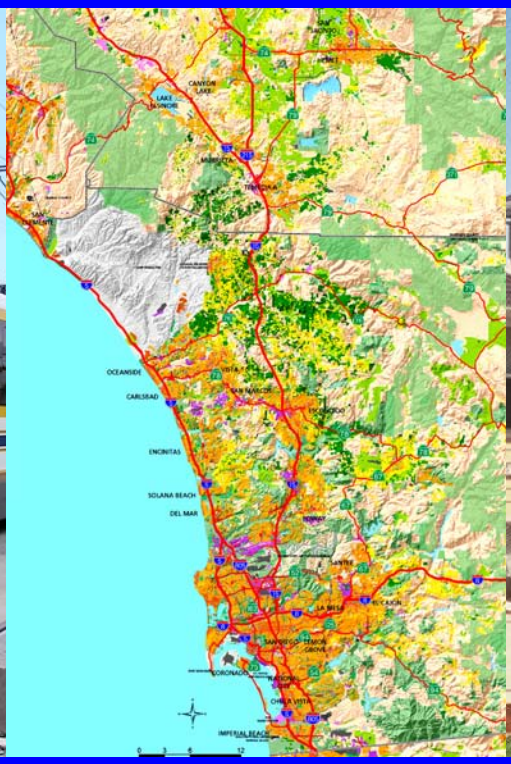
California's Inter-Regional Partnership Program

Jobs, Housing, and Mobility Strategies



California Department of Housing and Community Development
BUSINESS, TRANSPORTATION AND HOUSING AGENCY

California's Inter-Regional Partnership Program
Jobs, Housing and Mobility Strategies

June 2005

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This report describes and evaluates the California Inter-Regional Partnership (IRP) Program as of 2004. The purpose of the IRP Program was to "encourage state land-use patterns that balance the location of employment-generating uses so that employment-related commuting is minimized," and to provide a forum for some of the State's most impacted regions to deal collaboratively on issues regarding jobs, housing, and transportation.

The IRP Program was enacted by Chapter 52, Section 2240-112-0001, Provision 1, Chapter 665 (AB 2054), and Chapter 80 (AB 2864), Torlakson, Statutes of 2000; the timeline for a portion of the program was amended by Chapter 501, Statutes of 2003. The statute requires the Department to report an evaluation of the IRP program to the Legislature, although the final report on the IRP for the area covering Alameda, Contra Costa, Santa Clara, San Joaquin, and Stanislaus counties is not due until July 2008.

The State funded the IRP program to foster regional land-use planning related to jobs-housing relationships between counties or within multi-county councils of governments (COGs). The Department of Housing and Community Development (Department) awarded $3.2 million in one-time IRP Program funds to eight COGs to develop strategies to address the negative effects on communities when there is substantial imbalance of jobs and housing. The projects, which involved use of geographic information systems (GIS) mapping, ranged from initial convening of neighboring planning entities to address these issues to implementation of strategies by some of the larger COGs.

This report includes an overview of the IRP Program, evaluates issues relating to jobs-housing relationships, summarizes lessons from the IRP projects, and includes highlights of the summary reports of each of the eight IRPs funded by the program. Chapter 52 also required reporting on an inventory of the products of the program. The IRP products are summarized in this report, and on the following website, where an inventory of GIS maps, along with more complete reports on each of the IRP projects, are available:

http://www.abag.ca.gov/planning/interregional/stateirp/state_program.htm

The Department's assessment of jobs-housing balance issues identifies a host of factors involved in improving jobs housing relationships. These factors include different types and causes of jobs-housing imbalance, defining relevant geographic boundaries, the inevitability of growing traffic congestion in high growth areas, and the complex nature of household choices regarding residential location. Other factors involve appropriate measurement issues, differing development patterns among neighboring regions, and the difficulty of coordinating land-use and transportation within and between regions. There is therefore, no "one size fits all" prescription; it is necessary to evaluate each context to identify appropriate strategies. While there is debate about the role of several of these factors, planning with attention to jobs-housing balance relationships is critical. The impacts of jobs-housing imbalances can be most effectively moderated if planning for jobs and housing development is coordinated in advance of crisis conditions.

In general, the IRP projects benefited the State by advancing the leadership and coordinating role of the COGs involved in addressing inter-jurisdictional land-use issues within their regions. The outcomes of several of the IRP projects represent "cutting edge" planning efforts of significant benefit, including:

- GIS-based scenario planning of alternative development patterns and effects;
- Use of electronic technology and a variety of visual and broadcast media in engaging and broadening citizen participation;
- Experimentation with integrated land-use and transportation modeling, including regional monitoring of local land-use capacity; and
- Internet-based mapping assistance in identifying infill development.

The Department identified the following lessons from the IRP projects:

- There is growing experimentation with interactive land-use and transportation models.
- Effective efforts capture the public interest and are inclusive of the private, nonprofit, government and civic sectors.
- Local governments must act in concert to realize the projected benefits.
- Sustained leadership of elected officials on a regional basis is necessary.
- Geographic scale of inter-regional planning is critical.
- The IRPs generally avoided directly addressing more challenging or controversial housing issues.
- Incentives for implementation and ongoing planning support are necessary.

California's Inter-Regional Partnership Program

Introduction

Technology workers of the Silicon Valley commuting to homes in the San Joaquin Valley, farmworkers in Napa Valley vineyards commuting along winding roads to homes in Mendocino County, and Temecula residents commuting to jobs in San Diego, are examples of growing challenges to land-use policymakers. In many areas of the state, job creation is occurring in areas with housing shortages, and conversely, significant housing development is occurring without commensurate job growth. Because of this disparity, types of jobs or housing are not suited to the workforce residing in the area. The effects of this spatial mismatch of jobs and housing in the face of strong population growth results in increased time and distance workers must travel between home and employment. These effects exacerbate over-burdened highways affect goods movement, and our ultimate economic competitiveness. These effects also pose challenges to areas of public concern including the environment, the economy and social equity, which cut across county and regional boundaries.

This report describes projects begun under the Inter-Regional Partnership (IRP) Program. These IRP funds represent the State's initial funding for regional land-use planning between counties or among multi-county planning entities. For the most part, these projects were funded by the State IRP Program beginning in 2001 through June 2004. Several of the projects are continuing efforts with other funding sources.

This report includes an overview of the IRP Program, reviews issues relating to jobs housing relationships, summarizes lessons from the IRP projects, and includes highlights of the summary reports of each of the eight IRPs funded by the program. Complete reports and products from the IRP projects, including an electronic inventory of mapping products, can be viewed at the following website, established by Association of Bay Area Governments (ABAG):

http://www.abag.ca.gov/planning/interregional/stateirp/state_program.htm

Background

The IRP Program was enacted by Chapter 52, Section 2240-112-0001, Provision 1, Chapter 665 (AB 2054), and Chapter 80 (AB 2864), Torlakson, Statutes of 2000. There were separate statutory requirements for the IRP for the area covering Alameda, Contra Costa, Santa Clara, San Joaquin, and Stanislaus counties; the timeline for the final reporting for this IRP was extended by Chapter 501, Statutes of 2003. The statute requires the final report for this IRP by July 2008; this report includes an interim evaluation for this IRP.

The purpose of the IRP Program was to "encourage state land-use patterns that balance the location of employment-generating uses so that employment-related commuting is minimized," and to provide a forum for impacted regions to deal collaboratively on issues regarding jobs, housing, and transportation. The Program provided grant funding to regional planning agencies such as Council of Governments (COGs), sub-regional planning agencies and counties and involved collaboration with the federal and State governments. These organizations partnered to evaluate the effects of disproportional economic and residential development, to create strategies to address these effects, and design realistic implementation plans involving affected jurisdictions within the region where the jobs-housing imbalances exist. The Department of Housing and Community Development (Department) awarded $3.2 million in IRP Program funds to the COGs to develop mitigation strategies, addressing the negative effects of substantial imbalances between jobs and housing. The requirements for the grant program included:

- Collaborative work between two or more COGs, or two or more sub-regions.
- A study of possible mitigation of inter-regional employment and housing imbalances, and the development of strategies to mitigate the negative effects of the jobs-housing imbalance.
- Development and implementation of plans to promote and accommodate housing development in areas rich in jobs and job creation in predominately residential communities.
- Plans and models using geographic mapping, targeted policies and incentives, and integrated planning approaches that connect housing, transportation, and environmental issues to alleviate housing and job creation imbalances.
- Facilitation of meaningful collaboration between local governments, regional and sub-regional planning organizations, private sector housing and business organizations, public interest organizations and the general public.

One of the most prevalent symptoms of jobs-housing imbalance is the impact on the roadway system connecting major employment centers in areas with very high housing costs with sub-regional areas where housing is significantly more affordable. For the majority of the IRPs statewide, the issues that triggered interest in pursuing an IRP grant involved roadway congestion and safety, on some of the following highways:

- Altamonte Pass (I-580) between the San Francisco Bay area and the San Joaquin Valley;
- Star Route (SR) 17 and US Hwy 1 between Santa Cruz County and US Hwy 101 between Monterey/San Benito Counties and southern Santa Clara County;
- US Hwy101 in Santa Barbara County and northern Ventura County;
- US Hwy 50 and I-80 from the Sierra foothills, and Hwy 99, to/from Sacramento County;
- SR-14, I-5 and I 405 between the Antelope Valley and southwestern Los Angeles County;
- I-15 between Temecula/southwestern Riverside County and San Diego County; and
- SR-91 between Orange County and western Riverside County.

These areas include some of the State's (and country's) highest housing costs, largest affordability gaps and disparities and major employment centers.

Types of IRPs

This report describes the efforts of eight IRPs, and showcases the ways they propose to, or are, addressing jobs-housing balance issues in their regions. The underlying goal of the IRP Program was to advance and identify both the actual and perceived issues of jobs-housing balance, and to encourage regional collaboration to address these issues. The IRP projects brought together stakeholders in regions with "developing" partnerships for the first time, and strengthened, expanded and built upon analyses of jobs-housing relationships in regions which had already "established" inter-regional analytical relationships, and developed strategies for mitigating imbalances.

Developing IRPs are comprised of two or more COGs, or two or more sub-regions within a multi-county COG, that anticipate a significant imbalance between residential development and job creation will occur unless concerted efforts are made. Developing IRPs may not have dealt with multi-county regional planning issues previously. The developing IRPs include the following:

- Association of Monterey Bay Area Governments (AMBAG) –ABAG
- Mendocino Council of Governments (MCOG) - Wine Country IRP
- Santa Barbara County Association of Governments (SBCAG) – Ventura County

Established IRPs are comprised of two or more COGs, or two or more sub-regions within a multi-county COG representing distinct (regional) planning areas, which have identified and have some experience collaborating on multi-county regional planning issues. The ABAG-San Joaquin-Stanislaus Council of Governments (STANCOG) IRP had statutory requirements unique to it from the other IRPs, including an extended planning period ending in 2008. The established IRPs included the following grantees:

- Sacramento Area Council of Governments (SACOG)
- San Diego and Western Riverside Councils of Government (SANDAG/WRCOG)
- Southern California Association of Governments (SCAG)
- WRCOG/Orange County Council of Governments (OCCOG)
- ABAG/San Joaquin/STANCOG

Use of Geographic Information Systems (GIS) in the IRPs

The use of GIS was a major component of the IRP Program. GIS is a collection of computer software, hardware, and data that is used to store, manipulate, analyze, and present data geographically as a map. It combines layers of information and spatial features for viewing an analysis. GIS mapping offers visual tools in evaluating development issues in more effectively communicating spatial relationships, integration of different land uses or systems. This can be instrumental in helping communities work together and to make decisions. The intent was to advance the state-of-the-art where possible, and to utilize established and developing mapping tools to assess and help mitigate jobs-housing imbalances. The IRPs developed variations in GIS products, arising naturally from the different resources available in each IRP and the scale of the projects.

Each IRP was expected to develop a comprehensive integrated GIS for the project area that would compare land-use, demographic, economic and transportation data. GIS data included population, housing, and employment data. Traffic and transit capacity and usage, journey to work, general plan layers, and environmental data were also included in some of the integrated GIS data sets. The GIS mapping products are available at the State IRP website described previously. The following are examples of how GIS was used by the following IRPs.

ABAG: It developed and deployed an interactive website where users can query data for the study area. Baseline conditions and 20-year growth trends were identified and examined for both regions. Existing and planned conditions were identified for land-use, population, jobs, housing, other socioeconomic factors, and transportation and air quality impacts. This website offers data generated through the IRP project as well as provides promotional materials and work products, and allows members of the general public to request information and receive responses.

SACOG: In a unique interactive effort, the GIS was coupled with a simulation model, PLACE3S, a web-based planning program that enabled citizens at multiple local, county and regional workshops to test various policy options and explore benefits and impacts of various land-use scenarios. The GIS displays current and future land-use patterns, relative concentrations of jobs and housing, and key indicators reflecting the impact of policy changes and other implementation strategies. PLACE3S software allowed immediate illustration of the effects of expanded or limited development, through varying traffic projections, housing densities and other factors, which facilitated users to appreciate the consequences of various growth scenarios.

SCAG: The IRP produced two products, one for the City of Los Angeles and the other for the Greater Antelope Valley area. The Greater Antelope Valley Economic Alliance (GAVEA), an IRP partner, created a "Land Inventory." Using assessor's data and aerial photography layers, parcels in the study area were quantified for their potential for industrial or commercial use. An interactive GIS website named "LA LOTS" (Land Opportunity Tracking System) was developed as a comprehensive information system and interactive web portal for land/development analysis within the City.

Initial funding was provided to build a system that supported infill near transit stations in the City, but the City successfully leveraged resources to construct a platform that covers the entire County of Los Angeles, including transit nodes outside of the municipal boundaries. Aerial photographic layers assisted with the GIS presentation of sites with infill potential, sites that were of sufficient size for development or could be "assembled" for contiguous or scattered development. The interactive portal provides a platform for users to query as well as spatially map various possible sites for infill development opportunities. These tools were developed to enable housing developers, businesses, and the general public to search for available land that meets their specifications.

Evaluation of Jobs/Housing Balance Issues

The work of the IRPs on improving jobs-housing balance represents continuing exploration of these issues by planners and academicians. The Department made a selected bibliography of reports, studies and articles related to the issue of balancing jobs and housing available to the IRPs (see Appendix E), and some of these issues were discussed at several statewide meetings of the IRP project staff. Issues discussed in recent literature are summarized below.

"Jobs-housing balance" most commonly refers to the spatial relationship between the location of jobs and housing and the impacts of their relationship. In the broadest sense, jobs and housing supplies are in relative balance when there is an adequate supply of housing accessible to the workers, or adequate jobs for the residents, in a defined area, such as community or sub-region. Simply put, jobs/housing balance exists when an adequate supply of housing is located within a reasonable commute distance of compatible employment opportunities for the workforce. Yet, this simple phrase describes a reality that is complex, dynamic, and qualitative as well as quantitative. It requires "in-depth analyses of employment potential (existing and projected), housing demand (by income level and type), new housing production and the relationship between employment opportunities and housing availability."[1]

Current development patterns are characterized by relatively low density and dispersed distribution of housing, commercial buildings and employment. One manifestation is that jobs and housing are often not close to one another, resulting in longer commuting times that often diminish personal, family and community life. Increasingly, more people are finding they must live far from work to find affordable housing. Housing in more distant locations is less likely to be served by transit, making residents more auto dependent. Within the same context, established urban job centers and many of the region's older suburbs are experiencing disinvestment wasting prior investments in infrastructure and impairing their economic growth.

The State General Plan Guidelines acknowledge the importance of jobs-housing balance as an issue that crosses several elements of the General Plan and most directly affects the land-use, circulation, and housing elements. "Job/housing balance is based on the premise that commuting, the overall number of vehicle trips, and the resulting vehicle miles traveled (VMT) can be reduced when sufficient jobs are available locally to balance the employment demands of the community and when commercial services are convenient to residential areas." The Guidelines continue the discussion of the importance of sustainable development through strategies that include "higher density housing near employment centers, promoting infill and transit oriented development, and actively recruiting businesses that will use the local workforce skills, while including affordable housing opportunities near jobs."[2] It further states that "improving the jobs-housing balance requires careful planning for the location, intensity, and nature of jobs and housing in order to encourage a reduction in vehicle trips and miles traveled and a corresponding increase in the use of mass transit and alternative transportation methods, such as bicycles, carpools, and walking."[3]

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[1] State of California General Plan Guidelines,
http://www.opr.ca.gov/planning/PDFs/General_Plan_Guidelines_2003.pdf
[2] State of California General Plan Guidelines,
http://www.opr.ca.gov/planning/PDFs/General_Plan_Guidelines_2003.pdf
[3] Ibid

A 2004 court case, *Defend the Bay v. City of Irvine*, established precedent for a manner of addressing jobs-housing imbalance issues in environmental impact assessments pursuant to the California Environmental Quality Act (CEQA). An environmental group challenged a city's approval of a General Plan amendment and zoning for a proposed large-scale development. The court upheld the city's analysis, holding that adherence to any particular predetermined ratio was unnecessary, and that balance does not require equivalence, but rather a weighing of pros and cons to achieve an acceptable mix. It was noted that the General Plan requires the City to strive to improve the jobs-housing relationship.[4]

These issues have been studied for some time, notably by Robert Cervero, Professor of City and Regional Planning, University of California, Berkeley, author of five books on urban transportation issues. In a 1989 publication, Cervero observed "spatial mismatch between the location of jobs and the location of affordable housing . . . is forcing growing numbers of Americans to reside farther from their workplaces than they would otherwise choose and consequently, is intensifying congestion."[5] He attributed this "decentralization" to market forces and local decision-making that occurs without consideration of the regional implications.[6] In addition to weak regional planning, Cervero attributes decentralization and jobs-housing imbalances to fiscal and exclusionary zoning, growth moratoria, worker earnings/housing cost mismatches, increases in two wage-earner households, and job turnover.[7]

In a similar vein, a report on smart growth policy in California suggests that the jobs-housing imbalance is one indicator of sprawling urban/suburban growth which is "largely a product of zoning regulations – originally intended to separate housing from sooty industrial uses – which have evolved into a complex and largely counterproductive practice of separating houses from apartments, offices from residences, medical offices from commercial offices, and shopping centers from the neighborhoods where shoppers live."[8]

Researchers such as Belsky, et. al., identify aspects of jobs-housing imbalance not as a geographic problem, but as a fundamental lack of decent affordable housing for all workers, regardless of their income level. "There is a fundamental disconnect between the rate at which the incomes of low-income households are growing and the rate at which rents are escalating. Though incomes stagnated for many households over the 1990's, home prices soared."[9] Disparity in incomes over the past 25 years has reached a critical state. The demand for low-wage workers, many of whose wages are inadequate to cover housing and other essential costs of living, and inadequate government assistance for affordable housing, will continue to exacerbate jobs-housing balance based on inability to pay.

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[4] Shigley, Paul, *Courts Uphold Project Description, Housing Analysis In Separate EIRs.* CP&DR, Aug. 2004, Vol. 19, Issue No. 8.
[5] Cervero, Robert, *Jobs-Housing Balancing and Regional Mobility.* Journal of the American Planning Association, Spring, 1989, Pg. 136.
[6] Ibid, Pg. 138.
[7] Ibid, Pg. 139.
[8] Alminana, Robert, et. al., *White Paper on Smart Growth Policy in California*. Prepared for the State of California, Governor's Office of Planning and Research, Feb. 10, 2003, Pg. 2.
[9] Belsky, Eric; Calder, Allegra and Drew, Rachel, *The Real Jobs-Housing Mismatch.* Shelterforce, July/August 2004, Pg. 18-21.

Strategies such as creating or increasing the job base in a housing-rich region, or building houses to accommodate job-rich regions, cannot alone correct significant jobs-housing imbalances. Understanding the *type* of jobs-housing balance in a locality or sub-region is critical, as well as the types of jobs and housing, respectively. Relative parity of wage stratification and housing costs in an area is necessary for qualitative jobs-housing balance.

Jobs-Housing Balance Typology

In an American Planning Association Planning Advisory Service (PAS) report, Dr. Jerry Weitz explores the aspect of jobs-housing balance in detail. Weitz asserts that the balance of jobs and housing can be a useful planning tool for local governments. He acknowledges that there is debate whether a "correct" jobs-housing balance can actually reduce VMT, and whether there is a "correct" relationship or ratio. The PAS report's overview of jobs-housing balance also describes the need to go beyond purely numerical equality when evaluating regional jobs-housing balance. Weitz describes the qualitative component that must complement the quantitative comparison of jobs to housing units, or jobs to employed workers. These four types are summarized in the below figure, and explained in more detail. Most of the IRPs fall within more than one classification.

Types of Jobs-Housing Imbalance*[10]

Type of Imbalance	Jobs	Housing	Example
Type 1	Too many low-wage	Too few low-end	Suburban employment centers (or "edge cities")
Type 2	Too many high-wage	Too few high-end	Downtown employment areas in central cities
Type 3	Too few low-wage	Too much low-end	Older suburbs and central-city neighborhoods
Type 4	Too few high-wage	Too much high-end	High-income bedroom communities

*Reprinted from Table 5. Typology of Jobs-Housing Imbalances PAS Report (Weitz, 5)

Type 1: The area is job-rich and needs more housing for low-wage workers.

Type 1 imbalances occur in job-rich cities and counties that lack adequate affordable housing. This prevalent type occurs in suburban job centers which have a lot of entry-level retail and service jobs, but little or no low- to moderate-income housing. The provision of affordable housing near the job centers for low wage workers would reduce commuting from lower cost housing areas. Prospects for affordable housing in these areas include upzoning of neighborhoods near downtown and mixed-use development.

[10] Weitz, Jerry, *Jobs-Housing Balance*, American Planning Association – Planning Advisory Service Report No. 516 (Nov. 2003).

The MCOG IRP is an example where portions of the project area, such as Sonoma and Napa, are relatively jobs-rich but lack housing for low-wage workers. The Wine Country region has a volatile housing market that not only severely hampers housing for low-wage workers but also for the majority of the workforce. In 2004, this IRP reported that the average cost of housing increased by over "$100,000 in a single year for this region."

Type 2: The area is job-rich and needs more housing for higher-wage workers.

Type 2 imbalances occur in job-rich cities and counties. However, in contrast to Type 1, these jobs are often predominately higher-wage executive, managerial, and professional positions. An example that Dr. Weitz gives is metropolitan financial and governmental centers, where there is a lack of residential market due to concerns about lacking amenities, public schools, and crime. However, Dr. Weitz notes that this imbalance type is rare, and usually self-correcting through the market. He concludes that this type of imbalance is unique in each jurisdiction, and must be analyzed for the reasons behind a lack of market response to jobs-housing imbalance, in order to craft policy to address the imbalance.

Orange County, a partner of the WRCOG IRP, to some extent fits into this category. The County has a well-educated labor force, numerous high-end businesses and more jobs than local workers to fill them. Housing supply has not been able to expand enough to meet demand and as a result, housing prices have soared. It was reported in the WRCOG IRP that under 17 percent of families can afford the median priced homes, despite having the highest incomes in southern California.

Type 3: The area is job-poor and needs more employment opportunities for the resident, lower-wage labor force.

Dr. Weitz describes these as primarily residential older suburbs and central-city neighborhoods, where low-wage workers must travel to suitable employment. This imbalance is served by "economic development" policies that bring in lower-skilled jobs closer to the neighborhoods of the resident work force.

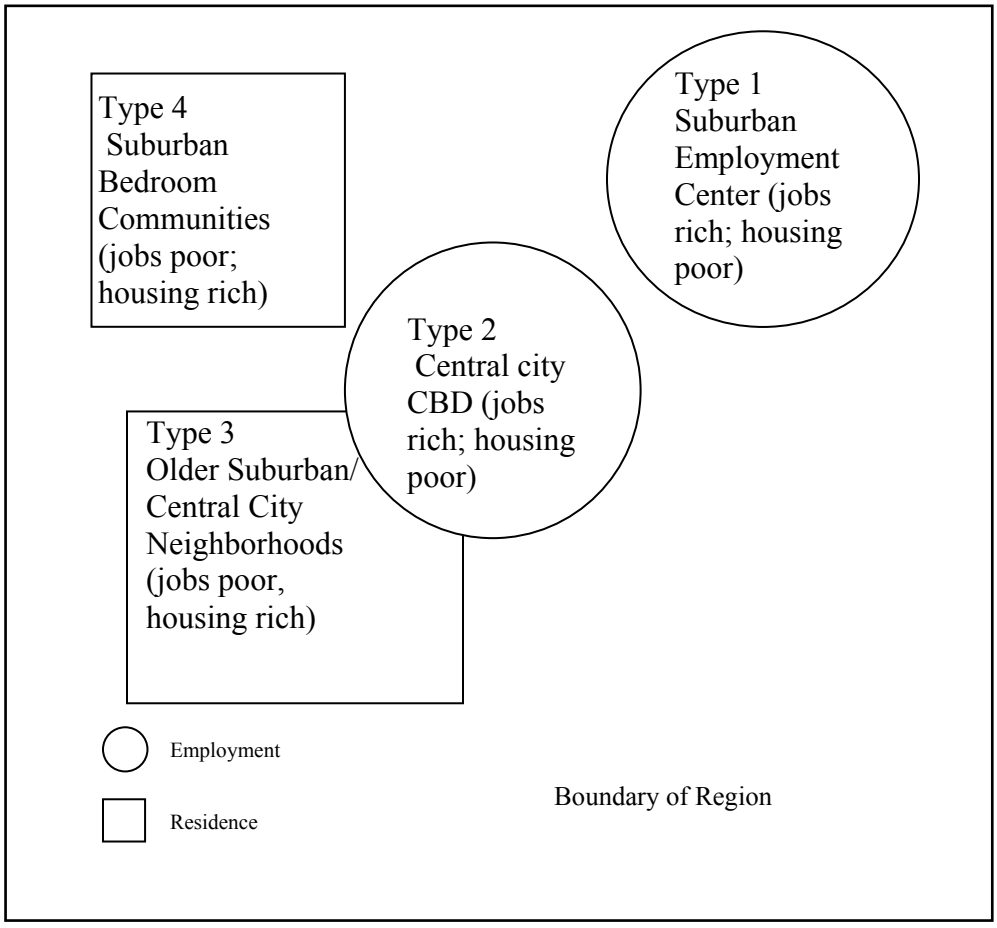
The converse of Orange County is an example of Riverside County, a partner of the WRCOG IRP, where portions of Riverside County can be characterized as having a young and rapidly growing population with a "modestly educated labor force." Despite recent job growth, there are still fewer jobs than resident workers.

Type 4: The area is job-poor but has a highly skilled resident labor force.

Dr. Weitz uses middle- and high-income suburban areas as an example of this type of imbalance. It results from land-use policies that are designed to maintain the residential nature of the region. This imbalance is countered by appropriate land-use policies (e.g., zoning) that do not constrain the natural market response to this type of imbalance, when locating close to a highly skilled work force is desirable to employers. Dr. Weitz recommends that change in local land-use policies is the most appropriate policy response for this type of imbalance.

All of the IRPs have some suburban communities which are predominantly residential without employment opportunities matching the skills of the resident workforce. The Greater Antelope Valley Economic Alliance, a partner of the SCAG IRP, is fairly representative of the Type 4 typology.

Four Types of Jobs-Housing Imbalanced Areas
Regional Result in Longer Commute Trips
(Recreated from Weitz, 7)



Congestion: One Aspect of Jobs-Housing Balance

Often, the discussion of jobs-housing balance is driven by transportation problems, particularly congestion. The widely recognized Texas Transportation Institute's (TTI) 2004 Urban Mobility Report reported these sobering conditions: [11]

- The Los Angeles Area (including Ventura and Orange Counties) has the worst traffic.
- Motorists in the Inland Empire region have seen an increase of more than 500 percent in time stuck in traffic congestion, from an average of nine hours in 1982, to 57 hours in 2002.
- The San Francisco Bay Area was second in amount of increase, with an increase of almost 22 percent in traffic delays over the past decade.
- California is home to four of the nation's ten most congested metropolitan areas (Los Angeles, San Francisco-Oakland, the Inland Empire, and San Jose), with San Diego and Sacramento not far behind.

Transportation behavior is greatly affected by household, employment and service location. It has been alleged that jobs-housing imbalances seem to be a root cause of many problems plaguing American's metropolises, not the least of which has been increased regional traffic congestion. Jobs-housing balance has emerged from concerns about the lack of affordable housing both in central cities and suburbs, the desire to maintain the economic viability of downtowns, and the prevalence of exclusionary zoning practices that have restricted the supply and variety of housing available in suburban areas. All of these issues are made more complex by the more generalized concern over growing traffic congestion. Congestion misallocates scarce resources and causes economic inefficiency.

Decentralization of jobs, away from where public transportation is concentrated, poses one of the most significant challenges to equitable metropolitan growth. It increases the need for automobile travel as a necessity. Distance often precludes the most inexpensive modes of transportation, walking, or bicycling. Economic development incentives to create or retain jobs generally do not require companies to site those jobs at locations that are served by public transit.

If people must live far from where they work, then they will spend greater time, effort, and money traveling between the two, particularly in an auto-dependent society like California. This increased travel can contribute to congestion, air pollution, longer commute times, increased stress, lowered productivity, overloaded infrastructure, reduced economic development and increased environmental impacts. "Jobs-housing balance puts these problems together and attempts to solve all of them."[12]

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[11] Schrank, David and Tim, Lomax, *The Urban Mobility Report.* Texas A&M University: Texas Transportation Institute, Sept. 2004, http://mobility.tamu.edu

[12] Giuliano, Genevieve, *Is Jobs-Housing Balance a Transportation Issue?* Transportation Research Record, 1991, No. 1305, Pg. 305-312. Reprinted as UCTC Paper No. 133, Pg. 311.

It has been recognized that traffic congestion cannot be "solved" with jobs-housing balance strategies alone. "Jobs-housing balance as a strategy to combat growing traffic congestion and air pollution has been advanced on the basis of logic which is persuasive but tested at the most aggregate level."[13] "This does not mean that improving the jobs-housing balance in a region is a bad idea or that it would produce no social benefits . . . but that strategy should not be pursued primarily to reduce traffic congestion."[14] Jobs-housing balance is not a panacea for congestion, but can produce benefits including enhanced opportunities for choice in residential location, and can provide transportation options allowing reduction in auto dependence and shorter commutes than would otherwise occur.[15]

The possible causes of jobs-housing imbalance are as numerous and controversial as the effects. While jobs-housing imbalance may contribute to traffic congestion, as pointed out by Dr. Anthony Downs, of the Brookings Institution, many firms and workers try to avoid congestion by decentralizing their job and housing locations, thereby causing greater dispersion than would otherwise occur."[16] In the Bay Area, problems of jobs-housing imbalance are mainly caused by the lack of affordable housing and supply in the job-rich cities causing longer durations of work trips, greater auto dependency and increasing VMT. In the greater Antelope Valley (SCAG IRP), an area that includes north Los Angeles and eastern Kern counties, households with workers traveling outside of the Antelope Valley reported the highest average household income ($76,294 per year) in contrast to households with adult members working at jobs within the Antelope Valley ($64,379 per year), communities such as Lancaster or Palmdale.

Arguments on the Influence of Jobs-Housing Balance Policies

There is debate among both researchers and practitioners on whether jobs-housing balance measures can or should play a meaningful role in transportation and land-use decisions. One of the most vocal critics of jobs-housing balance as a planning tool is Dr. Genevieve Giuliano, of the University of Southern California School of Policy, Planning and Development. She has researched jobs-housing balance issues extensively, publishing "Is Jobs-Housing Balance a Transportation Issue?" in the *Transportation Research Record*. In this article, Dr. Giuliano states that the "viability of jobs-housing balance policy rests on two critical assumptions: first, that policy intervention is required to achieve jobs-housing balance, and second, that there is a significant causal relationship between jobs-housing balance and travel behavior."[17]

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[13] Wachs, Martin, et. al., *The Changing Commute: A Case Study of the Jobs/Housing Relationship over Time*. University of California, Berkeley: University of California Transportation Center (UCTC), Apr. 1993, Paper No. 167, Pg. 17.

[14] Downs, Anthony, *Still Stuck in Traffic: Coping with Peak-Hour Traffic Congestion*. Brookings Institution Press, 2004, Pg. 244.

[15] Levine, J, *Rethinking Accessibility and Jobs-Housing Balance*. Journal of the American Planning Ass'n., Spring 1998, Vol. 64: No. 2, Pg. 133-149.

[16] Downs, Anthony, *Still Stuck in Traffic: Coping with Peak-Hour Traffic Congestion*. Brookings Institution Press, 2004, Chapter 13, Pg. 3.

[17] Giuliano, Genevieve, *Is Jobs-Housing Balance a Transportation Issue?* Transportation Research Record, 1991, No. 1305, Pg. 305-312. Reprinted as UCTC Paper No. 133, Pg. 306.

In her research, Giuliani finds that outlying suburbs will always be unbalanced and changing, as households seek lower-cost housing at the edge of metropolitan areas, and eventually the growing labor force attracts employers to relocate. Recent growth trends in the United States (U.S.), particularly in California, have been ones of decentralization. In an analysis of U.S. census 2000 data of 85 major metropolitan areas, Alan Berube and Benjamin Forman found that "decentralization remained the dominant trend across all metropolitan areas. Suburban population grew at twice the rate of central city population, and no matter how fast cities grew, their suburbs consistently grew faster."[18]

Giuliano also argues that downtown areas will generally be unbalanced, since limited space allows only high-density development, while housing predominant preferences continue to be for large lot, unattached housing. Finally, she states that "although isolated examples of jobs-housing mismatches have been identified at the community level, there is little evidence suggesting that such mismatches have significantly affected commuting patterns. Regulatory policies aimed at improving jobs-housing balance are thus unlikely to have any measurable impact."[19] However, it must be noted that Giuliano also finds evidence that jobs-housing balance should play a part in land-use planning.

Another critic of relying too heavily on jobs-housing balance policy to relive traffic congestion is Dr. Anthony Downs of the Brookings Institution, a self-proclaimed "World's Leading Authority on real estate and urban affairs." Downs is considered to be a leading expert in traffic congestion and urban policy, including publication of his seminal book *Stuck in Traffic* in 1992 and the updated and revised version *Still Stuck in Traffic* in 2004. In the recent edition, Downs devotes an entire chapter to "Changing the Jobs-Housing Balance."[20] His caveats about jobs-housing balance apply to four major areas: the geographic scale of jobs-housing balance, measurement errors, typologies, and the importance of market forces and American behavior.

Noting the importance of geographic scale of the target area for jobs housing relationships, Downs says, "An essential part of any balancing strategy is to decide exactly where to draw sub-regional boundaries. In theory, such boundaries ought to demarcate so-called commute sheds. However, putting this concept into practice is extremely difficult."[21] He goes on to say that "The entire balancing act is greatly affected by a purely arbitrary decision concerning how large the sub-regions are made . . . the feasibility of achieving a desired jobs-housing balance depends on exactly how boundaries are drawn for the sub-regions concerned." And although designating sub-regions affects the quantitative jobs-housing balance measurement, Downs points out that the definition of sub-regions is political, rather than purely scientific.[22]

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[18] Berube, Alan and Benjamin, Forman, *Patchwork Cities: Patterns of Urban Population Growth in the 1990s*. Published in *Redefining Urban and Suburban America*, Bruce Katz and Robert E. Lang, Eds. Washington, D.C.: Brookings Institution Press, 2003.
[19] Ibid, Pg. 311.
[20] Downs, Anthony, *Still Stuck in Traffic: Coping with Peak-Hour Traffic Congestion*. Brookings Institution Press, 2004, Chapter 13.
[21] Ibid, Pg. 239.
[22] Ibid, Pg. 238-239.

Downs also acknowledges the technical difficulties for planners working on both assessment of conditions and proposing more effective alternatives, given the dynamic nature of the issue. Available data is generally several years old, and in rapidly growing areas, this may render policies based on obsolete or inappropriate data. Because of the dynamics of data, urban growth, and changing policies, a steady jobs-housing balance is difficult to sustain.[23]
Most telling is Downs' discussion of the effect of market forces and human choices. He finds that "significant jobs-housing imbalances are socially and economically efficient results of the 'normal' urban development process." Downs finds that jobs-housing balance varies greatly from place to place, with a "natural evolution" that depends on local conditions.[24] Giuliano has also observed that households move outward in search of cheaper, larger housing until jobs follow them, and the process repeats itself while development continues outward. Her more recent research of the greater Los Angeles urban area, however, identifies trends of both deconcentration and concentration occurring. She finds polycentric development patterns of centers outside city cores growing faster than the core, employment growth in older suburbs concentrating, and employment growth in newer suburbs dispersing.[25]

The composition of population growth within regions also affects jobs housing relationships. A leading U.S. demographer, William Frey, has concluded that urbanization patterns involving deconcentration of population from large cities, prevalent in the U.S. since the 1970s, may be changing as a result of emerging international migration trends. He has observed that the concentration of immigrants in selected large "port of entry" metropolitan areas such as Los Angeles is resulting in significant demographic differences between regions, and thus different development patterns.[26] The former are more likely to have younger age structures and to be multi-ethnic than other metropolitan areas, which are key variables influencing housing demand.

Downs also notes it is the combination of personal choices, combined with the relative ease of relocating, which determines residential location: "most policies seeking to reduce jobs-housing imbalances implicitly assume that most people would like to live as close to their jobs as possible. But experience suggests otherwise . . . it is particularly likely to plague any strategy to attain a jobs-housing balance because of the high mobility of American households."[27]

The motivations for household decisions are complex, and housing choices are, financially and personally, one of the largest decisions households make. The increase of multiple wage-earner households, issues such as safe schools and neighborhoods, and cultural opportunities, as well as increasing amount of recreational travel, further complicate both housing choice and its relationship to transportation, the environment, quality of life, and the other facets of jobs-housing balance.

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[23] Downs, Anthony, *Still Stuck in Traffic: Coping with Peak-Hour Traffic Congestion*. Brookings Institution Press, 2004, Pg. 231.
[24] Ibid, Pg. 232.
[25] Giulano, G. and Redfearn, C., et. al., *Not all Sprawl: Evolution of Employment Concentrations in Los Angeles 1980–2000*. School of Policy, Planning and Development, USC, Los Angeles, CA, Feb. 2005, Pg. 4.
[26] Edward Elgar, Publishers, *A History of Recent Development in the United States International Handbook of Urban Systems*, Northhampton, MA, 2002, Chapter 14.
[27] Downs, Anthony, *Still Stuck in Traffic: Coping with Peak-Hour Traffic Congestion*. Brookings Institution Press, 2004, Pg. 237, 240.

Measurement Issues

Jobs-to-housing ratios are sometimes used to characterize jobs-housing balance, yet identifying an appropriate ratio for use as target is difficult. A crude measure of jobs-housing balance is sometimes presented as a jobs-to-employed residents' ratio, where a ratio of 1:1 represents one job for each household. Generally, when the ratio is below 1.0 the area is considered to have a jobs deficit and housing surplus. This is a general indication of the need of the community to commute out of the area for employment. When the ratio is above 1.0 the area is considered to have a housing deficit and jobs surplus.

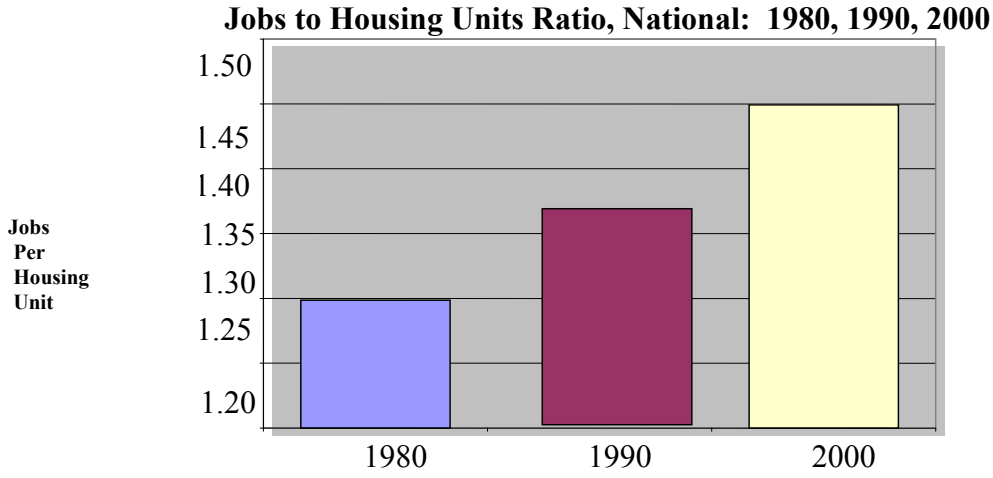
When the National Center for Smart Growth Research and Education analyzed U.S. Census data from 1980, 1990, and 2000, they found that the number of housing units per job was falling each decade. The jobs-housing ratio of the U.S. has grown increasingly larger since 1980, growing from 1.3, to1.36, to 1.45 (see the figure on page 15).[28]

A 1.5 ratio often cited recently in California was based on an observation of the California Department of Finance (the ratio of jobs and housing units created in the decade of the 1990s, a decade lagging in housing construction). This 1.5 ratio reported by DOF was descriptive, and not intended to represent a prescriptive standard. California, as a whole, had in 2000 a ratio of jobs to households of 1.28 and a ratio of jobs to housing units of 1.20, based on 14.7 million jobs per the Employment Development Department 11.5 million households, and 12.0 million non-recreational housing units per the U.S. Census Bureau. Thus, the actual California ratios render impossible a 1.5 ratio in every county, or even a 1.3 ratio. Since those 1.2 and 1.28 ratios from the 2000 data came from a year that was a boom for jobs but extremely low housing vacancy rates, a desirable ratio would have more housing units to allow people to form households as they would wish, and thus a desirable ratio is probably closer to 1.1 job to housing unit. Depending on the geographic context, use of target ratios larger than 1.3 may mislead users to underestimate the need for housing.

Wide variation in data items and sources used to measure housing and employment also confuse the use of ratio indicators of job housing balance.[29] Some of the variation is accounted for by the difference in estimating existing or prior data points versus projections or forecasts for the future. Forecasts are of course, subject to fundamental uncertainty, particularly below a regional scale.

[28] Knaap, G., Sohn, J., Frece, J. and Holler, E., *Smart Growth, Housing Markets, and Development Trends in the Baltimore-Washington Corridor*. National Center for Smart Growth Research and Education, the University of Maryland College Park, Nov. 2003, Pg. 10.

[29] Memorandum to the Business, Transportation and Housing Agency, Division of Housing Policy Development, CA Department of Housing and Community Development, April 21, 2004.



Metropolitan Planning Organizations (MPOs) use different data measures and data sources from each other. For example, some use "housing units" (including vacant and occupied units), while others use "households" (occupied housing units). For comparative purposes, the distinction is significant, given significant variation in occupancy rates in different regions. Employment is even more varied. Jurisdictions consult the U.S. Census and a variety of other sources to collect roughly a half dozen measurements of employment. This has significant effects on the compatibility of the data and limits its comparative use.

Consequently, researchers such as Cervero argue against any universal standard for jobs-housing balance, but, "Rather, policies for regional growth management that are deemed appropriate should be applied selectively and judiciously."[30] Differences in what future period is being forecasted, and the difficulties inherent in the measure of present relationships of jobs-to-housing, render these indicators meaningful only in a more comprehensive analysis where additional contextual information or indicators are also considered. Such analysis might include commute distances, average commute times, rate of housing occupancy, turn over, and basic normalizing of data, as well as other factors.

Research by Cervero in the San Francisco Bay Area suggested that "qualitative mismatches, such as between worker earnings and housing prices, are more of a barrier to balanced growth than are quantitative mismatches." A case in point was the City of Pleasanton, which had become one of the region's growing and most balanced communities in the 1980s, yet both most of the workers and residents lived or worked (respectively) outside the community. Housing production lagged employment growth because of the City's growth moratoria, and much of the new housing was not affordable to the workers. Cervero concluded that the core of the jobs-housing balance problem "lies with job-rich communities excluding categories of housing for fiscal and parochial reasons, to the detriment of their region at large . . . any problem of jobs-housing imbalance is fundamentally one of barriers to the production of suitable housing in job-rich cities and sub regions. Cervero asserts that a well-functioning marketplace with sufficient housing and corporate locational

[30] Cervero, Robert, *Jobs-Housing Balance Revisited*, Trends and Impacts in the San Francisco Bay Area. Journal of the American Planning Association, 1996, Vol. 62: No. 4, Pg. 508.

choices are likely to be achieved by eliminating frictions to residential mobility and the flow of housing capital.[31] As discussed by Drs. Giuliano, Downs, and other researchers cited in this report, the needs and priorities of individual regions are important. This point is echoed in the academic literature and among the regional and local governments. As noted by the TTI Mobility Report, "the solutions will vary not only by the state or city they are implemented in, but also by the type of development, the level of activity and constraints in particular sub-regions, neighborhoods and activity centers."[32]

Regional Context

Despite debate in the academic and planning literature about the relevance of jobs-housing balance measurements described in earlier sections, there is agreement that jobs-housing balance plays a part in regional growth planning, and many policy proposals incorporate jobs-housing balance in some way. The most significant impacts of growth are manifest at the regional level: "As the historic boundaries of cities, counties and even states mean less and less in an age of global markets, electronic commerce and increasing individual mobility, the importance of regional economies and regional approaches to economic development, housing and transportation has been increasingly acknowledged . . . the lesson increasingly appears to be that transportation policies as well as a host of other program areas are best coordinated at the regional level, while still recognizing local land use authority."[33]

However, incorporating these land-use policies at the regional level is a difficult task. As described in his book *Stuck in Traffic*, Anthony Downs describes the circumstances that must occur before these types of regional-level land-use policies can be adopted. Downs theorizes that "First, traffic congestion [and other negative effects of jobs/housing imbalance] must become so widespread and so intolerable that a large fraction of the metropolitan area's citizenry views it as a crisis. Second, key State and local officials – especially the Governor – must believe that carrying out regional anti-congestion tactics is essential to remedying this crisis. Third, there must be some credible institutional structure available through which to accomplish those regional tactics."[34]

California may be nearing (or has perhaps reached) this breaking point. Congestion is often quoted as one of the biggest concerns, if not the biggest, of both residents and businesses. The availability of affordable housing is a close second. It is important to frame the issue properly, to make the connection between congestion, housing accessibility, health and air quality issues, economic robustness, overall quality of life, and jobs-housing balance.

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[31] Ibid, 492-511.
[32] Schrank, David and Lomax, Tim, *The Urban Mobility Repor*. Texas A&M University: Texas Transportation Institute, Sept. 2004, Pg. 4, http://mobility.tamu.edu
[33] Surface Transportation Policy Project, *Beyond Gridlock: Meeting California's Transportation Needs in the Twenty-First Century*, May 2000, Pg. 27.
[34] Downs, Anthony, *Still Stuck in Traffic: Coping with Peak-Hour Traffic Congestion*. Brookings Institution Press, 2004, Chapter 13.

The TTI report points out the need for action in advance of severe congestion: "Major projects, programs and funding efforts take 10 to 15 years to develop. In the mean time, congestion endured by travelers and businesses grows, and is passed down to the next largest trafficked area, so that in a period of ten years, medium-sized regions will have the traffic problems that large metropolitan areas have, if trends do not change. A variety of techniques are being tested in urban areas to change the way commercial, office and residential development occurs." The TTI notes these appear to be part, but not all, of the solution.[35] Analysis of alternative development patterns (scenario analysis) within a regional context is one of the techniques being used to study and develop strategies for improving jobs-housing balance. The *Smart Growth Strategy Regional Livability Footprint Project,* for example, assessed prospective geographic commute sheds, by analyzing 15 key corridors or commute areas of the nine-county San Francisco Bay Area. [36] Using two methods of analysis, the study compared maintaining the status quo growth patterns, or "base case," to applying "smart growth" scenarios. Smart growth policies were intended to promote "development that revitalizes central cities and older suburbs, supports and enhances public transit, promotes walking and bicycling, and preserves open spaces and agricultural lands."[37]

The results indicated that applying smart growth techniques to create a jobs-housing balance in communities, based on strategic location of new jobs and new housing, would retard current trends in which many Bay Area residents have to drive long distances to work. The study estimated, for example, that only nine percent of new housing in the base case would be affordable to new nearby workers, while under the Smart Growth Scenario, there would be a dramatic improvement – an estimated 62 percent of new households could be affordable to new nearby workers.[38]

While it is an emerging area of study, there has been limited assessment of the transportation and land-use policies and the potential for land-use policies to influence transportation outcomes. From study of the literature across subjects, researchers at the National Centre for Smart Growth Research and Education reached the following conclusions:[39]

- "Land-use can affect transportation behavior, but the evidence is more compelling on how land-use affects transportation behavior at the neighborhood scale than at the metropolitan scale;
- Transportation infrastructure can affect land-use but the effects are often small without accommodating, or countervailing, land-use policies; and
- Land-use regimes and regulations can affect land-use, but many land-use regulations are much more effective at limiting development than increasing densities."

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[35] Schrank, David and Lomax, Tim, *The Urban Mobility Report*. Texas A&M University: Texas Transportation Institute, 2004, Pg. 5. Website: *http://mobility.tamu.edu*

[36] Association of Bay Area Governments, *Smart Growth Strategy Regional Livability Footprint Project-Shaping the Future in the Nine-County Bay Area, Final Report*, October 2002, Pg. 24. *http://www.abag.ca.gov/planning/smartgrowth/whatisSG.html*

[37] Ibid

[38] Ibid, Pg. 25.

[39] Knaap, G., Sohn, J., et. al., *The Transportation-Land Use Policy Connection*. Prepared for Presentation at the Conference Entitled, "Access to Destination: Rethinking the Transportation Future of Our Region", November 2004. *http://www.smartgrowth.umd.edu/research/pdf/KnaapSong_TransLandPolicy_022305.doc*

Summary of Jobs-Housing Issues

There are a host of factors involved in improving jobs housing relationships. These factors include different types and causes of jobs-housing imbalance, defining relevant geographic boundaries, the inevitability of growing traffic congestion in high growth areas, and the complex nature of household choices regarding residential location. Other factors involve appropriate measurement issues, differing development patterns among neighboring regions, and the difficulty of coordinating land-use and transportation within and between regions. There is therefore, no "one size fits all" prescription; it is necessary to evaluate each context to identify appropriate strategies. While there is debate about the role of several of these factors, planning with attention to jobs-housing balance relationships is critical. The impacts of jobs-housing imbalances can be most effectively moderated if planning for jobs and housing development is coordinated in advance of crisis conditions. The IRP projects represent efforts to foster and improve such planning.

Lessons Related to the IRP Projects

Several of the IRP projects represent "cutting edge" planning efforts. These include:

- GIS-based scenario planning of alternative development patterns and effects;
- Use of electronic technology and a variety of visual and broadcast media in engaging and broadening citizen participation;
- Experimentation with integrated land-use and transportation modeling, including regional monitoring of local land-use capacity; and
- Internet-based mapping assistance in identifying infill development.

Indeed, SACOG's Blueprint the Transportation/Land Use Study (the Blueprint Project) project has garnered national attention and awards. In general, the projects advanced the leadership and coordinating role of the COGs involved in addressing inter-jurisdictional land-use issues within their regions.

The IRP projects in several cases represented the first step in acknowledging and discussing the inter-regional effects of jobs-housing imbalance and land-use and transportation issues by convening elected officials and other stakeholders from neighboring regions. Some of the proposed strategies dovetail with existing COG planning and resource allocation. Consequently, newly dedicated resources, while desirable, may not be necessary to make headway with some of the proposed strategies of the IRP projects. Some aspects of proposed strategies to improve jobs-housing relationships, e.g., "smart growth" planning principles, involve efforts already underway or being attempted by a number of local governments. However, some regions are more internally motivated than others to pursue implementation of strategies identified by their IRP project, and are dedicating additional resources to do so.

Based on outcomes of the IRP projects and review of literature related to jobs-housing balance issues, the following points are instructive for planning efforts:

- **There is growing experimentation with interactive land-use and transportation models.** In the past, much of transportation modeling in particular, has accepted existing or planned land-use designations as given. Recent experiments with land-use and transportation modeling are incorporating feedback from transportation to land-use and are interactive. Such modeling allows communities to evaluate different future scenarios based on different land-use patterns. The SACOG IRP's Blueprint Project, building upon work pioneered by Portland's LUTRAC project of the 1990s, represents leading innovation in this field. The Department of Transportation (CalTrans) is funding research related to these issues in California.

- **Effective efforts capture the public interest and are inclusive of the private, nonprofit, government and civic sectors**. Governmental efforts alone are unlikely to garner support as widespread as is necessary to address the cross-cutting impacts of traffic congestion, job locations, and housing affordability. Educational components to such planning efforts are important, as the specialized nature of each of these functional areas is often not understood by the public or by professionals working in one of these fields. Several IRPs are tackling the challenge of building support for different types of housing development through ongoing educational efforts. For example, the WRCOG-OCCOG IRP has initiated a public engagement process and is actively seeking support for the project. SACOG sponsors monthly workshops for its members and is also continuing and expanding efforts to engage the public in understanding the trade offs and benefits of creating sustainable land-use patterns that promote adequate housing supplies.

- **Local governments must act in concert to realize the projected benefits.** This is necessary because the impacts and benefits of planned policies, criteria, or programs are inter-dependent. For the most part, local governments are accustomed to acting at their own pace and in their own interests on land-use issues. The nature of policies and actions necessary to effectively implement or realize inter-jurisdictional benefits may be perceived as threatening to local control of land-use decisions. Therefore, for this and some of the reasons described below, progress in addressing inter-jurisdictional land-use issues such as jobs-housing imbalance will likely be dependent on some degree of regulatory or statutory direction.

- **Sustained leadership of elected officials on a regional basis is necessary.** Developing and maintaining regional leadership for local implementation of change in the face of regular turnover of local officials is challenging. Elected officials must be responsive to local voters to stay in office while being willing to advocate for regional interests in the face of local opposition when necessary. There are no quick fixes to jobs-housing imbalance issues or controversy over growth and development. There is generally a long lag time between approval of land-use and transportation policies and plans and realization of their resulting projects or outcomes. It is important to develop and maintain some short-term projects and outcomes to maintain focus and the attention and support of the public. Efforts which attract positive attention of the local media are most likely to be effective.

- **Geographic scale of inter-regional planning is critical.** It's important to begin at a small scale and gradually expand successful efforts to larger areas. It is relevant to how jobs-housing imbalances are perceived and measured, and the number, size, and role of players that must be involved to effect change. It is difficult for COGs to be effective in inter-regional planning if they have not first effectively implemented policies being advocated between regions within their own county or region. For example, if jurisdictions within County A are unwilling or unable to curtail sprawling development patterns amongst themselves, they have little leverage in convincing jurisdictions of neighboring County B to do so to curtail negative impacts to jurisdictions in County A. As development patterns within counties generally involve boundary definitions, and policies for boundary changes, it is critical that local area formation commissions (LAFCOs) be involved from the onset in inter-regional planning efforts.

- **The IRPs generally avoided directly addressing more challenging or controversial housing issues.** While support for reducing congestion is readily come by, tackling the subject of building support for more housing or for affordable housing is more politically challenging. Some of the IRPs include areas with strong anti-growth sentiments, embedded in local land use and transportation policies. Despite acknowledgment of insufficient housing supplies or inadequately planned residential development capacity, for the most part, the IRPs did not directly confront issues of discretionary local land-use policies or decisions influencing housing supply constraints, including direct residential growth controls, or local resistance to housing development. Housing issues are often avoided or planned for in a future, rather than immediate, planning period. This underscores the entrenched nature of the housing side of the problem. The potential for the success of strategies that may be approved at a regional level is undermined without identifying the particulars of where, how soon, how much, etc.

  It is not likely that voluntary efforts alone can succeed in making more housing, or more affordable housing, available in areas where jobs-housing imbalance is characterized by severe insufficient housing supply or affordability/worker mismatches. The IRPs did not directly confront this matter even relative to the context of the existing regulatory framework for housing planning. For example, the regional housing need allocation process and housing element updates were not proposed as prospective venues for improving jobs-housing imbalance within their region. This is, however, an inter-jurisdictional planning effort already administered by the COGs for the updating of local general plans. In fact, while acknowledging serious housing shortfalls within the region in their IRP project, one of the COGs (apart from their IRP project) petitioned the Department for significant reduction of their regional housing need allocation requiring their city and county members to plan for more housing.

- **Incentives for implementation and ongoing planning support are necessary.** Carrots are needed to motivate voluntary local implementation of significant land-use changes necessary to achieve outcomes of regional benefit. The COGs that are continuing these efforts are generally MPOs which are planning to use their regional transportation planning (RTPs) processes and criteria. In these cases, they are proposing to allocate transportation funds in a manner rewarding projects that incorporate desired land-use actions. In other cases, funding is being sought for specific components of a strategy, such as outreach and education. It has been difficult, however to identify other prospective sources of funding to further inter-jurisdictional planning.

INDIVIDUAL IRP REPORTS

ASSOCIATION OF MONTEREY BAY AREA GOVERNMENTS (AMBAG) IRP[40]

Project Description

Elected officials of jurisdictions in Santa Clara County met with the Board of Directors of AMBAG on November 27, 2000 to begin an ongoing dialogue about regional issues. A statement of purpose was formulated and approved at this historic Partnership Forum, and a schedule was set for regular meetings. In support of the collaborative activities of this IRP Forum, and to continue moving the forum in a positive direction, AMBAG and Santa Clara County were awarded funds as a "Developing Inter-Regional Partnership."

AMBAG worked collaboratively with ABAG to collect data to develop an integrated GIS for the IRP project. This study of the developing IRP focused upon economic growth issues over the next 20 years, involving jobs-housing relationships between Monterey, San Benito, Santa Clara and Santa Cruz counties. The major issues facing the region are:

- Increasing commute traffic;
- Substantial employment growth without commensurate housing production;
- High Silicon Valley housing costs; and,
- Relatively lower-cost housing in Monterey County than to the north.

This IRP study created an opportunity for the four counties to positively review issues each were individually facing. Through these meetings, recommendations were made that identified ways to collaborate at local, regional and State levels to encourage more housing choices in areas rich in jobs, and more job creation in predominantly residential communities.

Existing Conditions

Lack of Housing Affordability and Traffic Congestion: In 2000, traffic congestion was a mix of Level of Service (LOS) E and F (F representing the heaviest congestion and lowest LOS) in the Monterey Bay Area, with all congestion levels being at LOS F in Santa Clara County.

Throughout the IRP's study area, median income levels are not sufficient to purchase median priced homes. Some of the nation's least affordable housing markets are part of the study area, indicating the severity of housing affordability challenges. Therefore, both the Monterey Bay Area counties and Santa Clara County share the critical need to produce additional housing in a range of affordability levels.

[40] *http://www.abag.ca.gov/planning/interregional/stateirp/monterey-silicon_valley.htm*

Study Area Counties: Monterey, San Benito, Santa Clara, Santa Cruz, including 33 cities

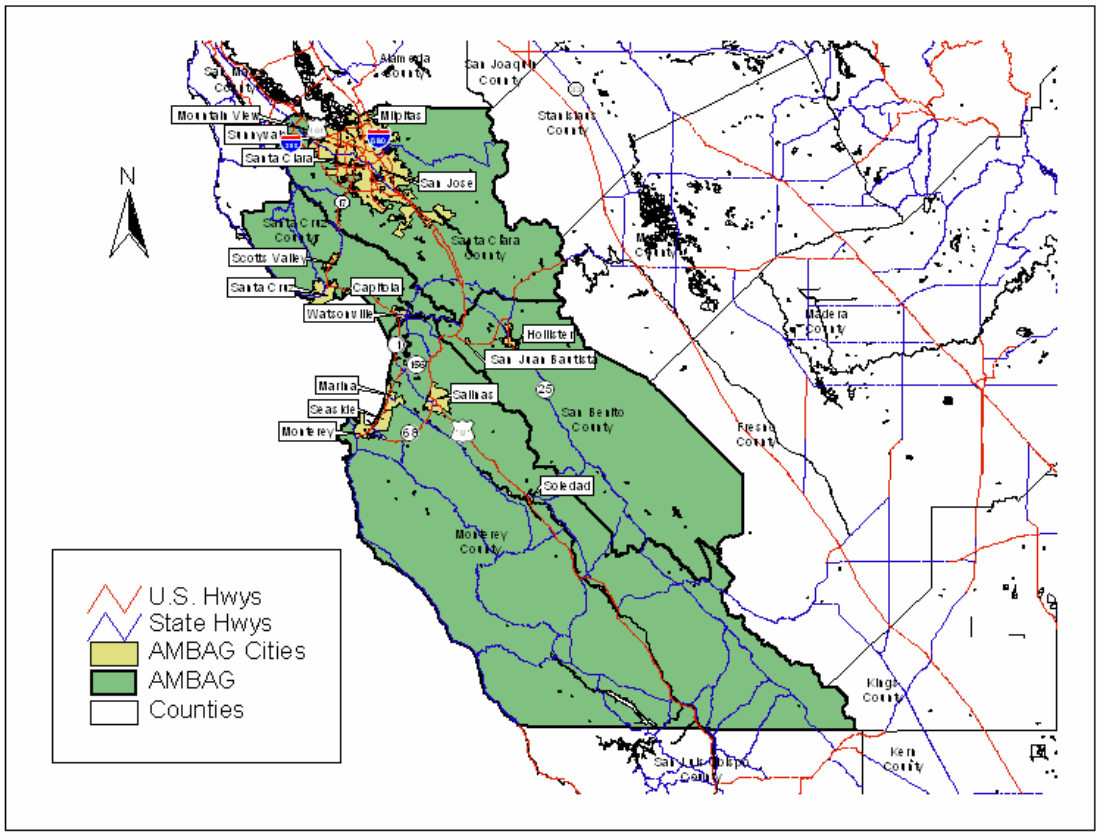
Total Population 2004: 2,470,197

Total Households 2004: 823,156

Square Miles: 6,447

Major Highways: US Hwy 1, US Hwy 101, Hwy 17, Hwy 68

AMBAG IRP Study Area



Population: The total population of the study area was 2.39 million in 2000.

- Santa Clara County jurisdictions represented 70 percent of the total study area population, with 1.68 million residents.
- The tri-county Monterey Bay Area (the Central Coast counties of Monterey, San Benito and Santa Cruz)[41] is 708,000.

Housing: The study area's household count in 2000 was 809,700:

- Santa Clara County 565,000 (70 percent).
- Monterey Bay Area 244,700 (30 percent).

Jobs: In 2000, the study area reported a 1.38 million job base:

- 1.09 million jobs (79 percent) were located in Santa Clara County.
- 290,200 jobs (21 percent) were in the Monterey Bay Area (Monterey, San Benito and Santa Cruz counties).

Gap between Jobs and Housing: The Monterey Bay Area's job to housing ratio was 1.19 jobs per household in 2000. Santa Clara County jurisdictions jobs per household ratio was 1.93:1. Only three market areas approximated a theoretical ratio of 1.5 to 1 in 2000:

- Watsonville area (1.45:1),
- San Jose (1.55:1), and
- Cities of Morgan Hill and Gilroy combined as one market area (1.47:1).

In 2000, there appeared to be low ratios of jobs to households in the areas of:

Job Ratios for AMBAG 2000[42]

Aptos	0.67:1	Rancho San Juan	0.96:1
Carmel Valley	0.85:1	San Benito County	0.75:1
Felton / North Coast of Santa Cruz Co	0.45:1	Unincorporated area of Santa Clara County	0.89:1
Fort Ord	0.92:1	Seaside/Sand City	0.98:1
Marina	0.84:1	Saratoga/Monte Sereno Area	0.71:1
North Monterey Co. Area	0.73:1		

[41] Association of Monterey Bay Area Governments, *Application for Inter-Regional Partnership Grant*, March 9, 2001, Pg. 2.
[42] Association of Monterey Bay Governments, *Monterey Bay Area – Silicon Valley Inter-Regional Partnership Study Phase V – Final Report and Implementation Plan*, November 17, 2003, Pg. 7.

Several areas within Santa Clara County have jobs dominate relative to households. In 2000, the Palo Alto/Los Altos and Los Altos Hills area (3.07:1), the Mountain View/Sunnyvale area (2.39:1), the Santa Clara/Cupertino area (3.19:1), Milpitas (2.93:1), and Santa Clara County overall (1.93:1) had significantly high ratios. [43]

Some areas will see a slowing or reversal of disproportionate ratios by 2020, but for the most part a gain overall in jobs relative to households is projected. Overall, the four-county study area is projected to remain at a ratio of 1.71 jobs to 1 household in 2020, the same ratio as in 2000.

Constraints and Opportunities Affecting Jobs-Housing Balance (External Factors)

The report analyzed a variety of environmental, economic, political and land-use factors to consider in establishing objectives and strategies for the creation of jobs and housing.

1. Physical: Approximately 55 percent (3,556 square miles) of the study area is affected by physical environmental features that may influence jobs-housing balance strategies. These include excessive slopes (30 percent, except 25 percent in north Monterey County and the Coastal Zone of Monterey County); 100-year flood zones; wetlands; sensitive habitat; the Alquist-Priolo Fault Zone; farmland of statewide importance/unique farmland and farmland of local importance; public lands; or multiple constraints. The 3,556 square miles, referenced above, does not include urbanized lands.

2. Economic: Numerous economic constraints affect the dynamics of jobs-housing balance in the area; generally falling into two categories: fiscal factors and marketplace limitations. Relevant fiscal factors include the State and local financing structure; insufficient funding for community and regional infrastructure (comprising water supply and quality, transportation improvements and social infrastructure such as libraries, schools and parks); and reduced federal incentives to build multifamily housing. Marketplace limitations affecting all or portions of the study area include high real estate prices; fluctuations in venture capital investment; obstacles to job creation and business expansion; lending practices for mixed-use development; liability insurance for construction defects, and fluctuations in retail sales and sales tax revenues. The region experienced a significant decline (32.9 percent) in sales tax in 2000-2001, during the downturn in the technology sector.

   Political factors affecting jobs-housing balance were examined, including conflicting State laws and guidelines; local growth management initiatives, and community opposition. The table on page 26, indicates the counties of Santa Cruz and Santa Clara, as well as 22 other jurisdictions have some method of growth control.

3. Land-use constraints: Local land-use controls and the physical ability of a community to build out, also have an influence on jobs-housing balance issues. Understanding these considerations is essential to the process of identifying a realistic series of actions that could benefit the current imbalances in jobs and housing at regional and local levels.

[43] Ibid, Pg. 7.

Constraints by County: Monterey Bay Area - Silicon Valley IRP[44]

County	Environmental Constraints	Acres	Square Miles	Percent of Total County Area
Monterey County	Excessive Slopes (25% in Coastal Zone and North County; 30% elsewhere)	453,405.3	708.4	21.4
	100 Year Flood Zone	48,866.6	76.4	2.3
	Wetlands	1,363.1	2.1	0.1
	Alquist-Priolo Earthquake Fault Zone	11,125.7	17.4	0.5
	Farmland of Statewide Importance, UniqueFarmland, and Farmland of Local Importance	149,117.4	233.0	7.0
	Parks, Open Space, Public/Quasi-Public Lands	203,539.2	318.0	9.6
	Multiple Constraints	476,077.9	743.9	22.5
	Urbanized Lands	36,900.1	57.7	1.7
	None of the Above Constraints	739,336.8	1,155.2	34.9
	Total	2,119,732.1	3,312.1	100
San Benito County	Excessive Slopes (30%)	272,659.1	426.0	30.6
	100 Year Flood Zone	16,124.8	25.2	1.8
	Wetlands	653.6	1.0	0.1
	Alquist-Priolo Earthquake Fault Zone	16,858.8	26.3	1.9
	Farmland of Statewide Importance, Unique Farmland, and Farmland of Local Importance	53,974.1	84.3	6.1
	Parks, Open Space, Public/Quasi-Public Lands	41,445.5	64.8	4.7
	Multiple Constraints	83,490.0	130.5	9.4
	Urbanized Lands	5,681.5	8.9	0.6
	None of the Above Constraints	399,134.3	623.6	44.8
	Total	890,021.6	1,390.7	100
Santa Cruz County	Excessive Slopes (30%)	76,795.3	120.0	26.9
	Year Flood Zone	1,748.2	2.7	0.6
	Wetlands	448.8	0.7	0.2
	Alquist-Priolo Earthquake Fault Zone	4,122.0	6.4	1.4
	Farmland of Statewide Importance, Unique Farmland, and Farmland of Local Importance	14,092.4	22.0	4.9
	Parks, Open Space, Public/Quasi-Public Lands	28,404.8	44.4	9.9
	Multiple Constraints	59,509.6	93.0	20.8
	Urbanized Lands	20,646.1	32.3	7.2
	None of the Above Constraints	79,811.0	124.7	27.9
	Total	285,578.3	446.2	100
Santa Clara County	Excessive Slopes (30%)	209,222.8	326.9	25.2
	100 Year Flood Zone	7,871.8	12.3	0.9
	Wetlands	547.6	0.9	0.1
	Alquist-Priolo Earthquake Fault Zone	7,672.2	12.0	0.9
	Farmland of Statewide Importance, Unique Farmland, and Farmland of Local Importance	24,264.4	37.9	2.9
	Parks, Open Space, Public/Quasi-Public Lands	47,347.1	74.0	5.7
	Multiple Constraints	176,092.6	275.1	21.2
	Urbanized Lands	137,488.9	214.8	16.6
	None of the Above Constraints	219,195.2	342.5	26.4
	Total	829,702.4	1,296.4	100

[44] Association of Monterey Bay Area Governments, *Monterey Bay Area — Silicon Valley Inter-Regional Partnership Study Phase III*, November 15, 2002, Pg. 7.

Areas with Urban Growth Boundaries, Urban Limit Lines or Caps to Growth[45]

Jurisdiction	Initiative	Enactment	Duration	Description
Greenfield	Considering SofI Amendment with LAFCO to establish a growth limit line to not grow east of 2nd St. (Prime Ag)	Draft only.	No duration decision	Would prohibit growth east of 2nd St., due to location of prime agricultural land.
King City	Annexation of Meyer-Mills property (LAFCO)	LAFCO decision; 2002	In perpetuity	Creates an agricultural easement buffer zone on side of the annexation. Area to the so. has an agricultural conservation easement.
Marina	Measure "A" - Urban Growth Boundary	Voter Initiative, 2000.	2020	Initiative imposes an urban growth boundary which coincides with current City limits but is within the City's Sphere of Influence. Measure precludes annexation and returns control over development to Monterey County.
Hollister	Growth Cap	Voter Initiative, November 2002	5 yrs or until infrastructure improvements are made	Initiative limits growth to 240 units per year.
San Juan Bautista	Urban Growth Boundary (City Council Adoption); Residential Dwelling Control System (Growth Control Measure) (City Council Adoption)	UGB-1979; Growth Control Measure-1980-2000; amended in 2002	20 year.	The Urban Growth Boundary requires a vote to extend its duration. The Residential Dwelling Control System put a cap not to exceed 3% on dwelling units (8.5/yr.). The City Council in 2002 amended the System to reduce the permits for new units to 1% (4/yr.).
San Benito County	General Plan (GP) Procedures Ordinance Growth Management Measure (Board of Supervisors)	GP Procedures Ord 1998. Growth Management Measure-2000. Both can be amended by the Board of Supervisors	No limits on duration	The GP Procedures Ordinance prohibits wholesale increase of density greater than 100% of the original density. The Growth Management Measure puts an annual 1% cap on growth.
Santa Cruz	Measure "O" - Growth	1980 Voter Initiative	Has expired	Placed a 1.5% annual growth cap within City limits.
Watsonville	Measure "U" - Urban Growth Boundary	Voter Initiative, November 2002	20 to 25 years, depending on area	Used as mechanism to allow commercial, industrial, residential and workforce housing within City's jurisdictional boundaries. No cap on units or by percent
Santa Cruz County	Measure "J"-Growth Control Measure	1978 Voter Initiative	In perpetuity	Allowed different growth rates for the overall county area, within Urban Service Lines and in rural areas. Caps have ranged from 2.4% to .5% (in the last 2 years)
Campbell	Yes	In process	In process	In process
Cupertino	Yes	In process	In process	In process
Gilroy	Yes	In process	In process	In process
Los Altos	Yes	In process	In process	In process
Los Altos Hills	Yes	In process	In process	In process
Los Gatos	Yes	In process	In process	In process
Milpitas	Yes	In process	In process	In process
Monte Sereno	Yes	In process	In process	In process
Morgan Hill	Yes	In process	In process	In process
Mountain View	Yes	In process	In process	In process
Palo Alto	Yes	In process	In process	In process
San Jose	Yes	In process	In process	In process
Santa Clara	Yes	In process	In process	In process
Saratoga	Yes	In process	In process	In process
Sunnyvale	Yes	In process	In process	In process

[45] Association of Monterey Bay Area Governments, *Monterey Bay Area — Silicon Valley Inter-Regional Partnership Study Phase III*, November 15, 2002, Pg. 17-18.

Findings[46]

Major findings regarding the effects of anticipated growth are presented below. The baseline year is 2000. Horizon years generally range from 2020 (population, jobs and households) to 2025 (transportation). Horizon years vary by local jurisdiction for land-use, and are not available for certain socio-economic and transportation factors.

1. **The population of Monterey, San Benito, Santa Cruz and Santa Clara counties is projected to grow by more than 537,000 persons by the year 2020, an increase of 22 percent.**

   By 2020, the population in the four-county study area is projected to reach 2,928,400, up from 2,391,390 in 2000.

   - Santa Clara County – increase to over 2 million residents in 2020 (68 percent of the total population).
   - City of San Jose – to grow to over 1,069,200 residents (36 percent of the total population).
   - Fort Ord area – increase to 37,370 residents in 2020 (188 percent increase).
   - Rancho San Juan area north of Salinas – increase from 7,430 residents to 17,540 residents (136 percent increase).
   - Morgan Hill/Gilroy area – increase from 75,020 residents to 115,400 residents, (54 percent increase).

2. **311,550 new jobs are projected to be added in the study area by 2020, with one-third of those jobs located in San Jose, at a rate consistent with population growth.**

   - 311,550 new jobs are forecasted – total of 1,694,120 jobs (22.5 percent increase).
   - 103,900 are projected to be located in San Jose.
   - 62,500 new jobs (22 percent) are projected to be added in the Monterey Bay Area.
   - The cities of Mountain View, Sunnyvale, Santa Clara and Cupertino are projected to see an increase of 82,840 jobs.
   - Fort Ord (from 3,060 to 6,460 jobs).
   - Rancho San Juan (from 2,300 to 4,000 jobs).
   - Morgan Hill/Gilroy area (from 33,310 to 55,190 jobs).

[46] Association of Monterey Bay Area Governments, *Monterey Bay Area - Silicon Valley Inter-Regional Partnership Study Phase 2 Report Analysis of Anticipated Growth In Monterey, San Benito, Santa Cruz and Santa Clara Counties 2000-2025,* August 2002, Pg. 7-11.

3. Population density is projected to increase along transportation corridors and in designated rural and urban growth areas by 2020.

By 2020, changes in density are projected to occur along transportation corridors in particular, and in areas designated for significant new residential development. In the Monterey Bay Area, population density is projected to at least double in areas near King City, Greenfield and unincorporated Chualar in south Monterey County, in portions of the Sand City/Seaside and Marina/Fort Ord areas, and in several areas near Salinas. In San Benito County an increase in population density is projected in the Hollister area. Santa Cruz County is projected to increase in density in portions of Watsonville and City of Santa Cruz. Density increases in Santa Clara County are apparent in the Morgan Hill area and in the urban core of San Jose. Some of these population growth areas, such as San Jose, the Marina/Fort Ord area and the Rancho San Juan area north of Salinas are projected to also see significant job growth by 2020.

4. Santa Clara County is projected to continue as an extensive job center, with more than three times the number of jobs in the Monterey Bay Region, but only two times as many households.

Although Santa Clara County jurisdictions are projected to gain 108,550 new households by 2020, the County's jobs/household ratio is projected to increase to 1.99:1 jobs per household, up from 1.93:1 in 2000.

- Santa Clara County is projected to have 1,341,430 jobs and 674,410 households in 2020 (or a ratio of approximately 2.0 jobs per household).
- Monterey Bay Area is projected to have 352,690 jobs and 313,710 households by 2020 (a ratio of 1.12 jobs per household, close to the 2000 ratio of 1.91:1).

5. Jobs to household ratios are projected to remain stable in the study area as a whole, indicating the challenge of improving jobs and housing balances at regional and local levels.

Looking at the study area as a whole, the overall ratio of jobs to households in the four counties is not projected to change over the next 20 years. Using a standard of 1.5 jobs per household as a theoretical jobs-housing measure of comparison, if current growth and development patterns continue, there are projected to be 1,694,120 jobs and 988, 120 households overall, continuing an imbalance of 1.71 jobs per household. Some regional sub-areas such as Seaside/Sand City, Saratoga/Monte Sereno and the unincorporated area of Santa Clara County are projected to move toward a theoretical balance of jobs to households by 2020. For the most part however, areas with a disproportionate relationship between jobs and households are projected to remain the same.

6. Throughout the study area, median income levels are not sufficient to purchase median priced homes.

Housing prices have, for the most part, continued to escalate throughout the area from 2000 through the first quarter of 2002 with the sharpest increase occurring in Monterey County where prices rose from $345,000 in 2000 to $375,000 by the end of the first quarter of 2002. Median area incomes ranged from $52,600 to $87,300 by county, and are not sufficient to buy the median priced homes in each county. For example, a family with a median income of $52,600 would need an additional $87,000 to be able to purchase a $340,000 home. According to Census 2000 data, 13 jurisdictions, all located in Monterey or San Benito counties, had median household incomes of less than $50,000. Those areas also have the highest percentage of persons age 0 to 14, and the lowest levels of educational attainment for persons 25 years and older. While forecasts of income and housing prices are not available, the disparities described are expected to continue in the future.

7. The nation's least affordable housing markets are part of the study area, indicating the severity of housing affordability challenges faced by local jurisdictions.

Housing affordability in the study area continues to decrease each year, with less than 20 percent of residents of median income now able to afford a median priced home. According to the National Association of Home Builder's *Housing Opportunity Index*, in the first quarter of 2002:[47]

- Monterey County ranked as the least affordable area in the nation for affordability with only 7.7 percent of homes being affordable to families of median income.
- Santa Cruz County came in as the second least affordable area in the nation where only 8 percent of families of median income could afford a home.
- Santa Clara County ranked as the seventh least affordable area with 20.1 percent of median income families being able to afford a home.

While forecasts of affordability are not available, the recent trends described are expected to continue into the future.

8. Educational attainment is projected to be key to income levels, housing choices and job mobility throughout the study area.

In areas such as Los Altos, Los Altos Hills, Monte Sereno and Palo Alto, where more than 70 percent of residents 25 years and older have a bachelor's degree or a more advanced degree, median household income was as much as five times greater than agricultural areas in Monterey County such as Gonzales, Greenfield, Soledad and Watsonville with large percentages of persons with less than a ninth grade education. Per capita income in areas with higher percentages of college-educated persons was as much as ten times higher than per capita income for areas with higher ratios of persons who did not continue into high school. Higher levels of educational attainment are linked to higher salaries and more

[47] Note: HOI reported in January 2005, the Salinas MSA was ranked the least affordable in the country.

access to technology, thus providing greater access to resources in terms of housing choices and job mobility. While forecasts regarding these factors are not available, the patterns described are expected to continue in the future.

9. While jurisdictions in the study area are faced for the most part with addressing the housing needs and choices of an aging population, some are addressing the needs of a relatively young population.

In 2000, 486,190 persons or 17.5 percent of the total study area population were 55 years or older. By 2020, that age cohort is projected to represent 27 percent of the population with almost 790,700 persons. A growing retirement age population has implications for local housing markets with respect to needs and choices in staying in current homes, moving locally or leaving the area. The largest age cohort in 2000 in the four-county area is persons ages 25 to 54, making up 47.3 percent of the population. By 2020 that age cohort are projected to represent only 40 percent of the population.

In 2000, while the age cohort of 0 to 14 year olds made up 21.4 percent of the area's population, there were heavy concentrations of younger persons in cities with a relatively low median age, such as Gilroy (27.6 percent), Watsonville (28.6 percent), King City (29.7 percent), Soledad (31.1 percent), Gonzales (31.7 percent), and Greenfield (32.2 percent). This reflects a growing population of younger persons working in sectors of the economy which do not pay well and living in areas of lower median income that substantiates a continuing concern regarding the ability to obtain housing.

10. Employment sectors with disparate or lower wages are project to remain strong in all four counties, presenting continued issues of lower incomes and difficulties in affording housing costs.

Services employment, including hotels, personal, business, repair, recreational, health, educational, legal and others are projected to increase throughout the study area by 2020, but at a greater rate of change in the Monterey Bay Area. Because salaries in service employment vary widely, employees with more highly paying business service positions are projected to fare better than those in services sectors offering lower wages. This disparity of service wages runs throughout the study area. Jurisdictions with more persons working in management or professional services have a correspondingly higher level of median income. Agriculture is projected to also continue to be a strong employment sector in the Monterey Bay Area, bringing with it the issues of lower incomes and the ability to make ends meet in an area with high housing costs.

11. Residence adjustment "leakage", an indicator of persons living in one county and working in another county, is projected to increase in Santa Clara County and is projected to decrease in Monterey Bay Area counties.

Residence adjustment, the net amount of personal income of persons residing in a specific geographic area but receiving income outside that geographic area, is projected to reflect a significant imbalance in the study area by 2020. Santa Clara County is projected to see a negative residence adjustment of $15 billion in 2020, up from $9 billion in 2000. The Monterey Bay Area is projected to see a positive adjustment of $2.7 billion up from $1.8 billion in 2000. This "leakage" is linked to increasing numbers of persons who live in one county but work in another.

12. Although recent activity has been unstable, taxable retail sales are projected to increase by 44 to 91 percent in all four counties by 2020.

Growth in local retail sales tax is an indicator of a healthy local economy, which allows residents to spend locally, and reduces "leakage" to surrounding areas. In spite of the recent downturn in the economy in the IRP study area, long-term forecasts of total retail sales show increases of between 10 and 20 percent from 2000 to 2005. Over the next 20 years, projected increases in taxable sales vary from 44 to over 91 percent, with an increase of close to 47 percent in the four-county study area.

13. The number of commuters traveling from homes in other counties to work in Santa Clara County are projected to increase dramatically by 2025, indicating a continued imbalance at regional and local levels to locate housing in proximity to jobs.

By 2025, there are projected to be striking increases in daily county-to-county commute patterns as represented by forecasted demand and unrestrained transportation capacity:

- Santa Clara County is projected to have over 312,000 commuters coming in for work from all areas, a 36 percent increase from 2000 (75,300 are projected to come from the Monterey Bay Region, an increase of 80 percent).
- The increase from Santa Cruz County to Santa Clara County is projected to be about 50 percent (+15,100).
- Large increases in commuters from San Benito County to Santa Clara County (+10,800 since 2000) are projected.
- Increases are projected from Monterey County to Santa Cruz County (+9,450 since 2000).
- In contrast, only 13,900 commuters are projected to come from Santa Clara County to the three Monterey Bay Area counties.

14. Traffic conditions are projected to worsen throughout the four counties by 2025, even with planned transportation improvements.

Commuting to and from work is currently a widespread challenge in Santa Clara and Santa Cruz counties, and on some roadway segments in Monterey and San Benito counties. Conditions in all four counties are projected to be worse in 2025, even with planned improvements to the transportation system (see figure on page 34).

In 2000, congestion was a mix of LOS E and F in the Monterey Bay Area, with all congestion being at LOS F in Santa Clara County. By 2025, congestion is projected to worsen in many areas, with some improvements in areas where major funded capacity-improving projects are located.

- Average travel speed is projected to decrease overall from 2000 to 2025 with a drop of as much as 26 percent on highways and 11 percent on major arterials and freeways.
- Traffic congestion is projected to increase despite planned transportation projects that are projected to increase the capacity of roadways.
- The rate of growth in daily VMT an increase of 31 percent overall) is expected to exceed the growth in the number of trips (30 percent increase overall), meaning that vehicle trips are projected to get longer.

Worsening traffic conditions translates into greater losses in productivity and longer commutes.

15. Transportation impacts on air quality are improving in the study area.

Reactive Organic Gases (ROG) emissions from vehicles and Nitrogen Oxides (NOx) emissions are forecast to remain in compliance with State and federal air quality allowable emissions. Beginning with three times as much NOx emissions as the Monterey Bay Area, Santa Clara County levels are projected to decrease to about the same level as the Monterey Bay Area by 2025. This improvement is attributed to the rise of newer, cleaner vehicles that pollute less. ROG emissions are projected to not increase significantly in the 25-year period.

16. 177,510 new households are projected to be formed in the study area by 2020, at a growth rate consistent with population and jobs.

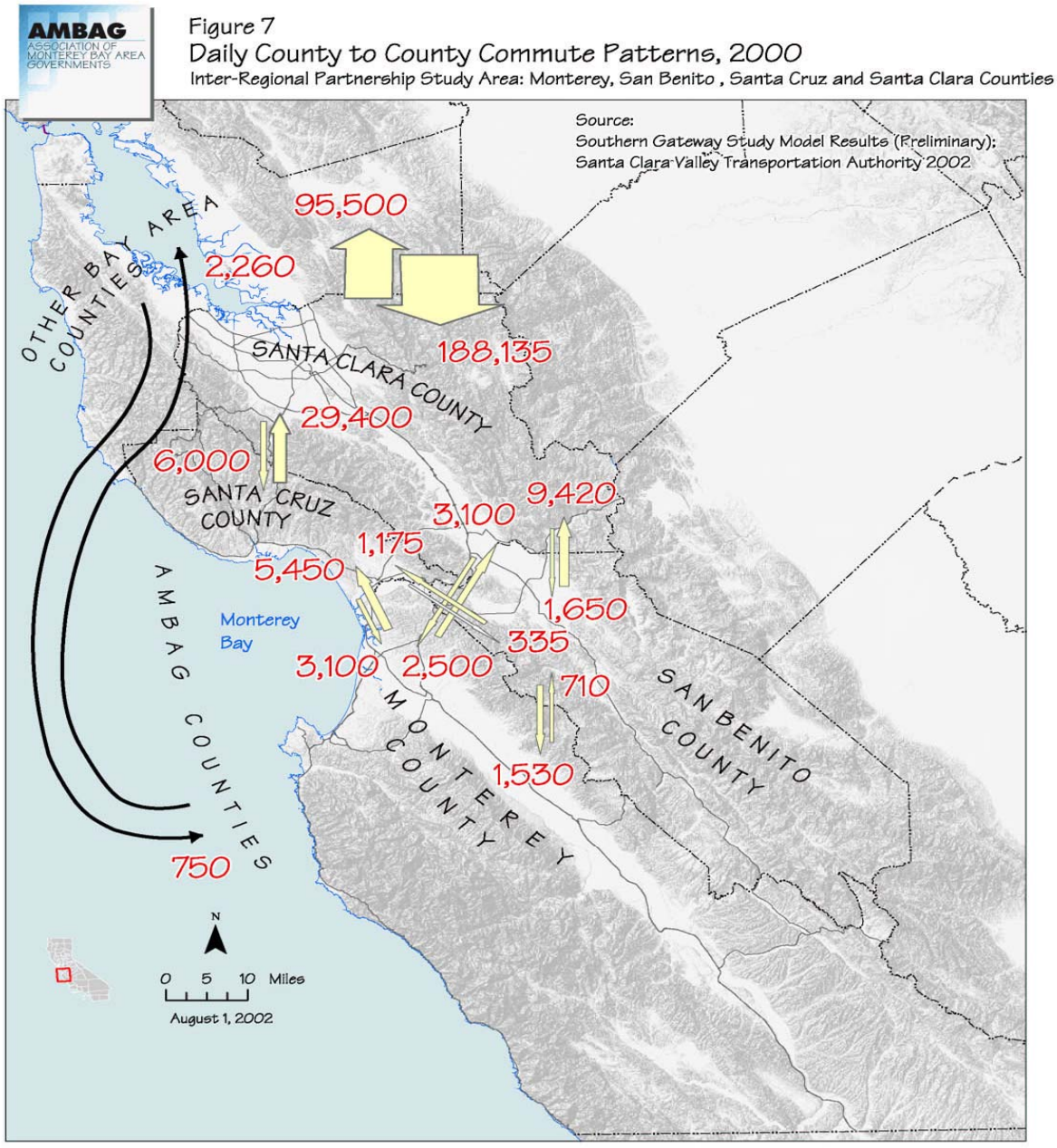
The overall number of households is projected to increase 22 percent to 988,120 in 2020.

- Santa Clara County jurisdictions are projected to have a total of 674,410 households by 2020, up from 565,860 in 2000, 61 percent of the new households (108,550) are projected to be formed in Santa Clara County;
- Monterey Bay Area jurisdictions are projected to have a total of 313,710 households up from 244,740 in 2000, 39 percent additional households (68,960) are projected in Monterey, San Benito and Santa Cruz counties.
- San Jose is projected to have 334,700 households and accommodate more than 33 percent of the total study area households.

Significant increases in new households are projected to occur in areas with major population increases:

- Fort Ord (3,310 households in 2000 to 11,680 in 2020, an increase of 253 percent);
- Rancho San Juan (2,400 households to 5,680, an increase of 137 percent); and Morgan Hill/Gilroy area (22,720 households to 34,740, a 53 percent increase).

These areas are projected to add 23,670 new households, representing 13 percent of all new households in the four-county study area. In San Benito County, jurisdictions are projected to add over 11,990 new households by 2020 (62 percent increase).



Monterey Bay Area-Silicon Valley Inter-Regional Partnership Study

Figure 7 – Daily County to County Commutes is from Monterey Bay Area – Silicon Valley IRP Study Phase 2 Report, anticipated growth in the four county areas, 2000, Pg. 54 and 55.

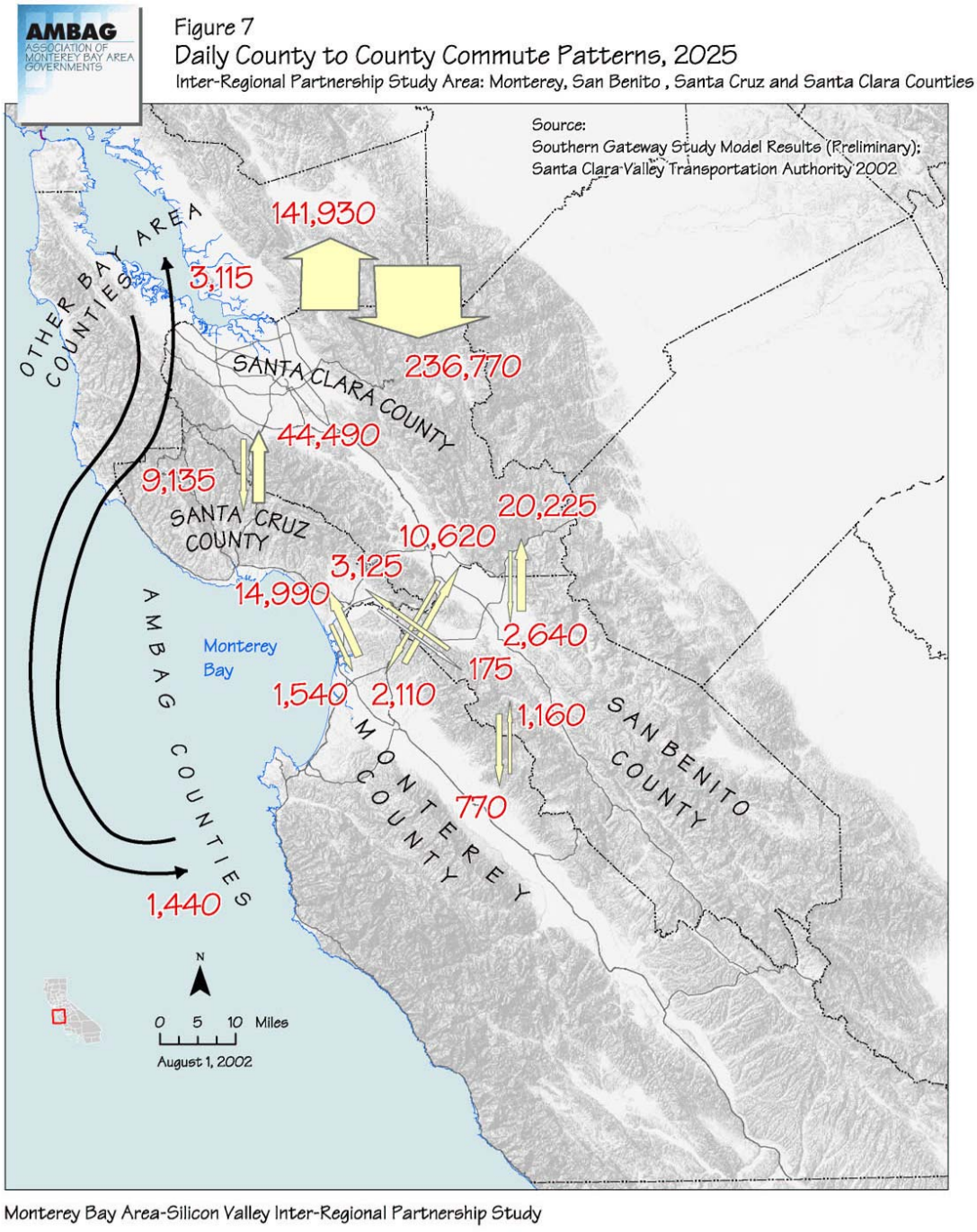


Figure 7 – Daily County to County Commutes is from Monterey Bay Area – Silicon Valley IRP Study Phase 2 Report, anticipated growth in the four county areas, 2025, Pg. 54 and 55.

Description of Projected Gap Between Jobs and Housing in the Study Area, 2000–2020

The Monterey Bay Area's job to housing ratio is expected to decline from 1.19 jobs per household in 2000 to 1.12 jobs per household in 2020. Over the same period the housing production rates in Santa Clara County's employment centers are projected to continue to fall short of the need generated by new jobs. Although Santa Clara County jurisdictions are projected to gain 108,550 new households by 2020, the County's jobs-household ratio is projected to increase to 1.99:1 jobs per household, up from 1.93:1 in 2000.

Population and household growth rates are projected to continue to be highest in the Monterey Bay Area and southern Santa Clara County. However, the Monterey Bay Area's growth of jobs is projected to not keep pace with those relatively high population and household growth rates. The Monterey Bay Area's job to housing ratio is expected to decline from a ratio of 1.19 jobs per household in 2000 to 1.12 jobs per household in 2020. Initiatives that emphasize additional job growth, with good salaries, are essential to improving the balance of jobs and housing in the three Monterey Bay Area counties. Job growth is expected to slightly outpace household growth in southern Santa Clara County. [48]

In summary, the three Monterey Bay Area counties are expected to continue a basic pattern of low jobs to household ratios and Santa Clara County will continue to have a high number of jobs relative to households. Some changes, mostly toward more balanced ratios, will occur in individual communities and market areas. [49]

Role of Public Participation

Primary public input came from the diverse group of stakeholders on the study's Advisory Committee. In addition to the monthly policy and planning meetings held to develop the IRP's strategies, there were also several steps taken to solicit public input. Presentations concerning the study were made upon request at public meetings of City Councils and Boards of Supervisors in the two regions. Also, the study was presented upon request to a technical advisory committee of the Transportation Agency of Monterey County, and at a public meeting of the American Planning Association/Association of Environmental Professionals in Watsonville. Public comment was also invited through the study's interactive website.

[48] Association of Monterey Bay Area Governments, *Monterey Bay Area - Silicon Valley Inter-Regional Partnership Study Phase 2 Report Analysis of Anticipated Growth In Monterey, San Benito, Santa Cruz and Santa Clara Counties 2000-2025,* August 2002, Pg. III-10.

[49] Association of Monterey Bay Area Governments, *Monterey Bay Area - Silicon Valley Inter-Regional Partnership Study Phase 2 Report Analysis of Anticipated Growth In Monterey, San Benito, Santa Cruz and Santa Clara Counties 2000-2025,* August 2002, Pg. III-10.

Study Objectives and Strategies[50]

The study's objectives and strategies are intended to address the complex dynamics of neighboring regions. The strategies respect local and regional differences and autonomies. The focus is on opportunities for collaborative regional initiatives and state level advocacy, organized by objective and timeline. Also identified are local strategies that may be considered by individual jurisdictions, depending on local conditions and interests.

Collaborative Regional Strategies are centered on four objectives:

- Housing Choices – Create more workforce housing, in a range of affordability levels, near job centers and transportation in the IRP area.
- Job Growth – Create job growth and business expansion opportunities near housing centers in the IRP area.
- Smart Growth and Resource Conservation – Create more efficient land-use and transportation patterns, while protecting the environmental vitality of the IRP area.
- Public/Private Partnerships – Establish or maintain public/private sector partnerships to identify create and support a regional revenue plan, public education plan and other implementation activities of the IRP program.

State Advocacy Strategies are centered on two objectives:

- Fiscal Reform and Incentives – Realign the State and local fiscal relationship.
- Regulatory Reforms – Achieve regulatory reforms. Collaboration on state legislative actions is projected primarily to occur as part of each jurisdiction's contacts with existing advocacy groups.

Local Strategies are centered on the following six objectives:

- Housing Production – Create more local housing production near local job centers and transportation facilities.
- Housing Affordability – Create a range of local housing affordability options near local job centers.
- Job Growth – Create local job growth and business expansion near local housing centers.
- Smart Growth and Resource Conservation – Create more local mixed-use, compact land development and efficient transportation patterns, and preserve local open space.
- Fiscal Reform and Incentives – Realign the State and local fiscal relationship.
- Regulatory Reforms – Achieve regulatory reforms. Collaboration on state legislative actions is projected primarily to occur as part of each jurisdiction's contacts with existing advocacy groups.

[50] Ibid, Pg. I-3.

Immediate (within the next six months)

This IRP identified three key immediate strategies in addition to short- and long-range strategies. The immediate strategies are:

Continue the cooperative effort of local jurisdictions to direct development to cities by equitably transferring fair-share housing requirements to cities and urban centers of unincorporated areas and promoting "city-centered mixed-use" growth.

- Support existing and future sub-regional and regional efforts.
- Establish county-level housing trust funds for local workforce housing development in the tri-county Monterey Bay Area (i.e., Housing Trust Fund in Santa Clara County).
- Support sub-regional initiatives to establish housing trust funds, such as the current effort of the Fort Ord Reuse Authority.
- Encourage these capital funds to offer housing subsidies or income tax credits to encourage residents to live near their jobs.
- Continue to implement, throughout Santa Clara County, the Measure A Initiative for Affordable Homes (1998). This measure relaxes historic Article 34 restrictions on the ability to build affordable, publicly-funded housing projects without voter approval. [51]

Establish stronger connections between regional and State Workforce Investment Board activities and local economic development activities.

- Support the critical competitive advantage of the proximity of employers to trained workforces in Silicon Valley and the Monterey Bay Area. Direct Investment Board funds toward a balance of two objectives: (1) job growth and business retention activities, and (2) assisting disadvantaged employees.
- Foster increased collaboration between workforce development partners. Organize regional stakeholders to meet a specific, critical workforce need.
- Link workforce development with community colleges and other training. Increase the recruitment of new, well paying jobs to the three Monterey Bay Area counties, and retain existing jobs in those counties, through coordination of activities by County Economic Development Corporations and Workforce Investment Boards. [52]

Short-Term (six months to two years to initiate). The short-term strategies are:

- Track affordable housing and land-use development activity at the regional level. Share and integrate this information at an inter-regional level on an ongoing basis. [53]
- Establish a strategic plan to coordinate economic development activities on a regional and inter-regional basis. Assess the feasibility of establishing regional incentives to create jobs. [54]

[51] Association of Monterey Bay Area Governments, *Monterey Bay Area - Silicon Valley Inter-Regional Partnership StudyPhase V - Final Report and Implementation Plan,* November 17, 2003.
[52] Association of Monterey Bay Area Governments, *Monterey Bay Area - Silicon Valley Inter-Regional Partnership StudyPhase V - Final Report and Implementation Plan,* November 17, 2003, Pg. 12-13.
[53] Ibid, Pg. 13.
[54] Ibid, Pg. 14.

Long-Term (two years or more to initiate). The long-term strategies are:

- Establish county or regional land-banking programs for housing development for the local workforce. Also support existing discussions of establishing land-banking programs at sub-regional or sub-county levels.[55]
- Establish a community capital funding initiative for the three-county Monterey Bay Area, seeking to mobilize market-based capital investments targeted to low-income neighborhoods. The funds operate as a vehicle for equity investments and loans for large-scale "keystone" projects.
- Establish regional venture capital funding strategies for new businesses in the tri-county Monterey Bay Area.
- Support incentives to encourage employers to hire locally and for employees to live close to their jobs.
- Develop a strategic plan for regional and inter-regional competitive positions in global marketplace.
- Direct industry to communities and regions with a concentration of housing. [56]

Evaluation of Strategies

Implementation of local strategies will depend on the particular interests and conditions of a jurisdiction. A survey conducted in January 2003 revealed that many of those strategies are already in place, or under active consideration.

Regional and State strategies selected for immediate (within six months) initiation are considered to be the most manageable, given the available local resources of in-kind staff services. Strategies with a short-term timeframe (six months to two years) require more resources, but could be started at sub-area levels. Strategies with a long-term horizon (two or more years) will require a substantial pooling of resources that are not identified at this time. The lack of State funding at this time is a deterrent to coordinated implementation of regional and State measures.

Final Internal Assessment of Outcomes – Conclusions

The Monterey Bay Area-Silicon Valley IRP Study acknowledges challenges the two regions face in working together to improve the balance of jobs and housing. It emphasizes the shared needs and collaborative opportunities to work toward the identified goal of providing more housing near job centers and jobs near residential areas. Through the process of education, understanding and face-to-face dialogue, the study has moved the two regions closer together. As the regions struggle with some of the same critical issues, they are learning from each other while providing support and coordination.

[55] Ibid, Pg. 14.
[56] Ibid, Pg. 14.

It is important to consider respective places in their larger context. Implementation of jobs and housing balance strategies are projected to take place on many fronts, often with modest starts. Jurisdictions and regions are at different starting points to begin with, and there is no source of identified funds at this time to coordinate and execute a unified, large implementation effort toward improving jobs and housing balance. Nonetheless, multiple small victories are making, and are projected to make, a positive difference. [57]

Final Note

Since the drafting of this report the voters of County of Santa Cruz, one of the areas studied in this emerging IRP, voted in the November 2004 elections on a county-wide transportation initiative, Measure J. The proposed Measure J would have levied a half-cent sales tax to improve transportation in Santa Cruz County. The proposed improvements would have included: widening Highway 1 with carpool/bus/emergency lanes; improving local streets, sidewalks and bike paths, safety on Highway 17, elderly/disabled transportation; building a coastal bike/walking path next to the rail line; and a Pajaro train station. The measure failed with less than 44 percent of the County's electorate voting for passage of Measure J.

[57] Association of Monterey Bay Area Governments, *Monterey Bay Area - Silicon Valley Inter-Regional Partnership StudyPhase V - Final Report and Implementation Plan,* November 17, 2003, P. 37.

MENDOCINO COUNCIL OF GOVERNMENTS (MCOG) IRP[58]

Project Description

The MCOG worked with ABAG and Lake County/City Area Planning Council in what became known as the Wine Country IRP. In November of 2001 MCOG began implementing the Wine Country IRP work program. The goal of the program was to identify and address jobs-housing imbalances between jurisdictions within the four counties of Napa, Sonoma, Lake and Mendocino. The policy options addressed fall into three general areas:

- Creation of employment opportunities in areas of housing concentration.
- Creation of affordable housing in areas of employment concentration.
- Reduction of access barriers between jobs and housing.

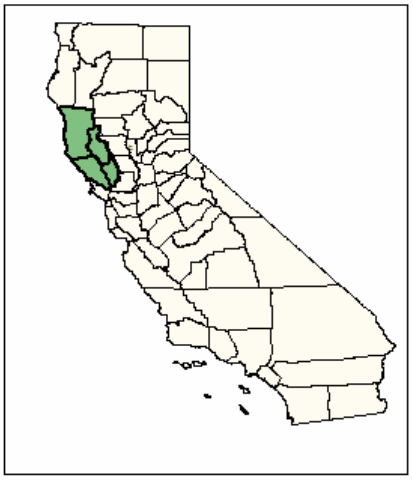
The IRP conducted a thorough process of identifying, contacting, and interviewing potential stakeholders and formed a Leadership Team to look at the issues and recommend actions. A variety of public and private sector representatives were consulted. The team met three times and a General Assembly of stakeholders was held on March 25, 2004.

In contrast with IRPs that have widespread recognition of existing jobs-housing imbalance, the four-county Wine Country area does not have an immediate, recognizable crisis associated with jobs-housing imbalance and separation. As an "Emerging or Developing IRP" the project's focus was to document the extent of the imbalances and the impacts on communities and infrastructure.

The Wine Country IRP's main work plan included:

- Developing an existing conditions background report for the four-county region;
- Identifying stakeholders and engaging them with the initial results of the analysis;
- Developing existing trends and projections to learn which problems are easing and which are being exacerbated;
- Developing a set of issues that will identify specific problems, discuss potential solutions, and recommend policies for consideration by the counties, cities, special districts, industry groups and others;
- Creating a policy group of stakeholders willing to create an ongoing forum to discuss and solve the issues raised during the earlier tasks; and
- Drafting an implementation plan to continue efforts initiated by the IRP.

[58] Mendocino Council of Governments, *Wine County Inter-Regional Partnership Final Report*, June 30, 2004. *www.mendocinocog*



Study Area Counties: Lake, Mendocino, Napa, Sonoma, including 20 cities

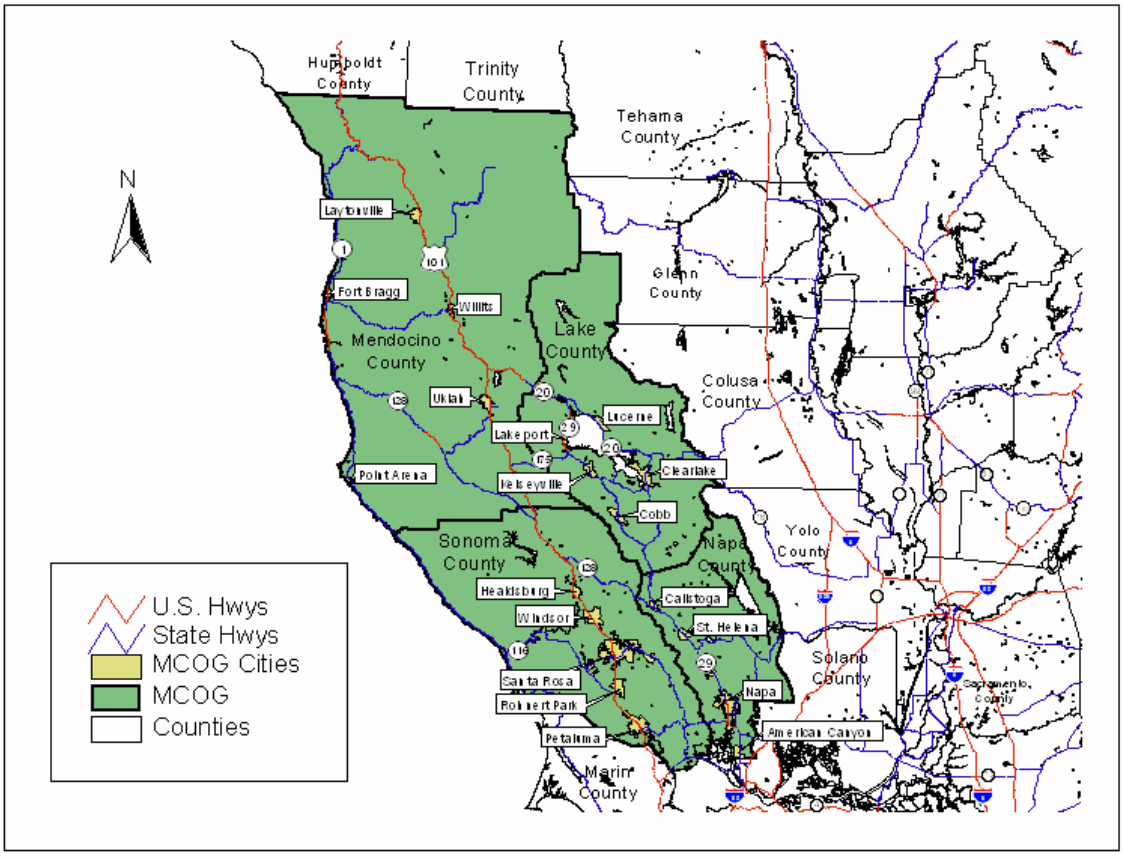
Total Population 2004: 756,781

Total Households 2004: 286,874

Square Miles: 7,097

Major Highways: US Hwy 101, Hwy 20, Hwy 29

MCOG IRP Study Area



Existing Conditions

Wage Growth and Change: In the Wine Country, the influx of high wage jobs associated with the "dot-com" boom of the late 1990s along the US-101 corridor overlaid an existing employment base dominated by low-wage jobs. With the "dot com" bust, the loss of these jobs has returned the economic base to reliance on tourism, the wine industry, retail and service sector activities.

Housing Cost Dynamics: The volatility of the Wine Country housing market is such that in 2004 the average cost of housing increased by over $100,000 in a single year. With ever-shrinking income levels based on the real value of wages, buyers look beyond jurisdictional and regional boundaries to find affordable housing that meets their needs.

Housing Affordability: The relatively low wages earned in the above sectors of the Wine Country limit the ability of workers to enter the homeownership market. The dramatic increase of housing prices within the Wine Country region have far exceeded wage gains and left housing unaffordable to the majority. Long distance work commutes are projected to be inevitable if current patterns persist. Until building workforce housing becomes a priority on a level with other public need priorities, the conditions creating jobs-housing imbalance and separation are projected to significantly worsen.

Workforce Housing Shift and Work Commute Impact: Several sub-areas of the Wine Country stand out in exhibiting jobs-housing imbalance and separation. The Santa Rosa Metro and Petaluma Metro sub-areas are projected to be the areas of employment concentration within the Wine Country area. The Calistoga and Saint Helena sub-areas are projected to also be subject to a workforce housing shift because of the relatively high level of unaffordablity associated with each sub-area. The sub-areas projected to provide locations for shifted housing supply are Cloverdale, Ukiah Valley, Middletown, Hopland, Lower Lake, and American Canyon.

Transportation Impacts: The most prevalent symptom of a jobs-housing imbalance is the impact on the roadway system connecting sub-areas of the high housing unaffordability with sub-areas where housing is significantly more affordable. The major issue reviewed was the long-distance commutes between home and places of employment. The four areas of study were:

- Lake County to Sonoma County,
- Ukiah Valley (Mendocino County) to Sonoma County,
- Ukiah Valley to Napa County, and
- Lake County to Ukiah Valley

Methodology

- Projections were developed from 30 years of wage and housing cost data collected by two data source firms used in the study. The GIS consultant created overlay maps of the Zip Code boundaries and Census Block Group boundaries so that a conversion table for census Track/Block Group to Zip Code boundaries could be developed. The housing cost and wage data by sub-area was compared to housing units and work commute trips. The amount of housing shortfall in the Santa Rosa and Petaluma sub-areas were assigned to sub-areas in Mendocino and Lake Counties based on the relative affordability of the housing and the travel impedance between sub-areas.
- Approximately 85 zip code geographic units were aggregated to 21 sub-areas which served as a basis for reporting existing conditions and developing future year projections. The primary reasons for using these geographic units were the availability of housing and wage data by zip code and the ability to convert census-based demographics to zip code boundaries.
- Wages were reported by Standard Industrial Classification (SIC) groups, and the housing data was by average housing cost for single-family dwelling units. Other measures are the number of families per dwelling unit and the number of substandard, deteriorated dwelling units remaining in the housing inventory. These became the indicators for jobs-housing balance evaluation.
- The impacts or symptoms of workforce jobs-housing imbalance is measured in the distance and time that separates job locations and affordable housing desired by workers. The impact of the added long distance commutes to the estimated 2020 projection horizon commutes was calculated for selected roadway segments at the county and region.

Constraints and Opportunities Affecting Jobs-Housing Balance (External Factors)

The assessment of the likelihood for success of mitigating the problem is directly linked to the opportunities and constraints that have existed in the environment fostering the jobs-housing imbalance and separation.

The constraints are many. Some of them are rooted in the location of natural resources like water and developable land, while others are politically created, such as zoning and regulations that determine land-use potential and others are policy based, such as open space preservation and maintaining a cultural character of an area. Finally, there are economic constraints associated with land-use considerations, as demonstrated by the grape growing and wine making priority of much of the Wine Country area.

The opportunities are also a part of the character of the area, the reliance on a respect for the physical beauty of the area, and a recognition that sustainable communities can only be established and maintained if there is access to physical, social and cultural resources for all of the people who choose to live in the area, both newcomers and long-time residents. As the awareness of the impact that unchecked market forces have on the quality and nature of Wine Country communities becomes a part of each stakeholders understanding, the opportunities for effective action are projected to grow.

Findings

Jobs-Housing Gaps: The Wine County IRP studied four variables: Dwelling Units, Employment (jobs), Wages (average) and Housing Cost (average). These variables represent the market forces that drive the jobs-housing imbalance phenomenon. What triggers these market forces is a very simple, yet overwhelmingly powerful desire of those individuals and families that act in this market place. The desire to own their home, to be in charge of their living environment at the most intimate level, to have complete authority over the physical building where they sleep, cook, bathe, and raise their children. Ignoring or discounting this desire has led to many poor planning and land-use decisions.

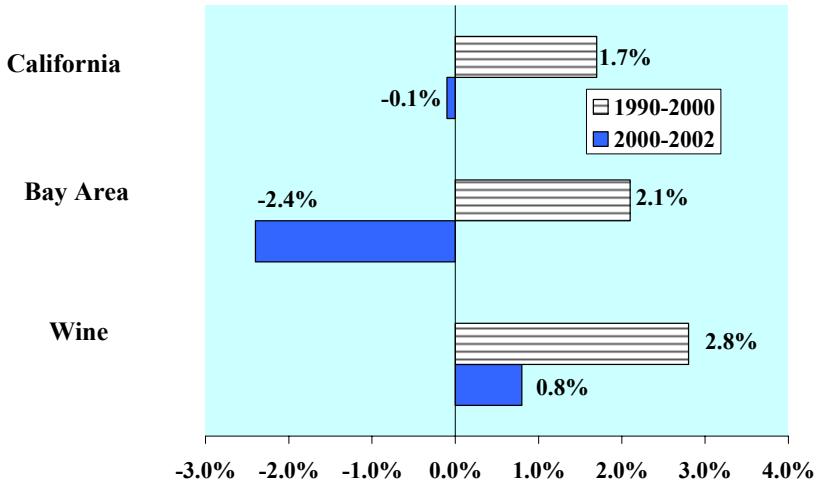
One of the traditional measures of jobs-housing balance has been to compare aggregate job growth and housing unit growth, and to calculate the ratio of jobs to housing. Although this measure was examined, this indicator was not found useful, as the data compilation discovered did not accurately reflect workforce housing needs. It compares total employment to total housing, assuming there is sufficient workforce housing in that total, which is not the case in the Wine Country. For example, while the jobs-housing ratio for the study area is projected to change from 1.71 as of 2002 to 1.14 by 2020, this comparison obscures the growing imbalance within the study area. When broken down into sub-areas however, the study projects a workforce housing shift and increased daily work trips that will stress the current roadway system. On State Route 29 alone, there is a projected 162 percent increase in traffic demand between Lake and Napa counties related to the greater affordability of housing in the Lake County area. These housing and traffic shifts in the study area more meaningfully indicate the jobs-housing imbalance facing the Wine Country over the next 20 years.

Employment: The comparative rate of growth in employment for the Wine Country has continued to be positive. The Wine Country changes in employment were predominantly in agriculture, manufacturing, retail and service, and construction. It should be noted that wine production is classified under manufacturing.

The chart presented in the figure on page 46, compares the growth rates for the past decade and the 2000-2002 periods. The Bay Area went from a gain of just under 200,000 jobs (+2.1 percent) for the ten-year period to a loss of 201,000 jobs (-2.4 percent) during the most recent three-year period. Even more remarkable is that from 2000-2002, the Wine Country area experienced a gain of over 6,000 jobs (+6.8 percent), even with the loss of approximately 7,000 high-tech jobs, from dot-com losses in Sonoma County alone. The vast majority of the jobs gained however, are low-wage jobs associated with agriculture, tourism, and the service sector.[59]

[59] Mendocino Council of Governments, *Wine County Inter-Regional Partnership Final Report*, June 30, 2004, Pg. 3.

Annual Rates of Employment Growth in Wine Country Counties, Seven-County Bay Area, and California 1990-2000/2000-2002[60]



Summary: Job Creation 2000-2003	
Wine Country	**6,250**
Bay Area	**-201,757**
California	**-31,885**

Wage Growth and Change

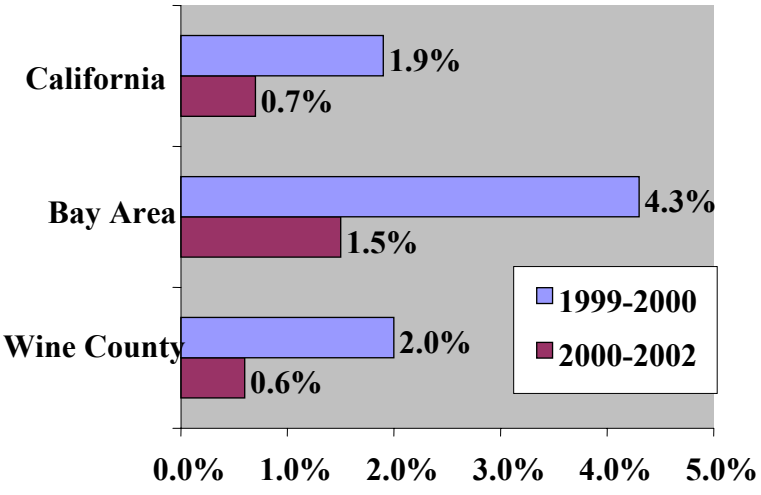
The changes in job numbers only tell part of the story. The job losses identified for 2000-2002 were predominantly higher wage jobs associated with dot-com businesses, data processing, computer assembly and manufacturing, and financial services. The jobs gained, as noted, were mostly lower-wage jobs that have relatively flat wage rate increases. The average wages for all jobs in the three comparison areas for the 2000 base year area are as follows:

- Four-county Wine Country Region $33,012
- Seven-county Bay Area $60, 612
- Sate of California $41,182

A comparison of the annual gains of real wages for the two time periods is shown in the figure on page 47, and again the Wine Country wage gains are significantly lower than either of the other two areas. The wage gains for the Wine Country were drastically reduced, while real wage gains in the Bay Area remained robust, even in the face of the job losses. The job losses are concentrated in specific SIC clusters; wage gains in unaffected sectors continue at a robust pace for the Bay Area.

[60] Mendocino Council of Governments, *Wine County Inter-Regional Partnership Final Report*, June 30, 2004, Pg. 3.

Annual Gains of Real Wages in Wine Country, Bay Area, and California 1999-2000/2000-2002[61]



Actual Wage Gains 2000 – 2002

Wine Country	**$600**
Bay Area	**$2,800**
California	**$800**

In the Wine Country area, the impact of the job losses during 2000-2002 was very different. The wage gains of 1990-2000 will not be continued into the next decade without a significant change in economic base diversification and major realignment of resources to support such employment activities.

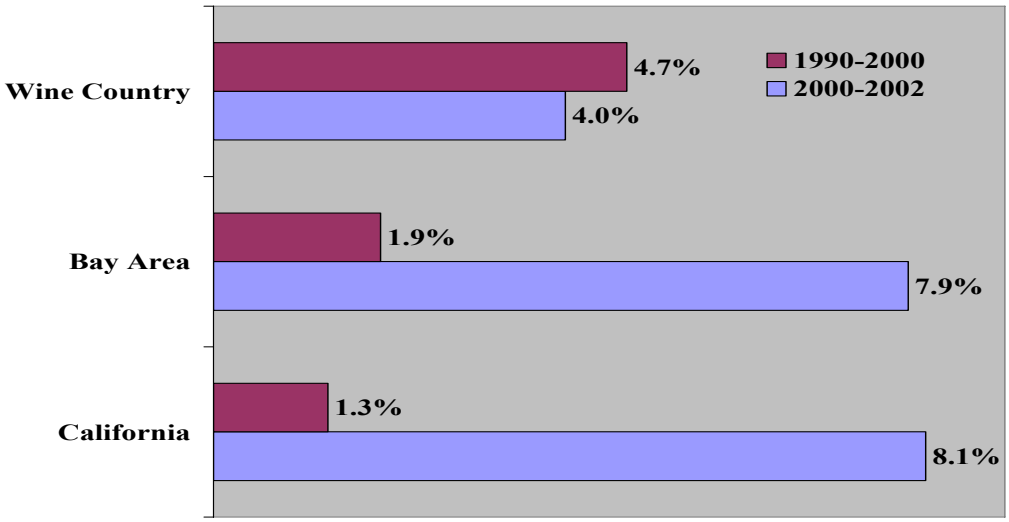
Housing Affordability Indicators

In looking at the 2002 values, a counter-intuitive phenomenon is apparent. In the face of massive job losses in the Bay Area, the housing costs continued to increase at an accelerated rate. The increases in housing costs for the Wine Country were minimal for the same time period. Although the basic pattern of housing cost increases showed housing cost increases in the Wine Country at a growth rate above both the Bay Area and the State the starting point for the Wine Country housing costs were lower than either the Bay Area or the State. At the time of this report, the housing costs in the Wine Country area are still slightly lower than in the Bay Area.

[61]Mendocino Council of Governments, *Wine County Inter-Regional Partnership Final Report*, June 30, 2004, P. 5.

This condition really becomes apparent in the below figure, which compares the housing cost changes for the two time periods. The increase in housing costs during 2000-2002 was almost two-and-a half times higher for the Bay Area than for the Wine Country area. Of even more concern is that the rate of acceleration in costs for the two-year period 2000-2002 is significantly greater for the Bay Area and statewide than for the Wine Country area.

Annual Housing Price Gains
In Wine Country, Bay Area, and California
1990-2000/2000-2002[62]



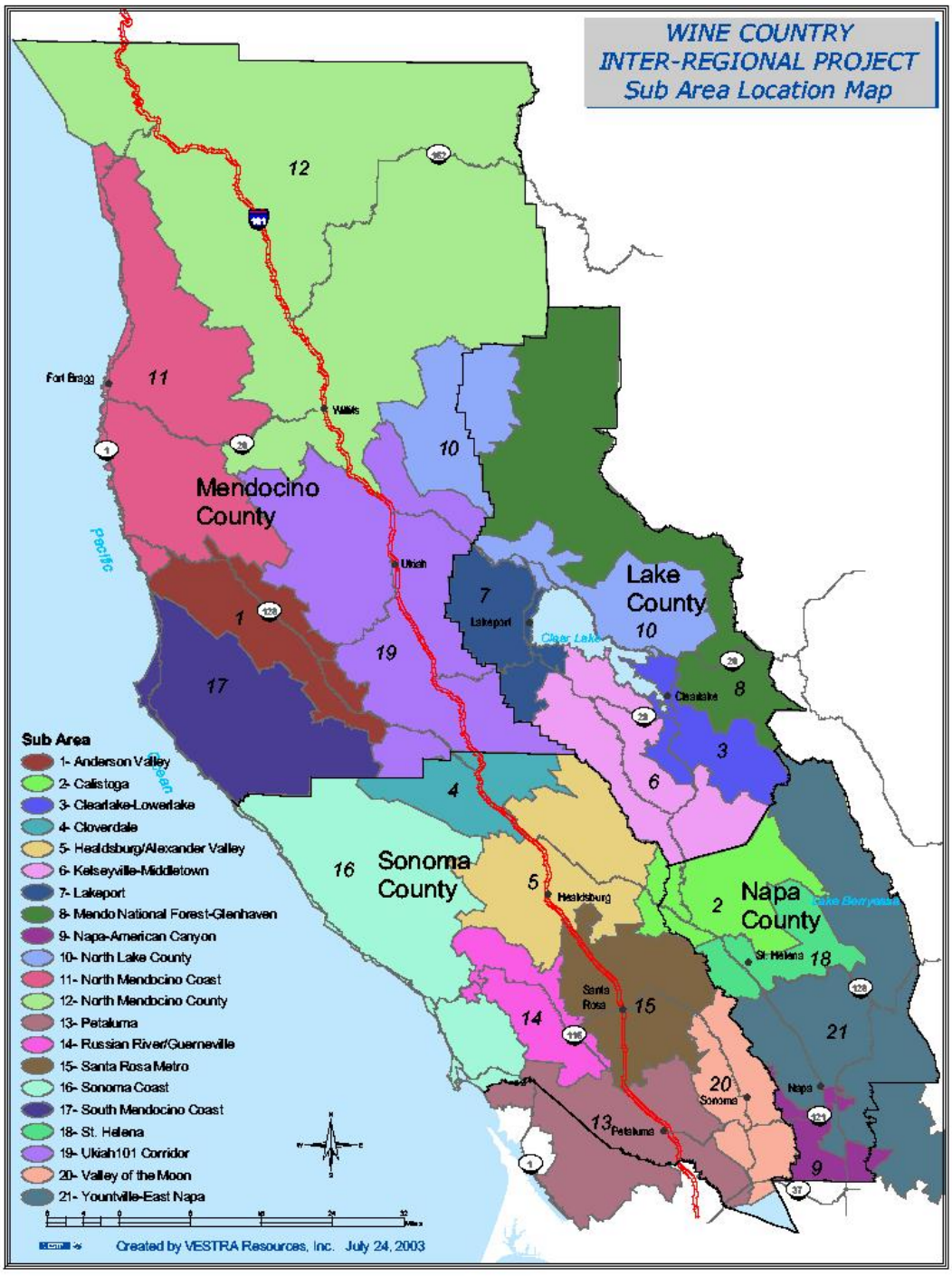
Summary: Housing Price Gains 2000 – 2003	
Wine Country	**$37,500**
Bay Area	**$90,700**
California	**$66,700**

Trends by County in Wine Country IRP: Existing conditions were examined for each of the four counties comprising the Wine Country area. The sub-areas that make up each county were also evaluated in tracking the trends implicit in the housing affordability indicator values. While these trends should be treated with caution, when viewed against the background of the past decade, they can definitely point to the potential for cross-regional impacts of jobs-housing imbalance.

[62] Mendocino Council of Governments, *Wine County Inter-Regional Partnership Final Report*, June 30, 2004, Pg. 6.

The geographic boundaries of the sub-areas which comprise the four counties are presented in the figure on page 50, along with the basic roadway system. The housing affordability area indicators for 2000 to 2002 within each of the four counties are presented in the table on page 51, showing the changes in affordability for each county. Again, the index is the number of wage earners, at the average wage for the county, with capacity to purchase the average priced single-family house in each respective county.

Wine County Inter-Regional Project[63]



[63] Mendocino Council of Governments, *Wine County Inter-Regional Partnership Final Report*, June 30, 2004, Pg. 9.

In looking at the changes in affordability indicators in the 21 sub-areas that comprise the four county Wine Country area, some specific islands of affordability can be identified. The below table shows the sub-areas that are affordable under the definition for wages to housing cost qualifications. Basically, all of Sonoma County is unaffordable in terms of workforce housing, and all of Lake County remains affordable for workforce populations in the four-county region. Mendocino County has two sub-areas that are affordable, along the US-101 Corridor, and Napa County has one sub-area, composed of south Napa and American Canyon.

Small Islands of Affordability In Wine Country Region, 2002[64]

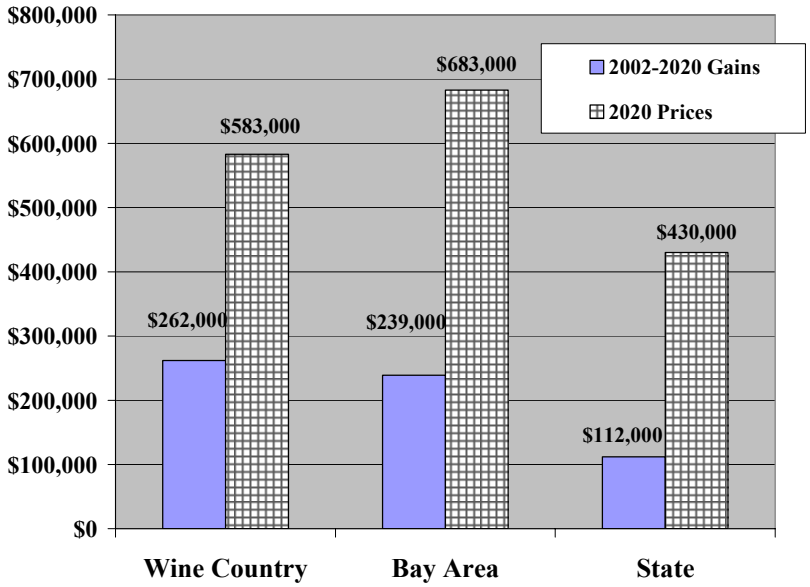
	Number Wage Earners Required to Purchase Home
Sonoma County	**Unaffordable in terms of workforce housing**
Mendocino County Ukiah 101 Corridor	**2.07**
North Mendocino County	**1.13**
Napa County -South Napa-American Canyon	**2.09**
Lake County	**1.53**

Jobs to Housing: The projected changes in numbers of jobs greater than housing units produced during each time period; and the resultant jobs-to-housing unit ratio. The period of 1990-2002 experienced significantly greater growth in jobs than housing with resultant imbalances in the jobs-to-housing ratios for both the Bay Area and the Wine Country. The projections for 2002-2020 indicate a slowing in job growth and a fairly flat increase in housing, but sufficient to bring the jobs-to-housing ratio closer to 1.00. The State is projected to maintain a comfortable balance between jobs and housing *at the aggregate level.* However, regions of the State vary significantly in the mix and availability of housing.

Wages and Housing Costs: In reviewing the projections to this point, a significant portion of the market force variables has not been addressed: wages and housing costs. The following graphics point out the large discrepancy between average wages and housing costs projected for the future. As mentioned before, the past several years have seen phenomenal increases in Wine Country housing prices, moving from approximately 80 percent of Bay Area housing prices to almost equivalent housing prices. The figure, on page 53, shows the comparative housing cost increases and projected 2020 housing prices for the Wine Country, Bay Area, and statewide. The costs of housing in the Wine Country are projected to be among the highest in the State. The impact of this portion is dramatically demonstrated in the figure on page 52, which compares projected increases in wages and housing costs for 2002-2020.

[64] Mendocino Council of Governments, *Wine County Inter-Regional Partnership Final Report*, June 30, 2004, Pg. 11.

Projected Housing Price Gains
Wine Country Counties, Seven-County Bay Area, and California, 2002 – 2020
(Projected Prices 2020)[65]

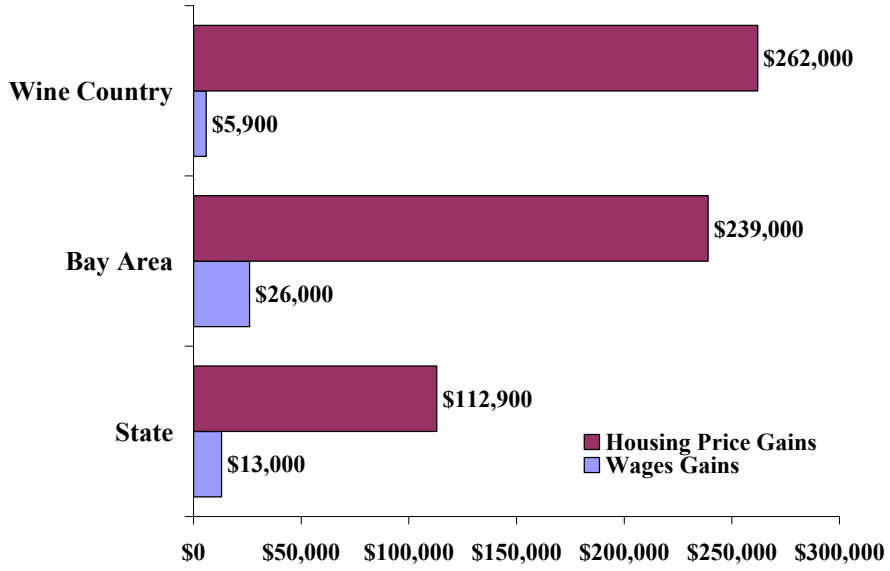


Source: Applied Development Economics

The wage gains projected for the Bay Area are significantly higher than the projections for either the State or the Wine Country. However, the projected rise in housing costs when compared to the minimum increase in wages illustrates the potential for workforce housing shifts and crippling jobs-housing imbalances for the Wine Country. The purpose of projecting these variables into the future is to capture the impact of the market forces that these variables represent on creating the long-distance work commutes between sub-areas of the Wine Country area.

[65] Mendocino Council of Governments, *Wine County Inter-Regional Partnership Final Report,* June 30, 2004, Pg. 19.

Projected Housing Price Gains Compared to Wage Gains
Wine Country Counties, Seven-County Bay Area, and California 2002-2020[66]



The evaluation of housing affordability is based on the estimated number of wage earners, at the average wage for an area that it would take to qualify for purchase of the average priced dwelling unit in a given area. The index number created can be treated as either an unaffordability index or a measure of affordability. The index change for each county is shown in the below table. The change in affordability is the greatest in Napa County and smallest in Lake County. Indeed, Lake County is the only county to remain affordable based on a threshold of two wage earners to qualify for an average home. In comparing the 2002 base year to the 2020 forecast year, the continued lack of workforce housing, is projected to significantly impact the quality of life in the Wine Country area.

Indicators of Housing Unaffordability, Wine Country Region, 2002-2020[67]

Location	Number Wage Earners Required to Purchase Home		Affordability Decline
	2002	2020	
Sonoma County	2.81	4.48	-59%
Mendocino County	2.47	3.93	-59%
Napa County	2.74	4.55	-66%
Lake County	1.50	1.89	-26%
Wine County Regional Total	2.72	4.14	-52%

[66] Mendocino Council of Governments, *Wine County Inter-Regional Partnership Final Report*, June 30, 2004, Pg. 20.
[67] Ibid, Pg. 23.

The shortage of workforce housing, defined as housing that is affordable on at least two average worker wages, is at the heart of the imbalance impacts. This leads to explanation of the phrase "separation of jobs and housing," which has been included in the discussion of the jobs-housing imbalance phenomenon. The impacts or symptoms of workforce jobs-housing imbalance is measured in the distance and time that separates job locations and affordable worker housing desired by workers.

Other measures are the number of families per dwelling unit and substandard, deteriorated dwelling units remaining in the housing inventory. As workers chase the housing type and quality that is desired at prices that they can afford, the distances that the work trips will require become longer and the impacts on inter-regional access links become greater.

The production of moderately priced workforce housing by private sector "market-priced" home builders has become virtually nonexistent. Contributing factors are many and embedded in the accumulation of public and private sector policy decisions. This results in a gap in the supply of moderately priced "starter" or workforce housing for both the Bay Area and the Wine Country. The crucial issue will be the employment mix and occupations associated with the growth. Until building workforce housing becomes a priority on a level with other public need priorities, the conditions creating jobs-housing imbalance and separation are projected to significantly worsen.

Jobs-Housing Imbalance Impacts: Long-Distance Work - Trip Commuting

The transportation system that serves the four-county Wine Country area is predominantly a roadway access system. The passenger modes include the private automobile, busses (private and public) and taxi cabs. Freight is carried by trucks of all sizes and specialization. Railroad tracks are available through Mendocino, Sonoma and Napa counties; however, no rail service is available. Planning efforts are ongoing in each of these counties for some type of rail service.

The roadway connecting the four counties is relatively sparse with few alternative routes available. Route US-101 serves as the primary north-south access route to areas outside the Wine Country area. The status of existing and future traffic demand is shown in the table on page 55, with key roadway segments highlighted for ease of review. The change projected between 2000 and 2020 is highlighted in the last column and indicates the traffic increases without taking into consideration the jobs-housing imbalance impacts across county lines.

The information in the table should be reviewed in light of the background data contained both in the Projections Chapter and in the transportation data from the Existing Conditions Report.

Existing Traffic Demand on Roadway System[68]

Hwy	County	Description	Daily Traffic Volumes				
			1990	2000	1990 2000 % Change	2020	2000-2020 % Change
1	Mendocino	J ct. Rte. 128 East	3,300	4,500	27%	6,840	52%
1	Mendocino	Point Arena, Lake Street	4,300	4,400	2%	7,080	61%
1	Sonoma	J ct. Rte. 116 East	5,500	5,300	-4%	6,360	20%
128	Mendocino	West Limits Philo	7,550	7,500	-1%	8,775	17%
128	Mendocino	Mendocino-Sonoma Co.Line	4,650	4,300	-8%	4,620	7%
128	Sonoma	South J ct. Rte. 101, Canyon Rd Interchange	5,200	4,750	-9%	7,410	56%
128	Sonoma	Kellogg, Franz Valley Road	3,350	4,500	26%	9,270	106%
128	Napa	Tubbs Lane	11,800	10,950	-8%	N/A	N/A
128	Napa	Lower Chiles Valley Road	1,700	2,420	30%	3,395	61%
101	Mendocino	Moore Avenue Exchange	38,400	49,600	23%	62,100	25%
101	Mendocino	Mendocino Sonoma Co. Line	20,800	25,200	17%	35,280	40%
101	Sonoma	Lytton Springs Rd Interchng	40,800	48,300	16%	75,500	56%
101	Sonoma	Shiloh Road Interchange	84,000	118,000	29%	136,700	16%
20	Mendocino	Redwood Valley Rd Exchange	16,600	20,400	19%	43,200	112%
20	Lake	Scott Valley Road	11,400	14,400	21%	32,400	125%
175	Mendocino	East Side Road	5,000	5,300	6%	12,160	129%
175	Lake	J ct. Rte. 29 South, Kelseyville	2,840	2,470	-15%	6,500	163%
29	Lake	J ct. Rte. 53 No., Lower Lake	11,700	19,100	39%	27,580	44%
29	Lake	Napa Lake County Line	8,000	14,200	44%	21,300	50%
29	Napa	J ct. Rte. 128 East, Rutherford	32,500	42,200	23%	50,640	20%
29	Napa	Trancas-Redwood Road	51,600	80,000	36%	170,400	113%
12	Napa	J ct. Rte. 29 South, Napa	31,000	53,000	42%	82,000	55%
12	Sonoma	Napa-Sonoma County Line	N/A	28,000	N/A	57,100	104%
Calistoga Rd.	Sonoma	Santa Rosa City Limit	N/A	14,785	N/A	22,030	49%
Petrified Forest Rd.	Sonoma	Sonoma –Napa Co Line	NA	10,890	NA	13,395	23%

[68] Mendocino Council of Governments, *Inter-Regional Partnership Final Report*, June 30, 2004, Pg. 34.

Before evaluation of the 2020 projections, the highlights from the 1990 to 2000 time period for traffic demand increases on the circulation system serving the Wine Country area were reviewed. These Annual Daily Traffic increases are highlights from 1990-2000:

- 44 percent increase on Highway 29 in Napa County at the Napa-Lake County line;
- 42 percent increase on Highway 12 in Napa County at Jct. Rte 29 South;
- 39 percent increase on Highway 29 in Lake County at Jct. Rte 53 North; and
- 36 percent increase on Highway 29 in Napa County at Trancas-Redwood Rd.

The traffic flow numbers reflect the tremendous growth in both employment and population during the decade from 1990 to 2000, particularly in the latter half of the ten-year period. Again, what is phenomenal in the changes from 2000 to 2002 is that in the face of very large losses of manufacturing, dot-com/Internet and computer programming jobs in the Bay Area, including Sonoma County, the housing prices and job growth continued to increase in the Wine Country. The below table presents the heaviest commute patterns between the four counties.

Heaviest Commute Patterns – 2000[69]

From	To	One Way Daily
Sonoma County	101 South	32,000
Napa County	Solano County	9,177
Sonoma County	Napa County	3,030
Napa County	Sonoma County	2,146
Lake County	Sonoma County	1,415
Lake County	Mendocino County	1,103
Mendocino County	Sonoma County	1,023

The workforce housing shift created by the deficit of housing in employment-rich sub-areas was estimated by weighing the relative attraction of sub-areas deemed able to supply housing against impedance in the access to the sub-areas where jobs are concentrated. Therefore, while the Kelseyville-Middletown sub-area, has by far the most affordable indicator for housing, the access route via SR-29 is so difficult and potentially hazardous, that the Hopland sub-area with its superior access via US-101, (recently up-graded to a four-lane expressway between the Mendocino-Sonoma County line and the Hopland southern edge), experienced a greater amount of the shifted housing demand.

The last step in estimating the number of dwelling units that will be shifted involved converting the trips associated with the workforce housing shift to inter-county work-trip commute numbers that can be added to the existing 2020 projected work-trip commute interchanges.

[69] Mendocino Council of Governments, *Wine County Inter-Regional Partnership Final Report*, June 30, 2004, Pg. 42.

The findings projected for jobs-housing imbalance impacts on the connecting roadway system are summarized below.

Findings: Adjusted Work Trip Commute

Projected 2000 – 2020 Work Trip (daily one way) Commute Changes:
- Increase of 68 percent (+ 945 trips) Lake County to Sonoma County.
- Increase of 162 percent (+1,328 trips) Lake County to Napa County.
- Increase of 108 percent (+ 2,237 trips) Lake County to Mendocino County.
- Increase of 47 percent (+ 477 trips) Mendocino County to Sonoma County.

Imbalance Impact, adjusted 2000–2020 Work Trip Commute Changes:
- Lake to Sonoma increase of 215 percent (+ 3,045 trips).
- Lake to Napa County increase of 318 percent (+ 2,423 trips).
- Mendocino to Sonoma County increases by 604 percent (+ 6,177 trips).
- The increase will be in work trips which primarily occur over the peak hour periods of the daily traffic demand.
- With the exception of US-101 Highway these trips will have to be accommodated on rural two-lane roadways.
- Work trip travel times will increase, in some cases significantly.

The following figure on page 58, depicts the projected increased traffic demand in the Napa County sub-area. In particular it and illustrates the projected increase between Lake and Napa counties, due to a shift in increased housing demand to the more affordable Lake County sub-area.

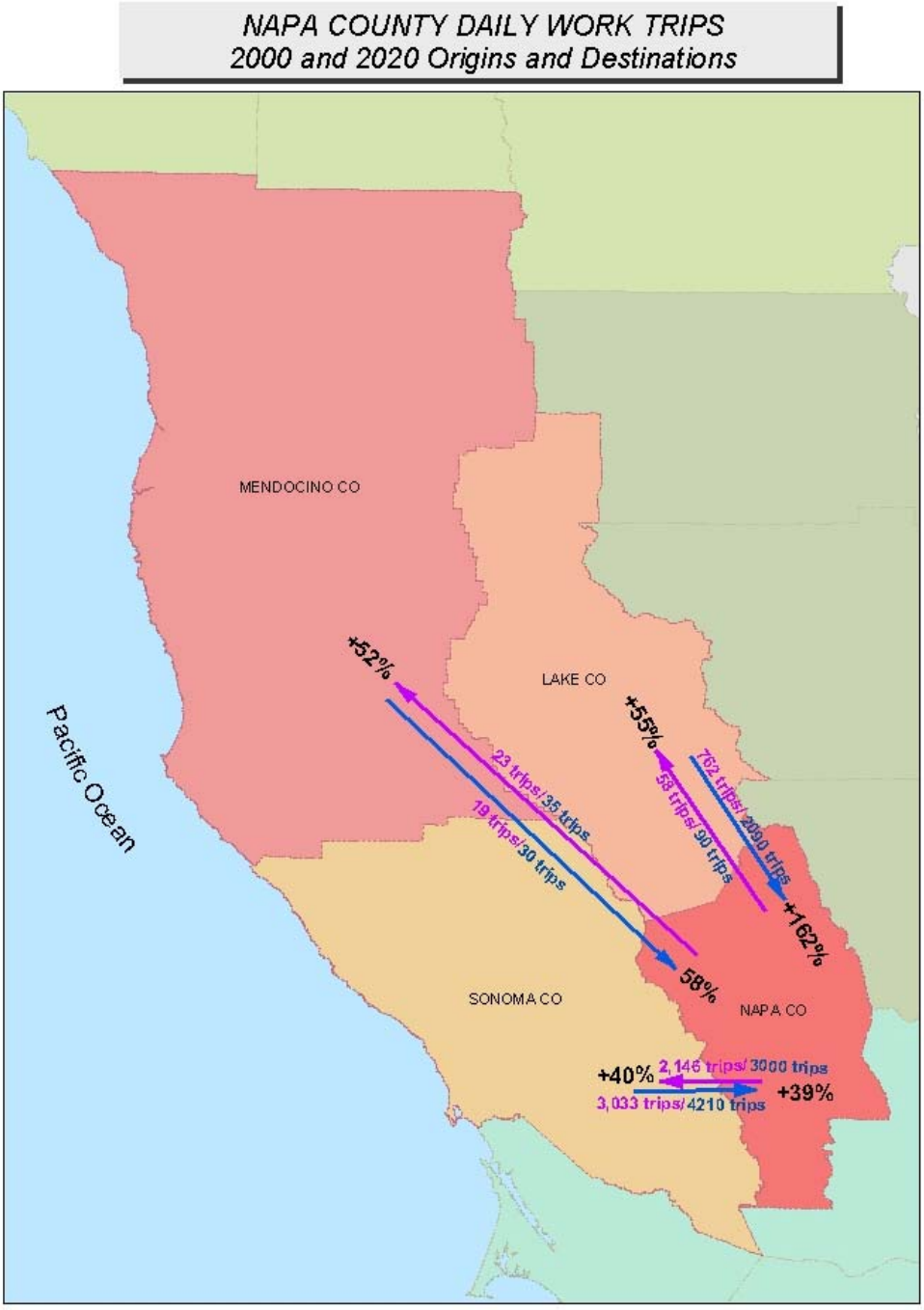
In summary, the access system connecting the Wine Country area presents two major issues:

- An increase in work-trip commuting between Wine Country counties, driven by existing workforce housing shortages.
- Based on housing affordability and workforce employment distribution, Lake and south Mendocino counties will see increased housing demand from outside their boundaries.

In addition to the housing and economic development issues and problems identified in the proceeding chapters, the following access problems will have to be addressed:

- The majority of connecting roadways are two-lane, rural, substandard road ways.
- There is no interregional transit service available.
- Key roadway segments connecting Lake, Napa, Sonoma, and Mendocino counties run through rugged, mountainous terrain with limited sight distance and passing lanes.
- Usable capacity on these roadways is limited. It will not take much of an increase in commute traffic to create safety and access problems.
- At present there are no viable alternatives to the roadway system.

Napa County Daily Work Trips[70]



[70] Mendocino Council of Governments, *Wine County Inter-Regional Partnership Final Report,* June 30, 2004, Pg. 45.

Projected Effects of Population, Housing, and Job Growth

When the data collected is considered in context, what should appear is a picture of where the market forces (described by the projected variables) are projected to impact jobs-housing imbalance symptoms.

The most prevalent symptom is the impact on the roadway system connecting sub-areas of high housing unaffordability with sub-areas where housing is significantly more affordable. This situation is projected to create a crisis in the Wine Country. It simply has not yet reached crisis proportions, but the issue should be addressed before crisis management is necessary.

The key element findings of the IRP project are:

- In the decade of 1990 to 2000, the four-county Wine Country area led both the Bay Area and California in the rate of job growth and population growth.
- The wage level for the average worker in the Wine Country is substantially below those of the Bay Area and California, both in the real value of wages and in the rate of growth in wages.
- Housing costs in the Wine Country has risen at a faster rate of increase than in the Bay Area and statewide, so much so that by 2004 the average home price in the Wine Country is within a few thousand dollars of Bay Area home prices.
- The roadway system connecting the four-county Wine Country is composed of two lane rural highways and county roads. The only expressway-level facility is US-101 linking Mendocino and Sonoma counties. These roadways are not designed for work trip commute traffic.
- The 2020 horizon year projections identify a significant gap between workers' wages and the average home price for all of the Wine Country area except Lake County. The ability of the average worker to qualify for purchase of the average home has deteriorated to the point that 4.1 wage earners are required to purchase a home in Sonoma County, with similar values for Napa and Mendocino counties.
- A shift of workforce housing demand is projected within the region for the 2020 horizon year based on the projected housing, employment, population and wage data. In this projection, the housing units shifted were converted to commute trips between sub-areas across regional and county boundaries.
- The roadway segments that connect the sub-areas and counties within the Wine Country area are projected to experience severe congestion and safety problems as result of the work-trip commute increases.

The preliminary conclusions from the above evaluation can be stated as follows:

- Areas of the Wine Country region which were housing rich in 1990 are projected to remain housing rich in 2020.
- There will be an enormous shortage of workforce housing.

Role of Public, of Participating Jurisdictions, of Local Resources

The IRP conducted a thorough process of identifying, contacting, and interviewing potential stakeholders and formed a Leadership Team of public and private sector representatives to look at the issues and recommend actions. A target mail list was compiled and a conference invitation was issued to over 800 people and organizations. The role of the Leadership Team was to serve as a sounding board for the Wine Country IRP and consultant team; and provide direction and guidance on stakeholder involvement issues.

The Leadership Team in 2003-2004 also provided valuable feedback on understanding of the technical studies and relevance to the concerns of stakeholders. A March 25, 2004 General Assembly meeting ("Bridging the Gap Jobs-Housing Conference"), focused on results of the 2020 projections for jobs and housing, economic development models, examples of various housing projects, impacts on the circulation system connecting the four Wine Country counties, and interactive discussion time to gain feedback from stakeholders.

IRP Implementation Strategies

This IRP identified five key short-range strategies to address their jobs-housing strategies. Additionally, the Wine County IRP also identified stakeholders to champion the project. These strategies recommended are:

1. **Coordinate the Workforce Investment Boards** in each of the four counties to address permit streamlining for workforce housing, encouraging job and occupational skill training programs that focus on higher wage jobs, and to review the Wine Country IRP MOU for sources of regional agency support.

2. **Coordinate workforce housing development activities** of affordable housing advocacy groups including Rural Communities Housing Development Corporations, Community Development Commissions, Affordable Housing Task Forces, Affordable Housing Coalitions, and Affordable Housing Trusts to bring about greater awareness of workforce housing needs for sustainable communities. One of the specific actions of this group would be the creation of an affordable housing trust fund in each of the four counties.

3. **Develop a coordinated strategy for promotion of tourism** within the four-county Wine Country area. Specific actions may include:

    - Integrate lists of hotels and motels including seasonal and off-season rates.
    - Coordinate calendars of events including dates, times and nature of event.
    - Develop connections between annual events and local arts and entertainment.

4. **Develop an on-going transportation planning and programming coordination group** from the existing regional transportation organizations in the four-county area. Potential members of this group include:

    - RTP Agencies
    - County Transportation Departments
    - County and City Transit Operators
    - Rail Programming and Planning Authorities

5. **Maintain a website for communication and coordination activities** between stakeholders and implementation action groups. The website, along with email, is projected enable the Leadership Team to communicate with one another and to access information regarding the ongoing activities of the implementation groups.

Final Internal Assessment of Outcomes – Conclusions

The overriding dynamic that will determine the necessary changes in resource allocation and policy determination is the willingness to examine and change priorities by all of the players who influence the jobs-housing imbalance phenomenon. Many of the special interest groups and policy makers who directly affect the creation of workforce housing and higher wage jobs are acting on priorities set in motion 20 and 30 years ago. To engage in a no holds barred, open discussion of the priorities and belief systems that led to the creation of many of the current policies and single-purpose organizations may be too threatening for many. In the short term it would be helpful for RTP organizations to engage in environmental review of transportation impacts associated with land use decisions. Long term issues that need further study, which could stimulate stakeholders to action include the extent that lack of workforce housing might affect diversification of the economic base; and second, the social and fiscal costs to communities when significant portions of the workforce commute out of the area. Continued funding of this effort is essential to the long-range welfare of the State. Cal-Trans is assisting in funding the second phase of the Wine Country IRP due to specific interrelated issues in the first phase in relation to the Department's ongoing efforts in interregional transportation studies. The studies are complementary to the goals and policies of the Department's Interregional Transportation Strategic Plan and related interregional studies priorities.

Final Note

Since the drafting of this report the voters of County of Napa, one of the areas study in this emerging IRP, voted in the November 2004 elections on a transportation initiative. The vote was asking voters if Highway 12/Jamieson Canyon should be widened. Although no funding was enacted, 78 percent of the voters endorsed the idea of widening the highway.

SANTA BARBARA COUNTY ASSOCIATION OF GOVERNMENTS (SBCAG) IRP[71]

Project Description

Stakeholders from Santa Barbara and Western Ventura counties, under the administration of SBCAG addressed the following issues:

- South Santa Barbara job creation exceeding housing production;
- Long distance commutes for east Ventura County workers; and
- Increased commuting from north Santa Barbara County to south Santa Barbara County.

The purpose of the IRP project was to:

- Address issues relating to the balance of jobs, housing, and mobility in Santa Barbara County and Western Ventura County west of the Conejo Grade, (Hwy 101) in a collaborative framework;
- Develop new tools to analyze the problem, and
- Develop strategies for promoting an appropriate balance in the future.[72]

The effort resulted in suggested ways to collaborate at local, regional and State levels to encourage more housing choices in areas rich in jobs and in job creation, and ways to take better advantage of local skills and human resources in areas rich in housing. Development that features a variety of housing opportunities closer to job centers and transportation infrastructure and job growth, and business relocation/expansion closer to housing opportunities, are projected to yield shorter commutes and a higher quality of life for our residents and workforce. To accomplish this goal, policies and strategies must address the complex dynamics of the three sub-areas, northern Santa Barbara County, the Santa Barbara South Coast and Western Ventura; and leveraging the community values and strengths that are already present in these communities.

Noticeable and positive changes at the local level will require political influence at the state level that can only be accomplished through strategic cooperation at the regional level.

[71] *http://www.abag.ca.gov/planning/interregional/stateirp/santa_barbara-ventura.htm*
[72] Santa Barbara County Association of Governments, *Taking Action Regionally – IRP Final Report*, July 2004.

Study Area Counties: Santa Barbara, Ventura, including 18 cities

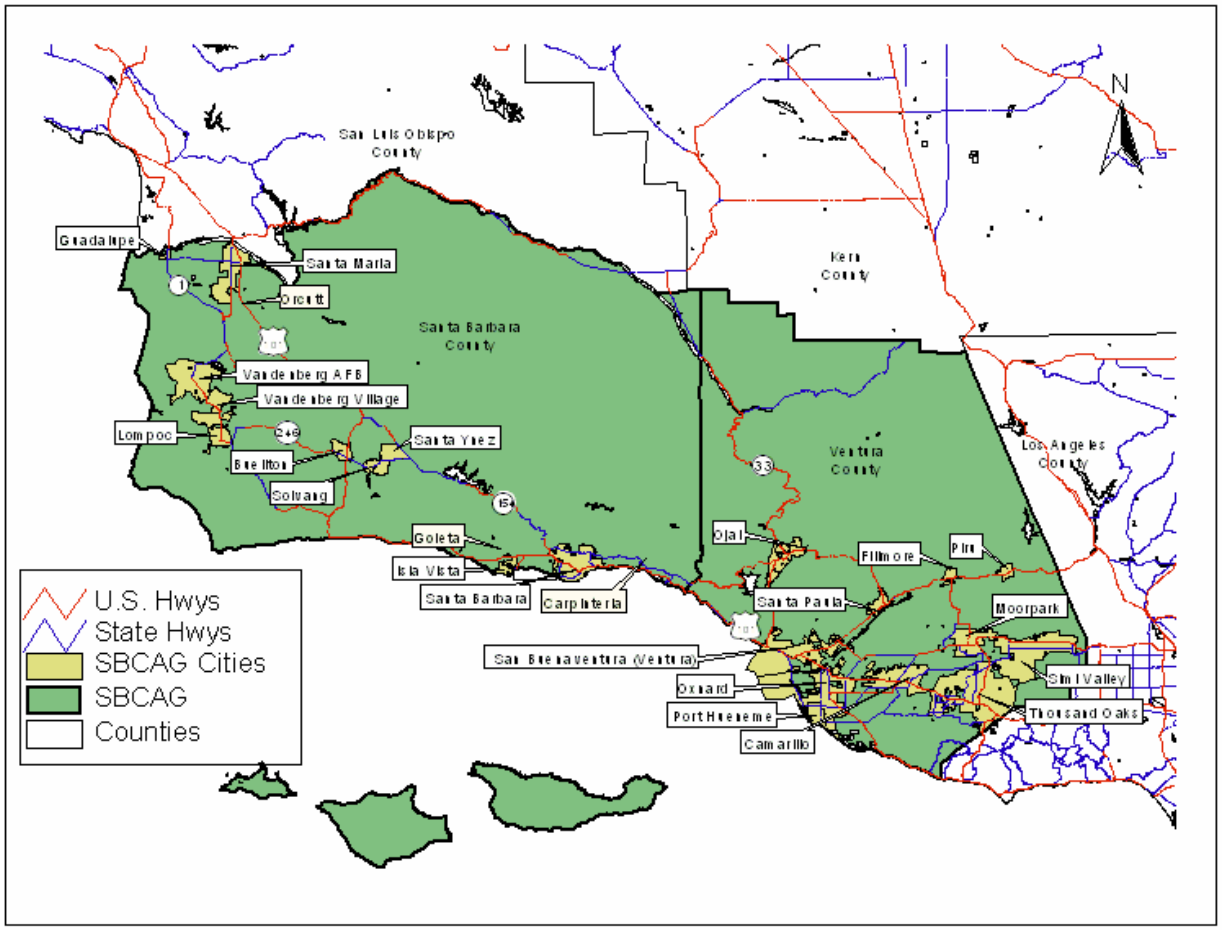
Total Population 2004: 1,217,232

Total Households 2004: 397,134

Square Miles: 4,582

Major Highways: US Hwy 101, Hwy 33

SBCAG IRP Study Area



Existing Conditions

Week to week and month to month, residents of northern Santa Barbara County, the Santa Barbara South Coast and Western Ventura County are confronted with more time-consuming commutes, as well as higher costs of home ownership and rental housing. The result is a shrinking middle class. Major employers close their doors and move away; service workers are forced to find housing in distant towns; people who can't afford to commute double up in a shrinking supply of homes, cottages and apartments. Health and safety organizations are increasingly challenged to hire and keep qualified personnel, jeopardizing health care services at the most basic level. Quality-of-life indicators, such as ease of mobility and a decent, affordable place to call home are slipping away as the mismatch between jobs and housing becomes more and more pronounced. [73]

Santa Barbara County has 110 miles of coastline and is bordered inland by San Luis Obispo (SLO) to the north, Kern counties to the east, and Ventura County to the south. The County occupies approximately 2,774 square miles. The County had a total population of 410,300 in 2003. There are numerous planning-related issues now facing the County, including: the cost of housing, the lack of affordable housing, the jobs-housing imbalance, limited transportation corridor capacity, limited public sector financial resources, and development pressures. Growth is channeled into urban areas through the goals and policies of the land-use element of the Santa Barbara County Comprehensive Plan.[74]

The jobs-housing balances, as reported for year 2000 by SBCAG *Santa Barbara Regional Growth Forecast: 2000-2030*, March 21, 2002, for the four major areas of the County were as follows:

Santa Barbara County Population, Jobs, Housing Units, and Jobs-Housing Ratios[75]

Sub-Region	Population	Jobs	Housing Units	J/H Ratio
South Coast[18]	201,000	108,207	73,281	1.48
Santa Ynez	21,800	8,528	8,259	1.03
Lompoc	58,300	20,157	18,809	1.07
Santa Maria	116,800	41,508	35,317	1.18
County-wide Totals	397,900	178,400	135,666	1.31

[73] Santa Barbara County Association of Governments, *Taking Action Regionally – IRP Final Report*, July 2004.
[74] The Santa Barbara/Ventura Inter-Regional Partnership for Jobs/Housing Balance, Appendix B Report on Existing Condition, Pg. B-3.
[75] Ibid, Pg. B-4.

Santa Barbara County currently hosts 179,756 jobs and has 142,901 housing units, for a 1.26 jobs-housing unit ratio county wide. Within the County, the ratio varies from a high of 2.30 jobs per housing unit in Goleta, to a low of 0.39 jobs per unit in the unincorporated Santa Maria area.[76] Ventura County is bordered inland by Santa Barbara and Kern counties to the north and west and Los Angeles County to the north and east. The County occupies approximately 885 square miles and is less than one-third the size of Santa Barbara County. Ventura County had a total population of 798,000 in 2003, almost double the population of Santa Barbara County.

Approximately 90 percent of the County's population lives in its ten incorporated cities: Ojai, Ventura, Oxnard, Port Hueneme, Camarillo, Santa Paula, Fillmore, Thousand Oaks, Simi Valley, and Moorpark. The remaining 10 percent (80,000) of the County's population lives in the unincorporated County. The County's unincorporated communities include: El Rio, La Conchita/Sea Cliff, Foster Park/Casitas Springs/Oak View, Saticoy, Somis, Piru, and Bardsdale.

Ventura County's urban footprint (either already urbanized or approved for urban conversion) consists of approximately 105,000 acres or 19 percent of the total land and is almost five-times the relative size of the Santa Barbara urban footprint. Only 95,000 acres, or 17 percent of the total, is undeveloped and unconstrained by these other factors.

Ventura County considers the equilibrium range for its jobs-housing ratio to be 1.10 to 1.34 full-time equivalent jobs per dwelling unit. An area within the County having a ratio of less than 1.10: 1 is considered to be "jobs-poor." An area with a ratio of more than 1.34: 1 is considered to be "jobs-rich."

The current jobs-housing balances for the four major areas of the County, as calculated from data from *Ventura County General Plan, June 19, 2001* are as follows:

Ventura County Population, Jobs, Housing Units, and Jobs-Housing Ratios [77]

Sub-Region	Population	Jobs	Housing Units	J/H Ratio
Ventura, Oxnard, Camarillo, Pt. Hueneme	362,586	166,334	121,054	1.37
Santa Paula, Fillmore, Ojai	67,558	17,483	22,423	0.78
Thousand Oaks	124,640	71,255	45,476	1.57
Simi Valley / Moorpark	144,675	41,800	47,735	0.88
Sub-region Totals	699,453	296,872	236,688	1.25

[76] Inter-Regional Partnership or Jobs, Housing and Mobility, Background, Recommendations and Actions Steps, July 2004, Pg. 8.
[77] The Santa Barbara/Ventura Inter-Regional Partnership for Jobs/Housing Balance, Appendix B Report on Existing Condition, Pg. B-5.

As shown on the table on page 65, two of Ventura County's four sub-regions are considered to be jobs-rich and two are considered to be jobs-poor. Ventura County west of the Conejo Grade hosts about 197,000 jobs and has approximately 129,000 housing units, for a 1.53 jobs-housing ratio. Within West County, the ratio varies from a high of 2.09 in Port Hueneme to a low of 0.82 in Santa Paula. By 2020, Santa Barbara County and Western Ventura counties population is projected to increase by 208,000; employers are projected to create 105,000 new jobs, and builders are projected to construct 61,000 housing units. This is an addition of only one unit for every 3.4 people overall (compared to one unit for every 3.3 people overall currently). A deficit in needed housing stock to accommodate the projected population growth would necessitate increasing the average number of persons per housing unit, therefore creating an overcrowding situation. The South Coast of Santa Barbara County is projected to add one-third of the new jobs in the region, but only one-tenth of the new housing units.

The notion of balancing jobs and housing goes well beyond trying to attain numerical equality. Ideally, the jobs available in a community need to match the labor force skills, and housing should be available at prices, sizes, and locations for workers who wish to live in the area. Hence, there is a "qualitative" as well as "quantitative" component to achieving jobs-housing balance."

Methodology

The application of a GIS was used to organize, define, analyze, and display the various dimensions and impacts of the jobs-housing imbalance. The study scope included the development of a comprehensive GIS system to display land-use, housing, employment, and transportation data for the entire study area that includes all of Santa Barbara and Ventura counties west of the Conejo Grade.

Another objective of the IRP was to couple the GIS with a simulation model to enable the IRP participants to test various policy options and explore their benefits and impacts. The coupled GIS simulation model will be capable of displaying current and future land-use patterns, relative concentrations of jobs and housing, and key indicators reflecting the impact of policy changes and other implementation strategies. A separate technical report describes the simulation model, developed by the Economic Forecast Project at University of California Santa Barbara, which is used to forecast jobs, housing, and change in work force commuters under different growth and transportation assumptions.[78]

The current jobs housing conditions were determined using GIS-based traffic analysis zones (TAZ), housing, and employment coverage. With this information, the jobs and housing relationships and imbalances have been examined and identified for various scopes of geography including the region and city as well as by TAZ. The resulting information is used to identify geographic areas and jurisdictions where there is need to develop policy to address these imbalances.

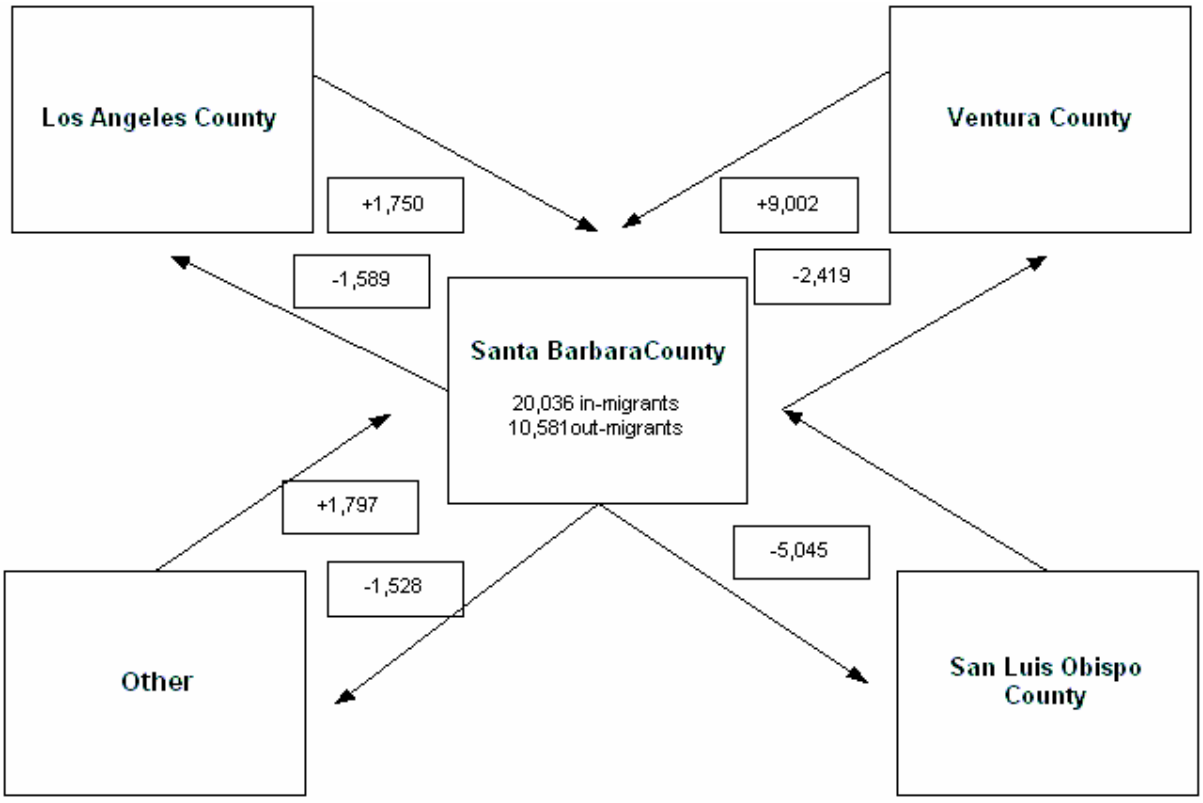
[78] Santa Barbara County Association of Governments, *Taking Action Regionally – Technical Information and Supporting Documentation*, July 2004, Pg. C-2.

In addition, the GIS has been used to evaluate future jobs-housing relationships and identify geographic areas where policy may be needed. The TAZ-based coverage includes 2010, 2020, 2030 forecasts used in SCAG (for Ventura County) and SBCAG traffic models. This information shows where anticipated growth may occur and where existing imbalances may be exacerbated. The TAZ-based "Adopted Growth Forecast" uses a base case scenario for Ventura and Santa Barbara County that has been approved by the SCAG and SBCAG governing boards. GIS based thematic maps have been developed from this scenario. The Western Ventura County jurisdictions jobs and housing are well balanced on the TAZ level.

Summary of GIS Analysis

The Census Transportation Planning Package (CTPP) place level Part 3 worker flow from place of residence to place of work is summarized below. Based on the year 2000 Census data the following figure shows 9,000 workers from Ventura County commuted to Santa Barbara County jurisdictions to work. Additional figures show the communities of Santa Barbara, Carpinteria and Goleta with 3,635, 1,600, and 1,649 workers respectively saw the majority of the commuters from Ventura County, shown on the figure below. There were also 2,400 workers from Santa Barbara that commuted to Ventura counties jurisdictions to work. Ventura, Oxnard, and Camarillo with 890, 463 and 208 workers respectively saw the majority of the commuters.

Inter-County Workers, 2000 Census



Additional Findings and Projections:

- The potential for significant employment increase in Goleta, associated with service/industrial employment, and in the Carpinteria Valley due to additional greenhouse development is forecast for South Coast of Santa Barbara.
- In housing, the forecast is no significant growth, with the exception of the UCSB area that has proposed student and faculty housing.
- A higher proportion of housing relative to jobs is forecast for the Santa Maria Valley, and this proportion increases over time reflecting continued housing development.
- A large percentage of employment is in the unincorporated area reflecting the agricultural base of the local economy.
- Employment at Vandenberg Air Force Base, (Santa Barbara County) is significant and the workers, many of them civilians, look elsewhere for housing even though the base has a significant expanse of land and areas designated for military residential use.
- The additional employment generated from the expanding Santa Ynez Gaming Casino may indicate that that lower paid service workers may have to look elsewhere for housing look elsewhere for housing.

Inter-Regional Policy Model (IRPM)

The IRPM was developed to permit government agencies and other interested parties to test different policy scenarios regarding future job conditions and housing production and the potential effects on interregional commuting and the region's transportation system. The model considers the tools available to city and county governments and regional transportation agencies such as the SBCAG and the Ventura County Transportation Commission. The specific variable factors in the model are:

- Housing production;
- Amount of commercial (non-residential) development, and,
- Transportation improvements, including rail service, bus service, and the number of freeway lanes in the region's main corridor, Highway 101.

With the guidance of the IRP Policy Steering Group, eight policy scenarios were evaluated by assessing the impact of alternate policy mixes on commuting and the economy in 2010. These scenarios were really six different scenarios, including two variations of two of the scenarios. One additional scenario using the SBCAG Regional Growth Forecast was also evaluated by the model. The scenarios were:

1. Baseline (continuation of current policies);
2. Increased housing production (emphasis on affordable and workforce housing);
2a. Increased housing with emphasis on preference for housing local workers;
3. Increased job growth (in north Santa Barbara and Western Ventura counties);
4. Enhanced Transportation Improvements;
5. "Markets Rule" (more market-rate housing than 2 and 2a);
6. Balanced Improvements (more jobs from #3 and more transportation improvements #4);
6b. Balanced improvements with emphasis on preference for housing local workers; and,
7. SBCAG Regional Growth Scenario.

The eight primary scenarios were run through the model and the following significant patterns, trends and conclusions were found:[79]

The baseline scenario predicts the number of commuters per day would increase by little more than 11,000 persons – about six percent of the average annual daily traffic count on Highway 101. This places Highway 101 at overcapacity between Western Ventura and the South Coast of south Santa Barbara, but well within capacity in north Santa Barbara counties.

- In most scenarios, the vast majority of increased commuting occurs between north Santa Barbara and SLO counties, where there is much more road capacity. However, because the Western Ventura-South Coast link on Highway 101 is currently congested, any scenario that does not include transportation improvements there will lead to overcapacity usage.
- The only scenarios that significantly reduce commuting relative to the baseline are 2 and 2a, which both assume increased housing production, especially for the workforce. This is due mostly to the virtual elimination of new commute trips between north Santa Barbara and SLO counties.
- Commuting increases most under the scenarios (3, 6, and 7) that assume increased job growth. Scenarios 3 and 6 call for higher job growth in sub-regions other than the south Coast. Under the increased job growth assumption, home prices in the other sub-regions are bid up because commuters are competing for housing with local job holders. This leads to yet more commuting, especially between north Santa Barbara and SLO counties. Local housing preference does not alter this dynamic much.
- The two scenarios that assume transportation improvements (scenario 4 and scenario 6) show a short-term improvement in the volume-to-capacity ratio on Highway 101 because of expanded freeway capacity.
- Commuting also increases considerably under scenario 7, the SBCAG Regional Growth Forecast, principally because of increased job growth in both Santa Barbara County sub-regions, and a different job mix that assumes high wages and household incomes in the South Coast.
- Scenarios 2 & 2a (housing) were found to generate the fewest new commuters for many reasons, including lower job growth and higher housing production, which leads to lower housing prices than in the baseline. Also, the emphasis on affordable and workforce housing means more jobholders are able to afford houses near their jobs. This scenario would almost certainly require local jurisdictions in the South Coast to change zoning of many vacant parcels from commercial or industrial to residential. Also, preference for housing local workers is what really gives new housing policy some impact on commuting. Almost all of the approximate 3,700 fewer commuters in the "2a" version of this scenario is due to the local preference units.

The previous scenarios are from the forecasts run out only to 2010, a mere six years from the time of the analysis, and therefore reflect short-term, rather than long-term, improvement. Although scenarios 2 and 2a generated the least additional congestion, given the fact that portions of the Santa Barbara-Ventura region are land-poor, construction of substantial additional housing might not be a viable long-term alternative.

[79] Inter-regional Partnership for Jobs, Housing, and Mobility, Part 2: Technical Information and Supporting Documents, Results Across Scenarios, Pg. A 11.

Constraints and Opportunities Affecting Jobs-Housing Balance

The relationship between the location of jobs and the types and cost of available housing is becoming a significant issue in most metropolitan areas in California. However, within Western Ventura and Santa Barbara counties, this spatial and economic mismatch is reaching crisis proportions.

The Santa Barbara/Ventura County line (and, in some cases, other jurisdictional boundaries) functions as a kind of dividing line when it comes to communication and collaboration. There is little or no apparent ability for common approaches to permeate between the cities and counties that lie on either side of that jurisdictional watershed point – geographically, jurisdictionally, and culturally. Even within each county, cities don't communicate or collaborate with each other or the county within which they reside. This lack of communication is also reflected to a lesser degree by non-governmental organizations and community interest groups as well. As a result, opportunities for joint gains and collective influence are passed over. Yet at the same time there are significant common values and complementary skills on both sides of this divide. These assets hold considerable promise for an alliance or coalition that can speak with a clear and coherent voice to each other as well as their counterparts in the State legislature regarding regional needs and funding for change. As a starting point, issues of critical importance, which deserve attention by the region include: success stories in the provision of affordable and work force housing, the need for State and federal funding to support inter-regional rail and transit, and retention of businesses and local industries. (For further details, see Section IV, Call to Action.)[80]

Much like the Pogo cartoon character, who said, "We have met the enemy and he is us," an assessment of these conditions has uncovered more basic and troubling challenges, most notably:

- There is an overall lack of ownership of the problem by the community at large.
- Piecemeal efforts to fund specific strategies to ameliorate the problem have had little effect in addressing the cumulative situation. No single entity, organization or agency has enough control or influence to unilaterally address these issues successfully.
- In spite of the existence of regional coordinating agencies, regional collaboration efforts across municipal and county lines have thus far been either non-existent or ineffective.
- The area may not have the population mass necessary to successfully support increased bus service nor high-capacity transit alternatives such as rail.
- The processes and costs we have layered on new development—designed to ensure that individual interests are balanced with community interests—have become impediments to creative and more affordable solutions.
- Recent efforts to expand the stock of housing affordable for current residents or local employees have met with strong opposition from neighborhood groups, evidencing the perception that increasing the supply of housing will attract "outsiders" and worsen environmental indicators such as traffic congestion and noise.

[80] Santa Barbara County Association of Governments, *Taking Action Regionally, Inter-Regional Partnership for Jobs, Housing & Mobility*, July 2004, Pg. 17.

Without a longer view of the regional environment and the "regional neighborhood," communities may actually lose their autonomy and be faced with uncertain safety, service and support levels of public and private infrastructure previously taken for granted. Hence, quality of life indicators are projected to suffer ever more. [81]

Findings

Focused research, demographic trends and GIS undertaken by the regional transportation and local land-use planning agencies has shown that the region's high housing prices have resulted in:

- **Long-Distance Commutes**: Greater distances and increased congestion have caused at least a doubling of inter-regional commute times in the past ten years.
- **Loss of Critical Service Workers**: Nurses, teachers, police officers, firefighters and others cannot find affordable housing on the South Coast and have moved out of the area.
- **Degradation of Business and Job Climate**: Loss of tradable goods companies; artificially high prices for local goods and services; demands for higher wages; an inability to hire qualified professionals.
- **Change in Demographic Composition:** Both the middle class and the numbers of people in the middle age groups has decreased in some areas, accelerating the trend toward a "two-tier" economy, while younger and older age groups are increasing, triggering a demand for non-suburban types of housing.
- **High Density/Low Density Households:** Many people who cannot afford to commute have doubled up, thus forcing more individuals and families into substandard housing and significantly increasing the demand for social services in concentrated areas. Simultaneously, a depopulation of some suburban neighborhoods is occurring as younger generations move out while older citizens continue to live in family-size homes.
- **Impacts on Quality of Life and Community Participation:** People who commute long distances have less time to participate in their home communities, while the community where they do work has less significance to them.

A better jobs-housing balance over time would indicate that one or more underlying problems are being addressed. Studies in other areas, for example, have demonstrated that census tracts with fairly equal numbers of jobs and employed residents experience significantly shorter commute times than unbalanced tracts. Other underlying problems may still persist. Even if a more desirable ratio is achieved, which implies a better balance between incomes and the cost of housing, the housing may still require a higher-than-preferred proportion of total household income. In 2000, for example, one-half of all renters and one-third of all home-owners in Santa Barbara County were spending more than 30 percent of their income on housing. The comparable figures are considerably worse today. [82]

[81] Santa Barbara County Association of Governments, *Taking Action Regionally – IRP Final Report*, July 2004, Pg. 6.
[82] Santa Barbara County Association of Governments, *Taking Action Regionally – IRP Final Report*, July 2004, Pg. B-13.

Policy Recommendations

It is of interest that members of the Policy Steering Group (PSG) attached their signatures to the document stating that the Group"...wholeheartedly, as individuals, support the recommendations of this report and urge its timely implementation."

The policy recommendations of the Project Team and the PSG are made up of a set of seven core policies and an explicit set of immediate and near-term implementation steps intended to serve as a "catalytic communication process" to transform its inter-regional partners from onlookers to team strategists. Just as every campfire starts with a bit of kindling and springs into a source of heat, energy and output, so does the focused advancement of the IRP the Steering Group have envisioned.

These recommendations are based upon five key assumptions that communities and the entire region need to consider.

1. The overall area's population is increasing through both net immigration and natural increase (births over deaths). There is no local mechanism that will halt the pressure for further internal and external growth from occurring.
2. No one city or region will be able to buffer itself from the impacts of continued development and redevelopment. Nor can we "build our way out" of these growth pressures.
3. Regional problems require regional solutions.
4. Meaningful change will require the development of IRPs and alliances that heretofore have not been nurtured.
5. "Big Picture" policy changes will require a regional approach that can effectively exert political influence at the state-level through strategic cooperation at the local level.

These policy recommendations represent the core strategies that should be utilized by elected officials, community leaders and community organizations to address the existing and emerging problems that are adversely affecting the quality of life for residents, workers, business and industry within the two-county region. Within each policy area, strategies are described in terms of the problems, challenges and opportunities they are intended to address as well as both timing (immediate or near term) and priority.

First and foremost, it was recommended that the policies outlined within each of the seven topical clusters be adopted by both the Ventura Council of Governments and SBCAG as formal regional policies that begin addressing housing, economic development and mobility concerns. Policy recommendations listed under "Immediate Action Steps" are each high-priority recommendations, capable of being implemented without delay.

IRP Strategies

The SBCAG IRP identified the seven below core policy areas. Each policy area is tied to immediate and short-range strategies that the IRP plans to address.

- Inter-Regional Communication and Collaboration
- Advancing Housing Policy That Reflects Regional Priorities and Perspectives
- Integrating Regional Thinking Into Job Creation and Economic Development
- Local Permit Processing and Streamlining Improvements
- Supporting ongoing Programs to Address Congestion
- Public Education and Involvement Opportunities
- Legislative Advocacy for Change

Internal Evaluation of Strategies

The SBCAG Policy Steering Group (PSG) reviewed several implementation strategies over the year that they met. The goals listed do not represent an explicit consensus of the PSG as a complete list of proposals, but serve as a starting point for further discussions among housing advocates, community-based organizations, neighborhood groups, and local agency representatives and elected officials. It is important to acknowledge that many of the local agencies within the two-county region have updated Housing, Circulation and Land Use Elements which address many of these issues. Depending upon the resources of and external factors facing local agencies, it is hoped that these "talking points" are projected help to further the discussion of jobs, housing and mobility issues as they affect each localities planning, community development and overall pursuit of an improved quality of life.[83]

Role of Public, of Participating Jurisdictions, of Local Resources

A number of community-based organizations have prepared policy papers, guidelines and strategies oriented toward addressing many of the same issues that this report addresses.[84] While not exhaustive, those organizations include: Goleta Housing Leadership Council, Housing Action Coalition, Coastal Housing Partnership, Homebuilders Association of the Central Coast, Housing Technical Working Group, Santa Barbara County Home Consortium, Santa Ynez Valley Blueprint, South Coast Livable Communities, Santa Barbara Region Economic Community Project, Faith Initiative, Housing Opportunities Made Easy, and the Agricultural Policy Working Group.

Many of the action steps and policy prescriptions noted below track closely with the recommendations of these organizations. Accordingly, one or more of these organizations may play a key role in future inter-regional collaboration to implement one or more of the specific proposals outlined below. The table on page 72 which follows the specific policy recommendations outlines potential implementation and funding partners for the Immediate Action Steps referenced. The table on page 77 outlines this same information for near-term

[83] Santa Barbara County Association of Governments, *Taking Action Regionally – Technical Information and Supporting Documentation*, July 2004, Pg. D-1.
[84] Santa Barbara County Association of Governments, *Taking Action Regionally, The Inter-Regional Partnership for Jobs, Housing and Mobility*, Pg. 15.

action steps. It is important to note in reviewing Tables 2 and 3 that the Ventura County Transportation Commission has the lead responsibility with regard to regional transportation issues in Ventura County, as does SBCAG in Santa Barbara County; whereas the Ventura and Santa Barbara COGs have primary responsibility for regional issues including housing and demographic use matters.

Final Internal Assessment of Outcomes – Conclusions

As noted at the beginning of this report, this process has been funded by the Department, with supplementary funds being provided by Santa Barbara and Ventura counties. Currently (July, 2004), there is no source of funding to continue these efforts or implement the recommendations of this report. However, the consistent theme of feedback from community and business leaders is that this effort should continue into the future as outlined within this and previous chapters. Given the severity of the problem and the current and emerging trends identified within the section addressing Existing Conditions and Modeling Results, it is clear that a Phase II for interregional cooperation and action is warranted.

It is recommended that regional and local governmental agencies, transit authorities, chambers of commerce, larger employers, community-based organizations and foundations actively explore ways of pooling financial and "in-kind" resources to continue these efforts and begin the implementation process. Such an approach could serve as the basis for a funding proposal.

The policy prescriptions and implementation strategies outlined within this report form the basis for moving beyond insular approaches to solving problems in a parochial and case-by-case manner to a new more integrated and sustainable paradigm of leveraging the diversity of thinking and problem solving techniques of the broader region as a whole. Without such an approach, the long-term aggregate costs of continued incremental thinking are projected take its toll on the health, vibrancy, economy and security of the region at large.[85]

Final Note

In the November 2004 elections, the voters of County of Ventura, one of the areas under study in this emerging IRP, voted on a county wide transportation initiative, Measure B. The proposed Measure B would have imposed a retail sales and use tax of one-half of one percent (0.5 percent) throughout Ventura County, which would remain in effect for thirty (30) years. Funds were targeted for acquisition, construction and maintenance of streets, roads, highways and public transit, to fund transportation projects and programs set forth in the Ventura County Transportation Commission Expenditure Plan. Measure B failed to pass with less than 42 percent of the County's electorate supporting passage.

[85] Santa Barbara County Association of Governments, *Taking Action Regionally, The Inter-Regional Partnership for Jobs, Housing and Mobility*, Pg. 33.

The Immediate Strategies and Action Steps: [86]

Inter-Regional Collaboration Steps	Housing Policy Action Steps	Jobs and Economic Development	Process Streamlining Action Steps	Congestions Relief Steps	Education and Outreach Action Steps	Legislative Advocacy Steps
Policy #1: *Engage regional and local governments, civic organizations, and businesses in an ongoing regional discussion of next steps.*	***Policy #1:*** *Build community support for specific approaches or initiatives that direct local agencies to permit and developers to construct a range of housing types that more closely match demographics of local communities.*	***Policy #1:*** *Require local preference to the greatest extent allowed by law that new housing opportunities be directed at local residents and to those already working in local communities.*	***Policy #1:*** *Designate staff coordinators to facilitate interdepartmental permit processing and environmental review of projects that address regional jobs-housing issues.*	***Policy #1:*** *Initiate discussions between Ventura County Transportation Commission and SBCAGs to jointly pursue state and federal funding of inter- county transit and passenger rail enhancements, and other near- term transportation improvements.*	***Policy #1:*** *Establish a clearinghouse within SBCAG and within VCOG for housing initiatives in order to facilitate collaboration, and play to the unique strengths of organizations and agencies addressing local and regional housing challenges*	***#1:*** *Prioritize a regional approach to legislative advocacy as a near term strategy to guide regional cooperation. Facilitate joint meetings among existing public and private- sector advocacy organizations in Santa Barbara and Ventura Counties to identify opportunities for strategic alliances.* .

[86] Santa Barbara County Association of Governments, *Taking Action Regionally, The Inter-Regional Partnership for Jobs, Housing and Mobility*, Pg. 34.

(continued)						
Inter-Regional Collaboration Steps	**Housing Policy Action Steps**	**Jobs and Economic Development**	**Process Streamlining Action Steps**	**Congestions Relief Steps**	**Education and Outreach Action Steps**	**Legislative Advocacy Steps**
Policy #3: *Convene meetings with regional councils of chamber of commerce representatives from the two regions to initiate a dialogue about narrowing the separation between job- creation and housing provision.*	***Policy #3:*** *Encourage local agencies, housing developers, larger employers, not- for-profit foundations and others to jointly establish local waiting lists for below- market rental and purchase housing.*		***Policy #3:*** *Utilize Specific Plans and other planning and land use tools to simultaneously establish pre-entitlements and implement a programmatic level of environmental review that pre- mitigates significant impacts.*	***Policy #3:*** *Initiate the development, funding and use of videoconferencing centers as satellite work/ conferencing stations by business, business parks, industry and government.*	***Policy #3:*** *Engage and support community-based organizations such as the Ventura County Civic Alliance and Santa Barbara Economic Communities Project in public outreach and education efforts oriented.*	***Policy #3:*** *As part of the 2004- 2005 budget discussions, seek immediate reform to protect local revenues. Share county and municipal resources to identify the direct and indirect implications of the currently proposed Governor's Budget on local agencies and their budgets.*
	Policy #4: *Support statewide efforts for further 'construction defect liability reform' legislation to facilitate development of new multi family units.*		***Policy #4:*** *Negotiate processing timelines between agencies and use interagency review panels to expedite the reviews of projects proposed near municipal boundaries.*			

Near Term Action Steps[87]

Inter-Regional Collaboration Steps	Housing Policy Action Steps	Jobs and Economic Development	Process Streamlining Action Steps	Congestions Relief Steps	Education and Outreach Action Steps	Legislative Advocacy Steps
Policy #4: *Establish a series of formal and informal meetings or work sessions between elected and appointed officials (boards of supervisors, city councils, planning commissioners, etc.) that address the strategic advantages of regional or sub-regional initiatives.*		***Policy #2:*** *Develop job resource centers at the community college level that seek to recruit high- end jobs and then provide job training to ensure local workforce can succeed. Link workforce development with community colleges.*	***Policy #5:*** *Support efforts to refine CEQA such that jobs-housing imbalance implications are addressed as a part of the analysis of "Indirect Effects" and/ or "Growth Inducement" within*	***Policy #4:*** *Require employer- based transportation demand management strategies to be undertaken in business parks and all businesses with greater than 25 employees.*	***Policy #4:*** *Establish working partnerships with the Ventura/ Santa Barbara County media to report on regional issues and highlight success stories in addressing jobs, housing and mobility issues.*	***Policy #4:*** *Pursue the development of a legislative bill similar to AB723 that seeks to operationalize approaches developed by Inter- regional partnerships (in Bay Area/ Central Valley) to create a tax-increment financing mechanism for designated jobs-housing opportunity zones.*
Policy #5: *Explore the use of video-conferencing facilities within Ventura and Santa Barbara Counties as a vehicle for interregional dialogues and collaboration*	***Policy #5:*** *Seek legislative recognition (see Legislative Advocacy, below) of the need to subsidize housing for households earning up to 200% of median family income in high housing cost areas.*	***Policy #3:*** *Develop and implement incentives to move businesses to where workers live; explore remote site employment centers.*		***Policy #5:*** *Initiate general plan and zoning ordinance revisions to intensify land use densities (via minimum density standards) along arterial transportation corridors.*	***Policy #5:*** *Implement a comprehensive package of public education and community outreach activities to raise the level of understanding of existing housing and jobs-balancing efforts and initiatives. Utilize print and television media to highlight success stories.*	***Policy #5:*** *Support the proposed League of Cities initiative on the November ballot that protects local revenues from state raids.*

[87] Santa Barbara County Association of Governments, *Taking Action Regionally, The Inter-Regional Partnership for Jobs, Housing and Mobility*, Pg. 39.

(continued)

Inter-Regional Collaboration Steps	Housing Policy Action Steps	Jobs and Economic Development	Process Streamlining Action Steps	Congestions Relief Steps	Education and Outreach Action Steps	Legislative Advocacy Steps
Policy #6: *Sponsor issue- specific forums and community summits directed at exploring specific approaches and housing initiatives and congestion management*	***Policy #6:*** *Provide for easier entry into market and below-market housing for prospective homebuyer through 40- year mortgages, cost- and equity- sharing with equity partners, and longer- term affordability provisions.*	***Policy #4:*** *Provide funding to support schools' ability to include trades education in their curriculum in order to attract and retain wage- earning families.*		***Policy #6:*** *Connect transit at inter-regional, regional and local levels and facilitate movement between systems by reducing inter- modal headways at transit centers; support and fund closer route coordination and scheduling.*		***Policy #6:*** *Establish new alliances between governments, business and non- profit institutions and organizations to articulate regional benefits and complimentary local solutions to issues related to open space preservation, environmental management, water quality issues and transportation/ mobility issues.*
Policy #7: *Institute semi- annual joint planning commission meetings between adjacent jurisdictions to discuss proposed large development projects and impending changes to General Plans.*	***Policy #7:*** *Build community support for specific approaches or initiatives that direct local agencies to permit and developers to construct a range of housing types that more closely match the demographics of local communities.*			***Policy #7:*** *Increase capital investment for additional equipment to provide mass transit opportunities (bus and rail) between Ventura, Lompoc, and the Santa Barbara South Coast.*		***Policy #7:*** *Sponsor forums between elected and appointed state representatives and local officials and community leaders to improve communication and maximize regional accountability of legislative representatives. Develop grass- roots support for specific regional initiatives.*

(continued)

Inter-Regional Collaboration Steps	Housing Policy Action Steps	Jobs and Economic Development	Process Streamlining Action Steps	Congestions Relief Steps	Education and Outreach Action Steps	Legislative Advocacy Steps
Policy #8: *Designate a bi- county task force to study, recommend and support proposals for a regional and inter-regional revenue plan including tax- sharing arrangements*	***Policy #8:*** *Adopt revisions to land use and design standards that result in more compact development and that specify a higher range of mini mum density standards in urban areas.*			***Policy #8:*** *Establish an incentive program for housing and mixed use development near transit corridors and employment centers.*		***Policy #8:*** *Support continued State funding and establishment of Jobs-Housing Balance Improvement efforts as a permanent state program. Broaden scope to include interregional economic growth, environmental issues, jobs-housing imbalance.*
	Policy #9: *Address jobs-housing relationships in the review of General Plan updates and amendments and review of large commercial/ industrial projects.*					***Policy #9:*** *Encourage the State Housing and Community Development Department to develop a partnership approach with regional and local agencies to produce a variety of housing types*
	Policy #10: *Insure any permit reservation system used as a means of controlling growth must use jobs-housing balance as a performance criterion or goal.*					***Policy #10:*** *Develop and forward initiatives that integrate housing open space and transportation solutions at the local and regional level*

(continued)

Inter-Regional Collaboration Steps	Housing Policy Action Steps	Jobs and Economic Development	Process Streamlining Action Steps	Congestions Relief Steps	Education and Outreach Action Steps	Legislative Advocacy Steps
	Policy #11: *Consider increasing residential opportunities in communities where the jobs-housing balance ratio is greater than 1. 35: 1.*					
	Policy #12: *Pursue a mutual agreement between the local agencies within the two- county region that each jurisdiction will pursue a level of housing production that equates to their own housing demands (work force + natural increase).*					.

SACRAMENTO AREA COUNCIL OF GOVERNMENTS (SACOG) IRP Blueprint Project[88]

Project Description

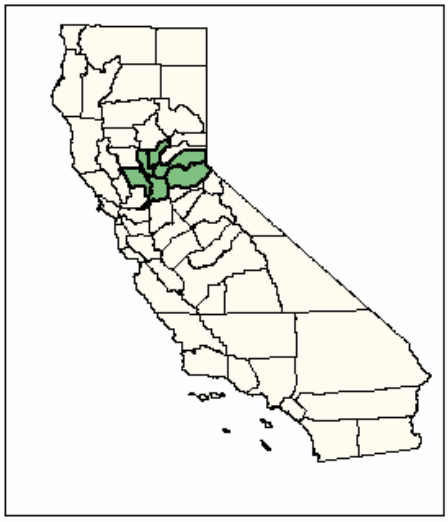
Funded in part by the IRP Planning Grant from the Department and created in collaboration with local stakeholders, the SACOG developed four alternative land-use scenarios from which one will be selected to guide development in the Sacramento region through a period of extraordinary growth. Sacramento region's Blueprint Project is a comprehensive examination of land-use patterns in the Sacramento region, using state-of-the-art modeling tools to estimate transportation, air quality, economic and other effects of current land-use patterns, and develop alternatives to those patterns for future growth and a more effective regional transportation system. Through an aggressive outreach strategy the Blueprint Project involved thousands of residents region wide in developing a preferred regional land-use vision for local government officials to use in making transportation and land-use decisions.

SACOG is a COG formed under a joint powers agreement between six counties (including 22 cities) in northern California: El Dorado, Placer, Sacramento, Sutter, Yolo, and Yuba. The SACOG Board of Directors, elected officials representing its member governments, recognize that transportation, land-use, and the jobs-housing balance are linked and must be planned in a careful and coordinated manner. SACOG's primary charge is to manage RTP and funding, as well as provide a forum for the study and resolution of regional issues. In this role, SACOG implements the following functions:

- Prepares the region's long-range transportation plan;
- Plans distribution of affordable housing around the region;
- Keeps a region-wide database of regionally significant or federally funded transportation projects for its own and local agency use;
- Helps counties and cities use federal transportation funds in a timely way; and
- Assists in planning for transit, bicycle networks, clean air and airport land uses.[89]

SACOG embarked on a two-year process during which 5,000 community members – including government officials, developers, environmentalists and business leaders – collaborated to develop the award-winning transportation and land-use study known as the Blueprint Project. This project is created within a framework of public outreach and involvement, and provided a vision of how the Sacramento region should grow and change in the future.[90]

[88] Sacramento Council of Governments, *Sacramento Blueprint: Transportation/Land Use Study, Final Report*, June 30, 2004.
[89] Ibid, Pg. 1.
[90] Ibid, Pg. 1.



Study Area Counties: El Dorado, Placer, Sutter, Sacramento, Yolo, Yuba, including 22 cities

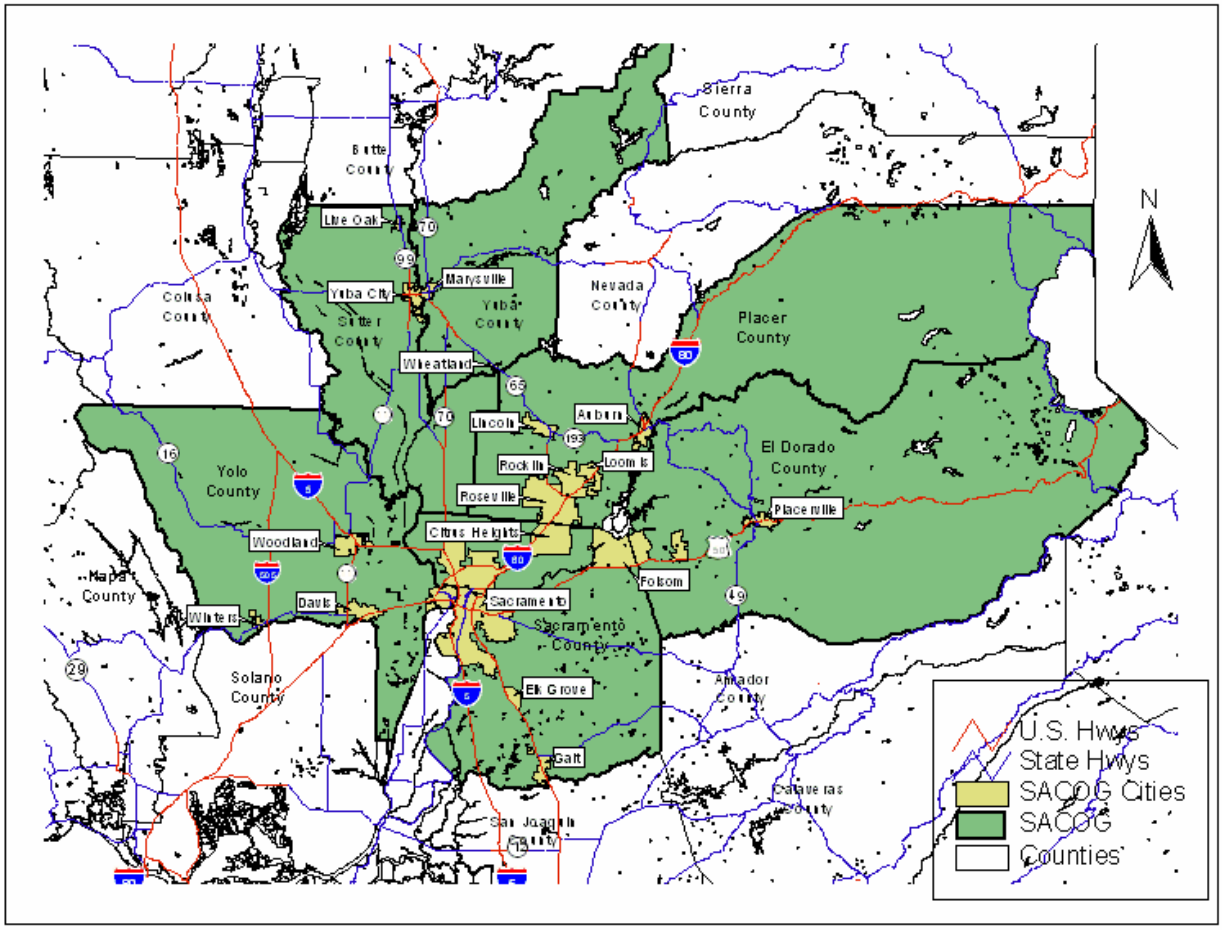
Total Population 2004: 2,130,418

Total Households 2004: 679,195

Square Miles: 8,126

Major Highways: Interstate 80, US Hwy 50, Hwy 99, Interstate 5

SACOG IRP Study Area



Methodology

Using state-of-the-art modeling tools to project transportation, air quality, economic and other impacts of current land-use patterns, the Blueprint Project employs PLACE3S technology to create maps that optimize the region's transportation system and mitigate sprawl, with a particular emphasis on creating a better jobs-housing balance in the region. SACOG's modeling tools included GIS technology, SACOG's existing travel forecasting tools (the SACMET model and the Yuba-Sutter area model), and "PLACE3S," a web-based planning program. PLACE3S was the centerpiece of the community, county and regional planning public workshops.

SACOG had used population, housing and employment projections through the year 2025 in the travel demand forecasts made for the Metropolitan Transportation Plan (MTP) 2025. The major assumption of these projections is that adopted general and specific plans from area jurisdictions provide an accurate depiction of future growth. In these plans residential land is almost completely consumed by 2025. The supply of commercial land, on the other hand, is much larger than demand over this time period.[91] Through the new information provide by Blueprint Project, SACOG modified their MTP. The MTP adjustments updated the plan from the traditional transportation modeling assumptions to the customized Blueprint projections.

PLACE3S software allowed immediate illustrations of the effects of expanded or limited development, through varying traffic projections, housing densities and other factors, and gives the user an appreciation for the consequences of alternative growth. The software made it possible to do real-time countywide and region-wide modeling in public meetings, and is usable by anyone with a computer and a browser, making it easy to manipulate during the community workshops.

In the community workshops, PLACE3S allowed citizens to apply these new skills to the familiar streets and lots of their own communities and counties. The PLACE3S computer-assisted planning tool was used to scale up from small parcels to the six-county region, allowing participants see their local input contributing to the regional growth scenarios during the workshop. When citizens clearly see their own neighborhood's roots in the larger regional plan, they gain greater understanding of the benefits of well-informed regional cooperation which fosters more durable civic engagement.[92]

A "Base Case" scenario estimates what would happen if recent (1998-2002) land-use decisions were replicated through 2050. The remaining three scenarios anticipate different combinations of land-use planning, especially mixed-use, redevelopment, infill and transit-oriented development, to combat the increasing imbalance of jobs and housing. [93] These scenarios are defined in the table on page 84.

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[91] Sacramento Council of Governments, *Final Interim Metropolitan Transportation Plan*, October 24, 2004, Pg. 67.
[92] Sacramento Council of Governments, *Sacramento Blueprint: Transportation/Land Use Study, Final Report*, June 30, 2004, Pg. 12.
[93] Ibid, Pg. 1.

BLUEPRINT REGIONAL LAND-USE TRANSPORTATION SCENARIOS KEY STATISTICS[94]

PLANNING THEMES	SCENARIO A Future development same as recent past (fairly low density). Outward growth pattern, jobs-housing imbalances in sub-areas	SCENARIO B More housing choice, some growth through re-urbanization, mix of land uses, cities on "edge get the most growth	SCENARIO C Slightly higher housing densities and re-urbanization than B, mix of land " uses, "inner ring" areas get the most growth	SCENARIO D Highest housing densities and re-urbanization levels, mix of land uses, "core" areas get the most growth
Population by County in 2050				
El Dorado	285,000	187,000	187,000	187,000
Placer	584,000	561,000	603,000	511,000
Sacramento	2,155,000	2,282,000	2,364,000	2,460,000
Sutter	193,000	170,000	160,000	163,000
Yolo	399,000	405,000	350,000	337,000
Yuba	201,000	212,000	153,000	159,000
Region	3,817,000	3,817,000	3,817,000	3,817,000
Percent of Region's New Growth (jobs + houses) through 2050				
El Dorado	7%	3%	3%	3%
Placer	21%	19%	21%	16%
Sacramento	48%	53%	57%	63%
Sutter	5%	5%	5%	4%
Yolo	13%	12%	10%	9%
Yuba	6%	8%	5%	5%
Housing Type: Growth through 2050				
Rural Residential (5% existing)	4%	1%	1%	1%
Single Family Large Lot (63% existing)	76%	32%	29%	23%
Single Family Small Lot (3% existing)	2%	32%	30%	35%
Attached (29% existing)	18%	35%	40%	41%

[94] Sacramento Council of Governments, *Sacramento Blueprint: Transportation/Land Use Study, Final Report*, June 30, 2004, Pg. 8.

(continued)

PLANNING THEMES	SCENARIO A Future development same as recent past (fairly low density). Outward growth pattern, jobs-housing imbalances in sub-areas	SCENARIO B More housing choice, some growth through re-urbanization, mix of land uses, cities on "edge get the most growth	SCENARIO C Slightly higher housing densities and re-urbanization than B, mix of land " uses, "inner ring" areas get the most growth	SCENARIO D Highest housing densities and re-urbanization levels, mix of land uses, "core" areas get the most growth
All Housing TYPES in 2050				
Rural Residential (5% existing)	5%	2%	3%	3%
Single Family Large Lot (63% existing)	68%	46%	45%	42%
Single Family Small Lot (3% existing)	2%	19%	17%	20%
Attached (29% existing)	25%	33%	35%	36%
% Growth through Re-investment	0% jobs	7% jobs	7% jobs	15% jobs
(i.e. new construction on lots with buildings today)	0% housing	7% housing	10% housing	18% housing
% Growth w/in 1/4 mile of 15 minutes	5% jobs	32% jobs	40% jobs	44% jobs
(or more frequent) transit services (train, bus)	2% housing	27% housing	35% housing	35% housing
% Growth through Infill (vs. Greenfield)	50% jobs	55% jobs	57% jobs	62% jobs
	27% housing	39% housing	38% housing	44% housing
Jobs per Household for Growth				
(1.2 = regional average)				
Placer County	1.6	1.5	1.5	1.6
Sacramento Co.-south of American River	0.7	1.1	1.1	1.1
Sacramento Co.-north of American River	1.3	1.2	1.1	1.4
Sacramento County - Sac. City downtown/east Sa	38.8	2	1.7	1.7
Sutter County	0.7	1.3	1.6	1
Yolo County	1.4	1.2	1.3	1.2

Existing Conditions

- **Population:** The population of the six-county region, in 2004 was 1.8 million.[95] This represents one of California's fastest growing regions.
- **Jobs:** The recently incorporated City of Rancho Cordova has emerged as a second major job center, rivaling downtown Sacramento, and Roseville in fast growing Placer County, is not far behind. Two-worker households have become the norm, with extensive commuting from one community to another. [96]
- **Transportation:** People travel overwhelmingly by automobile: driving alone accounts for 50 percent of trips, 43 percent of trips are by auto with two or more occupants, six percent are bicycle or walk trips, and one percent of trips are by transit (with peak transit use at 14 percent into downtown Sacramento during commute hours).[97] The pattern of suburban growth projected for the region coupled with personal preferences about trip destinations, routes, combining of trips, and choice of how to travel yield longer average trips, leading to both vehicle trips and VMT exceeding population growth over the 25-year planning period. It appears that increasing suburbanization is one major factor leading to more driving; in the suburbs, there are fewer travel options and longer distances to travel due to lower building densities.[98]
- **Jobs-Housing Imbalance:** Sacramento County (in particular, the Cities of Sacramento and Rancho Cordova) and selected surrounding jurisdictions (West Sacramento, Loomis, Live Oak, Roseville), on average, far exceed the region's desired jobs-housing ratio of 1.2. Other housing-rich jurisdictions, such as Galt, Citrus Heights, Elk Grove and Rocklin, fall short of a 1.0 ratio.[99]
- **Projected Jobs-Housing Imbalance:** By 2050, the Sacramento region will grow by more than 1.7 million more people (bringing the total to 3.7 million), 1 million new jobs, and 840,000 more homes. Overall, the region currently averages 1.13 jobs per housing unit, a ratio that ranges from 0.55 in Citrus Heights to 1.85 in Roseville, hitting 5.33 in downtown Sacramento. The Base Case Scenario shows this trend getting worse (see the table on page 89).[100]
- **Residential Preferences:** Residents in the SACOG region have indicated that they prefer to either own or rent single-family large-lot homes, a preference that also contributes to the low-density development characteristic of the region's growth model. According to the Metro Chamber Housing Survey of 2003, 43 percent indicated they prefer large-lot homes. Still, a large proportion (31 percent) favor single-family small lot homes and 25 percent chose attached residential housing – townhouses, condominiums, apartments or mixed-use – that is characteristic of high-density development.[101]

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[95] Sacramento Council of Governments, *Sacramento Blueprint: Transportation/Land Use Study, Final Report*, June 30, 2004, Pg. 6.
[96] Ibid, Pg. 6.
[97] Ibid, Pg. 6.
[98] Sacramento Council of Governments, *Final Interim Metropolitan Transportation Plan*, October 24, 2004, Pg. 103.
[99] Ibid, Pg. 6.
[100] Ibid, Pg. 9.
[101] Ibid, Pg. 6-7.

Constraints and Opportunities Affecting Jobs-Housing Balance (External Factors)

Opportunities to improve the jobs-housing balance of the region include programs that encourage transportation improvements and smart growth development. SACOG's MTP, which will provide $22 billion in funding for the next 21 years to develop regional projects that facilitate jobs-housing access, is a significant move in this direction.

Projects that emerge from SACOG's Community Design Program, which provides funding for regional projects that promote mixed-use development, redevelopment, multi-modal transportation options and housing diversity, also work to improve the jobs-housing balance. Obstacles to implementing strategies that would mitigate the jobs-housing imbalance include land-use constraints, community resistance, fiscal shortfalls, environmental conditions, and limitations to what the available funding can be used to support. SACOG has worked to overcome each of the following during the Blueprint process:

- Local General Plans often outline land-use policies that specifically protect open space and agricultural land – in a manner that sometimes frustrates the effort to achieve higher density development.
- In some places, community resistance stands to threaten smart growth planning. This opposition is often characterized as the NIMBY syndrome, which afflicts residents who support the outcome of such redevelopment but who reject the means by which it must be accomplished on a project-by-project basis.
- Often, the biggest obstacle is a funding shortfall. The region is currently facing two critical funding squeezes, the first on transit operations in Sacramento County and the second on road maintenance in the remaining five counties.
- Conditional funding also presents an obstacle to improving the jobs-housing balance; Federal statutes (like the Transportation Equity Act for the 21st Century, or TEA - 21) require urban transportation plans to be financially constrained, limiting proposed improvements to revenues "reasonably expected to be available."
- Clearing environmental hurdles also causes delay. [102]

[102] Sacramento Council of Governments, *Final Interim Metropolitan Transportation Plan*, October 24, 2004, Pg. 13–15.

Findings

The distinct and growing gap between job centers and housing centers has aggravated the inadequacies of the region's radial transportation system. It is difficult to travel between these hubs and the large number of people now doing so has triggered considerable congestion. Sacramento County (in particular, the City of Sacramento and Rancho Cordova) and selected surrounding jurisdictions (West Sacramento, Loomis, Live Oak, Roseville), on average, far exceed the region's ideal jobs-housing ratio of 1.2. Other housing-rich jurisdictions, such as Galt, Citrus Heights, Elk Grove and Rocklin, fall short of a 1.0 ratio. Looking forward to 2025, the State forecasts the region's population to reach 2.8 million, a 49 percent increase. With that would come a 54 percent increase in travel (unless land development proceeds differently than it has in the past), meaning that even if transit use could be increased tenfold and bicycle/walk trips tripled, the region still faces a 40 percent increase in travel by auto. [103]

Jobs-Housing Relationships

By 2050, the Sacramento region will grow by more than 1.7 million more people (bringing the total to 3.7 million), 1 million new jobs, and 840,000 more homes. Overall, the region currently averages 1.13 jobs per housing unit, a ratio that ranges from 0.55 in Citrus Heights to 1.85 in Roseville, hitting 5.33 in downtown Sacramento. The Base Case Scenario shows this trend getting worse (see the table on page 89), as most of these areas either do not improve or instead they increase, even after taking into account significant housing growth. Thirty-two percent of the employment growth in the region will occur in the U.S. Hwy 50 corridor connecting West Sacramento and downtown Sacramento with Rancho Cordova and Folsom. A second district that appears to be a job center now and in the future is south Placer County, particularly Roseville (1.64) and Rocklin (1.19). Both communities will have strong housing growth in the next 25 years, but even stronger employment growth. In 2025, Roseville's jobs-housing ratio is expected to increase from 1.64 to 2.26, and Rocklin will increase from 1.19 to 1.43. Thirty-four percent of the employment growth in the region will occur in this area. Both of these employment centers– the U.S. Hwy 50 corridor and south Placer County – will draw commuters from throughout the region. [104]

Alternative Projected Growth Outcomes

Scenario A, as shown in the table, reflects a projection of current land-use patterns to 2050. Scenarios B, C and D represent alternatives to this plan developed from input received at the regional meetings where over 5,000 local residents participated.

[103] Sacramento Council of Governments, *Sacramento Blueprint: Transportation/Land Use Study*, *Final Report*, June 30, 2004, Pg. 3.
[104] Ibid, Pg. 9.

Regional Growth Statistics[105]
Comparison of Jobs to Housing Units Ratio by Scenarios

Placer:

General geographic Location of Node	Existing Conditions	Scenario A Base Case	Scenario B	Scenario C	Scenario D
Lincoln	1.15	3.64	0.99	0.89	1.11
Loomis	2.98	1.40	0.64	0.69	0.74
Rocklin	0.79	1.45	3.55	2.72	2.31
Roseville	1.85	13.32	3.11	3.14	3.21
Colfax	1.15	0.40	3.95	1.49	4.00
Auburn	2.08	0.82	2.97	1.99	2.23
SW Placer Co. Unincorporated	1.07	5.57	0.46	0.48	0.27
Balance of Unincorporated Co.	0.67	6.43	0.33	0.47	0.13
	1.28	1.58	1.54	1.47	1.57

Sacramento:

General geographic location of Node	Existing Conditions	Scenario A ("Base Case")	Scenario B	Scenario C	Scenario D
City of Sacramento (1)	1.46	7.00	1.27	1.12	1.05
City of Sacramento (2)	3.51	38.77	1.99	1.73	1.74
City of Sacramento (3)	1.04	2.09	1.18	1.20	1.58
Delta (4)	1.87	0.00	0.00	0.00	0.00
Elk Grove (5)	0.63	1.18	1.28	1.24	1.34
South County (6)	1.89	0.26	0.45	0.38	9.68
East County (w/in USB) (7)	1.53	0.99	1.24	1.23	0.95
Rancho Cordova (8)	2.04	1.03	0.81	0.89	1.19
A-/Carm/FO/Orangevale (9)	1.09	1.56	1.32	1.64	0.93
East/Southeast County (10)	2.62	0.33	0.35	0.40	0.51
Folsom (City+ SOI) (11)	1.50	1.98	2.18	1.90	1.28
Citrus Heights (12)	0.55	1.74	1.12	1.12	1.15
Rio inda/McClellan (13)	1.28	1.06	1.43	1.23	2.37
N Natomas Joint Vision Area	N/A	0.42	0.28	0.46	0.31
Galt (15)	0.28	0.66	0.86	0.75	0.96
Sac Int'lAirport/Metro Airpark	22.08	4.44	3800.60	34.68	31.87
	1.43	1.17	1.21	1.15	1.21

[105] Sacramento Council of Governments, *Final Interim Metropolitan Transportation Plan*, October 24, 2004, Pg. 10.

(continued)

Sutter:

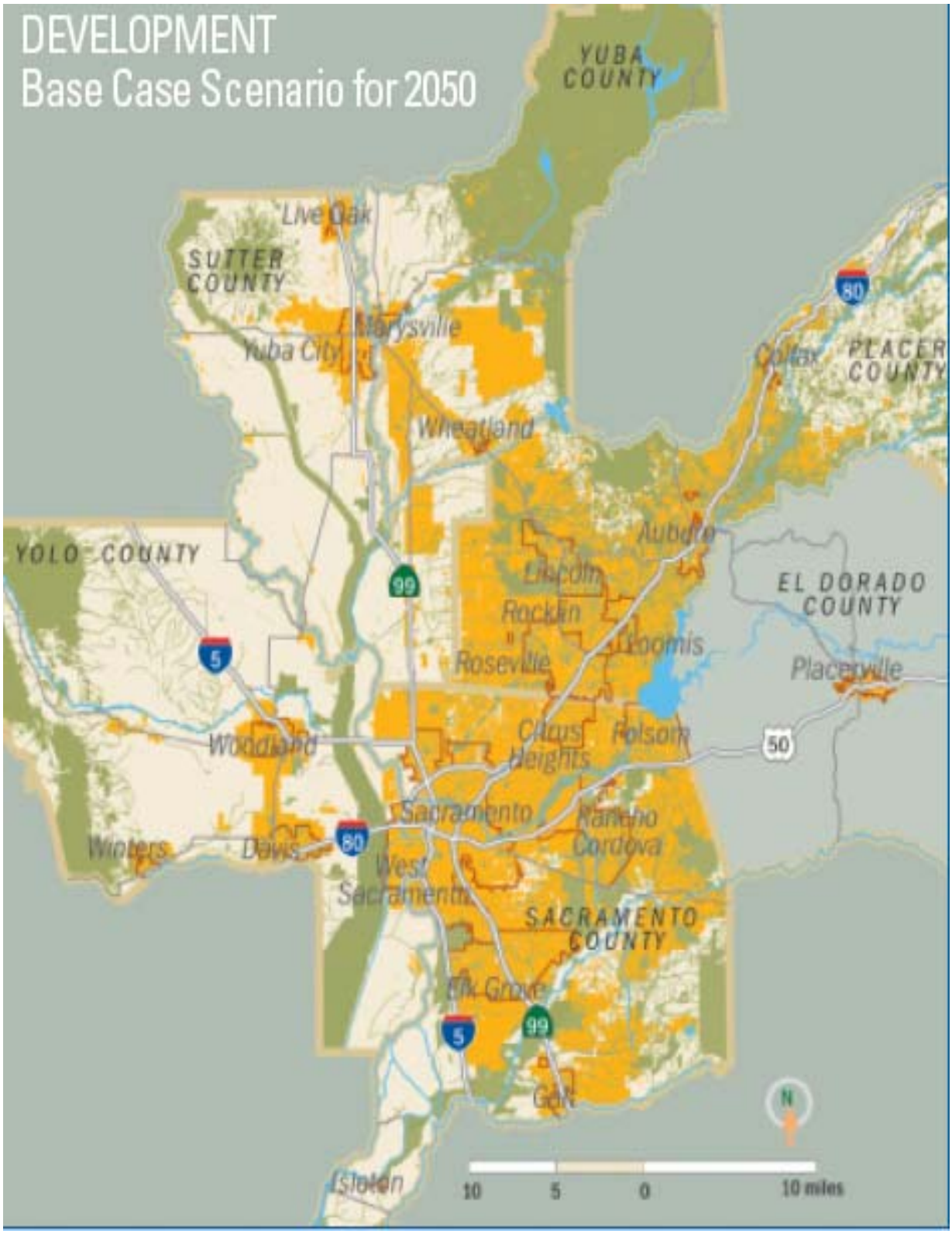
General geographic location of Node	Existing Conditions	Scenario A ("Base Case")	Scenario B	Scenario C	Scenario D
Live Oak	1.97	0.98	0.60	1.07	0.99
South Sutter	N/A	282.40	N/A	2.77	N/A
Unincorporated	0.54	0.74	0.41	-48.60	0.29
Yuba City	1.14	0.60	1.24	1.30	1.03
	1.01	0.74	1.31	1.56	0.99

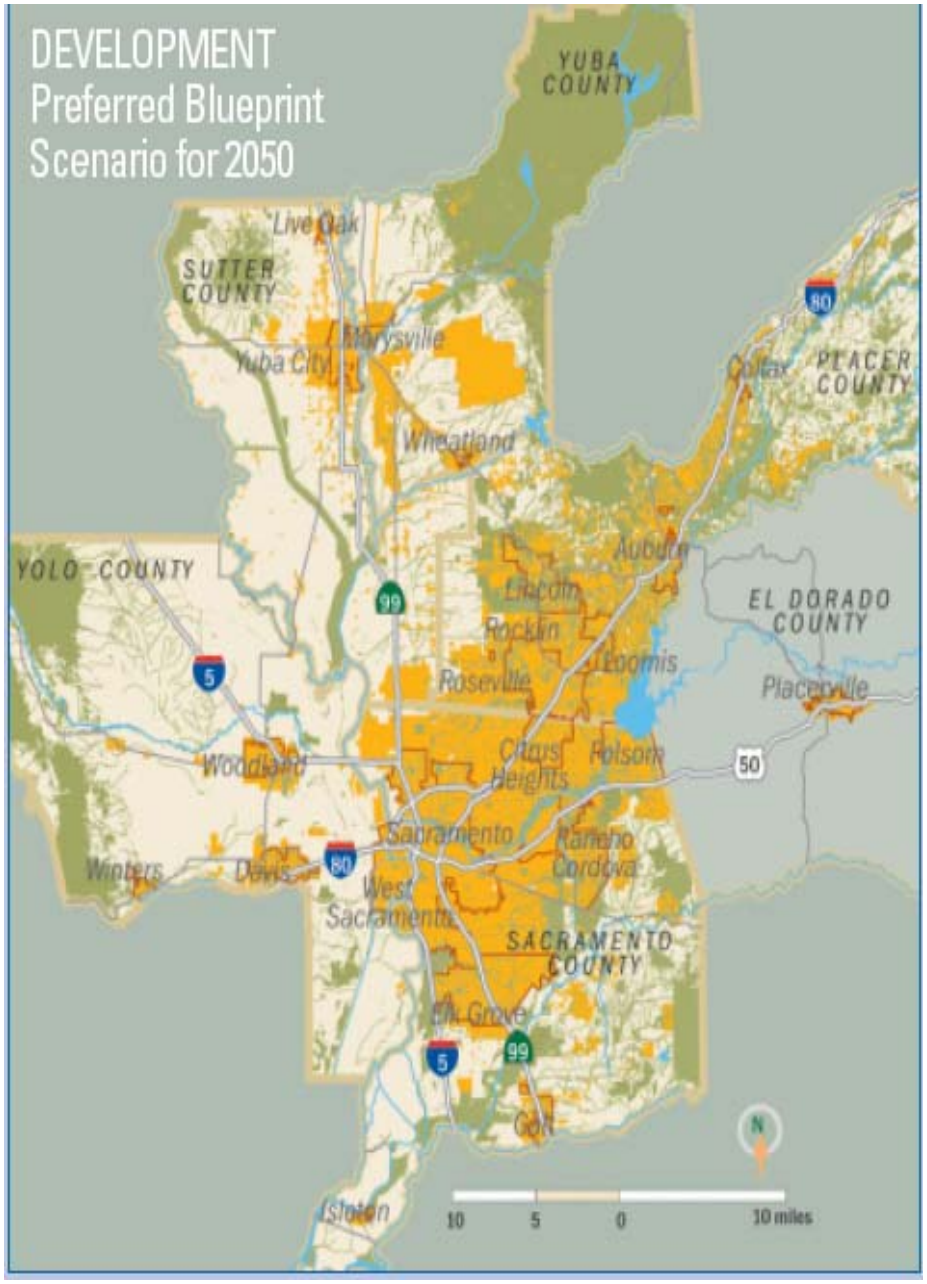
Yolo

General geographic location of Node	Existing Conditions	Scenario A ("Base Case")	Scenario B	Scenario C	Scenario D
Davis	1.38	1.33	1.17	1.26	1.18
New City	N/A	N/A	1.28	N/A	N/A
University	7.42	15.85	1.75	1.92	2.96
West Sacramento	2.05	1.96	1.16	1.27	1.24
Winters	2.21	0.86	1.04	0.98	0.98
Woodland	1.55	1.00	1.05	1.29	1.08
Yolo Unincorporated	0.72	0.43	1.38	1.34	1.54
	1.73	1.39	1.18	1.28	1.24

Yuba:

General geographic location of Node	Existing Conditions	Scenario A ("Base Case")	Scenario B	Scenario C	Scenario D
Marysville	1.94	0.01	0.17	0.16	-0.99
Plumas Lakes	2.23	0.80	1.09	0.64	0.50
Unincorporated	0.61	1.30	1.65	3.45	2.42
Wheatland	1.32	0.15	0.91	1.35	0.90
	0.98	0.78	1.12	1.26	1.16


DEVELOPMENT
Base Case Scenario for 2050
YUBA COUNTY
Live Oak
SUTTER COUNTY
Marysville
Yuba City
Wheatland
Auburn
PLACER COUNTY
YOLO COUNTY
Lincoln
Rocklin
Roseville
Loomis
EL DORADO COUNTY
Placerville
Woodland
Citrus Heights
Folsom
Sacramento
Rancho Cordova
Winters
Davis
West Sacramento
SACRAMENTO COUNTY
Elk Grove
Galt
Isleton
80
99
5
50
N
10
5
0
10 miles



106

[106] Sacramento Council of Governments, *Sacramento Blueprint: Transportation/land Use Study*, *Special Report*, January 2005.

Public Participation

Public input was vital to the Blueprint Project. The Blueprint Project involved the public with transportation and land-use planning to an unprecedented extent, inviting community members to participate in a process previously dominated by planners and elected officials. Public input is directly responsible for developing the vision of regional growth reflected in the three alternative scenarios. Approximately 5,000 members of the six-county region participated in the project through local, county and regional meetings over a two-year period.

SACOG partnered with Valley Vision, a nonprofit community organization dedicated to addressing regional growth issues, to encourage civic engagement in the Blueprint process. As a neutral convener, Valley Vision recruited community members to participate in local meetings and facilitated the public input process that guided development of the three alternative scenarios. Valley Vision represents leaders in the Sacramento-area business, education, agriculture, industry and environmental circles.

Assisted by PLACE3S technology and community-tailored presentations by SACOG staff, representatives from each of the region's counties and 22 cities and the public who attended these community meetings were able to engineer a customized land-use model that best accommodated their mutual interests.

Blueprint workshops gave residents the chance to become planners through a software program called PLACE3S. The software speeds up the calendar by 50 years to show almost immediately how decisions made today will affect the region in the future. PLACE3S enables users to apply a variety of zoning designations to potential development areas. Each designation includes characteristics such as the number of dwellings per acre, how many employees commercial areas can handle, and even the number of parking spaces the land will support. PLACE3S demonstrates how different growth scenarios affect quality-of-life issues such as traffic congestion, air pollution, recreational opportunities, open space and more. Workshop participants were organized into a mix of interest representatives working in small groups, thus learning other perspectives in addition to their own. Members of the public who attended the workshops helped decide what they would like to see the region become - not just for themselves, but for their children, grandchildren and newcomers. The final scenarios were developed in collaboration with SACOG staff and local planners as a result of public input to accomplish these land-use strategy recommendations.

In addition to Valley Vision, SACOG partnered with other public agencies and private businesses for financial support and community outreach assistance, including: the Department, California Energy Commission, California State Treasurer's Office, Sacramento Municipal Utility District, Sacramento Metro Chamber of Commerce, Urban Land Institute – Sacramento Council, and the Environmental Council of Sacramento. In addition to hosting 38 public involvement workshops, Blueprint Project staff held more than 150 special presentations to ensure the participation of groups who are traditionally under-represented in transportation and land-use planning processes.

At the regional workshops, translators were used to conduct the exercises and interpret the event for Spanish- and Vietnamese-speaking participants. At each workshop, surveys were distributed, collected, and analyzed to give each participant a voice in the process.

SACOG also maintains a website dedicated to the project (www.sacregionblueprint.org). On the website interested parties were invited to register for workshops, view workshop results, view media coverage, and post comments and questions to a message board. SACOG published eleven advertisements; several four-page news inserts in local papers, and conducted a six-week television and radio advertising campaign. Because of strategic partnerships with local social equity groups including La Familia, the Gray Panthers, Resources for Independent Living, Burress & Associates and Asian Resources, more than 50,000 flyers in multiple languages were printed and distributed to promote all levels of the workshops. The workshops received extensive coverage in the mainstream and alternative press.[107]

IRP Strategies

Long-Term

All three of the Blueprint Project's alternatives to the Base Case Scenarios offer a smart growth replacement for the region's current low-density development model. Scenario B, which offers more housing choices, a mix of land uses, and uses reinvestment, steers most of the region's growth to its "edge" cities. Scenario C, which offered slightly higher housing densities and re-investment than B, focused its growth on the inner "ring" of cities situated around downtown Sacramento. Scenario D, which offered the highest housing densities and re-investment levels, would accommodate a high proportion of growth downtown. All three strategies would improve the jobs-housing mismatch.

In addition to adopting a hybrid of these smart growth strategies as its "preferred alternative", SACOG is using regional transportation funding ($500 million in the long term and $12 million over the next two years) to subsidize projects that emerge from Blueprint and other planning processes and have good community outcomes, but are not fully supported by the market. These projects promote the use of smart growth land-use principles that lead to shorter commutes, less driving and more walking, biking, transit use, and neighborhood electric vehicles.[108]

[107] Sacramento Council of Governments, *Sacramento Blueprint: Transportation/Lland Use Study, Final Report*, June 30, 2004, Pg. 21-22.
[108] Ibid, Pg. 16.

Evaluation of Strategies

During the workshops, the Blueprint Project instantaneously showed workshop participants the impacts of planned growth on transportation, jobs-housing balance, water consumption, air pollution, public subsidy, and cost efficiency. Knowing up front the impact on these factors helped participants make more informed decisions on land-use and transportation planning. As SACOG continues on the last leg of the project, PLACE3S will be used to inform decision makers of the effects on additional local resources such as infrastructure cost, water supply, and local tax income and expenditures. For each combination of land-use and transportation growth, decision makers will be able to compare the relative costs of infrastructure, the demand for water and the difficulty of supplying it, and the cost of providing public services relative to tax receipts. [109]

Final Internal Assessment of Outcomes – Conclusions

The SACOG Board of Directors met in October 2004 and reviewed a draft preferred alternative. After additional stakeholder input, via a questionnaire in newspaper inserts, internet voting and a detailed public opinion poll, a draft preferred alternative was discussed at a regional summit of elected officials. A final vote on the Board's preferred scenario and principles was conducted in December 2004 where a new scenario which incorporated elements of Scenario C and Scenario D was selected. This hybrid combed option will be used by SACOG during the next update of the RTP.

SACOG staff plans to continue to work with local jurisdictions to recommend strategies they can adopt to correspond with the Blueprint's vision. They will continue to offer technical and data support to these jurisdictions as they update their general and specific plans. [110] SACOG anticipates local governments will modify their general plans to conform to the Blueprint's preferred alternative.

Based on the backing of local officials, widespread community support from a cross section of the population, and enthusiasm for initiating smart growth projects as indicated by the popularity of the Community Design Program, SACOG believes the Blueprint will successfully guide growth in the Sacramento region toward a higher-density, mixed-use model. Even if local governments reject the plan, or embrace only parts of it, the Blueprint has already succeeded in engaging hundreds of Sacramento-area residents in crafting their own land-use models and has encouraged them to question the existing urban footprint. Extensive media coverage of the project within the region educated the public and focused attention on growth and development issues critical to the region's future.

[109] Sacramento Council of Governments, *Sacramento Blueprint: Transportation/Lland Use Study, Final Report*, June 30, 2004, Pg. 23.
[110] Ibid, Pg. 24.

The Blueprint revealed that continuing to grow using current land-use patterns will result in conditions symptomatic of a "Scenario A:" growing congestion, a severe jobs-housing mismatch, longer commutes (spatial and temporal) and environmental damage that can be improved upon with alternative development patterns.[111] The project demonstrated that changes to local land-use patterns could yield significant benefits to their region's transportation system and air quality.

Final Note

The voters of County of Sacramento, one of the areas study in this IRP, voted in the November 2004 elections on a county wide transportation initiative, Measure A. Measure A levies a half-cent sales tax over the next 30 years to improve transportation projects in Sacramento County. Specifically, funds will be directed to relieve traffic congestion, improve safety, and match State/federal funds by: Improving I-5, I-80, US 50, SR-99; Constructing a new road connecting I-5/SR-99/US 50; Maintaining/improving local roads; Increasing transit for seniors and disabled per son; Expanding/planning for light rail and commuter rail. The measure passed with more than 75 percent of the County's electorate voting for passage of Measure A.

[111] Sacramento Council of Governments, *Sacramento Blueprint: Transportation/Lland Use Study, Final Report*, June 30, 2004, Pg. 25.

SAN DIEGO ASSOCIATION OF GOVERNMENTS (SANDAG) IRP[112]

Project Description

Each workday morning, San Diego's regional traffic reporters broadcast a now-familiar message, "it's bumper to bumper on southbound Interstate 15 (I-15) from Escondido through Mira Mesa." From southwestern Riverside County to central San Diego, this major freeway artery is routinely paralyzed with traffic congestion as I-15 commuters make increasingly longer drives between home and work. Traffic congestion on I-15 is only a symptom of a larger condition: the flight of thousands of families from the San Diego region to southwestern Riverside County in search of more affordable, suburban, single-family homes. The result is an increasing separation of jobs and housing in both counties.

To address both the causes and impacts of this growing jobs-housing imbalance, the SANDAG and WRCOG joined forces with the SCAG, Cal-Trans and others to form the I-15 IRP. Funded, in part, by a grant from the Department, the IRP conducted research and created strategies to reduce both the demand for, and impacts of interregional commuting along the I-15 corridor.

The counties involved were San Diego and Riverside, with focus being directed to the western part of Riverside County. The major issues that were reviewed are increased traffic on I-15 and the increasing commute times for Temecula/Murrieta commuters of Riverside County. Based on the growth forecasts in the two-region area, traffic on the existing eight-lane freeway will surpass its capacity sometime between 2015 and 2030, reaching LOS F. While Riverside County has local funding to expand the freeway to 12 lanes, SANDAG does not identify funding in its local transportation measure (TransNet) to expand Interstate15 (I-15) north of SR-78. More critical facilities in the San Diego highway system are identified for TransNet funding, including expansion of I-15 south of SR-78 in Escondido.[113]

Centered on Interstate 15, this two-county commute corridor extends from central San Diego to the Riverside County cities of Lake Elsinore, Perris and Hemet. While employment areas in the central and northern areas of the City of San Diego are included in this report, the residential study area is centered along I-15 within 30 miles of the County boundary—from Lake Elsinore and Perris on the north to Escondido on the south. In this report, the larger commute area is referred to as the Study Corridor, and the smaller residential focus area as the Study Area. Because of topography and distance, Riverside and San Diego counties have defined their communities as being located in separate regions. With increased interregional commuting, however, the definition of the two regions has blurred.

[112] *www.abag.ca.gov/planning/interregional/stateirp/15.htm*
[113] San Diego Council of Governments, *I-15 Interregional Partnership, Final Report*, June 30, 2004, Pg. 13.

Study Area Counties: Riverside (Western), San Diego, including 42 cities

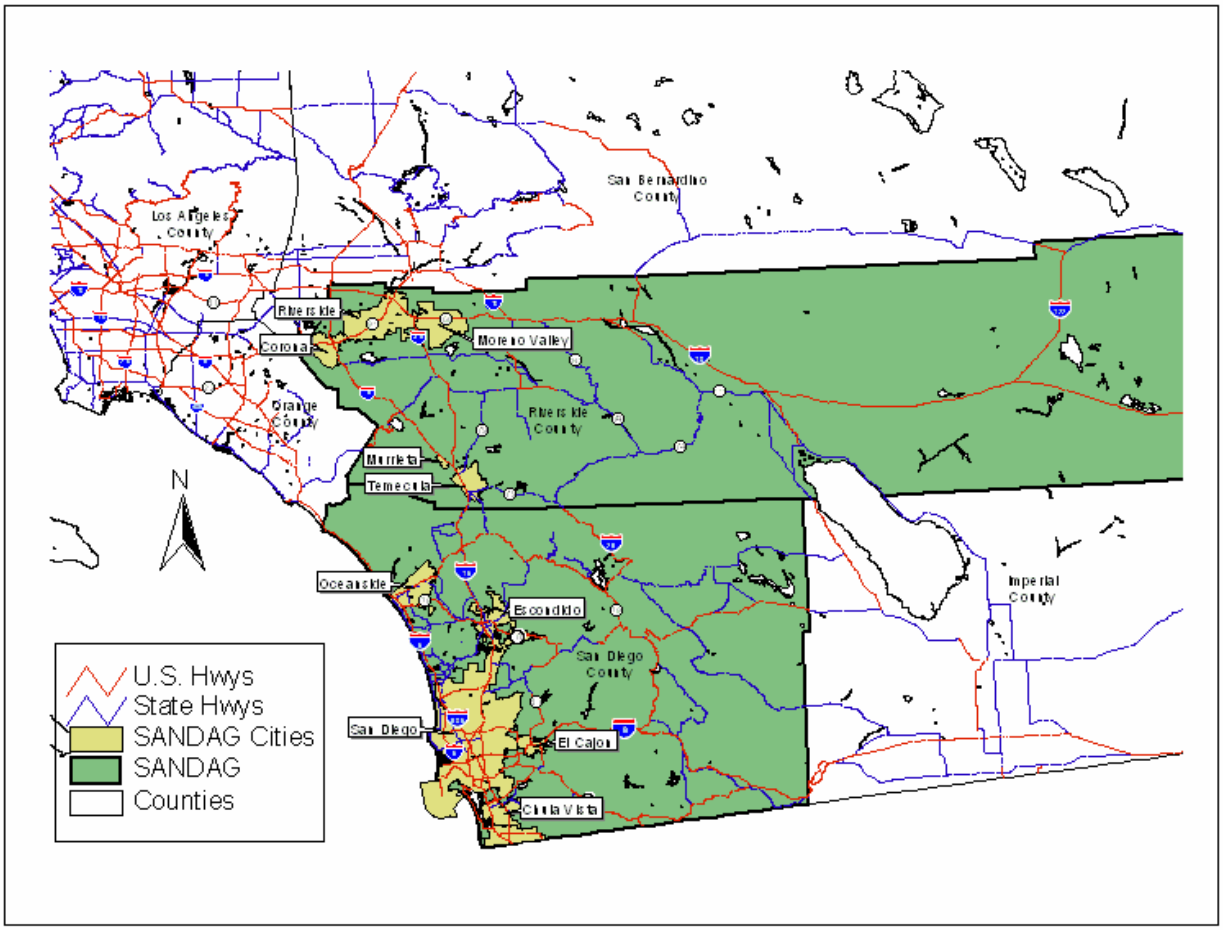
Total Population 2004: 4,793,947

Total Households 2004: 1,615,176

Square Miles: 11,407

Major Highways: US Hwy 15, US Hwy 215, Interstate 5

SANDAG IRP Study Area



Overview

The primary goal of the I-15 IRP is to foster a more sustainable land-use pattern providing appropriate employment closer to where people live in the study area and more affordable housing closer to employment in jobs-rich areas throughout the study corridor. By doing so, workers would have more opportunities to live closer to work, reducing the need for long distance interregional commuting. The I-15 IRP also has developed strategies that mitigate the impacts of the jobs-housing imbalance on congestion along the I-15 corridor.[114]

Defining Jobs-Housing Balance

Jobs-housing balance is a condition that results in an adequate supply of housing (and, therefore, workers) being located within a reasonable commute distance of compatible employment opportunities. The benefits of jobs-housing balance include lower demands on the highway system, maintenance of air quality, and shorter time spent commuting to and from work than would exist with greater jobs- housing imbalance.

Jobs-housing balance compares the available housing and available jobs within a community, a freestanding city or other geographically defined sub-region. In addition, jobs-housing balance also should consider the cost and types of available housing, comparing them to the wage rates and types of jobs that are located in a community. For the purpose of this project jobs-housing balance is reflected by three measures:

- Jobs-Worker and Jobs-Household ratios
- Housing Affordability Index (percent of resident households or workers that can afford a median-cost home)
- Commute Trip (Home-to-Work) Time

Existing Conditions

1. Greater housing availability and lower housing prices in southwestern Riverside County compared to the San Diego region are key factors in the growth of interregional commuting.

Residential development in the San Diego region has not kept pace with demand. In the decade leading up to 2000, jobs in the San Diego region grew by 23 percent. During the same period, the number of housing units increased by less than 10 percent. During August 2002, in southWestern Riverside County, where the majority of I-15 interregional commuters reside, the median price for new and existing homes was $250,000, up 21 percent from the same month in 2001. In August 2002 the median sale price in the San Diego region was $339,000, having increased 24 percent from August 2001. A major reason for this price differential is that land costs in Riverside County are substantially less than those in the San Diego region.

[114] San Diego Council of Governments, *I-15 Interregional Partnership, Final Report*, June 30, 2004, Pg. 33.

In 2000 there were approximately 151,000 homes in southwestern Riverside County. WRCOG estimates that approximately 140,000 homes are currently in the pipeline to be built over the next few years in the same area. Housing availability is projected not be a deterrent to those choosing to look in southwestern Riverside County for a home.

2. The ability to own a single-family detached home is very important to I-15 interregional commuters.

Approximately 90 percent of interregional commuters in the study area live in a single-family detached home and 80 percent own their home. This compares to 52 percent of households living in single-family detached homes, and 55 percent of households that are homeowners in the San Diego region.

Survey results show that just over 90 percent would prefer owning a single-family detached home compared to an attached home such as a town home or condominium. This percentage decreases only slightly when a price differential is introduced, or even when the town home is said to be 30 minutes closer to work with a commute of only 15 minutes. While the strong desire to own a single-family detached home is not unique to I-15 interregional commuters, it is a defining characteristic.

However, based on a recent survey of San Diego County residents, a fairly even split (48 percent versus 42 percent) occurs between those who think development should occur in a dispersed single-family detached style of development versus a more compact style of development that includes town homes, condominiums and apartments mixed in with shops and office space. This would indicate that a broader range of housing types is needed to serve the needs of all San Diego residents.

3. There are a growing number of interregional commuters, most of whom have moved from the San Diego region.

It is estimated that 29,000 residents of southwestern Riverside County commute into the San Diego region. This is nearly a 400 percent increase over the twelve year period since the 1990 census. Approximately half have been doing so for less than five years. Of those living in southwestern Riverside County less than 10 years, 60 percent moved there from the San Diego region. About 20 percent are public employees, about one third of these are in the military.

4. I-15 interregional commuters are concentrated in the Temecula/Murrieta area and are traveling to employment destinations throughout the San Diego region.

Approximately 60 percent of the estimated 29,000 interregional commuters on I-15 live in the cities of Temecula or Murrieta or the adjacent unincorporated area. Stated differently, one household in three in the Temecula/Murrieta area has at least one person commuting on I-15 into the San Diego region.

Over 40 percent of all I-15 interregional commuters travel to jobs in northern San Diego County, including Camp Pendleton, Carlsbad and Escondido. Other key employment destinations for interregional commuters include Sorrento Valley, Rancho Bernardo, Kearney Mesa and downtown San Diego. On average, interregional commuters travel 52 miles to work, spending 60 minutes going to work and 72 minutes returning home from work.

5. I-15 interregional commuters are very satisfied living in southwestern Riverside County.

Residents who are 1-15 interregional commuters experience a very high level of satisfaction with living in southwestern Riverside County, expressing an even higher level of satisfaction than did residents who do not have to make the long commute. When comparing the two regions, twice as many I-15 interregional commuters felt southwestern Riverside County is a better place to live than San Diego County than the reverse. When asked in a focus group setting, a number of southwestern Riverside residents indicated that "small town feel" and "slower pace" were two key reasons they liked living there over neighboring counties.

Sixty three percent had some interest in moving closer to work in San Diego County in the unlikely event they could get the same house for the same cost. The percentage with interest in moving closer to work dramatically goes down when the tradeoffs they likely would have to make in terms of housing type and housing cost are introduced.

Interregional commuters appear to be somewhat more interested in changing jobs to work closer to where they live. Seventy percent would be interested in changing jobs to work locally if their pay was the same. Almost one-third would be interested in working locally even with a ten percent cut in pay.

6. A high percentage of interregional commuters drive alone.

Currently approximately 85 percent of I-15 interregional commuters regularly drive alone to work and 13 percent carpool. This compares to 76 percent and 12 percent for residents of the San Diego region.

Survey results indicated a general interest in carpooling and vanpooling among interregional commuters. Just under half stated they would be more likely to use carpool and vanpool services if a carpool lane was extended the length of I-15 within the San Diego region. At this time, private bus service is provided between Temecula and San Diego employment centers during peak periods. Also, Riverside Transit Agency (RTA) initiated commuter bus service from the Temecula/Murrieta area to the Oceanside Transit Center near employment destinations in northern San Diego County in early 2003.

About 20 percent of I-15 interregional commuters indicated that they are allowed to telecommute at least once per week. An equal percentage said their employer sponsors carpools and vanpools, with just under half (47 percent) stating they have some degree of flex-time.

7. I-15 peak period traffic congestion is severe south of SR-78.

Traffic on I-15 is reasonably free flow between the junction of I-15 and I-215 in the City of Murrieta (Riverside County) and the junction I-15 and SR-78 in the City of Escondido (San Diego County). Congestion is off and on from just south of SR-78 down to Interstate 8 in the City of San Diego. Traffic is at LOS F (traffic volume exceeds capacity) at various points along this stretch of I-15 during peak periods.

While the freeway itself is not congested in the Temecula/Murrieta area, freeway access is backed up during peak periods. To address these backups, several interchange projects in Temecula and Murrieta are funded. In addition, the evaluation of freeway interchange operations and potential improvements is ongoing along the I-15 corridor in the county line area, and are projected to be addressed by the coordination recently initiated by Cal-Trans District 8 and 11.

SANDAG travel forecasts project worsening conditions north of Escondido, particularly in the northbound direction. LOS F is shown in both directions south of the county line. In southwestern Riverside County, forecasts show traffic volumes increasing 90 percent along I-15 in the Temecula/Murrieta area and by 130 percent on I-215 just north of the junction with I-15. This increase in traffic is a reflection of the increase in population forecasted between 2000 and 2020 in the Temecula/Murrieta area.

8. Comparison of I-15 interregional commuters to their non-long distance commuting neighbors.

To understand why some residents are willing to commute long distances to work, it is helpful to identify how those commuters differ from their neighbors in southwestern Riverside County. In comparison to other residents, I-15 interregional commuters:

- Are more likely to be employed in hi-tech/computers/internet industries;
- Are more likely to be employed in occupations that require training and education, such as 'manager/administrator/executive' and 'technical specialty/technician';
- Earn more annual income, as a group, from their jobs; and
- Have been at their jobs longer (greater job stability).[115]

Methodology

- A telephone survey of 2,010 adults residing in southwestern Riverside County was conducted during July and August of 2002. This information, along with pertinent land-use, transportation and economic data, was used to develop and evaluate strategies to bring housing and jobs into better balance in both regions. Data from this survey was also used to evaluate a similar, but much more congested commute, from southwestern Riverside County into Orange and Los Angeles counties along SR-91 in a separately funded IRP effort.

[115] San Diego Council of Governments, *I-15 Interregional Partnership, Final Report*, June 30, 2004, Pg. 12.

- Data from this survey was used to establish the boundaries for the study area and the study corridor. From the survey it was calculated that 95 percent of the persons commuting into the San Diego region were from the southwestern Riverside County area (from Lake Elsinore and Hemet south to the county line along I-15).
- Survey information is projected to be supplemented with information from the special CTPP that is projected to be available later in 2004. The CTPP will provide more detailed information about the long-distance commute from southwestern Riverside County communities into employment centers in the San Diego region.
- In addition to the telephone survey, the IRP drew information about the two regions and the travel between them from various existing data sources. Census information was used for information about the residents, households, and employment within the corridor as shown in the table on page 204.[116] Metropolitan area databases for southern California and San Diego were used to determine more detailed population and employment estimates.
- The demographic database contains data sets and links to data sets on population, housing, jobs, etc. for the San Diego and Riverside County regions, as well as adjacent counties and the state as a whole. The data sets originate mostly from the US Census 1990 and 2000 data, as well as population estimates from SANDAG and WRCOG.

[116] San Diego Council of Governments, *I-15 Interregional Partnership Final Report*, June 30, 2004, Pg. 22.

JOBS PER HOUSEHOLD Year 2000

Area	Jobs	Households	Jobs/HH
SOUTHWEST RIVERSIDE COUNTY			
Southwest Riverside County	111,329	151,601	0.73
Temecula/Murrieta area	32,653	42,100	0.78
City of Murrieta	7,986	14,321	0.56
City of Temecula	20,823	18,367	1.13
Unincorporated	3,844	9,412	0.41
Elsinore Area	15,337	26,003	0.59
Sun City/Menifee	7,784	16,226	0.48
Mead Valley	13,547	14,430	0.94
Harvest Valley/Winchester	4,217	4,473	0.94
Lakeview/Nueno	3,528	2,776	1.27
San Jacinto Valley	34,263	45,593	0.75
NORTH SAN DIEGO COUNTY			
Northern San Diego I-15 Corridor	128,837	126,341	1.02
SAN DIEGO COUNTY			
Fallbrook (SRA* 55)	10,491	15,131	0.69
Rainbow (SRA* 54)	944	2,094	0.45
Pala/Valley Center (SRA* 53)	3,593	6,705	0.54
Vista (SRA* 52)	22,943	30,594	0.75
San Marcos (SRA* 51)	39,432	23,903	1.65
Escondido (SRA* 50)	51,434	47,914	1.07
COMPARISON AREAS			
California	14,896,600	11,502,870	1.30
SCAG & SANDAG REGIONS	8,036,400	6,381,168	1.26
Riverside/San Diego/Orange	3,068,200	2,436,182	1.26
Riverside/San Diego	1,671,700	1,500,895	1.11
Riverside County	466,500	506,218	0.92
Western Riverside COG Area	374,139	386,842	0.97
San Diego County	1,205,200	994,677	1.21
Imperial County	50,400	31,870	1.28

Source: U.S. Census Bureau, 2000 Census*SRA = Sub regional Area

IRP Strategies

Role of Public, of participating Jurisdictions, of Local Resources

Public input on the interregional issues and strategies has been solicited since the beginning of the study. In the initial data collection phase, two focus group interviews were used to lead into an 800-sample home interview survey. The focus groups and survey identified existing commute patterns and behavior, as well as opinions on the long-distance commute. As the study progressed, staff made presentations about the study to groups including the Escondido Rotary Club, the Temecula Valley Rotary Club, and San Diego North Economic Development Council among others.

In March 2004, the IRP Policy Committee accepted a draft of this report for distribution and directed that it be presented to a wide range of public interest groups and agencies prior to final action in June 2004. The interregional commute issue and the recommended strategies were presented to the following groups for their information and input. City Councils of Del Mar, Escondido, Hemet, Temecula, Lake Elsinore, La Mesa, Murrieta, Perris, San Jacinto, San Marcos, Vista and Board of Supervisors of Riverside County and San Diego County. Other entities included, North San Diego County City Managers Group, Regional (San Diego) Transit Managers Committee, Riverside County Transportation Commission (RCTC), Riverside Transit Agency (RTA), SANDAG – Transportation Committee, WRCOG - Executive Committee, San Diego Chamber of Commerce (Transportation Committee), San Diego Chamber of Commerce (Housing Committee), San Diego North Economic Development Council, San Diego Regional Economic Development Council, San Diego Regional Housing Task Force, and Southwest Riverside Economic Development Council Group.

Short-Range Program Strategies: Two interregional program strategies were proposed by the I-15 IRP Technical Working Group to support the implementation of the economic development, housing and transportation strategies developed to address jobs-housing balance issues in the San Diego and southwestern Riverside regions. These two strategies address the need to support and/or sponsor legislation that provides incentives for jobs-housing balance programs, and to actively engage in community outreach activities. The IRP Program strategies include:

Strategy P1 - Support/Sponsor Legislation that Addresses Jobs-Housing Balance: This strategy involves advocating for and supporting legislation that provides incentives for jobs-housing balance programs. Additionally, the I-15 IRP could chose to sponsor program specific legislation.

Strategy P2 - Engage Actively in Community Outreach: This strategy involves using existing presentations, informational handouts and reports, and IRP members to promote awareness of the I-15 IRP and its programs to improve the jobs-housing balance in the area. The Partnership would create an outreach toolkit that could be used by SANDAG staff, WRCOG staff, and members of the Technical Working Group to better inform the media and local citizens about the efforts of the IRP.

Short-Range Economic Development Strategy: The I-15 IRP presents opportunities to improve the economy of both the southwestern Riverside and San Diego regions.

Strategy ED1 - Facilitate Greater Collaboration between Regional EDAs: The recommended strategies expand the discussion to include a greater emphasis on the inter-related nature of the economies of both regions.

Strategy ED2 - Improve Job Growth through New Employment Opportunities in the Cluster Industries that Drive the Bi-regional Economies: One way to address the relationship between the two regions is to foster the development of employment clusters. These clusters are not constrained by political boundaries. Firms purchase goods and services from the company that best meets their needs. Proximity is one aspect firms consider when making a business decision; creating a relationship with a company within an hour travel time is preferable to working with a company more than a day of travel away. The common boundary presents our two regions with an opportunity to coordinate efforts to achieve a mutually beneficial outcome.

Enhancing the cluster-related infrastructure of our two county area will improve overall economic performance on both sides of the county line. For example, improving and developing high quality research institutions, a stronger presence of complementary businesses, and appropriate skills and training programs all contribute to a strong regional economy. Furthermore, developing jobs and a local labor force capable of working in them will help the IRP address the jobs-housing imbalance and raise our residents' standard of living.

Short-Long Range Housing Strategy: Strategy H1, which is described as a long-range strategy in this report, also includes a number of short-range actions. Although accomplishing this strategy will take time and requires an ongoing commitment on the part of local jurisdictions and others, a number of actions can be undertaken in the short-term. Basically the intentions of the Long and Short Range Housing Strategies are to ***Increase the supply of Moderate-Cost Housing in San Diego County.***[117]

Strategy H1 - Provide a Range of Housing Affordability and Housing Types in All Communities: California State housing law promotes planning and implementation of balanced communities within the State, which include a balance of housing types and housing costs as well as a balance of housing and employment. In areas with many employment opportunities, the provision of a full range of housing affordable to workers of all income levels, from management to service workers, is especially important.

[117] San Diego Council of Governments, *I-15 Interregional Partnership, Final Report*, June 30, 2004, Pg. 82..

Strategy H2 - Implement Fiscal Reforms to Encourage the Construction of Moderate and Low income Family Housing Near Employment Centers: This Strategy would build on the SANDAG initiative to restructure state and local tax policy to provide an "incentive" for local governments to encourage the development of residential uses within their boundaries. It would support proposals sponsored by the League of California Cities and other organizations (including SANDAG) which promote the creation of this type of incentive. Strategy H2 would reduce the reliance of local jurisdictions on the local-portion of the sales tax to support local services and programs.

Strategy H3 - Provide Incentives for the Construction of Moderate Cost Family Housing Near Employment Centers: The largest group of San Diego workers living in southwestern Riverside County is made up of moderate-income families, which often include children. This group appears to value home ownership, single-family homes and good schools so highly that they are willing to make a significantly longer-than-normal commute to work in order to have them.

Strategy H3 seeks to provide additional new single-family homes in the moderate cost range, generally slightly under $300,000: While many new condominiums are priced in this moderate cost range, very few new single-family homes are available in the San Diego region for less than $300,000. The cost of single-family homes in the San Diego region could be reduced using incentives in the following ways:

- Provide increases in housing density in urbanized areas by implementing the existing State density bonus law. State law allows a 25 percent density bonus if 20 percent of a project is built as moderate-income condominiums.
- Streamline permitting process for mixed-use and residential development in areas near employment centers.
- Implement a Location-Efficient Mortgage program.
- Implement employer-assisted housing programs.
- Develop a subsidy program(s) to assist in both housing rehabilitation and in the development of community infrastructure, especially schools.

Strategy H4 - Require the Construction of Moderate Cost Family Housing Near Employment Centers: As noted in Strategy H3, the largest group of I-15 Interregional commuters is the primary wage earners of moderate-income families, often with children. While H3 attempts to increase moderate cost family housing in the San Diego region using incentives, Strategy H4 would achieve the same objectives through development requirements. Strategy H4 would:

- Reduce the cost of single-family homes by requiring that some portion of housing projects include the construction of smaller, less expensive, starter homes.
- Implement inclusionary housing programs for new residential developments in areas near employment centers aimed at moderate-income households.

- Develop a subsidy program(s) to assist in both housing rehabilitation and in the development of community infrastructure, especially schools. Subsidies should not depend on developer contributions, alone. A subsidy program could be structured as either an incentive or a requirement.

Strategy H5 - Encourage Infill Family Housing in Older Residential Neighborhoods: Older residential neighborhoods, including those built into the early 1980s, are often located near existing and growing major employment centers. These older communities can help provide access to employment in two ways. First, if revitalized, these neighborhoods can continue to provide moderate-cost, single-family housing. In addition, their obsolescent commercial areas may be potential locations for infill development

Short-Range Transportation Strategies: The I-15 IRP Policy Committee approved eight short-range transportation strategies in February 2003.

Strategy T1 - Coordinate Interregional of Vanpool and Carpool Programs: The RCTC is responsible for management of the rideshare program in Riverside County; SANDAG is responsible for this program in the San Diego region. Strategy T1 involves SANDAG and RCTC working together to develop ways to promote and serve interregional commuters more efficiently with the ultimate goal of increasing the number of commuters who carpool, vanpool and buspool.

Strategy T2 - Expand Park-and-Ride Lots and Improve Rideshare Information Signage: This strategy calls for expanding park-and-ride lots along the I-15 corridor to support carpool, vanpool, and public transit services. Developing secure, maintained and well-identified locations are projected to help encourage ridesharing and are projected to serve as collection points for current vanpool and for any future bus service along the corridor.

Strategy T3 – Conduct Joint Outreach and Marketing for Transit, Vanpool and Rideshare Programs: Several agencies are involved in promoting alternative modes of transportation along the I-15 corridor. SANDAG and RCTC provide carpool and vanpool services and the RTA began interregional commuter bus service in 2003.

Strategy T4 - Implement Interregional Public Transit Commuter Services: Interregional transit commuter services are projected to connect residential areas in southwestern Riverside County, where interregional I-15 commuters live, to employment centers in the San Diego region, where a significant percentage of these I-15 commuters work.

Strategy T5 – Foster Collaboration among Transit Providers (public and private): The long-range vision for transit in southwestern Riverside is covered in the SCAG's RTP; the vision for the I-15 corridor in northern San Diego is covered in the SANDAG RTP. Short-range programs have also been adopted by local public transit operators.

Strategies T6, T7, and T8 - Develop Employer Incentive Programs: While public transportation agencies can encourage employers to offer programs and incentives, employers ultimately must initiate, support and promote them. Funding for commuter benefits can be borne entirely by the employer, by the commuter or by a combination the two. These strategies must be adopted and implemented by public- and private-sector employers. The initial goal of the pilot program is to have ten companies participate in the incentive program for a minimum one-year period.

Emphasis on employer outreach should continue through regional rideshare programs, with a focus on the following areas:

- Advocate for Employer-Subsidized Transit Passes (T6)
- Encourage the Adoption of Alternative Work Schedules (T7)
- Encourage Telework (T8)[118]

Long-Range Economic Development Strategies

Both economic development strategies (ED1 and ED2) should be actively pursued. WRCOG and representatives of several economic development agencies (EDAs) from southwestern Riverside County (Strategy ED1) have begun the process of improving inter-agency coordination. In the near future this process is projected to be expanded to incorporate EDAs from the San Diego region.

Long-Range Housing Strategies

The provision of incentives for the construction of moderate cost, family housing (H-3) near employment centers in San Diego County is the only housing strategy recommended for active involvement by the IRP. Incentives could be provided through employers, through office site developers or through local jurisdictions.

Long-Range Transportation Strategies

Three long-range transportation strategies have been identified that should be actively pursued by the IRP – T12 (HOV Facilities), T13 (Coordination of Transportation Planning Efforts), and T14 (Expansion of (Bus Rapid Transit) BRT Commuter Transit Service).

T12 - HOV Facilities: RCTC currently has plans to expand I-15 down to the county line. SANDAG currently lacks the funding needed to pursue I-15 freeway expansion north of Escondido. This strategy recommends HOV facilities on I-15 through southwestern Riverside County down to I-8 in San Diego.

T13 - Coordination of Transportation Planning Efforts: This strategy would involve the participation of Cal-Trans Districts 8 and 11, SCAG, SANDAG, and RCTC in a formal planning process for I-15 at the county line.

[118] San Diego Council of Governments, *I-15 Interregional Partnership, Final Report*, June 30, 2004, Pg. 36.

T14 - Expansion of BRT Commuter Transit Service: Interregional transit service should be expanded to implement BRT Service along the I-15 corridor to provide alternatives to driving alone for people who commute from the southwestern Riverside area to the San Diego region. SANDAG and RCTC need to coordinate their plans for BRT service in this transportation corridor.

Implementation Plan

Eight short-range transportation strategies were approved by the IRP Policy Committee in February 2003. Over the past year, some initial benefits have been realized. These strategies are being carried out by three types of implementing agencies: regional rideshare agencies, transit operators and employers.

Internal Evaluation of Strategies

Coordination of these active programs can improve their effectiveness. For example, both regions subsidize vanpools under different programs at different levels of subsidy. Coordination of existing programs seemed to be a good first step in mitigating the existing long-distance commute. The eight short-range transportation strategies were adopted by the Policy Committee in February 2003 and are being implemented by SANDAG and RCTC.

As the evaluation of strategies continued, three additional strategies were identified for short-range implementation. These strategies included two IRP program actions, currently being implemented through the I-15 IRP activities: a legislative advocacy program for addressing interregional commute and jobs-housing balance issues and an outreach program to inform residents, agencies, and organizations about these issues. [119]

Final Internal Assessment of Outcomes

Interregional commuting issues and the 23 strategies recommended to mitigate interregional commuting were presented to local jurisdictions, EDAs, and transportation committees during an outreach program in April and May, 2004. Three major themes were identified:

- The concept of Smart Growth should be incorporated into the interregional strategies. If future congestion is to be minimized, new development should be designed under Smart Growth principles. Smart Growth principles have been considered in both regions.
- Relative funding priorities for transit and highway projects were suggested. The strategies recommend capacity expansion for alternative forms of transportation – Bus Rapid Transit, carpools, and high-speed rail. Transportation project priorities should be established as part of an overall programming process that addresses interregional commuting as one of several project funding issues.

[119] San Diego Council of Governments, *I-15 Interregional Partnership, Final Report*, June 30, 2004, Pg. 44.

- There is a need for continued monitoring of the strategies that mitigate the interregional commute and advocacy for interregional issues. The IRP proposes the expansion of the existing monitoring activities to measure interregional commuting activities.[120]

Conclusion

Creating a balance of jobs with an appropriate work force is a moving target. Traditionally, housing is the initial type of development that flows into areas outside existing cities and urbanized areas, followed by employment. School teachers, retail workers, and other service employees are the first kinds of jobs to locate in new suburban areas. And in many areas, major employment centers providing a range of jobs follow. Beginning with the initial streetcar suburbs of the early 20th century, this pattern appears to be well established in America.[121]

While a forecast is not yet available, the implementations of the recommended economic development strategies are projected to help speed the development of appropriate jobs in southwestern Riverside County. [122] The focus of future IRP activities will be to increase technical and management jobs in southwestern Riverside County and moderate cost housing in the San Diego region.[123]

Even with the most aggressive implementation of the interregional strategies, commuting from southwestern Riverside County into the San Diego region is projected to increase. Under existing plans, interregional commuting can be expected to triple. However, if smart growth is actively pursued, it is projected that more than 95 percent of the households attracted by the growth of San Diego jobs would be accommodated within the San Diego region. Successful implementation of SANDAG's Regional Comprehensive Plan (RCP) will require incentives for Smart Growth development. An example of an incentive program that is being implemented is the pilot Smart Growth Incentive Program funded by $17 million in Transportation Enhancement funds available in FY 2005 to FY 2009. The lessons learned from the pilot program will be used to develop a longer-term $280 million Smart Growth incentive program funded by the TransNet local transportation sales tax measure. Funds will be distributed to local jurisdictions that are developing communities with a balance of jobs, housing and supporting infrastructure consistent with the Smart Growth "place types" identified in SANDAG's RCP.

[120] Ibid, Pg. 70.
[121] San Diego Council of Governments, *I-15 Interregional Partnership, Final Report*, June 30, 2004, Pg. 61.
[122] Ibid, Pg. 84.
[123] Ibid, Pg. 78.

Monitoring the Achievement of Strategy Objectives

Changes in land-use, travel or other behavior can be used to determine the resultant effects of an action. An example of an achievement measure would be the change in the number of transit riders in a corridor following the start of a new transit service.

Because achievement measures should reflect the success of a strategy in achieving its objective, a more general measure is proposed. For example, the housing strategies should together provide more housing for people who work in an area. As a result, the measure should be a reasonable balance of all housing and all persons employed in an area. The number of "infill" moderate-cost family units contributes to this mix, but the critical indicator is the overall balance of jobs and housing. Short- and long-range targets are being established for each performance measure.

A monitoring plan has been established to track progress toward accomplishing these objectives, and when necessary, direct staff toward remedial actions. The table on page 114[124], lists all program objectives and strategies and presents the measures used to monitor the success of the strategies in achieving the objectives.

To ensure accountability, measures have been established that both identify whether or not strategies have been implemented and the degree to which the strategies are achieving performance objectives. Targets are projected to be used to evaluate progress in achieving stated objectives. The monitoring plan for the IRP is designed to be consistent with SANDAG's RCP monitoring plan.[125] The RCP is the overarching planning document for all SANDAG programs. The structure of the I-15 IRP Performance Monitoring program was patterned after the RCP, using many of the same performance measures but for a specific geographic area. As the Regional Transportation Plan is updated, performance measures contained in that document are also being updated to be consistent with the transportation measures in the RCP.

The measurement and evaluation of these measures will be coordinated with other monitoring activities in the two regions. SANDAG is developing its RCP monitoring program. Monitoring of the interregional program should occur at the same frequencies and time as similar activities in both regions.

The implementation measures use readily available information. For example, Cal-Tans normally conducts vehicle occupancy counts on five-year increments. Comprehensive base information is updated to provide comparable information for the 10-year Federal Census data. The achievement measures will require IRP staff effort in contacting agencies responsible for each of the strategy areas.

[124] San Diego Council of Governments, *I-15 Interregional Partnership, Final Report*, June 30, 2004, Pg. 56.
[125] Ibid, Pg. 56.

Final Note

In November 2004 San Diego County residents voted to extend the local transportation sales tax measure, TransNet. The current sales tax measure is scheduled to sunset in 2008. The extended sales tax will be in effect until 2048 and will provide $9.5 billion in funding that will be directed toward the building of highways, mass transit, and bike paths. The sales tax passed with 67 percent of the county's electorate supporting passage.

Cal-Trans is funding the second phase of the San Diego/Riverside IRP due to specific interrelated issues in relation to the Department's ongoing efforts in interregional transportation studies. The studies are complimentary to the goals and policies of the Department's Interregional Transportation Strategic Plan and related interregional studies priorities.

I-15 IRP MONITORING PLAN[126]

OBJECTIVE	STRATEGY	IMPLEMENTATION MEASURES	PERFORMANCE MEASURES	PERFORMANCE TARGETS
IRP PROGRAM STRATEGIES				
Continue iIRP and jobs-housing balance program	P1 - Support/Sponsor legislation that addresses Jobs-Housing Balance Programs	• Advocate for/against legislation that impacts jobs-housing balance programs	• Pass legislation that supports jobs-housing balance programs	• Yes/No
	P2 - Actively engage in community/agency outreach	• Meet w/agencies, jurisdictions (staff and elected officials) and community groups	• Number and list of presentations	• 10 annually
ECONOMIC DEVELOPMENT			**GENERAL**	
Increase higher income job growth in housing rich communities of the study area	ED1 – Facilitate greater EDA collaboration	• Establish regular meetings between EDAs from both regions	• High-wage- cluster employment in southwestern Riverside Co. • Average wage in southwestern Riverside Co. • Jobs-worker in Riverside Co.	• TBD from employment cluster analysis
	ED2 – Improve job growth through employment cluster job promotion	• Conduct bi-regional employment cluster analysis • Implement programs to encourage job growth		• TBD by EDAs • 2010: 0.85 jobs-worker 2030: 1.0 job-worker
HOUSING			**GENERAL**	
Increase the supply of moderate cost housing in jobs rich communities of the study area	H1 - Provide a range of housing	• Update and implement Housing Elements in accordance with State law	• Moderate cost housing in the San Diego region • Housing Affordability Index • Ratio of new jobs to new housing units	• TBD from San Diego RCP
	H2 – Support State-Local fiscal reform	• Support fiscal reform and comment on any proposed legislation		
	H3 – Provide incentives for moderate cost housing development	• Develop a incentive program for moderate cost housing		
	H4 – Require development of moderate cost housing	• Implement moderate cost housing ordinances		
	H5 – Encourage infill development in older residential neighborhoods	• Draft legislation to facilitate infill housing development		

[126]San Diego Council of Governments, *I-15 Interregional Partnership, Final Report,* June 30, 2004, Pg. 59.

(continued)

OBJECTIVE	STRATEGY	IMPLEMENTATION MEASURES	PERFORMANCE MEASURES	PERFORMANCE TARGETS
TRANSPORTATION			**GENERAL**	
Reduce the impact of interregional commuting on I-15 congestion	T1 Coordinate interregional car/vanpool programs	• Continue coordination of Rideshare Programs in Riverside and San Diego Counties, including vanpool, carpool, and transit services	• Average weekday peak period traffic at county line • Number of interregional vanpools • Peak period vehicle occupancy at county line • Average commute distance • Average commute time • Daily transit ridership	• TBD by responsible agencies
	T2 - Expand Park-and Ride lots and improve rideshare information signage			
	T3 – Conduct joint outreach and marketing for transit, vanpool and rideshare programs			
	T4 - Implement interregional transit services	• Continue interregional transit service		
	T5 – Foster collaboration among transit providers including public and private operators			
	T6 – Advocate for employer subsidized transit passes	• Continue coordination of TDM Programs in Riverside and San Diego Counties		
	T7 - Encourage the adoption of alternative work schedules			
	T8 - Encourage tele-work			
	T9 – Support high-speed rail service in the I-15 Corridor	• Actively support early implementation of high-speed rail service in the I-15 Corridor • Calif. High-Speed Rail Authority obtains funding to construct and implement service		
	T10 – Implement transit shuttle services	• Transit agencies and jurisdictions establish shuttle services to feed interregional transit services		
	T11 – Preserve transportation rights-of-way	• Transportation agencies identify needed right-of-way • Jurisdictions incorporate into General Plans		
	T12 – Implement high occupancy vehicle system on I-15 through the study area	• Incorporate interregional HOV facilities in SCAG and SANDAG Regional Transportation Plans w/ funding strategy		
	T13 – Coordinate highway facility planning along I-15 Corridor	• Establish regular meetings between RCTC, SANDAG, Caltrans Districts 8 and 11		
	T14 – Expand interregional bus service to include BRT services	• Implement BRT services along I-15		

SOUTHERN CALIFORNIA ASSOCIATION OF GOVERNMENTS (SCAG) IRP[127]

Project Description

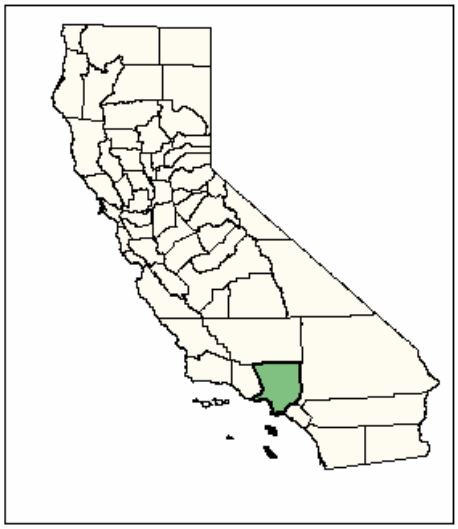
The SCAG partnered with the University of Los Angeles (UCLA), LA City, and the GAVEA. The focus of this study is the Antelope Valley, including the cities of Palmdale and Lancaster, as well as unincorporated areas of the Antelope Valley, and LA City. Within LA City, the specific study areas are Van Nuys/San Fernando Valley, the Central Business District, and the West Side of the City. These three areas have the greatest projected imports of workers in the city from Antelope Valley. The Antelope Valley is the focus of this study because projections estimate that there will be 145,000 daily a.m. work trips from Antelope Valley to south Los Angeles County by 2025. The LA City will be importing the greatest numbers of workers from the Antelope Valley, with over 70,000 workers commuting from the Antelope Valley to the south Los Angeles County highlighted the Jobs-Housing Balance topic. Through past work, the issues surrounding the jobs-housing imbalance were defined for the region. The partnership set upon three tasks to address the problem:

1. LA City In-fill Site Inventory;
2. Antelope Valley Industrial Site Inventory; and
3. Public Outreach and Education on the jobs-housing balance issue.

The unabated surge in housing prices and the need to accommodate continuing growth has fuelled interest in infill development as an alternative to metropolitan sprawl. As a response to this growth, this project required a broad approach and focused strategies. Accordingly, the draft growth vision for these regions advocates, not only for the use of existing land and resources more efficiently, but for new development patterns that will effectively address residents concerns such as traffic congestion, pollution, etc. The overall goal is to improve the quality of life for all of the region's inhabitants.[128]

An interactive GIS website termed "LA LOTS," was developed as a comprehensive information system and interactive web portal for land/development analysis within the County of Los Angeles. The interactive portal provides a platform for users to query as well as spatially map various possible sites for infill housing development. Users, such as housing developers, can now access and utilize this information through online mapping technologies, GIS to view and analyze various neighborhoods across the county to better identify areas for potential new infill-housing development.[129]

[127] *http://www.abag.ca.gov/planning/interre al/stateirp/los_angeles.htm*
[128] Southern California Association of Governments, *LA LOTS (Land Opportunity Tracking System),* June 30, 2004, Pg. S1.
[129] Ibid, Pg. S-6.



Study Area: Los Angeles County and City, Palmdale, Lancaster

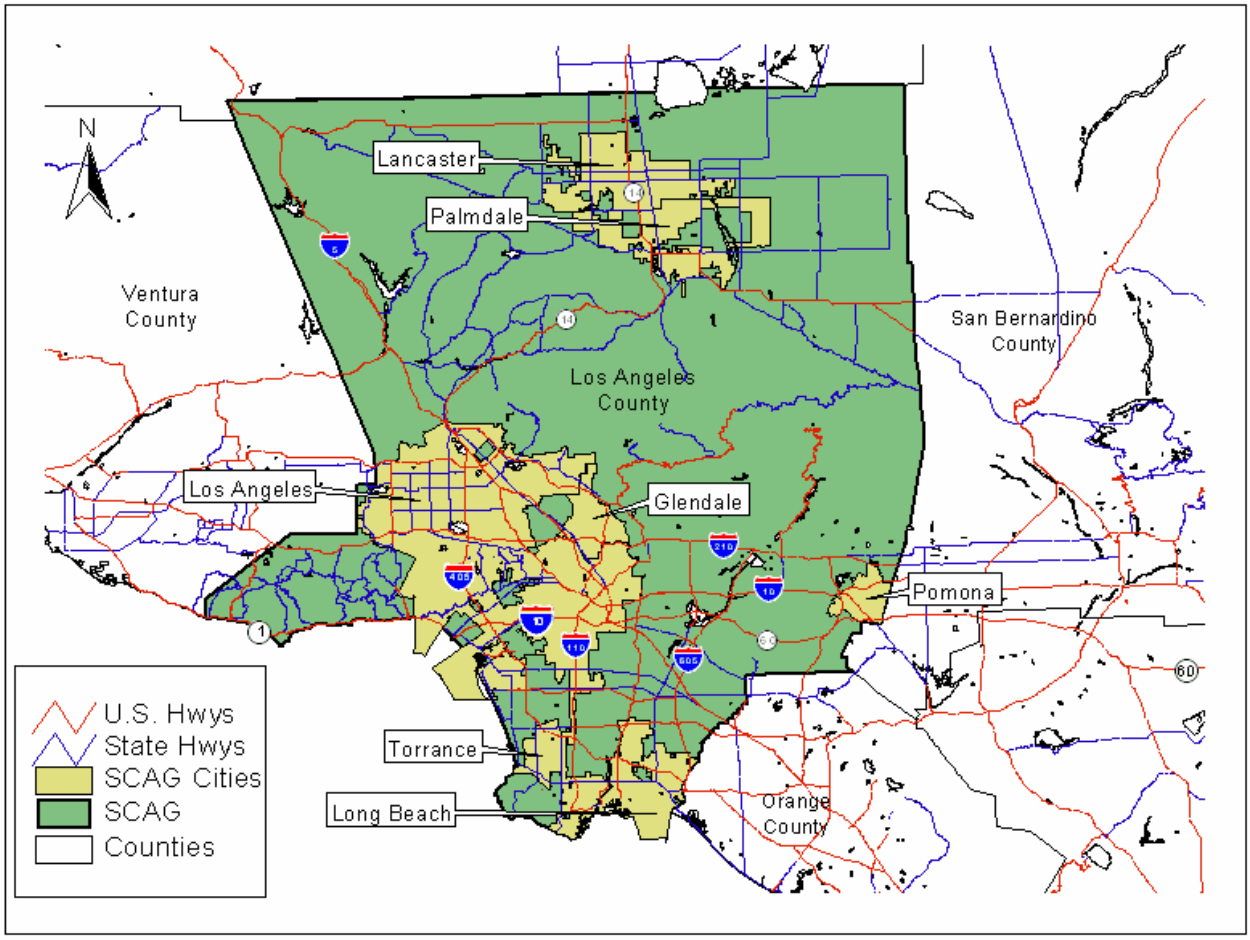
Total Population 2004: 10,102,961

Total Households 2004: 3,184,446

Square Miles: 4,061

Major Highways: Interstates 5, 10, 110, 405

SCAG IRP Study Area



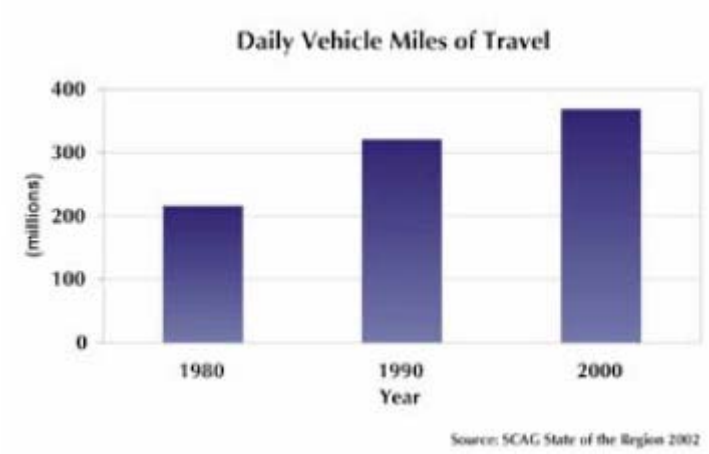
Existing Conditions

Los Angeles County is the most populous county in the State of California. The LA City is the most populous city in the State and is second only to New York City as the most populous city in the nation. Long the job center of the region, recent trends show a suburbanization of jobs to new job centers. Nonetheless, the LA City is the most important economic force in the county and the region with a population of 3,733,427 and an employment level of 1,769,255. Job clusters within the LA City are in the Central Business District, near the coast of the region on the west side of the City; the San Fernando Valley; and the eastern industrial part of the City.

Housing, land, and development costs play a large factor in why people live in the Antelope Valley and work in southern parts of the county. The median housing value for homes in the Antelope Valley is between $70,000 and $140,000 (GAVEA 2000, 13). The California Association of Realtors reports that the January 2001 median home price for the High Desert region was $104,510. This is well below the median new home price of $217,710 for the LA City (CAR 2001).[130]

The current jobs-housing imbalance between the LA City sub-region and the north Los Angeles County sub-region is projected to worsen. The job growth in north Los Angeles County, which can be characterized as jobs rich, has not been as vigorous as that of the Inland Empire. Forecast show that there are projected be over 215,000 daily A.M. trips from north Los Angeles County to south Los Angeles County in 2025 (SCAG 2000). If the projections hold, the commute from north Los Angeles County to south Los Angeles County are anticipated to become the worst in the region.[131] The coastal areas of the SCAG region are and will continue to be jobs rich. In 2000, the Los Angeles Metropolitan area (Los Angeles and Orange Counties) remained the most congested metropolitan area in the county in terms of hours of delay.[132] The average commute time increased in every county within this region with the average travel time to work increasing from 26 to 29 minutes between 1990 and 2000, an average that is significantly higher than the state and the national averages.[133]

[130] Southern California Association of Governments, *Application for Interregional Partnership Grant*, March 2000, Pg. 6.
[131] Ibid, Pg. 1.
[132] Southern California Association of Governments, *Southern California: Growth Vision Report*, June 2004, Pg. 14.
[133] Ibid, P. 14.



Jobs-Housing Balance

	Region	LA Basin	LA High Desert	Orange County	Riverside	SB Basin	SB High Desert	Ventura	Imperial
2000	1.39	1.42	1.21	1.61	1.02	1.25	0.8	1.38	1.5
2010*	1.45	1.49	1.03	1.74	1.05	1.05	0.91	1.36	1.4

*Projected Source: Compass Southern California: Growth Vision Report – June 2004, SCAG

GIS Methodology

GIS is a critical component of the tools needed to carry out the work in addressing the jobs-housing imbalance. This technology was used extensively for analysis purposes and will be used for the public outreach campaign to visually display parcels suitable for in-fill development. Partners are projected to use GIS to map potential sites for in-fill housing development by compiling and analyzing county assessor data. By overlaying several themes, the resulting GIS maps are projected display numerous pieces of information, including:

- Distance from parcel to transportation networks;
- Parcel size;
- Parcel zoning; and
- Current zoning around parcel.

By visually displaying opportunities for in-fill housing development, stakeholders will be alerted to potential parcels that they previously would not have known existed. By encouraging in-fill housing, particularly around transit lines, the GIS used in the analysis can guide the steering committee to develop strategies that are likely to mitigate the negative effects of jobs-housing imbalance between Los Angeles, City and north Los Angeles County [134]

[134] Southern California Association of Governments, *Southern California: Growth Vision Report*, June 2004, Pg. 10.

Constraints and Opportunities Affecting Jobs-Housing Balance (External Factors)

The City of Los Angeles has abundant land zoned for commercial and industrial purposes. A study of 1993 zoning plans shows that while the ratio of developed residential land to developed employment land is 3.1:1. The ratio of vacant residential land to vacant employment land is 2.0:1. This shows that land that is available for some form of development is zoned for non-housing uses more often than it has been in the past. This limits the amount of land that can be developed as housing and impedes the achievement of a jobs-housing balance in the county. The City of Los Angeles creates 5.9 jobs for every one housing permit that it issues (Puri 2000). This ratio is high compared to the 3.7 jobs per building permit issued in southern California and the 2.0 jobs per building permit issued in the State of California. [135]

Findings

This new development information system was conceptualized as an interactive web portal that can serve the following main objectives:

- Provide comprehensive and timely information.
- Provide information that can be queried, that is intuitive and that has easy to use interfaces.
- Provide online mapping technologies (GIS) so that users could perform spatial analyses so to better identify locations for infill development.

In addition, building a web-based system to promote infill development provides the following advantages:

- Leverages the system's scalability, providing access to data and analytic tools for wider geographies. Although funding was provided to build a system that supported infill near transit stations in the LA City, Advanced Policy Institute (API) was able to leverage the resources to construct a platform that covers the entire county including transit nodes outside of the municipal boundaries.
- Employs an interactive platform that allows users to navigate and explore seamlessly across layers of property and area data.
- Provides flexibility to enable the updating of existing information and the addition of newer data sets.
- Because API specializes in the use of web-based technologies to support community development objectives, API was able to provide to provide a dollar-for-dollar match of $50,000.

[135] Southern California Association of Governments, *Southern California: Growth Vision Report*, June 2004, Pg. 10.

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Strategies

Short-Term

Although these are promising routes, a number of common challenges emerge in initiatives that pursue such infill development strategies such as:

- Identifying potential sites of sufficient size for development or assembling land for contiguous or scattered site development.
- Identifying abandoned, deteriorated and other under-utilized properties that can be redeveloped for new housing.
- Identifying emerging new housing markets/employment zones where demand for residential opportunities are beginning to grow,
- Identifying communities near transit nodes, redevelopment areas, and with specific plans that provide localized incentives.

[136] Southern California Association of Governments, *LA LOTS (Land Opportunity Tracking System)*, June 30, 2004, Pg. 3.

The largest obstacle is access to all of the details that are needed in identifying opportunities for new projects. Because of the difficulty in securing complete and timely access to such information, more attention must be focused on how the "information barrier" creates a major hurdle to promoting infill development. Under contract with SCAG, the UCLA Advanced Policy Institute therefore designed and built a system that would provide easy access, not only to data that can inform and support infill development, but also user friendly online tools, including mapping and statistical analysis.[137]

Economic Tasks of the Project: GAVEA

- To assemble an inventory of industrial property and to develop GIS capabilities for future site assessment and out reach activities.
- To establish an electronic database for industrial sites in the Antelope Valley aerial and Assessor's Parcel Number.
- Develop a plan that more fully utilizes existing major buildings in the Antelope Valley for wealth creating opportunities.
- Develop a plan to provide adequate industrial space opportunities in a timely fashion.
- Develop a plan to promote entrepreneurial use of available government land and buildings associated with Plant 42.
- The ancillary purpose of the analysis is to establish a basis for integrating the empirical data with statistical information and to create a balanced analytical system that will respond not only to historical information and current empirical observations, but provide a basis for anticipating future needs.
- This information can be compared in order to provide a definitive evaluation of absorption of industrial space and provide a basis for making recommendations about the type of product that is undersupplied in this market; and to serve as a resource to potential employers considering expanding or relocating to the Antelope Valley in terms of defining availability of space that meets their requirements.[138]

Final Internal Assessment of Outcomes – Conclusions

In the beginning, the plan was to market primarily business within California. Through contact with other regional economic agencies and inquiring about their experience and efforts to bring businesses to California, we found this target market to be the highest and best use of available funds and they were in agreement with our strategy. Early in the grant process, the general business climate of California was viewed nationally as being unfriendly and too costly for businesses to consider locating in California. It was therefore believed that funds and effort should be concentrated on retention and expansion of businesses that already exist within California. With the change in governmental administration, there may be new opportunities for outreach beyond the borders of California, as greater emphasis is placed on the creation a more business friendly environment.

[137] Southern California Association of Governments, *LA LOTS (Land Opportunity Tracking System)*, June 30, 2004, Pg. S1-2.
[138] Greater Antelope Valley Economic Alliance, *Jobs/Housing Balance Interregional Partnership*, Pg. 5-6.
www.aveconomy.org

The creation of jobs within the Antelope Valley has significantly reduced the number of commuters. In the year 2000, the number of commuters was 56,500.GAVEA did a study in early 2004 which indicated a reduction to 52,380. This in part could be attributed to a general national economic recession. However, the cities and GAVEA are inclined to believe that it is their combined efforts and their aggressive marketing that has contributed to the decline. This study, the states funding of the study, and its resultant statistical and marketing efforts are just one of the many important tools used to work towards the goal of job-housing balance in the Antelope Valley.

In order to maintain statistical information for the future use, updates will be required along with continued maintenance, to provide up to date information and statistics to aid in promoting the area to outside site selectors will "need a quick turn around" and timely information. Current information is vital for Antelope Valley to compete on a national level to attract and retain businesses. SCAG, as well as the cities, must be prepared and armed with every tactic possible if they are to attract businesses to the Antelope Valley and be able to compete with other areas of the nation. Not only is current information vital, it must be in an accessible format so it can be given to national site selectors in a timely fashion. The reputation of GAVEA and its desire to become a recognized credible regional economic entity is dependent upon its ability to respond quickly and with and up to date information.[139]

[139] Greater Antelope Valley Economic Alliance, *Jobs/Housing Balance Interregional Partnership*, Pg. 54. *www.aveconomy.org*

WESTERN RIVERSIDE COUNCIL OF GOVERNMENTS (WRCOG) IRP[140]

Project Description

The WRCOG worked with the OCCOG to address both the causes and impacts of a growing jobs-housing imbalance in the two-county area. They joined forces in 2001 to form the SR-91 IRP. Other affected governmental agencies and non-governmental organizations also participated in the partnership. The project was primarily funded through a grant from the Department as part of the State's Jobs-Housing Balance Grant Program, with matching in-kind services provided by WRCOG and OCCOG.

The IRP conducted research and evaluated tactics for changing the existing imbalances and mitigating its adverse effect on the SR-91 commute shed. The counties involved were Orange and Riverside, with focus being directed the western part of Riverside County. The study centered on State Route 91 Corridor. This inter-county commute shed extends from north central Orange County to the gateway cities of Corona, Norco, and Riverside, and Moreno Valley, as shown on Map 1: IRP Study Area.

The major issues the partnership focused on and reviewed were:

- Inflated housing prices near "new economy" job centers,
- Displacement of low and moderate income groups near job centers, and
- Increased commutes from Inland Empire to Orange County.

The IRP's three-year work program focused on the following tasks:

- Document Existing Conditions.
- Document Current Programs to Resolve Issues.
- Develop Strategies to Better Balance Jobs and Housing
- Establish an Implementation and Monitoring Process.

[140] *http://www.abag.ca.gov/planning/interregional/stateirp/sr91.htm*

Study Area Counties: Orange, Riverside, including 58 cities

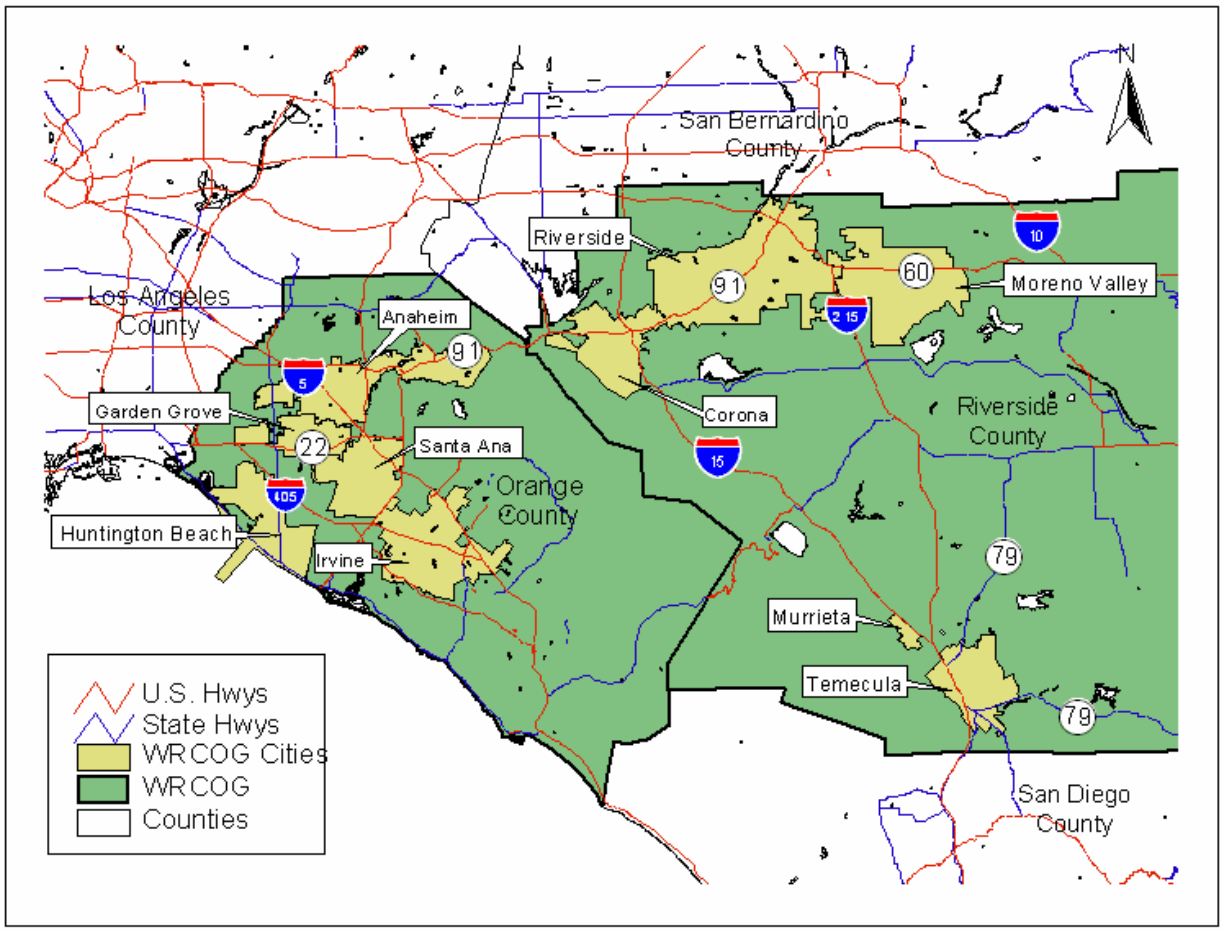
Total Population 2004: 4,794,041

Total Households 2004: 1,540,018

Square Miles: 7,996

Major Highways: Interstates 5, 15, 215, 405

WRCOG IRP Study Area



Orange County – Western Riverside County

Existing Conditions

Orange County Today:

Demographics
- Well-educated labor force.
- Rapidly rising home prices.
- Numerous high-end businesses.
- More jobs than local workers to fill them.

Orange County is Running Out of Residentially-Zoned Lots
- Housing supply has not been able to expand enough to meet demand. As a result, home prices have soared.
- Housing is increasingly unaffordable.
- It is becoming difficult to house new families.
- Even upper middle class families are being forced out of the market.
- Under 17 percent of families can afford the median-priced home, despite the highest incomes in southern California (July 2004).
- A large percentage of lower-paid service workers have to live outside the County.

High Density Per Home
- Flat housing levels and increasing population means greater densities, especially in the north and central parts of the County.

Lack of Industrial Space
Lack of Industrial Space - Shortage of undeveloped industrial land in the face of the continuing demand for space.

- High cost of company operations -Highest lease rates and highest average wages and salaries paid in southern California, making it increasingly difficult for companies to compete.
- Commuter difficulty - Orange County firms must rely on workers residing in Western Riverside County and adjoining counties.

Riverside County Today:

Demographics
- Young and rapidly growing population.
- Modestly educated labor force.
- Numerous blue collar and entry-level firms.
- Fewer jobs than resident workers, despite rapid job growth.

Land Resources
Wealth of undeveloped residential & industrial land, resulting in:

- Thousands of homes across a wide price range.
- Reasonably priced industrial buildings. A broad spectrum of workers migrating to the County to find affordable housing.
- Numerous manufacturing and distribution firms locating in the County.

Income
- Low per-capita income of 20,288 (Census 2003 estimates).
- Education and Occupations.
- 17 percent of population has a bachelors degree or higher.
  - 28 percent in management or professions
- Educational Challenge, to raise living standards, the County must:
  - Provide an extraordinary level of training to adult workers.
  - Provide children with the means to achieve upward social mobility.

Job Growth and Commuting
- 40,000 new jobs must be created annually to avoid gridlock on SR-91 Corridor.

Truck Traffic
- Continuous increaser in truck traffic is taking a large share of highway capacity. Truck traffic is expected to increase by 70 percent; at that level, it will consume most of the existing highway capacity.

Study Area

Population: Six of Orange County's cities, with a combined population of 1,054,536, had over 3.4 persons per occupied dwelling unit including Santa Ana at 4.6, the highest density of any city of over 75,000 people in California. By contrast, fast growing Riverside County had just four cities with a population of 260,414 that were over 3.4 persons per unit. Riverside County is in the midst of an aggressive population boom. From 1980 - 2002, it added 963,600 people. From 2002 - 2020, it is expected to add another 804,700 to reach 2.4 million.

Jobs: SR-91 commuters are more likely than their non-commuting counterparts to be employed in hi-tech/computers/internet, construction/labor, and light industrial/manufacturing industries. SR-91 commuters are more likely than their non-commuting counterparts to be employed in occupations that require training and education. They also receive higher salaries, on average, than their non-commuting counterparts.

Traffic: The current average daily traffic on the SR-91 between Western Riverside and Orange counties is between 200,000 to as high as 250,000 vehicles per day. Travel demand is expected to increase to over 400,000 vehicles per day by the year 2025. Based on a phone survey done by the IRP an estimated 49,000 people commute from Western Riverside County into Orange County everyday. Of those commuters, 41 percent start their commute before 6 a.m.

Jobs-Housing Imbalance: Across southern California there were 1.28 jobs per occupied dwelling unit in 2001. Orange County exceeded this level at 1.51. Riverside County had only 0.96 jobs per occupied dwelling unit.

Preference to Work Locally in Comparable Jobs: Despite their high levels of frustration with commuting, the vast majority of SR-91 commuters indicated that they were simply not prepared to make the trade-offs necessary to live near their current employers. On the other hand, seventy-two percent of SR-91 commuters indicated that they would be interested in working locally if they could have a comparable job that paid the same as their current job. If the job involved a 10 percent pay reduction, 38 percent stated that they were still interested.

Methodology

The IRP based its strategies on a comprehensive collection of primary and secondary research. The research effort was guided by elected officials, serving as policy advisors, and by COG staff and public/private-sector participants, serving as a Technical Working Group.

A telephone survey of Western Riverside resident commuters was conducted during July and August of 2002. The survey was designed to profile residents and inter-regional commuters and gain a better understanding of the factors, rationales, and decisions of long distance commuters that lead them to live so far away from where they work. This information along with pertinent land-use, transportation and economic data was used to develop and evaluate strategies to bring jobs and housing into better balance in both counties. The results of a commuter survey conducted by the IRP provide insights into the causes of inter-regional commuting. The results are discussed later in the report.

Accomplishments: A thorough inventory of vacant and under-utilized lands near existing job centers and transportation nodes/corridors in Orange and Western Riverside counties was prepared for the IRP by the Center for Demographic Research at California State University, Fullerton. The site maps were reviewed with city and county planning staff during 2003.

Benefits: The land identified through this process shows the potential capacity of nearly 80,000 dwelling units (the number of units that could be produced given a moderate level of density of 12 units per acre). This represents a 75,000 unit potential in Orange County and 4,900 units in the selected portions of Western Riverside County, Corona, Norco, and Riverside, identified as the gateway cities for Orange County.

Next Steps: The inventory of potential in-fill sites cannot be considered complete until each of these parcels has been physically evaluated and the capacity of individual parcels determined.

Constraints and Opportunities Affecting Jobs-Housing Balance (External Factors)

Neither county can realistically meet its own local employment needs without facilitating the movement of workers between both sub-regions. It is also unlikely that the surplus of workers in Riverside County perfectly matches to the surplus of local jobs in Orange County, and visa versa. As result, neither county offers all of the resources needed to overcome the principal challenge facing the other.[141]

Historically, the geographic imbalance between jobs and housing in metropolitan areas has been a problem that has been largely self-correcting. Jobs have moved from their original centers to housing-rich suburbs to take advantage of lower land and labor costs and to provide shorter commute trips for their employees. The end result is the multi-centered urban fabric that characterizes the southern California Region today. However, factors that work against the process of equalizing jobs and housing today include: the availability and cost of land for housing, commerce and industry, labor market factors, travel versus land costs, local land-use practices that downzone properties, restricted land zoned for multi-family housing, and delays that add costs to the entitlement process.[142]

Findings: Jobs-Housing Gaps

In general, there are not enough homes being built to meet the needs of our growing families and new families that form. Unless the capacity is increased to develop more homes, apartments, and condominiums to meet the needs of a growing population, continuing increases in housing costs and traffic congestion that could pose a threat to the quality of life can be anticipated.

Metropolitan growth is a dynamic process that involves the interaction of numerous factors (e.g., housing, employment, convenience, access, investment and operating cost, location preferences, etc.). These interactions tend to create "hot zones" at any given location and time. A hot zone usually emerges when a given area begins capturing disproportionate amount of growth relative to other areas in the same region. A region's need for space to sustain increased economic activity strongly influences the distribution of job increases, housing starts, traffic congestion, and wealth accumulation over a given time frame. This dynamic process follows a relatively predictable pattern summarized by three stages of growth:

[141] Western Riverside and Orange County, *Jobs/Housing Balance Project Final Report*, December 31, 2004, Pg. 14.
[142] Western Riverside and Orange County, *Jobs/Housing Balance Project Final Report*, December 31, 2004, Pg. 7.

Stage 1 - Homes, Commuters, and Population Serving Jobs: Economic growth is first characterized by outlying residential development where a vast majority of residents may commute to jobs in more central locations. The growth in household population, however, drives demand for population-serving land-use activities (e.g., retailers, schools, consumer service providers) and associated service sector jobs. The area emerges as a hot zone for housing.

Stage 2 - Big Space & Lower Cost Labor*:* Vast amounts of low cost land and relatively low labor cost begins attracting industrial enterprises with limited value-added potential (such as distribution activities). Industrial activities attracted to the area are in need of lower cost facilities and do not rely on a large pool of highly-specialized work skills. The area emerges as a competitive hot zone for select sectors of employment growth and associated industrial development. Housing in the area continues to remain cost attractive. The area employment base continues to expand but does not yet constitute a self-generating economy.

Stage 3 - High-End Firms & Workers, Mass Poor Migration: As the area progresses through stages one and two the amount of available space becomes limited relative to the level of demand driven by economic activity. This process increases the complexity and cost of providing housing, commercial and industrial space, transport of goods, operating labor, etc. Vibrant economic activity continues to be facilitated by regional preferences for intrinsic attributes of the area (e.g., coastal climate, amusement and cultural amenities, institutes of higher education, executive housing). Over time, however, attractive growth opportunities become increasingly focused on firms that utilize high-skill labor and engage in high value-added processes (e.g., biomedical, instruments and electronics, financial services). Concurrently the income structure of area households becomes increasingly bifurcated. Sustained economic growth must now address challenges associated with housing affordability, overcrowding, commuter congestion, labor wage, and cost of living disparities.

As Orange County moves deeper into full economic maturity, it is beginning to face some of the negative aspects of southern California's traditional development cycle. As previously mentioned, with undeveloped residential real estate disappearing in Orange and San Diego Counties, Riverside County is in the midst of an aggressive population boom.

Commuter Survey for SR-91: The results of a commuter survey for SR-91 Inter-Regional Commuters provided insights into the causes of inter-regional commuting. The following is an overview of the findings.

Behavioral/Attitudinal Characteristics of Inter-Regional Commuters: Housing affordability and preferences are the first two keys to understanding why people live in Western Riverside County and commute to jobs in Orange and Los Angeles counties. The survey results paint a convincing portrait that SR-91 commuters' strong preference for single-family detached homes, coupled with the greater availability and affordability of this type of housing in Western Riverside County, has tempted many former Orange County and Los Angeles County residents to move to Western Riverside County and endure the commute to their work places in Orange or Los Angeles Counties.

Inter-Regional Migration: Over half (52 percent) of SR-91 commuters have lived in Western Riverside County less than 10 years, and nearly 70 percent of SR-91 commuters originally moved to Western Riverside County from either Orange or Los Angeles Counties. The dominant reason for the inter-regional migration is the availability and cost of the housing type.

Cost of Housing: When asked why they moved to Western Riverside County in an open-ended question, 58 percent of SR-91 commuters stated that they moved to Western Riverside County because of the lower cost of housing/cost of living in the area.

Lack of Comparable Jobs: During the focus groups, SR-91 commuters complained almost in unison about the lack of comparable jobs available in Western Riverside County.

- SR-91 commuters are more likely than their non-commuting counterparts to be employed in hi-tech/computers/internet, construction/labor, and light Industrial/manufacturing industries. The main difference is with respect to their occupation.
- SR-91 commuters are more likely than their non-commuting counterparts to be employed in occupations that require training and education. They also receive higher salaries, on average, than their non-commuting counterparts.

Job Stability: One of the more interesting findings, moreover, is that SR-91 commuters exhibited greater job stability when compared to their non-commuting counterparts.

Commuter Alternatives: The survey also suggested several short-term opportunities dealing directly with the traffic congestion associated with SR-91 commuters:

- 20 percent of SR-91 commuters indicated that their employers allow them to telecommute at least once per week;
- 23 percent stated that their employers sponsor carpools, vanpools or other programs;
- 47 percent indicated that they are allowed to adjust their work schedules (also known as flex-time).

Convincing more commuters to take advantage of these alternatives will help to reduce peak commute congestion.

Preference to Work Locally in Comparable Jobs: Despite their high levels of frustration with commuting, the vast majority of SR-91 commuters indicated that they were simply not prepared to make the trade-offs necessary to live near their current employers. They also expressed a high level of satisfaction with living in Riverside County. On the other hand, developing more jobs in Western Riverside County that are comparable to those currently filled by SR-91 commuters is a strategy that the survey suggests could be effective in enticing a substantial number of SR-91 commuters to work locally, rather than commute. Seventy-two percent of SR-91 commuters indicated that they would be interested in working locally if they could have a comparable job that paid the same as their current job. If the job involved a 10 percent pay reduction, 38 percent stated that they were still interested.[143]

[143] Western Riverside and Orange County, *Jobs/Housing Balance Project Final Report*, December 31, 2004, P.21

Effects of Imbalance: There are a number of ways to characterize the imbalance in jobs and available workers based on the survey results. The most obvious symptom is traffic congestion, particularly on SR-91. It is estimated that 54,591 Western Riverside County residents commute to Los Angeles County and 49,030 commute to Orange County for work purposes. Based on the survey results, 44 percent of commuters who travel to Los Angeles County and 83 percent of Orange County commuters use SR-91 when commuting. Combining the commuters for both destinations yields 64,715 individuals who commute on SR-91 on a regular basis to Los Angeles County or Orange County from Western Riverside County.

While it is clear that Riverside County must export labor, and Orange County must import it, there are difficulties in quantifying the changing status of this relationship. Many Riverside County residents work in San Bernardino County and visa-versa. Orange and Los Angeles counties, similarly, exchange workers. [144]During the focus groups, SR-91 commuters complained almost in unison about the lack of comparable jobs available in Western Riverside County. They voiced the belief that either a job similar to theirs does not exist in Western Riverside County, or that the pay rate is considerably lower in Western Riverside County. Long daily commutes also lead to a quality of life issue when the commuter spends too much time in the car, which causes stress and takes away from personal, family and community activity time.

IRP Guiding Principles

The IRP supports the following Guiding Principles in implementing individual and collective actions to address future growth and development challenges in the two-county area. These principles are expected to remain applicable through the long term, although refinements may occur from time to time.

IRP Strategy: The IRP Strategy encourages development that takes place in the context of a local & inter-regional growth strategy; is integrated into the fabric of existing communities; and provides a mix of land uses, open spaces, housing & transportation options.

Removing Barriers: The IRP supports initiatives and actions that make it easier to develop or redevelop a community that integrates commercial and residential uses; provides transit, walking and bicycling opportunities; and protects environmental resources— all key components of the IRP Strategy.

Economic Vitality: The IRP Strategy was developed in the contest of regional economic and policy realities. Fundamentally, it is about providing more, not fewer choices for our residents.

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[144] Western Riverside and Orange County, *Jobs/Housing Balance Project Final Report*, December 31, 2004, Pg. 12.

Capacity: All measures and actions that would draw upon COG and local government resources are understood to be limited to the extent that financial, staff, time, and other resources are available.

Continuity: A sustained, cooperative program will improve the chances of implementing the IRP Strategy, improving the relationship between jobs, housing, transportation, and maintaining the quality of life in the two-county area.

Cost Effectiveness: It is understood that all resources, whether public or private, cost something; nothing is free. Therefore, respective COGs, counties, cities, businesses, stakeholder groups, and individuals need to focus their limited resources on actions that reinforce existing commitments. Cost effectiveness is a fundamental consideration in selecting and implementing IRP Initiatives.

Coordinated Commitment and Partnership: The IRP encourages creative partnerships with other levels of government and the private sector. Strategies pursued by multiple local governments within the two-county area (in a coordinated fashion) will be more effective than independent commitments to policies that seek to influence issues that transcend local boundaries and balance jobs, housing, and transportation.

The business community may find it less costly to implement strategies if they are consistently implemented in jurisdictions throughout the two-county area.

Public Education: Public education and awareness is critical to the successful adoption and implementation of actions to mitigate the impacts of rapid growth and jobs-housing imbalances in the two-county area. The public must be confident that these actions play an important role in maintaining the quality of life in Orange and Western Riverside counties to achieve widespread support.

IRP Strategy Overview

In response to the findings, the Policy Committee and the Technical Working Group played an active role in identifying and evaluating inter-regional strategies. Over a period of more than a year, the IRP considered potential strategies to better balance housing and jobs within Orange and Western Riverside counties. Public participation and outreach has been an integral part of the IRP work program to date.

Staff pursued a preliminary public involvement effort to engage IRP participants. Public outreach was later conducted when initial recommended strategies had been identified. WRCOG and OCCOG, have information on their websites that provide detailed and timely information on program developments. Stakeholders were regularly notified of IRP meetings through e-mail and direct mail.

As a result, the partnership endorsed the following strategies to accelerate the offset of jobs-housing imbalances in the two-county area:

- Providing housing close to employment centers in locations and at densities that encourage the use of transportation demand management strategies such as transit and van pools;
- Locating employment centers and job opportunities in closer proximity to predominantly residential communities;
- Promoting in-fill and mixed-use development and other planning techniques to make employment centers easy to walk to or reach by transit;
- Engaging the business community in strategy development and implementation, and
- Developing local incentives, economic inducements, and targeting research and education to affected stakeholders. [145]

The following tenets serve as the foundation for the initiatives that would implement the strategies.

Use in-fill development on under-utilized sites to improve the jobs-housing balance. The use of in-fill in aging and under-utilized sites provides a means to accommodate growth and to efficiently use existing infrastructure.

Focus growth along transit corridors and nodes to improve access to transit and utilize available capacity. Many existing corridors lack the residential and commercial density to adequately support non-auto uses. By intensifying these corridors with mixed-use developments, the existing transit system can more fully realize its potential for accommodating additional trips, taking the strain off systems that are already at or over capacity.

Provide housing opportunities near job centers and job opportunities, where appropriate, in housing-rich communities. Balancing the location of jobs and housing is an important strategy in meeting Regional goals for relieving congestion, reducing commute times and trips, encouraging alternative modes of transportation, and improving air quality. The IRP seeks to achieve these goals by encouraging in-fill development that locates both job and housing centers in targeted areas suitable for accommodating additional growth.

Provide housing opportunities to match changing demographics. Changing demographics will have an impact on the economic future of the Region. The large "baby boom" generation is projected to begin retiring after 2010. Other changes on the horizon include increased immigrant population, increased household size and lower per capita income. These changes necessitate variations in the housing types offered as well as amenities to serve the changing population.[146]

[145] Western Riverside and Orange County, *Jobs/Housing Balance Project Final Report*, December 31, 2004, Pg. 22.
[146] Western Riverside and Orange County, *Jobs/Housing Balance Project Final Report*, December 31, 2004, Pg. 23.

Short- & Long-Term Initiatives[147]

The IRP Policy and Technical committees considered many short-term initiatives for transportation, housing, and economic development before selecting those initiatives that they wished to focus attention on in the short-term. The following criteria were adopted by the IRP Policy Committee in its evaluation of Short-Term Strategies:

- Six month to one-year implementation timeframe;
- Use of existing resources to be used to implement the strategy;
- Measurable impact;
- Pave the way for longer-term policy recommendations; and
- Reflect inter-regional cooperation.

Land Supply

Opportunity: As the supply of vacant parcels diminishes, another large pool of land exists—under-used parcels that can be redeveloped. These under-used parcels will become increasingly important in accommodating growth.

IRP Initiative: Member jurisdictions are working to increase the amount and quality of in-fill development. Many impediments to in-fill can be addressed by local government action, resulting in a more favorable climate for re-investment in existing urban areas. For in-fill to meet its potential, it is important to systematically identify the key obstacles currently hindering in-fill development and to work out solutions.

Accomplishments: A thorough inventory of vacant and under-utilized lands near existing job centers and transportation nodes/corridors in Orange and Western Riverside counties was prepared for the IRP by the Center for Demographic Research at California State University, Fullerton. The site maps were reviewed with city and county planning staff during 2003.

Benefits: The land identified through this process shows the potential capacity of nearly 80,000 dwelling units (the number of units that could be produced given a moderate level of density of 12 units per acre). This represents a 75,000 unit potential in Orange County and 4,900 units in Western Riverside County identified through this process.

Next Steps: The inventory of potential in-fill sites cannot be considered complete until each of these parcels has been physically evaluated and the capacity of individual parcels determined.

[147] Ibid, Pg. 31.

New Housing Choices

Opportunity: The future population will demand more entry and mid-priced housing. It will place a premium on location and good access to work opportunities, services, and family.

IRP Initiative: Support development patterns that serve this important growing component of the suburban housing market with smaller-lot, higher-density, mixed-use suburban development. Support local government efforts to remove obstacles and facilitate the market for higher-density mixed-use development.

Accomplishments: The IRP's research assignments incorporated the following short-term actions in support of the IRP's Mixed-use Initiative:

- A Study of Policy and Regulatory Environment for Mixed-Use, based on General Plans and updated Housing Elements.
- A Survey of WRCOG-OCCOG Jurisdictions on Mixed-Use Development (July/August 2003).
- An Inventory of Proposed Projects in the SCAG Region 2002.
- A *Study of Build-Out Capacity* was prepared for Orange and Western Riverside jurisdictions that documented the amount of land and allowable density in each jurisdiction's General Plan land-use designation.
- A Tool Kit was prepared which provides information on how cities and counties can implement well-planned mixed-use developments. The Tool Kit guides jurisdictions through the initial stages of identifying, planning, and implementing mixed-use projects in their jurisdictions. A complimentary video presentation identifies the need for in-fill and mixed-use development and provides examples of successful projects. Public outreach efforts have focused on educating elected officials, stakeholder organizations, and the community about in-fill and mixed-use development.

Benefits: Locating a mix of land uses together—residential, retail, civic, and office—encourages the integration of work, home and daily activities. A mix of uses contributes to a more compact development pattern, which will have a major influence on our ability to create efficient and cost-effective transit routes and service levels.

Next Steps: Work with IRP jurisdictions to use available tools to plan and implement mixed-use projects in their jurisdictions. Take actions that will facilitate public understanding and support for a shared vision of how to implement in-fill and mixed-use strategies that are complimentary to local goals.

Building a Housing Policy Agenda

Opportunity: Affordable housing for all income levels—for daycare providers, teachers, and firefighters, as well as executives-- is the key to the preservation of a good quality of life, stable families, healthy communities, and economic prosperity. However, public opposition to new home development and NIMBY attitudes affect our elected officials' ability to say "yes" even in the face of compelling need. An educated public—aware of the community benefits of new homes—will positively influence and impact their community's decision-makers and elected officials to promote public policy that values our "built" environment as importantly as they now value their "natural" environment.

IRP Initiative: Engage the public in a dialogue working through the issues, videotape, and then broadcast results to enlighten a wider audience (expanding exposure). The dialogue process will frame and build a consensus on a public policy agenda that supports new home development.

Accomplishments: A dialogue process has been designed to assess residents' views on the housing situation change as they learn more about the issues and work through some of the difficult tradeoffs involved in any sustainable solution. Fundraising efforts are underway to raise $300,000 to carryout the project. Financial commitments of $131,000 have been secured. KOCE has committed to be our media partner in the effort.

Next Steps: A Steering Committee will be established to oversee the project. Final products will include: a marketable video for public education and broadcast; a consensus pubic policy agenda for future stakeholder action; message development and choices; better educated public and civic leaders; resulting in less opposition to new homes.

Business Site Selection

Opportunity: Businesses wishing to locate in Western Riverside County need answers to the following questions:

- Does the community have property available for this business?
- What are the market characteristics of the location? In other words, what kind of workforce is available there, and is there a market demand for the business' goods or services?
- Which nearby business will create synergy or competition? (This information is usually obtained by making numerous phone calls, visiting government offices, or searching a multitude of sites on the Internet or databases.)

IRP Initiative

Accelerate the process of new businesses locating in Riverside County by providing accurate information for perspective businesses in a timely and efficient manner; and create a cost-effective marketing tool for Western Riverside County in the form of an interactive, web-based database of available industrial and commercial sites and buildings.

Accomplishments

The IRP first surveyed jurisdictions in Western Riverside and Orange counties to determine interest in this marketing tool. Survey results indicate that the cities of Banning, Beaumont, Calimesa, Moreno Valley, Perris, Riverside, Norco, and the County of Riverside did not have a program like this in place and were interested in having the tool developed. Armed with this information, the IRP approached the Inland Empire Economic Partnership (IEEP) to discuss a joint effort. What has resulted is the creation of a technology application that provides on-line mapping, coupled with site selection and demographics. Specifically, this kind of program allows the user to map the exact locations of companies in a particular industry so they can see what kinds of industry clustering are happening in the area. On-line site selection can provide information that business prospects need about the Region, the community, and can even provide information for a particular building or parcel. This searchable database is integrated with other site selection analysis tools. Web-based GIS allows a site selector to look for a property that meets specific needs.

Next Steps

Work with IEEP to globally market the database. Explore the interest and feasibility of creating a similar technology application to market in-fill sites in Orange County jurisdictions with the Orange County Business Council.

Internal Evaluation of Strategies

Efforts have also been made by the respective COGs to leverage available staff resources and funding where feasible in support of IRP initiatives. This included WRCOG's use of federal planning funds under contract with SCAG that summarized existing and emerging economic development initiatives. It also included OCCOG's use of SCAG funds to conduct a "Growth Visioning Workshop" that focused on mixed-use development.

The Policy Committee was influenced by other factors, as well, in selecting which initiatives to pursue:

Transportation Strategies: At the onset, the Policy Committee determined that transportation system improvement strategies would not be pursued by the IRP in light of the recent establishment of the legislature's mandated two-county SR-91 Advisory Committee in 2003.

Economic Development Strategies: Following an in-depth study of existing and emerging economic development initiatives being undertaken by the public and private sectors in Western Riverside County, the WRCOG Board of Directors concluded that, "There is no single, sure-fire strategy to accelerate the sub-region's economic expansion." The Board noted that the County was already taking an array of aggressive approaches designed to accommodate and accelerate needed economic expansion. Significantly, it also noted that the Region's collective image and marketability suggested that jurisdictions should consider the advantages of "big picture" efforts at economic expansion as recommended in the IRP Strategy for Balancing Jobs, Housing, and Transportation. [148]

Performance Measures

These performance measures are measurable, quantifiable indicators of performance relative to the stated goals and objectives. Changes in land-use, travel or other behavior can be measured to determine the effects of an action. The performance measures identified below would indicate the extent to which the IRP strategies are meeting objectives.

- Use in-fill development where appropriate on underutilized sites to improve the balance of jobs and housing.
- Use of in-fill in aging and underutilized sites provides a means of accommodating growth and efficient use of existing infrastructure.
- Focused growth along transit corridors and nodes to facilitate transit use and utilize available capacity.
- Many existing corridors lack residential and commercial density to adequately support non-auto uses. By intensifying these corridors with mixed-use developments, the existing transit system can more fully realize its potential for accommodating trips, taking strain off systems that are already at or over capacity.
- Provide housing opportunities near job centers, and job opportunities, where appropriate, in housing-rich communities.
- Balance the location of jobs and housing. The IRP seeks to achieve these goals by encouraging in-fill development that brings together job and housing centers in areas suitable for accommodating additional growth.
- Provide housing opportunities to match changing demographics. The large "baby boom" cohort are projected begin retiring after 2010. Other changes on the horizon include increased immigrant population, increased household size and lower per capita income. These changes necessitate variations in the housing types offered as well as amenities to serve the changing population. [149]

[148] Western Riverside and Orange County, *Jobs/Housing Balance Project Final Report*, December 31, 2004, Pg. 44-45.
[149] Western Riverside and Orange County, *Jobs/Housing Balance Project Final Report*, December 31, 2004, Pg. 53.

Internal Assessment of Outcomes

As discussed in Chapter II, based on existing economic growth trends, Orange County are projected face a growing dependence on commuter labor, while Riverside County is projected slowly to reduce its need to export labor. Projections indicate that in the near-term:

- Orange County is projected to continue to function as a jobs-rich market in 2010
- (.54 per capita) exceeding the overall balance for the southern California economy (.43 per capita).
- In contrast, Riverside County is projected to better serve local employment needs in 2010 (.35 vs. 30 jobs per capita) but is projected to still represent a jobs-poor market due to a substantial increase in the working age population.
- A net deficit of resident workers in Orange County are projected exist in 2010 requiring 20 percent of local jobs to be filled by workers residing outside the County (San Diego, Los Angeles, Riverside or San Bernardino).
- By contrast, Riverside County is projected to have a net surplus of resident workers requiring 23 percent of these residents to jobs outside the County.
- Over the longer term, the forecasted increase is 415,000 housing units in the IRP study area for 2025. Some projections are as follows:
- Two-thirds of total houses are projected for Western Riverside County. In actual numbers, for each housing unit added in Orange County, two are projected to be added in Western Riverside County.
- On the other hand, the actual number of new jobs in Orange County (531,000) in 2025 is projected to exceed those in Western Riverside (311,000), despite its higher levels of population and housing growth.
- The population growth of Riverside and San Bernardino Counties is projected to require the inland Region to create 40,000 jobs per year. With the Region moving into the later stage of its economic development cycle, this is within its long term capability. However, it is projected not to solve the area's transportation dilemma for years to come. [150]

Conclusions

Housing Supply and Affordability: To improve the jobs-housing balance between Western Riverside and Orange County, additional housing opportunities are needed to be provided in Orange County. Overall, Riverside County should expect diminishing capacity for additional housing when in close proximity to Orange County (gateway markets). Diminished capacity in gateway markets is projected to impact affordability and increase demand for new housing in Central Riverside County. The near exclusive emphasis on low-density, detached product as the principal form of housing will continue to contribute to increased work/trip congestion outside existing gateway market areas.

[150] Western Riverside and Orange County, *Inter-Regional Partnership, Final Report*, Pg. 59-60.

Job-Creation/Workforce Employment: Concurrent with providing additional housing opportunities in Orange County to improve the jobs-housing balance, Western Riverside will need to provide additional employment opportunities. For Western Riverside County to become more economically diverse and create jobs closer to home for local residents, it is projected need to continue to encourage commercial and industrial development to grow and/or relocate within its borders. Economic development not only provides jobs for local residents, it also contributes significantly to establishing the tax base necessary to provide new and/or improved infrastructure and public services to support development.

Home/Work Mobility: Over the next 10 to 20 years, a fundamental requirement for sustained economic growth for both counties will be the ability to facilitate movement between home and work, to provide a greater supply of affordable housing in proximity to worker jobs in Orange County, and jobs in proximity to worker residences in Western Riverside. Economic and political impediments are will need to be removed that inhibits a significant increase in the housing stock in Orange County, and limits changes in preference that now favor coastal settings to conduct business -despite cost advantages inherent to inland locations. As a result, the jobs-housing gap is expected to persist in each respective county (in absolute terms); therefore indicating a great need to facilitate more efficient home/work mobility between both counties.[151]

[151] Western Riverside and Orange County, *Inter-Regional Partnership, Final Report*.

ASSOCIATION OF BAY AREA GOVERNMENTS (ABAG), COUNCIL OF GOVERNMENTS (STANCOG), AND SAN JOAQUIN COUNTY COUNCIL OF GOVERNMENTS (SJCOG) IRP[152]

Project Description

The IRP Pilot Project is a collaboration of three COGs – ABAG, the SJCOG, and the STANCOG. For this project, ABAG represents the counties of Alameda, Contra Costa, and Santa Clara Counties. SJCOG represents San Joaquin County and STANCOG represents Stanislaus County. ABAG was selected as the lead COG for the project. The IRP Pilot description provided here is an interim activity report for their IRP. Chapter 501, Statutes of 2003 (AB 501 – Torlakson), for the IRP Pilot provides that a final report is not due from this IRP until July 31, 2008.

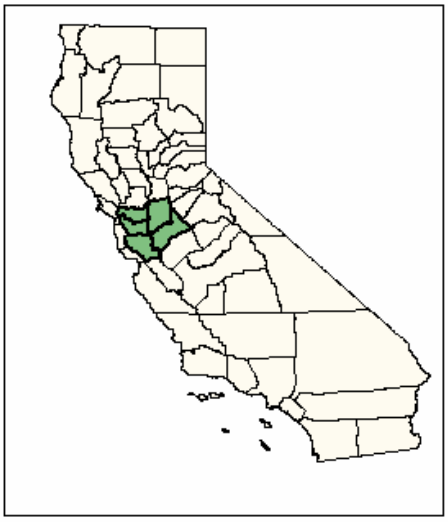
The major issues facing this area are:

- Job growth in the Silicon Valley and Bay area without commensurate housing growth, causing workers to buy housing elsewhere;
- Significant residential development in Central Valley, yet lower job growth coupled with high unemployment and low paying jobs; and
- Traffic congestion and projected worsening conditions on the Altamont Pass of Highway SR-580/SR-205, running between Alameda and the Stanislaus Counties.

The aim of this IRP Pilot Project is to improve the jobs-housing balance in the participating counties. Unique to the IRP Pilot Project was the establishment of Jobs-Housing Opportunity Zones (Opportunity Zones) within the participating counties. The IRP Pilot operationalized the IRP's strategy to balance jobs and housing in the participating counties by focusing development in designated areas called "Jobs-Housing Opportunity Zones".[153] The locations for ten Opportunity Zones were selected in July 2002. These zones identified sites to serve as designated receiver sites for jobs and housing in strategic areas to improve the current imbalance.

[152] Website: *http://www.abag.ca.gov/planning/interregional/stateirp/los_angeles.htm*

[153] Design, Community & Environment (Consultants) for ABAG, *Inter-Regional Partnership State Pilot Project Evaluation*, *Final Report*, July 1, 2004, Pg. 4.



Study Area Counties: Alameda, Contra Costa, San Joaquin, Santa Clara, Stanislaus, including 64 cities

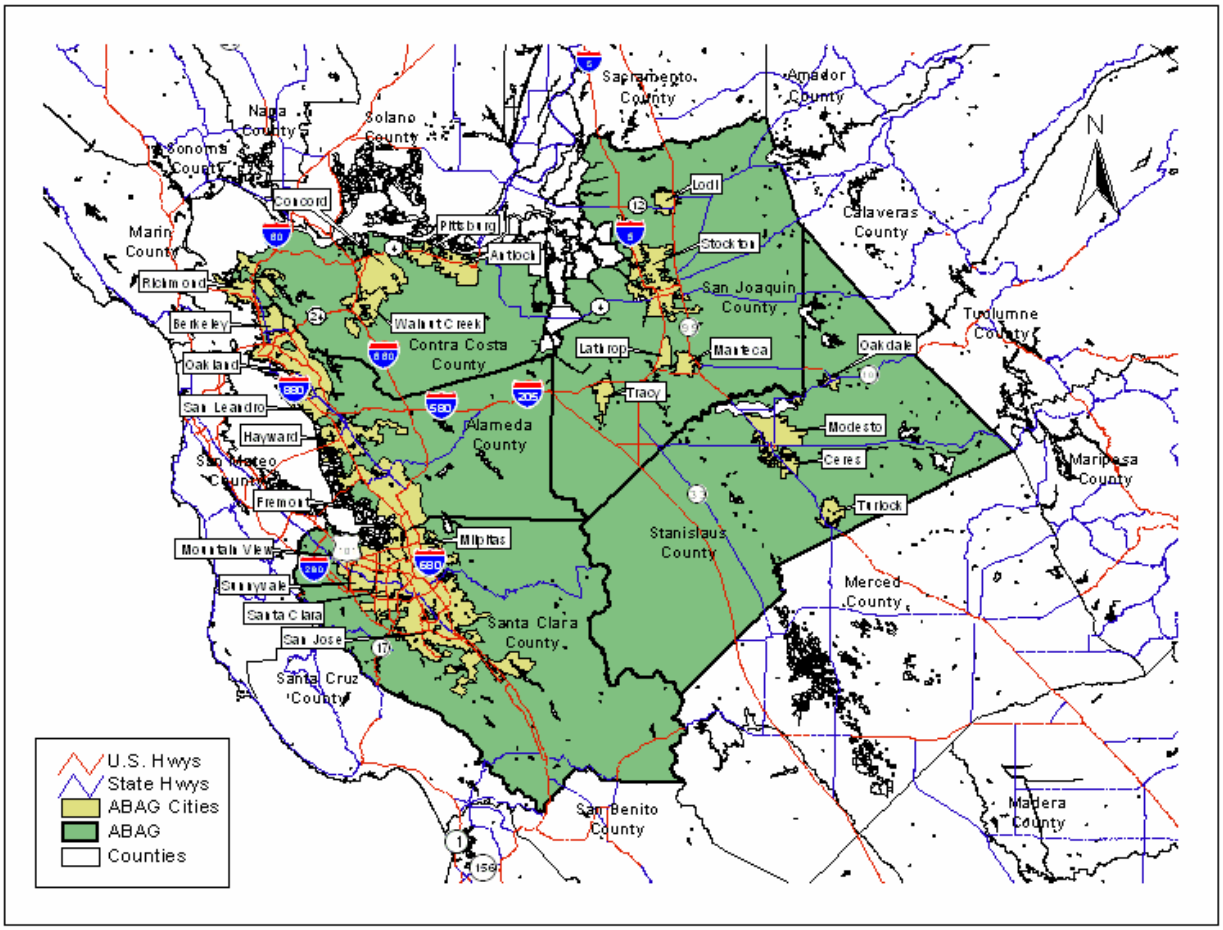
Total Population 2004: 5,355,857

Total Households 2004: 1,701,608

Square Miles: 5,642

Major Highways: Interstates 5, 80, 580, 680
US Hwy 101

ABAG IRP Study Area



Existing Conditions

This IRP was charged with four tasks in the project:

- Develop GIS for five-county area;
- Determine Opportunity Zones;
- Identify incentives for Opportunity Zones; and
- Evaluate effect of Opportunity Zones on jobs-housing balance.

One requirement of the IRP legislation effecting ABAG was to hire an outside consultant to evaluate the program. The consulting firm of Design, Community& Environment evaluated the interim progress of this Pilot Project in a July 1, 2004 report.

The IRP members identified the imbalance of jobs and housing between the Central Valley and ABAG counties as a problem that was jeopardizing the future of the communities that they represented. The elected officials that created the IRP, posited that reducing this imbalance could improve a number of problems that had arisen in these regions, including:

- The high cost of housing in the Bay Area and the resulting pressure on Central Valley communities to provide affordable alternatives.
- A dearth of high-paying jobs in the housing-rich Central Valley.
- High numbers of people commuting between the Central Valley and the Bay Area.
- Degradation of air quality as a result of automobile emissions.
- Stress and loss of quality of life as a result of long commute times and high congestion on the regions' freeways.
- Loss of open space and prime agricultural land.
- Insufficient or inefficient transportation facilities between housing and jobs centers.[154]

Methodology

The ABAG-Central Valley IRP developed an integrated GIS with thirteen data layers, including general plan, brownfields, environmental and habitat information, and urbanized areas. Each layer of information was collected from local jurisdictions, counties, COGs and other sources, i.e., State and/or federal agencies.

The creation of the IRP GIS has resulted in benefits for the COGs and the public at large, including:

- Providing the foundation for an inter-regional system of data that could be used to analyze development trends and create a bi-regional jobs-housing and economic development strategy.

[154] Western Riverside and Orange County, *Inter-Regional Partnership, Final Report*, Pg. 3.

- Requiring ABAG, STANCOG and SJCOG to begin looking at the types of data they have available and develop mechanisms for sharing that data.
- Providing the public with a useful tool to understanding the development trends taking place in their region.

Despite these generally positive results, there are three aspects of the GIS developed for the Pilot Project that could be improved:

- Level of data detail
- Geographies for data analysis
- Use of GIS criteria

To create the GIS, data was collected from local jurisdictions, participating COGs and state sources. The smallest level at which data was available was the Census tract. This meant that the GIS could not be used to track progress in the Opportunity Zones because available data was not sufficiently detailed to provide information at the Opportunity Zone scale because the zones were smaller than census tracts or covered portions of more than one tract.

In addition, GIS data is not readily available in smaller measurement units in general, nor is it readily available as a general resource. Development of a GIS database that reflects jobs-housing imbalances and other resource issues can be time and resource consuming.

Opportunity Zones

The IRP State Pilot Project was created in the hope that changes in development patterns in designated areas would encourage a shift in jobs-housing imbalances. A series of incentives were sought to prompt more housing construction in the jobs-rich Bay Area and more job creation in the housing-rich Central Valley and eastern Contra Costa County. These incentive requests were linked directly to the development of the Opportunity Zones.

Ultimately, progress will be measured by the movement of the ideal jobs-to-housing ratio of 1.5 for cities and counties in these two regions. In the process of testing the jobs-housing balance policy strategy, the IRP State Pilot Project created ten Opportunity Zones (listed in the first table on page 147) that have the potential to generate benefits on jobs-housing balance. It is important to note here that if these sites are built out they will make some progress towards creating jurisdictional jobs-housing balance. They may also have the ability to make a small shift in the regional patterns of development. Although such marginal shifts are not large enough to accomplish the goals outlined by the IRP, they do provide models for other communities exploring ways to improve development and commute patterns.[155]

[155]Western Riverside and Orange County, *Inter-Regional Partnership, Final Report*, Pg. 22.

JOBS-HOUSING OPPORTUNITY ZONES[156]

Jurisdiction	Opportunity Zone	County	Zone Focus
County of San Joaquin	Airport East	San Joaquin	Jobs
City of Tracy	Tracy Gateway Business Park	San Joaquin	Jobs
City of Modesto	Kansas Avenue Business Park	Stanislaus	Jobs
County of Stanislaus	Patterson Business Park	Stanislaus	Jobs
Cities of Antioch and Oakley	Antioch-Oakley	Contra Costa	Jobs
Cities of Antioch & Brentwood			
City of Milpitas	Milpitas Housing	Santa Clara	Jobs-Housing
County of Alameda	San Lorenzo Village	Alameda	Jobs-Housing
County of Alameda	Dublin Transit Center/Mixed Use Zone	Alameda	Jobs-Housing
City of Union City	Union City Inter-modal Station Area	Alameda	Jobs-Housing

POPULATION

	2000	2005	2010	2015	2020	2025	2030
Alameda	1,443,741	1,517,100	1,584,500	1,645,800	1,714,500	1,796,300	1,884,600
Contra Costa	948,816	1,016,300	1,055,600	1,102,300	1,150,900	1,200,500	1,232,600
Santa Clara	1,682,585	1,750,100	1,855,500	1,959,100	2,073,300	2,165,800	2,267,100
San Joaquin	563,598	630,613	708,364	792,998	888,536	995,132	1,117,006
Stanislaus	446,997	504,820	567,645	630,115	693,600	758,144	821,963
Total	**5,085,737**	**5,418,933**	**5,771,609**	**6,130,313**	**6,520,836**	**6,915,876**	**7,323,269**

Preliminary Assessment Strategy

The firm of DC&E was contracted to evaluate the performance of the IRP and to look at ways to improve the jobs-housing balance in the participating counties in this interim report. DC&E tackled the question of whether jobs-housing balance is the right regional problem to address in order to solve the underlying problems the IRP was created to address, and explored the potential impact the Opportunity Zones might have on the five-county area if full development of these targeted development areas is attained. Recommendations for improving the Pilot Project and for future IRP strategies were presented in a report prepared by DC&E.
The effectiveness of the job-housing program, if successful, will result in reduced daily car trips. Research indicates that job-rich areas face many more hurdles to providing housing than

[156] Western Riverside and Orange Count, *Inter-Regional Partnership, Final Report*, Pg. 4.

do housing-rich areas in providing jobs. While there are many market incentives for economic development and job creation, housing is costly and often fiscally unattractive for jurisdictions.[157] Historically, developers have created the housing opportunities and then the jobs have followed. An insightful jobs-housing balance plan will look for strategies to reverse this trend for a more even growth pattern. Research and trends indicate that jobs-housing balance is a necessary but insufficient condition of smart growth. Providing housing near jobs provides people with the choice of living close to work. Reducing the length of the work trip reduces the time spent commuting and may provide the option to use other modes of transportation. However, the evaluators concluded that given the many factors involved in housing and commuting choices, and the increasingly complex nature of urban areas it is unlikely that jobs-housing balance alone is sufficient to effect the changes desired by the IRP.[158] The available research indicates that creating a jobs-housing balance may be ineffective without other inducements to live closer to work, such as more amenities, lower cost housing and increasing the cost of commuting.[159]

Jobs-Housing Gaps

Jobs-housing balance efforts require focus, not only on the creation of a numerical balance between jobs and housing, but also on a match between the salaries of local jobs and the availability of appropriately priced housing to serve workers who fill those jobs. [160]

While a jobs-housing balance strategy alone appears insufficient to achieve IRP goals, pursuing the strategy has had benefits. Theories about jobs-housing balance have been a significant part of urban planning research over the last decade. Only a handful of regions, however, have implemented programs to test the theories. While it appears now that policies designed to encourage jobs-housing balance are not as effective as was hoped, it is important that they have been tested.

Ratio Comparison

DC&E developed the following table to show the projected impacts on the jobs-housing relationships as their affect relates to the five counties and their Opportunity Zones. As of the 2000 data, only one county in five exceeds a ratio 1.50. DC&E estimates this will increase to three out of the five by the year 2025.

[157] Western Riverside and Orange County, *Inter-Regional Partnership, Final Report*, Pg. 50.
[158] Ibid, Pg. 16.
[159] Ibid, Pg. 16.
[160] Ibid, Pg. vi.

PROJECTED IMPACTS ON JOBS-TO-HOUSING RATIOS [161]

	County Projection 2000	County Projection 2025	Estimated Projection w/o Opportunity Zones 2025	Change
Alameda	1.44	1.60	1.67	0.07
Santa Clara	1.93	1.93	2.01	0.07
Jobs-Rich Sub Total	**1.69**	**1.78**	**1.85**	**0.07**
Contra Costa	1.05	1.14	1.07	0.07
San Joaquin	1.03	0.84	0.71	0.13
Stanislaus	1.20	1.12	1.06	0.06
Housing-Rich Sub Total	**1.11**	**0.96**	**0.90**	**0.06**

Effects of Population, Housing, and Job Growth

Future IRP-enabling legislation should include a longer time frame for measuring success. Future Opportunity Zone selection criteria ought to include a requirement that proposed projects in housing-rich areas have a preponderance of jobs (e.g., at least 80 percent), and that projects in job-rich areas have a large preponderance of housing (e.g., at least 80 percent). This evaluation should be made based on the jobs-housing balance data of the project sub-regions (i.e., jobs-housing ratio for the county or census tracts within a 30 minute driving radius), as opposed to its city or county.[162]

REALLOCATION OF JOBS AND HOUSING WITHOUT OPPORTUNITY ZONE DEVELOPMENT

	Dwelling Units		Jobs	
	Proposed Opportunity Zone Development	Reallocated Development without OZ	Proposed Opportunity Zone Development	Reallocated Development without OZ
Alameda	3,307	-3,307	10,197	36,643
Santa Clara	4,860	-4,860	2,418	43,198
Jobs-Rich Sub Total	**8,167**	**-8,167**	**12,615**	**79,841**
Contra Costa	184	2,493	28,835	-28,835
San Joaquin	0	3,328	39,506	-39,506
Stanislaus	0	2,346	11,500	-11,500
Housing-Rich Sub Total	**184**	**8,167**	**79,841**	**-79,841**

[161] Western Riverside and Orange County, *Inter-Regional Partnership, Final Report*, Pg. 30.
[162] Ibid, Pg. 58.

The analysis shown in the second table on page 149, assumes that all of the new jobs located in the ABAG Opportunity Zones shifted from other locations within the same county. Jobs in Central Valley Opportunity Zones are assumed to have moved from ABAG locations.

Analysis of jobs-housing balance and its implications is a long term prospect. The ABAG - Central Valley IRP plans to continue its work over several more years, as indicated by the legislative extension granted to the Bay Area Valley program. Recognizing that jobs-housing balance has a limited impact on overall development patterns, it is important to note that the regions in this particular study will have ongoing concerns as a result of the regional and inter-regional implications.

Constraints and Opportunities Affecting Jobs Housing Balance (External Factors)

While there are many market incentives for economic development and job creation, new housing is costly, fiscally unattractive for jurisdictions and is often perceived by existing residents as reducing the quality of life in their community. Zoning policies often discourage a range of housing types, particularly multi-family units, and add to the cost of construction. Higher costs are then passed on to consumers. Subsidized housing projects suffer the worst from restrictive zoning policies. Statewide tax policies discourage the construction of housing because local jurisdictions can raise significantly higher revenues from non-residential uses such as retail establishments. [163]

Because of the political problems inherent in developing new housing in job-rich areas and the market's natural tendency to provide jobs in housing-rich areas over time, future IRP efforts should emphasize the provision of housing in job-rich areas. Some on-going programs can also emphasize job-creation in housing-rich areas, but the primary focus should be on housing in jobs-rich areas.[164]

Many studies in recent years have acknowledged the importance of a mix of uses in supporting the economic and social vitality of a city. Each type of land-use attracts people at different times of the day and night. When uses are separated in conventional subdivisions and commercial districts, activity only takes place during certain times of the day, leaving stretches of time when streets and other public places are empty. Mixing uses provides a 24-hour environment where there are always some people coming and going. This activity provides a liveliness and security that single-use districts lack. Bringing residents closer to commercial uses also provides a ready market for retailers that contribute to the economic vitality of an area.[165]

[163] Western Riverside and Orange County, *Inter-Regional Partnership, Final Report*, Pg. 18.
[164] Ibid, Pg. 56.
[165] Ibid, Pg. 15.

Long-Term Strategy

AB 2864 defined the four tasks that pilot project was to address. With the absence of State incentives in the Opportunity Zones, the ability to attract employers has been somewhat hampered. However, the successful completion of the required steps has had other benefits such as increasing local officials' awareness of regional planning and the potential benefits of an improved jobs-housing balance. DC&E recommends that "the IRP may want to consider setting aside specific resources to educate city staff and elected officials about the benefits of the Pilot Project and engage them in on-going discussions about the regional issues of concern to the program."[166]

Internal Evaluation of Strategies

As a part of their review, DC&E highlighted the following two evaluation points to enhance or improve the pilot project:

- New criteria should be considered that would allow a jurisdiction to submit a proposal for an Opportunity Zone made up of several non-contiguous parcels within an urbanized area or located within a specified distance from transit facilities.
- Density criteria for both jobs and housing should also be considered.[167]

Interim Internal Assessment of Outcomes

It is much more likely that, though some of the jobs proposed for the Central Valley Opportunity Zones would locate in the Bay Area without the influence of the Opportunity Zones, many of the jobs proposed for the Opportunity Zones would have been created in other jurisdictions in the Central Valley or would not have been created at all. It is also unlikely that all of the housing proposed in the Bay Area Opportunity Zones would be built in the Central Valley without the Opportunity Zones. [168]Therefore, the most likely result is that some percentage of the jobs and housing now proposed for the Opportunity Zones would shift regions, as a result of the Pilot Project. As a result, movement in the jobs-to-housing ratio (as shown in the second table on page 149) would be smaller than is projected using these extreme assumptions. [169]

Though this analysis gives an outward bound for the potential of the IRP State Pilot Project to shift jobs-to-housing ratios, the incremental improvements shown by using these drastic assumptions (as noted in Table 6) indicates that Opportunity Zones have some potential to shift development patterns but that they are not sufficiently large enough to have a significant effect on a regional scale. [170]

[166] Western Riverside and Orange Count, *Inter-Regional Partnership, Final Report*, Pg. 54.
[167] Ibid, Pg. 58
[168] Ibid, Pg. 31.
[169] Ibid, Pg. 31.
[170] Ibid, Pg. 31.

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APPENDIX A1

AUTHORIZING LEGISLATION FOR THE INTER-REGIONAL PARTNERSHIP PROGRAM

Appendix A1

Authorizing Legislation for the Inter-Regional Partnership Program

Chapter 52, Section 2240-112-0001, Provision 1, of the Statutes of 2000

Of the funds transferred by this item, $5,000,000 shall be distributed for collaborative work by a county in partnership with the state and federal governments, two or more councils of governments, and/or two or more subregions within a multicounty council of governments, to mitigate interregional impacts of substantial imbalances of jobs and housing. Except as provided by Article 2.10 (commencing with Section 65891) of Chapter 4 of Division 1 of Title 7 of the Government Code, as proposed by Assembly Bill 2054 of the 1999-2000 Regular Session, if enacted. These funds shall be (1) used for advancing development of implementation plans and models, including, but not limited to, geographic mapping, targeted policies and incentives, and/or integrated planning approaches connecting housing, transportation, and environmental issues, to promote and accommodate housing development in areas rich in jobs, and job development in areas rich in housing; (2) subject to a local match of not less than 25 percent for each application, which may be satisfied with in-kind contributions; (3) awarded to qualifying applicants that are geographically dispersed within the state to the extent practical, including representation from at least the three largest major metropolitan areas of the state. Up to $625,000 of the funds transferred by this item shall be made available to a partnership of the Association of Bay Area Governments, the San Joaquin Council of Governments, and the Stanislaus Council of Governments to be used for planning for Alameda, Contra Costa, Santa Clara, San Joaquin, and Stanislaus Counties, and cities therein. The Department of Housing and Community Development shall report to the Legislature on its evaluation of this pilot project by January 1, 2004. Products of each project shall be provided to the department for evaluation and use in development of a statewide inventory. The department may use up to 10 percent of the amount appropriated for the purposes of this provision for coordinating efforts among grantees, developing the inventory, program administration, and evaluation and preparation of the report. Funds transferred by this item for program administration shall be available through June 30, 2004.

APPENDIX A2

ENABLING LEGISLATION FOR THE ABAG – SJCOG – STANCOG INTER-REGIONAL PARTNERSHIP

Appendix A2

Enabling Legislation for the ABAG – SJCOG – STANCOG Inter-Regional Partnership

Chapter 665, Statues of 2000

SECTION 65891-65891.12

65891. This article may be cited and shall be known as the Inter-Regional Partnership (IRP) State Pilot Project to Improve the Balance of Jobs and Housing.

65891.1. For the purposes of this article, the following terms have the following meanings:

(a) "Inter-Regional Partnership" or "IRP" means an organization of elected officials from the Counties of Alameda, Contra Costa, Santa Clara, San Joaquin, and Stanislaus and a number of cities therein, that was formed under the sponsorship of the three regional councils of government, the Association of Bay Area Governments (ABAG), the San Joaquin Council of Governments, and the Stanislaus Council of Governments, that oversee regional land use and transportation planning for the five counties.

(b) "Incentives" include, subject to negotiations with appropriate state and local agencies, the following:

(1) Providing tax credit priority for development of multifamily residential construction in areas with job surpluses and for job generating projects in areas with housing surpluses.

(2) Providing a return of property tax for development of affordable housing in areas with job surpluses and for job generating projects in areas with housing surpluses.

(3) Pooling of redevelopment funds.

(4) Tax-increment financing for jobs-housing opportunity zones based on the redevelopment model.

(c) "Jobs-housing opportunity zone" means a zone selected by the IRP State Pilot Project for the purpose of mitigating current and future imbalances of jobs and housing in the Counties of Alameda, Contra Costa, Santa Clara, San Joaquin, and Stanislaus that has the following characteristics:

(1) Is no smaller than 50 acres and no larger than 500 acres.

(2) Contains significant portions of land that are vacant, underutilized, and suitable for urban use.

(3) Is created for the purpose of either providing needed workforce housing if there is a surplus of jobs or providing jobs for the area's workers if there is a surplus of housing.

(4) Is eligible to receive incentives, subject to negotiation with appropriate resource agencies.

(5) Is serviced by adequate infrastructure and transit service, or has commitments to provide adequate infrastructure and transit service, to support significant proposed development.

(6) Is intended to support development that will improve the jobs-housing imbalance across the five-county IRP area.

65891.2. It is the intent of the Legislature to establish the Inter-Regional Partnership (IRP) as a state-supported pilot project to test and evaluate a variety of policies and incentives designed to mitigate current and future imbalances of jobs and housing in the Counties of Alameda, Contra Costa, Santa Clara, San Joaquin, and Stanislaus.

65891.3. The Legislature finds and declares all of the following:

(a) California will experience significant population growth in the coming decades. In the San Francisco Bay Area, one million new residents are forecast by the year 2020. An equal number of new jobs are expected during the same time period. However, less than 500,000 new housing units are expected to be built in an already costly and competitive housing market.

(b) Under the current land use and policy framework, central valley communities expect to double or triple in size, but most of them will not attract equivalent numbers of new jobs. Instead, thousands of central valley residents are expected to commute far into the bay area, often driving two hours or more each way. The challenges to transportation, air quality, and social quality of life are enormous. Projections estimate the current number of less than 100,000 daily Altamont Pass commuters will more than double to 250,000 by the year 2020.

(c) These growth-related issues cut across county and regional boundaries. The Inter-Regional Partnership is intended to provide a forum for neighboring jurisdictions governed by different regional councils of government to deal collaboratively with land use, transportation, and air quality issues that affect a five county region, while also complementing existing collaborative regional organizations, including, but not limited to, the Bay Area Alliance for Sustainable Development, the Bay Area Council, the Silicon Valley Manufacturing Group, the Great Valley Center, and others, in order to support optimal intra-regional accountability for growth.

(d) The IRP State Pilot Project will stand as an important example for other regions in the state in dealing with multijurisdictional problem solving and addressing land use planning across metropolitan borders.

(e) The need for communication and cooperation among these jurisdictions is underscored by the fact that Alameda County recently sued the City of Tracy in San Joaquin County concerning the environmental impacts of a planned housing development on the Western edge of the county where a majority of residents would be assumed to commute into the San Francisco Bay Area through Alameda County.

(f) These interjurisdictional planning issues are not unique to the IRP's five county area; several other expanding metropolitan areas in California are beginning to experience similar problems. However, the geographic imbalance in housing and job growth in the IRP area is among the country's most extreme examples, and, driven by continued employment growth in the Silicon Valley, is predicted to worsen significantly in the coming years.

(g) The housing market in the Silicon Valley is now the most expensive in the nation. Land being developed for housing in the San Joaquin Valley is some of the highest quality agricultural land in the world.

(h) The IRP area is the best place in the state, and probably one of the best in the country, to implement a pilot program designed to mitigate the myriad of problems associated with unbalanced and uncoordinated growth.
(i) By implementing this pilot program, the state will play an important role in creating a more sustainable future pattern of land use in the IRP area.
(j) Active investment of state resources to balance job growth and housing growth will reduce the need for costly transportation infrastructure investments in the future.
(k) The current path of land development in the five county area will have very costly transportation and environmental impacts if efforts are not made soon to link job growth to housing production.

65891.4.

(a) The Inter-Regional Partnership (IRP) State Pilot Project to Improve the Balance of Jobs and Housing is hereby established.
(b) The Department of Housing and Community Development shall be the state agency responsible for monitoring the IRP State Pilot Project.
(c) The pilot project shall consist of two phases: (1) research and development, as specified in Section **65891.5**, and (2) implementation, as specified in Section **65891**.**7**.

65891.5.

(a) During the first year after the date that funding is received, the IRP shall complete all the necessary research, outreach, and negotiation to allow the successful establishment of jobs-housing opportunity zones throughout the five IRP counties. The IRP shall collaborate with local governments and existing regional and subregional organizations committed to improving inter-regional jobs-housing balance. During this phase, a series of outreach meetings shall be held with local jurisdictions and the public to review and comment on the data and make recommendations for locations of jobs-housing opportunity zones. Public input and participation shall be encouraged throughout phase one of the IRP pilot project. Local jurisdictions wishing to participate in the pilot project shall enter into agreements with the IRP to pursue the regional goals and objectives of opportunity zones within their jurisdictions.
(b) The first phase shall provide all of the following:
(1) An integrated GIS designed, where feasible, to be compatible with existing regional GIS systems. The IRP's GIS system shall enable easy comparison of data on land use and transportation trends and alternative scenarios across the five county areas. The GIS mapping shall focus on obtaining existing data from a variety of sources, including, but not limited to, the Bay Area Regional Livability Footprint Project that integrates land use with transportation, housing, job, economic, social equity, and environmental overlays, and integrating them into a single system to allow accurate analysis and scenario work on an interregional scale. The Legislature finds and declares that the IRP's GIS system will be a crucial tool for use in determining the location of proposed jobs-housing opportunity zones.

(2) General types of data to be assembled in the GIS system shall include:

(a) Demographic data, including population and employment by census tract.

(b) Projected growth data consisting of information on where growth, including jobs generation and new housing location, is predicted to occur over a 20-year period.

(c) Transportation information such as traffic capacity and usage, transit access and usage, and journey- to-work data.

(d) Land use information, including general plan layers and zoning designations. It is the intent of the Legislature that to reduce costs and setup time, the IRP's GIS undertaking shall not include parcel-level data.

(e) Basic environmental data, including floodplains, slopes, contamination, prime soils, open space, and important natural resources both inside and outside of urbanized areas.

(3) A refined description of the incentive program for application to the jobs-housing opportunity zones within the IRP counties. This list shall include thorough descriptions of fiscal and nonfiscal policy and regulatory incentives. A variety of state departments shall be involved in determining what incentives might be made available, including, but not limited to, the Office of Planning and Research, the Department of Housing and Community Development, the California Housing Finance Agency, the Department of Transportation, and the Department of Conservation.

(4) Recommendations for establishing five to 10 official Inter-Regional Partnership Jobs-Housing Opportunity Zones located throughout the five county area. Using the GIS system and conferring with interested regional organizations and with local jurisdictions, the IRP shall propose a series of jobs-housing opportunity zones. Each zone shall have specific goals and a description of the type of action desired to attain these goals, including recommended state sponsored incentives intended to encourage the desired results. The types of incentives requested may vary by zone location and type. Zones located near, or with good transit access to, existing major employment centers may receive incentives designed to promote reasonably priced housing development. Zones located far from existing employment centers, but near, or with good transit access to, significant work force housing supply, may receive incentives designed to promote employment development. Adoption of land use policies that protect agriculture and natural resources and promote compact, higher density, mixed use, transit-oriented development may be required as selection criteria for jobs-housing opportunity zones.

65891.7.

(a) During the second phase of the pilot project, opportunity zones shall be established. Negotiation between the state, the IRP, and local jurisdictions shall result in formal agreements to implement specific jobs-housing opportunity zones.

(b) Results of the second phase shall include:

(1) Final selection of not less than 5 nor more than 10 official IRP Jobs-Housing Opportunity Zones that shall be equitably distributed among each of the five IRP counties.
(2) Reports that include results of GIS analysis and clearly illustrate the benefits of prescribed developments toward creating an interregional jobs-housing balance. Desired outcomes and actions for each zone shall be included in the report.
(3) The IRP shall enter into a memorandum of understanding with each jurisdiction having one or more of the selected zones for the pilot program and with appropriate state agencies outlining outcomes and incentives to be awarded for stated outcomes.

65891.8

(a) The goals of the IRP and the pilot project are to
(1) Encourage economic investment, including job creation, near available housing
(2) Encourage housing to be located near major employment centers.
(3) Encourage development along corridors served by transit and near transit stations.
(4) Encourage more sustainable and effective transportation between job and housing centers.

(b) The IRP shall contract with a qualified consultant to conduct an evaluation of the pilot project. Ongoing monitoring and evaluation shall be conducted throughout the implementation of phases one and two. After zones have been selected and projects begin on each of the zones, the progress of each project shall be evaluated. The evaluation shall assess the gap between jobs and housing by comparing the ratio between the number of jobs and the number of housing units in a local jurisdiction with a designated IRP Jobs-Housing Opportunity Zone, before an opportunity zone project has been approved and after it has been completed. The comparison shall be based on an optimum balance of jobs and housing being one and one-half jobs for one housing unit, as determined by the Department of Finance. The following data shall be used in determining that a jobs-housing balance has been mitigated in a jurisdiction:
(1) The number of building permits issued as provided by the California Industrial Research Bureau.
(2) The number of jobs generated, as determined by the Employment Development Department.
(c) An interim report shall be submitted by the IRP to the Department of Housing and Community Development on or before July 31, 2004. A final report shall be submitted by the IRP to the department on or before July 31, 2008.

65891.9. Funding for the IRP State Pilot Project shall be provided in the 2000-01 Budget Act. The IRP State Pilot Project shall begin on January 1, 2001.

65891.10. No local jurisdiction shall be required to participate in the pilot project. This article shall have no fiscal impact on any local jurisdiction.

65891.11. The department may administer the programs set forth in this article, and the funds transferred by Item 2240-112-0001 of the Budget Act of 2000 to the Housing Rehabilitation Loan Fund established by Section 50661 of the Health and Safety **Code**, pursuant to guidelines that shall not be subject to the requirements of Chapter 3.5 (commencing with Section 11340) of Division 3 of Title 2.

65891.12. This article shall become inoperative on July 31, 2008, and, as of January 1, 2009, is repealed, unless a later enacted statute that is enacted before January 1, 2009, deletes or extends the dates on which it becomes inoperative and is repealed.

APPENDIX B

L.A. LOTS:
LAND OPPORTUNITY TRACKING

FUNCTIONAL OVERVIEW

L.A. LOTS
Land Opportunities Tracking System

LA LOTS - OBJECTIVE

LA LOTS is developed to serve as a comprehensive information portal for land/development analysis within the LA County. The interactive web-portal provides a platform for users to query as well as to pinpoint opportunities for infill development. Users can now access and utilize this information to analyze and compare investments in neighborhoods--both public and private--throughout the entire county.

LA LOTS – WHAT IT OFFERS?

- Scan data at different geographic levels such as census tract, census zipcode, and countywide.
- Identify focus areas, such as transit stops, and get aggregated data at census tract level.
- Analyze neighborhood and community characteristics.
- Research property level data.

WHY LA LOTS?

- Provides comprehensive and timely information.
- Provides information that can be easily queried, through intuitive and easy to use interfaces.
- Provides online mapping technologies (geographic information systems) that allows users to perform spatial analyses and better research the focus areas for planning needed housing, shopping, parks, schools, and other resources.

http://lots.ucla.edu

SITE OVERVIEW

L.A. LOTS
Land Opportunities Tracking System

RESOURCES

The resources section provides access to informative materials such as case-studies, new smart growth initiatives adopted by the City of LA, presentations, and links to web resource. Users can find the latest on policies and practice for infill development.

TRANSIT STATIONS

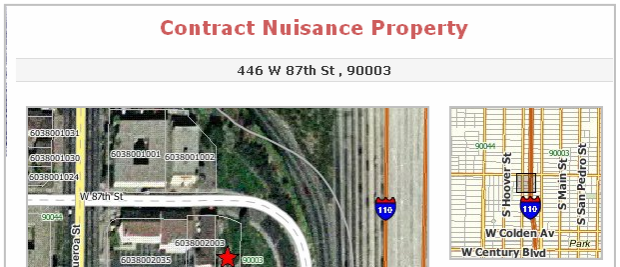
This section focuses on transit stations and a 1/3rd of a mile radius around it. Users can get aggregated contextual information by census tracts for most of the data variables available on the site. The aerial and land use base help identify development potential in the region.

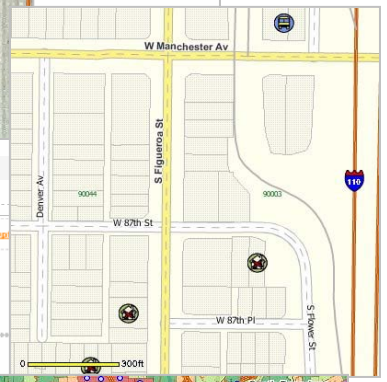
DATA AND CHARTS

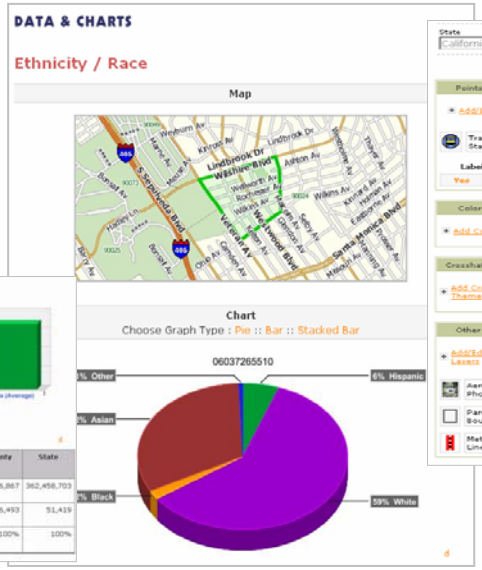
The Data and Charts section provides easy access to contextual data with comparisons at the county & state level.

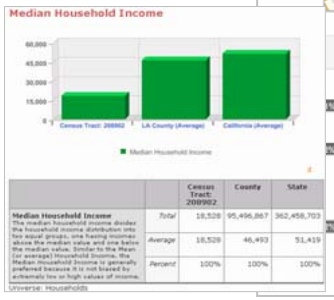
MAPROOM

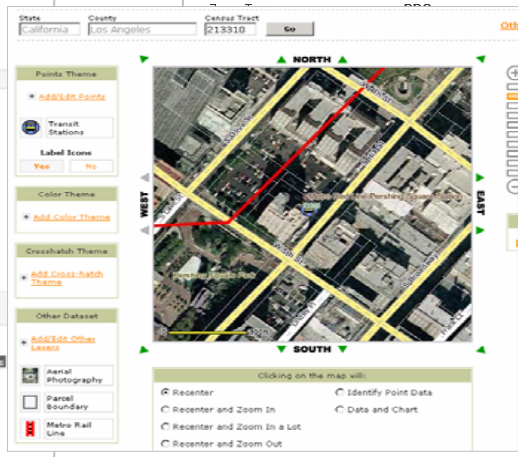
- **Interactive mapping:** zoom in and focus to your area of interest
- **Aerial maps:** see an aerial photographic view of a neighborhood
- **Thematic mapping**: view colorful maps displaying areas of high and low concentrations of an indicator you choose
- **Map points of interest:** map location of transit stops, brownfields and contract nuisance properties

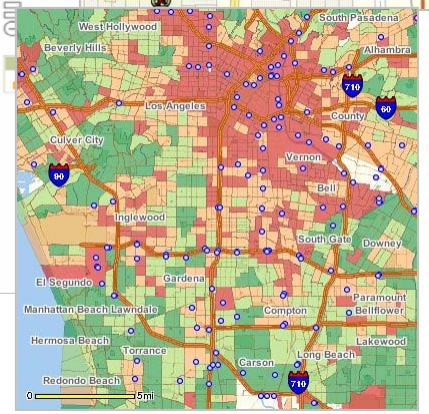












http://lots.ucla.edu

APPENDIX C

SMART GROWTH HOUSING INITIATIVES
CITY OF LOS ANGELES

CITY OF LOS ANGELES
SMART GROWTH HOUSING INITIATIVES

1. DENSITY BONUS

The state enacted a law several years ago requiring cities to grant a minimum 25% additional density for housing projects that set aside 10-20% of the units for affordable housing (depending on the rent level or sale price of the units). Seeing few developers take advantage of this law, the City adopted its own ordinance to increase the incentive. Under the new law, the affordable set aside percentage remains the same, but developers can add 35% more market rate units than otherwise allowed under the zoning for projects that are located close to rail or bus stops (a 10% increase above the State law). The additional density is allowed by-right, meaning there are no hearings and no discretionary actions. Since adoption of the ordinance we have seen a 37% increase in these types of projects, and in the first fourteen months, they have generated more than 700 units in all parts of our city that are affordable to people with low and very low incomes. And these units are mixed imperceptibly within market rate projects in Brentwood and Sherman Oaks, as well as Pico Union and South LA.

2. ADAPTIVE REUSE ORDINANCE

In 1999, the City adopted an ordinance to facilitate the conversion of old, abandoned downtown office buildings into housing. That ordinance made it possible to convert many beautif l, historic buildings into apartments and condominiums by waiving modern zoning requirements that were difficult to apply to historic buildings. The ordinance assures that new units are safe, without sacrificing the extraordinary architecture of Los Angeles' historic buildings. Although a new phenomenon in Los Angeles, adaptive reuse projects are being well received in the market and thousands more are in development. The adaptive reuse ordinance has now been expanded to Hollywood, Koreatown, Chinatown, and other areas and a modified version has been adopted that applies citywide.

3. RAS

Two new zones were created in January, 2003 to encourage mixed use development (housing and commercial) along underutilized commercial and transportation corridors. The zones, Residential Accessory Services zones (RAS), provide increased floor area and height and reduced setbacks for 100% residential or mixed use projects constructed on commercial corridors. The two zones differ only in the number of units permitted: RAS3 permits 54 units per acre; RAS4 permits 108 units per acre. It is anticipated that RAS projects will help transform the city's underperforming transit corridors into beautiful boulevards, while improving mobility, reducing traffic, and upgrading neighborhoods.

4. TRANSIT ORIENTED DEVELOPMENT

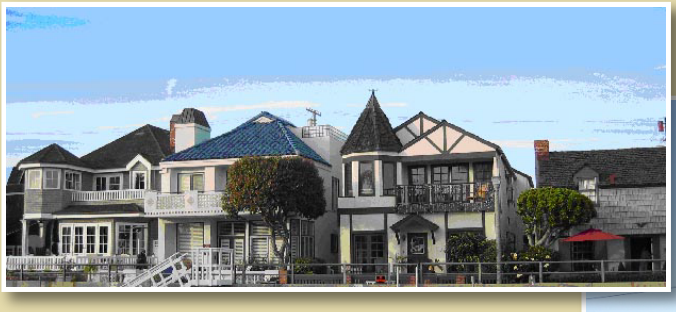
As rail lines are added to the city's transportation system, areas around station stops have the potential to become unique mixed-use neighborhoods that appeal to individuals and families who see transit as an asset. The city has adopted several "Transit-Oriented District" plans, which increase density, reduce parking requirements, and establish design and development standards to create inviting, mixed-use urban neighborhoods, such as Avenue 57 in Highland Park and around the Vermont Avenue red line stops in Hollywood.

5. LIVE/WORK

Industrial warehouses can be suitable for housing, yet zoning codes have traditionally precluded housing in industrial zones. By adopting an ordinance several years ago that permitted such housing, the city paved the way for the conversion of interesting, large industrial spaces that have now spread from the fringes of downtown to Venice, North Hollywood, and other parts of the city. Warehouse conversions are transforming neighborhoods, creating new housing, and adding to the city's tax base.

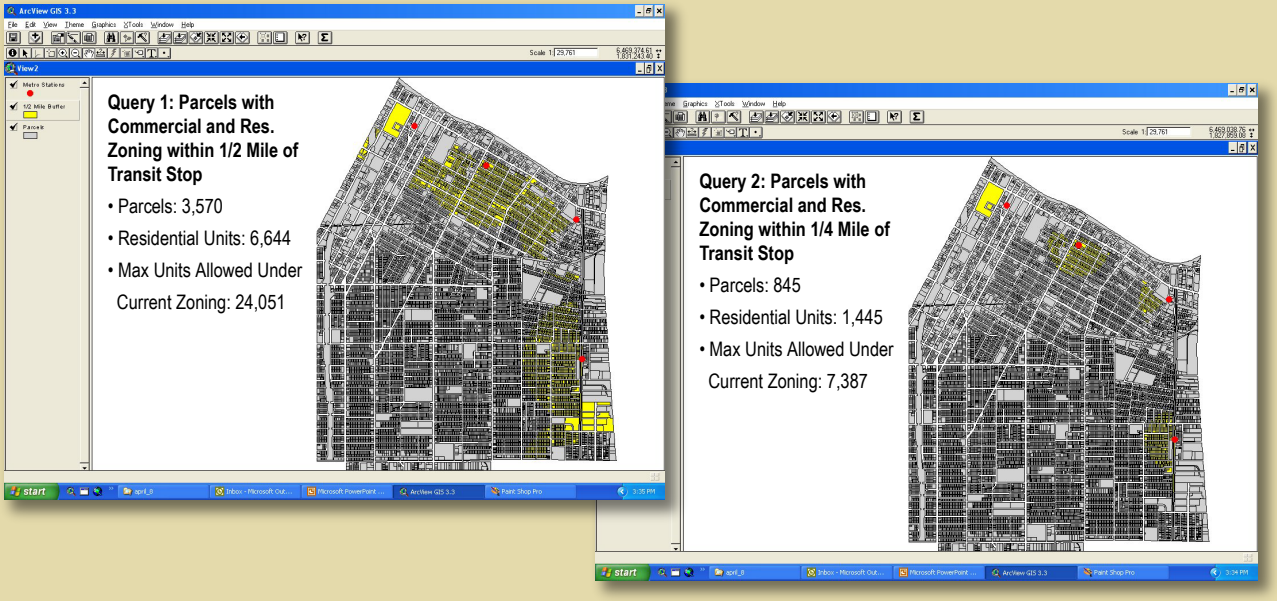
6. TOWNHOME ORDINANCE

A new ordinance is under consideration to permit small lot, fee-simple ownership opportunities in multi-family neighborhoods. The new law will provide an entirely new housing option, allowing people to purchase a house and the lot it sits on, just like they do in a single family neighborhood, rather than a unit in a condominium. The ordinance will allow properties zoned for multi-family residential use to be subdivided into much smaller lots than is required today, while complying with the density requirements established by both the zoning and the General Plan, in order to reduce the cost of home ownership and to generate creative housing solutions, such as modern versions of bungalow courts, courtyard housing and row houses. Pilot projects of such small lot subdivisions are already being proposed on multi-family zoned lots in the Marina and in Van Nuys.



7. INFILL HOUSING EVALUATION TOOL

With a $300,000 grant from the California Department of Transportation, the City of Los Angeles, L.A. County, and a team of consultants are developing an innovative GIS-based infill housing tool. The tool provides a way for policy makers, developers and neighborhood residents to identify and map infill development sites and to quantify the net new housing that could be produced on them. It can be used to identify certain geographies (i.e. all parcels within 1⁄4 mile of transit), and to test infill strategies (i.e. what if we provided a density bonus for converting obsolete shopping centers into housing?). The GIS system can map eligible parcels at a parcel level, neighborhood level, or regional level, quantify the current number of units on the parcels, and calculate the net new number of units the strategy could yield. The infill tool uses off-the-shelf technology and free and easily available data. It will be a powerful tool to help cities find and develop politically and economically viable infill sites.



8. HOUSING TRUST FUND

The City created a $100 million housing trust fund to provide funding for affordable housing projects. The Trust Fund further assists projects that have received other public funding, leveraging public resources for projects that might otherwise not be built. This investment has been responsible for more than 1,000 units of affordable housing built over the last year and a half.

Funding for this report provided by:
Inter-Regional Partnership for Jobs Housing Balance Grant Program
State Housing and Community Development Department
Sacramento, CA

Prepared by City of Los Angeles Planning Department
Graphics Services Section • May, 2004

APPENDIX D

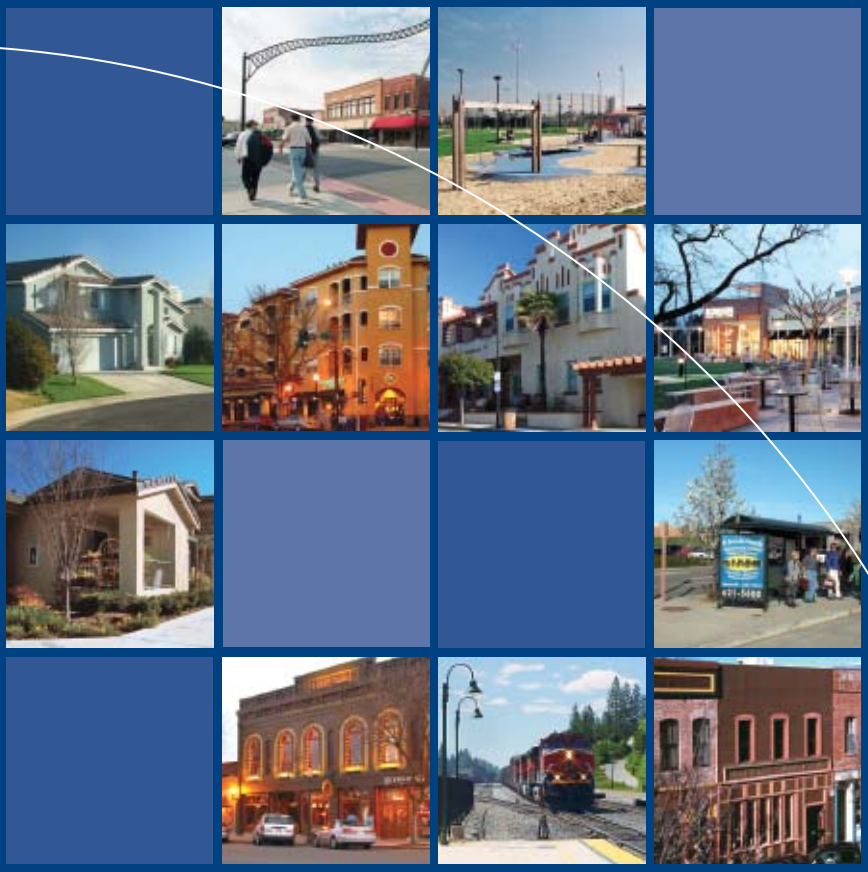
BETTER WAYS TO GROW: THE SEVEN PRINCIPALS OF SMART GROWTH, SACOG

Examples from the Sacramento Region of

THE SEVEN PRINCIPLES OF SMART GROWTH

Better Ways to Grow

SACOG










GIFTED PEARLS














WHAT IS

Smart Growth

Quality of life concerns are driving communities throughout the State of California and the nation to make growing smarter a top priority. Nowhere is this mission more important than in the six-county Sacramento Region, which is experiencing some of the fastest growth in the state. The region's political leaders—from Colfax to Isleton and Winters to Placerville—are working together under the umbrella of the Sacramento Area Council of Governments to address these concerns through the Sacramento Region Blueprint: Transportation/Land Use Study. This booklet is part of that effort, and provides some examples of what the region's communities can accomplish when they seek to grow smarter.

Smart growth. Good growth. Sustainable development. Whatever the terminology, the goals are the same: to preserve and enhance the quality of life for the region's citizens. Good growth does this by promoting a sense of community in new and expanding areas while protecting the integrity and vitality of existing communities—thereby strengthening the region as a whole.

Davis Commons. Placerville's Historic Downtown. Roseville's Sierra Crossings. Beermann's Beerwerks in Lincoln. These and the many other examples on the following pages show how the region's government leaders have implemented the following good growth concepts, widely accepted to encourage more livable communities:

- Provide a variety of **transportation choices**
- Offer **housing choices** and opportunities
- Take advantage of **compact development**
- Use **existing assets**
- **Mixed land uses**
- Preserve open space, farmland, natural beauty, through **natural resources conservation**
- Encourage distinctive, attractive communities with **quality design**

Every community in the Sacramento Region has examples of these good growth principles to share, and the examples included here are not meant to be comprehensive. But there is at least one from every jurisdiction. Those jurisdictions are to be commended for their foresight and creativity and encouraged as they work to grow smart in the future.

PRINCIPLE 1

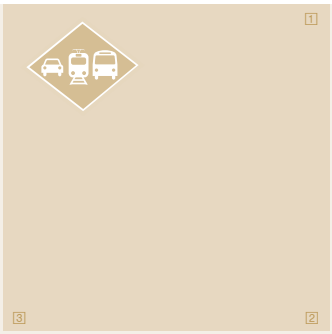
Transportation Choices

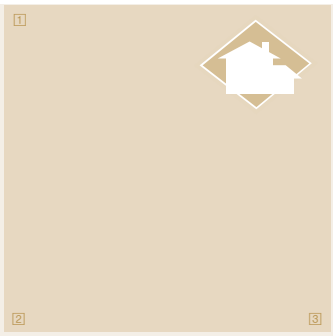
Community design can help encourage people to walk, ride bicycles, ride the bus, ride light rail, take the train or carpool. For example, streets can be designed to include dedicated bike lanes or special lanes for bus rapid transit. Community design can encourage people to make more trips closer to home, making walking or biking easier. As more people walk, bike, or ride the bus, congestion and air pollution are reduced.

1
El Dorado County
El Dorado Multimodal Transportation Facility
Residents can park their cars or bikes at the facility and commute via El Dorado Transit. Commuters can utilize shopping and services within walking distance of the facility.

2
City of Galt
Deadman Gulch Trail System
The popular trail system connects to three parks, one school, and multiple residential developments. The City of Galt has zoned more homes along the trail and plans to link it to a future commercial retail development.

3
City of Colfax
Multimodal Station
The City of Colfax is turning its historic Colfax Depot into a Multimodal Transportation Station by adding new parking, an automated ticket booth, and a passenger platform. Plans to renovate the building exterior and landscaping are in the works. Colfax is served daily by Amtrak passenger rail and by a feeder bus line that connects to the Capitol Corridor train.





PRINCIPLE 2

Housing Choices

Providing a variety of places where people can live—apartments, condominiums, townhouses, and single-family detached homes—creates opportunities for the variety of people who need them—families, singles, seniors, and people with special needs. This issue is of special concern for the very low-, low-, and moderate-income people for whom finding housing, especially housing close to work, is challenging. By providing a diversity of housing options, more people have a choice.

1
City of Loomis
Stonebridge
Stonebridge provides much-needed homes close to the center of Loomis. The petite-lot homes appeal to seniors, singles, and small families. The city was able to preserve a wetlands open space by requiring very small lots. Despite intial skepticism over whether the small lots would sell, the homes are very popular.

2
City of Citrus Heights
Normandy Park Apartments
Built for active seniors, Normandy Park is strategically connected to San Juan Park to give residents opportunities for recreation within walking distance.

3
City of Roseville
Sierra Crossings Development
This neighborhood offers affordable three- and four-bedroom homes, including 53 middle-income and six low-income units.

PRINCIPLE 3

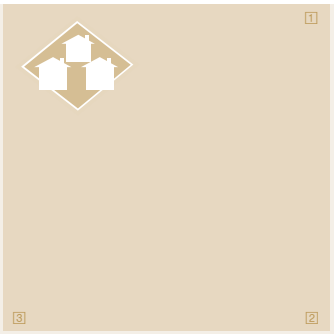
Compact Development

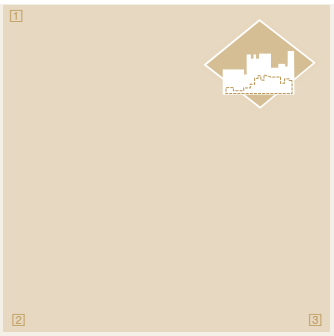
Creating environments that are more compactly built and use space in an efficient but more aesthetic manner can encourage more walking, biking, and public transit use.

1
City of West Sacramento
Metro Place
Metro Place's new townhomes are alluring because of the development's proximity to the River Walk, Downtown Sacramento, and Raley Field. Nine out of the 44 units are affordable and ten live-work loft units are scheduled.

2
City of Sacramento
Fremont Building
This landmark near the Capitol combines three levels of residential over retail commercial development. Kitty-corner from a park and located less than two blocks from light rail, the Fremont Building continues to be fully leased. Density is 77 units per acre.

3
City of Elk Grove
Laguna Pointe
Twenty percent of Laguna Pointe's homes are affordable. The units are built on petite lots, with small pedestrian-friendly streets, allowing for greater density. Lot sizes average 2,500 square feet and density is 10 units per acre.





PRINCIPLE 4

Use Existing Assets

Focusing development in communities with vacant land or intensifying development of underutilized land can make better use of public infrastructure, including roads. Building on existing assets can also mean refurbishing historic buildings or clustering buildings more densely in suburban office parks.

1
City of Placerville
Historic Downtown
Placerville has fought to preserve and maintain its Historic Main Street and, as a result, the district is vibrant and thriving. Many of its historic buildings house unique specialty shops, great restaurants, and a variety of service businesses.

2
City of Lincoln
Beermann's Beerwerks
Beermann's Beerwerks and Meat Market now occupies the Victorian building at 645 5th Street in downtown Lincoln after refurbishment of the historic site.

3
City of Winters
The Palms
Seaman's Opera House, built in 1876, is now known as The Palms. The refurbished concert hall is almost fully booked with all sorts of musical performances year round.

PRINCIPLE 5

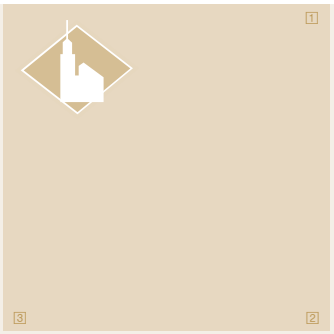
Mixed Land Uses

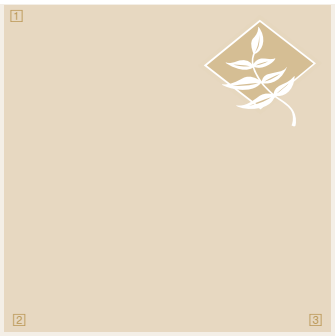
Building homes together with small businesses or even light industry is called "mixed-use" development, and it has proven to create active, vital neighborhoods. There are many examples of this type of development: a housing project near an employment center; a small shopping center near houses; or a high-rise building with ground-floor retail and apartments or condominiums upstairs. Mixed-use development near transit can boost ridership.

[1]
City of Yuba City
Town Center Project
Yuba City is avoiding the trends of strip development, residential growth into agricultural lands, and loss of employment to competing locations. The City's general plan focuses instead on revitalizing the downtown district, improving the riverfront, and creating a Town Square commercial district.

[2]
City of Davis
Aggie Village/Davis Commons
This grassy "gateway" to Davis pairs convenient parking with bicycle and pedestrian access. Its proximity to the neighborhood of Aggie Village, a development of petite-lot homes and pedestrian-friendly streets, makes it a prime example of a "walkable" mixed-use development.

[3]
City of Folsom
Folsom Historic Railroad Block
This six-acre mixed-use development will profit from the pedestrian traffic of the future adjoining light rail station in Historic Downtown Folsom. By 2005, plans call for construction of an 88-room hotel, 67,000 square feet of retail, 26 live-work lofts, 140 rental units, and a 60,000 square foot plaza.





PRINCIPLE 6

Natural Resources Conservation

Our quality of life is better when we have clean air to breathe and water to drink, and when we can experience the outdoors—in parks and greenbelts or in natural places. To ensure healthy and attractive natural environments we must preserve and maintain our open spaces and natural places and conserve the most productive farmland. Community design can help accomplish this by encouraging energy-efficient design, water conservation and storm water management, and the planting of shade trees to reduce ground temperatures in the summer.

[1]
Placer County
Placer Legacy
In 1998 Placer County adopted "Placer Legacy," a comprehensive open space and agricultural preservation program to implement the conservation goals laid out in the county's and cities' general plans. It seeks to encourage urban development in the community centers by preserving open space buffers between and around towns.

[2]
Sutter County
Contained Urbanization
The County directs new urban and suburban residential development to existing rural communities and within the spheres of influence of Yuba City and Live Oak.

[3]
Yolo County, Cities of Davis and Woodland
Open Space Preservation
Making headline news, Davis and Woodland have drawn a "green line in the dirt" to preserve 11,600 acres of farmland from urban development as a buffer between the two cities. Yolo County directs development to existing urbanized areas.

PRINCIPLE 7

Quality Design

How projects are developed, how they are oriented in relationship to the street, how well designed their façades are, if they have setbacks and where their garages are placed, all contribute to a community's attractiveness. This also influences how much people like to walk or bike and contributes to community pride and sense of ownership.

1
City of Auburn
Auburn Promenade
Once home to the Auburn Hotel, the newly renovated Auburn Promenade now leases its historic charm and style to businesses. Employees have immediate access to all of the pedestrian-friendly downtown.

2
City of Woodland
Krellenberg Court and Beamer Place
These 19th Century buildings were renovated with sensitivity to their historical features. Pedestrians can't pass by without being lured in by tempting shops and the charming architecture. A paseo links the front sidewalk to the rear patio, while providing the shops more window space.

3
City of Sacramento
Del Paso Nuevo
Construction continues on the "neo-traditional" project that imitates the small, pre-World War II-style neighborhood model. Three hundred homes will cluster around a town center. Attractive walkways and narrow roads will connect them to adjacent public services and stores.

1

2 3

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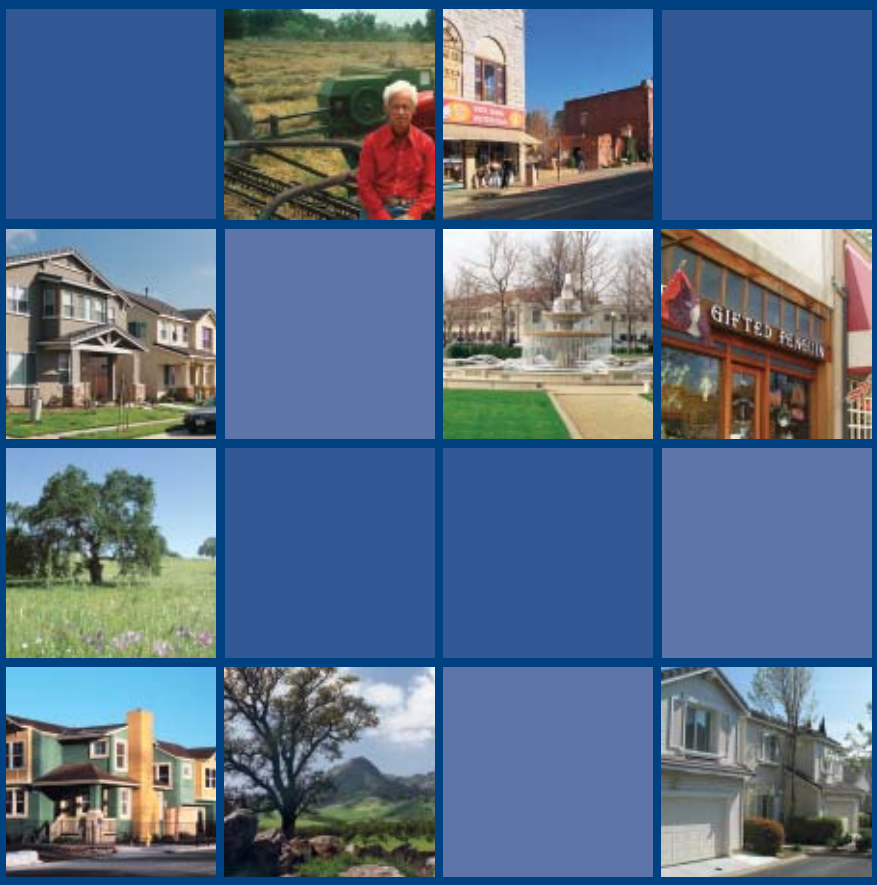

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APPENDIX E

JOBS-HOUSING
SELECTED BIBLIOGRAPHY

JOBS-HOUSING SELECTED BIBLIOGRAPHY

August 2005

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AFFORDABLE HOUSING AND TRANSPORTATION: Creating new linkages benefiting low-income families / Canby, Anne -- Washington, DC: Fannie Mae Foundation, 2003
Report also available full text via the World Wide Web:
http://www.fanniemaefoundation.org/programs/hff/pdf/HFF v5i2.pdf
Housing Facts & Findings - Vol. 5, no. 2 (2003)
"After housing, transportation is now the second biggest expense for America's families. New research indicates that the need to own one or more cars is placing homeownership out of reach for many low-income families, effectively restricting access to the single most effective tool for increasing family wealth." - (p. 1).

AFTER THE BUBBLE: Sustaining economic prosperity / Bay Area Council -- San Francisco, CA: Bay Area Council, 2002
(Bay Area Economic Profile: January 2002: Third in a Series)
Co-published by: Bay Area Economic Forum and Association of Bay Area Governments
Includes: Appendix A: Economic Performance and Quality of Life Data -- Appendix B: Performance by Industry Cluster
Full report available full text via the World Wide Web:
http://www.bayareacouncil.org/atf/cf/{2F567EB5-67C0-4CDA-9DD3-EC4A129D3322}/BAEF_Report_Final.pdf
“Despite the very good news about the region's competitive advantage, there is also concern about the high cost of doing business in the region,” said Executive Director of the Association of Bay Area Governments, Eugene Leong. “Working together, for example, the region simply must build a lot more housing closer to where the jobs are, and produce housing which is considerably more affordable than it is today. If we don’t, transportation congestion will worsen and environmental and energy problems will continue. The choice is ours.”

AN ANALYSIS OF RELATIONSHIPS BETWEEN URBAN FORM (DENSITY, MIX, AND JOBS - HOUSING BALANCE) AND TRAVEL BEHAVIOR (MODE CHOICE, TRIP GENERATION, TRIP LENGTH, AND TRAVEL TIME) / Frank, Lawrence D -- [Olympia, WA]: Washington State Dept. of Transportation; Distribution through the National Technical Information Service (NTIS) 1994
Final Technical Report - Urban form aspects of travel behavior.
May purchase NTIS Technical Report via the World Wide Web:
http://www.ntis.gov/search/index.asp?loc=3-0-0
Abstract: This project is part of a research agenda to discover ways to plan and implement urban forms that reduce dependence on the single occupancy vehicle (SOV). The purpose of this project was to empirically test the relationship between land use density, mix, jobs-housing balance, and travel behavior at the census tract level for two trip purposes: work and shopping. This project provides input into policies at the national, state, and local level targeted at the reduction of SOV travel and for urban form policies.

BARRIERS TO WORK: The spatial divide between jobs and welfare recipients in the metropolitan area / Pugh, Margaret -- Washington, DC: Brookings Institution, 1998
"Prepared for the Brookings Institution Center on Urban and Metropolitan Policy"
Also available full text via the World Wide Web:
http://www.brook.edu/es/urban/mismatch.pdf
Summary: The time limits and work requirements of the 1996 welfare reform law present a great challenge to large U.S. metropolitan areas, where hundreds of thousands of low-income people must find entry-level jobs. The welfare-to-work effort underway in American cities uncovers a phenomenon that many scholars already knew: there is a 'spatial mismatch' between where workers live and where jobs are located, and low-income workers often have no easy way to travel between home & work - (p. 1).

BAY AREA HOUSING PROFILE: 1999-2003 / Bay Area Council – 2nd edition – San Francisco, CA: Bay Area Council, 2004
Also available full text via the World Wide Web:
http://www.bayareacouncil.org/site/apps/s/content.asp?c=dkLRK7MMIqG&b=240390&ct=323193
The purpose of the Bay Area Housing Profile is to encourage local governments to plan for and accommodate a sufficient housing supply to match projected population increases and job generation. A report card with grades from A - F on the housing production performance of each jurisdiction is designed to shine a light on the problem for the media and regional and state policy-makers. The report card systematically and objectively analyzes the performance of each jurisdiction against their assigned and logical Fair Share responsibilities, and housing needed for job generation.

THE BEGINNING OF THE END OF SPRAWL? / Hughes, James W.; Seneca, Joseph J. -- Brunswick, NJ: Edward J. Bloustein School of Planning and Public Policy, 2004
(Rutgers Regional Report; Issue paper no. 21)
Also available full text via the World Wide Web:
http://policy.rutgers.edu/sprawl.pdf
Fundamental changes in the American economy occurred in the second half of the 1990s. The Internet emerged as a growth locomotive, productivity soared, and a new knowledge-based economy reshaped and dominated the economic fabric of both the nation and the Tri-State Region. What has not been fully documented, however, is the apparent shift in regional dynamics that became increasingly visible as the 1990s matured.

BENEFITS OF CRA / LA SOCIAL EQUITY POLICIES / Burns, Patrick; Flaming, Daniel; Haydamack, Brent -- Los Angeles, CA: The Economic Roundtable, 2004
Also available full text via the World Wide Web:
http://www.economicrt.org/download/form.html
Report prepared for: Community Redevelopment Agency of the City of Los Angeles
Executive summary: The mission of the Community Redevelopment Agency of Los Angeles (CRA/LA) is "building communities with jobs and housing." To implement this mission CRA/LA invests directly in its adopted redevelopment project areas, and other areas designated by the city, to improve the physical and economic environment, and thereby the lives of residents and workers, and to create a climate that attracts and sustains private investment.

BEST PERFORMING CITIES: Where America's jobs are created and sustained / DeVol, Ross C.; Wallace, Lorna -- Santa Monica, CA: Milken Institute, 2004
Co-published by: with Armen Bedroussian and Junghoon Ki
Also available full text via the World Wide Web:
http://www.milkeninstitute.org/pdf/best_performing_cities_2004.pdf
The top 20 Best Performing Cities among the largest 200 metropolitan areas in the United States reflect an assorted group of communities. A common key attribute among this year's listing is strength in services. A robust recovery in tourism is driving metro job growth in leisure and hospitality services. Growing populations and low U.S. interest rates support employment gains in home construction and related consumer industries; the growing populations of retirees are a catalyst for health care services.

BEYOND GRIDLOCK: **Meeting California's transportation needs in the twenty first century** / Corless, James; Sprowls, Sharon -- San Francisco, CA: Surface Transportation Policy Project (STPP), 2000
Also available full text via STPP/California Website:
http://www.transact.org/ca/
Introduction: Infrastructure investments in general, and transportation funding in particular, are increasingly seen as some of the most pressing policy issues affecting all levels of government in California today. The state has long been home to some of the fastest growing regions in the United States, and now is facing a near doubling of the population - from 34 million to 58 million by 2040. In the face of such an overwhelming increase in the number of California residents, there has understandably been strong interest in exactly how the state can provide both the physical infrastructure and the social services to keep pace. - (p. 4).

BRINGING HOUSING INTO BALANCE: East Bay Jobs/Housing Report / Economic Development Alliance for Business -- Final report -- [Alameda, CA]: EDAB, 2001
Also available full text via EDAB Website – reports & publications:
http://www.edab.org/
By any measure, the availability of housing has become a crisis throughout Alameda and Contra Costa Counties. Home ownership is out of reach for families of the median income. Vacancy rates among rental housing are as low as 2% in parts of the region. The 2000 Census data shows increases in the number of households in neighborhoods where there have been no appreciable increases in housing units.

THE CHANGING COMMUTE: A case study of the jobs-housing relationship over time / Wachs, Martin; Taylor, Brian D. -- CARFAX Publishing: London, UK, 1993
May be purchased via the World Wide Web:
http://www.tandf.co.uk/journals/carfax/00420980.html
Urban Studies - Vol. 30, no. 10 (December 1993) p. 1711-1730
Summary: Commuting patterns between home and work were studied among 30,000 employees of Kaiser Permanente, a major health care provider in Southern California. The study tracked the differences between home and work location among employees over 6 years by analyzing employee records and responses to a survey of over 1,500 of the workers. It was found that work trip lengths had in general no growth over the 6 year period.

CITIES, REGIONS AND THE DECLINE OF TRANSPORT COSTS / Glaeser, Edward L; Kohlhase, Janet E. -- Cambridge, MA: Harvard University - Harvard Institute of Economic Research (HIER), 2003
(Harvard Institute of Economic Research Discussion paper no. 2014)
Available full text via the World Wide Web:
http://post.economics.harvard.edu/hier/2003papers/HIER2014.pdf
Abstract: The theoretical framework of urban and regional economies is built on transportation costs for manufactured goods. But over the twentieth century, the costs of moving these goods have declined by over 90% in real terms, and there is little reason to doubt that this decline will continue. Moreover, technological change has eliminated the importance of fixed infrastructure transport (rail and water) that played a critical role in creating natural urban centres. In this article, we document this decline and explore several simple implications of a world where it is essentially free to move goods, but expensive to move people. We find empirical support for these implications.

COMMUNITY BUILDING, COMMUNITY BRIDGING: Linking neighborhood improvement initiatives and the new regionalism in the San Francisco Bay Area / Pastor, Manuel Jr., [et al.] -- Santa Cruz, CA: U.C. Santa Cruz Center for Justice, Tolerance, and Community, 2004
(CJTC Working Paper Series)
Co-authored by: Chris Benner, Rachel Rosner, Martha Matsuoka, & Julie Jacobs
Also available full text via the World Wide Web:
http://cjtc.ucsc.edu/docs/r_Community_Building_Community_Bridging.pdf
In recent years, the field of community development has undergone dramatic change. Comprehensive community initiatives have emerged that attempt to work across policy silos and integrate strategies in the realms of housing, employment, and health. Community organizing has resurfaced as a core element of neighborhood improvement, helping to strengthen social fabric and create new types of partnerships for underserved urban areas.

COMMUTING IN TRANSIT VERSUS AUTOMOBILE NEIGHBORHOODS / Cervero, Robert; Gorham, Roger -- Chicago, IL: American Planning Association, 1995
Available for purchase at the World Wide Web:
http://www.planning.org/japa/index.htm
Journal of the American Planning Association – V. 61, no. 2, Spring 1995 (p. 210-225)
A comparison is made of the commuting characteristics of transit-oriented and auto-oriented suburban neighborhoods in the San Francisco Bay Area and in Southern California. Transit neighborhoods averaged higher densities and had more gridded street patterns compared to their nearby counterparts with auto-oriented physical designs. Neighborhoods were matched in terms of median incomes and, to the extent possible, transit service levels, to control for...

COMPARISON OF RENTS AT TRANSIT-BASED HOUSING PROJECTS IN NORTHERN CALIFORNIA / Bernick, Michael; Cervero, Robert; Menotti, Val -- Berkeley, CA: U.C. Berkeley, IURD - National Transit Access Center, 1994
(U.C. Berkeley Institute of Urban and Regional Development Working paper; no. 624)
Available for purchase via the World Wide Web:
http://www-iurd.ced.berkeley.edu/workingpapers_1990-1995.htm
Increasingly, transit-based housing is finding favor among planners, transit officials, and even local politicians in California (Bernick, 1993). But do many Californians want to live near rail transit stations? If major residential projects are built near transit stations, will developers be able to charge rents equal or above those of similar projects of similar projects not near transit? The purpose of this report is to begin to probe such questions.

THE CONTINUING DECENTRALIZATION OF PEOPLE AND JOBS IN THE UNITED STATES / Lusk Center for Real Estate -- Los Angeles, CA: USC - School of Policy, Planning, and Development, 2002
Real Estate Research Brief (Winter 2002)
Also available full text via the World Wide Web:
http://www.usc.edu/schools/sppd/lusk/research/briefs/pdf/gordon_2002.pdf
The census of 2000 reported that since 1990 the U.S. population had grown by slightly more than 13 percent. Most of the nation's cities did not grow by this much, while most of their suburbs grew by as much or more. Of the largest 50 cities, only 13 exceeded national population growth (of the top 20, only four did). Predictably all of these were in the Sunbelt states. The census occurs every ten years and simply provides snapshots. This report offers a fuller picture of how population and employment in the 3,132 counties of the U.S. are decentralizing.

COURTS UPHOLD PROJECT DESCRIPTION, HOUSING ANALYSIS IN SEPARATE EIRS / Shigley, Paul -- Ventura, CA: California Planning and Development Report, 2004
CP&DR - Vol. 19, no. 8, (August 2004) p. 8-9
Article may be purchased via the World Wide Web:
http://www.cp-dr.com/binn/main.taf?function=archives
Two recent appellate court rulings appear to have clarified aspects of the California Environmental Quality Act and may have even broken new legal ground. One case involved the project description in an environmental impact report and in public notices. The court held that the identity of the proposed project's end user did not have to be disclosed. The other case contained a lengthy discussion about how to address a proposed project's impact on a community's jobs- housing ratio.

DISTINGUISHING CITY AND SUBURBAN MOVERS: Evidence from the American Housing Survey / Sanchez, Thomas W.; Dawkins, Casey J. – Washington, DC: Fannie Mae Foundation, 2001
Available full text via the World Wide Web:
http://www.fanniemaefoundation.org/programs/hpd/pdf/HPD_1203_sanchez.pdf
Housing Policy Debate - Vol. 12, no. 3 (Fall 2001)
As many metropolitan areas continue to sprawl, it is of interest to understand the location choices of people who move within urban areas. This study explores similarities and differences among movers to central cities and suburban locations. It looks at reasons for relocating, demographic differences, and other factors.

DEVELOPING WORKFORCE HOUSING IN LOS ANGELES: A deep primed market for on-going success / Livable Places -- Los Angeles, CA: Livable Places, 2004
Also available full text via the World Wide Web:
http://www.livableplaces.org/policy/pdf/developing-workforce.pdf
Livable Places is developing communities featuring new "workforce" housing that is moderately priced and addresses the demand for new homes generated by households with annual incomes ranging between $35,000 and $75,000 — which account for about one-third of all households in Los Angeles. These new communities, centrally located near transportation and employment centers, are well-positioned to meet the growing need for ownership housing.

DOWNTURN AND RECOVERY: RESTORING PROSPERITY / Bay Area Council -- [San Francisco, CA]: Bay Area Council, 2004
Co-published by: Bay Area Economic Forum and Association of Bay Area Governments
Full report available full text via the World Wide Web:
http://www.bayeconfor.org/pdf/BAEP_January04web.pdf
[This report] assesses the Bay Area's economy as it is emerging from its recent downturn, including both its sources of enduring strength and fundamental challenges and concerns regarding its future...The region's economy benefits from extraordinarily high levels of productivity, giving it a strong base for future growth and an important competitive edge over competing metropolitan areas...The vision, which emerged from a two-year public engagement process, provides for sufficient housing within the region to accommodate jobs growth over the next twenty years, in a manner that would optimize transportation infrastructure.

ECONOMIC DEVELOPMENT AND THE KNOWLEDGE ECONOMY IN CALIFORNIA'S INLAND EMPIRE: Progress or stagnation? / Tornatzky, Louis; Barreto, Matt A / Tomas Rivera Policy Institute -- Los Angeles, CA: USC School of Policy, Planning & Development, 2004
Also available full text via the World Wide Web:
http://www.trpi.org/PDFs/IE.pdf
The Inland Empire Region of Southern California is the fastest growing area in the state according to the 2000 Census. Between 1990 and 2000, Riverside and San Bernardino Counties added 700,000 to their population totals, an increase of 26 percent. While more and more people were moving to the region, economic reports have indicated that they were not always working in the region. While it is not clear whether this is a result of the low level of high-skill, high-wage job opportunities in the region, it is nonetheless an important fact of economic life.

EFFICIENT URBANIZATION: Economic performance and the shape of the metropolis / Cervero, Robert. -- Cambridge, MA: Lincoln Institute of Land Policy, 2000 (Lincoln Institute of Land Policy Working paper; WP00RC1)
Also available for purchase via the World Wide Web:
http://www.lincolninst.edu/pubs/pub-detail.asp?id=88
The influences of urban form and transportation infrastructure on economic performance show up in several contemporary policy debates, notably “sprawl versus compact city” and in the developing world, the future of mega-cities. This paper probes these relationships using two scales of analysis.

EMPLOYMENT ACCESS, RESIDENTIAL LOCATION AND HOMEOWNERSHIP / Deng, Yongheng; Ross, Stephen L.; Wachter, Susan M -- Pittsburg, PA: Univ. of Pennsylvania - The Wharton School, Real Estate Center, [1999]
Available full text via the World Wide Web:
http://knowledge.wharton.upenn.edu/PDFs/434.pdf
Large racial differences in home ownership have been a source of considerable concern among policymakers because homeownership choice may influence wealth accumulation, labor market outcomes, and even children's educational outcomes. Racial differences in ownership rates may be affected by discrimination ... This spatial pattern of ownership may discourage prospective minority homeowners because central city neighborhoods may face greater equity risk or have negative attributes that limit the value of homeownership.

ENVIRONMENTAL JUSTICE IN TRANSPORTATION PLANNING AND INVESTMENTS: Desk guide / ICF Consulting -- [Sacramento, CA]: CalTrans, 2003.
Report co-published by: Myra L. Frank & Associates.
"Prepared for California Department of Transportation, Division of Transportation Planning, Office of Policy Analysis & Research"
Includes glossary of transportation acronyms and terms and bibliography
Also available full text via the World Wide Web:
http://www.dot.ca.gov/hq/tpp/offices/opar/EJDeskGuideJan03.pdf
The quality and efficiency of transportation systems are important to a community's economic health. Transportation investments can provide access to jobs, create jobs directly, influence broader economic development, and affect property values. - (p. 3)

HOME OWNERSHIP AND UNEMPLOYMENT IN THE U.S. / Green, Richard K; Hendershott, Patric H -- [Washington, DC]: National Multi Housing Council, 1999
Also available full text via the World Wide Web:
http://www.nmhc.org/Content/ServeFile.cfm?FileID=165
Funding for this study was supplied by the National Multi Housing Council.
Abstract: The National Multi-Housing Council, a leading advocate for rental housing in the United States, has presented the results of a study that finds a direct correlation between unemployment and homeownership.

HOUSING PRICES AND THE LOCATION CHOICE OF FIRMS / Kroll, Cynthia A; Landis, John D -- Berkeley, CA: U.C. Berkeley - Institute of Business and Economic Research, 1991
(Univ. of California, Berkeley - IBER; Working paper no. 91-189)
Paper may be purchased via the World Wide Web:
http://urbanpolicy.berkeley.edu/research.htm
High housing prices are often cited by business leaders as a source of concern. High housing prices, it is alleged, will cause labor-cost sensitive firs to leave high-priced areas, and make it difficult to attract new firms. To test this hypothesis, a business location survey was undertaken of larger (50 or more employees) business establishments in a variety of growing metropolitan economies.

IMPACTS OF URBAN FORM ON TRAVEL: A critical review / Crane, Randall -- Cambridge, MA: Lincoln Institute of Land Policy, 1999
(Lincoln Institute of Land Policy Working Paper)
Also available full text via the World Wide Web:
http://www.sactaqc.org/resources/literature/landuse/urban_form_travel.htm
Abstract: What is the scope for using land use and urban design to reduce automobile travel? This paper reviews the recent literature on how the built environment may or may not influence travel behavior. It begins with a short summary of urban spatial theory and other conceptual frameworks explicitly linking urban structure to travel. This is followed by work that uses data on actual behavior to examine and then test several hypotheses. The paper summarizes these studies at the same time that it critically evaluates their data, methods, and conclusions. It concludes that while research on this important set of topics is improving in several respects, our current understanding of these relationships remains poor.

INDEX OF SILICON VALLEY 2004: Measuring progress toward the goals of Silicon Valley 2010 / Joint Venture -- San Jose, CA: Silicon Valley Network, Inc., 2004
"Special Analysis: Where the Jobs Are: Our Region's Occupational Structure"
Also available full text via the World Wide Web:
http://www.jointventure.org/PDF/2004index.pdf
Employment is growing in the Health Services industry and the biomedical industry cluster is becoming more concentrated in Silicon Valley as its employment grows relative to the nation. Our region's productivity continues to grow. There are some benefits to our economic slowdown: our freeways are less congested and apartment rental rates are dropping. Our development patterns are producing less rather than more sprawl. The 2004 Index of Silicon Valley documents these and other significant changes, as well as the continuing challenges facing our region.

THE IMPORTANCE OF PLACE IN WELFARE REFORM: Common challenges for central cities and remote-rural areas / Fisher, Monica G.; Weber, Bruce A -- Washington, DC: Brookings Institution, Center on Urban & Metropolitan Policy, 2002
(Brookings Center, Research Brief; no. 1 - June 2002)
Also available full text via the World Wide Web:
http://www.brookings.edu/dybdocroot/es/urban/publications/weberfull.pdf
"Policymakers debating the reauthorization of the 1996 law could help states meet the common challenges facing welfare participants in cities and remote rural areas by: (a) preserving state flexibility in implementation to address the particular needs of urban and rural populations; (b) providing dedicated funding for transitional jobs programs that help long-term recipients acquire the basic skills to find and retain employment; (c) promoting better access to transportation options for low-income city and rural workers who are isolated from job opportunities" - (p. v).

INCREASING TRANSIT RIDERSHIP: Lessons from the most successful transit systems in the 1990s / Taylor, Brian, [et al.] -- San Jose, CA: Mineta Transportation Institute, 2002
(MTI Report no. 01-22; June 2002)
Available full text (192 pages) via the World Wide Web:
http://transweb.sjsu.edu/publications/transitridership2/TransitRidership%5F7%5F16.pdf
Executive summary: This study examines trends in U.S. public transit ridership during the 1990s. Specifically, we focus on agencies that increased ridership during the latter half of the decade. While transit ridership increased by 13 percent nationwide between 1995 and 1999, not all systems experienced ridership growth equally. While some agencies increased ridership dramatically some did so only minimally and still others lost riders. What sets these agencies apart from one another? What explains the uneven growth in ridership?

THE INFLUENCE OF LAND USE ON TRAVEL BEHAVIOR: Specification and estimation strategies / Boarnet, Marlon G.; Crane, Randall -- [Miamisburg, OH]: Elsevier Ltd. [2001]
May be purchased via the World Wide Web:
http://www.elseviersocialsciences.com/transport/
Transportation Research Part A: Policy and Practice, Vol. 35, Issue 9 (Nov. 2001) p. 823-845
While the relationship between urban form and travel behavior is a key element of many current planning initiatives aimed at reducing car travel, the literature faces two major problems. First, this relationship is extremely complex. Second, several specification and estimation issues are poorly addressed in prior work, possibly generating biased results. We argue that many of the latter problems are overcome by systematically isolating the separable influences of urban design characteristics on travel and then properly analyzing individual-level data.

INTRAMETROPOLITAN LOCATIONAL PATTERNS OF PEOPLE AND JOBS: Which government interventions make a difference? / Bollinger, Christopher R.; Ihlanfeldt, Keith R -- Washington, DC: Lincoln Institute of Land Policy, 2000
Funding for report: Brookings Institution and Lincoln Institute of Land Policy
Also available full text via the World Wide Web:
http://www.fsu.edu/~localgov/papers/archive/Bollinger_001.PDF
"Another policy objective is to create more job opportunities for less-skilled workers living in economically depressed neighborhoods. Both capital and labor subsidies have been tried. Our results confirm the findings of previous studies that property tax abatements (a capital subsidy) is a poor method of job creation. On the other hand, job tax credits (a labor subsidy) are effective in attracting manufacturing jobs, especially in the long run after firms have fully adjusted to agglomeration economies." - (p. iv).

JOB SPRAWL: Employment location in U.S. metropolitan areas / Glaeser, Edward L.; Kahn, Matthew; Chu, Chenghuan -- Washington, DC: Brookings Institution, Center on Urban & Metropolitan Policy, 2001
(Brookings Institution Survey Series; May 2001)
Available full text via the World Wide Web:
http://www.brook.edu/es/urban/publications/glaeserjobsprawl.pdf
"People traditionally have lived close to one another to lower the costs of moving themselves, their goods, and their ideas. At the start of the last century, urban Americans lived and worked in city centers. Living and working at high densities enabled people to travel using only their feet and allowed firms to move goods using rail and water. As late as 1950, the typical city still had a high density core where most people worked, but a majority of these workers actually lived in the suburbs and commuted by car. As the costs of transport have fallen, people have been able to live-- and, increasingly, work-- a little less close to one another. The high-density walking city of 1900 has been replaced by the medium driving city of 2000." - (p. 1).

JOB SPRAWL AND THE SPATIAL MISMATCH BETWEEN BLACKS AND JOBS / Stoll, Michael A. -- Washington, DC: Brookings Institution, Metropolitan Policy Program, 2005
(Brookings Institution Survey Series; February 2005)
Also available full text via the World Wide Web:
http://www.brookings.org/dybdocroot/metro/pubs/20050214_jobsprawl.pdf
Scholars and policy makers concerned with racial inequality have long pointed to the racial segregation of African Americans as a key determinant of black poverty. The confinement of black households to geographically isolated inner-city neighborhoods has been linked to relatively poor employment outcomes, among other factors. The results strongly suggest that job sprawl exacerbates certain dimensions of racial inequality in America. By better linking job growth with existing residential patterns, policies to promote balanced metropolitan development could help narrow the spatial mismatch between blacks and jobs, and improve their employment outcomes over time.

JOBS-HOUSING BALANCE / Weitz, Jerry -- Chicago, IL: American Planning Association (APA), 2003
(APA Planning Advisory Service; PAS no. 516)
Also available for purchase at the World Wide Web:
http://www.planning.org/pas/reports.htm
Summary: Some have argued that the market is the mechanism that will achieve such balance. Weitz, in his research of four types of jobs-housing imbalance, concludes that, in fact, the market has failed to achieve balance in three of the four jobs-housing balance scenarios he lays out. He provides a number of case studies to support his findings, including one from King County, Washington, showing that increases in housing costs are more gradual in areas with a jobs-housing balance. This report counters the skeptics and points to those actions planners can take to help bring appropriate housing, jobs, and workforces together, resulting in overall community improvements.

JOBS-HOUSING BALANCE: Community choices: quality growth toolkit / Atlanta Regional Commission (ARC) -- [Atlanta, GA]: ARC, [2002]
Guidebook includes bibliographical references.
Available full text via the World Wide Web:
http://www.atlreg.com/qualitygrowth/Planning/Toolkits/JOBS_HOUSING_BALANCE_TOOL.PDF
Trends show that people are driving more places at longer distances. Nationally, the number of vehicle trips between 1969 and 1990 increased more than three times as fast as the population, and average trip distance increased by 9 percent during the same period. Land use patterns – which have increased travel distances because of the separation of homes, jobs, and other destinations – accounted for approximately one-third of the increase in driving. – (p. 1).

THE JOBS-HOUSING BALANCE AND URBAN COMMUTING / Peng, Zhong-Ren -- London, UK: Carfax Publishing, 1997
May be purchased via the World Wide Web:
http://www.tandf.co.uk/journals/carfax/00420980.html
Urban Studies - Vol. 34, no. 8 (July 1997) p. 1215-1235
This paper applies geographical information system (GIS) techniques and piecewise, non-linear model-spline functions-to analyse empirically the relationship between the jobs-housing ratio and urban commuting patterns in terms of vehicle miles travelled (VMT) and trip length. A dynamic buffering process in GIS is developed to measure the jobs-housing ratio within floating catchment areas of a 5-7 mile (8.05-11.27 km) radius as opposed to pre-defined and arbitrary jurisdictional boundaries.

JOBS / HOUSING BALANCE AS PUBLIC POLICY / Cervero, Robert -- Washington, DC: Urban Land Institute, 1991
May be purchased via the World Wide Web:
http://www.uli.org
Urban Land - Vol. 50, no. 10 (October 1991) p. 10-14
Many urbanized regions around the United States suffer a jobs/housing imbalance, a geographic mismatch in the location of jobs and housing that is forcing growing numbers of workers to commute long distances. Much of the blame lies in the shortage of affordable housing near new job centers. Perhaps nowhere is this more evident than in California. - (p. 10)

JOBS-HOUSING BALANCE REVISITED: Trends and impacts in the San Francisco Bay Area / Cervero, Robert -- [Chicago, IL]: American Planning Association, 1996
May be purchased via the World Wide Web:
http://pqasb.pqarchiver.com/planning/search.html
Journal of the American Planning Association – V. 62, no. 4 (Autumn 1996) p. 492-511
Abstract: Regions in California have recently set jobs-housing balance targets, to relieve traffic congestion and improve air quality. Critics of such targets charge that many factors prevent people from living near their workplaces, and that market forces, left unobstructed, work to produce balance – that is, people and firms co-locate to reduce imbalances. Article compares changes in the ratios of jobs to employed residents in 23 large San Francisco Bay Area cities during the 1980s.

KEEPING UP WITH THE JONESES: Radial vs. multidestinational transit in decentralizing regions / Thompson, Gregory L.; Matoff, Thomas G. -- [Chicago, IL]: American Planning Association, 2003
Available for purchase via the World Wide Web:
http://pqasb.pqarchiver.com/planning/search.html
Journal of the American Planning Association – V. 69, no. 3 (Summer 2003) p. 296-312
Abstract: Increasingly dispersed travel patterns in contemporary American urban areas raise questions about appropriate policy for fixed-route public transit, particularly rail transit. Some argue that fixed transit routes should be radial, serving only regional central business districts and adjoining inner-city neighborhoods; others argue that fixed routes should be reconfigured as networks to serve many regional destinations. This article evaluates these two approaches with an examination.

L.A. COUNTY MOVING TOGETHER TO PROMOTE SMARTER GROWTH: Report on infill opportunities / Fregonese Calthorpe Associates -- Final draft -- [Los Angeles, CA]: Mobility 21 Smart Growth Partnership, 2004
Mobility 21 is a Coalition for Transportation Advocacy in Los Angeles County.
Also available full text via the World Wide Web:
http://www.mobility21coalition.com/smartgrowth/pdf/white_paper1.pdf
The supply of usable vacant land is dwindling. Cities and developers must look toward mixed-use development as a tool to sustain growth. New jobs and housing will need to be constructed in existing developed areas that are capable of supporting additional growth.

LINKING LAND USE AND TRANSPORTATION: Models for ISTEA and Clean Air Act Implementation - Resource Manual / Lincoln Institute of Land Policy -- Cambridge, MA: Lincoln Institute of Land Policy, 1993
Co-published by: The American Planning Association
Report includes bibliographical references.
Contents: Section I) ISTEA and The CAA Amendment -- Section II) Urban Growth Trends and Travel Behavior -- Section III) The Land Use - Transportation Link -- Section IV) Zoning Ordinances and Design Guidelines -- Section V) Transportation Demand Management -- Section VI) Making the Land Use, Transportation, and Air Quality Connection -- Section VII) Case Study: San Diego / Transit-Oriented Development Design Guidelines / prepared by Calthorpe Associates for the City of San Diego
Also: HE206.2 .L564 1993 *– U.C. Berkeley Environmental Design Library*

LIVING ON THE TEETER-TOTTER: The balance between jobs & housing in King County / Washington Research Council -- Seattle, WA: Washington Research Council, 2000
Also available full text via the World Wide Web:
http://www.researchcouncil.org/Reports/2000/JobsHousing1/KingCoJobsHousingBal.pdf
Introduction: The Growth Management Act seeks to channel development to urban areas and reduce sprawl. Most development is to be confined within an urban growth boundary. To accomplish this, the Act increased the powers & obligations of urban counties to regulate land use.

THE LONG JOURNEY TO WORK: A Federal transportation policy for working families / Blumenberg, Evelyn; Waller, Margy -- Washington, DC: Brookings Institution, Center on Urban & Metropolitan Policy, 2003
(Brookings Institution Series on Transportation Reform; July 2003)
Also available full text via the World Wide Web:
http://www.brookings.edu/dybdocroot/es/urban/publications/20030801_Waller.pdf
"To work, low-income adults need to get to work. However, traveling to jobs is frequently easier said than done, particularly for those without access to fast, reliable transportation. In almost every city, automobiles remain the fastest and most reliable way to get around. Moreover, the continuing decentralization of population and employment has exacerbated the isolation of many low-income families who lack reliable auto access."

MAKING WORK: A new study suggests that state and local tax incentives for existing businesses don't create new jobs / Fulton, William -- [Washington, DC]: Congressional Quarterly, Inc., 2003
Article available full text via the World Wide Web:
http://www.governing.com/archive/2003/jun/econ.txt
Governing - June 2003
"Gabe and Kraybill not only looked at the number of jobs actually created but also compared that with the number of jobs estimated at the time the business expansion was announced... in other words, the businesses taking state money announced much more ambitious plans to add workers but came in at about the same level as businesses that didn't take state money." - (p. [2]).

MARKET OPPORTUNITIES AND BARRIERS TO TRANSIT-BASED DEVELOPMENT IN CALIFORNIA / Bernick, Michael; Cervero, Robert; Gilbert, Jill -- Berkeley, CA: U.C. Berkeley, IURD - National Transit Access Center, 1994
(U.C. Berkeley Institute of Urban and Regional Development working paper; no. 621)
Includes bibliographical references
Available for purchase via the World Wide Web:
http://www-iurd.ced.berkeley.edu/workingpapers_1990-1995.htm
This report investigates the market opportunities and barriers to transit-based development in California. A combination of field research, informant interviews, and literature surveys were used in identifying market opportunities and barriers. Particular attention has been placed on the opportunities for focusing housing development near rail stations, as well as the barriers that stand in the way. - (p. 1)

MISSING THE BUS: How states fail to connect economic development with public transit / Khan, Mafruza; LeRoy, Greg -- [Washington, DC]: Good Jobs First, 2003
Also available full text via the World Wide Web:
http://www.goodjobsfirst.org/pdf/bus.pdf
Good Jobs First released a 50-state study which finds that not one single state coordinates its economic development spending with public transportation. It also finds that 46 states fail to even collect data on subsidized corporate relocations and therefore cannot determine if their economic development incentives are undermining job access for low-wage workers. “Our findings are deeply troubling,” said Greg LeRoy, executive director of Good Jobs First. “They suggest that states are not really serious about making sure their economic development programs benefit all people, including low-wage workers who cannot afford a car. They also suggest a wasteful lack of coordination between state development and transportation agencies.”

A MOBILE STRATEGY FOR IMPROVING OPPORTUNITY / Hughes, Mark Alan -- Washington, DC: Fannie Mae Foundation, 1995
Available full text at the World Wide Web:
http://www.fanniemaefoundation.org/programs/hpd/pdf/hpd_0601_hughes.pdf
Housing Policy Debate - Vol. 6, no. 1 (p. 271-297)
The three main strategies for confronting inner-city poverty are dispersal, development, and mobility. These strategies are discussed and compared, with particular emphasis on the mobility approach. The article argues that the mobility approach - which connects poor inner-city residents to suburban employment opportunities without changing the location of households or firms – is the most promising near-term strategy for combating urban poverty.

MOVING UP VERSUS MOVING OUT: Neighborhood effects in housing mobility programs / de Souza Briggs, Xavier -- Washington, DC: Fannie Mae Foundation, 1997
Available full text at the World Wide Web:
http://www.fanniemaefoundation.org/programs/hpd/pdf/hpd_0801_briggs.pdf
Housing Policy Debate - Vol. 8, no. 1 (p. 195-234)
Abstract: This article suggests ways to better design, conduct, and interpret evaluations of the effects of housing mobility programs on participants, with emphasis on how to isolate neighborhood effects. It reviews earlier critiques of neighborhood effects research and discusses the key assumptions of housing mobility programs about the benefits of affluent neighbors, the spatial organization of opportunity for the urban poor, and the meanings of "neighborhood" to residents, researchers, and policy makers.

NEIGHBOURHOOD COMPOSITION AND RESIDENTIAL PRICES: Does exclusion raise or lower values? / Cervero, Robert; Duncan, Michael -- London, UK: CARFAX Publishing, 2004
Urban Studies - Vol. 41, no. 2 (February 2004) p. 299-315
Conclusion: A logical inference from these findings is that building housing in areas with fairly diverse land uses and a good jobs-housing balance can indirectly improve the fiscal positions of local governments through the higher property tax proceeds that are generated from the resulting higher market (and assessed) values of residential parcels. To the degree that housing is built near rail transit stops, the property-tax benefits can be expected to be even greater. - (p. 312)

THE NEW ECONOMY AND JOBS/HOUSING BALANCE IN SOUTHERN CALIFORNIA / Southern California Association of Governments -- Los Angeles, CA: SCAG, 2001
Introduction available full text via the World Wide Web:
http://www.scag.ca.gov/Housing/pdfs/balancenomaps.pdf
Affordable housing is in desperate demand in northern Orange County and southern Los Angeles County. High paying jobs are needed particularly in the Inland Empire and other outlying areas where higher incomes are needed for workers to purchase the housing that is being constructed. Using a variety of conventional and innovative new strategies, policy makers can begin to address problems associated with regional jobs/housing imbalance. – (p. 10)

PAYING FOR PROSPERITY: Impact fees and job growth / Nelson, Arthur C.; Moody, Mitch -- Washington, DC: Brookings Institution - Center on Urban & Metropolitan Policy, 2003.
Also available full text via the World Wide Web:
http://www.brookings.edu/dybdocroot/es/urban/publications/nelsonimpactfees.pdf
This report addresses the controversy around impact fees by reviewing the academic literature concerning the effect of impact fees on employment and the economy generally. In addition, the report presents a new analysis of the relationship between impact fees and job creations by assessing impact fee and economic data, assembled for the period 1993-1999, for the 67 counties of Florida. - (p. vi.)

PROJECTIONS - 2003: Forecasts for the San Francisco Bay Area to the year 2030 / Association of Bay Area Governments -- Oakland, CA: ABAG, [2003]
Electronic database online version includes Census Tract forecasts for SF Bay Area.
Annual report includes: 1 CD-Rom disk - Requires Adobe Acrobat Reader
May be purchased via the World Wide Web:
http://data.abag.ca.gov/p2003/summary.htm
The Association of Bay Area Governments (ABAG) has been producing a series of long-run economic-demographic forecasts since 1973. That series, known as Projections has gone through a number of changes. Over time, the forecast has become fairly standardized and has been produced every two years. The document includes data for local areas and counties in five-year increments. This year, ABAG is producing a forecast that doesn't look very different (with the exception of the cover), but is based on some very different assumptions, especially policy assumptions.

PROJECTIONS – 2005: Forecasts for the San Francisco Bay Area to the year 2030 / Association of Bay Area Governments (ABAG) -- Oakland, CA: ABAG, 2005
Plus 1 CD-Rom: Requires Adobe Acrobat Reader (December 2004)
May be purchased via the World Wide Web:
http://www.abag.ca.gov/abag/overview/datacenter/databod.html
Using smart growth principles 'Projections 2005' forecasts population, employment, income, and households for the San Francisco Bay Area. Forecast includes 2000, 2005, 2010, 2015, 2020, 2025, and 2030. Report compiles data for the region, nine counties, and over 100 cities. 'Projections 2005' provides insight into the region's economy as well as county labor force and age distributions.

RAIL-ORIENTED OFFICE DEVELOPMENT IN CALIFORNIA: How successful? / Cervero, Robert -- [Westport, CT]: Eno Foundation for Transportation, 1994
Article includes bibliographical references.
May be purchased via the World Wide Web:
http://www.enotrans.com/Publications/Transportation_Quarterly/transportation_quarterly.html
Transportation Quarterly - Vol. 48, no. 1 (Winter 1994) p. 33-44
Abstract: Examines public ridership impacts of large-scale office projects near stations of five rail transit in California. Key factors that influence the modal choices of station-area office workers; Effects of built environment such as density and land-use mixtures on rail modal splits; Mobility and environmental impacts of clustered housing development at transit stops.

THE REAL JOBS-HOUSING MISMATCH: Stagnating wages and rising housing costs are threatening the stability of the rental housing market / Belsky, Eric; Calder, Allegra; Drew, Rachel -- Montclair, NJ: National Housing Institute (NHI), 2004
Shelterforce - Issue no. 136 (July / August 2004) p. 18-21
Also available via the World Wide Web:
http://www.nhi.org/online/issues/136/mismatch.html
“There is a fundamental disconnect between the rate at which the incomes of low-income households are growing and the rate at which rents are escalating. For millions of renters, there is little hope of escape from shouldering heavy housing cost burdens (near record levels), living in crowded conditions (at record levels) or renting severely inadequate housing – for the simple reason that the economy mints millions of low-wage full- and part-time jobs that provide incomes too meager to cover the cost of modest rental housing.” - (p. 18)

REGIONS THAT WORK: How cities and suburbs can grow together / Pastor Jr., Manuel; Dreier, Peter; Grigsby, J. Eugene; & Lopez-Garza, Marta -- Minneapolis, MN: University of Minnesota Press, c2000
(Globalization and Community series; v. 6)
May be purchased via the World Wide Web:
http://www.upress.umn.edu/Books/P/pastor_regions.html
Abstract: Offering a new vision of community-based regionalism, this book arrives just as "smart growth" measures and other attempts to link cities and suburbs are beginning to make their mark on the political and analytical scene. The authors make a powerful case for emphasizing equity, arguing that metropolitan areas must reduce poverty in order to grow and that low-income individuals must make regional connections in order to escape poverty. A hard-hitting analysis of Los Angeles demonstrates that the roots of the unrest of 1992 lay in regional economic deterioration and that the recovery was slowed by insufficient attention to the poor.

RETHINKING ACCESSIBILITY AND JOBS-HOUSING BALANCE / Levine, Jonathan -- [Chicago, IL]: American Planning Association, 1998
May be purchased via the World Wide Web:
http://pqasb.pqarchiver.com/planning/search.html
Journal of the American Planning Association - V. 64, no. 2 (Spring 1998) p. 133-149
Through estimation of a discrete choice model of residential location, this study argues that commute time remains a dominant determinant of residential location at the regional scale, and that provision of affordable housing near employment concentrations can influence residential location decisions for low-to-moderate-income, single-worker households. However, the significance of jobs-housing balance is not in reducing congestion; even when successful, such policies will have little impact...

RIGHT HOME IN THE RIGHT PLACE AT THE RIGHT PRICE: **California's regional and Statewide challenges of housing availability, jobs-housing balance, and housing costs and some options to meet them** / DeGiere, Gregory / California, Senate Office of Research. -- Sacramento, CA: Senate Publications, 1999
(Senate Publications stock no.: 1001-S)
Available for purchase via the World Wide Web:
http://www.sen.ca.gov/publications/subject/EMPLOY.txt
Report on California's regional and statewide challenges of housing availability, jobs-housing balance and housing costs and some options to meet them. In this report, the Senate Office of Research, using data developed by the Senate Demographics Office, presents both original research and summaries of other recent studies detailing the nature and extent of the problems statewide and by region.

SHOWDOWN AT SHOWPLACE SQUARE: DOES SAN FRANCISCO HAVE ROOM FOR INDUSTRY? / Landau, Nathan -- New Haven, CT: The Next American City, Inc. 2005
Also available full text via the World Wide Web:
http://americancity.org/article.php?id article=115
The Next American City - no. 8 (The Urban/Rural Edge) April 2005
Showplace Square doesn't look like the other neighborhoods of San Francisco. Rows of Victorian houses and newly built luxury lofts can be seen on a rise blocks away, but there are none here. There are also few tourists, though it's less than a mile from the baseball stadium. The high-rises of the Financial District are within sight, but there are no corporate towers.

THE SPATIAL MISMATCH HYPOTHESIS: A review of recent studies and their implications for welfare reform / Ihlanfeldt, Keith R.; Sjoquist, David L -- Washington, DC: Fannie Mae Foundation, 1998
Housing Policy Debate - Vol. 9, no. 4 (p. 849 - 892)
Also available full text via the World Wide Web:
http://www.fanniemaefoundation.org/programs/hpd/pdf/hpd_0904_ihlanfeldt.pdf
In 1992, Housing Policy Debate published John Kain's comprehensive review of the extensive scholarly literature on the spatial mismatch hypothesis. This hypothesis maintains that the suburbanization of jobs and involuntary housing market segregation have acted together to create a surplus of workers relative to the number of available jobs in sub-metropolitan areas where blacks are concentrated.

A STATE OF DIVERSITY: Demographic trends in California's regions / Johnson, Hans P. -- San Francisco, CA: Public Policy Institute of California (PPIC), 2002
California Counts - Vol. 3, no. 5 (May 2002) p. 1-16
Also available full text at the World Wide Web:
http://www.ppic.org/content/pubs/CC_502HJCC.pdf
Paper uses recent data from the 2000 census to examine similarities and differences in demographic trends and patterns across the nine major regions of the state over the past ten years. Report looks in particular at the demographic sources of population growth, relationships between population and job and housing growth, changing racial and ethnic diversity, age structure, and variations in per capita income across regions.

STATE POLICY APPROACHES TO PROMOTE METROPOLITAN ECONOMIC STRATEGY / Weiss, Marc A. -- National Governors Association - Center for Best Practices, 2002
Available full text via the World Wide Web:
http://www.nga.org/cda/files/1002STATEPOLICYAPPROACHES.pdf
[This report] is intended to provide Governors and state policymakers with an overview of what can make regional metropolitan economies grow. While appropriate metropolitan economic strategy must be determined by the agreement of local stakeholders, this report focuses on two key elements of any successful policy: investing in fundamental assets and building dynamic industry networks (clusters). In addition, this report discusses specific policy recommendations for linking inner cities to the region's growth.

STILL STUCK IN TRAFFIC: Coping with peak-hour traffic congestion / Downs, Anthony -- Washington, DC: Brookings Institution Press, c2004
Revised edition of: Stuck in Traffic (1992)
May be purchased via the World Wide Web:
http://www.brookings.edu/press/books/stillstuckintraffic.htm
Congested roads waste commuters' time, cost them money, and degrades the environment. Most Americans agree that traffic congestion is the major problem in their communities—and it only seems to be getting worse. In this revised and expanded edition of his landmark work Stuck in Traffic, Anthony Downs examines the benefits and costs of various anti-congestion strategies. Drawing on a significant body of research by transportation experts and land-use planners, he counters environmentalists and road lobbyists alike by explaining why seemingly simple solutions, such as expanding public transit or expanding roads, have unintended consequences that cancel out their apparent advantages.

STUCK IN TRAFFIC: Coping with peak-hour traffic congestion / Downs, Anthony -- Cambridge, MA: Lincoln Institute of Land Policy, 1992
Book includes bibliographical references and index.
In this ... book, Anthony Downs looks at the causes of worsening traffic congestion, especially in suburban areas, and considers the possible remedies, while analyzing the specific advantages and disadvantages of every major strategy that has been proposed to reduce congestion.
Available: HE355.3.C64 D69 1992 - *California State Library, Reference Center*

STRATEGIES FOR SOLUTIONS: Southern California Real Estate Summit resources and regulatory constraints to growth / Lusk Center for Real Estate -- Summit Report -- Los Angeles, CA: University of Southern California. 2001
Strategies for Solutions Summit (Los Angeles, September 13, 2001)
Also available full text via the World Wide Web:
http://www.uli-la.org/publications/pdf/summit2001report.pdf
The Summit presented smaller interactive workshops that addressed four key issues: entitlement reform, jobs/housing balance, water, and urban quality of life. This report is designed to share ideas and best practices from the Summit, to contribute to the thinking on growth issues in Southern California, to suggest solutions, and to provide the foundation for future collaboration on the issues.

STRENGTHENING OUR WORKFORCE AND OUR COMMUNITIES THROUGH HOUSING SOLUTIONS / Joint Center for Housing Studies of Harvard University (JCHS) -- Cambridge, MA: JCHS, 2005
Co-published by: Center for Workforce Preparation, U.S. Chamber of Commerce
Also available full text via the World Wide Web:
http://www.jchs.harvard.edu/publications/markets/wh05-1_workforce_housing_report.pdf
Chambers of commerce can play an important role in addressing workforce housing needs. Indeed, many of them are doing so --particularly in communities in which high housing costs add to the cost of doing business. The initiatives undertaken by such chambers could benefit from the involvement of housing professionals. For their part, housing professionals could usefully solicit the involvement of the local business community, broadening the base of support for workforce housing initiatives.

TRAFFIC AND SPRAWL: Evidence from U.S. commuting from 1985-1997 / Crane, Randall; Chatman, Daniel G -- Los Angeles, CA: University of Southern California, 2003
Planning & Markets - Vol. 6, Issue 1, September 2003
Also available full text via the World Wide Web:
http://www-pam.usc.edu/volume6/v6i1a3s1.html
The consequences of sprawl for travel behavior remain unclear. Theory suggests at least two possible commuting outcomes. As jobs decentralize and central employment areas congest, workers might shorten their commutes in time and distance by relocating to the suburbs. Or, the average commute could grow if residential choice is relatively inelastic with respect to job location, amenity explanations for residential and job location dominate, or as dual-worker households in polycentric labor markets become the norm. In brief, we find that the more suburbanized is employment -- that is, the more sprawl -- the shorter the average commute. There are strong differences by industry, however.

TRAFFIC: WHY IT'S GETTING WORSE, WHAT GOVERNMENT CAN DO / Downs, Anthony -- Washington, DC: Brookings Institution, 2004
(Brookings Institution Policy Brief; no. 128)
Also available full text via the World Wide Web:
http://www.brookings.edu/dybdocroot/comm/policybriefs/pb128.pdf
Rising traffic congestion is an inescapable condition in large and growing metropolitan areas across the world from Los Angeles to Tokyo, from Cairo to San Paolo. Peak-hour traffic congestion is an inherent result of the way modern societies operate. It stems from the widespread desires of people to pursue certain goals that inevitably overload existing roads and transit systems every day. - (p. 1).

TRANSIT JOINT DEVELOPMENT IN THE UNITED STATES / Cervero, Robert; Hall, Peter; Landis, John -- Berkeley, CA: U.C. Berkeley, IURD - National Transit Access Center, 1992
(U.C. Berkeley - Institute of Urban and Regional Development; Monograph no. 42)
Available for purchase via the World Wide Web:
http://www-iurd.ced.berkeley.edu/monograph_titles.htm
This report reviews transit-linked development in over two dozen U.S. cities, the history of joint development, and the evolving role of the Federal Transit Administration... The study concludes with an assessment of the institutional and market conditions necessary for successful joint development and recommendations to FTA for promoting and facilitating local joint-development efforts. - (p. viii)

THE TRANSIT METROPOLIS: A global inquiry / Cervero, Robert -- Washington, DC: Island Press, 1998
To access book review by Stephen M. Wheeler:
http://www-dcrp.ced.berkeley.edu/bpj/pdf/14-Wheeler-2.pdf
Partial contents: Pt. 1) The Case for the Transit Metropolis / Ch. 1) Transit and the Metropolis: Finding Harmony -- Ch. 2) Transit and the Changing World -- Ch. 3) Public Policies and the Sustainable Transit Metropolis -- Pt. 2) Adaptive Cities: Creating a Transit-Oriented Built Form
Also: HE305 .C474 1998 – *U.C. Berkeley, Environmental Design Library*

TRANSIT VILLAGES AND TRANSIT-BASED DEVELOPMENT: The rules are becoming more flexible : how government can work with the private sector to make it happen / Bernick, Michael S.; Freilich, Amy E. -- Chicago, IL: American Bar Association, [1998]
Urban Lawyer - V. 30, no. 1 (Winter 1998)
Reprints: http://www1.law.umkc.edu/Urbanlawyer/reprint.htm
“Joint public / private participation in transit-based development, including the 'transit village' concept -- the concept of building new communities at transit stations both in suburban and inner city areas -- has assumed new importance in recent years as developers, architects, and government transportation and city planners have recognized the positive economic, community, and ridership benefits which can be derived from development in close proximity to transit.” - (p. 1)

TRANSIT VILLAGES IN THE 21ST CENTURY / Bernick, Michael; Cervero, Robert – New York: McGraw-Hill, 1997
Book may be purchased via Transit Oriented Development Website:
http://www.transitorienteddevelopment.org/pages/2/
Partial contents: 1) Transit Villages and the Contemporary Metropolis – 2) America's Early Transit Villages – 3) Transit Villages and Public Policy – 4) The Built Environment and the Demand for Transit – 5) Transit-Oriented Development and Travel Choices: Lessons from the San Francisco Bay Area – 6) The Market for Transit Villages – 7) San Francisco Bay Area: Transit's New Urbanism – 8) Washington, D.C.: Post Edge City – 9) Southern California: Transit Villages in the Heartland of the Automobile
Also: HT167 .B48 1997 – *U.C. Berkeley, Environmental Design Library*

TRANSPORTATION ALTERNATIVES IN A CONGESTION PRICING ENVIRONMENT / Cervero, Robert -- Berkeley, CA: U.C. Berkeley, Institute of Urban and Regional Development (IURD); National Transit Access Center, 1992
(U.C. Berkeley IURD - Working paper; no.583)
Report includes bibliographical references.
Available for purchase via the World Wide Web:
http://www-iurd.ced.berkeley.edu/workingpapers_1990-1995.htm

TRANSPORTATION AND JOBS [FACT SHEET] -- [Washington, DC]: Surface Transportation Policy Project (STPP), [2003]
"Fact sheet on Impact of Public Transportation Projects on Job Creation"
Also available via the World Wide Web:
http://www.transact.org/library/factsheets/jobs.asp
Introduction: Transportation policy has a strong, positive relationship with job creation and access. The transportation system should support job creation and grant all people access to good jobs. Unlike past transportation decisions that have focused on short-term solutions and have ignored large sections of the population, modern transportation investments must expand opportunities and improve quality of life.

TRANSPORTATION MANAGEMENT THROUGH PARTNERSHIPS / Dunphy, Robert T.; Lin, Ben C. -- Washington, DC: Urban Land Institute, 1990
Report includes bibliographical references and index
Contents include: Case studies of Baltimore-Washington and Northern / Southern California and summaries of trip reduction ordinances.
Also: HE206.2 .D86 1990 – *U.C. Berkeley, Environmental Design Library*

TRAVEL BY DESIGN: The influence of urban form on travel / Boarnet, Marlon G.; Crane, Randall -- New York, NY: Oxford University Press, 2001
May be purchased via the World Wide Web:
http://www.planning.org/bookservice/description.htm?BCODE=RTBD
Can planners fix our nation's transportation ills through innovative urban design? Using case studies, the authors of this book examine the complex link between urban design and travel behavior. They argue that land-use and urban-design plans can in fact influence travel behavior and demonstrate how people choose neighborhoods according to their preferred mode of travel (i.e., walking, cycling, taking public transportation, or driving). Full of graphs and statistical data, this is a helpful reference for planners, developers, public officials, and others seeking fresh solutions to the gridlock that plagues our cities and towns.

TRYING TO BALANCE JOBS AND HOUSING / Fulton, William; Shigley, Paul -- [Sacramento, CA]: California Journal, 2000
California Journal - Vol. 31, no. 7 (p. 30-35)
Reports on the issue of balancing jobs and affordability of housing in Silicon Valley, CA. Concerns raised by housing advocates and leaders; details on the increase of commerce and employment without construction; focus on inadequate housing; discussion on the median family income in different areas.

UNDERCOUNTING COMMUTERS: Report to the U.S. Census Monitoring Board / Ong, Paul; Ong, Elena SooHoo -- [Suitland, MD?]: U.S. Census Monitoring Board, [2001]
(U.S. Census Monitoring Board; Report no. 07)
Available full text at the World Wide Web:
http://www.worldcatlibraries.org/wcpa/ow/5a9e4db01e409ff0a19afeb4da09e526.html
In: Final Report to Congress of U.S. Census Monitoring Board:
http://govinfo.library.unt.edu/cmb/cmbp/reports/final_report/FinalReport.pdf
This report estimates the undercount of the number of commuters, and how the undercount varies by demographic, economic and geographic characteristics. The commute to work is key to the economy's productivity because it links Americans to the work site, transforming people from being a consumer at their place of residence to producers on the job. The commute to work has profound economic consequences. How workers get to their jobs plays a critical role in defining the extent of traffic congestion that wastes time and contributes to the level of air pollution that affects health. Persons without adequate access to private transportation can be isolated from employment opportunities.

URBAN SPRAWL IN WESTERN EUROPE AND THE UNITED STATES / Richardson, Harry W.; Bae, Chang-Hee Christine -- Burlington, VT: Ashgate, 2004
Monograph includes bibliographical references and index.
See: R. Crane and D. Chatman, "Job Sprawl and the Journey to Work in the USA"
May be purchased via the World Wide Web:
http://www.epinions.com/Urban_Sprawl_in_Western_Europe_and_the_United_States_by_Harry_Ward_Richardson_and_by_Chang_Hee_Christine_Bae/display_~full_specs

URBAN SUSTAINABILITY AS A FUNCTION OF COMPROMISES HOUSEHOLDS MAKE DECIDING WHERE AND HOW TO LIVE: Portland and Seattle compared / Jarvis, Helen -- London, UK: CARFAX Publishing, Taylor and Francis Ltd., 2001
Local Environment, Vol. 6, no. 3, 239-256, 2001
Article may be purchased via World Wide Web:
http://taylorandfrancis.metapress.com/app/home/main.asp?wasp=f016ypytxj5qn6xhdr02
Planners and policy makers in the UK and the USA widely believe that negative attendants of growth, such as congestion, pollution and sprawl, can be stemmed by mixed-use 'urban village' design solutions. It is assumed that concentrating jobs, housing, shops and schools within compact communities reduces individual recourse to energy-consuming movement. This paper critically examines this assumption. It draws on detailed observation of dual-earner household decisions concerning where and how to live, focusing on the two west-coast U.S. cities of Portland and Seattle.

THE WAXING AND WANING OF REGIONAL ECONOMIES: The chicken-egg question of jobs versus people / Partridge, Mark D.; Rickman, Dan S. -- [London, UK]: Elsevier Publishing, 2002
To order reprints of Journal of Urban Economics at EconPapers:
http://econpapers.repec.org/article/eeejuecon/
Journal of Urban Economics - Vol. 53 (2003) p. 76-97
"A central question in urban and regional economies is whether people follow newly created jobs into regions or whether jobs follow newly arrived migrants... "-- (p. 76).

WHERE IS WORKFORCE HOUSING LOCATED?: A study of the geography of housing affordability / Crowe, David, [et al.] -- Washington, DC: National Association of Home Builders, 2004
Co-authored by: David Ledford, Paul Emrath, Elliot Eisenberg and Yingchun Liu
Includes: Case study of Sacramento MSA and affordability for teacher salaries to buy median home in that tract - (p. 6)
Also available for download at the World Wide Web:
http://www.nahb.org/category.aspx?sectionID=784
In a few of the largest U.S. metropolitan areas, virtually all homes are priced beyond the reach of households that rely on the salary of a teacher, police officer, nurse or person in retail sales. More common is a situation where some housing is priced in the range those households could afford, but that housing is restricted to particular sections of the metro area. In most large metro areas, people holding three of the important community infrastructure jobs - police officers, teachers, nurses – can afford homes in less than one-half of the census tracts.

WORKERS AHEAD: THE BALANCE BETWEEN JOBS AND HOUSING IN RIVERSIDE COUNTY / Western Riverside Council of Governments (WRCOG) -- [Riverside, CA]: WRCOG, [2003]
Funded through SCAG (Southern California Association of Governments)
Available full text via the World Wide Web:
http://www.wrcog.cog.ca.us/publications/WORKERSAHEAD2.pdf
The report provides commonly used definitions of jobs to housing imbalance, and examines WRCOG area growth in terms of historical trends that have earmarked growth generally in Southern California for decades. The consequences of these predictable growth patterns have been likewise predictable; the initial lag time involved before jobs follow housing, and the difficulty to provide transportation infrastructure commensurate with growth together result in considerable outbound a.m. Congestion to "jobs-rich" counties, and a reversed commute back home during the evening hours.

WORKFORCE HOUSING: Hometown crisis / Garretson, Con -- Marin, CA: Marin Independent Journal, 2002
Marin Independent Journal - (Jan. 23, 2002)
Special Sections four part series via World Wide Web:
http://extras.marinij.com/special/workforce/
Contents: Part I) Priced out of Marin -- Part II) Housing: Build it or pay -- Part III) The Battle over where -- Part IV) A Search for solutions

WORKFORCE HOUSING REWARD PROGRAM: Notice of Funding Availability and Program Guidelines / California, Department of Housing and Community Development -- [Sacramento, CA]: The Department - Division of Housing Policy Development, 2005
Program Year 2005 (May 2005)
Co-produced by: The Division of Legal Affairs - Jeff Slayton, Contributing staff
Summary: The Workforce Housing Reward (WFH) Program awards grant funds on a per-bedroom basis for each newly constructed residential unit affordable to very low- and low-income households. The WFH Program provides funds for capital asset projects that benefit the community and add to the community's quality of life. - (p. 1)

WORKING FAR FROM HOME: Transportation and welfare reform in the ten big states / Waller, Margy; Hughes, Mark Alan -- Washington, DC: Progressive Policy Institute, 1999
Co-published by: Public/Private Ventures (Philadelphia, PA)
Also available full text via the World Wide Web:
http://www.ppionline.org/documents/far_from_home.pdf
Executive summary: "The blind spot is cars. In most cases, the shortest distance between a poor person and a job is along a line driven in a car. Prosperity in America has always been strongly related to *mobility* and poor people work hard for *access* to opportunities. For both the rural and inner-city poor, access means being able to reach the prosperous suburbs of our booming metropolitan economies, and mobility means having the private automobile necessary for the trip. The most important response to the policy challenge of job access for those leaving welfare is the continued expanded use of cars by low-income workers. Across the country, state and local decision makers are inventing new programs to do just that and devising new ways that public funds can help." – (p. 1)

Selected California Libraries Contact List

California Department of Housing and Community Development
Housing Resource Center - HCD/HRC
1800 Third Street, Rm. 430, Sacramento, CA 95814
(916) 322-9648; mkauffma@hcd.ca.gov

California State Library - General Collection
Library and Courts Building, 914 Capital Mall, Rm. 300
Sacramento, CA 95814 - (916) 654-0261
http://www.library.ca.gov/

California State Library - Government Documents
Library and Courts Building, 914 Capital Mall, Rm. 304
Sacramento, CA 95814 - (916) 654-0069
http://www.library.ca.gov/

UC Berkeley - Environmental Design Library
Moffitt Library, 5th floor, UC Berkeley, 94720
(510) 642-4818; envi@library.berkeley.edu

UC Berkeley - Institute of Government Studies
Library, 109 Moses, UC Berkeley, 94720
(510) 642-1472; http://www.lib.berkeley.edu/