



2015 Annual Indicator Report

June 25, 2015

Executive Summary

2014 Trends

- **Amount of Growth.** Since adoption of the Comprehensive Plan, the number of residential units in the community has grown 2.6% (256 units). At this growth rate, the Growth Management Plan review trigger of 5% growth will be reached in 2018, however the growth rate increased in 2014.
- **Location Growth.** In 2014, 59% of residential units (62 of 105 units) were built in Complete Neighborhoods. This raised the percentage of residential growth in Complete Neighborhoods to 54% (137 of 256 units) since adoption of the Plan. While 54% is short of the community's goal that 60% of growth occurs in Complete Neighborhoods, the recent trend is positive as the percentage of units built in Complete Neighborhoods has grown over the past 4 years.
- **Type of Growth.** The employed local workforce is growing at about the same rate as jobs. However this appears to be a correction in the unemployment rate coming out of the recession because the total workforce is growing at a slower rate than jobs. This means that a greater percentage of local jobs are being held by commuters and/or local workers are each working more jobs. Either way, the community is not providing as many workforce housing opportunities as job opportunities.
- **Other Indicators.** Trends in 2014 also indicate positive, if modest, progress in providing for alternate modes of transportation and conservation of wildlife and scenic resources.

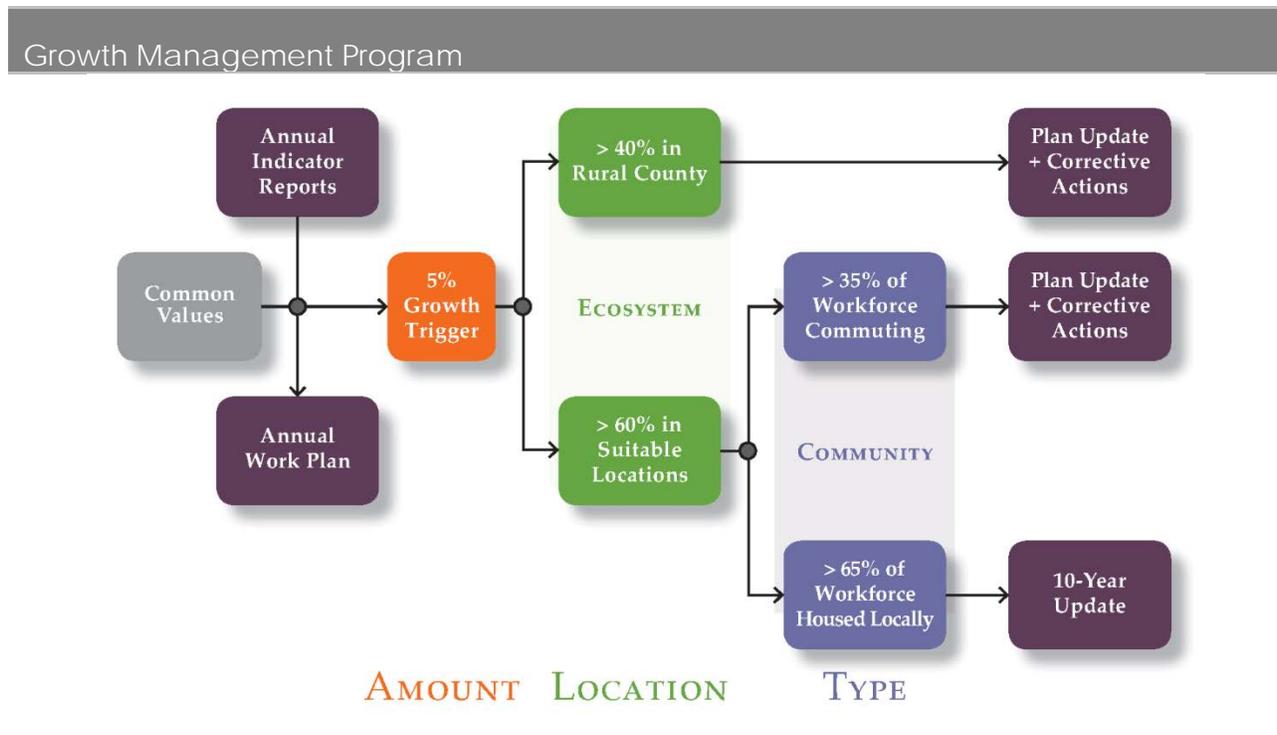
Takeaways

- In order to capture the recent positive trends in location of growth identified above, the community has to shift potential from rural areas to complete neighborhoods and facilitate the right type of development in complete neighborhoods.
 - The County is set up to shift potential through adoption of the rural area LDRs, scheduled for August 4.
 - Once the potential is shifted to complete neighborhoods, the focus will be on the Town's residential zoning efforts to provide for the desired type of growth.
- The community, electeds, and staff cannot effectively participate in more than 3 major efforts at once. The community wants to be engaged. In order to incorporate them in the process we have to be respectful of their capacity to review material and provide the staff capacity in support.
- Private efforts have been successful in providing conservation. Action to facilitate continuation of private conservation are needed, but it is important to note the work done independent of government efforts.
- The market has not been successful in providing the needed workforce housing. The number of employed locals is growing at a slower rate than local jobs. This means we are asking our workforce to work more jobs or commute, but we are not providing workforce housing.

Background

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

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



The table below lists the annual indicators the community considers as part of the annual monitoring of the Comprehensive Plan.

Jackson/Teton County Comprehensive Plan Annual Indicators		
Indicator		Goal
Amount of Growth		
1. Buildout		Less than 1994 levels
2. Growth by Use		Monitor
3. Effective Population		Monitor
4. Annual Vehicle Miles Traveled (VMT) (formerly Traffic Growth)	525 million in 2024; 560 million in 2035	
5. Energy Load		Maintain
6. Annual Monitoring and Implementation		Complete
Location of Growth		
7. Growth by Location	60% Complete Neighborhood – 40% Rural Area	
8. Land Conservation		Increase
9. Redevelopment		Monitor
10. Wildlife Vehicle Collisions		Decrease
Type of Growth		
11. Percentage of Workforce Living Locally		At least 65%
12. Housing Affordability		Monitor
13. Workforce Housing Stock		Monitor
14. Jobs/Housing Balance		Monitor
15. Lodging Occupancy by Season		Increase
16. Employment by Sector		Monitor
17. START Annual Ridership (formerly Population Served by START)	1.8M by 2024; 3.6M by 2035	
17. Active Transportation Mode Share		20% by 2035
18. Major Capital Project Traffic Benchmarks (formerly Percentage of Streets “Complete”)	WY 22: Design at 18,600; Construction at 20,000 WY 390: Design at 18,600; Construction at 20,000 US 26 (Gros Ventre): NEPA Process at 17,200	
19. Level of Service		Monitor

The indicator report is intended to be dynamic to provide the community with the best available analysis of the implementation of our goals. In the first years of the indicator report the focus has been on refining our methodology for the indicators identified in the Comp Plan.

This year, replacement transportation indicators are proposed consistent with Policy 9.2.a of the Comp Plan that indicators be: relevant to the policies of the Comp Plan, reliably accessible annually, and understandable to the community. A public review draft of the Integrated Transportation Plan (ITP) was released in May and will be considered for adoption in July. The ITP proposes new measures for the amount of traffic, measuring the START ridership and active transportation, and how to monitor capital project need. How each of the indicators proposed in the ITP is more relevant to the policies of the Comp Plan is discussed in more detail in the section for the indicator below.

Amount of Growth

1. Buildout

Buildout is the total amount of development allowed on a property. It is an indicator of how much growth the community is going to allow. Buildout is a function of zoning and other development restrictions. As a result, the only way to change buildout is through a zone change or deed restriction on the development of a property. Such deed restrictions most often take the form of a conservation easement or sale of land to a Federal land manager. The table below shows the changes in buildout that have occurred since adoption of the Comprehensive Plan.

Changes in Buildout			
Year	Residential Units	Lodging Units	Nonresidential Floor Area
1994-2011	-564	?	?
Comp Plan Vision: 2012 Forward	± 0	+ 700-2,300	+ 2.2M – 5.2M
2012	-31	0	0
2013	-12	0	0
2014	-14	0	0
2012-2014	-57		

Source: Teton County and Town of Jackson

The goal in the Comprehensive Plan is to keep buildout at or below the level, “allowed and planned for since 1994,” (Policy 3.1.a). In 2012 the amount of growth allowed and planned for was thought to be roughly a doubling of the residential and nonresidential development on the ground. Since 2012 the community has discovered that our accounting of the amount of existing development in 2012 was low. This means that while the buildout calculations have not changed, our understanding of what those buildout numbers mean has. The Comp Plan Vision represented in the table above represents staff’s interpretation that Policy 3.1.a of the Comp Plan is meant to limit growth to a rough doubling.

The above analysis is also the first year in which lodging units and nonresidential floor area have been included in the buildout monitoring. This has become a topic of conversation through the LDR updates and so staff will monitor these changes moving forward. Looking backward, staff will have to do more research to understand the trends. Since 2012 there have been a number of conservation easements in rural areas of the County to effect buildout, but not much else. Recent zoning and LDR changes in the Town of Jackson are not reflected in this table because they did not become effective until 2015. They will appear in next year’s indicator report along with the results of the rural area and Downtown LDR updates.

Buildout Takeaways:

- Next year this will be a critical indicator of the coordination of rural area and downtown efforts to cooperatively implement the Comprehensive Plan.

2. Amount of Growth by Use

Residential growth is the trigger of the Growth Management Program. Once the community has grown 5% from the number of residential units that existed at the time of Comprehensive Plan adoption, the Growth Management Program review is required, which could result in corrective action if targets are not being met. Guesthouses and lodging units are not counted as residential units. Units that are dual permitted to be used as either residential units or short-term rentals are counted as residential units for the purpose of measuring growth. This counting of short-term rental units as residential units is a function of the methodology of the buildout analyses that informed the Comprehensive Plan. In recent conversations about growth and buildout the community has expressed a desire to talk about lodging units as a separate category from residential and non-residential. As a result, future indicator reports will need to reevaluate the classification of short-term rental units, but this report continues to use the past methodology.

Growth by Use						
Use	Existing 1/1/12	Growth Since 1/1/12	2014 Growth	2013 Growth	2012 Growth	
Non-Residential Floor Area						
Agriculture	1,019,446	0.4%	3,945	0	0	
Outdoor Recreation	338,135	7.2%	1,436	23,039	0	
Restaurant/Bar	408,470	1.2%	3,031	2,003	0	
Office	1,267,425	1.3%	-524	3,539	13,606	
Retail	1,582,368	4.8%	59,987	16,032	0	
Industrial	1,417,546	3.9%	43,559	-1,932	12,951	
Institutional	1,931,522	2.2%	9,584	2,503	30,108	
Non-Residential Floor Area	7,964,912	2.8%	162,725	45,598	75,564	
Residential Units						
Agriculture	211	0.9%	2	0	0	
Detached Single Family Dwelling	5,917	2.9%	54	57	61	
Attached Single Family Dwelling	1,853	2.2%	14	12	15	
Apartment	1,541	2.7%	35	2	4	
Mobile Home	348	0.0%	0	0	0	
Residential Units	9,870	2.6%	105	71	80	
Guesthouse	758	4.9%	11	15	11	
Lodging Units						
Conventional Lodging Units	5,875	0.5%	0	0	29	
Lodging Units	5,875	0.5%	0	0	29	

Source: Teton County and Town of Jackson

Residential growth in 2014 grew from 2012 and 2013. Residential growth since 2012 Comp Plan has been 2.6%. If the community continues to grow at this rate, the Growth Management Program review

can be expected in 2018, however if 2014 increases in growth continue it may be sooner. Detached single-family homes continue to be the most common residential unit type, although a number of apartment units, which typically come in bunches, were built in 2014.

Nonresidential growth in 2014 also increased. Non-residential growth continues to be inconsistent from year-to-year, but balanced in the long-term. As a whole, and by individual use, non-residential growth trends are sensitive to large projects, resulting in peaks and valleys in the trend data. However, over the long-term no one use consistently grows at a greater pace than the others; which is a positive indicator of achievement of the community's desired balance among uses. Nonresidential growth as a whole also remains consistent with residential growth. If there is any use that is growing at a slower rate it is lodging.

Growth by Use Takeaways:

- The Growth Management Plan review can be expected in 2018, or sooner if residential growth continues to increase.
- Residential and nonresidential growth since adoption of the Comp Plan has been balanced, with lodging growth lagging behind.

3. Effective Population

Effective population indicates the true impact on community facilities, taking into account not only permanent residents, but also commuters, seasonal residents, seasonal workers, and visitors. This calculation is largely a function of other indicators in this report, but it illustrates their cumulative impact.

In 2013 the Conservation Alliance updated their 1992 Effective Population Study and reported the results. The methodology they developed has been reviewed by staff and will be used as a framework moving forward. However, staff is still working on modifications to align the data sources with the sources used for other indicators to maintain consistency. As a result the numbers below continue to represent the Alliance's 2013 findings. Future reports will have modified numbers and include trends.

2012 Effective Population				
	February	April	July	November
Permanent Residents	21,675	21,675	21,675	21,675
Daily Commuters	3,809	3,809	3,809	3,809
Seasonal Residents	4,047	1,212	5,858	1,145
Seasonal Workers	1,327	204	5,066	343
Visitors	9,108	2,731	23,874	2,577
Effective Population	39,966	29,631	60,282	29,549

Source: Jackson Hole Conservation Alliance

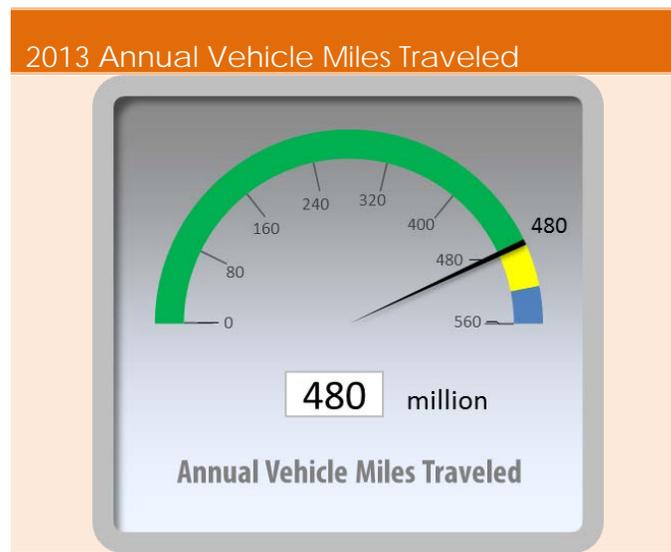
Effective Population Takeaways:

- Future effective population reports will illustrate the relationship of different types of residential and lodging growth.

4. Vehicle Miles Traveled (formerly Traffic Growth)

The draft Integrated Transportation Plan (ITP) recommends annual vehicle miles traveled (VMT) as a better metric of traffic growth than just traffic counts. Vehicle Miles Traveled is a better metric of the overall transportation impact because it models traffic between traffic count stations instead of just showing a snapshot at a single station to give us a sense of the communities overall traffic impact. Even at the time of adoption of the Comp Plan staff was aware that VMT was a better indicator than traffic counts, but it was not until development of the Integrated Transportation Plan that a replicable method for calculating annual VMT was available.

This indicator, along with the other traffic indicators, will be displayed in the “ITP Dashboard” on www.jacksontetonplan.com. This dashboard display provides any easy visual reference for how the community is doing relative to our 2024 (represented by the yellow) and 2035 (represented by the blue) goals set in the Integrated Transportation Plan. Below is the 2013 display for Annual VMT, which is the baseline that will be used in future years to evaluate implementation of the Integrated Transportation Plan.



Sources: ITP Dashboard, WyDOT

As discussed in more detail in the ITP, a “no policy change” scenario based on projection of current trends would result in annual VMT of 550 million in 2024 and 610 million in 2035. As depicted above the ITP goals are 525 million VMT in 2024 and 560 million in 2035. The community’s trend in meeting these goals will be tracked in future years as the ITP is implemented.

In addition to total annual vehicle miles traveled, the ITP Dashboard also includes average daily summer VMT per capita. This is a measure of the amount of traffic on our transportation system on an

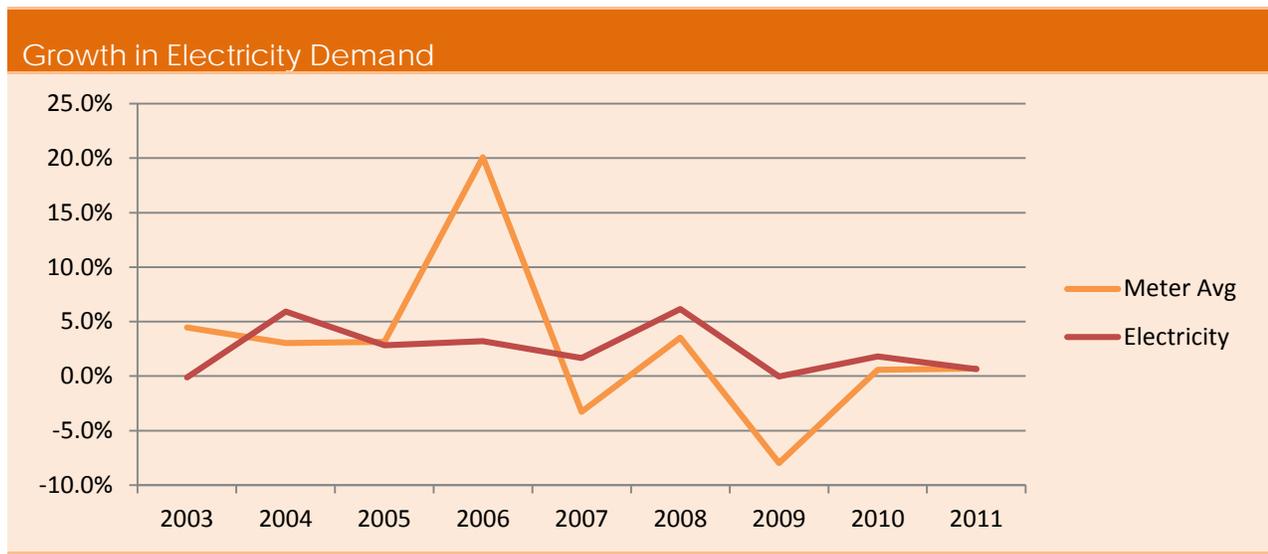
average summer day per person in the community. It is a function of VMT for the months of June, July, August, and September and the effective population for those same months. For 2013 we believe the summer average daily VMT per capita to be 34 miles. The trend of this number over time will indicate the relationship of transportation initiatives to overall growth.

Vehicle Miles Traveled Takeaways:

- In order to reduce VMT growth from about 1.5% per year down to 1% per year the ITP must be adopted.
- Future years’ data will indicate if we are successfully meeting the ITP goals

5. Energy Load

The goal of the Comprehensive Plan is to maintain the community’s overall energy load as we grow. This requires each energy user to reduce their use as more users are added to the community.



Source: Lower Valley Energy

The most recent data available from Lower Valley Energy is through 2011. The table above shows growth in electricity demand. Electricity growth of 0% is the Comprehensive Plan goal. Meter average represents the average number of active meters for the year. The growth in electricity demand from 2004 through 2008 was a steady 3 - 6%. However, from 2009 to 2011 electricity growth has been minimal. This time period coincides with the increase in awareness and action by the community with regard to energy conservation and may bode well for the implementation of the Comprehensive Plan policies. However 2009-2011 also coincided with a decline in users, which may have more to do with the lack of energy consumption than conservation efforts.

Energy Load Takeaways:

- Energy growth stalled around the time of the 10x10 initiative and other community efforts to conserve energy.

- Future years' data will indicate if we are conserving energy, or if the lack of energy growth was a result of a decrease in users due to the recession

6. Annual Monitoring and Implementation

The purpose of this indicator is to ensure that time and resources are being dedicated to implementation of the Comprehensive Plan. If the annual indicator report and work plan are not being completed it may be an indication that growth is occurring at too rapid a pace to complete necessary long-range planning work. This year's indicator report and annual work plan are being released later than anticipated by the Comprehensive Plan. This does not indicate too much development but it does indicate too many planning assignments. A new Associate Long-Range Planner will help with this in the future, but it is still important to note that monitoring and coordination suffer when we try to do too much at once.

This year's Indicator Report improves upon last year's with revisions to the transportation indicators based on the Integrated Transportation Plan. In the next year, staff anticipates improvements to the housing indicators and data collection coming out of the Housing Action Plan. Staff would still also like to add geographic analysis and incorporate projections into the report. Below, is the list of tasks that were included in the FY14-15 Implementation Work Plan for July 1, 2014 and June 30, 2015. An analysis of the progress follows the table.

Review of FY 14-15 Implementation Work Plan		
Task	% Complete	Progress
Land Development Regulation Update		
Restructure and Administration Update	100%	<ul style="list-style-type: none"> • Adopted by County October 2014 • Adopted by Town November 2014 • Effective January 1, 2015
Rural Area Amendments	90%	<ul style="list-style-type: none"> • PC recommendation May 18, 2015 • BCC direction June 15, 2015 • Final draft anticipated July 10, 2015 • Consideration of adoption August 4, 2015
Downtown/LO Amendments	80%	<ul style="list-style-type: none"> • PC Recommendation February 4, 2015 • TC direction anticipated July 2015 • Final draft anticipated August 2015 • Adoption anticipated in fall 2015
District 3 Amendments	0%	<ul style="list-style-type: none"> • To begin upon adoption of Downtown/LO
NRO/EA Amendments	0%	<ul style="list-style-type: none"> • To begin upon adoption of Rural
Housing Amendments	0%	<ul style="list-style-type: none"> • To begin upon completion of Housing Plan

Review of FY 14-15 Implementation Work Plan		
Task	% Complete	Progress
Coordination on Comprehensive Plan Implementation		
Focal Species Identification	100%	<ul style="list-style-type: none"> • Anticipated completion in June 2014
Cumulative Impact Study	10%	<ul style="list-style-type: none"> • To be wrapped into NRO/EA Amendments
Housing Action Plan	70%	<ul style="list-style-type: none"> • Housing Summit held May 2015 • Draft anticipated July 2015 • Adoption anticipated fall 2015
Integrated Transportation Plan	95%	<ul style="list-style-type: none"> • Consideration of adoption July 6, 2015
Complete Streets Plan (not adopted in work plan)	95%	<ul style="list-style-type: none"> • Draft released in March 2015 • Consideration of adoption in August 2015
Regional Coordination	100%	<ul style="list-style-type: none"> • Completed participation in HUD grant
Other Comp Plan Work	Annual	<ul style="list-style-type: none"> • Town and County retreat and goal setting • Presentations to students
Comprehensive Plan Administration		
2014 Annual Indicator Report and Work Plan	100%	<ul style="list-style-type: none"> • 2015 Indicator Report released in June 2015 • FY 15-16 Work Plan released in June 2015
Provide Data to Departments/Organizations		
Standardize Data	25%	<ul style="list-style-type: none"> • Completion anticipated by end of 2015
Provide Data to Others	Annual	<ul style="list-style-type: none"> • 22 in 21, Rich Ochs, other various

The restructure of the LDRs and update of the LDR administrative procedures was completed in 2014, it was a task that ended up requiring far greater resources than anticipated, which in-turn delayed completion of many other tasks. But, it was an effort that was much needed and will facilitate future LDR updates. The focal species identification study and Town Community Streets Plan will also be complete by the end of FY 15-16. Meanwhile, the Integrated Transportation Plan, Housing Action Plan, Rural LDRs, and Downtown LDRs are in their final stages and should all be adopted by the end of 2015. Completion of these tasks will represent completion of the FY 12-13 Work Plan.

As discussed in last year's indicator report, the principle cause for lack of project completion is quantity of projects assigned. Staff's conclusion is that only 3 major Town and County efforts can be digested by the community at a single time. A crucially important aspect of any effort is momentum. When an effort stops and restarts all of the education and outreach from the beginning of the project is lost and has to be regained. This is difficult on decision makers and disenfranchises the public. Our past efforts to hire consultants to provide more capacity have been unsuccessful because of the public engagement culture of the community. Momentum has to be communitywide; adding consultant capacity can increase the amount of content released, but it does not alter the public desire for detailed understanding and vetting of that content. As a result, the limiting factor is the amount of content the public can review, not the amount of content staff and consultants can produce. The engagement of our community is an asset that comes with a clear expectation for involvement that demands time and focus.

Annual Monitoring and Implementation Takeaways:

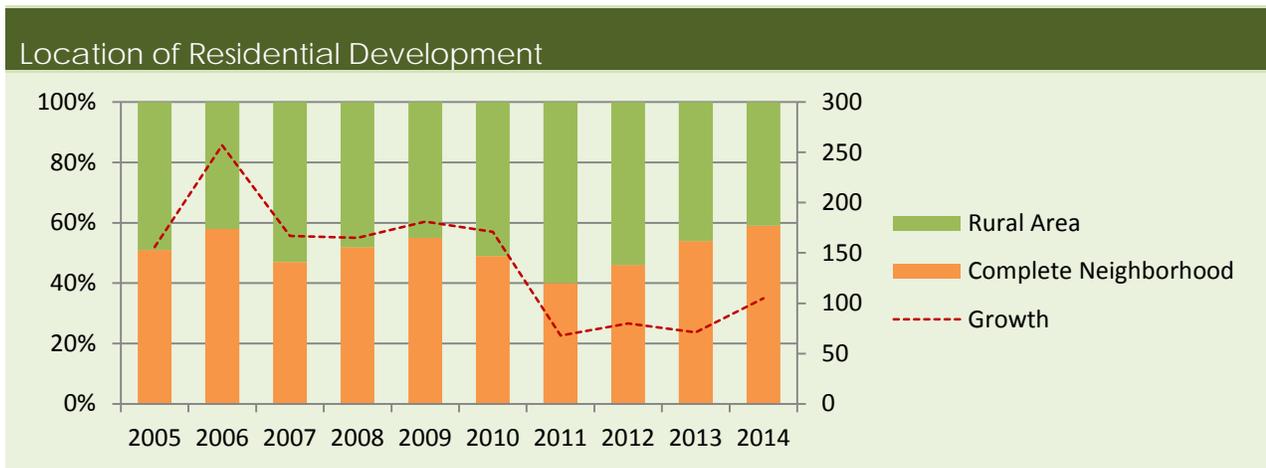
- Efforts are most successful when completed in a 12-month timeframe with continuity of process that builds communitywide momentum.
- The community’s public process expectations and demand for customized products is the limiting factor.
- The community and electeds can only handle 3 efforts at one time.

Location of Growth

7. Location of Growth

The location of growth – in complete neighborhoods or rural areas – is the first target of the Growth Management Program. The goal is for 60% of growth to occur in Complete Neighborhoods. In 2014, 59% of growth occurred in Complete Neighborhoods, thanks to a few large projects in the Town. Since the adoption of the Comprehensive Plan, 54% of residential growth has occurred in Complete Neighborhoods.

The 3 year trend of location of growth has been positive. In 2013 a large number of units in Teton Village were produced, in 2014 it was Midtown and West Jackson units that came online. Unfortunately the longer-term trend in location of growth is one of peaks and dips with complete neighborhood units at greatest proportion in times of increased building activity. This may bode well in the short-term as we are in the midst of an increase in residential construction, however rural area growth has always rebounded in the past. Still, if the Growth Management Program were reviewed today, the community would not meet its target. To maintain the success of the recent past, development in complete neighborhoods must be allowed and facilitated. The type of growth desired by the community in locations desired by the community needs to be easy to permit. If merely allowing increased development in complete neighborhoods doesn’t accomplish our goals, the community may also consider managing rural growth in the short-term.



Source: Teton County and Town of Jackson Building Permits

Long-term success in shifting the location of residential growth remains dependent on shifting entitlements. As discussed in the first indicator, we have not adopted any amendments to the LDRs to significantly shift entitlements. As a result, the location of potential units has remained consistent with pre-Comp Plan levels. With a constant or declining residential buildout, (see Indicator 1)

Definition of Potential		
Potential	=	Buildout - Built
		(LDRs applied to all parcels as if vacant) (What is actually on the ground)

potential will drop as units get built (see definition of potential in callout box). If there is not a shift in the location of potential any short-term success in the location of development will lead to an increase in the proportion of potential in rural areas and the community should expect that in the long-term only 36% of growth will occur in complete neighborhoods.



Source: Teton County and Town of Jackson

Location of Growth Takeaways: (unchanged from 2014 Report)

- No LDRs have been adopted since adoption of the Comp Plan to facilitate success of this indicator and yet the trend is positive, likely due to recession declines in rural area growth.
- Desired growth in appropriate areas must be facilitated if the community is going to meet its target.
- If growth in complete neighborhoods is not occurring, growth in rural areas may need to be managed.

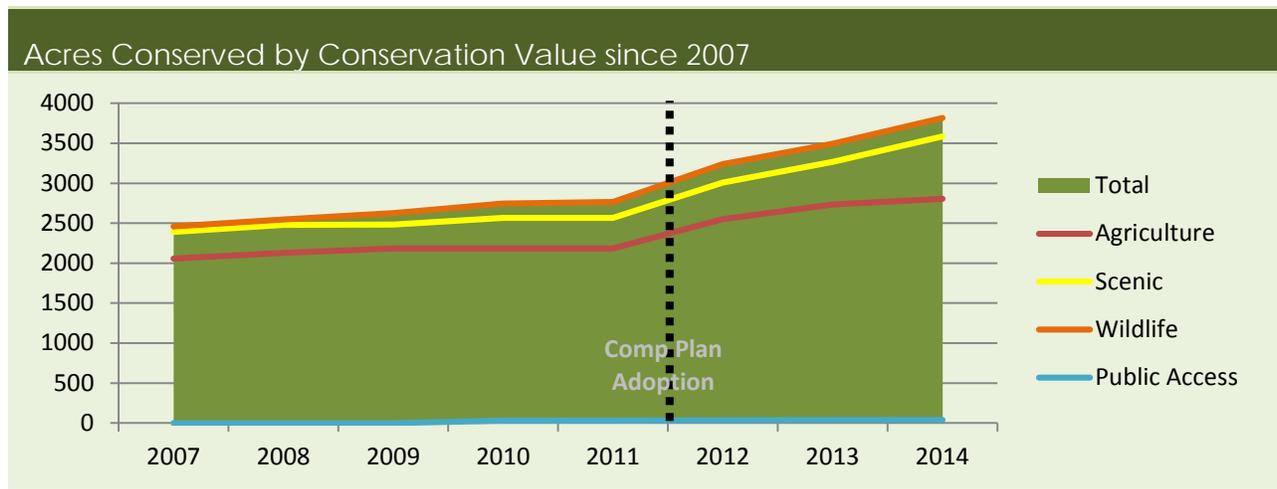
8. Permanently Conserved Land

Monitoring permanently conserved land is an indicator of the community’s progress in preserving areas of wildlife habitat, natural resources, scenic resources, and agricultural character. The goal of the Comprehensive Plan is to increase such conservation. In 2014, 322 acres of land were conserved through 7 easements; bringing the total land area under conservation easement to about 23,035 acres, or 30% of the private land. Notable conservation has occurred in the first half of 2015 as well, but that work will not be included in this report until next year.



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

The amount of conservation from year-to-year can be greatly impacted by a single project as is evident by the jump of conservation in 2007 because of one big project, Shooting Star. It is also not surprising that the amount of conservation follows general economic trends. Conservation incentives, whether tax incentives or development quid-pro-quos, are most appealing in a bullish market. In addition to macroeconomic circumstances, some of the decrease in 2008-2011 may be attributable to 2 moratoria, one from 2008-2010 and another from 2013-2014, that have been put in place to prohibit large conservation development (PRD) projects. However, large PRD projects were not being developed prior to 2008. More concerning from a Comp Plan implementation perspective has been the recent decline in non-subdivision PRDs that cannot be attributed to the moratoria. Improving the conservation incentives so that they provide more and better projects is a goal of the rural area LDR updates, which will be considered for adoption on August 4, 2015.



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

Yet, it is important to note the continued growth in the amount of land conserved and the continued preservation of wildlife values in almost every easement. Even as the community works to improve our conservation, since the Comp Plan was adopted in 2012 over 1,000 acres have been conserved. There

have been no policy efforts to cause this progress, but the community has worked on its own to achieve this common value.

Permanent Conservation Takeaways:

- The goal of rural zoning should be to create and modify tools to increase the quantity and quality of conservation easements
- The conservation community is implementing the Comp Plan through their own efforts

9. Redevelopment vs. New Construction

The goal of the Comprehensive Plan is to develop the most appropriate places for development (Complete Neighborhoods) into the most desirable places to live. In addition to looking at the location of new growth, the community also wants to monitor the amount of redevelopment that is occurring. Staff is still working on the best way to measure this indicator. Future reports will include analysis of development of previously vacant sites versus already developed sites. However, minor remodels and other construction activities that do not require a building permit will always be difficult to include in any analysis.

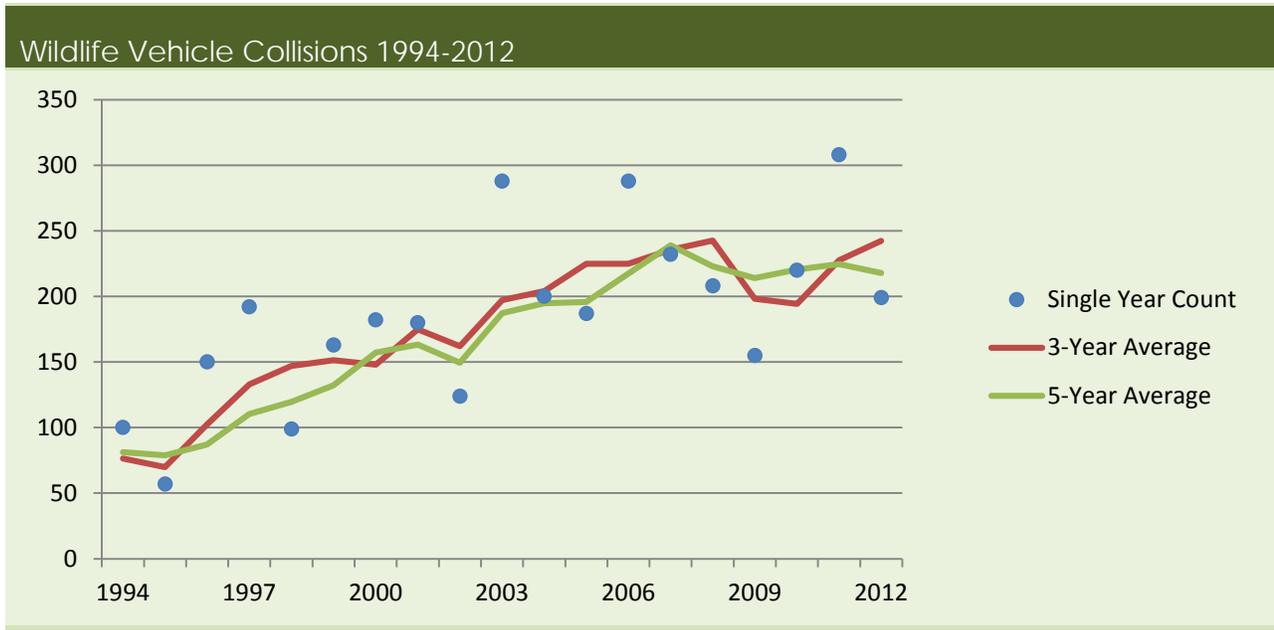
Redevelopment Takeaways:

- As data collection is refined and new policies are put in place this indicator will be an important measure of whether redevelopment in Town is being achieved and for what purpose.
- It will also be an indicator of the workforce housing implications from additions and remodels.

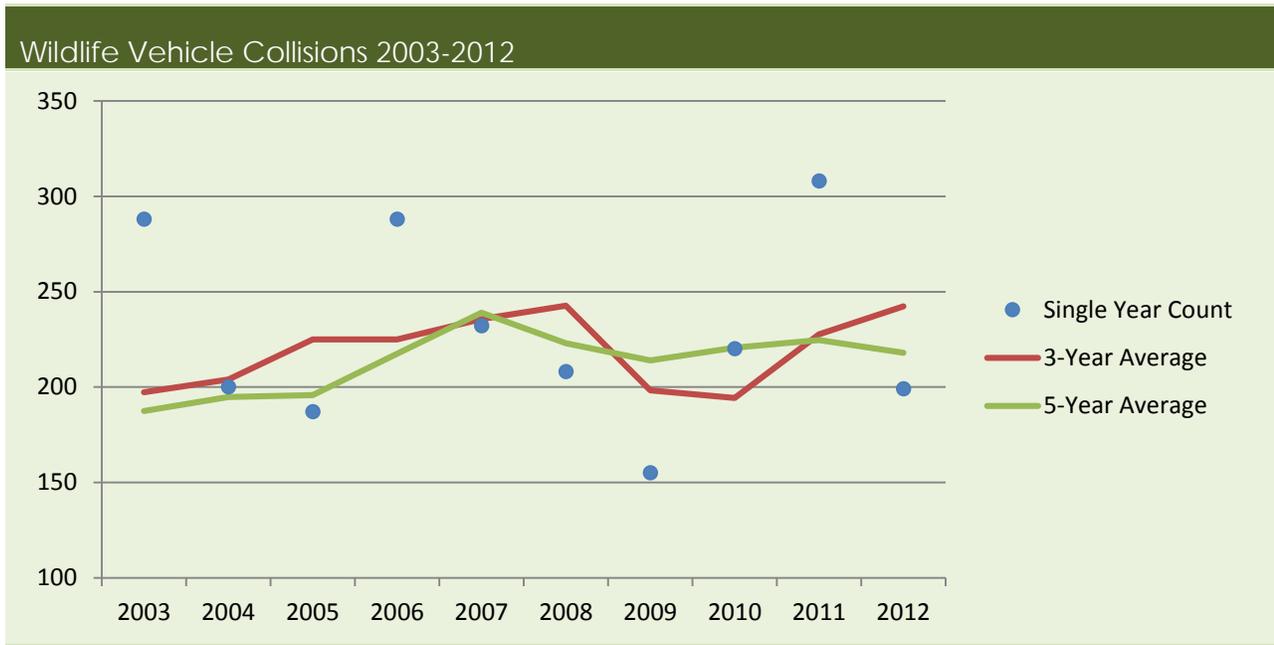
10. Wildlife Vehicle Collisions

Wildlife vehicle collisions are an indicator of the location of growth and transportation infrastructure relative to wildlife movement. The goal in the Comprehensive Plan is to reduce wildlife vehicle collisions. At this point, the data available only allows for looking backwards at conditions that existed prior to adoption of the Comprehensive Plan. The success of efforts to reduce collisions will be judged in future reports. Wildlife vehicle collisions are also included in the Integrated Transportation Plan (ITP) Dashboard.

Year-to-year variation in the number of wildlife vehicle collisions is high as indicated by the scatter of the individual years' numbers in the graph below. The data is heavily biased toward large ungulates because they are easy to see and WYDOT cleans up their carcasses. The variability from year-to-year is highly correlated to winter conditions; in more difficult winters ungulates are confined to areas nearer roads. The Jackson Hole Wildlife Foundation, who supplied the data, suggests looking at an average of the previous 3 to 5 year to get a better sense of the trend. Some of the increase indicated by the data may be due to the increase in people and groups observing and documenting wildlife vehicle collisions, but the bulk of the dataset has always been from WYDOT and duplicate reports are consolidated, always saving the WYDOT data, so the effect of increased monitoring can be controlled.



Source: Jackson Hole Wildlife Foundation



Source: Jackson Hole Wildlife Foundation

Both the 3-year and 5-year averages indicate a steady increase in the number of wildlife vehicle collisions over the past 20 years. However, in the past ten years the growth in wildlife vehicle collisions seems to have slowed. There is still a trend of growth, but it is less rapid. Looking at elk, moose, and mule deer individually shows the same trend. No species has fared relatively better or worse than the others. That said, the smaller the population, the greater the impact of each collision, as is the case for moose.

Wildlife Vehicle Collisions Takeaways:

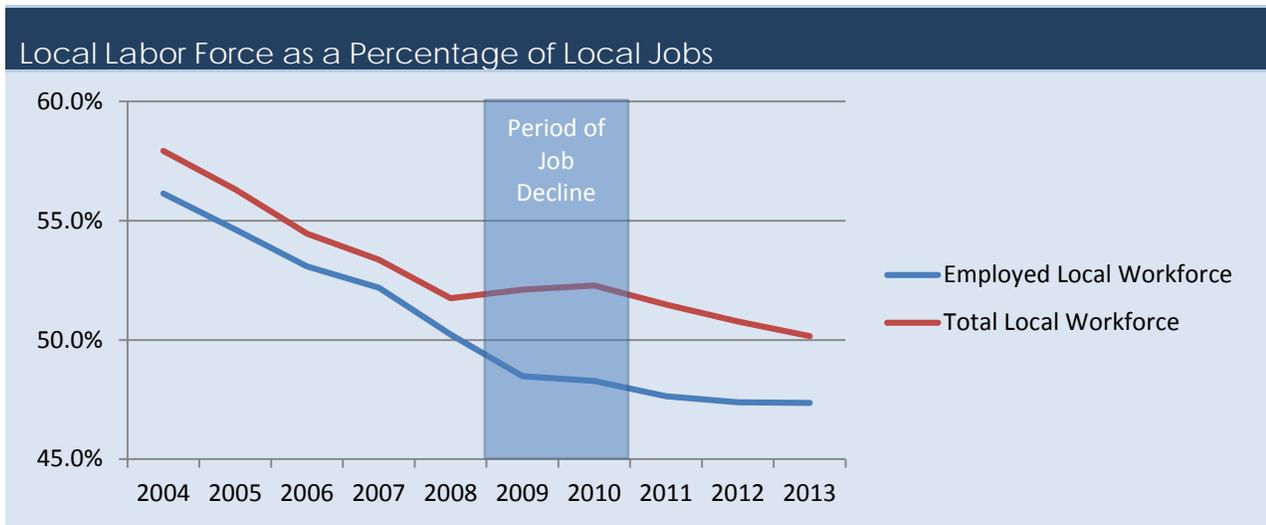
- Future indicator reports should compare the wildlife vehicle collision data with other growth data to determine any correlations that could inform growth policies.
- Efforts to facilitate wildlife crossings could also reduce wildlife vehicle collisions.

Type of Growth

11. Local Workforce Percentage

The percentage of the workforce living locally is the Growth Management Plan target indicating the desired type of growth. It represents a jobs/housing balance in line with our community growth management goals as well as maintenance of our “community first, resort second” character. The Comprehensive Plan goal is to ensure at least 65% of the workforce lives locally. When the community first identified loss of a local workforce as an issue in the early 90s over 85% of the workforce lived locally.

Without a reliable method for measuring this indicator, Staff turned to a proxy indicator in the 2014 Indicator Report: the ratio of the local labor force to local jobs. These numbers alone cannot be used to calculate this indicator, but the trend they show will mirror the trend for this indicator and suggest whether action is needed to ensure the community is providing adequate workforce housing opportunities to meet our Comprehensive Plan goals.



Source: US Bureau of Labor Statistics; US Bureau of Economic Analysis

The chart above shows that the ratio of local workforce to local jobs has declined steadily over the past 10 years. The decline in employed local workforce actually accelerated with the recession. This trend indicates that it was not commuters who lost their jobs in the recession, but people living locally. As the number of jobs began to rebound in 2011, the total local workforce began to fall again relative to the number of jobs, but the employed workforce has leveled out relative to the number of jobs, meeting the

community's goal to maintain the percentage of the workforce that lives locally. This would indicate that unemployed members of the local workforce who never moved away are filling new jobs. It also indicates to staff that once the unemployment rate stabilizes, the community should expect the employed local workforce to be falling in parallel with the total local workforce as it did from 2004-2008.

This proxy indicator has two possible implications, neither of which suggests that the status quo is providing adequate workforce housing opportunities. Either the percentage of the workforce living locally is going down, and has been steadily going down since 2004, or the number of jobs per employee has steadily gone up. If both the 2007 Needs Assessment and 2013 Nexus Study surveys are correct, up to half of the employed local workforce had to take on an extra job to continue to live here. The actual answer is likely some unquantifiable combination of these two factors, which is why the actual indicator cannot be reported. However, the takeaway is the same: workforce housing is not being provided in balance with the jobs that are being created.

In the last year the US Census Bureau has developed a tool that compares employment and census data sets at a greater level of detail than is possible for the general public (only grouped data is reported publicly to protect anonymity) and may solve the variables that make this indicator so difficult to report. At this point the information available is only through 2011 and staff is still evaluating the information against other trends and surveys to see if it is appropriate for use in tracking this indicator.

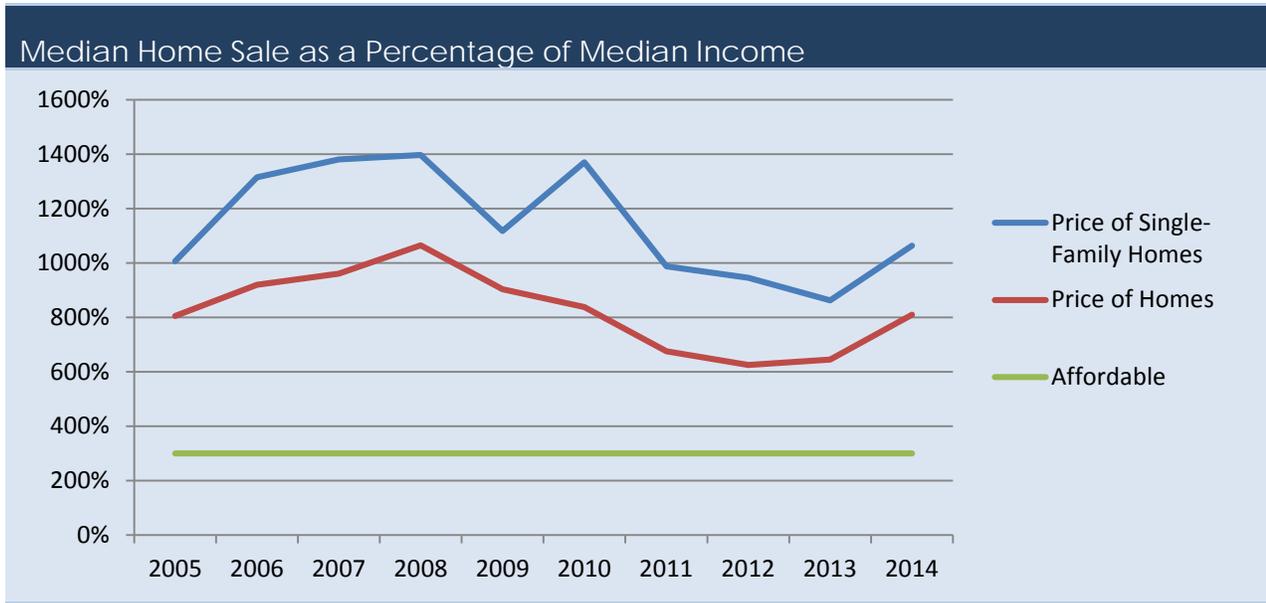
Local Workforce Percentage Takeaways:

- The Comprehensive Plan principle is to maintain a diverse population by providing adequate workforce housing opportunities. If the community is meeting its workforce housing goals it is a result of employees working multiple jobs in order to afford housing, not the provision of workforce housing opportunities.

12. Affordability of Housing

Housing affordability has long been considered a primary reason for the loss of the local workforce. The community monitors this indicator to understand the relationship. The median home sale as reported by the Teton County Assessor in 2014 was 810% of median family income (\$90,700). The median single-family home sale as reported by David Viehman in the, "Jackson Hole Report," was 1,064% of median family income. A home sale that is 300% of income is considered affordable based on US Department of Housing and Urban Development (HUD) standards. This means that the median home sold in 2014 was only affordable to a family making nearly three times the median income.

As discussed in past indicator reports, housing affordability improved with the national housing market crash, however this correction did not make housing affordable. Housing prices decreased from 3 – 4 times what is considered affordable, to maybe 2 times. Trends would indicate that the market is now returning to pre-recession levels of affordability. In 2014 rising home prices combined with a decrease in median family income to show a steep increase in the ratio of price to income (decrease in affordability). While staff does not anticipate the steepness of the 2013-2014 trend to continue, staff does anticipate that housing will continue to grow less affordable in coming years.



Sources: HUD, Teton County Assessor, David Viehman

Housing Affordability Takeaways:

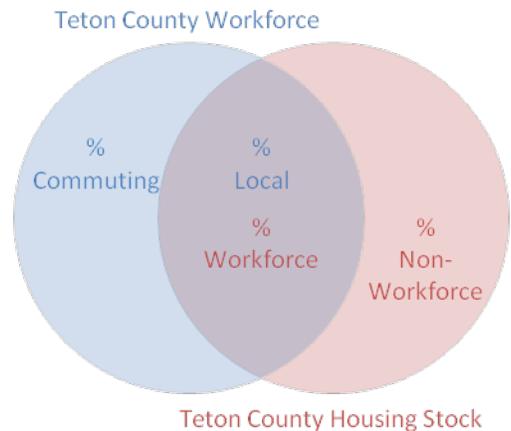
- Housing affordability improved with the recession, but housing did not become affordable.
- The improvement in housing affordability has halted, future indicator reports will show how steeply housing affordability will decline.

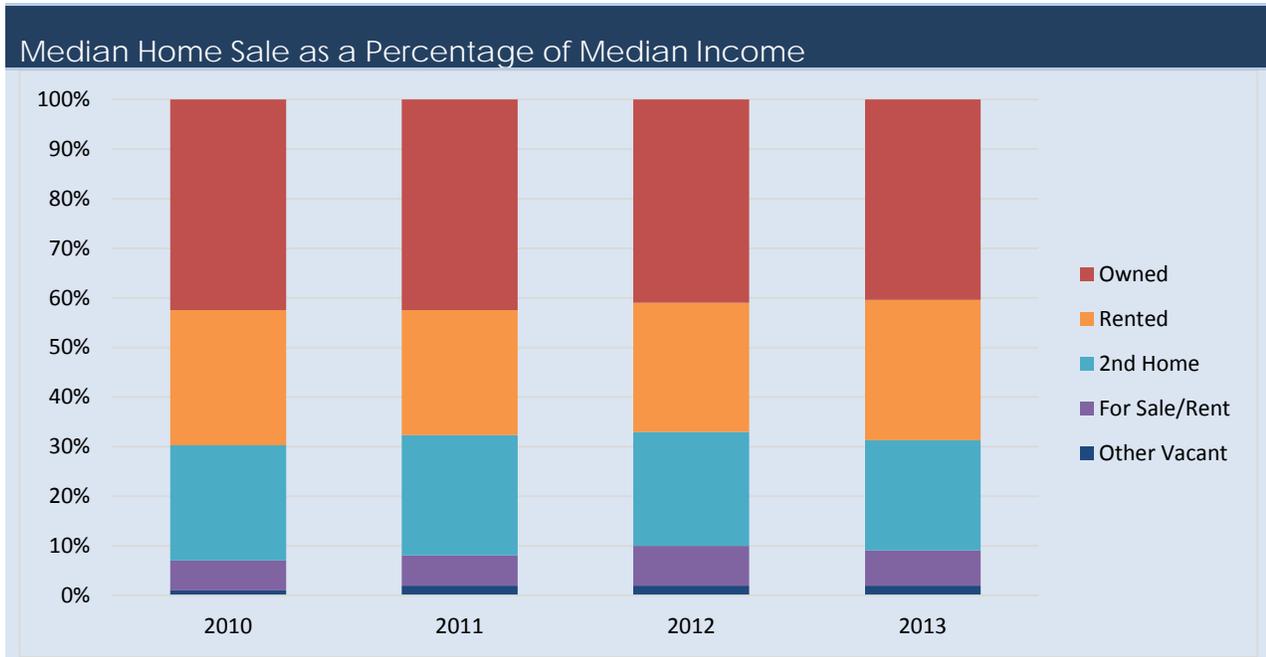
13. Workforce Housing Stock

The percentage of the housing stock occupied by the workforce is different from the percentage of the workforce living locally. Understanding the percentage of the housing stock that is occupied by the workforce is an important indicator of the type of units that are being developed and whether they are housing the workforce.

Tracking the occupancy of residential units requires data or estimates on the occupants of units. The best annual source of this information is the American Community Survey completed by the US Census Bureau.

Staff is still developing a methodology for determining the percentage of occupied units occupied by the workforce. However, we can look at the trend for occupied versus vacant units and note that the proportion of the housing stock made up of second homes has remained constant. This cannot be attributed to any new policy effort to implement the Comprehensive Plan, but is a positive trend nonetheless.





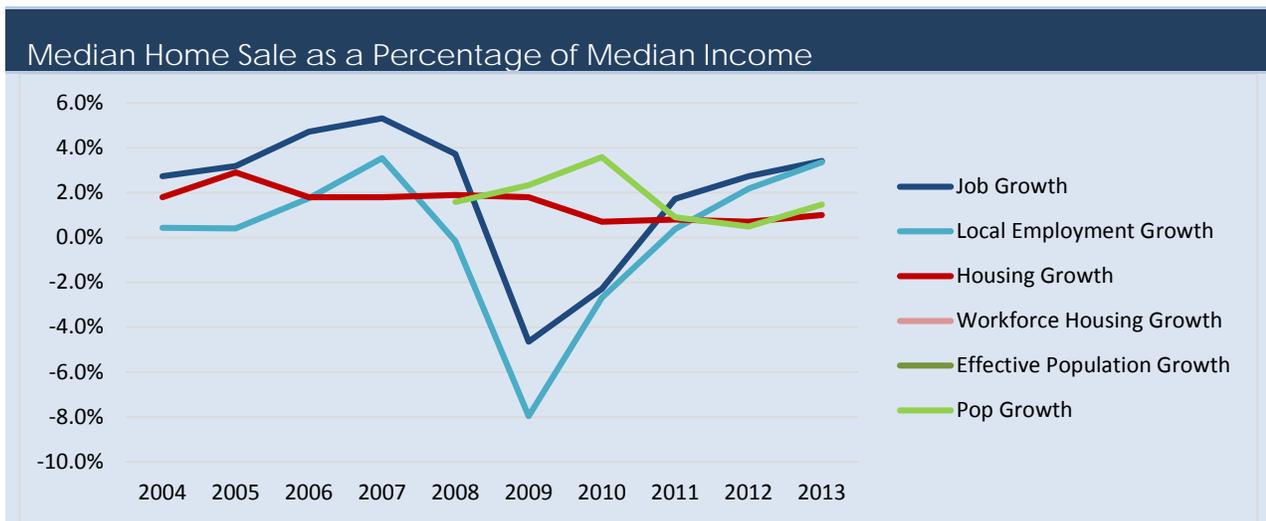
Source: American Community Survey

Workforce Housing Stock Takeaways:

- Vacancy and second home rates have remained constant since 2010.
- Staff will work on improving measurement of this statistic to better understand trends in residential unit occupancy.

14. Jobs, Housing Balance

The purpose of the Balance indicator is to look at various other indicators side-by-side. Staff is still developing a methodology for this indicator is limited by available data to trends that mostly pre-date adoption of the Comprehensive Plan.



Source: American Community Survey

As discussed in early indicators, methodologies for quantifying the amount of workforce housing and the effective population are still being refined. What the limited data does indicate is that population and housing growth are less volatile than job and employment growth. The data also show that housing growth and permanent population growth are pretty consistent. This confirms the trend of a constant second home ownership rate.

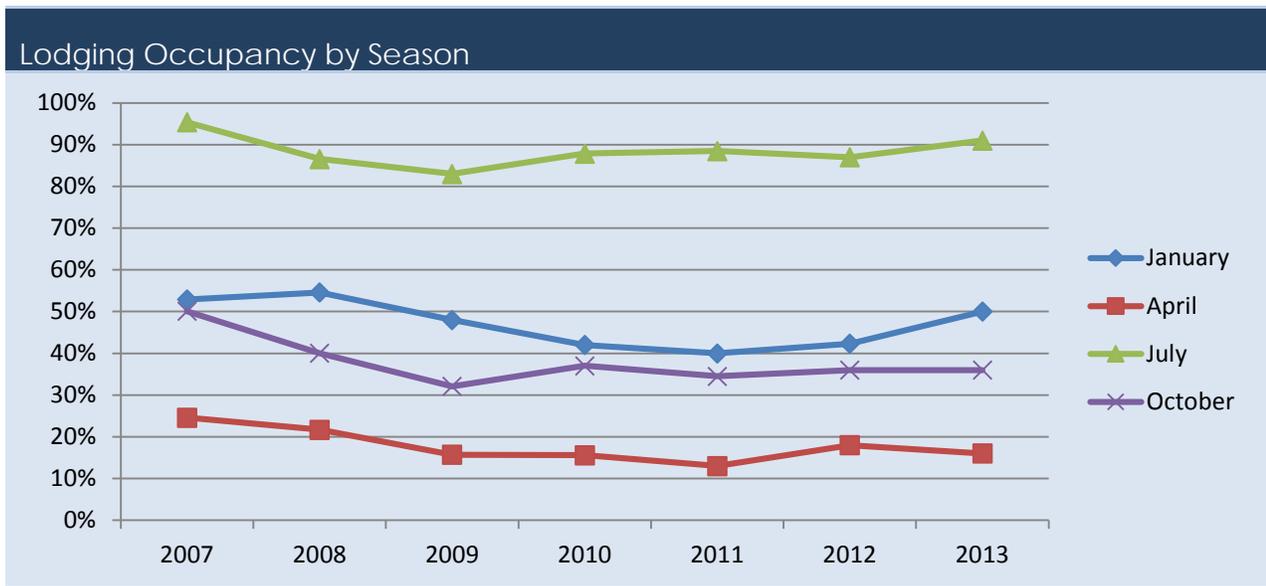
Jobs, Housing Balance Takeaways:

- Staff is still working to establish a methodology for understanding the relationship between growth in jobs, housing, and population.

15. Lodging Occupancy by Season

The economic development goal of the community is to “grow better, not bigger”. One of the key components of that goal is to improve shoulder season occupancy in order to utilize existing lodging capacity to increase economic activity. In 2014 the Jackson Hole Chamber of Commerce changed its reporting on lodging occupancy and reservations. To date staff and the Chamber have not been able to discuss that change and so the data and analysis presented below are the same as presented last year. In future reports staff will update trends to utilize the new methodology.

April and October reservations were up for 2013 from 2012, but actual occupancy was flat or slightly lower. This could indicate success in efforts to promote off-season tourism, tempered by a lack of drop-in visitors that may have more to do with factors such as gas prices and weather that are out of our control.



Source: Rocky Mountain Lodging Report

The Jackson Hole Chamber of Commerce tracked reservations from its lodging members on a monthly basis to project occupancy in various regions of the valley. These numbers do not necessarily represent actual occupancy because they do not account for no-shows or walk-ins. The Rocky Mountain Lodging

Report looks at lodging throughout the region at provides numbers on actual occupancy for the entire County. Reservations seem to be a better predictor of lodging occupancy in the winter and spring when travel is more difficult than the summer and fall when travelers can be more flexible.

2013 Lodging Occupancy				
	January	April	July	October
Reservations (Chamber)				
Downtown	40%	19%	87%	37%
Outlying Jackson	26%	16%	89%	30%
Teton Village	58%	11%	75%	36%
Vacation Rentals	48%	11%	73%	10%
Parks/Moran	closed	closed	90%	46%
All	42%	16%	82%	31%
Occupancy (Rocky Mountain Lodging Report)				
	50%	16%	91%	36%

Source: Jackson Hole Chamber of Commerce

Lodging Occupancy Takeaways:

- The work of the travel and tourism board to increase lodging occupancy in shoulder seasons is one of the most tangible policies that has seen implementation success since adoption of the Comprehensive Plan.

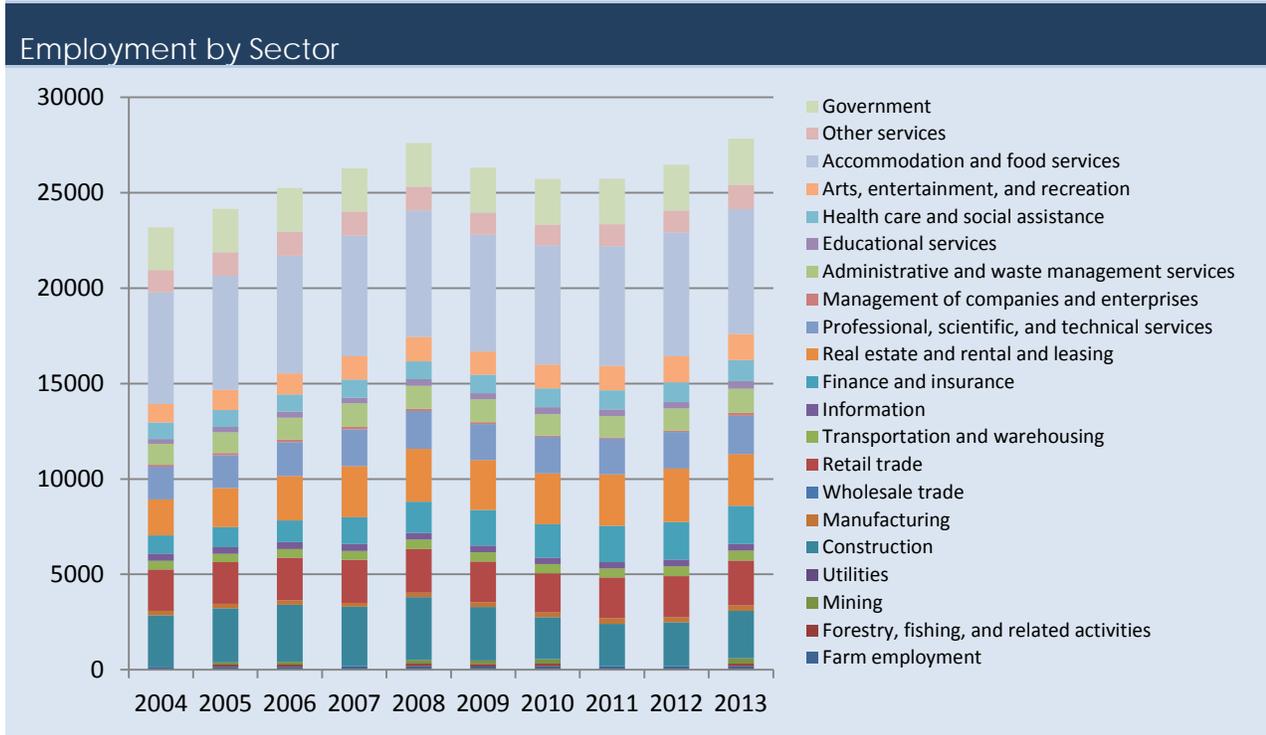
16. Employment by Sector

Jobs by sector indicate the make-up and balance of the employment opportunities in the community. The total number of jobs in the community went down with the recession, but has rebounded to exceed pre-recession levels. What is most informative in looking at the data is a comparison of the growth rate of different sectors to determine which sectors are growing faster than the overall job market.

Construction employment shrunk from a consistent 12% of jobs prior to 2009 to 8% of jobs in 2010 and 2011. 2012 and 2013 would indicate some rebound, however recent increases in construction activity will not be reflected in this data for a few years because of the lag in data available from the US Bureau of Economic Analysis (BEA). Meanwhile, finance and insurance and real estate each grew as a percentage of overall employment prior to 2009, and have maintained their percentage of the overall job market since. Unlike construction these sectors were not any more affected by the recession than the overall job market.

The data reported below is from the US Bureau of Economic Analysis (BEA). The downside to BEA data is the lag in its reporting, meaning that we have only one or two years of data since the adoption of the Comprehensive Plan. The benefit of this data is that it includes all jobs, whereas other reports do not include jobs of sole proprietors and other establishments that are not required to pay unemployment insurance. Using a proxy for the BEA data to get a more recent indicator is problematic because the community has seen a significant increase over the past 10 years in the proportion of jobs

that are not covered by unemployment insurance. In 2003 proprietors employment made up only 24% of total jobs, in 2013 it made up 33%. This growth was steady and a result of a consistent growth in real numbers of proprietor employment, not just a growth in percentage resulting from a decrease in overall employment beginning in 2009. If proprietor employment remains a constant percentage of jobs as it has for the past 3 – 4 years, staff may consider a proxy data source that only includes insured employees.



Source: US Bureau of Economic Analysis

Employment by Sector Takeaways

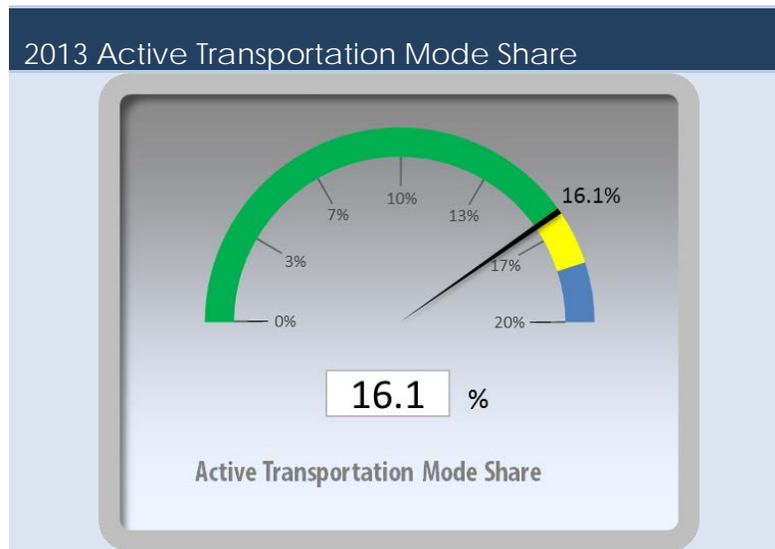
- Data are not yet available to indicate trends since adoption of the Comprehensive Plan, however there are no economic development policies to monitor either.

17. Active Transportation Mode Share and START Annual Ridership (formerly Population Served by START)

The Integrated Transportation Plan proposes monitoring active transportation mode share and START ridership rather than START service area. These indicators, along with the other traffic indicators, will be displayed in the “ITP Dashboard” on www.jacksontetonplan.com. This dashboard display provides any easy visual reference for how the community is doing relative to our 2024 (represented by the yellow) and 2035 (represented by the blue) goals set in the Integrated Transportation Plan.

The intent of the original START service area indicator was to track the community’s access to alternate modes of travel. The ITP proposed measure of mode share more directly addresses the community’s goal of transportation by alternate mode. Population served by START was originally proposed

because it was the best available option to look at transportation mode. However, the downside of service provision indicators is that they can sometimes lead to inefficiencies in service design that provides service to more households but results in transit routing that does not provide the most benefit to the transportation system. The ITP establishes a model for looking at active transportation mode share using travel to work data. Active travel to work data tends to mirror overall active transportation.



Source: ITP Dashboard, American Community Survey

Above is the 2013 ITP Dashboard display for active transportation mode share, which is the baseline that will be used in future years to evaluate implementation of the Integrated Transportation Plan. As discussed in more detail in the ITP, a “no change” scenario based on projection of current trends would result in a continuation of the current active transportation mode share of 16.1%. As depicted above the ITP goals is 18% active transportation mode share in 2024 and 20% in 2035. The community’s trend in meeting these goals will be tracked in future years as the ITP is implemented.

Active Transportation Mode Share Takeaways:

- In order to increase active transportation mode share the ITP must be adopted.
- Future years’ data will indicate if we are successfully meeting the ITP goals

Central to the Integrated Transportation Plan is the goal to double transit ridership in the next 10 years, then double it again by 2035. As a result the ITP establishes transit ridership as an indicator. Below is the 2013 ITP Dashboard display for annual START ridership, which is the baseline that will be used in future years to evaluate implementation of the Integrated Transportation Plan. As discussed in more detail in the ITP, a “no change” scenario based on projection of current trends would result in in 2024 annual START ridership of 1.1 million and 2035 ridership of 1.2 million. As depicted above the ITP goals is 1.8 million riders in 2024 and 3.6 million in 2035. The community’s trend in meeting these goals will be tracked in future years as the ITP is implemented.



Source: ITP Dashboard, START

In addition to total annual START ridership, the ITP Dashboard also includes average monthly summer START ridership per capita to track ridership growth against effective population growth during the community's busiest season. This is a function of ridership for the months of June, July, August, and September and the effective population for those same months. For 2013 we believe the summer average monthly ridership per capita to be 1.0 rides.

START Ridership Takeaways:

- In order to double transit ridership in the next 10 years, then double it again in the following 10 year, the ITP must be adopted.
- Future years' data will indicate if we are successfully meeting the ITP goals

18. Major Capital Project Benchmarks

(formerly Percentage of Transportation Network "Complete Streets")

The community began tracking the percentage of the transportation network that met the Comprehensive Plan goals of providing "complete streets". However, this indicator became a mere track of street projects because, to our credit, each project improved an existing street to a complete street. As a result, staff believes that the Integrated Transportation Plan (ITP) established major capital project benchmarks are a more appropriate measure to report in this space.

The ITP establishes 3 Groups of capital projects to address 3 of the primary transportation corridors in the community: 1) Highway 22, 2) Moose-Wilson Road, 3) North Highway 89. For each group, the ITP establishes thresholds to initiate the projects and then start construction so that the need does not catch the community by surprise. The thresholds are based on average daily summer traffic. Average daily summer traffic accounts for the need to plan for our busiest time without overreacting to the absolute peak. For each group, a permanent traffic counter is used as an indicator station. The ITP contains greater detail on the methodology behind the benchmarks, but this report is an appropriate place to review them each year, especially in the context of the other measures of growth.

ITP Major Capital Project Group Benchmarks			
	Hwy 22	Moose-Wilson	N. Hwy 89
2014	21,379 vpd	14,575 vpd	12,770 vpd
1st Benchmark	Prelim. Eng.	Prelim. Eng.	NEPA/PEL
Criteria	5 yrs. pre-LOS D	5 yrs. pre-LOS D	10 yrs. pre-LOS D
Trigger	18,600 vpd	18,600 vpd	17,200 vpd
2nd Benchmark	Construction	Construction	Construction
Criteria	LOS D	LOS D	LOS D
Trigger	20,000 vpd	20,000 vpd	20,000 vpd

Source: Integrated Transportation Plan

As we monitor traffic at the indicator stations we will be able to see these groups of projects coming. As indicated in the table above the Highway 22 project group is already overdue. If the ITP is adopted it would project that neither the Moose-Wilson nor N. Hwy 89 project groups hit the first benchmark by 2035. Under a “no change” approach to transportation the Moose-Wilson Road first benchmark would be hit by 2035, but the N. Hwy 89 benchmark would still not be reached.

Major Capital Project Takeaways:

- The Moose-Wilson project group can be avoided if the ITP is adopted.
- Future years’ data will indicate how implementation of the ITP is impacting our need for major capital projects

19. Level of Service

While the Town and County continue to transition toward budgeting that is based on maintaining level of service, standard definitions and metrics for each community service have not yet been developed. In the near future, this annual indicator report and the associated implementation work plan may be expanded to be used in allocating a community priorities fund generated by any additional sales tax. For that to work levels of service will have to be defined.