



May 29, 2024

James Corless  
Executive Director  
Sacramento Area Council of Governments

SUBJECT: 2025 Blueprint MTP/SCS – Study of Developing Communities and Potentially Developing Communities

Dear James,

ECOS has conducted an analysis related to housing units in the Developing Communities and Potentially Developing Communities in SACOG's land use scenarios for the 2025 Blueprint (MTP/SCS). We would appreciate your sharing this letter and attachments with your Committees in June.

Our starting material was SACOG's Discussion Scenario Attachments A and E (April 4, 2024), and Option 3/Complete Communities Scenario Attachment A (May 16, 2024). The analysis in Appendix 1 below refers to Option 3/Complete Communities, but our concerns about it are even greater for the Discussion Scenario.

Appendix 2 below includes screenshots of spreadsheets. For your use are our Excel Worksheets, separate Attachments 1, 2, and 3:

- 1 -- Complete Communities Scenario
- 2 -- Discussion Scenario
- 3 -- Side-by-Side comparison of Complete Communities and Discussion Scenario

We focused our analysis on Developing and Potentially Developing Communities (44 in Option 3, 48 in the Discussion Scenario) for which SACOG projected the addition of housing units in 2020-2050, the plan period for the 2025 Blueprint MTP/SCS.

We asked why many of these developments are fully entitled, many for more than a decade, but have not started construction.

We talked with experts who told us about the limit to market demand in the region and about developers' concerns about oversupplying the market and negatively affecting their home sales prices. To limit the risk to investors of front-end backbone infrastructure costing tens of millions of dollars, they said development projects should take just ten to twenty years to fully build out.

We analyzed the time projected for the developments in Option 3 to get from entitlement through construction to receipt of revenue from home sales.

When we calculated the average annual rate of absorption for the 2020-2050 period for each development, we found only a few were projected to achieve the 5 percent average annual rate that is needed to complete buildout in twenty years. Most had rates that were much lower, that is, slower.

Based on the average annual rates, we calculated the total years to Full Buildout. The developments range from 29 years to many hundreds of years, far from the recommended ten to twenty.

When we calculated the actual year of build out for each development, we found that only about ten percent of the developments will achieve Full Buildout by 2050.

Our overarching tentative conclusion is that neither the Complete Communities Scenario nor the Discussion Scenario is feasible to build in the plan period, and therefore they both fail the “Remain Feasible” test set by the Board.

We support the SACOG staff’s criteria-based approach (market, policy, regulatory, must achieve GHG target, must be feasible, optimize for triple bottom line policy goals, and incorporate local feedback) for selecting which Developing Communities in the Complete Communities Scenario to project for additional units by 2050 compared to the Discussion Scenario. It is logical and consistent with the Board’s direction.

However, the total number of units re-located to higher performing Developing Communities was quite modest, approximately 1,200 by 2035 and an additional 8,000 by 2050, a small fraction of the approximately 88,000 new units projected by 2050. And, most importantly, except for Liberty in West Sacramento, Delta Shores in Sacramento City, and the Research & Technology Park in Woodland, none of the Developing Communities that received additional units is close to build-out by 2050.

It is important to provide the Board with fully built out Developing Communities, with a demonstration of the associated possible performance benefits. We recommend that a more robust Option 3 be developed using your criteria, that selects a small number of Developing Communities which received addition units in Option 3 to receive enough new units to be fully built-out by 2050. The Board needs to have this information before selecting a land use alternative for the next plan to adopt in June.

We have one related concern and recommendation. SACOG staff have been clear that none of these scenarios to date actually meets the CARB target. We recommend that the Board understand more fully the details and implications of what needs to happen with the transportation system and all of the programs that go with it (tolling, telework, etc.) before the Board makes a final decision on the land use pattern. We believe that there likely are also politically and technically difficult issues in these other two “buckets” of potential savings. We would prefer that the Board keep an option alive, at least for now, that moves a few more units into Centers and Corridors and Established Communities and subtracts those units from Developing Communities. Until you have certainty that you have a path that meets the target and protect billions of dollars of state transportation funds for the entire region, we recommend keeping options open. We also strongly encourage you to seek federal funding for your excellent Green Means Go program as well as to continue to pursue future state funding.

Thank you for considering what we present in the following pages, and for your efforts to set the region on a sustainable course.

Sincerely,



Susan Herre AIA AICP  
President of the Board of Directors

## APPENDIX 1 – Our Analysis

### Basis for our analysis:

Our analysis of Developing Communities and Potentially Developing Communities used SACOG’s Discussion Scenario Attachments A and E (April 2024) and Option 3/Complete Communities Scenario Attachment A and Staff Report (May 16, 2024 Board packet).

In the April LUNR and Board meetings, SACOG staff said the adopted land use scenario MUST achieve our GHG Target and “Remain Feasible.” At that meeting, the Board asked staff to pursue Option 3, the Complete Communities Scenario for Developing Communities and Potentially Developing Communities, to include in the 2025 Blueprint document fewer but more fully built out greenfield communities. This is based on the notion that VMT per capita at full buildout is less than at earlier phases of development; that concentrating greenfield development in fewer, more fully built out communities, will help the region meet the CARB greenhouse gas emission reduction target, and protect the flow of billions of state transportation dollars into the region.

### Our preliminary inquiry:

We asked why there is a huge oversupply of greenfield projects, many of which are fully entitled and yet have not started construction. SACOG has documented this condition. Over the last few months, we asked professionals with extensive experience with large, master-planned, greenfield communities to explain the conditions that make it attractive for investors to commit the substantial funds necessary to start construction on these large projects. Their answers had to do with the market demand for housing units in specific locations, and investors’ assessments of how that market demand affects the time duration from entitlements through construction to revenue from home sales. This time duration is critical to investors as shown by these responses:

A: Backbone infrastructure (underground utilities and streets) is built first -- often the infrastructure for the entire development, even though the housing buildout may be phased. This takes significant funding from early investors, at least tens and sometimes hundreds of millions of dollars committed upfront. Payback begins when housing units sell, so the speed at which housing units are sold in the early years is a very important consideration for early investors.

B: Often different funders invest in a project over the course of its build-out. The first investor takes the highest risk and wants to earn a high profit margin and quick payback. First investors often expect to get their money back within two to three years, so the annual average rate of housing unit construction (absorption rate) in the early years is especially important.

C: While the economics of every greenfield are unique, in general, investors are looking for a realistic build-out of the entire greenfield within a 10- to 15-year period. This can sometimes stretch to 20 years when some form of public financing is involved.

Also, we were told by professionals in the field and people associated with specific approved and unbuilt greenfield developments in the SACOG region, that the existing oversupply of entitled greenfield projects has a strong dampening effect on the willingness of early investors.

There is a limit to the regional and sub-regional market demand, represented by the fairly constant average number of homes purchased within a given time period (even considering in-migration). This topic is often not considered during the entitlement process. With so many development opportunities to choose from, a prospective investor is understandably concerned that approved nearby developments may flood the market if their housing units are offered at the same time as his or her own, and negatively impacting sale prices and returns on investment.

**Analysis of the SACOG projections in the Complete Communities scenario (May 2024):**

We analyzed the 44 developments in the Complete Communities Scenario for Developing Communities and Potentially Developing Communities for which SACOG indicated housing units would be added during the 2020-2050 period. Refer to Attachment 2 for our spreadsheet. These developments are projected to add 88,755 housing units before 2050. If we add the existing units in 2020 and the projected additional units by 2050, the sum is only 48 percent of the full buildout for these developments. If the goal is to have fewer developments at full buildout, a lot more consolidation work can be done.

44 Developments with HU added during 2020-2050			
HU at Full Buildout	Existing HU in 2020	Additional HU 2020-2050	Existing HU in 2020 + Additional HU 2020-2050 as % of HU at Full Buildout
<b>236,242</b>	<b>23,720</b>	<b>88,755</b>	<b>48%</b>

*Table 1: Complete Communities - existing and additional HU as % of their full build out*

Developing Communities and Potentially Developing Communities also includes approximately 27 other projects that are either already entitled or going through the entitlement process. When you add their housing units to the 44 developments above, the grand total is 425,614 housing units at Full Buildout. This is the huge oversupply of greenfield projects mentioned above.

**Time duration and rate of absorption:**

For the 44 developments, we looked at the time duration from entitlement through construction to receipt of revenue from home sales (to have them absorbed by market demand). We calculated the average annual rate for new housing units during the three time periods used in the SACOG Complete Communities Scenario - 2020-2035, 2036-2050, 2020-2050. Our experts said investors look for the buildout of a greenfield project in ten to fifteen years, maybe twenty years if public financing is involved. This requires an average absorption rate of between 5% and 10% per year.

Of the 44 developments that are projected to add housing units between 2020 and 2050, only five add units at a 5 percent rate during 2020-2035, and only four add housing units at a 5 percent rate during 2036-2050. For many of these developments, the 5 percent rate is much faster than in previous periods. SACOG staff has pointed this out but has not explained how the faster rate in the future is feasible.

As shown in Table 2 below, these developments have a fairly high percentage of buildout in 2050 (mostly 90-100%), although even at the 5 percent rate, they take 30 or more years to achieve full buildout -- well beyond the ten- to twenty-year buildout period our experts said was optimal.

Yet, even if the developments do build out at the projected rate, the total number of housing units built between 2020 and 2050 from these developments will be only 22,260, or 25% of the total projected 88,755 housing units projected to be added in Complete Communities for Developing and Potentially Developing Communities.

	Att A Complete Com Scenario May2024					
	HU at BO	Annual ave HU 2020-2035 as % of BO	Annual ave HU 2036-2050 as % of BO	Annual ave HU 2020-2050 as % of BO	HU built by 2050 as % of Total BO	Total Years to BO based on Annual ave HU 2020-2050
<b>PLACER COUNTY</b>						
<b>Lincoln</b>						
<i>SUD B Northeast Quadrant</i>	430	0%	5%	2%	70%	43
<b>Roseville</b>						
<i>Creekview</i>	2,011	5%	2%	3%	98%	31
<i>Sierra Vista</i>	8,772	5%	1%	3%	95%	32
<b>Placer County Unincorporated</b>						
<i>Riolo Vineyards Specific Plan</i>	930	5%	1%	3%	101%	30
<b>SACRAMENTO COUNTY</b>						
<b>Elk Grove</b>						
<i>Livable Employment Area</i>	3,513	1%	5%	3%	85%	35
<i>Southeast Planning Area</i>	4,090	6%	1%	3%	98%	31
<b>Rancho Cordova</b>						
<i>The Ranch</i>	1,554	5%	1%	3%	97%	31
<b>YOLO COUNTY</b>						
<b>West Sacramento</b>						
<i>Liberty (East View)</i>	1,500	0%	7%	3%	100%	30
<b>Woodland</b>						
<i>Research &amp; Technology Park</i>	1,600	1%	6%	3%	100%	30

Table 2: Developments with average annual rate of absorption of 5% or more between 2020 and 2050

**Percentage of Full Buildout in 2050:**

This table shows that even with existing housing units and those added in 2020-2050, about half of all the capacity in the 44 developments will be built out at 49 percent or less. Compare C4 and C5.

	A	B	C	D	E	F
	Percentage of Full Buildout in 2050	Number of developments	HU at Full Buildout	Existing HU in 2020	HU Built 2020-2050	HU Built 2020-2050 as % of Total HU built 2020-2050 = E/C5
<b>1</b>	90-100%	12	34,574	4,270	29,497	33.2%
<b>2</b>	70-89%	11	55,100	9,870	33,965	38%
<b>3</b>	50-69%	5	17,275	4,770	6,220	7%
<b>4</b>	49% and below	16	129,293	4,810	19,070	21%
<b>5</b>	<b>Total</b>	<b>44</b>	<b>236,242</b>	<b>23,720</b>	<b>88,752</b>	

Table 3: Developments by percentage of Full Buildout in 2050

In the table below, the developments projected to achieve 90% or more buildout by 2050 leave remaining capacity of 817 housing units. Could the 2025 Blueprint provide for their completion?

	Att A Complete Com Scenario May2024	Att A Complete Com Scenario May2024	Att A Complete Com Scenario May2024				
	HU at BO	Existing HU in 2020	Additional HU 2020-2050	HU built by 2050 as % of Total BO	Total Years to BO based on Annual ave HU 2020-2050	Total HU remaining to be built after 2050	Projected Final Buildout Year
<b>EI DORADO COUNTY</b>							
<i>Bass Lake Hills</i>	1400	180	1,200	99%	31	20	2051
<i>Carson Creek</i>	1925	1050	880	100%	30	-5	2050
<i>Valley View</i>	2840	2130	725	101%	29	-15	2049
<b>PLACER COUNTY</b>							
<b>Roseville</b>							
<i>Creekview</i>	2,011	0	1,970	98%	31	41	2051
<i>Sierra Vista</i>	8,772	850	7,500	95%	32	422	2052
<b>Placer County Unincorporated</b>							
<i>Riolo Vineyards Specific Plan</i>	930	30	910	101%	30	0	2050
<b>SACRAMENTO COUNTY</b>							
<b>Elk Grove</b>							
<i>Southeast Planning Area</i>	4,090	10	4,000	98%	31	80	2051
<b>Rancho Cordova</b>							
<i>The Ranch</i>	1,554	0	1,500	97%	31	54	2051
<b>Sacramento</b>							
<i>Delta Shores</i>	5,220	0	5,000	96%	31	220	2051
<i>NorthLake</i>	2,732	0	2,732	100%	30	0	2050
<b>YOLO COUNTY</b>							
<b>West Sacramento</b>							
<i>Liberty (East View)</i>	1,500	20	1,480	100%	30	0	2050
<b>Woodland</b>							
<i>Research &amp; Technology Park</i>	1,600	0	1,600	100%	30	0	2050
	<b>34,574</b>	<b>4,270</b>	<b>29,497</b>			<b>817</b>	

Table 4: Developments projected to build out by 2050 at 90-100% of capacity

In this table, the developments projected to achieve 70-89% buildout by 2050 leave remaining capacity of 11,265 housing units. Could the 2025 Blueprint provide for their completion?

	Att A Complete Com Scenario May2024	Att A Complete Com Scenario May2024	Att A Complete Com Scenario May2024				
	HU at BO	Existing HU in 2020	Additional HU 2020-2050	HU built by 2050 as % of Total BO	Total Years to BO based on Annual ave HU 2020-2050	Total HU remaining to be built after 2050	Projected Final Buildout Year
<b>PLACER COUNTY</b>							
<b>Lincoln</b>							
<i>SUD B Northeast Quadrant</i>	430	0	300	70%	43	130	2063
<b>Roseville</b>							
<i>Amoruso Ranch</i>	2,827	0	2,300	81%	37	527	2057
<b>Placer County Unincorporated</b>							
<i>Placer Ranch</i>	5,640	0	4,000	71%	42	1,640	2062
<b>SACRAMENTO COUNTY</b>							
<b>Elk Grove</b>							
<i>Livable Employment Area</i>	3,513	0	3,000	85%	35	513	2055
<i>Sterling Meadows</i>	1,415	330	790	79%	41	295	2061
<b>Folsom</b>							
<i>Folsom South Area</i>	11,340	220	8,500	77%	39	2,620	2059
<b>Rancho Cordova</b>							
<i>Sunridge</i>	9,886	4,470	4,200	88%	39	1,216	2059
<b>Sacramento</b>							
<i>Panhandle</i>	1,620	0	1,295	80%	38	325	2058
<b>Sacramento County Unincorporated</b>							
<i>Florin Vineyard</i>	9,919	690	6,485	72%	43	2,744	2063
<b>YUBA COUNTY</b>							
<b>Yuba County Unincorporated</b>							
<i>East Linda</i>	6,010	2,910	2,200	85%	42	900	2062
<i>North Arboga Study Area</i>	2,500	1,250	895	86%	42	355	2062
	<b>55,100</b>	<b>9,870</b>	<b>33,965</b>			<b>11,265</b>	

Table 5: Developments projected to build out by 2050 between 70-89% of capacity

If all of projected housing units in the Green (90+%) and Yellow (70-89%) levels were to fully build out by 2050, their total of 63,462 would be nearly 72 percent of the total projected of 88,755 housing units in the Complete Communities Scenario for the Developing and Potentially Developing Communities.

	Att A Complete Com Scenario May2024	Att A Complete Com Scenario May2024	Att A Complete Com Scenario May2024				
	HU at BO	Existing HU in 2020	Additional HU 2020-2050	HU built by 2050 as % of Total BO	Total Years to BO based on Annual ave HU 2020-2050	Total HU remaining to be built after 2050	Projected Final Buildout Year
<b>PLACER COUNTY</b>							
<b>Rocklin</b>							
Highway 65 Corridor	1,650	540	480	62%	69	630	2089
<b>Placer County Unincorporated</b>							
Bickford Ranch Specific Plan	1,890	0	1,200	63%	47	690	2067
<b>SACRAMENTO COUNTY</b>							
<b>Galt</b>							
Eastview	1,730	10	1,090	64%	47	630	2067
<b>Sacramento County Unincorporated</b>							
North Vineyard Station	6,063	1,620	2,150	62%	62	2,293	2082
Vineyard Springs	5,942	2,600	1,300	66%	77	2,042	2097
	<b>17,275</b>	<b>4,770</b>	<b>6,220</b>			<b>6,285</b>	

Table 6: Developments projected to build out by 2050 between 50-69% of capacity

	Att A Complete Com Scenario May2024	Att A Complete Com Scenario May2024	Att A Complete Com Scenario May2024				
	HU at BO	Existing HU in 2020	Additional HU 2020-2050	HU built by 2050 as % of Total BO	Total Years to BO based on Annual ave HU 2020-2050	Total HU remaining to be built after 2050	Projected Final Buildout Year
<b>PLACER COUNTY</b>							
<b>Lincoln</b>							
Village 1	5,920	40	2,300	40%	77	3,580	2097
Village 7	3,790	10	1,200	32%	95	2,580	2115
Village 2	2,210	40	210	11%	310	1,960	2330
<b>Placer County Unincorporated</b>							
Placer Vineyards Specific Plan	14,130	160	3,200	24%	131	10,770	2151
<b>SACRAMENTO COUNTY</b>							
<b>Galt</b>							
Remaining SOI	4,710	460	80	11%	1594	4,170	3614
<b>Rancho Cordova</b>							
Rio Del Oro	14,515	20	2,485	17%	175	12,010	2195
Suncreek	5,015	0	1,200	24%	125	3,815	2145
<b>Sacramento County Unincorporated</b>							
Glenborough at Easton	3,239	0	300	9%	324	2,939	2344
Jackson West	16,484	110	2,000	13%	246	14,374	2266
<b>SUTTER COUNTY</b>							
<b>Yuba City</b>							
Bogue Stewart	4,920	80	500	12%	290	4,340	2310
South SOI/Hwy 99 Corridor	1,500	40	75	8%	584	1,385	2604
Lincoln East	10,250	210	200	4%	1506	9,840	3526
<b>Sutter County Unincorporated</b>							
Sutter Pointe	19,960	20	1,500	8%	399	18,440	2419
<b>YOLO COUNTY</b>							
<b>West Sacramento</b>							
Yarborough	3,000	20	120	5%	745	2,860	2765
<b>YUBA COUNTY</b>							
<b>Wheatland</b>							
Jones Ranch and Heritage Oaks	1,520	10	600	40%	76	910	2096
<b>Yuba County Unincorporated</b>							
Plumas Lake	18,130	3,590	3,100	37%	141	11,440	2161
	<b>129,293</b>	<b>4,810</b>	<b>19,070</b>			<b>105,413</b>	

Table 7: Developments projected to build out by 2050 between 0-49% of capacity



**Projected Final Buildout Date for the developments:**

We estimated the projected year of Full Buildout:  $(Total\ HU\ (Full\ Buildout) - Existing\ HU\ in\ 2020) / annual\ average\ rate\ for\ 2020-2050\ period = Total\ Years\ to\ BO$ . To get the Year at Full Buildout:  $2050 + (Total\ HU\ remaining\ to\ be\ built\ after\ 2050 / annual\ average\ rate\ for\ 2020-2050\ period)$

The table below shows that only nine percent of the 88,752 housing units will be built by 2050. Fifty-three percent will be built by 2060. Of the 44 developments in Complete Communities, 28 developments are not projected to achieve full buildout until after 2060, and 15 of those are not projected to be built out until well past 2100.

Projected to achieve Full Buildout	Number of developments	HU Built 2020-2050	% HU added during 2020-2050
By 2050	6	8,327	9%
By 2060	10	39,170	44%
After 2060	28	41,255	46%
<b>Total</b>	<b>44</b>	<b>88,755</b>	

Table 8: Developments and housing units by year of final buildout

**Conclusions:**

Given the analysis above, our overarching tentative conclusion is that many of the projected housing units in the Complete Communities (and Draft Scenario) will not be built for many years, if ever, and therefore they should not be included in the 2025 Blueprint, because of the “Remain Feasible” mandate.

Our analysis and overarching tentative conclusion may not apply to specific developments. We recognize it is possible that for some developments, early investment in infrastructure (utilities and streets) may not be needed.

We support the consolidation concept of Complete Communities and recommend it be applied even more heavily to greenfield projects to help solve the time duration issue and achieve more complete communities. Having fewer yet more built out new growth areas will help to shorten the time from entitlement to home sales, because the risk to investors will be less, because fewer developments will be competing for new home sales. Since the Complete Communities concept prioritizes consolidated developments that are adjacent to existing developed areas and are more VMT-efficient, it helps to make the best of a greenfield situation and improves the possibility of meeting meet CARB’s emission reduction target.

We recommend deleting projections for greenfield housing units that are infeasible to accomplish within the plan period and shifting housing units from infeasible greenfield developments to infill areas while seeking federal funding for Green Means Go to facilitate that infill development.

APPENDIX 2 – Screenshots of Excel spreadsheets

Analysis of Housing Units in Developing and Potentially Developing Communities - Complete Communities Scenario, May 2024											
	Att A Complete Com Scenario May2024	Att A Complete Com Scenario May2024			Att A Complete Com Scenario May2024						
	HU at BO	Existing HU in 2020	Annual ave HU 2020-2035 as % of BO	Annual ave HU 2036-2050 as % of BO	Additional HU 2020-2050	Annual ave HU 2020-2050	Annual ave HU 2020-2050 as % of BO	HU built by 2050 as % of Total BO	Total Years to BO based on Annual ave HU 2020-2050	Total HU remaining to be built after 2050	Projected Final Buildout Year
<b>EI DORADO COUNTY</b>											
<i>Bass Lake Hills</i>	1400	180	2%	4%	1,200	40	3%	99%	31	20	2051
<i>Carson Creek</i>	1925	1050	3%	0%	880	29	2%	100%	30	-5	2050
<i>Valley View</i>	2840	2130	0%	2%	725	24	1%	101%	29	-15	2049
<b>PLACER COUNTY</b>											
<b>Lincoln</b>											
<i>SUD B Northeast Quadrant</i>	430	0	0%	5%	300	10	2%	70%	43	130	2063
<i>Village 1</i>	5,920	40	2%	1%	2,300	77	1%	40%	77	3,580	2097
<i>Village 7</i>	3,790	10	0%	2%	1,200	40	1%	32%	95	2,580	2115
<i>Village 2</i>	2,210	40	1%	0%	210	7	0%	11%	310	1,960	2330
<b>Rocklin</b>											
<i>Highway 65 Corridor</i>	1,650	540	2%	0%	480	16	1%	62%	69	630	2089
<b>Roseville</b>											
<i>Creekview</i>	2,011	0	5%	2%	1,970	66	3%	98%	31	41	2051
<i>Sierra Vista</i>	8,772	850	5%	1%	7,500	250	3%	95%	32	422	2052
<i>Amoruso Ranch</i>	2,827	0	1%	4%	2,300	77	3%	81%	37	527	2057
<b>Placer County Unincorporated</b>											
<i>Placer Vineyards Specific Plan</i>	14,130	160	1%	1%	3,200	107	1%	24%	131	10,770	2151
<i>Riolo Vineyards Specific Plan</i>	930	30	5%	1%	910	30	3%	101%	30	0	2050
<i>Bickford Ranch Specific Plan</i>	1,890	0	2%	2%	1,200	40	2%	63%	47	690	2067
<i>Placer Ranch</i>	5,640	0	1%	4%	4,000	133	2%	71%	42	1,640	2062
<b>SACRAMENTO COUNTY</b>											
<b>Elk Grove</b>											
<i>Livable Employment Area</i>	3,513	0	1%	5%	3,000	100	3%	85%	35	513	2055
<i>Southeast Planning Area</i>	4,090	10	6%	1%	4,000	133	3%	98%	31	80	2051
<i>Sterling Meadows</i>	1,415	330	2%	1%	790	26	2%	79%	41	295	2061
<b>Folsom</b>											
<i>Folsom South Area</i>	11,340	220	3%	2%	8,500	283	2%	77%	39	2,620	2059
<b>Galt</b>											
<i>Eastview</i>	1,730	10	2%	2%	1,090	36	2%	64%	47	630	2067
<i>Remaining SOI</i>	4,710	460	0%	0%	80	3	0%	11%	1594	4,170	3614
<b>Rancho Cordova</b>											
<i>Sunridge</i>	9,886	4,470	3%	0%	4,200	140	1%	88%	39	1,216	2059
<i>Rio Del Oro</i>	14,515	20	1%	1%	2,485	83	1%	17%	175	12,010	2195
<i>Suncreek</i>	5,015	0	1%	1%	1,200	40	1%	24%	125	3,815	2145
<i>The Ranch</i>	1,554	0	5%	1%	1,500	50	3%	97%	31	54	2051
<b>Sacramento</b>											
<i>Delta Shores</i>	5,220	0	2%	4%	5,000	167	3%	96%	31	220	2051
<i>NorthLake</i>	2,732	0	4%	2%	2,732	91	3%	100%	30	0	2050
<i>Panhandle</i>	1,620	0	2%	3%	1,295	43	3%	80%	38	325	2058
<b>Sacramento County Unincorporated</b>											
<i>Florin Vineyard</i>	9,919	690	1%	3%	6,485	216	2%	72%	43	2,744	2063
<i>North Vineyard Station</i>	6,063	1,620	1%	1%	2,150	72	1%	62%	62	2,293	2082
<i>Vineyard Springs</i>	5,942	2,600	1%	1%	1,300	43	1%	66%	77	2,042	2097
<i>Glenborough at Easton</i>	3,239	0	0%	1%	300	10	0%	9%	324	2,939	2344
<i>Jackson West</i>	16,484	110	0%	1%	2,000	67	0%	13%	246	14,374	2266
<b>SUTTER COUNTY</b>											
<b>Yuba City</b>											
<i>Bogue Stewart</i>	4,920	80	0%	0%	500	17	0%	12%	290	4,340	2310
<i>South SOI/Hwy 99 Corridor</i>	1,500	40	0%	0%	75	3	0%	8%	584	1,385	2604
<i>Lincoln East</i>	10,250	210	0%	0%	200	7	0%	4%	1506	9,840	3526
<b>Sutter County Unincorporated</b>											
<i>Sutter Pointe</i>	19,960	20	0%	0%	1,500	50	0%	8%	399	18,440	2419
<b>YOLO COUNTY</b>											
<b>West Sacramento</b>											
<i>Liberty (East View)</i>	1,500	20	0%	7%	1,480	49	3%	100%	30	0	2050
<b>Woodland</b>											
<i>Research &amp; Technology Park</i>	1,600	0	1%	6%	1,600	53	3%	100%	30	0	2050

**Analysis of Housing Units in Developing and Potential Developing Communities - Discussion Scenario, April 2024**

	Att A DiscussScenar April2024	Att A DiscussScenar April2024			Att A DiscussScenar April2024						
	HU at BO	Existing HU in 2020	Annual ave HU 2020-2035 as % of BO	Annual ave HU 2036-2050 as % of BO	Additional HU 2020-2050	Annual ave HU 2020-2050	Annual ave HU 2020-2050 as % of BO	HU built by 2050 as % of Total BO	Total Years to BO based on Annual ave HU 2020-2050	Total HU remaining to be built after 2050	Projected Final Buildout Year
<b>EI DORADO COUNTY</b>											
Dev Com (already under construction)											
Bass Lake Hills	1400	180	2%	4%	1,200	40	3%	99%	31	20	2,051
Carson Creek	1925	1050	3%	0%	880	29	2%	100%	30	-5	2,050
Valley View	2840	2130	0%	2%	725	24	1%	101%	29	-15	2,049
<b>PLACER COUNTY</b>											
<b>Lincoln</b>											
Dev Com (already under construction)											
SUD B Northeast Quadrant	430	0	0%	5%	300	10	2%	70%	43	130	2,063
Village 1	5,920	40	2%	1%	2,300	77	1%	40%	77	3,580	2,097
Village 5	8,490	90	0%	0%	500	17	0%	7%	504	7,900	2,524
Village 7	3,790	10	0%	2%	1,200	40	1%	32%	95	2,580	2,115
Village 2	2,210	40	1%	0%	210	7	0%	11%	310	1,960	2,330
<b>Rocklin</b>											
Dev Com (already under construction)											
Highway 65 Corridor	1,650	540	2%	0%	480	16	1%	62%	69	630	2,089
<b>Roseville</b>											
Dev Com (already under construction)											
Creekview	2,011	0	5%	2%	1,970	66	3%	98%	31	41	2,051
Sierra Vista	8,772	850	5%	1%	7,500	250	3%	95%	32	422	2,052
Potential Dev Com (not yet under const)											
Amaruso Ranch	2,827	0	1%	4%	2,300	77	3%	81%	37	527	2,057
<b>Placer County Unincorporated</b>											
Dev Com (already under construction)											
Placer Vineyards Specific Plan	14,130	160	1%	1%	4,100	137	1%	30%	102	9,870	2,122
Riolo Vineyards Specific Plan	930	30	5%	1%	910	30	3%	101%	30	-10	2,050
Potential Dev Com (not yet under const)											
Bickford Ranch Specific Plan	1,890	0	2%	3%	1,600	53	3%	85%	35	290	2,055
Placer Ranch	5,640	0	1%	1%	2,000	67	1%	35%	85	3,640	2,105
Sunset Area (excluding Placer Ranch)	2,500	0	0%	1%	200	7	0%	8%	375	2,300	2,395
<b>SACRAMENTO COUNTY</b>											
<b>Elk Grove</b>											
Dev Com (already under construction)											
Livable Employment Area	3,513	0	1%	5%	3,000	100	3%	85%	35	513	2,055
Southeast Planning Area	4,090	10	6%	1%	4,000	133	3%	98%	31	80	2,051
Sterling Meadows	1,415	330	2%	1%	790	26	2%	79%	41	295	2,061
<b>Folsom</b>											
Dev Com (already under construction)											
Folsom South Area	11,340	220	3%	2%	8,500	283	2%	77%	39	2,620	2,059
<b>Galt</b>											
Potential Dev Com (not yet under const)											
Eastview	1,730	10	2%	2%	1,090	36	2%	64%	47	630	2,067
Remaining SOI	4,710	460	0%	0%	80	3	0%	11%	1594	4,170	3,614
<b>Rancho Cordova</b>											
Dev Com (already under construction)											
Sunridge	9,886	4,470	3%	0%	4,200	140	1%	88%	39	1,216	2,059
Rio Del Oro	14,515	20	1%	1%	3,000	100	1%	21%	145	11,495	2,165
Potential Dev Com (not yet under const)											
Suncreek	5,015	0	1%	1%	2,000	67	1%	40%	75	3,015	2,095
The Ranch	1,554	0	5%	1%	1,500	50	3%	97%	31	54	2,051
<b>Sacramento</b>											
Dev Com (already under construction)											
Delta Shores	5,220	0	1%	5%	4,560	152	3%	87%	34	660	2,054
NorthLake	2,732	0	4%	2%	2,735	91	3%	100%	30	-3	2,050
Potential Dev Com (not yet under const)											
Panhandle	1,620	0	2%	3%	1,295	43	3%	80%	38	325	2,058
<b>Sacramento County Unincorporated</b>											
Dev Com (already under construction)											
Florin Vineyard	9,919	690	1%	1%	3,400	113	1%	41%	81	5,829	2,101
North Vineyard Station	6,063	1,620	1%	2%	2,895	97	2%	74%	46	1,548	2,066
Vineyard Springs	5,942	2,600	1%	1%	1,700	57	1%	72%	59	1,642	2,079
Potential Dev Com (not yet under const)											
Cordova Hills	8,000	0	0%	1%	1,500	50	1%	19%	160	6,500	2,180
Glenborough at Easton	3,239	0	0%	1%	300	10	0%	9%	324	2,939	2,344
South Mather	3,522	0	1%	3%	1,805	60	2%	51%	59	1,717	2,079
<b>SUTTER COUNTY</b>											
<b>Yuba City</b>											
Potential Dev Com (not yet under const)											
Bogue Stewart	4,920	80	0%	0%	500	17	0%	12%	290	4,340	2,310
South SOI/Hwy 99 Corridor	1,500	40	0%	0%	75	3	0%	8%	584	1,385	2,604
Lincoln East	10,250	210	0%	0%	200	7	0%	4%	1506	9,840	3,526
<b>Sutter County Unincorporated</b>											
Potential Dev Com (not yet under const)											
Sutter Pointe	19,960	20	0%	0%	1,500	50	0%	8%	399	18,440	2,419
<b>YOLO COUNTY</b>											
<b>West Sacramento</b>											
Potential Dev Com (not yet under const)											
Liberty (East View)	1,500	20	0%	4%	1,000	33	2%	68%	44	480	2,064
River Park	2,790	40	0%	1%	500	17	1%	19%	165	2,250	2,185
Yarborough	3,000	20	0%	2%	700	23	1%	24%	128	2,280	2,148
<b>Woodland</b>											
Potential Dev Com (not yet under const)											
Research & Technology Park	1,600	0	1%	3%	1,000	33	2%	63%	48	600	2,068
<b>YUBA COUNTY</b>											
<b>Wheatland</b>											
Potential Dev Com (not yet under const)											
Jones Ranch and Heritage Oaks	1,520	10	1%	2%	600	20	1%	40%	76	910	2,096
<b>Yuba County Unincorporated</b>											
Dev Com (already under construction)											
East Linda	6,010	2,910	1%	1%	2,200	73	1%	85%	42	900	2,062
North Arboga Study Area	2,500	1,250	1%	1%	895	30	1%	86%	42	355	2,062
Plumas Lake	18,130	3,590	1%	0%	3,100	103	1%	37%	141	11,440	2,161
<b>Total</b>	<b>245,060</b>				<b>88,995</b>					<b>132,325</b>	

**Attachment A - 2025 Blueprint (MTP/SCS)**

Jurisdiction/Community Type	Baseyear and Buildout (same in both April and May 2024 scenarios)		Discussion Scenario, April 2024		Complete Communities Scenario, May 2024	
	Existing Conditions (2020)	Potential Buildout	2020 - 2035	2020 - 2050	2020 - 2035	2020 - 2050
	Housing Units	Housing Units	Housing Units	Housing Units	Housing Units	Housing Units
<b>Eldorado County Unincorporated</b>						
Developing Communities (already under						
<i>Bass Lake Hills</i>	180	1,400	410	1,200	410	1,200
<i>Carson Creek</i>	1,050	1,925	880	880	880	880
<i>Valley View</i>	2,130	2,840	0	725	0	725
<b>EL DORADO COUNTY TOTAL</b>						
<b>Lincoln</b>						
Potential Developing Communities (not yet						
<i>SUD-B Northeast Quadrant</i>	0	430	0	300	0	300
<i>Village 1</i>	40	5,920	1535	2300	1,535	2,300
<i>Village 5</i>	90	8,490	0	500	0	0
<i>Village 7</i>	10	3,790	165	1200	165	1,200
<i>Village 2</i>	40	2,210	210	210	210	210
<b>Rocklin</b>						
Developing Communities (already under						
<i>Hwy 65 Corridor</i>	540	1,650	480	480	480	480
<b>Roseville</b>						
Developing Communities (already under						
<i>Creekview</i>	0	2,011	1,500	1,970	1,500	1,970
<i>Sierra Vista</i>	850	8,772	6,265	7,500	6,265	7,500
Potential Developing Communities (not yet						
<i>Amaruso Ranch</i>	0	2,827	495	2,300	495	2,300
<b>Placer County Unincorporated</b>						
Developing Communities (already under						
<i>Placer Vineyards</i>	160	14,130	1,900	4,100	1,900	3,200
<i>Riolo Vineyards</i>	30	930	740	910	740	910
Potential Developing Communities (not yet						
<i>Bickford Ranch</i>	0	1,890	635	1,600	635	1,200
<i>Placer Ranch</i>	0	5,640	745	2,000	745	4,000
<i>Sunset Area (excluding Placer Ranch)</i>	0	2,500	0	200	0	0
<b>PLACER COUNTY TOTAL</b>						
<b>Elk Grove</b>						
Developing Communities (already under						
<i>Southeast Planning Area</i>	10	4,090	3,400	4,000	3,400	4,000
<i>Sterling Meadows</i>	330	1,415	485	790	485	790
<i>Livable Employment Area</i>	0	3,513	500	3,000	500	3,000
<b>Folsom</b>						
Developing Communities (already under						
<i>Folsom South Area</i>	220	11,340	5,700	8,500	5,700	8,500
<b>Galt</b>						
Potential Developing Communities (not yet						
<i>Eastview</i>	10	1,730	500	1,090	500	1,090
<i>Remaining SOI</i>	460	4,710	80	80	80	80
<b>Rancho Cordova</b>						
Developing Communities (already under						
<i>Sunridge</i>	4,470	9,886	4,050	4,200	4,050	4,200
<i>Rio Del Oro</i>	20	14,515	1300	3,000	1,100	2,485
Potential Developing Communities (not yet						
<i>Suncreek</i>	0	5,015	1000	2000	700	1,200
<i>The Ranch</i>	0	1,554	1270	1500	1,270	1,500
<b>Sacramento City</b>						
Developing Communities (already under						
<i>Delta Shores</i>	0	5,220	850	4,560	1,550	5,000
<i>Northlake</i>	0	2,732	1,785	2,735	1,785	2,735
Potential Developing Communities (not yet						
<i>Panhandle</i>	0	1,620	595	1,295	595	1,295
<b>Sacramento County Unincorporated</b>						
Developing Communities (already under						
<i>Florin Vineyard</i>	690	9,919	1,305	3,400	1,855	6,485
<i>North Vineyard Station</i>	1,620	6,063	1,165	2,895	1,165	2,150
<i>Vineyard Springs</i>	2,600	5,942	710	1,700	710	1,300
Potential Developing Communities (not yet						
<i>Cordova Hills</i>	0	8,000	350	1,500	0	0
<i>Glenborough at Easton</i>	0	3,239	0	300	0	300
<i>South Mather</i>	0	3,522	400	1,805	0	0
<i>Jackson West</i>	110	16,484	0	0	0	2,000
<b>SACRAMENTO COUNTY TOTAL</b>						
<b>Yuba City</b>						
Potential Developing Communities (not yet						
<i>Bogue Stewart</i>	80	4,920	200	500	200	500
<i>South SOI/99 Corridor</i>	40	1,500	0	75	0	75
<i>Lincoln East</i>	210	10,250	100	200	100	200
<b>Sutter County Unincorporated</b>						
Potential Developing Communities (not yet						
<i>Sutter Pointe</i>	20	19,960	500	1,500	500	1,500
<b>SUTTER COUNTY TOTAL</b>						
<b>West Sacramento</b>						
Potential Developing Communities (not yet						
<i>Liberty</i>	20	1,500	0	1,000	0	1,480
<i>River Park</i>	40	2,790	0	500	0	0
<i>Yarborough</i>	20	3,000	0	700	0	120
<b>Woodland</b>						
Potential Developing Communities (not yet						
<i>Research and Tech Park</i>	0	1,600	200	1,000	200	1,600
<b>YOLO COUNTY TOTAL</b>						
<b>Wheatland</b>						
Potential Developing Communities (not yet						
<i>Jones Ranch/Heritage Oaks</i>	10	1,520	200	600	200	600
<b>Yuba County Unincorporated</b>						
Developing Communities (already under						
<i>East Linda</i>	2,910	6,010	1,150	2,200	1,150	2,200
<i>North Arboga Study Area</i>	1,250	2,500	530	895	530	895
<i>Plumas Lakes</i>	3,590	18,130	2,350	3,100	2,350	3,100
<b>YUBA COUNTY TOTAL</b>						
<b>TOTAL Discussion Scenario + Complete Com</b>	<b>23,850</b>	<b>261,544</b>	<b>46,635</b>	<b>88,995</b>	<b>46,635</b>	<b>88,755</b>
<i>Developments not incl in Complete Com</i>	130	25,302				
<b>TOTAL Complete Communities only</b>	<b>23,720</b>	<b>236,242</b>				<b>88,755</b>