ANALYZING HOUSING PIPELINE AND POTENTIAL IN SONOMA COUNTY
Housing Pipeline

Additional Housing Potential

Rebuild
Rebuild

Housing Pipeline

Additional Housing Capacity in Plans

Countywide Housing Potential
Historical Housing Growth - Sonoma County

- Single Family units
- Multi Family units

Source: MTC Vital Signs
REBUILD

• APPROXIMATELY 5,000 HOUSING UNITS DESTROYED.
• ANALYSIS ASSUMES THESE WILL BE RECONSTRUCTED IN PLACE.
• LOCATION AND TYPE OF UNIT KNOWN.
Rebuild Housing Type

- Single Family: 94%
- Multi-Family: 6%
PIPELINE

• PENDING DEVELOPMENT, OR PIPELINE PROJECTS, PROVIDED BY LOCAL PLANNING DEPARTMENTS

• APPROXIMATELY 16,500 UNITS IN THE PIPELINE OR RECENTLY CONSTRUCTED – CURRENT AS OF 8/16/2018

• LOCATION AND TYPE AND # OF UNITS KNOWN (ADDRESS/APN)
SONOMA COUNTY PENDING OR RECENTLY CONSTRUCTED RESIDENTIAL DEVELOPMENT - UNITS BY JURISDICTION

<table>
<thead>
<tr>
<th>Jurisdiction</th>
<th>HU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cloverdale</td>
<td>710</td>
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<tr>
<td>Cotati</td>
<td>243</td>
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<td>County</td>
<td>999</td>
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<td>Healdsburg</td>
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<td>Petaluma</td>
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<td>Sebastopol</td>
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<td>Sonoma</td>
<td>300</td>
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<tr>
<td>Windsor</td>
<td>1615</td>
</tr>
</tbody>
</table>

Current as of 8/16/2018
Sonoma County Housing Pipeline Projects
PDA vs. non-PDA location

- 59% are not in PDAs
- 41% are in PDAs

Current as of 8/16/2018
Sonoma County Pending Residential Development – Housing Type

Current as of 8/16/2018

- 42% Single Family
- 49% Multi Family
- 9% Senior/Group
Sonoma County Pending Residential Development - Project Status

Current as of 8/16/2018

- In Construction: 15%
- Pre-Application: 11%
- Approved: 42%
- Under Review: 32%
Online Map of Pipeline Projects:

http://arcg.is/1nmSXj
Estimated Rebuild and Pipeline Housing Units by Jurisdiction

- Unincorporated: Pipeline 1000, Rebuild 2000
- Windsor: Pipeline 1500, Rebuild 500
- Sonoma: Pipeline 200, Rebuild 100
- Sebastopol: Pipeline 500
- Santa Rosa: Pipeline 4500, Rebuild 2500
- Rohnert Park: Pipeline 4000
- Petaluma: Pipeline 2000
- Healdsburg: Pipeline 800
- Cotati: Pipeline 100
- Cloverdale: Pipeline 100
ADDITIONAL HOUSING POTENTIAL

- Over 21,500 units to be rebuilt or in the development pipeline
- Where could additional units be located?
- Is there capacity in General Plans?
- Is there capacity in Priority Development Areas?
WHAT IS GENERAL PLAN BUILD OUT (GPBO)?

• PROJECTION OF CAPACITY BASED ON LAND SUPPLY, INFRASTRUCTURE, AND PERMITTED DEVELOPMENT TYPES.

• SCTA STAFF ASSEMBLED COUNTYWIDE, JURISDICTION, AND TRAFFIC ANALYSIS ZONE ESTIMATES OF GPBO IN 2012 TO BE USED IN THE TRAVEL DEMAND MODELING PROGRAM.

• ESTIMATES WERE DEVELOPED WITH THE COOPERATION OF AND REVIEWED BY LOCAL PLANNING STAFF.

• SCTA STAFF HAS BEGUN THE PROCESS OF UPDATING THESE ESTIMATES.
After pipeline construction there is still some remaining estimated housing potential countywide and in PDAs.
FUTURE WORK TASKS

• **GENERAL PLAN BUILD OUT ESTIMATES** WILL BE REVIEWED AND UPDATED (LAST UPDATED IN 2012).

• **CONSTRUCTED AND EXPIRED PROJECTS** WILL BE CYCLED OUT OF THE PENDING DEVELOPMENT DATABASE NEXT UPDATE CYCLE.

• **DIFFERENT DISTRIBUTIONS OF FUTURE HOUSING** COULD BE ANALYZED USING **URBANFOOTPRINT** AND OTHER ANALYSIS TOOLS.

• **IDENTIFY CONSTRAINTS**