City of Fort Collins

FORT COLLINS CITY PLAN

PLANNING OUR FUTURE. TOGETHER.

Trends & Forces Report

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TRENDS & FORCES REPORT

Planning our future begins with understanding our past...

Since the last major comprehensive plan and transportation plan update was completed in 2011, the City of Fort Collins organization ("the City") has actively worked with the community, and local and regional partners, to implement key recommendations. However, the City and community have changed dramatically in seven years. Since 2011, Fort Collins...

- Added over 5,000 new jobs and 14,400 new residents;
- Saw its jobs to housing ratio increase from 1.18 jobs per housing unit to 1.25 indicating that employment grew at a faster rate than housing;
- Approved building permits for 7,500 new residential units and over 4 million square feet (sf) of non-residential development;
- Accelerated its climate commitment to reduce greenhouse gas (GHG) emissions by 80% below 2005 levels by 2030, and to achieve carbon neutrality by 2050;
- Saw transit ridership nearly double on the heels of the MAX line opening in 2014; and
- Adopted *Nature in the City*, with a goal of ensuring every resident is within a 10-minute walk to nature from their home or workplace.

As a result of these and other changes at the local, regional, and global scale, the plan must be brought back into alignment as the community's overarching vision and policy guide. This initial step in the process allows us to take a step back and evaluate where we are today, what trends and forces are likely to influence us in the future, what's working well (or not), and whether we have the right tools in place to help us achieve the community's vision.

This information is provided as a resource to help build shared understanding of where we are as a community today, and where we are headed in the future. It will be used as a foundation for community and stakeholder discussions and next steps in the process.

CONTENTS

About City Plan

The City Plan process will include updates to the comprehensive plan, as well as the Transportation Master Plan and the Transfort Strategic Operating Plan (also referred to as the Transit Master Plan). This integrated process will ensure policies and recommendations are closely aligned. Unless otherwise noted, all references to City Plan should be interpreted to apply broadly to all three plans.

City Plan is a multi-step process that is anticipated to run through the winter of 2018. Opportunities for public input and involvement will be provided throughout each step of the process:

START

1. **PROJECT INITIATION**
   Spring/Summer 2017
   Finalize work plan and draft community engagement plan.
2. **WHERE ARE WE NOW? WHERE ARE WE HEADED?**
   Fall 2017/Winter 2018
   Gather data to build a "snapshot" of Fort Collins today; learn about existing conditions, needs, and priorities.
3. **COMMUNITY VISIONING**
   Winter/Spring 2018
   Develop and confirm a shared community vision for the future of Fort Collins.
4. **SCENARIO DEVELOPMENT**
   Spring 2018
   Discuss several possible scenarios for the future and how our community vision could be achieved.
5. **DRAFT PLAN DEVELOPMENT**
   Spring/Summer 2018
   Develop and share a draft of the plan, including a preferred scenario, policies, and recommendations; revise the draft based on community input.
6. **PLAN ADOPTION**
   Fall/Winter 2018
   Present City Plan to the City Council for consideration of adoption.

FINISH

About the Report

This Trends & Forces Report highlights major trends and key issues affecting the City of Fort Collins that must be considered as part of the City Plan update. It includes four sections:

Setting the Stage provides an overview of basic demographic and socio-economic data about our community.

Focus Areas explores current conditions and trends specific to five focus areas that emerged as major topics for discussion during initial meetings with project stakeholders in late 2017. These focus areas include:

- Buildout and land supply
- Housing access
- Economic health
- Transportation and mobility options
- Climate action

Challenges and opportunities associated with each of the five focus areas are closely inter-related. As part of the City Plan process, they will need to be evaluated with an eye towards the "triple bottom line" to ensure the economic, environmental, and social factors and trade-offs associated with potential policy directions are carefully considered.

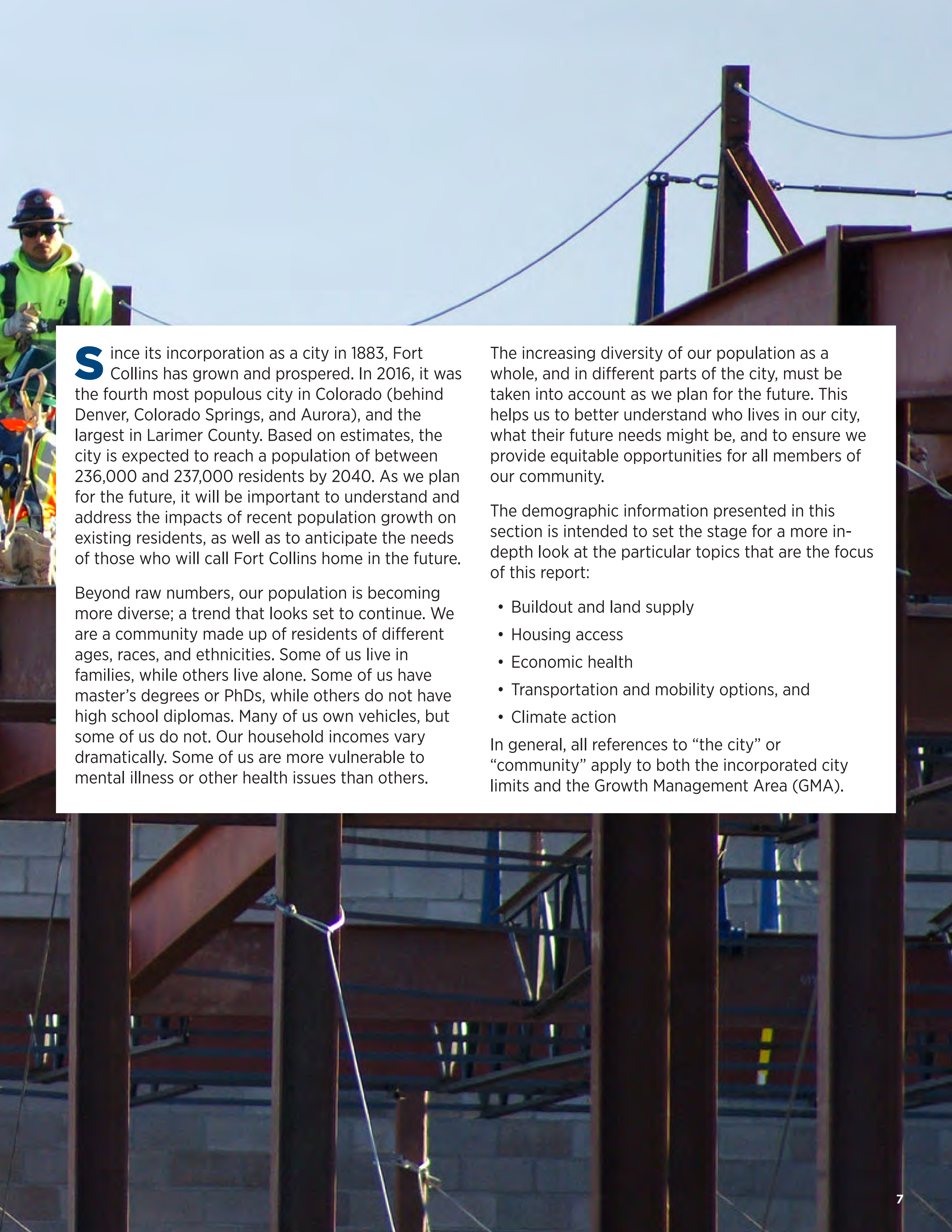
Key Choices for the Road Ahead highlights key choices and trade-offs that will need to be explored during next steps in the City Plan process in light of trends and existing conditions in each area.

Report Card provides an assessment of the successes, challenges/areas for improvement, and policy gaps that need to be addressed as part of the plan update for each of City Plan's seven outcome areas.

- Economic Health
- Environmental Health
- Community and Neighborhood Livability
- Safety and Wellness
- Culture, Parks, and Recreation
- High Performing Community
- Transportation

SETTING THE STAGE

Photo: City of Fort Collins



Since its incorporation as a city in 1883, Fort Collins has grown and prospered. In 2016, it was the fourth most populous city in Colorado (behind Denver, Colorado Springs, and Aurora), and the largest in Larimer County. Based on estimates, the city is expected to reach a population of between 236,000 and 237,000 residents by 2040. As we plan for the future, it will be important to understand and address the impacts of recent population growth on existing residents, as well as to anticipate the needs of those who will call Fort Collins home in the future.

Beyond raw numbers, our population is becoming more diverse; a trend that looks set to continue. We are a community made up of residents of different ages, races, and ethnicities. Some of us live in families, while others live alone. Some of us have master's degrees or PhDs, while others do not have high school diplomas. Many of us own vehicles, but some of us do not. Our household incomes vary dramatically. Some of us are more vulnerable to mental illness or other health issues than others.

The increasing diversity of our population as a whole, and in different parts of the city, must be taken into account as we plan for the future. This helps us to better understand who lives in our city, what their future needs might be, and to ensure we provide equitable opportunities for all members of our community.

The demographic information presented in this section is intended to set the stage for a more in-depth look at the particular topics that are the focus of this report:

- Buildout and land supply
- Housing access
- Economic health
- Transportation and mobility options, and
- Climate action

In general, all references to "the city" or "community" apply to both the incorporated city limits and the Growth Management Area (GMA).

Population

Our population will continue to grow.

Since 1950, Fort Collins has seen a more than tenfold increase in its population, growing from 14,937 residents to approximately 167,000 residents in 2017. According to estimates, the city will have a population of over 200,000 residents by 2028, and will add between 69,000 and 70,000 residents by 2040. This growth includes existing residents already living in the Growth Management Area (GMA) who will be annexed into the city over time.

Under our current land-use framework, our GMA could ultimately support approximately 250,000 residents after 2040.

The rate of population growth will remain steady.

While the rate of population growth is slowing, the total annual increase of our population will remain steady, averaging around 3,000 new residents each year between 2017 and 2040.

We are the largest community in Larimer County.

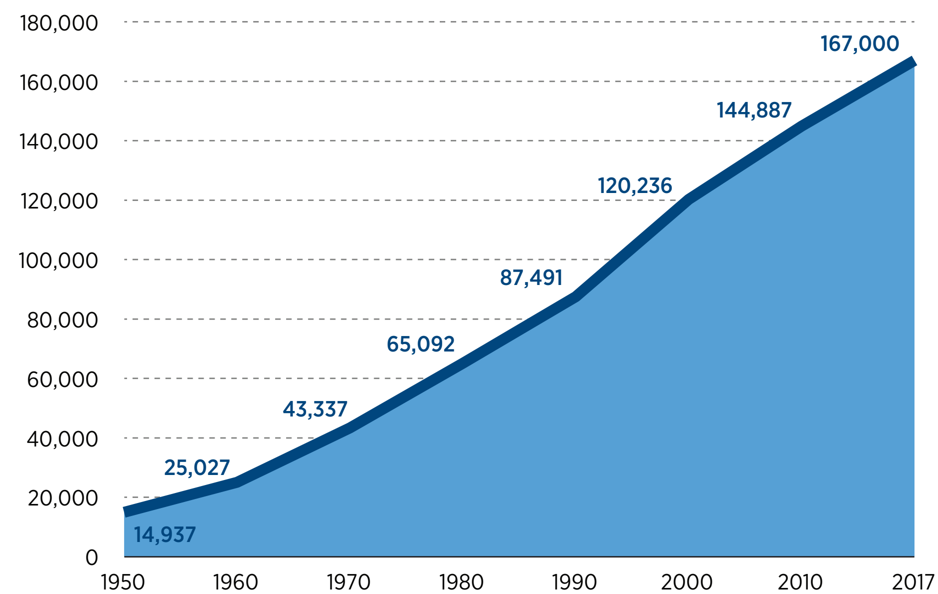
Forty eight percent of Larimer County's 338,663 residents lived in Fort Collins in 2016. This was similar to the proportion of county residents living in Fort Collins in 2000 (47%), meaning the population of residents living in the city grew at a slightly faster pace than those living elsewhere in the county over this period.

College students represent a significant percentage of our overall population.

On average, Colorado State University (CSU) students accounted for 18% of the city's total population between 2007 and 2017. The fall 2017 semester marked the largest student enrollment in history (33,413). Of these students, 28,446 (or 85%) were enrolled as resident students. CSU's campus master plan accommodates up to 35,000 students. The university expects that nonresident student enrollment will drive much of this future growth.

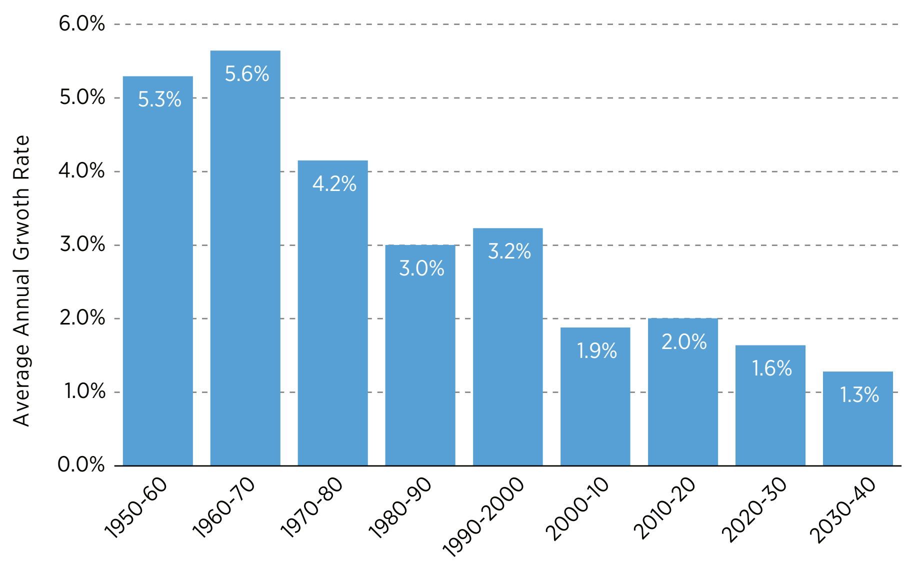
Population[1]

Fort Collins, 1950-2017

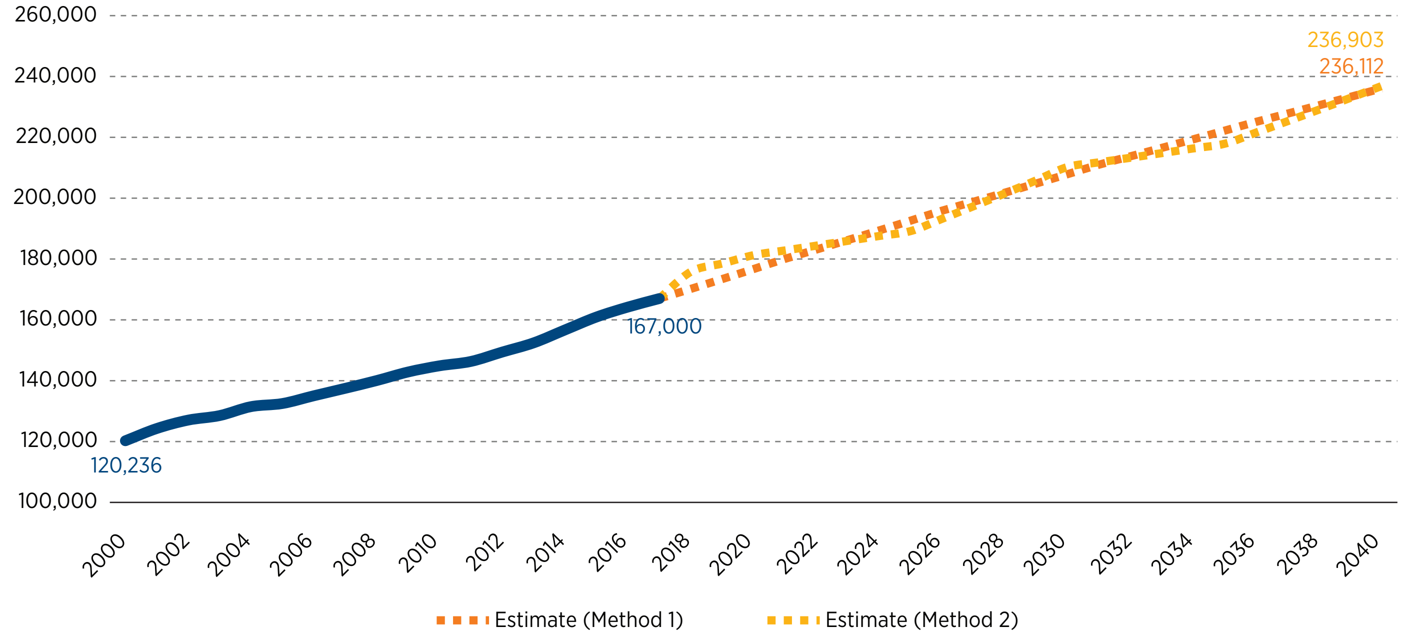


Population Growth Rates[2]

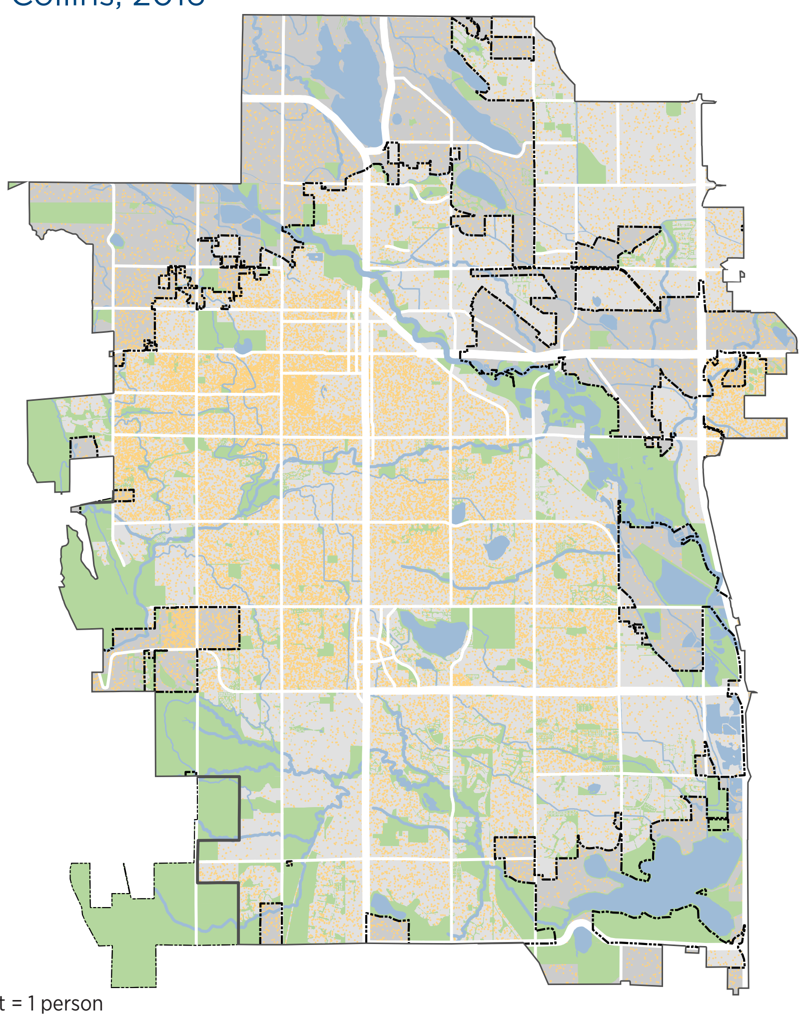
Fort Collins, 1950-2040



Estimated Population Growth[3]
Fort Collins, 2000-2040



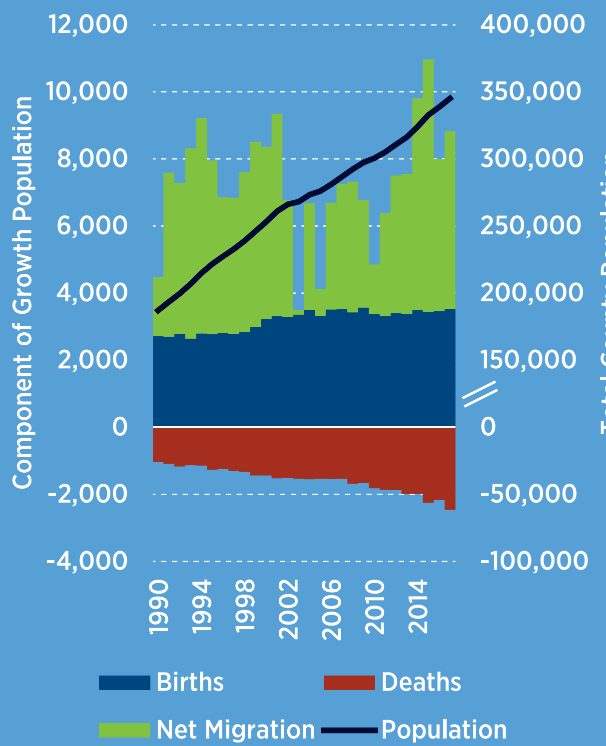
Population Density[4]
Fort Collins, 2016



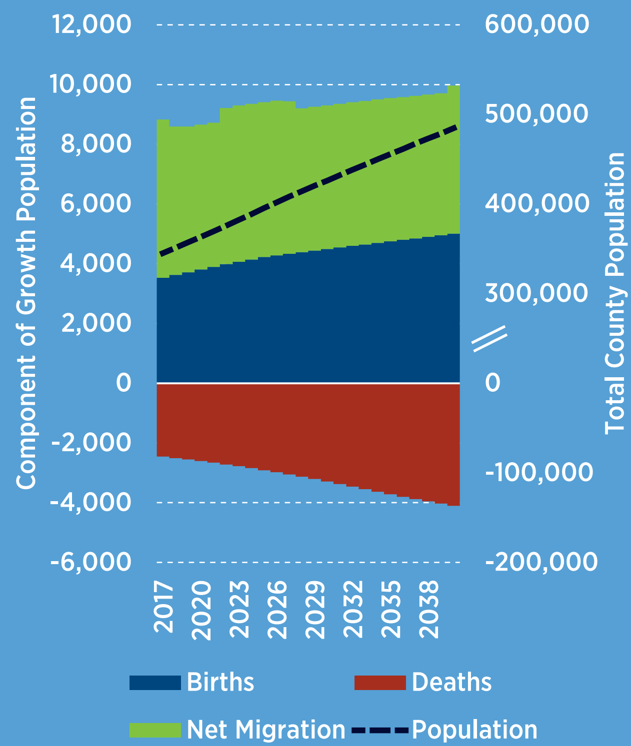
33,413
CSU ENROLLMENT[5] FALL 2017

70,000
NEW RESIDENTS[6] BY 2040

Births, Deaths, and Net Migration[7]
Larimer County, 1990 - 2017



Births, Deaths, and Net Migration[7]
Larimer County, 2017 - 2040 (Projected)



WHAT IS DRIVING OUR POPULATION GROWTH?

Population change is driven by three variables: the number of people who are born (births), the number of people who die (deaths), and net migration, the number of people moving into an area (in-migration) minus the number who move away (out-migration). When births and in-migration are larger than deaths and out-migration, a population grows; a population shrinks when the opposite is true. The State Demography Office tracks these components of population change for each county in Colorado, and makes projections for what these will be in the future.

Since 1990, births and in-migration have exceeded deaths and out-migration in Larimer County. Births have been a consistent driver of growth, but have not grown significantly between 1990 and 2017. However, in-migration exceeded out-migration throughout the same period, creating a positive net migration of people. Unlike births, in-migration has varied considerably between 1990 and 2017. For instance, net migration in 2003 contributed just 148 people to population growth, compared to 7,523 people in 2015. On average, net migration was responsible for over half of the new residents who moved to Larimer County in any given year (although, this was not true, on average, between 2000 and 2010).

On the other side of the equation, deaths have been increasing since 1990. The average annual rate of growth in the number of deaths between 1990 and 2017 (3.3%) exceeded that for births (1.0%). According to the State Demographer's forecasts, this trend will continue into the future. By 2040, there will be 1.22 births in Larimer County for every death compared to 1.44 births per death in 2017. This trend underscores the role of positive net migration as a driver for population growth. The State Demographer predicts that net migration will continue to be positive to 2040.

Demographics

Our millennial population is growing.

Millennials (residents between the ages of 20 and 34) are the largest age cohort in Fort Collins, accounting for 33% of the total population in 2016. As a cohort, millennials saw the largest amounts of growth between 2000 and 2016, increasing by 15,534 residents during this period largely driven by in-migration from outside of Fort Collins. Millennials grew at a faster average annual rate than the population as a whole between 2000 and 2016, reflecting rising enrollment at Colorado State University (CSU).

Our population is getting older.

Despite the larger population of millennials, our population is increasingly older. Our median age has increased, and the fastest rates of growth between 2000 and 2016 were seen primarily among older age cohorts. The 60 to 64 year old cohort grew at more than three-times the rate of the population as a whole.

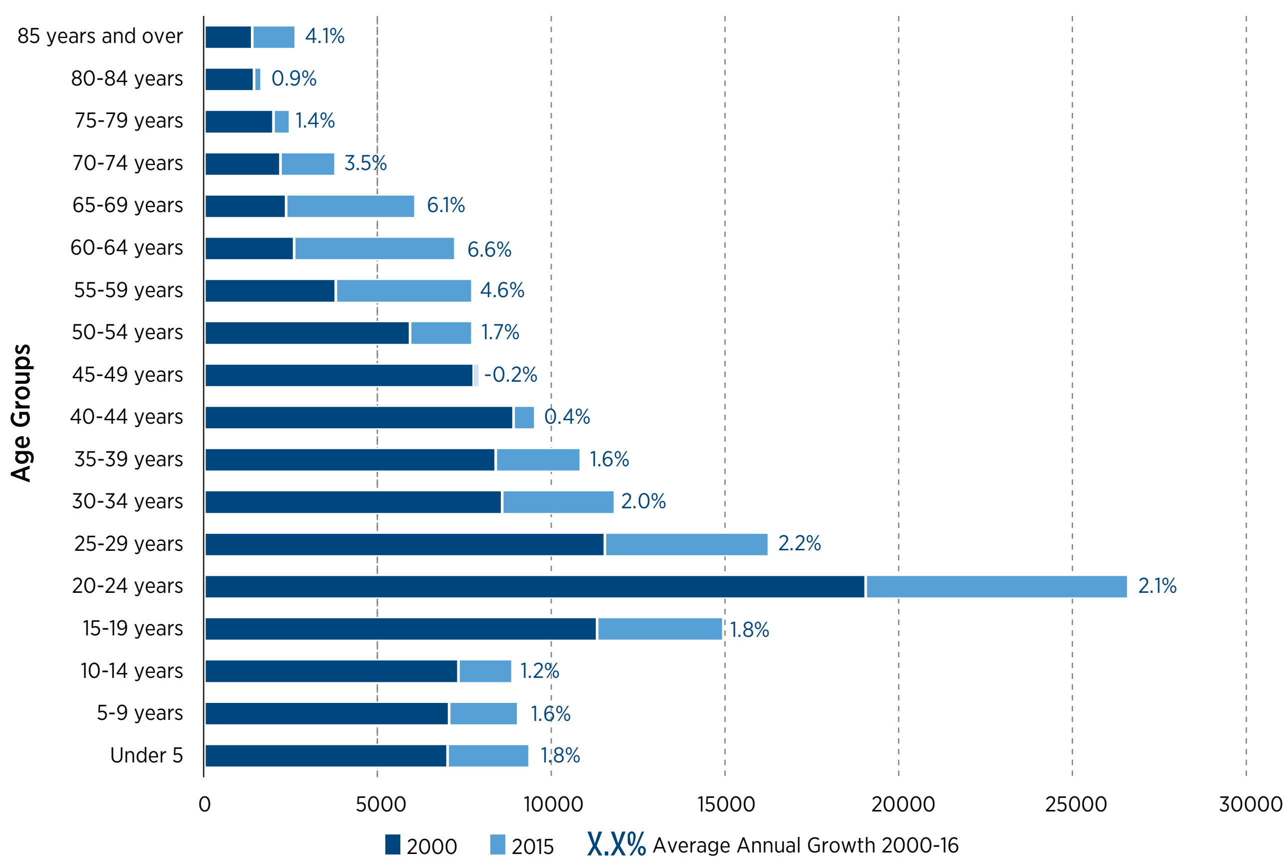
28.2
MEDIAN AGE[8]
FORT COLLINS, 2000

29.0
MEDIAN AGE[9]
FORT COLLINS, 2016

We have fewer families and fewer children.

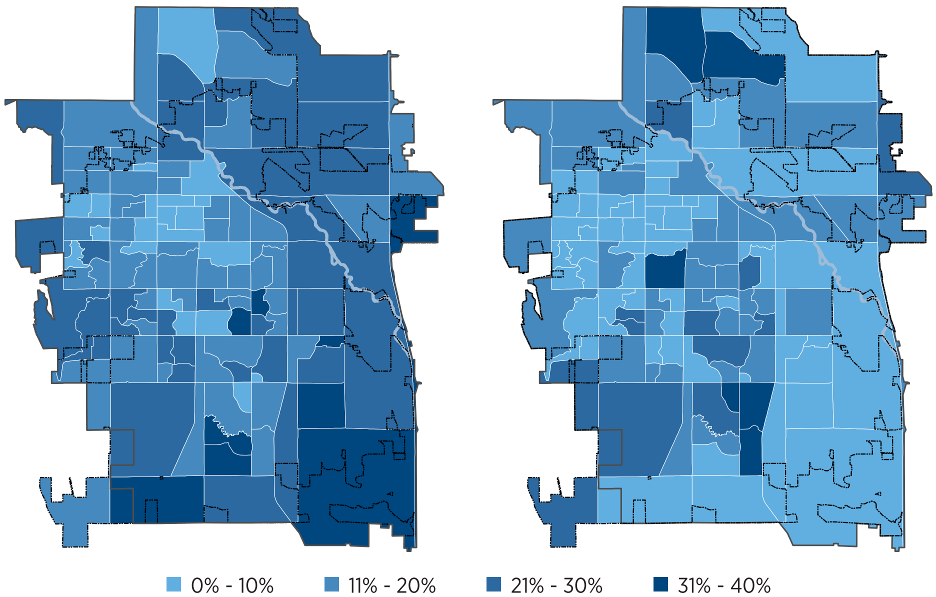
Between 2000 and 2016, the percentage of households that identified as family households decreased from 56% to 54%. Furthermore, families are increasingly made up of empty-nesters or couples who do not have children. Families with children accounted for 22% of all households in 2000, dropping to 15% in 2016. Despite this, the average family size remained stable over this period, decreasing slightly from 3.01 to 2.98 people per family. Overall, children are a smaller share of our population. The population of 10 to 14 year olds grew by an average annual rate of just 1.2% between 2000 and 2016.

Age Distribution of Population[10]
Fort Collins, 2000 and 2016



Under 18s and Over 65s by Block Group[11]

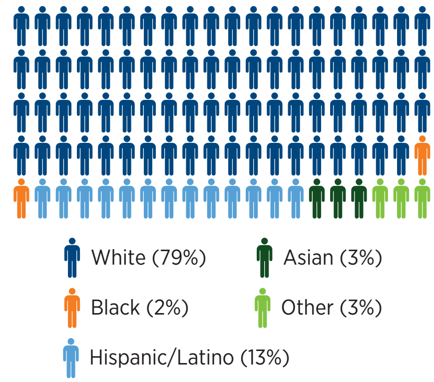
Fort Collins, 2016



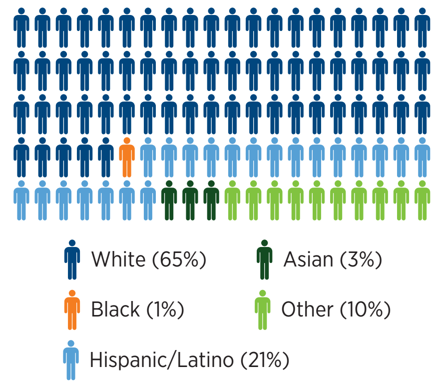
Racial/Ethnic Composition[12]

Fort Collins, 2016

2016



2016 (population under 18)



Hispanic/Latino population is growing.

In 2016, the largest minority group was Hispanics or Latinos. That year, 11% of the population identified as being of Hispanic or Latino origin compared to 9% in 2000. Far from a uniform group, 66% of residents who identified as Hispanic or Latino were of Mexican heritage, 6% were of Puerto Rican heritage, and 2% were of Colombian heritage. The remaining 26% of the Hispanic or Latino population had origins in a range of other countries in the Caribbean, Central America, and South America.

Household income growth has stagnated.

The median income for a Fort Collins household in 2016 was $59,357. While it would appear that the median household incomes increased from $44,459 in 2000, the median income actually decreased once the 2000 median income is adjusted for inflation. In 2015 dollars, the median income for a household in 2000 was $63,311, almost $4,000 more than in 2016.

$63,311

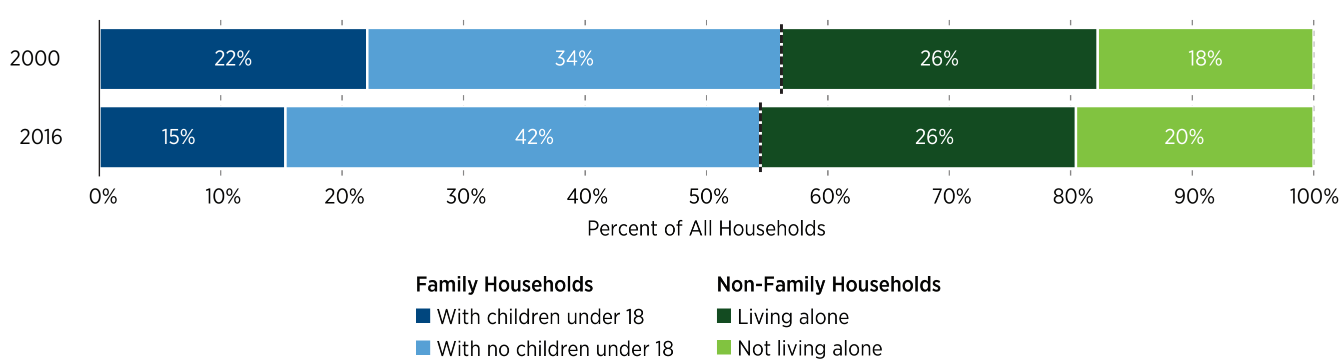
MEDIAN HH INCOME[13] 2000 (IN 2016 $)

$59,357

MEDIAN HH INCOME[14] 2016

Household Composition[15]

Fort Collins, 2000 and 2016



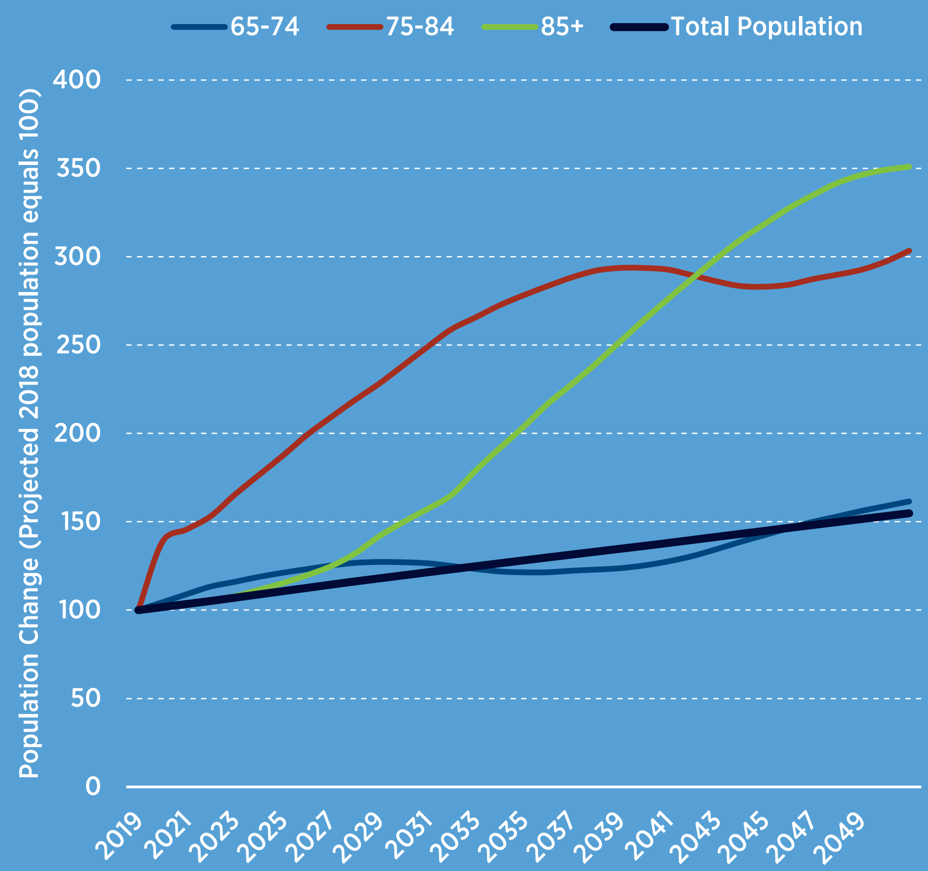
Avg. Annual Growth[16]
Fort Collins, 2000-2016

65-74	5.0%
75-84	1.2%
85+	4.1%
TOTAL POP	2.1%

Avg. Annual Growth[17]
Larimer County, 2018-2050

65-74	1.5%
75-84	3.5%
85+	4.0%
TOTAL POP	1.4%

Rate of Population Change[18]
Larimer County, 2018-2050



OUR AGING POPULATION

Despite a growing population, large number of students, and relatively low median age, the number of Fort Collins residents over the age of 65 is growing. Between 2000 and 2016, the entire population grew at an annual average rate of 2.1% while age groups older than 65 largely grew at faster rates. For example, the number of residents between the ages of 65 and 74 grew at 5%, increasing from 3.8% of the entire population to 6% during this period.

Estimates for the growth of particular age groups are only available for Larimer County, but Fort Collins is likely to see similar trends. According to the Colorado State Demography Office, the population of Larimer County will increase at an average annual rate of 1.4% between 2018 and 2050, while age groups over 65-years old will largely grow at faster rates. As shown in the chart above, the rate of growth for these age groups will vary over this period.

While initially, rates of growth will remain high for populations in the 65-74 and 75-84 age cohorts, rates of growth will begin to slow over the coming decade, even dropping below zero, before increasing again in approximately 2032 and 2042, respectively. However, the sustained growth of residents 85 and over is notable, as this age group is estimated to see rates of growth in excess of that for the population as a whole throughout most of the coming 30 years. This age group is typically most in need of long-term care and other specialized services. Expanding these and other services used by older adults will be a key consideration moving forward if we are to maintain a good quality of life for our residents and support their ability to remain in Fort Collins as they age.

POVERTY & OFF-CAMPUS STUDENTS

Measuring poverty in Fort Collins can be challenging given the presence of a large student population. Since students generally do not have time to be enrolled in a university full-time and have a full-time job, many earn incomes that would qualify them as living in poverty. However, this is not quite accurate since some (although not all) receive financial support from their school and/or their family to help them cover living expenses incurred while attending school. While on-campus students are not included in poverty measures, those living off campus are counted, inflating the poverty rate in Fort Collins as measured by the US Census.

To account for this, the US Census provides estimates of poverty rates excluding students living off-campus. The Census estimated that 13.5% of students in Fort Collins lived off-campus in 2016. When they are included in poverty measures, the rate of poverty was estimated to be 17.8%. However, when off-campus students were excluded, this estimate dropped to 10.1%, a difference of 7.7%. Across all block groups in the city, there was a strong positive correlation between the presence of undergraduate students and poverty. Variations in the number of undergraduates explained 62% of the variation in poverty rates found across block groups, a significant amount for a single variable.

Household incomes vary by the race/ethnicity of householders.

Although the median household income for all households was $59,357 in 2016, household incomes varied depending on the race of the household. White households (not of Hispanic or Latino origin) had a median income of $62,804 while median incomes for non-white racial and ethnic groups ranged from $36,750 for American Indians/Alaskan Natives to $42,333 for Blacks/African Americans.

More of our residents are living in poverty.

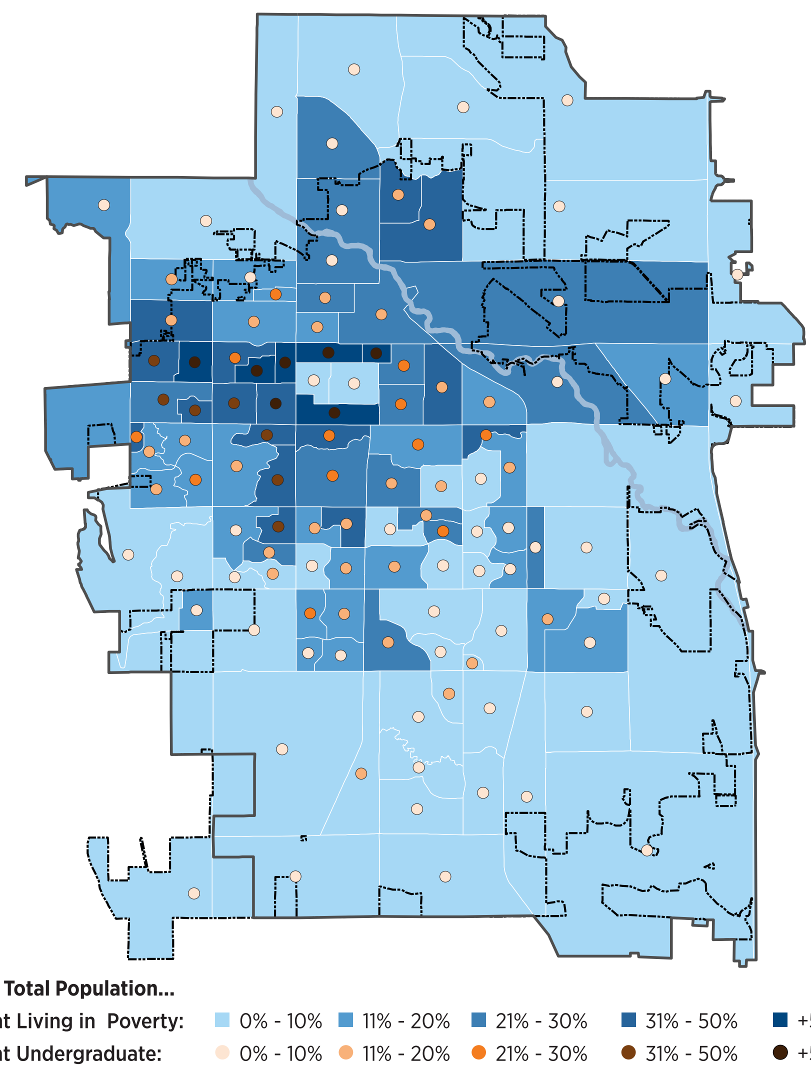
The rate of residents living in poverty has increased from 14% in 2000 to 17.8% in 2016. Excluding students living off-campus, the poverty rate was estimated to be approximately 10.1% in 2016. Estimates for poverty excluding students are not available for 2000.

Our homeless population is small, but has grown.

Point-in-time homeless counts indicate that Fort Collins' population of homeless individuals was 290 in 2016, up from 250 in 2013.

Relationship Between Poverty Rates and Undergraduates[19]

Fort Collins, 2016



Educational attainment varies by race/ethnicity.

The majority of our population 25 and over has a secondary degree or more; however, educational attainment varies significantly among different racial and ethnic groups. For example, 59% of Whites (not of Hispanic or Latino origin—the majority of the city's residents) had received a bachelor's degree or higher in 2016, compared to 42% of Hispanics or Latinos (the city's largest minority group). Similarly, rates of residents without a high school diploma were highest among minority populations, particularly Hispanics and Latinos (13%). Hispanic and Latinos 25 and over account for 10% of this age group citywide, but account for 37% of residents with less than a high school diploma, and 5% of residents with a bachelor's degree or higher.

Max Educational Attainment[20]

Fort Collins, 2016

4% NO HIGH SCHOOL DIPLOMA

15% HIGH SCHOOL ONLY

17% SOME COLLEGE, NO DEGREE

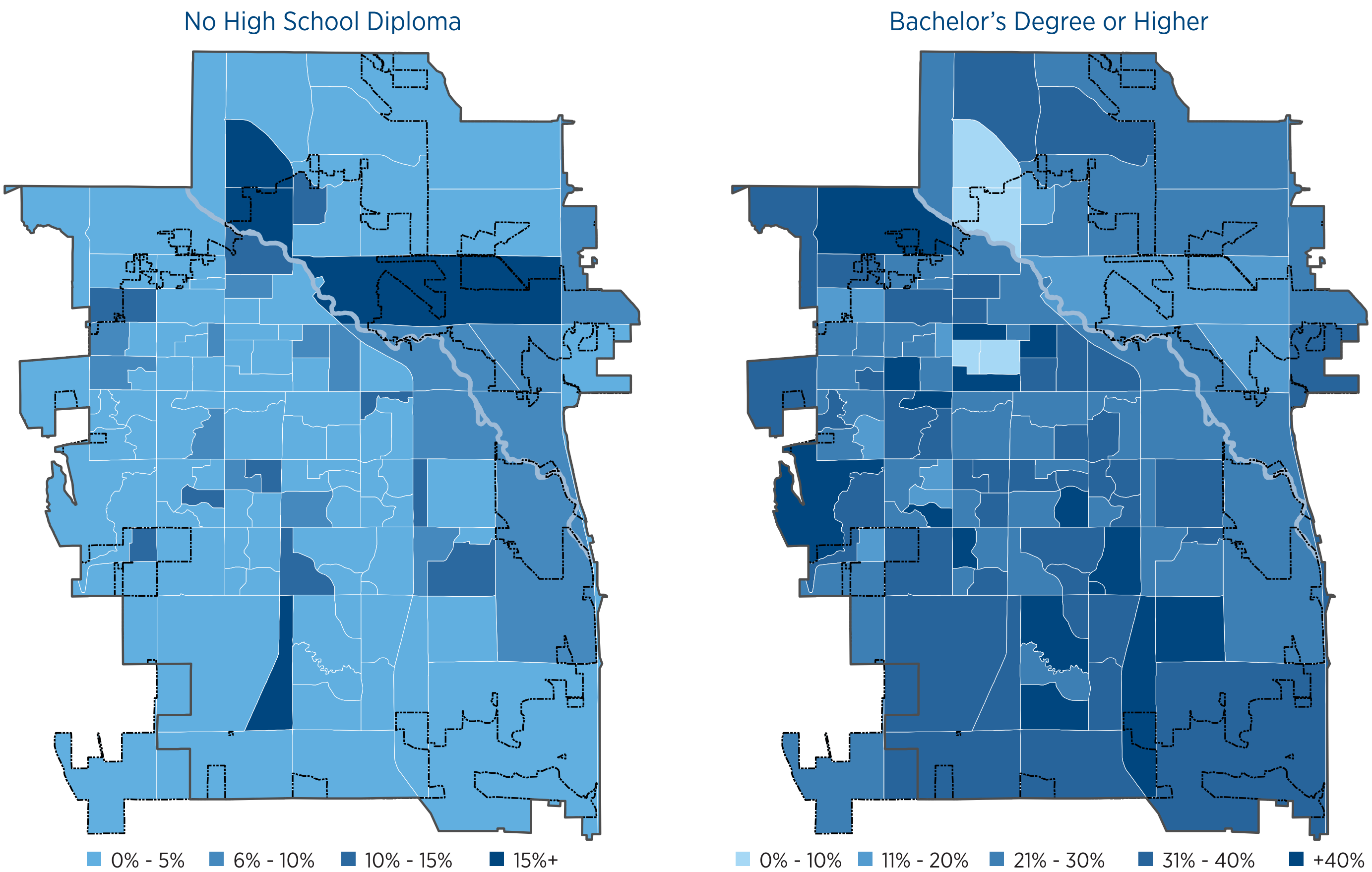
57% BACHELOR'S DEGREE OR HIGHER

SOCIAL DETERMINANTS OF HEALTH[22]

Social determinants of health are the social and physical conditions of a person's life that influence their personal health and well-being: education, income level, access to health care, social and community context, and neighborhood/built environment. Research shows that residents that live in poverty and have lower levels of educational attainment are more likely to have poor health outcomes and will also be more vulnerable to impacts from climate change. Understanding this linkage is an important factor in planning for health equity.

Educational Attainment[21]

Fort Collins, 2016



HEALTH & EQUITY INDEX

The Health & Equity Index was developed by the Larimer County Department of Health and Environment, and is a tool to identify potentially vulnerable areas of the community. It is a weighted index, made up of two calculated scores to determine geographic areas of highest needs. The first component includes an Equity Score, comprised of socioeconomic factors using the most recent American Community Survey (U.S. Census) estimates:

Equity Indicators

- Population under 18
- Population over 65
- Households at or below the federal poverty level
- Hispanic/Latino population
- Non-white (minority) population
- Households without a vehicle
- Disability status

The second component, the Health Score, is comprised of health indicators from 500 Cities Data (Center for Disease Control):

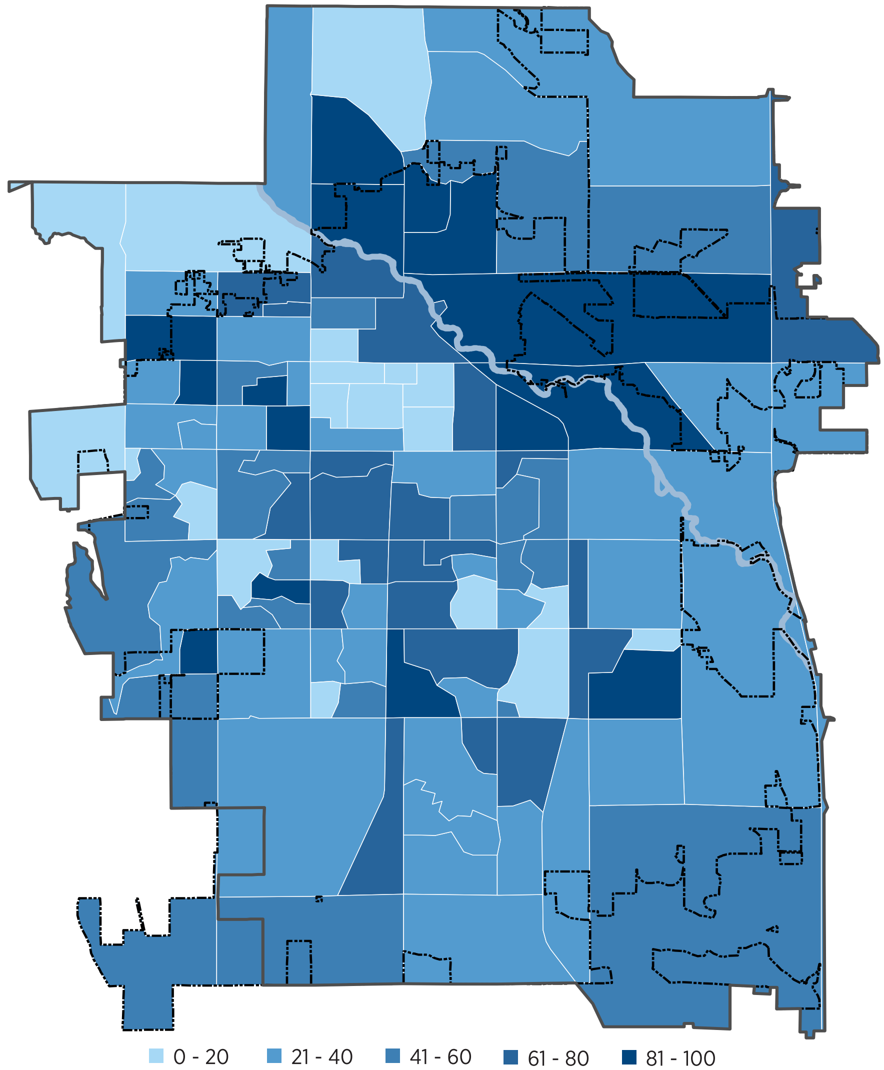
Health Indicators

- Adult obesity
- Adults with no leisure time physical activity
- Adults who experienced poor mental health for more than 14 days

Final scores range from 0 to 100, with 100 indicating the highest priority.

Health & Equity Index Scores[23]

Fort Collins, 2016



The health equity index analysis shows that factors related to health equity are not equal in all parts of Fort Collins. Generally, Census block groups with low index values (i.e., less vulnerable or disadvantaged populations) are clustered around downtown, while block groups with high index values are clustered north of the Poudre River.

What Does It Mean for City Plan?

Planning for the impacts of future growth in the city and region.

A growing population means that City Plan will need to provide guidance on where and how to accommodate approximately 70,000 additional residents over the coming decades. This includes considerations for the types of housing and employment the plan should encourage (and where), as well as the types of services and amenities the City will need to provide in the future. Growth also has implications for the City's climate action goals; more people generally means more greenhouse gas emissions. Balancing growth with efforts to reduce greenhouse gas emissions will be essential if we are to remain on track to meet our goal of being a carbon neutral community by 2050. The implications of regional growth on the city will also need to be considered. The effects of growth outside the city's GMA directly influences Fort Collins and vice versa. For example, more people living outside the GMA—either by choice or because they can't afford to live in Fort Collins—could lead to more in-commuting, adding vehicles to our transportation system and increasing greenhouse gas emissions.

Providing more inclusive and accessible outreach and engagement opportunities.

A more diverse population means the City may need to change the way it provides information to residents or seeks input during public engagement processes. Historically, the City has not fully accessed members of the community who might be experiencing disenfranchisement from City processes and services and will need to seek new ways to reach all sectors of the population, including youth and those with limited English proficiency (LEP). In support of the City's strategic objective to promote inclusion and diversity, culturally proficient outreach and programming efforts will need to reflect and support our community's existing diversity as well as demographic changes likely to occur in the future. Accessing a diverse range of experiences, perspectives, and identities will be critical in the City's efforts to co-create a welcoming, inclusive community that equitably and proactively serves all residents. Recent research has also shown that more residents are using their mobile devices when interacting with the City's webpages. With this in mind, the City will need to seek ways to better tailor information for mobile users.

Promoting equity and access to opportunities.

Who you are and where you live in Fort Collins can place you on a different path than a resident from a different background or part of the city. While City Plan alone cannot solve issues of inequality, the update process should look at potential updates, additions, or other changes to the plan through the lens of equity to ensure that policies do not disproportionately burden one group over another. As our city becomes more diverse, it will be important to understand the barriers facing certain groups or neighborhoods (whether they be related to poverty, health, employment, educational attainment, ages, etc.) to ensure all residents have access to the services, resources, infrastructure, and opportunities they need.

Adapting to the needs of a changing population.

Demographic trends will influence the type and level of services needed in the future. For instance, the growth in residents over the age of 65, coupled with the decline in families with children and slow growth in residents under the age of 19 suggests greater future demand for programs and services geared towards seniors. The City may also wish to explore forces that deter young families from living in Fort Collins, such as access to housing, child care, or entry-level jobs. In addition, continued focus will be needed on protecting the quality of life considerations valued by existing residents and demanded by the city's younger and growing workforce.

FOCUS AREA #1: BUILDOUT & LAND SUPPLY

Photo: City of Fort Collins

Since the first version of City Plan was adopted in 1996, the City of Fort Collins has promoted a compact development pattern by encouraging higher densities in infill and redevelopment areas, preserving environmentally sensitive areas and rural lands, establishing community separators to keep us a distinct community from our neighbors, and providing efficient public services. These values are reflected by the Structure Plan map and accompanying land use policies in City Plan which have guided us for many years as we've planned for the eventual buildout of our city. Together, these tools are used to guide the location, character, and intensity of development.

The establishment of the City's Growth Management Area (GMA) and successful partnerships with Larimer County and surrounding jurisdictions have helped to encourage compact growth and ensure that parks, open space, and agricultural land will continue to play an important role in the city's overall land use pattern. Although the GMA boundary has helped reinforce the city's infill and redevelopment focus over time, most residential development that occurred over the past decade occurred outside of areas currently targeted for infill and redevelopment in City Plan.

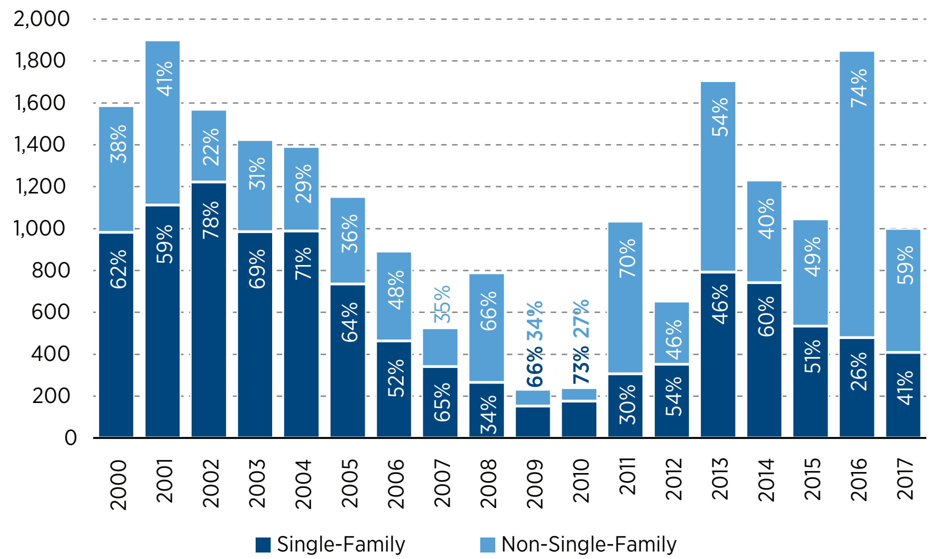
Due to our commitment to implementing a fixed growth management area, vacant buildable land within Fort Collins and its GMA is becoming increasingly scarce. If current development trends continue, the city will exhaust its supply of buildable land by 2040. If not, we expect our available vacant land will support a population of around 250,000 residents at full buildout. In addition, much of the remaining vacant land is not served by City sewer and water utilities, which could impact the availability, timing, and pricing of future development in these areas.

As we look to the future, it is important to consider how we might best use the limited supply of vacant land and that remains to meet our future needs and to support the development of the types of places residents would like to see in our community. Community desires for open space, access to nature, less traffic, and preserving the character of established neighborhoods will need to be considered along with other community desires and goals, such as becoming a carbon neutral community, water supply reliability, discouraging sprawl, and supporting the development of affordable and workforce housing.

Where We Are Today

Residential Units Permitted[24]

Fort Collins, 2000-2017



Residential development trends have fluctuated significantly.

Residential development trends have fluctuated since 2000. Permits peaked in 2001 and bottomed out in 2009 during the Great Recession. Since 2010, residential development has been trending upward, with strong years seen in 2013 and 2016. However, since 2009, 9,000 new residential units were built in Fort Collins compared to 11,237 between 2000 and 2008.

Housing built today features more apartments than single family homes.

Since 2000, single-family units as a share of total units built have been declining. Between 2000 and 2008, single-family units (both attached and detached) accounted for 63% of all residential units built. In comparison, single-family units accounted for 44% of all units built between 2009 and 2017. Overall, 55% of the dwelling units built since 2000 have been single-family units.

Commercial development hasn't returned to pre-recession levels.

Commercial development activity between 2000 and 2017 peaked in 2001 (with 94 projects permitted) before declining to just 16 projects permitted in 2009. The average number of projects permitted between 2009 and 2017 was around half the number permitted between 2000 and 2008. Given trends in retail, a return to pre-recession levels of development is unlikely in the future.

Infill and redevelopment is increasing.

Over the past five years, a greater share of new residential units have been constructed in already-developed parts of the community like Downtown, near CSU, and along the College Avenue corridor. New mixed-use and multi-story buildings, many geared towards college students, have replaced older single-story commercial and retail buildings. This type of development, called 'infill and redevelopment,' is likely to continue in the coming years as the supply of vacant buildable land in the Growth Management Area diminishes.

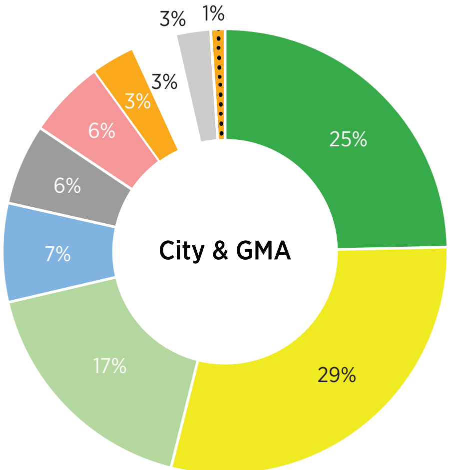
Development is limited between Fort Collins and surrounding communities

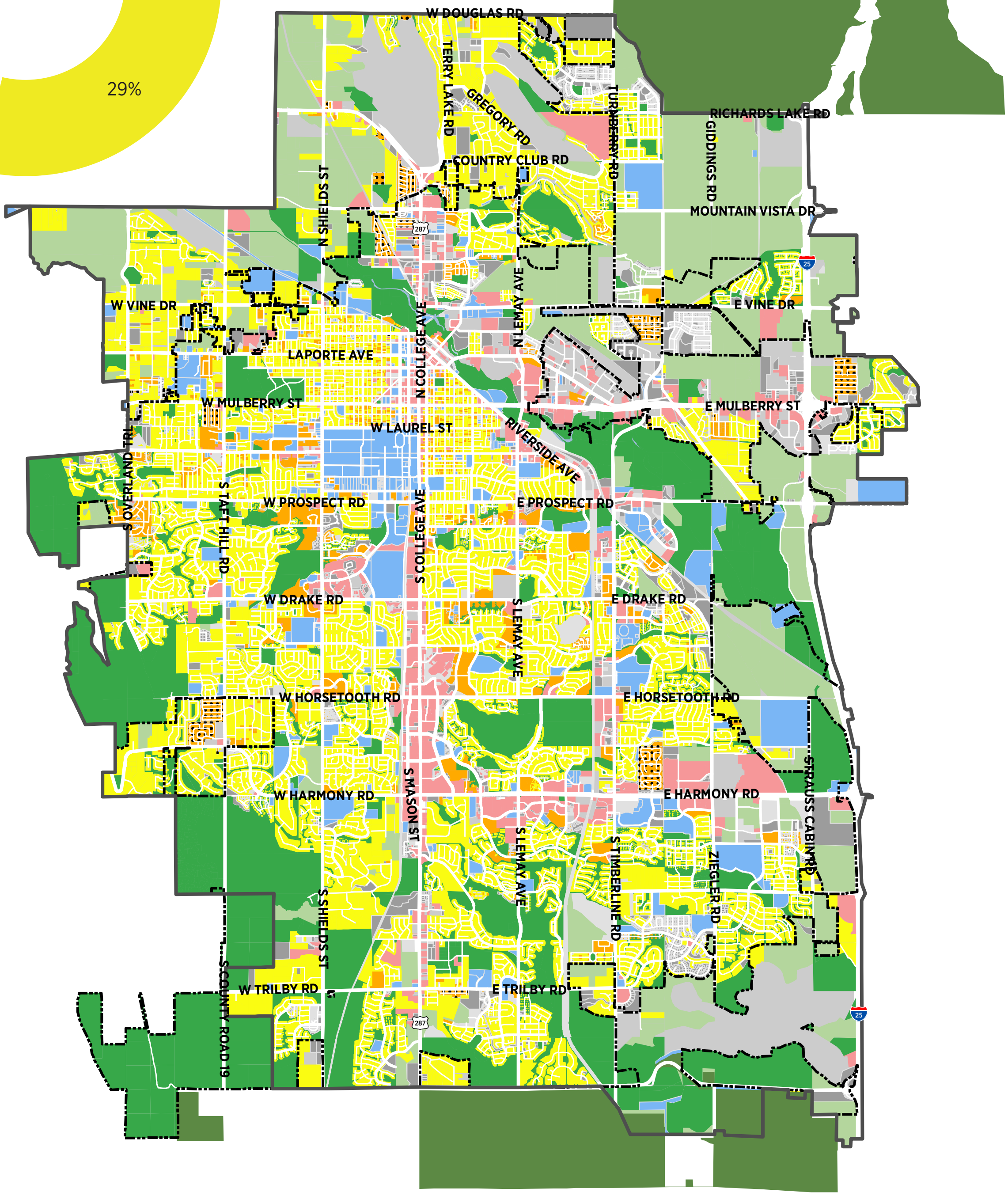
Comparatively little development has occurred in areas immediately north and south of the Fort Collins Growth Management Area where community separators have been established with Loveland and Wellington. A combination of protected open space, conservation easements, and low intensity zoning serve to protect agricultural uses, limit contiguous development, and create a physical separation from nearby communities.

The eastern boundary of the Growth Management Area has seen more development activity as new retail and commercial development occurs along I-25 in Timnath and Windsor. Fort Collins' land use framework envisions a mix of uses along our eastern boundary and I-25, including protected open space near the Poudre River, and a mix of commercial and industrial land further north near Prospect Road and Mulberry Street.

Existing Land Use[25]

Fort Collins & Growth Management Area, 2017





- Low-Density Residential
- Medium- & High-Density Residential
- Mobile Homes
- Commercial
- Industrial
- Public/Quasi-Public
- Agriculture
- Parks, Natural Areas, and Open Space
- Community Separators
- Vacant
- Other

Recent Development Activity[26]
Fort Collins, 2000-2017

Type of Development
- Single-Family Detached
- Single-Family Attached/Multifamily
- Commercial
- Mixed-Use

City Plan Development Areas
Activity Centers

Targeted Infill and Redevelopment Areas

1 Downtown

2 Colorado State University

3 North College

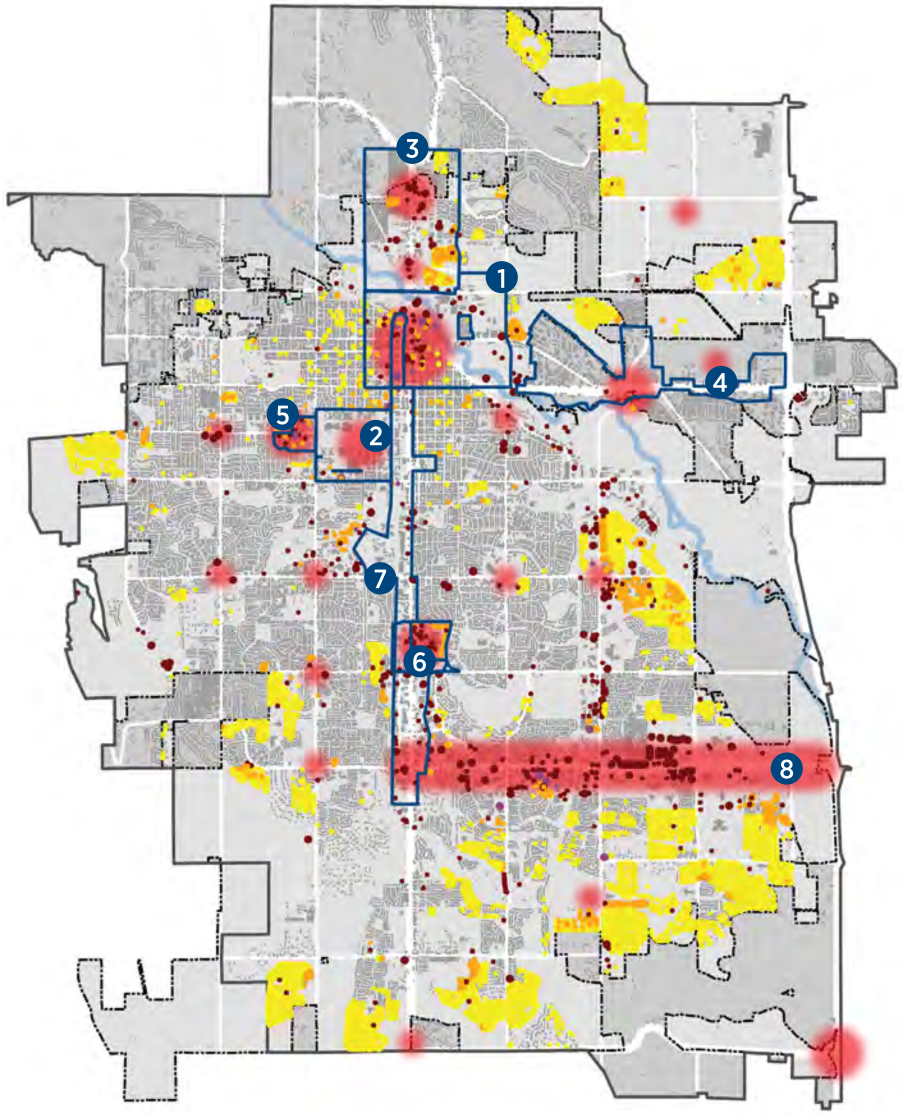
4 East Mulberry Corridor

5 Campus West

6 Foothills Mall

7 Midtown Corridor

8 Harmony Corridor



Residential development occurs primarily at the city's periphery.

Between 2000 and 2017, the majority of new residential development occurred on vacant land in areas at the periphery of the city. New development during this period included a number of large subdivisions, such as Bucking Horse, Rigden Farm, and Timbervine. However, non-residential development has clustered around particular nodes, such as in downtown and along the Harmony and Mulberry corridors. Generally, the economic gravity of the city has shifted from US 287 to I-25.

More commercial development is occuring within Targeted Infill and Redevelopment Areas.

City Plan identifies Targeted Infill and Redevelopment Areas within Fort Collins where the City would focus on reducing barriers to infill and redevelopment and concentrate investments in infrastructure. Only 20% of the residential units built in Fort Collins since 2012 (the first full year following the adoption of the most recent version of City Plan) were located in one of these areas. On the other hand, nearly 56% of commercial square feet developed in the city since 2012 was located in a Targeted Infill and Redevelopment Area. However, development activity in core areas has picked up since 2012. More than half of all residential and non-residential development that has been built in the Targeted Infill and Redevelopment Areas since 2000 occurred in the last five years. This may in part be due to an increasingly constrained land supply.

Where We're Headed

6,900
VACANT ACRES FORT COLLINS, 2017[27]

9,580
VACANT ACRES FORT COLLINS, 2008[28]

Vacant buildable land is a small portion of the GMA.

There remains approximately 6,900 acres of vacant buildable land remaining within Fort Collins and its Growth Management Area (GMA) that is not protected as a park, natural area, or open space. This represents 14% of the GMA. Of this vacant land, 62% of the acreage is located within the city limits, with the remaining 2,600 acres located in the GMA. Many areas of vacant and buildable lands are also constrained by natural hazards, such as flood and/or geologic hazards.

Our supply of vacant land is decreasing.

There were approximately 9,580 acres of vacant land in the GMA in 2008, 2,680 more acres than in 2017. This represents a loss of 298 acres per year during this period. Should this trend continue, the city will exhaust its supply of vacant land by 2040, the planning horizon for this update to City Plan.

Most vacant land is zoned for residential uses.

Approximately 60% of vacant buildable land in the city's GMA has a zoning designation that would support some residential development. Under current zoning, these vacant lands could accommodate 25,736 housing units. Based on current zoning, 36% of these units would be low-density housing types, under 5 dwelling units per acre (du/ac), 37% would be medium-density housing types (5-20 du/ac), and 27% would be high-density housing types (over 20 du/ac). In addition, vacant land within the city and GMA could support up to 21.8 million square feet of non-residential development. The majority (44%) of this development could support employment uses. An additional 6.9 million square feet of commercial/ mixed-use development and 5.3 million square feet of industrial uses could be built on vacant land.

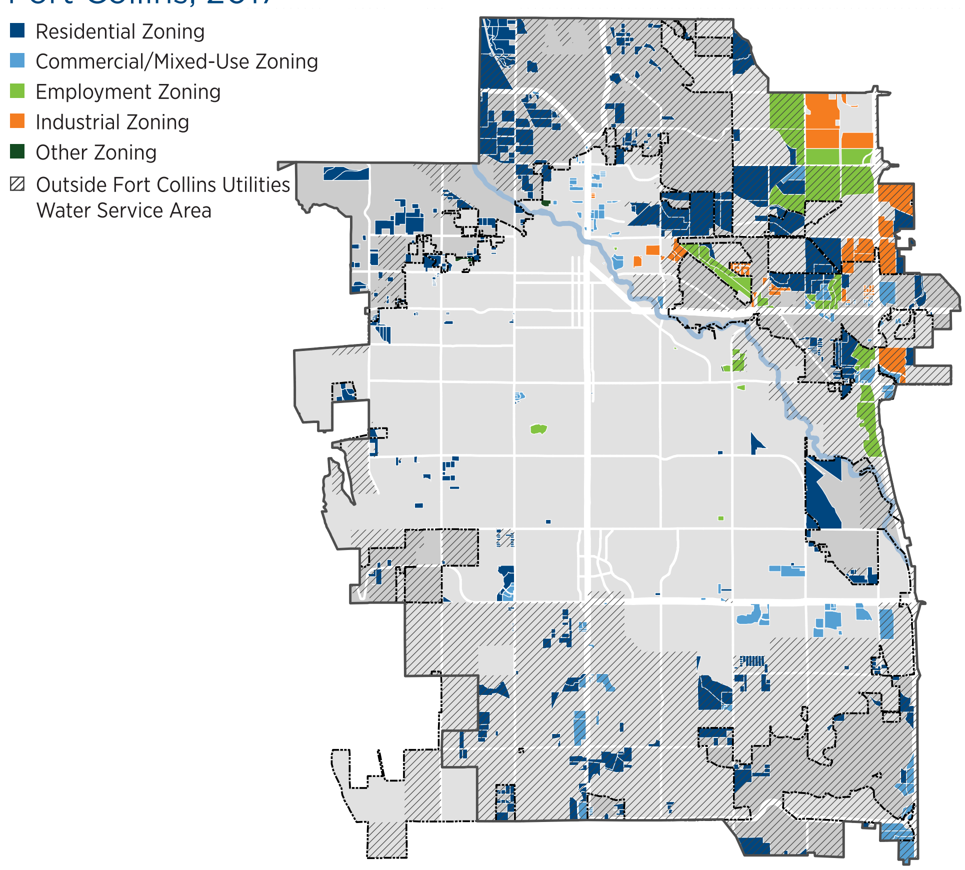
A majority of vacant lands are not served by Fort Collins water and sewer utilities.

A majority of remaining vacant lands are not served by Fort Collins water and sewer utilities. The city will need to create and enhance partnerships with regional utility providers aailable throughout the GMA.

Potential for more supply through redevelopment.

A number of parcels within the city and GMA are likely to redevelop in the future. In total, it is estimated that approximately 2,700 dwelling units and 3.7 million square feet of non-residential development could be supported through redevelopment. These are conservative estimates—more capacity could be available

Vacant Lands, by Land Use[29]
Fort Collins, 2017



depending on the density of development on these parcels, and the amount of redevelopment that occurs in the future.

Redevelopment can support higher-densities

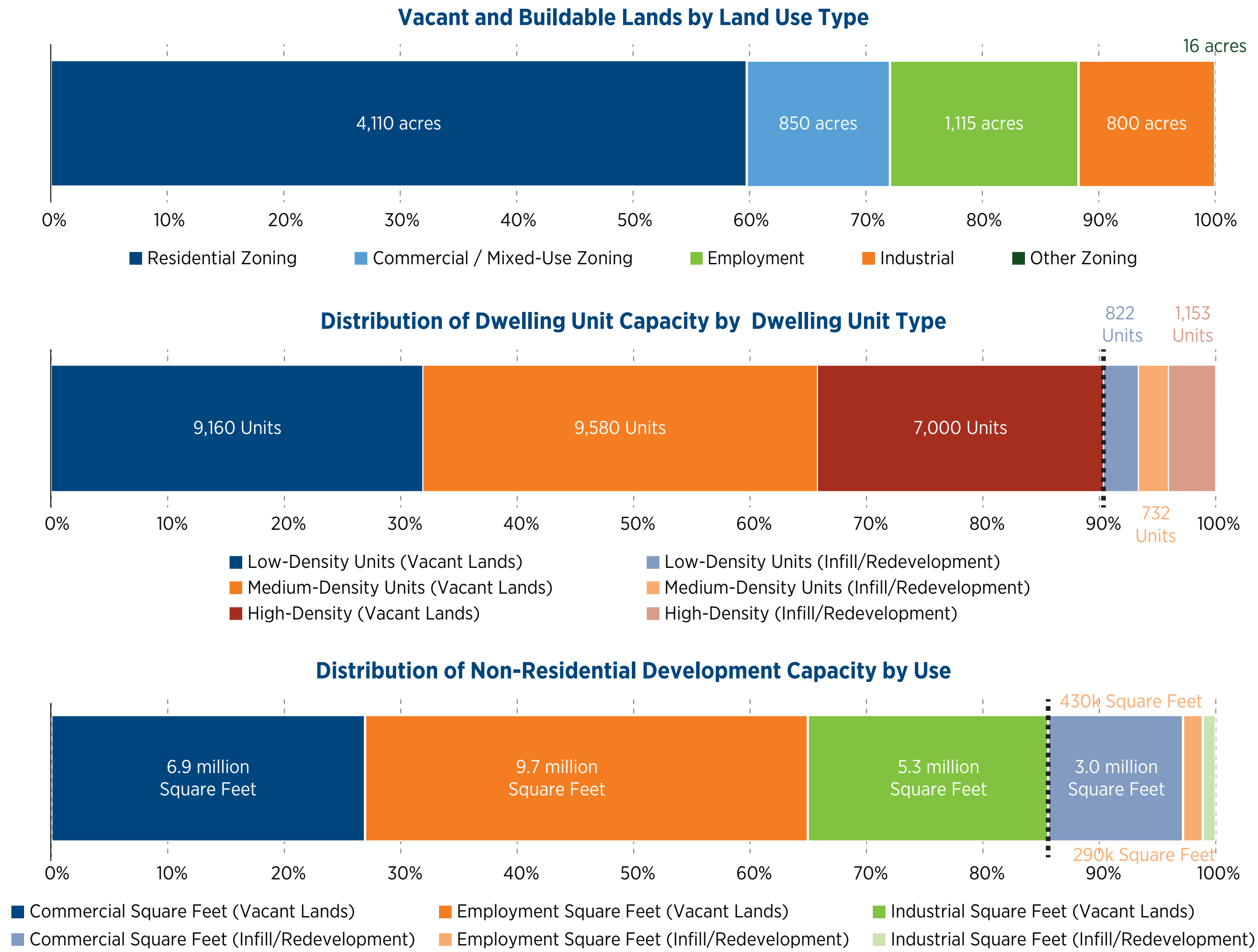
Of the 2,700 dwelling units that could be created through redevelopment, the majority (43%) would be high-density housing (greater than 30 du/ac) based on current zoning. Of the 3.7 million square feet of non-residential redevelopment, nearly 80% will support commercial/ mixed-use development. Very little additional employment or industrial capacity is likely to be added through redevelopment.

The supply of land is not sufficient to meet our future housing needs.

Assuming infrastructure and other constraints are addressed, a forecast of future housing needs indicates that demand fo rhousing will exceed th city's capacity by around 2,000 units by 2040. While the supply of non-residential land is generally sufficient for our future needs, available land may not be development ready or in lcoations that are competitive for capturing future employment growth. A more in-depth discussion on supply and future demand for residential and non-residential development can be found in **Focus Area #2: Housing Access**, and **Focus Area #3: Economic Health**.

Characteristics of Development Potential [30]

Fort Collins & GMA



What Does it Mean for City Plan?

Encouraging the efficient use of remaining vacant land.

Development activity in the GMA is increasingly constrained by a limited supply of vacant land. Based on current trends, our supply of vacant land will be exhausted by 2040. Through the City Plan process, it will be important to explore through growth scenarios where and how future growth can be accommodated to meet expected demand—whether through the continuation of recent development trends (in terms of typical densities and mix of uses), the targeted expansion of the GMA, a continued focus on infill and redevelopment in priority areas, or a combination of these approaches. A key part of this discussion will be to establish a clear understanding as how different growth scenarios support—or detract from—the City's ability to meet its climate action and affordable housing targets and other community goals.

Preserving community character.

City Plan policies emphasize the role of higher-density infill and redevelopment in helping to achieve other community goals, such as housing diversity and affordability, and access to transit and other services. However, tensions around compatibility and community character are growing. More discussion is needed as part of future growth scenarios to confirm the desired end state and rationale behind infill and development in different parts of the city, and to ensure the updated plan provides increased clarity on the types of transitions and character-defining features that are appropriate in different community contexts.

Consideration of the dynamic between land, infrastructure availability, and cost.

Most of the vacant land in the GMA is not served by City sewer and water utilities. This dynamic could impact the availability, timing, and pricing of future development in these areas. City Plan growth scenarios and any potential updates to the Structure Plan map and accompanying land use policies will need to take this dynamic into account, particularly as it relates to housing affordability and the availability of development ready employment land.

FOCUS AREA #2: HOUSING ACCESS

Photo: City of Fort Collins

The demographic composition of Fort Collins is changing. Mirroring state and national trends, older age cohorts (particularly over the age of 65) will represent a larger percentage of the City's population in the future. However, younger adults are moving to Fort Collins in increasing numbers—attracted by employment opportunities and quality of life. This trend is expected to continue. As a result, the composition of demand for housing in Fort Collins will undoubtedly shift. Some of these shifts are being driven by younger residents who prefer housing options that are walkable to jobs, retail, and entertainment, and from older residents who no longer have kids and the desire and/or ability to maintain their single family home.

Since 2000, Fort Collins and Larimer County have produced more jobs than housing units, and this imbalance has recently accelerated. At the same time, rents and home prices in Fort Collins are increasing faster than wages.

These pressures have made housing affordability an increasingly important issue as the City and its regional partners work to ensure the ability for residents of any economic status and income to live and work in Fort Collins.

Where We Are Today

Our supply of housing has grown...

There were 66,689 housing units in Fort Collins in 2016, an increase of nearly 18,930 units since 2000. This 2% annual rate of growth matched closely with that seen in all of Larimer County over this same period.

...but not as quickly as our supply of jobs.

Since 2010, the rate of job growth in Larimer County as a whole has out-paced the rate of housing development. Between 2010 and 2016, the county saw jobs increase by an annual average rate of 3.2%, while the number of housing units increased by just 1.3% over this same period.

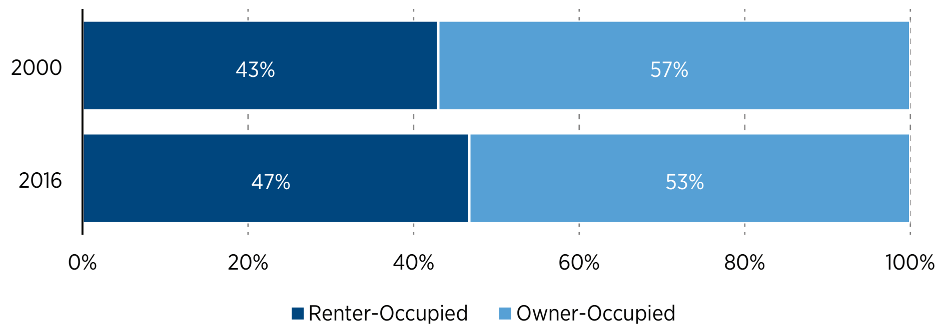
Housing vacancy rates indicate a tight market.

Since 2000, the housing unit vacancy rate has increased from 3.9% to 4.4% in 2016. Generally, vacancy rates have been below what is considered optimal (vacancy between 5% and 7%) since 2000.

Fewer young people own homes.

While overall the number of households who rent their homes has increased in Fort Collins, this shift has been much more pronounced among residents younger than 34. Between 2000 and 2016 the number of residents in this age group who owned their home dropped from 28% to 20%. This 8% shift was much greater than the 4% shift seen for all age groups over this same period.

Tenure of Households[32]
Fort Collins, 2000 & 2016



Rates of homeownership greatest among older residents.

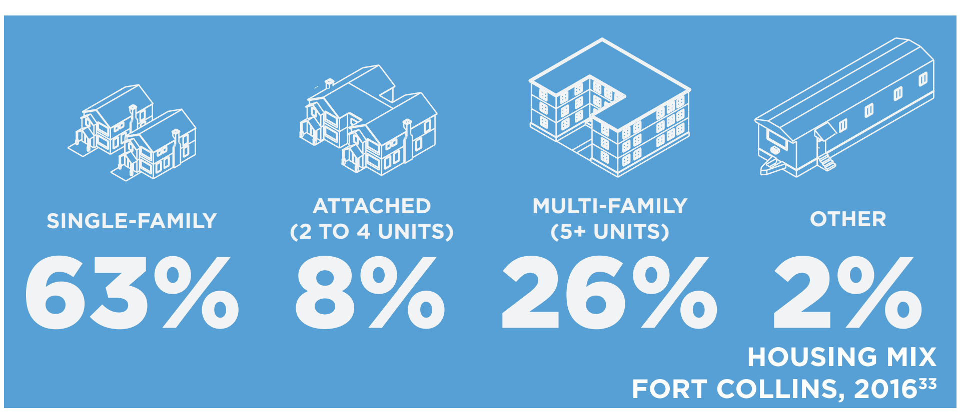
Across all age groups, approximately 57% of households lived in homes that they owned. However, there is significant variation in rates of homeownership within different age groups. Only 20% of householders under 35 owned their homes in 2016 compared to 70% of householder over 35.

Our mix of housing today is similar to 2000.

Despite an increase in multifamily development seen over the past few years, the overall mixture of housing types (defined by the number of units in a residential structure) has stayed almost the same as in 2000. While the percent of units that were single-family homes did not change between 2000 and 2016, the share of multi-family housing (5 units or more) grew slightly over this period.

Home prices in Fort Collins are increasing faster than incomes.

The median sales price of a home in Fort Collins has increased from $187,522 in 2000 to $352,000 in 2017 (as of October). Since 2000, the median sales price grew at an average annual rate of 4.4%, much faster than the average annual rate of growth for household median income (1.8%). Prices have grown at an even faster rate since 2010, increasing by 7% on average each year.



Rents are also increasing faster than incomes.

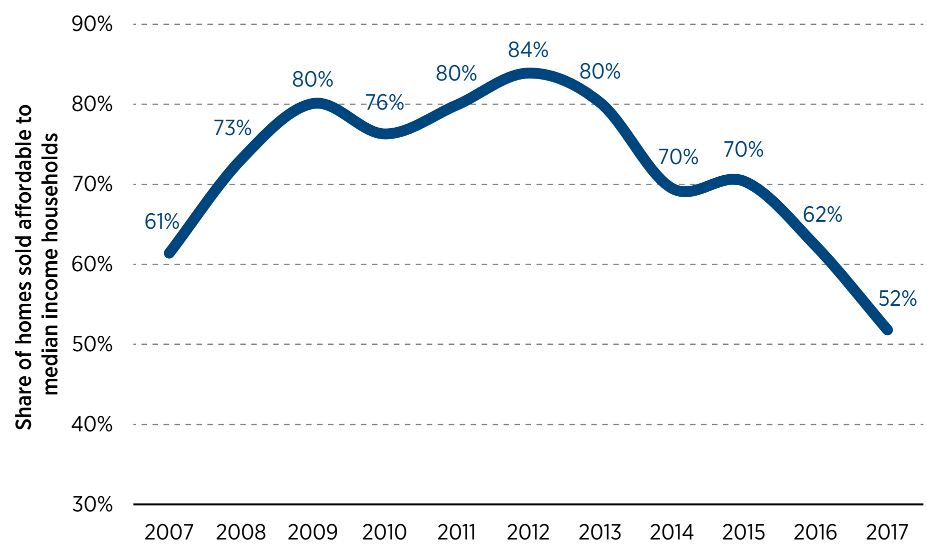
During the third quarter of 2017, the average monthly apartment rental rate in Fort Collins was $1,310. This marks an increase from 2000 when rental rates were $658, nearly half of rents today. The annual rate of growth in monthly rents was similar to that seen for for-sale housing, increasing at a rate of 4.1% between 2000 and 2017, compared to the 1.8% increase seen in median incomes over the same period.

Our rental market continues to be tight.

The vacancy rate of apartments in Fort Collins during the third quarter of 2017 was 3.7%. Generally, economists consider vacancy rates below 5% to be indicative of a tight rental market. Vacancy rates have been below 5% in Fort Collins since 2009.

Housing Opportunity Index[34]

Fort Collins, 2007-2017

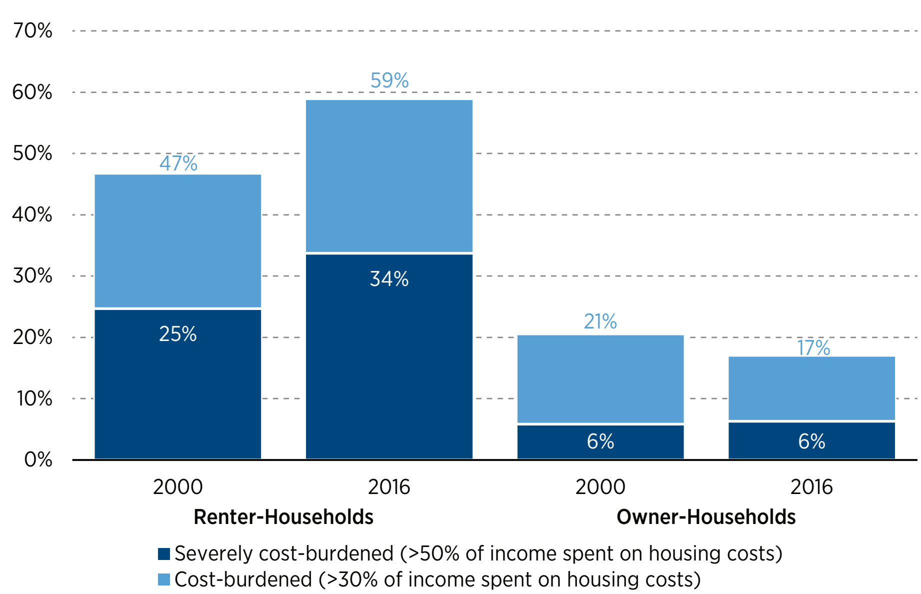


The number of cost-burdened households is increasing.

Households paying more than 30 percent of income on housing are considered to be cost-burdened. Among all households, 38% spent more than 30% of their incomes on housing costs in 2016 compared to 34% in 2000.

Housing Cost Burden for Renters & Homeowners[35]

Fort Collins, 2000 & 2016



Renters are feeling the crunch more than homeowners.

In 2016, 59% of renter households paid more than 30% of their income towards rent compared to just 17% of owner households. The incidence of owner households paying more than 30% of their income towards rent decreased since 2000, but increased for renter households over this same period. This does not necessarily mean that housing for owners became more affordable. Over this same period the number of lower-income household who owned homes decreased, suggesting these homeowners moved into rental housing.

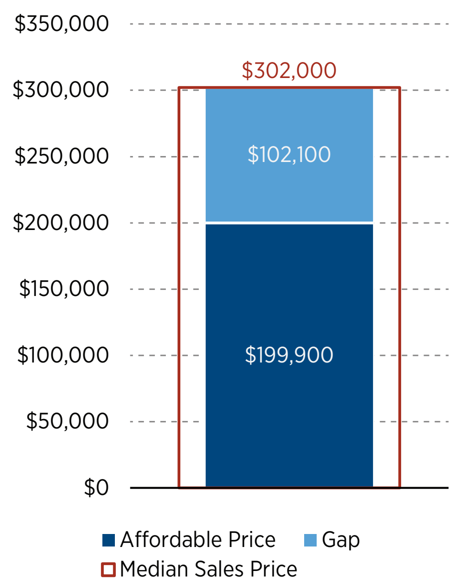
The housing affordability gap is widening.

In 2016, the median household income was $59,357. With this income, the median household could afford a home of approximately $199,900. However, the median home price in 2015 was $302,000, a gap of over $100,000. This gap has widened since 2015, as the median home price has grown to over $350,000.

Meeting the City's affordable housing goals will continue to be a challenge.

The City's goal is for 6% of the housing stock to be affordable (deed restricted/income restricted housing units) to households earning less than 80% of the area median income by 2020. Currently, 4.8 percent of housing units are deed or income restricted. The City needs to add just short of 200 units per year for the next four years to achieve its 2020 goal. The City's long term goal is to have affordable units account for 10% of the housing stock by 2040, an increase of around 5,500 units from today.

Housing Affordability Gap[37]
Fort Collins, 2015



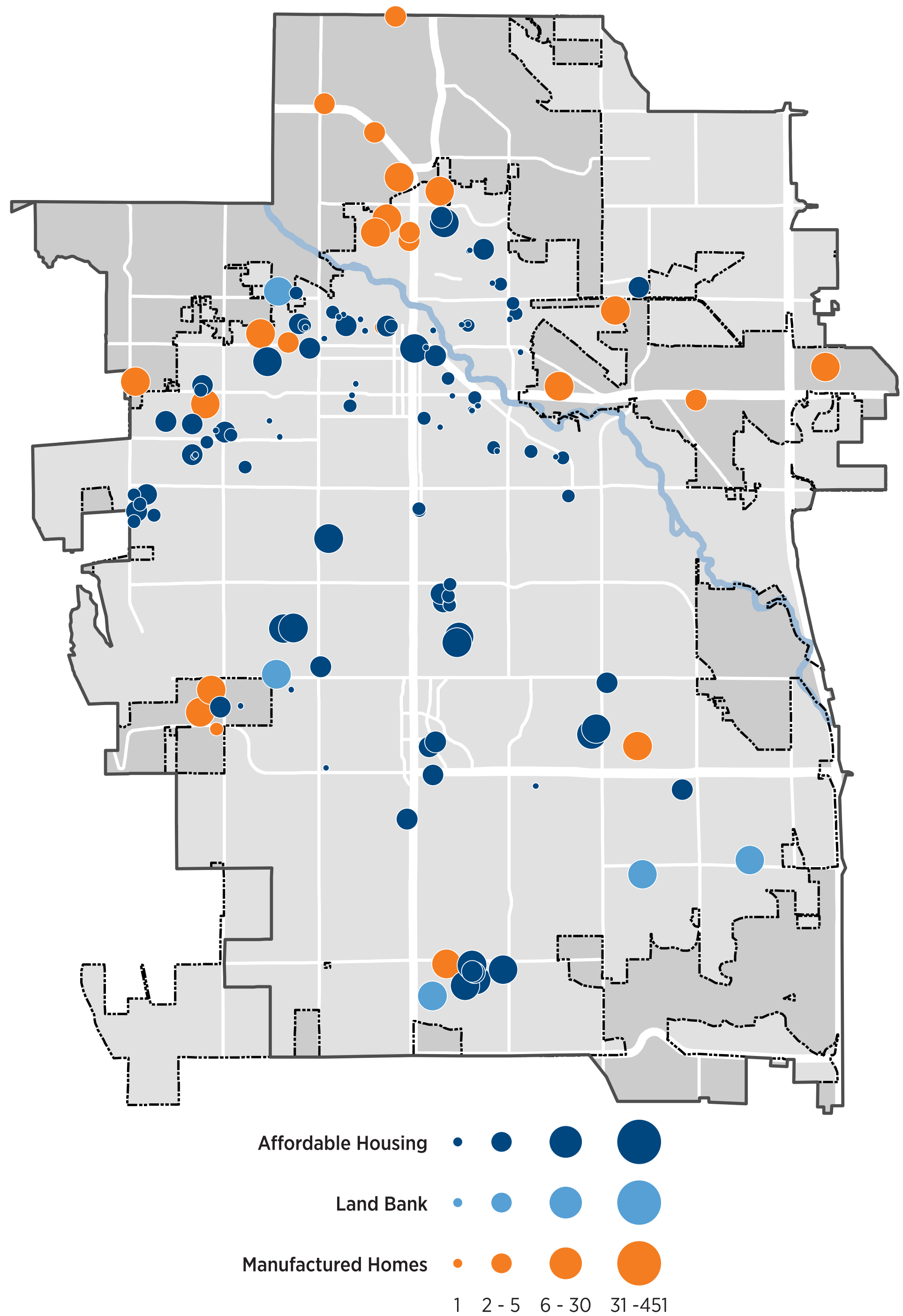
3,236

AFFORDABLE UNITS, 2017[38]

4.8%

AFFORDABLE UNITS, 2017[38]

Affordable Housing, Land Bank, and Manufactured Homes[36]
Fort Collins, 2017



Note: Manufactured or mobile homes are not designated as affordable units, but may represent a below-market rate housing option.

Where We're Headed

Demand for housing will exceed supply.

A forecast of future housing demand was completed as part of the City Plan update process to better understand demand for different housing types among different types of households by the year 2040. The demand forecast found that population growth will result in demand for approximately 30,480 additional housing units by 2040. This is about 2,000 more units than the 28,440 units that could be built on vacant buildable land or through redevelopment in Fort Collins. However, this does not hold true for all housing types. A surplus of around 4,200 medium-density units is anticipated, while low-density and high-density housing are likely to have shortages of around 3,700 and 2,500 units, respectively.

Demand will be greatest for low- and high-density housing.

Demand for low-density (5 dwelling units per acre (du/ac) and under) and high-density (20 du/ac and over) housing will account for around 45% and 35% of the additional demand for housing by 2040, respectively. The remaining 20% of units demanded are estimated to be medium-density housing types (between 5 and 20 du/ac) such as duplexes, townhomes, and small condo or apartment buildings. As noted at left, capacity is most constrained for low-density and high-density housing.

High-density housing will make up a larger share of our housing.

If the supply of housing follows estimated demand, the share of housing that is a high-density housing type will increase. In 2016 approximately 10% of housing units were high-density. This share is expected to increase to 18% by 2040.

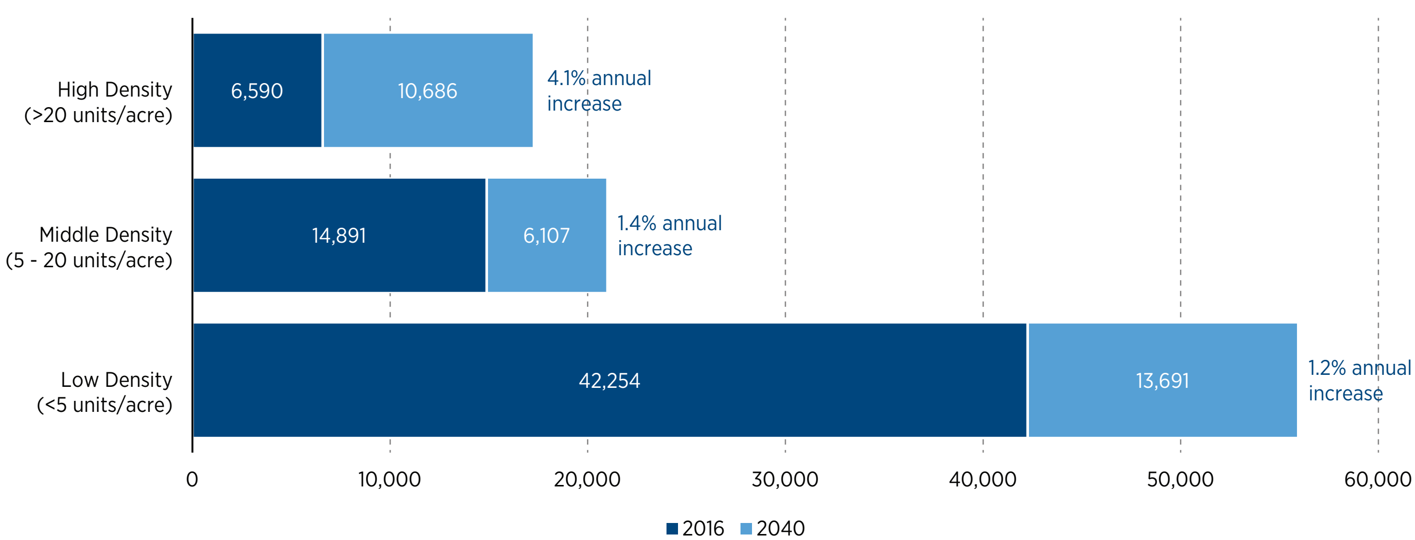
Fewer young people will own homes.

If the trend observed over the past two decades continues, the share of younger households (under 35) is estimated to decrease by 2040. Rates of homeownership for households in all other age groups is expected to stay the same over the next 20 years.

Affordability will impact demand.

The affordability of housing in the future will impact housing demand. Should the gap between median home prices and median incomes continue to widen through 2040, less households may be financially able to own homes. Since the majority of rental housing is in multi-family homes, the demand for medium- and high-density housing could be higher than what is forecasted.

Estimated Housing Demand[39]
Fort Collins, 2016 - 2040



What Does it Mean for City Plan?

Exploring a variety of ways to meet housing demand.

Housing demand through 2040 is anticipated to exceed supply through new development on vacant lands. Demand will be greatest for low- and high-density housing. Encouraging greater utilization of remaining land is one possible approach to help match anticipated housing demand. Key policy choices that accompany that approach include consideration of increased densities in certain locations, and/or shifting some of the remaining employment land in the GMA to residential uses.

Expanded housing options.

Despite strong policy support in the current version of City Plan, diversification of the city’s mix of housing types has been slow to occur. Possible strategies to help implement a broader diversity of housing types include removing barriers to certain types of residential development in the zoning code (e.g., accessory dwelling units), requiring higher minimum densities in areas where a broad range is supported by the community, requiring a mix of unit types for larger developments, and/or allowing for more mixed-use development in commercial and employment zones.

Proactive efforts to create affordable housing.

The City continues to pursue a range of strategies in collaboration with regional partners as it works toward its goal of having 10% of all units as affordable by 2040. At the same time, housing prices and rental rates continue to rise and employment growth continues to outpace housing growth. Both of these trends add pressure to the housing market, limit housing options for certain segments of our population, and have contributed to an increased amount of in-commuting. Review and refinement of the Structure Plan map and a continued focus on ongoing regional collaboration are needed to promote balanced growth opportunities and ensure mismatches in development trends do not continue to exacerbate affordability issues.

‘Missing Middle’ Housing

Townhomes, condominiums, and smaller multi-unit buildings remain a small fraction of new dwellings permitted and constructed in the community. Often referred to as ‘missing middle’ housing, these products create greater housing diversity in neighborhoods and may be more attainable for those just entering the housing market or an option for those looking to downsize. Encouraging the development of more missing middle housing types will require a thorough examination of current development incentives, standards, market preferences and feasibility. The role of lending practices and the regulatory environment for construction defect liability will also impact the possible development of missing middle housing options.

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FOCUS AREA #3: ECONOMIC HEALTH

Photo: City of Fort Collins

The economic strengths of Fort Collins are aligned with the identity of the community. Home to Colorado State University and located at the base of the Rocky Mountains, Fort Collins is a community rooted in quality educational options and natural assets and amenities that promote and encourage a healthy lifestyle. The two largest industries in Fort Collins, Education and Health Care, reflect these major assets, which have produced an educated workforce and a high quality of life. Together these have historically attracted large employers in manufacturing and technology to locate in the city.

Fort Collins is also the center of a growing region as the County Seat of Larimer County. Significant growth in the region and along the Front Range of Colorado over the past 20 to 30 years has shifted economic activity within Northern Colorado, creating multiple economic centers. This increased regional competition is both a threat to economic opportunities and also a growing opportunity to promote the region as major destination for a variety of employers and workers.

As the City looks to promote a healthy and sustainable economy grounded in community values, City Plan will have to address several emerging trends and issues including the growing impacts of climate change, regional and national competition for employers and workers, housing affordability, and land constraints. The City is actively working to address these issues through its Economic Health Strategic Plan, which focuses on community prosperity, growing our own, place-making, the climate economy, and thinking regionally.

Where We Are Today

The economies of communities in the region are increasingly intertwined.

Fort Collins is the largest city (in terms of population) and economy (in terms of jobs) along the northern Front Range. While in the past, cities in our region (Fort Collins, Loveland, and Greeley) have functioned as stand-alone communities with distinct economies, they are increasingly intertwined. As a result, regional economic activity has shifted somewhat away from traditional downtown/city centers towards the I-25 corridor.

Larimer County employment growth has been steady.

The county has grown steadily in employment over the past 30 years, with periods of accelerated employment growth. Employment in the county grew by 4.5 percent annually from 1990 to 2000. Two national economic recessions in 2001 and 2008-09 reduced the rate of employment growth in the county to 0.8 percent annually between 2000 and 2010. Since 2010 however, the county has begun to grow at a faster rate (3.2 percent annually from 2010 to 2016), producing more new jobs annually in this period than in the 1990s. Larimer County had a total employment of 153,100 in 2016.

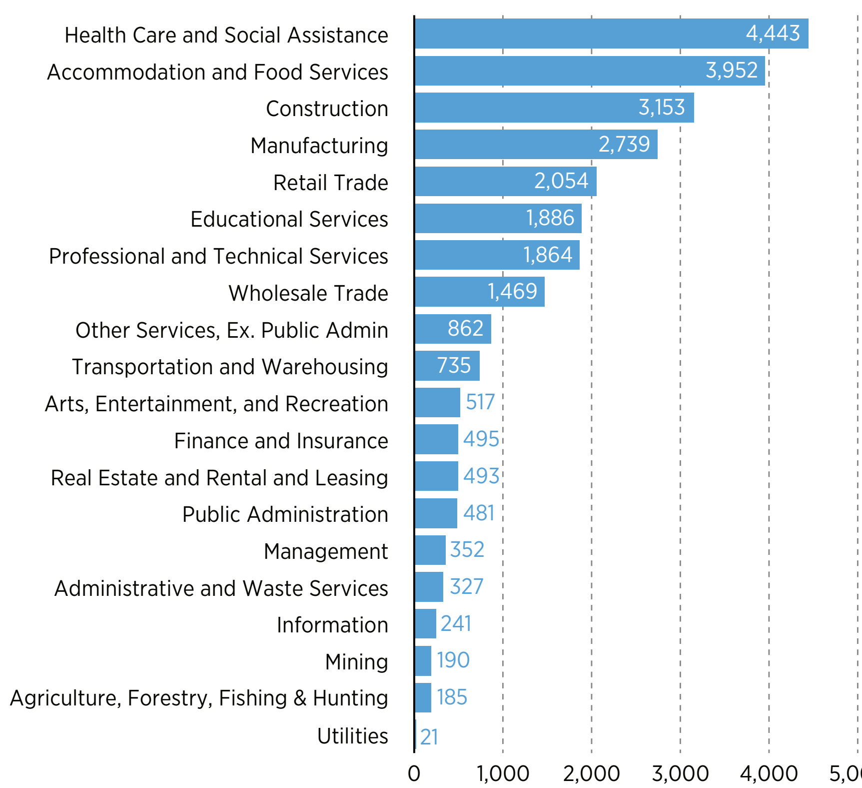
The number of jobs in Fort Collins is growing, but underemployment is a concern.

Fort Collins, which accounts for over half of all jobs in Larimer County, has a growing number of employment opportunities available to residents and other workers in the region. Employment in the city grew by approximately 10,000 jobs between 2010 and 2015. Total employment in 2015 was approximately 85,000. An estimated 52% of the workforce in Fort Collins had a bachelor's degree or higher in 2015. However, only 20% of jobs in the city require a college degree. As a result, many workers might be working in jobs for which they are over-qualified or over-skilled.

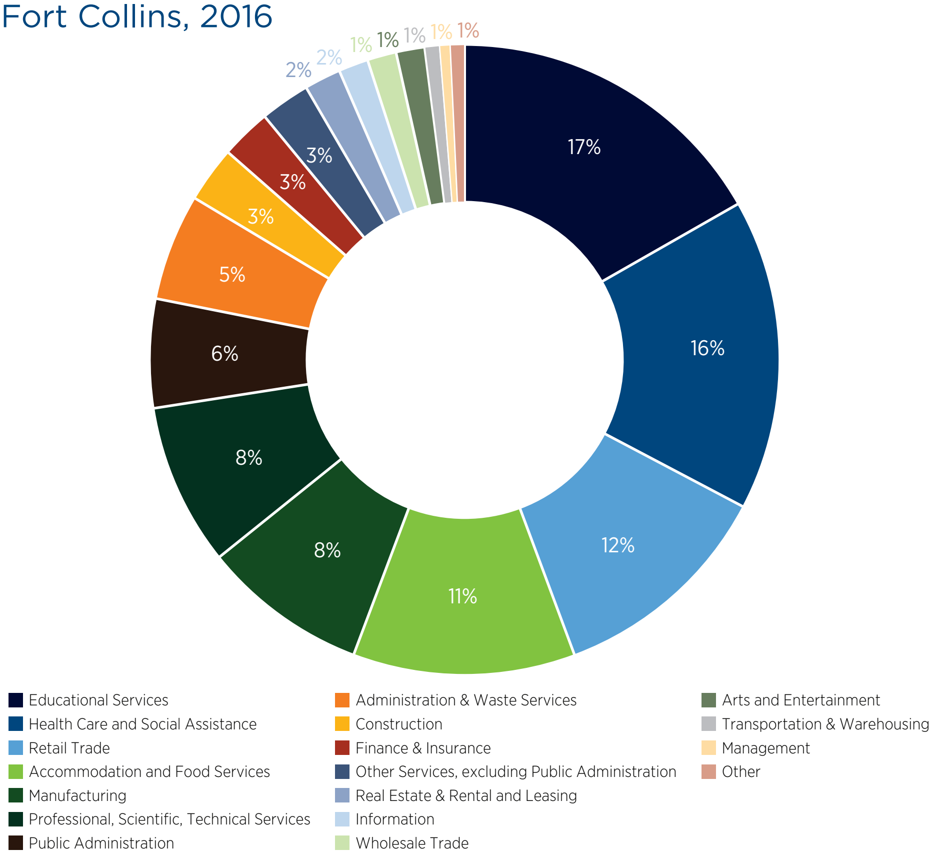
Employment growth is driven by existing business retention and expansion.

Historically, education and health care have been two of the largest industries in Larimer County, accounting for over 38,000 jobs in 2016 (about 25% of all jobs) and for 6,300 of net new jobs over the last six years. These sectors are even more concentrated in Fort Collins, with a total of nearly 28,000 jobs (or one-third of total employment). Existing business retention and expansion is the City's first economic development priority and continues to account for the majority of new jobs in Fort Collins.

Change in Employment by Industry[40]
Larimer County, 2010-2016



Distribution of Jobs by Industry[41]
Fort Collins, 2016



Clean energy is a growing industry.

Clean energy is a growing sector in Colorado's economy. The components of clean energy include renewable energy, energy efficiency, advanced grid technology, advanced transportation, and clean fuels. Larimer County has an estimated 2,600 jobs related to clean energy. The industry is bolstered in Fort Collins through research and development activities generated at CSU.

Climate economy.

The City of Fort Collins, through its Economic Health Department, has taken a proactive approach in preparing the local economy to adapt to changes brought on by climate change. Programs help local businesses to understand potential impacts of climate change on their ability to operate, while also providing resources to help address those impacts.

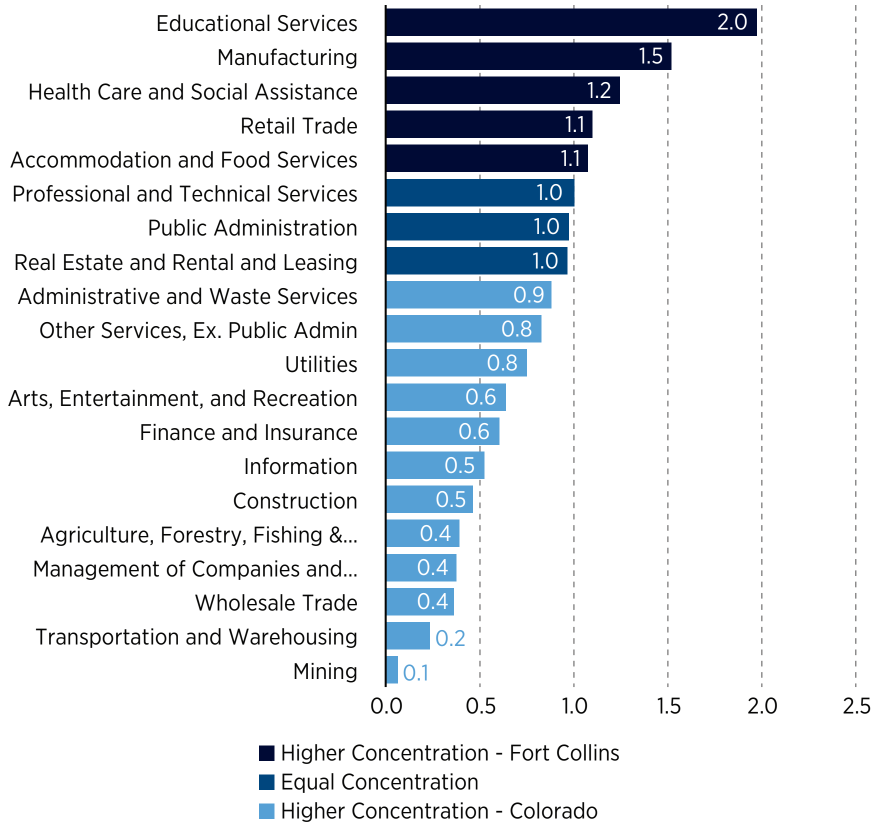
Climate innovations.

The City, through the utilities it provides and partnerships it has formed, sees an opportunity to become a leader in the development of innovations to address climate change. Several partnerships have formed in the past (Colorado Clean Energy Cluster, Colorado Water Innovation Cluster, and others) to bring together public, non-profit, and private entities to identify solutions to future challenges the city and economy may face. In addition, the City is focused on creating opportunities for new businesses and business models to be formed to create economic value from carbon reduction and climate adaptation activities.

Top Ten Largest Employers[42]
Fort Collins, 2016

EMPLOYER	INDUSTRY	EMPLOYEES
Colorado State University	Educational Services	7,525
Poudre School District	Educational Services	4,300
University of Colorado Hospital	Health Care and Social Assistance	3,800
City of Fort Collins	Public Administration	2,400
Larimer County	Public Administration	1,840
Woodward, Inc.	Wholesale Trade	1,230
Broadcom Limited	Manufacturing	1,080
Department of Agriculture	Public Administration	1,080
Otter Products, LLC	Retail Trade	860
Employment Solutions Personnel	Administration and Waster Management	850

Location Quotient[43]
Fort Collins, 2016



Broadband and telecommunications.

After receiving voter approval in 2017, the City is moving forward with becoming a municipal internet service provider (ISP) and implementing a high speed next generation fiber network to serve the entire community. Broadband services will be provided through either the City's electric utility or a new telecommunications utility. This will position the City to provide high speed internet services at a competitive price, allowing it to continue to attract technology-driven employers and a knowledge-based workforce.

Industry specializations.

The largest industries in Fort Collins are also the industries with the highest concentration of employment compared to the State of Colorado. Education and Manufacturing have location quotients of 2.0 and 1.5 respectively, which means they have higher concentrations of employment in Fort Collins than in the State of Colorado. Fort Collins has much lower concentrations of Wholesale Trade and Transportation and Warehousing, as these industries have location quotients of 0.4 and 0.2, despite the growing number of jobs in these industries in Larimer County.

Employment growth is outpacing growth in our workforce.

Over the past years, employment growth has outnumbered growth in the workforce in both city and region. This trend has created a tight labor market, putting more pressure on companies to be proactive with recruiting new employees.

TALENT 2.0

Talent 2.0 is the name of a recently released study examining the strengths and weaknesses of Larimer County's workforce. The report was a joint effort between the City of Fort Collins, the City of Loveland, Larimer County, the Fort Collins Chamber of Commerce, and other economic development entities in the region. Major findings from the report indicate:

1. Over the last five years, the Fort Collins-Loveland economy added almost 20,000 jobs, but only 11,000 workers. This imbalance, combined with low unemployment and high underemployment, has resulted in many employers having difficulty finding the talent they need.
2. Over the next five years, employers will have at least 28,000 openings to fill. The labor force adds only 2,000 to 3,000 workers each year. As a result, the labor market will likely tighten.
3. Almost one quarter of all workers in the MSA are 55 or older. With the upcoming wave of retirements, employers will need to start succession planning now in order to prepare for the loss of those key individuals.

The report recommends communities in the region to assist employers connect with potential employees, align education and workforce resources more closely with business needs, and address barriers in the talent pipeline. The findings suggest that City Plan will need to consider policies that will make Fort Collins more attractive and accessible to a growing workforce.

Jobs are growing faster than housing in the city and county.

Between 2010 and 2015, the number of jobs in Fort Collins increased by 15%. During this same period, the number of housing units increased by 8%. As such, the ratio of jobs to housing increased from 1.18 in 2010 to 1.25 in 2015.

Wages are growing on average...

Wages in Larimer County have grown by 5.9% annually over the past six years, approximately twice as fast at the national average.Wages are also growing significantly even when accounting for inflation. The city's six largest industries had a wide variety of average annual wages (at the county-level; wage data is not available at the city-level), with some much higher than average and some well below the county average.

...but wage growth was highest for above-average wage jobs.

Jobs that paid wages 20% above the county average experienced the highest rates of wage growth between 2010 and 2016. 54% of the growth in wages over this period was seen in above-average wage jobs.

Below-average wage jobs accounted for the majority of recent job growth.

From 2010 to 2016, below average wage jobs (those with wages below 20% of the county average) accounted for 42% of new jobs in Larimer County. The majority of this growth occurred in retail and accommodations and food service. Average wage jobs (those with wages within 20% of the county average) accounted for 38% of overall employment growth in the county over the same period, and above average wage jobs (those with wages above 20% of the county average) accounted for 21%. This increase in low-wage jobs, while similar to trends nationally, is contributing to housing affordability issues in the city.

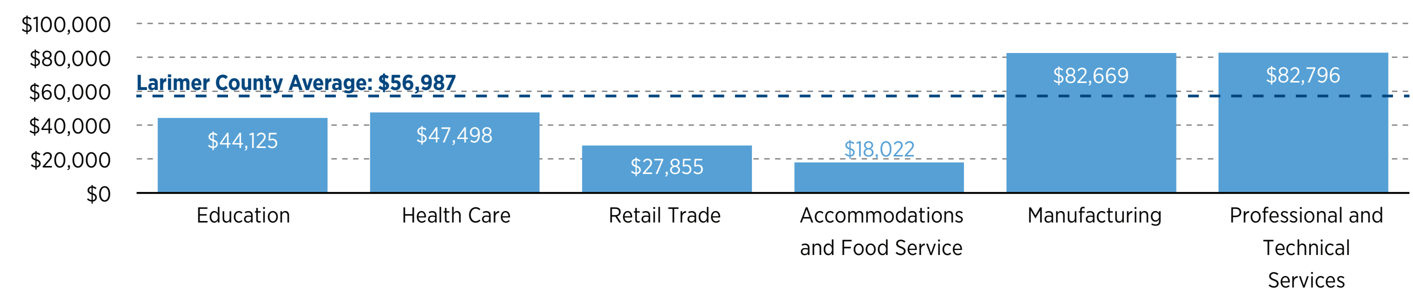
10,000

JOB GROWTH 2010 - 2015[45]

4,800

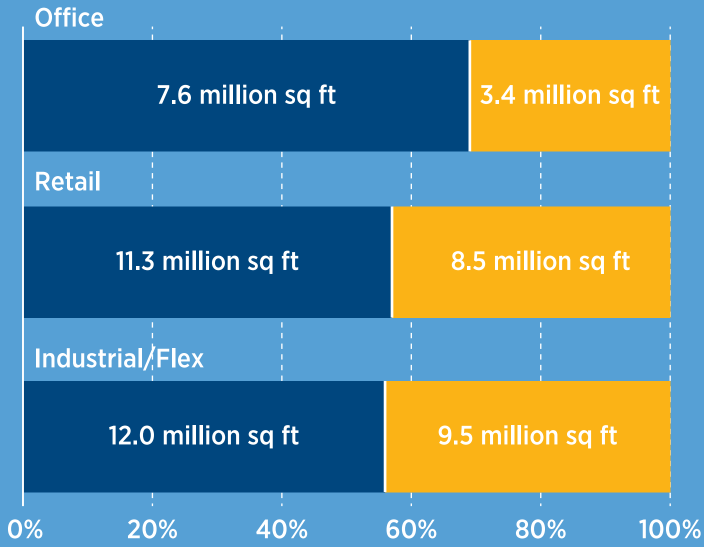
HOUSING GROWTH 2010 - 2015[46]

Average Wages for Selected Industries[44]
Larimer County, 2016



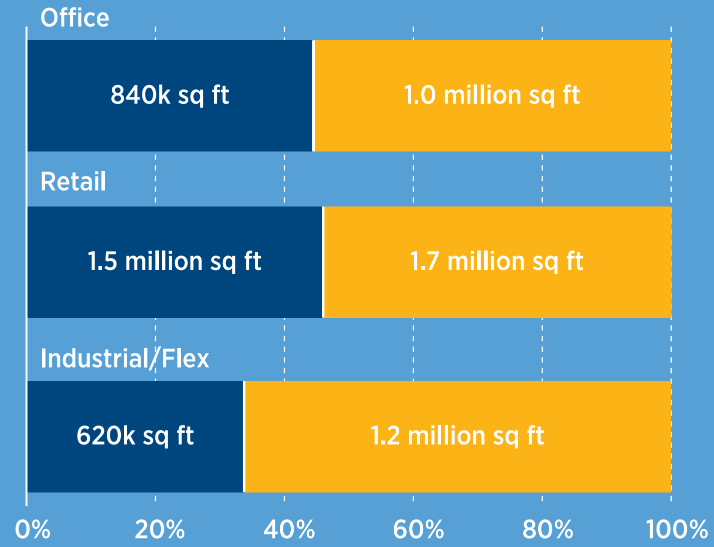
Current Inventory[47]

Fort Collins & Larimer County, 2017



New Development[48]

Fort Collins & Larimer County, 2007 - 2017



■ Fort Collins ■ Larimer County

Average Rents[49]

Fort Collins & Larimer County, 2017

	Fort Collins	Larimer County
Office	$16.05	$22.11
Retail	$19.53	$18.51
Industrial/Flex	$9.44	$9.36

Vacancy Rates[50]

Fort Collins & Larimer County, 2017

	Fort Collins	Larimer County
Office	3.7%	4.7%
Retail	6.0%	3.5%
Industrial/Flex	3.1%	6.8%

■ Fort Collins ■ Larimer County

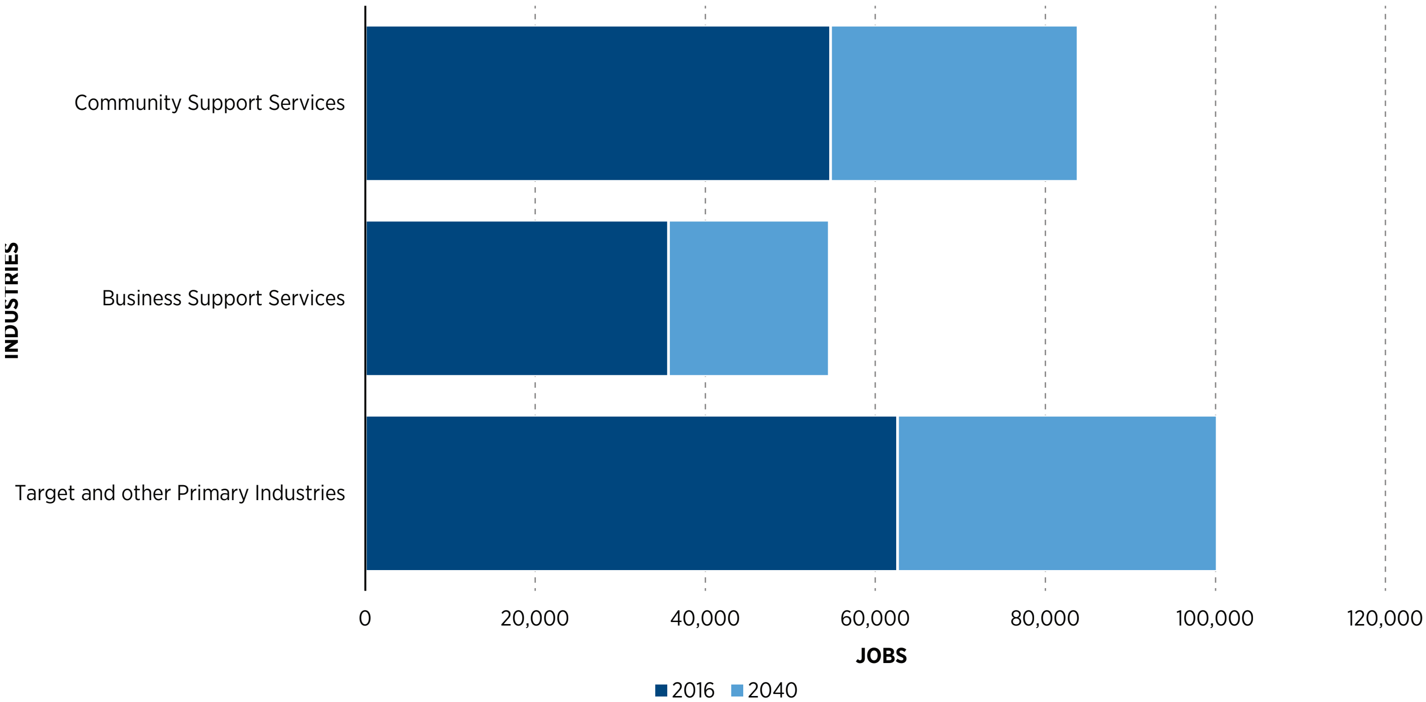
COMMERCIAL & INDUSTRIAL DEVELOPMENT TRENDS

Fort Collins accounts for the majority of commercial and industrial space in Larimer County including nearly 70% of office space. However, over the past 10 years the labor force has become more interconnected within the region and the I-25 corridor has grown in importance. Because Fort Collins has not made the same choice to grow along I-25 as other communities in the region, the city has been capturing a decreasing share of new commercial and industrial development. Neighboring communities have been able to attract and develop competitive job and retail centers, primarily along I-25. Fort Collins captured 45% to 46% of office and retail development since 2007, and only 34% of industrial space. The declining capture illustrates this growing competition from neighboring communities for new development.

Job growth over the past five to seven years has been driving demand for new business and employment spaces. Vacancy rates for office, retail and industrial space in the Fort Collins and Larimer County are low, indicating demand for new development. This is especially true for office and industrial space in Fort Collins, which saw vacancy rates near 3% in 2017. However, average rental rates for office and industrial space are equal to or less than the county as a whole, which may indicate that the City's inventory of spaces are not as attractive as elsewhere in the county.

Where We're Headed

Job Growth Forecast[51]
Larimer County, 2016-2040



Job growth will continue.

It is estimated that employment in Larimer County will grow at an annual rate of 1.9%, adding over 85,000 jobs between 2015 and 2040.

Employment growth will continue to exceed workforce growth.

According to the recently completed Talent 2.0 study, the region's labor force is expected to grow more slowly than rate of growth for job openings. In the near-term, this will place more pressure on the labor market.

Rate of job growth will continue to exceed housing growth.

As in previous years, the rate of job growth is expected to exceed the rate of housing growth. By 2040, the ratio of jobs to housing will be around 1.47, larger than the 1.25 jobs to housing ratio seen in 2015. This trend is likely to result in businesses depending even more on in-commuters from surrounding counties to meet their employment needs.

A good portion of our workforce will retire soon.

The Talent 2.0 report estimated that a quarter of the labor force in Larimer County is 55 years or older. Many of these workers will retire over the next 10 years. As this happens, it will be essential that the city is able to accommodate new workers with the right skills and experience to fill these positions.

Target and other primary industries will see largest growth.

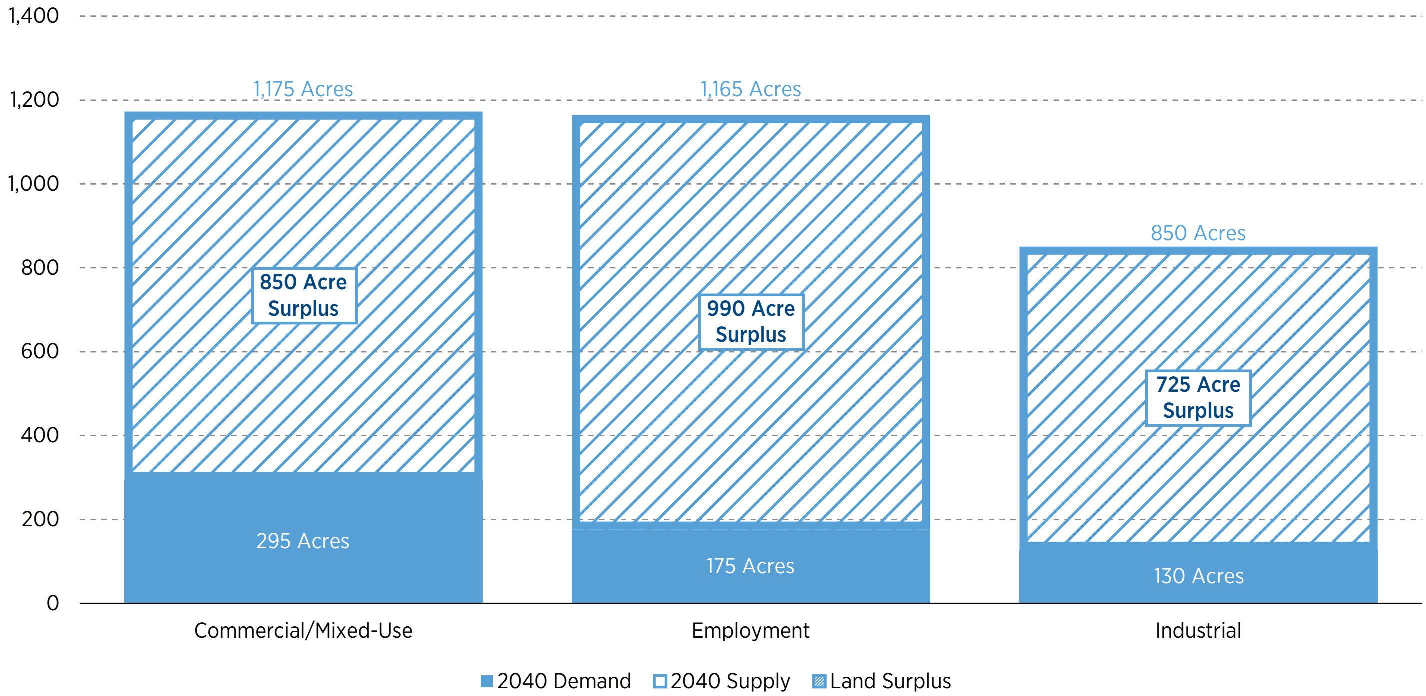
Of the three industry sectors, employment in Larimer County will increase most in target and other primary industries, both in absolute terms (37,621 jobs) and in terms of annual average rates of growth (2% per year). Within this sector, job growth will be greatest for Hospitals and Health Providers.

1.47

**JOBS:HOUSING BALANCE[52]
FORT COLLINS, 2040**

Employment Land Supply and Demand[53]

Fort Collins, 2017-2040



Demand is greatest for commercial/mixed-use land.

Employment growth will result in a future demand for approximately 295 acres of commercial/mixed-use land (including retail and office space), the greatest demand among the three land use types forecasted (industrial, employment, and commercial/mixed-use), accounting for 49% of demand.

Supply of non-residential development exceeds estimated demand.

The available supply of land zoned for commercial/mixed-use, employment, and industrial uses exceeds the available capacity of vacant buildable lands under current zoning designations. The surplus of land for employment uses was greatest of the three, with around 990 acres of vacant land expected to remain by 2040.

Location of vacant land may not be competitive for capturing future employment growth.

The majority of vacant employment land is located at the edge of the city in the northeast portion of the Growth Management Area (GMA). Much of this area will require investments in infrastructure before new development can occur.

Areas that have been capturing new growth have little capacity left.

Downtown and Harmony Road have been capturing much of the non-residential development that has occurred in Fort Collins over the past decade. However, these areas have little capacity (on vacant land) left to accommodate new development.

What Does it Mean for City Plan?

Alignment of land supply with future employment demand.

Sufficient vacant land exists to accommodate anticipated demand for non-residential uses; however, the land may not be development ready or in locations that are competitive for capturing future employment growth. Key considerations for future growth scenarios include possible shifts in the overall mix of industrial versus employment uses and general commercial/retail uses versus mixed-use development, as well as the potential to "reshuffle" some employment land to residential to better align remaining land with demand, access, and infrastructure needs for different uses.

Ability to grow workforce in the city and region.

Shifting preferences nationally are driving employers to make decisions on where to locate based on access to the quality of life amenities the younger workforce demands, such as shopping, services, and dining. As a result, mixed-use and transit-accessible locations are becoming more attractive to employers and the workers they are seeking to attract, and the single use, suburban office parks of the past are being retrofitted to accommodate housing and support services. Opportunities to capitalize on these trends will need to be explored as part of the City Plan process to ensure Fort Collins remains attractive to the workforce needed to support estimated job growth in the city and region.

Alignment of workforce skills and future economic opportunities.

Fort Collins has captured a smaller share of commercial and industrial development over the past decade as economic activity within Larimer County has shifted toward I-25, or along roads connecting to I-25, such as US 34, Harmony Road and East Mulberry Street. This shift to the east has resulted in greater opportunities for neighboring communities. Key policy considerations for City Plan center on whether Fort Collins should try to attract a wide variety of job types in order to maintain economic opportunities for all residents (and where), or focus our efforts on certain types of jobs in certain industries, and whether the community can capture a diversity of jobs given our workforce and their skill sets. As well, what amount of jobs and development (specifically retail) the City needs to capture to ensure economic and fiscal health.

Increasing focus on economic resiliency.

The affordability of doing business and of living in Fort Collins is an attribute that will impact economic resiliency. As land and housing prices grow, affordable options for all businesses and residents will need to be addressed. Climate change will present the need for existing businesses to adapt to address new challenges. However, with these new challenges there are also new opportunities to be on the leading edge of climate adaptability and creating economic opportunities out of the challenges. Updates to the Structure Plan map and accompanying City Plan policies are needed to guide the positioning of remaining land. However, trade-offs associated with these changes must be evaluated in the context of other community priorities—housing affordability, climate action goals, equity and inclusivity—to ensure recent trends are not exacerbated.

FOCUS AREA #4: TRANSPORTATION & MOBILITY OPTIONS

Transportation and mobility in Fort Collins are evolving to meet the community's vision and adapt to changes in technology. The 2011 Transportation Master Plan identified ambitious goals that included improving safety for all modes and reducing single occupancy vehicle (SOV) trips through quality multi-modal infrastructure and service and prorammatic improvements. Implementation of recommended projects in the 2011 plan have resulted in improvements in the transportation network.However, gaps remain or have emerged since 2011.

The updated plan will address needs associated with bicycle and pedestrian facilities, transit coverage and frequency, and safety that will meet the needs of a population of 237,000 by 2040.

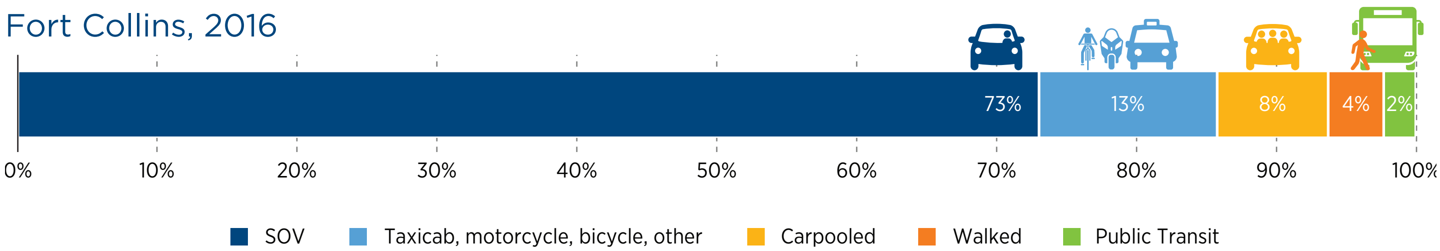
A number of external factors will also impact how transportation metrics in Fort Collins trend into the future. For example, the increase of Transportation-as-a-Service (e.g., Uber and Lyft) suggests a decrease in private vehicle ownership in the future. However, this shift also raises the potential for an increase in induced trips, driving time without passengers, and less reliance on public transit.

The City will need to consider this and other influences on travel behavior—land use, technology, demographic shifts, infrastructure, health, equity, and economic drivers—when recommending policies, programs and capital projects as a part of the Transportation Master Plan.

Where We Are Today

Mode Share of Commuters[55]

Fort Collins, 2016



Mobility

Most commuters drive alone.

The bar chart below shows 73% of commuters drove to work in single-occupancy vehicles (SOVs) in 2016. In contrast, 19% of commute trips are taken by transit, biking, walking, taxi or motorcycle.

SOV use is lower among college students.

College students in Fort Collins were less likely to travel by SOV and more likely to travel by other modes. Results from the 2017 Travel Behavior Survey showed that 38.5% of CSU students drove alone, versus 75% for the general population.

VMT per capita decreased.

Between 2011 and 2016, vehicle miles traveled (VMT) increased by 5% while the population grew by 12%. Because population grew faster than VMT, VMT per capita in 2016 was 7% lower than in 2011.

Increased use of SOVs for commute trips.

SOVs were used for the majority of all trips made in 2017, and accounted for 72% of the total miles traveled that year. SOVs accounted for an even larger share of commute trips, at 82% of all commute miles traveled.

Average travel time on major arterials is unchanged.

Between 2011 and 2016, travel times on esgments of six major corridors changed slightly in both directions, as shown in the chart below. On average, there was no change in travel times across these arterial corridors.

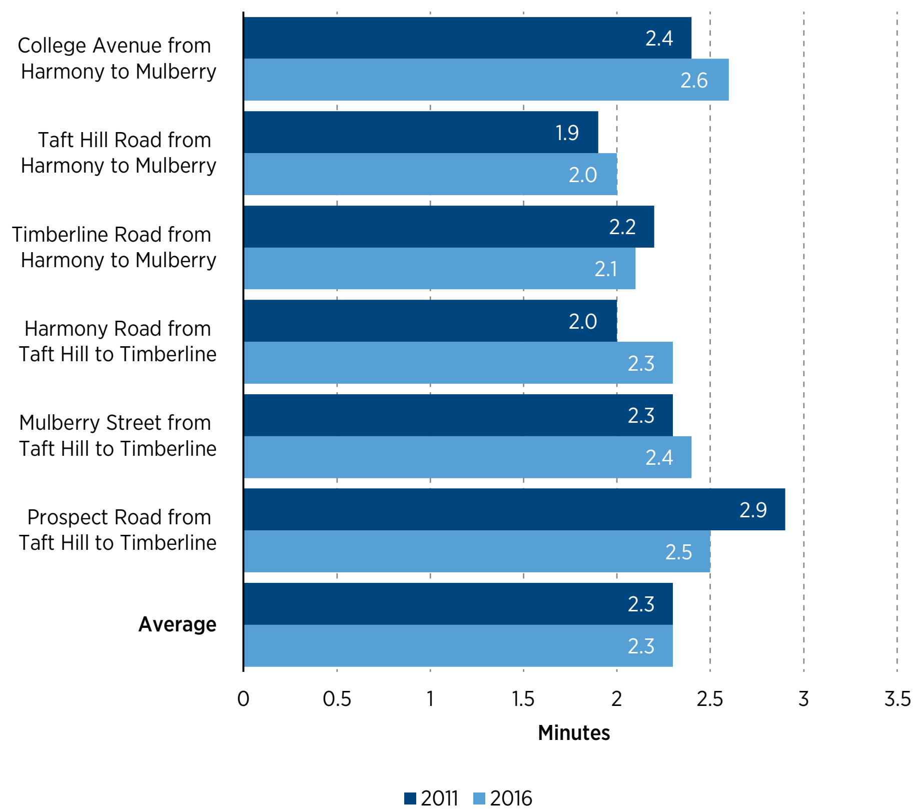
CHANGE IN AVG TRAVEL TIMES[54]
FORT COLLINS, 2011 - 2016

0.0

MINUTES ON ARTERIALS

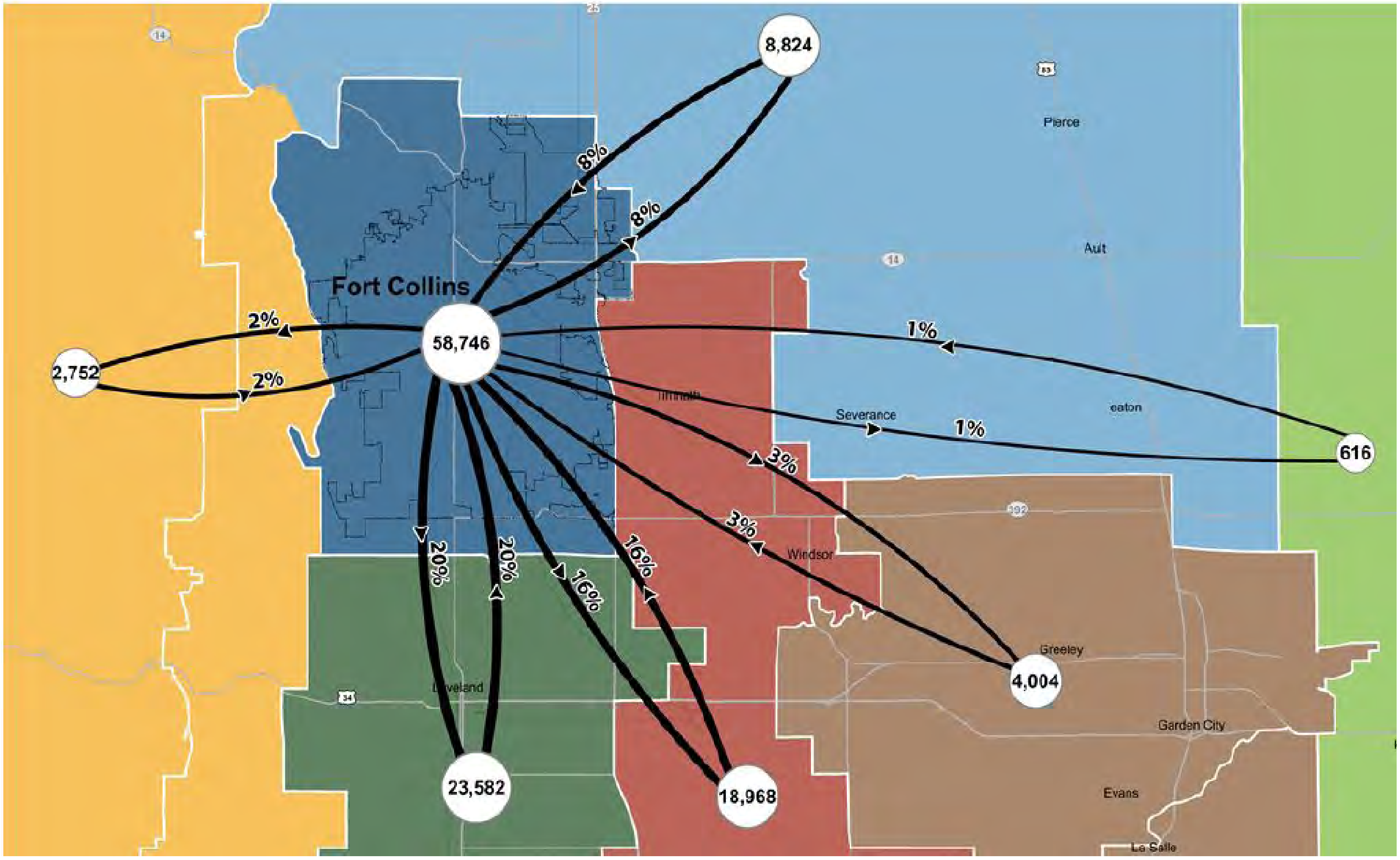
Average Travel Times on Arterials[54]

Fort Collins, 2011-2016



Commuting Patterns[56]

Fort Collins, 2015



The majority of daily regional trips are to the south of Fort Collins.

The map above shows the number of daily trips that start or end in Fort Collins and the percentage breakdown of trips that are going to or from surrounding jurisdictions. For example, 20% of daily trips originate in Fort Collins and end in the areas to the south.

Bicycle and Pedestrian Network

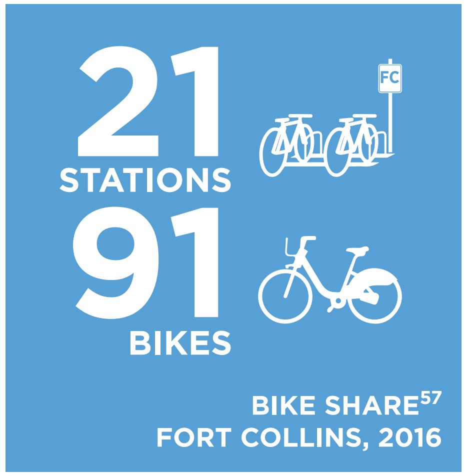
The quality of the City's bike facilities varies.

Fort Collins has over 250 miles of on-street bike facilities categorized as either high comfort or low comfort based on the number of travel lanes, traffic speed, vehicle volumes, and type of bicycle facility present. Almost half, or 121 miles, are low comfort. The city also has 97 miles of paved shared use trails.

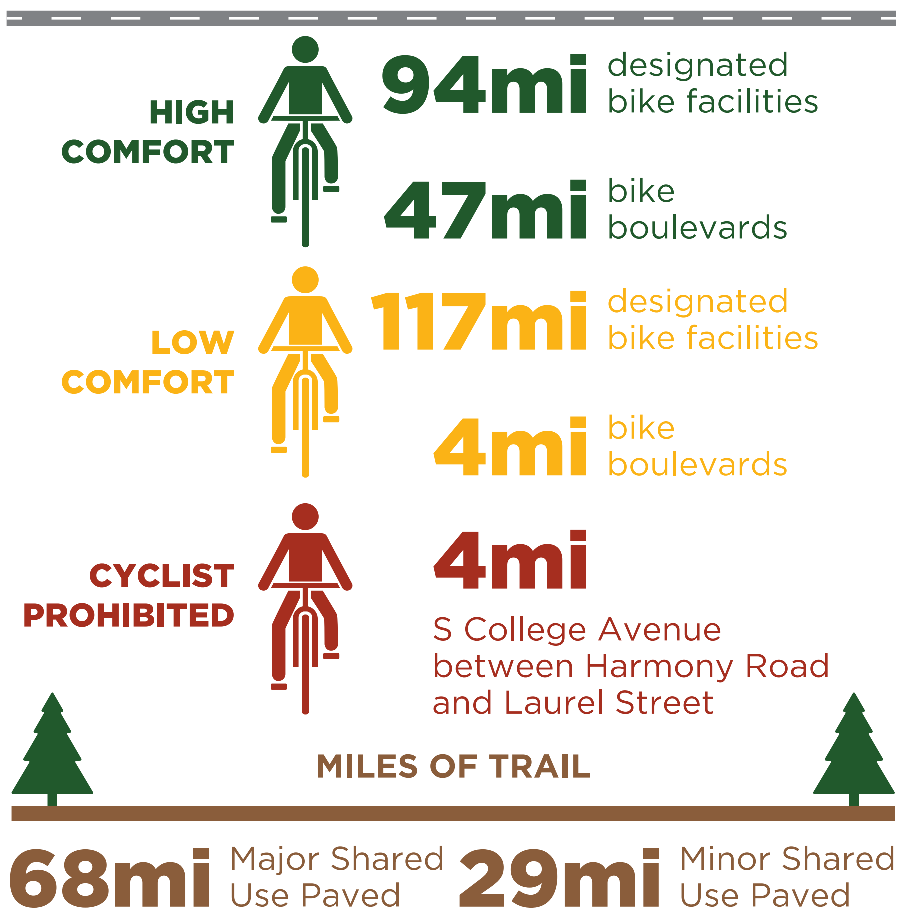
Fort Collins is a nationally recognized city for biking and walking.

The League of American Bicyclists has designated Fort Collins as a platinum Bicycle Friendly Community and CSU as a platinum Bicycle Friendly University and as recognized 62 Bicycle Friendly Businesses. Fort Collins is a recognized bronze Walk Friendly Community and just reapplied to become a silver Walk Friendly Community. Fort Collins has a bike share program with hourly, weekly, annual, and student memberships.

The Fort Collins Safe Routes to School program successfully works to get more children biking and walking to school. In 2016, the program reached 12,000 students and 2,700 adults. It distributed 440 free helmets, taught bike and pedestrian and motorist safety to 800 high schoolers, and served 30 schools.



Bike Facilities[58]
Fort Collins, 2017

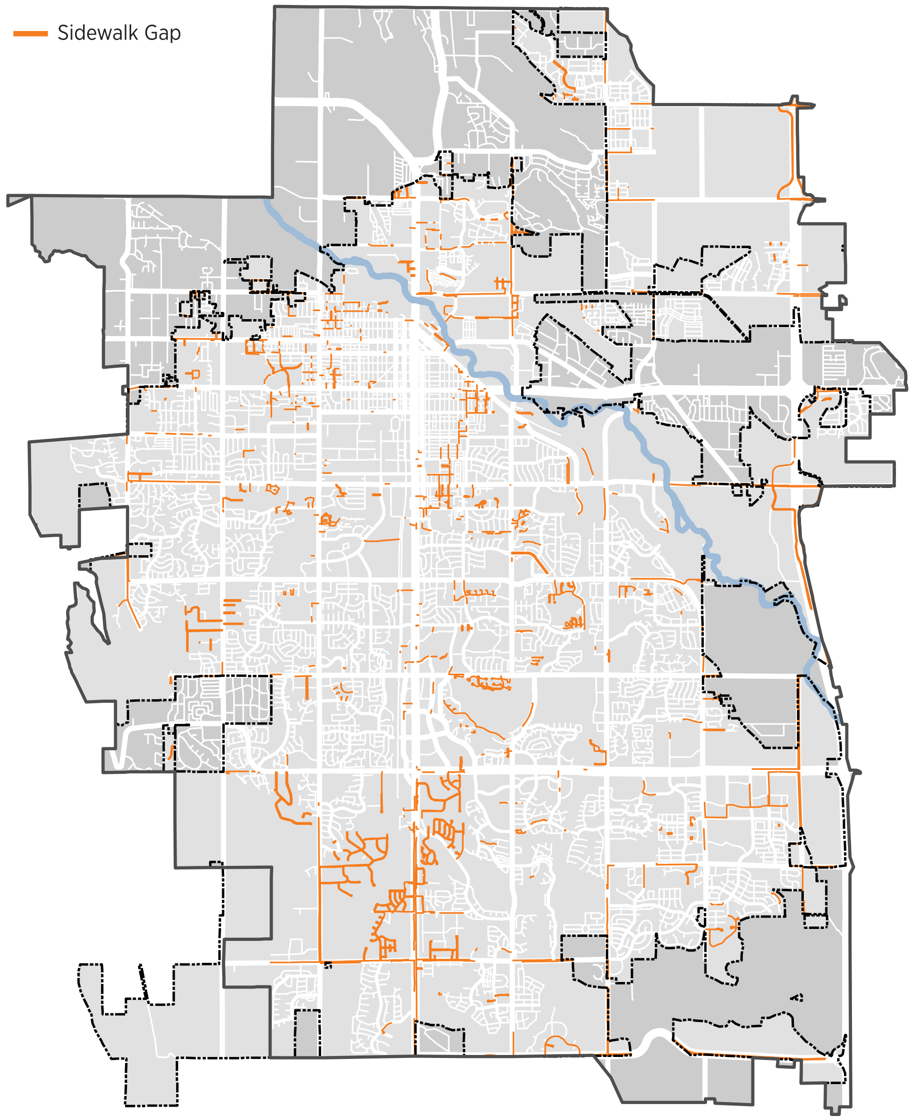


40% of sidewalks are missing or too narrow.

Fort Collins has 877 miles of existing sidewalks. 217 miles of existing sidewalks are not Americans with Disabilities Act (ADA) compliant, for various reasons (they are not wide enough, or in poor condition). Existing sidewalks are identified as either attached or detached. Detached sidewalks are required on all new streets, whereas attached sidewalks are indicative of older standards. An inventory of the city's sidewalk system also identified 221 miles of missing sidewalk, or sidewalks gaps. The map to the right shows the locations of missing sidewalk segments.

Sidewalk Gaps[59]

Fort Collins, 2017



Sidewalk Facilities[60]

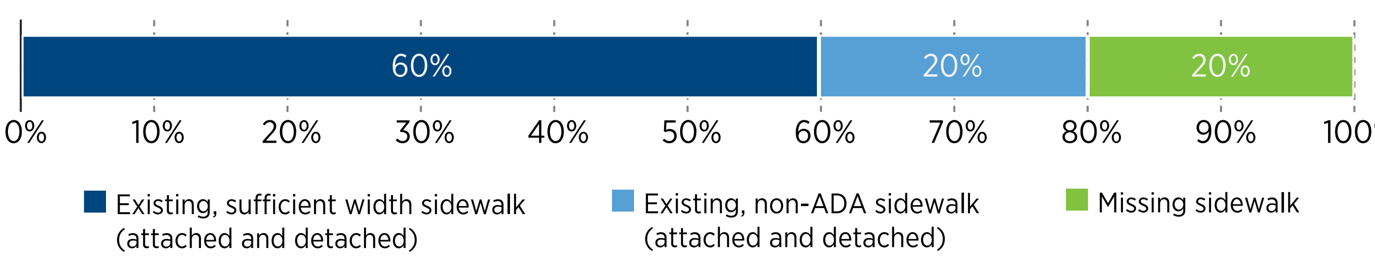
Fort Collins, 2017

515mi
ATTACHED SIDEWALKS (NO BUFFER)

217mi
NOT ADA COMPLIANT

362mi
DETACHED SIDEWALKS (WITH BUFFER)

221mi
MISSING SIDEWALKS



Transit

Transit services have expanded.

Transfort, the City's transit operator, offers 22 fixed routes, including MAX, a bus rapid transit (BRT) route that offers service every 10 minutes along the Mason Corridor. Transfort also operates the HORN (the CSU on-campus shuttle) and the FLEX (regional service to Loveland, Berthoud, Longmont and Boulder six days a week). Additional services are offered for persons with disabilities.

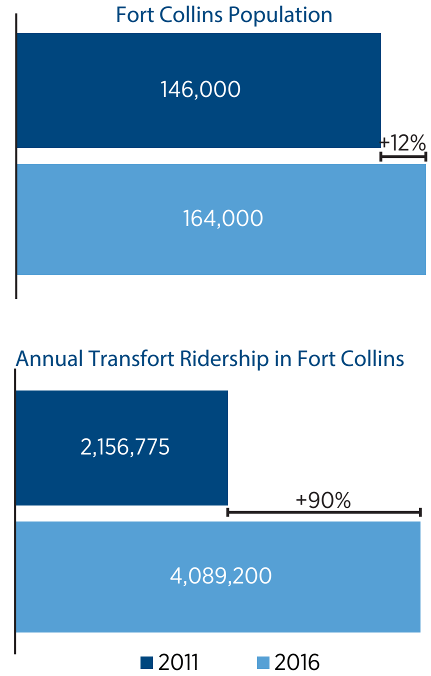
Other public and private transportation services operate in the region.

CDOT runs the Bustang, providing service to Loveland and Denver seven times a day. There has also been a rise of privately owned shuttled operated by apartments and senior living facilities and trips on ride hailing companies (Uber and Lyft).

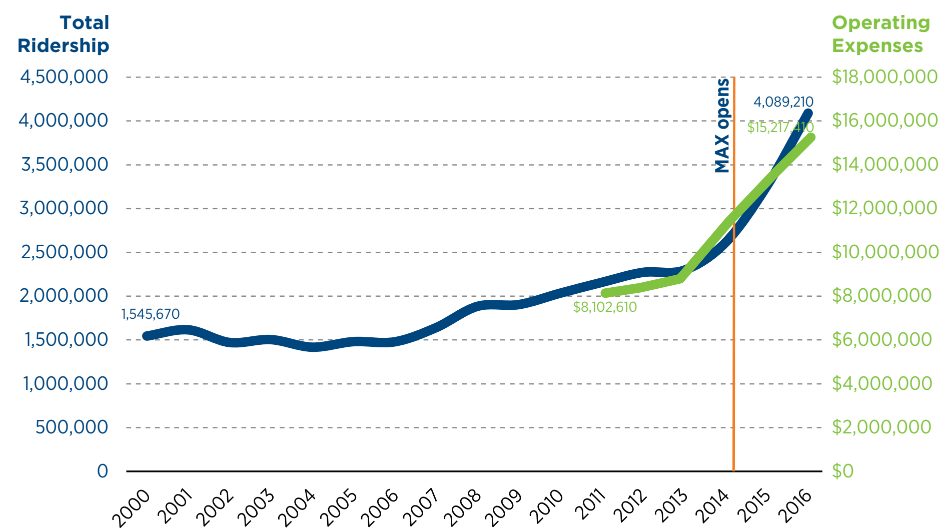
Ridership and operating costs have increased dramatically ince 2011.

From 2011 to 2016, transit ridership in Fort Collins increased by 90%. Over this same period, the population increased by only 12%. This is largely due to the opening of MAX in 2014 and the increase in student ridership over the past several years. During this time, Transfort's ridership by CSU students, faculty, and staff increased by 53% due to more frequent service. Ridership by fare class in the chart below shows that 52% of Transfort riders were CSU students in 2016. To support this additional service, Transfort's costs also increased substantially—by 88% between 2011 and 2016. Transfort relies on a variety of funding sources, including federal funds. While federal funding for transit has been stable for the past 20 years, the future of federal funds is uncertain but expected to continue for the immediate future.

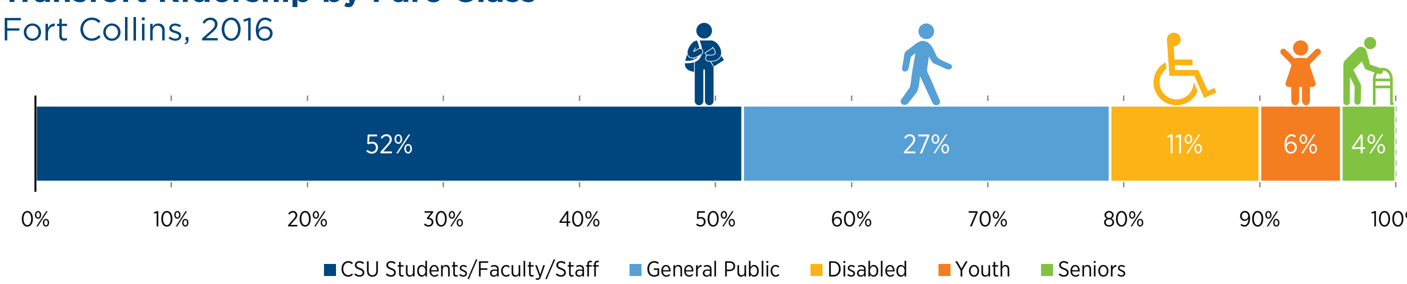
Ridership & Population[62]
Fort Collins, 2011-2016



Transfort Annual Ridership[61]
Fort Collins, 2000-2016



Transfort Ridership by Fare Class[63]
Fort Collins, 2016



Routes that serve CSU have the highest productivity.

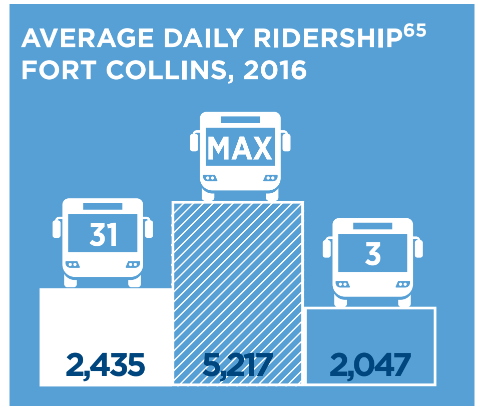
The MAX provides frequent and rapid service connecting several activity centers throughout the city along a central north-south corridor. Routes 31 and route 3 directly connect the CSU campus to Rams Village (student housing west of main campus). The MAX has the highest average daily ridership and routes 31 and 3 have the second and third highest, consecutively.

Productivity is a measure of the ridership per service hour. Because MAX has longer service hours, routes 31 and 3 are more productive than MAX. Overall productivity of Transfort rose in 2014 with a 25% increase in the total number of operating hours due to the opening of MAX and increase in frequencies and hours for several other routes.

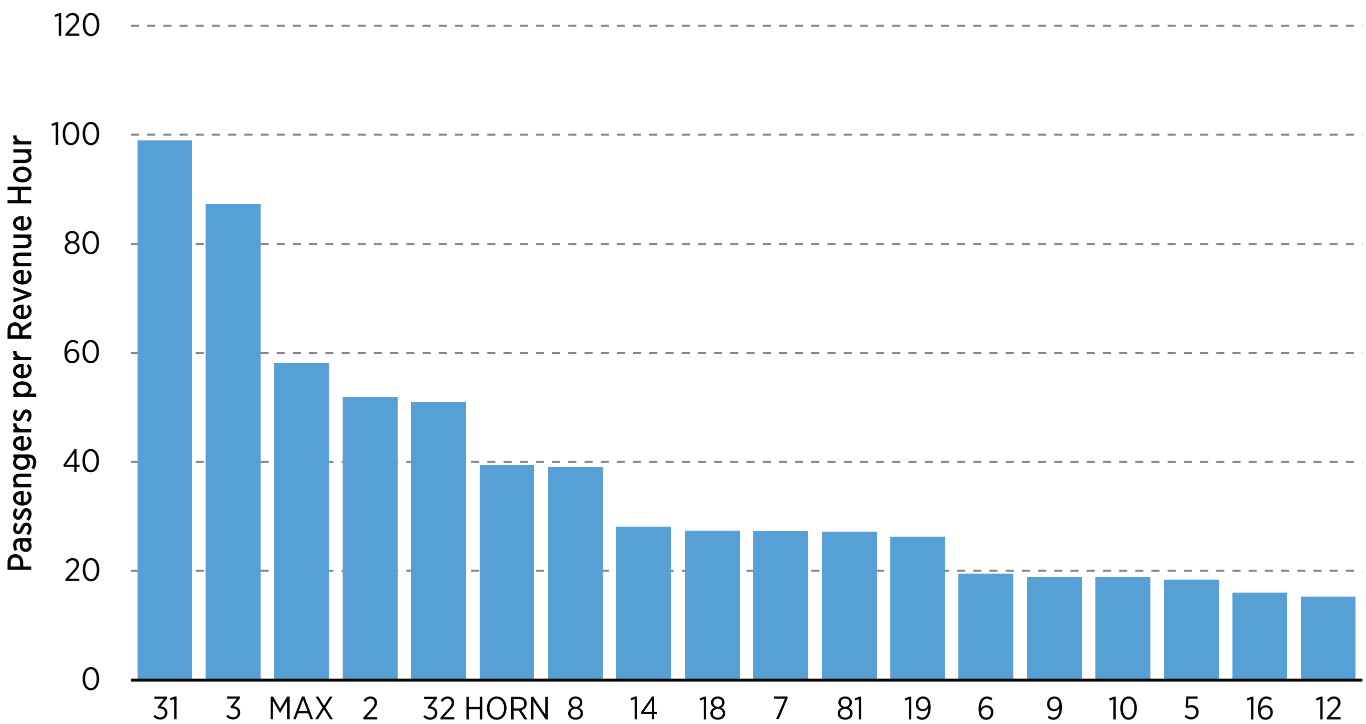
Transit reliability is affected by roadway congestion.

There are some roads and intersections in the community where evening traffic is particularly congested. These areas include Harmony Road from Shields Street to Ziegler Road, Horsetooth Road from McClelland Dive to Timberline Road, Shields Street from Horsetooth Road to Prospect Road, and the intersection surrounding Lemay Avenue and Prospect Road. Congestion on these roadways during the evening rush hour creates challenges for reliable transit service.

Public transit reliability is also poor for areas along Harmony Road, College Avenue north of downtown, Lincoln Avenue between 9th Street and Timberline Road, and Mulberry Street between Timberline Road and I-25.



Transfort Productivity[64] by Route
Fort Collins, 2016



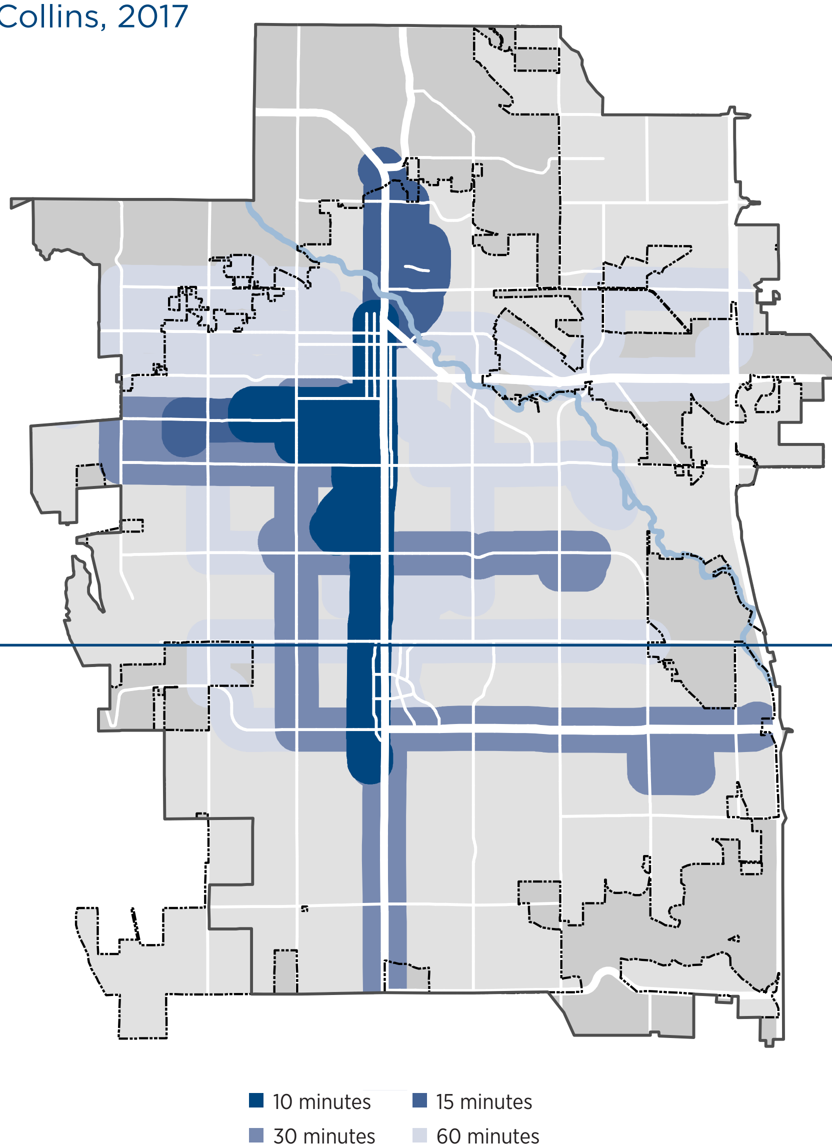
Public transit frequency is uneven across the service area.

Frequency during peak periods ranges between 10 and 60 minutes. Three routes through the spine of the city have 10-minute frequencies during the peak period and one route has a 15-minute frequency, while routes further into the periphery have 60 minute peak frequency. Frequency is displayed on the map to the right.

Based on revenue hours, which measure the amount of service, the current transit network is evenly balanced between coverage routes (low frequencies) and productivity routes (high frequencies), with a concentration of higher frequencies on West Elizabeth, North College, and Mason (MAX).

Transfort Frequency for Areas with Transit Service[66]

Fort Collins, 2017

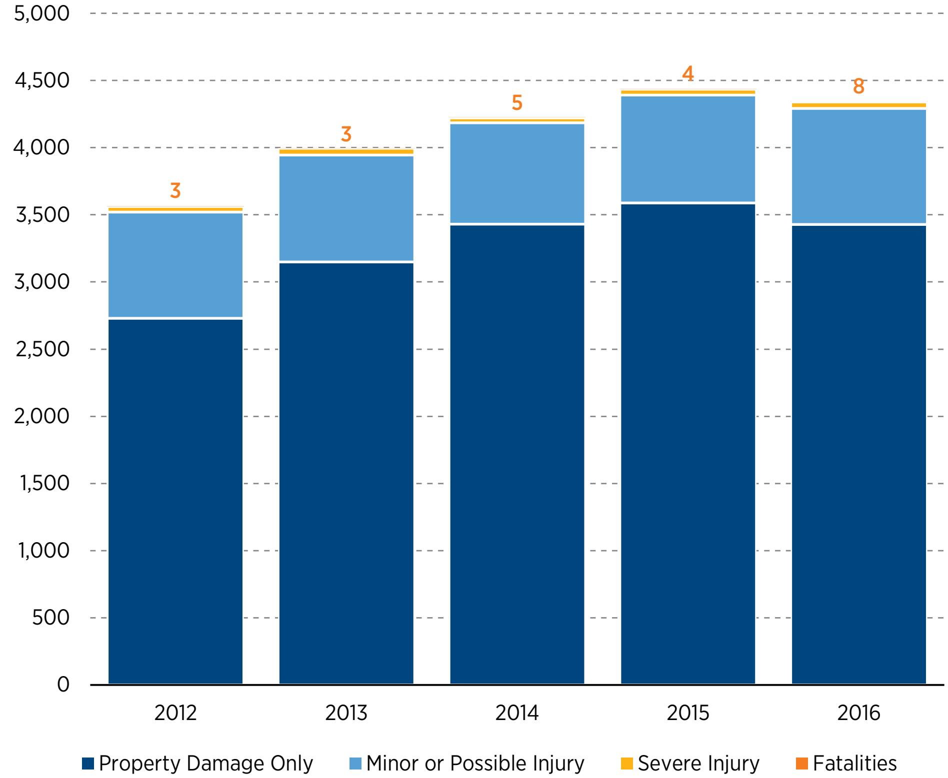


Safety

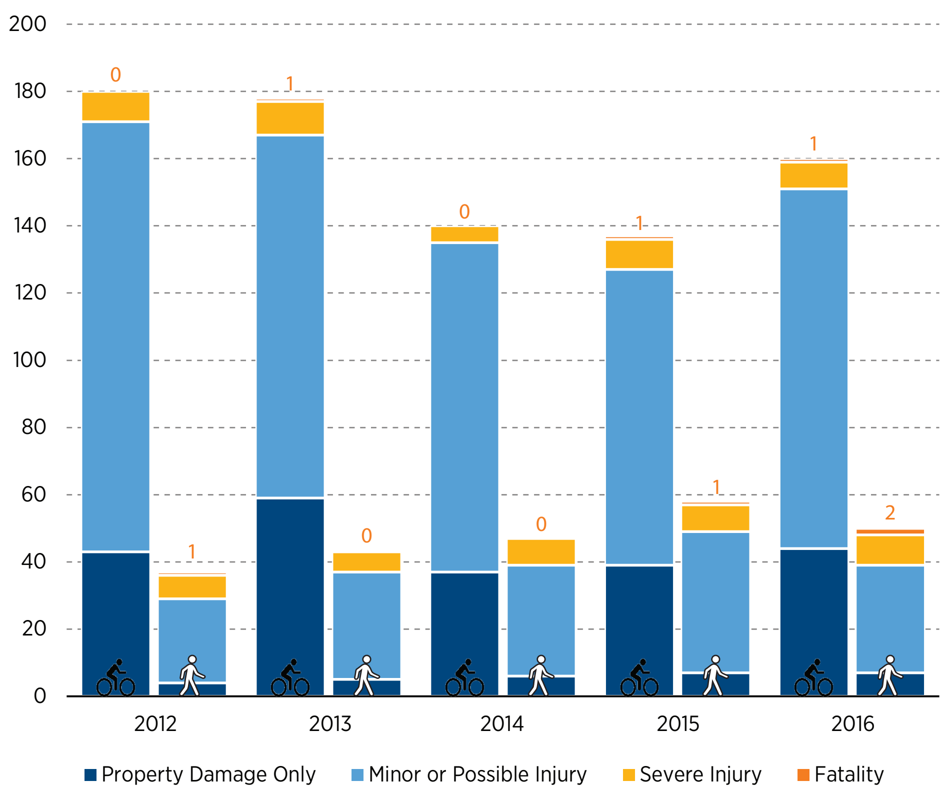
Crashes decreased in 2016, but fatal crashes increased.

In 2016, Fort Collins joined the Colorado Department of Transportation's (CDOT) "Moving Towards Zero Deaths" initiative. The city's fatal collision rate is among the lowest in Colorado and peer cities nationally; however, there were 4,348 traffic crashes in Fort Collins in 2016. Eighty percent of these crashes resulted in no injury (property damage only), but there were eight fatalities. Rear end collisions made up 44% of all crashes and almost half of the recorded crashes in 2016 occurred at signalized intersections. The total number of crashes increased from 2012 to 2015 but decreased in 2016. However, fatal injuries increased from 4 to 8 between 2015 and 2016.

Summary of All Crashes[67]
Fort Collins, 2012-2016



Bicycle & Pedestrian Crashes[68]
Fort Collins, 2012-2016



Bicycle and pedestrian crashes disproportionately result in severe injury.

Pedestrian and bicycle crashes account for 4.8% of all crashes, but account for 32% of crashes that result in severe injury. 87% of crashes involving pedestrians result in some level of injury or fatality. Despite trending downwards between 2012 and 2015, the number of bicycle crashes increased in 2016 compared to the previous year.

Intersections are the most dangerous location for bicyclists and pedestrians.

Almost 90% of crashes involving bicyclists occurred at intersections and about half of all pedestrian crashes were due to motorists failing to yield at a signalized intersection, un-signalized intersection, or driveway.

Where We're Headed

Mobility

Future trends in single occupancy vehicle trips is uncertain.

The use of single occupancy vehicles (SOVs) in Fort Collins will be impacted by multiple local and regional trends. Key demographic trends include an increasing percentage of retirees and growing CSU enrollment, which translates to a decrease in car ownership and vehicle miles traveled (VMT). There is an increasing reliance on shared economy options for transportation, including car sharing, bike sharing, ride sharing, and carpooling. A shift to mobility solutions consumed as a service, as well as data and platforms that pair riders with similar destinations, results in a decrease in SOV use. However, other trends may lead to an increase in SOV use. An increase in same-day home delivery may lead to more frequent deliveries of singular items. Autonomous vehicles may encourage more travel, longer trips, and zero occupancy vehicles due to the reduction of travel time costs.

Travel time on major corridors will reflect changes in multi-modal priorities.

As a layered network that prioritizes different modes along different corridors is implemented, travel times will shift. Some major corridors —where biking, walking or transit are prioritized—may see an increase in travel time for vehicles due to changes in the number of general travel lanes, signal timing, and traffic calming devices. In turn, corridors where the automobile is prioritized may see a decrease in travel time.

TrendLab + Workshop Results[70]

Fort Collins, 2018

INPUT	FUTURE TREND	IMPACT ON VMT
Proportion of retirees	Increase	Decrease
Proportion of college-age residents	Decrease	Increase
Private vehicle ownership	Decrease	Decrease
Enhanced Travel Corridors (ETC)	Moderate Increase	Moderate Decrease
Transportation Demand Management strategies	Moderate Increase	Moderate Decrease
Expansion of MAX and first/last mile improvements	Moderate Increase	Moderate Decrease
Housing affordability	Decrease	Increase
Number of goods delivered	Aggressive Increase	Aggressive Increase
Growth of CSU	Moderate Increase	Moderate Decrease
Social networking	Increase	Decrease
Ride hailing	Increase	Increase
Autonomous vehicles	Shared Fleets	Decrease

In a workshop with city staff in January 2018, attendees voted on how they anticipate land use, demographics and technology trends to shift by 2040. The table shows how the majority of attendees voted and how each trend is likely to impact VMT.

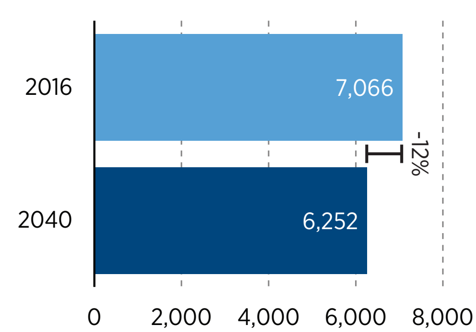
Regional commuting patterns will shift due to emerging land use and regional transit trends.

Commuting patterns into and out of Fort Collins will be shaped by a number of factors—the implementation of land use and transportation projects, emerging mobility trends, and emerging technologies. Land use changes that will influence travel patterns include the availability of affordable housing that is accessible to transit and the quantity of dense and mixed land uses that will shorten trip lengths. Recent and planned improvements of regional transit connections providing frequent service to Denver, Boulder, Berthoud, and Longmont will also increase mode choices for regional trips. Emerging trends that will influence commutes include autonomous vehicles, the sharing economy, and Transportation-as-a-Service.

The North Front Range Metropolitan Planning Organization, in consultation with member communities, maintains a model analyzing commute trips between identified zones in 2015 and forecasted those trips to 2040. The model projects a 140% increase in trips between Fort Collins and the central I-25 subregion, a 68% increase between Fort Collins and Loveland, and an average increase of 88% between Fort Collins and all other subregions.

VMT Per Capita[69]

Fort Collins, 2016-2040

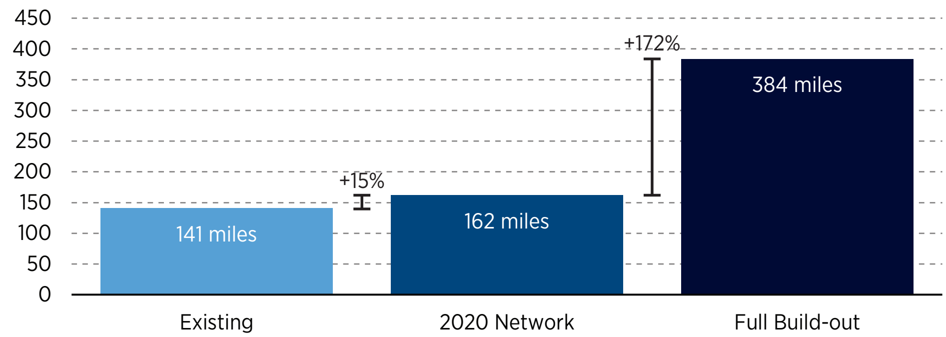


Overall traffic volumes will decrease even as the population grows.

Projections from the Climate Action Plan anticipate that despite a growing population, Fort Collins will see a decrease in VMT etween now and 2040. These projections assume the implementation of a number of strategies to reduce greenhouse gas emissions including a reduction in VMT. Despite unpredictable shifts in travel behavior, VMT per capita is projected to decrease 12% by 2040.

Future Bicycle Facilities[72]

Fort Collins



Safety

The City is committed to zero traffic-related fatalities.

The City is working hard to reduce traffic-related fatalities to zero, recently joining the Colorado Department of Transportation's "Moving Towards Zero Deaths" initiative. However, successful improvements to roadway safety require collaboration of multiple agencies and a broad spectrum of efforts that include not only the design of roadways, but also education of all users, encouragement of safe behaviors, enforcement of traffic laws, and continuous evaluation to ensure efforts are achieving desired results. In addition to the effort made by the City, other changes in technology and transportation are also increasing safety. These include Collision Avoidance Systems in vehicles, autonomous vehicles and the use of big data to identify high crash locations and trends.

0

TRAFFIC FATALITIES[71]
(ALL MODES)
2020 GOAL

Bicycle and Pedestrian

Bicycle and pedestrian infrastructure will continue to expand.

The 2014 Bicycle Plan aims towards a goal of encourage 20% of Fort Collins' residents commuting by bicycle by 2020. This includes a pilot program for protected bike lanes and the goal of 80% of residents living within ¼ mile of a high comfort bicycle facility.

The 2011 Pedestrian Plan recommends a prioritized list of 81 projects including sidewalk gap closures, crossing treatments and grade separated pedestrian crossings. The plan also identified level of service standards and an updated map of pedestrian priority areas throughout the city where a higher level of service is required.

Transit

Uncertainty exists around whether ridership increases can be sustained.

Transit ridership in Fort Collins has been growing in recent yeras, in contrast to national trends. Nationwide, transit ridership has been decreasing due to a variety of factors. Many of Transfort's peer agencies in similarly-sized communites have also recently experienced declines in ridership. Transfort's ridership growth during this period can be credited towards increased investment in transit, primarily MAX and routes serving CSU, and CSU's parking policies which encourage more students to use transit.

Whether Transfort has absorbed latent transit demand and continues to grow ridership remains to be seen. Increasing CSU enrollment will continue to be a factor, as well as general community growth and new transit oriented development. Growth in ridership may be tempered with an aging population, increases in vehicle ownership, and new mobility options that compete with public transportation.

Investments in Transit

Fort Collins has invested heavily in transit over the past four years, relying on general fund increases. Together with increaesd CSU funding, revenue hours have increased 64% since 2013. The service investments have outpaced growth in service investments by Transfort's peer agencies in other communities. Transfort's reliance on funding from the general fund is not sustainable. Further investments will be driven by changes in mobility choices, future fixed-route service demands, and changes in transportation funding at the local, sate, and federal levels.

Expansion of transit markets.

The opportunity to expand Transfort's market reach will increase with a broader distribution of infill and redevelopment projects beyond Downtown and the West Elizabeth corridor. Land use density and transit investments should go hand-in-hand to ensure that the appropriate level of transit is provided to the commuity.

Changing mobility choices.

In the coming decade, a wider array of mobility choices will affect ridership on public transportation. The increase in Transportation Network Company use (Uber/Lyft) is having an impact, particularly for trips made in the evenings and weekends. Upcoming technologies may also influence travel behaviors away from public transportation. The city can continue to play an important role in influencing travel behavior by supporting a variety of shared mobility options and innovations in transportation, while continuing to provide public transportation or those who cannot afford other means of transportation.

What Does it Mean for City Plan?

Anticipating and adapting to emerging mobility and delivery trends.

A number of external factors taking place locally, regionally, and nationally will impact how transportation metrics in Fort Collins trend into the future: the degree to which consumers rely on ride-hailing services, shifts in private vehicle ownership, the way in which next-generation autonomous vehicles are owned and operated, and the degree to which internet shopping, low-cost delivery options, and same-day home delivery affect travel. It is impossible to predict where these trends will take us during the twenty-year planning horizon. However, it is important to explore the potential impacts and opportunities associated with different scenarios on our transportation system and land use patterns as part of the City Plan process. A key consideration will be the degree to which the community is willing to support the adoption of policies, incentives, and regulations to mitigate potentially negative impacts—such as an increase in VMT or SOV, or both—in the future.

Alignment of land use and transportation policies.

Land use patterns and policies have a direct impact on travel behavior such as employee commuting patterns and the number of single occupant vehicles (SOV) in use, which in turn have a direct impact on VMT, travel time, and overall traffic volumes. Although the City's existing land use and transportation policies are closely aligned, the City Plan provides an opportunity to ensure these policies are being implemented to their fullest potential. Key considerations include refining the role and extent of the Enhanced Travel Corridors, supporting the implementation of intended land use densities where significant travel investments have been made (or will be made in the future), addressing the housing affordability issues that are increasing in-commuting, and to building greater public awareness and understanding of the types of land use patterns that can be served most efficiently with different types and levels of transit service.

Evaluation of potential trade-offs.

Fort Collins' population growth outpaced VMT growth between 2011 and 2016. This trend reflects an increase in transit ridership after MAX opened and the City's ongoing commitment to climate action. To ensure this trend continues, the relationship between future growth scenarios, transportation policies (e.g., transit productivity vs. coverage, level of Service, safety), climate action goals, and other community priorities (housing affordability, air quality, equity) will need to be carefully considered as part of the process to update City Plan.

FOCUS AREA #5: CLIMATE ACTION

Photo: City of Fort Collins

Climate action includes both mitigation (reducing emissions) and adaptation and resiliency (how we prepare for, adapt to, and increase our resiliency to climate impacts). Climate action also aligns City goals and policies around energy (Energy Policy), waste (Road to Zero Waste), transportation, air quality (Air Quality Plan), and water (Water Supply and Demand Management Plan and Water Efficiency Plan).

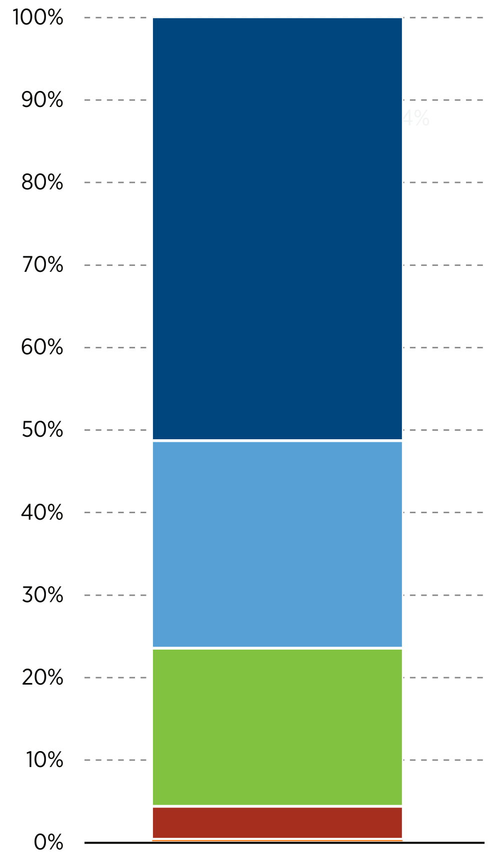
Fort Collins was an early adopter of efforts to reduce community-wide greenhouse gas emissions (GHG) at the local level. The City adopted initial goals to reduce GHG emissions in 1999, followed by a more comprehensive Climate Action Plan in 2008. In 2015, the City adopted more aspirational goals and a concrete strategy as part of the Climate Action Plan (CAP) Framework, making a commitment to reduce GHG emissions by 80 percent below 2005 levels by 2030, and to achieve carbon neutrality by 2050.

Since 2015, the City has engaged staff and leadership throughout the city organization in efforts to implement key initiatives, leading the way for other local governments across the country. These efforts have centered on achieving the City's near-term goal of reducing GHG emissions by 20 percent below 2005 by 2020. As a result of these efforts, Fort Collins is leading the way in demonstrating how population and economic growth can decouple from emissions. Since 2005, our population has grown nearly 20% and our economy 30% while overall emissions are down.

The City currently lacks a formal adaptation and resiliency plan, though other policy documents, as noted above, guide longer-term efforts. Acknowledging these issues and integrating formal policy direction as part of City Plan will help reinforce the City's ongoing efforts.

Where We Are Today

Source of Greenhouse Gas Emissions[73]
Fort Collins, 2016



Electricity 51%

Emissions from electricity use are caused by fossil fuel combustion. Most of our electricity is generated by coal and hydropower, with a small amount from natural gas, and increasing amounts of renewable wind and solar resources.

Ground Travel 25%

Ground travel emissions come from the combustion of fuel, primarily gasoline and diesel, within the City's Growth Management Area (GMA).

Natural Gas 19%

Emissions are produced from the combustion of natural gas, primarily for heat.

Solid Waste 4%

Emissions primarily come from the decomposition of organic material (e.g., yard trimmings and food waste in landfills.

Water-related 0.3%

Emissions related to the collection, treatment, distribution, and reclamation of water.

Changes in GHG Emissions[74]
Fort Collins, 2005-2016

12% ▼ DECREASE ELECTRICITY

6% ▼ DECREASE GROUND TRAVEL

5% ▲ INCREASE NATURAL GAS

60% ▼ DECREASE SOLID WASTE

5% ▲ INCREASE WATER-RELATED

12% ▼ DECREASE OVERALL

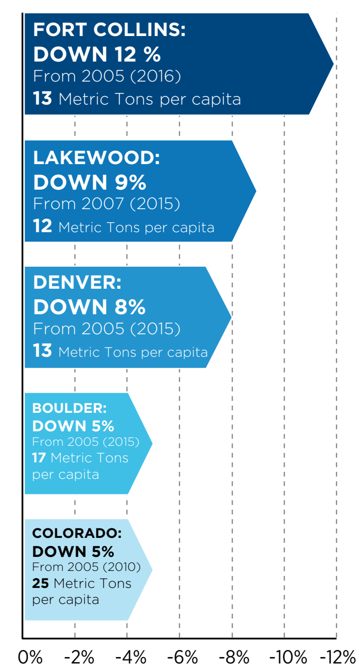
Increase in Locally installed Solar Capacity[75]
Fort Collins, 2014-2016

3.5x

Overall emissions have decreased since 2005.

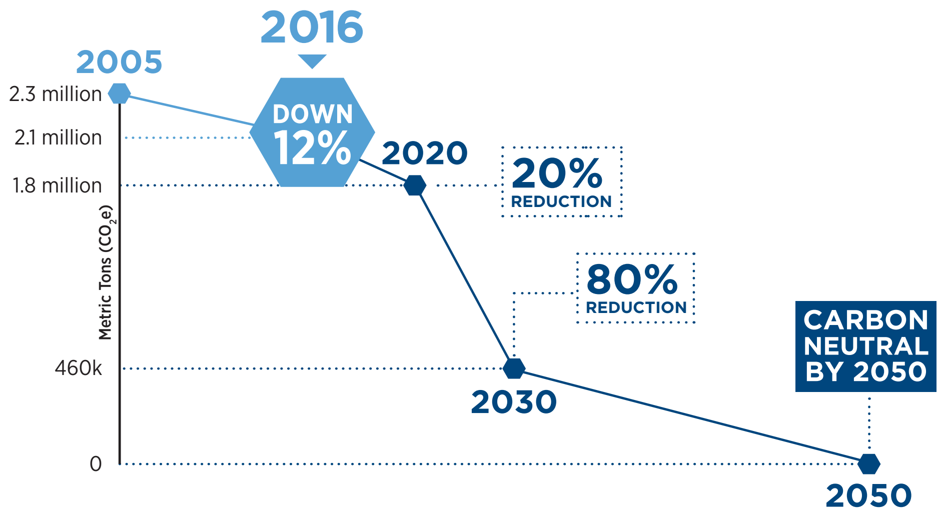
The city is more than halfway to its 2020 goal. As of 2016, GHG emissions in Fort Collins were down 12% (a net reduction of 275,813 Metric Tons) despite a 25% increase in population and a growing economy. This translates to a 28% reduction (or 5 metric tons) per capita since 2005. However, emissions attributable to natural gas and water-related uses increased.

GHG COMPARISON[76]
Fort Collins, 2016

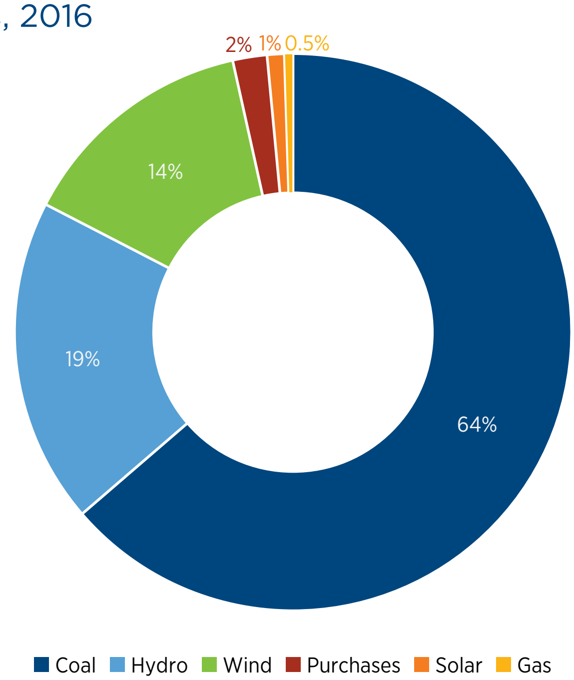


Note: Community carbon accounting practices differ; efforts were made to align the data shown here to the extent possible.

GHG Emission Reduction Progress & Targets[77]
Fort Collins, 2014-2016



Electricity Resources Mix[78]
Fort Collins, 2016



Zero net carbon electricity may be closer than we thought.

By 2020 the City is aiming for 20% of our electricity to be produced from wind and solar resources and to limit coal resources to no more than 60%. A study by the Platte River Power Authority (PRPA) found that a zero net carbon electricity portfolio for Estes Park, Fort Collins, Longmont, and Loveland could be achieved by 2030. If realized, it will contribute significantly to the City's goal of an 80% overall GHG reduction by 2030. Increasing electrification, including the use of electric vehicles and electric heat pump systems to displace natural gas consumption, would continue to drive down emissions towards the 80% reduction goal.

GHG EMISSIONS IN FORT COLLINS

How does the City track GHG emissions?

The City tracks emissions annually through a community carbon inventory. The inventory uses 2005 as a baseline year and follows standard protocol to quantify GHG emissions including CO_2, CH_4, N_2O. The inventory fluctuates from year-to-year as we experience the impacts of weather, get access to better data, or learn something new about how GHGs impact the atmosphere. The City makes the results of this inventory available through its climate dashboard.

What are GHGs

Greenhouse gases (GHG) are gases in the atmosphere that can absorb and emit heat. Science attributes a warming of the Earth's atmosphere to an increase in GHGs.

What is CO_2e?

Carbon dioxide (CO_2) is a GHG emitted naturally and from fossil fuel combustion for energy and heat (e.g., coal, natural gas, gasoline and diesel). Global warming contributions from other greenhouse gases (such as methane) are referred to in terms of "carbon dioxide equivalent" or CO2e, which represents the amount of CO2 that would have the same global warming potential as other GHGs. Community carbon inventory goals are tracked in terms of tons of CO2e.

Cross-Cutting Benefits

Strategies that reduce GHG emissions often have the potential to create benefits across multiple City goals. Some of these benefits include a stronger local economy, human health and well-being, community resiliency, and affordability and equity. Strategies should be considered and implemented with these cross-cutting impacts in mind to maximize the potential benefit and avoid focusing on single benefit solutions. The following are some examples that illustrate this:

- Reducing land use for single occupancy vehicles (parking and driving lanes) can reduce GHG emissions while allowing for increased green space (habitat), walkability (human health, equity), and air quality (human health, equity).
- Local foods create local jobs, reduce emissions associated with factory farming and transportation, and promote healthier eating.
- Electric vehicles, in conjunction with a decarbonized grid, improve local air quality, reduce greenhouse gas emissions, and support a modernized, dynamic electric grid.
- Green infrastructure (using natural systems to manage stormwater), promotes biking and walking (reducing GHG emissions), creates habitat, reduce urban heat island effects, and improves local air and water quality.
- Composting yard trimmings and food scraps (organic material), significantly reduces GHG emissions from landfills while also creating business opportunities for handling/processing organic material and for selling finished compost (improved local economy).
- Managing and protecting our urban tree canopy not only creates a pleasant streetscape environment for walking or biking, it also helps reduce energy needs for buildings in the summer and limits the impact of the urban heat island effect.

NATURE IN THE CITY

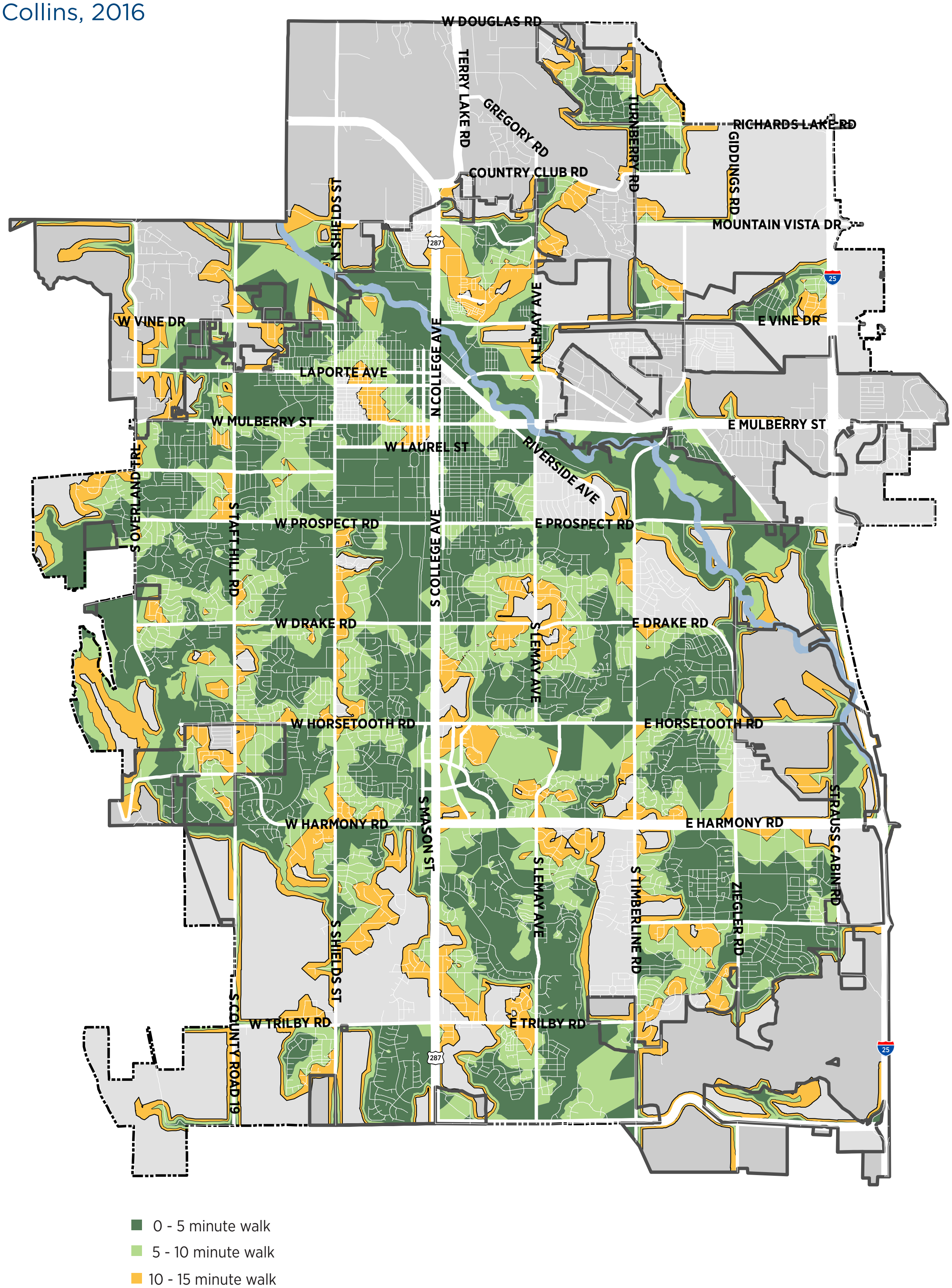
The City of Fort Collins has been committed to protecting natural areas and habitats within the city and region for more than forty years. In 2015, the City adopted the Nature in the City Strategic Plan with the vision of providing a connected open space network accessible to the entire community that provides a variety of experiences and functional habitat for people, plants, and wildlife. Much more than a traditional parks and open space plan, Nature in the City was developed with the city's projected buildout population of 230,000-250,000 in mind. It stresses the importance of creating, retaining, or reclaiming natural elements and systems within the urban core, not just in public parks and open spaces, but as part of established neighborhoods and future developments. Consistent with other City plans, this vision will be accomplished through a triple-bottom-line approach considering benefits and impacts of environmental, economic, and social variables.

Nature in the City identifies three priority goals:

1. **Easy access to nature, high quality natural spaces.** Ensure every resident is within a 10-minute walk to nature from their home or workplace. (See map at right.)
2. **High quality natural spaces.** Conserve, create, and enhance natural spaces to provide diverse social and ecological opportunities.
3. **Land stewardship.** Shift the landscape aesthetic to more diverse forms that support healthy environments for people and wildlife.

Ongoing implementation of Nature in the City directly supports the City's CAP goals by enhancing the natural systems that store and sequester carbon and providing other environmental co-benefits such as improved air and water quality and reduced water, fertilizer, and pesticide use. Nature in the City plays a critical role in linking the City's climate, health, and equity goals.

Access to Nature[79]
Fort Collins, 2016



Where We're Headed

In the past few years, a pathway to a carbon neutral city has started to take shape. With the electrical grid moving towards increased levels of renewable energy sources, and the associated carbon emissions falling accordingly, there are a variety of choices that will need to be considered as part of the City Plan update from a climate action standpoint, but also from a triple bottom line standpoint. These choices, and their associated trade-offs, will be driven by the extent to which we continue to pursue:

Carbon neutrality.

Our push towards a Zero Carbon / 100% renewable grid through support of both remote utility scale and local distributed renewable resources.

Greater electrification.

Electrification of everything, from vehicles to home heating, with battery storage and distributed energy resources to manage grid reliability.

Transportation innovations.

An increased shift to shared services like car share, ride share, bike share, and eventually a shift towards autonomous vehicles, changing our ideas of "public transit" and enabling greater electrification of the transportation sector (through efforts such as the EV Readiness Roadmap).

Sustainable building practices.

Aggressive building efficiency targets and programs targeting the existing building stock and partnerships with local businesses, and district heating strategies to address our climate goals and reduce waste.

Targeting natural gas.

Currently, natural gas accounts for 19% of the community's emmissions. Achieving the 2030 goals will require a community conversation about the long-term role of natural gas in our home heating.

Increased density.

Increasing densities along Enhanced Travel Corridors and in Priority Infill and Redevelopment Areas to enable the shared economy, support affordable housing goals, walkability, and increase opportunities to preserve or reclaim natural elements and systems within the urban core.

Waste reduction & recycling.

Working with regional partners to plan for what comes after Larimer County Landfill reaches capacity in 2025 to expand opportunities for recycling and composting; reducing waste at the source through conscientious consumer choices.

Climate innovations.

Opportunities for new businesses and business models to be formed to create economic value from carbon reduction and climate adaptation activities, building on existing partnerships, such as FortZED, Colorado Clean Energy Cluster, Colorado Water Innovation Cluster, and others.

Collaboration at multiple scales.

Ensuring our actions are leveraging best practices and supporting global efforts will require collaboration at the regional, state, national, and when appropriate, international scale.

What Does it Mean for City Plan?

Evaluation of potential trade-offs.

Based on recent trends, we have the potential to reduce GHG emissions to the 80% mark by 2030, in a manner that is cost competitive with the business-as-usual scenario. However, this goal is only achievable if City Plan lays the groundwork for doing so, in line with the cross-cutting benefits described previously. The City Plan update presents an opportunity to help the community visualize the types of development patterns and transportation shifts that will be required to realize climate action goals; explore potential tradeoffs of different development patterns or policies on air quality, health, natural systems, and equity; and to help define a path forward that is clear and achievable.

Stronger focus on adaptation and resiliency.

Climate action includes both mitigation (reducing emissions) and adaptation and resiliency (how we prepare for, adapt to, and increase our resiliency to climate impacts). The City currently lacks a formal adaptation and resiliency plan, though other policy documents guide longer-term efforts. Stronger policy emphasis is needed in City Plan to improve the community's preparedness and resilience in the face of changes in climate, weather, and resource availability.

Integration of recent City initiatives, best practices, and emerging trends.

Numerous plans have been completed since 2011 to support City Plan's implementation, including the Climate Action Plan: Framework and Nature in the City. While the community's core values have not radically changed since 2011, in some instances, City Plan policies now lag behind, or even conflict with more recent City initiatives or best practices. New concepts, such as the 10-minute walk to nature goal established as part of Nature in the City, will need to be integrated as part of City Plan growth scenarios and subsequent Structure Plan/policy updates, and other policy updates to reflect recent innovation/best practices related to green infrastructure and energy are also needed.

KEY CHOICES FOR THE ROAD AHEAD...

Photo: City of Fort Collins

The information provided in this report will be used to help inform Phases 2 and 3 of the City Plan update process: Community Visioning and Scenario Development. Over the coming months, we will be asking the community to consider a variety of key choices for the road ahead. This section articulates a series of key choices for each of the focus areas to get the conversation started. Key choices take into account:

- **Major drivers.** Population projections, land supply, and housing and employment demand drive our plans for the future, but so do community preferences and desired outcomes.
- **Plan inputs.** Although both qualitative and quantiative inputs will need to be considered as part of the scenarios discussion, key choices are focused primarily on inputs the City can directly influence and inputs we can "test" in light of the major drivers above. For example, how can we most efficiently accommodate future population growth based on our land use patterns, transit service, housing types/location, and transportation alternatives?
- **Potential tradeoffs.** Goals created for one focus area may have unintended consequences in another focus area. A critical part of the scenarios discussion will be consideration of the types of tradeoffs the community is willing to make. Housing affordability, neighborhood impacts, commuting/jobs-housing balance, traffic and parking system implications, air quality, ridership, climate action, water conservation, energy efficiency, and equity and health implications.

Ultimately, we'll need to determine a preferred direction for the future that recognizes the interdependent economic, social, and enviornmental implications of our policies and decisions.

Focus Area #1: Buildout & Land Supply

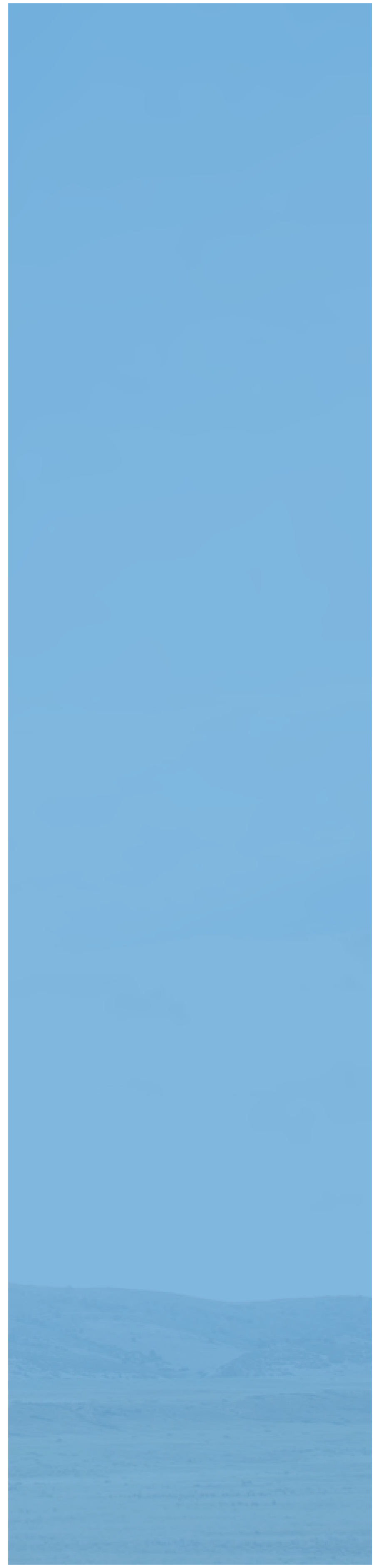
Based on current trends, Fort Collins is expected to have exhausted its vacant buildable land supply by 2040. The majority of remaining vacant land is not served by City sewer and water utilities, which could impact the availability, timing, and pricing of future development in these areas. Some of the many questions we must explore as we consider the road ahead include:

- **Structure Plan alignment.** What changes to the Structure Plan map are needed to ensure our supply of land is more closely aligned with future demand and community priorities? What steps do we need to take to ensure future development is built in line with the densities and overall mix of uses contemplated in the plan?
- **Infrastructure and services.** What infrastructure and service deficiencies need to be addressed to support the full utilization of our remaining land? How can we most effectively address those deficiencies in collaboration with other service providers in the GMA and region?
- **Infill/redevelopment priorities.** To what degree are we willing to support (and potentially encourage) infill and redevelopment at higher densities than have occurred in the recent past? Should additional areas by identified as priorities beyond those that are identified in City Plan currently?
- **Land use/transportation integration.** How can we best support the investment we've made in MAX and other transportation and mobility improvements with our future land use decisions? Where might investments in additional transportation and mobility improvements be most effective to help us meet our climate action, equity, and affordability goals?
- **Neighborhood character.** How can we preserve the character of our established neighborhoods while still encouraging infill and redevelopment in priority areas? How can we more effectively address transitions between priority infill and redevelopment areas and established neighborhoods?
- **Climate action.** Will we be able to achieve our climate action goals based on our current Structure Plan map and recent development trends? If not, where are shifts needed most? How do these shifts relate to other aspects of the plan?

Focus Area #2: Housing Access

Since 2000, Fort Collins and Larimer County have produced more jobs than housing units. This jobs-housing imbalance has recently accelerated, leading to fewer opportunities for people employed in Fort Collins to live here. At the same time, rents and home prices are increasing faster than wages. As a result, there are fewer and fewer affordable housing opportunities available for a larger share of the population. Some of the many questions we must explore as we consider the road ahead include:

- **Housing capacity.** Are we willing to convert employment or industrial designated lands to residential uses in order to expand our housing capacity? If so, where?
- **Higher-density housing.** Are we open to encouraging higher-density development in Fort Collins to create more capacity and opportunities for housing, specifically affordable housing? If so, where and how?
- **Housing diversity.** What strategies are we willing to pursue to achieve the more diverse housing options (e.g., accessory dwelling units, small lot single-family) supported by our current policies?
- **Affordable housing strategies.** What additional strategies could we pursue in the short-term to help ensure we achieve our 2020 affordability goals? What shifts are needed in City Plan to help support our longer-term goals for affordability?
- **Jobs-housing balance.** What steps can we take to ensure more people who work in Fort Collins can afford to live here if they choose to do so?



Focus Area #3: Economic Health

Fort Collins has captured a smaller share of commercial and industrial development over the past decade as the economic activity within the county has shifted toward I-25. While the city has an adequate supply of land for employment uses within the GMA, available land may not be development ready or in locations that are competitive for capturing future employment growth. Some of the many questions we must explore as we consider the road ahead include:

- **Lands for future employment.** Are we willing to accept the loss of employment designated land in order to increase the capacity for housing and/or other uses that help us achieve our goals for the future? Are we willing to shift the focus and designations of residential lands to create better opportunities for economic growth? Should we embrace development along I-25 in order to create more areas for economic growth?

- **Job diversity.** What types of industries is Fort Collins best suited to retain and attract in the future? How do these industries align with the skills of our workforce, and development and redevelopment opportunities? How do we ensure jobs continue to grow at both ends of the wage spectrum?

- **Jobs-housing balance.** Is the community comfortable importing additional workers over time, or should we explore ways to increase housing supply to better balance our jobs-housing ratio?

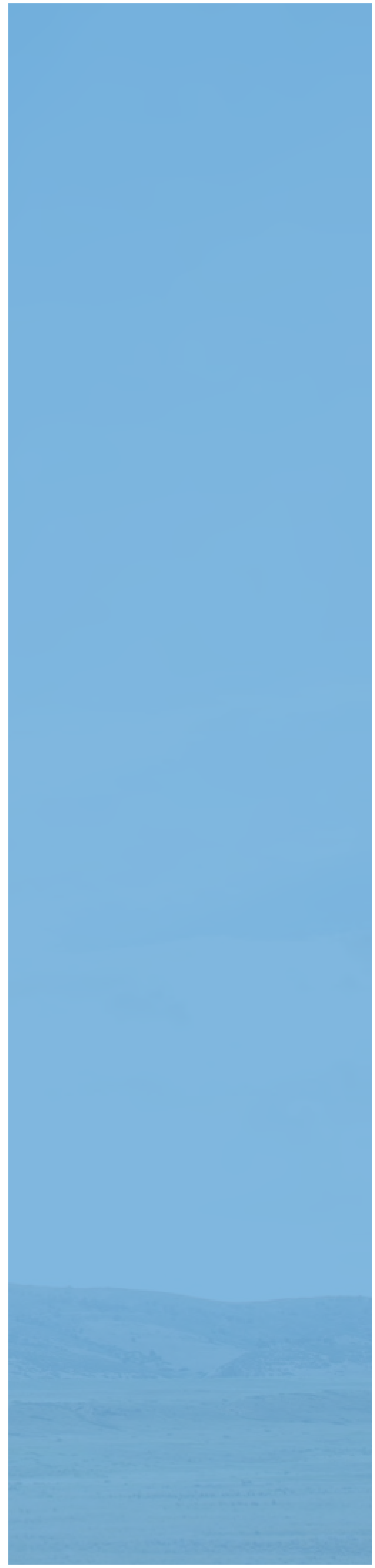
- **Economic resiliency.** How does the city preserve opportunity, access, and affordability for workers/residents in support industries? As regional retail, entertainment, and flex space grows to the south, how will that impact Fort Collins' travel patterns, development patterns, and revenue environment?

- **Climate economy.** How can we help the business community adapt to the challenges presented by climate change and leverage opportunities to create new economic activity through innovation in climate adaptation? To what degree are we willing to invest in efforts to generate economic opportunities related to clean energy and climate adaptation? How willing are we to impose regulations and restrictions in order to achieve our climate goals?

Focus Area #4: Transportation & Mobility Options

Adopting new approaches to transportation planning and operations can help us to make the most efficient use of limited transportation resources. In addition, technological innovations and new forms of transportation may alter the way we travel. Some of the many questions we must explore as we consider the road ahead include:

- **Vehicle miles traveled (VMT).** What steps can we take to continue or accelerate a reduction in VMT, which means a reduction in single occupancy vehicle trips?
- **Modal priorities.** Are reductions in vehicular level of service (LOS) acceptable along corridors in exchange for supporting other modes (such as transit or bicycling)? What are the tradeoffs associated with prioritizing one mode over the other in certain locations?
- **Emerging mobility trends.** How will the shared economy and changing technologies influence travel in the future? What does a comprehensive transportation program aimed at reducing single occupancy vehicle trips look like?
- **Land use/transportation integration.** How can we best support the investment we've made in MAX and other transportation and mobility improvements with our future land use decisions? Where might investments in additional transportation and mobility improvements be most effective to help us meet our climate action, equity, air quality, affordability, and other goals?
- **System enhancements.** What factors should we use to prioritize investments in our transportation system (both improvements and expansion)?
- **Transit priorities.** What does the City's investment in Transit look like in the future? Will there be a shift towards a system based on productivity or coverage?
- **Equity.** What metrics should we evaluate to understand if our system provides for comfort, safety, connectivity, and ease of mobility for users of all ages and abilities?



Focus Area #5: Climate Action

As we approach our 2020 CAP targets and look ahead to our 2030 and 2050 targets, the community preferences captured in City Plan will shape the next generation of climate action initiatives. Some of the many questions we must explore as we consider the road ahead include:

- **Density/affordability.** Are we willing to accept higher-density development in more areas of the city in as a means to support affordable housing options that encourage transit usage and help reduce VMT? If so, where?
- **Development patterns.** Will we be able to achieve our climate action goals and increase resiliency to climate change based on our current Structure Plan map and recent development trends? If not, where are shifts needed most? How do these potential shifts relate to other community priorities?
- **Transit investments.** Are we willing to invest in the expansion of our MAX system and other transit options in other Enhanced Transit Corridors (e.g., Harmony or College) or other locations? If so, what types and where?
- **Emerging mobility trends.** To what extent should we be proactive in regulating and managing autonomous and shared vehicle services to avoid unintended consequences that are antithetical to our broader community goals?
- **Built environment.** Are we willing to support advanced building energy codes, address the existing building stock, encourage the increased shift to electricity, and the integration of renewables and green infrastructure into the built environment?
- **Electric vehicle infrastructure.** Are we willing to create the electric vehicle infrastructure to support the electric vehicle growth needed to reduce transportation emissions to meet our climate action goals?
- **Climate economy.** How can we help the business community adapt to the challenges presented by climate change and leverage opportunities to create new economic activity through innovation in climate adaptation? To what degree are we willing to invest in efforts to generate economic opportunities related to clean energy and climate adaptation? How willing are we to impose regulations and restrictions in order to achieve our climate goals?

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REPORT CARD

Photo: City of Fort Collins

The City of Fort Collins is committed to continuous improvement. As we embark on this update to City Plan, it is important to step back and assess our progress—since the last update in 2011, but also since City Plan was first adopted in 1997. This section highlights our successes over the past twenty years, the challenges we face, and opportunities we see for improvement in each of the principle and policy sections found in City Plan:

- Economic Health
- Environmental Health
- Community and Neighborhood Livability
- Safety and Wellness
- Culture, Parks, and Recreation
- High Performing Community
- Transportation

These sections generally align with the seven Key Outcome Areas reflected in the City Council's Strategic Plan and the City's Budgeting for Outcomes process. This alignment reflects the City's longstanding commitment to the community of fostering accountability and transparency. This Report Card grades draw from a combination of public input, measures tracked by the City's Community Performance Measurement Dashboard, discussions with City staff and stakeholders, and the many department strategic plans and functional plans that support implementation of City Plan on an ongoing basis. Grades in each section reflect, at a generallevel, the degree to which progress is being made on major implementation initiatives in each area.

ECONOMIC HEALTH

Principles and policies in this outcome area support a healthy and resilient economy. This section is supported by the 2015 Economic Health Strategic Plan.

GRADE	EVALUATION OF PRINCIPLES AND POLICIES	
	Economic Development - Economic Resiliency	
B-	***Successes:*** • The City has met or exceeded targets on a variety of economic health performance metrics in recent years, including: local unemployment rate, lodging occupancy rates, net percent change in local jobs, and new commercial permit dollar volume per capita.	***Challenges/Opportunities for Improvement:*** • To date, buildout has primarily been looked at from a residential standpoint. Buildout for employment uses should be considered as part of future growth scenarios and updated policies to guide the positioning of remaining land. • The overall mix of industrial versus employment uses, and general commercial/retail uses versus mixed-use development must all be considered, along with the viability of designated land for these purposes with respect to access and infrastructure needs. • The affordability of doing business and of living in Fort Collins is an attribute that will impact economic resiliency. As land and housing prices grow, affordable options for all businesses and residents will need to be addressed.
	Economic Development - Growth of the Innovative Economy	
B	***Successes:*** • The City has created a culture and business environment that supports innovation. Partnerships with CSU and non-profits, as well as investments in incubator spaces, such as Innosphere, have leveraged R&D activities that are creating new local businesses and have produced one of the highest rates of patents produced per 10,000 residents in the US. • The facilities and partnerships that foster research and development activities, coupled with an attracted talent pool has large, national and international companies funding research in Fort Collins.	***Challenges/Opportunities for Improvement:*** • While there are many new businesses being formed in the city and local jobs are growing, there is a need for spaces for these companies to grow into. Limited vacancy in the industrial market and a lack of new Class A office space development may lead companies to look outside of Fort Collins to expand. An assessment of areas currently designated for future employment growth is needed to determine whether they have the attributes needed to attract employers. • The design and formats of modern workspaces have placed a greater emphasis on collaboration and proximity to other companies, entertainment, and housing. Strategies are needed to help create new and evolve existing employment areas into more mixed-use areas with a variety (size) of work spaces. These mixed-use areas, much like downtown areas, require partnerships and strategies to support the areas, which reaches beyond land use policy.

<table>
<tr><th>GRADE</th><th colspan="2">EVALUATION OF PRINCIPLES AND POLICIES</th></tr>
<tr><td rowspan="2">B</td><td colspan="2">Economic Development – Support for Local and Creative Businesses</td></tr>
<tr><td>Successes:
• The City of Fort Collins has been a sponsor of arts and culture through investments in programs and facilities, such as the Lincoln Center, which help to grow and promote creative businesses in Fort Collins. Its support has diversified into promoting a wider variety of creative spaces (e.g. Carnegie Building, Southeast Creative Community Center).</td><td>Challenges/Opportunities for Improvement:
• As new businesses grow in the community they need support in a variety of ways. The City is increasingly focused on expanding access to capital for low to moderate income entrepreneurs and helping create more start ups in Fort Collins. These efforts can be expanded to support small businesses with more program efforts and capacity to provide support.
• Efforts to establish a Creative District in Fort Collins will help to continue to support and promote the arts and culture.</td></tr>
<tr><td rowspan="2">B</td><td colspan="2">Economic Development – Redevelopment Areas</td></tr>
<tr><td>Successes:
• The Midtown Planning and implementation efforts have led to the redevelopment of Foothills Mall and reinvestment in Midtown after many years of planning.
• The recently completed Downtown Plan was adopted in 2017 and provides the needed updates to the city's strategies for continued growth of downtown.</td><td>Challenges/Opportunities for Improvement:
• Development in Targeted Infill/Redevelopment Areas like Midtown has not reflected a mix of uses and intensity that is supported by currently-adopted plans and policies.</td></tr>
<tr><td rowspan="2">B</td><td colspan="2">Economic Development – Regional Economic Development</td></tr>
<tr><td>Successes:
• The City, its regional partners involved in economic development, and local businesses leaders have started efforts to create a unified approach to promoting the region for economic growth. The Northern Colorado Economic Alliance was formed in 2014 by business leaders to develop a collaborative approach to attracting primary businesses and industries to Northern Colorado.</td><td>Challenges/Opportunities for Improvement:
• A unified, regional vision and partnerships for economic growth are still in their infancy. The City of Fort Collins may wish to help lead in creating the vision.</td></tr>
</table>

ENVIRONMENTAL HEALTH

Principles and policies in this outcome area address a wide range of topics to support the protection of Fort Collins' environmental resources, and draw from dozens of supporting plans and policies, including the Environmental Services Strategic Plan (2016).

GRADE	EVALUATION OF PRINCIPLES AND POLICIES	
	Environmental Stewardship and Resource Conservation on Private Lands	
B	*Successes:* • Adoption of the Nature in the City Strategic Plan (2015) reinforced the importance of open space and habitat on private land as part of the city's overall system.	*Challenges/Opportunities for Improvement:* • Integration of open space, conservation, and biodiversity principles as part of future development on remaining greenfield sites within the GMA, as well as part of future infill/redevelopment.
	Open Lands	
A	*Successes:* • The City's Natural Areas Program has conserved over 40,000 acres of land since 1992. • Ongoing conservation efforts are focused on the Local and Community Separator Focus Areas—a key companion to the Growth Management Area (GMA).	*Challenges/Opportunities for Improvement:* • Integration of 10-minute walk to nature goal (Nature in the City) as part of City Plan growth scenarios and subsequent Structure Plan/policy updates. • Updates to City Plan policies throughout to reinforce Nature in the City objectives.
	Energy	
B	*Successes:* • Energy conservation programs and incentives have resulted in an increase in local renewable energy production and expanded customer support for conservation. • Adoption of stronger codes and standards to support conservation and renewable energy use. • Though work with the Platte River Power Authority (PRPA) and other partners in the region, the City is continuing to diversify its energy portfolio and reduce reliance on coal and other fossil fuels.	*Challenges/Opportunities for Improvement:* • Some energy policies in City Plan lag behind current City initiatives in terms of innovation/best practices. • Ongoing work is needed to reach the city's long-term net zero energy goals. • Stronger policy emphasis is needed in City Plan to improve the community's preparedness and resilience in the face of changes in climate, weather, and resource availability.

<table>
<tr><th>GRADE</th><th colspan="2">EVALUATION OF PRINCIPLES AND POLICIES</th></tr>
<tr><td rowspan="2">B</td><td colspan="2">Air Quality</td></tr>
<tr><td>Successes:
• In 2016, the City worked with its partners to develop a Regional Air Quality Tool for monitoring/planning purposes.
• The City continues to target reductions in local source contributions to ozone causing pollution (e.g., vehicles and lawn and garden equipment), and participate in regional planning for State regulations of transported emissions (e.g., oil and gas)</td><td>Challenges/Opportunities for Improvement:
• External forces, such as wildfires, have had a negative impact on outdoor air quality multiple times in recent years.
• Fort Collins' ground-level summertime ozone levels continue to be the highest along the Front Range.
• An update to the City's Air Quality Plan is underway and will be coordinated with updates to City Plan policies in this area.</td></tr>
<tr><td rowspan="2">B</td><td colspan="2">Climate Change</td></tr>
<tr><td>Successes:
• Adoption of Climate Action Plan (CAP) Framework in 2015, with the commitment to achieve carbon neutrality by 2050.
• Significant progress being made toward CAP implementation; close coordination among City departments on CAP initiatives.</td><td>Challenges/Opportunities for Improvement:
• Broader community conversation about the potential trade-offs between CAP goals and other community goals (e.g., land use, transportation, equity, housing, air quality) needed as part of the City Plan process.</td></tr>
<tr><td rowspan="2">B</td><td colspan="2">Waste Resources Management</td></tr>
<tr><td>Successes:
• Fort Collins currently diverts about 58 percent of its waste stream as a result of recycling, composting, and waste reduction efforts and incentives.</td><td>Challenges/Opportunities for Improvement:
• Waste diverted to the Larimer County Landfill continues to increase, and the landfill is approaching capacity. Consideration of future landfill siting opportunities as part of City Plan growth scenarios/policies is needed (particularly as they relate to CAP goals).
• Ongoing work is needed to reach long-term net zero waste goals within the community and the City organization; stronger emphasis on priority initiatives is needed in City Plan policies.</td></tr>
<tr><td rowspan="2">B</td><td colspan="2">Stormwater and Flood Management</td></tr>
<tr><td>Successes:
• Improvements made and regulations implemented as Fort Collins recovered from the 1997 floods have made the community more resilient; damage from the 2013 floods along the Front Range was minimal in Fort Collins when compared to that sustained by other communities.</td><td>Challenges/Opportunities for Improvement:
• Clear process needed for evaluating and resolving competing interests in different aspects of City Plan policies when they arise (e.g., historic preservation and floodplain protection)
• Stronger emphasis on low-impact development (LID) needed in City Plan, and in City projects.</td></tr>
</table>

GRADE	EVALUATION OF PRINCIPLES AND POLICIES	
	Water Resources	
B	***Successes:*** • The City has had formal policies in place to guide the acquisition, development, and management of the city's water supplies since 1988 (last updated in 2012), and has fostered a strong conservation ethic within the community and City organization. • The City actively works with regional partners, municipal providers, local irrigation companies and others on water issues. • The City has consistently been in full compliance with applicable effluent quality requirements. • The North Front Range Metropolitcan Planning Organization is in the process of updating its Traffic Model to allow for consideration of water supply when modeling the impacts of future growth.	***Challenges/Opportunities for Improvement:*** • Multiple water districts serve the GMA; requirements for water rights and costs vary by district, creating different challenges and opportunities for housing affordability, infrastructure capacity, and other considerations unique to each district. • City Plan growth scenarios and subsequent Structure Plan map/policy updates need to reflect this multi-district dynamic, and be reviewed against the City's 2012 Water Supply and Demand Management Policy.
	Poudre River Corridor	
B	***Successes:*** • Improvements made and regulations implemented as Fort Collins recovered from the 1997 floods have made the community more resilient; damage from the 2013 floods along the Front Range was minimal in Fort Collins when compared to that sustained by other communities. • The City recently completed a river assessment and Report Card for the Poudre River to help the city evaluate operational, management, and policy options for preserving or enhancing the river's health.	***Challenges/Opportunities for Improvement:*** • Integrate Nature in the City's comprehensive biodiversity goal, and recommendations from the State of the Poudre River Assessment as part of City Plan growth scenarios and subsequent Structure Plan/ policy updates as appropriate.

COMMUNITY AND NEIGHBORHOOD LIVABILITY

Principles and policies in this outcome area guide the growth and development of the city. Core values reflected in this section include the community's longstanding commitment to a compact land use pattern within a well-defined boundary. The Structure Plan map and supporting principles and policies are also contained in this section and address distinctions in use and character between different types of places in the community.

GRADE	EVALUATION OF PRINCIPLES AND POLICIES	
A-	**Growth Management**	
	Successes:	***Challenges/Opportunities for Improvement:***
	• The City has IGAs in place with Larimer County and surrounding jurisdiction to support the implementation of Growth Management Area (GMA) objectives related to compact development and an interconnected system of open lands. • Community separators were established with Wellington and Loveland following the initial GMA policies in 1997. • Presence of the GMA boundary has helped reinforce City Plan's infill and redevelopment focus over time.	• Some adjustments to the GMA are pending for the I-25 Corridor, raising questions as to how flexible the boundary is intended to be. • In coordination with Larimer County, the City has been working to annex remaining county enclaves in accordance with an existing intergovernmental agreement. Upon annexation, the city is obligated to serve these areas with electric utilities. One of the largest remaining enclaves includes large portions of the East Mulberry Corridor. A more in depth analysis of utilities, fiscal impacts, and land use/transportation considerations will be necessary, and will occur independent of the City Plan process. However, the broad impacts and opportunities associated with the annexation of this area should be considered in the context of the City Plan process—particularly as it pertains to the future of existing service districts and the potential for regional partnerships as a way to expand the city's service provision capabilities in underserved areas.
B-	**Infill and Redevelopment**	
	Successes:	***Challenges/Opportunities for Improvement:***
	• Based on adopted policies and targeted infrastructure investments, the city has seen significant infill/redevelopment in Targeted Infill/Redevelopment Areas (primarily within Downtown and near CSU). • Infill compatibility standards were adopted as part of 2012 Land Use Code amendments. • Updated detention requirements for redevelopment were adopted in 2013 to provide more flexibility for infill/redevelopment.	• There is a general lack of alignment between the Structure Plan map and the Land Use Code in Targeted Infill/Redevelopment Areas; as a result the types of projects being built in many locations reflect the minimum requirements of (or limitations of) the code versus the more aspirational concepts called for by City Plan. • A stronger linkage is needed between proposed land use intensities, infrastructure capacity/availability, and code requirements.

GRADE	EVALUATION OF PRINCIPLES AND POLICIES	
	Housing	
C	*Successes:* • The City has pursued a range of strategies to expand affordable and workforce housing options, as informed by the 2014 Housing Affordability Policy Study and 2015-2019 Affordable Housing Strategic Plan. • The City is an active participant in an ongoing regional housing dialogue sponsored by the Fort Collins Board of Realtors—NoCo Housing Now—to identify approaches to address housing affordability and promote regional collaboration on housing issues.	*Challenges/Opportunities for Improvement:* • Although supported by current City Plan policies, accessory dwelling units (ADUs) are not allowed in most zoning districts. • Despite efforts to address affordable housing, housing prices and rental rates continue to grow a fast pace. As well, employment growth continues to outpace housing growth which adds pressure to the housing market and also has increased the amount of in commuting. A balanced plan for growth is needed to ensure mis-matches in development trends do not continue to exacerbate affordability issues. • Despite strong policy support, diversification of the overall mix of housing types has been slow. Most new housing built over the last decade has been single-family detached, or single-family attached/multifamily in the 15-30 du/ac range. High density multifamily (greater than 30 du/ac has been less prevalent in areas where it is desired (e.g., Mason Corridor). • Rising home costs are of increasing concern in the Fort Collins and the region. A more in-depth evaluation of housing demand and supply is needed to ensure the updated plan is aligned with the community's housing needs, and to determine whether there are new strategies or tools that should be considered.
	Community Appearance and Design	
B	*Successes:* • The City adopted Streetscape Standards and Gateway Design Standards in 2013 to ensure public spaces—streets, medians, parkway strips, and I-25 corridor gateways— contribute to Fort Collins' distinct identity. • Numerous streetscape improvement projects have been implemented. • The City has consistently met or exceeded voluntary code compliance and response time to graffiti removal targets in recent years.	*Challenges/Opportunities for Improvement:* • Concerns frequently arise from residents when larger projects emerge that seem out of context, but are in fact consistent with the plan. More emphasis is needed on the desired end state and rationale behind the particular land use patterns that the plan encourages in different locations. • Increased clarity on the types of transitions that are appropriate in different contexts is also needed.

GRADE	EVALUATION OF PRINCIPLES AND POLICIES	
B	**Historic Preservation**	
	Successes: • The City adopted design guidelines for the Old Town Historic District (2014), River Downtown Redevelopment Zone District (2014), and Old Town Neighborhoods east and west of Downtown (2017) to guide infill and redevelopment and maintain the historic character of these areas. • Work is currently underway on code updates to further address transitions between Downtown and adjacent neighborhoods. • The City has worked to update and streamline policies and procedures that guide the review of historic properties.	***Challenges/Opportunities for Improvement:*** • The Historic Preservation program's foundational plan (an element of City Plan) was last updated in 1996; policy guidance provided as part of the Community and Livability section is minimal. • Strengthen policy foundation for historic preservation and adaptive reuse as part of Structure Plan place types, and other policy sections (e.g., economic health).
B	**Noise Pollution Mitigation**	
	Successes: • The City has increased enforcement in areas prone to high levels of noise and party complaints; resulting in a lower number of complaints in 2017, than in prior years.	***Challenges/Opportunities for Improvement:*** • Continued focus and proactive effort is needed on reducing the number of complaints, especially with the off-campus student population. • Continued focus is needed on efforts to reduce train horn noise along the Mason Corridor.
B-	**Structure Plan Map**	
	Successes: • Key themes that informed the creation of the original Structure Plan in 1997 are firmly embedded in City plans and policies throughout the organization and remain valid today. • Although the overall mix of land uses has shifted somewhat, Fort Collins' land use framework is generally consistent with what was envisioned in 1997. In particular, the city's "green" infrastructure—the Poudre River Corridor, and open spaces/ community separators have consistently been implemented.	***Challenges/Opportunities for Improvement:*** • Some Structure Plan concepts have been more difficult to implement (e.g., neighborhood centers and mixed housing types) than others, leading to questions about market viability and other potential barriers. The overall mix of land uses depicted on the Structure Plan map needs to be reviewed and adjusted to reflect evolving trends in residential, employment, and retail development. • Individual place types need to be reviewed and recalibrated in response to the above considerations. • Full buildout of the Structure Plan map needs to be evaluated within the context of Climate Action Plan goals, as well as other community priorities.

<table>
<tr><th>GRADE</th><th colspan="2">EVALUATION OF PRINCIPLES AND POLICIES</th></tr>
<tr><td rowspan="3">B-</td><td colspan="2">Structure Plan Principles and Policies</td></tr>
<tr><td>Successes:</td><td>Challenges/Opportunities for Improvement:</td></tr>
<tr><td>Many of the design principles reflected in this section are being successfully implemented as part of the City's code and accompanying design manuals, or through supplemental plans and programs.</td><td>The intent behind the Structure Plan map and the accompanying principles and policies needs to be more clearly conveyed, as does the relationship between individual place types and other community priorities (e.g., CAP goals, affordable housing, and transportation).
More guidance is needed regarding the types of uses and density transitions that are appropriate between different districts and neighborhood contexts to promote compatibility.
A stronger focus on the integration of land use/transportation considerations is needed.</td></tr>
</table>

SAFETY AND WELLNESS

Principles and policies in this outcome area support a safe community and promote community wellness through opportunities for residents to lead healthy and active lifestyles. One of the key successes in this Outcome Area was the creation of the City's Department of Social Sustainability in 2012, which promotes healthy, diverse, equitable, accessible community values. The department has completed additional work since then—including a Social Sustainability Strategic Plan, Social Sustainability Gaps Analysis, and Human Services Partners Community Snapshot to help inform City policies and programs in this area.

<table>
<tr><th>GRADE</th><th colspan="2">EVALUATION OF PRINCIPLES AND POLICIES</th></tr>
<tr><td rowspan="2">B</td><td colspan="2">Community Safety</td></tr>
<tr><td>Successes:
• Levels of service and targets established by the City's police, fire, and emergency management services teams are largely being met or exceeded.
• Efforts to improve roadway safety for motorists, bicyclists, and pedestrians have been effective in keeping the City in line with its performance target and detailed information is being tracked by traffic operations to evaluate progress over time.
• Fort Collins Utilities is consistently in compliance with drinking water quality standards.</td><td>Challenges/Opportunities for Improvement:
• Average response times for police Priority 1 calls exceeded the target; a variety of steps are being taken to fill gaps and effectively measure services.
• Fire response times in the Urban Area were below the City's target in Q3 2017.
• The number of vehicle crashes increased from 2012 to 2015 with a decrease in 2016.</td></tr>
<tr><td rowspan="2">B</td><td colspan="2">Community Wellness – Support for Healthy and Active Lifestyles</td></tr>
<tr><td>Successes:
• Fort Collins has over nearly 100 miles of trails and continues to expand its bicycle facilities.
• Usage of the City's paved trails has consistently met or exceeded targets since 2015.</td><td>Challenges/Opportunities for Improvement:
• Strengthen equity considerations related to healthy and active lifestyles in the vision, principles, and policies.
• Expansion of the Safe Community Outcome Area metrics to include health and wellness considerations—building on those established as part of the Social Sustainability Plan.</td></tr>
<tr><td rowspan="2">B</td><td colspan="2">Community Wellness – Healthy and Local Food Access</td></tr>
<tr><td>Successes:
• Updated land use code to ensure urban agriculture is allowed in every zone district in the city.
• Adopted a policy that defines parameters for appropriate agricultural activities—grazing, crop production, and community gardens—on lands managed by the Natural Areas Program.
• Ongoing partnerships with community organizations to support the development and maintenance of community gardens.</td><td>Challenges/Opportunities for Improvement:
• Strengthen equity considerations related to healthy and local food access in the vision, principles, and policies.
• Expansion of Safe Community Outcome Area performance metrics to include healthy and local food access considerations—building on those established as part of the Social Sustainability Plan.</td></tr>
</table>

CULTURE, PARKS, AND RECREATION

Principles and policies in this outcome area support diverse arts and cultural experiences, and parks and recreation opportunities to meet the needs of a changing community. This chapter is supported by a number of supporting plans and policies.

<table>
<tr><th>GRADE</th><th colspan="2">EVALUATION OF PRINCIPLES AND POLICIES</th></tr>
<tr><td rowspan="2">A-</td><td colspan="2">Arts and Culture</td></tr>
<tr><td>Successes:
• Visits and participation at the Lincoln Center and Museum of Discovery have consistently met or exceeded targets since 2015.
• The City's Art in Public Places program has been in place for 20 years and is going strong. Dozens of new installations have either been recently completed, or are currently underway.
• A new arts and culture directory provides information and inspiration as to how artists might be of service in the community.
• Recommendations established as part of the City's 2008 Cultural Plan have largely been implemented.</td><td>Challenges/Opportunities for Improvement:
• Update City Plan principles and policies as appropriate, based on Arts and Culture Plan update getting underway in 2018.
• Improve low and moderate income citizen access to, and participation in, City programs and facilities (2016 Strategic Plan)</td></tr>
<tr><td rowspan="2">A</td><td colspan="2">Parks and Recreation</td></tr>
<tr><td>Successes:
• Usage of the city's paved trails has consistently met or exceeded targets since 2015.
• Several major new park projects are underway or nearing completion, including the Poudre River Whitewater Park, Twin Silo Park, and Crescent Neighborhood Park.
• Major upgrades to Avery Park were recently completed and upgrades to City Park and Lee Martinez Park are in the planning stages.
• The city is actively working with the City of Loveland and Larimer County to expand regional trail connections.
• Adoption of the Nature in the City Strategic Plan (2015) reinforced the importance of access to the overall parks and open space system.</td><td>Challenges/Opportunities for Improvement:
• Integration of 10 minute walk to nature goal (Nature in the City) as part of City Plan growth scenarios and subsequent Structure Plan/policy updates.
• Participation per capita in Natural Areas programs has declined as a percentage of the population, although it remains strong. Metrics are currently being reevaluated.
• Strengthen equity considerations related to parks and recreation access and availability in the vision, principles, policies, and performance metrics for this outcome area.</td></tr>
</table>

HIGH PERFORMING COMMUNITY

Principles and policies in this outcome area support transparency and efficiency within the City of Fort Collins organization, a culture of inclusivity and accessibility, and effective communication.

GRADE	EVALUATION OF PRINCIPLES AND POLICIES	
A-	**An Active and Engaged Community**	
	Successes: • The City actively partners with numerous academic, philanthropic, non-profit, and grassroots organizations on a variety of community initiatives. • The City has more than 25 citizen boards and commissions staffed by volunteers for the purposes of studying and making recommendations to City Council in specific areas.	***Challenges/Opportunities for Improvement:*** • Incorporate a stronger focus on social equity and underserved populations as part of outreach and volunteer initiatives.
A-	**Effective Local Governance**	
	Successes: • The city has continued to improve its Budgeting for Outcomes approach to ensure the services delivered by the city are efficient and aligned with community priorities. • The City works collaboratively with others in the region on policy-setting, service provision, transportation, and other issues of mutual significance.	***Challenges/Opportunities for Improvement:*** • Incorporate a stronger focus on social sustainability in City Plan policies and supporting programs.
B-	**Communications and Technology**	
	Successes: • The Access Fort Collins platform allows residents the opportunity to contact the City with questions, comments, and service requests and ensure that their inquiry will be routed to the appropriate team member for follow up. • The City recently established a new, "one-stop" web platform for public engagement (It'sYOUR|MY|OUR FoCO).	***Challenges/Opportunities for Improvement:*** • Continued monitoring and refinement of existing web platforms is needed to ensure they are achieving intended outcomes and reach a broader cross-section of the community. • City Plan policies should be updated to reflect current City initiatives and best practices. • Incorporate a stronger focus on reaching underserved populations. • Recommendation to create a Technology Board to help ensure the city's technology is accessible, transparent, and efficient has yet to be completed.

TRANSPORTATION

Principles and policies in this outcome area support a safe, efficient, and diverse system of transportation that provides a range of mobility options to residents, visitors, employees, and businesses in Fort Collins.

GRADE	PRINCIPLES AND POLICIES		
		Successes:	**Challenges/Opportunities for Improvement:**
C	Integrated Land Use and Transportation	• Identification of pedestrian priority areas based on activity centers, schools and transit • Some transit-oriented development has occurred along the MAX line	• Broader community conversation about the potential trade-offs between CAP goals and other community goals (e.g., land use, transportation, equity, housing) needed as part of the City Plan process. • Zoning modifications to reflect high priority transit corridors • Modal priorities that reflect surrounding land use • Improve mandatory implementation of TDM strategies • Application of Air Quality Manual as part of TIA process
B	Mobility Options	• 7% reduction in VMT per capita • Bicycle Wayfinding Network Master Plan (2015) • Bicycle Master Plan (2014) • Completion of 2 ETC plans promoting biking, walking and transit	• 40% of sidewalks are insufficient width or missing • 3 bicycle and pedestrian fatalities and 8 total traffic-related fatalities in 2016 • ETCs do not identify modal priorities or account for necessary trade-offs • Modify operational strategies to incorporate Transportation-as-a-Service
C	Traffic Flow	• Average travel time on 6 major corridors stayed the same (2011 to 2016) despite population growth; less than 3 minutes per mile (Policy T 17.2) • Completion of Air Quality Manual to determine GHG implications of transportation decisions	• Travel times are unreliable and impacted strongly by AM/PM peaks • Application of Air Quality Manual in scenario analysis • Expand regional mobility options with interjurisdictional transit routes and first last mile strategies

GRADE	PRINCIPLES AND POLICIES	Successes:	Challenges/Opportunities for improvement:
B	Quality Travel Infrastructure	• Plowing and sweeping of sidewalks and bike lanes • Use of the health and equity index in the prioritization of sidewalk improvements	• 40% of sidewalks are insufficient width or missing • Enforcement of snow removal on sidewalks adjacent to residential properties • Ensuring financial resources for the maintenance of existing and new infrastructure is being met
B	Increase Awareness	• Implementation of the Bicycle Safety Education Plan • Safe Routes to School served 28 Public schools and 2 non-public schools in 2016 reaching 12,000 students and 2,700 adults • Joining of CDOT's Towards Vision Zero • Community awareness and support of the Climate Action Plan	• Endorsement of an all-encompassing trip planning app • Increase awareness and policies around TDM strategies • Structure TDM program with TDM coordinator
B	Master Streets Plan	• Application of updated classifications in development review, development impact fees and planning transportation connections • Update the Master Street Plan Classification and Larimer County Urban Areas Street Standards cross-sections to address needs for urban arterial and "Green Street" concepts as well as other context sensitive design elements.	• Develop an overlay map to reflect areas needing a future "Context Sensitive Solutions"

<table>
<tr><th>GRADE</th><th colspan="2">PRINCIPLES AND POLICIES</th></tr>
<tr><td rowspan="2">B</td><td colspan="2">Transit</td></tr>
<tr><td>Successes:
• Relocation of the new South Transit Center (STC) with improved amenities
• BRT service on Mason Corridor with modifications to local feeder routes; ridership that has increased by 90% since 2011.
• Extension of service hours into early evenings and weekends
• Partnership with CSU including improvement to CSU routes
• New regional FLEX route that serves Fort Collins, Loveland, Berthoud, Longmont and Boulder</td><td>Challenges/Opportunities for improvement:
• Complete transition to a grid route configuration
• One additional new express routes along the Mason Corridor
• Further expansion of regional routes and service frequencies
• Address routes not currently meeting service targets</td></tr>
</table>

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Sources

Setting the Stage

1. Decennial Census, US Census Bureau; City of Fort Collins
2. Decennial Census, US Census Bureau; City of Fort Collins
   See "Estimated Population Growth" for a description of the methodology used to estimate future population.
3. Decennial Census, US Census Bureau; Department of Local Affairs; North Front Range Metropolitan Planning Organization
   Methodology
   Method 1: This forecast of future population was estimated using growth rate projections for Larimer County provided by the Department of Local Affairs (DOLA). Projects were given at five-year intervals as follows: 1.9% for 2015-2020; 1.7% for 2020-2025; 1.5% for 2025-2030; 1.3% for 2030-2035; and 1.2% for 2035-2040.
   Method 2: This forecast of future population uses household estimates from the North Front Range Metropolitan Planning Organization for the Fort Collins sub-region. The number of households was multiplied by a 2.37 (estimate of average persons per household).
4. 2016 American Community Survey (ACS) 1-year estimate, US Census Bureau
5. Colorado State University
6. City of Fort Collins
7. State Demography Office, State of Colorado
8. Decennial Census, US Census Bureau
9. 2016 ACS 1-year estimate, US Census Bureau
10. Decennial Census and 2016 ACS 1-year estimate, US Census Bureau
11. 2016 ACS 1-year estimate, US Census Bureau
12. 2016 ACS 1-year estimate, US Census Bureau
13. Decennial Census, US Census Bureau; Bureau of Labor Statistics; Clarion Associates
14. 2016 ACS 1-year estimate, US Census Bureau
15. Decennial Census and 2016 ACS 1-year estimate, US Census Bureau
16. Decennial Census and 2016 ACS 1-year estimate, US Census Bureau; Clarion Associates
17. State Demography Office, State of Colorado; City of Fort Collins
18. Demography Office, State of Colorado; Clarion Associates
19. 2016 ACS 1-year estimate, US Census Bureau
20. 2016 ACS 1-year estimate, US Census Bureau
21. 2016 ACS 1-year estimate, US Census Bureau
22. The Social Determinants of Health Meta-Analysis, Colorado Department of Public Health & Environment
23. Health & Equity Index, Larimer County Department of Health and Environment; City of Fort Collins

Buildout and Land Supply

24. City of Fort Collins
25. Larimer County; Clarion Associates
26. Larimer County; Clarion Associates
27. City of Fort Collins
28. Larimer County; City of Fort Collins
29. Larimer County; City of Fort Collins
30. Larimer County; City of Fort Collins
31. Larimer County; City of Fort Collins
    Methodology
    Future development was estimated by comparing the area of vacant buildable land remaining in Fort Collins and its Growth Management Area and the area of parcels likely to redevelop, to the densities and floor area ratios seen in the past in different zoning districts.
    Vacant Buildable Lands: Buildable lands are defined as land that is vacant or heavily underutilize. They exclude future park/school sites; institutional-owned land (City, County, CSU); development proposals that are in-review, approved, or under construction; Natural Areas and conservation easements; and certain locations known to be heavily impacted by floodways or natural habitat buffer zones. Parcels smaller than 5,000 square feet were also excluded.
    Redevelopment: Parcels that are likely to redevelop in the future were identified based on whether they were underutilized. Underutilized parcels were defined as those larger than 0.25 acres that had floor area ratios less than 0.25 and had building to land ratios lower than 0.8. Tax exempt parcels, private golf courses, private open space, and other parcels that could not support redevelopment were excluded.
    Analysis: For each zoning district, assumptions were applied to

estimate the amount of land that would be used for residential and non-residential development. Estimates for the density or floor area ratio of new development were based on what was allowed in the underlying zoning, and what types of densities have been seen in these districts in the recent past. The area of buildable lands and redevelopment parcels were multiplied by these numbers to estimate the number of units and amount of non-residential development (in square feet) that could occur in each zoning district.

Housing Access

32. US Census; Economic & Planning Systems
33. US Census; Economic & Planning Systems
34. National Association of Homebuilders and Wells Fargo
Methodology
This index measures the share of homes available for sale in a metropolitan area for which a family's monthly income available for housing is at or above the monthly cost of a unit. Income is determined through family median income estimates for metropolitan areas provided by the Department of Housing and Urban Development. It is assumed that a family can afford 28% of its gross income on housing; and this number is divided by 12 to arrive at a monthly figure. Housing costs are determined by looking at sales data for metropolitan areas, as collected by CoreLogic. Monthly housing costs are calculated on the assumption that a family has a 30-year fixed-rate mortgage with a loan for 90% of the home's sales price. Interest rates for mortgages are a weighted average of fixed and adjustable during the quarter, as reported by the Federal Housing Finance Agency. Property taxes and the costs of property insurance are also factored into overall monthly housing cost estimates.
35. US Census; Economic & Planning Systems
36. City of Fort Collins
37. US Census Bureau; Economic & Planning Systems
38. City of Fort Collins
39. Economic & Planning Systems

Economic Health

40. Longitudinal Employer-Housing Dynamics (LEHD), US Census Bureau
41. US Bureau of Labor Statistics Quarterly Census of Employment and Wages (QCEW), Colorado Department of Labor
42. Comprehensive Annual Financial Report (CAFR), City of Fort Collins
43. Colorado Department of Local Affairs; Economic & Planning Systems
44. Colorado Department of Labor and Employment
45. Decennial Census and Longitudinal Employer-Household Dynamics (LEHD), US Census; Clarion Associates
46. 2015 1-year estimate and LEHD, US Census; Clarion Associates CoStar
47. CoStar
48. CoStar
49. CoStar
50. Colorado Department of Labor; Quarterly Census of Employment and Wages; Economic & Planning Systems
51. North Front Range Metropolitan Planning Organization
52. City of Fort Collins; Economic & Planning Systems

Transportation and Mobility

53. City of Fort Collins
54. 2016 ACS 1-year estimate, US Census Bureau
55. North Front Range Metropolitan Planning Organization
56. City of Fort Collins
57. City of Fort Collins
58. City of Fort Collins
59. City of Fort Collins
60. Transfort
61. City of Fort Collins
62. Transfort
63. Transfort
64. Transfort
65. Transfort
66. City of Fort Collins
67. City of Fort Collins
68. City of Fort Collins; Fehr and Pehrs
69. City of Fort Colins
70. City of Fort Collins
71. City of Fort Collins

Climate Action

72. City of Fort Collins
73. City of Fort Collins
74. City of Fort Collins
75. City of Fort Collins
76. City of Fort Collins
77. City of Fort Collins
78. City of Fort Collins

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