



SPECIAL JOINT MEETING AGENDA

**WEDNESDAY, DECEMBER 2, 2015
12:00 PM TO 2:00 PM**

**CITY COUNCIL CHAMBERS
305 3RD AVENUE EAST
TWIN FALLS, ID 83301**



**PLANNING & ZONING WORK SESSION &
COMPREHENSIVE PLAN ADVISORY COMMITTEE**

"A QUORUM OF THE CITY COUNCIL MAY BE PRESENT"

Anticipated Attendees

Planning & Zoning Commission

Nikki Boyd

Jason Derricott
Tom Frank
Kevin Grey
Gerardo "Tato" Munoz
Christopher Reid

Jolinda Tatum
Ryan Higley
Steve Woods

City of Twin Falls

Renée V Carraway-Johnson, *Zoning & Development Manager*
Jonathan Spendlove, *Zoning & Development, Planner I*
Kelly Weeks, *Zoning & Development, Planner I*
Mitch Humble, *Deputy City Manager*

Advisory Committee

Dr. Cindy Bond, *CSI/Chamber of Commerce, Past Chair/Past Chair URA*
Kevin Dane, *Selection Committee/Local Businessman*
Brady Dickinson, *Twin Falls School District*
Nancy Duncan, *City of Kimberly City Council*
Ryan Higley, *City Planning & Zoning/AOI-County*
Greg Lanting, *City Council*
Laura Wilson, *County Planning & Zoning staff*
Kevin Mahler, *Selection Committee/Local Business Owner*
Rebecca Mills Sojka, *City Council*
Tato Munoz, *City Planning & Zoning/Local Businessman*
Dan Olmstead, *Idaho Power/SIEDO*
Laura Stewart, *Chamber of Commerce/St. Luke's*
Brad Wills, *Selection Committee/Developer/URA Member/Builders Advisory Committee*

Consultant Team

Bruce Meighen, *Logan Simpson*
Megan Moore, *Logan Simpson*

AGENDA

- I. Welcome + Introductions**
- II. Comprehensive Plan Update**
 - A. Process Overview
 - B. Public Engagement to Date
 - 1. What We've Heard (Loves/ Improves)
 - 2. What We've Heard (Vision Statements)
 - C. Next Steps
- III. General Public Input**
- IV. Adjourn Meeting**

Si desea esta información en español, llame Leila Sanchez al (208) 735-7287
Any person(s) needing special accommodations to participate in the above noticed meeting should contact Lisa A. Strickland at 208-735-7267 at least two (2) working days before the meeting.



GROW WITH US



Comprehensive Plan Update

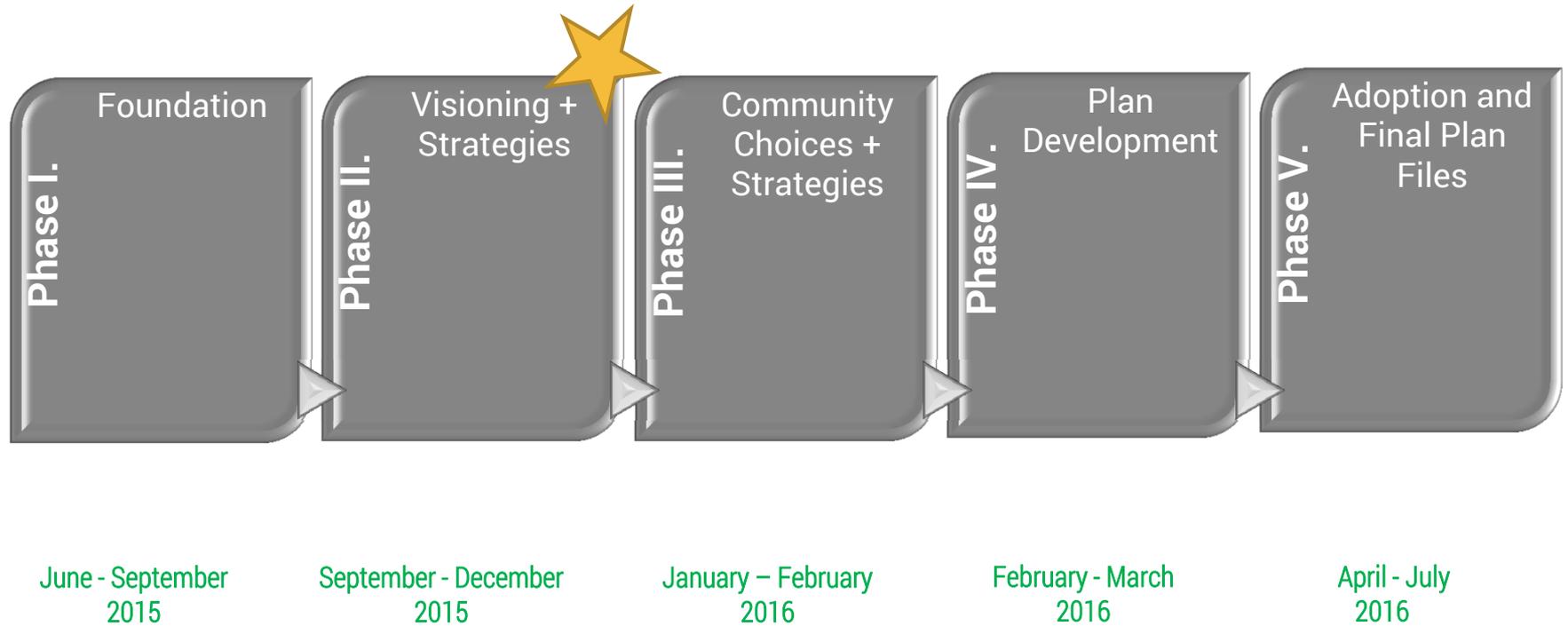
Agenda

- A. Process Overview
- B. Public Engagement
 1. What We've Heard, Loves/ Improves
 2. What We've Heard, Vision Statements
- C. Existing Conditions Highlights
- D. Next Steps



Process Overview

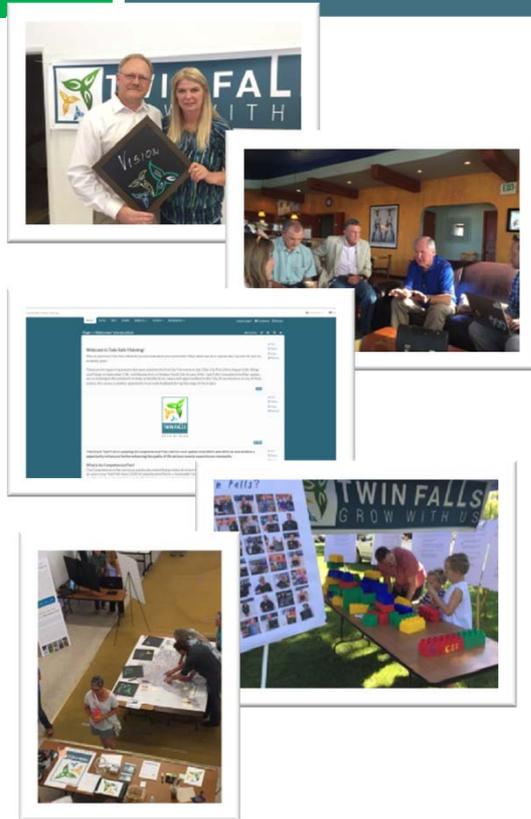
Process Overview





Public Engagement

Public Engagement



Public Engagement	Date	Participation
City Fair	7/15	~ 150
Stakeholder Interviews	7/16	25
Online Survey #1	8/20	20
City Fair 2.0	8/12	~ 100
Wings n' Things	9/12	~ 250
Oktoberfest	10/03	~ 200
Online Survey #2	11/09	In progress!



What We've Heard, Loves + Improves

What We've Heard - Loves





What We've Heard, Vision Statements

Land Use

- Create great neighborhoods with a wider range of housing types, mix of uses, and amenities.
- Encourage a transition to lower-density and cluster development at the edges of the city.
- Encourage urban housing types and infill in town, with densities and patterns reminiscent of historic Downtown neighborhoods.
- Preserve and restore older neighborhoods and buildings.



Community Character

- Retain the friendly, safe, family-oriented, and small-town community feel.
- Protect and preserve the canyon and rim environments and their vistas, while promoting the high quality of life and outdoor activities.
- Preserve the city's character and history through the designation of additional historic districts.
- Enhance the maintenance and walkability of existing neighborhoods.
- Encourage infill and development patterns that preserve and enhance the existing appearance, character, and mobility of the community.
- Preserve surrounding agricultural land.



Housing

- Promote the rehabilitation and restoration of older buildings and neighborhoods.
- Provide a wide range of housing choices for current and future residents.
- Increase housing options Downtown, to include higher densities, and high-quality rentals, condos, and live/work options.
- Diversify housing types and address housing needs for the growing number of millennials and baby boomers.
- Add affordable housing downtown.



Economic Development

- Reestablish and revitalize Downtown as the heart of the community; a thriving neighborhood, business hub, and tourist/event destination.
- Continue to attract and support the high-tech food industry, while looking to diversify the overall economic base of the community.
- Foster relationships with and recognize locally-owned and small businesses as a vital part of the community.
- Support existing industries by working to identify necessary community amenities to help attract and keep a skilled and vibrant workforce.
- Capitalize on the number of in-commuters by expanding dining and shopping options and daily services near employment centers.
- Expand the Magic Valley Regional Airport through the preservation of surrounding agricultural and industrial land and roadway connections.

Parks, Recreation, Open Space + Trails

- Expand and connect the sidewalk and trail network within neighborhoods, across arterials, and to parks and schools.
- Provide Twin Falls residents with access to a recreation center and aquatic center.
- Continue to provide and expand the range of parks and recreation activities and facilities.
- Continue to offer a wide range of community events and activities.



Transportation

- Visually connect Downtown to the canyon rim along Blue Lakes Boulevard.
- Improve circulation along primary roads, especially Blue Lakes Boulevard.
- Provide additional facilities to encourage walking and bicycling, through both on and off-street facilities.
- Expand airport service with increased destinations.
- Enhance streetscapes and beautify gateways.
- Expand and enhance the existing bus system with regular stops and schedules.



Public Facilities

- Integrate cultural and artistic opportunities into community spaces.
- Reduce impacts to the natural environment, while retaining the high-quality service and future infrastructure needs of the community.
- Support the College of Southern Idaho as an amenity, a job base, and a cultural center for Twin Falls.
- Continue to support the high-quality school system.





Next Steps

Next Steps

A. Online Now!

1. Survey #2, Vision Statement Prioritization

B. Existing Conditions

C. Opportunities/ Choices Events

1. Workshop + Online Survey #3



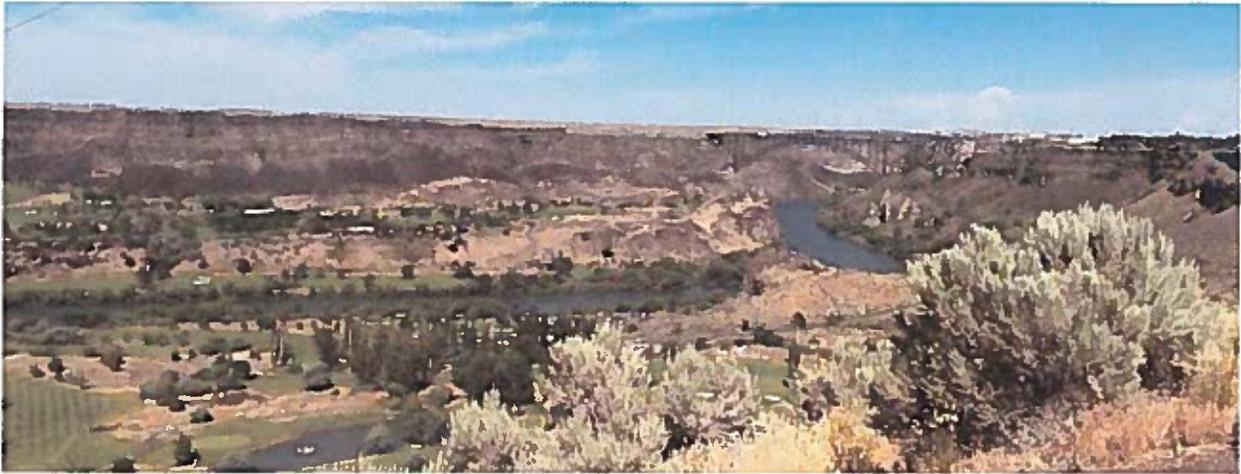
GROW WITH US



Comprehensive Plan Update



Land Use



Highlights

- At 24% of the overall land use, Medium-Density Residential is the City's most dominant future land use.
- Agriculture and Rural Residential are the dominant land uses outside the City limits yet within the Area of Impact.
- The City has grown rapidly in the last decade, primarily residents between the ages of 20 and 35 and those 55 and older.

Overview

The Future Land Use (FLU) map, on the following page, illustrates desired locations for land use. Clear future land use direction is one of the most critical functions of the Comprehensive Plan. Identifying the correct area and locations of land uses for the future is essential to a growing city.

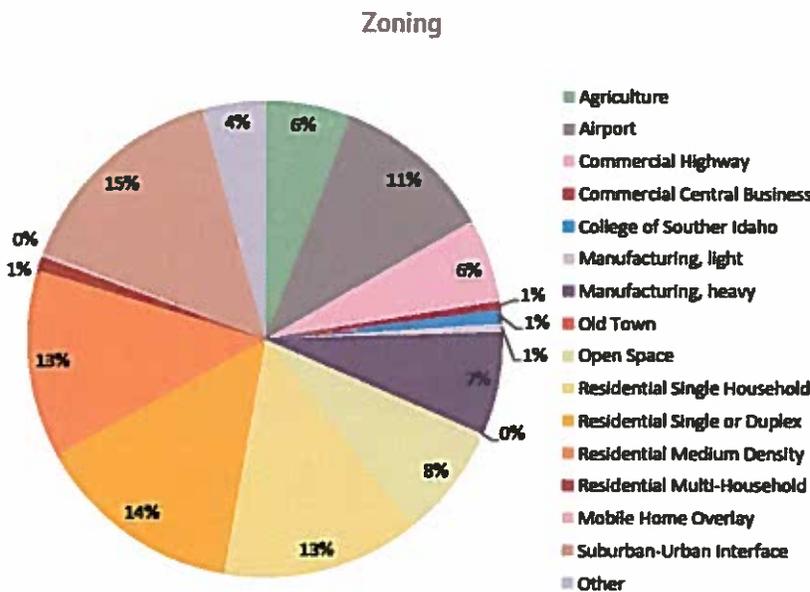
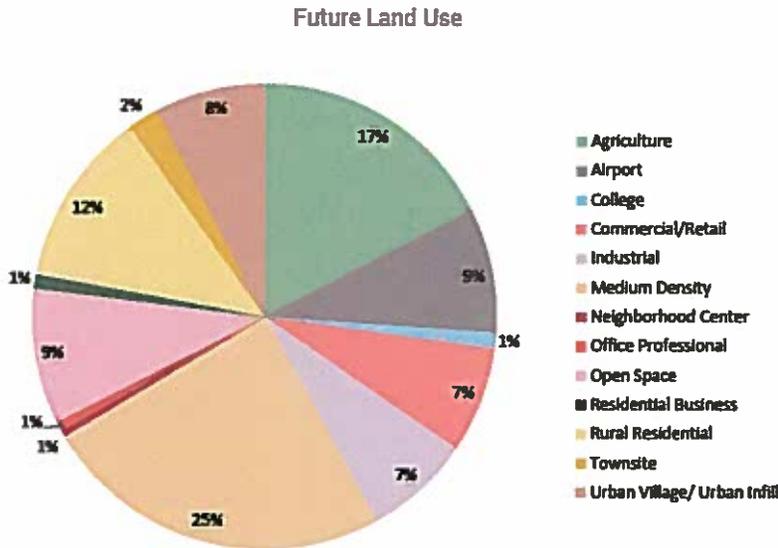
The City of Twin Falls Area of Impact is approximately square miles and the city limits cover close to 20 square miles. Combined, they cover roughly 47.5 square miles.

With growing concern about the availability of water for the growing population, the City has decided to use the water service boundary as the urban growth boundary. With 29 square miles, it extends roughly 9 square miles beyond the city limits.

Major land uses include Medium-Density Housing (24%) and Agriculture (17%, primarily located within the area of impact). Most of the area that is yet to be developed is Rural Residential and Medium-Density Residential with some Commercial/Retail and Industrial. See the percentage breakdown for all thirteen future land uses below.

Zoning is a regulatory tool that specifies the type of development and land uses allowable for individual properties. While the FLU anticipates the future desired development type, zoning reflects the existing entitlements of property.

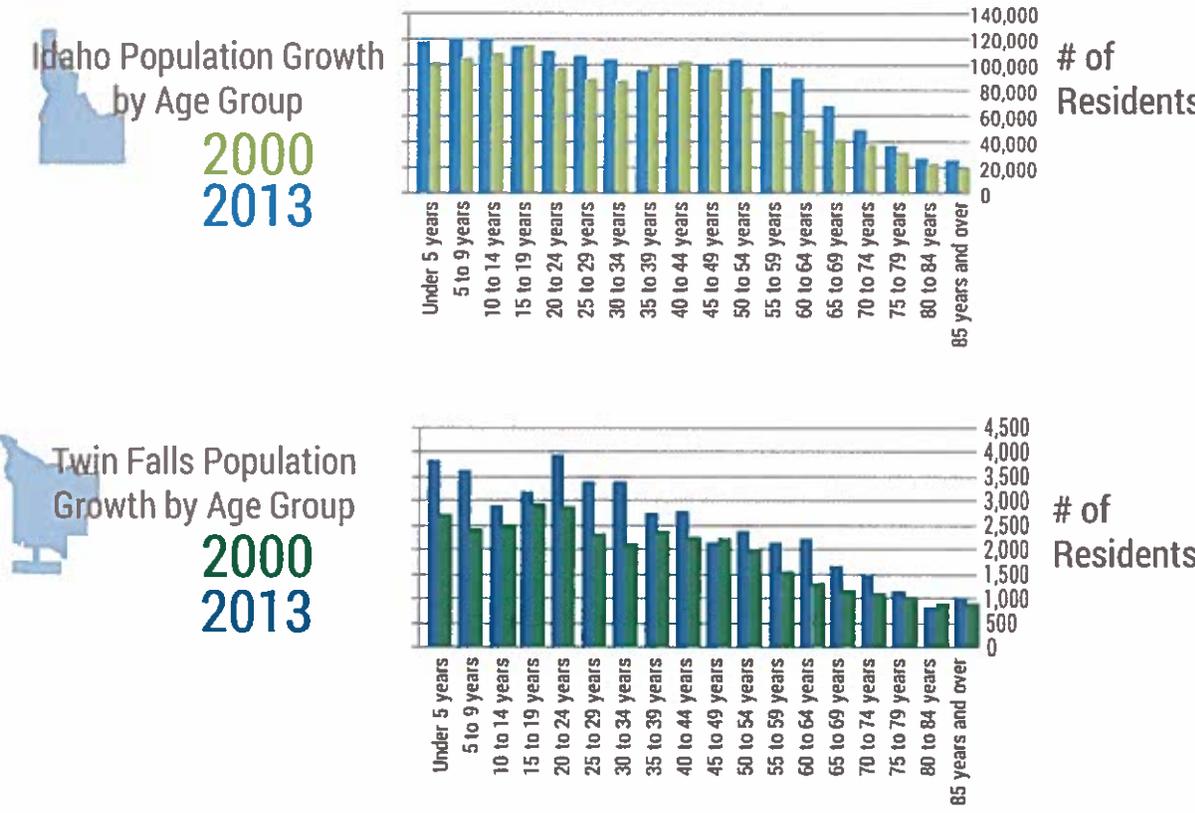
The primary zoning area is residential. Residential Single-Household, Residential Single or Duplex, Residential Medium-Density, Residential Multi-Household, and Mobile Home Overlay combined makes up roughly 42% of the total land area.



Since 2000, the population of Twin Falls has grown by 25%. Nearly a third of this increase consists of residents between the ages of 20 and 35 and almost a quarter of this increase is residents that are 55 and older.

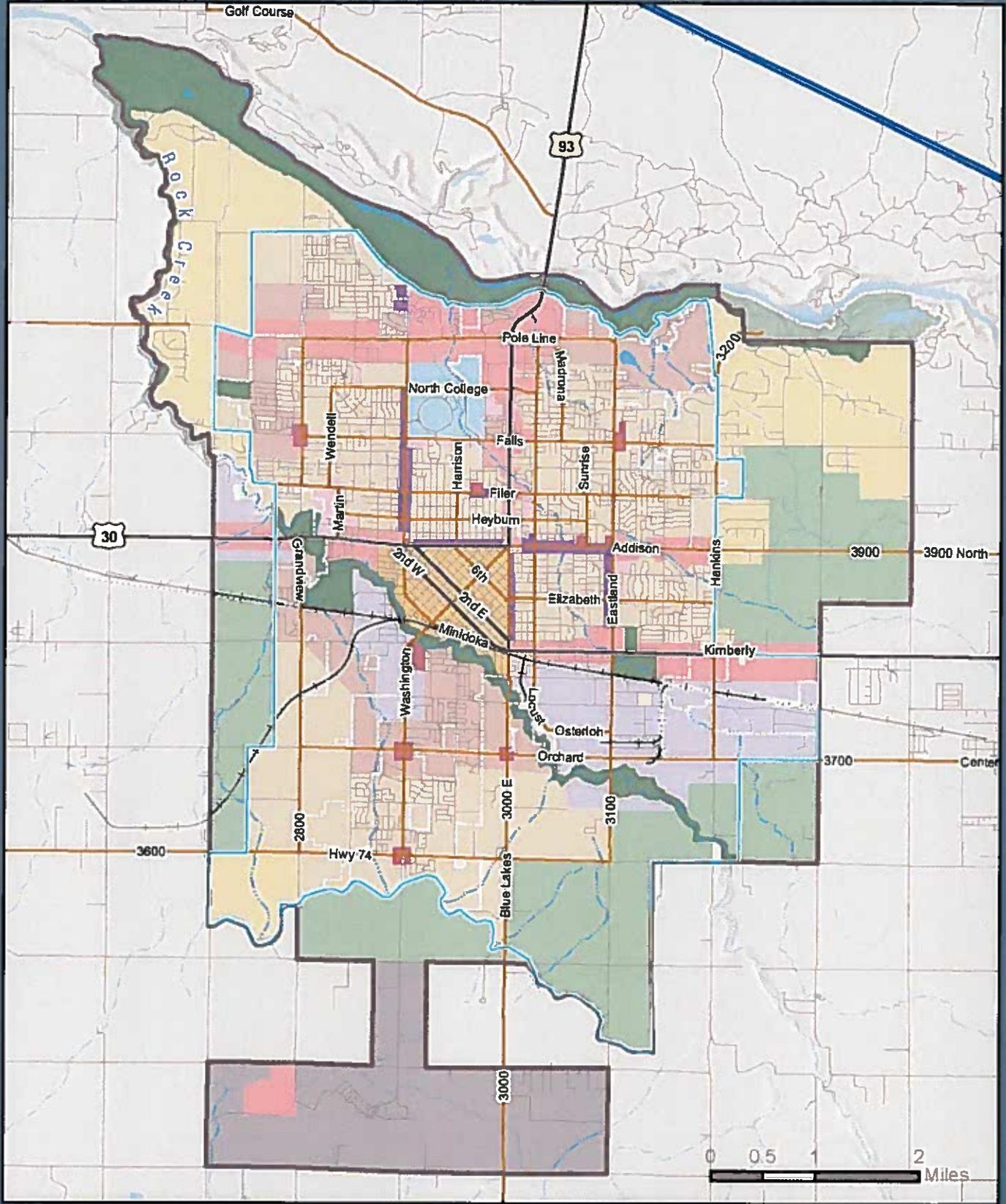
As people discover the thriving job market, family-oriented living conditions, and diverse recreation opportunities, the population of Twin Falls continues its rapid growth. As illustrated on the population map, the majority of the population density is centered north and east of Downtown, and around the College of Southern Idaho (CSI). However, the area south of the railroad along Washington Street is starting to increase in population density as well.

This draw of young families and retirees changes the population dynamic and demand for services. As shown in the graphic below, Idaho as a whole shows an upward shift in population between 2000 and 2013 between the ages of 0 to 14; 20 to 34; and a large upward shift between the ages of 50 and 70. Twin Falls shows a more dramatic shift within the same time frame for population ages 0 to 10; 20 to 34; and 50 to 69.



What We've Heard

- Beautify city entrances at east and west
- Manage growth and develop responsibly
- Support more mixed-use development
- Embrace creativity, innovation, and progressiveness with diversity and new ideas



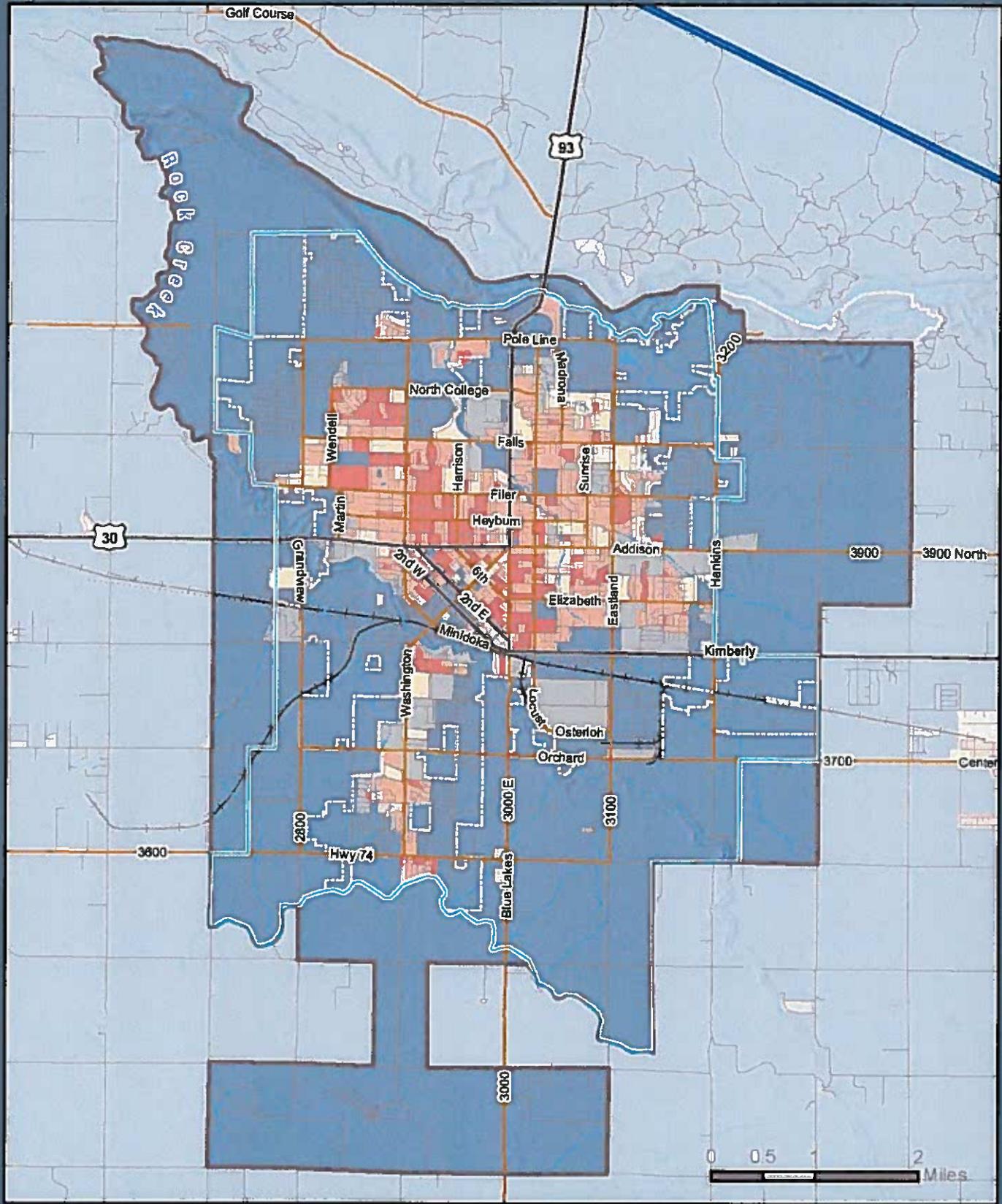
Boundaries

- Area of Impact
- City Limits
- Water Service Boundary

Future Land Use

- Open Space
- Agriculture
- Medium Density
- Rural Residential
- Urban Village/ Urban Infill
- Residential Business
- Neighborhood Center
- Commercial/Retail
- Office Professional
- Townsite
- Industrial
- College
- Airport





Boundaries

- Area of Impact
- City Limits
- Water Service Boundary

Transportation

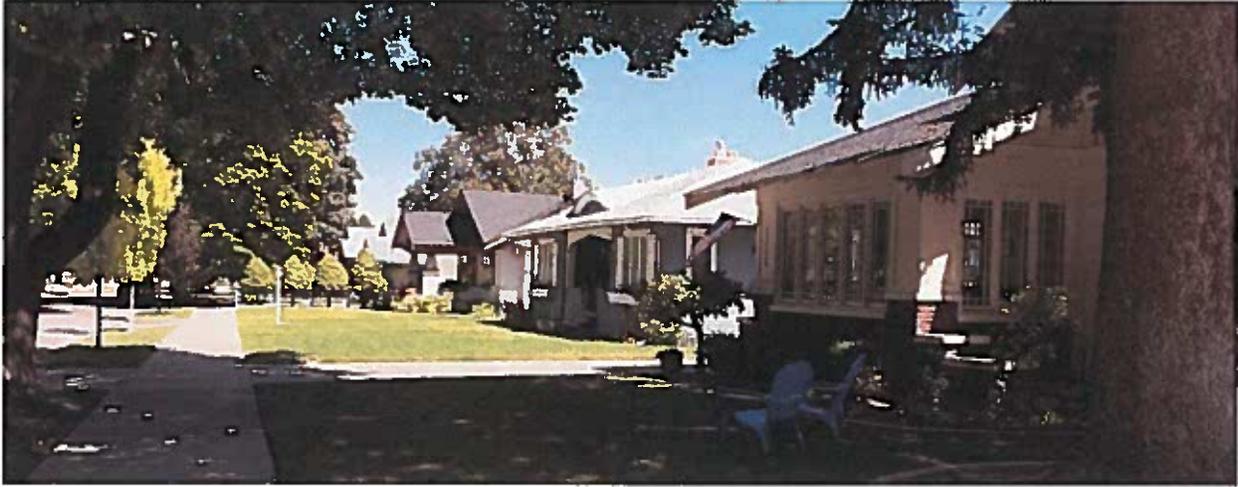
- Freeway
- Highways
- Major Roads
- Local Roads

Residents per Acre

- 0.0 - 1.0
- 1.1 - 2.5
- 2.6 - 5.0
- 5.1 - 10.0
- 10.1 - 20.0



3- Community Character



Highlights

- Downtown has seen a revitalization with the Main Street Improvements project, and the Orpheum Theater redevelopment
- Downtown and the Warehouse District have both seen an increase in redevelopment potential with Glanbia's Headquarters, and renovated warehouses into office space
- Many neighborhoods and buildings could now be considered for Historic Register designation
- The expanse of agricultural land at the city edge, and the boundary of the Snake river canyon are the most distinct natural features within Twin Falls

Overview

The main natural features that shape Twin Falls are the Snake River and Rock Creek. These provide scenery and provide two obvious boundaries within the City, along with the expanse of agricultural land at the City edge.

Downtown Twin Falls is attractive and comfortable due to its pedestrian scale, tree-lined streets, and architectural interest. As the population increases, Downtown should likely experience infill development and densification. Recent beautification and revitalizations efforts have and will improve the vitality of Downtown and the adjacent Warehouse District through repurposing and investment.

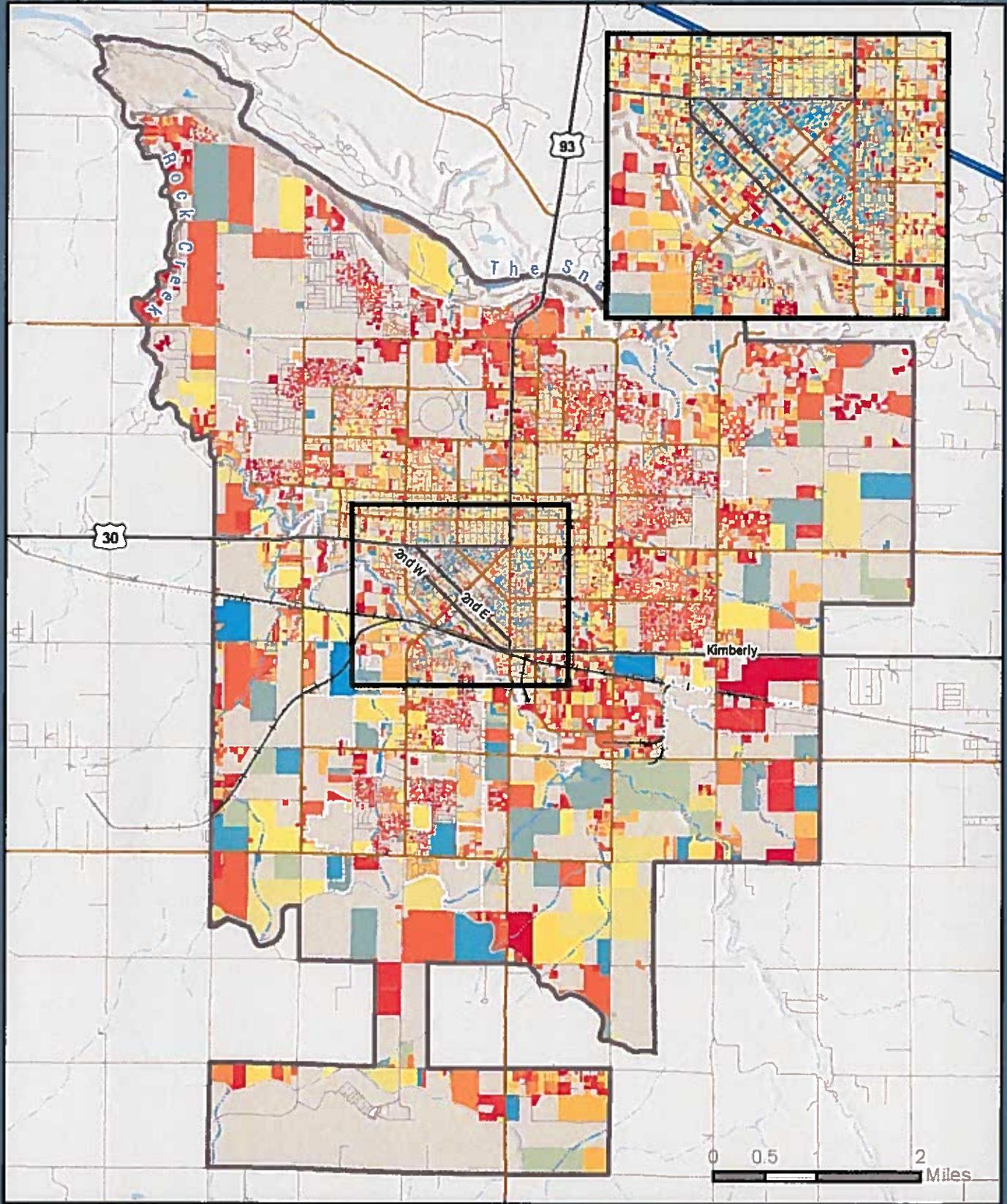
Historic neighborhoods surround Downtown, many built in the early 1900's and many with shady tree-lined streets and a diversity of housing character and size. Later neighborhoods surround these, and growth continued much in concentric circles expanding north over the past century. The majority of recent development has occurred in north Twin Falls up to the canyon rim, in small subdivisions to the south, and small pockets of redevelopment in and around Downtown.

Seven key concepts for improving community design and enhancing Twin Falls' sense of place, were identified in the last Comprehensive Plan, and include the following:

- Protect and Preserve the Canyon Rim Experience
- Improve the Sense of Arrival into the Community
- Improve the Circulation Experience along Primary Roads
- Enhance and Strengthen the “Sense of Place” within Individual Neighborhoods
- Protect and Preserve the Traditional Landscape at Rural Fringes
- Link the Canyon Rim and Downtown via Blue Lakes Boulevard
- Enhance of “Sense of Increasing Density” from Rural Fringe to Downtown Core

What We've Heard

- Maintain and encourage a vibrant historic downtown to draw tourism
- Identify opportunities for public art
- Update downtown zoning codes and districts
- Preserve older buildings
- Improve and increase maintenance in the older neighborhoods



Boundaries

-  Area of Impact
-  City Limits

Transportation

-  Freeway
-  Highways
-  Major Roads
-  Local Roads

Year Built



4 - Housing

Highlights

- Nearly all housing built over the past decade has been single-family
- Multifamily housing reached a peak in 2005 at 17% of the total units permitted
- Actual new home sales since 2005 totals 2,337 single-family homes
- Median sales price surpassed the pre-recession peak in 2013 and is currently around \$179,000
- Twin Falls is an affordable community. Median home prices are roughly four times the median household income.
- Twin Falls attracts more households with children than Boise or Pocatello, but not as many as Caldwell or Idaho Falls.
- The City of Twin Falls has 10 percent more renter occupied households than the state average.

Overview

Demographics

Population growth drives demand for new housing, and Twin Falls' population is growing quickly. According to the Census estimates, Idaho was the 13th fastest growing state from 2010 to 2014. Twin Falls County is the sixth fastest growing county in Idaho, increasing from 68,309 residents in 2004 to 80,914 in 2014, for an annual growth rate of 1.7 percent (Idaho Department of Labor). As shown in Table 1, the growth rate for Twin Falls County from 2010 to 2014 has outpaced the state and the national average.

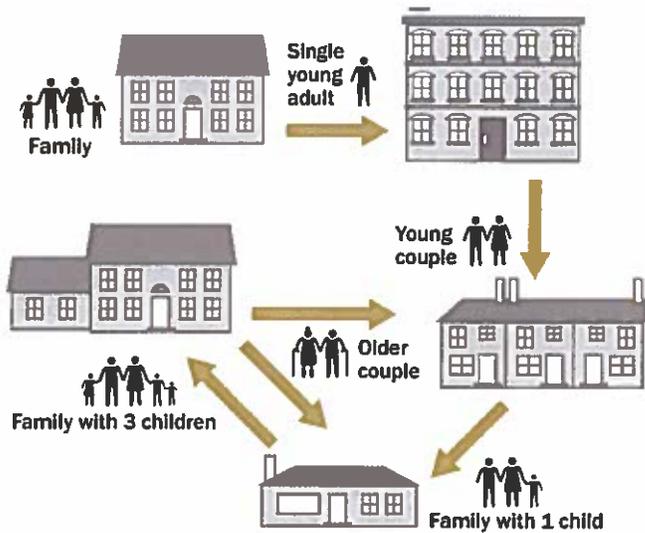
Table 1. Growth Rate Comparison, 2010 to 2014

Population	2010 Census	July 1, 2014 Estimate*	Change	Annual Growth Rate
US	308,745,538	318,857,056	10,111,518	0.8%
Idaho	1,567,582	1,634,464	66,882	1.0%
Magic Valley	185,790	190,496	4,706	0.6%
Twin Falls County	77,230	80,914	3,684	1.2%
Twin Falls City	44,125	45,981	1,856	1.4%

*The City of Twin Falls is based on a 2013 estimate, as the 2014 estimate is not yet available.
Source: US Census Bureau, Leland Consulting Group

Demographics drive housing choices throughout one's lifecycle. Ownership rates typically increase with age and income. Renters are more likely to choose multifamily housing, while the choice of single-family housing is closely aligned with income. Figure 1 shows other family choices throughout one's life cycle that will drive housing choices in the move-down and move-up markets.

Figure 1. Housing Life Cycle



The City of Twin Falls has a slightly smaller household size than the County, state, or Magic Valley.

Table 2. Household Summary, 2015

Household Summary 2015 Estimate unless otherwise noted	TF City	TF County	Magic Valley	Idaho
Households	17,559	30,369	70,406	611,035
Average Household Size	2.59	2.65	2.72	2.65

Source: ESRI, Leland Consulting Group

Figure 2. Households by Type, 2015 Estimate

	Twin Falls	Caldwell	Pocatello	Idaho Falls	Boise
Median Household Income	\$41,030	\$38,139	\$38,391	\$47,150	\$48,083
Median Home Value	\$168,225	\$122,955	\$166,815	\$167,188	\$208,487
Income to Home Value Ratio	4.1	3.2	4.3	3.5	4.3

Source: ESRI, Leland Consulting Group

Figure 3. Households by Type, 2015 Estimate

Source: ESRI, Leland Consulting Group

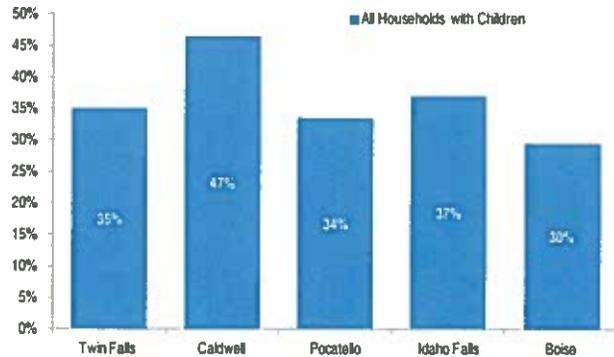


Figure 4. Population Growth Rate, 2015-2020 Estimate

Source: ESRI, Leland Consulting Group

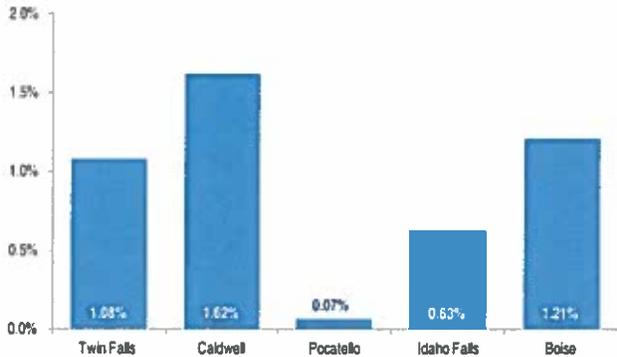


Figure 5. Households by Income, 2015 Estimate

Source: ESRI, Leland Consulting Group

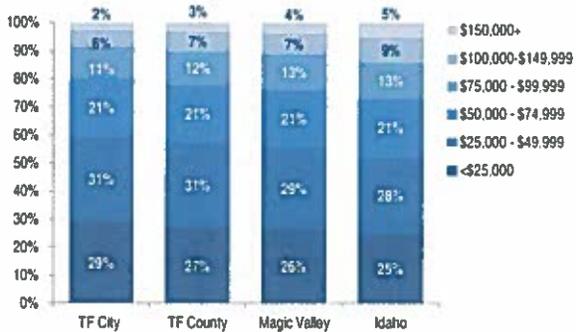


Figure 6. One and Two person HHs

Source: ESRI, Leland Consulting Group

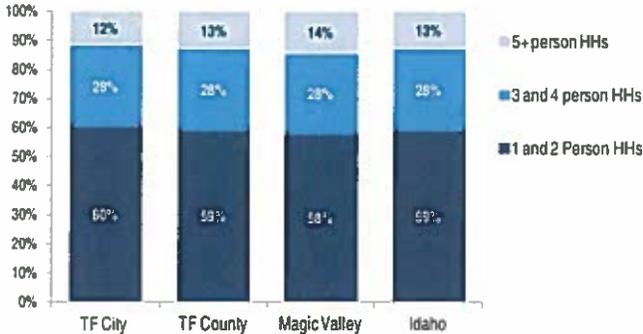


Figure 7. Renter and Owner Occupied Housing

Source: ESRI, Leland Consulting Group

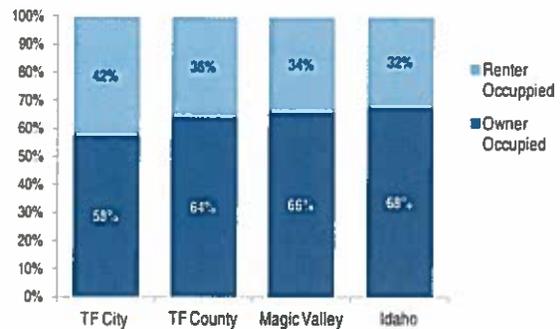


Figure 8. Population by Age

Source: ESRI, Leland Consulting Group

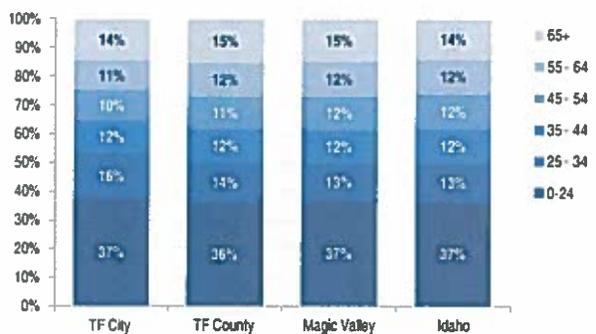
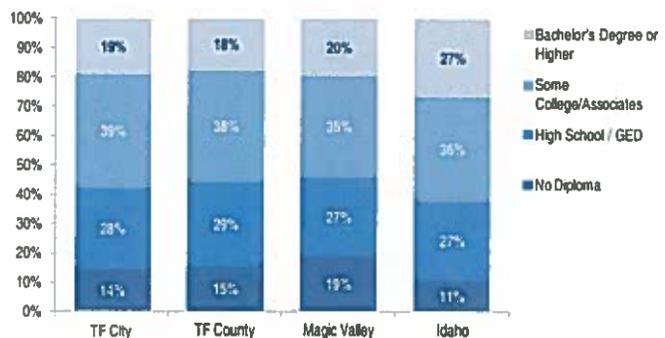


Figure 9. Educational Attainment

Source: ESRI, Leland Consulting Group



Aging Population

The population aged 65+ and older is expected to grow from 14.2 to 15.2 percent, or 851 residents. This is the fastest-changing age cohort in Twin Falls. The 45- to 54-year old cohort is expected to lose population as there are fewer people moving into that age bracket.

Table 3. Change in Population, 2015-2020

Change in Population by Age (2015-2020)	Twin Falls	
	#	%
0-24	612	-0.7%
25 - 34	455	0.1%
35 - 44	636	0.7%
45 - 54	(128)	-0.8%
55 - 64	173	-0.2%
65+	851	1.0%

Source: ESRI, Leland Consulting Group

Demographics are fundamental to real estate development. Demographics (residents’ age, marital and family status, incomes, household size) and “psychographics” (consumers’ preferences, values, and lifestyles) drive the types of goods and services they will purchase and places they will seek. Tapestry segments provide a way to categorize populations in a more intuitive way that goes beyond raw numbers. Three of Twin Falls’ demographic “tapestry segments” are described here.

Middleburg

23.5% of city population
4,000+ households

“Middleburg” is Twin Falls’ largest tapestry segment. This is a middle-income segment dominated by families who are raising children, working in white- and blue-collar jobs, and have traditional values; this is a population that people often identify closely with Twin Falls. It is important that the goods, services, and experiences that downtown offers appeal to this group; for example, downtown should provide dining and shopping options that are family-friendly and provide good value at a reasonable price. Middleburg residents may work downtown, but they are less likely to live within the blocks surrounding Main Avenue.

Bright Young Professionals

10.6% of city population
1,800 households

Twin Falls’ new and expanding employers, such as Glanbia, St. Lukes, and Chobani, are bringing additional young, well-educated professionals to the City. These new residents may be interested in downtown shops and entertainment like those they’ve experienced in other cities.

Old and Newcomers

8% of city population

These senior and young adult populations are of particular interest to downtown revitalization,

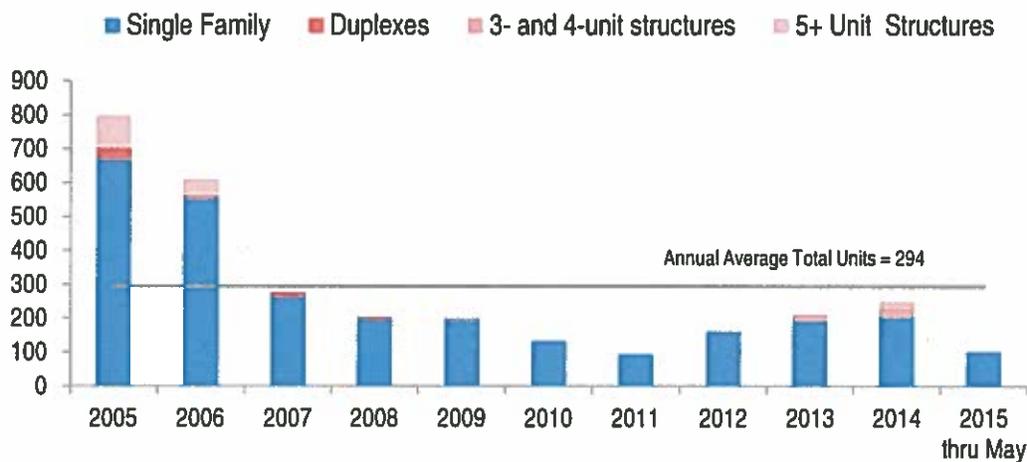
1,400 households

since young and “move-down” households—due to their smaller household size and interest in being close to shops, restaurants, and healthcare—are the most likely to live in or near downtown.

Existing Housing

Nearly all of the housing built over the last decade has been single-family. After the housing bubble burst and the subsequent recession, most communities experienced a surge in apartment construction due to demographic pressures and recession impacts, but not Twin Falls. Multifamily housing reached a peak in 2005 at 17 percent of the total units permitted. Very few apartments have been permitted since that time, although a few units were permitted in 2013 and 2014. Total housing permits have not exceeded the 10-year average since 2006, indicating that the housing market may not yet have recovered fully from the recession.

Figure 10. City of Twin Falls Housing Permits



Source: US Census, State of the Cities Data System, Leland Consulting Group

Building permits are an early indication of housing activity, although housing does not always get built in the same year, and some not at all. Actual new home sales since 2005 totals 2,337 single-family homes. The median sales price surpassed the pre-recession peak in 2013 and is currently around \$179,000, as shown in Table 4. The median lot size and median home size also increased after the recession. As in many communities, post-recession new homes have been targeted toward well-capitalized buyers that demand larger homes as financing requirements, low re-sale values, and worries about job security kept many buyers on the sidelines. 2015 appears to be moving back toward pre-recession norms.

Table 5 shows new home sales by quartiles, along with a representative image of the housing that would be found in that sales price range.

Figure 11 shows the location and price range of new home sales from 2010 to 2015. The higher priced new homes tend to be clustered around the canyon rim, while the lower priced new homes are mainly clustered south of downtown.

Table 4. New Single Family Home Sales, 2005 to 2015

New Single Family Home Sales				
Year Sold	# Sold	Median Sale Price	Median Home	Median Lot Size
2005	355	\$149,000	1,500	8,300
2006	438	\$169,000	1,500	8,000
2007	303	\$177,000	1,500	8,100
2008	197	\$165,000	1,600	8,400
2009	178	\$147,000	1,500	8,100
2010	139	\$139,000	1,500	8,000
2011	143	\$137,000	1,500	8,300
2012	146	\$163,000	1,700	9,200
2013	204	\$179,000	1,800	9,100
2014	169	\$204,000	1,800	9,900
2015	65	\$172,000	n/a	8,600
Total	2,337			

Source: Metrostudy, Leland Consulting Group

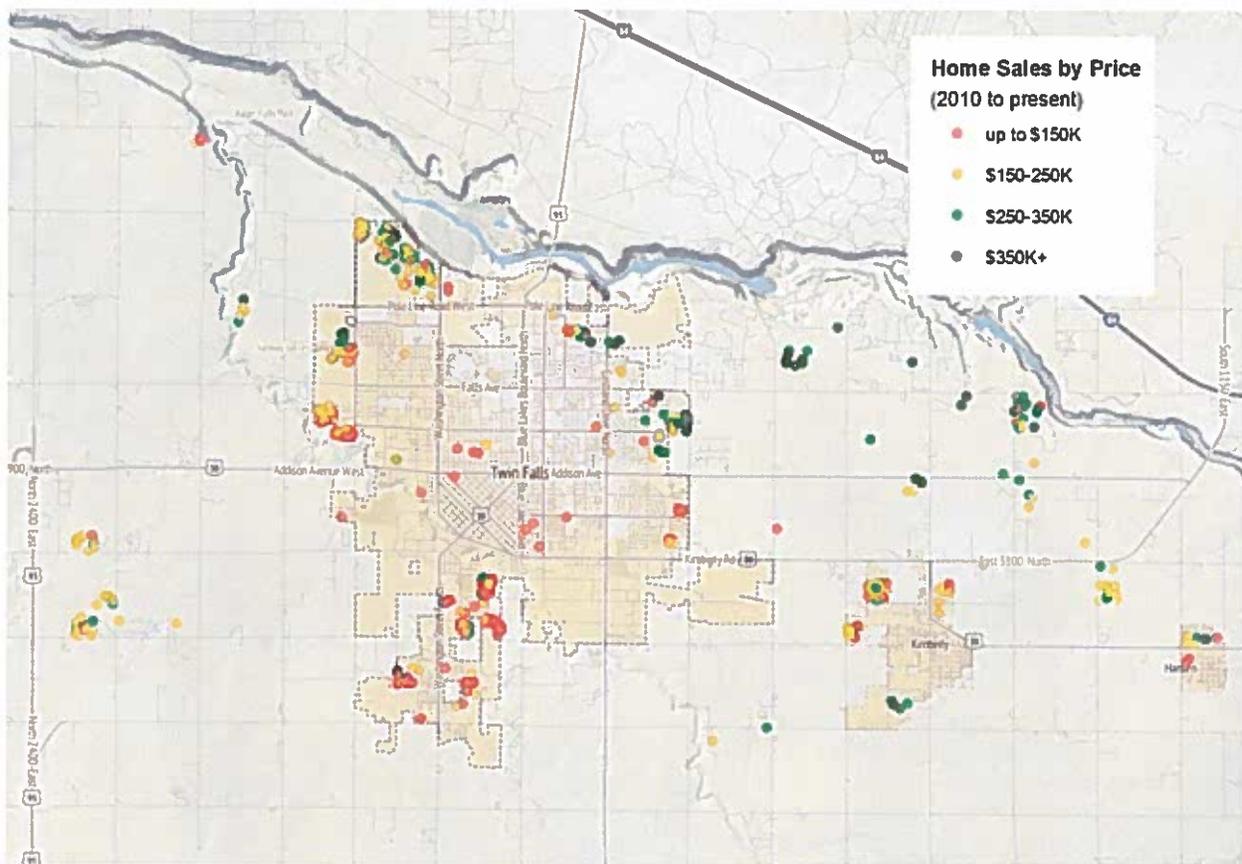
Table 5. New Single Family Home Sales, 2005 to 2015

	25th Percentile	Average (50th Percentile)	75th Percentile
Sales Price	\$139,000	\$170,000	\$225,000
Lot Size	6,900	8,400	10,400
Home Size	1,300	1,500	1,900



Source: Metrostudy, Leland Consulting Group

Figure 11. New Home Sales, 2010 to 2015



Source: Metrostudy, Leland Consulting Group

Housing Potential

There are several annual growth rates that could be used to project future growth for the City of Twin Falls. Table 6 shows three annual growth rates from different sources, as a way of starting the discussion. The household demand analysis in Table 7 uses the middle rate of 1.38 percent, based on Census estimates over the past three years.

Table 6. Growth Rate Comparison

Rate	Source
1.08%	ESRI 2015-2019
1.38%	Census Estimates, Twin Falls City, 2010 Census to July 1, 2013 Estimates
1.71%	Twin Falls County Historical Growth Rate (2004-2014)

Source: ESRI, Census, Idaho Department of Labor, Leland Consulting Group

Table 7 estimates the 10-year demand based on the projected new households by income bracket of the City of Twin Falls. Approximately 2,700 new housing units will be needed to meet the demand from new households over the next decade. Nearly 1,200 of them are likely to be rental units and a little over 1,500 ownership housing units.

The 2015 median new home price of around \$170,000 (shown in Table 4) would be affordable to those households in the upper end of the \$35,000 to \$50,000 annual household income range and beyond. The \$50,000 to \$75,000 range has the largest share of households (21 percent) in Twin Falls, followed by the \$35,000 to \$50,000 range. It seems that the sales prices of new homes are generally in line with the incomes of residents.

Table 7. Ten-year Household Demand, City of Twin Falls, 2015-2025

Annual Income Range (2015 dollars)	Approx. Rent Range	Approx. Home Price Range	Current HHs in Income Bracket	New HHs by Income Bracket	Trade Area Demand from New Households (10-yr)			
					Total Units	Est. Pct. Rental	Total Rental Units	Total Ownership Units
up to \$15K	up to \$375	up to \$75K	14%	13%	353	90%	318	35
\$15-25K	\$375 - \$625	\$75 to \$100K	15%	12%	315	75%	236	79
\$25-35K	\$625 - \$875	\$100 to \$150K	12%	11%	285	50%	142	142
\$35-50K	\$875 - \$1,000	\$150 to \$200K	18%	17%	459	40%	183	275
\$50-75K	\$1,000+	\$200 to \$250K	21%	23%	635	30%	191	445
\$75-100K	\$1,000+	\$250 to \$350K	11%	14%	366	20%	73	293
\$100-150K	\$1,000+	\$350 to \$500K	6%	8%	214	15%	32	182
\$150 -200K	\$1,000+	\$500K and up	1%	2%	46	10%	5	42
over \$200K	\$1,000+	\$500K and up	1%	2%	41	5%	2	39
Totals			100%	100%	2,714	44%	1,182	1,532

Note: May not sum correctly due to rounding

Source: ESRI, Leland Consulting Group

Table 8 estimates the 20-year new household demand, with approximately 5,800 new housing units needed to meet the demand from new households.

Table 8. 20-year Household Demand, City of Twin Falls, 2015-2035

Annual Income Range (2015 dollars)	Approx. Rent Range	Approx. Home Price Range	Current HHs in Income Bracket	New HHs by Income Bracket	Trade Area Demand from New Households (20-yr)			
					Total Units	Est. Pct. Rental	Total Rental Units	Total Ownership Units
up to \$15K	up to \$375	up to \$75K	14%	13%	758	90%	682	76
\$15-25K	\$375 - \$625	\$75 to \$100K	15%	12%	676	75%	507	169
\$25-35K	\$625 - \$875	\$100 to \$150K	12%	11%	612	50%	306	306
\$35-50K	\$875 - \$1,000	\$150 to \$200K	18%	17%	985	40%	394	591
\$50-75K	\$1,000+	\$200 to \$250K	21%	23%	1,364	30%	409	955
\$75-100K	\$1,000+	\$250 to \$350K	11%	14%	787	20%	157	629
\$100-150K	\$1,000+	\$350 to \$500K	6%	8%	460	15%	69	391
\$150 -200K	\$1,000+	\$500K and up	1%	2%	99	10%	10	89
over \$200K	\$1,000+	\$500K and up	1%	2%	87	5%	4	83
Totals			100%	100%	5,828	44%	2,539	3,289

Note: May not sum correctly due to rounding

Source: ESRI, Leland Consulting Group

Table 9 shows the net acreage needed to accommodate the new housing demand over the next 10 to 20 years. With current new homes averaging a lot size of around 9,000 square feet (as shown in Table 4), Twin Falls would be averaging five dwelling units per acre. At that rate, the City will need over 500 acres to meet the demand for new housing over the next decade. If more infill development occurs or more multifamily housing with a higher number of dwelling units per acre is built, then that number could be substantially lower.

Table 9. Net Acres Needed to Meet the Housing Demand

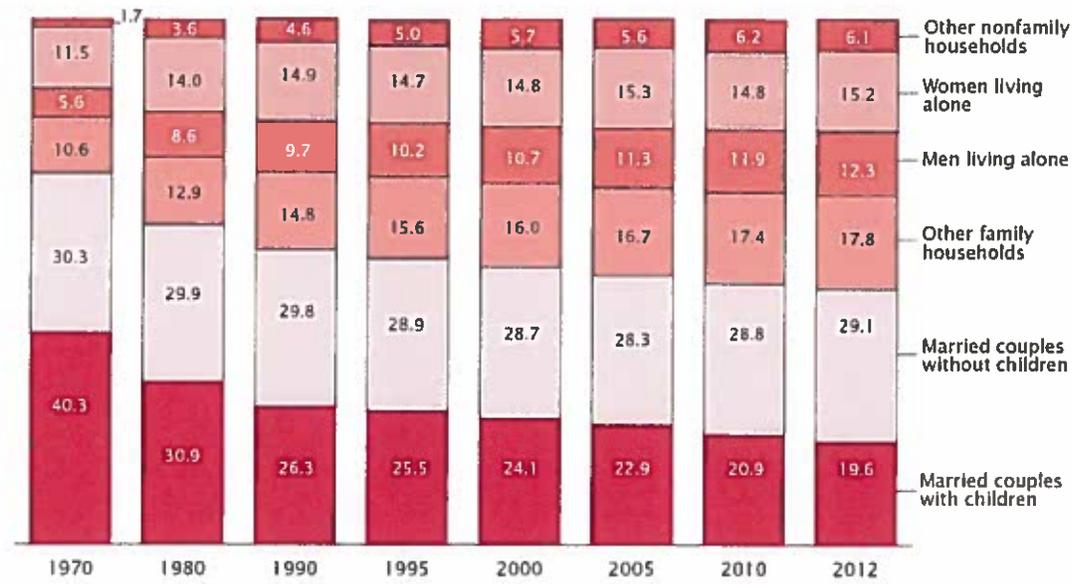
Acres Required Dwelling units per acre	10-year		20-year	
	Net New Housing units (10-year)	Acres needed	Net New Housing units (20-year)	Acres needed
5	2,714	543	5,828	1,166
10	2,714	271	5,828	583
15	2,714	181	5,828	389

Source: ESRI, Leland Consulting Group

Urban Housing Trends

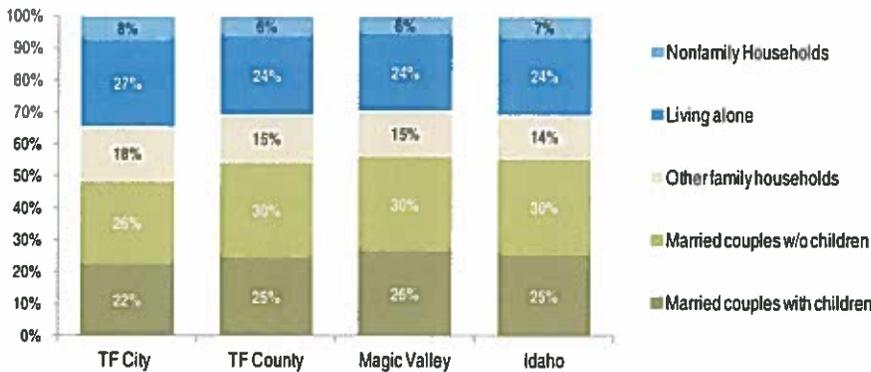
When thinking about population growth, there can be a tendency to assume that this growth will be driven by “traditional” family households that consist of a married couple with children. However, as Figure 12 shows, this type of household has been becoming less prevalent over time, while most other “non-traditional” household types have increased as a share of the population over time. The other household types tend to be smaller than families with children, and tend to be open to a wider variety of housing types. One writer has identified four demographic “S groups” that have seen the highest rate of growth in recent decades and are expected to continue growing in the coming decades: seniors, singles, single-parent households, and starter households (e.g., the married couples without children shown below, and unmarried couples). This national trend is fairly consistent with households in the City of Twin Falls and other market areas, as shown in Figure 13.

Figure 12. Households by Type as a Percent of All Households, United States, 1970 to 2012



Source: US Census Bureau

Figure 13. Households by Type as a Percent of All Households, 2015



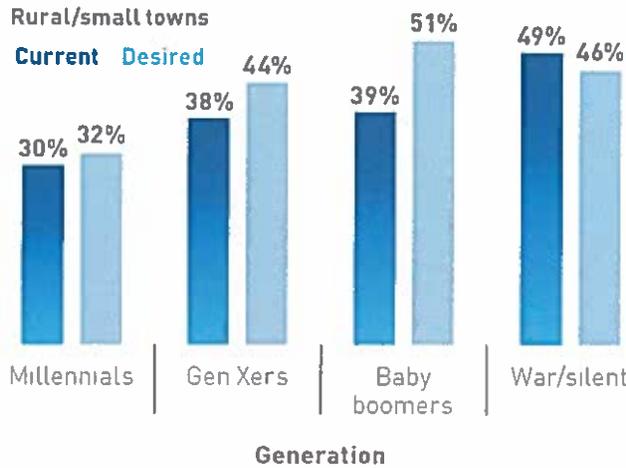
Source: ESRI, Leland Consulting Group

Recent trends have shown a desire to return to downtowns and Main Streets with a significant number of people wanting to live within walking distance of restaurants, shops, cultural events, and other amenities. According to an Urban Land Institute (ULI) survey and report on housing, transportation, and community, America in 2015, people are least likely to be satisfied with the range of housing to choose from, among a series of questions regarding community satisfaction. Low-income people in rural/small-towns report the highest level of dissatisfaction, with 26 percent unhappy with their community's range of housing options. In general, people are largely happy with their communities, quality of life, and size and quality of their homes.

The survey also asked people about their preference for living in an urban location, suburbs, or small towns. As shown in Figure 14, more people across all generations would prefer to live in rural communities or small towns than currently live in them. The opposite is true for people who live in urban areas, with more people currently living in urban areas than desire to live there. As shown in

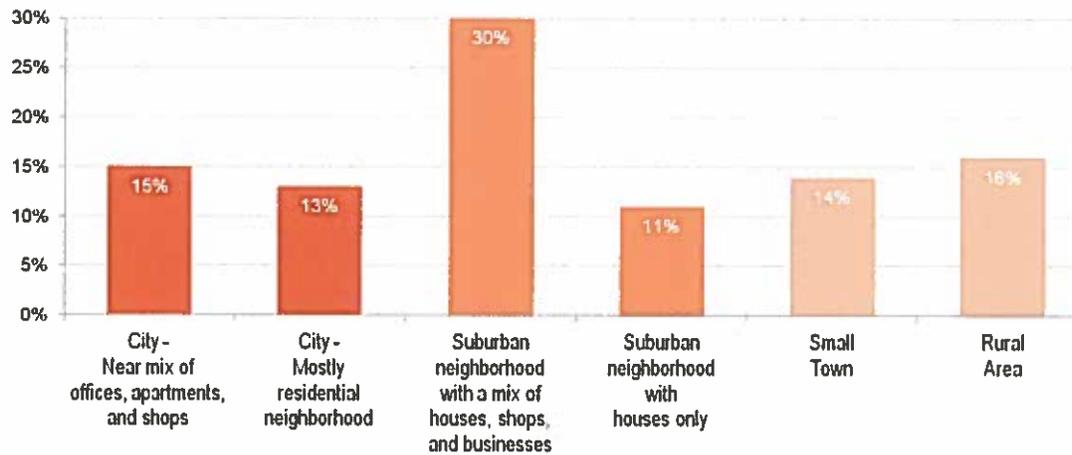
Figure 15, another survey shows that the greatest share of respondents would like to live in a suburban neighborhood with a mix of houses, shops, and businesses. Given the dichotomy of dissatisfaction with the range of housing choices and the desire to be in small towns or suburban neighborhoods, there is a great opportunity for small towns and rural communities to attract more residents by giving residents a broader range of housing choices that would meet their lifestyle throughout all stages of life.

Figure 14. If you could live anywhere, where would you live?



Source: ULI, America in 2015

Figure 15. In which of the following locations would you most like to live?



Source: National Community Preference Survey, National Association of Realtors, October 2013

Housing Typology

The desire for walkable neighborhoods, especially those in smaller towns, and the unique housing needs of increasingly diverse household types across the country is being met by a broad variety of housing types. The following is a brief overview of some of the housing types that might fit the size and scale of the City of Twin Falls and its close-in neighborhoods.

ACCESSORY DWELLING UNITS



Individual “mother-in-law apartment,” smaller than the main home, with separate entrance. Can be a converted garage or basement or a separate unit. Can accommodate young or aging family members or renters.

COTTAGE HOUSING



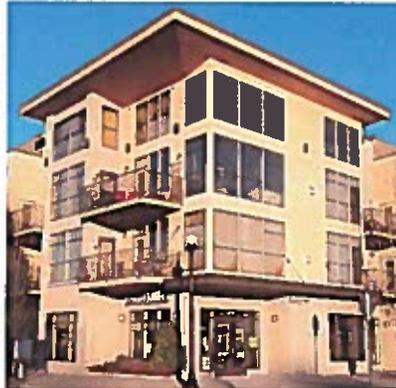
Smaller, single-family homes surrounding a common area. Parking is typically accommodated on-street or behind units. Popular with down-sizing households.

ROWHOUSE/TOWNHOME

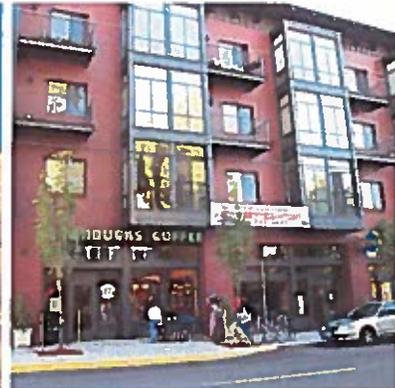


Individual housing units with separate entrances that share a side wall. Parking can be on-street, tuck-under, or surface parked.

MIXED-USE MID-RISE



Ground-floor retail or commercial space with apartments or condominiums above. Parking can be on-street, tuck-under, or surface parked.



What We've Heard

- Encourage more housing downtown
- Diversify housing architectural styles
- More high density housing

Services

6- Public Facilities



Highlights

- Twin Falls high school graduation rates are currently at 85.3%, aligned with the national average
- CSI has increase their enrollment by 25% over the last decade, now with 9,000 enrolled students
- Three new schools are currently under construction, and expected to be online in 2016 and 2017

Overview

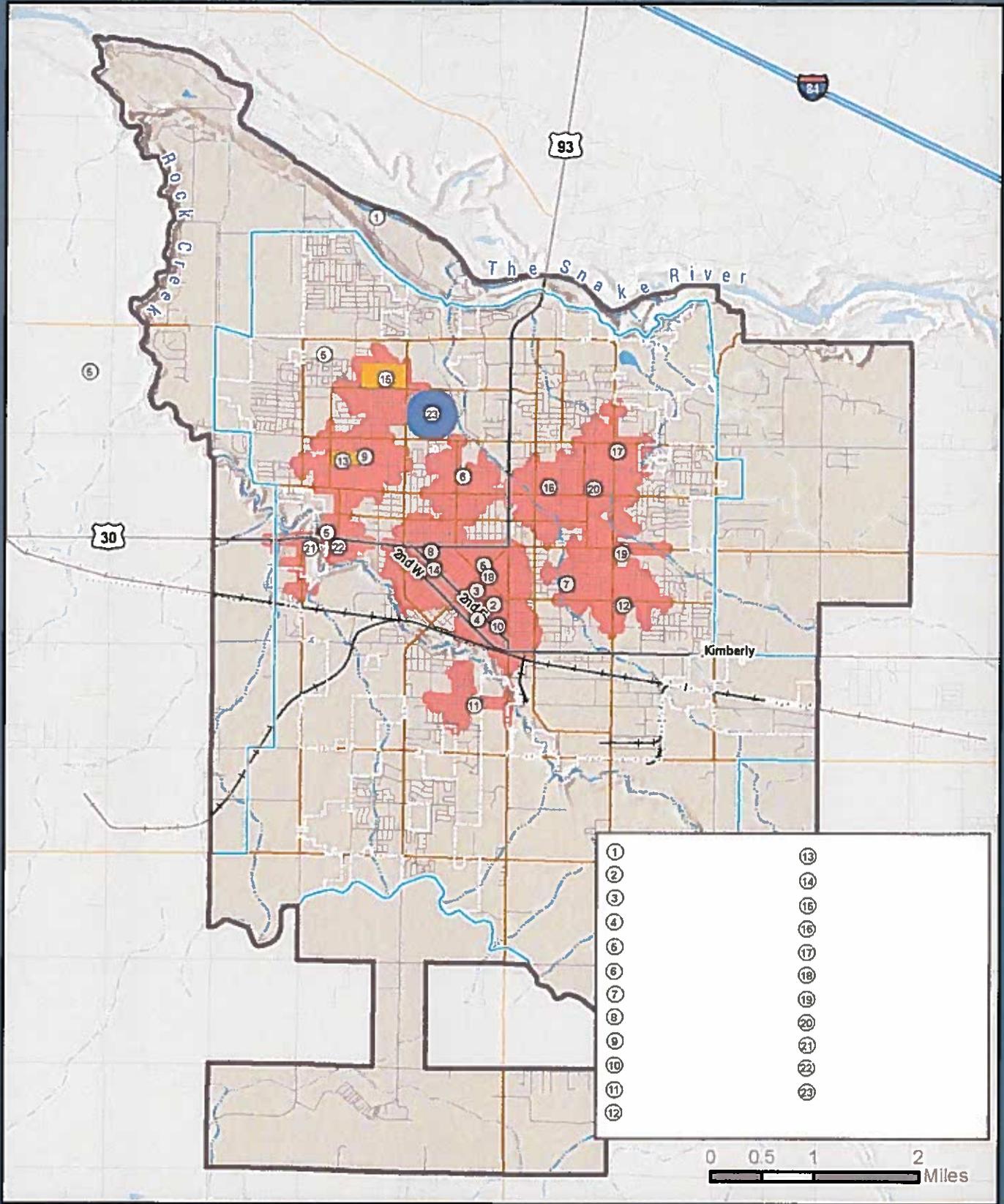
There are more than 7,700 students within the Twin Falls School District comprised of three high schools, two middle schools, and seven elementary schools. In addition, Twin Falls has several private schools, many of which combine elementary and middle schools or middle and high schools. Due to the expanding population, Twin Falls is building three new schools expected to begin classes in 2016 and 2017. The current schools are located within walking distance of 50% of the housing locations within the area of impact not counting the three schools under construction.

Twin Falls high schools have a graduation rate of 85.3% - nearly aligned with the national average of 86%. Schools offer a wide variety of sports programs, and offer extracurricular activities like performing arts and robotics competitions, and they take advantage of their outdoor setting providing school-related outdoor challenges.

The College of Southern Idaho (CSI) has increased their enrollment by 23% since 2002 and currently has about 9,000 students. They offer traditional AA and BA programs, professional-technical courses, health sciences, and alternative energy programs. For students who wish to attain both bachelors' and masters' degrees CSI works with Boise State University, the University of Idaho, and Idaho State University among others to provide baccalaureate programs. The Twin Falls School District and CSI collaborate to provide dual-credit courses and professional-technical training. CSI also collaborates with local employers, such as Glanbia Foods and Chobani, on employee training through customized courses.

What We've Heard

- Include parks in new areas, especially areas without schools nearby
- Start with a great educational foundation
- Add sidewalks near the high school
- Build a new City museum
- Complete the sidewalk network and increase frequency of snow removal
- Add free wi-fi Downtown to attract young people
- Need additional infrastructure



Boundaries

Area of Impact

City Limits

Water Service Boundary

Public Facilities

Schools

College of Southern Idaho

1/2 Mile Walk to Schools



7 - Economic Development

Highlights

- Food processing and manufacturing continues to be the core cluster in the South Central Idaho area.
- Dairy production continues to attract milk processors and cheese companies including Brewster Dairy, Glanbia Foods, Gossner Cheese, Commercial Creamer, Idaho Milk Products, Jerome Cheese, High Desert Milk, and Chobani Greek Yogurt.
- Recent completions include a \$250 million hospital in Twin Falls, a new Health Science Building at the College of Southern Idaho, the new Chobani yogurt plant and six hotels with a total of over 400 rooms.
- Twin Falls is a job center for the region, with just over 14,000 employees commuting to work in Twin Falls from elsewhere in the region.
- Besides registered nurses, the fastest growing occupations have median wages under \$13 an hour.
- Forty-three percent of the employees in Twin Falls live in the City. Others come from nearby cities and beyond.

Overview

There are many different definitions of economic development and different theories behind the success of different cities. What defines success for the future of Twin Falls is the subject of this 20-year comprehensive plan. This work will guide political and financial decisions over the short and long-term. The following discusses several different theories of urban prosperity that could be applicable to Twin Falls and embraced as the path to future success by capitalizing on existing strengths.

Twin Falls will succeed because¹:

- **Technology and Transport City.** It is at the hub of transportation and/or communication networks. Cities with superior infrastructure (ports, airports, railroads and highways) perform better than other cities.
- **Diversified City.** It will achieve better economic performance by diversifying its economy. “Economic diversification” is one of the most frequently used buzz phrases in economic development, and is associated with a more stable economy.
- **Cluster City.** It has an agglomeration of particular industries, especially related to food manufacturing. The interaction of related firms, workers, and institutions in urban environments makes businesses more successful and encourages growth.

¹ Adapted from: “City Success: Theories of Urban Prosperity, CEOs for Cities.” Joseph Conright.

- **Amenity City.** It provides social amenities such as schools, safety, entertainment, architecture, parks, and other characteristics that people value.
- **Business Climate.** It is an inexpensive and convenient place to do business with low taxes, affordable labor, abundant land, and few regulations.
- **Human Capital.** It attracts talented workers and further develops the talent of its labor force. Workers are more productive in cities than elsewhere.
- **Creative City.** It enables residents to be more innovative and creative, generating new art, new ideas, and innovations.
- **Government City.** It attracts investment or subsidies from the federal government.
- **Consumer City.** It provides a wide range of privately produced goods and services that consumers increasingly value, and will travel from far and wide to experience or purchase.
- **Green City.** It has a strong connection to local environment and enables residents to live a more sustainable and active lifestyle.
- **Distinctive City.** It has a distinctive identity and related set of attitudes that differentiates it from other cities. Local characteristics and behaviors that are “first, best, or only” in some way influence economic development.

Measures of Economic Development

There are many ways to measure economic development in order to assess a city’s progress over time. What to measure and track depends in large part on the community’s values, and what kind of city Twin Falls wants to be. The metrics should be tied to the big ideas and the values that make Twin Falls special. Some of the most common measurements that other cities have used include:

- Jobs
- Family wage jobs
- Per capita income
- Educational attainment
- Unemployment
- Poverty
- Workforce availability
- Increase in exports by state-based firms
- Investment in local/regional infrastructure
- Growth in the number of self-employed
- Increased research at major universities
- Increase in tourism/travel dollars spent
- New business formation

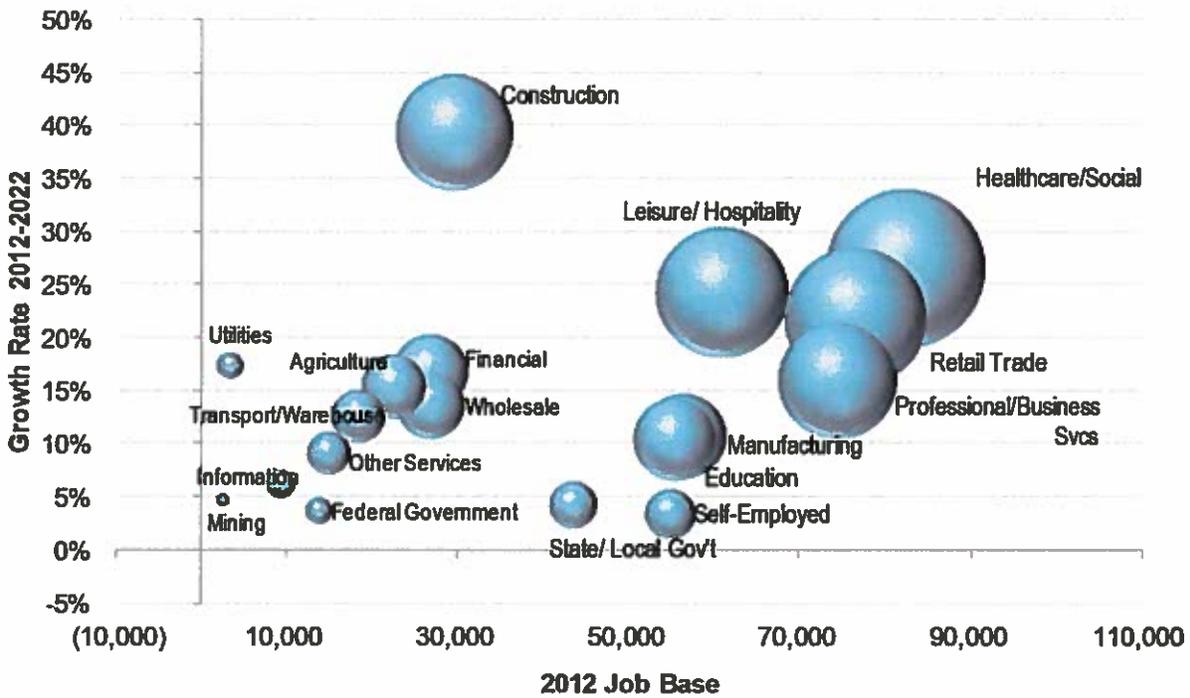
- Investment to new and existing businesses

Idaho

Idaho is a fast growing state, with overall employment projected to grow at an annualized rate of 1.5 percent from 2012 to 2022, according to the Idaho Department of Labor. This is faster than the projected national annual employment growth rate of 1 percent. Figure 16 shows the fastest growing employment sectors. The size of the bubble shows the relative size of the net new jobs by 2022. Construction is projected to grow the fastest, but Healthcare/Social Services is projected to have the greatest number of net new jobs, followed by Retail Trade and Leisure/Hospitality.

Manufacturing is a strong sector in financial terms; even though automation has reduced job growth, it has increased production and corporate financial health.

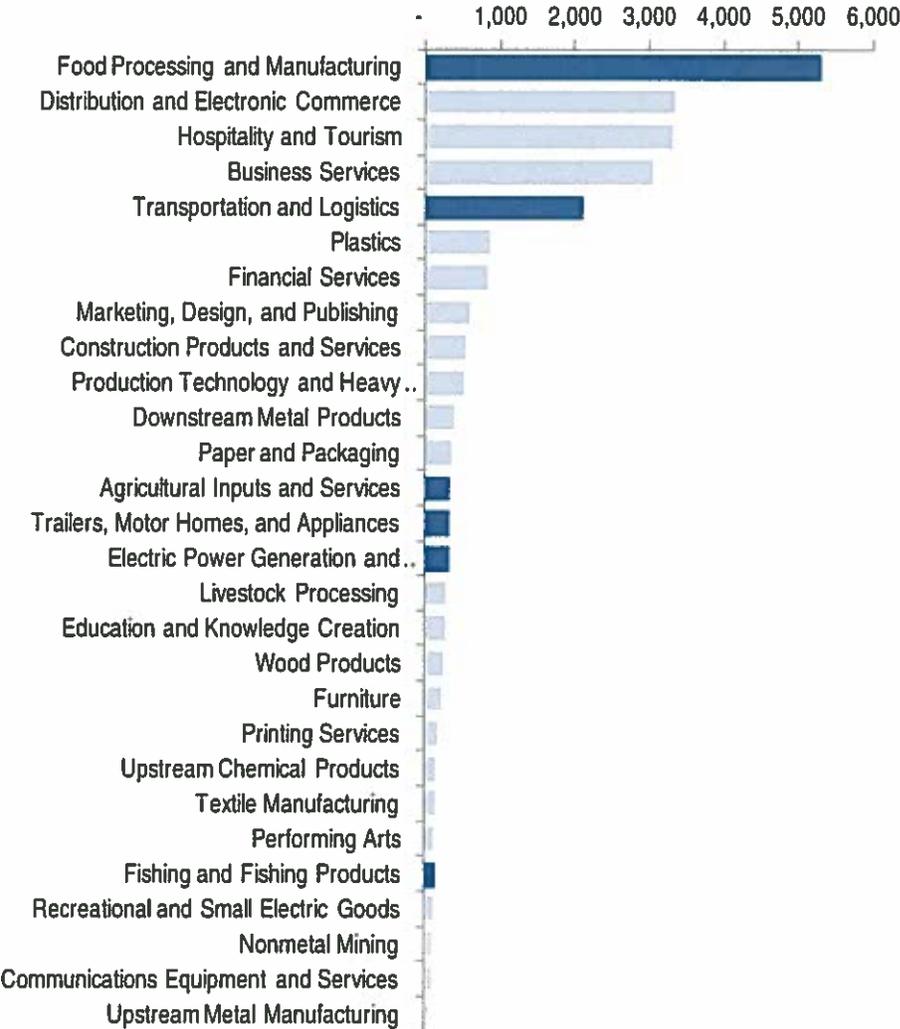
Figure 16. Projected Employment Growth by Industry Sector, Idaho 2012 to 2022



Source: Projections of Idaho Jobs by Industry and Occupation, 2012 to 2022, Idaho Department of Labor

As shown in Figure 17, food processing and manufacturing continues to be the core cluster in the South Central Idaho area and was strong throughout the recession. Dairy production continues to attract milk processors and cheese companies including Brewster Dairy, Glanbia Foods, Gossner Cheese, Commercial Creamer, Idaho Milk Products, Jerome Cheese, High Desert Milk and the newest addition of Chobani Greek Yogurt which located in Twin Falls. Other food processing subcategories that are strong in Twin Falls include packaged fruit and vegetables, milling and refining of sugar, and farm wholesalers, as shown in Figure 18.

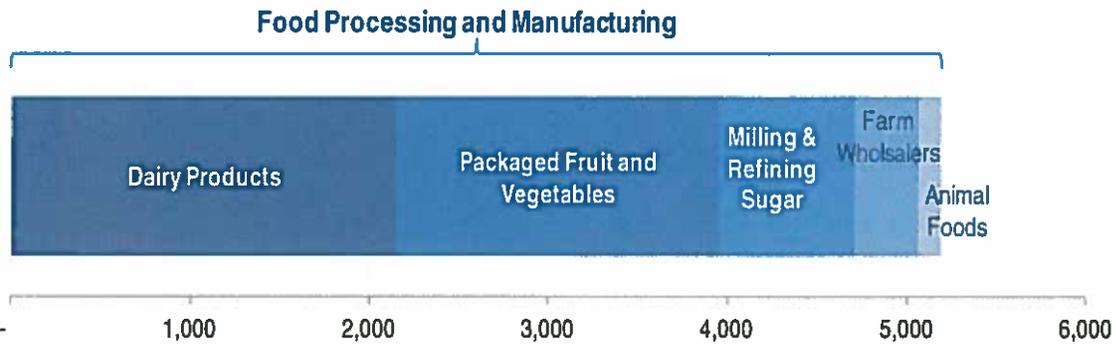
Figure 17. Clusters in the Twin Falls Economic Area, 2013



*Note: Strong Clusters, defined by those having a high employment specialization in the region, are shown in dark blue.
Source: ClusterMapping*

Clusters are important to economic regions because those industries tend to experience higher growth in new business formation, start-ups, and other innovation. Firms can share knowledge, experienced employees, suppliers, and other drivers of success.

Figure 18. Food Processing and Manufacturing, 2013

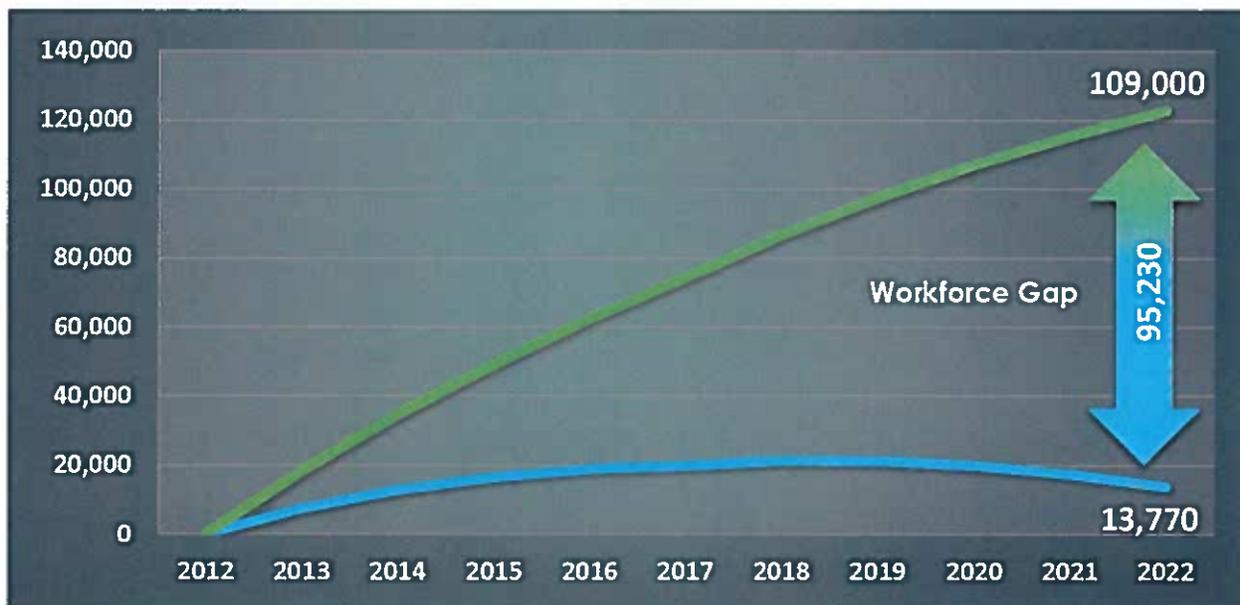


Source: ClusterMapping

New construction projects include a CSI building, apartment complex, a clinic in Kimberly, health care provider offices, Clif Bar’s new plants, and Glanbia’s corporate headquarters and cheese innovation center. Recent completions include a \$250 million hospital in Twin Falls, a new Health Science Building at the College of Southern Idaho, the new Chobani yogurt plant and six hotels with a total of over 400 rooms.²

Idaho is expected to have a major workforce gap over the next decade. Figure 19 and Figure 20 show that as employment opportunities continue to grow, older workers retire, and fewer people of workforce age (15 to 64) are available to fill the gap there will be a labor shortage of roughly 95,000 workers by 2022.

Figure 19. Idaho’s Supply of Labor: Jobs and Workforce Growth



Source: Projections of Idaho Jobs by Industry and Occupation, 2012 to 2022, Idaho Department of Labor

² South Central Idaho Workforce Trends, May 2015, Idaho Department of Labor.

Figure 20. Population Growth



Source: Projections of Idaho Jobs by Industry and Occupation, 2012 to 2022, Idaho Department of Labor

Figure 21 shows the fastest growing occupations in the state, based on net job growth, along with 2013 median wages. Besides registered nurses, the fastest growing occupations have median wages that are less than \$13 an hour. Given the projected shortage of labor, it may be hard to fill lower paying positions over the next decade, as employees will be in demand and educated workers will have a variety of jobs to choose from.

Figure 21. Fastest Growing Occupations (by annual job openings)

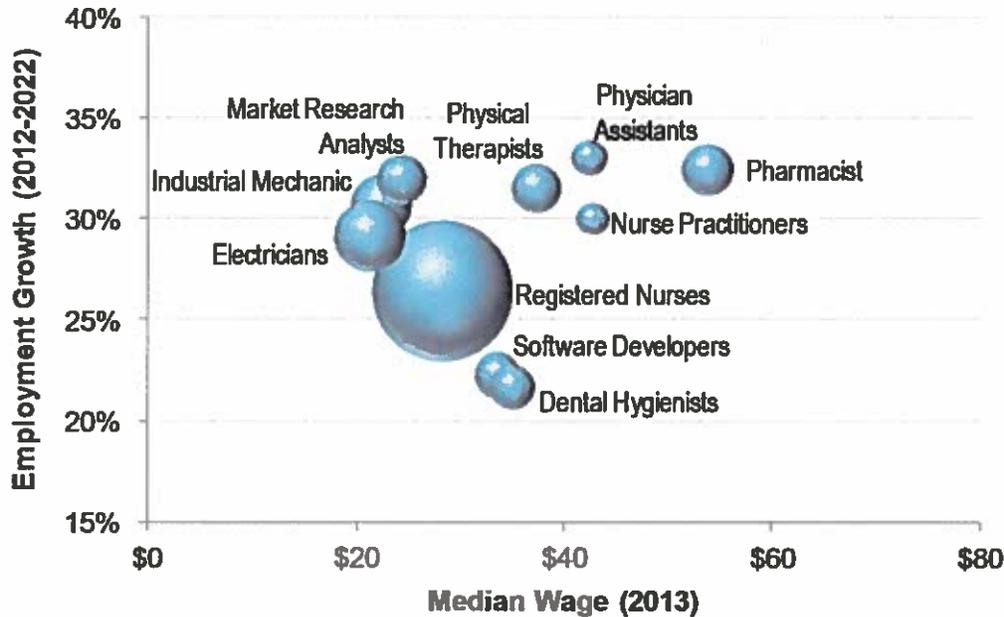


Note: Median wages as of 2013. Annual job openings include new jobs plus replacement jobs.

Source: Projections of Idaho Jobs by Industry and Occupation, 2012 to 2022, Idaho Department of Labor

Figure 22 shows Idaho’s “hot jobs” - those that are growing fast, have a high median wage, and of which there are an abundance in the economy. The size of the bubble shows the relative number of annual openings for each occupation. Nearly all of the hot jobs are in healthcare; others include: Software Developers, Industrial Machinery Mechanics, Electricians, Dental Hygienists, and Market Research Analysis and Marketing Specialists.

Figure 22. Idaho’s “Hot Jobs”



Hot Jobs: Jobs that on average rank high in three major criteria--the abundance of jobs in the economy, jobs that are growing the fastest, and jobs with the highest pay. Annual openings include new jobs plus replacement jobs.

Source: Projections of Idaho Jobs by Industry and Occupation, 2012 to 2022, Idaho Department of Labor

City of Twin Falls

Twin Falls is a job center for the region. As shown in Figure 23, more employees commute into Twin Falls to work than leave for other places. Nearly 18,000 employed residents live in Twin Falls, with over 10,500 of them both living and working in Twin Falls.

Figure 23. City of Twin Falls Employment Inflow and Outflow, 2012



Employment Inflow/Outflow	2012
Total Employment in Twin Falls	24,546
Living in Twin Falls	17,910
Living and Employed in Twin Falls	10,519
Living in Twin Falls but Employed Elsewhere	7,391
Employed in Twin Falls but Living Elsewhere	14,027

Source: Source: US Census LED OntheMap, Leland Consulting Group

Figure 24. City of Twin Falls Employees Place of Residence, 2012

Twin Falls Employment, 2012		
	Count	Share
Total All Jobs	24,546	100%
Twin Falls	10,519	43%
Jerome	902	4%
Boise City	614	3%
Kimberly	503	2%
Nampa	478	2%
Filer	391	2%
Buhl	350	1%
Burley	300	1%
Pocatello	277	1%
Idaho Falls	238	1%
All Other Locations	9,974	41%

Employment in Twin Falls is quite diverse. The top three largest employment sectors (health care, retail trade, and leisure and hospitality) are also three of the State’s projected top employment growth sectors by net new jobs. Employment in the professional services sector is expected to increase as a total of statewide employment, but is not represented as much in Twin Falls.

What We've Heard

- Downtown businesses must take pride in keeping up own properties!
- Promote local business
- More diversity of businesses
- More restaurants
- Retail anchor downtown

9- Transportation



Highlights

- 19 miles of existing bike routes
- 3 miles of proposed bike routes
- Magic Valley Airport provides three flights daily to Salt Lake City
- At completion, the Canyon Rim Trail will extend over 5 miles

Overview

Downtown Twin Falls is defined by the boundary of the highly connected grid network. As seen in the average daily trips highlighted in the transportation map, the majority of the traffic is focused on Highways 30 and 93 across the middle of Twin Falls and up across the Snake River to I-84. Very little traffic passes through the southern part of the City.

The primary goals of the transportation system are:

1. Clear and efficient connectivity of transportation facilities.
2. Develop and implement appropriate design and operation standards.
3. Provide sufficient roadway capacity to meet current and future needs.

Twin Falls is a major thoroughfare for interstate truck traffic. According to the Twin Falls Transportation Plan, 11% of the traffic on Highway 93 is large trucks transporting goods. Currently the only truck routes in Twin Falls are its state highways.

Alternative Transportation + Public Transit

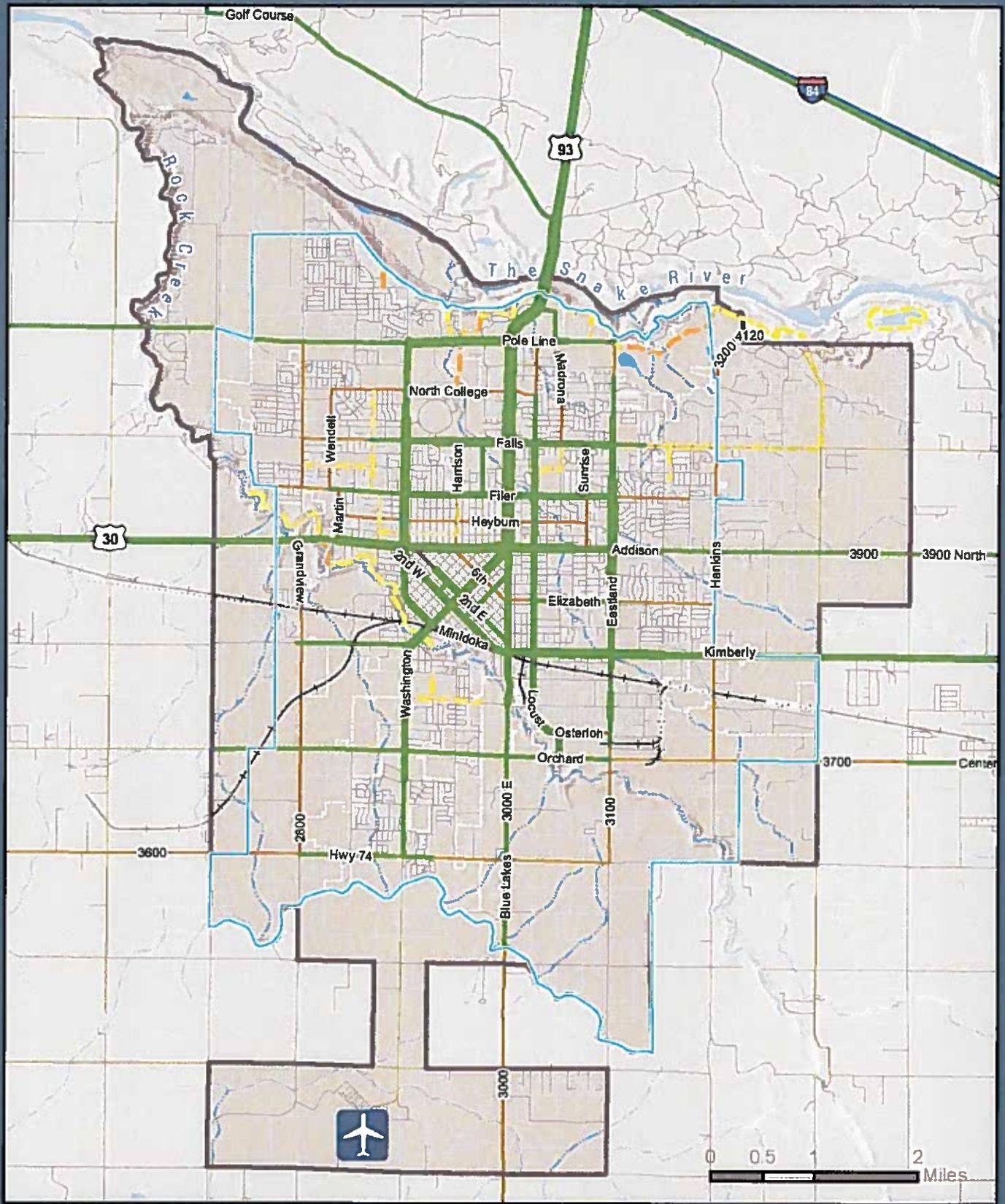
There are currently 19 miles of existing bike routes and 3 miles of proposed bike routes that follow the canyon rim trail and connect to the street network in town to facilitate both commuting and recreation. There are plans to expand the current bike network as part of the 2030 Strategic Plan. The updated bicycle facilities map was created using citizen input regarding their thoughts and their current cycling habits to gauge future demand and connections.

Current public transportation in Twin Falls is the Trans IV Shuttle Bus, which provides a variety of services including Dial-A-Ride. Their routes and schedules are flexible and change seasonally. This service is available to anyone, but is especially important to students, elderly, commuters, and disabled.

Other services available are the Magic Valley Ride Share, providing a carpool program, Rocky Mountain Trailways which provides services to Salt Lake City, and Greyhound bus service that offers connections from Twin Falls to Boise, Pocatello, and Salt Lake City.

What We've Heard

- Add additional north/south routes aside from Blue Lakes Boulevard
- Expand the main arterials
- Add medians for traffic control and aesthetic improvements
- Improve maintenance and curb and gutters within older neighborhoods
- Institute additional traffic control measures
- Investigate a loop truck route
- Expand airport services and routes



Boundaries

- Area of Impact
- City Limits
- Water Service Boundary

Paths & Features

- Bike Path
- Potential Bike Path
- Magic Valley Airport

Transportation

- Freeway
- Highways
- Major Roads
- Local Roads

Average Annual Daily Auto Trips

- 10 - 2,000
- 2,000 - 5,000
- 5,000 - 10,000
- 10,000 - 20,000
- 20,000 - 40,000
- 40,000 - 80,000
- 80,000 - 100,000+

