



*Flagstaff
Regional Plan 2030*

2020
ANNUAL
REPORT

NATURAL
ENVIRONMENT,
BUILT
ENVIRONMENT, &
HUMAN
ENVIRONMENT

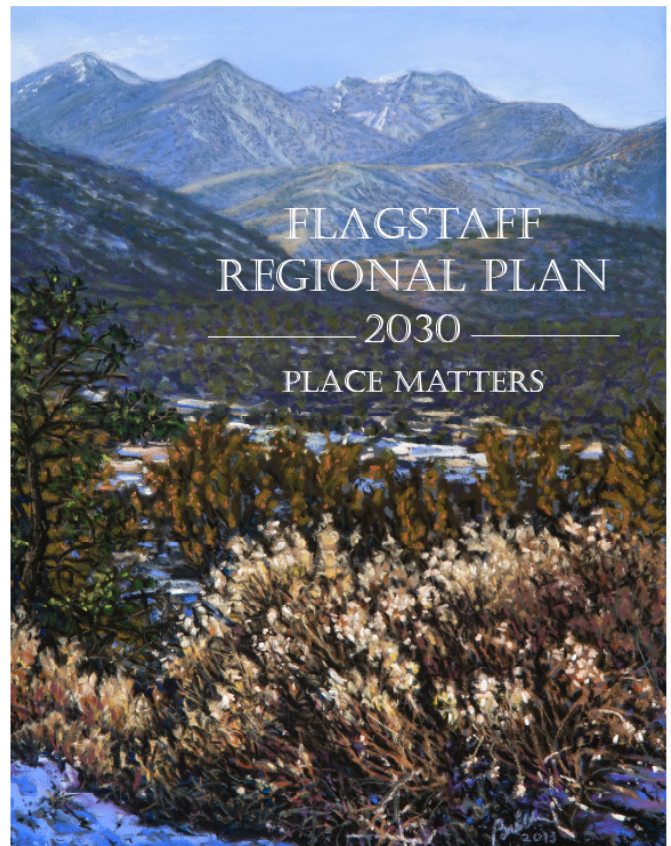
INTRODUCTION

The *Flagstaff Regional Plan 2030 (FRP30)* is used for decision making so that Flagstaff City government is accountable for publicly-derived policy outcomes and goals. It provides the basis for policies and regulations to guide physical and economic development within the Flagstaff region. The Plan is used as a guide, or road map, for the future of the City and the region. It establishes priorities for public decisions and direction for complementary private decisions, thereby striving to establish predictability in the decision-making process.

The Annual Report consolidates metrics identified in Appendix D of the *FRP30* into a summary of the City's performance towards the Plan's goals, and an account of progress in Plan-related work. While all the goals and policies in the Plan are directed to future needs and accomplishments, it is important to understand that many of them also reflect ongoing programs, initiatives, and actions already implemented by City, County, and other policy and decision makers. Progress towards the goals and policies in the Plan will be dependent on the community's ability or inability to fund the recommended actions, the policy decisions made by City Council and management, and the community support of the Plan.

This report is the seventh produced since the Plan was adopted. Not all metrics are available on an annual basis. Gradual trends may be difficult to observe. The report has a column to highlight the overall, six-year trends emerging so far. City staff strives to establish consistent methods of gathering the relevant data, even as policies and accounting systems may change. The report will note when a policy or management change has resulted in a change to the measurement, as opposed to a change that is the result of Plan implementation. If a date appears in parentheses after a measurement, it signifies that data from a different year was used. For instance, some data used in the 2014 report was based on data between 2011-2014, because of the timing and availability of data.

The Report is organized into metrics for the Natural, Built, and Human Environments. It also reports on the use of the goals in City Council decision making, Regional Plan accomplishments, and future projects to implement the Plan.



This page intentionally left blank

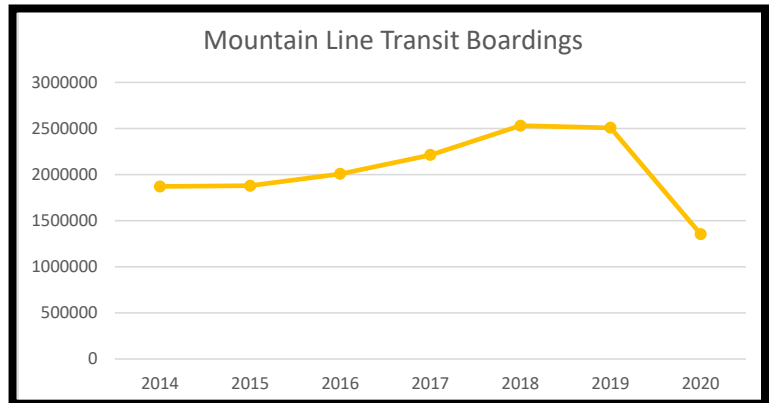
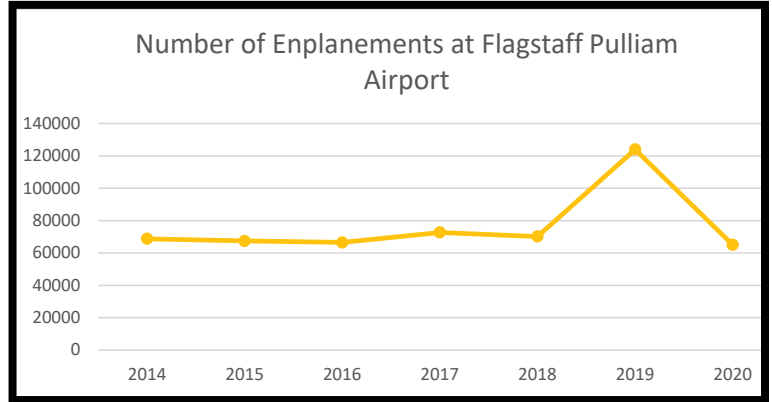
Key Insights

COVID-19 PANDEMIC

In March of 2020, in response to increasing positive COVID-19 cases, the federal government declared a COVID-19 National Emergency. Following this declaration, the Mayor of Flagstaff issued a proclamation closing certain businesses and establishments to the public. The Governor of Arizona also issued a stay-at-home order in March 2020 requiring non-essential workers to remain at home except for essential trips. The COVID-19 pandemic and accompanying restrictions impacted communities across the country in unprecedented ways, some expected and some unexpected. In Flagstaff, the pandemic resulted in schools - including K-12 and college level - transitioning to online learning and local businesses transitioning to online and curbside sales.

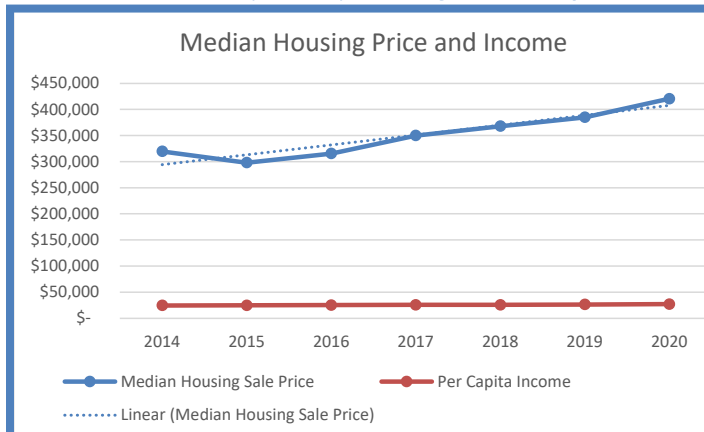
Many of the City's operations were also affected. Both Mountain Line Transit and the Flagstaff Pulliam Airport experienced a dramatic decline in use. Prior to the COVID-19 Pandemic, Flagstaff Pulliam Airport had seen an increase in use corresponding to the airport adding a second air carrier and increasing flight frequency. The first two months of 2020 set an enplanement and passenger pace that would have broken the 2019 record; however, after initial COVID-19 stay at home orders went into effect, the entire airline industry collapsed. The Flagstaff Pulliam Airport finished 2020 with the record lowest number of enplanements and passengers during the reporting time frame. Similarly, Mountain Line service was reduced to its weekend schedule seven days a week for much of 2020, and fare collection was suspended beginning March 23, 2020. Although re-openings in late 2020 brought back some ridership, Mountain Line finished 2020 with the lowest number of boardings during the reporting period.

Many of the City's data points in this report, however, were not heavily impacted by the pandemic. This is partly due to the nature of individual metrics and partly due to data availability. For example, due to the data release dates for the Census Bureau's American Community Survey, many of the community wellbeing indicators for this report are a year delayed. This means some numbers in this report may not reflect COVID-related impacts experienced during 2020.



HUMAN ENVIRONMENT - HOUSING

After highlighting this measure in 2019's Annual Report, the median housing sale price increased again from \$385,000 in 2019 to \$420,535 in 2020 (a 9 percent increase). Part of the increase in 2020 is due to the COVID-19 pandemic which exaggerated an already competitive housing market. Since a low point in 2015, home sale prices have increased by 32 percent, with the yearly rate of change increasing over the last three years. Meanwhile, per capita income has only increased 7 percent in the past six years, per the American Community Survey's 5-year estimate. The lack of affordable and workforce housing in the Flagstaff community has been a problem for over 50 years. Data shows housing costs, pushed higher by limited supply and external demand, have exceeded the buying and renting power of the Flagstaff workforce for decades while income remained stagnant. In 2017, 54.6 percent of respondents to the Economic Collaborative of Northern Arizona (ECoNA) Housing Attainability for the Flagstaff Workforce survey stated they are considering leaving Flagstaff



because of housing costs. In addition, 43.6 percent of respondents stated that they plan to leave Flagstaff in the "next few years" due to housing costs. These trends highlight the need for a continued focus on affordable housing in Flagstaff and affirms the decision made by City Council to declare a housing emergency.

Affordable, accessible, and decent housing is of critical importance to a community's health and viability. On December 1, 2020, City Council declared a Housing Emergency in Flagstaff, prioritizing affordable housing within City operations to create safe, decent, and affordable housing opportunities for all community members. In response to the City's declaration, throughout 2020 and into 2021, City staff have been working toward a number of plans and

policies to address housing. The Incentive Policy for Affordable Housing, an incentive approach that allows developers density and other financially-beneficial incentives for providing affordable units, has seen renewed focus from City Council and staff to ensure it is working as intended. The City's 10-year housing plan is also under development and will establish policies and strategies with the goal of increasing Flagstaff's housing stock.

HUMAN ENVIRONMENT - WALKING AND BIKING

Enhancing the conditions for active transportation and increasing active transportation use were key elements of various goals and policies in the Regional Plan. Over the seven-year annual reporting period, however, data points indicate a slowly changing landscape for walking and biking. Although only conducted twice in the reporting period, the City's Mode Share Trip Diary Survey indicates a stagnant walking and biking population. Between 2014 and 2018, while walking and biking infrastructure expanded, bike mode share grew by only 0.2 percentage points and walk share decreased by 0.8 percentage points. Census Bureau data on mode share to work shows a similar trend. In 2014, walk and bike mode share were 10 percent and 5 percent respectively, while in 2019 they were 11 percent and 3 percent.

Flagstaff's Walkability and Bikeability scores (measures out of 100) have changed little between 2014 and 2020 as well. Walkability increased from 33 to 38 and Bikeability decreased from 73 (2015 number) to 65 because of a methodology change that incorporated a broader range of variables. Looking at infrastructure improvements, however, the City has increased the percentage of streets with sidewalks on both sides, reaching 56 percent for major roads and 54 percent for public roads overall. FUTS miles also increased from 55.2 to 57, with plans for additional mileage in the future. Complete bike lane percentages have remained largely stagnant, increasing 1 percentage point from 71 percent to 72 percent.

The infrastructure conditions that support walking and biking in Flagstaff vary widely. Neighborhoods such as Southside and Historic Downtown have Walkability scores in the 70s and Bikeability scores in the 90s, while more suburban neighborhoods such as Ponderosa Trails have walkability scores in the 10s/20s and Bikeability scores in the 60s. While many of Flagstaff's suburban neighborhoods have sidewalks and integrate the FUTS, the methodology that Walkscore uses to calculate Walkability and Bikeability scores also considers built environment variables such as density and proximity to amenities. These elements are shown to impact the decision to walk and bike as much as infrastructure and may explain the stagnant walking and biking mode share. In order for the City to fully understand its active transportation landscape, future reporting efforts should focus on the intersection of active transportation use and the built environment in its entirety.

NATURAL ENVIRONMENT

ENVIRONMENTAL & CONSERVATION PLANNING

Measure	2014	2015	2016	2017
Acres of protected open space within city limits	20 new; 2,769 total	0 new; 2,769 total	0 new; 2769 total	300 new; 3,069 total
Open space - per acre budget	not available	\$8.1	\$11.7	\$10.6
Volunteer Hours on Open Space	727	858	3,850	557
Number of community gardens and gardeners	5 community gardens 78 participants	5 community gardens 94 participants	5 community gardens 126 participants	5 community gardens 90 participants

PUBLIC FACILITIES - SOLID WASTE

Measure	2014	2015	2016	2017
Amount of solid waste disposed in Cinder Lake landfill and remaining useable life	85,473 tons Est closure date: 2054	86,891 tons Est closure date: 2054	91,150 tons Est closure date: 2054	99,146 tons Est closure date: 2054
Tons of recycling and waste diversion rate (SF homes diversion rate)	5,912 tons 39% (14%)	7,254 tons 42% (17%)	6,094 tons 43% (13%)	6,881 tons 27% (15%)

ENERGY

Measure	2014	2015	2016	2017
Municipal energy consumption in City facilities per square foot (in kilowatt hours)	23.9 kWh	24.5 kWh	25.8 kWh	25.3 kWh
Renewable energy generated by City facility installations	3,496 MWh 6.5% of City's energy use	3,553 MWh 6.7% of City's energy use	2,902 MWh 5.5% of City's energy use	2,729 MWh 5.4% of City's energy use

Before 2014, the City purchased thousands of acres of State lands for conservation. The purchasing of open space has leveled off, and the program is now focused more on the management of these lands. A key component of open space management is volunteer hours. After three years of volunteer hours below 1000, 2020 saw an increase of over 60 percent (545 hours). This might be partially due to COVID-19 and the widespread increase in participation in outdoor activities. The same impact may also have contributed to a record number of community garden participants.

According to the National Recreation and Parks Association, the average jurisdiction that participates in their Park Metrics program manages 9.9 acres of parkland per 1000 residents. The City of Flagstaff far surpasses this number, managing over 40 acres of open space per 1000 residents. However, Flagstaff's open space is not evenly nor equitably distributed throughout the city. Ideally, each neighborhood in a city should have a park or open space within walking distance of every resident. In Flagstaff, open space and park areas such as Thorpe Park and Buffalo Park account for large portions of the total open space area but are only accessible, in terms of walking, to certain communities. The City's Southside Community Plan identifies the need for parks and open space in the Southside community. The City does not currently own any land within the Southside that is planned for a park. As the City works toward an updated Regional Plan, metrics such as population within walking distance to a park could be added to better understand the accessibility and distribution of open space areas.

Energy consumption for City buildings has remained fairly steady over the last seven years. The increase in energy consumption per sq ft in 2020 is the result of better information on building occupancy and a more accurate total square feet number used in calculations. Due to the COVID-19 pandemic, total energy use was indeed down over previous years.

2018	2019	2020	Trend
0 new; 3,069 total	0 new; 3,069 total	0 new; 3,069 total	→
\$10.59	\$12.87	\$10.56	→
443	867	1,412	→
5 community gardens 87 participants	5 community gardens 82 participants	5 community gardens 126 participants	→

¹ Staff revised how the tons of recycling and the diversion rate were calculated in 2018. The new tons calculation now accounts for the contaminated recyclables (about 34% of collected recyclables) that are delivered to the recycling center but sorted out and delivered to the landfill as trash. This calculation also incorporates the large amount of material from a business that was diverted through use as alternative daily cover up until 2017 when the business closed, significantly lowering the diversion rate.

2018	2019	2020	Trend
96,862 tons Est closure date: 2054	91,184 tons Est closure date: 2054	95,948 tons Est closure date: 2054	→
6,632 tons 9% (15%)	5,328 tons 8% (13%)	6,502 tons 8% (14%)	→

2018	2019	2020	Trend
23.9 kWh	24.8 kWh	32.7 kWh	→
2,936 MWh 5.6% of City's energy use	2,588 MWh 4.7% of City's energy use	3,014 MWh 5.7% of City's energy use	→

Renewable energy generation decreased in 2016 and has remained lower due in large part to the combined heat and power (cogeneration) system at the Wildcat Water Reclamation Plant not running. This system likely will not come back online. A new cogeneration system is expected to be a few years away.

At this time all renewable energy generation at the City is performed by solar installations at four locations (Rio de Flag Waste Water Treatment Plant; Wildcat Waste Water Treatment Plant; City Hall; Aquaplex). In 2020, these systems experienced very few disruptions and thus 2020 saw the highest aggregate performance from these systems in the past five years. In addition to the 3,014 MWh of renewable energy generated by the solar installations at City facilities (shown in the table), the City also procured 872 MWh of renewable hydro electricity from the Hoover Dam in 2020. This Hoover procurement resulted in a net savings of \$23,457 in utility bills.

The overall volume of solid waste increased by over 4000 tons, but remained below the landfill's 2017 high of 99,000 tons. The variation experienced over the last seven years of reporting is typical for a landfill. The high-point in 2017 can be attributed to a busy year of construction activity. Total tons of recycling increased over 2019 numbers but did not reach the high seen in 2015. The end destination of recycled material is dependent on the material. All material is sorted, baled, and marketed to end-market processors. The exact destinations are not known since this is proprietary business information. It is likely that far less material is going to China and other Asian markets than a couple of years ago due to the import bans placed on recyclables. Even when material is recycled domestically, it is likely to travel out of state given the lack of processing infrastructure in Arizona.

NATURAL ENVIRONMENT

WATER RESOURCES				
Measure	2014	2015	2016	2017
Water, Wastewater, Reclaimed Water and Stormwater Annual Operating Budget ¹	FY15: \$15.9 million	FY16: \$17.3 million	FY17: \$17.8 million	FY18: \$18.4 million
Potable Water				
Total Water usage (billed) (gallons per capita per day) ²	94	88	93	91
kWh of energy used to produce and deliver potable water	21,117,850 kWh	19,253,690 kWh	20,279,800 kWh	17,899,000 kWh
Gallons of potable water produced and delivered	2.4 billion gal	2.3 billion gal	2.6 billion gal	2.6 billion gal
Energy cost per thousand gallons of potable water produced and delivered ³	\$0.76	\$0.72	\$0.78	\$0.71
Peak day consumption vs. total capacity (in million gallons)	Peak = 12.1 on 6/21 Total capacity = 18.84	Peak = 10.9 on 6/26 Total capacity = 18.69	Peak = 11.4 on 6/23 Total capacity = 18.69	Peak = 10.8 on 7/6 Total capacity = 18.69
Wastewater & Reclaimed Water				
Gallons of wastewater treated	2.007 billion	2.031 billion	1.981 billion	2.050 billion
Energy cost per thousand gallons of wastewater treated ³	\$0.53	\$0.61	\$0.56	\$0.48
Kilowatt hours used to treat effluent and produce reclaimed water	9,996,126 kWh	10,832,092 kWh	10,822,467 kWh	10,038,214 kWh
Gallons of reclaimed water produced and delivered ⁴	1.910 billion produced 630,195,834 delivered	1.967 billion produced 625,959,771 delivered	1.947 billion produced 592,071,267 delivered	2.050 billion produced 578,680,000 delivered
Stormwater				
Number of nonconforming properties brought into compliance with stormwater regulations	13	3	5	2

The overall water resources' patterns are difficult to see from comparing year-to-year metrics. Water consumption per capita has been dropping over the last 25 years. Annual variability is related to population accuracy and variability of water use within the industrial and commercial sectors. Water Services is continually replacing aging infrastructure, including water mains, pumps, blowers, motors, and electrical components, all of which either reduce water losses or improve energy efficiency. The drop in energy cost of potable water is related to a good snow year that resulted in a larger amount of water in Upper Lake Mary. Treating water from Upper Lake Mary is cheaper than treating groundwater.

There is not a trend, up or down, with wastewater influent. Since population estimates indicate an increasing trend, a stable influent volume is an indication that either people are using less water indoors (consistent with a reduction in water use) and/or the City has seen a reduction in inflow and infiltration into the sewer system. This can be an illegal discharge, intentional or not, of stormwater or other water into the sewer system, or it can come from stormwater that finds its way through cracks and into the sewer pipeline.

Two to five properties removed from the Special Flood Hazard Area is a more typical result than the 13 reported in 2014. This number is missing for 2020 due to a vacancy in the Water Services Division.

2018	2019	2020	Trend
FY19: \$18.5 million	FY20: \$19.1 million	FY 21: \$19.9 million	→
85	84	90	→
18,141,300 kWh	18,303,560 kWh	17,785,180 kWh	→
2.6 billion gal	2.7 billion gal	2.7 billion gal	→
\$0.71	\$0.65	\$0.60	↘
Peak = 10.5 on 6/29 Total capacity = 17.6	Peak = 10.8 on 6/21 Total capacity = 17.6	Peak = 11 on 7/31 Total capacity = 21	→
1.813 billion	2.007 billion	1.850 Billion	→
\$0.57	\$0.45	\$0.47	→
10,500,199 kWh	7,652,442 kWh	10,213,765 kWh	→
1.813 billion produced 589,701,484 delivered	2.007 billion produced 540,356,496 delivered	1.77 billion produced 725,379,000 delivered	→
5	4	N/A For 2020 due to vacancy	→

¹ See page 16 for FY20 CIP Budget chart.

² Calculation based on a Flagstaff population of 76,338 - Arizona Office of Economic Opportunity for July 1, 2019.

³ All costs presented are energy only (not including operation and maintenance).

⁴ Difference between reclaimed gallons produced and delivered is water discharged to the Rio de Flag in the off season.

MISSING METRICS from the NATURAL ENVIRONMENT:

Wildlife corridors and habitat land consumed or preserved by development (Arizona Game and Fish Department-designated); Concentration of natural resources, conservation priority areas, open space acres protected through conservation easement, purchase, etc.; Biodiversity (birds, plants, amphibians, fish, mammals, reptiles) – total species count – Arizona Game and Fish Department data (when available); Natural environment maps with pertinent information (there is a Prairie Dog map that was updated in 2019 on the City's website, <https://www.flagstaff.az.gov/3313/Annual-Reports>, with 2017 survey data).

BUILT ENVIRONMENT

COMMUNITY CHARACTER

Measure	2014	2015	2016	2017
Dollars allocated to beautification of public areas	Operations: \$141,823 Capital: \$3,026,213 Total: \$3,168,036	Operations: \$182,714 Capital: \$3,767,477 Total: \$3,950,191	Operations: \$339,408 Capital: \$4,303,050 Total: \$4,642,458	Operations: \$328,379 Capital: \$3,891,890 Total: \$4,220,269
Number of brownfield environmental site assessments completed (within city limits)	5	6	2	0
Number of brownfield redevelopment projects approved	0	0	0	0
Heritage resources inventoried, saved, and demolished	Not available	123 inventoried, 8 saved, 5 demolished	81 inventoried, 5 saved, 3 demolished	139 inventoried, 0 saved, 0 demolished

GROWTH AREAS & LAND USE

Measure	2014	2015	2016	2017
Permits & Development Projects				
Residential permits issued for new construction	183	229	258	260
New residential units permitted	422	409	493	719
Accessory Dwelling Unit permits	Not available	4	7	14
Commercial, industrial, and other non-residential permits issued	35	28	27	37
Commercial, industrial, and other non-residential space permitted (s.f.)	532,215	147,855	593,326	893,490
Green buildings built – residential (r) or commercial (c)	City: 6 (r), Cnty w/in FMPO: 4 (r), NAU: 3 (c)	City: 7 (r), 1 (c), Cnty w/in FMPO: 5 (r), NAU: 1 (c)	City: 9 (r), 1 (c), Cnty w/in FMPO: 9 (r), NAU: 3 (c)	City: 6 (r), 2 (c), Cnty w/in FMPO: 11 (r), NAU: 1 (c)
Number of mixed use developments	0	1; Village at Aspen Place	2; The Loft, RP Electric	2; The Hub, The Standard
Number of infill or redevelopment projects	11 infill 7 redevelopment	2 infill 1 redevelopment	8 infill 5 redevelopment	6 infill 5 redevelopment

The overall trends for Community Character are stable. Beautification funding, which is generated by tourism revenues, remains high and reached a record operations budget in 2020. Brownfield and heritage resource numbers are expected to vary from year to year depending on specific projects. There is a flattening trend in demolitions of historic structures within designated historic districts and overlay zones. Inventoried heritage resources increased dramatically in 2020 due to an ongoing, grant-funded project to document historic resources in the Southside Neighborhood. This includes some resources that were re-inventoried with more detailed information. Lower numbers of heritage resources inventoried in past years are partially due to a complex multi-step review process. All historic projects are now processed through the City's internal digital system and are considered more accurate starting with 2018.

The Growth Areas & Land Use measures are showing continued, and somewhat steady, growth within Flagstaff since the end of the Great Recession. Although construction slowed in some areas of the US, residential and commercial permits have remained steady in Flagstaff throughout the COVID-19 pandemic. During 2020, the City permitted several large, mixed-use developments, and continued on a consistent path in terms of infill and redevelopment projects.

2018	2019	2020	Trend
Operations: \$333,722 Capital: \$5,544,672 Total: \$5,878,394	Operations: \$307,164 Capital: \$3,988,290 Total: \$4,295,454	Operations: \$500,298 Capital: \$4,222,409 Total: \$4,722,707	→
0	0	0	→
0	0	0	→
55 inventoried, 0 saved, 3 demolished	79 inventoried, 0 saved, 1 demolished	354 inventoried, 0 saved, 0 demolished	↗

2018	2019	2020	Trend
356	290	291	→
406	284	294	→
13	33	35	↗
29	62	43	→
410,723	254,360	585,586	→
City: 7 (r), 0 (c), Cnty w/in FMPO: 10 (r), NAU: 1 (c)	City: 3 (r), 2 (c), Cnty w/in FMPO: 6 (r), NAU: 1 (c)	City: 8 (r), 1 (c), Cnty w/in FMPO: 2 (r), NAU: 0	→
0	1; Flagtown Lofts	3; Park Place, 500 W For- est Meadows, Prema	→
9 infill 2 redevelopment	4 infill 7 redevelopment	7 Infill 9 Redevelopment	→

Although not as high as 2019, the City permitted the second-highest number of ADUs during the reporting period in 2020. ADUs can provide multi-generational housing, help homeowners make additional money on their property, and provide an attractive, more affordable option for people to rent. The popularity of ADUs demonstrates the need for more affordable housing options. In July 2021, the Flagstaff City Council approved zoning and ADU regulation changes that will make ADUs more feasible and financially viable. Moving forward, the City expects ADU permits to continue growing.

BUILT ENVIRONMENT

GROWTH AREAS & LAND USE (Continued)				
Measure	2014	2015	2016	2017
Land Use				
Acres annexed into city limits	0	180	832	20
Number of major and minor amendments to the plan	0	1 major: Map 25 Transportation Network Illustration, 2 minor: La Plaza Vieja Neighborhood Specific Plan, Core Services Yard map amendment	0 major 5 minor: McMillan Mesa Village Amendment, Buffalo Park W, Guadalupe Park, Highland Ave Open Space, Observatory Mesa Open Space	0 major 3 minor: Chapter 3 Plan Amendments Part 1 and 2, Schultz Y Trailhead
Area types changed on the Future Growth Illustration (acres)	0	Area in White to Existing Suburban = 15 Future Urban to Existing Suburban = 9.7 Future Suburban to Existing Suburban = 4	Area in White to Park / Open Space = 2,279.2 Area in White to Existing Suburban = 6.3 Existing Urban to Park/ Open Space = 1.1 Existing Suburban to Park/Open Space = 5.3	Area in White to Park / Open Space = 20
Land Use zoning distribution within activity centers (in acres)	Commercial: 814 Industrial: 201 Public: 434 Open Space: 0 Residential: 628 Transect Zone: 1	Commercial: 813 Industrial: 201 Public: 487 Open Space: 0 Residential: 951 Transect Zone: 1	Commercial: 815 Industrial: 198 Public: 486 Open Space: 0 Residential: 954 Transect Zone: 4	Commercial: 814 Industrial: 198 Public: 484 Open Space: 0 Residential: 955 Transect Zone: 4
Land Use zoning distribution outside activity centers (in acres)	Commercial: 891 Industrial: 1,294 Public: 15,581 Open Space: 268 Residential: 17,605	Commercial: 901 Industrial: 1,421 Public: 15,579 Open Space: 268 Residential: 17,276	Commercial: 910 Industrial: 1,367 Public: 15,589 Open Space: 2,990 Residential: 16,048	Commercial: 910 Industrial: 1,364 Public: 15,591 Open Space: 3,009 Residential: 16,040 Transect Zone: 1
City building and total impervious surface coverage percentage ²	Bldg. = 3.9% Impervious = 15.7%	Bldg. = 4.1% (1,678ac.) Impervious = 15.8%	Bldg. = 4.2% (1,652ac.) Impervious = n/a	Bldg. = 4.2% (1,663ac.) Impervious = n/a

Over the seven-year reporting time frame, major and minor plan amendments have declined with no new amendments in the past two years.

The largest change to the Regional Plan's Future Growth Illustration Map is an increase in Park/Open Space area types. Over the seven-year reporting period, over 2,600 acres were changed from undesignated areas to Park/Open Space. Most of this change occurred on Observatory Mesa and McMillan Mesa where a substantial portion of land was redesignated as park/open space. The City purchased the Observatory Mesa land in 2013 and subsequently developed a plan in 2015 to manage the area's natural resources and preserve it as open space. The City of Flagstaff acquired McMillan Mesa Natural Area in November 2016 after approximately 86 percent of Flagstaff voters voted in favor of its preservation. The 300-acre McMillan Mesa Natural Area is one of the last intact native grasslands within Flagstaff and provides habitat for elk, deer, and other mammals. No land on the Future Growth Illustration map has been redesignated as open space since 2018.

2018	2019	2020	Trend
0	2	1.87	n/a
1 major: McMillan Mesa Natural Area 1 minor: High Occupancy Housing Specific Plan	no amendments	no amendments	n/a
Area in White to Park / Open Space = 231.1 Special District to Park / Open Space = 1.5 Employment to Park / Open Space = 36.5 Existing Suburban to Park / Open Space = 58.9 Area in White to Special District = 10.0	no changes	Existing Suburban to Industrial/Business Park = 35	n/a
Commercial: 823 Industrial: 186 Public: 476 Open Space: 0 Residential: 921 Transect Zone: 4	Commercial: 826 Industrial: 171 Public: 476 Open Space: 0 Residential: 933 Transect Zone: 4	Commercial: 864 Industrial: 145 Public: 476 Open Space: 0 Residential: 919 Transect Zone: 4	n/a
Commercial: 927 Industrial: 1,365 Public: 15,591 Open Space: 3,023 Residential: 16,048 Transect Zone: 1	Commercial: 929 Industrial: 1,365 Public: 15,592 Open Space: 3,024 Residential: 16,047 Transect Zone: 1	Commercial: 933 Industrial: 1,302 Public: 15,588 Open Space: 3,024 Residential: 16,084 Transect Zone: 1	n/a
Bldg. = 4.3% (1,707ac.) Impervious = n/a	Bldg. = 4.3% (1,689ac.) Impervious = n/a	Bldg. = 4.12% (1,624ac.) Impervious = n/a	→

¹ Small parks and large active parks are typically zoned Public Facilities (PF) and are counted as Public since actual facilities such as City Hall share that zoning. Public Lands Forest (PLF) are also counted as Public. Only areas zoned Public Open Space (POS) are counted as Open Space. These only include dedicated passive open space such as Observatory Mesa, Picture Canyon, and other smaller locations.

² The City Stormwater Division is developing a master impervious coverage GIS layer that is not ready yet, but is expected to be an improvement in accuracy for future years.

Although the mix of land use zoning types within designated activity centers has changed little from year to year, the activity centers have been recalibrated through two Specific plans and look different today than they did in 2014. Commercial space has increased by 50 acres, public space by 42 acres, residential by 291 acres, and transect zones by 3 acres. Industrial space decreased by 56 acres. Much of this change has been the result of two Specific plans. The La Plaza Vieja and High Occupancy Housing plans both recalibrated the location of activity centers and their use-mix. Future changes to activity centers are still expected, with current work focusing on interpreting the specific land parcels that are/should be included in activity centers. This work may increase the total land area designated as part of an activity center.

The land use zoning distribution outside of activity centers has remained fairly stable over the seven-year reporting time period. The largest change occurred to open space, which increased by 2,756 acres. As mentioned above, this change includes large swaths of land on Observatory and McMillan Mesas that were redesignated as open space after the City purchased the respective land. From 2014 to 2020, areas zoned as residential declined by over 1500 acres. Similarly, the area zoned as industrial declined by 119 acres.

BUILT ENVIRONMENT

TRANSPORTATION				
Measure	2014	2015	2016	2017
Walkability and Bikeability (scores out of 100)	Walk score = 33 Bike score = n/a	Walk score = 33 Bike score = 73	Walk score = 36 Bike score = 73	Walk score = 37 Bike score = 64
Mode share numbers from Trip Diary Survey ¹	Transit: 4.3% Bike: 7.6% Walk: 15.1% Cars: 73%	n/a	n/a	n/a
Pedestrian and bicycle crash numbers and percent of total crashes ²	44 ped (2.5%) 70 bike (4.0%)	26 ped (1.4%) 33 bike (1.8%)	26 ped (1.3%) 32 bike (1.6%)	27 ped (1.4%) 38 bike (1.9%)
Miles of FUTS/new FUTS installed	0.6 mile added 55.2 total FUTS miles	1.0 mile added 56.2 total FUTS miles	0.0 mile added 56.2 total FUTS miles	0.16 mile added 56.4 total FUTS miles
Percent of streets with sidewalks along both sides	major roads = 42% public roads = 51%	major roads = 52% public roads = 54%	major roads = 55% public roads = 54%	major roads = 55% public roads = 55%
Complete bike lane percentages ³	n/a	n/a	71%	72%
Percentage of population within 3/4 mile of transit stop	73%	73%	59%	60%
Percentage of population within 1/4 mile of high frequency transit (peak headways under 10 mins) ⁴	n/a	n/a	n/a	n/a
Transit Score ⁵	n/a	n/a	n/a	35
Transit Boardings	1,870,842	1,878,075	2,007,489	2,212,913
Internal vehicle miles traveled (VMT), average VMT/capita/day ⁶	1,474,767 VMT/day 17 VMT/capita/day ('13)	1,524,069 VMT/day 17 VMT/capita/day	1,537,765 VMT/day 16.9 VMT/capita/day	1,604,288 VMT/day 17.4 VMT/capita/day
Number of passengers, enplanements, and operations at Flagstaff Pulliam Airport	enplanements: 68,754 operations: 41,986	passengers: 134,517 enplanements: 67,421 operations: 44,527	passengers: 133,416 enplanements: 66,526 operations: 46,850	passengers: 146,531 enplanements: 72,679 operations: 43,527

Overall, the walking and biking landscape in Flagstaff has remained stagnant. Flagstaff's bike score fell in 2017 because Walk Score updated its scoring methodology. Since then, the City's bike score has grown by one point. Trip diary surveys were conducted in 2012 and 2018 and indicate very little movement in mode share. The numbers suggest a possible decline in walking mode share, however, this change is likely within the sample margin of error. The Census Bureau's American Community Survey data on mode share to work shows a similar trend, indicating the walking and biking population has not substantially changed. The City is currently working toward an Active Transportation Master Plan which is intended to bolster bike/ped investments and use. No new FUTS mileage was added in 2020. The lack of change in active transportation is discussed further in the Key Insights section.

The population living within either a quarter-mile of high-frequency transit or three-quarters of a mile of transit has increased over the last three years. As Mountain Line's routing structure has not significantly changed within the last three years, this is largely due to new developments that have placed more residents close to transit. For example, the Hub/Jack and Freemont Station – two large student housing developments – finished construction in the last three years and both are located along the high-frequency route 10 service. As development continues in accordance with designated activity centers, this number may continue to increase.

2018	2019	2020	Trend
Walk score = 37 Bike score = 64	Walk score = 38 Bike score = 65	Walk score = 38 Bike score = 65	→
Transit: 4.9% Bike: 7.8% Walk: 14.3% Cars: 73%	n/a	n/a	→
18 ped (1.2%) 25 bike (1.6%)	n/a	n/a	↘
1.2 miles added 57.0 total FUTS miles	0 mile added 57.0 total FUTS miles	0	→
major roads = 56% public roads = 54%	major roads = 56% public roads = 54%	0	→
72%	72%	0%	→
60%	62%	63%	→
11%	12%	13%	→
35	35	35	→
2,530,626	2,507,507	1,353,846	→
1,615,410 VMT/day 17.3 VMT/capita/day	1,594,818 VMT/day 17.3 VMT/capita/day	1,740,832 VMT/day 18.7 VMT/capita/day	→
passengers: 140,464 enplanements: 70,160 operations: 44,909	passengers: 248,294 enplanements: 123,957 operations: 43,059	passengers: 129,032 enplanements: 65,006 operations: 38,752	→

¹ The 2014 column is actually 2012 data. Updated data is only available every 5-7 years.

² Crash data was not able to be collected from ADOT in 2019 and 2020. ADOT changed their access system and the City needs to renew its agreement for access to the data.

³ The percentage is based on streets eligible for bike lanes as decided by City Engineering and the FMPO; it primarily omits local roads.

⁴ Methods changed for calculating the percentage of population near a transit stop for 2016. The previous method likely overestimated the percentage of people near transit stops by only using residential units via GIS (2014 used 40,495 units) since occupancy and completeness of data varies throughout the FMPO. From 2016 on, the numbers instead use population through NAIPTA's own Remix software that is based on current ACS data and an extrapolation of the total FMPO population per Arizona Office of Economic Opportunity data (extrapolation is per a multiplier to the sum of Flagstaff City and other Census Designated Places within the FMPO. The multiplier is based on the difference in those same places and a known FMPO population in 2010. The multiplier is 1.107) between 2016 and 2018. The 2019 and 2020 FMPO population estimates were provided by MetroPlan, with 2020's estimated at 913,043.

⁵ Transit Score is provided by Walkscore.com and operates within the same 0-100 scale.

⁶ Per capita data based on total FMPO population per footnote 4. For 2020, updates from ACS are delayed so updated 2019 5-year estimates were used. The methodology used to calculate total VMT likely does not reflect actual VMT during 2020.

Transit boarding dropped by roughly 50 percent in 2020. This is almost entirely due to the COVID-19 pandemic and the resulting higher number of people working/studying from home or not working. Throughout 2020, businesses were required to close or adjust operations that forced many retailers into a more prominent online presence. Similarly, Northern Arizona University and Coconino Community College transitioned to online learning, drastically reducing the student population that utilized the Mountain Line Bus System.

Similarly, due to pandemic-related travel restrictions and personal choices not to travel during a pandemic, passengers and enplanements at Flagstaff Pulliam Airport dropped precipitously. The drop also appears more dramatic because the airport had a record year in 2019. The drop in transit and air travel throughout 2020 is discussed further in the Key Insights section.

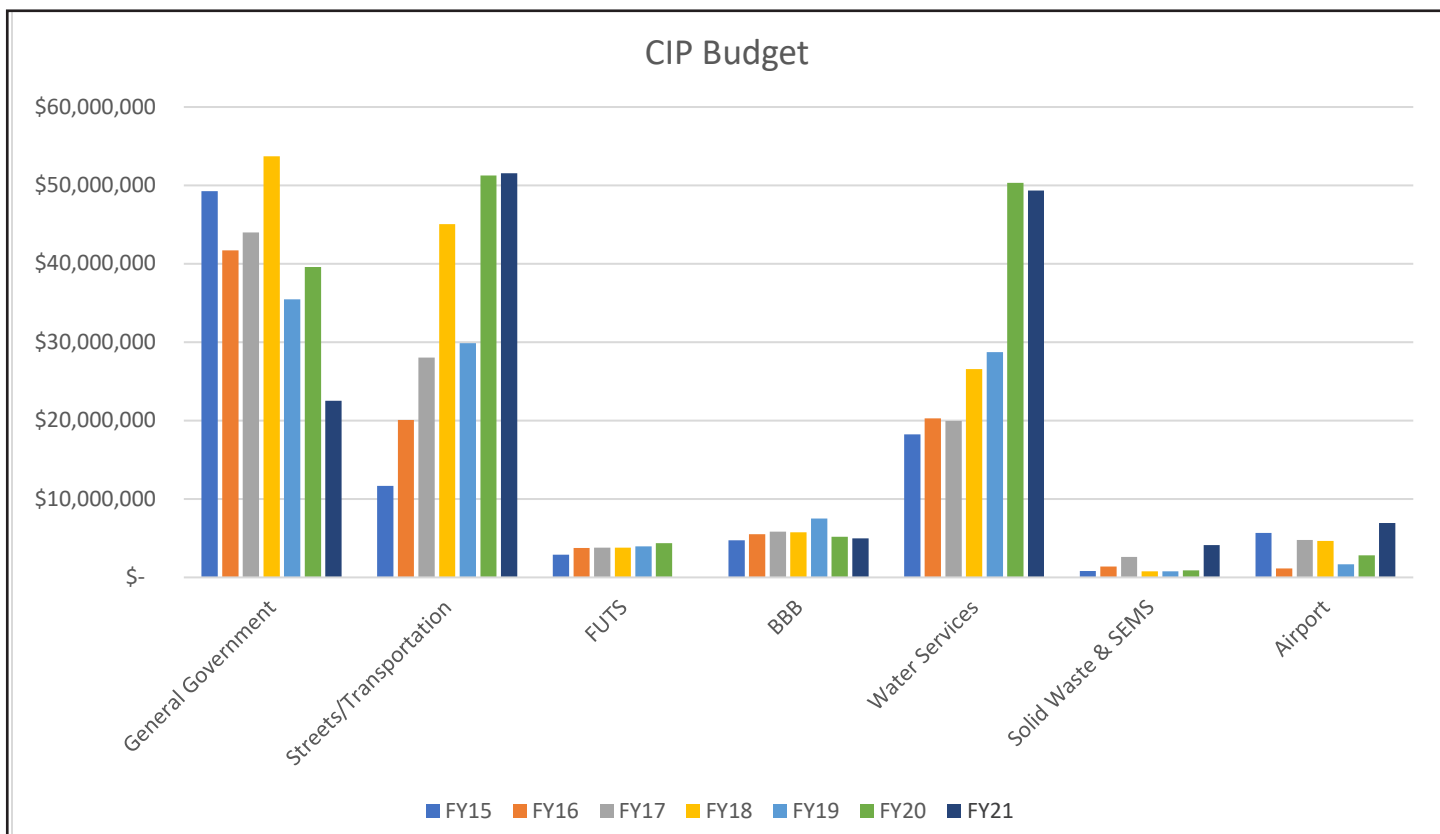
The total internal vehicle miles traveled in 2020 shows an increase over 2019, however, due to the methodology used to model VMT over time, this measure more accurately represents what would have happened in 2020 without COVID-19 shutdowns. Actual VMT in 2020 likely decreased over 2019.

BUILT ENVIRONMENT

COST OF DEVELOPMENT

Measure	2014	2015	2016	2017
Percent of total City budget devoted to Capital Improvement Projects (CIP)	39%	39%	41%	42%
Dollars spent on road improvement CIP projects ¹	\$8 million	\$10.7 Million	\$8.8 Million	\$20.4 Million
Miles of road improvements	Not available	Road Repair & Street Safety = 125.9 lane miles CIP = 1.55 lane miles	Road Repair & Street Safety = 99 lane miles CIP = 3.4 lane miles	Road Repair & Street Safety = 63.6 lane miles CIP = 18.3 lane miles

¹ This amount is the known expenditures through the first three quarters of the fiscal year.



In the CIP budget, funding for streets and transportation reached a new high of \$51.6 million in FY2021. General Government funding hit its lowest point in FY2021, while the total budget decreased from \$154 million in FY2020 to \$140 million in FY2021. The lack of FUTS-Specific funds for FY2021 in the bar chart above is because the FUTS is now funded directly through the transportation tax and is included in the Streets/Transportation category for 2021.

Over the last two years, both Water Services and the Airport have seen a spike in funding. The major projects for water, wastewater, reclaimed water, and stormwater that are driving the increase in funding include Switzer Canyon transmission line, Fir Avenue waterline replacement, Lake Mary land acquisition, Fort Tuthill waterline loop phase 2, Summit waterline replacement, Fort Tuthill sewer line oversizing, and the Rio De Flag project. Fifty-five projects are scheduled/underway at a total budget of \$49.3 million for FY2021.

At the Airport, parking improvements, snow removal equipment, building design, taxiway apron design, and drainage improvements are scheduled at a budgeted cost of \$6.9 million for FY2020-2021.

2018	2019	2020	Trend
39%	46%	31%	→
\$7.4 Million	\$8 Million	\$18.7 Million	→
Road Repair & Street Safety = 46.4 lane miles CIP = 3.1 lane miles	Road Repair & Street Safety = 80.8 lane miles CIP = 1.2 lane miles	Road Repair & Street Safety = 59.4 lane miles CIP = 1.6 lane miles	→

The portion of the budget dedicated to capital projects varies from year to year and is dependent on the status of planned capital projects. In 2020, the total capital funding for road improvements increased by more than \$10 million compared to 2018 and 2019. This increase is largely due to the Fourth St Bridge construction, a \$16.3 million, 0.679 lane mile project funded by both ADOT and the City of Flagstaff. This project is inherently more costly per lane mile than other road improvement projects because of the engineering involved. The Phase I, Coconino Estates Improvements is another large, \$9.8 million project, of which \$2.7 million contributed to the increase in road improvement CIP funding in the final reporting period. This project is also more costly per lane mile because it involves utility replacements.

Additional projects involving water and sewer line repairs/replacements will take place over the next five years. Many of these improvements are funded by a sales tax increase approved by voters in November 2014 and will continue for 20 years. Every paved street maintained by the City will be improved during the term of the tax.



2020 Fourth Street Bridge After Completion: The project utilized an innovative bridge slide method that significantly reduced closures of Fourth St from 3-4 months with traditional methods to 17 days.

MISSING METRICS - BUILT ENVIRONMENT:

100-year water demand studies per City project (part of Water Services Division updates), Connectivity of roadways – measure in intersections per square mile (future FMPO metric).

HUMAN ENVIRONMENT

INDICATORS OF OVERALL COMMUNITY WELL BEING

Measure	2014	2015	2016	2017
Total population ¹	68,729	70,088	71,459	71,975
Median age ²	25.7	25.9	25.6	25.2
Percent population living in poverty ²	25%	25%	24%	23%
Educational attainment ²	90.6% high school graduate or higher	91.2% high school graduate or higher	94.4% high school graduate or higher	92.2% high school graduate or higher
Voter turnout (ballots cast/registered voters (% turnout))	Primary Election Aug 26: 8,737/28,002 (31%) General Election Nov 4: 16,910/31,140 (54%) Special Election May 20: 7,079/28,069 (25%)	Special Election Nov 3: 6,745/28,513 (24%) Special Election May 19: 4,604/29,409 (16%)	General Election Nov 8: 29,401/38,493 (76%)	n/a

NEIGHBORHOODS, HOUSING & URBAN CONSERVATION

Measure	2014	2015	2016	2017
Affordability Index: average housing + transportation cost as a percentage of income	Not available	Not available	57%: 32% Housing + 25% Transportation	56%: 31% Housing + 25% Transportation
Median Housing Sale Price (just houses that sold that year) ¹	\$319,595	\$298,000	\$315,500	\$350,000
Median rents (fair market rents for Coconino County) ²	\$710 efficiency units \$816 1 bedroom \$1,021 2 bedrooms \$1,296 3 bedrooms \$1,651 4 bedrooms	\$761 efficiency units \$909 1 bedroom \$1,135 2 bedrooms \$1,408 3 bedrooms \$1,687 4 bedrooms	\$704 efficiency units \$835 1 bedroom \$1,037 2 bedrooms \$1,309 3 bedrooms \$1,551 4 bedrooms	\$782 efficiency units \$920 1 bedroom \$1,129 2 bedrooms \$1,446 3 bedrooms \$1,719 4 bedrooms
Rental/ownership ratio ³	50% rental 50% ownership	55% rental 45% ownership	54.9% rental 45.1% ownership	55% rental 45% ownership

The data demonstrate a consistent population increase over the reporting period; however, updated numbers from the 2020 census are delayed due to COVID-19 and, therefore, the 2020 population number presented here is an updated 2019 5-year estimate. The Census produces ongoing revisions to all estimates, so per capita estimates elsewhere throughout the report may have used State population numbers. American Community Survey Poverty rates have gone down slightly the last few years, however, due to the large estimated margin of error, these numbers should be treated with caution. Other data points indicate that financial strain may not coincide with the ACS poverty measure. For example, incomes in Flagstaff have not kept pace with inflation and the City's Affordability Index has remained high.

Educational attainment has remained consistent over the last seven years. Although the data show some annual changes, the differences are within the ACS's margin of error. Despite pandemic challenges, the 2020 election had the largest national increase in voting between presidential elections on record. Voter turnout in Flagstaff followed national trends and was higher than in any other election year recorded in this report, hitting 83 percent for the 2020 general election. Hypotheses abound for why voter turnout reached record levels, including enhanced voter outreach, expansion of vote by mail, and the contentious nature of the presidential race.

2018	2019	2020	Trend
73,964	75,038	75,044	→
25.1	25.2	25.8	→
22%	20%	18%	→
93.1% high school graduate or higher	93.2% high school graduate or higher	94.1 % high school graduate or higher	→
General Election Nov 6: 28,134/40,399 (70%)	n/a	General Election Nov 3: 36,073/43,230 (83%)	n/a

¹ Population is per US Census Population Estimate as of July 1 of the listed year, except for 2020 in which the population update via the 2020 census was delayed and scheduled to be released by Sept 2021.

² Numbers are per the American Community Survey's 5-year estimates and are one year behind (e.g., 2019 Median age is actually the 2018 5-year estimate).

2018	2019	2020	Trend
56%: 31% Housing + 25% Transportation	56%: 31% Housing + 25% Transportation	56%: 31% housing + 25% transportation	→
\$368,000	\$385,000	\$420,535	→
\$898 efficiency units \$1,007 1 bedroom \$1,137 2 bedrooms \$1,611 3 bedrooms \$1,948 4 bedrooms	\$964 efficiency units \$1,024 1 bedroom \$1,266 2 bedrooms \$1,653 3 bedrooms \$2,003 4 bedrooms	\$1,026 efficiency units \$1,062 1 bedroom \$1,315 2 bedrooms \$1,712 3 bedrooms \$2,058 4 bedrooms	→
55% rental 45% ownership	53% rental 47% ownership	52.6% rental 47.4% ownership	→

¹ These houses are within Flagstaff City limits.

² Rents based on HUD estimates for Coconino County. A 2016 study by Housing Solutions of Northern Arizona showed actual Flagstaff rents were 13% to 25% more expensive.

³ 2014 numbers per Chapter XIII in the FRP30; subsequent numbers are per American Community Survey and are one year behind.

Flagstaff continues to have a high Affordability Index - currently at 56 percent. A “rule of thumb” goal would be for housing to be under 30 percent and transportation to be under 15 percent for a total affordability index under 45 percent. Housing costs are on an increasing trend (see Key Insights on page 4) with 2020 experiencing the single largest dollar increase over the reporting period. The number of rental households has remained steady with more renters than owners. This is likely due to the high cost of homeownership and the large percentage of students that live in Flagstaff that are more likely to rent than to buy. Rental costs also continue to rise across the board, contributing to the challenge of saving for home-ownership. The high cost of housing led the Flagstaff City Council to declare a housing emergency in 2020. Since then, City staff has begun working on a 10-year housing plan that aims to increase the City’s housing supply and reduce barriers to affordable housing. Housing is discussed further in the Key Insights section.

HUMAN ENVIRONMENT

NEIGHBORHOODS, HOUSING & URBAN CONSERVATION (Continued)				
Measure	2014	2015	2016	2017
Housing mix (Single-family, Multi-family, etc.)	Total units: 26,340 11,866 1-unit detached (45%) 2,637 1-unit attached (10%) Multi-family: 2,569 2-4 units (9.8%) 4,129 5-19 units (15.7%) 3,340 20+ units (12.7%) 1,799 Mobile home, RV, etc. (6.8%)	Total units: 26,506 12,222 1-unit detached (46.1%) 2,754 1-unit attached (10.4%) Multi-family: 2,565 2-4 units (9.6%) 4,153 5-19 units (15.7%) 3,141 20+ units (11.9%) 1,671 Mobile home, RV, etc. (6.3%)	Total units: 26,501 12,227 1-unit detached (46.1%) 2,826 1-unit attached (10.7%) Multi-family: 2,604 2-4 units (9.8%) 4,599 5-19 units (17.4%) 2,579 20+ units (9.7%) 1,666 Mobile home, RV, etc. (6.3%)	Total units: 26,481 12,656 1-unit detached (47.8%) 2,668 1-unit attached (10.1%) Multi-family: 2,505 2-4 units (9.5%) 4,966 5-19 units (18.7%) 2,106 20+ units (8.0%) 1,580 Mobile home, RV, etc. (6.0%)
Number of affordable housing units built by residential projects	1 ownership	2 ownership	1 ownership, 3 rental	0
Number of neighborhood/specific/illustrative plans completed	0	1: La Plaza Vieja Neighborhood Plan adopted	1: McMillan Mesa Specific Plan amended	0
Number of distressed buildings identified; number of demolitions ⁵	36 distressed (2013) 3 demolished	15 distressed demos not tracked	1 distressed	17 distressed
Allocation of Community Development Block Grant (CDBG) funding	FY2015 Total Entitlement Award = \$570,941 Previous Year's Reallocation and Program Income = \$44,528 Total = \$615,469	FY2016 Total Entitlement Award = \$579,591 Previous Year's Reallocation and Program Income = \$235,758 Total = \$815,349	FY2017 Total Entitlement Award = \$599,050 Previous Year's Reallocation and Program Income = \$41,743 Total = \$640,793	FY2018 Total Entitlement Award = \$599,000 Previous Year's Reallocation and Program Income = \$177,433.20 Total = \$776,433.20

The new simplified format from the American Community Survey (ACS) designating either 1 unit or 2+ unit structures hinders the City's ability to understand the progress made on the 'missing middle' housing types. New affordable housing units have been generated very slowly in recent years but experienced an uptick in 2020. Many promised affordable units are expected in several upcoming developments, including multiple rental developments that incorporate a mix of income-based and market-rate units. Some of these are the result of the City's Incentive Policy for Affordable Housing (IPAH), while others were developed under the Low Income Housing Tax Credit Program (LIHTC).

The City's IPAH was adopted by City Council in 2009 and encourages the creation of affordable housing units through various incentives. The IPAH document allows for the payment or reduction of fees relating to the development process. Additionally, there are regulatory incentives located in the Flagstaff Zoning Code. In the years since its adoption, City staff and other users of these documents have identified discrepancies between the IPAH, incentives in the Zoning Code, and current departmental practices that impact the effectiveness of the policy. Therefore, the IPAH will undergo an update process beginning in spring 2021 with the goal of City Council adoption by winter 2021/2022.

CDBG funding has remained relatively consistent. However, due to the COVID-19 pandemic and CARES act, additional CDBG-CV funds were allocated to the City in 2020. The CARES Act allocated CDBG-CV dollars in three rounds. The first was for entitlement communities like Flagstaff and allocated with the same annual formula as regular CDBG funds. The second allocation went only to states and not entitlement communities, and the third was for entitlement communities identified as a high-risk for evictions. The City's first allocation received was \$359,604 and the second allocation was \$766,551. The total amount of CDBG-CV from the Cares Act was \$1,126,155.

2018	2019	2020	Trend
Total units: 27,056 12,577 1-unit detached (46.5%) 3,025 1-unit attached (11.2%) Multi-family: 2,477 2-4 units (9.1%) 5,370 5-19 units (19.8%) 1,979 20+ units (7.3%) 1,628 Mobile home, RV, etc. (6.0%)	Total units: 27,452 1 unit structure (59.1%) 2+ unit structure (35.2%) Mobile home, RV, etc. (5.6%)	Total units: 28,020 11,630 1-unit detached (48.8%) 2,597 1-unit attached (10.9%) Multi-family: 4,671 2-9 units (19.6%) 3,746 10+ units (15.7%) Other: 1,195 Mobile home, RV, etc. (5%)	→
0	3 ownership	12 rental / 5 ownership	→
1: High Occupancy Housing Plan adopted	0	1: Southside Community Plan adopted	→
20 distressed 1 demolished 1 renovation	11 distressed 2 demolished 4 renovation	12 distressed 0 demolished 3 renovation	→
FY2018 Total Entitlement Award = \$621,718 Previous Year's Reallocation and Program Income = \$36,737.50 Total = \$658,455.50	FY2018 Total Entitlement Award = \$616,928 Previous Year's Reallocation and Program Income = \$80,227.48 Total = \$697,155.48	FY2020 Total Entitlement Award = \$611,295.00 Previous Year's Reallocation and Program Income = \$48,986.00 Total = \$660,281.00	→

⁴Numbers are per the American Community Survey (ACS) and are one year behind. They are based on sampling with a margin of error around 400 units each, for example, 2017's 20+ unit metric dropped 473 units but we are unaware of any large apartment demo. ACS changed how they present information for 2019; they changed/simplified the breakdown of units. The data comes from the same source.

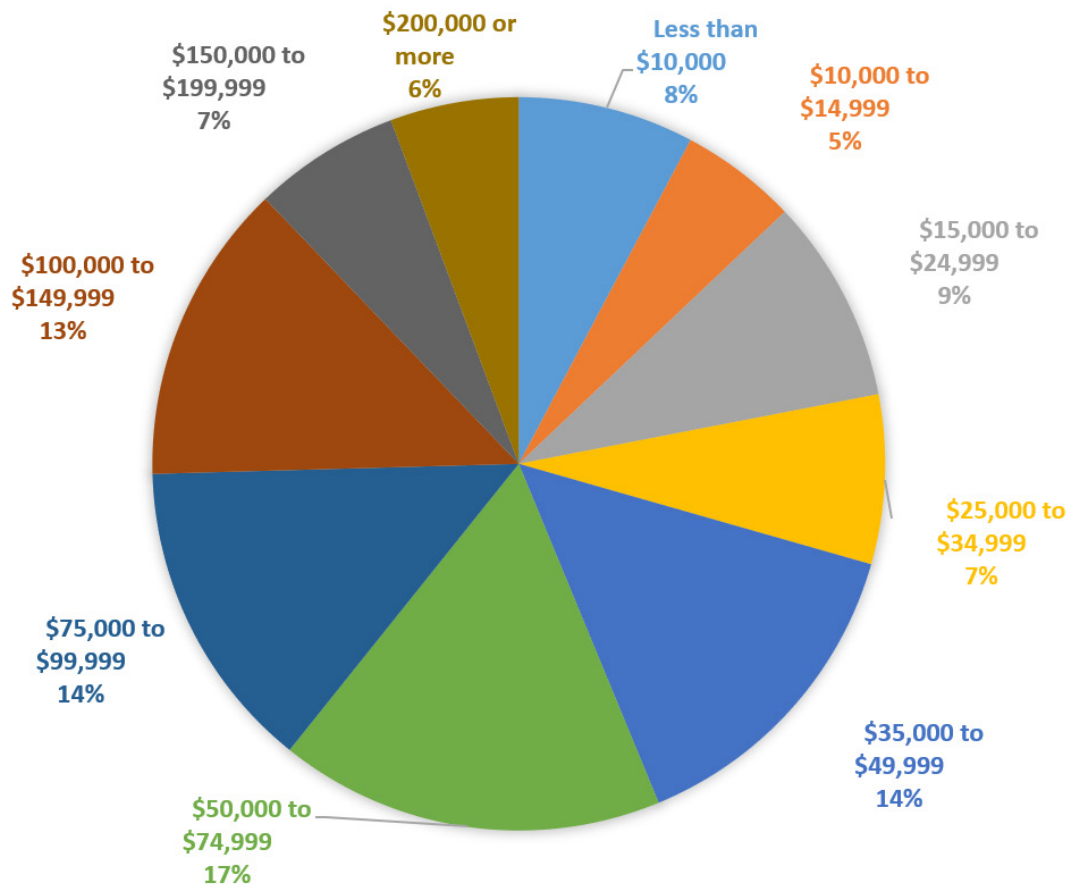
⁵The buildings identified are based on a visual survey each year from a list of potential candidates. Some remain for multiple years; it is not a cumulative figure.

HUMAN ENVIRONMENT

ECONOMIC DEVELOPMENT				
Measure	2014	2015	2016	2017
Median earnings and per capita income ¹	Median earnings: \$19,516 Per capita: \$24,455	Median earnings: \$18,632 Per capita: \$24,702	Median earnings: \$18,760 Per capita: \$25,179	Median earnings: \$19,610 Per capita: \$25,540
Population to workforce ratio (16 yrs+) ¹	55,045 to 38,606 (70.1%)	55,922 to 38,998 (69.7%)	56,630 to 38,838 (68.6%)	57,748 to 38,748 (67.1%)
Dollars allocated to business attraction and retention	Business Retention & Expansion: \$98,687 Business Attraction: \$157,008 Business Incubator: \$267,563	Business Retention & Expansion: \$97,550 Business Attraction: \$129,629 Business Incubator: \$267,563 Business Accelerator: \$241,320	Business Retention and Expansion: \$104,943 Business Attraction: \$155,221 Business Incubator: \$317,563 Business Accelerator: \$233,820	Business Retention and Expansion: \$107,068 Business Attraction: \$249,846 Business Incubator: \$317,563 Business Accelerator: \$233,820
Total visitors per year	4 million	4.6 million	4.8 million	4.9 million

¹These numbers are per the American Community Survey's 5-year estimates and are one year behind (e.g., 2018 numbers are actually the 2017 5-year estimate). Median earnings are for population 16 years and over with any earnings.

2019 Percent of Households in Income Bracket



The pie-chart numbers are per the American Community Survey's 5-year estimate table DPO3 for the city of Flagstaff.

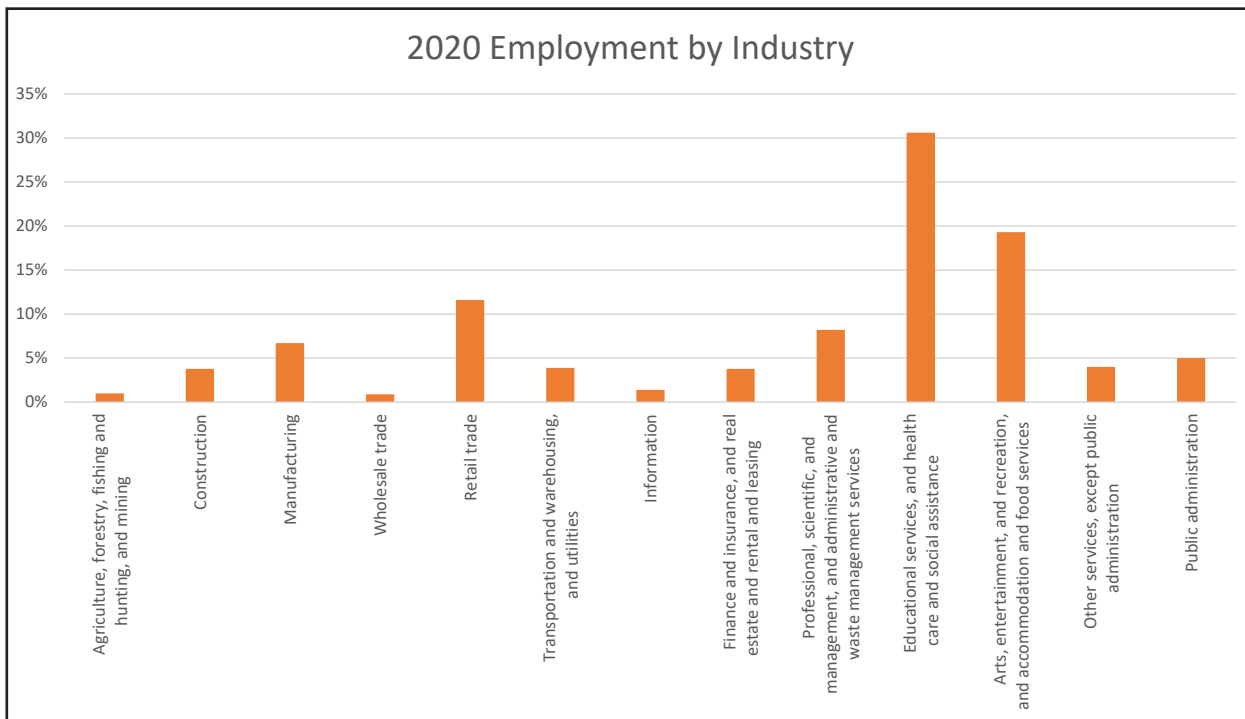
2018	2019	2020	Trend
Median earnings: \$19,115 Per capita: \$25,738	Median earnings: \$20,158 Per capita: \$26,285	Median Earnings: \$20,928 Per Capita \$26,954	→
58,626 to 39,600 (67.5%)	59,837 to 39,944 (66.7%)	61,035 to 40,605 (66.5%)	→
Business Retention & Expansion: \$115,161 Business Attraction: \$254,886 Business Incubator: \$264,005 Business Accelerator: \$230,884	Business Retention & Expansion: \$121,178 Business Attraction: \$219,565 Business Incubator: \$252,005 Business Accelerator: \$230,884	Business Retention & Expansion: \$177,381 Business Attraction: \$195,457 Business Incubator: 302,005 Business Accelerator: \$230,884	→
5.5 million	5.3 million	4.25 million	→

Overall, Flagstaff's earnings and income statistics are trending upward. However, the increase is small and median earnings have not kept pace with inflation. The cumulative inflation rate over the reporting period is 9 percent. If median earnings had kept pace with inflation it would have reached \$21,335 for 2020 (2019 calendar year). Per-capita income has kept pace with inflation, however, according to the Federal Reserve Economic Data program (FRED), real per-capita income (CPI-adjusted to a base year) has declined in Flagstaff since 2018, indicating that although incomes are increasing nominally, purchasing power has decreased.

Flagstaff's workforce population is hovering near 70 percent but has slightly decreased over the seven-year reporting period. This may partly be the result of NAU students accounting for a

large share of the overall population growth and their lower labor participation rate. This is also an area that the COVID-19 pandemic has likely impacted. Because ACS data is a year delayed, any impacts on unemployment and labor force participation are not present in the reported data. National indicators suggest that unemployment likely increased in 2020 and labor force participation decreased. Historical trends also indicate that drops in labor force participation may take time to rebound.

Visitor numbers have remained high but decreased slightly from their record highs in 2018 and 2019. It is likely that part of the decrease is due to the global pandemic in 2020 and decreased travel. Education and healthcare-related industries (see below) like Northern Arizona University and Flagstaff Medical Center are the largest industries, making up 30 percent of the employment base. The entertainment and service industry is the next largest industry, making up 20 percent of the employment base.



Numbers are per the American Community Survey's 5-year estimate table S2404 for the city of Flagstaff.

HUMAN ENVIRONMENT

RECREATION				
Measure	2014	2015	2016	2017
Acres added to the Parks system	26 new 735 total	0 new 735 total	31 new 766 total	0 new 766 total
Dollars allocated to parks and recreation venues	FY15: Parks: \$3,230,736 Recreation: \$3,289,748	FY16: Parks: \$3,371,232 Recreation: \$3,310,670	FY17: Parks: \$3,545,505 Recreation: \$3,391,443	FY18: Parks: \$3,806,340 Recreation: \$3,871,089

Programming of recreational events and activities:

Due to the COVID-19 pandemic, many recreational facilities and events were forced to close or change operational procedures and programming. The Aquaplex and Joe C. Montoya facilities maintained all partnerships that existed prior to the pandemic, but due to closures, did not provide programming to them in 2020. The facilities will continue to partner with these community organizations in the future.

- Aquaplex: The Aquaplex partners with North Country Health Care to host small business and children's health fairs. The Aquaplex also partners with agencies to provide group passes for Coconino County Juvenile Court, Guidance Center and Child & Family Support Center. Additional partnerships include: Medicare and Medicaid to offer discounted membership contracts for Silver & Fit and Silver Sneakers participants.; Southwest Behavioral Health Services to provide fitness and wellness programming for community members; and local school and sports organizations to provide gymnasium space for practices and games. Staff have made changes to group and private swim lesson plans to provide consistent content to the swimmer and to model the American Red Cross' recommendations.
- The Office of Community Events partnered with the Weatherford Hotel and Old Town Shoppes to host the New Year's Eve Pinecone Drop and Fireworks. Sponsorships with Findlay Volkswagen and Around the Mountain Pediatric Dentistry have been maintained throughout the pandemic. Staff attended the Municipal Special Event Summit in Reno, Nevada, in January of 2020 to network with professionals and attend seminars related specifically to special events. Staff managed a social media team to provide content for users as the pandemic continued.
- Hal Jensen and Siler Homes Recreation Centers: Hal Jensen Recreation center as well as the Siler Homes Activity center were both closed for the majority of 2020. Staff looks forward to working with partners in 2021 to provide much needed programs and services to the community.
- Jay Lively Activity Center: The Jay Lively Activity Center reopened in October of 2020 and was able to offer skating time to local Youth and Adult Hockey and Figure Skating organizations with limited capacity and time due to the pandemic.
- Joe C. Montoya Community and Senior Center: The Joe C. Montoya Community and Senior Center continues to partner strongly with NAU and looks forward to reestablishing programs and services for the aging population of Flagstaff and the region. Staff works closely with the School of Nursing by serving as an assigned component of their program. Each semester, two groups of 3-4 nursing students are assigned to the Center for a 5-week rotation, learning how to better communicate and become more comfortable with older populations. Students not only immerse in the Center's programs, but they also provide a program to the City's patrons and are graded on that by their instructor.
- Other NAU partnerships: Physical Therapy students conduct balance assessments each year. The Psychology Department has a grad student working closely with City staff to develop early interventions for people starting to suffer from dementia. Audiology students conduct hearing screenings each year. Dental screenings are also conducted each year. The Sociology Department sends students each year to conduct surveys and interviews. The Kayettes (service group) hosts an annual Thanksgiving Dinner for patrons. Other service groups such as Greek Life groups partner on an activity or event to satisfy their "service" obligation.

2018	2019	2020	Trend
0 new 766 total	0 new 766 total	0 new 766 total	→
FY19 Parks: \$4,162,701 Recreation: \$3,945,739	FY20 Parks: \$4,494,992 Recreation: \$4,099,344	FY21 Parks: \$3,572,023 Recreation: \$4,051,973	→

Over the seven-year reporting time period, 57 acres were added to the City’s park system. However, additions only occurred in two of the seven years, and no new land was added in 2020. Recreation dollars decreased in 2020 compared to 2018 and 2019. The higher levels of funding in 2018 and 2019 included parks and recreation capital projects funded with one-time dollars from the City’s Bed, Board and Beverage (BBB) tax fund. Funded projects included the renovation of locker rooms at the Aquaplex and new permanent restrooms at Buffalo Park.

Part of the funding decrease in 2020 was due to COVID-19 and the City’s recession plan. In the initial 2020 capital budget for parks and recreation, significant funding was allocated to establish a new west side park. However, as the City closed down in response to COVID-19, BBB revenue dropped and the City’s recession plan mandated that those funds be returned.



New restrooms at Buffalo Park

MISSING METRICS - HUMAN ENVIRONMENT:
Median wage of new companies attracted or started in the last year.

MOST CITED REGIONAL PLAN GOALS IN CITY STAFF REPORTS

Goals from all 15 chapters of the Plan (71 out of 75 goals) were cited in staff reports in 2020. Community Development cited a total of 275 goals; Public Works cited 26 goals; Management Services cited 17; Fire cited 37; Police cited 10; Water Services cited 33; and Administration cited 65. Below are the top eight most cited goals in staff reports to City Council between January 2020 and December 2020. Goals not cited in any staff reports were: CC.6, LU.14, ED.5, and ED.9.

- **Goal WR.5.** (Cited 20 times) Manage watersheds and stormwater to address flooding concerns, water quality, environmental protections, and rainwater harvesting.
- **Goal E&C.3.** (Cited 19 times) Strengthen community and natural environment resiliency through climate adaptation efforts.
- **Goal E&C.2.** (Cited 17 times) Reduce greenhouse gas emissions.
- **Goal PF.3.** (Cited 17 times) Provide high-quality emergency response and public safety services including law enforcement, fire, medical, and ambulance transport service.
- **Goal E&C.6.** (Cited 16 times) Protect, restore and improve ecosystem health and maintain native plant and animal community diversity across all land ownerships in the Flagstaff region.
- **Goal T.2.** (Cited 15 times) Improve transportation safety and efficiency for all modes.
- **Goal NH.1.** (Cited 15 times) Foster and maintain healthy and diverse urban, suburban, and rural neighborhoods in the Flagstaff region.
- **Goal E&C.4.** (Cited 13 times) Integrate available science into policies governing the use and conservation of Flagstaff's natural resources.

The most cited goal of 2020 dealt with a number of water issues, including flooding and stormwater, water quality, and environmental protections. This is largely due to the Rio de Flag Flood Control Project which is working towards mitigating flood risk in various Flagstaff communities. The City's Capital Improvements Project Team provided monthly project updates to City Council throughout 2020. Key milestones for the project in 2020 include project design completion and planning for real estate acquisition. As of the project's most recent update in May 2021, the City is in the process of purchasing the property necessary to begin construction. The other most cited goals in the Natural and Built Environment centered around climate adaptation and mitigation, and emergency response/public safety.

REGIONAL PLAN ACCOMPLISHMENTS

The Regional Plan is a living, working plan that serves as a guiding policy document for the City of Flagstaff. Its implementation depends on the ability to keep the Plan flexible and current, the actions of the City Council and staff, and community investment from the private and public sector, among many factors. Not every Plan implementation accomplishment is easily measurable. This section describes the work of the Comprehensive Planning program and other City staff, which the metrics do not capture.

Specific Plan Adoption and Implementation

On September 1, 2020, the Southside Community Specific Plan was adopted unanimously by the Flagstaff City Council. It was also unanimously endorsed by the Stakeholder Group convened by the Southside Community Association. The project was chosen by the International Association for Public Participation's national and international Core Values Award as the Project of the Year. Implementation of the Southside Community Specific Plan is underway.

The Engineering Division has been working with the La Plaza Vieja Neighborhood Association to design traffic calming and pedestrian improvements for the Clay Avenue corridor, per their neighborhood specific plan (adopted in 2015). One-hundred percent plans have been completed and approved and the project is awaiting additional funding due to the increase in construction costs post-pandemic.

In 2020, City Staff implemented several elements of the High Occupancy Housing Specific Plan (adopted in 2018), including:

- Replaced the Rooming and Boarding land use with new High Occupancy Housing land uses that require the approval of a Conditional Use Permit. These new land uses are based on the physical characteristics of the buildings and development.

- Added a bedroom density maximum for determining if a development is High Occupancy Housing.
- Limited High Occupancy Housing development with four units or greater to activity centers.
- Required High Occupancy Housing to be within 1320 feet of a transit stop. The Planning and Zoning Commission may approve a greater distance in accordance with specific findings.
- Incorporated a pilot program to allow reduced parking requirements for a High Occupancy Housing that provides transit passes to residents and employees.
- Incorporated requirements for a High Occupancy Housing development that contains more than 50 dwelling units per acre to be located in the pedestrian shed of a regional activity center.
- Revised the parking requirements for a High Occupancy Housing development to be based on the number of bedrooms.

OTHER ACCOMPLISHMENTS

The Arizona Department of Transportation worked in partnership with the City, NAU, NAIPTA, and Coconino County to develop Master Plans for Milton Road and US 180, two Great Streets identified in the Regional Plan. The Plans are nearing completion and will provide a lasting vision for the corridor.

In 2020, the City Council called for the establishment of an Indigenous Commission to serve as an advisory board to City Council on Indigenous issues and intergovernmental relationships. The Commission consists of seven voting members appointed by the City Council and three ex-officio (non-voting) members from the Indigenous Peoples Advisory Council, also appointed by the City Council. The first Indigenous Commission meeting took place in January 2021. Current tribal representation on the Commission includes Hopi, Yavapai-Apache, Eastern Shawnee, and Navajo.

Flagstaff City Council and City leadership also made further commitments to Indigenous peoples by creating and hiring the Coordinator for Indigenous Initiatives, a full-time permanent employee within the City of Flagstaff. The Coordinator serves as the staff liaison for the Indigenous Commission as well as the contact point for concerns/topics for Indigenous communities and neighboring Indigenous nations. Going forward, the Commission and Coordinator will serve as an important resource to ensure that Indigenous voices and concerns are heard in City decision-making.

FUTURE PLANNING PROJECTS

Future Amendments and Update Preparation

The Sustainability staff has proposed a major plan amendment to bring Chapter IV of the Flagstaff Regional Plan 2030 in alignment with the recently adopted Flagstaff Carbon Neutrality Plan, which calls for the City to be carbon neutral by 2030.

The comprehensive update of the Flagstaff Regional Plan 2030 will begin in September 2021. A public participation plan was endorsed by the City Council and the Coconino County Board of Supervisors in spring 2021. During the Regional Plan update, evaluation papers on over 20 topics will be prepared and vetted by City and County boards and commissions in place of a 2021 annual report in the format that has been presented from 2015 to 2021.

Ongoing Planning Efforts

In 2018, the City began work on the J.W. Powell Public Facilities and Services Specific Plan, which will provide a strategy for accomplishing the Regional Plan goals for the development of the land between Lone Tree Road and Fourth Street south of I-40 through the provision of water services, transportation, public safety, parks and recreation, open space, and other public services. Comprehensive Planning staff is working with Capital Engineering to determine how Phase II of the JWP Boulevard Specific Plan will be completed. It may be a separate project or may be rolled into the Regional Plan update.

In Fiscal Year 2019, the City Council approved a new Neighborhood Planner/Heritage Preservation Officer position in the Comprehensive Planning Program. Staff had hoped to work on the Pine Knoll-Brannen Neighborhood Plan. This neighborhood will be impacted by the future expansion of Lone Tree and the neighborhood planning effort will coordinate with those transportation planning efforts. However, that work has been delayed due to the COVID-19 pandemic and the position has been focused on improving the efficacy of the Heritage Preservation Program and reinventory of the Southside National Register Historic District to include the Civil Rights Era history and properties.

Northern Arizona Healthcare has applied to amend the Regional Plan and create a specific plan for activity center S16 (near Ft. Tuthill County Park). The amendment proposes to upgrade the area to a Regional Activity Center, move the centroid, and replace and reorganize the surrounding area types to create a health care village with a Level I Trauma Center at the heart. The amendment and specific plan will also address changes to the internal and regional transportation system and multimodal objectives.

City staff continue to work on an Active Transportation Master Plan. The plan will amend the Flagstaff Regional Plan to include a more comprehensive set of bicycle and pedestrian facilities, including bikeways and protected bike lanes, and will provide for the systematic implementation of these facilities. Additionally, it lays out goals, policies, and best practices for active transportation infrastructure development.

FLAGSTAFF
REGIONAL PLAN
2030
PLACE MATTERS

WWW.FLAGSTAFFMATTERS.COM

If you have questions, please contact:

Sara Dechter, AICP, CP3
Comprehensive Planning Manager
City of Flagstaff
211 West Aspen Avenue
Flagstaff, AZ 86001

(928) 213-2631
SDechter@flagstaffaz.gov



Cover Photograph by Alex Wood, other photographs by City Staff unless otherwise noted in caption