

The logo for WALH, consisting of the letters 'WALH' in a bold, sans-serif font, set against a light blue background with a white cloud pattern.

WESTERN ALBUQUERQUE LAND HOLDINGS, LLC

A semi-transparent white box containing the title 'SANTOLINA LEVEL A MASTER PLAN' in a large, serif font, with the date 'AUGUST 26, 2013' in a smaller, sans-serif font below it. The background of the slide is a wide, flat landscape of tall grasses and yellow wildflowers under a bright blue sky with scattered white clouds.

**BERNALILLO COUNTY PLANNING COMMISSION  
LAND USE HEARING  
JANUARY 2014**

The logo for SANTOLINA, featuring a stylized white leaf or drop shape to the left of the word 'SANTOLINA' in a bold, sans-serif font, all contained within a dark purple rectangular box.

# JANUARY 29, 2014

## COUNTY PLANNING COMMISSION HEARING

1. Speaker Introductions
2. Neighborhood Outreach
3. Why Here? Why Now?
4. The Planned Communities Criteria
5. Economics
6. Sustainability & Land Use Framework
7. Santolina Land Use and Zoning
8. Conclusion
9. Next Steps

# WALH

WESTERN ALBUQUERQUE LAND HOLDINGS LLC

## PROJECT DEVELOPMENT TEAM:

Garrett Development Corporation

Bohannon Huston Inc.

SEC Planning, LLC

Consensus Planning, Inc.

David Taussig & Associates

# NEIGHBORHOOD OUTREACH

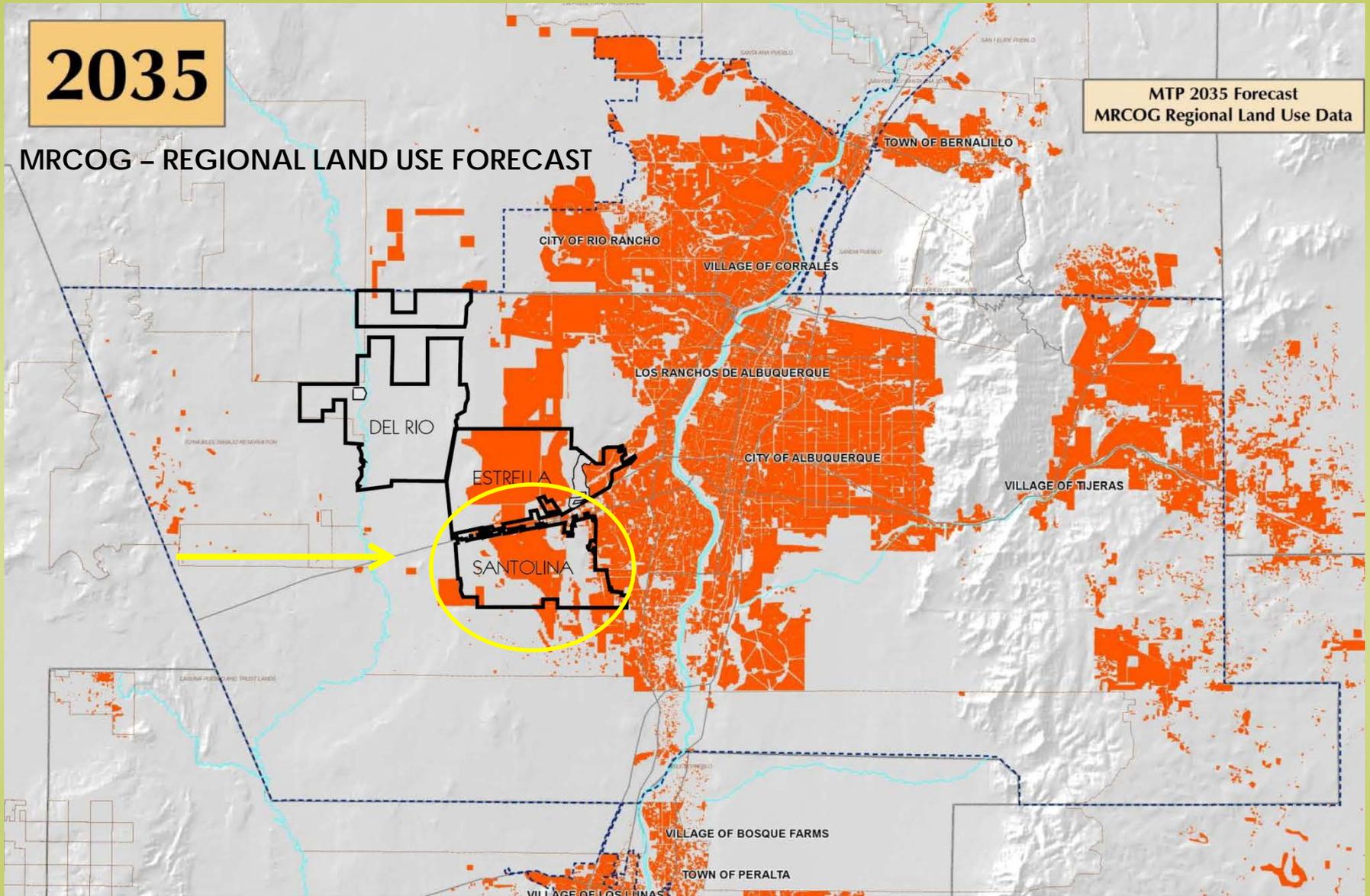
1. Santolina Level A Master Plan Public Open House
2. Meeting with the South Valley neighborhood and association leaders
3. Presentation and meeting with the Pajarito Village Neighborhood Association
4. Presentation to Ciudad Soil and Water Conservation District

# WHY HERE? WHY NOW?

**2035**

**MRCOG - REGIONAL LAND USE FORECAST**

**MTP 2035 Forecast  
MRCOG Regional Land Use Data**



# TOP TEN REASONS TO MASTER PLAN

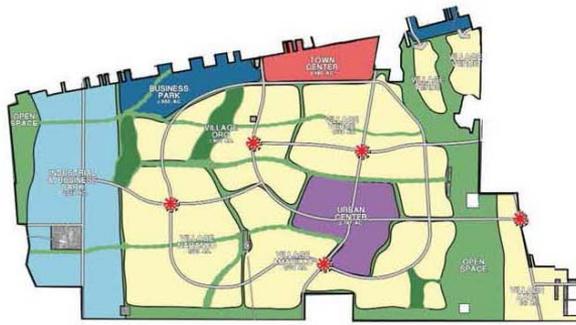
1. Plan for Growth, Not Piecemeal
2. Jobs/Economic Development
3. Balances Land Uses – Long Term
4. Protect the Natural Environment
5. Efficient Use of Resources – Systems Thinking
6. Quality Control – Sets Standards
7. Convenient Access to Daily Needs
8. Recreational Amenities – Parks, Trails, Complete Streets
9. Predictability Attracts Investment
10. Safety

# PLANNED COMMUNITIES CRITERIA

## ILLUSTRATIVE LEVELS OF PLANS

### \* LEVEL A

- 7,000 -14,000 Acres (typ.)
- Arterial Roadways
- Open Space Network
- Village Areas/General Land Use
- Infrastructure System Planning



\* Must be approved prior to Level B.

### ★ LEVEL B

- 500-3,000 Acres (typ.)
- Land Use/Zoning/Civic Uses
- Local/Collector Streets
- Parks
- Open Space/Trails
- Infrastructure Planning
- Preliminary Development Phasing



★ Must be approved prior to Level C.

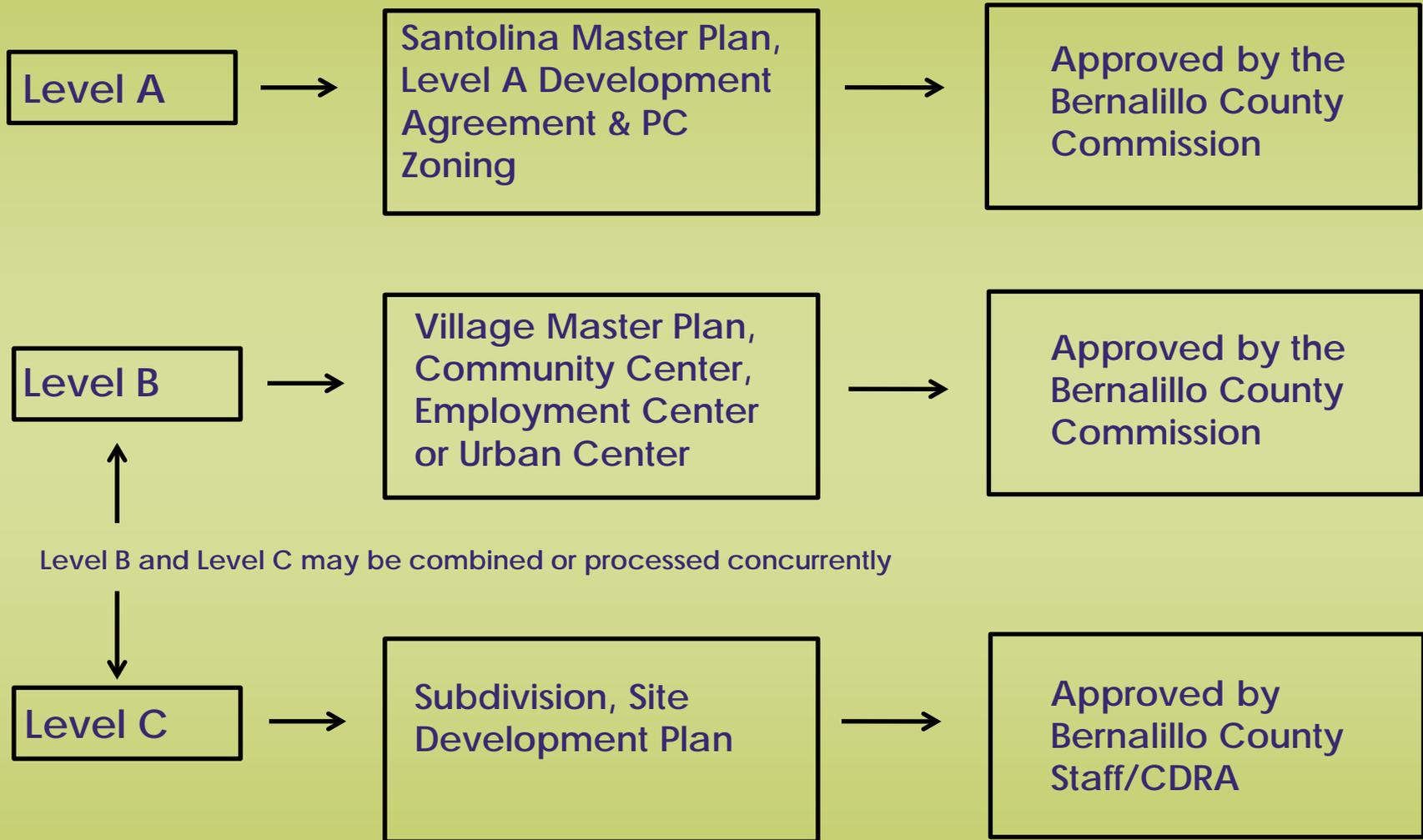
### ⊙ LEVEL C

- 1-100 Acres (typ.)
- Site Plan/Subdivision Plat
- Local Streets
- Lots and/or Building Footprint
- Height, Setbacks, FAR, etc.
- Final Infrastructure Plans



⊙ Must be approved prior to construction.

# PLANNED COMMUNITIES CRITERIA



# PLANNED COMMUNITIES CRITERIA

LAND USE	ACREAGE	% OF PLAN AREA
Village (including Village Centers)	6,626	48%
Industrial & Business Park	2,059	15%
Open Space	3,158	23%
Urban Center	787	6%
Business Park	676	5%
Town Center	480	3%
<b>TOTAL</b>	<b>13,786</b>	<b>100%</b>

# COUNTY OF BERNALILLO

## PLANNING COMMITTEE PRESENTATION SANTOLINA MASTER PLAN

JANUARY 29, 2014

**DTA** DAVID TAUSSIG  
& ASSOCIATES



# INTRODUCTION – DAVID TAUSSIG & ASSOCIATES

- Incorporated in 1985
- Public Finance and Urban Economics Consulting
  - Specializing in infrastructure and public services finance
  - 70%+ of Clients are public agencies
- Consulting services provided to virtually every urban county and major city in California, as well as dozens of public agencies in Texas, New Mexico, Washington, etc.
- Implemented over 1,500 public financing programs
- Performed over 450 fiscal and economic impact studies in multiple states
- Nathan Perez – Vice President, Attorney
  - 100+ Fiscal/Economic Studies

# WHAT IS A FISCAL IMPACT STUDY?

## The August 22, 2013 Level A Santolina Fiscal & Economic Impact Study:

- Performed to satisfy the County's Planned Communities Criteria ("no net expense") and the economic model was done as an additional level of analysis beyond the required scope.
- Revenues minus Expenditures. Fiscal model reflects the estimated recurring annual deficit or surplus to the County's **General Fund** that will result from the development of the Project. This particular model also analyzes several Dedicated Funds.
- For every \$1.00 incurred by the County in providing County services to the Project, the County will get at least \$1.78 back in Project General Fund revenues (\$2.47 including Dedicated Fund revenues).
- Current level of detail provided is likely indicative of a Level B or C Study.
- What the Fiscal Impact Study is not (at this time):
  - Not a County Budget document
  - Not a General Fund allocation strategy or department level budget analysis
  - Not a future facilities or services funding strategy
  - Can it incorporate some of these things: **YES...** in Level B and Level C.

# WHAT IS AN ECONOMIC IMPACT STUDY?

## The August 22, 2013 Level A Santolina Fiscal & Economic Impact Study:

- The Study also identifies the general economic impacts on the County in terms of employment, gross receipts, and earnings creation for residents and workers of the County and Project.
- Incorporates two stages of the development process: construction and operations. To conduct the economic impact analysis, DTA used Version 3 of the IMPLAN economic modeling system, the nationally accepted "gold standard," and operated under the assumption that each phase has three (3) economic effects:
  - I. *Direct: Caused by the additional output of goods and services from a specific land use.*
  - II. *Indirect: Ripple effect among all of the industries whose outputs are used by the land use and its overall supply chain, e.g., the buying and selling of goods and services by suppliers to the land uses analyzed.*
  - III. *Induced: Arise when employment increases in a region and stimulates greater household spending.*

# OVERVIEW – FISCAL IMPACTS

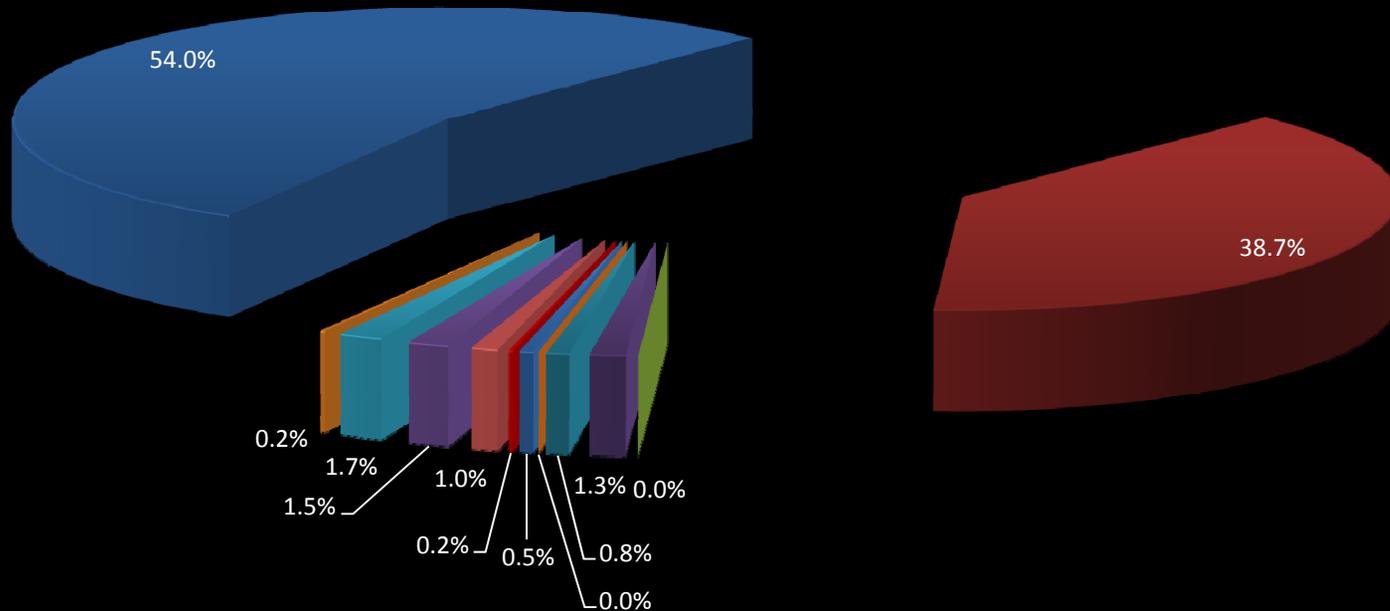
<b>(A) Fiscal Impact Category (Recurring)</b>	<b>General Fund</b>	<b>General Fund + Dedicated Funds</b>
Total Annual Recurring Revenues	\$51,214,233	\$71,281,316
Total Annual Recurring Costs	(\$28,849,158)	(\$28,849,158)
<b>Total Annual Recurring Surplus/(Deficit)</b>	<b>\$22,365,075</b>	<b>\$42,432,158</b>
<i>Total Annual Revenue/Cost Ratio</i>	<i>1.78</i>	<i>2.47</i>

<b>(B) Fiscal Impact Category</b>	<b>Amount (\$)</b>
<b>Total One-Time (Construction) GRT</b>	<b>\$88,503,959</b>
General Fund	\$47,655,978
Non-General Fund	\$40,847,981

# OVERVIEW – FISCAL IMPACTS

## Recurring General Fund Revenues

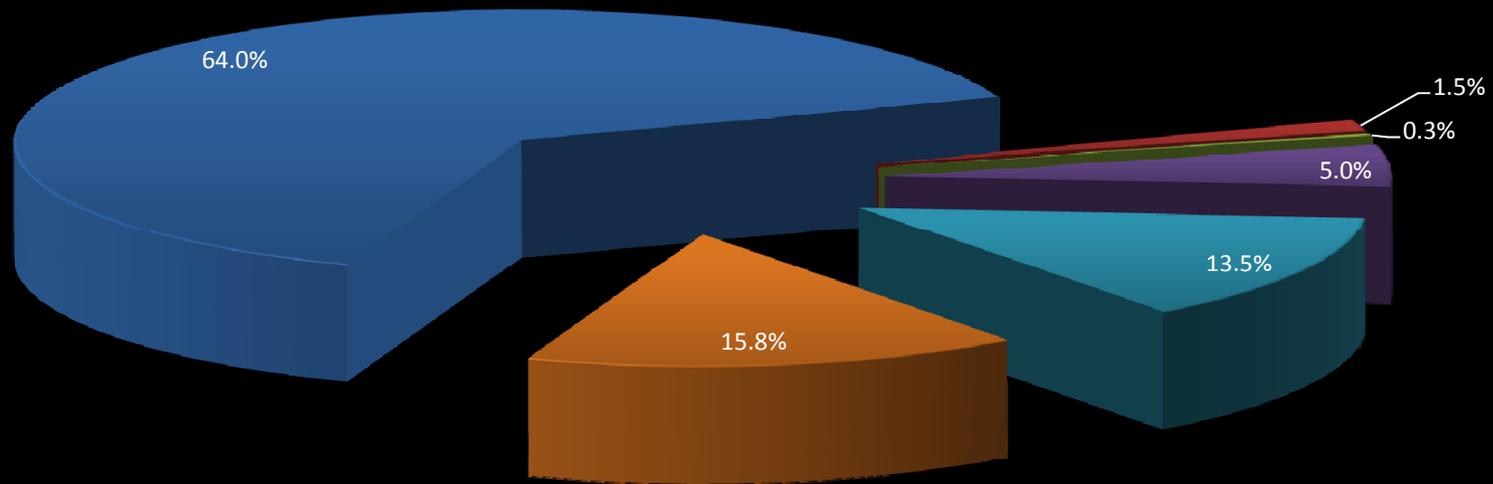
- SECURED PROPERTY TAX
- GROSS RECEIPTS TAX
- Miscellaneous Tax Revenue
- Utility Gross Receipts Tax
- Motor Vehicle
- Cigarette
- Gasoline Tax
- Intergovernmental
- Licenses and Permits
- Fees for Service
- Miscellaneous
- Investment Income



# OVERVIEW – FISCAL IMPACTS

## Recurring General Fund Expenditures

- PUBLIC SAFETY (MDC, SHERIFF, FIRE & RESCUE, ETC.)
- Health & Welfare (Environmental, Solid Waste, Social Services, etc.)
- Housing
- Culture & Recreation
- PUBLIC WORKS (FLEET/FACILITIES, O&M, PLANNING, ETC.)
- GENERAL GOVERNMENT



## DETAILS – FISCAL IMPACT

### The August 22, 2013 Level A Santolina Fiscal & Economic Impact Study:

- Parks & Open Space: includes a debit of over \$1,400,000 annually for Recreation (15-20%↑ over current budget).
- Parks & Recreation also directly receives a cut of an Open Space Property Tax Mill Levy (0.10 Mills) – currently totaling approximately \$1,300,000 annually. As applied to Santolina, this Mill Levy would generate an additional \$320,000 annually.
- The Santolina Fiscal Impact Study already includes a debit of over \$3,900,000 annually for Public Works/Fleet/Facilities/O&M (15-20%↑).
- County Public Works also directly receives a share of GRT revenues under the dedicated County Environmental Services Gross Receipts Tax (Sec. 78-43) - 1/8 of a cent. Approximately over \$1MM per year.
- The Level A Fiscal Impact Analysis debits Santolina \$5,300,000 for Public Works, Recreation, and similar. Also embedded within Santolina's Net Impact are substantial GRT and Property Tax funds that will flow directly to the departments in question.

# OVERVIEW – ECONOMIC IMPACTS

<b>(A) One-Time Impacts</b>	<b>Direct</b>	<b>Indirect/Induced</b>	<b>Total</b>
<u>Construction Employees</u>			
Countywide	85,621	64,890	150,510
Santolina Master Plan	85,621	32,445	118,066
<u>Construction Wages</u>			
Countywide	\$3,831,369,666	\$2,782,695,916	\$6,614,065,582
Santolina Master Plan	\$3,831,369,666	\$1,391,347,958	\$5,222,717,624
<u>Construction Output</u>			
Countywide	\$10,892,795,011	\$7,262,048,190	<b>\$18,119,329,405</b>
Santolina Master Plan	\$10,892,795,011	\$3,643,072,669	\$14,535,867,680

# OVERVIEW – ECONOMIC IMPACTS

<b>(B) Recurring Impacts</b>	<b>Direct</b>	<b>Indirect/Induced</b>	<b>Total</b>
<u>Employees</u>			
Countywide	75,006	40,900	<b>115,906</b>
Santolina Master Plan	75,006	20,450	95,456
<u>Employee Wages</u>			
Countywide	\$3,176,643,417	\$1,753,939,921	\$4,930,583,338
Santolina Master Plan	\$3,176,643,417	\$876,969,960	\$4,053,613,377
<u>Overall Output</u>			
Countywide	\$6,408,144,400	\$4,522,856,050	<b>\$10,931,000,450</b>
Santolina Master Plan	\$6,408,144,400	\$2,261,428,025	\$8,669,572,425

# OVERVIEW – ECONOMIC IMPACTS

<u>Jobs-Housing Balance</u>	Balance without Project	Balance with Project	% Increase /(Decrease)
Countywide	0.99	1.23	24.65%↑

<b>Other Beneficiaries (Non-Bernalillo County)</b>	<b>Amount (\$)</b>
Total One-Time (Construction) GRT – State, UNM, & School Districts, etc.	\$571,871,739
Annual GRT – State, UNM, School Districts, etc.	\$238,029,539
Annual Property Taxes – State, UNM, School Districts, etc.	\$59,007,957

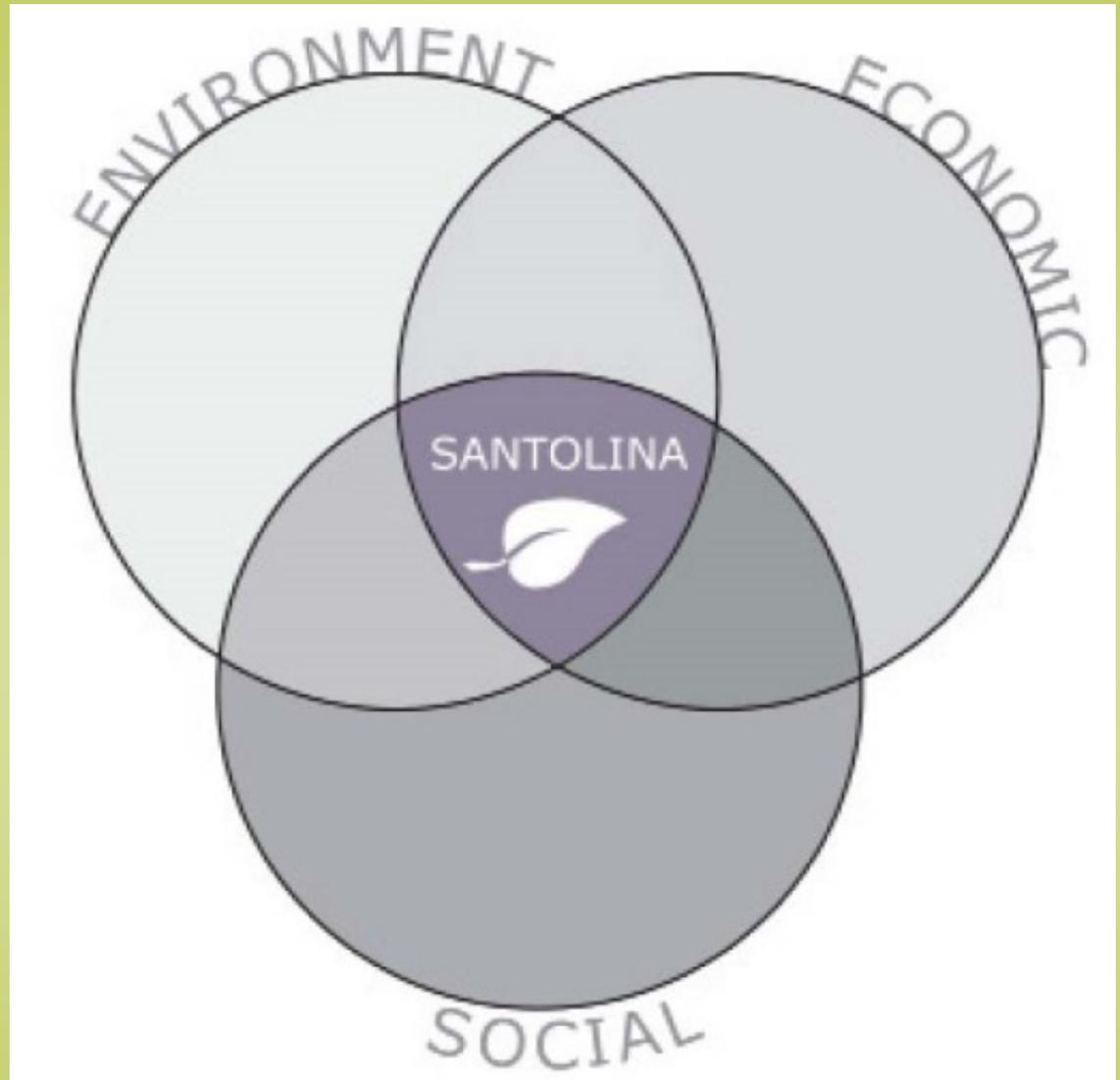
Simply put, the Santolina Master Plan will serve as an invaluable anchor for the Bernalillo County economy. As can be seen by the results of this Study, the Project will provide long term fiscal and economic benefits to the County, as well as local school districts, the University of New Mexico, the surrounding area, and the entire State of New Mexico.

# WHAT THE NUMBERS ACTUALLY MEAN...

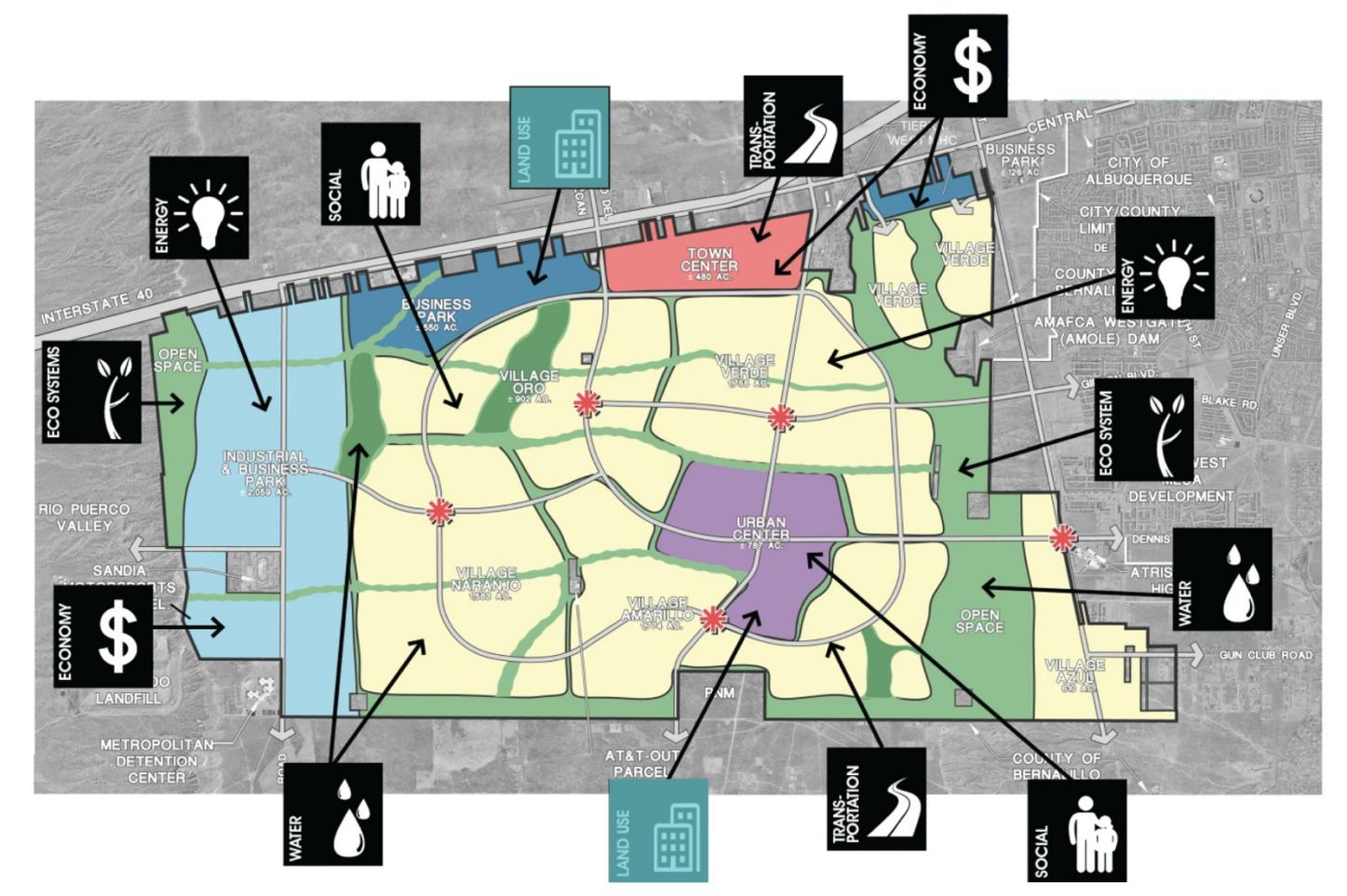
- Fiscal - "No Net Expense." And the Economic Impact Model was done as an additional layer of analysis beyond the required scope – and demonstrates: *jobs, jobs, jobs.*
- Highly unlikely that the General Fund will ever be strained by the Project. County can afford new staff to service Project from Project revenues. Levels of Service maintained, if not exceeded.
- The incredibly positive results are mostly due to two key factors (1) the scale of the Project, and (2) the tremendous amount of land dedicated to non-residential uses.
- Santolina compares favorably while utilizing conservative assumptions. For example: (1) conservatively projected property values at buildout; as well as (2) utilizing Countywide GRT averages (assumes future non-residential is no more productive than existing County non-residential).
- One-time/construction jobs will have an **immediate** and **significant** impact on the local economy, as this sector was one of the hardest hit by the Great Recession (i.e., construction, tradesmen, contractors, etc.).

# QUESTIONS & ANSWERS

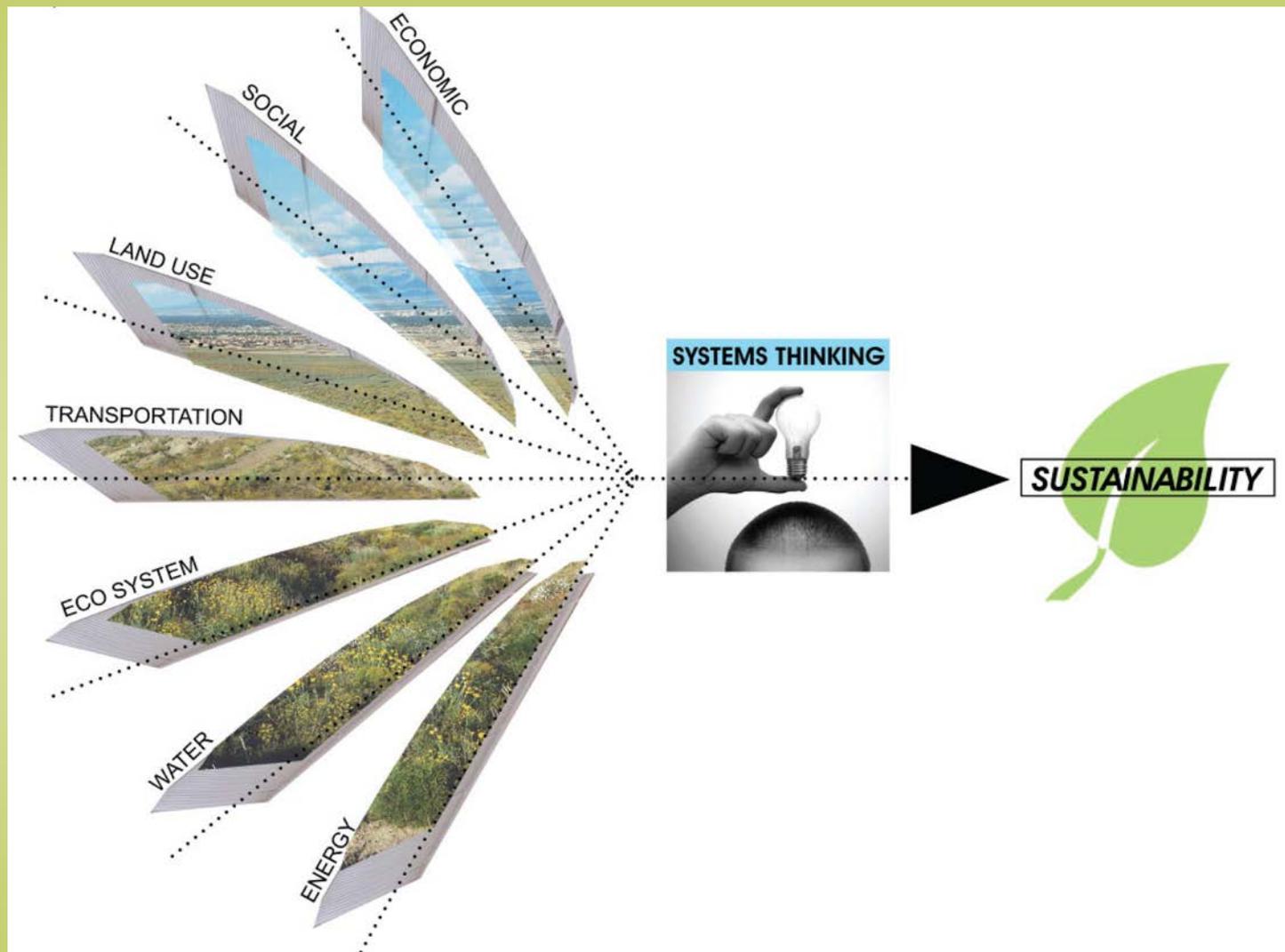
**SUSTAINABILITY:**  
Balances the  
needs of the  
present  
community with  
that of the  
future.



# SUSTAINABILITY & LAND USE FRAMEWORK



# SUSTAINABILITY & LAND USE FRAMEWORK



# LEGEND

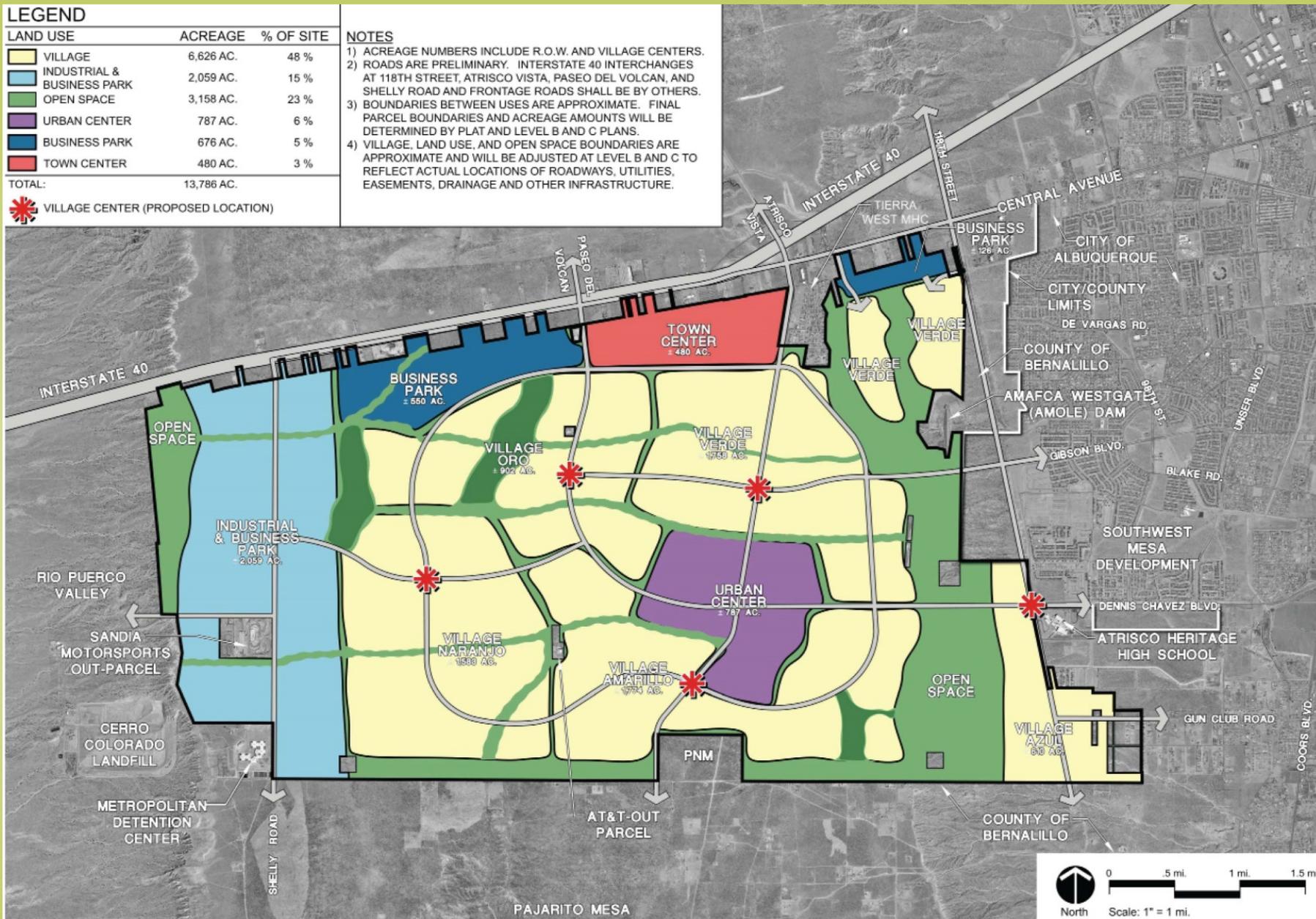
LAND USE	ACREAGE	% OF SITE
VILLAGE	6,626 AC.	48 %
INDUSTRIAL & BUSINESS PARK	2,059 AC.	15 %
OPEN SPACE	3,158 AC.	23 %
URBAN CENTER	787 AC.	6 %
BUSINESS PARK	676 AC.	5 %
TOWN CENTER	480 AC.	3 %

TOTAL: 13,786 AC.

 VILLAGE CENTER (PROPOSED LOCATION)

## NOTES

- 1) ACREAGE NUMBERS INCLUDE R.O.W. AND VILLAGE CENTERS.
- 2) ROADS ARE PRELIMINARY. INTERSTATE 40 INTERCHANGES AT 118TH STREET, ATRISCO VISTA, PASEO DEL VOLCAN, AND SHELLY ROAD AND FRONTAGE ROADS SHALL BE BY OTHERS.
- 3) BOUNDARIES BETWEEN USES ARE APPROXIMATE. FINAL PARCEL BOUNDARIES AND ACREAGE AMOUNTS WILL BE DETERMINED BY PLAT AND LEVEL B AND C PLANS.
- 4) VILLAGE, LAND USE, AND OPEN SPACE BOUNDARIES ARE APPROXIMATE AND WILL BE ADJUSTED AT LEVEL B AND C TO REFLECT ACTUAL LOCATIONS OF ROADWAYS, UTILITIES, EASEMENTS, DRAINAGE AND OTHER INFRASTRUCTURE.



# SANTOLINA LEVEL A LAND USE

- Market Trends
- Community Design Principles
- Transportation System
- Phasing Strategy

# SANTOLINA PLANNED COMMUNITIES ZONE

## Components:

- 1) Land Use Districts – intent and broad permissive uses.
- 2) Site Characteristics – contextual development intensity. Character and intensity is based on street hierarchy.
- 3) Design Standards – contains the elements that will be customized within each Level B plan in order to create distinct places with unique character.

# RESPONSE TO LAND USE AND ZONING COMMENTS

## ZONING

- Additional permissive and conditional uses
- The Open Space Land Use District - combination of public and private open space.
- Density
- Zoning Framework

# RESPONSE TO LAND USE AND ZONING COMMENTS

Comp Plan Area Designation	Allowable Density	Acreage	Allowable Units	Percentage of Master Plan Area
Reserve	3.0 du/ac	1,124	33,372	81%
Rural	1.0 du/ac	1,968	1,968	14%
Semi-Urban	3.0 du/ac	440	1,320	3%
Developing Urban	5.0 du/ac	254	1,270	2%
MASTER PLAN AREA TOTAL	2.8 DU/AC	13,786	37,930	100%

# RESPONSE TO LAND USE AND ZONING COMMENTS

## *LEVEL OF DETAIL*

- PCC Tiered Level of Planning
- Sense of Place & Identity
- Archaeological Study
- Population and Growth Studies

# RESPONSE TO LAND USE AND ZONING COMMENTS

## *ADJACENT LAND AND OUTPARCELS*

- Compatibility of Use
- Access
- PNM Future Generation Site

# RESPONSE TO LAND USE AND ZONING COMMENTS

## *PHASING*

- Level B Plans
- Access, existing development, market conditions, utilities and infrastructure, and economic development.
- Jobs/Housing Balance
- Large scale planning

# RESPONSE TO LAND USE AND ZONING COMMENTS

## *LAND USE MIX*

- Major Public Open Space and Open Space
- Location of the Urban Center

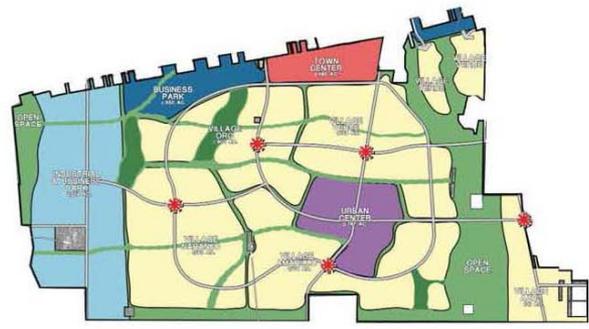
# RESPONSE TO LAND USE AND ZONING COMMENTS

## *DEVELOPMENT AGREEMENT*

- Funding Strategy
- Review and Approval Process

# \* LEVEL A

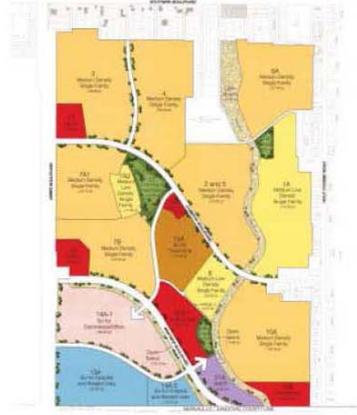
- 7,000 -14,000 Acres (typ.)
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# ★ LEVEL B

- 500-3,000 Acres (typ.)
- Land Use/Zoning/Civic Uses
- Local/Collector Streets
- Parks
- Open Space/Trails
- Infrastructure Planning
- Preliminary Development Phasing



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# ⊙ LEVEL C

- 1-100 Acres (typ.)
- Site Plan/Subdivision Plat
- Local Streets
- Lots and/or Building Footprint
- Height, Setbacks, FAR, etc.
- Final Infrastructure Plans



⊙ Must be approved prior to construction.

We look forward to discussion and continuing to work together to create a cohesive, sustainable, successful, master planned community for Bernalillo County.

## NEXT STEPS...

- February – Presentation at the Westside Coalition Neighborhood Meeting (date to be determined)
- March 26, CPC Hearing Number 4 - Transportation
- Santolina Team will meet with the departments and agencies and will submit a letter in response to all written comments prior to the next hearing
- May 28, CPC Hearing Number 5 – Environment and Open Space
- July 30, CPC Hearing Number 6 – Government and Public Services