Development Feasibility Analysis

Examining Constraints and Opportunities to Housing Development in
Four Unincorporated San Diego County Communities:
Buena Creek, Valle de Oro/Casa de Oro, Lakeside, and Spring Valley

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01. EXECUTIVE SUMMARY

In early 2022, the County of San Diego (County) initiated the "Development Feasibility Analysis" (DFA) as one of its many endeavors to respond to the region's housing crisis. The DFA was directed by the County Board of Supervisors (Board) as a study to identify barriers to housing development and potential solutions to support more housing. The DFA served as a pilot study to identify and validate the barriers to housing development within four unincorporated communities so that the County could better support and facilitate housing near transit, jobs, essential services, and ample supportive infrastructure such as water and sewer utilities, sidewalks, and bike lanes.

A key goal of the DFA was to identify challenges and opportunities to support housing production in unincorporated parts of Buena Creek, Valle de Oro/Casa de Oro, Lakeside, and Spring Valley, collectively referred to as "DFA areas," four vehicle miles travelled (VMT)-efficient and infill communities, each characterized as being close to neighboring incorporated cities and amenities essential to daily life, such as restaurants, grocery stores, and job centers.

Through the completion of the DFA technical analyses (e.g., financial, market, land use, and infrastructure) and stakeholder outreach, which are summarized in the body of this report, this executive summary identifies the key factors limiting housing development and strategies to remove housing barriers. The DFA includes recommendations that support healthy, balanced communities with access to community amenities such as libraries, parks, grocery stores, and supportive infrastructure. The study also included a parcel-level analysis to identify areas where housing capacity could be increased. However, stakeholder feedback emphasized the need to address key barriers before considering land use change. As a result, the final recommendations focus policy strategies and programmatic actions that were determined to have the greatest potential in addressing barriers to housing development.

The County engaged with community members, businesses, property owners, community organizations, and housing industry experts – including infill, market rate, and affordable housing developers as well as land use attorneys – to identify barriers to housing production. Through this effort, strategies were identified to address barriers to housing development and support the communities' vision for revitalization such as more access to amenities, sidewalks, bike lanes, and jobs. Throughout the engagement efforts, the County sought to both inform the public and ground truth the technical analyses by involving residents, businesses, and a broader network of industry stakeholders interested in developing housing in the County of San Diego.

Extensive stakeholder outreach was conducted to discuss the initial DFA findings, including 60 outreach events with more than 900 participants, and distributing 679 mailers and 11,573 postcards. This outreach aimed to validate the results of the technical analyses and ensure we heard community voices. Recognizing the importance of inclusive communities, the team prioritized engagement by meeting

residents where they are to facilitate meaningful participation in the project. The technical analyses evaluated infrastructure availability and capacity, market conditions, financial feasibility of various housing typologies, and land use alternatives to identify opportunities for land use changes beyond existing conditions. Key findings from the technical analyses are outlined below.

A Water and Sewer Infrastructure Analysis (Exhibit B) evaluated the availability, location, and capacity of water and sewer services within the DFA areas. The analysis assessed existing pipeline infrastructure to determine its ability to support development under current land use designations. Findings indicate that water and sewer services are generally adequate to accommodate development under the current General Plan land use designations. The analysis focused on the DFA areas, and while capacity was found to be adequate overall, improvements may be needed for individual developments. If housing densities exceed the General Plan build out assumptions, additional water and sewer upgrades would be necessary. Additionally, water and sewer services within each of the DFA areas are provided by multiple agencies, requiring coordination with various entities if infrastructure upgrades are needed.

The County's Department of Public Works (DPW) prepared an Infrastructure Gap Analysis (IGA) for the DFA areas (Exhibit B) to evaluate roadway infrastructure and identify opportunities for improvement. The IGA identified key roadways and improvements that could enhance connectivity between specific parcels and important community amenities, open spaces, and public transit within the DFA areas. DPW found that roadway infrastructure is not a major constraint to housing development in Valle de Oro/Casa de Oro, Lakeside, or Spring Valley–although there are potential opportunities in these areas to enhance multimodal connectivity and transform key roadways into vibrant community spaces (such as bike lanes and sidewalks). In Buena Creek, however, the IGA determined that substantial investments in roadway infrastructure would likely be required to support General Plan densities. Roadways near the Buena Creek Sprinter Station are impacted by peak period congestion and stoppages related to rail service, but improvements are constrained by sensitive environmental resources along Buena Creek and the need to realign the roadway to its planned configuration. Infrastructure enhancements consistent with the Mobility Element could help support future housing growth in this community.

The Market Feasibility Assessment (Exhibit C) examined housing supply and demand, housing trends, and localized demographics within the DFA areas. This informed the Financial Feasibility Analysis (Exhibit D), which evaluated various housing typologies – including single family homes, townhomes, high density stacked-flat apartments, and garden style apartments – in terms of demand, cost factors, and potential returns on investment. The analyses estimated that by 2050, the combined DFA areas have the market demand for an additional 3,478 to 5,126 dwelling units (DU). While there is some variability across communities, the Financial Feasibility Analysis generally indicated that small-lot single family homes and townhomes are the most financially feasible housing types, whereas garden-style apartments are moderately feasible, and stacked-flat apartments are not financially feasible in most DFA areas within the next 10 years. Key factors impacting housing development include construction cost, infrastructure

requirements and cost, permitting process time and cost, and the trend for home prices and rents to rise beyond what most local households can afford. If any of these factors were to change, the market and financial feasibility would change as well.

A Land Use Analysis (Exhibit E) was prepared to evaluate potential DU yields, land conditions, land constraints pertaining to housing development, and potential land use changes to increase the allowable DUs on specific vacant and underutilized parcels. Several land use alternative scenarios were evaluated, each with the goal of assessing potential DU increases to support additional housing unit capacity. The analysis estimated that under current land use designations, parcels with high redevelopment potential (including both vacant and underutilized parcels) represent a potential of 6,258 DUs across the combined DFA areas. However, underutilized parcels (parcels containing some level of existing development) are more expensive to develop than vacant parcels, further reducing the likelihood of redevelopment based on current market conditions. Considering only vacant parcels within the DFA areas, the capacity for housing is reduced to only 560 DUs. Additionally, the land use analysis found that across the DFA areas, new housing development is typically occurring at densities below what is allowable by the General Plan. Although density increases could be supported on some parcels, land use changes to support additional density is not recommended in the near term as it could artificially raise land prices, further affecting financial feasibility for housing. However, land use changes are recommended to be evaluated comprehensively as part of future Specific Plans or as part of the Sustainable Land Use Framework (Framework).

These results of the DFA analysis revealed the following key barriers to development:

1. Market conditions do not currently support development or redevelopment, as supportable sales prices in DFA areas are substantially lower than current regional market values. Housing development projects, to support the local affordability, can only support land prices below current market values.
2. Developable land is limited.
3. Regulations are complicated and the discretionary process can be costly and time-consuming for developers. VMT mitigation and standards are confusing and unclear.
4. Current development regulations (e.g., zoning standards such as setbacks, minimum lot sizes, height and building types) can prevent General Plan densities from being achieved.
5. Housing that is attainable for current residents is a challenge.
6. Coordination with external utility service providers (e.g., water, sewer) can be complex, and stormwater compliance can add significant costs to housing development.
7. Amenities such as parks, sidewalks, bike lanes, and job centers are lacking, creating barriers to housing development and hindering economic development and placemaking.

DFA Recommendations

Through the evaluation of market, financial, land use, and infrastructure conditions and in-depth stakeholder engagement regarding barriers to housing within DFA areas, eight actionable recommendations were identified. These recommendations aim to address these key barriers to development and highlight strategic opportunities that support housing production in the near and long term. These recommendations align with and expand upon the County's existing Board-directed initiatives such as the Housing Element Implementation Plan, Removing Barriers to Housing program, and the County's ongoing work to develop the Framework.

Prioritize Infrastructure Investments to Support Housing within DFA Communities. Each DFA community has unique needs for infrastructure investments. Some investments—such as sidewalks, bike lanes, parks and libraries–while not required, would increase community desirability and over time, potentially incentivizing demand for housing. Other infrastructure needs to more directly contribute to developers' investments and could remove barriers to housing, such as funding for major roadway improvements or regional stormwater infrastructure. This recommendation would evaluate opportunities to prioritize Capital Improvement Plan (CIP) funding for sidewalks, bike lanes, and other mobility improvements such as landscaped parkways and trees that align with County's Climate Action Plan (CAP) goals. Within Buena Creek, evaluating and prioritizing transportation infrastructure constraints–specifically around the Sprinter Station, in coordination with the North County Transit District and surrounding cities could reduce developer costs associated with infrastructure investments ultimately needed to support housing. Addressing infrastructure constraints strategically and in alignment with demand for housing would ensure investments are focused in ways that support housing production over the long term. While upgrades to water and sewer infrastructure are not needed in the short term to serve planned densities, these investments may be needed if densities are increased. Identifying a prioritization strategy for CIP investments can be achieved in the near-term, while overall infrastructure investments will be a long-term effort.

Advance Community Revitalization Through Workforce Development. This recommendation calls for leveraging the County's Office of Economic Development and Government Affairs to encourage new employment opportunities to support economic vitality in DFA communities to attract more investments and improve market conditions for housing. Fostering job creation, supporting small businesses, and developing opportunities for workforce development would improve local economic conditions, increase purchasing power for local residents, and uplift DFA communities.

Expand Land Availability for Housing. This recommendation calls on expanding the availability of land suitable for housing development by exploring updates to the Zoning Ordinance or other policies to facilitate housing on educational, religious, and institutional sites, in addition to surplus county land. Increasing availability of land suitable for housing and providing added flexibility for housing development on surplus county land encourages more housing construction.

Amend County Regulations to Increase Certainty and Flexibility to Maximize Housing Development. This near-term recommendation is to update zoning regulations to ensure the current General Plan's densities can be achieved. This could be done by providing more flexibility in housing regulations in areas such as setbacks, height, and housing typologies. This aligns with an existing Housing Element implementation action that would effectively reduce processing time and cost associated with a need for rezones or other discretionary actions to achieve planned densities. Ensuring development regulations allow for planned densities would provide developers with more clarity on an area's development potential. This action also recommends clarifying County VMT regulations to increase certainty for housing development.

Fast Track Housing Permitting and Boost Resources to Incentivize Housing. This recommendation calls to implement streamlining efforts at all stages of County permitting to reduce developers' cost and time in obtaining housing entitlements. This includes exploring options to expand on existing self-certification programs and shifting more permits from discretionary to ministerial. This recommendation would also boost resources and assistance to local developers to encourage unincorporated area housing production. This recommendation includes near term actions including bringing forward solutions for more housing streamlining as part of the Grading Ordinance and By-Right Housing project by 2027.

Pursue Funding to Build More Affordable Housing. This recommendation calls to identify new funding streams to increase the number of deed restricted affordable housing units on the market, which is not viable for developers without public investments. In addition to increasing the overall supply of affordable housing, adopting a local Inclusionary Housing Ordinance for the unincorporated area would support home production at a variety of affordability levels, in addition to offering a new funding stream for overall deed-restricted units through in-lieu fees.

Advocate for Legislation that Supports Housing. This recommendation calls for the County to use its legislative program to advocate for housing supportive legislation, including support for housing streamlining opportunities, funding for affordable housing, and other actions supportive of addressing the housing crisis.

Explore Targeted Planning Efforts and Specific Plans in Buena Creek, Lakeside, and Spring Valley. Through the DFA stakeholder outreach, several community specific recommendations and needs were identified. Through targeted planning efforts, such as Specific Plans, a more cohesive community vision can be defined to support community based placemaking and community identity. Targeted planning would also serve as a vehicle to explore funding mechanisms such as grants, EIFDs, CFDs, Special Assessments, LLMDs, or CDBGs to support community investments.

The technical analyses identified opportunities for infrastructure improvements and land use changes that could support growth in DFA areas, and findings from the infrastructure analysis would inform future planning efforts and investment prioritization. Similarly, potential land use changes, while not recommended in the near term, would be explored as part of future Specific Plans and/or the Framework. For more information, refer to the Recommendations section of the report.

To advance DFA recommendations, County staff submitted a Smart Growth Incentive Program (SGIP) Cycle 6 grant application in spring 2025 to pursue funding for the creation of a Buena Creek Specific Plan. This application builds on DFA findings by proposing a comprehensive vision for land use, mobility, equity, and housing production around the Sprinter station. In addition, to support funding for community revitalization and investments within the Casa de Oro Specific Plan, the County facilitated a Business Improvement District Survey to gauge the need and level of interest in pursuing financing and maintenance district options to support improvements along the Campo Road commercial corridor and surrounding community.

These initiatives illustrate how DFA recommendations are being implemented to advance community revitalization, prioritize infrastructure investments, and support housing production.

02. PROJECT OVERVIEW

Background Context

In early 2022, County of San Diego (County) staff initiated the Development Feasibility Analysis (DFA) study as part of a broader work program termed the Sustainable Land Use Framework (Framework). Engagement consisted of community and focus group meetings conducted between March 2022 and February 2023. These inputs led to the strategic selection of four areas (collectively referred to as "DFA areas") for focused analysis, depicted in Figure 1, to set the stage for actionable solutions to housing development challenges in the unincorporated areas of the County of San Diego. The DFA areas, Buena Creek, Valle de Oro/Casa de Oro, Lakeside, and Spring Valley represent locations characterized by:

1) Opportunities to streamline new housing productions
2) Proximity to transit
3) Funding opportunities for infrastructure investments
4) Alignment with other County initiatives, and
5) Environmental justice considerations.[1]

Following the initial phase of outreach, County staff met with Community Planning and Sponsor Groups (CPSGs) in the fall of 2023 to introduce the DFA study scope and schedule. This outreach phase was coupled with preliminary technical analysis to identify portions of the DFA areas with significant physical constraints (e.g., steep slopes, wetlands.) to development. Phase 1 efforts provided valuable insights, identifying initial barriers to development and highlighting community needs. On December 6, 2023, (9) County staff returned to the Board with the results from Phase 1 of the DFA study. Phase 2 of the DFA commenced in winter of 2024 and is outlined in the project activities section below.

Figure 1. The four initial unincorporated DFA communities

[1] Lakeside and Spring Valley are both adjacent to Environmental Justice Communities per the County's General Plan EJ Element. Environmental Justice Communities are geographic areas that exhibit relatively high vulnerability related to pollution exposure, environmental threats, population sensitivity, and socioeconomic factors, amongst other considerations.

Project Activities

Engagement

Public engagement took place over three phases. This report focuses on the process and results of phases 2 and 3. Phase 1, which took place from summer to winter 2023, introduced the County team, provided an overview of the DFA, and gathered initial feedback on how community members would like to be engaged. Phase 2 reconnected with the public regarding the scope and purpose of the DFA project, set a shared understanding of the project context, and collected insight and information on the lived experiences of the residents, community members, and industry professionals in the DFA areas and unincorporated County. Phase 3 engagement reported technical findings, recaptured what was heard in Phase 2, and presented preliminary recommendations for feedback. Feedback from public engagement is included in Exhibit A.

Phase 2 and 3 engagement activities included:

- **Small Group Interviews** with developers, building industry professionals, community leaders, and relevant organizations.
- **Pop-Up Intercepts** reaching wide swathes of the public at existing community events, school events, and high-traffic commercial locations.
- **Listening Sessions and Focused Group Interviews** on topics of interest with specific groups and organizations, County working groups, property owners of select parcels of interest, and bordering jurisdictions.
- **Attendance at CPSG** Meetings, to provide presentations, project updates, and guided discussions at each of the four CPSGs representing DFA areas.
- **Virtual Workshops** including an Industry Workshop and a Public Workshop that involved presentations and guided discussions.
- **Meetings with Developers** included focused small group meetings and one on one interviews.

To advertise these activities, staff sent emails, provided DFA flyers in English and Spanish, coordinated with community based organizations (CBOs), County Parks, County Library, Live Well SD, utilized social media (e.g., Nextdoor, Facebook, Instagram, X)), and developed a website with a public question and answer section where the information could be accessed in various languages. Staff mailed invitations to 520 property owners of vacant and underutilized parcels within the DFA areas and sent 11,573 postcards in English and Spanish to properties within the DFA areas. Additionally, staff mailed invitation letters to 159 property owners where land use changes were being evaluated.

All engagement activities with dates and types of activity can be found in Table 3 below.

Table 3. Engagement Activities Conducted as Part of the DFA Phase 2 and Phase 3 Project		
No.	Completed Engagement Activity	Date of Activity
1	*Small Group Interview*	*March 06, 2024*
2	*Small Group Interview*	*March 06, 2024*
3	*Small Group Interview*	*March 13, 2024*
4	*Small Group Interview*	*March 14, 2024*
5	*Small Group Interview*	*March 14, 2024*
6	*Small Group Interview*	*March 25, 2024*
7	*Listening Session with the Environmental Coalition Working Group*	*April 10, 2024*
8	*Pop-Up at Casa de Oro's "Feel Good Fest"*	*April 14, 2024*
9	*Listening Session with the Farm Bureau Working Group*	*April 16, 2024*
10	*Listening Session with the Land Development Technical Working Group*	*April 17, 2024*
11	*Listening Session with the Labor Union Working Group*	*April 18, 2024*
12	*Listening Session with the Building Industry Association Working Group*	*April 19, 2024*
13	*Pop-Up at Buena Creek Shopping Center*	*April 25, 2024*
14	*Pop-Up at Hannalei Elementary Open House*	*April 25, 2024*
15	*Pop-Up at Lakeside's Western Day Parade*	*April 27, 2024*
16	*Pop-Up at Spring Valley Day*	*April 27, 2024*
17	*Presentation 1 at Lakeside CPG*	*May 01, 2024*
18	*Listening Session with Targeted Property Owners (invite only)*	*May 13, 2024*
19	*Listening Session with Targeted Property Owners (invite only)*	*May 15, 2024*
20	*Presentation 1 at Twin Oaks CSG*	*May 15, 2024*

Table 3. Engagement Activities Conducted as Part of the DFA Phase 2 and Phase 3 Project		
No.	Completed Engagement Activity	Date of Activity
21	*Listening Session with Targeted Property Owners (invite only)*	*May 17, 2024*
22	*Listening Session with City of San Marcos*	*May 28, 2024*
23	*Presentation 1 at Spring Valley CPG*	*May 28, 2024*
24	*Listening Session with City of Santee*	*May 30, 2024*
25	*Listening Session with the City of Vista*	*May 31, 2024*
26	*Listening Session with City of La Mesa*	*June 4, 2024*
27	*Listening Session with City of El Cajon*	*June 4, 2024*
28	*Presentation 2 at Valle de Oro CPG*	*July 09, 2024*
29	*Presentation 2 at Spring Valley CPG*	*July 09, 2024*
30	*Spring Valley Food Pantry Event at Spring Valley Library*	*July 11, 2024*
31	*Community Climate Conversations*	*July 15, 2024*
32	*Presentation 2 at Twin Oaks CSG*	*July 17, 2024*
33	*North County Food Bank Produce + Pantry Distribution at Vista Library*	*July 18, 2024*
34	*Community Climate Conversations*	*July 18, 2024*
35	*North County Food Bank – Vista Library*	*July 18, 2024*
36	*Listening Session with the Land Development Technical Working Group*	*July 18, 2024*
37	*Listening Session with the Building Industry Association*	*July 19, 2024*
38	*Listening Session with the Environmental Coalition*	*July 19, 2024*
39	*Adult Laser Tag at Lakeside Library*	*July 19, 2024*
40	*Bluegrass Concert at Casa de Oro Library*	*July 23, 2024*

Table 3. Engagement Activities Conducted as Part of the DFA Phase 2 and Phase 3 Project		
No.	Completed Engagement Activity	Date of Activity
41	*Fire Board of Directors*	*July 24, 2024*
42	*Joseph's Store Food Pantry at Spring Valley Church*	*July 25, 2024*
43	*Casa de Oro Food Pantry Event*	*July 25, 2024*
44	*Listening Session with the Labor Union*	*July 30, 2024*
45	*Casa de Oro Alliance Meeting*	*August 25, 2024*
46	*Listening Session with the Farm Bureau*	*September 3, 2024*
47	*Presentation 2 at Lakeside CPG*	*September 4, 2024*
48	*San Diego Regional Chamber of Commerce*	*September 17, 2024*
49	*Industry Workshop*	*September 17, 2024*
50	*Community Workshop*	*September 24, 2024*
51	*Casa de Oro Alliance Meeting*	*October 10, 2024*
52	*Community Based Transportation Community Workshop*	*October 15, 2024*
53	*Developer Meetings*	*December 5, 2024*
54	*Developer Meetings (2 sessions)*	*December 6, 2024*
55	*Developer Meeting*	*December 10, 2024*
56	*Land Development Technical Working Group*	*March 20, 2025*
57	*Building Industry Association*	*April 18, 2025*
58	*Farm Bureau*	*May 6, 2025*
59	*Environmental Coalition*	*May 16, 2025*

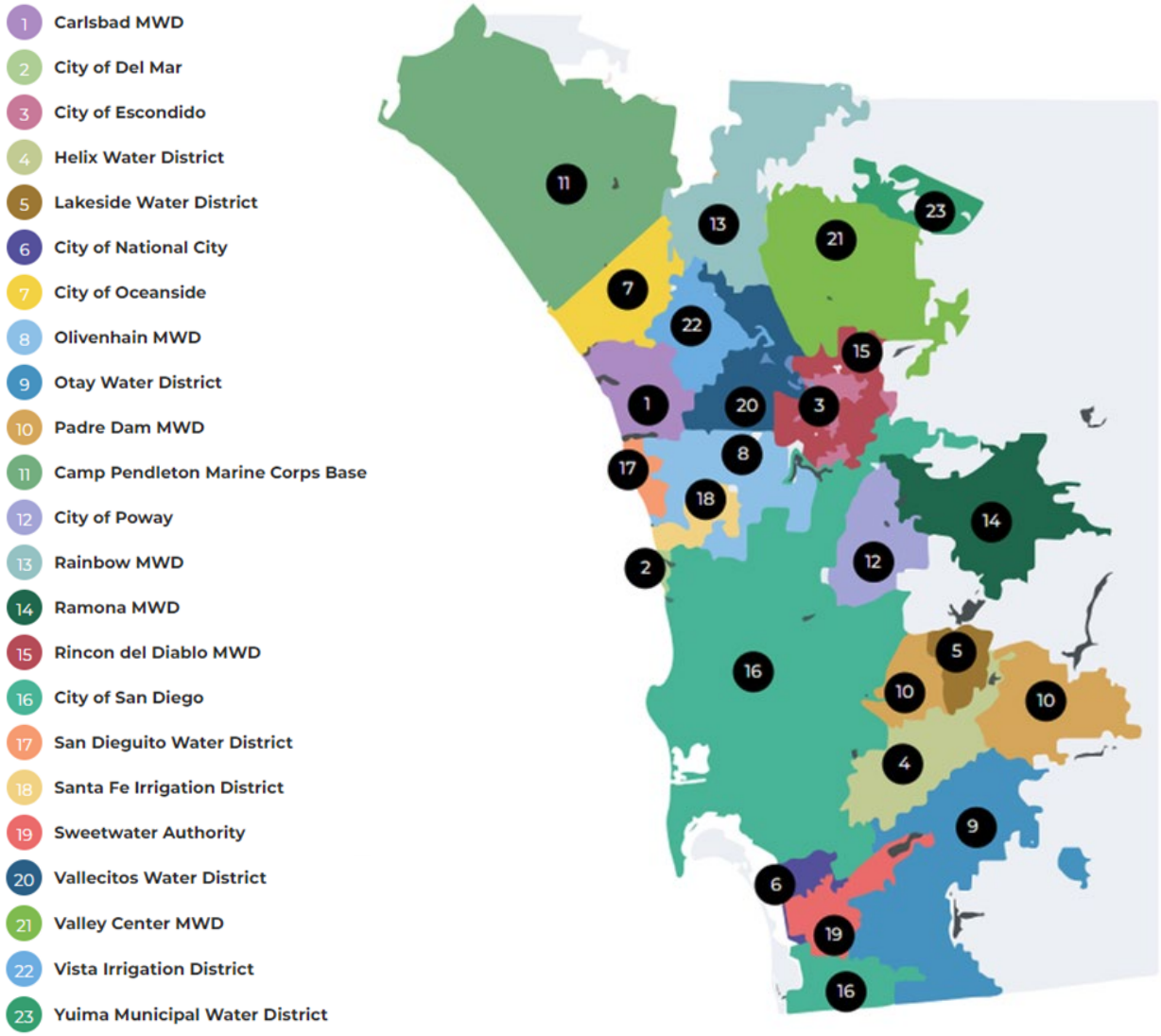
Overarching Findings

Infrastructure

Water Service Providers

The County is supplied water by the San Diego County Water Authority (SDCWA) and its member agencies, as well as independent special districts and private water systems. At the time the DFA was conducted, SDCWA had 23 member agencies (see Figure 2). As of 2024, following the completion of the DFA, the Fallbrook Public Utility District and Rainbow Municipal Water District are no longer members of the SDCWA and are now served by the Eastern Municipal Water District (EMWD). As of 2025, 22 SDCWA member agencies operated in the county, including six cities, five water districts, three irrigation districts, eight municipal water districts, and one federal agency (military base).

Figure 2. San Diego County Water Authority (SDCWA) Member Agencies as of 2023



County Water Authority (CWA) providers vary across the 4 DFA areas:

- Buena Creek is served by CWA Vista Irrigation District and CWA Vallecitos Water District.
- Valle de Oro/Casa de Oro is served by CWA Helix Water District.
- Lakeside is served by CWA Helix Water District and CWA Lakeside Water District.
- Spring Valley is served by CWA Helix Water District, CWA Otay Water District, and CWA Sweetwater Water District.

Water Service Coverage within the DFA Areas

Water infrastructure (e.g., pipelines and water mains) was found to be mostly sufficient within the DFA areas. The DFA areas are generally well supported by existing adjacent water infrastructure within public rights-of-way. See Exhibit B for more information.

Sewer Service Providers

The County of San Diego County Sanitation District provides sewer service within the majority of the DFA areas, including the communities of Spring Valley, Casa de Oro/Valle de Oro, and Lakeside. Within the Buena Creek DFA area, the Vista Sanitation District provides sewer service. See Exhibit B for more information.

Sewer Coverage within the DFA Areas

Sewer infrastructure (e.g., pipelines and sewer mains) was found to be mostly sufficient within the DFA areas. The DFA study areas are generally well supported by existing adjacent sewer infrastructure within public rights-of-way. See Exhibit B for more information.

Stormwater Infrastructure and Capacity within the DFA Areas

All new development is required to comply with stormwater management regulations. The County of San Diego Department of Public Works, Flood Control identifies planned flood control improvements in the 2023-2028 Capital Improvement Plan (CIP). The plan is updated on a rolling basis to address newly identified Public Works needs and funding sources. Funding sources may include, but are not limited to, Flood Control District funds, fees collected for Special Drainage Areas (SDAs), grants, and other sources such as the gas tax which generally supports road projects. The current CIP includes funded projects within the Lakeside and Spring Valley DFA areas[2].

Market and Financial Assessment

The following overarching findings regarding the housing development market were sourced from the Market Feasibility Assessment prepared in June 2024, as seen in Exhibit C.

[2] Current Capital Improvement Projects

The report evaluates the current and future interest in a specific property, type of property in a given location, or designated trade area. Market demand analyses provide an evaluation of current market conditions that may affect development potential for specific land uses, typically through evaluation of demographic, employment, and real estate market trends. These may include factors such as sales prices, market rents, annual absorption, vacancy rates, and planned inventory. Market studies typically present forecasts of anticipated demand for specific land uses and development typologies expressed in land area or other measurements of building area, such as square feet or units.

The following overarching findings are based on the Financial Feasibility Analysis prepared in June 2024. For more detail, including findings for specific DFA Areas, refer to the full reports included in Exhibit D.

Each residual land value model incorporated estimates of development costs, market rents/values, and target developer returns reflective of recent comparable projects and available market and industry data. Development prototypes that make financial sense generate positive residual land values which indicate that a developer or investor could acquire the site, construct the development, sell or lease the completed development, and receive at least industry standard target return on their investment.

Housing Typologies

The following housing typologies were evaluated as part of the proxy pro forma analyses for the DFA areas:

For-Sale Housing	○ Large, Medium, and Small-Lot Single Family Housing ○ Attached Townhomes
Rental Housing	○ Stacked Flats with Surface and/or Tuck-Under Parking ○ Stacked Flats with Ground Floor Commercial ○ Garden Style Apartments

Overall, townhomes make financial sense in all focus areas, and small-lot single-family housing development in Buena Creek and Lakeside. Garden style apartments make financial sense in Casa de Oro. Conversely, the study shows very weak current demand for stacked flat apartments in all areas. This may improve in the long term.

Projected Demand for Housing Units

Potential 2025-2050 housing demand is 3,478 to 5,126 dwelling units (DU) with the combined markets of all DFA areas.

Land Use

The Land Use Analysis (Exhibit E) looked at current General Plan land use designations and provided a calculation of residential DU yields based on expected construction under various land use scenarios. Parcels with high redevelopment potential (including both vacant and underutilized parcels) represent

a potential of 6,258 DUs under current land use. However, when accounting for constraints and the fact that it is less financially feasible to redevelop parcels with existing development, the potential for housing decreases. Although there is potential for units to be built, the ability to build is extremely limited. Only 560 DUs could be built under current conditions on unconstrained vacant parcels, which contrasts greatly with the anticipated market demand in the coming years. This gap between available land per the General Plan and vacant parcels and what market demand may call for can make development potential tight and bring a desire for redevelopment. However, the cost to redevelop is more expensive than it is to build on vacant land. Redevelopment must pencil out with the added expense of demolition which is unlikely in current market conditions.

Stakeholder Feedback

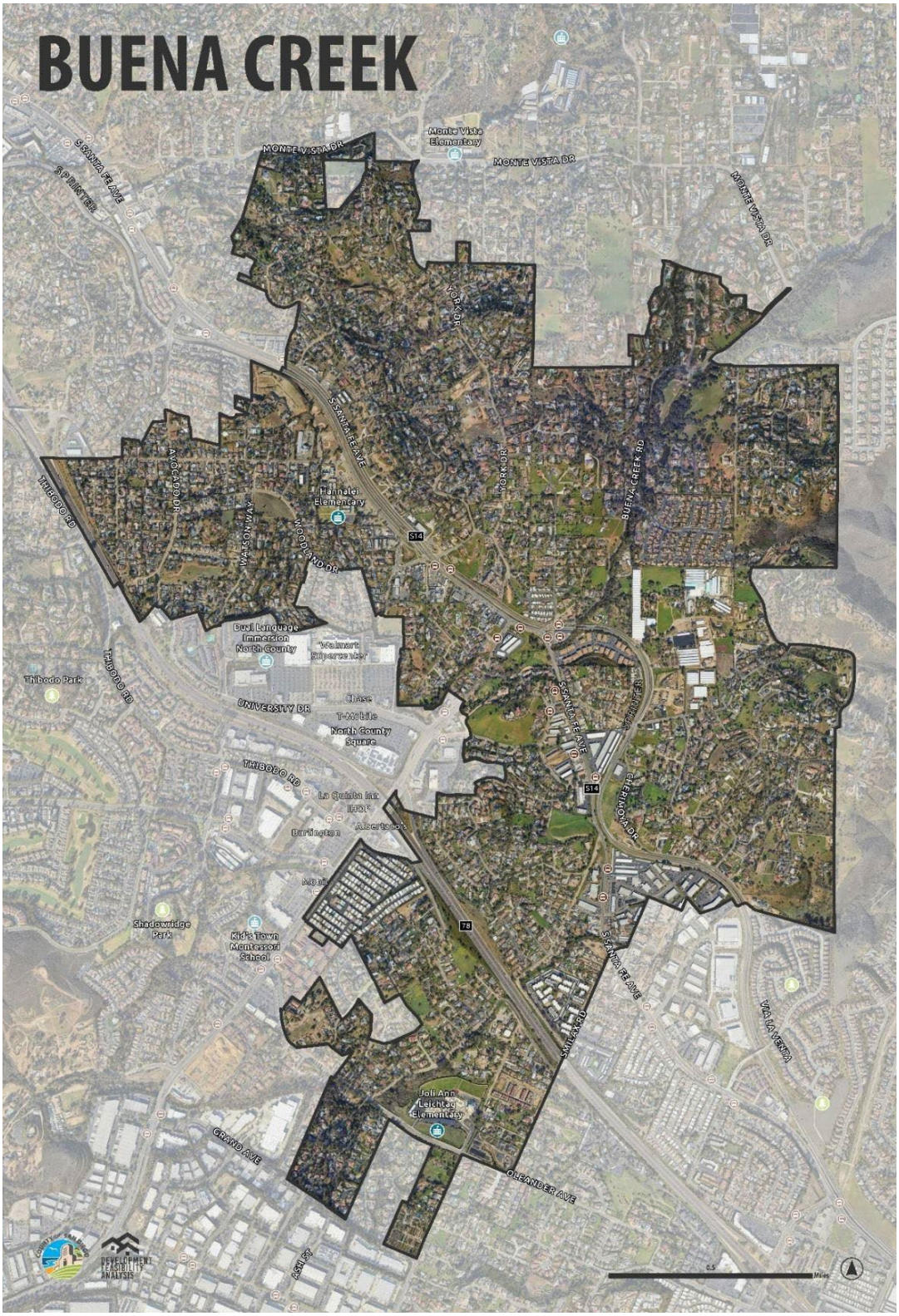
Over the course of the DFA, staff sought to understand the lived experience of residents, developers, building industry professionals, environmental and community-based organizations to understand housing needs, barriers and opportunities. It is important to note that community comments have not been individually verified and were collected in public forums with varying levels of detail. These comments may reflect lived experiences and professional experiences in unincorporated County areas beyond the DFA boundaries or may pertain to specific developer parcels or projects. Additionally, the County has embarked on many new initiatives aimed at expediting the development process; these new initiatives may not yet have impacted developers' experiences working in the County.

Input from the building industry focused on concerns about development costs, California Environmental Quality Act (CEQA) streamlining, and land use zoning. They advocated for higher housing density and suggested land assembly (combination of adjacent parcels into a larger site to make development, more feasible) and zoning strategies to facilitate townhome development. Community members expressed support for mixed-use development to foster homeownership, emphasizing the need for affordable housing that preserves the community's character. They also stressed the importance of safer, well-maintained neighborhoods, including improvements to roads with sidewalks and better transit access. Both the building industry and community members raised concerns about challenges related to homeowners and fire insurance and the capacity of essential utilities such as gas, electricity, sewer, water, and land availability. Community and Environmental organizations, underscored the need to create complete communities that address these issues in a holistic manner. A more detailed Public Engagement Summary report is attached as Exhibit A.

Buena Creek

03. BUENA CREEK

Map 1. Buena Creek DFA area



Introduction

The Buena Creek DFA area encompasses 2.52 square miles in North County San Diego, as seen in Map 1. It is adjacent to the City of Vista, has ready access to State Route 78 (SR 78), and is served by a Sprinter rail line that runs between Oceanside and Escondido, making it a unique opportunity to evaluate housing development feasibility.

Additionally, the County has successfully arranged a Memorandum of Understanding (MOU) with the North County Transit District (NCTD) to formalize collaboration on identifying future improvement projects and related grants. This action supports more timely completion of transportation projects.

Community Demographics

Demographic Overview

The Buena Creek DFA area has an estimated population of 7,708 (2023), which represents a 4% increase since 2010. As seen in Table 4, the population is generally of working age, with most residents between 15 and 64 years old (working demographic). The population is fairly distributed as seen in Map 2, except for concentrations near the Sprinter Station and along the main arterial Santa Fe Avenue.

Map 2. Buena Creek Population Density

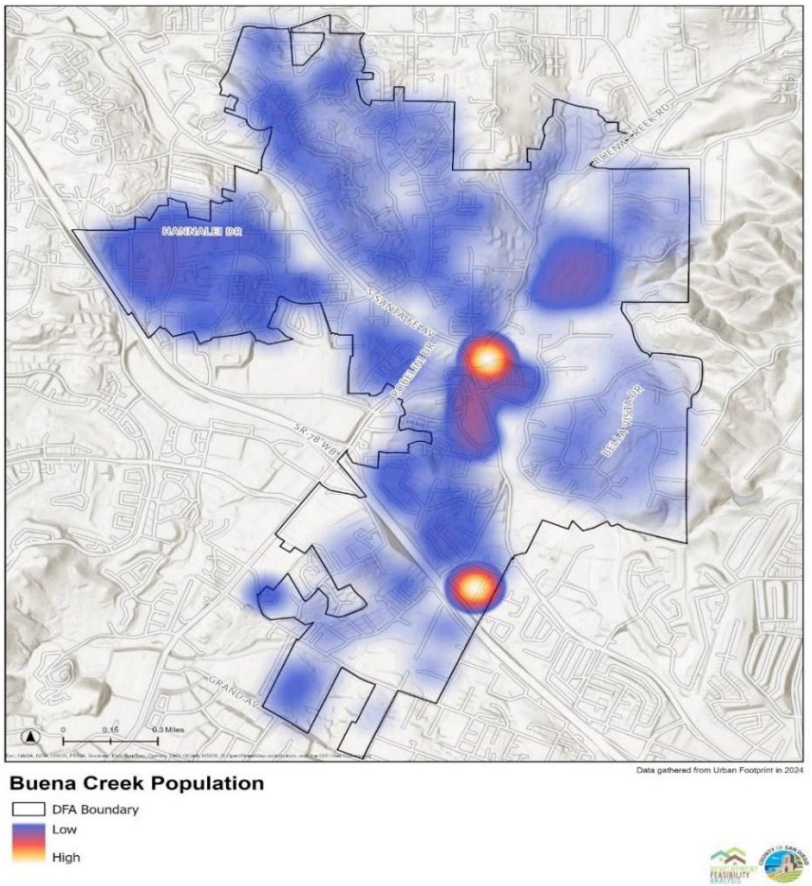


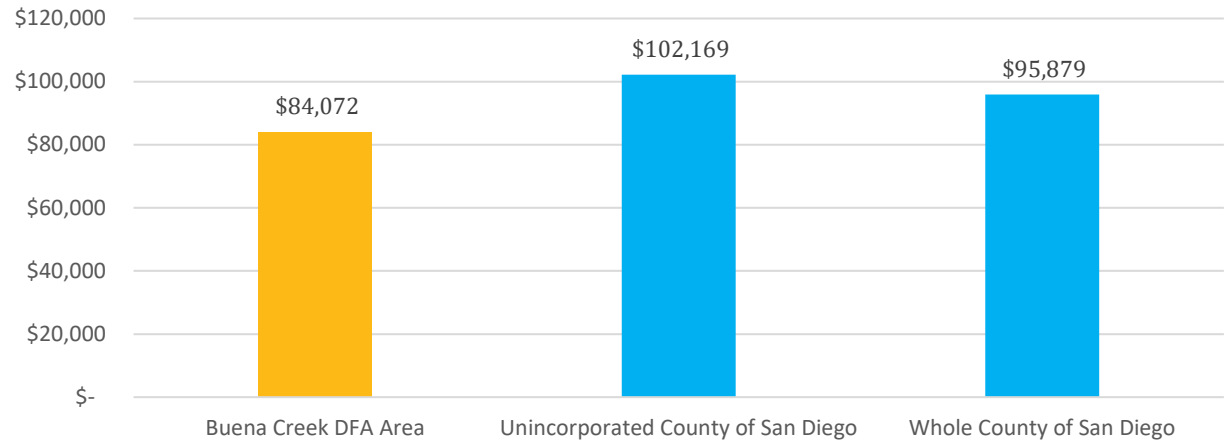
Table 4. Buena Creek Demographic Overview with comparisons (2023)			
Demographics (2023)	Buena Creek DFA area	Unincorporated County of San Diego	Whole County of San Diego
Population	7,708	519,735	3,325,714
Median Age	35.6 years	38.7 years	36.7 years
Unemployment Rate	5.7%	5.2%	4.9%
Households	2,474	167,962	1,172,259
Average Household Size	3.08	2.92	2.74
Owner-Occupied Housing Units	49.2%	65.6%	51.5%
Renter-Occupied Housing Units	45.9%	27.8	42.5%
Vacant Housing Units	4.8%	6.6%	6.1%

Source: Esri Business Analyst Online, May 2024.

Household Income Distribution

The median household income in the Buena Creek DFA area is $84,072 (2023), which is lower than the overall County of San Diego, estimated at $95,879 (2023), as seen in Figure 3.

Figure 3. Median Household Income, Buena Creek comparisons (2023)



Compared to housing pricing, income levels in Buena Creek do not support the recommended 28% of pre-tax income spent on mortgage. Buena Creek homeowners spend on average 54.3% of their pre-tax income on mortgage payments.

Community Amenities

Community amenities represent the facilities, infrastructure, and spaces that contribute to residential quality of life. They include features like restaurants, grocery stores, schools, street trees, parks, and other elements of daily necessity. The presence of these amenities, or lack thereof, can influence the demand for residential development.

The Buena Creek area has a handful of schools that support its residents:

- Monte Vista Elementary School is within Vista Unified School District. This school is slightly beyond the DFA boundary.
- Hannalei Elementary School is part of Vista Unified School District.
- Dual Language Immersion North County is a tuition-free public charter school offering dual language instruction in both English and Spanish for grades TK–8. This school is slightly beyond the DFA boundary.
- Joli Ann Leichtag Elementary School is within the San Marcos Unified School District.
- Kid's Town Montessori School serves children aged 12 months old to 6th grade. This school is slightly beyond the DFA boundary.

"SCHOOLS IN BUENA CREEK ARE FACING DECLINING ENROLLMENT, WHICH IMPACTS FUNDING AND OPERATIONS."
– COMMUNITY FEEDBACK

Buena Creek does not have any public parks. While the area's character is defined by natural landscapes, landscaped properties, and agricultural lands, the lack of dedicated park space could negatively impact residents' quality of life, particularly in terms of public health, social gathering, and recreational opportunities for both youth and adults. However, the community benefits from a bike path that runs parallel to the train route.

The Buena Creek DFA area is the only DFA area with a train stop. The Buena Creek Sprinter Station, located in the center of the study area, is served by the Sprinter Rail Line connecting Oceanside, Vista, San Marcos, and Escondido. The area is also served by NCTD bus stops, primarily along South Santa Fe Avenue and Robelini Drive. However, community members have noted that ridership on the Sprinter Rail is low, and while public transit is needed in the area, the train destinations don't fully serve residents' needs.

Additional neighborhood amenities were analyzed based on a three-mile trade ring from the center of the DFA area. The trade ring contains many schools/educational facilities, neighborhood parks/recreation, and grocery stores and pharmacies. Notably, the trade ring includes several NCTD bus stops and the Buena Creek Sprinter Station. The presence of these public transit amenities provides an

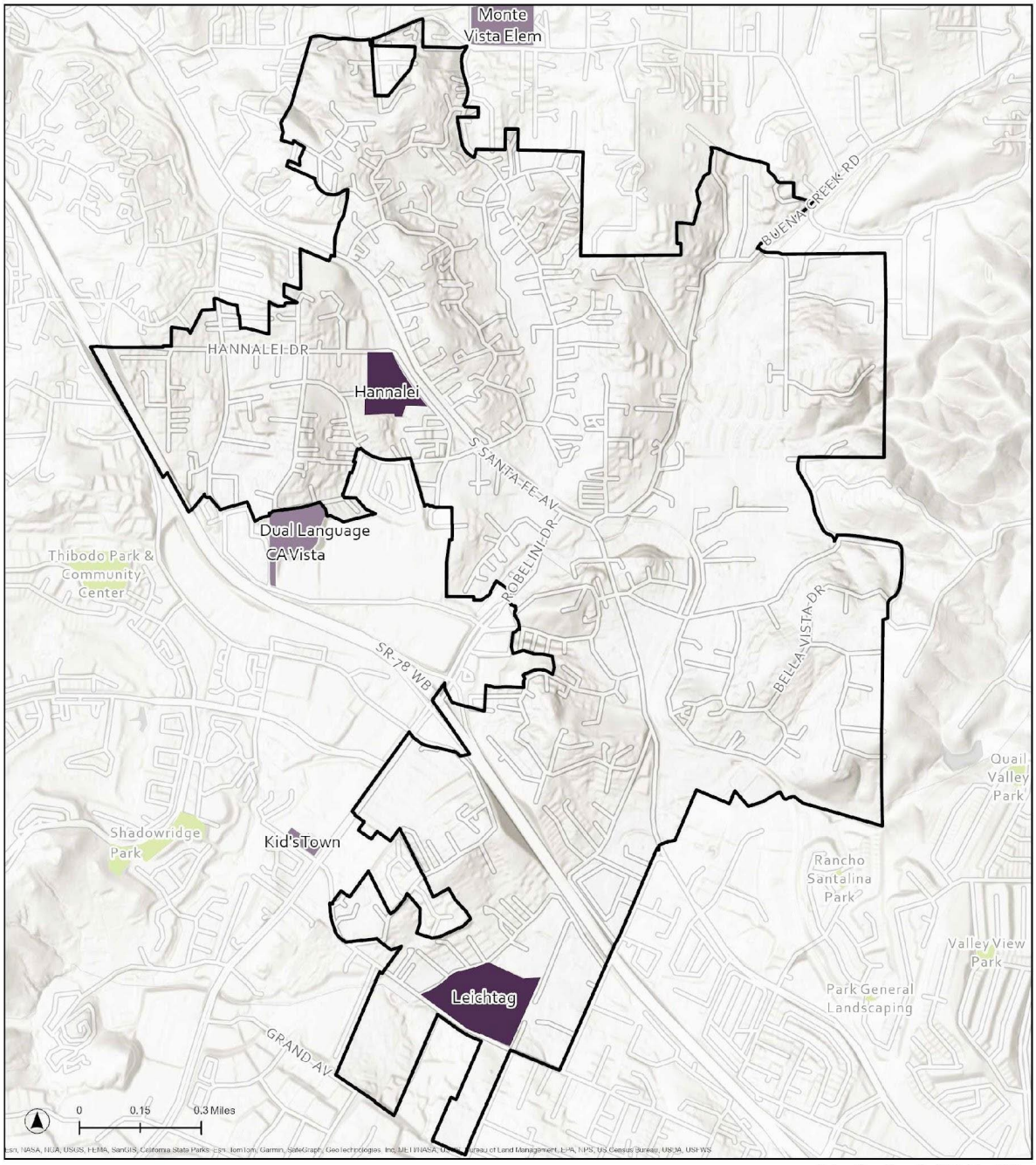
opportunity to increase transit ridership and provide additional public transit infrastructure. Although no hospitals exist within the trade ring, just beyond is the Tri City Medical Park. Additionally, the North County Square shopping center adjacent to the Buena Creek DFA area offers major retailers such as Target, Walmart, and Living Spaces. A full breakdown of amenities in the Buena Creek community can be found in Table 5 with accompanying Maps 3 and 4.

Table 5. Buena Creek Neighborhood Amenities – Trade Ring (3-miles to center of DFA area)

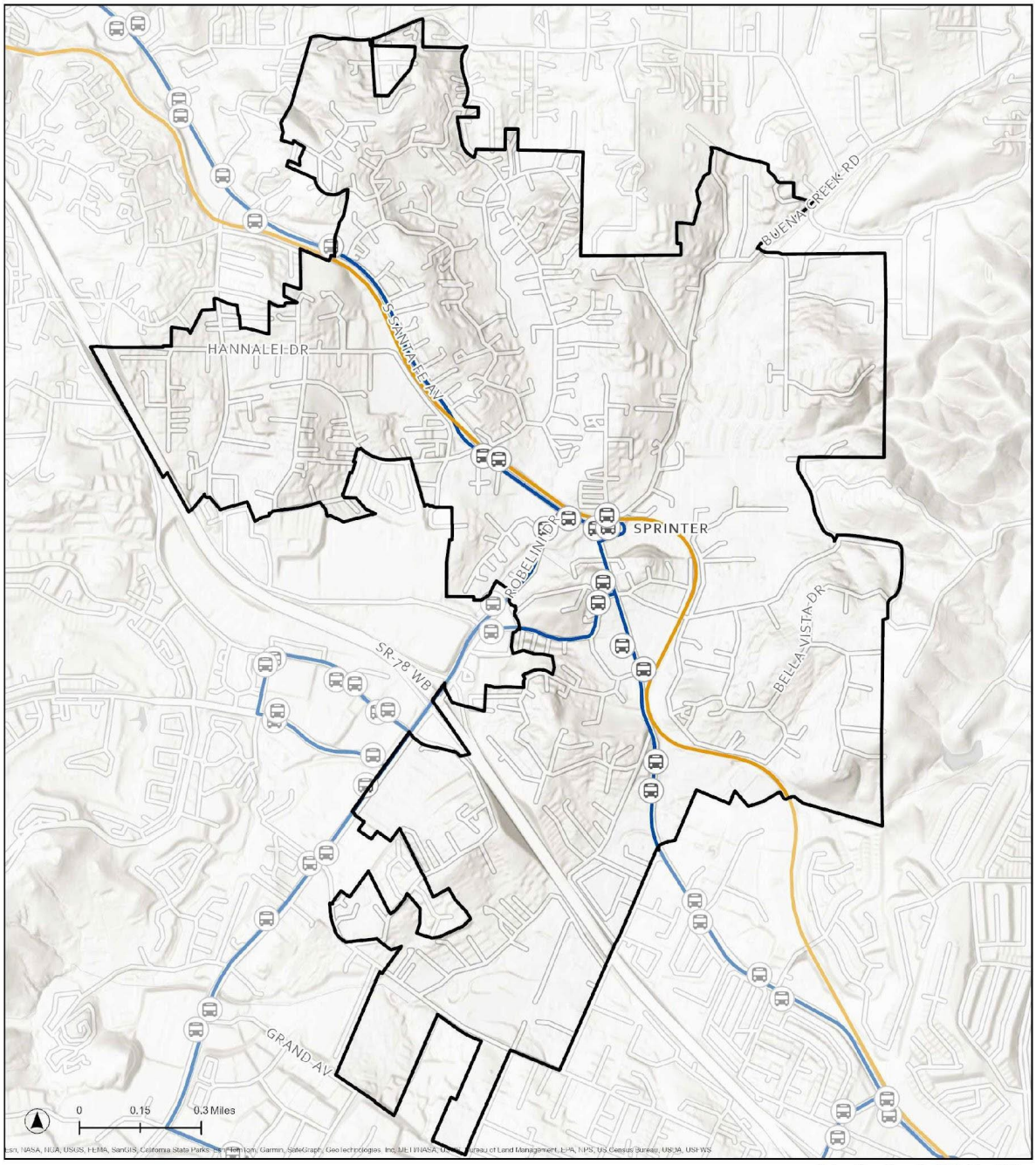
Amenity Category	Amenity
Public Transit	• Sprinter (Buena Creek Station) • North County Transit District bus stops
Schools/Educational Facilities	• Hannalei Elementary School • Monte Vista Elementary School • Beaumont Elementary School • Vista Magnet Middle School • Rancho Minerva Middle School • San Marcos Middle School • Rancho Buena High School • Vista Adult School • Palomar College
Hospital/Medical Centers	• Kaiser Permanente Vista Medical Offices • Vista Family Health Center
Neighborhood Parks/Recreation	• Inland Rail Trail — Buena Creek • Buena Vista Park • Shadow Ridge Park • Thibido Park • Pala Vista Park • Valley View Park • Quail Valley Park
Grocery Stores and Pharmacies	• Walmart Supercenter • Target Grocery • El Leon Market • Mi Ranchito Produce • Stater Bros. Markets

Source: Keyser Marston Associates (KMA)

Map 3. Buena Creek Community Amenities



Map 4. Buena Creek Transit



Data gathered from SanGIS in May 2024

Buena Creek Transit

DFA Boundary

Transit Stops

Transit Routes

Bus

Tram, Streetcar, Light rail

Current Infrastructure

Buena Creek Roadways

The Buena Creek DFA area is served by both public and private roads, as well as the Sprinter train line and bike pathway. The main north–south road, South Sante Fe Avenue, is intersected by other main thoroughfares such as Robelini Drive, leading south to Hwy 78, and Buena Creek Road, leading north.

The Department of Public Works' (DPW) Infrastructure Gap Analysis Report (Exhibit B) identified roadways that provide connections to key points of interest within the Buena Creek community and provided recommendations for road corridor transformations to improve pedestrian and bicycle infrastructure for a more vibrant community space. Recommendations are preliminary and require further analysis and assessment of constraints. The following is a summary of the recommended roadway and improvement investments in Buena Creek from the Infrastructure Gap Analysis Report:

- **Watson Way**, from Yettford Road to Hannalei Drive: enhance walkability by providing sidewalks. Additional investments include a parkway, a buffer between parking and the travel lane, and increasing the right-of-way width to 52 feet.
- **Hannalei Drive**, from Watson Way to Woodland Drive: enhance bikeability by installing a Class II bike lane along Hannalei Drive from Watson Way, connecting to the existing Class I trail along South Santa Fe Avenue. Additional investments include a parkway, a buffer between parking and the travel lane, and increasing the right-of-way width to 60 feet.
- **Woodland Drive**, from Watson Way to York Drive: enhance walkability by providing sidewalks. Additional investments include a parkway and a buffer between parking and the travel lane.
- **S. Santa Fe Avenue**, from Woodland Drive to Palmyra Drive: enhance bikeability and walkability by providing sidewalks and Class II bike lanes. Additional investments include a 14-foot median and increasing the right-of-way width to 98 feet.
- **El Valle Pulento**, from Terminus to Robelini Drive: enhance walkability by providing sidewalks. Additional investments include adding a parkway.
- **Robelini Drive**, from El Valle Pulento to S. Santa Fe Avenue: enhance bikeability and walkability by providing sidewalks and Class II and Class III bike lanes. Additional investments include increasing the right-of-way width to 122 feet.
- **Primrose Avenue (N)**, from Robelini Drive to S. Santa Fe Avenue: enhance walkability by providing sidewalks. Additional investments include a parkway and increasing the right-of-way width to 52 feet.
- **Primrose Avenue (S)**, from Lavender Lane to S. Santa Fe Avenue: enhance walkability by providing sidewalks. Additional investments include a parkway and increasing the right-of-way width to 52 feet.
- **Buena Creek Road**, from S. Santa Fe Avenue to 1000 feet north – enhance bikeability and walkability by providing sidewalks and Class II bike lanes. Additional investments include increasing the right-of-way width to 64 feet.
- **Victory Drive**, from Estrelita Drive to Terminus: enhance walkability by providing sidewalks. Additional investments include increasing the right-of-way width to 48 feet.

- **Estrelita Drive**, from S. Santa Fe Avenue to Bella Vista Drive: enhance bikeability and walkability by adding sidewalks and a Class II bike lane. Additional investments include increasing the right-of-way width to 60 feet.

For more information on the changes identified, see the Water and Sewer Infrastructure Analysis (Exhibit B). For the existing roadways, see Map 5.

Roadway infrastructure in the Buena Creek community is a constraint to achieving the higher transit-supportive densities envisioned within the community. County staff and project consultants heard from developer interviews that undersized roadways around the transit station are one of the barriers to achieving higher density development. Existing deficiencies result in substantial and costly roadway improvement requirements being placed on private development as a condition of approval. The analysis prepared as part of this DFA study can only capture current status; a full traffic study would be part of any Specific Plan or zoning changes to ensure the roadways could support higher density.

Buena Creek Water Service

Water services within the Buena Creek DFA area are largely provided by the Vista Irrigation District. The Vallecitos County Water District jurisdictional boundaries overlap with the study area, providing service to only two developed parcels. Water service consists of backbone transmission mains, with distribution mains serving areas of potential development. See Exhibit B for more information and Map 6 for existing pipes. The following are recommended water investments for Buena Creek:

- Woodland Drive may benefit from upsizing approximately 780 linear feet of water main from the existing 6" pipe to 8" PVC pipe.
- The South Santa Fe Avenue corridor and Robelini Drive area may benefit from upsizing approximately 2,600 linear feet of water main from existing 6" and 8" pipes to 10" PVC pipe. This recommendation requires additional detailed project-specific study by the Vista Irrigation District.

Buena Creek Sewer Service

Sewer services within the Buena Creek DFA area are provided by the Buena Sanitation District. Areas of development potential are either served by existing sewer mains or adjacent trunk mains. Based on input from the Buena Sanitation District, the existing sewer system has capacity that supports the current General Plan designations (prior to 2017). Capacity-deficit projects included in the 2017 Sewer Master Plan have been mostly built.

The Buena Sanitation District is in the process of updating their Sewer Master Plan in conjunction with Vista's 2050 General Plan. This will include Buena Sanitation District analysis to incorporate General Plan Amendments adopted by the County since the 2017 Sewer Master Plan, along with the impact of accessory dwelling units and density bonuses for long-term capital planning. The Sewer Master Plan

update is anticipated to be complete by January 2025. See Exhibit B for more information and Map 7 for currently existing pipes.

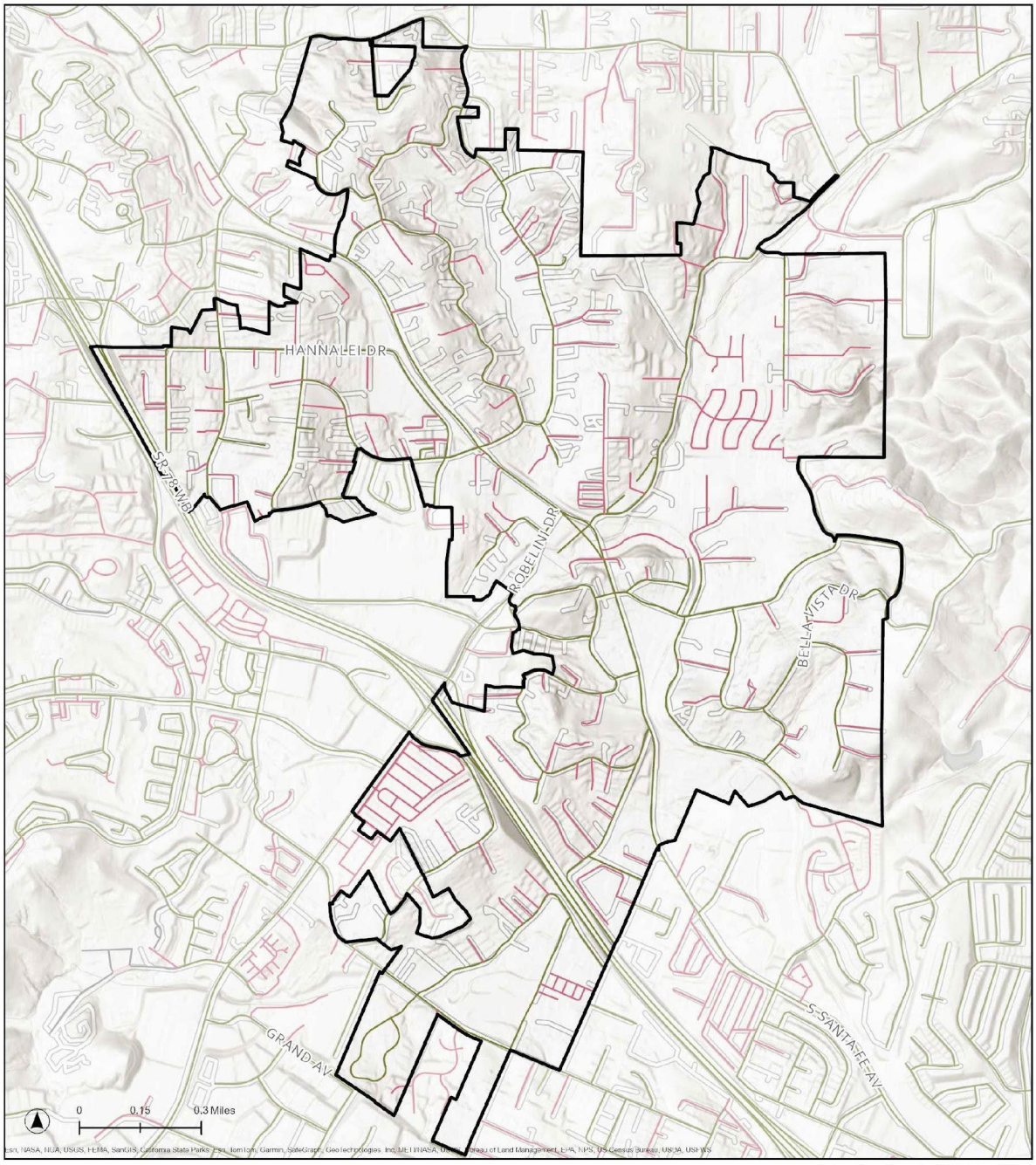
The following are recommended sewer investments for Buena Creek:

- The potential areas of land use change north of Estrelita Drive may require sewer main upsizing of approximately 4,700 linear feet of sewer main from existing 8" pipe to 12" PVC pipe. Timing would ideally match the adjacent potential development area (short-term), yet would require additional time to plan, process (crossing of existing NCTD rail), fund, and construct; and thus, would be classified as mid-to-long term. This recommendation requires additional detailed project-specific study by the Buena Sanitation District. Approximate construction cost is estimated at $6,800,000.
- As communicated by Buena Sanitation District staff to County of San Diego staff, the existing downstream capacity supports existing County General Plan designations (prior to 2017). Thus, there is a need for additional study of sewer facilities along Sycamore Avenue to Shadowridge Drive (at and outside the DFA study area) to evaluate any increase of demand proposed by potential land use changes with density exceeding current County of San Diego General Plan zoning. This recommendation requires additional detailed project-specific study by the Buena Sanitation District.

Buena Creek Stormwater Infrastructure

The Buena Creek DFA area lies within Special Drainage Area 10 (SDA-10), the North County Metro SDA. No major flood control or stormwater management facilities are currently planned within the Buena Creek DFA area, as no major deficiencies have been identified. Individual development projects are required to comply with County requirements regarding retention of stormwater runoff onsite for both flood control and stormwater quality control purposes. Also, County Ordinance No. 7 (June 24, 1991) requires the payment of drainage fees as a condition for issuing any building permit.

Map 5. Buena Creek Roads



Data gathered from SanGIS in May 2024

Buena Creek Roads

DFA Boundary

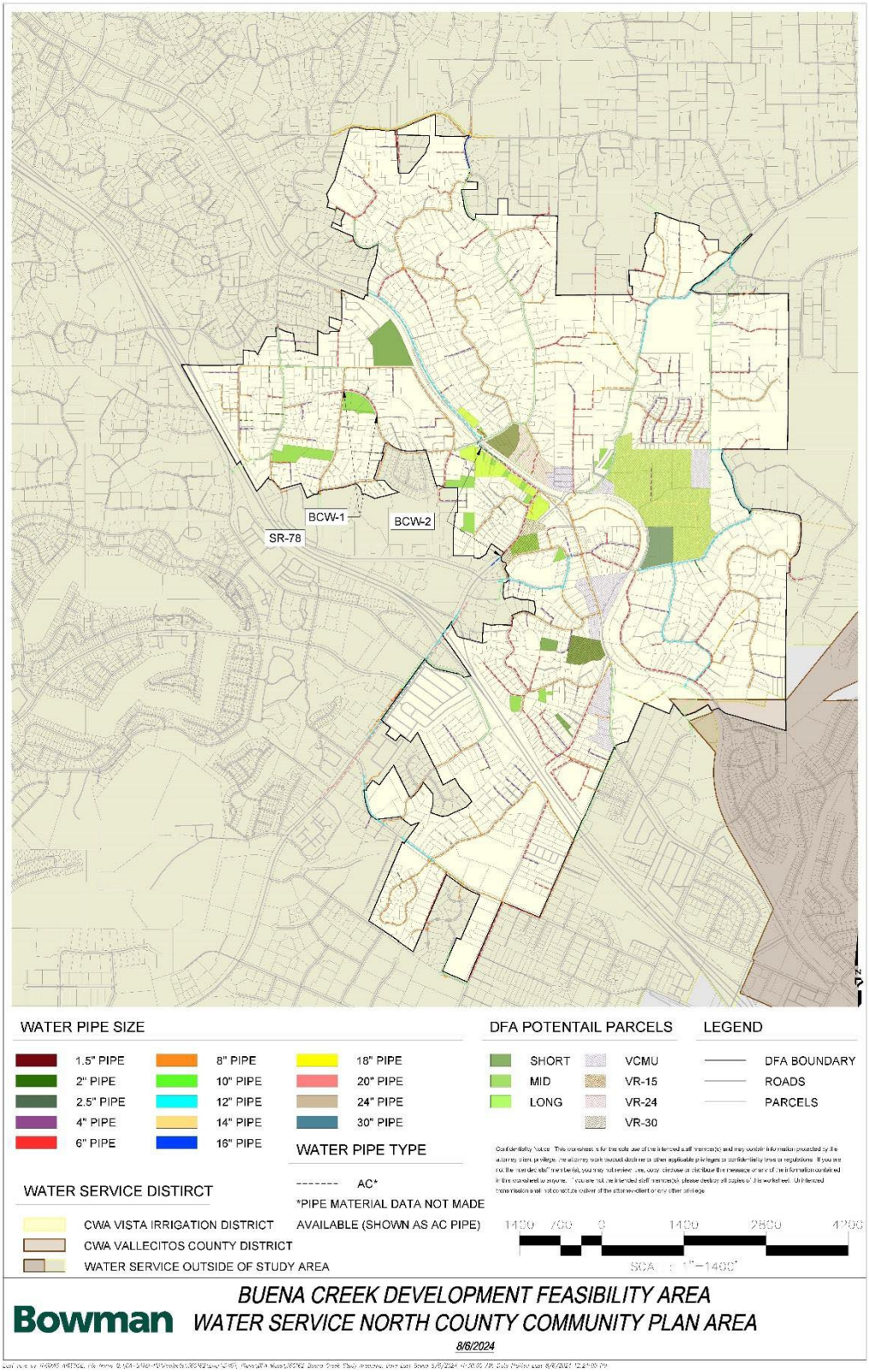
Dedicated

Offer for dedication

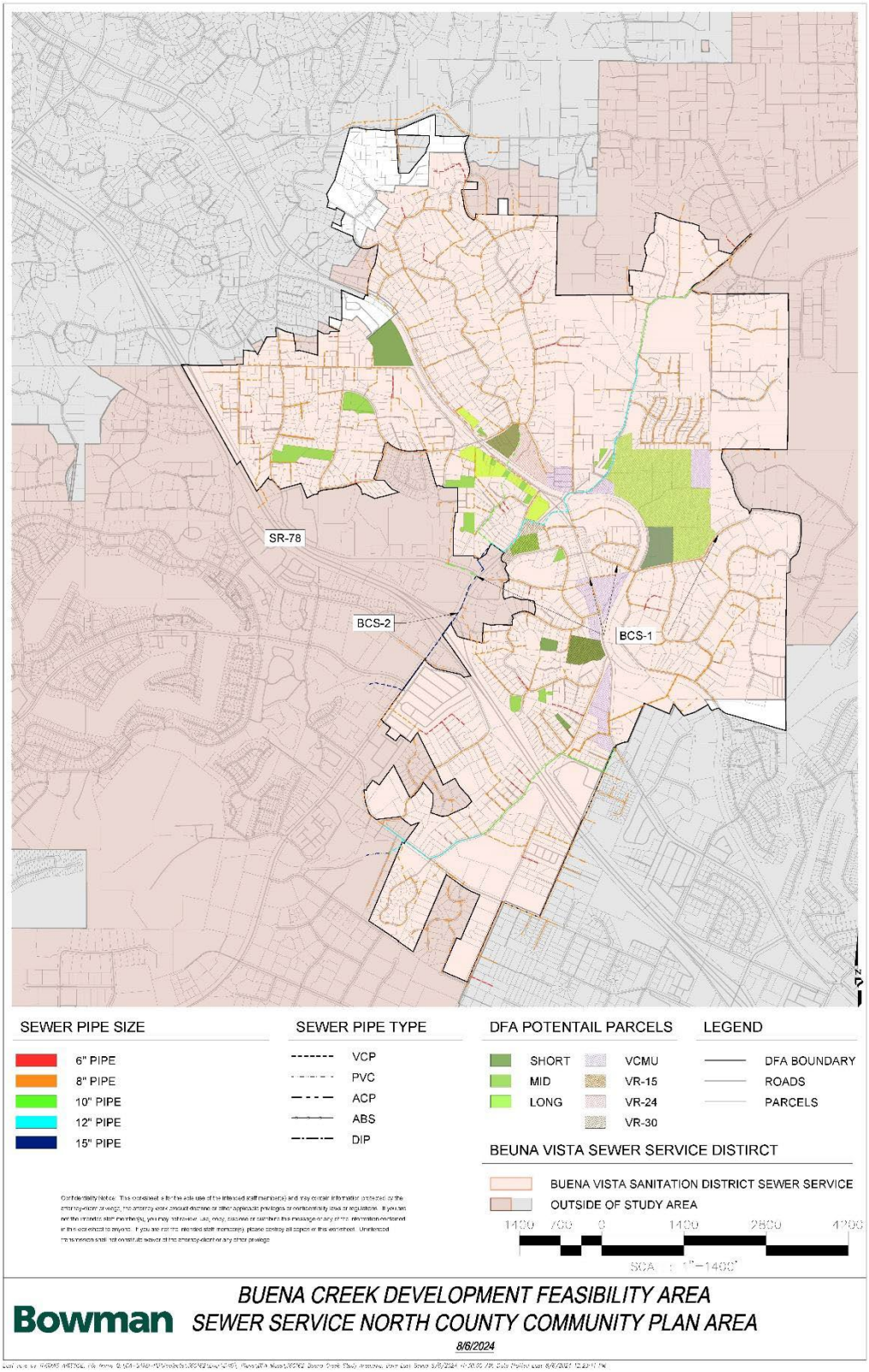
Private street

Undedicated

Map 6. Buena Creek Water Service



Map 7. Buena Creek Sewer Service



Housing Market Assessment

The following section provides a snapshot of opportunities, constraints, and the housing market analysis for the Buena Creek DFA area. Information for this section was sourced from the Market Feasibility Assessment prepared in June 2024 by Keyser Marston Associates (KMA). For more detailed information on residential market trends, see Exhibit C.

Existing Conditions

The Buena Creek DFA area can generally be characterized as containing primarily large-lot, single-family homes, with limited commercial and industrial uses. Existing General Plan Land Uses include General Commercial, Limited Impact Industrial, Neighborhood Commercial, Office Professional, Public/Semi-Public Facilities, Village Core Mixed Use, and Village Residential. Residential densities in the Village Residential areas range from 2 to 30 dwelling units (DU) per acre.

Residential Market Trends and Projected Demand in Housing Units

Capture rates (i.e., estimated number of housing units) are projected to exceed historic trends due to limited regional land supply and growing investment interest in infill development. As a result, Table 6 depicts the projected annual demand for housing units under a low-capture scenario (a conservative estimate of the area's share of regional housing growth) and a high-capture scenario (a greater proportion of regional demand in scenarios of more favorable market conditions and redevelopment potential). Table 7 depicts the potential residential development typologies for the area. Supportable market demand is evaluated in the near-term (0 to 5 years), mid-term (5 to 10 years), and long-term (10 or more years). In addition, the following metrics were used as part of this evaluation: "strong" meaning highly likely to occur, "moderate" meaning likely to occur, and "weak" meaning unlikely to occur.

Table 6. Buena Creek Projected Housing Unit Demand (2025-2050)

Capture Level	Total Units	Units / Year
Low Capture	915 units	37 units / year
High Capture	1,373 units	55 units / year

Table 7. Buena Creek Market Support for Residential Typologies

Capture Level	Units / Year	Near-Term (0–5 years)	Mid-Term (5–10 years)	Long-Term (10+ Years)
For-Sale Residential Development Typologies				
Small Lot Single-Family	10 units / acre	Strong	Strong	Strong
Townhomes	15–20 units / acre	Strong	Strong	Strong
Rental Residential Development Typologies				
Stacked Flat with Tuck-Under Parking	30+ units / acre	Weak	Moderate	Strong
Garden Style Apartments	20–25 units / acre	Moderate	Strong	Strong

"THE NEW SINGLE-FAMILY HOUSING BEING BUILT IS TOO EXPENSIVE. I WOULD RATHER HAVE CONDOS OR APARTMENTS IF IT LOWERS THE PRICE."
– BUENA CREEK RESIDENT

Housing Development Financial Feasibility

Market-Rate Housing Development Financial Feasibility

This section provides a snapshot of housing prototypes and feasibility based on residential land values for the Buena Creek DFA area. Information for this section was sourced from a Buena Creek Financial Feasibility Analysis created in June 2024 by Keyser Marston Associates (KMA). For more detailed information on housing development financing trends, see Exhibit D.

Each residual land value model incorporated estimates of development costs, market rents/values, and target developer returns reflective of recent comparable projects and available market and industry data. Development prototypes that make financial sense generate positive residual land values, which indicate that a developer or investor could acquire the site, construct the development, sell or lease the completed development, and receive at least an industry standard target return on their investment. A description of each housing typology evaluated in the Buena Creek DFA area can be found in Table 8.

As seen in Table 9, small-lot, single-family and attached townhomes make the most financial sense in Buena Creek. Note that due to proximity to transit, higher density apartments were evaluated and found not to make financial sense at present. However, some developments of smaller apartments, referred to as garden-style apartments, have been permitted in the Buena Creek area.

"WE NEED MORE AFFORDABLE HOUSING, WHICH MEANS MORE DENSITY TO ACCOMMODATE THAT."
– BUENA CREEK RESIDENT

Table 8. Buena Creek Summary of Development Prototypes

Development Prototype	Illustrative Example	General Project Description
A Large Lot Single-Family Detached Homes		• 4.13-acre site • 2 units/ gross acre (Village Residential 2) • For-sale housing • 8 units • 1 to 2 stories • Attached garages • 3,688 SF average unit size
B Small Lot Single-Family Detached Homes		• 8.97-acre site • 7.3 units/gross acre (Village Residential 7.3) • For-sale housing • 65 units • 2 stories • Attached garages • 2,020 SF average unit size
C Attached Townhomes		• 1.29-acre site • 15 units/gross acre (Village Residential 15) • For-sale housing • 19 units • 2 stories • Attached garages • 1,645 SF average unit size
D Attached Townhomes (In-fill Site)		• 0.64-acre site • 15 units/gross acre (Village Residential 15) • For-sale housing • 9 units • 3 stories • Attached garages • 1,400 SF average unit size
E Stacked Flat w/Surface and Tuck-Under Parking		• 7.36-acre site • 30 units/gross acre (Village Residential 30) • Rental housing • 220 units • 3 stories • Surface and tuck-under parking • 850 SF average unit size

Table 9. Buena Creek Residual Land Values by Development Prototype

Product Type	A Large Lot Single-Family Detached Homes	B Small Lot Single-Family Detached Homes	C Attached Townhomes	D Attached Townhomes (In-fill Site)	E Stacked Flat w/Surface and Tuck-Under Parking
Tenure	For-Sale	For-Sale	For-Sale	For-Sale	Rental
Site Size (Gross)	4.13 Acres	8.97 Acres	1.29 Acres	0.64 Acres	7.36 Acres
Residual Land Value (2024 $)	$1,265,000 $158,000/Unit $7/SF Site (1)	$7,508,000 $116,000/Unit $19/SF Site (1)	$1,947,000 $102,000/Unit $35/SF Site (1)	$755,000 $84,000/Unit $27/SF Site (1)	($13,978,000) ($64,000)/Unit ($44)/SF Site (1)
Financial Feasibility Outcome	Moderate Positive	Strong Positive	Strong Positive	Strong Positive	Negative
(1) Reflects residual land value per SF of gross site area.					

Land Use Analysis

Current Land Use Policy

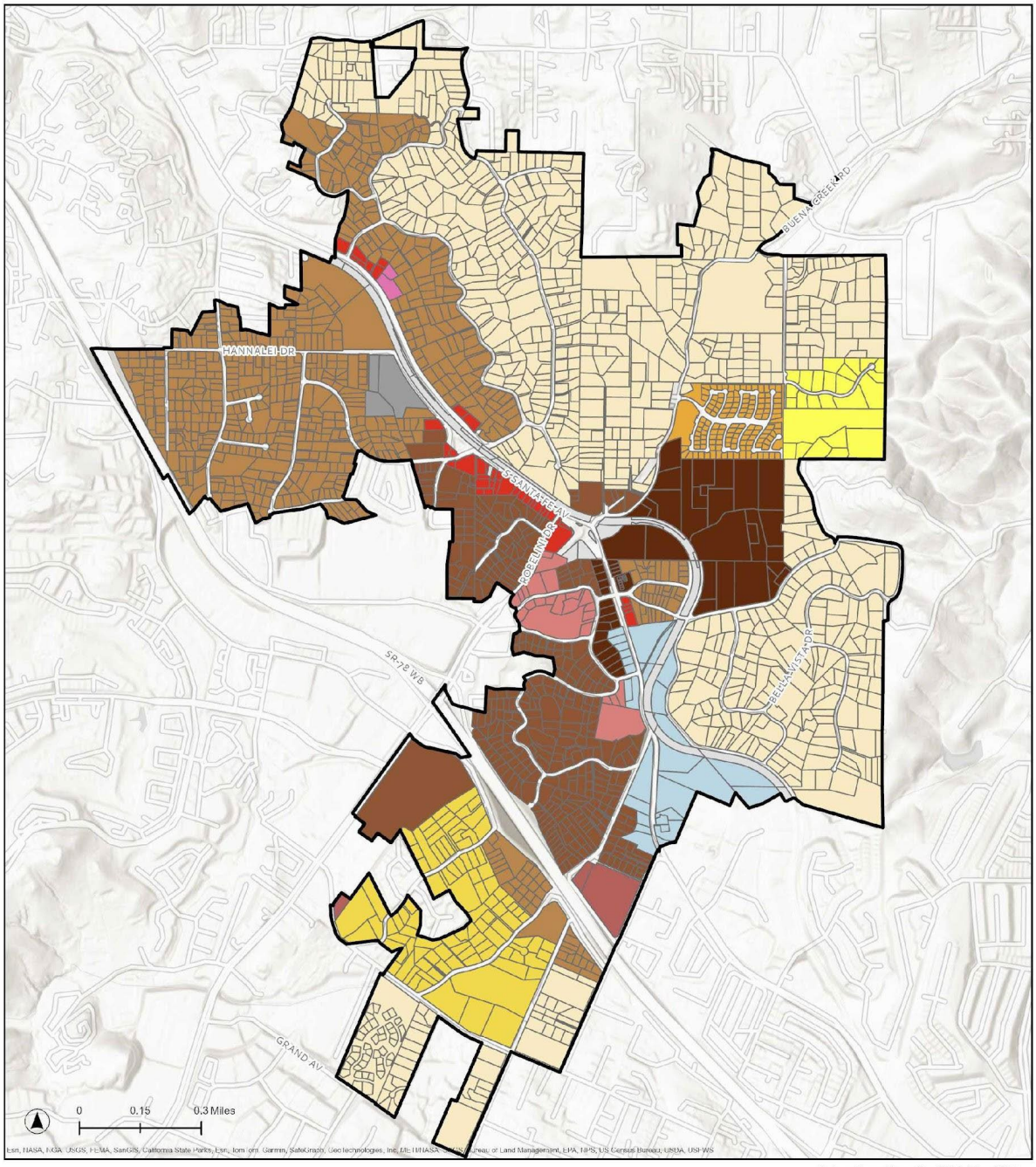
The Buena Creek DFA area consists of 2,361 parcels, mostly developed with residential uses. Commercial, professional, and industrial land uses are limited, as are recreational and conserved open space lands.

As with the other DFA areas, not all current actual uses align with land use designations, and in some cases, residential properties are located on commercially zoned lands or commercial properties are located on industrial zoned lands, etc. Table 10 shows a breakdown of the land use designations found in the Buena Creek DFA area and Map 8 demonstrates the distribution of those designations geographically.

Additionally, a notable portion of land within the Buena Creek DFA area has low building-to-land values. Building-to-Land Value (BLV) compares the assessed improvement value to the assessed land value. Land values that are higher than improvement values are generally seen as “underutilized lands,” which may be more amenable to redevelopment. As of 2024, 46% of Buena Creek parcels are underutilized (BLV <1.0) as seen in Map 9.

Table 10. Buena Creek Current Land Use Designations		
Land Use Designation	Buena Creek Parcel Count	Percentage of Total
GENERAL COMMERCIAL	42	1.8%
NEIGHBORHOOD COMMERCIAL	-	0.0%
OFFICE PROFESSIONAL	2	0.1%
LIMITED IMPACT INDUSTRIAL	33	1.4%
MEDIUM IMPACT INDUSTRIAL	-	0.0%
OPEN SPACE (CONSERVATION)	-	0.0%
OPEN SPACE (RECREATION)	3	0.1%
PUBLIC AGENCY LANDS	-	0.0%
PUBLIC/SEMI-PUBLIC FACILITIES	27	1.1%
SEMI-RURAL RESIDENTIAL (SR-1)	33	1.4%
SEMI-RURAL RESIDENTIAL (SR-4)	-	0.0%
VILLAGE RESIDENTIAL (VR-2)	831	35.2%
VILLAGE RESIDENTIAL (VR-2.9)	118	5.0%
VILLAGE RESIDENTIAL (VR-4.3)	133	5.6%
VILLAGE RESIDENTIAL (VR-7.3)	698	29.6%
VILLAGE RESIDENTIAL (VR-10.9)	-	0.0%
VILLAGE RESIDENTIAL (VR-15)	357	15.1%
VILLAGE RESIDENTIAL (VR-20)	23	1.0%
VILLAGE RESIDENTIAL (VR-24)	3	0.1%
VILLAGE RESIDENTIAL (VR-30)	58	2.5%
VILLAGE CORE MIXED USE (VC-30)	-	0.0%
SPECIFIC PLAN AREA	-	0.0%
TOTAL	2,361	100%

Map 8. Buena Creek Land Use Designations (General Plan)



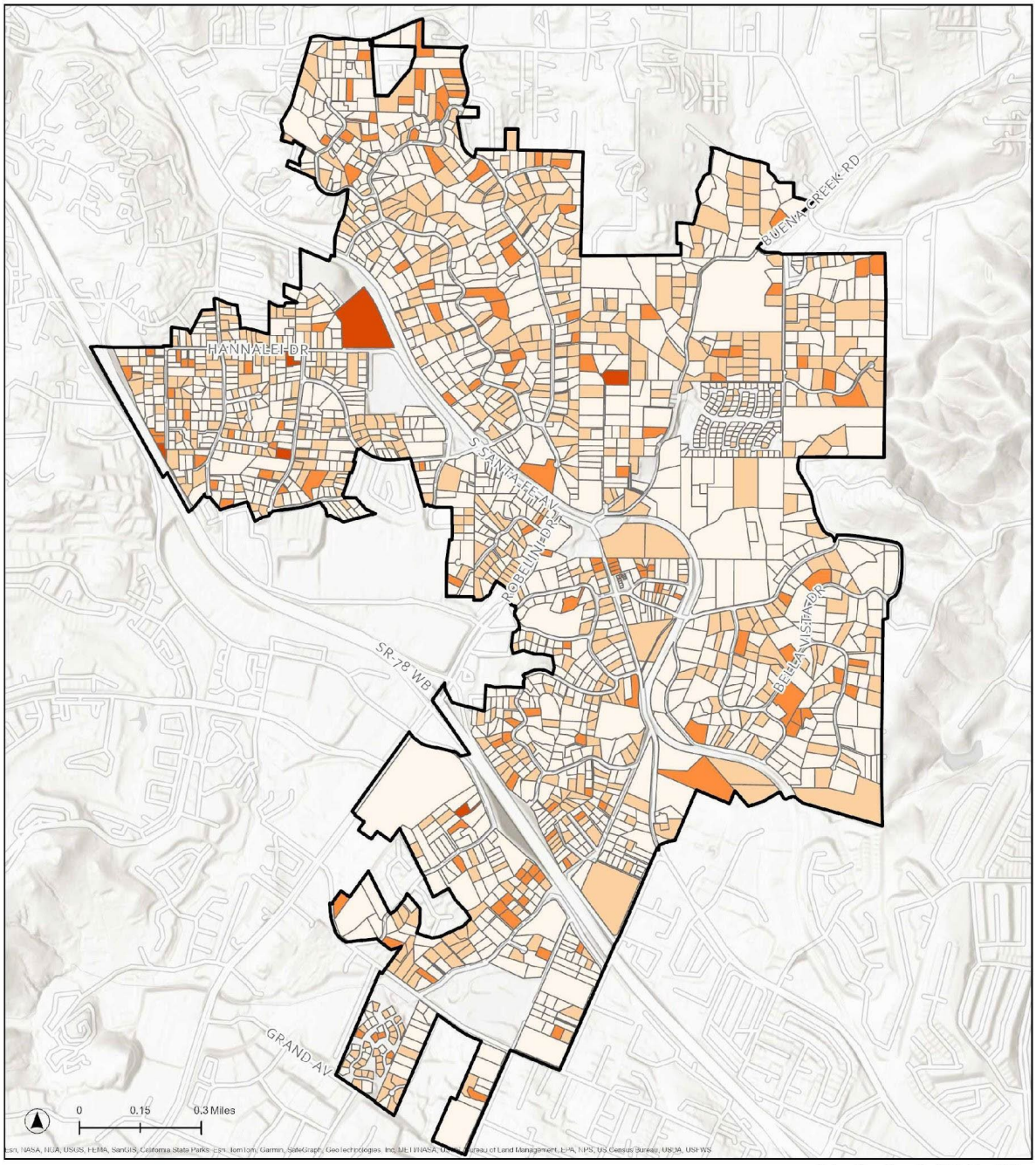
Data gathered from SanGIS in May 2024

Buena Creek Land Use

General Plan Land Use

- GENERAL COMMERCIAL
- LIMITED IMPACT INDUSTRIAL
- MEDIUM IMPACT INDUSTRIAL
- NEIGHBORHOOD COMMERCIAL
- OFFICE PROFESSIONAL
- OPEN SPACE (CONSERVATION)
- OPEN SPACE (RECREATION)
- PUBLIC AGENCY LANDS
- PUBLIC/SEMI-PUBLIC FACILITIES
- SPECIFIC PLAN AREA
- VILLAGE CORE MIXED USE
- SEMI-RURAL RESIDENTIAL (SR-1)
- SEMI-RURAL RESIDENTIAL (SR-4)
- VILLAGE RESIDENTIAL (VR-2)
- VILLAGE RESIDENTIAL (VR-2.9)
- VILLAGE RESIDENTIAL (VR-4.3)
- VILLAGE RESIDENTIAL (VR-7.3)
- VILLAGE RESIDENTIAL (VR-10.9)
- VILLAGE RESIDENTIAL (VR-15)
- VILLAGE RESIDENTIAL (VR-20)
- VILLAGE RESIDENTIAL (VR-24)
- VILLAGE RESIDENTIAL (VR-30)

Map 9. Buena Creek Building-to-Land-Value (BLV)



Data gathered from SanGIS in May 2024

Buena Creek BLV

DFA Boundary

- 0 - 1
- 2 - 3
- 4 - 10
- 11 - 42
- 43 - 110

Building to Land Value is calculated by dividing the assessed improvement value by the assessed land value. Information was gathered from SanGIS Zoning information. Parcels that are empty did not have assessed value available.

Housing Development

The housing density within Buena Creek is lower than what is permitted under current General Plan land use. As of 2024, there are 2,751 DUs within the Buena Creek DFA area, as can be seen in Map 10.[1] An objective of this study is to uncover ways to increase that number, while still providing high quality of life to current and future residents and addressing environmental constraints of the area.

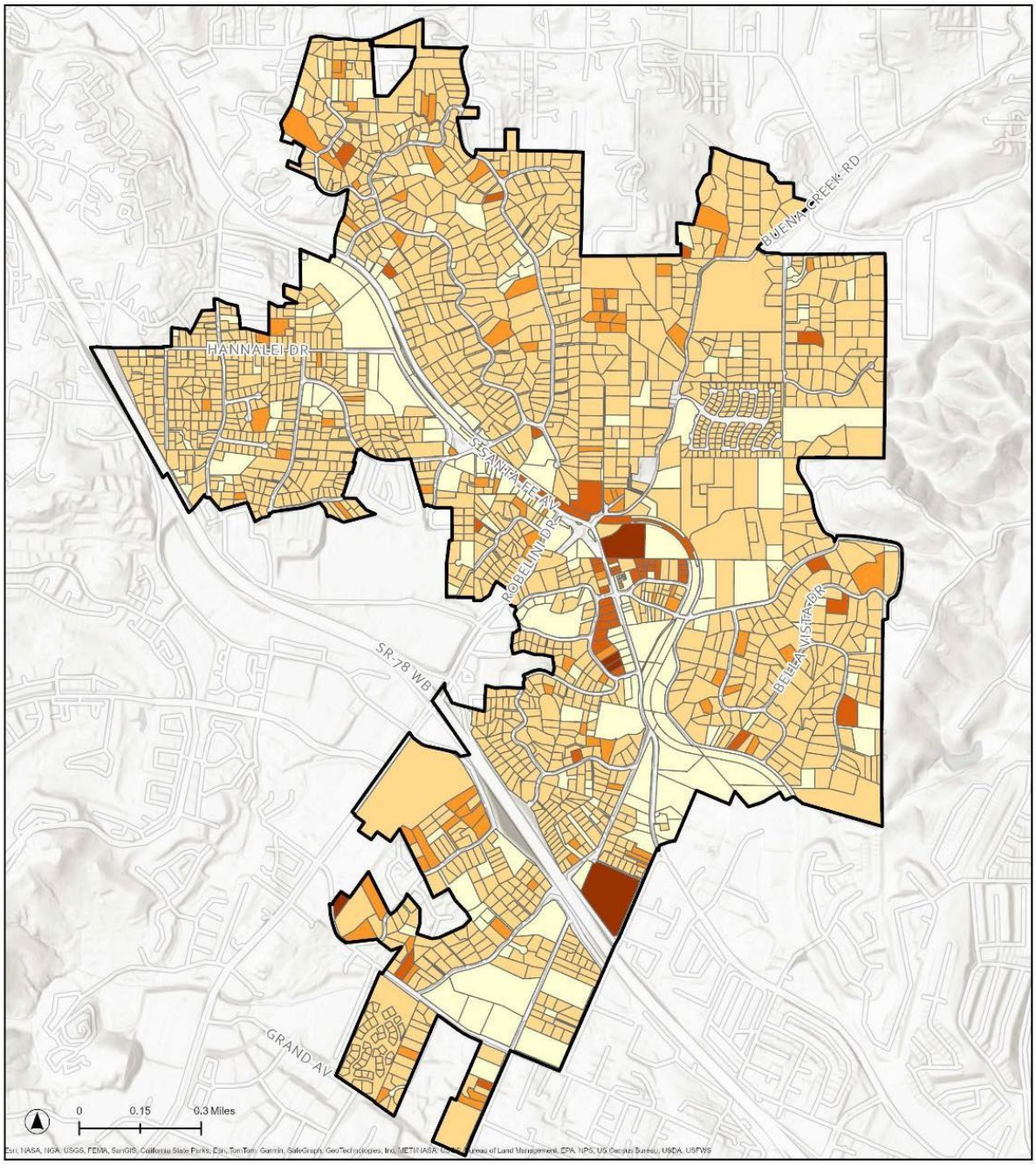
Environmental Constraints

Environmental conditions can have adverse effects on the housing market, including impacts to housing density or form, structural or infrastructural costs, additional studies for land preparation, time delays, capacity considerations, safety risk, insurance, loans, and more. This study evaluated earthquake fault zones, airport hazard zones, airport noise, floodplains, wetlands, forest conservation, habitat preserve, environmentally sensitive areas, pre-approved mitigation zones, publicly owned lands, and slope as constraining factors to housing development. Fire risk was not included as a constraining factor. While it is acknowledged that the county faces increasing fire risk, the mitigation efforts around fire risk for housing development demote this factor as an environmental constraint for analysis purposes.

The main environmental constraints to housing development in Buena Creek are slopes and floodplains, covering 5% and 3% of the land, respectively. These constraints can be seen on Maps 11 and 12. These items can be mitigated to a reasonable degree for a cost. While risk and cost tolerance will vary depending on the developer, the buyer, and the market, it is the intention of this study to consider the most feasible options, i.e., the parcels that pose the lowest risk and the highest potential for development.

[1] Current dwelling unit data sourced from UrbanFootprint.

Map 10. Buena Creek Actual Existing DUs



* Data gathered from Urban Footprint in 2024

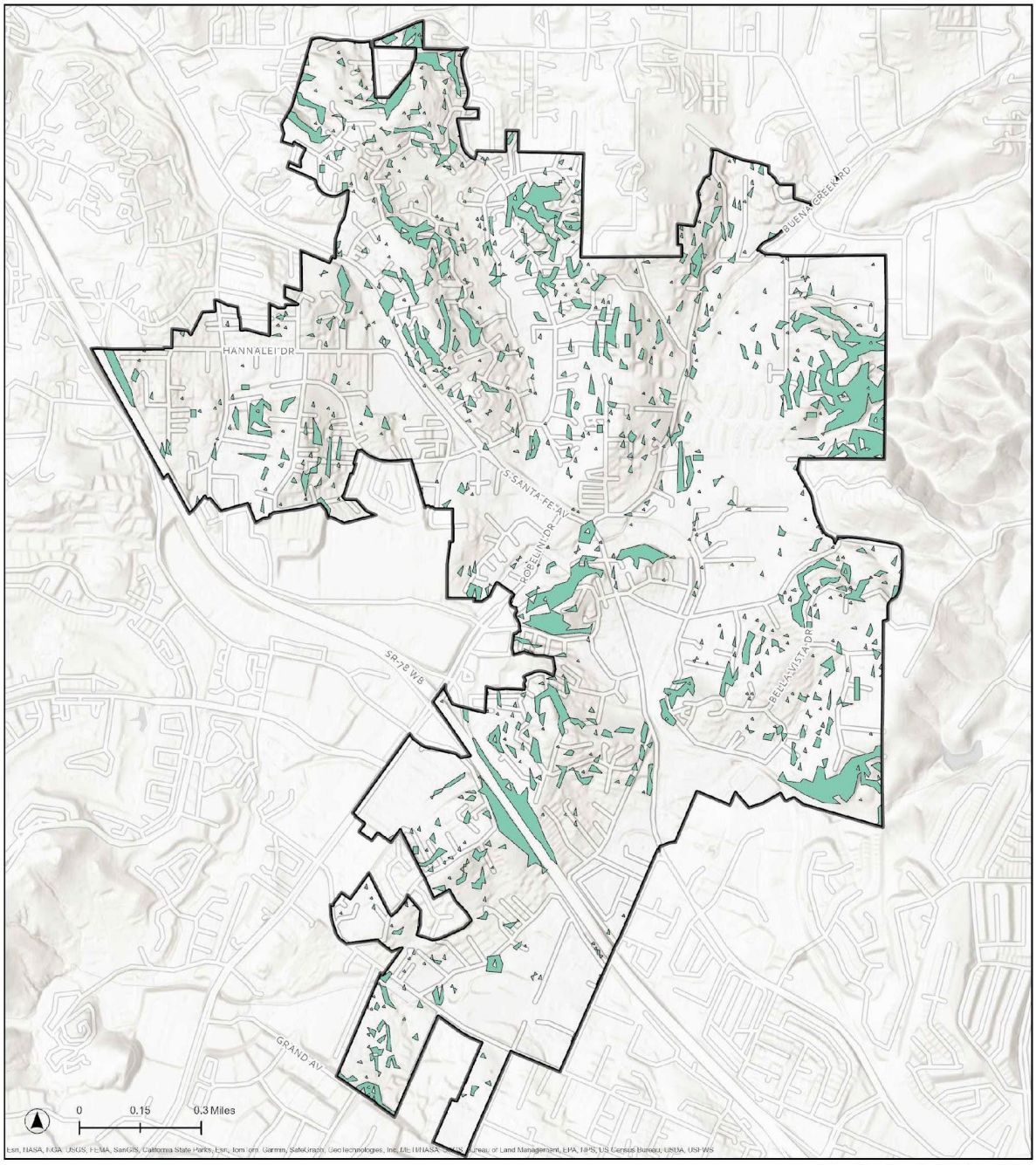
Buena Creek Dwelling Units

DFA Boundary

Number of Dwelling Units

0
1
2
3 - 13
14 - 264

Map 11. Buena Creek Topographic Slope

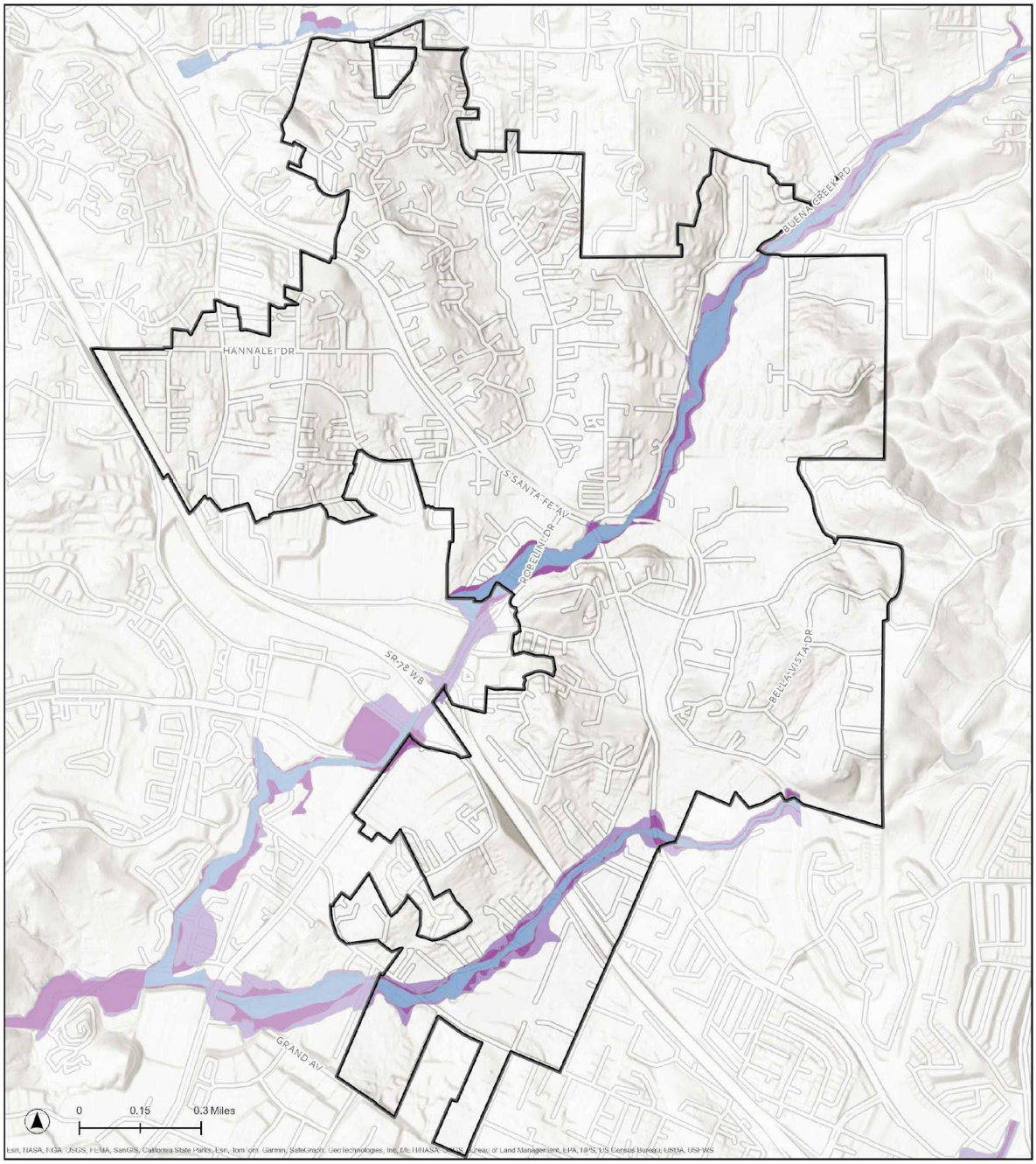


Data gathered from SanGIS in May 2024

Buena Creek Slope

Areas of slope greater than 25%

Map 12. Buena Creek Floodplains



Data gathered from Federal Emergency Management Agency

Buena Creek Flood Hazard

- 0.2% Annual Chance Flood Hazard
- 1% Annual Chance Flood Hazard
- Future Conditions 1% Annual Chance Flood Hazard
- Regulatory Floodway
- Area with Reduced Risk Due to Levee
- Special Floodway

Land Use Alternatives

To explore the impact of land use designations on housing development, three alternative scenarios of land use were prepared for each DFA area. This analysis is largely independent of the market analysis. The land use analysis revealed that the current General Plan land use designations are not being fully utilized, which means the area is already zoned for more housing than is currently built. As a result, increasing capacity alone would not necessarily lead to more housing development. In fact, allowing more density without addressing key issues, like infrastructure or building costs, can lead to higher land prices based on the assumption that more housing will be built, even if it's not anticipated in the near-term. This can artificially drive up costs and make development less feasible. To ensure a balanced approach, any proposed land use amendments must be evaluated holistically. The findings from this analysis will be shared with the County's Framework project to inform their review of land use designations. However, before any changes to land use are made, the key barriers identified in this report (see Chapter 7) must first be addressed.

Under each alternative scenario, a modification of allowable dwelling units (DU) is unlocked. Table 11 summarizes actual existing DUs that are already built out (2024 Actual), expected unit yield under current zoning with no changes (Alternative 0), and expected unit yield under three alternatives that vary in intensity of modifications (Alternatives 1, 2, and 3). The land use alternative options see a shift in allowable DUs. DU yields factor in land use designations, density allowances, unconstrained land acreage, yield factors, vacancy, and redevelopment potential. More information on methodology, parcel selection, and designation changes can be seen in Exhibit E.

Table 11. Buena Creek Dwelling Units (DU) per Alternative Scenario Summary

Dwelling Unit Yields	2024 Actual	Alternative 0	Alternative 1	Alternative 2	Alternative 3
Actual Existing DU (2024)	2,751				
DU Yield on All Unconstrained Land		5,708	5,521	5,609	5,752
DU Yield on Unconstrained Vacant Land Only		319	334	355	356
DU Yield on Unconstrained Underutilized Land only (non-vacant)[1]		2,661	2,492	2,539	2,597

1. Underutilized land refers to parcels that have a Building-to-Land Value (BLV) of less than 1. A low BLV indicates that the value of improvements is less than the value of the land, and therefore, offers a strong financial incentive to redevelop for better property value.

In the case of the Buena Creek DFA area, an intentional shift from VR-30 to Village Core Mixed Use (VC-30) offers the same housing density at 30 dwelling units per gross acre. However, Village Core Mixed Use supports a variety of commercial and residential uses to encourage a healthy local economy rather than only a bedroom community. While this may result in the sacrifice of some housing units for commercial uses, it supports Vehicle Miles Traveled (VMT) goals by promoting development close to infrastructure, transit, and amenities; enhancing walkability; and creating a diverse tax base. Table 12 demonstrates the changes under each scenario by land use. Maps 13, 14, 15, and 16 reflect the alternative scenarios geographically.

Table 12. Buena Creek Dwelling Units on All Unconstrained Land

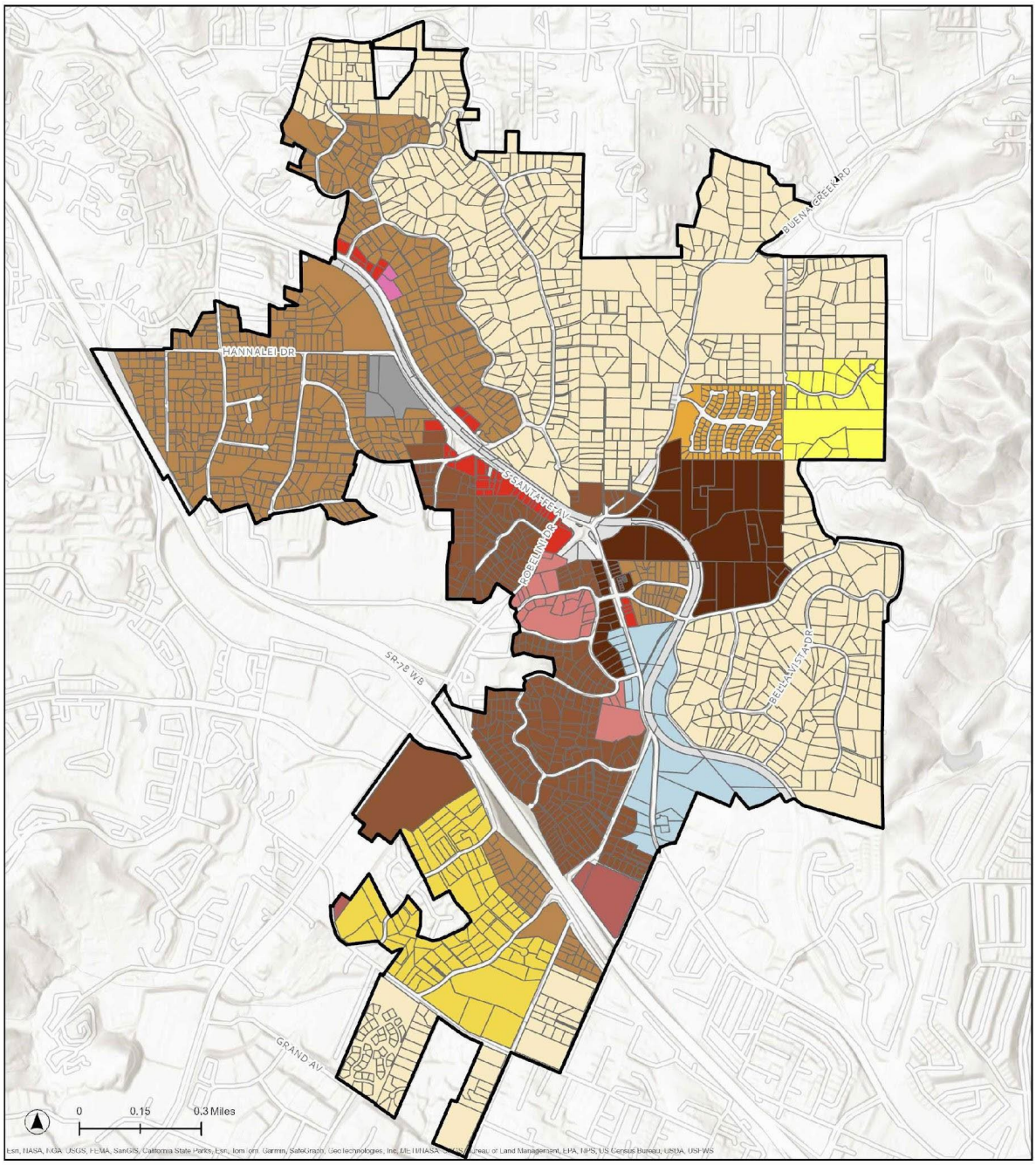
Residential Land Use Designation	DU Density	Yield Factor[1]	Actual Existing DU[2]	DU Yield Alt 0	DU Yield Alt 1	DU Yield Alt 2	DU Yield Alt 3
GENERAL COMMERCIAL	n/a	-	14	-	-	-	-
LIMITED IMPACT INDUSTRIAL	n/a	-	1	-	-	-	-
MEDIUM IMPACT INDUSTRIAL	n/a	-	-	-	-	-	-
NEIGHBORHOOD COMMERCIAL	n/a	-	-	-	-	-	-
OFFICE PROFESSIONAL	n/a	-	5	-	-	-	-
OPEN SPACE (CONSERVATION)	n/a	-	-	-	-	-	-
OPEN SPACE (RECREATION)	n/a	-	-	-	-	-	-
PUBLIC AGENCY LANDS	n/a	-	-	-	-	-	-
PUBLIC/SEMI-PUBLIC FACILITIES	n/a	-	4	-	-	-	-
SPECIFIC PLAN AREA	40 DU / acre	70%	-	-	-	-	-
SEMI-RURAL RESIDENTIAL (SR-1)	1 DU / acre	70%	24	13	13	13	13
SEMI-RURAL RESIDENTIAL (SR-4)	1 DU / 4 acres	70%	-	-	-	-	-
VILLAGE RESIDENTIAL (VR-2)	2 DU / acre	70%	767	783	767	767	767
VILLAGE RESIDENTIAL (VR-2.9)	2.9 DU / acre	70%	102	127	127	127	127

VILLAGE RESIDENTIAL (VR-4.3)	4.3 DU / acre	70%	132	55	55	55	55
VILLAGE RESIDENTIAL (VR-7.3)	7.3 DU / acre	70%	682	1,401	1,401	1,401	1,401
VILLAGE RESIDENTIAL (VR-10.9)	10.9 DU / acre	70%	-	-	-	-	-
VILLAGE RESIDENTIAL (VR-15)	15 DU / acre	62%	338	1,287	1,254	1,254	1,254
VILLAGE RESIDENTIAL (VR-20)	20 DU / acre	73%	15	251	298	131	131
VILLAGE RESIDENTIAL (VR-24)	24 DU / acre	89%	286	202	377	446	446
VILLAGE RESIDENTIAL (VR-30)	30 DU / acre	76%	381	1,588	906	1,093	1,093
VILLAGE CORE MIXED USE	30 DU / acres	32%	-	-	322	322	464
TOTAL			2,751	5,708	5,521	5,609	5,752

1. DU calculations include yield factors, which is a percentage based on actual yield expectations. See Data Notes for more info.

2. Source: UrbanFootprint (accessed 2024).

Map 13. Buena Creek Current Land Use (Alternative 0)



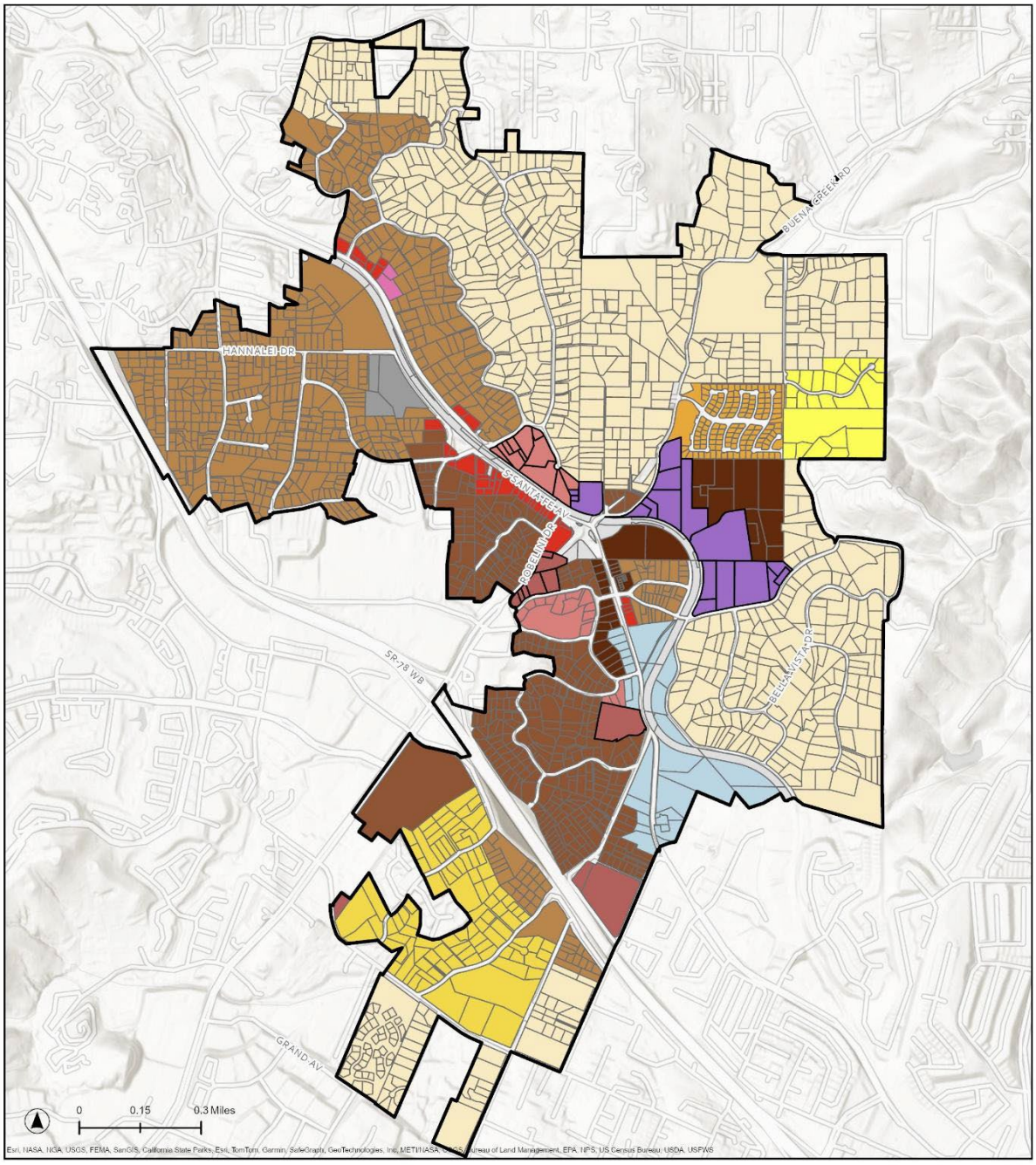
Data gathered from SanGIS in May 2024

Buena Creek Land Use

General Plan Land Use

- GENERAL COMMERCIAL
- LIMITED IMPACT INDUSTRIAL
- MEDIUM IMPACT INDUSTRIAL
- NEIGHBORHOOD COMMERCIAL
- OFFICE PROFESSIONAL
- OPEN SPACE (CONSERVATION)
- OPEN SPACE (RECREATION)
- PUBLIC AGENCY LANDS
- PUBLIC/SEMI-PUBLIC FACILITIES
- SPECIFIC PLAN AREA
- VILLAGE CORE MIXED USE
- SEMI-RURAL RESIDENTIAL (SR-1)
- SEMI-RURAL RESIDENTIAL (SR-4)
- VILLAGE RESIDENTIAL (VR-2)
- VILLAGE RESIDENTIAL (VR-2.9)
- VILLAGE RESIDENTIAL (VR-4.3)
- VILLAGE RESIDENTIAL (VR-7.3)
- VILLAGE RESIDENTIAL (VR-10.9)
- VILLAGE RESIDENTIAL (VR-15)
- VILLAGE RESIDENTIAL (VR-20)
- VILLAGE RESIDENTIAL (VR-24)
- VILLAGE RESIDENTIAL (VR-30)

Map 14. Buena Creek Land Use Alternative 1



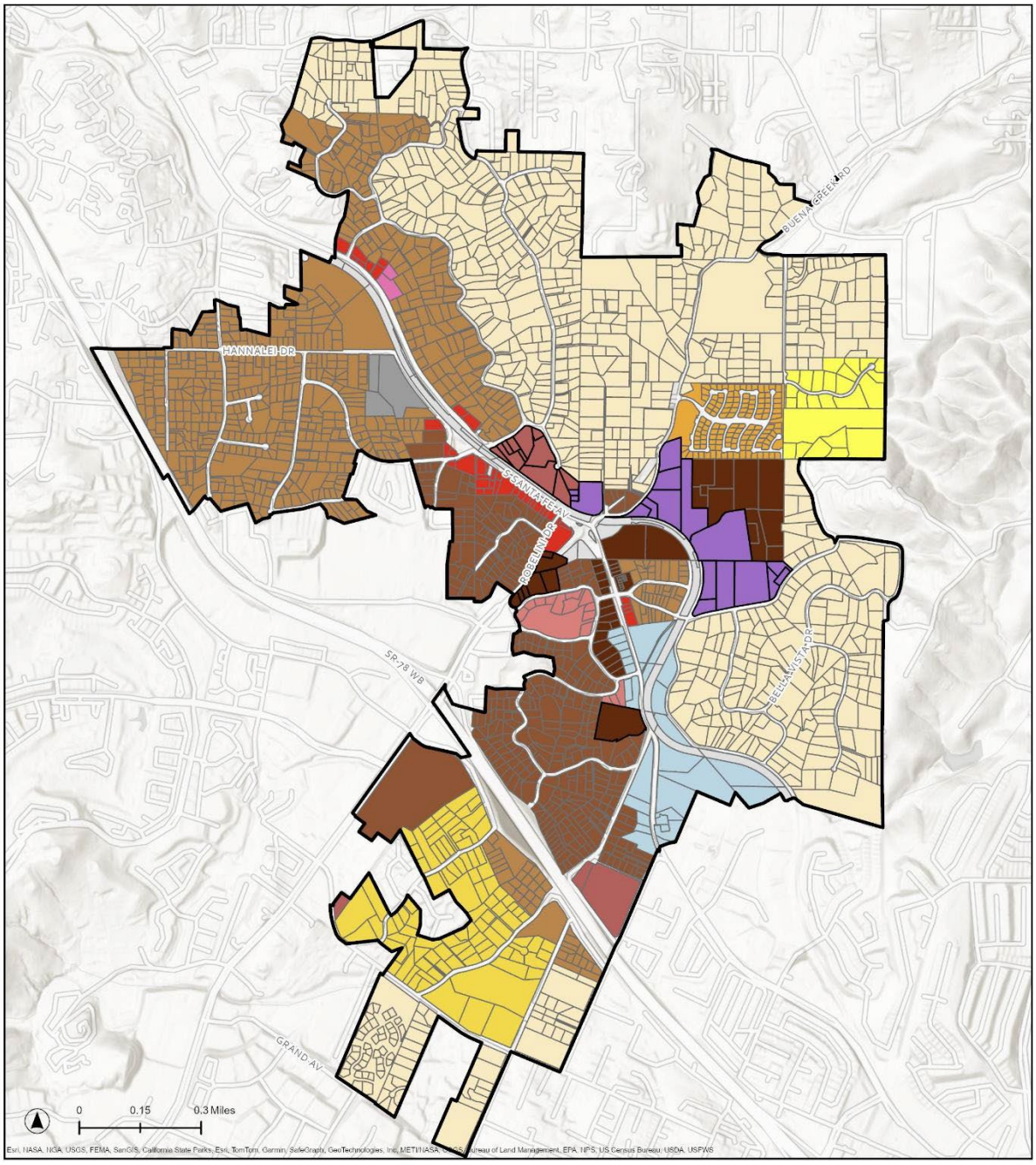
Data gathered from SanGIS in May 2024

Buena Creek Alternative 1

Alternative 1
- Village Core Mixed Use
- Village Residential (VR-20)
- Village Residential (VR-24)

General Plan Land Use
- GENERAL COMMERCIAL
- LIMITED IMPACT INDUSTRIAL
- MEDIUM IMPACT INDUSTRIAL
- NEIGHBORHOOD COMMERCIAL
- OFFICE PROFESSIONAL
- OPEN SPACE (CONSERVATION)
- OPEN SPACE (RECREATION)
- PUBLIC AGENCY LANDS
- PUBLIC/SEMI-PUBLIC FACILITIES
- SEMI-RURAL RESIDENTIAL (SR-1)
- SEMI-RURAL RESIDENTIAL (SR-4)
- SPECIFIC PLAN AREA
- VILLAGE CORE MIXED USE
- VILLAGE RESIDENTIAL (VR-2)
- VILLAGE RESIDENTIAL (VR-2.9)
- VILLAGE RESIDENTIAL (VR-4.3)
- VILLAGE RESIDENTIAL (VR-7.3)
- VILLAGE RESIDENTIAL (VR-10.9)
- VILLAGE RESIDENTIAL (VR-15)
- VILLAGE RESIDENTIAL (VR-20)
- VILLAGE RESIDENTIAL (VR-24)
- VILLAGE RESIDENTIAL (VR-30)

Map 15. Buena Creek Land Use Alternative 2



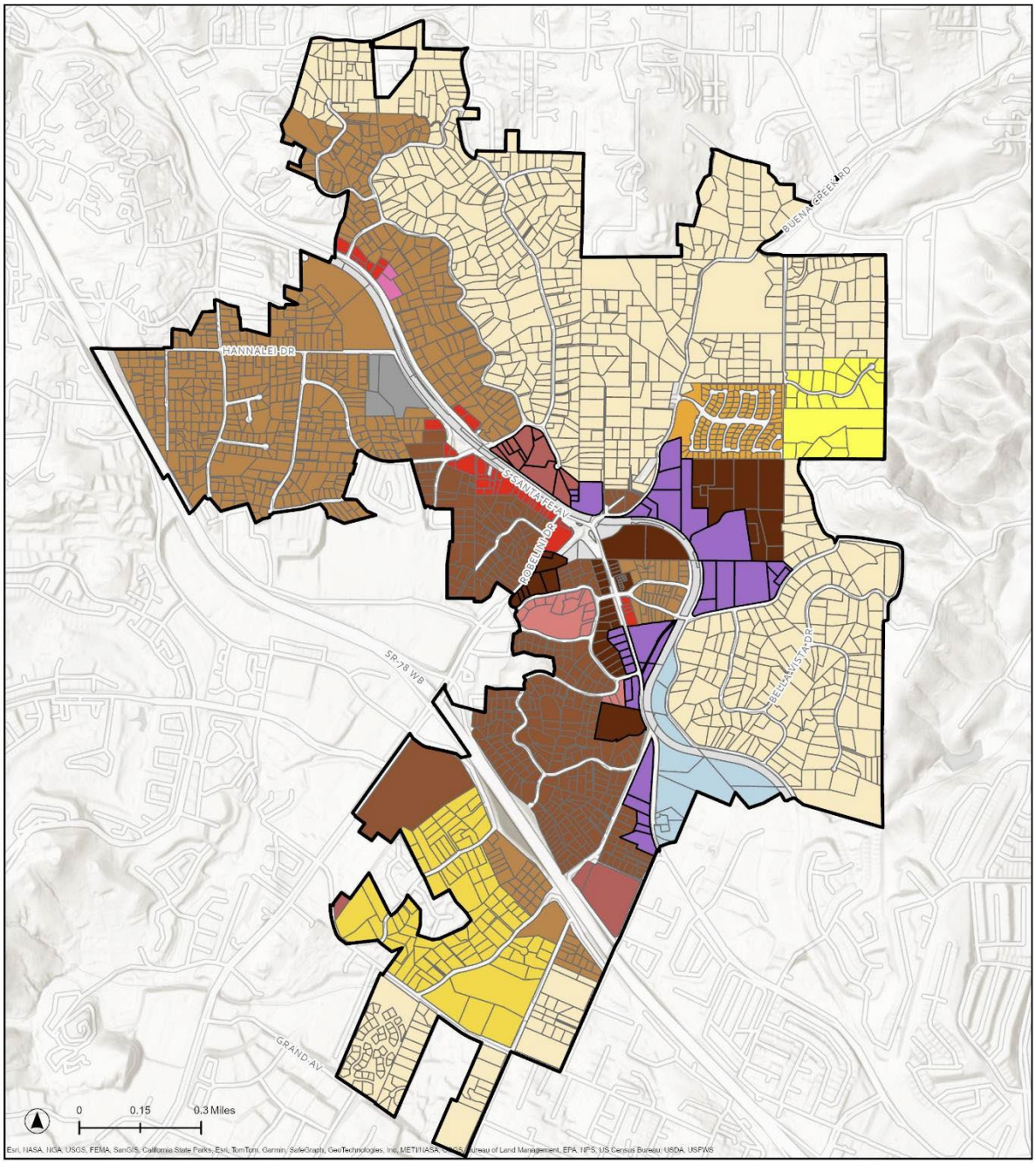
Data gathered from SanGIS in May 2024

Buena Creek Alternative 2

Alternative 2
- Village Core Mixed Use
- Village Residential (VR-15)
- Village Residential (VR-24)
- Village Residential (VR-30)

General Plan Land Use
- GENERAL COMMERCIAL
- LIMITED IMPACT INDUSTRIAL
- MEDIUM IMPACT INDUSTRIAL
- NEIGHBORHOOD COMMERCIAL
- OFFICE PROFESSIONAL
- OPEN SPACE (CONSERVATION)
- OPEN SPACE (RECREATION)
- PUBLIC AGENCY LANDS
- PUBLIC/SEMI-PUBLIC FACILITIES
- SEMI-RURAL RESIDENTIAL (SR-1)
- SEMI-RURAL RESIDENTIAL (SR-4)
- SPECIFIC PLAN AREA
- VILLAGE CORE MIXED USE
- VILLAGE RESIDENTIAL (VR-2)
- VILLAGE RESIDENTIAL (VR-2.9)
- VILLAGE RESIDENTIAL (VR-4.3)
- VILLAGE RESIDENTIAL (VR-7.3)
- VILLAGE RESIDENTIAL (VR-10.9)
- VILLAGE RESIDENTIAL (VR-15)
- VILLAGE RESIDENTIAL (VR-20)
- VILLAGE RESIDENTIAL (VR-24)
- VILLAGE RESIDENTIAL (VR-30)

Map 16. Buena Creek Land Use Alternative 3



Data gathered from SanGIS in May 2024

Buena Creek Alternative 3

Alternative 3
- Village Core Mixed Use
- Village Residential (VR-15)
- Village Residential (VR-24)
- Village Residential (VR-30)

General Plan Land Use
- GENERAL COMMERCIAL
- LIMITED IMPACT INDUSTRIAL
- MEDIUM IMPACT INDUSTRIAL
- NEIGHBORHOOD COMMERCIAL
- OFFICE PROFESSIONAL
- OPEN SPACE (CONSERVATION)
- OPEN SPACE (RECREATION)
- PUBLIC AGENCY LANDS
- PUBLIC/SEMI-PUBLIC FACILITIES
- SEMI-RURAL RESIDENTIAL (SR-1)
- SEMI-RURAL RESIDENTIAL (SR-4)
- SPECIFIC PLAN AREA
- VILLAGE CORE MIXED USE
- VILLAGE RESIDENTIAL (VR-2)
- VILLAGE RESIDENTIAL (VR-2.9)
- VILLAGE RESIDENTIAL (VR-4.3)
- VILLAGE RESIDENTIAL (VR-7.3)
- VILLAGE RESIDENTIAL (VR-10.9)
- VILLAGE RESIDENTIAL (VR-15)
- VILLAGE RESIDENTIAL (VR-20)
- VILLAGE RESIDENTIAL (VR-24)
- VILLAGE RESIDENTIAL (VR-30)

Conclusion

The Buena Creek DFA area faces constraints that limit development identified through a combination of market, financial, infrastructure, and land use analyses. The market assessment determined that Buena Creek has a lower median household income than the surrounding region, making it less attractive to developers targeting higher income buyers. The financial feasibility analysis revealed that land values in Buena Creek are significantly lower than in neighboring areas such as the City of San Marcos and the City of Vista. This makes land assembly (i.e., combination of adjacent parcels into a larger site to make development more feasible) and redevelopment challenging, as property owners have little financial incentive to sell or redevelop. Many of the available parcels in Buena Creek are too small for large-scale development. The land use analysis found that land assembly would be necessary to create development sites that are financially and functionally viable. Environmental constraints such as steep slopes (5% of the DFA area) and floodplains (3% of the DFA area) present challenges to construction and infrastructure development. These constraints increase building costs and require additional engineering solutions. The infrastructure assessment indicated that sewer capacity studies and pipeline expansions are needed to accommodate higher-density residential development. Specific areas, such as along South Santa Fe Avenue, require water main replacements and sewer line upgrades before new residential projects can be supported.

Despite these challenges, the report identifies several opportunities to support residential growth in the Buena Creek DFA area. Buena Creek is well-positioned to attract residents employed in the high-quality office markets along the SR 78 corridor, given its proximity to transit and major employment centers. Neighboring cities such as Vista and San Marcos have seen strong housing development, and Buena Creek can benefit from this momentum by positioning itself as a more affordable alternative. The land use analysis recommends focusing on higher-density multifamily developments near the Buena Creek Sprinter Station and South Santa Fe Avenue to support transit-oriented development and increase housing supply. The market assessment identified demand for townhomes and small lot single-family homes, making these ideal housing types for areas adjacent to existing residential communities and schools. Community feedback emphasized the need for more diverse housing options, including affordable units. The study suggests that adding medium-density housing could help address this demand while maintaining neighborhood character.

To capitalize on these opportunities while addressing constraints, it is recommended to develop a Specific Plan for the Sprinter Station area in Buena Creek, prioritizing grant funding for its creation. This plan should focus on placemaking initiatives such as wayfinding signage, transit enhancements, business improvement opportunities, and expanded access to open space. Additionally, addressing roadway congestion through targeted infrastructure improvements and exploring funding mechanisms like Community Facilities Districts (CFDs), Enhanced Infrastructure Financing Districts (EIFDs), Special Assessments, Landscaping and Lighting Maintenance Districts (LLMDs), or Community Development Block Grants (CDBGs) will ensure a comprehensive and well-funded revitalization strategy.

Valle de Oro / Casa de Oro

04. VALLE DE ORO/CASA DE ORO

Map 17. Valle de Oro/Casa de Oro DFA area

Introduction

The Valle de Oro/Casa de Oro DFA area is a 0.81-square-mile area located in East San Diego County as seen in Map 17. The area is adjacent to the cities of La Mesa, El Cajon, and Lemon Grove, and encompasses a portion of State Route 94 (SR 94) with nearby access to SR 125.

On January 11, 2023, the Campo Road Corridor Revitalization Specific Plan (Specific Plan) was adopted, which provides guidance for the future development of the Campo Road Commercial Corridor between Rogers Road and Granada Avenue. This corridor is envisioned to be a major commercial and civic heart of the area, with improvements to connectivity and transit, complementary tenant mixes, residential choices, adequate parking, art and expression, and more.

Community Demographics

Demographic Overview

The Valle de Oro/Casa de Oro DFA area is estimated to have a population of 5,575 (2023). The population is concentrated near the commercial sections of Campo Road and in the southern portion of the DFA area, as seen in Map 18 below. The demographic information for Valley de Oro/Casa de Oro can also be seen in Table 13.

Map 18. Valle de Oro/Casa de Oro Population Density

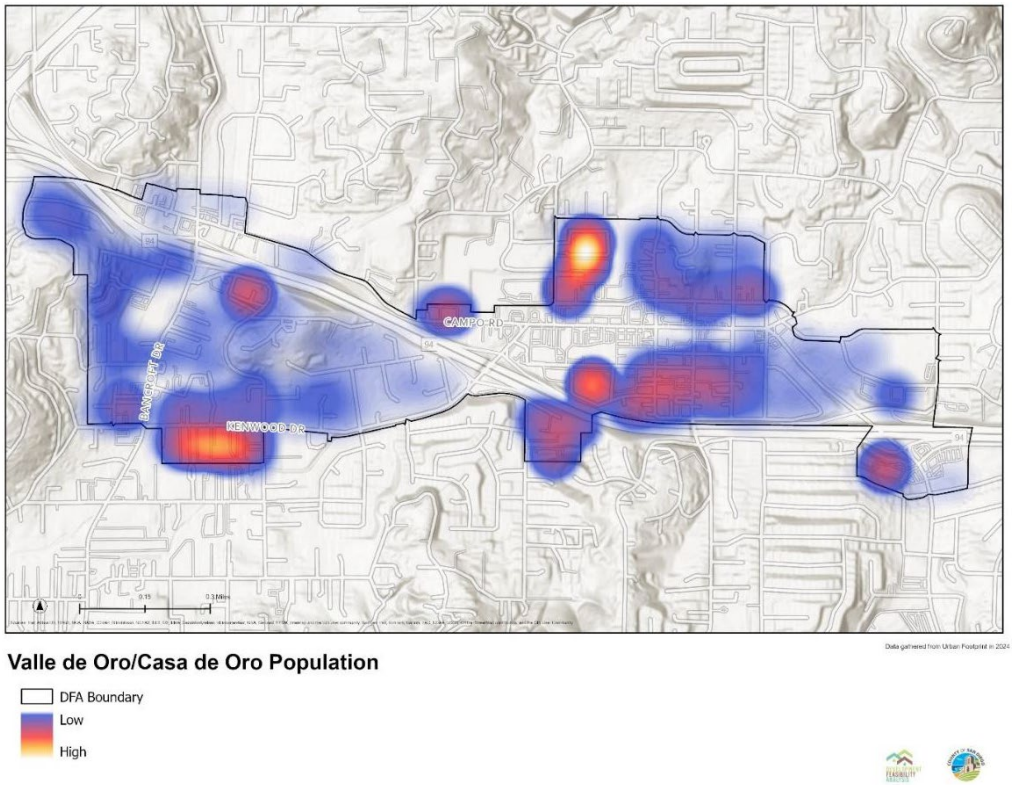


Table 13. Valle de Oro/Casa de Oro Demographic Overview with comparisons (2023)

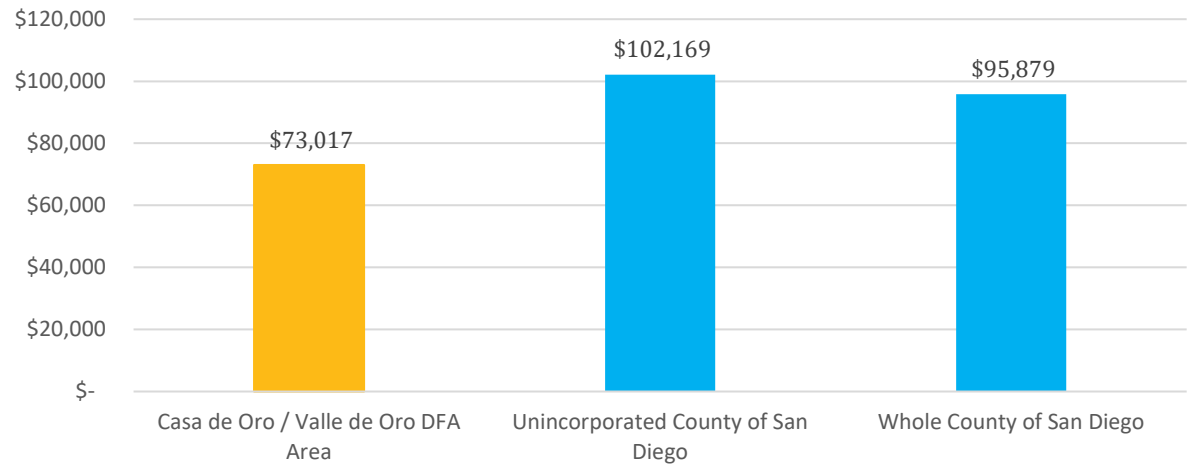
Demographics (2023)	Casa de Oro /Valle de Oro DFA area	Unincorporated County of San Diego	Entire County of San Diego
Population	5,575	519,735	3,325,714
Median Age	35.1 years	38.7 years	36.7 years
Unemployment Rate	6.2%	5.2%	4.9%
Households	1,954	167,962	1,172,259
Average Household Size	2.82	2.92	2.74
Owner-Occupied Housing Units	44.0%	65.6%	51.5%
Renter-Occupied Housing Units	51.8%	27.8	42.5%
Vacant Housing Units	4.2%	6.6%	6.1%

Source: Esri Business Analyst Online, May 2024.

Household Income Distribution

The median household income in the Valle de Oro/Casa de Oro DFA area is $73,017 (2023), which is lower than the overall County of San Diego, estimated at $95,879 (2023), as seen in Figure 4.

Figure 4. Median Household Income, Valle de Oro/Casa de Oro comparisons (2023)



Compared to housing pricing, income levels in Valle de Oro/Casa de Oro do not support the recommended 28% of pre-tax income spent on mortgage; Valle de Oro/Casa de Oro homeowners spend on average 60.9% on mortgage payments.

Community Amenities

Community amenities represent the facilities, infrastructure, and spaces that contribute to residential quality of life. They include features like schools, parks, libraries, street trees, grocery stores, and other elements of daily necessity. The presence of these amenities, or lack thereof, can be factors influencing the demand for residential development.

"I WANT TO SEE A MORE WALKABLE COMMUNITY WITH MORE GREEN SPACES."
— VALLE DE ORO/CASA DE ORO RESIDENT

The Valle de Oro/Casa de Oro area is served by San Diego Metropolitan Transit System (MTS) bus stops, primarily along Campo Road and Bancroft Drive.

Additional neighborhood amenities were analyzed based on a three-mile trade ring from the center of the DFA area. The trade ring contains an ample number of schools/educational facilities, neighborhood parks/recreation, and grocery stores and pharmacies. Notably, the trade ring includes several MTS bus stops and the Spring Street Trolley Station. The presence of these public transit amenities provides an opportunity to increase transit ridership and provide additional public transit infrastructure. Sharp Grossmont Hospital, the largest hospital in East San Diego County, is also within the trade ring. Additionally, the Grossmont Center regional mall is located within the trade ring and contains retail anchors such as Target, Macy's, Walmart, and Barnes & Noble. It is noted that many of the public transit and neighborhood amenities within the trade ring are concentrated west of the DFA area within the cities of Lemon Grove and La Mesa. A full list of communities can be found in Table 14 and are represented geographically in Maps 19 and 20.

Table 14. Valle de Oro/Casa de Oro Community Amenities – Trade Ring (3-miles to center of DFA area)

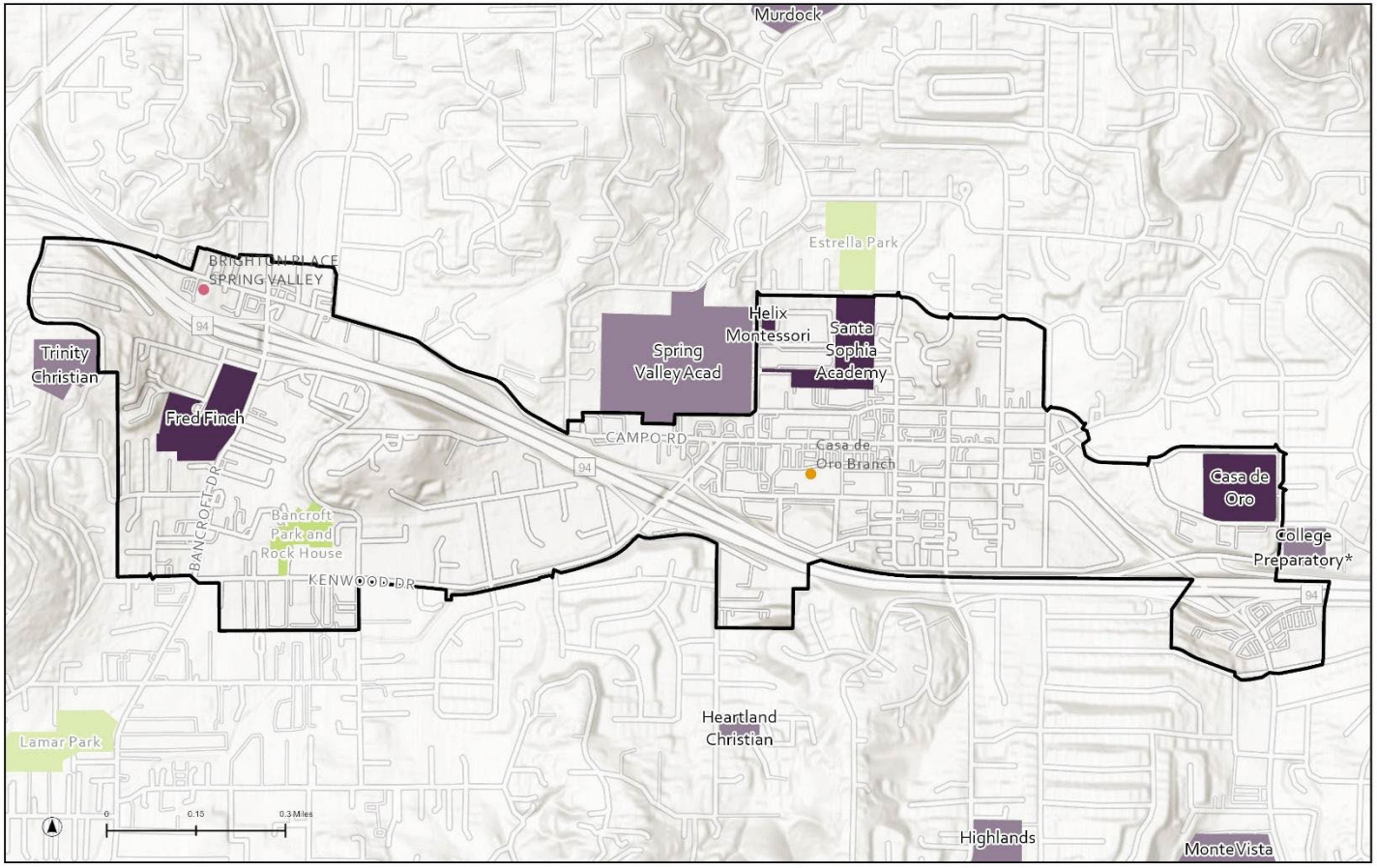
Amenity Category	Amenity
Public Transit	• MTS bus stops • MTS Trolley Stations (Massachusetts Avenue Station, Lemon Grove Depot, Spring Street Station, La Mesa Trolley Station, Grossmont Trolley Station, and Amaya Trolley Station)
Schools/Educational Facilities	• JCS Manzanita Elementary • Lemon Grove Academy Elementary School • Spring Valley Elementary School • Avondale Elementary School • Highlands Elementary School

Table 14. Valle de Oro/Casa de Oro Community Amenities – Trade Ring (3-miles to center of DFA area)

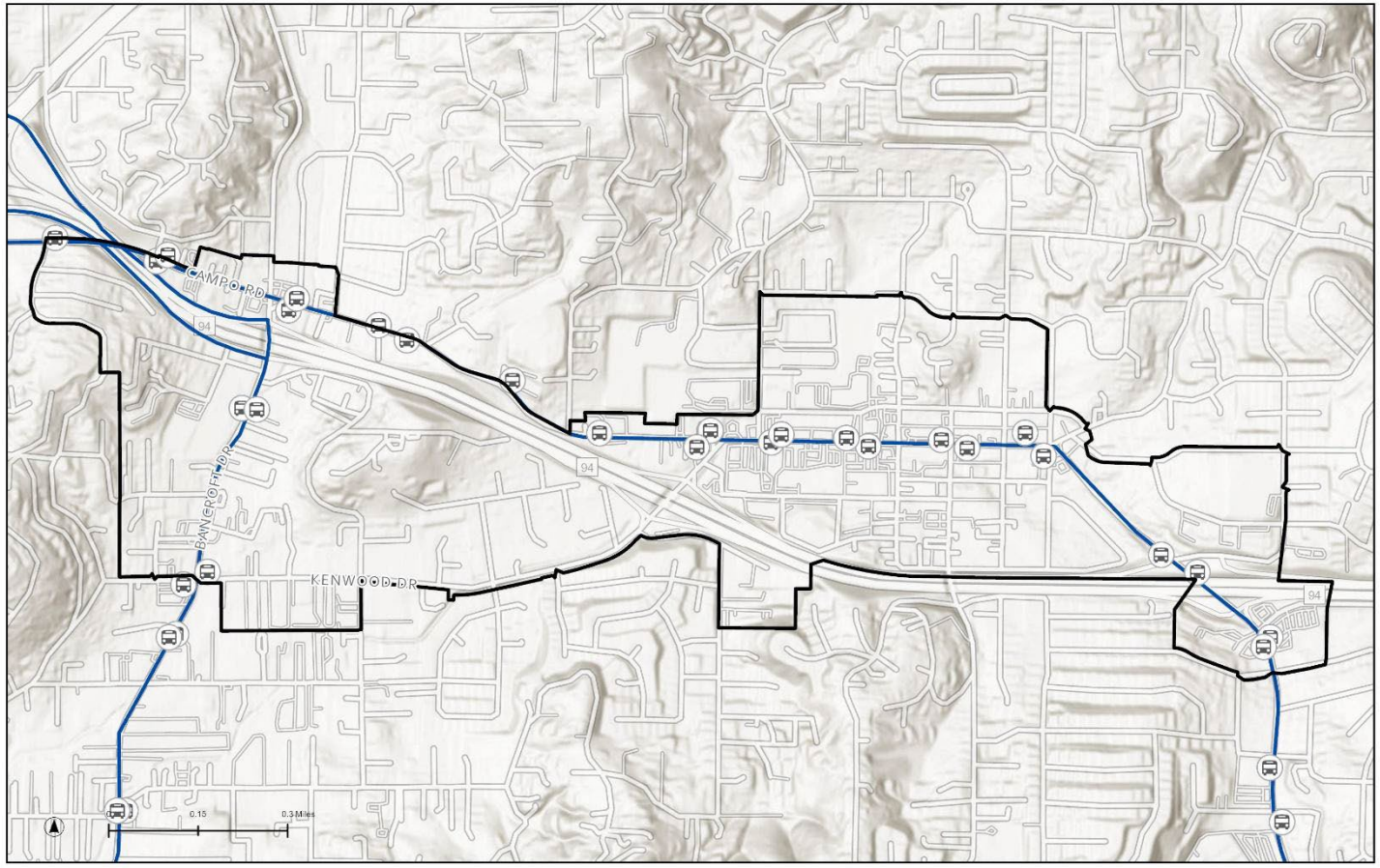
Amenity Category	Amenity
	• Loma Elementary School • College Preparatory Middle School • Helix Charter High School • Mount Miguel High School • Acton Academy San Diego East • Trinity Christian School • Perelandra College
Hospital/Medical Centers	• Sharp Grossmont Hospital • La Mesa Medical Plaza • Chase Avenue Family Health Center • Grossmont Spring Valley Family Health Center • Lemon Grove Family Health Center
Neighborhood Parks/Recreation	• Dictionary Hill County Preserve • Mount Helix Park • Eucalyptus Park • Harry Griffen Park • La Mesita Park • Jackson Park • Highwood Park • Berry Street Park • Lemon Grove Park • Sweetwater Place County Park • East County Community Center
Grocery Stores and Pharmacies	• Albertsons • Grocery Outlet • Vons • Sprouts • Food4Less

Source: Keyser Marston Associates (KMA)

Map 19. Valle de Oro/Casa de Oro Community Amenities



Map 20. Valle de Oro/Casa de Oro Transit



Data gathered from SanGIS in May 2024

Valle de Oro/Casa de Oro Transit

DFA Boundary
Transit Stops
Transit Routes
Bus

Current Infrastructure

Valle de Oro/Casa de Oro Roadways

The majority of this DFA area is served by public roads, with only a few minor private roads. Private roads can pose challenges to new development, as there may be inconsistent maintenance, varying road conditions, and unknown fees. Therefore, it is recommended for new development to occur along County-maintained public roads. Alternatively, public road access could be provided via easements or other means.

The Department of Public Works' (DPW) Infrastructure Gap Analysis Report (Exhibit B) identified roadways that provided connections to key points of interest within Valle de Oro/Casa de Oro and provided recommendations for road corridor transformations to improve pedestrian and bicycle infrastructure for a more vibrant community space. The recommendations listed below are preliminary and require further analysis and assessment of constraints. The following is a summary of the recommended roadways and improvement investments in Valle de Oro/Casa de Oro from the Infrastructure Gap Analysis Report:

- **Bancroft Drive**, from Campo Road to Kenwood Drive: enhance bikeability by adding a Class II bike lane including a buffer between travel lanes. Additional investments include adding a median, a parkway, and increasing the right-of-way width to 60–74 feet.
- **Campo Road**, from Bancroft Drive to Camino Paz: enhance walkability and bikeability by adding Class II bike lanes to both sides of the street, adding buffers between the bike lanes and the travel lane, and adding parkways and sidewalks. Additional investment includes increasing the right-of-way width to 84–98 feet.
- **Campo Road**, from Camino Paz to Rogers Road: enhance walkability and bikeability by adding Class II bike lanes to both sides of the street, adding buffers between the bike lanes and the travel lane, and adding parkways and sidewalks.
- **Campo Road**, from Rogers Road to Ramona Drive: enhance walkability and bikeability by adding Class III bike lanes to both sides of the street, adding buffers between the bike lanes and the parking, and adding parkways. Additional investment includes increasing the right-of-way width to 92–106 feet, adding a median, and adding angled parking.
- **Conrad Drive**, from Campo Road to Sierra Madre Road: enhance walkability by adding sidewalks and parkways.

For more information on the changes identified, see the Water and Sewer Infrastructure Analysis (Exhibit B). For the existing roadways, see Map 21.

Valle de Oro/Casa de Oro Water Service

Water services within the Valle de Oro/Casa de Oro DFA area are provided by the Helix Water District. Water service consists of backbone transmission mains with distribution mains serving areas of potential development. See Exhibit B for more information and Map 22 for existing pipes.

Valle de Oro/Casa de Oro Sewer Service

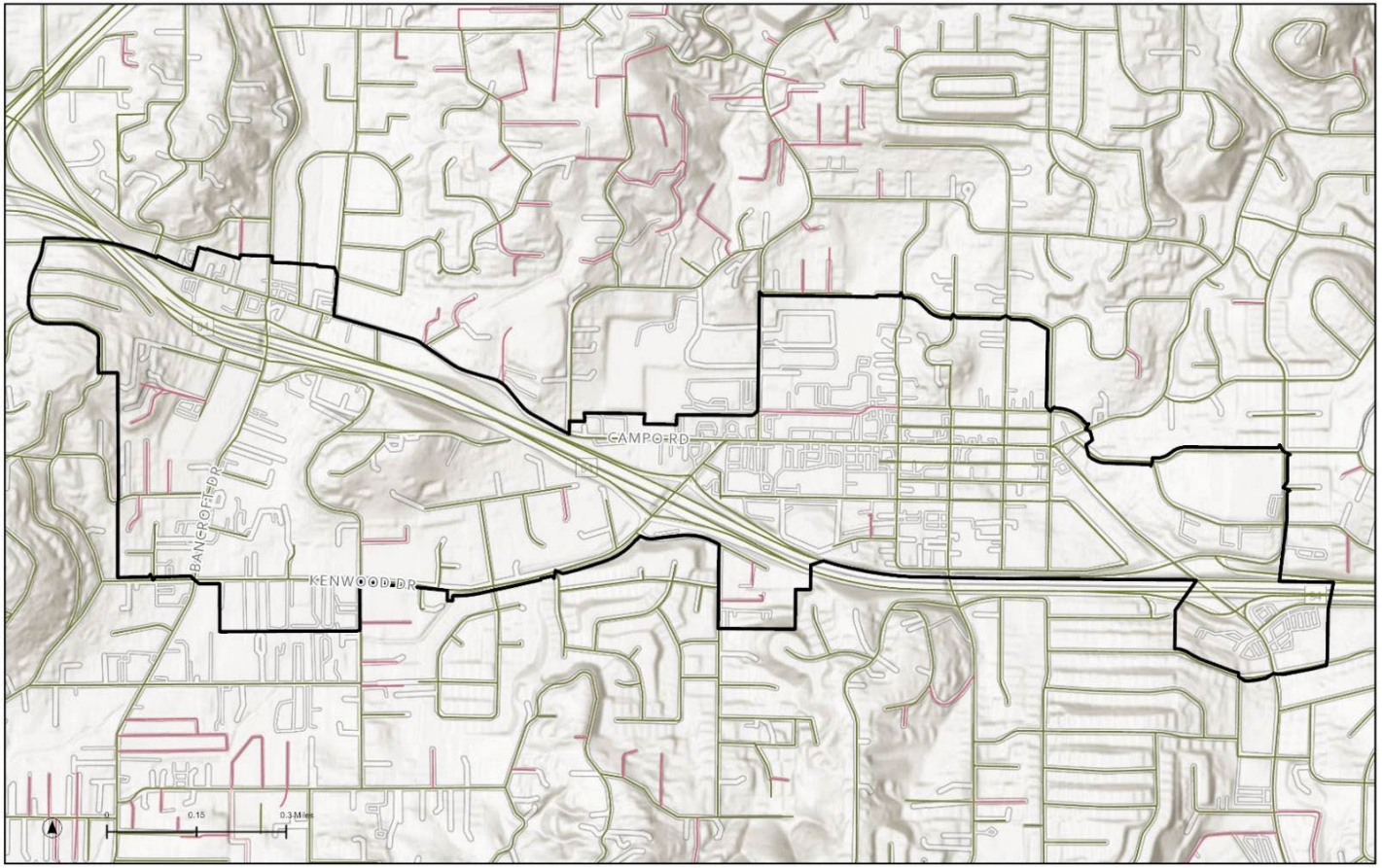
Sewer services within the Valle de Oro/Casa de Oro DFA area are provided by the County of San Diego Sanitation District. Areas of development potential are either served by existing sewer mains or adjacent trunk mains. See Exhibit B for more information and Map 23. The following are recommendations for sewer service in Valle de Oro/Casa de Oro:

- An "Existing Conditions Analysis for Campo Road Revitalization" report, dated February 2020, prepared by Michael Baker International, was reviewed as part of this study and notes a portion of sewer main along Campo Road as potentially at capacity, and due to age, in need of replacement and upsizing. This improvement project has not been completed to date and would be recommended to improve the Campo Drive sewer main. Timing would match the adjacent potential development area (short- to mid-term). The construction cost is estimated at $3,360,000 per the Michael Baker report.

Valle de Oro/Casa de Oro Stormwater Infrastructure

The Valle de Oro/Casa de Oro DFA area lies within Special Drainage Area 2 (SDA-2), the Valle de Oro SDA. No major flood control or stormwater management facilities are currently planned within the DFA, as no major deficiencies have been identified. Individual development projects are required to comply with County requirements regarding retention of stormwater runoff onsite for both flood control and stormwater quality control purposes. Also, County Ordinance No. 7 (June 24, 1991) requires the payment of drainage fees as a condition for issuing any building permit.

Map 21. Valle de Oro/Casa de Oro Roads



Data gathered from SanGIS in May 2024

Valle de Oro/Casa de Oro Roads

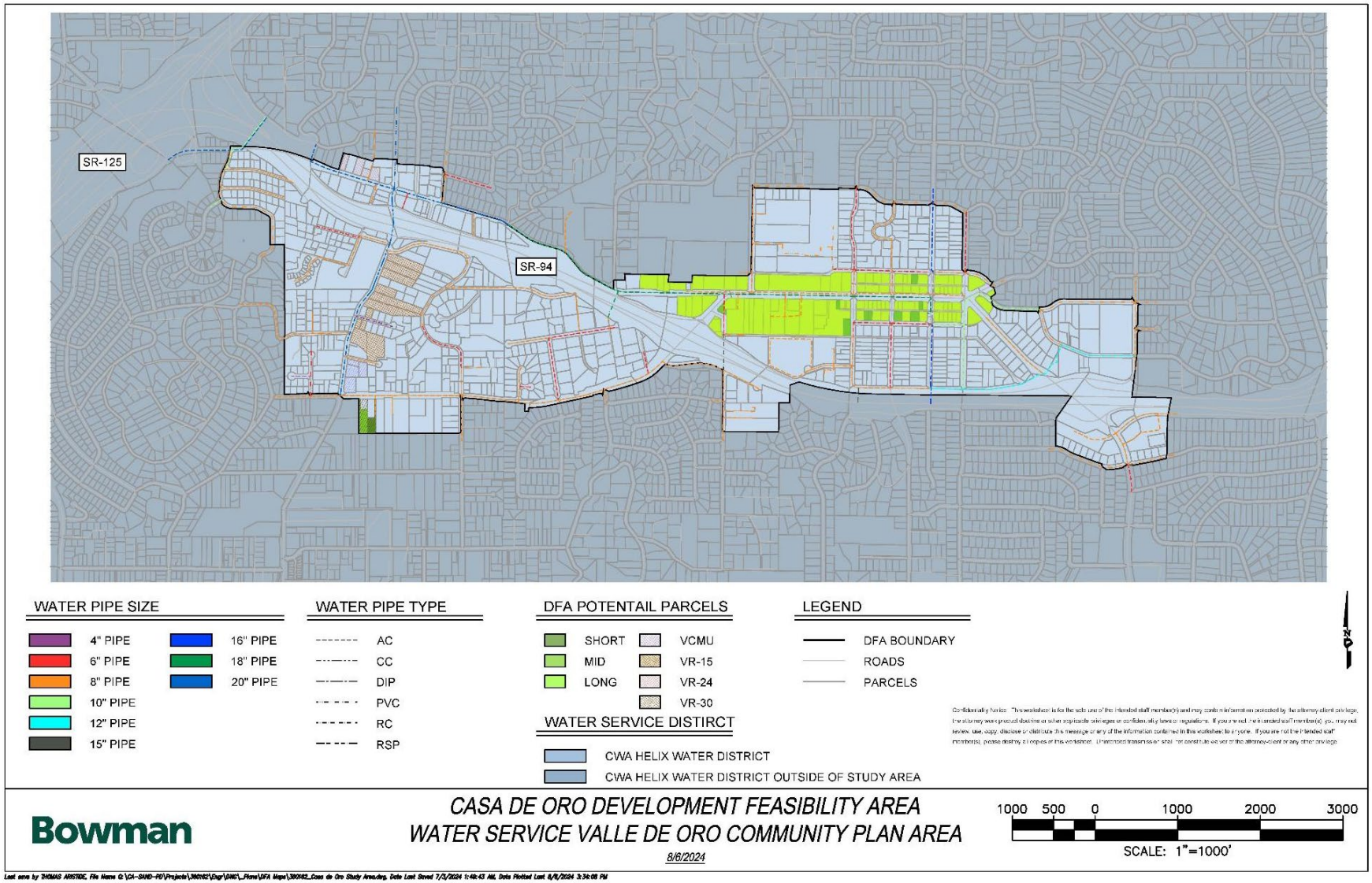
DFA Boundary

Dedicated

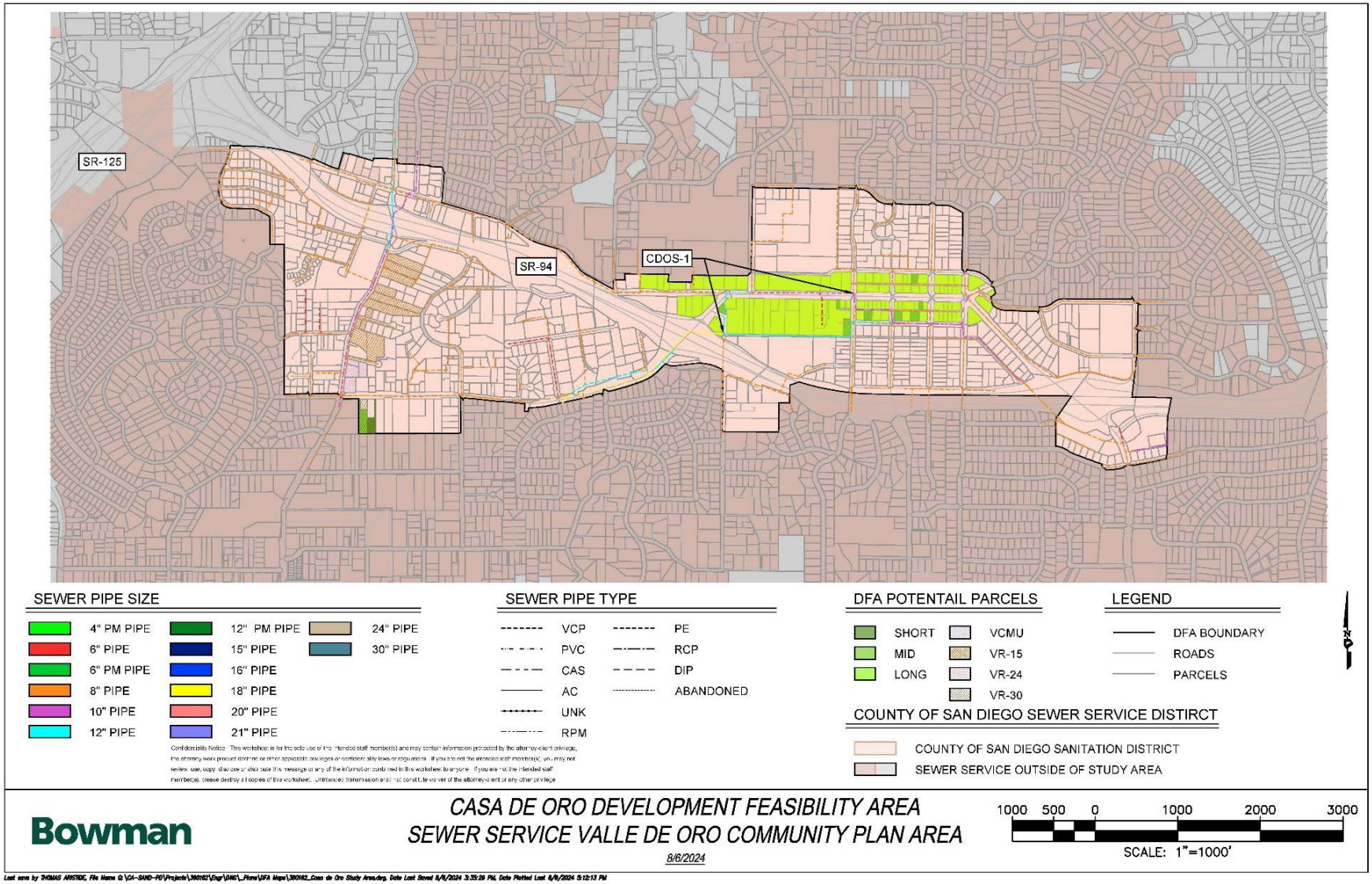
Private street

Undedicated

Map 22. Valle de Oro/Casa de Oro Water Service



Map 23. Valle de Oro/Casa de Oro Sewer Service



Housing Market Assessment

The following section provides a snapshot of opportunities, constraints, and the housing market analysis for Valle de Oro/Casa de Oro. Information for this section was sourced from the Market Feasibility Assessment created in June 2024 by Keyser Marston Associates (KMA). For more detailed information on residential market trends, see Exhibit C.

Existing Conditions

The DFA area can generally be characterized by its commercial corridor surrounded by urban and single-family residential. Existing General Plan land uses include General Commercial, Limited Impact Industrial, Neighborhood Commercial, Office Professional, Public/Semi-Public Facilities, Village Core Mixed Use, and Village Residential. Current zoning within the DFA area includes General Commercial (C36), Heavy Commercial (C37), Specific Plan (S88), Single-Family Residential (RS), Urban Residential (RU), Limited Industrial (M52), and Transportation and Utility Corridor (S94). Current allowable densities in the General Commercial and Heavy Commercial areas range from 7 to 40 DUs per acre.

The DFA area is also reflected within the Valle de Oro Community Plan and the Campo Road Corridor Revitalization Specific Plan (adopted in January 2023). The Specific Plan covers 60 acres centered on Campo Road between Rogers Road and Granada Avenue that serve as the commercial and civic center of the Calle de Oro/Casa de Oro community. The maximum allowable density for both residential and non-residential development is a 2.0 floor area ratio (FAR) for the Main Street District (parcels adjacent to the sidewalk north and south of Campo Road) and 1.0 for the Gateway District (parcels at the major entrances at the intersections of Campo Road with Kentwood Drive and Granada Avenue).

"I'D LIKE TO SEE GROWTH THAT IS HOLISTIC AND CONSIDERS THE CURRENT CHARACTERISTICS OF THE NEIGHBORHOOD."

— VALLE DE ORO/CASA DE ORO RESIDENT

Residential Market Trends and Projected Demand in Housing Units

Tables 15 and 16 depict the projected housing unit demand, as well as the potential residential development typologies for the Valle de Oro/Casa de Oro DFA area. Supportable market demand is evaluated in the near-term (0 to 5 years), mid-term (5 to 10 years), and long-term (10 or more years). In addition, the following metrics were used as part of this evaluation: "strong" meaning highly likely to occur, "moderate" meaning likely to occur, and "weak" meaning unlikely to occur.

Table 15. Valle de Oro/Casa de Oro Projected Housing Unit Demand (2025–2050)		
Capture Level	Total Units	Units / Year
Low Capture	1,373 units	55 units / year
High Capture	1,831 units	73 units / year

Table 16. Valle de Oro/Casa de Oro Market Support for Residential Typologies				
Capture Level	Units / Year	Near-Term (0–5 years)	Mid-Term (5–10 years)	Long-Term (10+ Years)
For-Sale Residential Development Typologies				
Townhomes	15–20 units / acre	Moderate	Moderate	Strong
Rental Residential Development Typologies				
Stacked Flat with Tuck-Under Parking	30+ units / acre	Weak	Moderate	Strong
Garden-Style Apartments	20–25 units / acre	Moderate	Moderate	Strong

Housing Development Financial Feasibility

Market-Rate Housing Development Financial Feasibility

This section provides a snapshot of housing prototypes and feasibility based on residential land values and was sourced from the Valle de Oro/Casa de Oro Financial Feasibility Analysis created in June 2024 by Keyser Marston Associates (KMA). For more detailed information on housing development financing trends, see Exhibit D.

Each residual land value model incorporated estimates of development costs, market rents/values, and target developer returns reflective of recent comparable projects and available market and industry data. Development prototypes that make financial sense generate positive residual land values that indicate that a developer or investor could acquire the site, construct the development, sell or lease the completed development, and receive at least an industry standard target return on their investment. Table 17 depicts the housing types evaluated in Valle de Oro/Casa de Oro. As seen in Table 18, attached townhomes and garden-style apartments make the most financial sense.

Table 17. Valle de Oro/Casa de Oro Summary of Development Prototypes

Development Prototype	Illustrative Example	General Project Description
A **Attached Townhomes**		• 3.72-acre site • 20 units/gross acre • For-sale housing • 74 units • 2-3 stories • Attached garages • 1,399 SF average unit size
B **Attached Townhomes w/Ground Floor Commercial**		• 0.55-acre site • 24 units/gross acre (Village Core Mixed-Use) • For-sale housing • 13 units • 1,000 SF commercial SF • 3 stories • Surface and attached garages • 1,250 SF average unit size
C **Garden Apartments**		• 1.47-acre site • 20 units/gross acre (Village Residential 20) • Rental housing • 29 units • 2-3 stories • Surface, carports, and attached garages • 930 SF average unit size
D **Stacked Flat w/Ground Floor Commercial and Surface/Tuck-Under Parking**		• 1.47-acre site • 35 units/gross acre (Village Core Mixed-Use) (1) • Rental housing • 51 units • 1,000 SF commercial space • 3-4 stories • Surface and tuck-under parking • 820 SF average unit size
E **Stacked Flat w/Ground Floor Commercial and Surface/Tuck-Under Parking (Non-Contiguous Site)**		• 0.82-acre site • 40 units/gross acre (Village Core Mixed-Use) (1) • Rental housing • 32 units • 1,000 SF commercial space • 3-4 stories • Surface and tuck-under parking • 769 SF average unit size

(1) Per the Campo Road Corridor Revitalization Specific Plan (Plan) dated January 2023, Main Street District development standards are as follows: maximum FAR of 2.0; maximum of 4 stories; and maximum building height of 62 feet. Therefore, KMA increased the density to maximize the housing unit count within the maximum 4 stories as permitted in the Plan.

Table 18. Valle de Oro/Casa de Oro Residual Land Values by Development Prototype

Product Type	A Attached Townhomes	B Attached Townhomes w/Ground Floor Commercial	C Garden Apartments	D Stacked Flat w/Ground Floor Commercial and Surface/ Tuck-Under Parking	E Stacked Flat w/Ground-Floor Commercial and Surface/ Tuck-Under Parking (Non-Contiguous Site)
Tenure	For-Sale	For-Sale	Rental	Rental	Rental
Site Size (Gross)	3.72 Acres	0.55 Acres	1.47 Acres	1.47 Acres	0.82 Acres
Residual Land Value (2024 $)	$4,936,000 $67,000/Unit $30/SF Site (1)	$989,000 $76,000/Unit $41/SF Site (1)	$1,278,000 $44,000/Unit $20/SF Site (1)	($2,188,000) ($43,000)/Unit ($34)/SF Site (1)	($1,900,000) ($59,000)/Unit ($53)/SF Site (1)
Financial Feasibility Outcome	Strong Positive	Strong Positive	Strong Positive	Negative	Negative

(1) Reflects residual land value per SF of gross site area.

Land Use Analysis

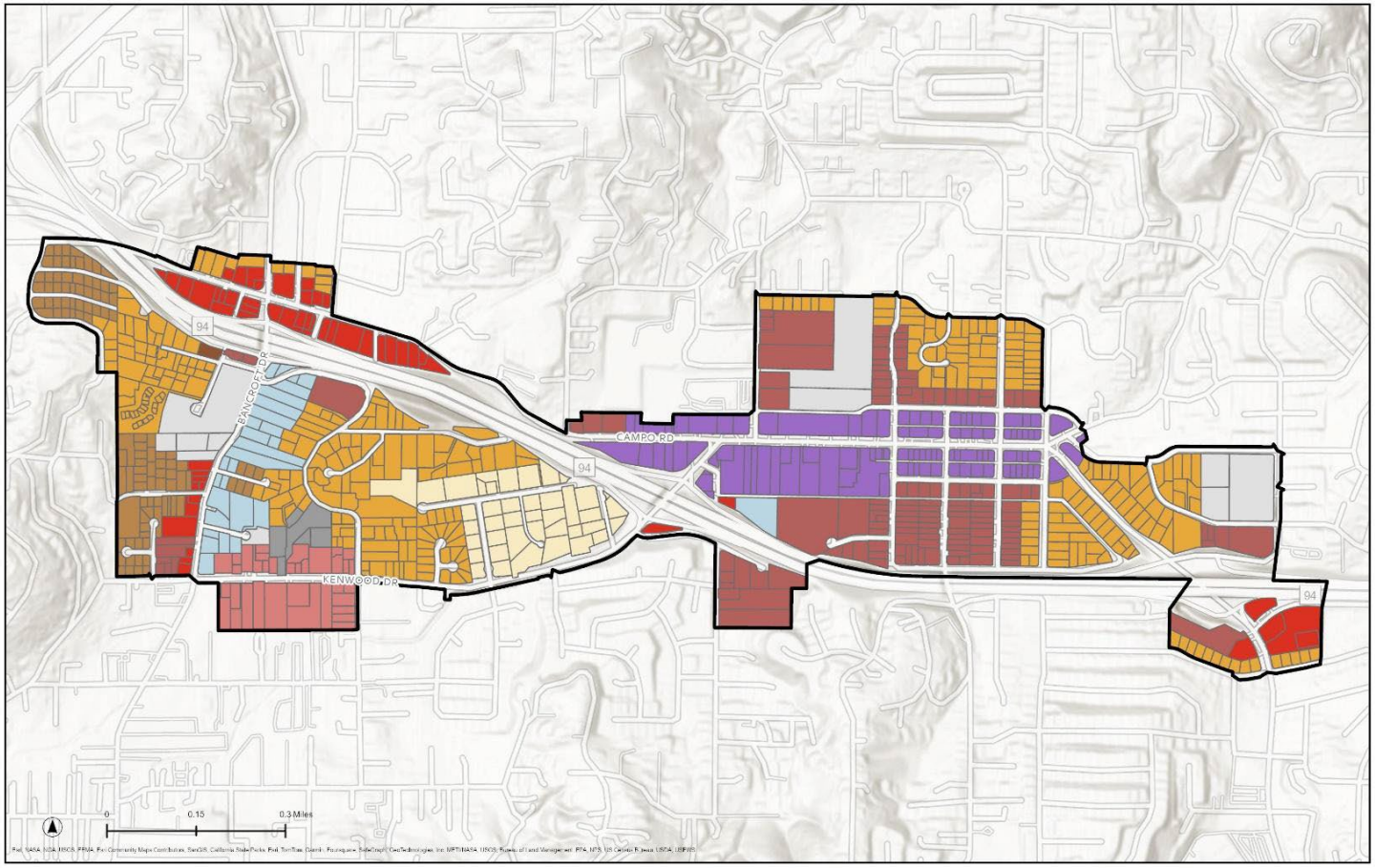
Current Land Use Policy

The Valle de Oro/Casa de Oro DFA area consists of 909 parcels, within a total of 518 acres, mostly developed with residential uses. Unique from other DFA areas, a Specific Plan (2023 Campo Road Corridor Revitalization Specific Plan) applies to a portion of Valle de Oro/Casa de Oro. The Specific Plan area is planned as Village Core Mixed Use (VC-30). A full list of current land use designations and distributions can be found in Table 19 and Map 24.

As shown on Map 25, Valle de Oro/Casa de Oro has fairly low utilization of its land, with 40% of parcels identified as having low Building-to-Land-Value (BLV) (ratio <1). BLV compares the assessed improvement value to the assessed land value. Land values that are higher than improvement values are generally seen as “underutilized lands,” which may be more amenable to redevelopment.

Table 19. Valle de Oro/Casa de Oro DFA area's Current Land Use Designations		
Land Use Designation	Valle de Oro/Casa de Oro Parcel Count	Percentage of Total Parcels
GENERAL COMMERCIAL	54	5.9%
NEIGHBORHOOD COMMERCIAL	-	0.0%
OFFICE PROFESSIONAL	-	0.0%
LIMITED IMPACT INDUSTRIAL	30	3.3%
MEDIUM IMPACT INDUSTRIAL	-	0.0%
OPEN SPACE (CONSERVATION)	-	0.0%
OPEN SPACE (RECREATION)	6	0.7%
PUBLIC AGENCY LANDS	-	0.0%
PUBLIC/SEMI-PUBLIC FACILITIES	15	1.7%
SEMI-RURAL RESIDENTIAL (SR-1)	-	0.0%
SEMI-RURAL RESIDENTIAL (SR-4)	-	0.0%
VILLAGE RESIDENTIAL (VR-2)	41	4.5%
VILLAGE RESIDENTIAL (VR-2.9)	2	0.2%
VILLAGE RESIDENTIAL (VR-4.3)	373	41.0%
VILLAGE RESIDENTIAL (VR-7.3)	110	12.1%
VILLAGE RESIDENTIAL (VR-10.9)	-	0.0%
VILLAGE RESIDENTIAL (VR-15)	1	0.1%
VILLAGE RESIDENTIAL (VR-20)	35	3.9%
VILLAGE RESIDENTIAL (VR-24)	139	15.3%
VILLAGE RESIDENTIAL (VR-30)	-	0.0%
VILLAGE CORE MIXED USE (VC-30)	103	11.3%
SPECIFIC PLAN AREA	-	0.0%
TOTAL	909	100%

Map 24. Valle de Oro/Casa de Oro Land Use Designations (General Plan)



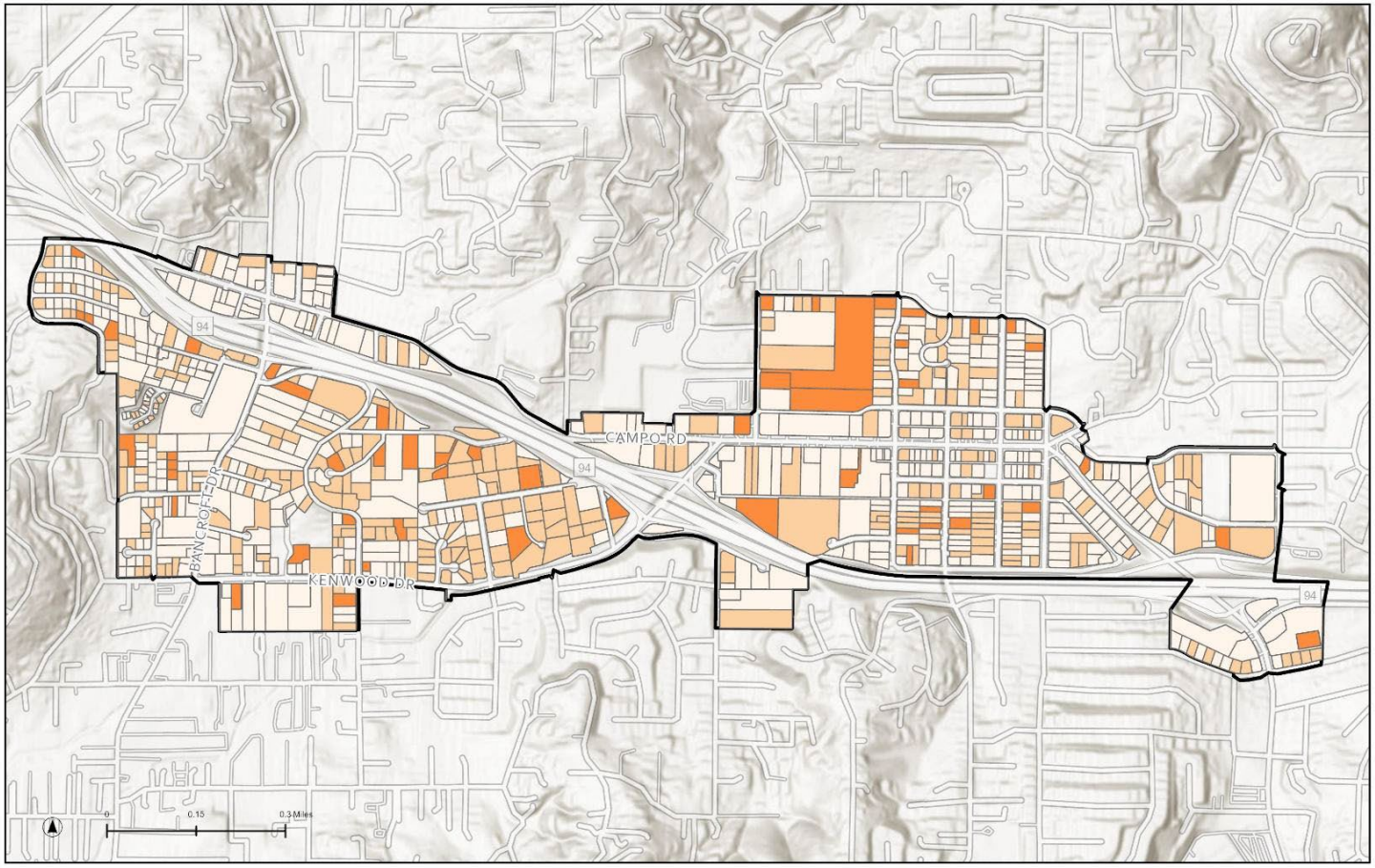
Data gathered from SanGIS in May 2024

Valle de Oro/Casa de Oro Land Use

General Plan Land Use

- GENERAL COMMERCIAL
- LIMITED IMPACT INDUSTRIAL
- MEDIUM IMPACT INDUSTRIAL
- NEIGHBORHOOD COMMERCIAL
- OFFICE PROFESSIONAL
- OPEN SPACE (CONSERVATION)
- OPEN SPACE (RECREATION)
- PUBLIC AGENCY LANDS
- PUBLIC/SEMI-PUBLIC FACILITIES
- SEMI-RURAL RESIDENTIAL (SR-1)
- SEMI-RURAL RESIDENTIAL (SR-4)
- SPECIFIC PLAN AREA
- VILLAGE CORE MIXED USE
- VILLAGE RESIDENTIAL (VR-2)
- VILLAGE RESIDENTIAL (VR-2.9)
- VILLAGE RESIDENTIAL (VR-4.3)
- VILLAGE RESIDENTIAL (VR-7.3)
- VILLAGE RESIDENTIAL (VR-10.9)
- VILLAGE RESIDENTIAL (VR-15)
- VILLAGE RESIDENTIAL (VR-20)
- VILLAGE RESIDENTIAL (VR-24)
- VILLAGE RESIDENTIAL (VR-30)

Map 25. Valle de Oro/Casa de Oro Building-to-Land-Value (BLV)



Data gathered from SanGIS in May 2024

Valle de Oro/Casa de Oro BLV

DFA Boundary

BLV (Improvement/Land Value)

0 - 1

2 - 3

4 - 10

11 - 42

43 - 110

Housing Development

The housing density within Valle de Oro/Casa de Oro is lower than what is permitted under current General Plan land use. As of 2024, there are 2,174 DUs within the Valle de Oro/Casa de Oro DFA area.[1] Map 26 demonstrates the DU distribution. An objective of this study is to uncover ways to increase that number, while still providing high quality of life to current and future residents and addressing environmental constraints of the area.

Environmental Constraints

Environmental conditions can affect where housing can go. Certain environmental constraints can prevent development from occurring in certain areas, while other constraints are barriers that can be overcome. To account for the effect of environmental constraints on housing viability, certain constraining factors were considered. This study evaluated earthquake fault zones, airport hazard zones, airport noise, floodplains, wetlands, forest conservation, habitat preserve, environmentally sensitive areas, South County Multiple Species Conservation Program (MSCP) Pre-Approved Mitigation Areas, publicly owned lands, and slope as constraining factors to housing development. These constraints were considered in determining DU yield and in selecting parcels ideal for zoning modifications as part of future efforts.

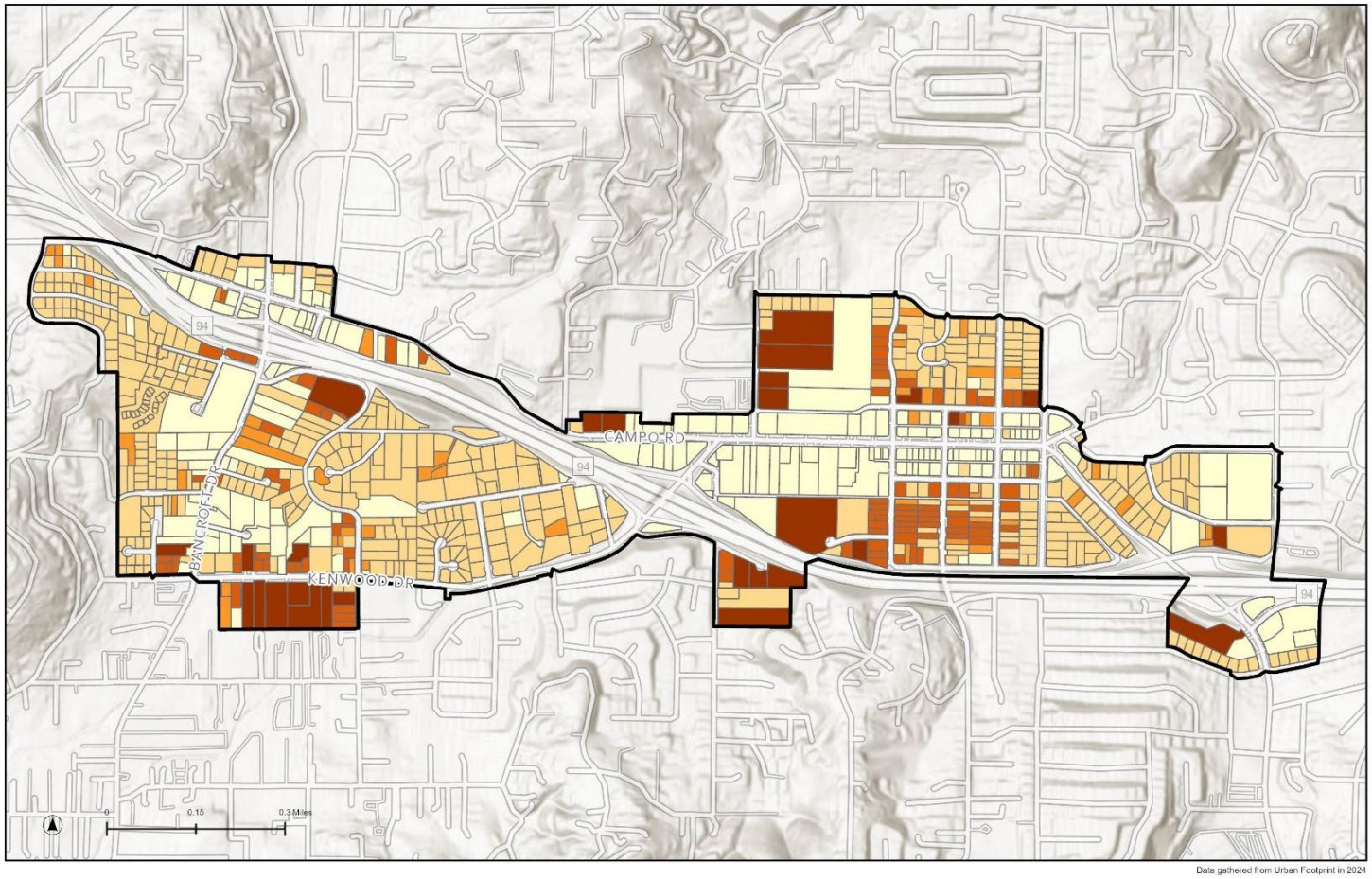
Fire risk was not included as a constraining factor, despite a large portion of the DFA area flagged by CalFire as "Very High" and "High" hazard severity zones. Acknowledging this current and growing risk, current County fire mitigation measures demote this factor as an environmental constraint for analysis purposes. Further efforts supporting wildfire planning and risk reduction are recommended to address increasing wildfire risk severity throughout the region.

The main environmental constraints to housing development in Valle de Oro/Casa de Oro are slope and floodplains, covering 5% and 4% of the DFA area, respectively. Maps 27 and 28 demonstrate these constraints geographically. These items can be mitigated to a reasonable degree for a cost. While risk and cost tolerance will vary depending on the developer, the buyer, and the market, it is the intention of this study to consider the most feasible options, i.e., the parcels that pose lowest risk and highest potential for development.

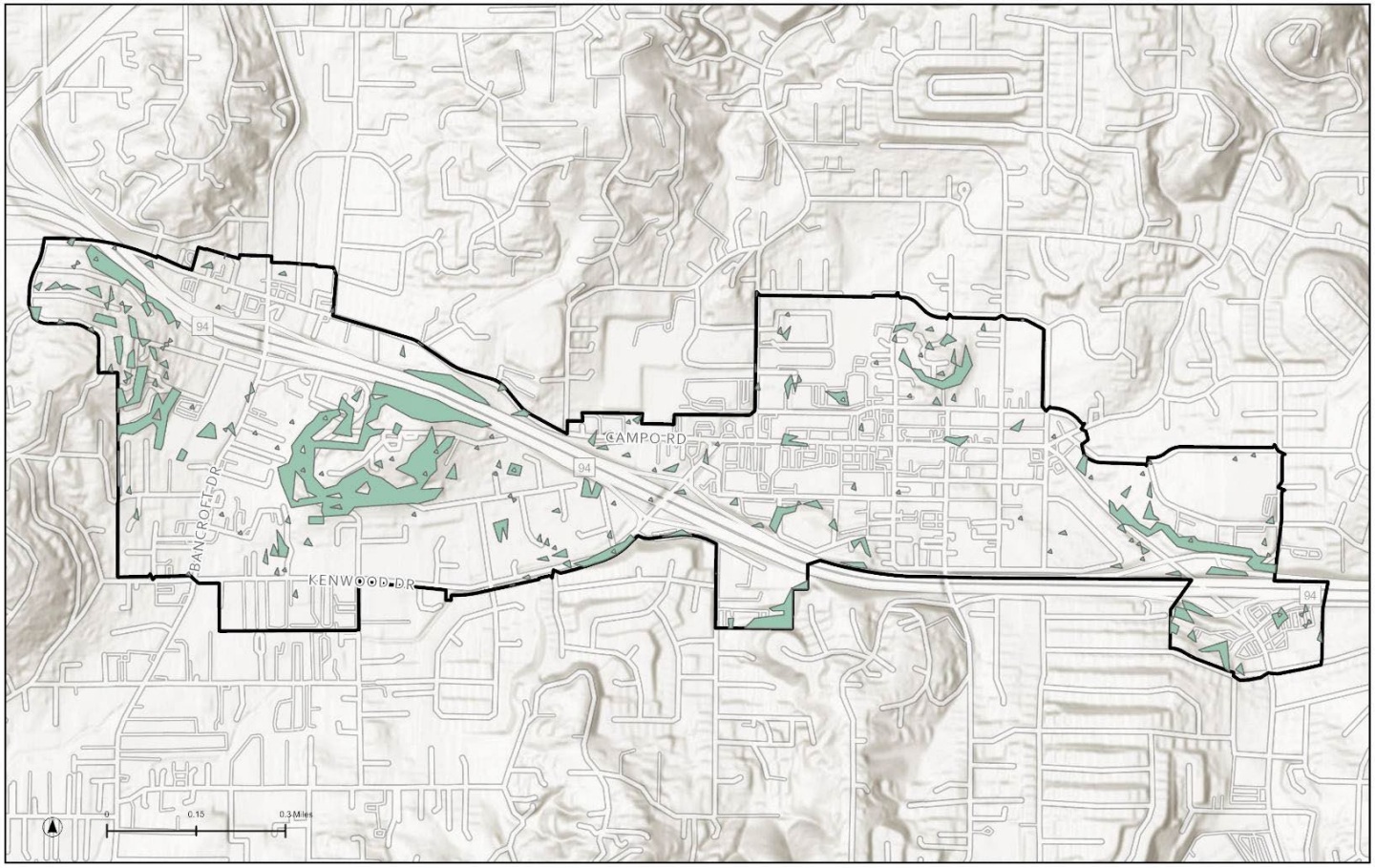
"FLOODING IS A GROWING ISSUE IN THIS NEIGHBORHOOD."
– VALLE DE ORO/CASA DE ORO RESIDENT

[1] Current dwelling unit data sourced from UrbanFootprint.

Map 26. Valle de Oro/Casa de Oro Actual Existing DUs (n=2,174)



Map 27. Valle de Oro/Casa de Oro Topographic Slope

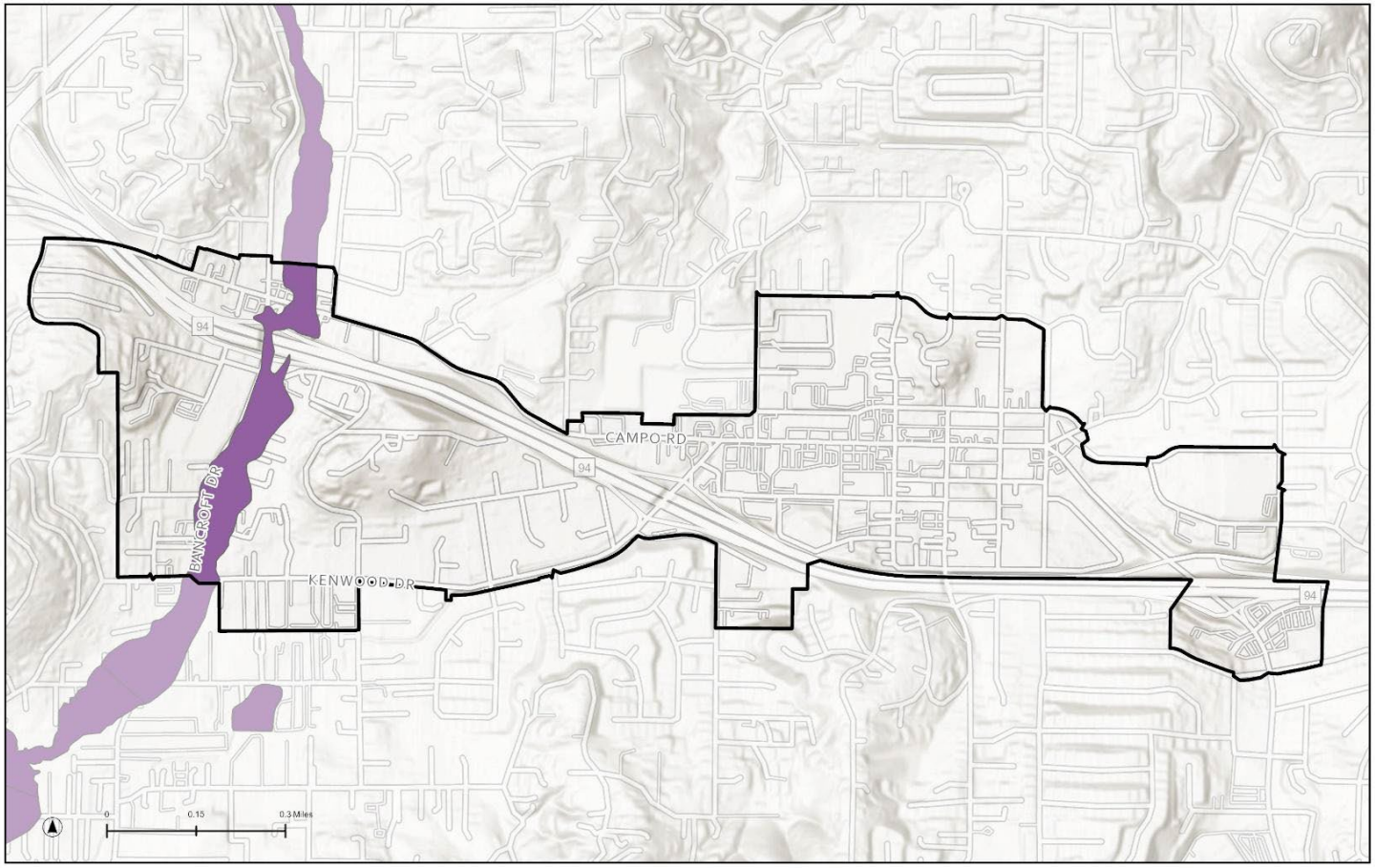


Data gathered from SanGIS in May 2024

Valle de Oro/Casa de Oro Slope

Areas of slope greater than 25%

Map 28. Valle de Oro/Casa de Oro Floodplains



Data gathered from SanGIS in May 2024

Valle de Oro/Casa de Oro Flood Hazard

DFA Boundary

1-percent-annual-change

Land Use Alternatives

To explore the impact of land use designations on housing development, three alternative scenarios of land use were prepared for each DFA area. This analysis is largely independent of the market analysis. The land use analysis revealed that current General Plan land use designations are not being fully utilized, meaning that increasing capacity alone would not necessarily lead to more housing development. Instead, it could artificially drive-up costs. To ensure a balanced approach, any proposed land use amendments must be evaluated holistically. The findings from this analysis will be shared with the County's Framework project to inform their review of land use designations. However, before any changes to land use are made, the key barriers identified in this report (see Chapter 7) must first be addressed.

Under each alternative scenario, a modification of allowable dwelling units (DU) is unlocked. While this increase represents potential rather than actual, it is a strong supporter of housing development in unincorporated county areas if coupled with other improvements and incentives. Table 20 summarizes actual existing DUs that are already built out (2024 Actual), expected unit yield under current zoning with no changes (Alternative 0), and expected unit yield under three alternatives that vary in intensity of modifications (Alternatives 1, 2, and 3). The land use alternative options see a shift in allowable DUs. DU yields factor in land use designations, density allowances, unconstrained land acreage, yield factors, vacancy, and redevelopment potential. For more information on methodology, parcel selection, and designation changes, see Exhibit E.

Table 20. Valle de Oro/Casa de Oro Dwelling Units (DU) per Alternative Scenario Summary

Dwelling Unit Yields	2024 Actual	Alternative 0	Alternative 1	Alternative 2	Alternative 3
Actual Existing DU (2024)	2,229				
DU Yield on All Unconstrained Land		2,453	2,482	2,494	2,519
DU Yield on Unconstrained Vacant Land Only		12	12	12	12
DU Yield on Unconstrained Underutilized Land only (non-vacant)[1]		830	858	870	895

1. Underutilized land refers to parcels that have a Building-to-Land Value (BLV) of less than 1. A low BLV indicates that the value of improvements is less than the value of the land, and therefore, offers a strong financial incentive to redevelop for better property value.

In the case of Valle de Oro/Casa de Oro, alternatives focused on the western portion of the area, in recognition that the west-central area has already been slated for changes under the new Campo Corridor Specific Plan. Table 21 shows scenarios by land use designation, and Maps 29, 30, 31, and 32 show the alternative scenarios geographically.

Table 21. Valle de Oro/Casa de Oro Dwelling Units on All Unconstrained Land

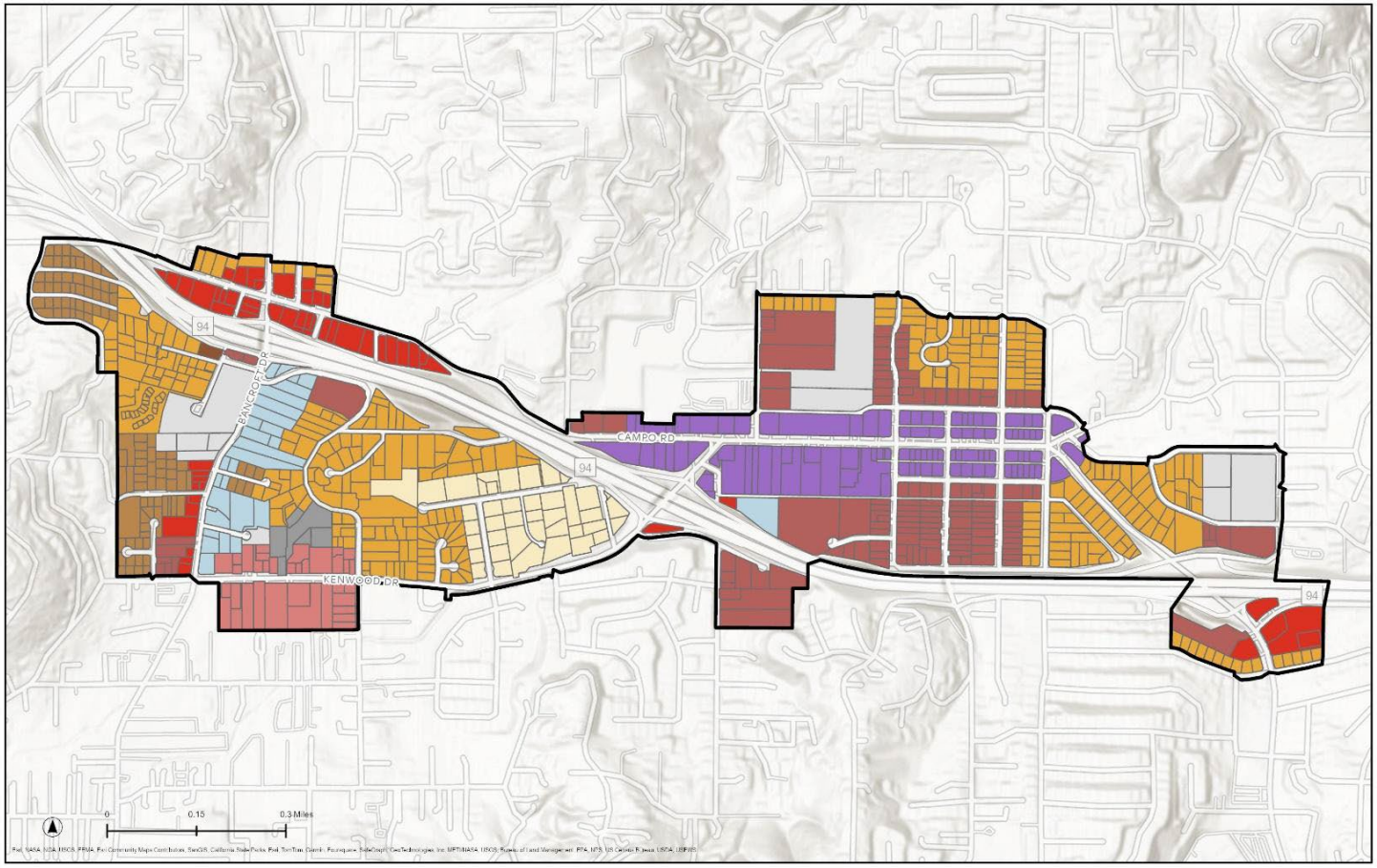
Residential Land Use Designation	DU Density	Yield Factor[1]	Actual Existing DU[2]	DU Yield Alt 0	DU Yield Alt 1	DU Yield Alt 2	DU Yield Alt 3
GENERAL COMMERCIAL	n/a	-	26	-	-	-	-
LIMITED IMPACT INDUSTRIAL	n/a	-	28	-	-	-	-
MEDIUM IMPACT INDUSTRIAL	n/a	-	-	-	-	-	-
NEIGHBORHOOD COMMERCIAL	n/a	-	-	-	-	-	-
OFFICE PROFESSIONAL	n/a	-	-	-	-	-	-
OPEN SPACE (CONSERVATION)	n/a	-	-	-	-	-	-
OPEN SPACE (RECREATION)	n/a	-	1	-	-	-	-
PUBLIC AGENCY LANDS	n/a	-	-	-	-	-	-
PUBLIC/SEMI-PUBLIC FACILITIES	n/a	-	-	-	-	-	-
SPECIFIC PLAN AREA	40 DU / acre	70%	-	-	-	-	-
SEMI-RURAL RESIDENTIAL (SR-1)	1 DU / acre	70%	-	-	-	-	-
SEMI-RURAL RESIDENTIAL (SR-4)	1 DU / 4 acres	70%	-	-	-	-	-
VILLAGE RESIDENTIAL (VR-2)	2 DU / acre	70%	38	32	32	32	32
VILLAGE RESIDENTIAL (VR-2.9)	2.9 DU / acre	70%	-	0	0	0	0
VILLAGE RESIDENTIAL (VR-4.3)	4.3 DU / acre	70%	348	286	284	284	284
VILLAGE RESIDENTIAL (VR-7.3)	7.3 DU / acre	70%	108	102	102	102	102
VILLAGE RESIDENTIAL (VR-10.9)	10.9 DU / acre	70%	-	-	-	-	-

VILLAGE RESIDENTIAL (VR-15)	15 DU / acre	62%	6	4	4	4	28
VILLAGE RESIDENTIAL (VR-20)	20 DU / acre	73%	351	255	254	233	233
VILLAGE RESIDENTIAL (VR-24)	24 DU / acre	89%	1,285	1,374	1,405	1,405	1,405
VILLAGE RESIDENTIAL (VR-30)	30 DU / acre	76%	-	-	-	34	34
VILLAGE CORE MIXED USE	30 DU / acres	32%	38	400	400	400	401
TOTAL			2,229	2,453	2,482	2,494	2,519

1. DU calculations include yield factors, which is a percentage based on actual yield expectations. See Data Notes for more info.

2. Source: UrbanFootprint (accessed 2024).

Map 29. Valle de Oro/Casa de Oro Current Land Use (Alternative 0)



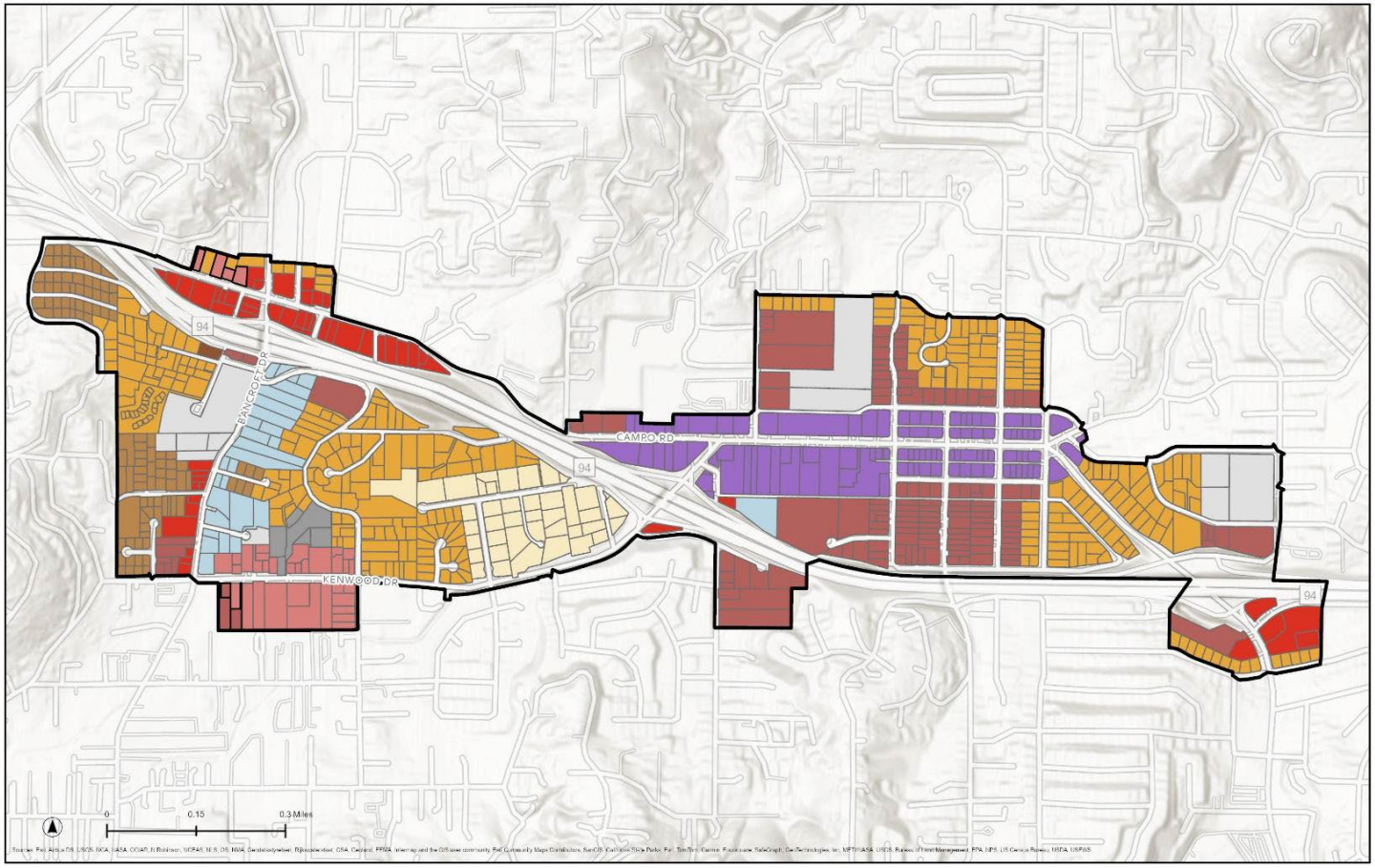
Data gathered from SanGIS in May 2024

Valle de Oro/Casa de Oro Land Use

General Plan Land Use

- GENERAL COMMERCIAL
- LIMITED IMPACT INDUSTRIAL
- MEDIUM IMPACT INDUSTRIAL
- NEIGHBORHOOD COMMERCIAL
- OFFICE PROFESSIONAL
- OPEN SPACE (CONSERVATION)
- OPEN SPACE (RECREATION)
- PUBLIC AGENCY LANDS
- PUBLIC/SEMI-PUBLIC FACILITIES
- SEMI-RURAL RESIDENTIAL (SR-1)
- SEMI-RURAL RESIDENTIAL (SR-4)
- SPECIFIC PLAN AREA
- VILLAGE CORE MIXED USE
- VILLAGE RESIDENTIAL (VR-2)
- VILLAGE RESIDENTIAL (VR-2.9)
- VILLAGE RESIDENTIAL (VR-4.3)
- VILLAGE RESIDENTIAL (VR-7.3)
- VILLAGE RESIDENTIAL (VR-10.9)
- VILLAGE RESIDENTIAL (VR-15)
- VILLAGE RESIDENTIAL (VR-20)
- VILLAGE RESIDENTIAL (VR-24)
- VILLAGE RESIDENTIAL (VR-30)

Map 30. Valle de Oro/Casa de Oro Land Use Alternative 1



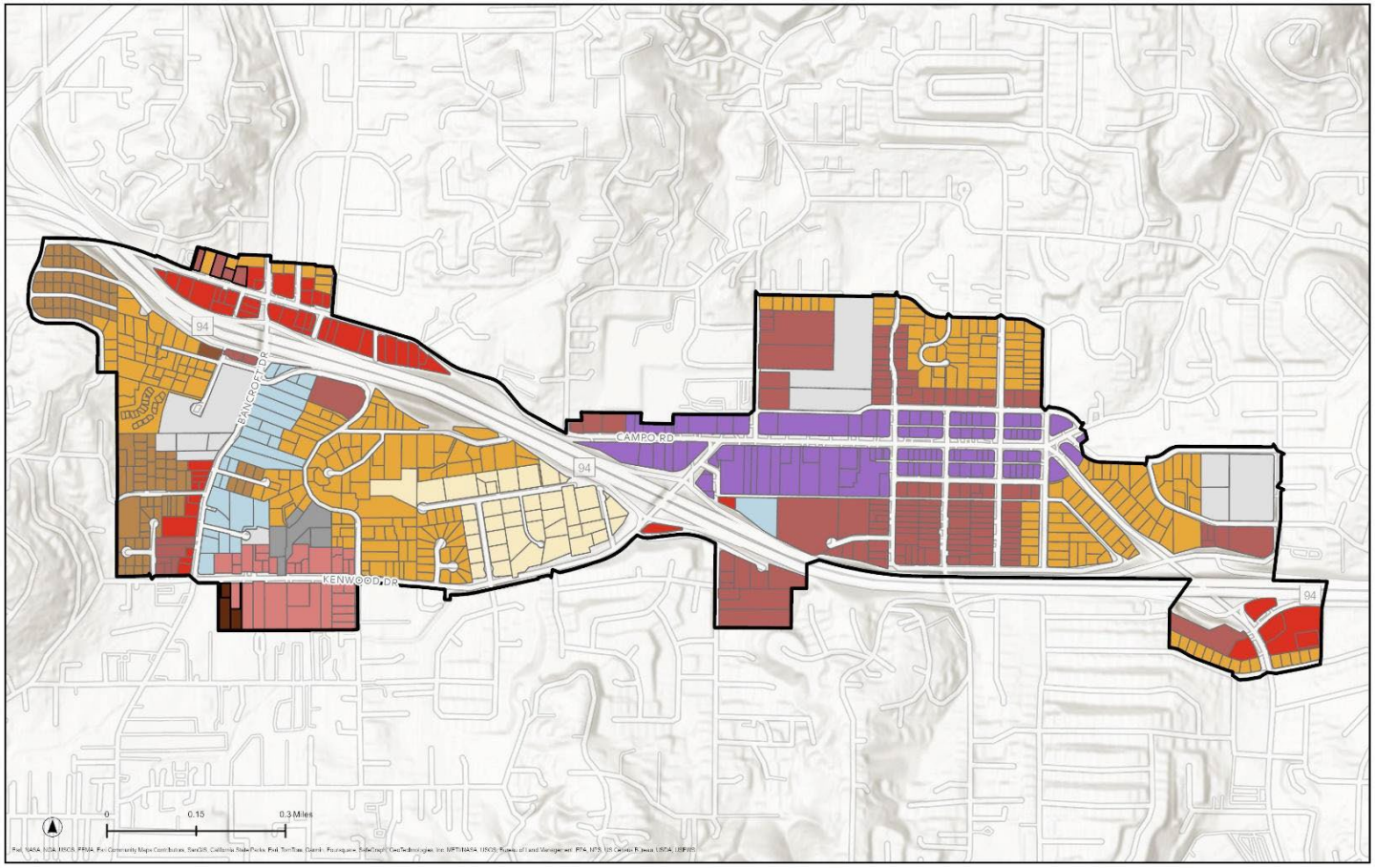
Data gathered from SanGIS in May 2024

Valle de Oro/Casa de Oro Alternative 1

Alternative 1
- Village Residential (VR-20)
- Village Residential (VR-24)

General Plan Land Use
- GENERAL COMMERCIAL
- LIMITED IMPACT INDUSTRIAL
- MEDIUM IMPACT INDUSTRIAL
- NEIGHBORHOOD COMMERCIAL
- OFFICE PROFESSIONAL
- OPEN SPACE (CONSERVATION)
- OPEN SPACE (RECREATION)
- PUBLIC AGENCY LANDS
- PUBLIC/SEMI-PUBLIC FACILITIES
- SEMI-RURAL RESIDENTIAL (SR-1)
- SEMI-RURAL RESIDENTIAL (SR-4)
- SPECIFIC PLAN AREA
- VILLAGE CORE MIXED USE
- VILLAGE RESIDENTIAL (VR-2)
- VILLAGE RESIDENTIAL (VR-2.9)
- VILLAGE RESIDENTIAL (VR-4.3)
- VILLAGE RESIDENTIAL (VR-7.3)
- VILLAGE RESIDENTIAL (VR-10.9)
- VILLAGE RESIDENTIAL (VR-15)
- VILLAGE RESIDENTIAL (VR-20)
- VILLAGE RESIDENTIAL (VR-24)
- VILLAGE RESIDENTIAL (VR-30)

Map 31. Valle de Oro/Casa de Oro Land Use Alternative 2



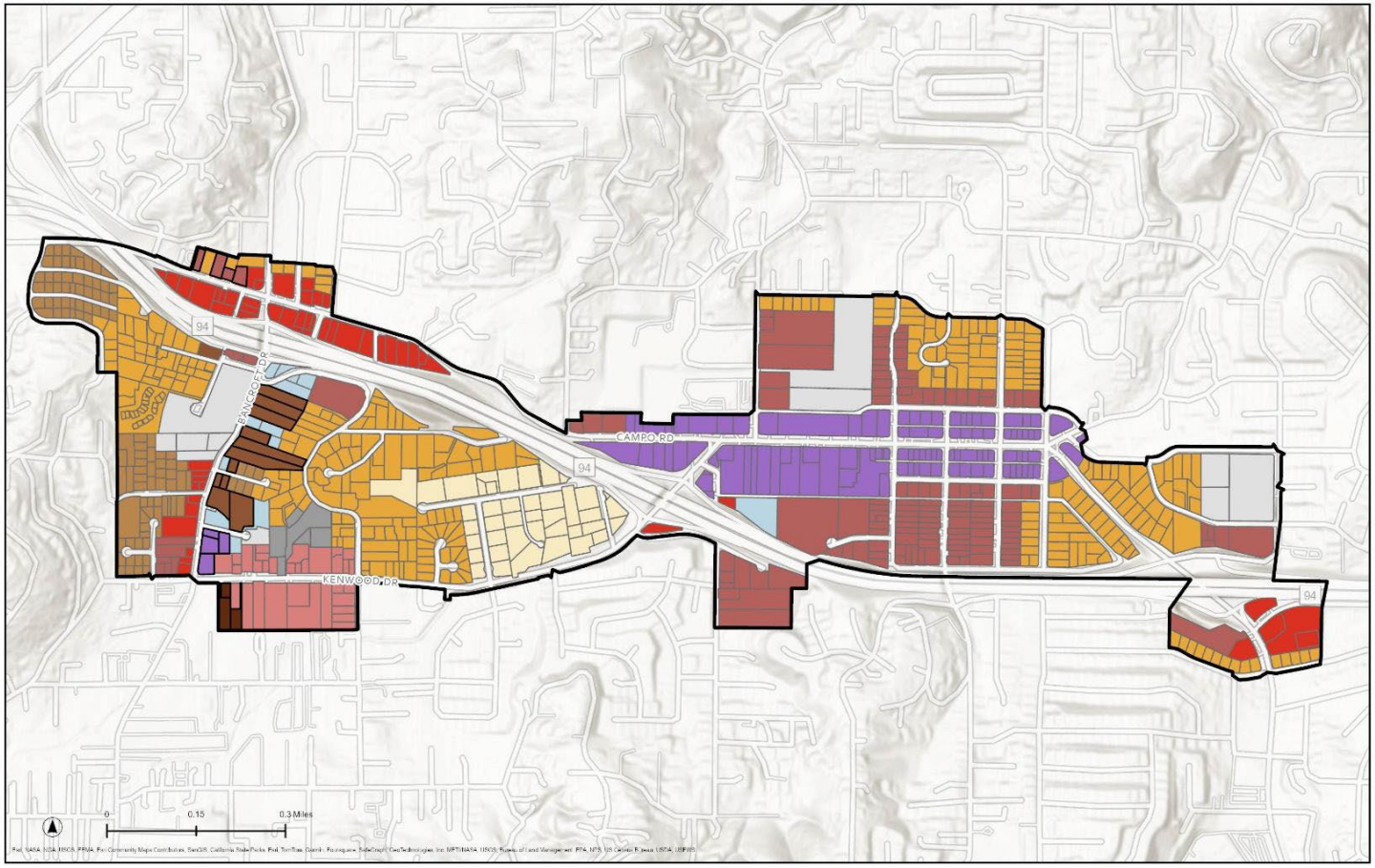
Data gathered from SanGIS in May 2024

Valle de Oro/Casa de Oro Alternative 2

Alternative 2
- Village Core Mixed Use
- Village Residential (VR-15)
- Village Residential (VR-24)
- Village Residential (VR-30)

General Plan Land Use
- GENERAL COMMERCIAL
- LIMITED IMPACT INDUSTRIAL
- MEDIUM IMPACT INDUSTRIAL
- NEIGHBORHOOD COMMERCIAL
- OFFICE PROFESSIONAL
- OPEN SPACE (CONSERVATION)
- OPEN SPACE (RECREATION)
- PUBLIC AGENCY LANDS
- PUBLIC/SEMI-PUBLIC FACILITIES
- SEMI-RURAL RESIDENTIAL (SR-1)
- SEMI-RURAL RESIDENTIAL (SR-4)
- SPECIFIC PLAN AREA
- VILLAGE CORE MIXED USE
- VILLAGE RESIDENTIAL (VR-2)
- VILLAGE RESIDENTIAL (VR-2.9)
- VILLAGE RESIDENTIAL (VR-4.3)
- VILLAGE RESIDENTIAL (VR-7.3)
- VILLAGE RESIDENTIAL (VR-10.9)
- VILLAGE RESIDENTIAL (VR-15)
- VILLAGE RESIDENTIAL (VR-20)
- VILLAGE RESIDENTIAL (VR-24)
- VILLAGE RESIDENTIAL (VR-30)

Map 32. Valle de Oro/Casa de Oro Land Use Alternative 3



Conclusion

The Valle de Oro/Casa de Oro DFA area faces constraints that limit development identified through a combination of market, financial, infrastructure, and land use analyses. The market assessment revealed that the median household income in Valle de Oro/Casa de Oro is lower than the countywide average. This reduces the purchasing power of local residents, potentially limiting the market demand for higher-end residential projects. Economic data showed that the unemployment rate in Valle de Oro/Casa de Oro is higher than the county average, which may contribute to reduced housing demand and a weaker local economy. The land use analysis found that much of the available land consists of small parcels. Many potential residential development projects would require land assembly to create sites large enough for efficient construction. The area lacks robust transit options beyond automobile-focused roadways. This limits the feasibility of transit-oriented development and reduces accessibility for residents without personal vehicles. Environmental concerns included identified slope (5% of DFA area) and floodplains (4% of DFA area) as major physical constraints to development. These challenges increase construction costs and require additional mitigation efforts.

Despite these constraints, the Valle de Oro/Casa de Oro DFA area presents multiple opportunities for growth. The revitalization of Campo Road is expected to enhance commercial and residential appeal, making the area a stronger candidate for new development. The market analysis found that La Mesa has been experiencing strong residential growth. Valle de Oro/Casa de Oro, located nearby, can benefit from this trend by offering additional housing options. The Campo Road corridor has been identified as a prime location for high-density housing, particularly mixed-use developments that integrate residential, commercial, and retail components. The housing market assessment suggests that single-family and small-lot developments would be well-suited for these areas, aligning with existing neighborhood character. Community feedback and demographic analysis indicate a need for diverse housing options, including affordable units. A mix of townhomes, garden-style apartments, and high-density residential units can help address this need. Recent developments in La Mesa demonstrate strong demand for multifamily housing. Valle de Oro/Casa de Oro can capitalize on this momentum by positioning itself as an attractive alternative for developers and renters.

To support these efforts, it is recommended to explore funding opportunities for the implementation of the Campo Road Corridor Revitalization Specific Plan, ensuring a strategic and well-resourced approach to development.

Lakeside

05. LAKESIDE

Map 33. Lakeside DFA area

Introduction

The Lakeside DFA area covers 2.44 square miles located in East County San Diego, as seen in Map 33. It is east of the City of Santee, north of the City of El Cajon, and is accessible via State Route 67 (SR 67) and Interstate 8 (I-8).

Community Demographics

Demographic Overview

The Lakeside DFA area is estimated to have a population of 14,557 (2023). The residential population is distributed with higher concentrations in the north and south portions near to the commercial areas, as shown in Map 34. The demographic information for Lakeside can be seen in Table 22.

Map 34. Lakeside Population Density

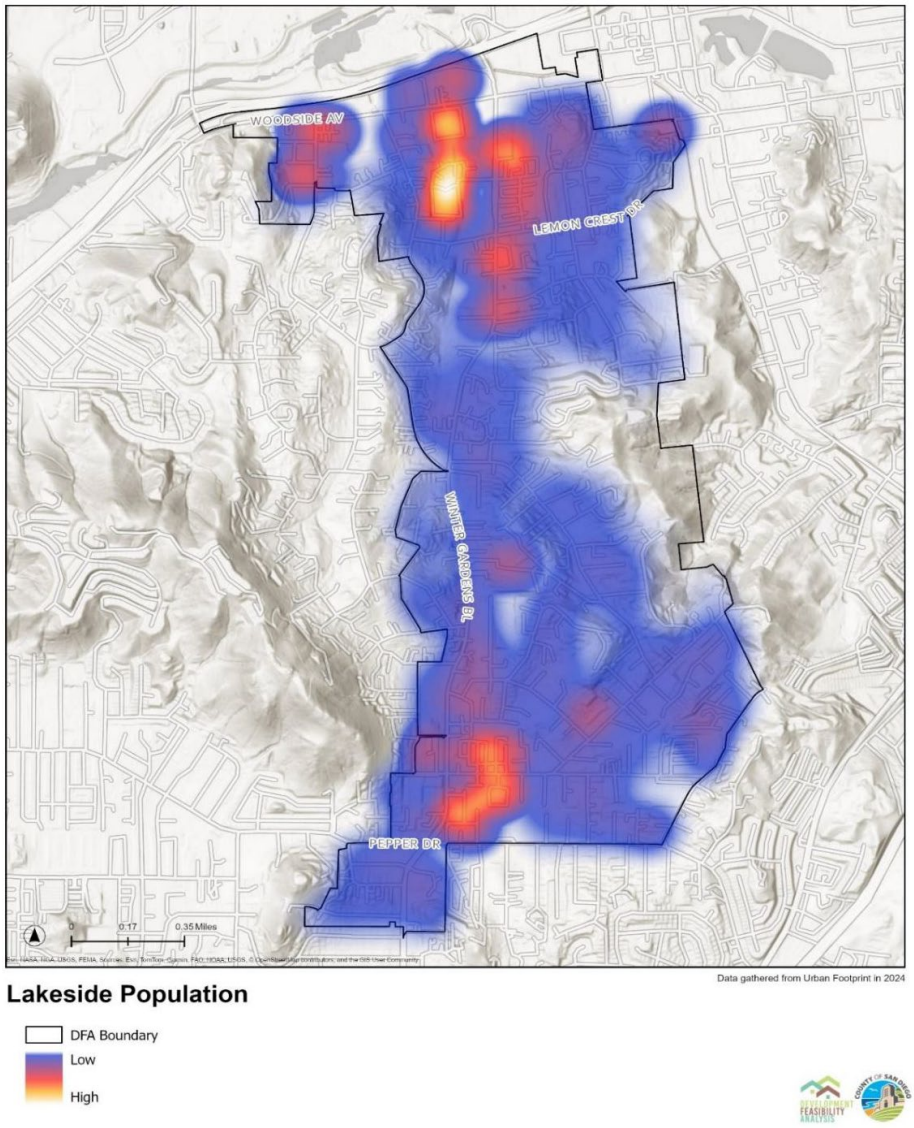


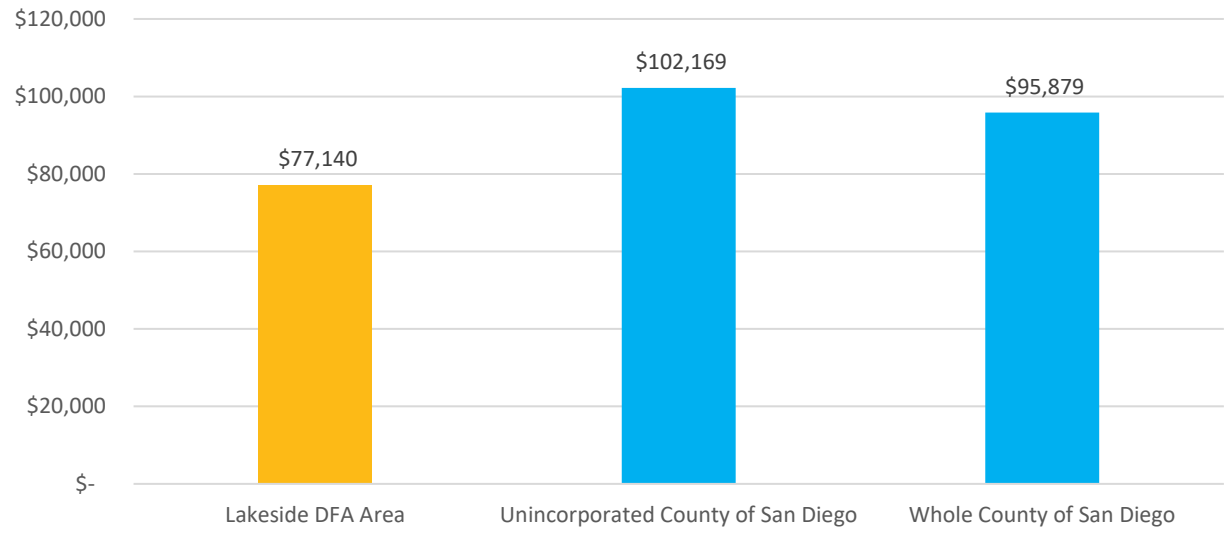
Table 22. Lakeside Demographic Overview with comparisons (2023)			
Demographics (2023)	Lakeside DFA area	Unincorporated County of San Diego	Entire County of San Diego
Population	14,557	519,735	3,325,714
Median Age	38.4	38.7 years	36.7 years
Unemployment Rate	3.7%	5.2%	4.9%
Households	5,261	167,962	1,172,259
Average Household Size	2.74	2.92	2.74
Owner-Occupied Housing Units	52.9%	65.6%	51.5%
Renter-Occupied Housing Units	43.8%	27.8	42.5%
Vacant Housing Units	3.2%	6.6%	6.1%

Source: Esri Business Analyst Online, May 2024.

Household Income Distribution

The median household income in Lakeside is $77,140 (2023), which is lower than the overall County of San Diego, estimated at $95,879 (2023), as seen in Figure 5.

Figure 5. Median Household Income, Lakeside comparisons (2023)



Compared to housing pricing, income levels in Lakeside do not support the recommended 28% of pre-tax income spent on mortgage. Lakeside homeowners spend 51.8% of their pre-tax income on mortgage payments on average.

Community Amenities

Community amenities represent the facilities, infrastructure, and spaces that contribute to residential quality of life. They include features like restaurants, grocery stores, schools, street trees, parks, and other elements of daily necessity. The presence of these amenities, or lack thereof, can influence the demand for residential development.

"LAKESIDE HAS BEAUTIFUL VIEWS OF NATURE AND MOUNTAINS, AND WE WANT TO KEEP THAT CHARACTER." — LAKESIDE RESIDENT

With respect to public transit, the Lakeside DFA area is served by several San Diego Metropolitan Transit System (MTS) bus stops, primarily along Winter Gardens Boulevard.

Additional neighborhood amenities were analyzed based on a three-mile trade ring from the center of the DFA area. The trade ring contains an ample number of schools/educational facilities and neighborhood parks/recreation, as well as several MTS bus stops along Winter Gardens Boulevard, Pepper Drive, and Main Street. The trade ring contains a medical center and a skilled nursing facility hospital; however, it is distant from larger hospitals such as the Sharp Grossmont Hospital. The trade ring contains many grocery stores and pharmacies; three of which are located within the DFA area. A full breakdown of amenities in Lakeside can be found in Table 23 with accompanying Maps 35 and 36.

"TO IMPROVE ACCESS, WE WANT TO IMPROVE THE SIDEWALKS, ESPECIALLY AROUND SCHOOLS AND LIBRARIES, FOR THE SAFETY OF CHILDREN." — LAKESIDE RESIDENT

Table 23. Lakeside Community Amenities — Trade Ring (3-miles to center of DFA area)

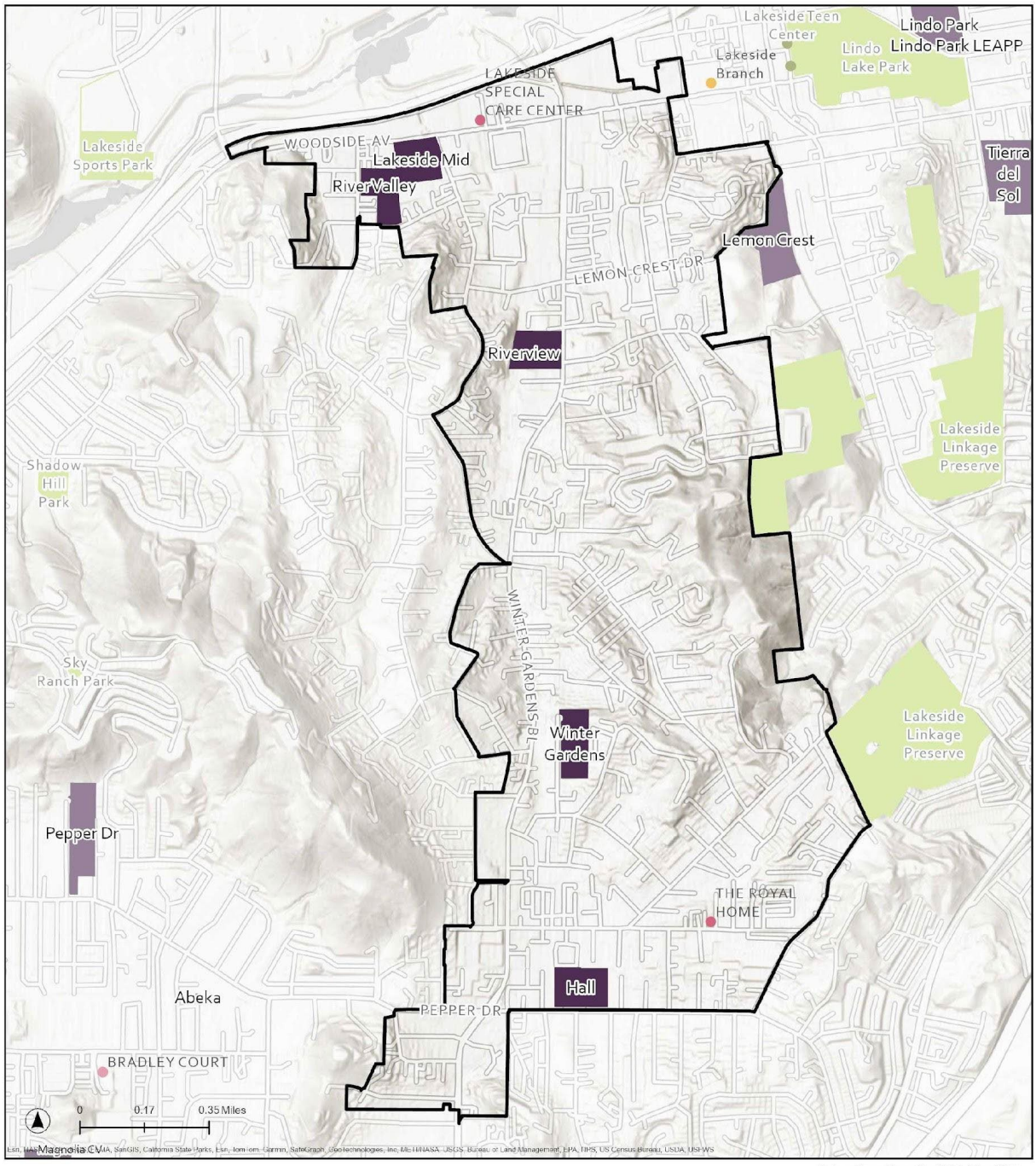
Amenity Category	Amenity
Public Transit	• MTS bus stops
Schools/Educational Facilities	• Marilla Lakeside Early Advantage Pre-school • Riverview Elementary • Winter Gardens Elementary • WD Hall Elementary • Magnolia Elementary • Lemon Crest Elementary • Lakeview Elementary • Lakeside Farms Elementary

Table 23. Lakeside Community Amenities — Trade Ring (3-miles to center of DFA area)

Amenity Category	Amenity
	• Pepper Drive Elementary • Lindo Park Elementary • Lakeside Middle School • Tierra Del Sol Middle School • Montgomery Middle School • River Valley High School • Granite Hills High School • Learn4Life Lakeside High School • El Capitan High School • Santana High School • EMSTA College • San Diego Christian College
Hospital/Medical Centers	• Edgemoor Hospital • Broadway Medical Clinic
Neighborhood Parks/Recreation	• Lakeside Linkage County Preserve • Sky Ranch Park • Rattlesnake Mountain Preserve • Shadow Hill Park • Lakeside Sports Park • Pocket Park • Lindo Lake County Park • Cactus County Park • Lakeside's River Park Conservatory • Magnolia Park • Bostonia Park • Albert Van Zanten Park • Lake Jennings Country Park • Lakeside Teen and Community Center • FUNbelievable Kids Play Center
Grocery Stores and Pharmacies	• Rite Aid • Albertsons • Grocery Outlet • Walgreens • Wintergarden's Market • Walmart Supercenter

Source: Keyser Marston Associates (KMA)

Map 35. Lakeside Community Amenities

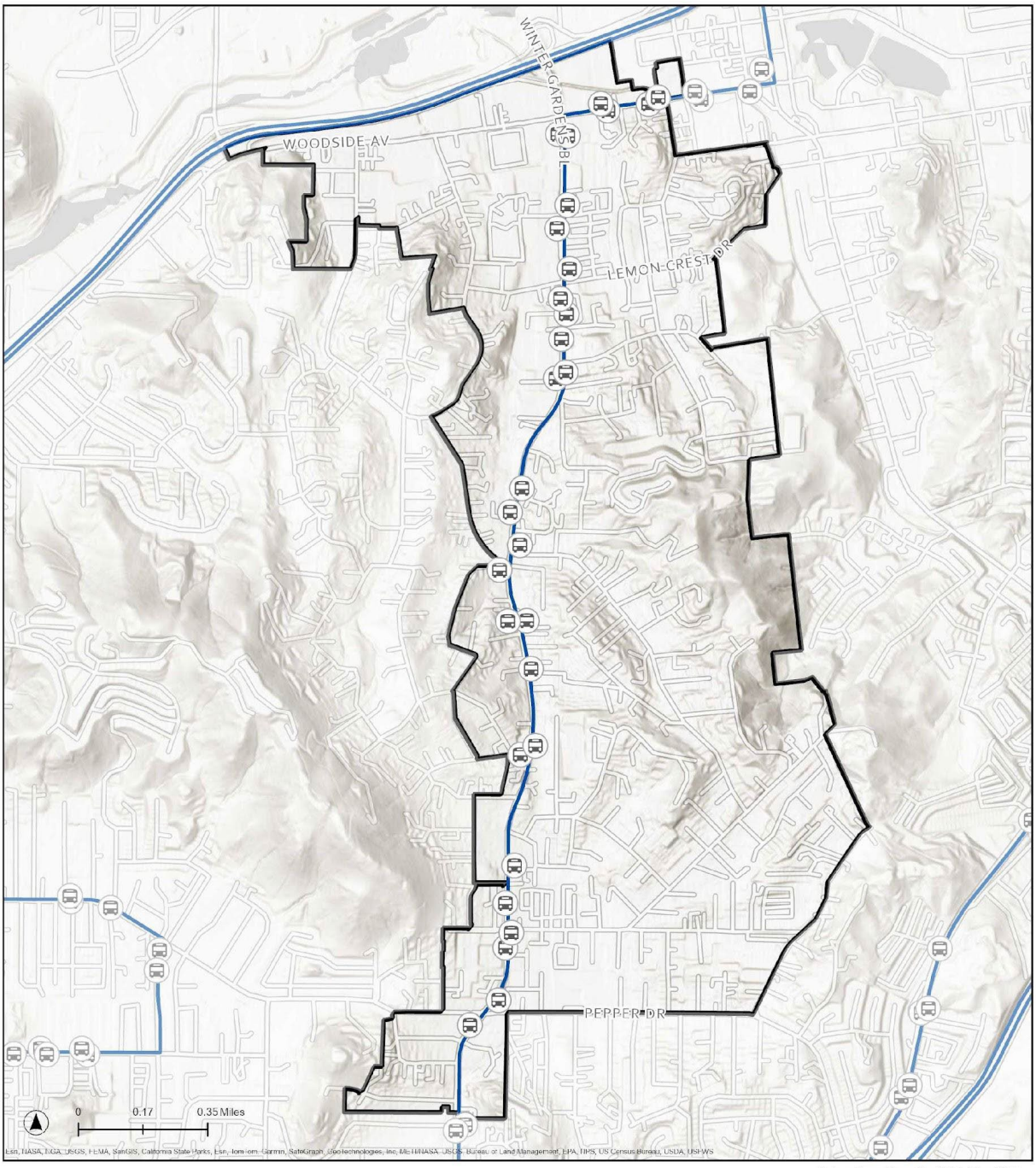


Data gathered from SanGIS in May 2024

Lakeside Community Amenities

- DFA Boundary
- Library
- Recreation Center
- Healthcare Facilities
- Parks
- Schools

Map 36. Lakeside Transit



Data gathered from SanGIS in May 2024

Lakeside Transit

DFA Boundary
Transit Stops
Transit Routes
Bus

Current Infrastructure

Lakeside Roadways

Lakeside is served by both public and private roads. Main roads such as Winter Gardens Boulevard act as major thoroughfares, but there are a significant portion of private roads leading to housing developments and private residences. Private roads can pose challenges to new development as there may be inconsistent maintenance, varying road conditions, and unknown fees. Therefore, it is recommended for new development to occur along County-maintained public roads. Alternatively, public road access could be provided via easements or other tools.

The Department of Public Works' (DPW) Infrastructure Gap Analysis Report (Exhibit B) identified a handful of recommendations for road corridor improvements. Recommendations are preliminary and require further analysis and assessment of constraints. The following is a summary of the recommended roadway and improvement investments in Lakeside from the Infrastructure Gap Analysis Report:

- **Woodside Avenue**, from Riverford Road to Chestnut Street: add sidewalks and Class II bike lanes, extend road width to 106 feet, and replace parallel parking with angled back-in parking.
- **Winter Gardens Boulevard**, from Woodside Avenue to Pepper Drive: extend right-of-way width to 106 feet and reduce vehicular lane to one lane on both sides; add back-in parking.

For more information on the changes identified, see Exhibit B. For the existing roadways, see Map 37 below.

Lakeside Water Service

Water services within the Lakeside DFA area are provided by the Lakeside Water District and Helix Water District. Water service consists of backbone transmission mains with distribution mains serving most areas of potential development. Some identified areas of potential development or land use change may require water service improvements outside of current public rights-of-way to serve specific parcels (laterals). See the Water and Sewer Infrastructure Analysis (Exhibit B) for more information and Map 38 for existing pipes.

Lakeside Sewer Service

Sewer services within the Lakeside DFA area are provided by the County of San Diego Sanitation District. Areas of development potential are either served by existing sewer mains or adjacent trunk mains. Some identified areas of potential development or land use change may require sewer service improvements outside of current public rights-of-way to serve specific parcels (laterals). Sewer capacity within the Winter Gardens area (southern portion of the study area) was noted as limited, at 89% utilization. See Exhibit B for more information and Map 39 for current existing pipes. The following are recommended sewer investments for Lakeside:

- The potential development area along Winter Gardens Boulevard, between Lemon Crest Drive and Woodside Avenue, may benefit from upsizing approximately 3,900 linear feet of existing 8"

VCP sewer with 12" PVC pipe. The primary consideration is the replacement of aging facility (VCP pipe) with a secondary consideration in pipe upsizing to meet long-term investment in future growth. Timing would match the anticipated market growth that could result in density increases, necessitating pipe upsizing. This recommendation would require additional detailed project-specific study by the County of San Diego Sanitation District. The construction costs are estimated at $3,300,000.

- "Winter Gardens Sewer Service Area – Sewer Master Plan," dated January 2013, prepared by Atkins, recommended the WG-1 CIP project; it is recommended that approximately 3,900 linear feet of existing 8" to 12" VCP sewer main be replaced with 15" PVC pipe. The sewer main along Winter Gardens Boulevard runs roughly between Dawnridge Road to Short Street. Timing would match the anticipated market growth that could result in density increases, necessitating pipe upsizing. This recommendation would require additional detailed project-specific study by the County of San Diego Sanitation District. The construction costs are estimated at $5,500,000.

Lakeside Stormwater Infrastructure

The Lakeside DFA area lies within County-managed Special Drainage Area 6 (SDA-6), the Lakeside SDA. Within SDA-6, targeted improvements are planned to address aging stormwater volume/flood control infrastructure as follows:

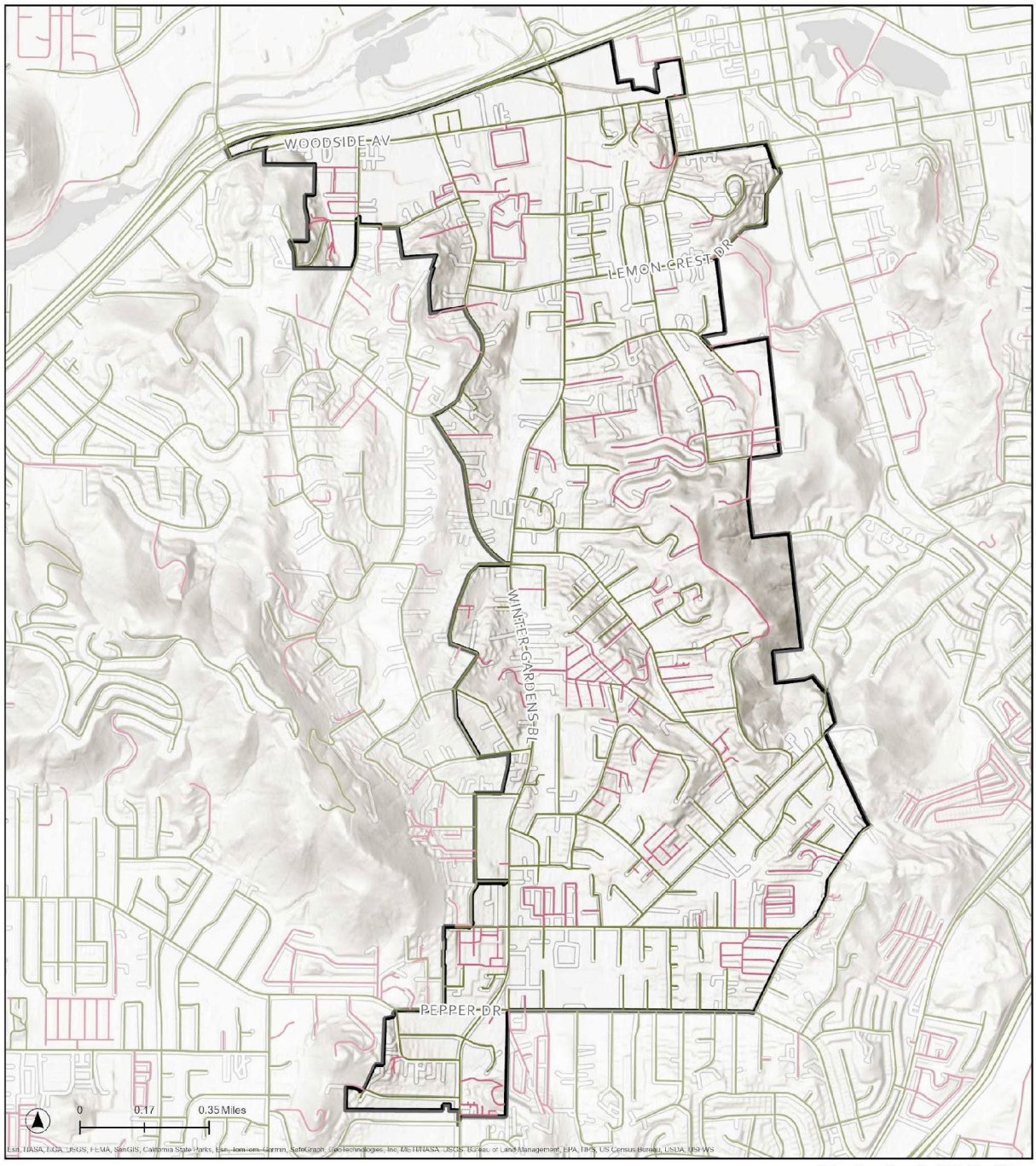
- 8301 Winter Gardens Blvd Storm Drain: Replace two 54-inch corrugated metal pipes.
- 8669 Winter Gardens Blvd Storm Drain: Repair 30-inch and 36-inch corrugated metal pipes.

In addition, the CIP identifies system modifications to improve stormwater quality, with the basin improvements described as having the parallel benefit of water retention to reduce flow volumes:

- Install underground trash/sediment capture devices and divert low flows to sanitary sewer
- Winter Gardens Regional BMP: Lakeside San Diego River design and construct 7-acre infiltration basin
- Woodside water-quality basin modifications

Individual development projects are required to comply with County requirements regarding retention of stormwater runoff onsite for both flood control and stormwater quality control purposes. Also, County Ordinance No. 7 (June 24, 1991) requires the payment of drainage fees as a condition for issuing any building permit.

Map 37. Lakeside Roads

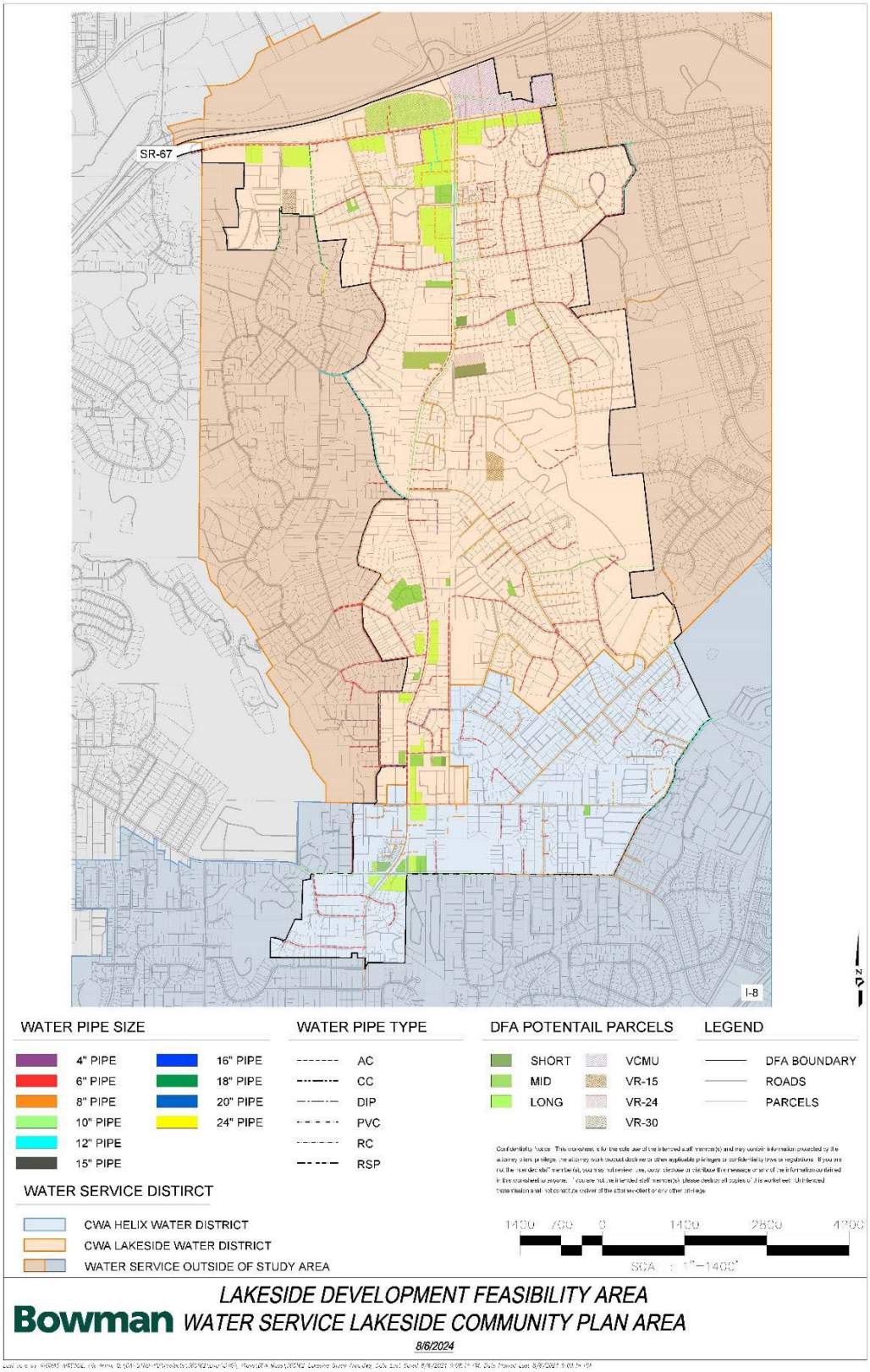


Data gathered from SanGIS in May 2024

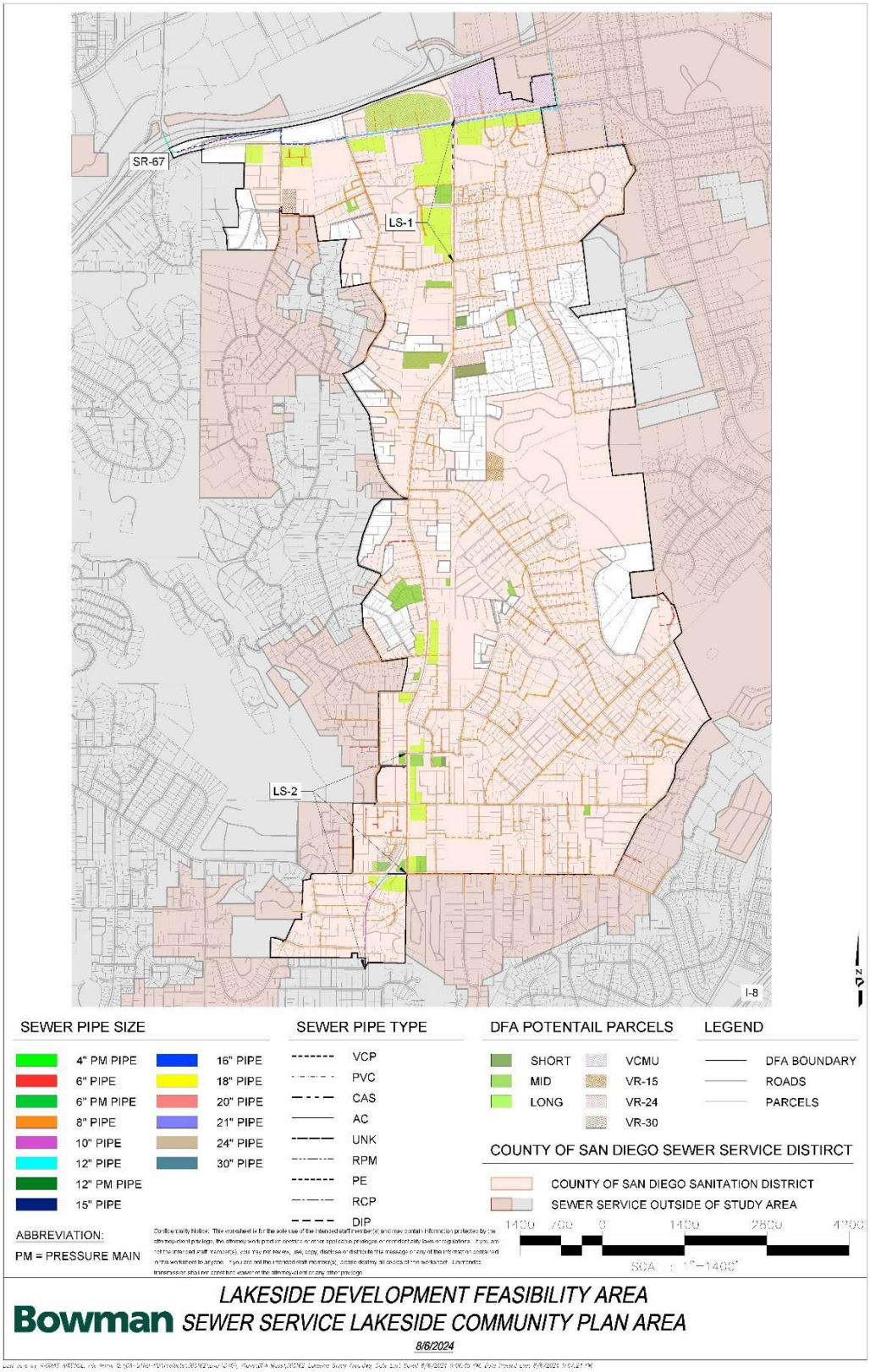
Lakeside Roads

- DFA Boundary
- Abandoned or No Longer in Use
- Dedicated
- Private street
- Undedicated

Map 38. Lakeside Water Service



Map 39. Lakeside Sewer Service



Housing Market Assessment

The following section provides a snapshot of opportunities, constraints, and the housing market analysis for Lakeside. Information for this section was sourced from the Market Feasibility Assessment created in June 2024 by Keyser Marston Associates (KMA). For more detailed information on residential market trends, see Exhibit C.

Existing Conditions

Lakeside can generally be characterized by a commercial corridor and multifamily residential along Woodside Avenue and Winter Gardens Boulevard, encompassed by single-family/mobile home residential.

Residential Market Trends and Projected Demand in Housing Units

Table 24 depicts the projected demand for housing and Table 25 depicts the potential residential development typologies for the Lakeside DFA area. Supportable market demand is evaluated in the near-term (0 to 5 years), mid-term (5 to 10 years), and long-term (10 or more years). In addition, the following metrics were used as part of this evaluation: “strong” meaning highly likely to occur, “moderate” meaning likely to occur, and “weak” meaning unlikely to occur.

Table 24. Lakeside Projected Housing Unit Demand (2025–2050)

Capture Level	Total Units	Units / Year
Low Capture	275 units	11 units / year
High Capture	549 units	22 units / year

Table 25. Lakeside Market Support for Residential Typologies

Capture Level	Units / Year	Near-Term (0–5 years)	Mid-Term (5–10 years)	Long-Term (10+ Years)
For-Sale Residential Development Typologies				
Medium Lot Single-Family	10 units / acre	Moderate	Strong	Strong
Townhomes	15–20 units / acre	Moderate	Moderate	Strong
Rental Residential Development Typologies				
Stacked Flat with Tuck-Under Parking	30+ units / acre	Weak	Weak	Moderate
Garden-Style Apartments	20-25 units / acre	Weak	Moderate	Moderate

Housing Development Financial Feasibility

Market-Rate Housing Development Financial Feasibility

This section provides a snapshot of housing prototypes and feasibility based on residential land values for Lakeside. Information for this section was sourced from a Lakeside Financial Feasibility Analysis created in June 2024 by Keyser Marston Associates (KMA). For more detailed information on housing development financing trends, see Exhibit D.

The financial feasibility analysis involved formulating development prototypes for five candidate sites and evaluating financial pro forma inputs and assumptions to measure the economic feasibility of each development prototype. Factors from the Market Feasibility Assessment (Exhibit C) were factors in the Financial Feasibility Analysis (Exhibit D). The financial analysis for each development prototype was evaluated to determine the supportable residential land value. Each residual land value model incorporated estimates of development costs, market rents/values, and target developer returns reflective of recent comparable projects and available market and industry data.

Development prototypes that make financial sense generate positive residual land values that indicate that a developer or investor could acquire the site, construct the development, sell or lease the completed development, and receive at least an industry standard target return on their investment. A description of each housing typology evaluated in Lakeside can be found in Table 26. As shown in Table 27, both medium-lot single-family and attached housing prototypes make financial sense, with the other housing prototypes showing a negative financial outcome.

Table 26. Lakeside Summary of Development Prototypes

Development Prototype	Illustrative Example	General Project Description
A Medium Lot Single-Family Detached Homes		• 2.37-acre site • 4.3 units/gross acre (Village Residential 4.3) • For-sale housing • 10 units • 1-2 stories • Attached garages • 2,620 SF average unit size
B Attached Townhomes		• 4.20-acre site • 20 units/gross acre (Village Residential 20) • For-sale housing • 84 units • 3 stories • Attached garages • 1,399 SF average unit size
C Stacked Flat w/Ground Floor Commercial and Surface/Tuck-Under Parking		• 0.93-acre site • 30 units/gross acre • Rental housing • 27 units • 500 SF commercial space • 3 stories • Surface and tuck-under parking • 845 SF average unit size
D Stacked Flat w/Ground Floor Commercial and Surface/Tuck-Under Parking (Non-Contiguous Site)		• 1.14-acre site • 30 units/gross acre • Rental housing • 34 units • 1,000 SF commercial space • 3 stories • Surface and tuck-under parking • 790 SF average unit size
E Stacked Flat w/Surface and Tuck-Under Parking		• 7.09-acre site • 40 units/gross acre (1) • Rental housing • 283 units • 4 stories • Surface and tuck-under parking • 866 SF average unit size
(1) Per the RiverWay Specific Plan (Plan) dated December 2015, the maximum density is 40 units per acre.		

Table 27. Lakeside Residual Land Values by Development Prototype

Product Type	A Medium Lot Single-Family Detached Homes	B Attached Townhomes	C Stacked Flat w/Ground Floor Commercial and Surface/ Tuck-Under Parking	D Stacked Flat w/Ground Floor Commercial and Surface/ Tuck-Under Parking (Non-Contiguous Site)	E Stacked Flat w/ Surface and Tuck-Under Parking
Tenure	For-Sale	For-Sale	Rental	Rental	Rental
Site Size (Gross)	2.37 Acres	4.20 Acres	0.93 Acres	1.14 Acres	7.09 Acres
Residual Land Value (2024 $)	$1,153,000 $115,000/Unit $11/SF Site (1)	$7,199,000 $86,000/Unit $39/SF Site (1)	($2,363,000) ($88,000)/Unit ($58)/SF Site (1)	($2,748,000) ($81,000)/Unit ($55)/SF Site (1)	($4,512,000) ($16,000)/Unit ($15)/SF Site (1)
Financial Feasibility Outcome	Strong Positive	Strong Positive	Negative	Negative	Negative

(1) Reflects residual land value per SF of gross site area.

Land Use Analysis

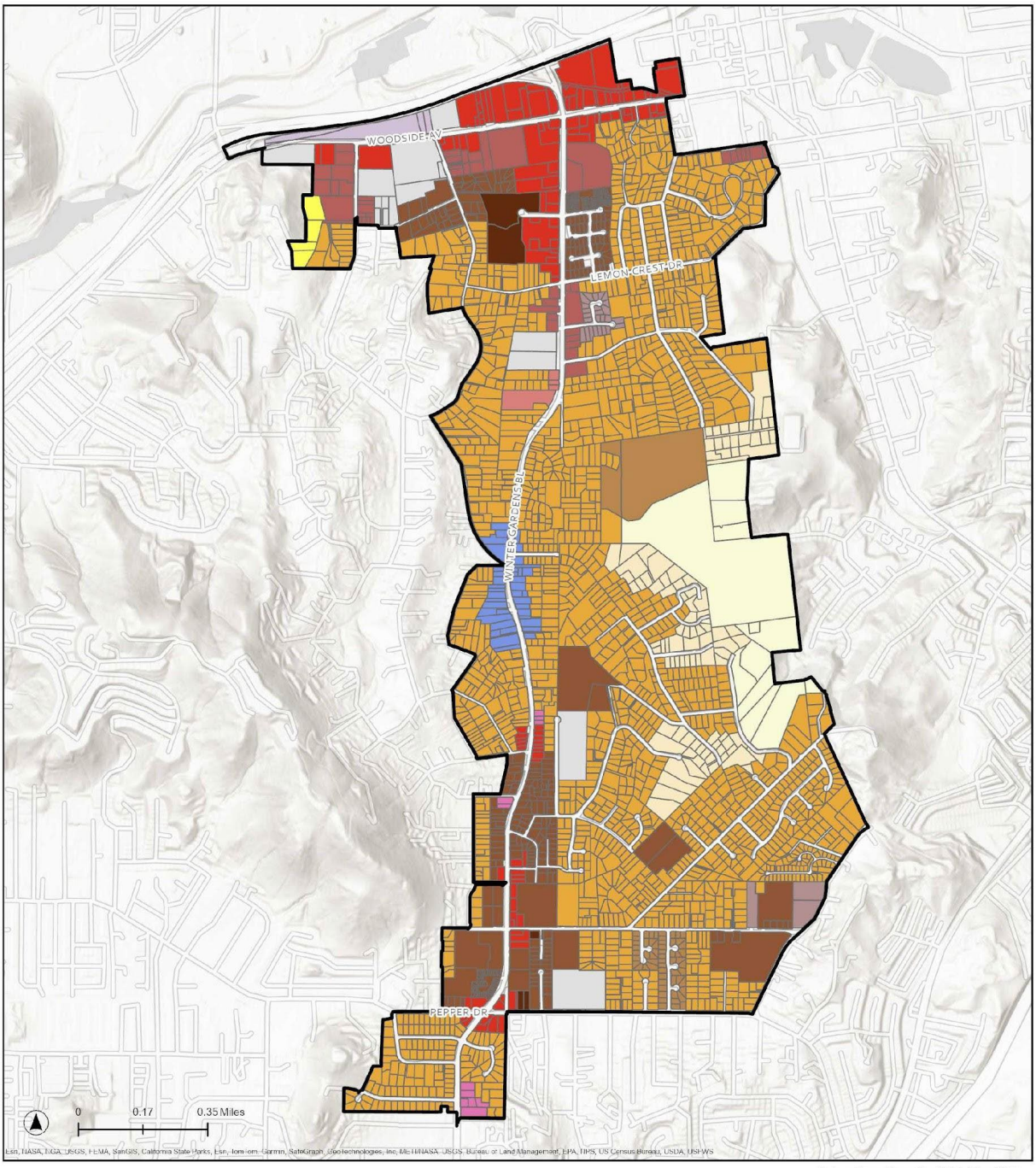
Current Land Use Policy

The Lakeside DFA area consists of 2,654 parcels, mostly developed with residential uses. The area has very limited commercial, professional, and industrial land uses. As with the other DFA areas, not all current actual uses align with land use designations, and in some cases, residential uses are developed on commercial lands or commercial properties are located on industrial lands, etc. Table 28 shows a breakdown of the land use designations found in Lakeside and Map 40 demonstrates the distribution of the designations geographically. Relatively few parcels have low Building-to-Land-Value (BLV) in Lakeside. BLV compares the assessed improvement value to the assessed land value. Land values higher than improvement values are generally seen as "underutilized lands," which are more likely to redevelop. As of 2024, 24% of Lakeside parcels are considered underutilized (BLV <1) as seen in Map 41.

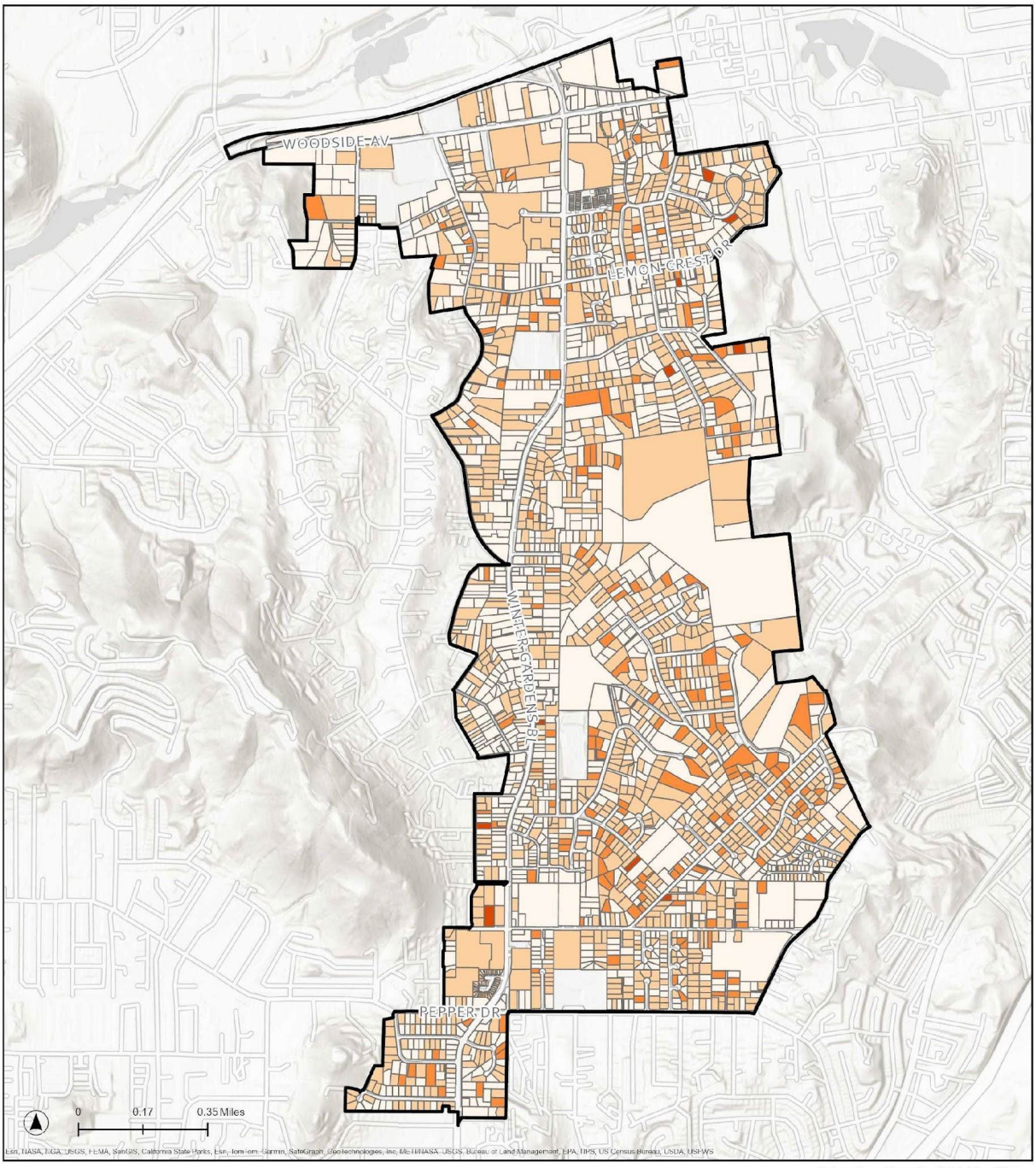
Table 28. Lakeside Current Land Use Designations

Land Use Designation	Lakeside Parcel Count	Percentage of Total
GENERAL COMMERCIAL	115	4.3%
NEIGHBORHOOD COMMERCIAL	-	0.0%
OFFICE PROFESSIONAL	11	0.4%
LIMITED IMPACT INDUSTRIAL	-	0.0%
MEDIUM IMPACT INDUSTRIAL	39	1.5%
OPEN SPACE (CONSERVATION)	2	0.1%
OPEN SPACE (RECREATION)	-	0.0%
PUBLIC AGENCY LANDS	-	0.0%
PUBLIC/SEMI-PUBLIC FACILITIES	15	0.6%
SEMI-RURAL RESIDENTIAL (SR-1)	9	0.3%
SEMI-RURAL RESIDENTIAL (SR-4)	14	0.5%
VILLAGE RESIDENTIAL (VR-2)	106	4.0%
VILLAGE RESIDENTIAL (VR-2.9)	-	0.0%
VILLAGE RESIDENTIAL (VR-4.3)	1,833	69.1%
VILLAGE RESIDENTIAL (VR-7.3)	61	2.3%
VILLAGE RESIDENTIAL (VR-10.9)	28	1.1%
VILLAGE RESIDENTIAL (VR-15)	356	13.4%
VILLAGE RESIDENTIAL (VR-20)	4	0.2%
VILLAGE RESIDENTIAL (VR-24)	51	1.9%
VILLAGE RESIDENTIAL (VR-30)	5	0.2%
VILLAGE CORE MIXED USE (VC-30)	-	0.0%
SPECIFIC PLAN AREA	5	0.2%
TOTAL	2,654	100%

Map 40. Lakeside Land Use Designations (General Plan)



Map 41. Lakeside Building-to-Land-Value (BLV)



Data gathered from SanGIS in May 2024

Lakeside BLV

DFA Boundary

- 0 - 1
- 2 - 3
- 4 - 10
- 11 - 42
- 43 - 110

Building to Land Value is calculated by dividing the assessed improvement value by the assessed land value. Information was gathered from SanGIS Zoning information. Parcels that are empty did not have assessed value available.

Housing Development

The housing density within Lakeside is lower than what is permitted under current General Plan land use. As of 2024, there are 5,031 DU within the Lakeside DFA area.[1] Map 42 displays the actual DUs in Lakeside. An objective of this study is to uncover ways to increase that number, while still providing high quality of life to current and future residents and addressing environmental constraints of the area.

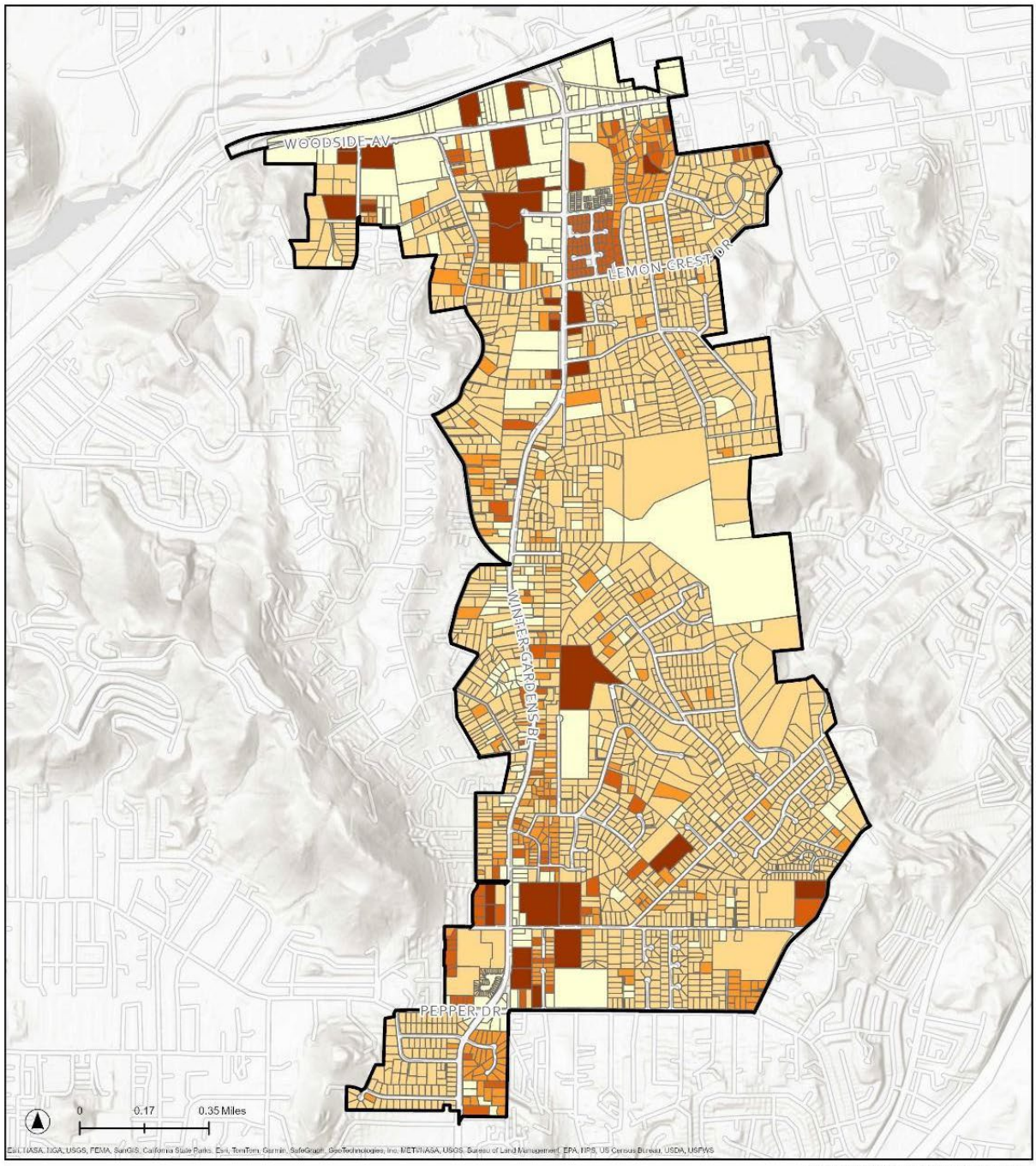
Environmental Constraints

Environmental conditions can have adverse effects on the housing market with impacts to housing density or form, structural or infrastructural costs, additional studies for land preparation, time delays, capacity considerations, safety risk, insurance, loans, and more. This study evaluated earthquake fault zones, airport hazard zones, airport noise, floodplains, wetlands, forest conservation, habitat preserve, environmentally sensitive areas, pre-approved mitigation zones, publicly owned lands, and slope as constraining factors to housing development. Fire risk was not included as a constraining factor. While it is acknowledged that the County faces increasing fire risk, the mitigation efforts around fire risk for housing development demote this factor as an environmental constraint for analysis purposes.

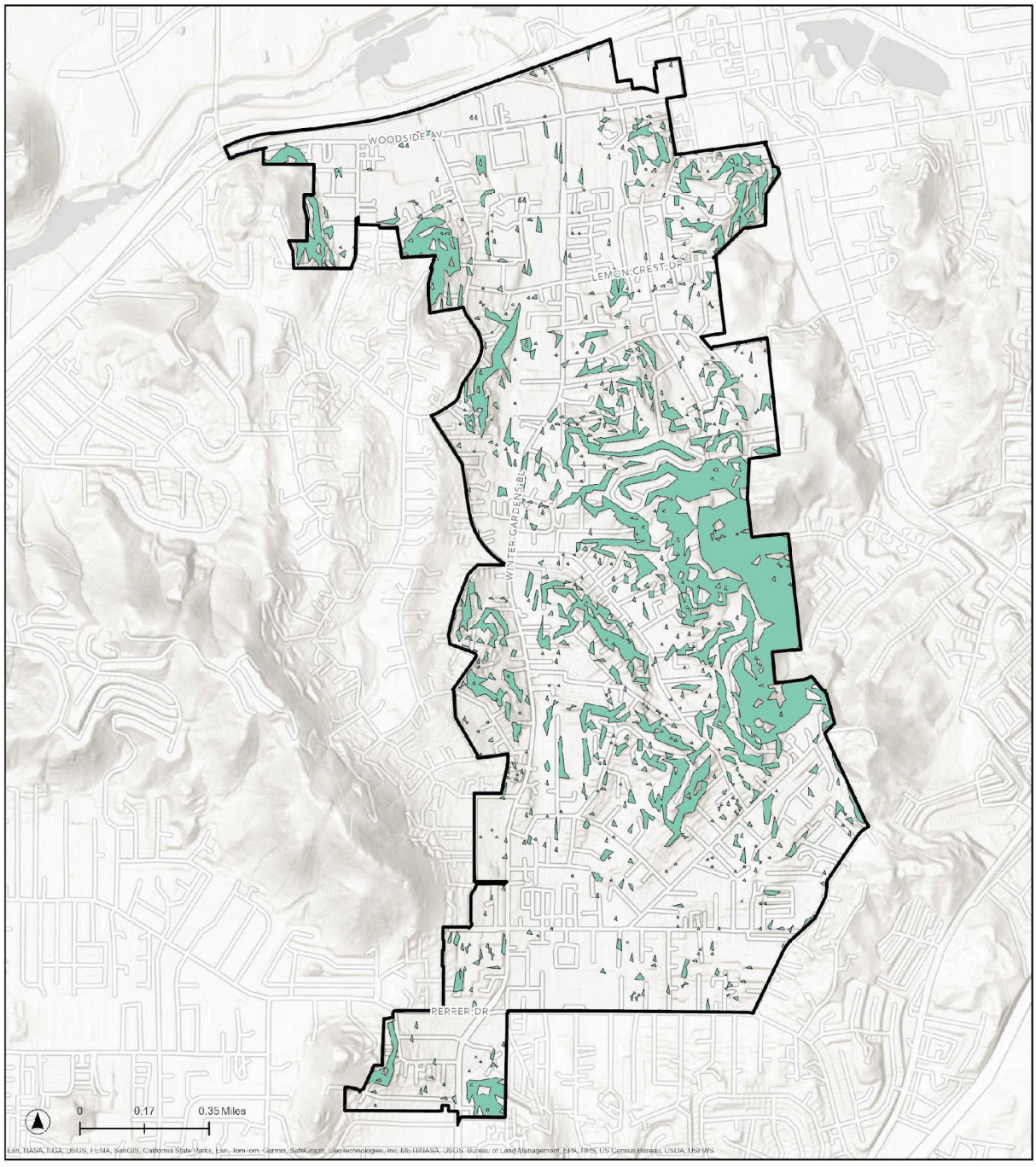
The main environmental constraints to housing development in Lakeside are pre-approved mitigation area (PAMA) habitat-sensitivity areas and slope, covering 22% and 12%, respectively. These constraints can be seen in Maps 43 and 44. While habitat sensitivity poses a strict challenge to development, slope can be mitigated to a reasonable degree for a cost. While risk and cost tolerance will vary depending on the developer, the buyer, and the market, it is the intention of this study to consider the most feasible options, i.e., the parcels that pose the lowest risk and have the highest potential for development.

[1] Current dwelling unit data sourced from UrbanFootprint.

Map 42. Lakeside Actual Existing DUs



Map 43. Lakeside Topographic Slope

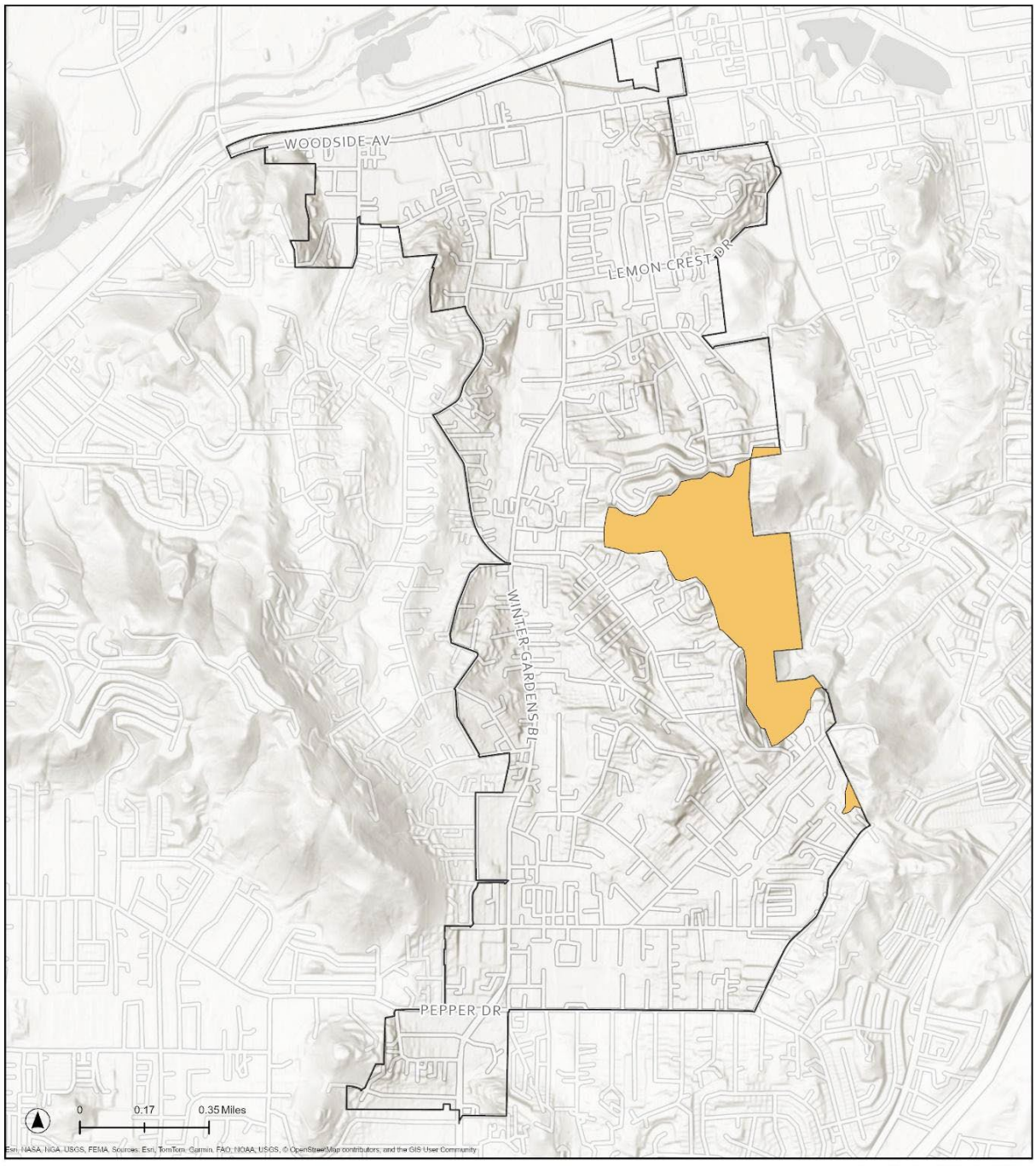


Data gathered from SanGIS in May 2024

Lakeside Slope

Areas of slope greater than 25%

Map 44. Lakeside Pre-Approved Mitigation Areas (PAMA)



Data gathered from SanGIS in May 2024

Lakeside Pre-Approved Mitigation

Pre-Approved Mitigation

Land Use Alternatives

To explore the impact of land use designations on housing development, three alternative scenarios of land use were prepared for each DFA area. This analysis is largely independent of the market analysis. The land use analysis revealed that current General Plan land use designations are not being fully utilized, meaning that increasing capacity alone would not necessarily lead to more housing development. Instead, it could artificially drive up costs. To ensure a balanced approach, any proposed land use amendments must be evaluated holistically. The findings from this analysis will be shared with the County's Framework project to inform their review of land use designations. However, before any changes to land use are made, the key barriers identified in this report (Chapter 7) must first be addressed.

Under each alternative scenario, a modification of allowable dwelling units (DU) is unlocked. Table 29 summarizes actual existing DUs that are already built out (2024 Actual), expected unit yield under current zoning with no changes (Alternative 0), and expected unit yield under three alternatives that vary in intensity of modifications (Alternatives 1, 2, and 3). The land use alternative options see a shift in allowable DU. DU yields factor in land use designations, density allowances, unconstrained land acreage, yield factors, vacancy, and redevelopment potential. More information on methodology, parcel selection, and designation changes can be seen in Exhibit E.

Table 30 demonstrates the changes under each scenario by land use. Maps 45, 46, 47, and 48 reflect the alternative scenarios geographically.

Table 29. Lakeside Dwelling Units per Alternative Scenario Summary

Dwelling Unit Yields	2024 Actual	Alternative 0	Alternative 1	Alternative 2	Alternative 3
Actual Existing Dwelling Units (2024)	5,031				
DU Yield on All Unconstrained Land		5,305	5,354	5,410	5,653
DU Yield on Unconstrained Vacant Land Only		175	198	235	235
DU Yield on Unconstrained Underutilized Land only (non-vacant)[1]		1,121	1,121	1,123	1,201

1. Underutilized land refers to parcels that have a Building-to-Land Value (BLV) of less than 1. A low BLV indicates that the value of improvements is less than the value of the land, and therefore, offers a strong financial incentive to redevelop for better property value.

Table 30. Lakeside Dwelling Units on All Unconstrained Land

Residential Land Use Designation	DU Density	Yield Factor[1]	Actual Existing DU[2]	DU Yield Alt 0	DU Yield Alt 1	DU Yield Alt 2	DU Yield Alt 3
GENERAL COMMERCIAL	n/a	-	302	-	-	-	-
LIMITED IMPACT INDUSTRIAL	n/a	-	-	-	-	-	-
MEDIUM IMPACT INDUSTRIAL	n/a	-	22	-	-	-	-
NEIGHBORHOOD COMMERCIAL	n/a	-	-	-	-	-	-
OFFICE PROFESSIONAL	n/a	-	12	-	-	-	-
OPEN SPACE (CONSERVATION)	n/a	-	-	-	-	-	-
OPEN SPACE (RECREATION)	n/a	-	-	-	-	-	-
PUBLIC AGENCY LANDS	n/a	-	-	-	-	-	-
PUBLIC/SEMI-PUBLIC FACILITIES	n/a	-	-	-	-	-	-
SPECIFIC PLAN AREA	40 DU / acre	70%	-	56	56	56	56
SEMI-RURAL RESIDENTIAL (SR-1)	1 DU / acre	70%	4	2	2	2	2
SEMI-RURAL RESIDENTIAL (SR-4)	1 DU / 4 acres	70%	9	0	0	0	0
VILLAGE RESIDENTIAL (VR-2)	2 DU / acre	70%	97	68	68	68	68
VILLAGE RESIDENTIAL (VR-2.9)	2.9 DU / acre	70%	-	-	-	-	-
VILLAGE RESIDENTIAL (VR-4.3)	4.3 DU / acre	70%	2,141	2,047	2,033	2,033	2,033
VILLAGE RESIDENTIAL (VR-7.3)	7.3 DU / acre	70%	60	171	171	171	171
VILLAGE RESIDENTIAL (VR-10.9)	10.9 DU / acre	70%	54	96	98	96	96
VILLAGE RESIDENTIAL (VR-15)	15 DU / acre	62%	1,109	1,344	1,344	1,346	1,346

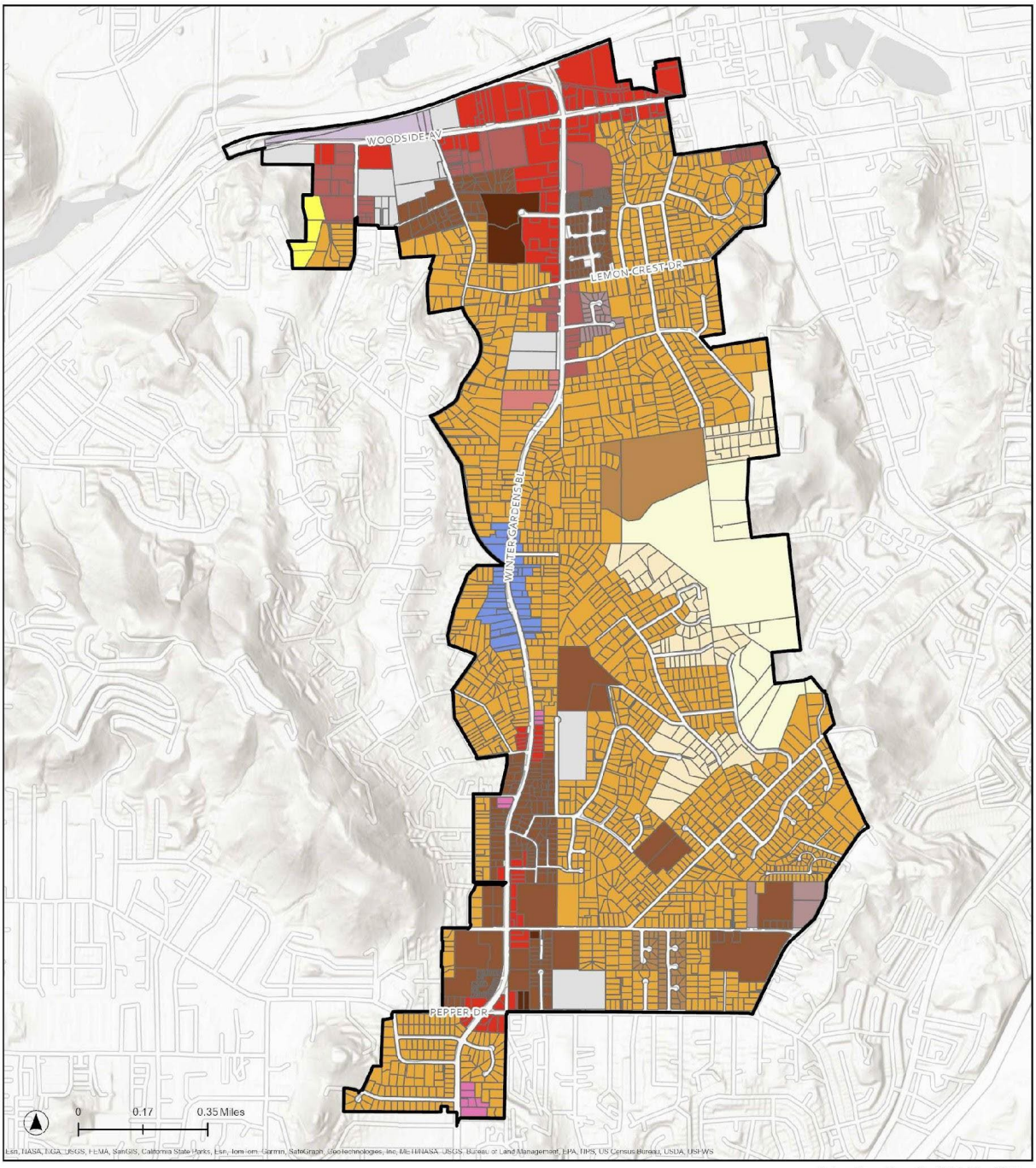
Table 30. Lakeside Dwelling Units on All Unconstrained Land

Residential Land Use Designation	DU Density	Yield Factor[1]	Actual Existing DU[2]	DU Yield Alt 0	DU Yield Alt 1	DU Yield Alt 2	DU Yield Alt 3
VILLAGE RESIDENTIAL (VR-20)	20 DU / acre	73%	32	66	128	14	14
VILLAGE RESIDENTIAL (VR-24)	24 DU / acre	89%	830	1,108	1,108	1,225	1,225
VILLAGE RESIDENTIAL (VR-30)	30 DU / acre	76%	359	347	347	399	399
VILLAGE CORE MIXED USE	30 DU / acres	32%	-	-	-	-	242
TOTAL			5,031	5,305	5,354	5,410	5,653

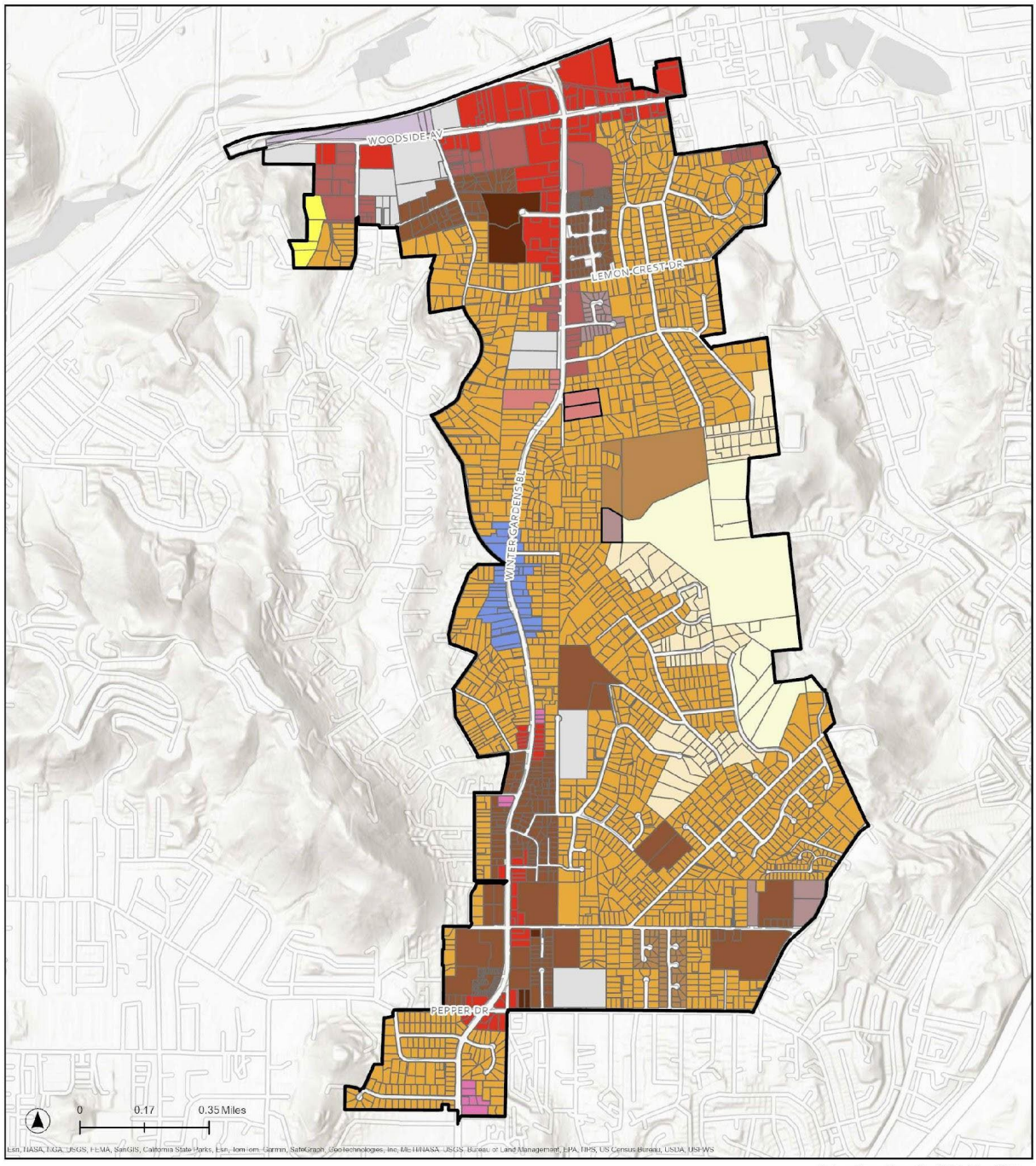
1. DU calculations include yield factors, which is a percentage based on actual yield expectations. See Data Notes for more info.

2. Source: UrbanFootprint (accessed 2024).

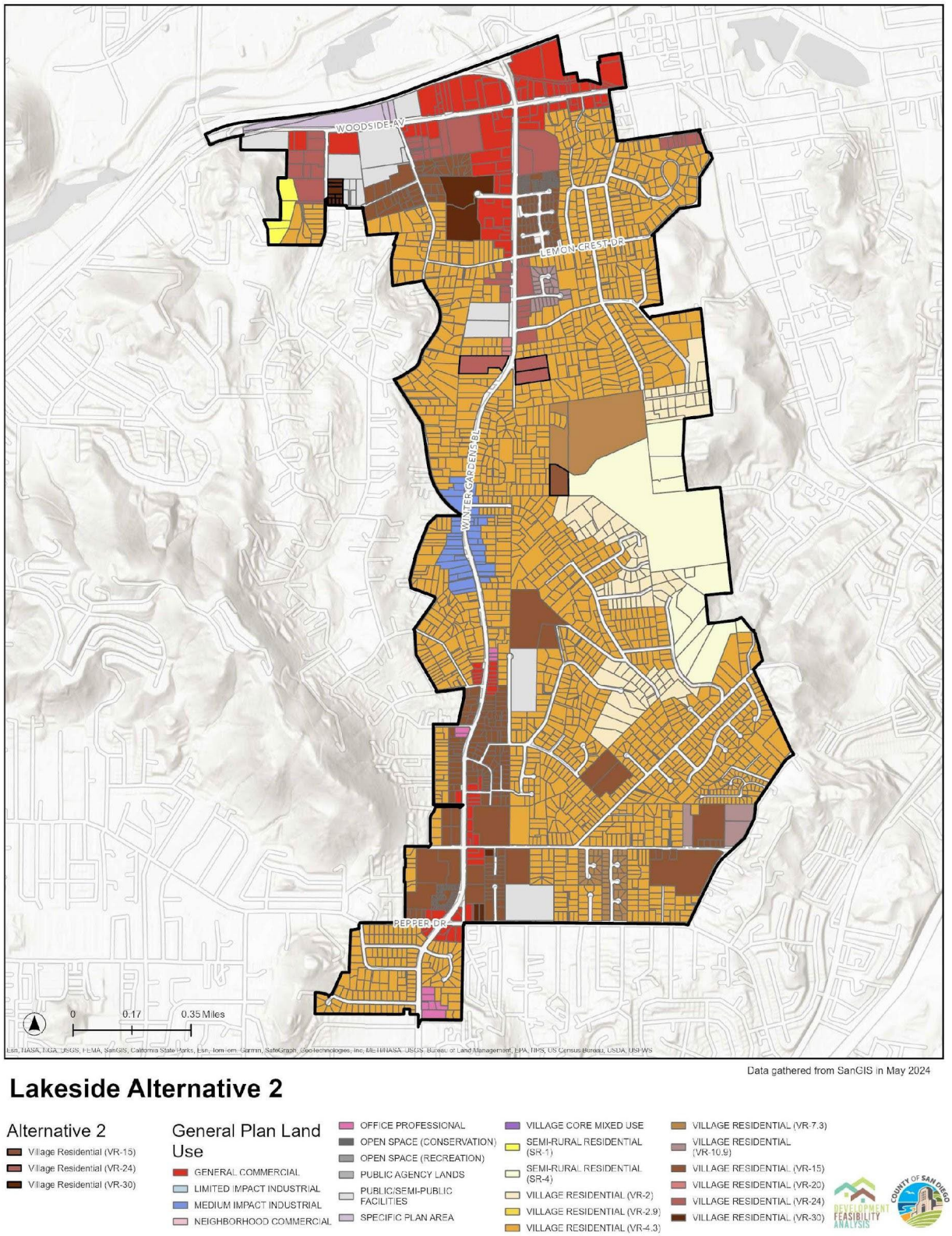
Map 45. Lakeside Current Land Use Policy (Alternative 0)



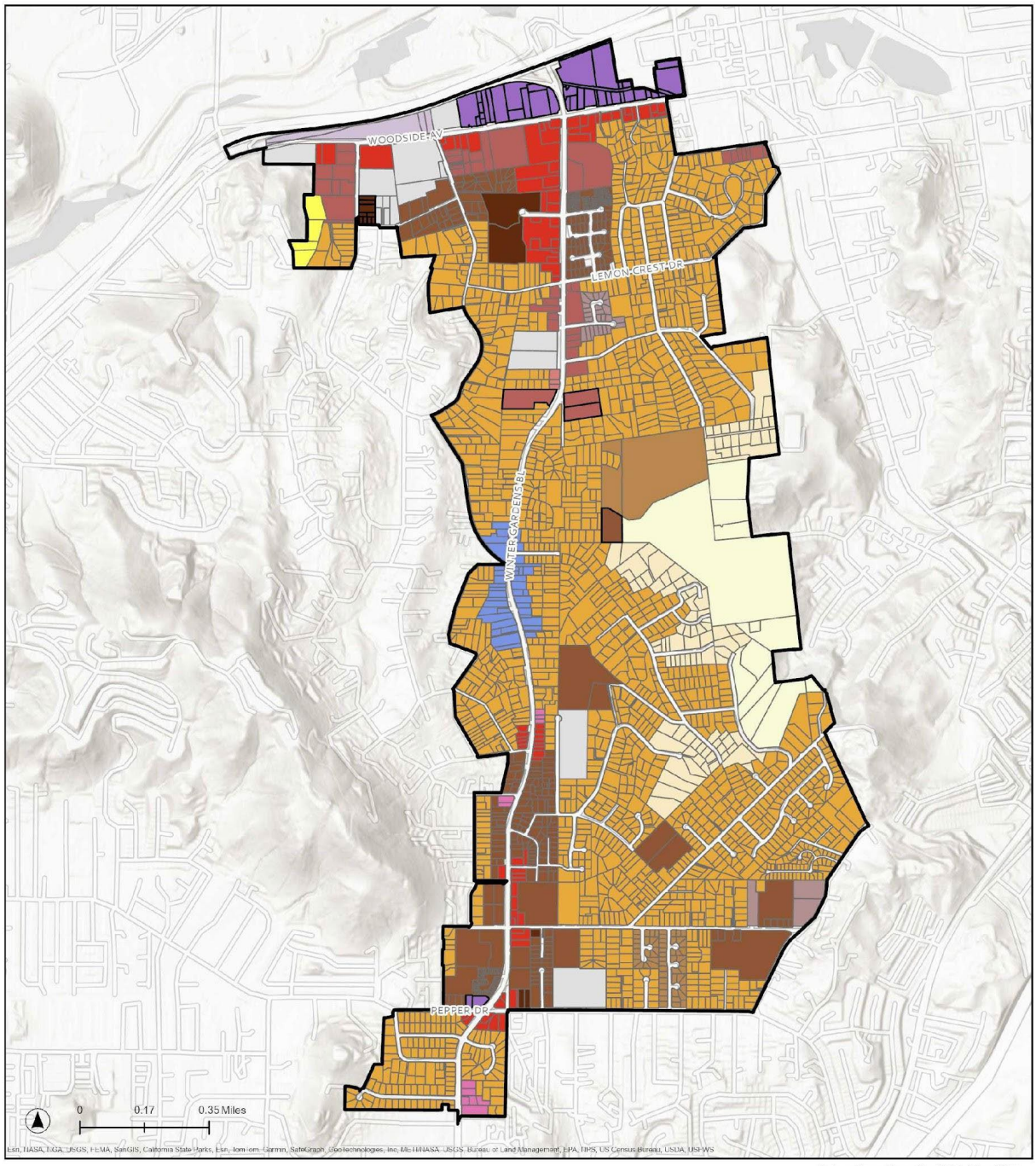
Map 46. Lakeside Land Use Alternative 1



Map 47. Lakeside Land Use Alternative 2



Map 48. Lakeside Land Use Alternative 3



Conclusion

The Lakeside DFA area faces constraints that limit development identified through a combination of market, financial, infrastructure, and land use analyses. The market analysis found that there are currently no major residential projects in planning or development within the DFA area. The absence of development momentum makes it difficult to attract investment. The financial feasibility analysis identified that residential land values in Lakeside are lower than those in surrounding areas. This makes it less attractive for developers, as land sales do not generate enough value to justify new construction. The market analysis highlighted that Lakeside has a lower median household income than the broader region. This limits the ability of residents to afford market-rate housing, reducing demand for higher-end residential projects. Environmental constraints, particularly slope, affect approximately 12% of the land in the Lakeside DFA area. These lands require costly engineering solutions to make development feasible, increasing overall project costs. Infrastructure assessments revealed that some parts of Lakeside lack adequate sewer and water capacity. In particular, sewer capacity in the Winter Gardens area is near its limit, at 89% utilization, which restricts new development unless upgrades are made. Stormwater infrastructure improvements are needed, including the replacement of aging drainage systems to prevent flooding in key residential areas.

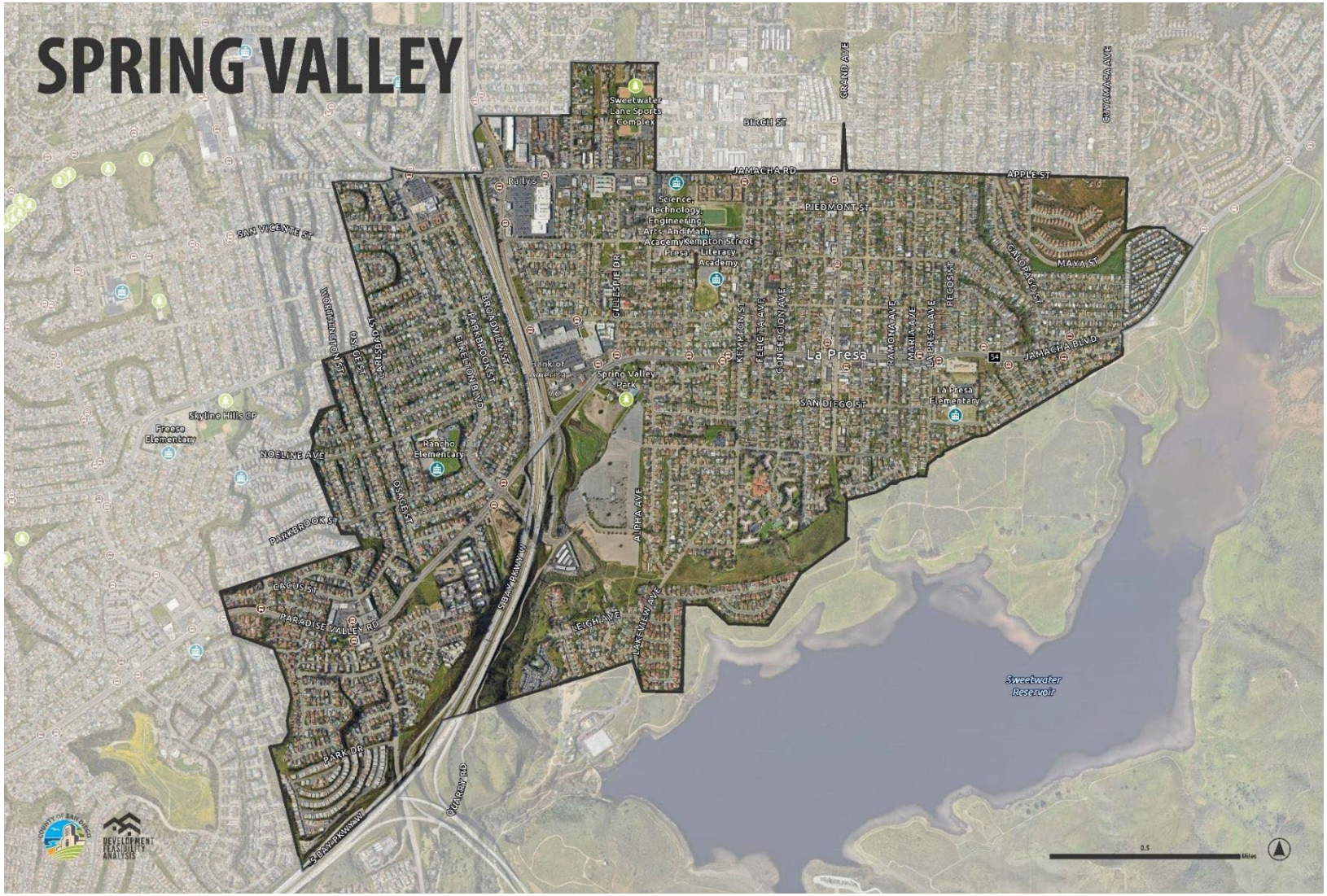
Despite these challenges, the report outlines several opportunities for residential development in Lakeside. The City of Santee has experienced significant residential growth in recent years, and Lakeside is well-positioned to capitalize on this demand by offering more affordable housing options. The market study suggests that there is demand for medium-lot single-family homes and townhomes in existing residential zones, particularly along Winter Gardens Boulevard. The land use analysis identifies these areas as prime locations for multifamily housing due to their proximity to commercial amenities and transit routes.

To address these constraints and leverage opportunities, it is recommended to pursue grant funding for the development of a Specific Plan that prioritizes mixed-use housing, streetscape enhancements, and pedestrian safety, along with provisions for signage, landscaping, and improved access to open spaces. Additionally, exploring the designation of the area as an Old West cultural zone can help preserve and celebrate its heritage. Further, the feasibility of establishing Business Improvement Districts (BIDs) or utilizing Community Development Block Grants (CDBGs) should be investigated to support the successful implementation of the Specific Plan.

Spring Valley

06. SPRING VALLEY

Map 49. Spring Valley DFA area



Introduction

The Spring Valley DFA area covers 2.54 square miles in East San Diego County, just east of the City of Lemon Grove. As seen in Map 49, the area is bifurcated by State Route 125 (SR 125).

Community Demographics

Demographic Overview

The Spring Valley DFA area has an estimated population of 18,920 (2023). As seen in Table 31, the population is generally of working age, with most residents between 15 and 64 years old (working demographic). The population is fairly distributed around the area, except for notable gap areas occupied by the Spring Valley Swap Meet, big box retailers and shopping centers, church sites, and open land surrounding the Sweetwater Reservoir, as shown in Map 50.

Map 50. Spring Valley Population Density

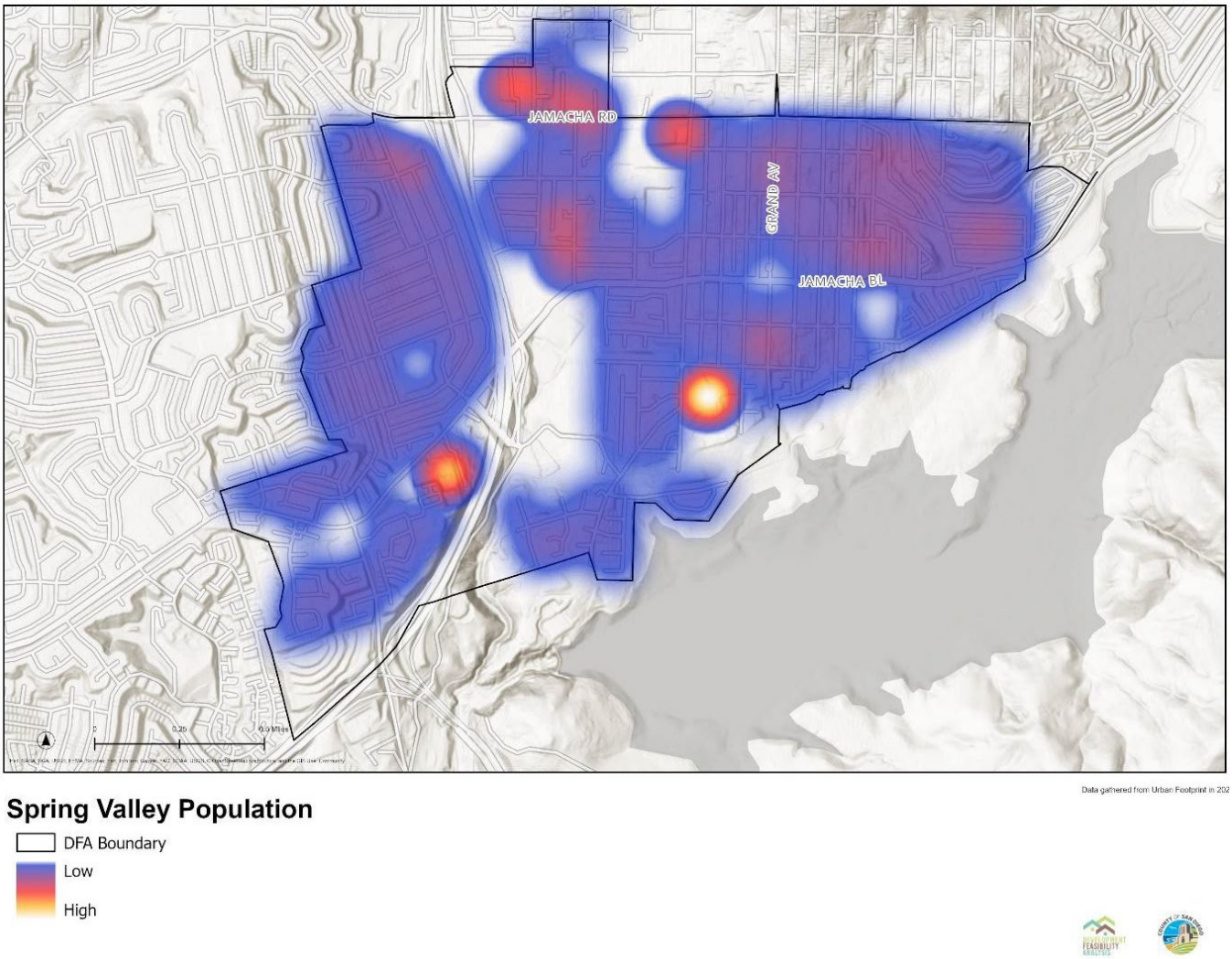


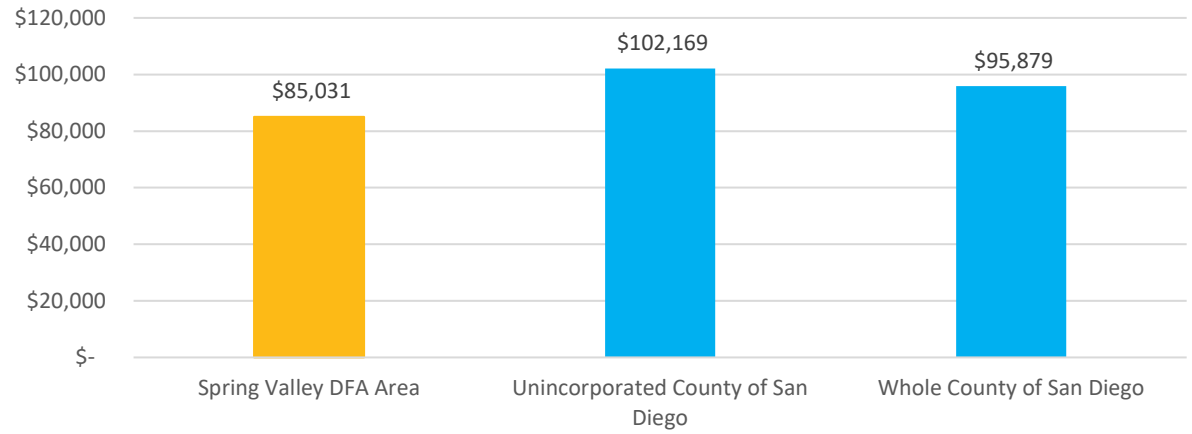
Table 31. Spring Valley Demographic Overview with comparisons (2023)			
Demographics	Spring Valley DFA area	Unincorporated County of San Diego	Entire County of San Diego
Population	18,920	519,735	3,325,714
Median Age	34.6 years	38.7 years	36.7 years
Unemployment Rate	8.7%	5.2%	4.9%
Households	5,433	167,962	1,172,259
Average Household Size	3.45	2.92	2.74
Owner-Occupied Housing Units	61.7%	65.6%	51.5%
Renter-Occupied Housing Units	35.6%	27.8	42.5%
Vacant Housing Units	2.6%	6.6%	6.1%

Source: Esri Business Analyst Online, May 2024.

Household Income Distribution

The median household income in the Spring Valley DFA area is $85,031 (2023), lower than the overall County of San Diego, estimated at $95,879 (2023), as seen in Figure 6.

Figure 6. Median Household Income, Spring Valley comparisons (2023)



Compared to housing affordability, income levels in Spring Valley do not support the recommended 28% of pre-tax income spent on mortgage. Spring Valley homeowners spend on average 41.8% of household income on mortgage payments.

Community Amenities

Community amenities represent the facilities, infrastructure, and spaces that contribute to residential quality of life. They include features like restaurants, grocery stores, schools, street trees, parks, and other elements of daily necessity. The presence of these amenities, or lack thereof, can influence the demand for residential development.

"We need more trees and better landscaping of new buildings."
– Spring Valley Resident

Spring Valley has a healthy number of schools, parks and recreation facilities, and grocery retail stores. With respect to public transit, Spring Valley is serviced by several San Diego Metropolitan Transit System (MTS) bus stops, primarily along Sweetwater Road, Jamacha Road, and Jamacha Boulevard.

Additional neighborhood amenities were analyzed based on a three-mile trade ring from the center of the DFA area. The trade ring contains an ample number of schools/educational facilities and neighborhood parks/recreation. The trade ring contains several MTS bus stops, as well as access to the MTS Orange Line trolley, west of the DFA area in Lemon Grove. The trade ring contains two family health centers but is distant from larger medical centers/hospitals. The trade ring contains four grocery stores and pharmacies, two of which are located within the DFA area. A full breakdown of amenities in Spring Valley can be found in Table 39 with accompanying Maps 51 and 52.

Table 39. Spring Valley Community Amenities — Trade Ring (3 miles to center of DFA area)

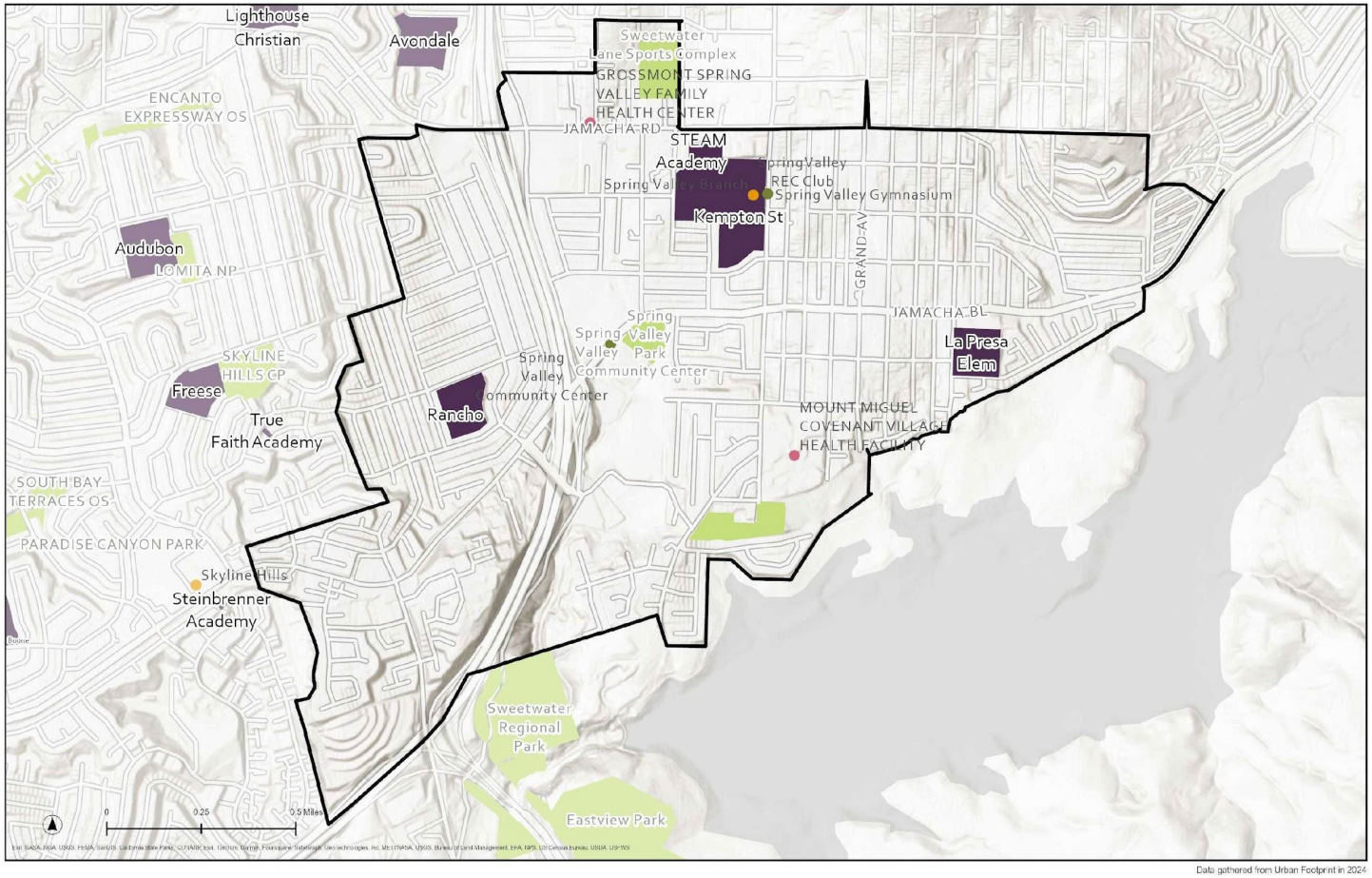
Amenity Category	Amenity
Public Transit	• MTS bus stops • MTS Green and Orange Line Stops
Schools/Educational Facilities	• Spring Valley Elementary School • Lemon Grove Academy Elementary School • Mount Miguel High School • Avondale Elementary School • Audubon K-8 School • Freese Elementary School • Sunnyside Elementary School • La Presa Elementary School • Rancho Elementary School • Bethune Elementary School • Sweetwater Springs Community Elementary School • Grossmont Secondary School

Table 39. Spring Valley Community Amenities — Trade Ring (3 miles to center of DFA area)

Amenity Category	Amenity
	• Bell Junior High School • Lemon Grove Middle School • Morse Senior High School • Monte Vista High School • STEAM Academy • Kempton Street Elementary • Quest Academy • Highlands Elementary
Hospital/Medical Centers	• Grossmont Spring Valley Family Health Center • Lemon Grove Family Health Center
Neighborhood Parks/Recreation	• Spring Valley County Park • Lamar County Park • Sweetwater Regional Park • Sweetwater Reservoir • Dictionary Hill County Preserve • Boone Park • Christopher Wilson Park • Keiller Park • Berry Street Park • Skyline Hills Park • Lemon Grove Park • Treganza Heritage Park • Lomita Park
Grocery Stores and Pharmacies	• Albertsons Grocery Store and Pharmacy • Rite Aid Pharmacy • Sprouts • Ralphs

Source: Keyser Marston Associates (KMA)

Map 51. Spring Valley Community Amenities

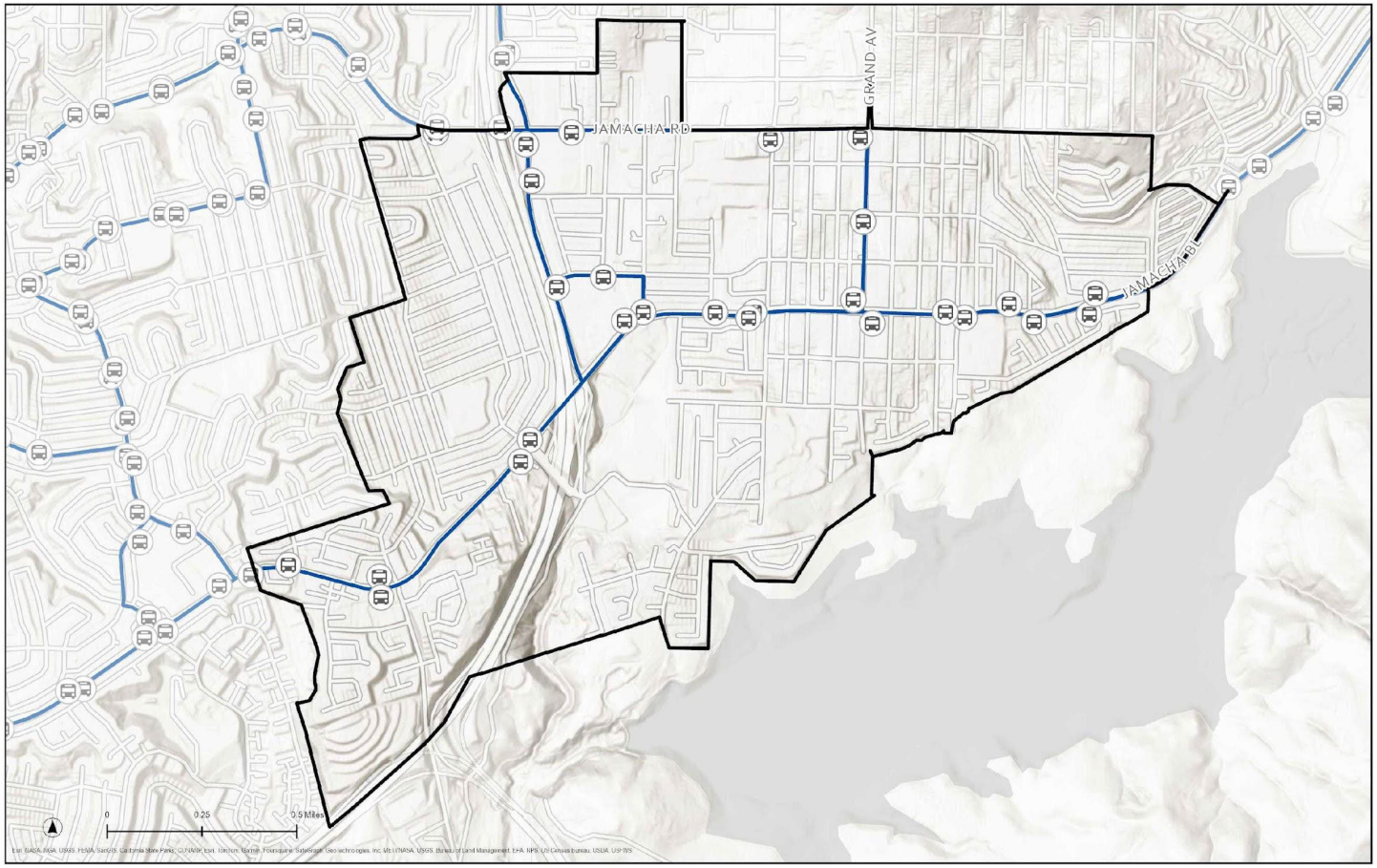


Data gathered from Urban Footprint in 2024

Spring Valley Community Amenities

- DFA Boundary
- Library
- Recreation Center
- Healthcare Facilities
- Parks
- Schools

Map 52. Spring Valley Transit



Data gathered from SanGIS in May 2024

Spring Valley Transit

DFA Boundary

Transit Stops

Transit Routes

Bus

Current Infrastructure

Spring Valley Roadways

The majority of this DFA area is served by public roads, with only a few minor private roads. Private roads can pose challenges to new development, as there may be inconsistent maintenance, varying road conditions, and unknown fees. Therefore, it is recommended for new development to occur along County-maintained public roads. Alternatively, public road access could be provided via easements or other means.

The Department of Public Works' (DPW) Infrastructure Gap Analysis Report (Exhibit B) identified roadways that provided connections to key points of interest within Spring Valley and provided recommendations for road corridor transformations to improve pedestrian and bicycle infrastructure for a more vibrant community space. Recommendations are preliminary and require further analysis and assessment of constraints. The following is a summary of the recommended roadways for improvements such as widening of roadways, bike lanes, road buffers, or medians in Spring Valley, as indicated in the Infrastructure Gap Analysis Report:

- **Jamacha Boulevard**, from Sweetwater Road to San Diego Street: add a buffer between the bike lane and travel lane, add a median and parkways, and increase right-of-way width to 98 feet.
- **Kempton Street**, from Jamacha Boulevard to Piedmont Street: add sidewalks and parkways.
- **Grand Avenue**, from San Diego Street to Apple Street: enhance bicycle facilities by adding buffers between bike lanes and travel lanes, add a median and parkways, and increase right-of-way width to 88 feet.
- **Grand Avenue**, from Apple Street to Birch: add sidewalks and parkways.
- **Quarry Road**, from Paradise Valley Road to SR 125 NB Ramps: add buffers between bike lanes and travel lanes.
- **Quarry Road**, from SR 125 NB Ramps to Swapmeet Main Road: add Class II bike lanes and buffers between the bike lanes and travel lanes, add parkways, and increase the right-of-way width to 88 feet.
- **Quarry Road**, from Swapmeet Main Road to Lakeview Avenue: add sidewalks and parkways, and add parking on both sides of the road.

For more information on the changes identified, see Exhibit B. For the existing roadways, see Map 53.

Spring Valley Water Service

Water services within the Spring Valley DFA area are provided by the Otay Water District and Helix Water District. Water service consists of backbone transmission mains with distribution mains serving areas of potential development. See Exhibit B for more information and Map 54 for existing pipes. The following are recommended water investments for Spring Valley:

- The Grand Avenue corridor potential areas of land use change may benefit from upsizing approximately 3,300 linear feet of water main from the existing 6" AC pipe to 16" PVC pipe. The primary consideration is the replacement of aging facility (AC pipe) and a secondary consideration is in pipe upsizing to meet long-term investment in future growth. Timing would match the anticipated market growth that could result in density increases, necessitating pipe upsizing. Therefore, the project may be phased into north and south at Jamacha Boulevard. This recommendation requires additional detailed project-specific study by the Otay Water District. The construction costs are estimated at $5,300,000.
- The Jamacha Boulevard corridor potential areas of land use change may benefit from upsizing approximately 2,100 linear feet of sewer main from the existing 10" AC pipe to a 12" PVC pipe. The primary consideration is the replacement of aging facility (AC pipe) and a secondary consideration is in pipe upsizing to meet long-term investment in future growth. Timing would match the anticipated market growth that could result in density increases, necessitating pipe upsizing. Therefore, the project may be phased into east and west at Grand Avenue after the SVW-1 project. This recommendation requires additional detailed project-specific study by the Otay Water District. The construction cost is estimated at $2,700,000.

Spring Valley Sewer Service

Sewer services within the Spring Valley DFA area are provided by the County of San Diego Sanitation District. Areas of development potential are either served by existing sewer mains or adjacent trunk mains. See Exhibit B for more information and Map 55 for currently existing pipes. The following are recommended sewer investments for Spring Valley:

- The Grand Avenue corridor potential areas of land use change may benefit from upsizing approximately 3,300 linear feet of sewer main from the existing 8" VCP pipe to a 12" PVC pipe. The primary consideration is the replacement of aging facility (VCP pipe) and a secondary consideration is in pipe upsizing to meet long-term investment in future growth. Timing would match the anticipated market growth that could result in density increases, necessitating pipe upsizing. Therefore, the project may be phased into north and south of the 15" VCP sewer between Saint George Street and San Francisco Street. This recommendation requires additional detailed project-specific study by the County of San Diego Sanitation District. The construction cost is estimated at $4,800,000.

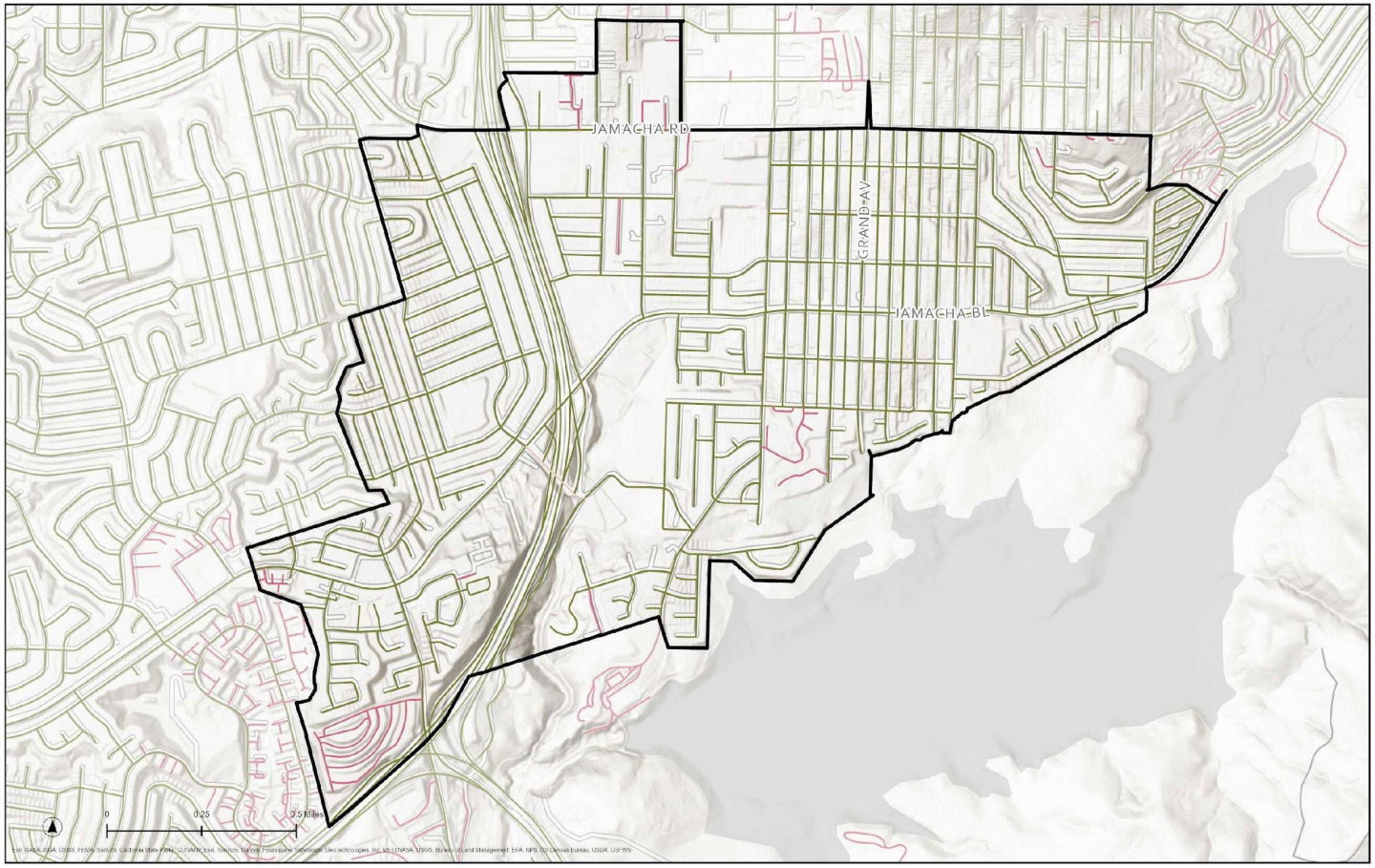
Spring Valley Stormwater Infrastructure

The Spring Valley DFA area lies within two County-managed Special Drainage Areas (SDA): SDA-1 (Spring Valley/Casa de Oro) and SDA-2 (Valle de Oro). Targeted improvements are planned to address aging stormwater volume/flood control infrastructure along Ashmore Avenue to address pipe conditions and to repair or replace 18" and 30" corrugated metal pipes and channel. In addition, the CIP identifies system improvements to improve stormwater quality, with the basin improvements described as having the parallel benefit of retention to reduce flow volumes:

- Multiple debris and access control grates
- Sweetwater Road Green Street Project: tree wells, trash capture

Individual development projects are required to comply with County requirements regarding retention of stormwater runoff onsite for both flood control and stormwater quality control purposes. Also, County Ordinance No. 7 (June 24, 1991) requires the payment of drainage fees as a condition for issuing any building permit.

Map 53. Spring Valley Roads



Data gathered from SanGIS in May 2024

Spring Valley Roads

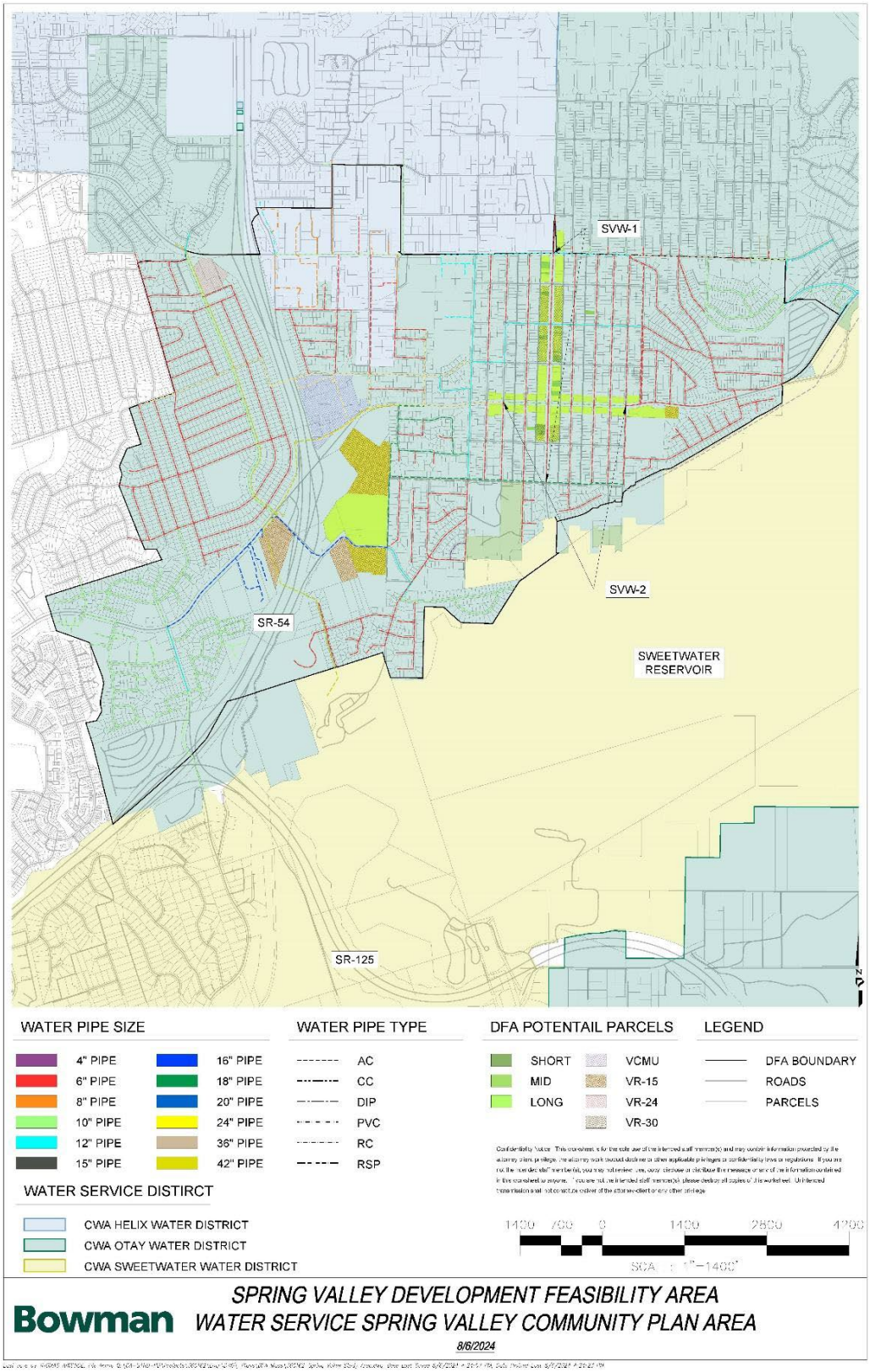
DFA Boundary

Dedicated

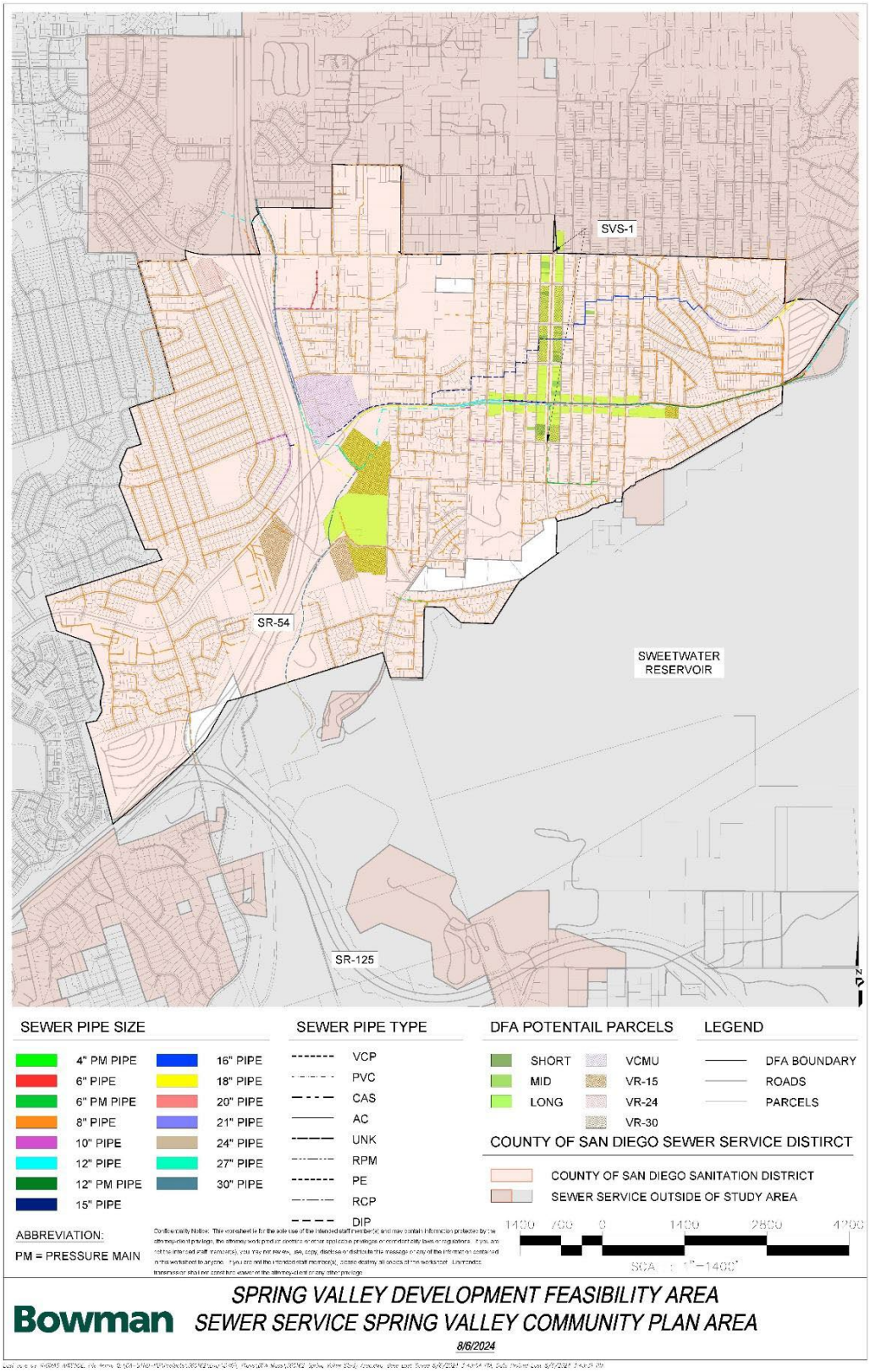
Private street

Undedicated

Map 54. Spring Valley Water Service



Map 55. Spring Valley Sewer Service



Housing Market Assessment

The following section provides a snapshot of opportunities, constraints, and the housing market analysis for Spring Valley. Information for this section was sourced from the Market Feasibility Assessment report produced in June 2024 by Keyser Marston Associates (KMA). For more detailed information on residential market trends, see Exhibit C.

Existing Conditions

The DFA area can generally be characterized by its retail adjacent to SR 125, auto-oriented uses along Grand Avenue and Jamacha Boulevard, single-family residential subdivisions, and the Spring Valley Swap Meet site.

"THERE ARE WAITING LISTS FOR APARTMENTS BECAUSE THERE AREN'T ENOUGH OF THEM."
— SPRING VALLEY RESIDENT

Residential Market Trends and Projected Demand in Housing Units

Table 32 depicts the projected demand for housing units and Table 33 depicts the potential residential development typologies for the Spring Valley DFA area. Supportable market demand is evaluated in the near-term (0 to 5 years), mid-term (5 to 10 years), and long-term (10 or more years). In addition, the following metrics were used as part of this evaluation: "strong" meaning highly likely to occur, "moderate" meaning likely to occur, and "weak" meaning unlikely to occur.

Table 32. Spring Valley Projected Housing Unit Demand (2025–2050)

Capture Level	Total Units	Units / Year
Low Capture	915 units	37 units / year
High Capture	1,373 units	55 units / year

Table 33. Spring Valley Market Support for Residential Typologies

Capture Level	Units / Year	Near-Term (0–5 years)	Mid-Term (5–10 years)	Long-Term (10+ Years)
For-Sale Residential Development Typologies				
Small Lot Single-Family	10 Units / acre	Weak	Weak	Weak
Townhomes	15–20 units / acre	Weak	Moderate	Moderate
Rental Residential Development Typologies				
Stacked Flat with Tuck-Under Parking	30+ units / acre	Weak	Weak	Moderate
Garden-Style Apartments	20–25 units / acre	Weak	Moderate	Moderate

Housing Development Financial Feasibility

Market-Rate Housing Development Financial Feasibility

This section provides a snapshot of housing prototypes and feasibility based on residential land values for Spring Valley. Information for this section was sourced from a Spring Valley Financial Feasibility Analysis produced in June 2024 by Keyser Marston Associates (KMA). For more detailed information on housing development financing trends, see Exhibit D.

The financial feasibility analysis involved formulating development prototypes for five candidate sites and evaluating financial pro forma inputs and assumptions to measure the economic feasibility of each development prototype. Factors from the Market Feasibility Assessment (Exhibit C) were factors in the Financial Feasibility Analysis (Exhibit D). The financial analysis for each development prototype was evaluated to determine the supportable residential land value. Each residual land value model incorporated estimates of development costs, market rents/values, and target developer returns reflective of recent comparable projects and available market and industry data.

Development prototypes that make financial sense generate positive residual land values that indicate that a developer or investor could acquire the site, construct the development, sell or lease the completed development, and receive at least an industry standard target return on their investment. A description of each housing typology evaluated in Spring Valley can be found in Table 34. As shown in Table 35, only the attached townhome prototype makes financial sense, with the other housing prototypes showing a negative financial outcome.

Table 34. Spring Valley Summary of Development Prototypes

Development Prototype	Illustrative Example	General Project Description
A Attached Townhomes		• 7.44-acre site • 15 units/gross acre • For-sale housing • 111 units • 3 stories • Attached garages • 1,621 SF average unit size
B Attached Townhomes (In-fill Site)		• 1.10-acre site • 24 units/gross acre • For-sale housing • 26 units • 3 stories • Attached garages • 1,323 SF average unit size
C Garden Apartments (Non-Contiguous Site)		• 0.71-acre site • 24 units/gross acre • Rental housing • 17 units • 2-3 stories • Surface/carports/attached garages • 930 SF average unit size
D Stacked Flat w/Surface and Tuck-Under Parking		• 0.50-acre site • 30 units/gross acre • Rental housing • 15 units • 3 stories • Surface and tuck-under parking • 795 SF average unit size
E Stacked Flat w/Ground Floor Commercial and Surface/ Tuck-Under Parking		• 1.23-acre site • 30 units/gross acre • Rental housing • 36 units • 1,000 SF commercial space • 3 stories • Surface and tuck-under parking • 800 SF average unit size

Table 35. Spring Valley Residual Land Values by Development Prototype

Product Type	A Attached Townhomes	B Attached Townhomes (In-fill Site)	C Garden Apartments (Non-Contiguous Site)	D Stacked Flat w/Surface and Tuck-Under Parking	E Stacked Flat w/Ground Floor Commercial and Surface/ Tuck-Under Parking
Tenure	For-Sale	For-Sale	Rental	Rental	Rental
Site Size (Gross)	7.44 Acres	1.10 Acres	0.71 Acres	0.50 Acres	1.23 Acres
Residual Land Value (2024 $)	$4,722,000 $43,000/Unit $15/SF Site (1)	$2,172,000 $84,000/Unit $45/SF Site (1)	($934,000) ($55,000)/Unit ($30)/SF Site (1)	($1,854,000) ($124,000)/Unit ($85)/SF Site (1)	($4,498,000) ($125,000)/Unit ($84)/SF Site (1)
Financial Feasibility Outcome	Moderate Positive	Strong Positive	Negative	Negative	Negative

(1) Reflects residual land value per SF of gross site area.

Land Use Analysis

Current Land Use Policy

The Spring Valley DFA area contains 4,594 parcels, largely supporting residential uses. Table 36 shows a breakdown of the land use designations found in Spring Valley and Map 56 demonstrates the distribution of the designations geographically.

Within Spring Valley, properties generally have good utilization, with only 28% of parcels identified as having low Building-to-Land-Value (BLV) (ratio <1) as seen in Map 57. BLV compares the assessed improvement value to the assessed land value. Land values that are higher than improvement values are generally seen as "underutilized lands," which are more likely to redevelop to optimize land values.

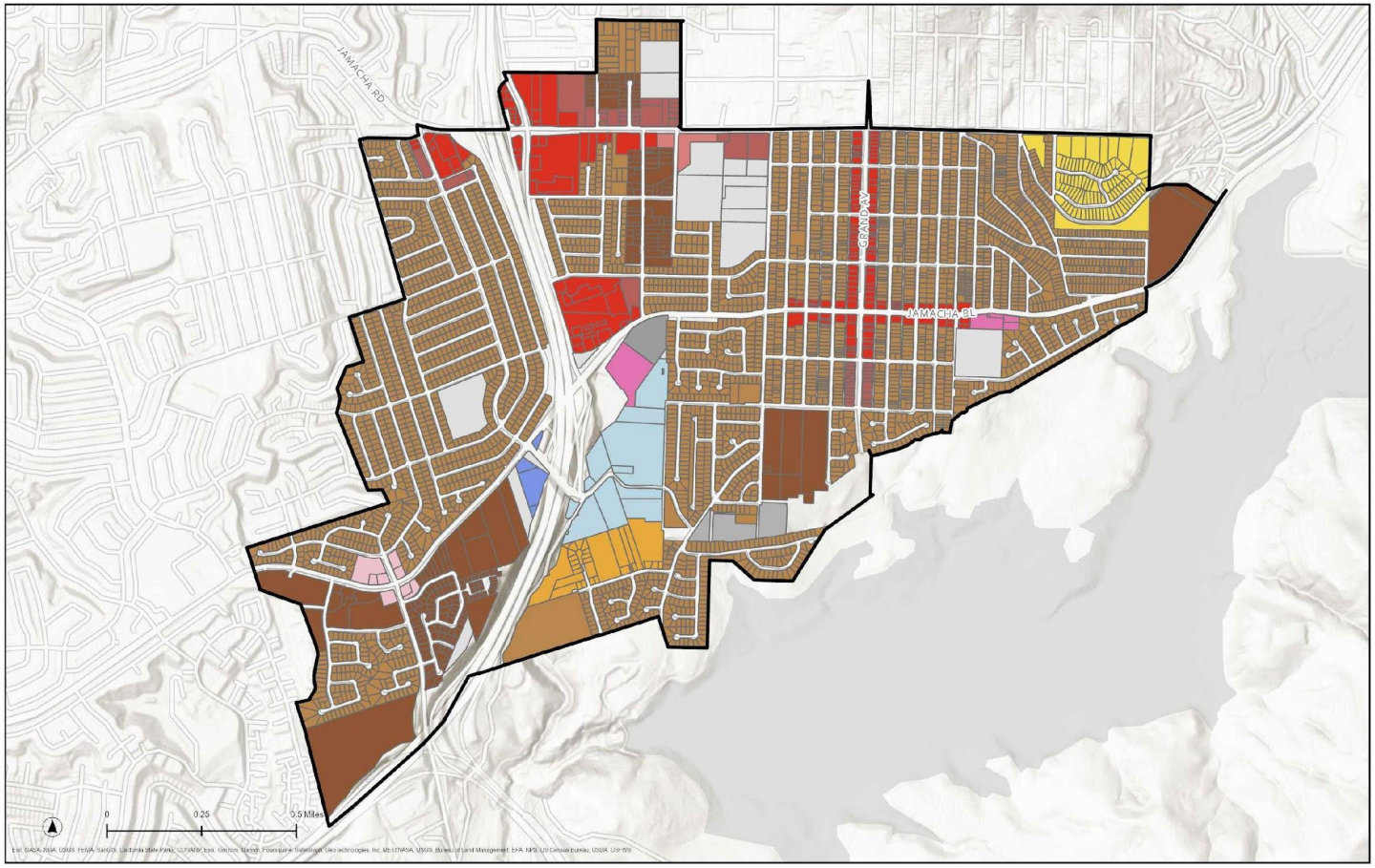
Table 36. Spring Valley Current Land Use Designations

Land Use Designation	Spring Valley Parcel Count	Percentage of Total
GENERAL COMMERCIAL	183	4.0%
NEIGHBORHOOD COMMERCIAL	11	0.2%
OFFICE PROFESSIONAL	6	0.1%
LIMITED IMPACT INDUSTRIAL	15	0.3%
MEDIUM IMPACT INDUSTRIAL	4	0.1%
OPEN SPACE (CONSERVATION)	-	0.0%
OPEN SPACE (RECREATION)	1	0.0%
PUBLIC AGENCY LANDS	5	0.1%
PUBLIC/SEMI-PUBLIC FACILITIES	18	0.4%
SEMI-RURAL RESIDENTIAL (SR-1)	-	0.0%
SEMI-RURAL RESIDENTIAL (SR-4)	-	0.0%
VILLAGE RESIDENTIAL (VR-2)	-	0.0%
VILLAGE RESIDENTIAL (VR-2.9)	92	2.0%
VILLAGE RESIDENTIAL (VR-4.3)	35	0.8%
VILLAGE RESIDENTIAL (VR-7.3)	3,940	85.8%
VILLAGE RESIDENTIAL (VR-10.9)	-	0.0%
VILLAGE RESIDENTIAL (VR-15)	229	5.0%
VILLAGE RESIDENTIAL (VR-20)	2	0.0%
VILLAGE RESIDENTIAL (VR-24)	53	1.2%
VILLAGE RESIDENTIAL (VR-30)	-	0.0%

Table 36. Spring Valley Current Land Use Designations

Land Use Designation	Spring Valley Parcel Count	Percentage of Total
VILLAGE CORE MIXED USE (VC-30)	-	0.0%
SPECIFIC PLAN AREA	-	0.0%
TOTAL	4,594	100%

Map 56. Spring Valley Land Use Designations (General Plan)



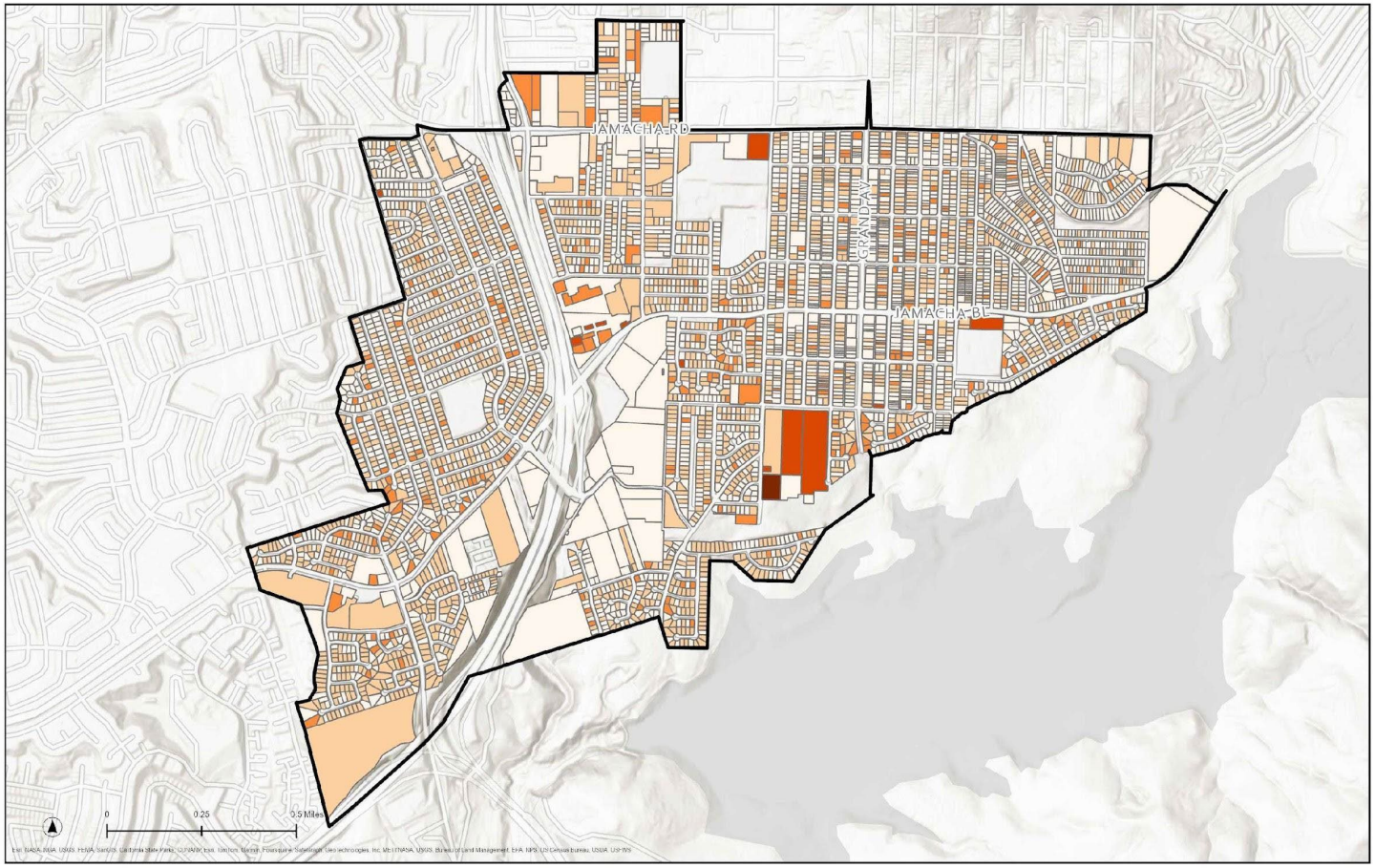
Data gathered from SanGIS in May 2024

Spring Valley Land Use

General Plan Land Use

- GENERAL COMMERCIAL
- LIMITED IMPACT INDUSTRIAL
- MEDIUM IMPACT INDUSTRIAL
- NEIGHBORHOOD COMMERCIAL
- OFFICE PROFESSIONAL
- OPEN SPACE (CONSERVATION)
- OPEN SPACE (RECREATION)
- PUBLIC AGENCY LANDS
- PUBLIC/SEMI-PUBLIC FACILITIES
- SPECIFIC PLAN AREA
- VILLAGE CORE MIXED USE
- SEMI-RURAL RESIDENTIAL (SR-1)
- SEMI RURAL RESIDENTIAL (SR-4)
- VILLAGE RESIDENTIAL (VR-2)
- VILLAGE RESIDENTIAL (VR-2.9)
- VILLAGE RESIDENTIAL (VR-4.3)
- VILLAGE RESIDENTIAL (VR-7.3)
- VILLAGE RESIDENTIAL (VR-10.9)
- VILLAGE RESIDENTIAL (VR-15)
- VILLAGE RESIDENTIAL (VR-20)
- VILLAGE RESIDENTIAL (VR-24)
- VILLAGE RESIDENTIAL (VR-30)

Map 57. Spring Valley Building-to-Land-Value (BLV)



Data gathered from SanGIS in May 2024

Spring Valley BLV

DFA Boundary

BLV (Improvement/Land Value)

- 0 - 1
- 2 - 3
- 4 - 10
- 11 - 42
- 43 - 110

Building to Land Value is calculated by dividing the assessed improvement value by the assessed land value. Information was gathered from SanGIS Zoning information. Parcels that are empty did not have assessed value available.

Housing Development

The housing density within Spring Valley is lower than what is permitted under current General Plan land use. As of 2024, there are 5,895 DU within the DFA area.[1] Map 58 displays the actual DU in Spring Valley. An objective of this study is to uncover ways to increase that number, while still providing high quality of life to current and future residents and addressing environmental constraints of the area.

"ONE WAY OR ANOTHER, HOUSING CAN BE BUILT."
— SPRING VALLEY RESIDENT

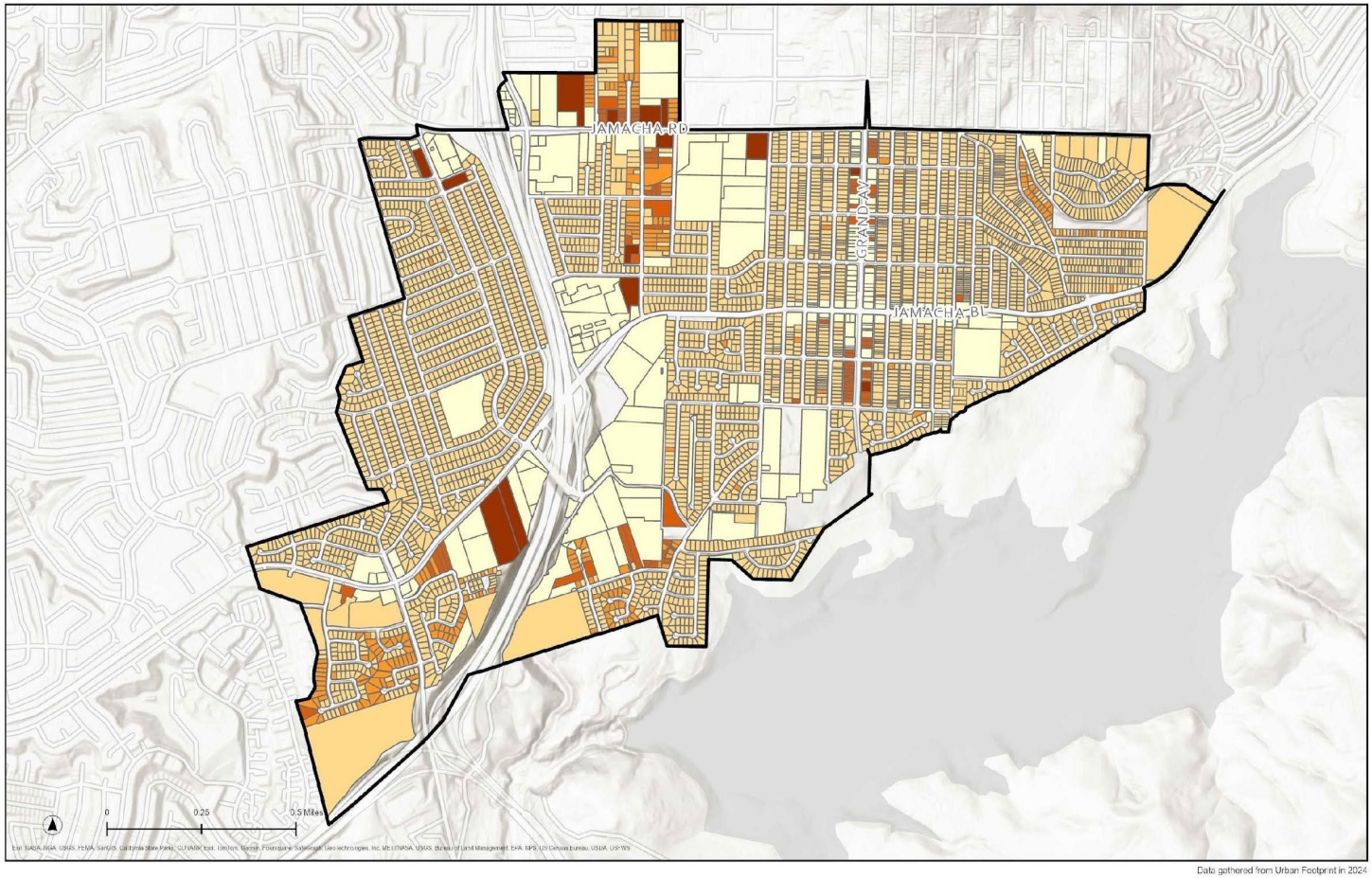
Environmental Constraints

Environmental conditions can have adverse effects on the housing market with impacts to housing density or form, structural or infrastructural costs, additional studies for land preparation, time delays, capacity considerations, safety risk, insurance, loans, and more. This study evaluated earthquake fault zones, airport hazard zones, airport noise, floodplains, wetlands, forest conservation, habitat preserve, environmentally sensitive areas, pre-approved mitigation zones, publicly owned lands, and slope as constraining factors to housing development. Fire risk was not included as a constraining factor. While it is acknowledged that the county faces increasing fire risk, the mitigation efforts around fire risk for housing development demote this factor as an environmental constraint for analysis purposes.

The main environmental constraints to housing development in Spring Valley are pre-approved mitigation area (PAMA) habitat-sensitivity areas, slope, and floodplains, covering 5%, 4%, and 2% of the land, respectively. These constraints can be seen in Maps 59, 60, and 61. While habitat sensitivity poses a strict challenge to development, steep slopes and floodplains can be mitigated to a reasonable degree for a cost. While risk and cost tolerance will vary depending on the developer, the buyer, and the market, it is the intention of this study to consider the most feasible options, i.e., the parcels that pose the lowest risk and have the highest potential for development.

[1] Current dwelling unit data sourced from UrbanFootprint.

Map 58. Spring Valley Actual Existing DUs



Data gathered from Urban Footprint in 2024

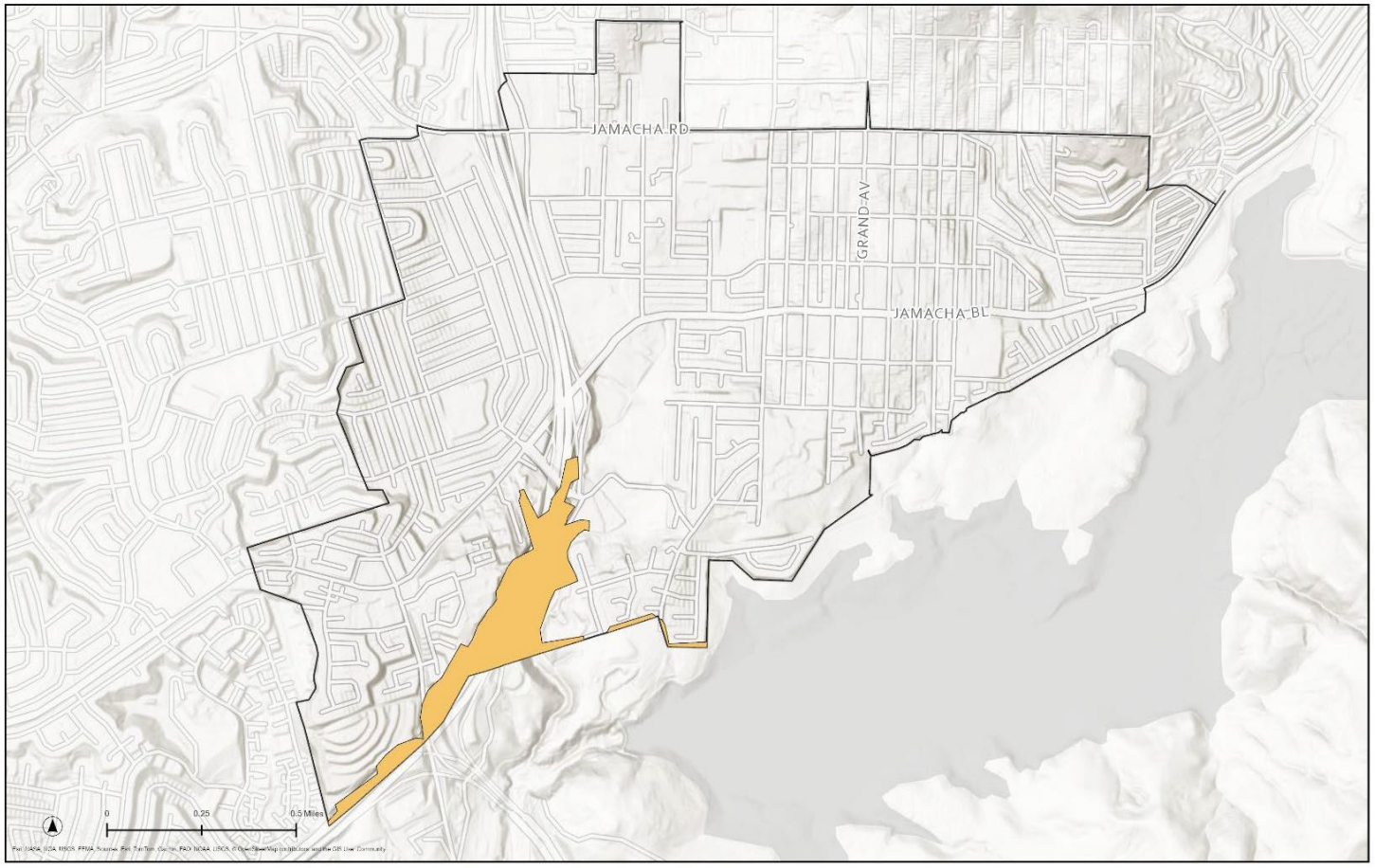
Spring Valley Dwelling Units

DFA Boundary

Number of Dwelling Units

0
1
2
3 - 13
14 - 264

Map 59. Spring Valley Pre-Approved Mitigation Areas (PAMA)

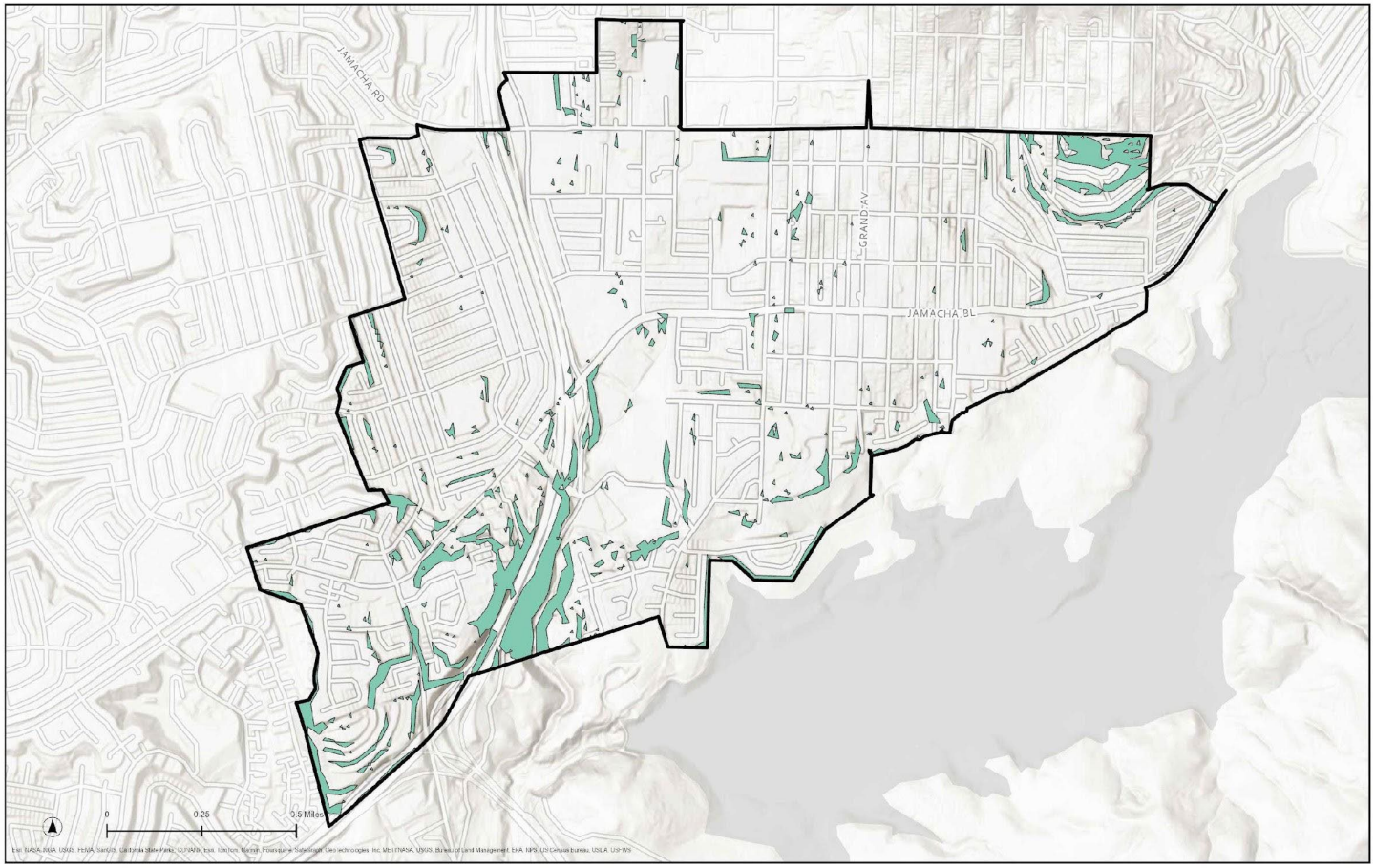


Data gathered from SanGIS in May 2024

Spring Valley Pre-Approved Mitigation

Pre-Approved Mitigation

Map 60. Spring Valley Topographic Slope

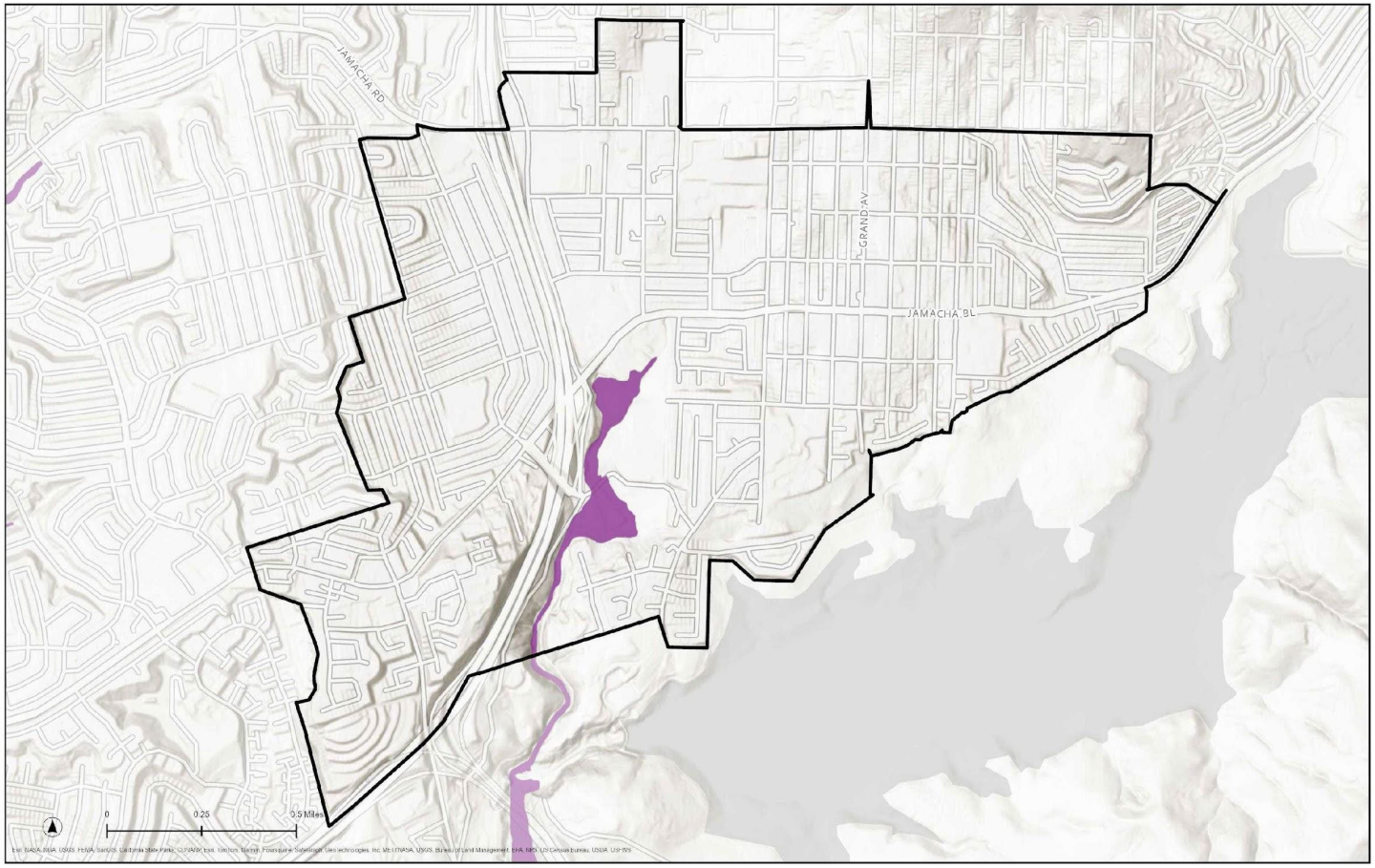


Data gathered from SanGIS in May 2024

Spring Valley Slope

Areas of slope greater than 25%

Map 61. Spring Valley Floodplains



Data gathered from Federal Emergency Management Agency

Spring Valley Flood Hazard

- 0.2% Annual Chance Flood Hazard
- 1% Annual Chance Flood Hazard
- Future Conditions 1% Annual Chance Flood Hazard
- Regulatory Floodway
- Area with Reduced Risk Due to Levee
- Special Floodway

Land Use Alternatives

To explore the impact of land use designations on housing development, three alternative land use scenarios were prepared for each DFA area (Exhibit E). This analysis is largely independent of the market analysis. The land use analysis revealed that current General Plan land use designations are not being fully utilized, meaning that increasing capacity alone would not necessarily lead to more housing development. Instead, it could artificially drive-up costs. To ensure a balanced approach, any proposed land use amendments must be evaluated holistically. The findings from this analysis will be shared with the County's Framework project to inform their review of land use designations. However, before any changes to land use are made, the key barriers identified in this report (Chapter 7) must first be addressed.

Under each alternative scenario, a modification of allowable dwelling units (DU) is unlocked. While this increase represents potential rather than actual, it is a strong supporter of housing development in unincorporated County areas if coupled with other improvements and incentives. Table 37 summarizes actual existing DU that are already built out (2024 Actual), expected unit yield under current zoning with no changes (Alternative 0), and expected unit yield under three alternatives that vary in intensity of modifications (Alternatives 1, 2, and 3). The land use alternative options see a shift in allowable DU. DU yields factor in land use designations, density allowances, unconstrained land acreage, yield factors, vacancy, and redevelopment potential. More information on methodology, parcel selection, and designation changes can be seen in Exhibit E.

Table 37. Spring Valley Dwelling Units per Alternative Scenario Summary

Dwelling Unit Yields	2024 Actual	Alternative 0	Alternative 1	Alternative 2	Alternative 3
Actual Existing Dwelling Units (2024)	5,895				
DU Yield on All Unconstrained Land		5,438	5,438	5,438	6,189
DU Yield on Unconstrained Vacant Land Only		54	54	54	209
DU Yield on Unconstrained Underutilized Land only (non-vacant)[1]		1,086	1,086	1,086	1,477

1. Underutilized land refers to parcels that have a Building-to-Land Value (BLV) of less than 1. A low BLV indicates that the value of improvements is less than the value of the land, and therefore, offers a strong financial incentive to redevelop for better property value.

Table 38 demonstrates the changes under each scenario by land use. Maps 62 and 63 reflect the alternative scenarios geographically.[2]

Table 38. Spring Valley Dwelling Units on All Unconstrained Land

Residential Land Use Designation	DU Density	Yield Factor [1]	Actual Existing DU[2]	DU Yield Alt 0	DU Yield Alt 1	DU Yield Alt 2	DU Yield Alt 3
GENERAL COMMERCIAL	n/a	-	138	-	-	-	-
LIMITED IMPACT INDUSTRIAL	n/a	-	-	-	-	-	-
MEDIUM IMPACT INDUSTRIAL	n/a	-	-	-	-	-	-
NEIGHBORHOOD COMMERCIAL	n/a	-	-	-	-	-	-
OFFICE PROFESSIONAL	n/a	-	-	-	-	-	-
OPEN SPACE (CONSERVATION)	n/a	-	-	-	-	-	-
OPEN SPACE (RECREATION)	n/a	-	-	-	-	-	-
PUBLIC AGENCY LANDS	n/a	-	-	-	-	-	-
PUBLIC/SEMI-PUBLIC FACILITIES	n/a	-	-	-	-	-	-
SPECIFIC PLAN AREA	40 DU / acre	70%	-	-	-	-	-
SEMI-RURAL RESIDENTIAL (SR-1)	1 DU / acre	70%	-	-	-	-	-
SEMI-RURAL RESIDENTIAL (SR-4)	1 DU / 4 acres	70%	-	-	-	-	-
VILLAGE RESIDENTIAL (VR-2)	2 DU / acre	70%	-	-	-	-	-
VILLAGE RESIDENTIAL (VR-2.9)	2.9 DU / acre	70%	89	40	40	40	40
VILLAGE RESIDENTIAL (VR-4.3)	4.3 DU / acre	70%	54	47	47	47	47

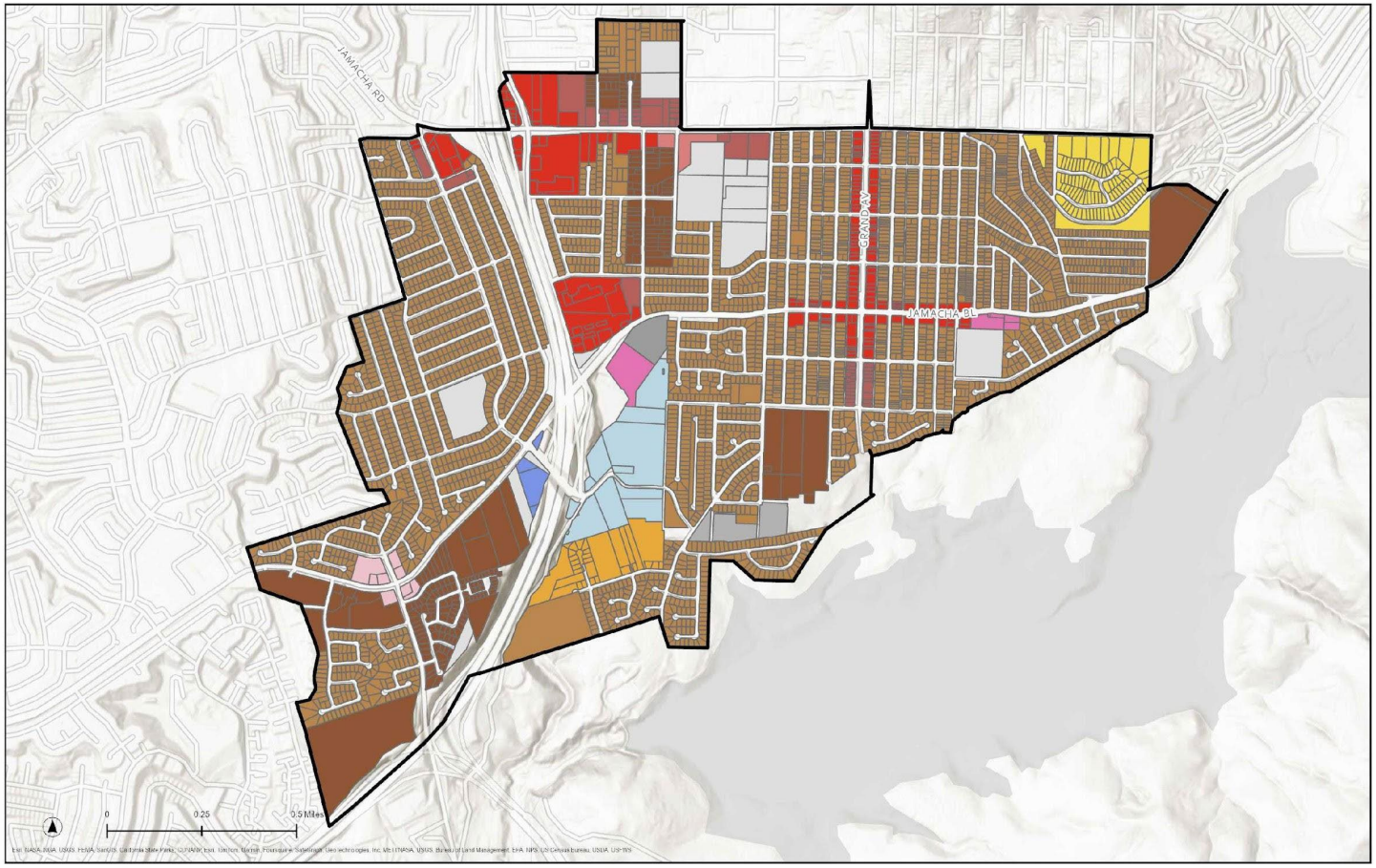
[2] Spring Valley is not recommended for any Land Use changes under Alternatives 1 and 2. Maps for these scenarios are not included.

VILLAGE RESIDENTIAL (VR-7.3)	7.3 DU / acre	70%	4,001	3,269	3,269	3,269	3,269
VILLAGE RESIDENTIAL (VR-10.9)	10.9 DU / acre	70%	-	-	-	-	-
VILLAGE RESIDENTIAL (VR-15)	15 DU / acre	62%	927	1,416	1,416	1,416	1,630
VILLAGE RESIDENTIAL (VR-20)	20 DU / acre	73%	32	58	58	58	58
VILLAGE RESIDENTIAL (VR-24)	24 DU / acre	89%	654	609	609	609	724
VILLAGE RESIDENTIAL (VR-30)	30 DU / acre	76%	-	-	-	-	226
VILLAGE CORE MIXED USE	30 DU / acres	32%	-	-	-	-	195
TOTAL			5,895	5,438	5,438	5,438	6,189

1. DU calculations include yield factors, which is a percentage based on actual yield expectations. See Data Notes for more info.

2. Source: UrbanFootprint (accessed 2024).

Map 62. Spring Valley Current Land Use (Alternative 0)



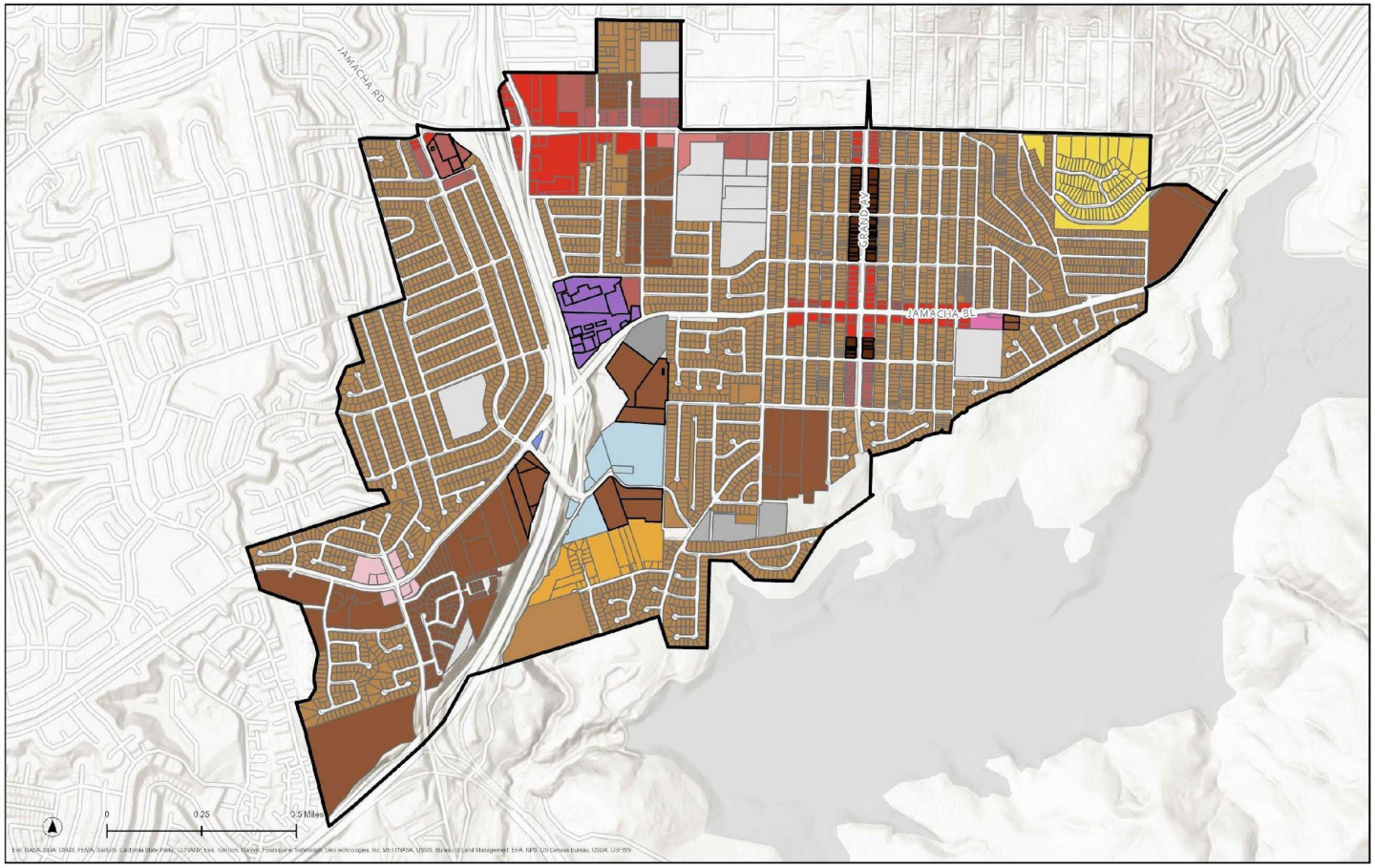
Data gathered from SanGIS in May 2024

Spring Valley Land Use

General Plan Land Use

- GENERAL COMMERCIAL
- LIMITED IMPACT INDUSTRIAL
- MEDIUM IMPACT INDUSTRIAL
- NEIGHBORHOOD COMMERCIAL
- OFFICE PROFESSIONAL
- OPEN SPACE (CONSERVATION)
- OPEN SPACE (RECREATION)
- PUBLIC AGENCY LANDS
- PUBLIC/SEMI-PUBLIC FACILITIES
- SPECIFIC PLAN AREA
- VILLAGE CORE MIXED USE
- SEMI-RURAL RESIDENTIAL (SR-1)
- SEMI-RURAL RESIDENTIAL (SR-4)
- VILLAGE RESIDENTIAL (VR-2)
- VILLAGE RESIDENTIAL (VR-2.9)
- VILLAGE RESIDENTIAL (VR-4.3)
- VILLAGE RESIDENTIAL (VR-7.3)
- VILLAGE RESIDENTIAL (VR-10.9)
- VILLAGE RESIDENTIAL (VR-15)
- VILLAGE RESIDENTIAL (VR-20)
- VILLAGE RESIDENTIAL (VR-24)
- VILLAGE RESIDENTIAL (VR-30)

Map 63. Spring Valley Land Use (Alternative 3)



Data gathered from SanGIS in May 2024

Spring Valley Alternative 3

Alternative 3
- Village Core Mixed Use
- Village Residential (VR-15)
- Village Residential (VR-24)
- Village Residential (VR-30)

General Plan Land Use
- GENERAL COMMERCIAL
- LIMITED IMPACT INDUSTRIAL
- MEDIUM IMPACT INDUSTRIAL
- NEIGHBORHOOD COMMERCIAL
- OFFICE PROFESSIONAL
- OPEN SPACE (CONSERVATION)
- OPEN SPACE (RECREATION)
- PUBLIC AGENCY LANDS
- PUBLIC/SEMI-PUBLIC FACILITIES
- SPECIFIC PLAN AREA
- VILLAGE CORE MIXED USE
- SEMI-RURAL RESIDENTIAL (SR-1)
- SEMI-RURAL RESIDENTIAL (SR-4)
- VILLAGE RESIDENTIAL (VR-2)
- VILLAGE RESIDENTIAL (VR-2.9)
- VILLAGE RESIDENTIAL (VR-4.3)
- VILLAGE RESIDENTIAL (VR-7.3)
- VILLAGE RESIDENTIAL (VR-10.9)
- VILLAGE RESIDENTIAL (VR-15)
- VILLAGE RESIDENTIAL (VR-20)
- VILLAGE RESIDENTIAL (VR-24)
- VILLAGE RESIDENTIAL (VR-30)

Conclusion

The technical analyses identified constraints in the Spring Valley DFA area that hinder residential development. The infrastructure analysis found if densities were to increase beyond the General Plan, then additional water and sewer upgrades would be necessary. The market analysis revealed that single-family homes in Spring Valley have lower values compared to regional averages, which discourages new investment and redevelopment. Demographic data showed that Spring Valley has an unemployment rate of 8.7%, which is higher than both the County and regional averages (5.2% and 4.9%, respectively). This weakens local purchasing power and reduces the attractiveness of the area for residential investment. The report highlights that access to large medical centers is limited, making the area less attractive to new residents, particularly those who require medical services nearby. The financial feasibility analysis indicated that rental rates for multifamily properties are below what is needed to make new development financially viable, leading to weak market support for apartment construction. The land use analysis found that much of Spring Valley's commercial development is designed for automobiles rather than walkability, limiting the potential for pedestrian-friendly, mixed-use residential growth.

Despite these challenges, the report highlights several key opportunities for housing growth. The infrastructure analysis identified improvements such as widening of roadways, bike lanes, road buffers, and medians, as well as water and sewer investments that were identified in Exhibit B. The market analysis shows that the nearby Eastern Chula Vista region has seen strong residential development trends, and Spring Valley can leverage this momentum by attracting developers and homebuyers looking for more affordable options. The land use analysis identified these corridors as ideal for mixed-use residential projects. Medium- to high-density multifamily and mixed-use development along Grand Avenue and Jamacha Boulevard could support local businesses while providing new housing options. The market analysis also found that there is moderate demand for townhomes and garden-style apartments, especially in areas where single-family homes are currently dominant. Encouraging lower-density growth in these areas can create a more gradual and feasible transition to higher-density housing over time.

To capitalize on these opportunities and address existing constraints, it is recommended that Spring Valley pursue grant funding to develop a Specific Plan that resolves residential and industrial land use conflicts through rezoning efforts. This plan should focus on retaining key General Commercial parcels along Grand Avenue to establish a vibrant and sustainable commercial corridor while also supporting local businesses through improved corridor design, area branding, and enhanced safety and amenities. Additionally, financing options such as Community Development Block Grants (CDBGs), Enhanced Infrastructure Financing Districts (EIFDs), and Infrastructure State Revolving Funds (ISRFs) should be explored to support the implementation of the Specific Plan.

Conclusion

07. Conclusion

The Development Feasibility Analysis (DFA) served as a pilot study to identify and validate barriers to housing development in four unincorporated communities: Buena Creek, Casa de Oro/Valle de Oro, Lakeside, and Spring Valley. These areas were selected for their proximity to transit, jobs, and essential services. A key question the DFA intended to answer was whether it is feasible to accommodate UA housing needs within these focused areas and what more can be done to encourage housing in these locations. Through parcel level analysis, the findings show that there is limited land availability within the DFA areas. On the vacant parcels, only 560 potential units could be accommodated. Underutilized parcels also offer development potential; however, the additional cost associated with demolition and redevelopment on parcels with existing structures substantially reduces the likelihood of housing being pursued on those lots. From an economic perspective, new housing development faces major barriers, with slim profit margins and financial barriers stemming from home values being lower than regional averages. While land use change (e.g., increasing density) is feasible in DFA areas, stakeholders emphasized the need to address other barriers before considering increasing densities. Despite existing barriers, a number of key recommendations were identified to address barriers to housing both broadly and specifically within DFA areas to support community revitalization and market improvements in the long term. The community conclusions, key barriers to housing development, and recommendations presented in this section are intended to inform strategic actions by the County to facilitate new housing development that aligns with community priorities.

Community Conclusions

While shared conditions were observed across the DFA areas, each community presents unique barriers and opportunities that influence development feasibility. The following summary begins with common findings, followed by distinct conclusions for each area, emphasizing the need for localized, tailored solutions.

Common conditions identified across the DFA areas include:

- Vacant land suitable for housing development is limited.
- Market conditions and home prices in the DFA areas are not currently attracting developer investments.
- Opportunities for infrastructure improvements (e.g., pedestrian and mobility amenities, roadway investments, and parks) were identified to support long-term market conditions.
- Profitable home sale values across both single family and attached housing types are not attainable for local income levels, driving a lack of new homes and a stagnant market.
- Townhomes, which support increased density over time, both make financial sense and are marketable.
- Recent development has not achieved maximum General Plan capacity, indicating density increases may not support additional development at this time given regulatory, market, and financial conditions.

Buena Creek DFA Area
Market Strength: The Buena Creek DFA area has potential for higher density development given its location near transit, such as the Buena Creek Sprinter Station.
Barriers: Constrained roadways and the potential requirement for costly roadway upgrades may be hindering new development. For example, congestion at the South Santa Fe Avenue and Buena Creek Road intersection requires substantial investments and agency coordination to improve.
Opportunities: The roadway condition at South Santa Fe Avenue and Buena Creek Road is being addressed through cooperative partnerships with the North County Transit District (NCTD) and County efforts to secure grant funding to support comprehensive planning in this area.

Lakeside DFA Area
Market Strength: Not applicable. The Lakeside DFA area showed limited demand and potential for new homes at the time of the analysis.
Barriers: Market challenges and limited amenities reduce the appeal for new development.
Opportunities: Expansion of amenities and job centers will be necessary to support and stimulate new housing development.

Spring Valley DFA Area
Market Strength: Not applicable. Spring Valley DFA area has some available land for development, but nearby incompatible land uses may be limiting market interest.
Barriers: Incompatible land uses, such as industrial facilities and auto repair shops near homes, limit the desirability to build and buy homes on available land.
Opportunities: Planning efforts to improve land use compatibility are needed to promote housing development.

Valle de Oro/Casa de Oro DFA Area
Market Strength: The Valle de Oro/Casa de Oro DFA area has a Specific Plan in place that supports connectivity, transit, diverse housing types, adequate parking, art, and entertainment.
Barriers: While garden style apartments were the only rental type to test financially positive in the Valle de Oro/Casa de Oro DFA area, other housing types may face challenges without additional flexibility across all of the DFA areas.
Opportunities: The Specific Plan includes customized development regulations that can be leveraged to support additional housing types, providing flexibility and encouraging growth.

Building on these community-level findings, the following key barriers section outlines how these localized conditions contribute to broader barriers hindering development. Understanding this connection provides a foundation for developing informed recommendations that directly address identified barriers, thereby creating a strategic pathway from community challenges to actionable solutions.

Key Barriers to Housing Development

Barriers to housing development were identified through quantitative technical analyses and qualitative stakeholder assessments of the DFA areas and the broader unincorporated County. The community conclusions section outlines localized conditions and observed development patterns in each community (e.g., market, infrastructure) that influence development feasibility. This section builds upon those conclusions to synthesize why housing development is not occurring and highlights broader systemic issues that limit housing production. While some barriers are derived directly from the DFA findings, others reflect conditions and challenges that exist throughout the unincorporated county. Together, they present a comprehensive picture of the development constraints and were instrumental in shaping the actionable recommendations described in the following section. The first four are broad, systemic barriers that impact the entire unincorporated county, while the final three barriers are specific to the DFA areas.

DFA Barriers

Barrier 1. Market conditions do not currently support development or redevelopment, as supportable sales prices in DFA areas are substantially lower than current regional market values. Housing development projects, to support the local affordability, can only support land prices below current market values.

Barrier 2. Developable land is limited.

Barrier 3. Regulations are complicated, and the discretionary process can be costly and time-consuming for developers. VMT mitigation and standards are confusing and unclear.

Barrier 4. Current development regulations (e.g., zoning standards such as setbacks, minimum lot sizes, height and building types) can prevent General Plan densities from being achieved.

Barrier 5. Housing that is attainable for current residents is a challenge.

Barrier 6. Coordination with external utility service providers (e.g., water, sewer) can be complex, and stormwater compliance can add significant costs to housing development.

Barrier 7. Amenities such as parks, sidewalks, bike lanes, and job centers are lacking, creating barriers to housing development and hindering economic development and placemaking.

These seven barriers provide the foundation for the recommendations described in the next section. While the Community Conclusions highlight specific challenges observed in each DFA area, the Key Barriers reflect the underlying causes such as regulatory complexity, financial feasibility, and

infrastructure limitations that prevent housing development. These recommendations have been crafted to directly address these barriers, building a path from observed challenges to actionable solutions for increasing housing production.

Additionally, each DFA area has unique barriers which require tailored solutions. The report recommends pursuing specific planning efforts within the DFA areas to address these unique needs and to support the development of thriving communities. These planning efforts, combined with changes to County policies and procedures intended to reduce the time and cost of the development process, may create more favorable financial and market conditions and support a variety of housing types beyond single family homes and townhomes. The full list of recommendations to create opportunities for more housing development in the DFA areas can be found in the Recommendations section below.

Recommendations

The recommendations outlined below are designed to establish the policy, regulatory, and infrastructure conditions necessary for the market to respond more effectively over time. While most of the recommended actions will be initiated in the near term, the full market impact, including increased housing production, is expected to occur over a longer timeframe.

The findings of the market, financial, infrastructure, and land use technical analyses and the input received from stakeholders regarding perceived barriers to housing production and sustainable development opportunities within the DFA areas informed recommendations.

The recommendations look to address the key barriers to development and to facilitate housing development within DFA areas. Over the course of meetings with industry stakeholders and community workshops, recommendations were identified and refined into the eight recommendations below to represent the critical actions that can be taken by the County to support housing development.

While the analysis focused within the DFA communities, several key recommendations would address housing barriers more broadly across the unincorporated county. These recommendations are intentionally crafted to respond directly to the identified barriers and community-level conditions, ensuring a coherent and strategic flow from understanding challenges to implementing solutions. Key recommendations align with and expand upon the County's existing work efforts through initiatives such as the Housing Element Implementation Plan, Removing Barriers to Housing, and the Framework, where possible to ensure seamless implementation.

The DFA findings validate the need to prioritize key Housing Element implementation items including updating the Zoning Ordinance to align with the General Plan and identifying opportunities for more housing streamlining including ministerial processing. The recommendations will be used to inform current and future planning and infrastructure efforts across the DFA areas and the unincorporated County. Key DFA recommendations are provided below.

Prioritize Infrastructure Investments to Support Housing within DFA Communities. Each DFA community has unique needs for infrastructure investments. Some investments—such as sidewalks, bike lanes, parks and libraries–while not required, would increase community desirability and over time, potentially incentivizing demand for housing. Other infrastructure needs to more directly contribute to developers' investments and could remove barriers to housing, such as funding for major roadway improvements or regional stormwater infrastructure. This recommendation would evaluate opportunities to prioritize Capital Improvement Plan (CIP) funding for sidewalks, bike lanes, and other mobility improvements such as landscaped parkways and trees that align with County's Climate Action Plan (CAP) goals. Within Buena Creek, evaluating and prioritizing transportation infrastructure constraints– specifically around the Sprinter Station, in coordination with the North County Transit District and surrounding cities could reduce developer costs associated with infrastructure investments ultimately needed to support housing. Addressing infrastructure constraints strategically and in alignment with demand for housing would ensure investments are

focused in ways that support housing production over the long term. While upgrades to water and sewer infrastructure are not needed in the short term to serve planned densities, these investments may be needed if densities are increased. Identifying a prioritization strategy for CIP investments can be achieved in the near-term, while overall infrastructure investments will be a long-term effort.

Advance Community Revitalization Through Workforce Development. This recommendation calls for leveraging the County's Office of Economic Development and Government Affairs to encourage new employment opportunities to support economic vitality in DFA communities to attract more investments and improve market conditions for housing. Fostering job creation, supporting small businesses, and developing opportunities for workforce development would improve local economic conditions, increase purchasing power for local residents, and uplift DFA communities.

Expand Land Availability for Housing. This recommendation calls on expanding the availability of land suitable for housing development by exploring updates to the Zoning Ordinance or other policies to facilitate housing on educational, religious, and institutional sites, in addition to surplus county land. Increasing availability of land suitable for housing and providing added flexibility for housing development on surplus county land encourages more housing construction.

Amend County Regulations to Increase Certainty and Flexibility to Maximize Housing Development. This near-term recommendation is to update zoning regulations to ensure the current General Plan's densities can be achieved. This could be done by providing more flexibility in housing regulations in areas such as setbacks, height, and housing typologies. This aligns with an existing Housing Element implementation action that would effectively reduce processing time and cost associated with a need for rezones or other discretionary actions to achieve planned densities. Ensuring development regulations allow for planned densities would provide developers with more clarity on an area's development potential. This action also recommends clarifying County VMT regulations to increase certainty for housing development.

Fast Track Housing Permitting and Boost Resources to Incentivize Housing. This recommendation calls to implement streamlining efforts at all stages of County permitting to reduce developers cost and time in obtaining housing entitlements. This includes exploring options to expand on existing self-certification programs and shifting more permits from discretionary to ministerial. This recommendation would also boost resources and assistance to local developers to encourage unincorporated area housing production. This recommendation includes near term actions including bringing forward solutions for more housing streamlining as part of the Grading Ordinance and By-Right Housing project by 2027.

Pursue Funding to Build More Affordable Housing. This recommendation calls to identify new funding streams to increase the number of deed restricted affordable housing units on the market, which is not viable for developers without public investments. In addition to increasing the overall supply of affordable housing, adopting a local Inclusionary Housing Ordinance for the unincorporated area would support home production at a variety of affordability levels, in addition to offering a new funding stream for overall deed-restricted units through in-lieu fees.

Advocate for Legislation that Supports Housing. This recommendation calls for the County to use its legislative program to advocate for housing supportive legislation, including support for housing streamlining opportunities, funding for affordable housing, and other actions supportive of addressing the housing crisis.

Explore Targeted Planning Efforts and Specific Plans in Buena Creek, Lakeside, and Spring Valley. Through the DFA stakeholder outreach, several community specific recommendations and needs were identified. Through targeted planning efforts, such as Specific Plans, a more cohesive community vision can be defined to support community based placemaking and community identity. Targeted planning would also serve as a vehicle to explore funding mechanisms such as grants, EIFDs, CFDs, Special Assessments, LLMDs, or CDBGs to support community investments.

Recommendations from the technical analyses and stakeholder input related to infrastructure and land use changes will be used to inform current and future planning and infrastructure efforts. Department of Public Works' (DPW) Infrastructure Gap Analysis IIGA) is part of a longer-term CIP that requires grant funding and implementation of local funding districts. It will inform County infrastructure projects in the DFA areas, the recommended Specific Plans, and prioritization of sidewalk and bike lane infrastructure through the County's CAP implementation. The Framework, a holistic policy approach that looks broadly at sustainable planning and development across the entire unincorporated area, will take the land use alternatives identified in the DFA's Land Use Analysis under consideration as an essential part of its efforts. The Infrastructure Analysis Report identifies water and sewer infrastructure that could need to be upsized if density increases beyond the General Plan were to occur.

Each DFA recommendation, the key barriers the recommendation addresses, along with anticipated outcomes and timeframes are provided in Table 39. The recommendations are actions that are within the control of or can be influenced by the County; however, it is recognized that the ultimate production of housing in DFA areas is dependent on many outside factors including but not limited to market conditions and construction costs. While this report intends to highlight barriers and opportunities for housing in the DFA areas and presents recommendations to support housing, it is recognized that improved market conditions in the DFA areas will take substantial investments and broader economic change.

To advance DFA recommendations, County staff submitted a Smart Growth Incentive Program (SGIP) Cycle 6 grant application in spring 2025 to pursue funding for the creation of a Buena Creek Specific Plan. This application builds on DFA findings by proposing a comprehensive vision for land use, mobility, equity, and housing production around the Sprinter station. In addition, to support funding for community revitalization and investments within the Casa de Oro Specific Plan, the County facilitated a Business Improvement District Survey to gauge the need and level of interest in pursuing financing and maintenance district options to support improvements along the Campo Road commercial corridor and surrounding community.

These initiatives illustrate how DFA recommendations are being implemented to advance community revitalization, prioritize infrastructure investments, and support housing production.

Table 39: Recommendations

Recommendation	Barrier	Outcome	Timeframe[1]
Recommendation 1: Prioritize Infrastructure Investments to Support Housing within DFA Communities. Each DFA community has unique needs for infrastructure investments. Some investments—such as sidewalks, bike lanes, parks and libraries–while not required, would increase community desirability and over time, potentially incentivize demand for housing. Other infrastructure needs more directly contribute to developers' investments and could remove barriers to housing, such as funding for major roadway improvements or regional stormwater infrastructure. This recommendation would evaluate opportunities to prioritize Capital Improvement Program (CIP) funding for sidewalks, bike lanes, and other mobility improvements such as landscaped parkways and trees that align with CAP goals. Within Buena Creek, evaluating and prioritizing transportation infrastructure constraints– specifically around the Sprinter Station, in coordination with the North County Transit District and surrounding Cities could reduce developer costs associated with infrastructure investments ultimately needed to support housing. Addressing infrastructure	**Barrier 1:** Market conditions do not currently support development or redevelopment, as supportable sales prices in DFA areas are substantially lower than current regional market values. Housing development projects, to support the local affordability, can only support land prices below current market values. **Barrier 6:** Coordination with external utility service providers (e.g., water, sewer) can be complex, and stormwater compliance can add significant costs to housing development. **Barrier 7:** Amenities such as parks, sidewalks, bike lanes, and job centers are lacking, creating barriers to housing development and hindering economic development and placemaking.	Improve and install new infrastructure to support more housing production.	Ongoing as funding becomes available

[1] Timeframe and anticipated completion are dependent on successful RFPs, contracting, grant funding, and other factors outside of direct staff control. Therefore, the timelines provided here are estimates and are subject to change.

Table 39: Recommendations

Recommendation	Barrier	Outcome	Timeframe[1]
constraints strategically and in alignment with demand for housing would ensure investments are focused in ways that support housing production over the long term. While upgrades to water and sewer infrastructure are not needed in the short term to serve planned densities, these investments may be needed if densities are increased. Identifying a prioritization strategy for CIP investments can be achieved in the near-term; while overall infrastructure investments will be a long-term effort.			
Recommendation 2: Advance Community Revitalization Through Workforce Development. This recommendation calls for leveraging the County's Office of Economic Development and Government Affairs to encourage new employment opportunities to support economic vitality in DFA communities to attract more investments and improve market conditions for housing. Fostering job creation, supporting small businesses, and developing opportunities for workforce development would improve local economic conditions, increase purchasing power for local residents, and uplift DFA communities.	**Barrier 1:** Market conditions do not currently support developme-nt or redevelopment, as supporta-ble sales prices in DFA areas are substantially lower than current regional market values. Housing development projects, to support the local affordability, can only su-pport below current market values. **Barrier 7:** Amenities such as parks, sidewalks, bike lanes, and job cen-ters are lacking, creating barriers to housing development and hind-ering economic development and placemaking.	Revitalize local economies to support new employ-ment opportunities and livable wages. Increase purchasing power of local residents.	Ongoing effort led by the County of Economic Develo-pment and Govern-ment Affairs (EDGA)

Table 39: Recommendations

Recommendation	Barrier	Outcome	Timeframe[1]
Recommendation 3: Expand Land Availability for Housing. This recommendation calls on expanding the availability of land suitable for housing development by exploring updates to the Zoning Ordinance or other policies to facilitate housing on educational, religious, and institutional sites, in addition to surplus county land. Increasing availability of land suitable for housing and providing added flexibility for housing development on surplus county land encourages more housing construction.	**Barrier 1:** Market conditions do not currently support development or redevelopment, as supportable sales prices in DFA areas are substantially lower than current regional market values. Housing development projects, to support the local affordability, can only support land prices below current market values. **Barrier 2:** Developable land is limited.	More low-cost available land for housing development, particularly affordable housing development	Anticipated Completion in 2027

Table 39: Recommendations

Recommendation	Barrier	Outcome	Timeframe[1]
Recommendation 4: **Amend County Regulations to Increase Certainty and add Flexibility and Maximize Housing Development.** This near-term recommendation is to update zoning regulations to ensure the current General Plan's densities can be achieved. This could be done by providing more flexibility in housing regulations in areas such as setbacks, height, and housing typologies. This aligns with an existing Housing Element implementation action that would effectively reduce processing time and cost associated with a need for rezones or other discretionary actions to achieve planned densities. Ensuring development regulations allow for planned densities would provide developers with more clarity on an area's development potential. This action also recommends clarifying County VMT regulations to increase certainty for housing development.	**Barrier 3:** Regulations are complicated, and the discretionary process can be costly and time-consuming for developers. VMT mitigation and standards are confusing and unclear. **Barrier 4**: Current development regulations (e.g., zoning standards such as setbacks, minimum lot sizes, height and building types) can prevent General Plan densities from being achieved. **Barrier 5**: Housing that is attainable for current residents is a challenge.	Increased potential to achieve General Plan densities. More flexible development regulations to allow housing to be responsive to changing market conditions. Increased certainty and transparency.	General Plan and Zoning alignments are a Housing Element implementation item that was initiated in 2025. Anticipated Completion in 2027.

Table 39: Recommendations

Recommendation	Barrier	Outcome	Timeframe[1]
Recommendation 5: Fast Track Housing Permitting and Boost Resources to Incentivize Housing. This recommendation calls to implement streamlining efforts at all stages of County permitting to reduce developers cost and time in obtaining housing entitlements. This includes exploring options to expand on existing self-certification programs and shifting more permits from discretionary to ministerial. This recommendation would also boost resources and assistance to local developers to encourage unincorporated area housing production. This recommendation includes near term actions including bringing forward solutions for more housing streamlining as part of the Grading Ordinance and By-Right Housing project by 2027.	**Barrier 3:** Regulations are complicated and the discretionary process can be costly and time-consuming for developers. VMT mitigation and standards are confusing and unclear. **Barrier 4:** Current development regulations (e.g., zoning standards such as setbacks, minimum lot sizes, height and building types) can prevent General Plan densities from being achieved. **Barrier 5:** Housing that is attainable for current residents is a challenge.	Updated regulations that provide increased certainty and transparency. More ministerial processing options for housing. Lower up-front and long-term cost of developing in the county.	Anticipated Completion - 2027
Recommendation 6: Pursue Funding to Build More Affordable Housing. This recommendation calls to identify new funding streams to increase the number of deed restricted affordable housing units on the market, which is not viable for developers without public investments. In addition to increasing the overall supply of affordable housing, adopting a local Inclusionary Housing Ordinance for the unincorporated area would support home production at a variety of affordability levels, in addition to offering a new funding stream for overall deed-restricted units through in-lieu fees.	**Barrier 1:** Market conditions do not currently support development or redevelopment, as supportable sales prices in DFA areas are substantially lower than current regional market values. Housing development projects, to support the local affordability, can only support land prices below current market values. **Barrier 5:** Housing that is attainable for current residents is a challenge.	Funding stream to support affordable housing development and increased development of affordable units	Anticipated Completion in 2027

Table 39: Recommendations

Recommendation	Barrier	Outcome	Timeframe[1]
Recommendation 7: Advocate for Legislation that Supports Housing. This recommendation calls for the County to use its legislative program to advocate for housing supportive legislation, including support for housing streamlining opportunities, funding for affordable housing, and other actions supportive of addressing the housing crisis.	**Barrier 3:** Regulations are complicated, and the discretionary process can be costly and time-consuming for developers. VMT mitigation and standards are confusing and unclear. **Barrier 5:** Housing that is attainable for current residents is a challenge.	Legislation supportive of housing streamlining, affordable, and inclusive housing.	Ongoing
Recommendation 8: Explore Targeted Planning Efforts and Specific Plans in Buena Creek, Lakeside, and Spring Valley. Through the DFA stakeholder outreach, several community specific recommendations and needs were identified. Through targeted planning efforts, such as Specific Plans, a more cohesive community vision can be defined to support community based placemaking and community identity. Targeted planning would also serve as a vehicle to explore funding mechanisms such as grants, EIFDs, CFDs, Special Assessments, LLMDs, or CDBGs to support community investments	**Barrier 1:** Market conditions do not currently support development or redevelopment, as supportable sales prices in DFA areas are substantially lower than current regional market values. Housing development projects, to support the local affordability, can only support land prices below current market values. **Barrier 6:** Coordination with external utility service providers (e.g., water, sewer) can be complex, and stormwater	Community specific development regulations that support housing. Local planning to support community revitalization and exploration of funding mechanisms to support infrastructure and community investments.	A grant application for a Buena Creek Specific Plan was submitted to SANDAG in Spring 2025. Seek future grant funding for Specific Plans along Grant Avenue in Spring Valley in 1-2 yrs and along Woodside Drive in Lakeside in 2-4 yrs

Table 39: Recommendations

Recommendation	Barrier	Outcome	Timeframe[1]
	compliance can add significant costs to housing development. **Barrier 7:** Amenities such as parks, sidewalks, bike lanes, and job centers are lacking, creating barriers to housing development and hindering economic development and placemaking.		