# 2021 KING COUNTY URBAN GROWTH CAPACITY REPORT

April 2021 ▪ Preliminary DRAFT

King County

# Acknowledgements

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# About this Draft Report

The Urban Growth Capacity Report is King County's buildable lands report. King County is a Growth Management Act (GMA) jurisdiction and must plan to accommodate projected growth within its boundaries, with most growth focused into urban growth areas (UGAs) where urban services are available or can be made available. This report includes preliminary findings from three key components of King County's Buildable Lands Program which are required under RCW 36.70A.215 and WAC 365-196-315:

- Analysis of countywide and jurisdictional growth trends between 2006 and 2018 compared to 2035 CPP targets.
- Analysis of achieved densities by jurisdiction based on growth that occurred between 2012 and 2018.
- Capacity for housing and job growth over the next 20 years.

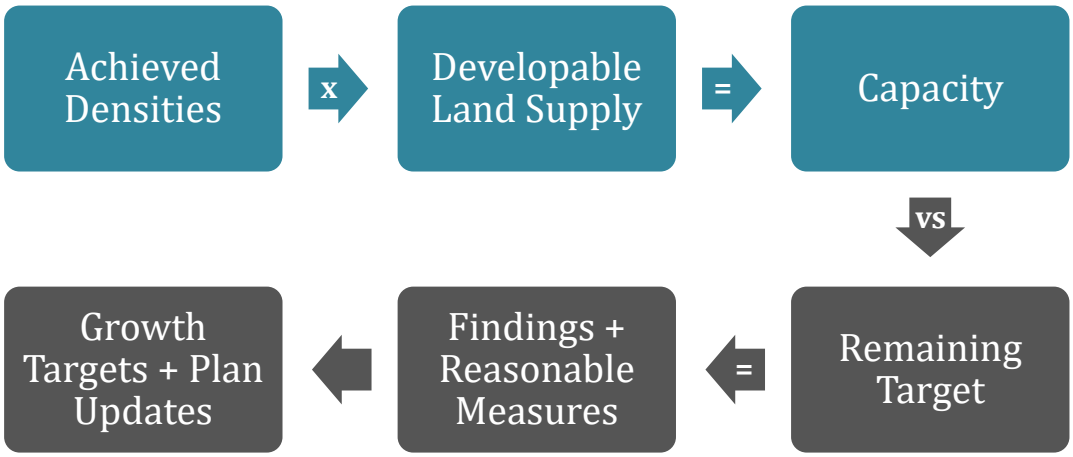
The findings included in this report are preliminary, and may be revised following public review. Complete findings on capacity, achievement of growth targets and densities, and reasonable measures will be contained in the final report.

# Ch. 3 Methodology and Guidance Overview

## Overview

This chapter provides an overview of the methodology used by King County and its cities to calculate urban growth capacity for residential and non-residential development. Exhibit 1 shows the three major steps in this process in blue, as well as three major steps following this process in grey. These steps highlight how capacity analysis results will be used to inform the development of potential reasonable measures, new growth targets for jurisdictions, and eventually comprehensive plan updates.

**Exhibit 1. Urban Growth Capacity Analysis Overview**




Source: Graphic adapted from King County Urban Growth Capacity Guidance, 2019.

This process for data collection to support urban growth capacity analysis was split into four phases:

- **Phase One** – Achieved Densities
- **Phase Two** – Land Supply
- **Phase Three** – Initial Capacity
- **Phase Four** – Final Capacity

Throughout the 2021 Urban Growth Capacity Report data development process, King County provided guidance documents to jurisdictions that walked through the analytical steps required in each phase,

and when relevant, provided data to support the analysis. Along with the guidance documents, jurisdictions were asked to fill out standardized data tables to support data aggregation as well as comparisons across different jurisdictions and Regional Geographies. The remainder of this chapter summarizes the process required of each jurisdiction throughout the phases of data collection and analysis. It also describes additional analyses King County and a consultant team developed to update and add rigor to data assumptions used in the analysis, or to develop new processes embedded in the data collection guidance. The individual guidance documents are attached to the end of this report in the Technical Appendices.

# Phase 1 - Achieved Densities

The goal of this phase was to calculate the achieved densities of new development that occurred between 2012 and 2018. For residential development, density is typically measured in dwelling units per acre. For non-residential development, density is typically measured as floor-area ratio, or the amount of building floor area divided by the total parcel area. Achieved densities form the basis for determining the assumed density of future development in urban growth capacity calculations. That process is described in more detail in Phase 3.

During Phase 1, King County jurisdictions collected the necessary data to calculate achieved density for each zone where development occurred during the six-year review and evaluation period of 2012 to 2018. An initial parcel-based analysis by King County was supplied to the jurisdictions to streamline reporting on achieved densities, which was then supplemented by jurisdiction-led analysis. The portions of reporting are:

1. Reviewing and supplementing a parcel-based analysis of new residential development, and
2. Reporting on additional development permitted during the review period, particularly non-residential and mixed-use development.

The parcel-based analysis was the starting place for residential data collection in the Urban Growth Capacity Study. It was designed to replace the majority of plat and permit reporting by identifying new residential development on parcels that changed boundaries or added residential units during 2012-2018. Permit reporting on single family and multifamily/mixed-use development was still necessary for residential developments not identified in the parcel-based analysis data, and to review or supplement the parcel-based analysis with project data (for example, non-buildable critical areas area). New non-residential development was designed to be addressed through permit reporting.

Using the parcel-based analysis supplemented by permit data, jurisdictions filled out several data templates provided by King County to support the calculation of achieved densities in residential, non-residential, and mixed-use zones. For details see Appendix A: Guide for Local Government Reporting Template PART 1.

# Phase 2 - Land Supply

The goal of Phase 2 was for jurisdictions to identify vacant and redevelopable land that has potential to see new development activity over the next 20 years. To quantify the developable land supply, jurisdictions followed the steps below. Results of this analysis were documented in standard data templates provided by King County.

- Assemble data, including parcel/assessor data, critical areas, and zoning (a set of 2019 parcel data and assessment information was provided to jurisdictions),
- Exclude land uses or parcels that are unlikely to develop for categorical reasons (e.g., parks, schools, public facilities, other institutions),
- Identify planned density by zone (see discussion below),
- Define thresholds for identifying vacant and redevelopable parcels (see discussion below),
- Identify vacant and redevelopable parcels using thresholds,
- Review and refine the resulting developable land supply,
- Remove area for environmentally sensitive lands (critical areas)
- Screen for infrastructure gaps, and
- Summarize developable land supply by zone.

## Planned Density Reporting

Planned density typically refers to the maximum density allowed by zoning code and development regulations. Planned densities were collected for two reasons. First, as a part of new requirements to the Growth Management Act (GMA) buildable lands statute passed by the State Legislature in 2017, King County jurisdictions are required to evaluate whether planned densities are being achieved in the 2020 Urban Growth Capacity Study. Achieved densities (evaluated in Phase One reporting) are later compared to planned densities as one indicator of whether development is occurring as planned.

Second, planned densities are used in the identification of redevelopable lands. These are lands that have some development already, but which could reasonably be expected to see additional development during the planning period. Redevelopable parcels include **partially utilized** parcels, meaning the parcel is large enough to be subdivided to allow for the creation of additional residential lots. They can also include **under-utilized** parcels, which are parcels that could be converted to a more intensive use typically because the planned density is significantly higher than the existing density on the parcels. Since the 2007 Buildable Lands Report, King County has recommended jurisdictions identify both kinds of redevelopable lands by comparing the existing density of development to its planned, or potential, density (see additional discussion below).

Typically, planned densities for residential zones are reported in dwelling units per acre (du/acre), and in floor area ratio (FAR) for non-residential zones. In certain cases, residential planned density is reported in terms of FAR or minimum lot size. Non-residential planned density has more variation and is less frequently defined as explicitly as residential zones. For these zones, jurisdictions were asked to fill out an FAR calculator to assist with consistent comparisons later in the study.

# Developable Land Supply Reporting

This portion of the analysis involved a jurisdiction-wide scan to quantify all land available for residential or commercial/industrial development for the next 20-year planning period. "Land supply" is the phrase used to refer to an inventory of land "suitable for development." Land supply inventories for each jurisdiction ideally strive for a snapshot of land with development potential as of January 2019, approximating the end of the most recent evaluation period (2012-2018). The land supply is comprised of both vacant and redevelopable lands and is typically based on a parcel-based dataset provided by King County. In certain cases, individual jurisdictions maintain a land supply based on development site data in lieu of parcel data.

## Vacant Definition

Vacant lands are devoid of development or contain only low value accessory structures. For this study, a recommended two-part test was used to determine if a parcel was vacant: query parcels with assessor present use codes indicating vacant land use *and* query parcels with improvement values less than $10,000. Selected parcels were then screened for known exclusions, such as school district land, parking lots associated with condo buildings, government-owned land, and other land use types (see Appendix).

## Redevelopable Definition (Residential)

For redevelopable residential land, a ratio of potential to existing density on a parcel was used to determine if a parcel was redevelopable. For example, if a city defined redevelopable land to be where existing development is less than two times the potential density for that property, then a single family property on an acre lot which is zoned for up to four units per acre, would be considered redevelopable.

Jurisdictions were recommended to choose a threshold between 2 to 3.5. The threshold a jurisdiction selected was influenced by development pressure and existing density, i.e., a lower threshold is more appropriate for denser, rapidly developing jurisdictions.

King County provided calculated residential density by parcel for this phase, and combined with planned density, jurisdictions were able to calculate the above ratio and test various thresholds. Once a given threshold was selected, results were queried and then screened through a variety of factors (for details see Appendix B: Phase 2 Guidance).

## Redevelopable Definition (Non-Residential and Mixed-Use)

Two methods were provided to jurisdictions for identifying redevelopable non-residential and mixed-use parcels. While a density-based ratio, as is recommended for residential lands, can be informative in some areas, particularly those facing significant development pressure, an improvement-to-land-value based ratio may also accurately identify properties likely to redevelop.

**Value-ratio method.** In the parcel/assessor data table provided by King County, an improvement-to-land-value ratio was calculated for each parcel (appraised improvement value divided by land value). A low ratio indicates more potential for redevelopment. Theoretically, the ratio reflects the potential profitability of more intensive use of a site relative to the revenue generating potential of the existing use. Typical threshold ratios for determining redevelopability range from 0.25 to 1. A threshold of 0.5 was recommended for most areas within the county. Jurisdictions experiencing more intense development pressure were allowed to consider a higher ratio.

**Density-ratio method**. Since planned densities for all zones were being evaluated for this analysis, using a density-based filter is more possible than in past studies. The existing FAR-based density was calculated and included in the parcel data. Similar to the residential redevelopability, this value was related to the planned FAR calculated for each zone to create a ratio of potential-to-existing density. Starting with a ratio of 1.5 (potential-to-existing density) and testing a +/-0.5 tolerance was the recommended starting place for reviewing the redevelopable land supply results. Jurisdictions with less non-residential development pressure were advised to set a higher threshold.

## Screening

Regardless of method, queried parcels were screened and selectively removed from the analysis. Full documentation on the screening process can be found in Appendix B: Phase 2 Guidance. Two major factors in reducing land supply, critical areas and infrastructure gaps, bear additional description.

### Critical Areas

Using the initial land supply, jurisdictions intersected and removed critical areas and critical area buffers in accordance with development standards, as described in Appendix B.

### Infrastructure Gaps

Comporting with the new Department of Commerce Buildable Lands Guidance, the land supply was screened to remove or discount land supply experiencing significant water, sewer, stormwater, or transportation infrastructure gaps that would fully or partially impede development at planned levels. Jurisdictions were provided with a summary of infrastructure constraints identified in their comprehensive plan, and then performed a two step analysis to further identify infrastructure constrained development: first identifying any areas with development potential outside existing service areas or affected by a significant, but unscheduled infrastructure need, and secondly removing or discounting specific parcels that were unserved and unlikely to be serviced in the next 20 years due to these gaps. Further detail on the infrastructure gaps guidance is contained in Appendix G.

### Final Land Supply

After critical area deductions and infrastructure constrained lands were removed, each jurisdiction reported net vacant and net redevelopable land by zone. This is the final land supply.

## Major Planned Development – Pipeline

The last section of Phase 2 asked each jurisdiction to fill out permitted development already in the pipeline, and when possible, the corresponding parcel number. Pipeline development was considered separately in the capacity analysis, and this step was to ensure that parcels with permitted development were not double counted towards future capacity as well.

# Phases 3 and 4 – Capacity

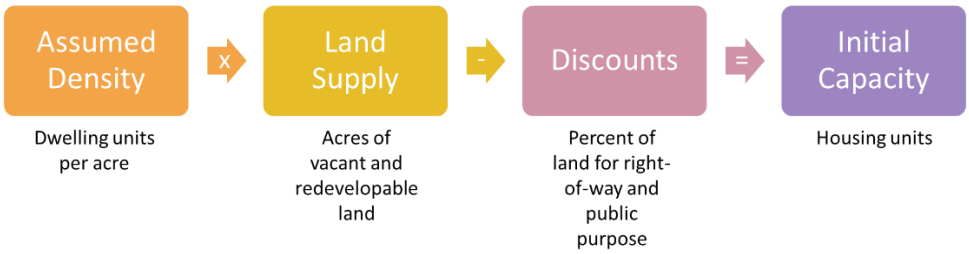
Calculating capacity was spread across two phases of data reporting. Phase 3 focused on an initial capacity calculation by zone, paired with local reporting on achieved growth and densities. Phase 4 data reporting finalized urban growth capacity calculations for each jurisdiction by applying market factor and employment density assumptions to the initial capacity calculated in Phase 3.

## Capacity Overview

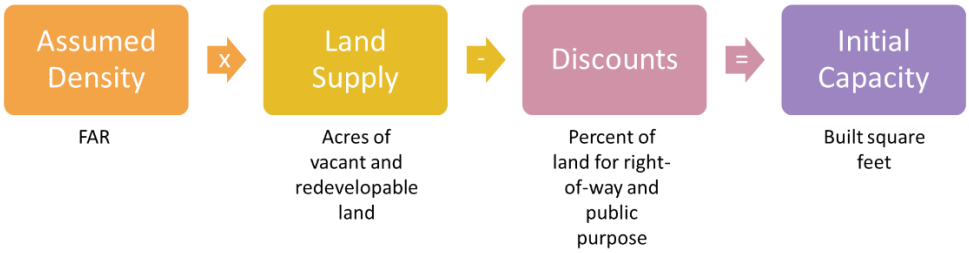
Generally, developable capacity is calculated by zone, and is the product of a zone's assumed density and the area of land supply, minus a percentage accounting for streets, sidewalks, and public purpose land. Achieved densities calculated in Phase 1 of data collection typically form the basis for the assumed densities, and the land supply was reported by zone in Phase 2. Jurisdictions selected discounts for right-of-way and public purpose lands, informed by recent development trends, to reduce the land supply for non-buildable, necessary infrastructure. This process is illustrated below in Exhibit 2.

**Exhibit 2. Capacity Calculation Steps**

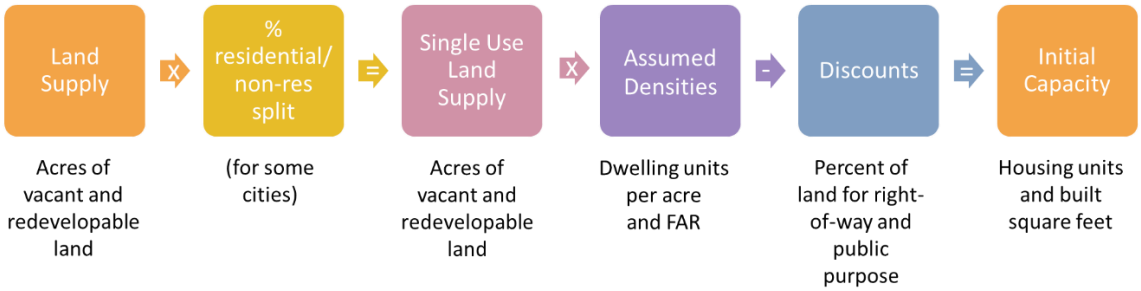
**Calculating Residential Capacity**




**Calculating Non-Residential Capacity**




**Calculating Mixed-use Capacity**




Source: King County Phase 3 Guidance Document, 2020.

# Calculating Capacity

The steps for calculating capacity are broken down in the following sections: reporting assumed density, determining mixed-use splits, taking discounts, and calculating capacity.

## Assumed Densities

Assumed densities are an important part of developing capacity calculations. They are reported for each zone where development can occur. Assumed densities, except in limited circumstances, must be based upon the achieved densities observed in the 2012-2018 evaluation period reported in Phase 1 of Urban Growth Capacity data collection. This is specifically called out in RCW 36.70A.215(3)a, e.

Deviation from achieved density is only permitted for zones in the following circumstances:

- **Insufficient observed development in the evaluation period**. Some zones may have experienced limited or no development to draw reasonable conclusions for anticipated development densities, either in the types of development allowed in a mixed-use zone, or in the quantity of development.
- **Changes in regulations**. Densities achieved in development permitted during the five-year review period may reflect zoning and development regulations that have since changed. Where regulations have changed to effectively increase or decrease achievable net densities, assumed future densities should reflect the impact of those regulatory changes, and the specific changes should be documented.
- **Trends over time**. A trend of increasing dwelling units per acre or FAR over time could justify an assumed future density higher than indicated in the zonal average reported as achieved density in Phase 1. Annual reporting in Phase 1 data would indicate this trend.
- **Infrastructure gaps.** "Partial infrastructure gaps," where infrastructure limitations affected portions of zones from achieving planned densities were identified in Phase 2 data reporting.

In such cases, jurisdictions may look to the planned density to inform the assumed density. Documentation of the specific development circumstances that demand deviation from the achieved density, and the rationale for the selected assumed density are required in the reporting tools.

Assumed densities are the basis for calculating initial capacity below.

## Mixed-Use Zone Splits

Mixed-use zones are defined as zones with capacity for both residential and non-residential development. In some cities, mixed-use zones require the achieved use splits observed in Phase 1 to apportion area to residential and non-residential uses to calculate capacity, but all cities were asked to report on differences between achieved density and planned density for mixed-use development.

Some mixed-use zones did not see development in the evaluation period. In these instances, jurisdictions were advised to draw from additional sources:

- Observed splits in zones in comparable zones in or outside of the given jurisdiction
- Expressed vision for these areas in comprehensive and neighborhood plan policies, or development regulations
- Local knowledge of market conditions, demand for space, projects in the development pipeline, and developer interest
- Existing development similar to that envisioned for a zone

Defining these splits is a key component in understanding the breakdown in land supply available to residential and non-residential development on mixed-use land.

## Discounts

To estimate the actual developable capacity, the area of vacant and redevelopable land supply must be reduced or "discounted" to account for land that gets utilized for rights-of-way and other public purpose uses where people do not live or work. Public purpose uses are generally stormwater facilities, parks, or other open space. These amounts vary by type and density of development. The starting place for approximating these discounts is the observed development data used to calculate achieved densities in Phase 1.

Past buildable lands reports provide additional reference points, built from the development observed during those evaluation periods. As development becomes denser and occurs as infill, these discount rates reduce, as right-of-way and public purpose uses are already built into the urban fabric.

Jurisdictions were encouraged to tailor discount selections to major land use types (e.g., multifamily, or non-residential development) and to vacant or redevelopable land. Some jurisdictions varied discounts by zone, based on future development conditions.

## Initial Capacity

In this step, capacity is calculated by combining all portions of the analysis up until this point. From here, capacity was calculated by the following steps:

1. Report land supply area by vacant/redevelopable and by zone.
2. Deduct the selected percentages for rights-of-way and public purpose, determining the actual buildable area.
3. Calculate initial capacity by multiplying assumed density by buildable area, resulting in either initial dwelling unit calculations for residential capacity, or square feet of developable floor area for non-residential capacity.
4. Subtract and existing units/development on redevelopable parcels in order to obtain the net capacity by zone.

It is important to note that in Phase 1 data collection, achieved densities were separately calculated for the residential and non-residential components of mixed-use projects. These achieved densities were generally calculated from the number of residential units or commercial/office square footage over the entire parcel area. Calculating density in this manner factors in a split between residential and non-residential uses into the achieved density, making a separate apportionment of mixed-use zoned land before the assumed density is applied unnecessary. Some jurisdictions preferred to apportion mixed use land to single uses to calculate achieved densities. For these jurisdictions, it was necessary to apply the achieved mixed-use land split to the land supply before applying their assumed densities.

## Final Capacity

Creating the final urban growth capacity calculations for each jurisdiction involves applying market factor and employment density assumptions to the general capacity calculation process outlined in Phase 3. This section describes those assumptions.

### Market Factor

Market Factor is the estimated percentage of developable land contained within an urban growth area that is likely to remain unavailable over the course of a 20-year planning period and is, in practice, the final non-developable land deduction when calculating lands suitable for development and redevelopment. Appendix E: Market Factor Guidance details considerations jurisdictions used when selecting appropriate assumptions to apply in each zone based on local market conditions or other factors.

### Employment Density

Estimating employment densities is the final step in estimating total capacity for new job growth in a jurisdiction. While there are various ways to convert land capacity to capacity for new employment, King County selected to use an approach that converts non-residential development capacity measured in square feet of floor area to capacity for new employment. This conversion requires assumptions for the average number of built square feet of floor area for each job. The lower the square foot per job, the higher the density of use. The calculation is simply:

***Total job capacity*** *= Gross square footage[1] of floor area capacity / gross square footage per job*

Square footage per job can vary widely by building type or employment sector. For example, warehouses devote a great deal of square footage to storing inventory or other goods, and therefore typically require considerably more square footage per job than office uses. Average employment density assumptions should reflect the types of job growth that are expected in an area.

Many jurisdictions selected different employment density assumptions for commercial and industrial zones to reflect different expectations for the type of development and job growth expected in those zones. Some jurisdictions even varied employment density assumptions among different commercial zones. For example, a city may assume that average square footage per job is lower in a downtown zone than in other commercial zones further from the core. This decision could reflect expectations that a higher proportion of the downtown floor area capacity will be used as office space, compared to other commercial zones where lower density retail uses may be more common.

Appendix F: Employment Density Guidance provides additional details about considerations jurisdictions could use when selecting the assumptions.

[1] Gross square footage simply refers to the total square footage of the building, including walls. Gross square footage capacity is calculated as the floor area ratio (FAR) * the parcel size in square feet.

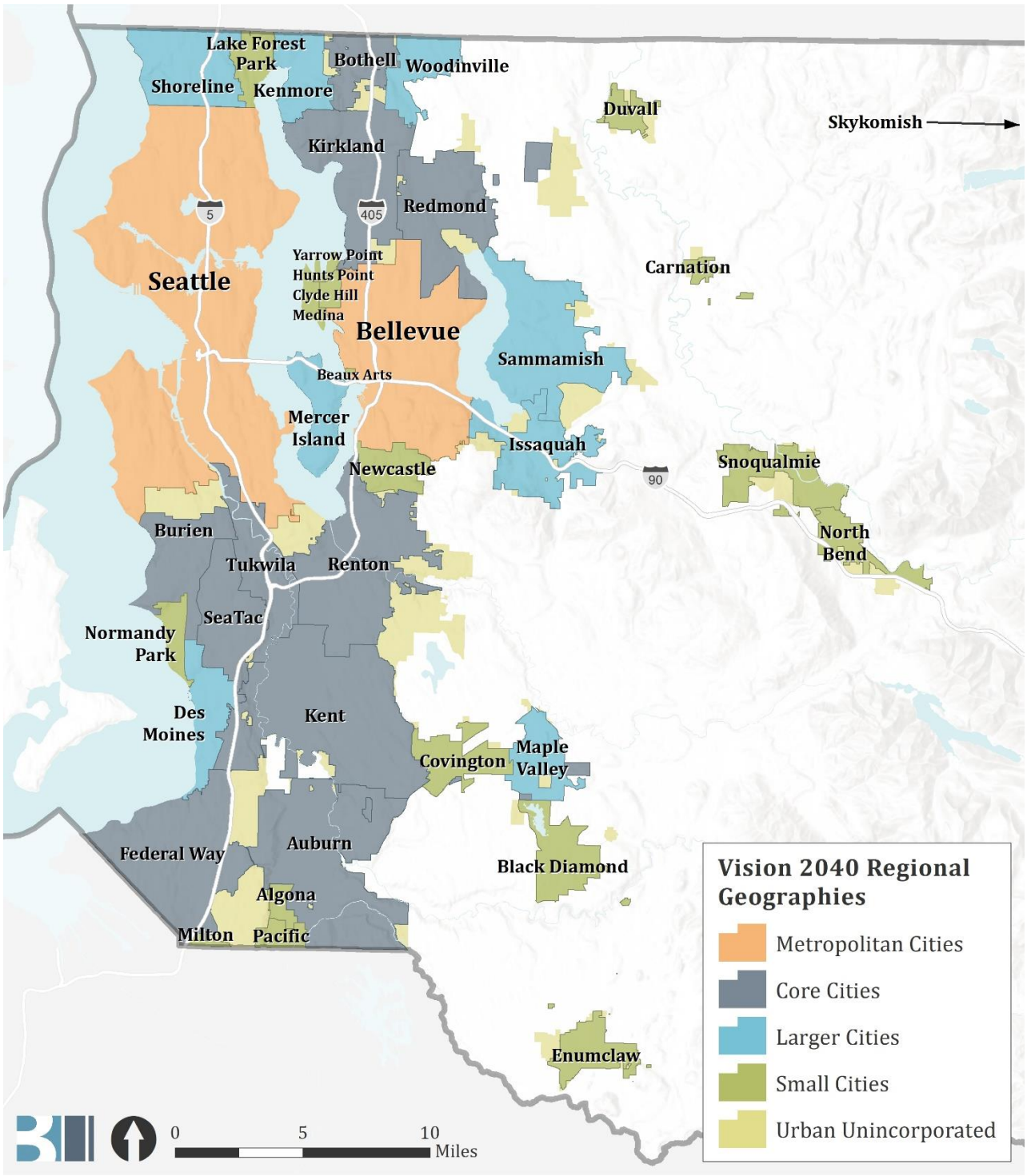
# Ch. 4 Development Trends

This chapter reviews residential and employment growth trends in King County between 2006 and 2018. It also compares these trends to growth targets set in the 2012 King County Countywide Planning Policies and subsequently extended to 2035.[2] These targets include growth for the Urban Growth Area as a whole, individual jurisdictions, and a set of five Regional Geographies for grouping individual jurisdictions: Metropolitan Cities, Core Cities, Larger Cities, Small Cities, and Urban Unincorporated areas (for a map, see Exhibit 3).

Regional Geographies used in this chapter are based on Puget Sound Regional Council's VISON 2040 regional plan, as the 2006-2035 targets were adopted using the VISION 2040 plan as a framework. They should not be confused with the new VISION 2050 Regional Geographies King County adopted in 2020. Chapter 6 will use the new Regional Geographies to summarize capacity with an eye towards planning for new 2019-2044 growth targets.

[2] King County extended the 2006-2031 growth targets out to 2035 using a linear projection based on continuing the same average annual growth rate. These 2035 targets may vary from land use assumptions used in local comprehensive plans for jurisdictions that selected a different method for extending their 2031 growth targets to 2035.

**Exhibit 3. Map of VISION 2040 Regional Geographies Used for 2035 Growth Targets**

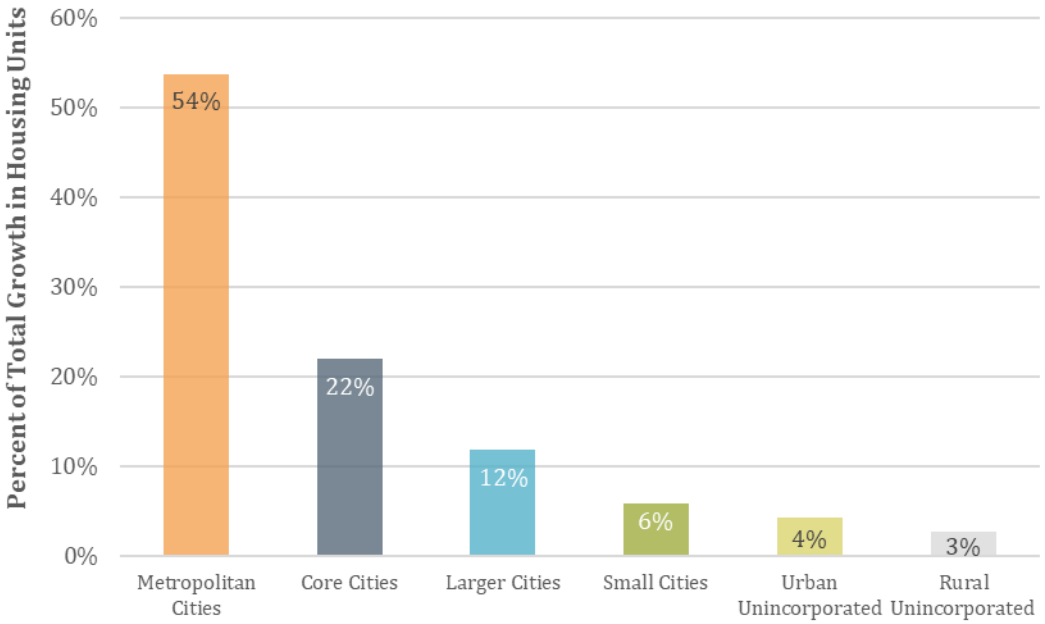



Source: PSRC VISION 2040; BERK, 2021.

# Residential Growth Trends

Between 2006 and 2018, the county had a net gain of 415,591 new residents and 130,892 new housing units. The average annual rate of net new housing production was 1.4%. Exhibit 4 shows net new housing with break downs by Regional Geography. Over half of all new housing units were constructed in Metropolitan Cities, with the vast majority in the City of Seattle. During this period only 3% of all housing production was in rural unincorporated areas.

**Exhibit 4. Net New Housing Units by Regional Geography, 2006-2018**



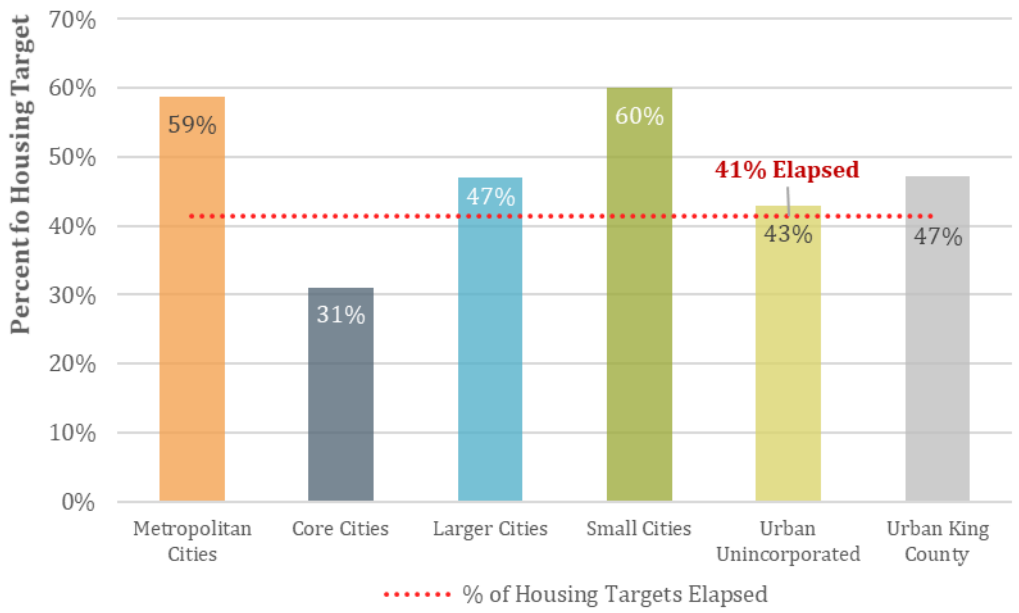

Source: King County, 2021, based on Washington State Office of Financial Management (OFM) Small Area Estimates[3].

## Consistency of Residential Growth with Adopted Targets

As a whole, King County is on pace to meet the 2035 countywide growth target of 276,604 net new units. Exhibit 5 shows progress toward the 2035 housing growth targets. As of 2018, King County was 47% of the way to achieving the 2035 target, compared to 41% of the growth period having elapsed (12 out of 29 years). The exhibit shows that progress by Regional Geography has varied. Collectively, Metropolitan Cities, Larger Cities, and Small Cities have all growth at a faster pace than needed to achieve their targets in 2035. On the other hand, Core Cities have grown more slowly than needed to achieve their 2035 targets.

[3] All 2006 and 2018 city and urban unincorporated area estimates in this chapter are sourced from block-level data from the WA Office of Financial Management (OFM) Small Area Estimates Program. This source was used to develop jurisdictional estimates for both years that reflect approximate current municipal boundaries to control for growth due to annexation. Some variation from OFM official April 1st population estimates for jurisdictions will be evident.

**Exhibit 5. Progress Towards 2035 Housing Targets, 2006-2018**




Source: King County, 2021, based on OFM Small Area Estimates.

Exhibit 6 compares housing growth to targets for each jurisdiction. The column with colored cells (% of 2035 Target Pace) measures the progress of each city and urban unincorporated King County compared to the pace needed to achieve their 2035 target. A value of 100% indicates the jurisdiction was growing at exactly the right rate to meet their 2035 target, while lower values indicate the jurisdiction was growing at a slower rate than implied in the growth target. For jurisdictions growing slower than the target pace, the color of the cell indicates how close the pace of growth is to target. Jurisdictions very close to the target pace are shown in green, while those further from the pace are in yellow, orange, or red. The number of jurisdictions that grew significantly slower than the target pace are relatively few. Cities that have significantly over paced their target rate were generally affected by having very small residential targets. Note that data for cities that straddle two counties include only the King County portion.

## Exhibit 6. Residential Growth Compared to Targets, 2006-2018

| City/Jurisdiction | 2006 Total Housing Units | 2006-2035 Housing Target | 2006-2018 Housing Production | 2018 Total Housing Units | % of 2035 HU target pace | Remaining 2035 Target | Annual Growth Needed to Achieve Target |
|---|---|---|---|---|---|---|---|
| **Metropolitan Cities** | | | | | | | |
| Bellevue | 55,107 | 20,056 | 6,591 | 61,698 | 79% | 13,465 | 1.3% |
| Seattle | 292,881 | 99,760 | 63,675 | 356,556 | 154% | 36,085 | 0.6% |
| **Subtotal** | **347,988** | **119,816** | **70,266** | **418,254** | **142%** | **49,550** | **0.7%** |
| **Core Cities** | | | | | | | |
| Auburn | 23,602 | 11,159 | 3,138 | 26,740 | 68% | 8,021 | 1.8% |
| Bothell | 9,522 | 4,420 | 2,204 | 11,726 | 121% | 2,216 | 1.1% |
| Burien | 19,584 | 5,150 | 1,225 | 20,809 | 57% | 3,926 | 1.1% |
| Federal Way | 34,560 | 9,396 | 2,525 | 37,085 | 65% | 6,871 | 1.1% |
| Kent | 43,552 | 10,753 | 4,259 | 47,811 | 96% | 6,495 | 0.8% |
| Kirkland | 35,556 | 9,941 | 3,100 | 38,656 | 75% | 6,841 | 1.0% |
| Redmond | 22,790 | 11,896 | 4,946 | 27,736 | 100% | 6,950 | 1.5% |
| Renton | 36,168 | 17,231 | 6,607 | 42,775 | 93% | 10,623 | 1.5% |
| SeaTac | 10,301 | 6,728 | 548 | 10,849 | 20% | 6,180 | 3.4% |
| Tukwila | 7,739 | 5,626 | 130 | 7,869 | 6% | 5,496 | 4.1% |
| **Subtotal** | **243,374** | **92,300** | **28,683** | **272,057** | **75%** | **63,617** | **1.4%** |
| **Larger Cities** | | | | | | | |
| Des Moines | 12,287 | 3,480 | 413 | 12,700 | 29% | 3,067 | 1.4% |
| Issaquah | 11,517 | 6,670 | 5,096 | 16,612 | 185% | 1,574 | 0.6% |
| Kenmore | 8,156 | 4,060 | 1,120 | 9,276 | 67% | 2,940 | 1.9% |
| Maple Valley | 6,765 | 2,088 | 2,061 | 8,826 | 239% | 27 | 0.0% |
| Mercer Island | 9,467 | 2,320 | 1,006 | 10,473 | 105% | 1,314 | 0.7% |
| Sammamish | 18,196 | 4,849 | 3,585 | 21,780 | 179% | 1,264 | 0.3% |
| Shoreline | 22,173 | 5,800 | 1,529 | 23,702 | 64% | 4,271 | 1.1% |
| Woodinville | 4,550 | 3,480 | 604 | 5,154 | 42% | 2,876 | 3.3% |
| **Subtotal** | **93,110** | **32,747** | **15,413** | **108,523** | **114%** | **17,334** | **0.9%** |
| **Small Cities** | | | | | | | |
| Algona | 960 | 220 | 89 | 1,049 | 97% | 132 | 0.7% |
| Beaux Arts Village | 119 | 3 | 1 | 120 | 82% | 2 | 0.1% |
| Black Diamond | 1,623 | 2,204 | 112 | 1,735 | 12% | 2,092 | 7.1% |
| Carnation | 739 | 383 | 141 | 880 | 89% | 242 | 1.6% |
| Clyde Hill | 1,083 | 12 | 8 | 1,091 | 176% | 3 | 0.0% |
| Covington | 5,470 | 1,705 | 1,564 | 7,034 | 222% | 141 | 0.1% |
| Duvall | 2,105 | 1,322 | 576 | 2,681 | 105% | 746 | 1.6% |
| Enumclaw | 5,048 | 1,653 | 278 | 5,326 | 41% | 1,375 | 1.5% |
| Hunts Point | 183 | 1 | 4 | 187 | 888% | - | Met Target |
| Lake Forest Park | 5,226 | 551 | 201 | 5,427 | 88% | 350 | 0.4% |
| Medina | 1,162 | 22 | 72 | 1,234 | 795% | - | Met Target |
| Milton | 337 | 58 | 271 | 608 | 1129% | - | Met Target |
| Newcastle | 3,784 | 1,392 | 1,404 | 5,188 | 244% | - | Met Target |
| Normandy Park | 2,794 | 139 | 83 | 2,877 | 144% | 56 | 0.1% |
| North Bend | 3,352 | 771 | 361 | 3,712 | 113% | 411 | 0.7% |
| Pacific | 2,146 | 331 | 316 | 2,462 | 231% | 15 | 0.0% |
| Skykomish | 166 | 12 | 7 | 173 | 144% | 5 | 0.2% |
| Snoqualmie | 2,864 | 1,873 | 2,087 | 4,951 | 269% | - | Met Target |
| Yarrow Point | 401 | 16 | 25 | 426 | 375% | - | Met Target |
| **Subtotal** | **39,560** | **12,670** | **7,601** | **47,160** | **145%** | **5,069** | **0.6%** |
| **Urban Unincoporated** | | | | | | | |
| Urban Unincorporated | 35,910 | 12,837 | 5,498 | 41,408 | 104% | 7,339 | 1.0% |
| **Subtotal** | **35,910** | **12,837** | **5,498** | **41,408** | **104%** | **7,339** | **1.0%** |
| **Urban King County** | **759,942** | **270,370** | **127,461** | **887,403** | **114%** | **142,909** | **0.9%** |

Source: King County, 2021, based on OFM Small Area Estimates.

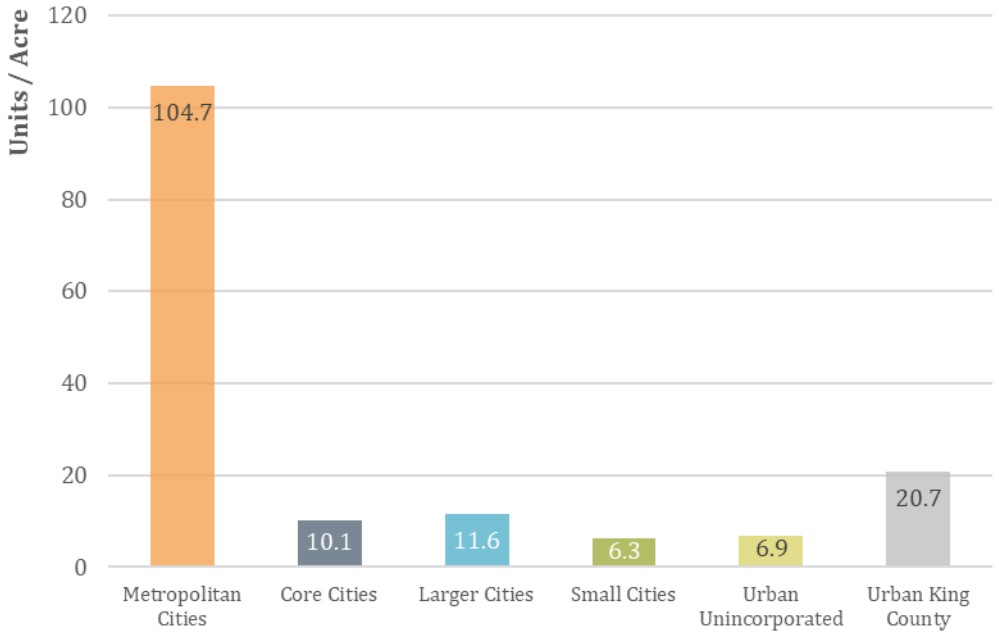
Percent of Target Pace

0% — 100% +

## Achieved Residential Density

This section evaluates achieved density in dwelling units per acre for residential construction that was permitted between 2012 and 2018. Achieved density varied significantly between Regional Geographies, as shown in Exhibit 7. Metropolitan Cities permitted housing at ~105 du/acre on average, while in the remainder of the county average density ranged between 6 and 12 units per acre.

**Exhibit 7. Average Achieved Density of Permitted Housing Units, 2012-2018**




Source: BERK, 2021, based on permit data summarized by King County jurisdictions.

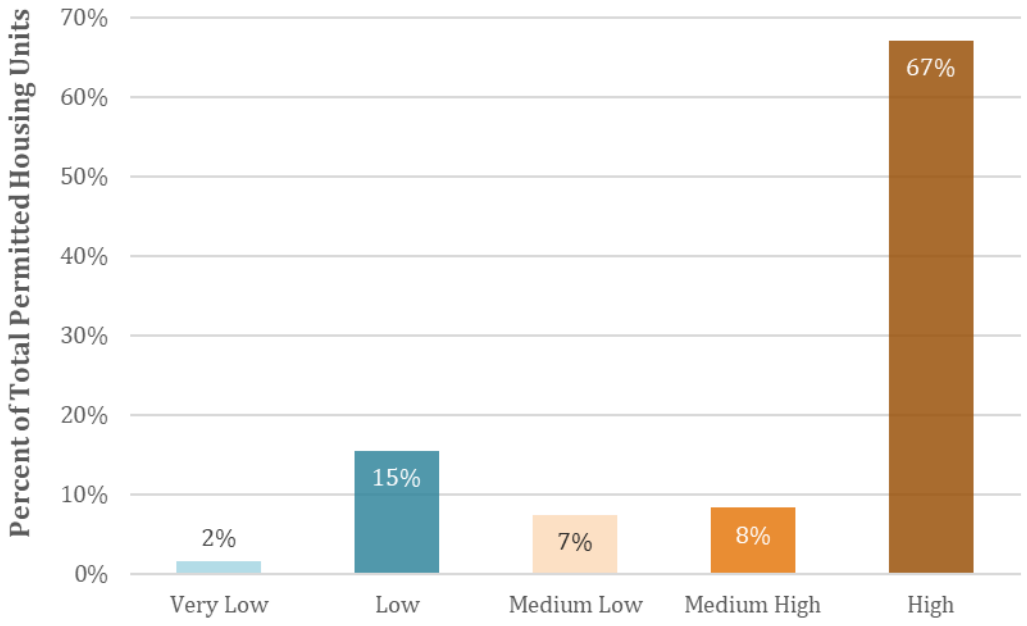
The following exhibits summarize achieved density in five density categories, shown in Exhibit 8..

**Exhibit 8. Categories for Summarizing Achieved Residential Density (Dwelling units per Acre)**

| Very Low | Low | Medium-Low | Medium-High | High |
|---|---|---|---|---|
| **Less than 4** | **4 - 10** | **10 – 24** | **24 – 48** | **Greater than 48** |

Over two-thirds of all newly permitted housing units were in the High density development classification, with densities greater than 48 units per acre, as shown in Exhibit 9. Housing in this category would almost exclusively be in multifamily buildings such as apartments or condominiums. About 17% of all housing development was in the Low or Very Low categories, indicating single-family housing built at 10 units per acre or less. Only 15% of all housing production was built at Medium densities between 10 and 48 units per acre. Residences in these categories could include "missing middle" formats such as small lot single family, multiplexes, townhomes, and some low-rise apartments or condominiums.

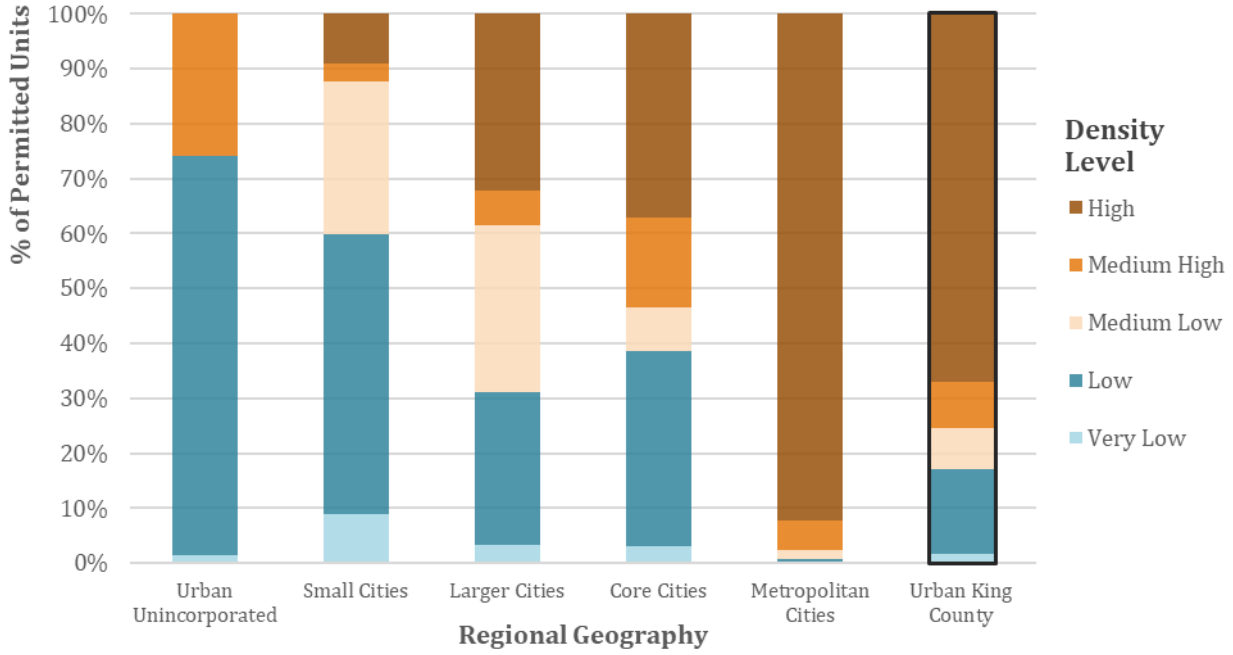
**Exhibit 9. Countywide Permitted Housing Units by Achieved Density, 2012-2018**




Source: BERK, 2021, based on permit data summarized by King County jurisdictions.

Exhibit 10 shows the distribution of achieved density for each Regional Geography. Over 90% of permitted units in Metropolitan Cities were in the High density housing range. High density housing also accounted for between 30% and 40% of permitted units in Core Cities and Larger Cities, both of which included a diversity of different density levels. In Urban Unincorporated and Small Cities, Low and Very Low density development was most common.

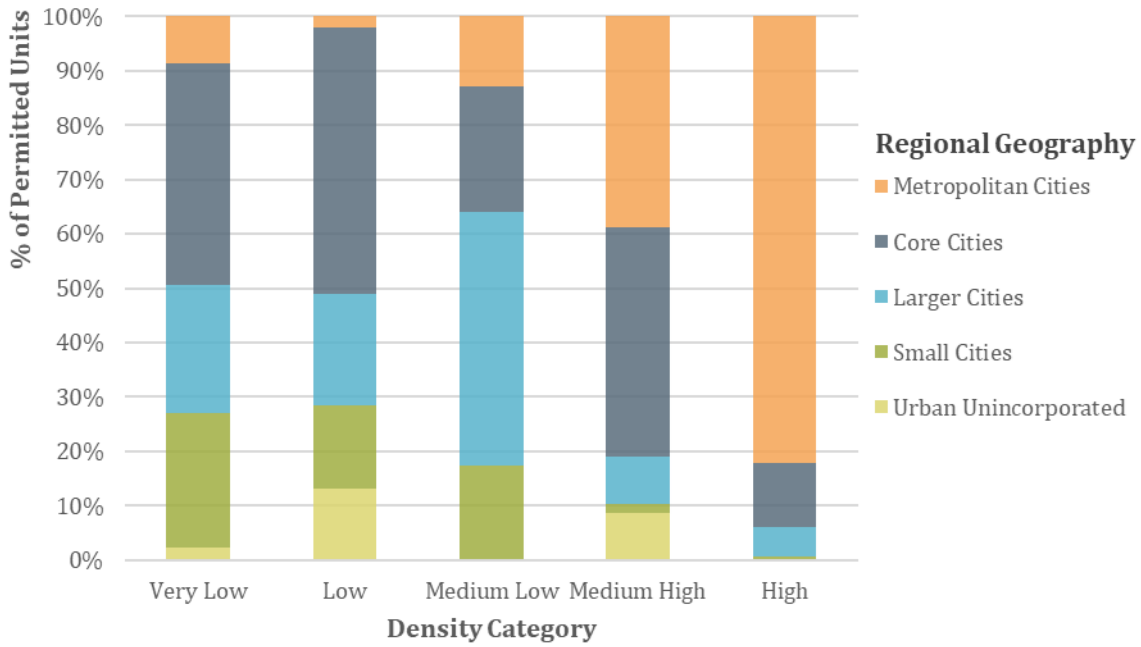
**Exhibit 10. Permitted Housing Units by Regional Geography and Achieved Density, 2012-2018**




Source: BERK, 2021, based on permit data summarized by King County jurisdictions.

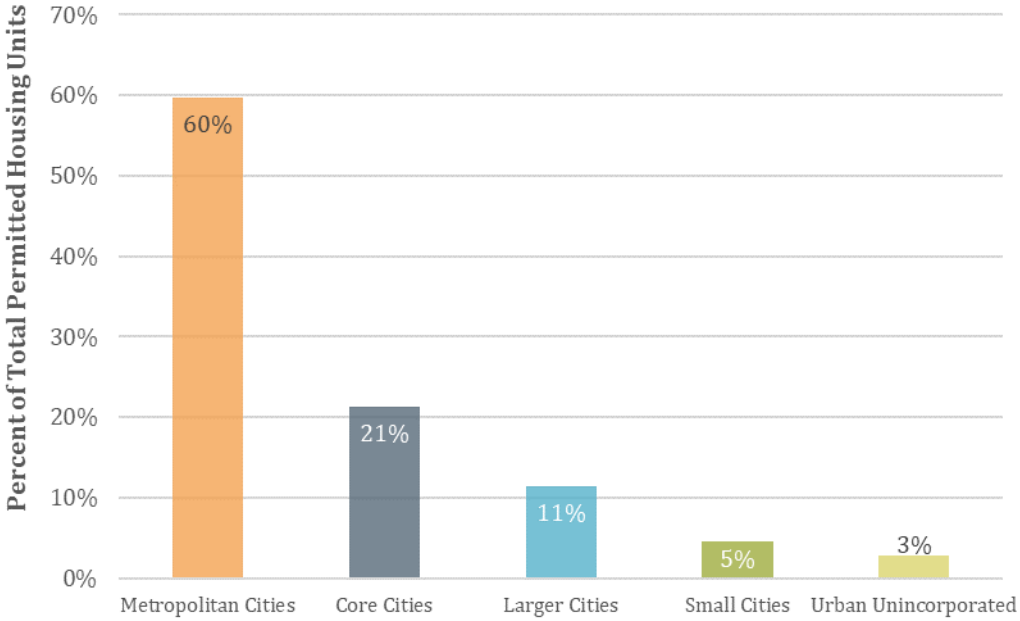
Exhibit 11 presents the same permit data transposed to show the distribution by Regional Geography for each achieved density level. Not surprisingly, the vast majority of the High density growth occurred in Metropolitan Cities. Most of the Medium-High density growth was split between Metropolitan Cities and Core Cities. About 70% of both Low and Medium-Low density growth occurred in Core Cities and Larger Cities.

**Exhibit 11. Permitted Housing Units by Achieved Density and Regional Geography, 2012-2018**




Source: BERK, 2021, based on permit data summarized by King County jurisdictions.

**Exhibit 12. Permitted Housing Units by Regional Geography, 2006-2018**

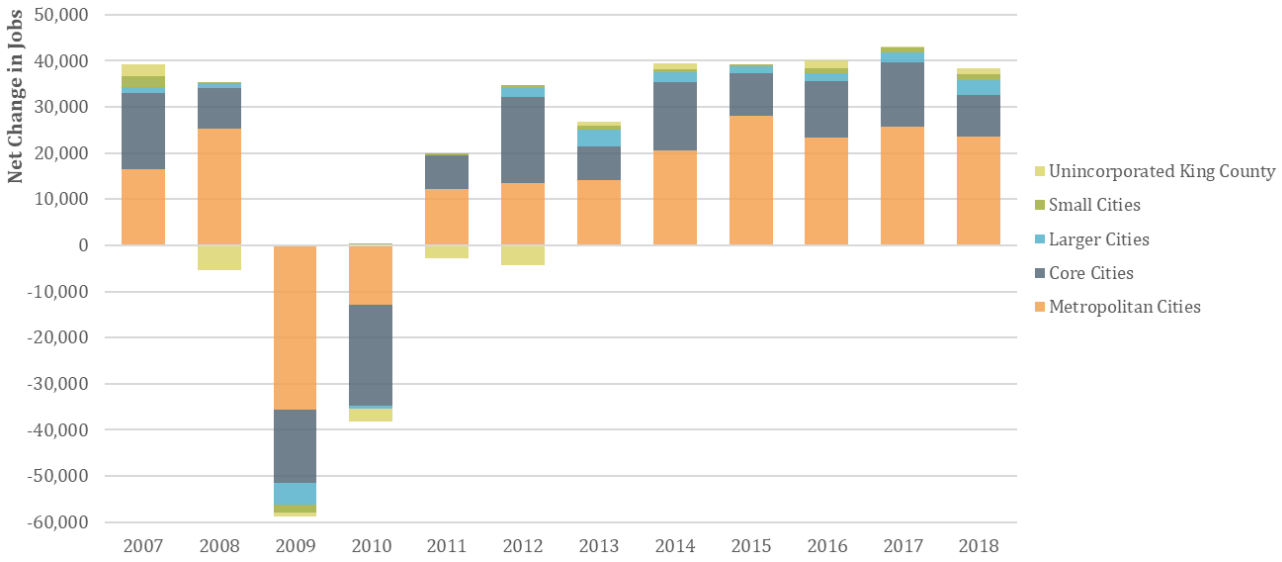



Source: BERK, 2021, based on permit data summarized by King County jurisdictions.

# Employment Growth Trends

Between 2006 and 2018, the county had a net gain of 246,475 new jobs. The average annual rate of job growth was 1.8%. Exhibit 13 shows annual gain or loss of jobs by Regional Geography. It shows significant job losses during Great Recession in 2009 and 2010. It also shows smaller losses of jobs in Unincorporated King County in 2008, 2011, and 2012. These are likely due to annexations of unincorporated areas into cities, which would represent a shift of jobs from one Regional Geography category to another rather than actual job losses. With regards to job growth, these trends show annual gains highly concentrated in Metropolitan and Core Cities.

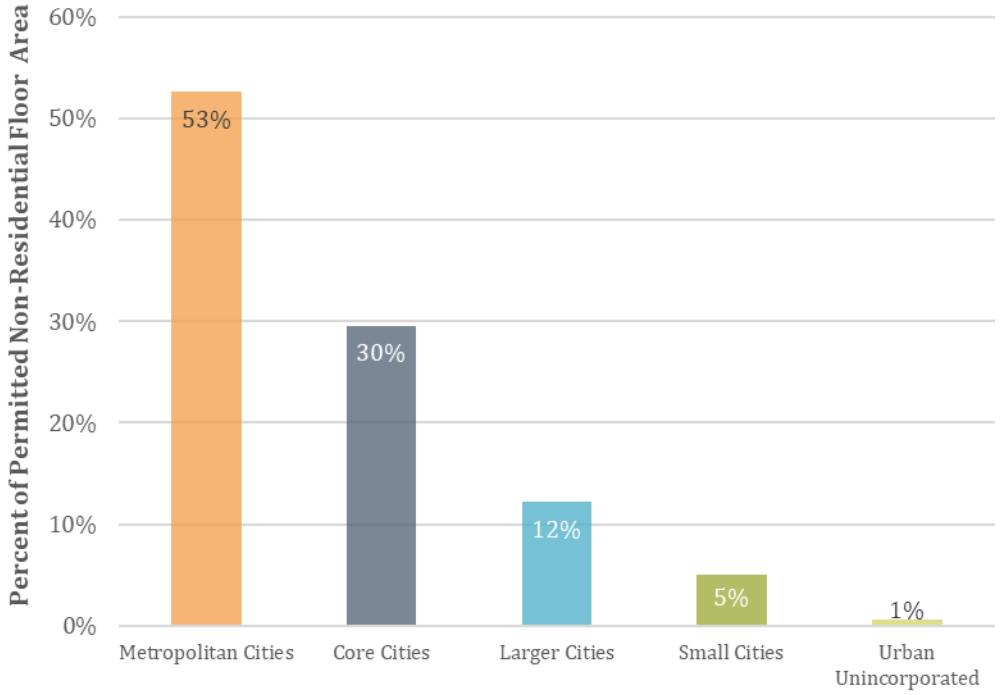
**Exhibit 13: Annual Net Change in Jobs by Regional Geography, 2007-2018**




Source: PSRC, 2020.

Exhibit 14 breaks down all non-residential development permitted in urban King County by Regional Geography. Over half of this growth was within Metropolitan Cities, and nearly a third was in Core Cities. The other geographies had much smaller shares.

**Exhibit 14. Permitted Non-Residential Floor Area by Regional Geography, 2012-2018**

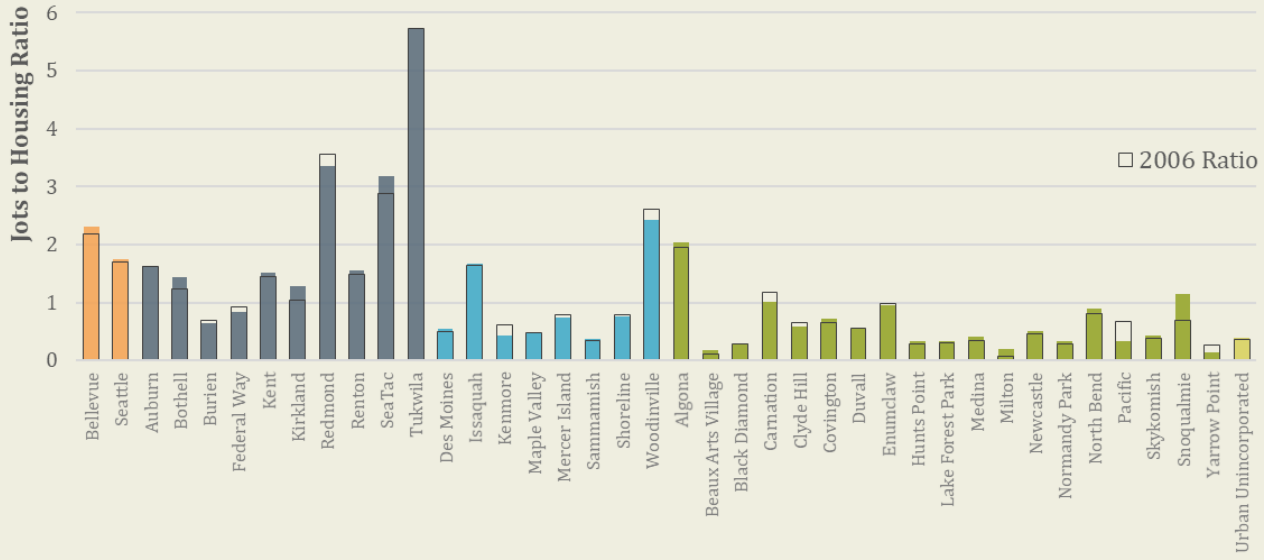



Source: BERK, 2021, based on permit data summarized by King County jurisdictions.

### Jobs Housing Balance

The chart below shows the ratio of jobs to housing units for each Regional Geography. Metropolitan Cities and Core Cities are significantly higher than other geographies, reflecting their roles containing King County's primary employment centers. The following exhibit shows the same ratio calculated for each individual jurisdiction. There is significant variation, with Tukwila, SeaTac, and Redmond each standing out with relatively high ratios.

**Exhibit 15. Jobs to Housing Ratio by Jurisdiction (2018 vs 2006)**

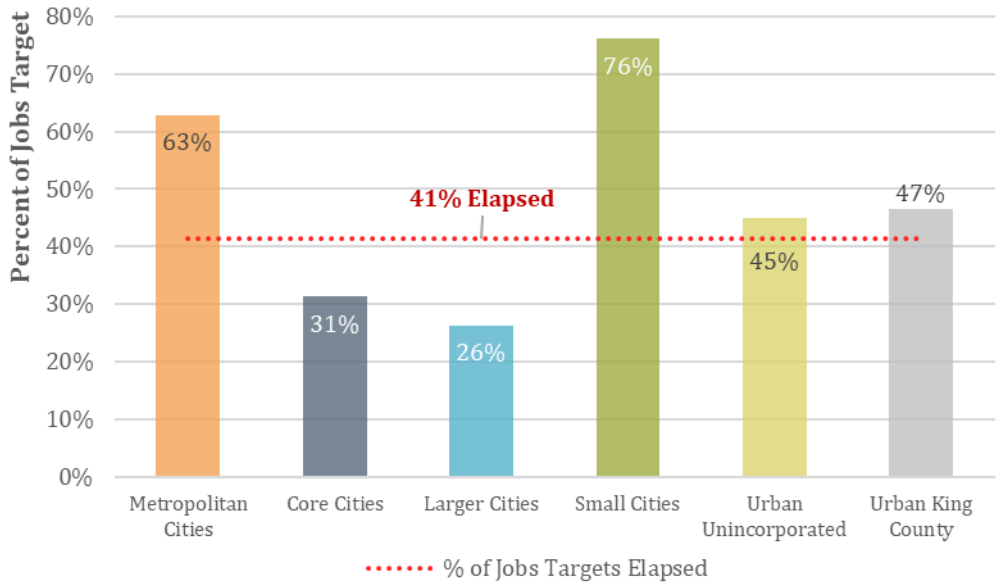



Source: PSRC, 2020; OFM, 2020.

## Consistency of Employment Growth with Adopted Targets

As a whole, urban King County is on pace to hit the 2035 countywide growth target of 488,659 net new jobs. Exhibit 16 shows progress toward the 2035 job growth targets. As of 2018, King County was 47% of the way to achieving the 2035 target, compared to 41% of the growth period having elapsed (12 out of 29 years). The exhibit shows that progress by Regional Geography has varied. As a category, both Metropolitan Cities and Small Cities have grown at a faster pace than needed to achieve their targets in 2035. On the other hand, Core Cities and Large Cities have grown more slowly than needed to achieve their 2035 targets.

**Exhibit 16. Progress Toward 2035 Jobs Target by Regional Geography, 2006-2018**




Source: King County, 2021; PSRC, 2020.

Exhibit 17 compares job growth to targets for each jurisdiction. The column with colored cells (% of Jobs Target Pace) measures the progress of each city and unincorporated urban King County compared to the pace needed to achieve their 2035 target. A value of 100% indicates the jurisdiction was growing at exactly the right rate to hit their 2035 target while lower values indicate the jurisdiction was growing at a slower rate than implied in the growth target. For jurisdictions growing slower than the target pace, the color of the cell indicates how close the pace of growth is to target. Jurisdictions close to the target pace are shown in green, while those further from the pace are in yellow, orange, or red.

## Exhibit 17. Employment Growth Compared to Targets, 2006-2018

| City | 2006 Total Jobs | 2006-2035 Jobs Target | 2006-2018 Jobs Growth | 2018 Total Jobs | % of Jobs Target Pace | Remaining 2035 Target | Annual Growth to Achieve 2035 Target |
|---|---|---|---|---|---|---|---|
| **Metropolitan Cities** | | | | | | | |
| Bellevue | 120,494 | 61,480 | 22,529 | 143,023 | 89% | 38,951 | 1.6% |
| Seattle | 498,931 | 170,172 | 123,190 | 622,121 | 175% | 46,982 | 0.4% |
| **Subtotal** | **619,425** | **231,652** | **145,719** | **765,144** | **152%** | **85,933** | **0.7%** |
| **Core Cities** | | | | | | | |
| Auburn | 38,252 | 22,446 | 5,518 | 43,770 | 59% | 16,928 | 2.3% |
| Bothell | 11,757 | 5,800 | 5,023 | 16,780 | 209% | 777 | 0.3% |
| Burien | 13,371 | 5,754 | (26) | 13,345 | -1% | 5,780 | 2.5% |
| Federal Way | 31,616 | 14,268 | (468) | 31,148 | -8% | 14,736 | 2.8% |
| Kent | 63,299 | 15,405 | 9,061 | 72,360 | 142% | 6,344 | 0.5% |
| Kirkland | 36,698 | 24,186 | 12,582 | 49,280 | 126% | 11,604 | 1.4% |
| Redmond | 81,207 | 26,680 | 11,967 | 93,174 | 108% | 14,713 | 0.9% |
| Renton | 53,431 | 33,640 | 12,720 | 66,151 | 91% | 20,920 | 1.9% |
| SeaTac | 29,585 | 29,348 | 4,937 | 34,522 | 41% | 24,411 | 4.2% |
| Tukwila | 44,345 | 20,358 | 621 | 44,966 | 7% | 19,737 | 2.6% |
| **Subtotal** | **403,561** | **197,884** | **61,935** | **465,496** | **76%** | **135,949** | **1.7%** |
| **Large Cities** | | | | | | | |
| Des Moines | 6,206 | 5,800 | 859 | 7,065 | 36% | 4,941 | 4.1% |
| Issaquah | 18,889 | 23,200 | 8,950 | 27,839 | 93% | 14,250 | 3.0% |
| Kenmore | 5,062 | 3,480 | (1,050) | 4,012 | -73% | 4,530 | 6.6% |
| Maple Valley | 3,297 | 2,320 | 893 | 4,190 | 93% | 1,427 | 2.0% |
| Mercer Island | 7,453 | 1,160 | 292 | 7,745 | 61% | 868 | 0.7% |
| Sammamish | 6,199 | 2,088 | 1,987 | 8,186 | 230% | 101 | 0.1% |
| Shoreline | 17,411 | 5,800 | 487 | 17,898 | 20% | 5,313 | 1.7% |
| Woodinville | 11,876 | 5,800 | 643 | 12,519 | 27% | 5,157 | 2.4% |
| **Subtotal** | **76,393** | **49,648** | **13,061** | **89,454** | **64%** | **36,587** | **2.4%** |
| **Small Cities** | | | | | | | |
| Algona | 1,879 | 244 | 263 | 2,142 | 261% | - | Met Target |
| Beaux Arts Village | 13 | 4 | 9 | 22 | 595% | - | Met Target |
| Black Diamond | 458 | 1,218 | 57 | 515 | 11% | 1,161 | 13.3% |
| Carnation | 871 | 429 | 15 | 886 | 8% | 414 | 2.7% |
| Clyde Hill | 713 | - | (79) | 634 | N/A | N/A | N/A |
| Covington | 3,528 | 1,531 | 1,485 | 5,013 | 234% | 46 | 0.1% |
| Duvall | 1,182 | 974 | 301 | 1,483 | 75% | 673 | 2.7% |
| Enumclaw | 4,960 | 853 | 96 | 5,056 | 27% | 757 | 0.9% |
| Hunts Point | 51 | - | 13 | 64 | N/A | N/A | N/A |
| Lake Forest Park | 1,612 | 244 | 165 | 1,777 | 164% | 79 | 0.3% |
| Medina | 409 | - | 110 | 519 | N/A | N/A | N/A |
| Milton | 22 | 186 | 98 | 120 | 128% | 88 | 4.3% |
| Newcastle | 1,736 | 853 | 891 | 2,627 | 253% | - | Met Target |
| Normandy Park | 773 | 75 | 161 | 934 | 516% | - | Met Target |
| North Bend | 2,707 | 1,218 | 590 | 3,297 | 117% | 628 | 1.1% |
| Pacific | 1,443 | 429 | (609) | 834 | -343% | 1,038 | 7.3% |
| Skykomish | 64 | - | 12 | 76 | N/A | N/A | N/A |
| Snoqualmie | 2,004 | 1,218 | 3,684 | 5,688 | 731% | - | Met Target |
| Yarrow Point | 109 | - | (49) | 60 | N/A | N/A | N/A |
| **Subtotal** | **24,534** | **9,475** | **7,213** | **31,747** | **184%** | **4,884** | **0.9%** |
| **Urban Unincorporated** | | | | | | | |
| Urban Unincorporated | 12,843 | 7,900 | 3,557 | 16,400 | 109% | 4,343 | 1.6% |
| **Subtotal** | **12,843** | **7,900** | **3,557** | **16,400** | **109%** | **4,343** | **1.6%** |
| **Urban King County** | **1,136,756** | **496,559** | **231,485** | **1,368,241** | **113%** | **265,074** | **1.1%** |

Source: King County 20211; PSRC, 2020.

Percent of Target Pace

0% — 100% +

## Achieved Non-Residential Density

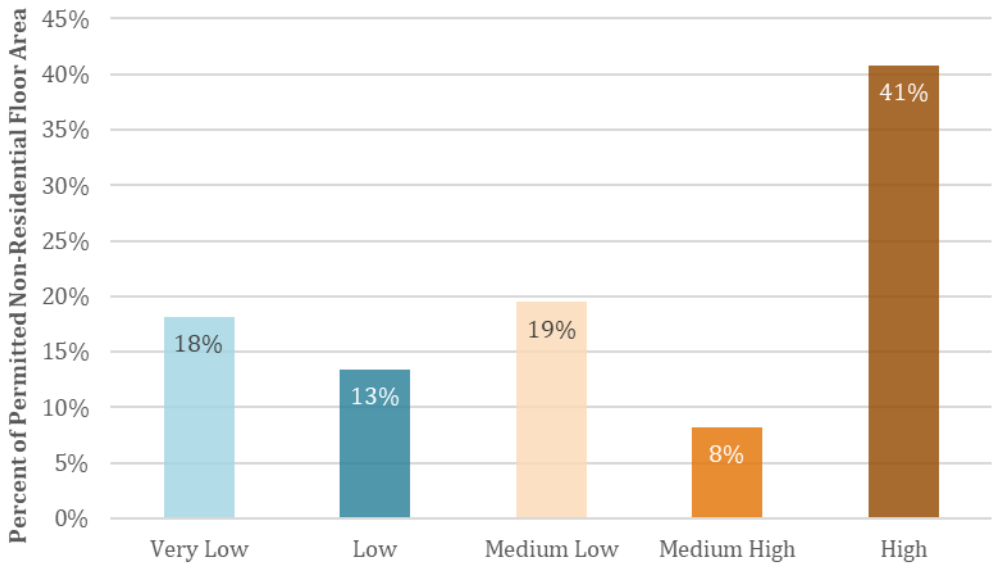
For non-residential construction that occurred between 2012 and 2018, jurisdictions evaluated achieved density in floor area ratio (FAR). This metric compares the built floor area of structures to the total area of the parcel. For multistory buildings, this method sums floor area on each story. This can result in floor area ratios greater than 1.0. When presenting the results of this analysis, this report summarizes achieved density in five density categories, shown in Exhibit 18.

**Exhibit 18. Categories for Summarizing Achieved Non-Residential Density (FAR)**

| Very Low | Low | Medium-Low | Medium-High | High |
|---|---|---|---|---|
| **Less than 0.35** | **0.35 – 0.5** | **0.5 – 1.0** | **1.0 – 3.0** | **Greater than 3.0** |

During the six-year analysis period, about 41% of all newly permitted non-residential development was High density (greater than 3 FAR), as shown in Exhibit 19. Medium-Low and Very Low were the two next common density levels. Medium-High was the least common with only 8% of all development.

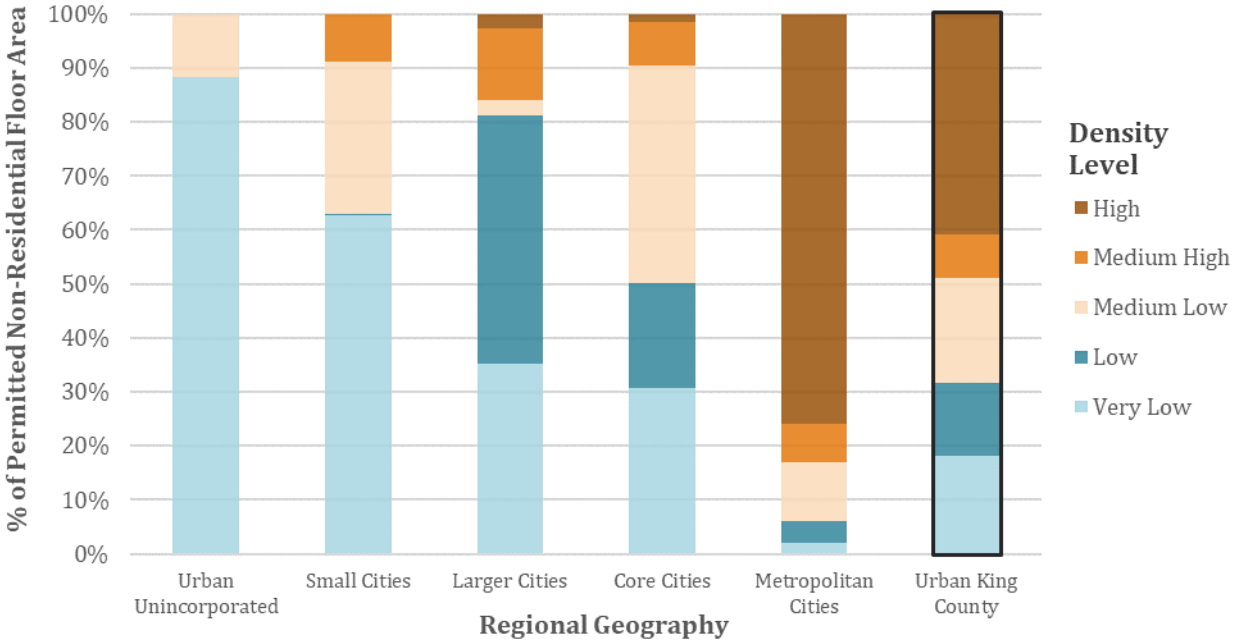
**Exhibit 19. Permitted Non-Residential Development by Achieved Density Level, 2012-2018**




Source: BERK, 2021, based on permit data summarized by King County jurisdictions.

Exhibit 20 shows the distribution of achieved non-residential density for each Regional Geography. About 75% of build square footage in Metropolitan Cities was developed at High density. In all other Regional Geographies, Low or Very Low development accounted for half or more of all square footage.

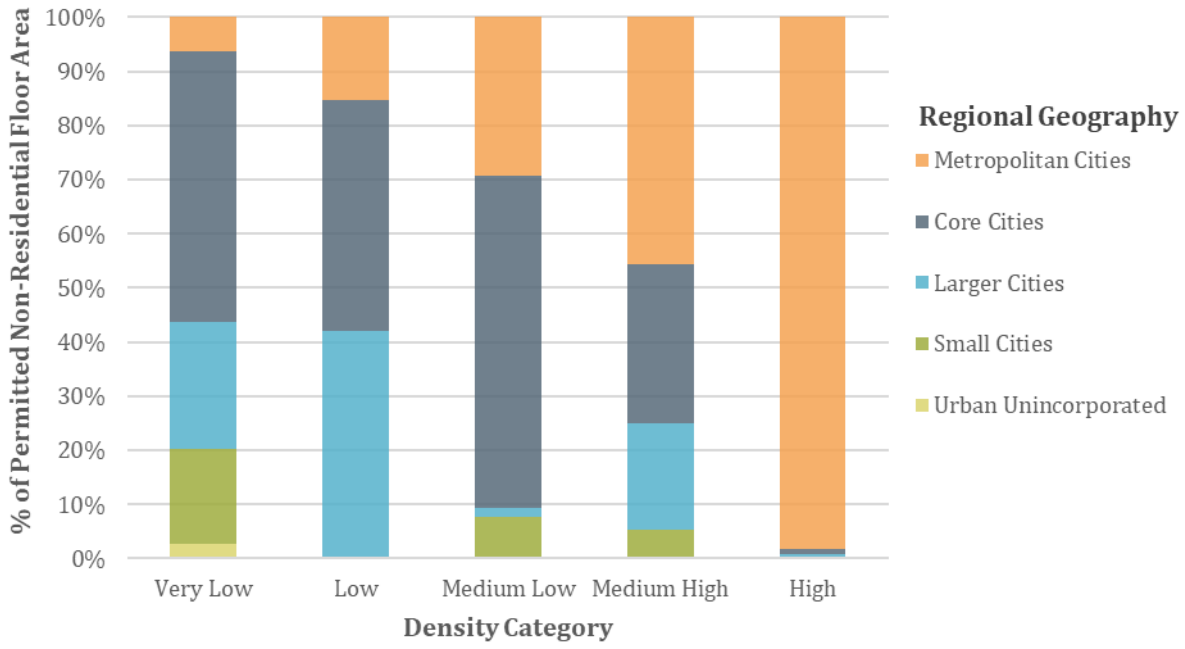
**Exhibit 20. Permitted Non-Residential Development by Regional Geography and Achieved Density, 2012-2018**




Source: BERK, 2021, based on permit data summarized by King County jurisdictions.

Exhibit 21 presents the same permit data transposed to show the distribution by Regional Geography for each achieved density level. Not surprisingly, nearly all High-density development occurred in Metropolitan Cities. Development at other density levels was spread out across different Regional Geographies. The one exception is Urban Unincorporated, which saw very limited development overall and mostly in Very Low density projects.

**Exhibit 21. Permitted Non-Residential Development by Achieved Density and Regional Geography, 2012-2018**




Source: BERK, 2021, based on permit data summarized by King County jurisdictions.

# Ch. 6 Conclusions: Capacity and Growth Targets

This chapter presents urban growth capacity for housing and jobs in King County. Summaries include capacity for the county as a whole, individual jurisdictions, and a set of five Regional Geographies for grouping individual jurisdictions based on the Puget Sound Regional Council (PSRC) VISION 2050 growth plan: Metropolitan Cities, Core Cities, High Capacity Transit (HCT) Communities, Cities & Towns, and Urban Unincorporated areas. See Exhibit 22 for a map of jurisdictions by Regional Geography.

The Regional Geographies used in this chapter and in the jurisdictional profiles in Chapter 7 should not be confused with the older VISION 2040 Regional Geographies discussed in Chapter 4. These new geographies are consistent with those used in the VISION 2050 multicounty planning policies developed through PSRC in 2020, although all unincorporated urban areas are included in the urban unincorporated category.

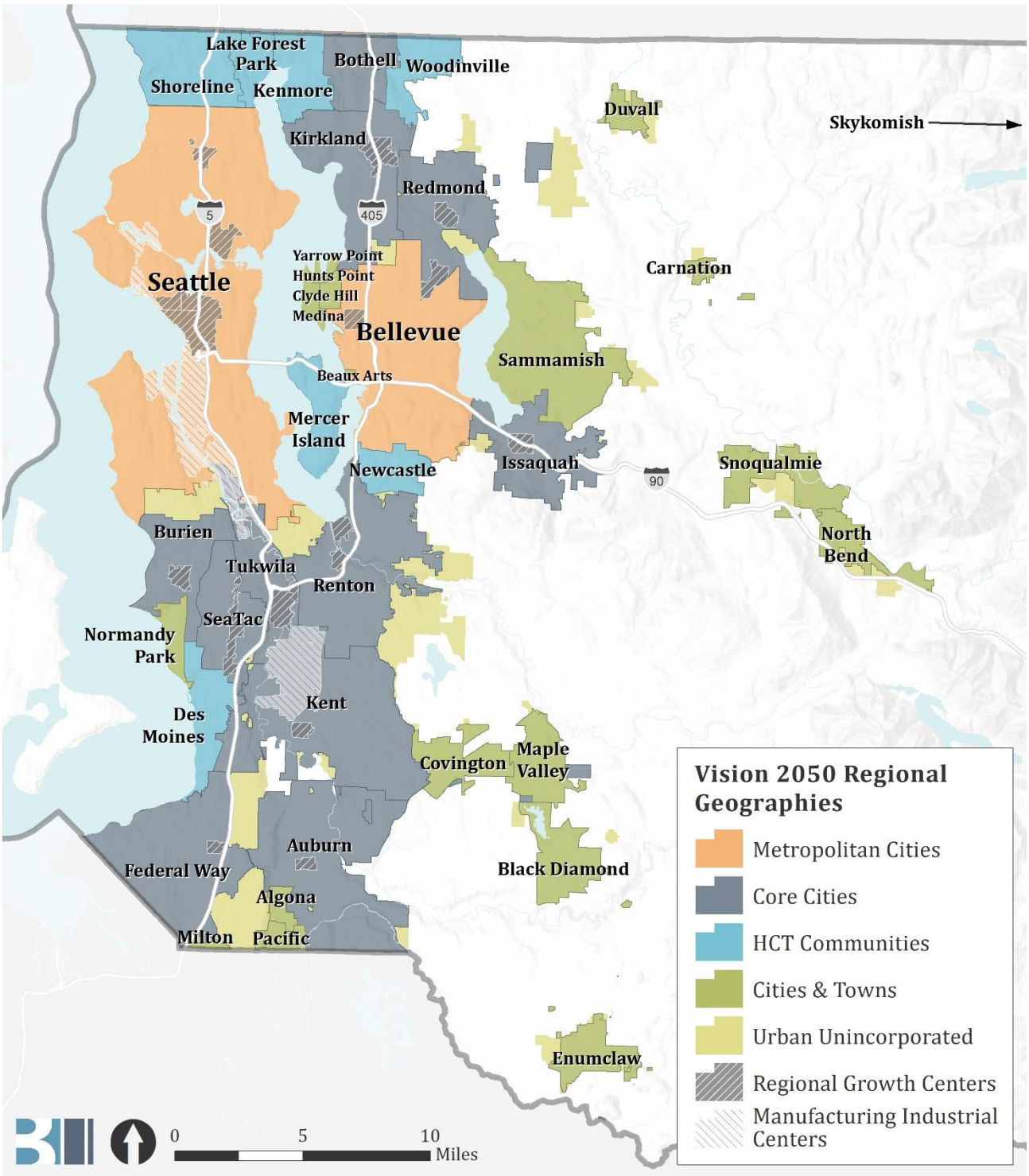
The next public draft of this report will include updated 2044 growth targets for jurisdictions in King County, along with an analysis of Urban King County's ability to accommodate updated growth targets.

## General Findings

As a whole, King County has growth capacity of 394,230 housing units and 576,498 jobs in the urban areas of the county. This capacity is distributed within jurisdictions across the county, as shown in Exhibit 23. This exhibit breaks down both housing and employment capacity by VISION 2050 Regional Geography, and it shows the share of capacity by jurisdiction within each geography. Note that data for cities that straddle two counties include only the King County portion.[4]

[4] These cities include Auburn, Bothell, Milton, and Pacific.

**Exhibit 22. Map of VISION 2050 Regional Geographies**




Sources: PSRC VISION 2050; BERK, 2021.

## Exhibit 23. Housing and Job Capacity by VISION 2050 Regional Geography and Jurisdiction

| Jurisdiction | Total Housing Capacity (Units) | Share of Housing Capacity in Regional Geography | Total Job Capacity (Jobs) | Share of Job Capacity in Regional Geography |
|---|---|---|---|---|
| **Metropolitan Cities** | | | | |
| Bellevue | 26,859 | 13% | 117,241 | 32% |
| Seattle | 172,440 | 87% | 245,598 | 68% |
| **Subtotal** | **199,298** | | **362,839** | |
| **Core Cities** | | | | |
| Auburn | 9,151 | 8% | 7,927 | 5% |
| Bothell | 6,370 | 5% | 9,015 | 5% |
| Burien | 10,816 | 9% | 752 | 0% |
| Federal Way | 2,667 | 2% | 14,761 | 9% |
| Issaquah | 14,103 | 12% | 15,561 | 9% |
| Kent | 11,248 | 10% | 28,995 | 17% |
| Kirkland | 13,352 | 11% | 18,139 | 11% |
| Renton | 16,503 | 14% | 26,210 | 16% |
| SeaTac | 6,396 | 5% | 15,565 | 9% |
| Tukwila | 8,219 | 7% | 13,691 | 8% |
| Redmond | 17,777 | 15% | 15,851 | 10% |
| **Subtotal** | **116,600** | | **166,468** | |
| **HCT Communities** | | | | |
| Des Moines | 8,386 | 17% | 1,649 | 10% |
| Kenmore | 4,135 | 8% | 3,881 | 23% |
| Lake Forest Park | 1,870 | 4% | 691 | 4% |
| Mercer Island | 1,607 | 3% | 961 | 6% |
| Newcastle | 3,234 | 6% | 680 | 4% |
| Shoreline | 27,256 | 54% | 4,456 | 27% |
| Woodinville | 3,705 | 7% | 4,373 | 26% |
| **Subtotal** | **50,193** | | **16,691** | |
| **Cities & Towns** | | | | |
| Algona | 266 | 1% | 313 | 1% |
| Beaux Arts | 2 | 0% | 0 | 0% |
| Black Diamond | 8,434 | 38% | 3,188 | 11% |
| Carnation | 704 | 3% | 2,864 | 10% |
| Clyde Hill | 5 | 0% | 28 | 0% |
| Covington | 4,609 | 21% | 8,421 | 29% |
| Duvall | 1,343 | 6% | 681 | 2% |
| Enumclaw | 1,308 | 6% | 1,152 | 4% |
| Hunts Point | 5 | 0% | 0 | 0% |
| Maple Valley | 1,573 | 7% | 1,096 | 4% |
| Medina | 8 | 0% | 0 | 0% |
| Milton | 66 | 0% | 1,213 | 4% |
| Normandy Park | 153 | 1% | 35 | 0% |
| North Bend | 2,098 | 9% | 5,759 | 20% |
| Pacific | 137 | 1% | 77 | 0% |
| Sammamish | 1,144 | 5% | 305 | 1% |
| Skykomish | 29 | 0% | 0 | 0% |
| Snoqualmie | 372 | 2% | 4,079 | 14% |
| Yarrow Point | 17 | 0% | 0 | 0% |
| **Subtotal** | **22,271** | | **29,211** | |
| **Urban Unincorporated** | | | | |
| **Subtotal** | **5,867** | | **1,289** | |
| **Total Urban Capacity:** | **394,230** | **Housing Units** | **576,498** | **Jobs** |

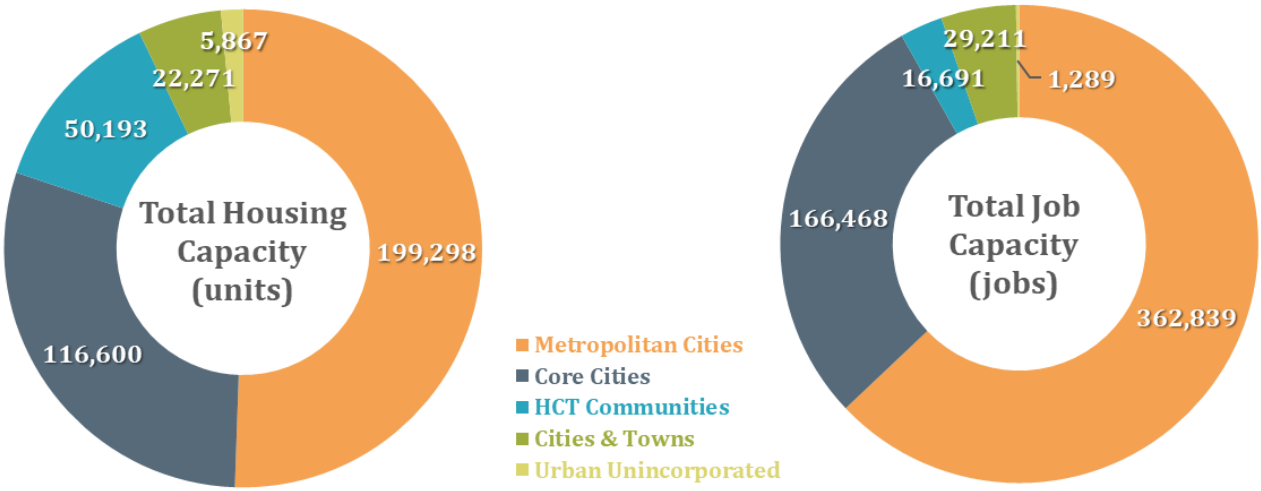
Sources: BERK, 2021; Data provided by individual King County jurisdictions, 2020-2021.

# Findings by Regional Geography

Exhibit 24 summarizes housing and job capacity in King County, with breakdowns by VISION 2050 Regional Geographies. Over half of all housing capacity is in the Metropolitan Cities (Seattle and Bellevue), with another 30% of capacity located in Core Cities. Job capacity is even more focused in Metropolitan Cities and Core Cities. Only 20% of housing capacity and less than 9% of all job capacity is located in the HCT Communities, Cities & Towns, or Urban Unincorporated categories. HCT Communities have a much higher relative share of housing capacity with 13% of countywide total, compared to only 3% of countywide job capacity.

**Exhibit 24. Capacity Summary, King County – VISION 2050 Geographies**

| VISION 2050 Regional Geographies | Total Housing Capacity | | Total Job Capacity | |
|---|---|---|---|---|
| | Units | Percent | Jobs | Percent |
| Metropolitan Cities | 199,298 | 51% | 362,839 | 63% |
| Core Cities | 116,600 | 30% | 166,468 | 29% |
| HCT Communities | 50,193 | 13% | 16,691 | 3% |
| Cities & Towns | 22,271 | 6% | 29,211 | 5% |
| Urban Unincorporated | 5,867 | 1% | 1,289 | 0.2% |
| **Total Urban Capacity** | **394,230** | **Housing Units** | **576,498** | **Jobs** |




Sources: BERK, 2021; Data provided by individual King County jurisdictions, 2020-2021.

## Residential Capacity

Exhibits in this section are grouped both by VISION 2050 Regional Geographies, as well as by assumed density level. For capacity calculations, individual jurisdictions selected an assumed density level for each zone based on a combination of factors, including the achieved density measured in historic development activity as well as current planned density. See Chapter 3 for more information about achieved density.

For residential capacity, each zone is categorized by density level according to the assumed dwelling units per acre (du/acre) for future development. Exhibits reporting residential capacity throughout the rest of this report rely on the following density levels, consistent with the categorization of achieved density levels in Ch. 4.

**Exhibit 25. Assumed Density Levels – Residential Capacity (dwelling units per acre)**

| Very Low | Low | Medium-Low | Medium-High | High |
|---|---|---|---|---|
| **Less than 4** | **4 - 10** | **10 – 24** | **24 – 48** | **Greater than 48** |

Source: BERK, 2021

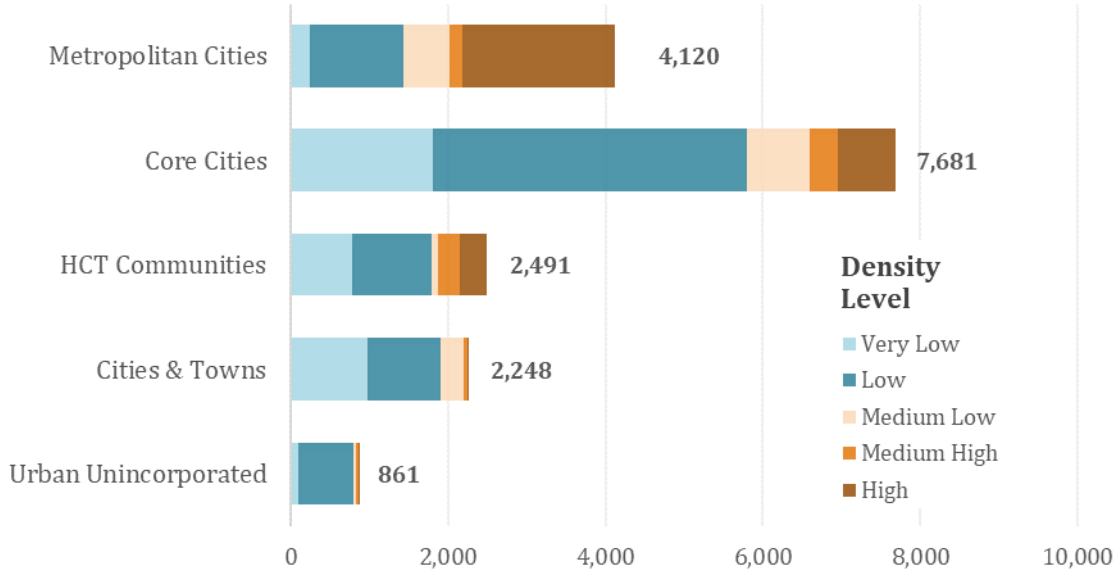
## Residential Land Supply

Exhibit 26 and Exhibit 27 show the breakdown of the net buildable land for residential development after all deductions have been made. Deductions include the removal of critical acres and critical area buffers, infrastructure constrained areas, future rights of way and usage for public purpose, and market factor. It is important to emphasize that these exhibits do not show growth capacity for new housing units, rather they show the acreage of land available for residential development.

There are 17,400 acres of buildable land available for residential development. Much of that land is grouped in the very low and low assumed density levels. This exhibit highlights the relative higher amount of land available in Very Low and Low density levels.

**Exhibit 26. Buildable Residential Land by Assumed Density (acres)**

| Vision 2050 Geography | Assumed Density | | | | | Total | |
|---|---|---|---|---|---|---|---|
| | Very Low | Low | Medium Low | Medium High | High | # | % |
| Metropolitan Cities | 244 | 1,190 | 590 | 152 | 1,944 | 4,120 | 24% |
| Core Cities | 1,807 | 3,985 | 801 | 363 | 725 | 7,681 | 44% |
| HCT Communities | 772 | 1,016 | 74 | 287 | 341 | 2,491 | 14% |
| Cities & Towns | 980 | 927 | 284 | 46 | 11 | 2,248 | 13% |
| Urban Unincorporated | 95 | 697 | 35 | 28 | 5 | 861 | 5% |
| **Urban King County** | **3,898** | **7,815** | **1,784** | **877** | **3,026** | **17,400** | **100%** |

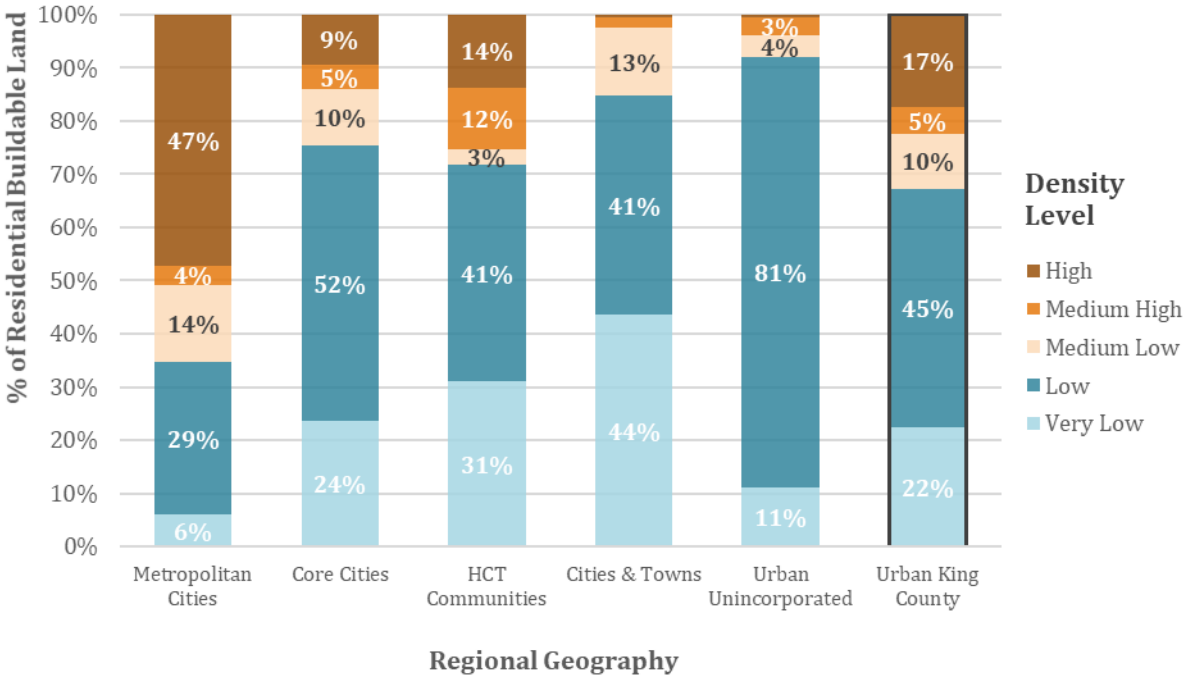



Note: Metropolitan Cities includes estimated breakdowns of residential/non-residential land supply in Seattle.
Sources: BERK, 2021; Data provided by individual King County jurisdictions, 2020-2021.

Exhibit 27 shows similar data presented by percent breakdown by geography by assumed density level as opposed to total acres of residential land supply. Metropolitan Cities have the greatest share of land supply allocated for higher density development, with 51% of available land for residential development falling into Medium-High or High density zones. The share of land in these density levels is much lower in the other Regional Geographies. HCT Communities have a somewhat higher share of Medium-High and High density land supply (26%) than Core Cities (14%), likely reflecting a relatively larger share of land in zones established to support transit-oriented residential and mixed-use development.

Across the entire county, roughly two-thirds of residential land supply falls into the Low or Very Low density levels, with just 22% of land supply categorized as High density or Medium-High density. While there is less residential land supply available at the higher density levels, the higher density levels allow for a far larger relative share of housing unit growth capacity, as discussed in the following section.

**Exhibit 27. Percent of Residential Buildable Land by Regional Geography and Assumed Density**



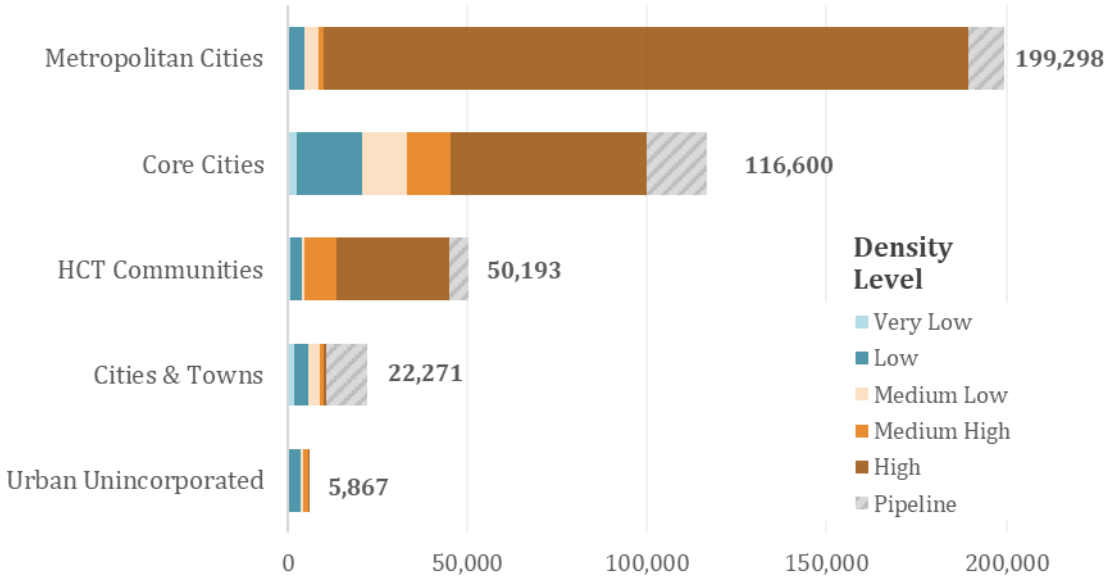

Note: Metropolitan Cities includes estimated breakdowns of residential/non-residential land supply in Seattle.
Sources: BERK, 2021; Data provided by individual King County jurisdictions, 2020-2021.

## Residential Unit Capacity

Exhibit 28 and Exhibit 29 show residential growth capacity in terms of housing units, broken down by assumed density level and pipeline capacity. Pipeline capacity refers to housing units or non-residential development that has been permitted for construction, but not yet built as of the baseline for this study of January 1, 2019. Parcels with pipeline development are set aside and not counted in the remaining capacity broken down by assumed density level. See Chapter 3 for a more detailed discussion.

**Exhibit 28. Housing Capacity by Assumed Density (units)**

| Vision 2050 Geography | Assumed Density | | | | | | Total | |
|---|---|---|---|---|---|---|---|---|
| | Very Low | Low | Medium Low | Medium High | High | Pipeline | # | % |
| Metropolitan Cities | 438 | 4,308 | 3,803 | 1,291 | 179,473 | 9,984 | 199,298 | 51% |
| Core Cities | 2,555 | 18,307 | 12,447 | 11,991 | 54,566 | 16,734 | 116,600 | 30% |
| HCT Communities | 831 | 3,090 | 815 | 8,710 | 31,509 | 5,239 | 50,193 | 13% |
| Cities & Towns | 1,867 | 3,680 | 3,276 | 1,123 | 770 | 11,555 | 22,271 | 6% |
| Urban Unincorporated | 61 | 3,544 | 823 | 1,184 | 256 | 0 | 5,867 | 1% |
| **Urban King County** | **5,753** | **32,930** | **21,163** | **24,299** | **266,573** | **43,512** | **394,230** | **100%** |

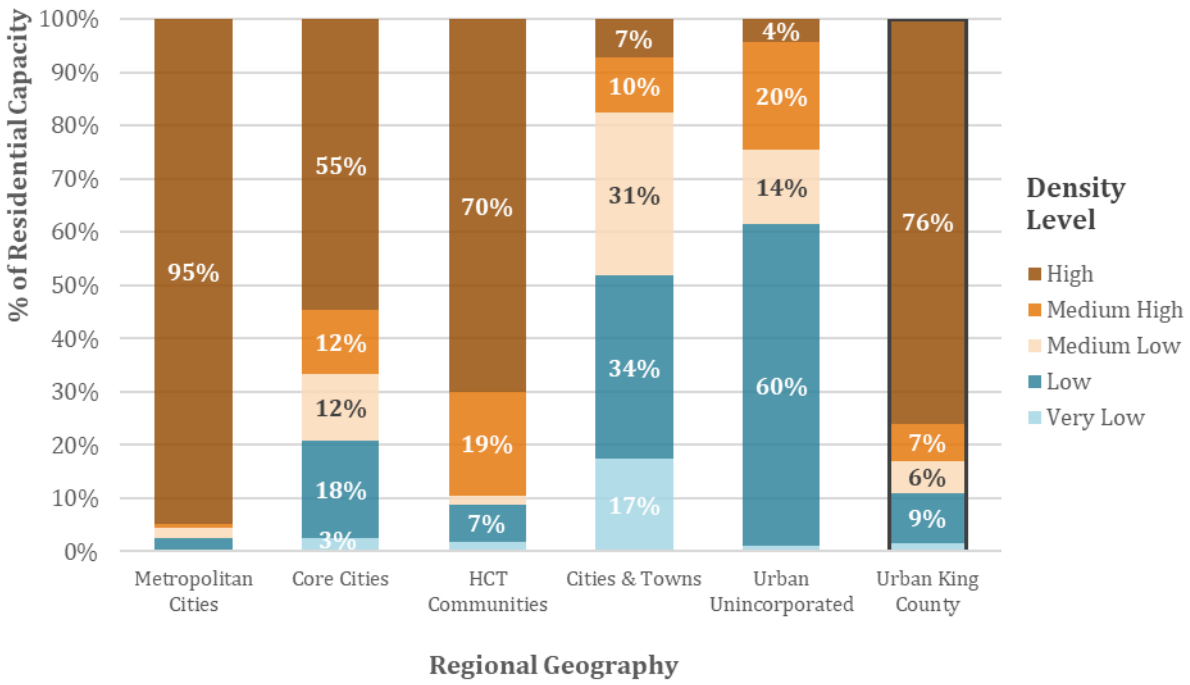



Sources: BERK, 2021; Data provided by individual King County jurisdictions, 2020.

There is growth capacity for nearly 200,000 housing units in Metropolitan Cities, followed by capacity for roughly 116,000 housing units in Core Cities. These two VISION 2050 geographies make up 80% of urban housing unit capacity in King County. The remaining 20% of capacity found in HCT Communities, with capacity for just over 50,000 housing units; Cities & Towns, with capacity for over 22,000 housing units; and the Urban Unincorporated areas, with capacity for nearly 6,000 housing units.

Exhibit 29 shows the percent breakdown of housing unit capacity by assumed density level. Countywide, over three-quarters of urban housing capacity (266,000 units) is in High density zones (see also Exhibit 28). Almost all of the housing capacity in Metropolitan Cities is in High density zones, and in Core Cities and HCT Communities, the majority of capacity is in High and Medium-High density zones. Cities & Towns and Urban Unincorporated areas have a much greater share of capacity in Low and Very Low density zones.

**Exhibit 29. Percent of Non-Pipeline Housing Unit Capacity by Assumed Density**




Sources: BERK, 2021; Data provided by individual King County jurisdictions, 2020.

# Employment Capacity

Exhibits in this section are grouped both by VISION 2050 Regional Geographies, as well as by assumed density level. For non-residential capacity, each zone is categorized by density level according to the assumed floor area ratio (FAR) for future development. Exhibits reporting non-residential capacity throughout the rest of this report rely on the following density levels, consistent with the categorization of achieved density in Ch. 4.

**Exhibit 30. Assumed Density Levels – Non-Residential Capacity (FAR)**

| Very Low | Low | Medium-Low | Medium-High | High |
|---|---|---|---|---|
| **Less than 0.35** | **0.35 – 0.5** | **0.5 – 1.0** | **1.0 – 3.0** | **Greater than 3.0** |

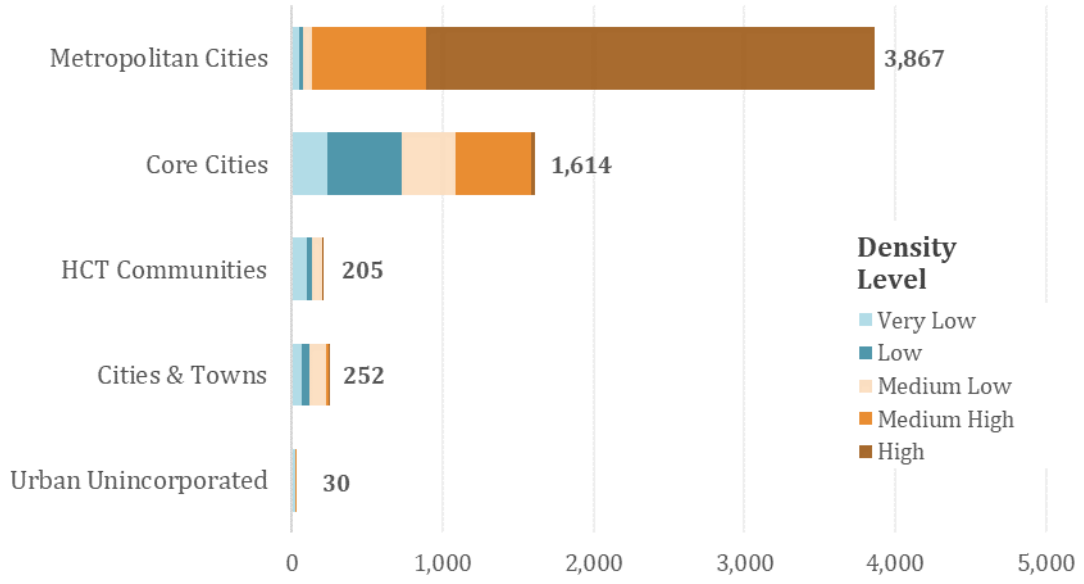
Source: BERK, 2021.

## Nonresidential Land Supply

Exhibit 31 and Exhibit 32 show the breakdown of the net buildable land for non-residential development after all deductions have been made. This also includes removal of critical acres and critical area buffers, infrastructure constrained areas, future rights-of-way and usage for public purpose, and market factor. It is important to emphasize that these exhibits do not show growth capacity, rather they show the dispersion of land available for non-residential growth.

**Exhibit 31. Buildable Non-Residential Land by Assumed Density (acres)**

| Geography | Assumed Density Level | | | | | Total | |
|---|---|---|---|---|---|---|---|
| | Very Low | Low | Medium Low | Medium High | High | # | % |
| Metropolitan Cities | 51 | 24 | 58 | 760 | 2,974 | 3,867 | 65% |
| Core Cities | 234 | 492 | 358 | 506 | 24 | 1,614 | 27% |
| HCT Communities | 102 | 32 | 64 | 5 | 1 | 205 | 3% |
| Cities & Towns | 68 | 45 | 111 | 24 | 5 | 252 | 4% |
| Urban Unincorporated | 26 | 0 | 0 | 4 | 0 | 30 | 1% |
| **Urban King County** | **481** | **593** | **591** | **1,298** | **3,005** | **5,968** | **100%** |

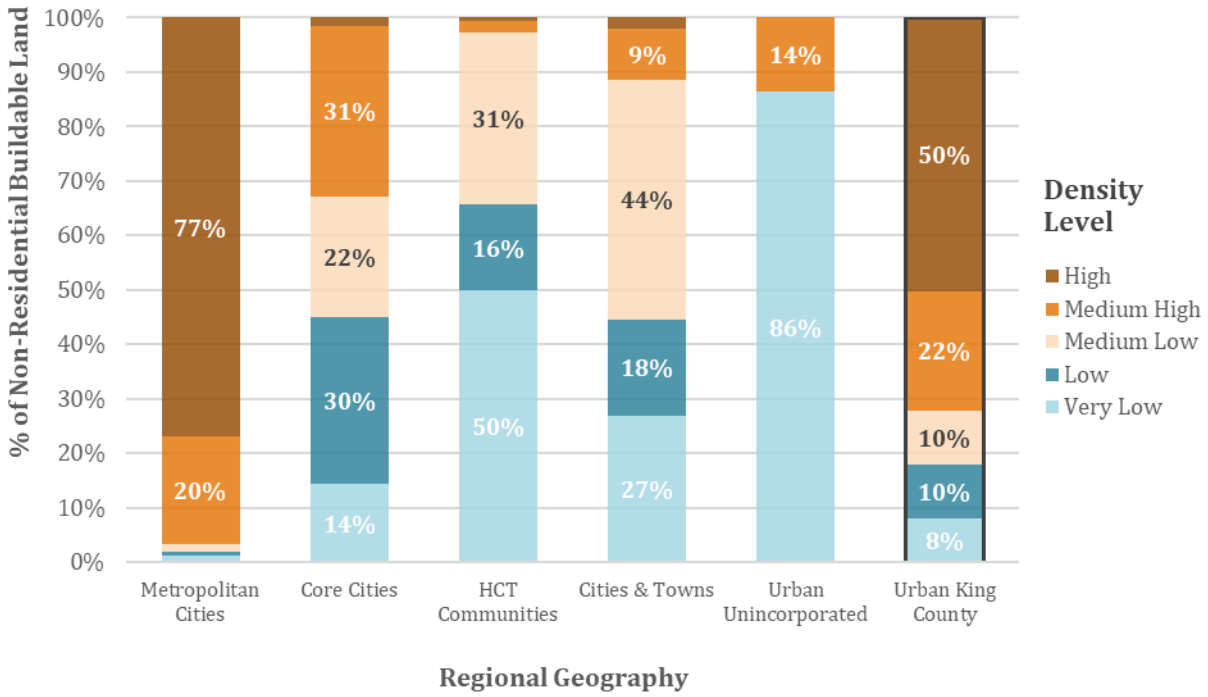



Note: Metropolitan Cities includes estimated breakdowns of residential/non-residential land supply in Seattle.
Sources: BERK, 2021; Data provided by individual King County jurisdictions, 2020-2021.

There are nearly 6,000 acres of buildable land available for non-residential development. The overwhelming majority of non-residential land supply is focused in Metropolitan Cities and Core Cities, consistent with the location of regional growth center (RGCs) and manufacturing-industrial centers (MICs) in the VISION 2050 plan (shown in Exhibit 22).

HCT Communities, Cities & Towns, and Urban Unincorporated areas have far less land available for non-residential development, totaling just 8% of total non-residential urban land supply across the county.

**Exhibit 32. Percent of Non-Residential Buildable Land by Assumed Density**




Note: Metropolitan Cities includes estimated breakdowns of residential/non-residential land supply in Seattle.
Sources: BERK, 2021; Data provided by individual King County jurisdictions, 2020-2021.

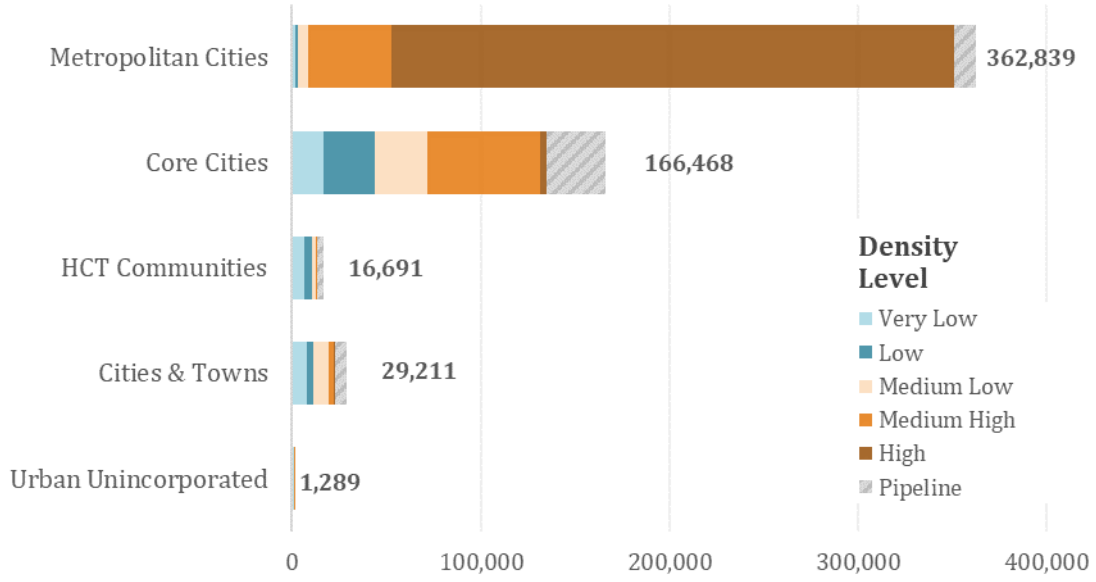
Across all of urban King County, half of land available for non-residential development is at the High assumed density level, with the 22% in the Medium-High level, and the remaining land supply spread across the lower assumed density levels. Similar to the residential side of land supply, the Metropolitan Cities have the highest share of buildable land in the High density level, with comparatively less land available for non-residential development available in the Medium-Low, Low, and Very Low density levels. The breakdown is more varied amongst the Core Cities, HCT Communities, and Cities & Towns, with Urban Unincorporated areas being comprised of almost entirely Very Low density land supply for non-residential development.

## Capacity for Job Growth

Exhibit 33 and Exhibit 34 show non-residential growth capacity in terms of jobs, broken down by assumed density level and pipeline capacity.

**Exhibit 33. Job Capacity by Assumed Density (jobs)**

| Geography | Assumed Density Level | | | | | | Total | |
|---|---|---|---|---|---|---|---|---|
| | Very Low | Low | Medium Low | Medium High | High | Pipeline | # | % |
| Metropolitan Cities | 1,699 | 1,694 | 5,056 | 44,174 | 298,572 | 11,645 | 362,839 | 63% |
| Core Cities | 16,463 | 27,383 | 27,673 | 60,000 | 3,296 | 31,653 | 166,468 | 29% |
| HCT Communities | 6,697 | 3,885 | 2,034 | 686 | 124 | 3,265 | 16,691 | 3% |
| Cities & Towns | 7,508 | 3,761 | 8,113 | 2,725 | 747 | 6,355 | 29,211 | 5% |
| Urban Unincorporated | 1,004 | 0 | 0 | 285 | 0 | 0 | 1,289 | 0% |
| **Total** | **33,371** | **36,723** | **42,876** | **107,870** | **302,740** | **52,918** | **576,498** | **100%** |




Sources: BERK, 2021; Data provided by individual King County jurisdictions, 2020.

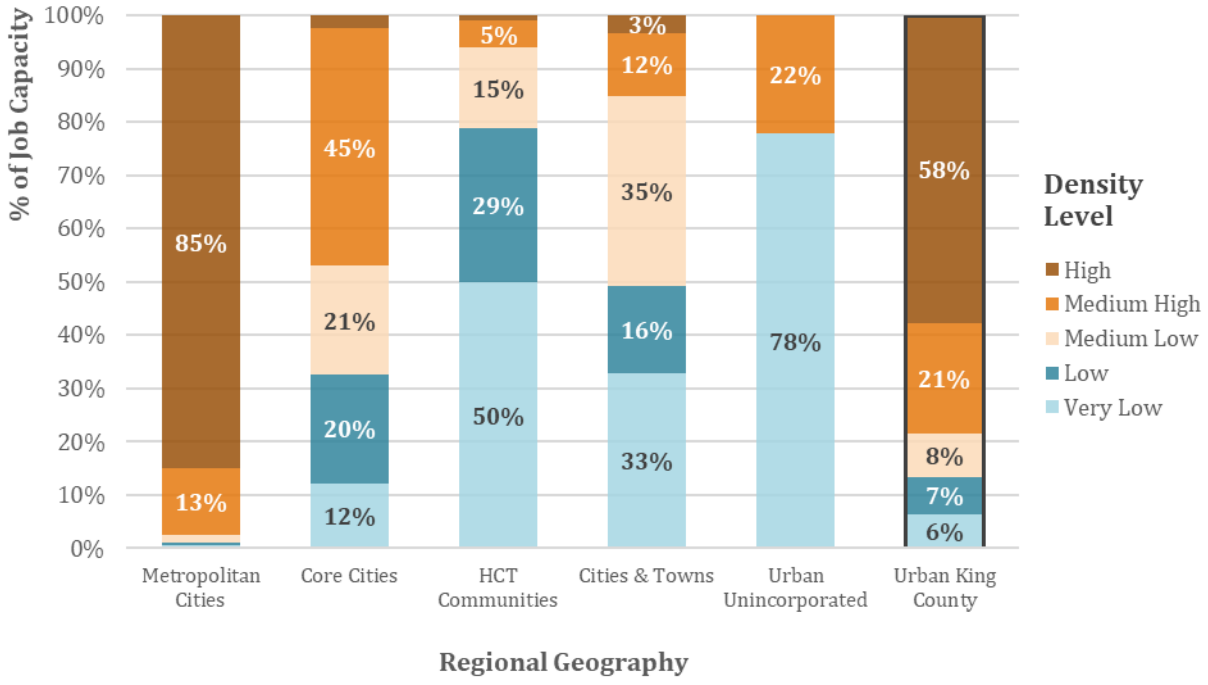
The Metropolitan Cities have capacity for nearly 363,000 jobs, 63% of total urban job capacity in King County. Most of this capacity in both Metropolitan Cities and countywide is in the High assumed density level. Countywide, there is capacity for 302,740 jobs in the High assumed density level, with 298,572 of those found in Metropolitan Cities.

Capacity for another 166,468 jobs is found in Core Cities, 29% of total urban job capacity in King County. This capacity is more evenly spread across the various assumed density levels, with a slightly higher concentration in the Medium-High level.

There is comparatively less job capacity elsewhere in the county, with HCT Communities, Cities & Towns, and Urban Unincorporated areas only comprising roughly 8% of total job capacity, or just over 47,000 jobs.

Exhibit 34 shows the percent breakdown of job capacity by density levels within the VISION 2050 Regional Geographies.

**Exhibit 34. Percent of Non-Pipeline Job Capacity by Assumed Density**




Sources: BERK, 2021; Data provided by individual King County jurisdictions, 2020.

Nearly all the job capacity in Metropolitan Cities is in the High or Medium-High density zones, similar to the residential capacity results. In Core Cities, the largest share of job capacity is in the Medium-High assumed density level, while in HCT Communities, Cities & Towns, and Urban Unincorporated areas, job capacity is more spread across the assumed density levels.

Countywide, nearly 80% of job capacity in urban areas is found in High or Medium-High density zones, with remaining capacity spread somewhat evenly across Medium-Low, Low, and Very Low density zones.

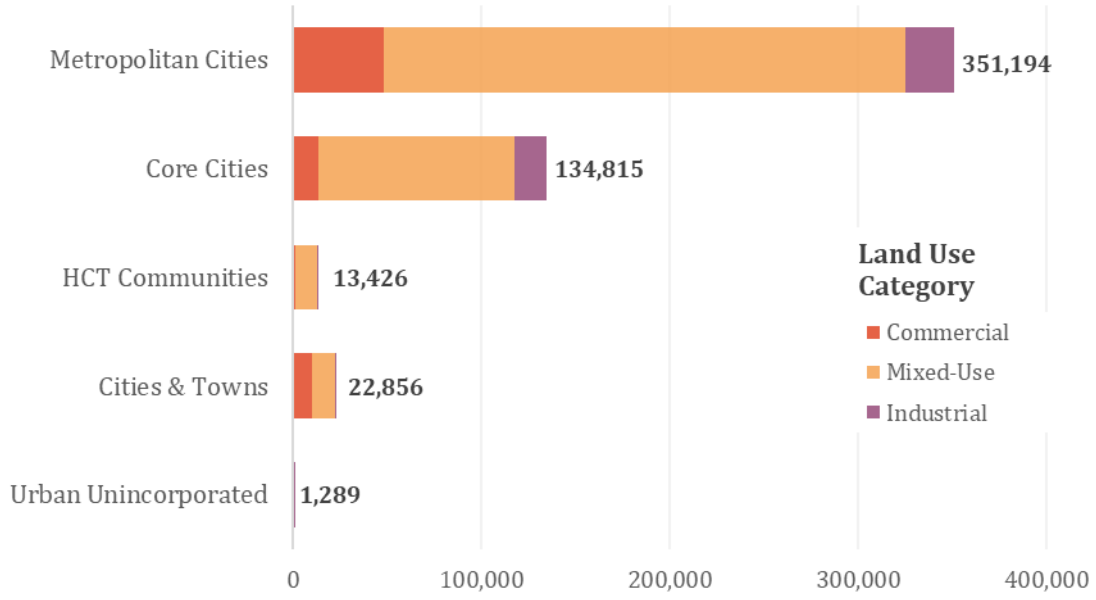
## Job Capacity by Land Use Type

Throughout this study, jurisdictions were asked to categorize zones with potential for non-residential development by broad land use types: commercial, mixed-use, and industrial. The following section presents non-pipeline job capacity by those land use types and broken down by VISION 2050 Regional Geography. It is important to note that some jurisdictions allow for commercial development in industrial zones, industrial development in commercial zones, and multiple uses in mixed-use zones.[5]

[5] Since many jurisdictions allow for non-commercial uses in some commercial zones, a portion of job growth in commercial zones is likely to be from non-commercial jobs. Therefore, this study uses the phrase 'job capacity in commercial zones' instead of 'commercial job capacity' to describe job capacity by land use type.

**Exhibit 35. Non-Pipeline Job Capacity by Land Use Type (jobs)**

| Geography | Land Use Type | | | Total |
|---|---|---|---|---|
| | Commercial | Mixed-Use | Industrial | |
| Metropolitan Cities | 48,223 | 277,042 | 25,929 | 351,194 |
| Core Cities | 14,033 | 103,672 | 17,109 | 134,815 |
| HCT Communities | 1,813 | 11,305 | 308 | 13,426 |
| Cities & Towns | 10,110 | 12,180 | 565 | 22,856 |
| Urban Unincorporated | 285 | 425 | 579 | 1,289 |
| **Urban King County** | **74,465** | **404,625** | **44,490** | **523,580** |

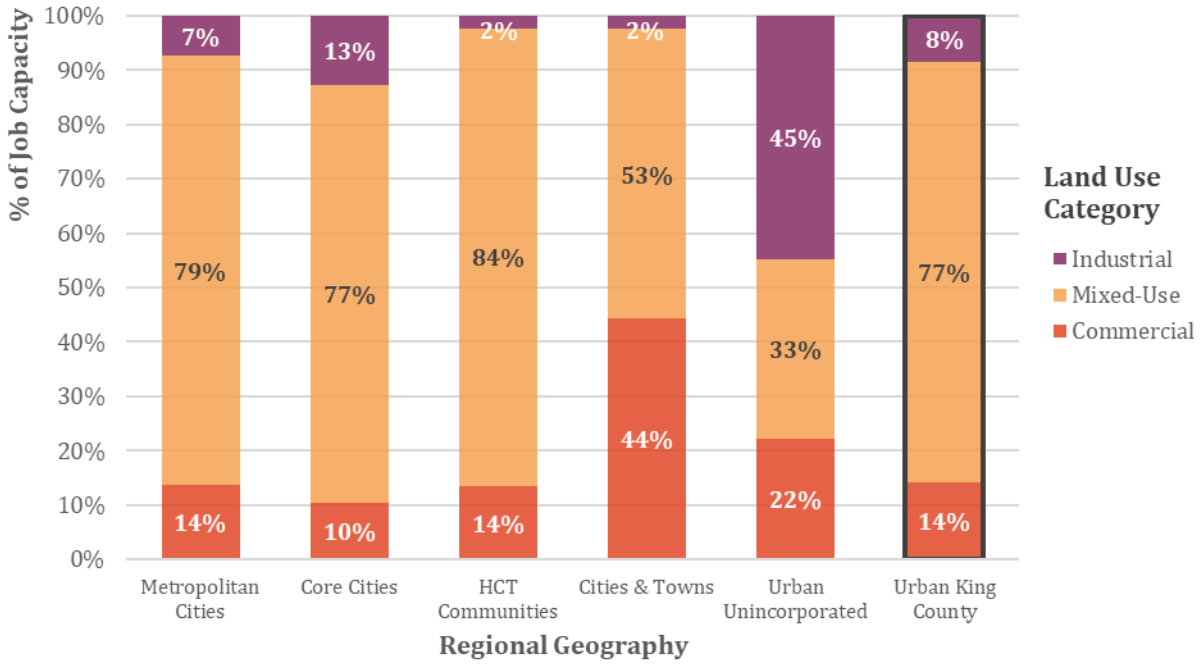



Sources: BERK, 2021; Data provided by individual King County jurisdictions, 2020.

Across all geographies, the majority of job capacity is found in mixed-use zones. In urban King County, there is capacity for over 400,000 jobs in mixed-used zones, nearly 75,000 jobs in commercial zones, and nearly 45,000 jobs in industrial zones. In Metropolitan Cities alone, there is capacity for over 275,000 jobs in mixed-use zones.

Metropolitan Cities and Core Cities have the greatest amount of job capacity in industrial zones, with HCT Communities and Cities & Towns having a relative higher amount of job capacity in mixed-use and commercial zones.

**Exhibit 36. Percent of Non-Pipeline Job Capacity by Land Use Type**




Sources: BERK, 2021; Data provided by individual King County jurisdictions, 2020.

In Metropolitan Cities, Core Cities, and HCT Communities, over three quarters of job capacity is found in mixed-use zones. Countywide, 77% of urban job capacity is found in mixed-use zones. HCT Communities and Cities & Towns have a small share of job capacity in industrial zones, just 2%. Cities & Towns have the highest share of job capacity in commercial zones, at 44%, whereas all other geographies have between just 10%-22% of job capacity found in commercial zones.

## Growth Targets

*After 2019-2044 growth targets are finalized, this section will present targets by Regional Geography and jurisdiction and compare to capacity for growth. Ultimately, jurisdictions will demonstrate zoned or planned capacity for their targets in comprehensive plans, though capacity calculated in the Urban Growth Report provides a helpful point of comparison.*

# Ch. 7 Profiles of Cities and Unincorporated Areas

This chapter provides detailed profiles summarizing findings for each individual jurisdiction. The profiles are divided into four separate pages covering the following topics:

- Page 1: Housing Growth and Residential Development Trends
- Page 2: Residential Land Supply and Capacity
- Page 3: Employment Growth and Commercial/Industrial Development Trends
- Page 4: Commercial/Industrial Land Supply and Job Capacity

These jurisdictions are presented alphabetically by Vison 2050 Regional Geography, as shown in Exhibit 37.

**Exhibit 37. Profiled King County Jurisdictions by VISION 2050 Regional Geography**

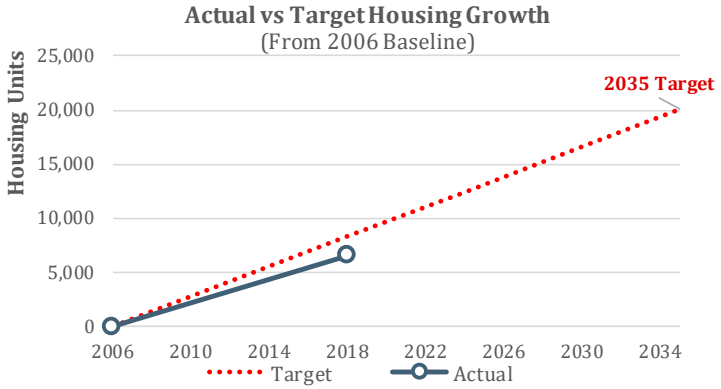
| | | | |
|---|---|---|---|
| **Metropolitan Cities** | ▪ City of Bellevue | ▪ City of Seattle | |
| **Core Cities** | ▪ City of Auburn<br>▪ City of Bothell<br>▪ City of Burien<br>▪ City of Federal Way | ▪ City of Issaquah<br>▪ City of Kent<br>▪ City of Kirkland<br>▪ City of Redmond | ▪ City of Renton<br>▪ City of SeaTac<br>▪ City of Tukwila<br>▪ |
| **High Capacity Transit Communities** | ▪ City of Des Moines<br>▪ City of Kenmore<br>▪ City of Lake Forest Park | ▪ City of Mercer Island<br>▪ City of Newcastle | ▪ City of Shoreline<br>▪ City of Woodinville |
| **Cities and Towns** | ▪ City of Algona<br>▪ City of Beaux Arts<br>▪ City of Black Diamond<br>▪ City of Carnation<br>▪ City of Clyde Hill<br>▪ City of Covington<br>▪ City of Duvall | ▪ City of Enumclaw<br>▪ Town of Hunts Point<br>▪ City of Maple Valley<br>▪ City of Medina<br>▪ City of Milton<br>▪ City of Normandy Park | ▪ City of North Bend<br>▪ City of Pacific<br>▪ City of Sammamish<br>▪ Town of Skykomish<br>▪ City of Snoqualmie<br>▪ Town of Yarrow Point |
| **Urban Unincorporated Areas** | ▪ All urban unincorporated areas combined | | |

# Metropolitan Cities

City of Bellevue
City of Seattle

# City of Bellevue

## Housing Growth and Residential Development Trends




| Bellevue Housing Growth Target: 2006-2035 | 20,056 |
|---|---|
| 2006 Estimated Housing Units | 55,107 |
| 2018 Estimated Housing Units | 61,698 |
| **Estimated Housing Growth** | **6,591** |
| Remaining 2035 Target | 13,465 |

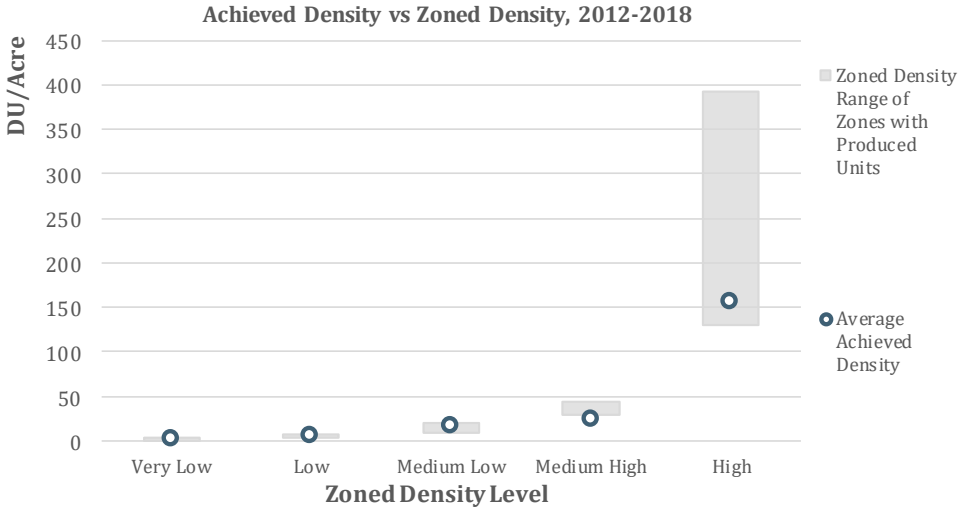
| % of Pace Needed to Achieve 2035 Housing Growth Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| 79.4% | 1.00% | 1.28% |

Since 2006, Bellevue has grown at 79% of the pace needed to achieve its 2035 housing growth target of 20,056 units. During this period, the total number of housing units in Bellevue grew by roughly 12%. At this current rate, Bellevue is under the production pace needed to meet its 2035 growth target, and needs to grow at an annual rate of 1.3% to reach its remaining target by 2035.

### Residential Achieved Densities

| Zoned Density (du/acre) | | Gross Area (acres) | Critical Areas (acres) | Public Purpose (acres) | ROWs (acres) | Net Area (acres) | Total Units | Achieved Density (DU/acre) |
|---|---|---|---|---|---|---|---|---|
| Very Low | 0 - 4 du/acre | 67.1 | 10.3 | 0.9 | 1.1 | 54.7 | 120 | **2.2** |
| Low | 4 - 10 du/acre | 41.0 | 2.3 | 0.7 | 3.3 | 34.7 | 186 | **5.4** |
| Medium Low | 10 - 24 du/acre | 7.1 | 2.4 | 0.0 | 0.0 | 4.7 | 76 | **16.2** |
| Medium High | 24 - 48 du/acre | 64.9 | 0.9 | 0.0 | 0.0 | 63.9 | 1,560 | **24.4** |
| High | 48 & up du/acre | 14.6 | 0.0 | 0.0 | 0.0 | 14.6 | 2,278 | **155.5** |
| | **Total** | **194.7** | **15.9** | **1.7** | **4.4** | **172.7** | **4,220** | **24.4** |

| Achieved Density Level | Net Area (acres) | Total Units |
|---|---|---|
| Very Low | 54.7 | 120 |
| Low | 59.3 | 277 |
| Medium Low | 36.5 | 784 |
| Medium High | 0.0 | 0 |
| High | 22.1 | 3,039 |
| **Total** | **172.7** | **4,220** |

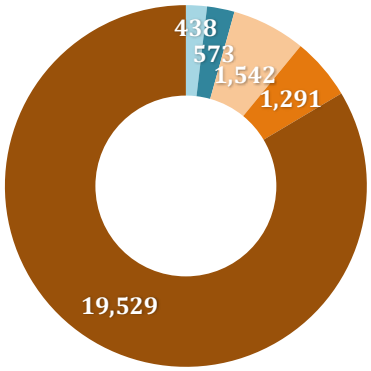


## Bellevue - Residential Land Supply and Capacity

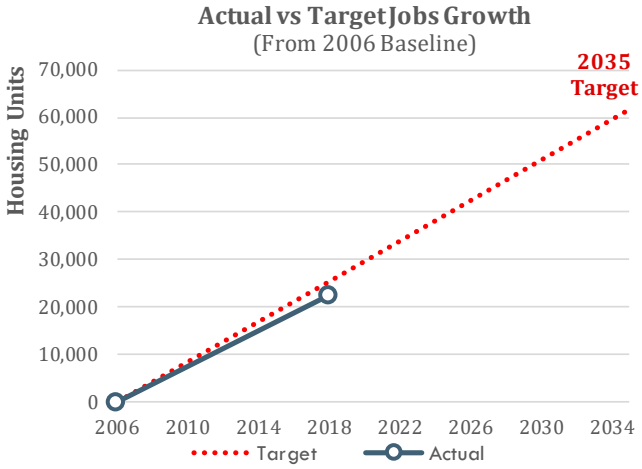
| Assumed Density Level | | Gross Acres | Critical Areas | Infrastructure Constrained Area | ROW & Public Purpose Discount | Market Factor (low/high) | Net Available Acres | Assumed Densities (low/high - units/acres) | Net Capacity (units) |
|---|---|---|---|---|---|---|---|---|---|
| **Very Low Density** | Land Supply | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% - 10.0% | 243.98 | 0.8 / 3.4 | **438** |
| **Low Density** | Land Supply | 0.00 | 0.00 | 0.00 | 0.00 | 10.0% - 10.0% | 137.65 | 6.6 | **573** |
| **Medium Low Density** | Land Supply | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% - 10.0% | 338.40 | 22.4 | **1,542** |
| **Medium High Density** | Land Supply | 0.00 | 0.00 | 0.00 | 0.00 | 10.0% - 15.0% | 152.19 | 30.0 | **1,291** |
| **High Density** | Land Supply | 0.00 | 0.00 | 0.00 | 0.00 | 0.0% - 10.0% | 318.06 | 303.0 | **19,529** |
| **All Zones** | **Total** | **0.00** | **0.00** | **0.00** | **0.00** | | **1,190.28** | | **23,375** |

| Capacity (units) | |
|---|---|
| Very Low Density Zones | 438 |
| Low Density Zones | 573 |
| Medium Low Density Zones | 1,542 |
| Medium High Density Zones | 1,291 |
| High Density Zones | 19,529 |
| *Capacity in Pipeline* | *3,484* |
| | |
| **Total Capacity (Units)** | **26,859** |
| Remaining Target (2018-2035) | 13,465 |
| **Surplus/Deficit Capacity (Units)** | **13,393** |

**Housing Capacity by Density Level** (units)



# Bellevue - Employment Growth and Commercial/Industrial Development Trends




| Bellevue Jobs Growth Target: 2006-2035 | 61,480 |
|---|---|
| 2006 Jobs (PSRC) | 120,494 |
| 2018 Jobs (PSRC) | 143,023 |
| **Total Jobs Growth** | **22,529** |
| **Remaining 2035 Target** | **38,951** |

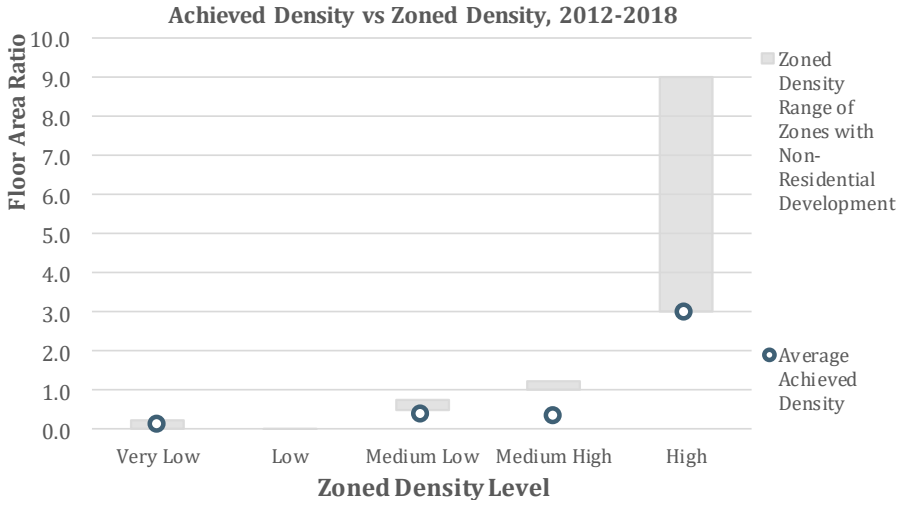
| % of Pace Needed to Achieve 2035 Jobs Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| **88.6%** | **1.56%** | **1.60%** |

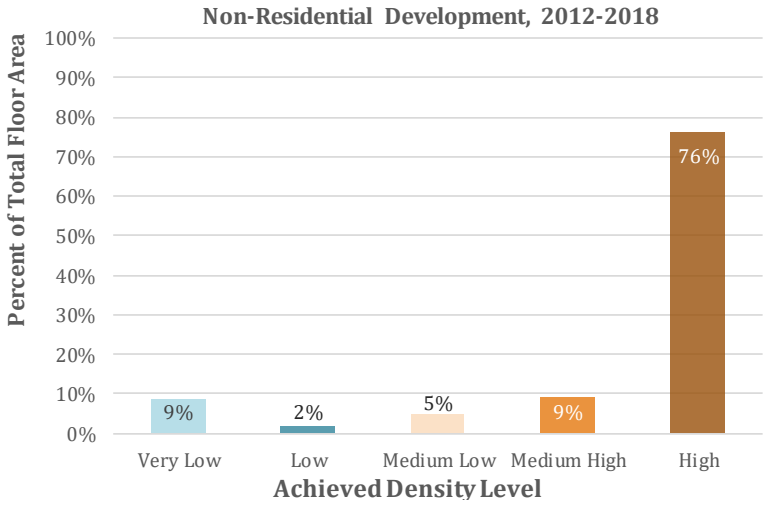
Since 2006, Bellevue has grown at 89% of the pace needed to achieve its 2035 jobs growth target of 61,480 units. During this period, the total number of jobs in Bellevue grew by roughly 19%. At this current rate, Bellevue is under the pace needed to meet its 2035 jobs growth target, and needs to grow at an annual rate of 1.6% to reach its remaining target by 2035.

## Non-Residential Achieved Densities

| Zoned Density (FAR) | | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|---|
| **Very Low** | 0 - 0.35 FAR | 1,661,282 | 200,888 | **0.1** |
| **Low** | 0.35 - 0.5 FAR | 0 | 0 | |
| **Medium Low** | 0.5 - 1.0 FAR | 504,925 | 179,905 | **0.4** |
| **Medium High** | 1.0 - 3.0 FAR | 1,348,453 | 412,671 | **0.3** |
| **High** | 3.0 & up FAR | 909,541 | 2,704,313 | **3.0** |
| | **Total** | **4,424,202** | **3,497,777** | **0.8** |

| Achieved Density Level | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|
| **Very Low** | 2,446,734 | 301,651 | **0.1** |
| **Low** | 168,421 | 60,828 | **0.4** |
| **Medium Low** | 454,922 | 163,610 | **0.4** |
| **Medium High** | 585,613 | 311,958 | **0.5** |
| **High** | 768,513 | 2,659,730 | **3.5** |
| **Total** | **4,424,202** | **3,497,777** | **0.8** |



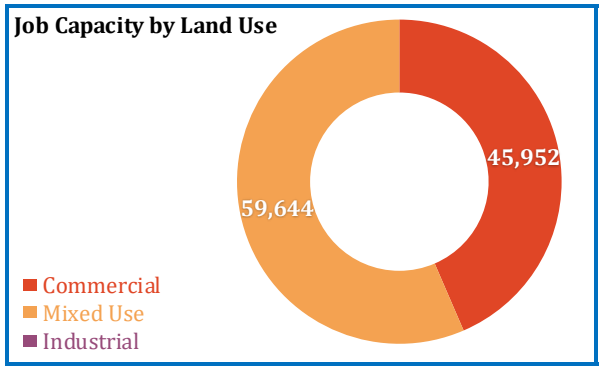



## Bellevue - Commercial/Industrial Land Supply and Job Capacity

| Land Supply | Gross Area (acres) | Critical Areas (acres) | ROWs (acres) | Public Purpose (acres) | Initial Land Supply | Market Factor | Buildable Area (acres) |
|---|---|---|---|---|---|---|---|
| **Vacant / Redev.** | | | | | | | |
| Commercial | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0% | 0.0 |
| Mixed Use | 79.2 | 0.0 | 0.0 | 0.0 | 79.2 | 10% | 71.3 |
| Industrial | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0% | 0.0 |
| **Non-Res Land Total** | **79.2** | **0.0** | **0.0** | **0.0** | **1317.6** | | **71.3** |

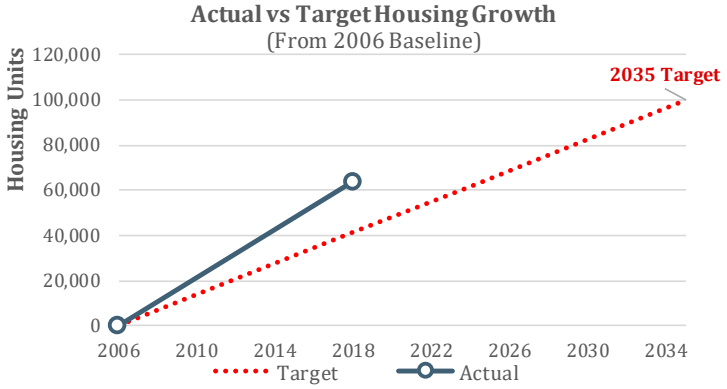
| Job Capacity by Land Use | Net Buildable Area (mil.sq.ft.) | Assumed Density Range (FAR) | Existing Floor Area (million sq.ft.) | Floor Area Capac (million sq.ft.) | Sq. ft. per Job | Job Capacity |
|---|---|---|---|---|---|---|
| **Commercial** | | | | | | |
| Subtotal | 16.07 | 0.26 / 9.90 | 3.26 | 14.38 | 300 / 444 | **45,952** |
| **Mixed-Use** | | | | | | |
| Mixed Use Total | 9.24 | 0.30 / 5.40 | 3.40 | 18.04 | 300 / 500 | **59,644** |
| **Industrial** | | | | | | |
| Industrial Total | 1.12 | 0.11 | 0.20 | 0.00 | 550 | **0** |
| **City Total** | | | | | | |
| Commercial | 16.07 | 0.26 / 9.90 | 0.69 | 14.38 | 300 / 444 | 45,952 |
| Mixed Use | 9.24 | 0.30 / 5.40 | 0.91 | 18.04 | 300 / 500 | 59,644 |
| Industrial | 1.12 | 0.11 | 0.26 | 0.00 | 550 | 0 |
| *Job Capacity in Pipeline* | | | | | | *11,645* |
| **City Total** | **26.43** | **9.90** | **1.86** | **32.42** | **550** | **117,241** |

| Job Capacity by Assumed Density Level | # | % |
|---|---|---|
| Very Low Density | 1,699 | 2% |
| Low Density | 1,694 | 2% |
| Medium Low Density | 5,056 | 5% |
| Medium High Density | 17,663 | 17% |
| High Density | 79,485 | 75% |
| | | |
| *Capacity in Pipeline* | | *11,645* |
| **Total Capacity (jobs)** | | **117,241** |
| Remaining Target (2018-2035) | | 38,951 |
| **Surplus/Deficit Capacity (jobs)** | | **78,290** |



# City of Seattle

## Housing Growth and Residential Development Trends




| Seattle Housing Growth Target: 2006-2035 | 99,760 |
|---|---|
| 2006 Estimated Housing Units | 292,881 |
| 2018 Estimated Housing Units | 356,556 |
| **Estimated Housing Growth** | **63,675** |
| Remaining 2035 Target | 36,085 |

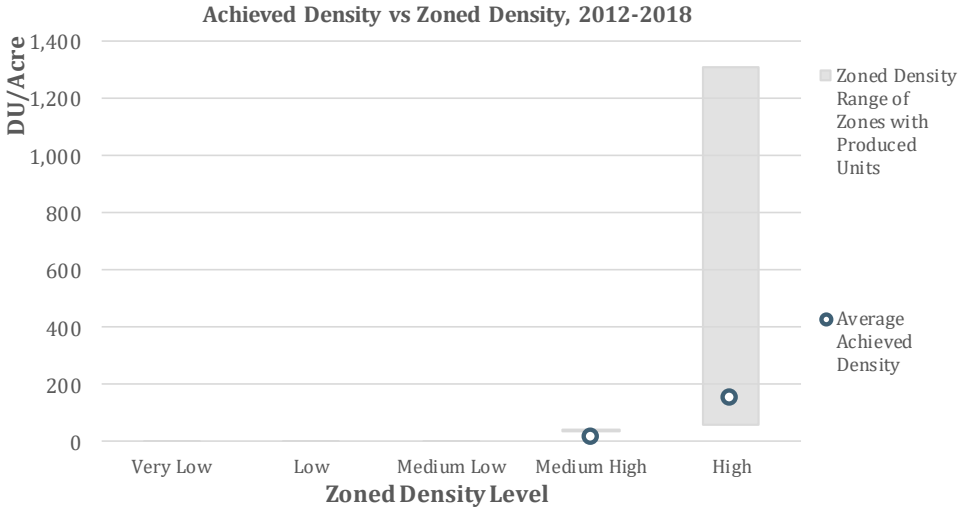
| % of Pace Needed to Achieve 2035 Housing Growth Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| 154.3% | 1.81% | 0.60% |

Since 2006, Seattle has grown at 154% of the pace needed to achieve its 2035 housing growth target of 99,760 units. During this period, the total number of housing units in Seattle grew by roughly 22%. At this current rate, Seattle is over the production pace needed to meet its 2035 growth target, and needs to grow at an annual rate of 0.6% to reach its remaining target by 2035.

### Residential Achieved Densities

| Zoned Density (du/acre) | | Gross Area (acres) | Critical Areas (acres) | Public Purpose (acres) | ROWs (acres) | Net Area (acres) | Total Units | Achieved Density (DU/acre) |
|---|---|---|---|---|---|---|---|---|
| Very Low | 0 - 4 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| Low | 4 - 10 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| Medium Low | 10 - 24 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| Medium High | 24 - 48 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 1.6 | 22 | **14.2** |
| High | 48 & up du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 304.1 | 45,833 | **150.7** |
| | **Total** | **0.0** | **0.0** | **0.0** | **0.0** | **305.7** | **45,855** | **150.0** |

| Achieved Density Level | Net Area (acres) | Total Units |
|---|---|---|
| Very Low | 0.0 | 0 |
| Low | 0.0 | 0 |
| Medium Low | 1.6 | 23 |
| Medium High | 68.5 | 2,706 |
| High | 235.6 | 43,126 |
| **Total** | **305.7** | **45,855** |

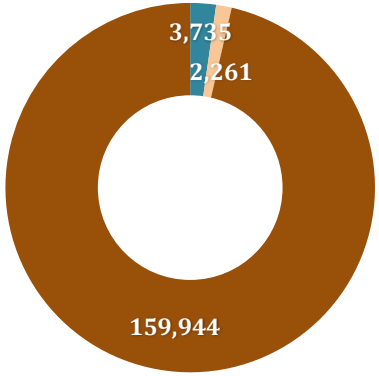


## Seattle - Residential Land Supply and Capacity

| Assumed Density Level | Vacant/ Redevelopable | Gross Acres* | Critical Areas and Infrastructure Deductions | Buildable Area (acres)* | Residential Split (low/high ) | Assumed Densities (low/high - FAR) | Market Factor (low/high) | Net Capacity (units) |
|---|---|---|---|---|---|---|---|---|
| **Very Low Density** | Vacant Subtotal | 0.0 | Not available for disaggregation | 0.0 | 0% | 0.0 | 0% | 0 |
| | Redev Subtotal | 0.0 | | 0.0 | 0% | 0.0 | 0% | 0 |
| | **Subtotal** | 0.0 | | | | | | **0** |
| **Low Density** (SF Zones) | Vacant Subtotal | 0.0 | Not available for disaggregation | 0.0 | 0% | Based on # of Dev. Sites | 0% | 0 |
| | Redev Subtotal | 1,283.9 | | 1,052.3 | 100% | | 20% - 35% | 3,735 |
| | **Subtotal** | 1,283.9 | | 1,052.3 | | | | **3,735** |
| **Medium Low Density** (RSV Zones) | Vacant Subtotal | 0.0 | Not available for disaggregation | 0.0 | 0% | 0.0 | 0% | 0 |
| | Redev Subtotal | 262.3 | | 251.5 | 100% | 0.8 | 10% - 40% | 2,261 |
| | **Subtotal** | 262.3 | | 251.5 | | | | **2,261** |
| **Medium High Density** | Vacant Subtotal | 0.0 | Not available for disaggregation | 0.0 | 0% | 0.0 | 0% | 0 |
| | Redev Subtotal | 0.0 | | 0.0 | 0% | 0.0 | 0% | 0 |
| | **Subtotal** | 0.0 | | 0.0 | | | | **0** |
| **High Density** | Vacant Subtotal | 577.8 | Not available for disaggregation | 506.6 | 0% - 100% | 0.4 / 30.0 | 10% - 40% | 4,813 |
| | Redev Subtotal | 2,085.2 | | 2,016.7 | 20% - 100% | 1.3 / 30.0 | 5% - 40% | 155,131 |
| | **Subtotal** | 2,663.0 | | 2,523.3 | | | | **159,944** |
| **All Zones** | Vacant Total | 577.8 | | 506.6 | | | | 4,813 |
| | Redev Total | 3,631.3 | | 3,320.4 | | | | 161,127 |
| | **Total** | **4,209.2** | | **3,827.0** | | | | **165,940** |

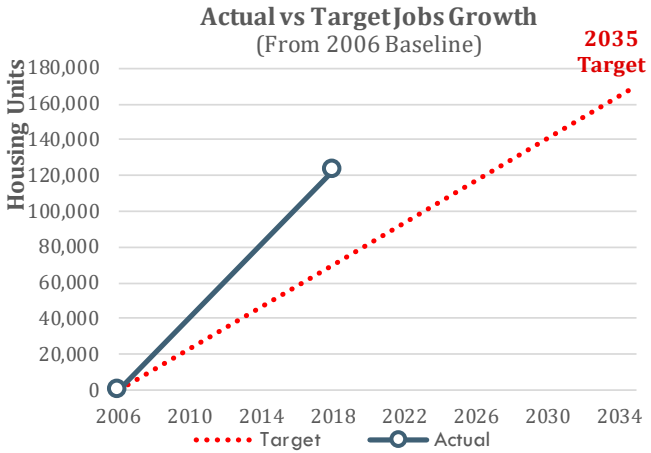
| Capacity (units) | |
|---|---|
| Very Low Density Zones | 0 |
| Low Density Zones | 3,735 |
| Medium Low Density Zones | 2,261 |
| Medium High Density Zones | 0 |
| High Density Zones | 159,944 |
| *Citywide ADU Capacity* | *6,500* |
| **Total Capacity (Units)** | **172,440** |
| Remaining Target (2018-2035) | 36,085 |
| **Surplus/Deficit Capacity (Units)** | **136,355** |

**Housing Capacity by Density Level** (units)




*Note: For Seattle, gross acres and buildable area in acres is the total for both residential and non-residential acres, due to the format data was provided.

# Seattle - Employment Growth and Commercial/Industrial Development Trends




| Seattle Jobs Growth Target: 2006-2035 | 170,172 |
|---|---|
| 2006 Jobs (PSRC) | 498,931 |
| 2018 Jobs (PSRC) | 622,121 |
| **Total Jobs Growth** | **123,190** |
| **Remaining 2035 Target** | **46,982** |

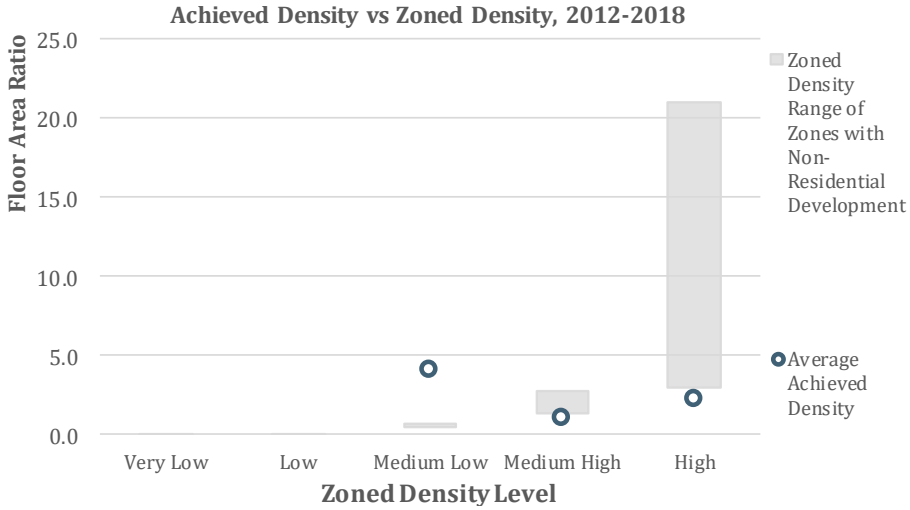
| % of Pace Needed to Achieve 2035 Jobs Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| **174.9%** | **2.06%** | **0.44%** |

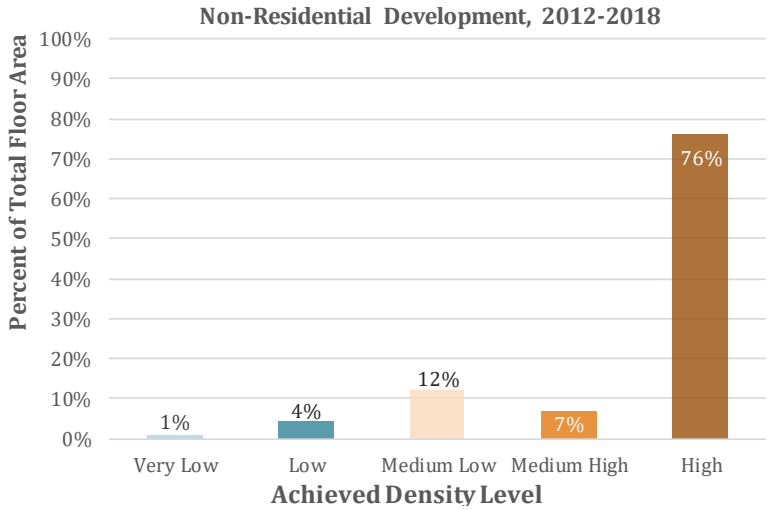
Since 2006, Seattle has grown at 175% of the pace needed to achieve its 2035 jobs growth target of 170,172 units. During this period, the total number of jobs in Seattle grew by roughly 25%. At this current rate, Seattle is over the pace needed to meet its 2035 jobs growth target, and needs to grow at an annual rate of 0.4% to reach its remaining target by 2035.

## Non-Residential Achieved Densities

| Zoned Density (FAR) | | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|---|
| **Very Low** | 0 - 0.35 FAR | 0 | 0 | |
| **Low** | 0.35 - 0.5 FAR | 0 | 0 | |
| **Medium Low** | 0.5 - 1.0 FAR | 86,380 | 355,885 | **4.1** |
| **Medium High** | 1.0 - 3.0 FAR | 2,362,278 | 2,306,095 | **1.0** |
| **High** | 3.0 & up FAR | 7,758,376 | 17,216,838 | **2.2** |
| | **Total** | **10,207,034** | **19,878,818** | **1.9** |

| Achieved Density Level | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|
| **Very Low** | 1,134,435 | 202,017 | **0.2** |
| **Low** | 1,998,886 | 842,833 | **0.4** |
| **Medium Low** | 3,899,050 | 2,373,226 | **0.6** |
| **Medium High** | 846,891 | 1,349,352 | **1.6** |
| **High** | 2,327,772 | 15,111,390 | **6.5** |
| **Total** | **10,207,034** | **19,878,818** | **1.9** |



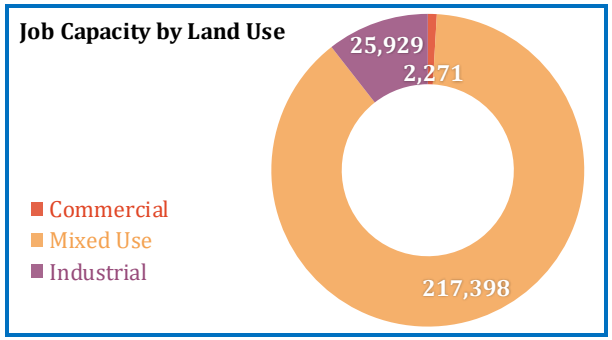
## Seattle - Commercial/Industrial Land Supply and Job Capacity

| Land Supply | Gross Area (acres)* | Critical Areas/ Infrastructure Deductions | Buildable Area (acres)* | Assumed Densities (low/high - FAR) | Potential New Floor Area (mil. sq. ft) | Non-Residential Split (low/high) | Market Factor | Initial Non-Res Capacity (sq. ft.) |
|---|---|---|---|---|---|---|---|---|
| **Vacant / Redev.** | | | | | | | | |
| Commercial | 3.9 | Not available for disaggregation | 3.9 | 2.00 / 30.00 | 0.96 | 20% - 100% | 10% - 40% | 962,374 |
| Mixed Use | 3,687.6 | | 3,370.1 | 0.75 / 30.00 | 372.95 | 0% - 100% | 5% - 40% | 102,759,477 |
| Industrial | 517.6 | | 453.1 | 0.40 / 2.75 | 25.51 | 100% | 25% | 25,390,784 |
| **Land Supply Total** | **4,209.2** | | **3,827.0** | | **399.43** | | **Non-Res Capacity:** | **129,112,635** |

*Note: For Seattle, gross acres and buildable area in acres is the total for both residential and non-residential acres, due to the format data was provided.

| Job Capacity by Land Use | Assumed Density Range (FAR) | Initial Non-Res Capacity (mil. sq ft.) | Existing Floor Area (million sq.ft.) | Floor Area Capac. (million sq.ft.) | Sq. ft. per Job (min/max) | Job Capacity |
|---|---|---|---|---|---|---|
| **Commercial** | | | | | | |
| Vacant | 0.00 | 0.00 | 0.00 | 0.00 | 0 | 0 |
| Redevelopable | 2.00 / 30.00 | 0.96 | 0.27 | 0.69 | 275 | 2,271 |
| **Commercial Total** | **2.00 / 30.00** | **0.96** | **0.27** | **0.69** | **275** | **2,271** |
| **Mixed-Use** | | | | | | |
| Vacant | 1.88 / 30.00 | 3.22 | 0.00 | 3.22 | 275 / 300 | 7,922 |
| Redevelopable | 0.75 / 30.00 | 99.54 | 21.44 | 78.10 | 300 | 209,476 |
| **Mixed Use Total** | **0.75 / 30.00** | **102.76** | **21.44** | **81.32** | **275 / 300** | **217,398** |
| **Industrial** | | | | | | |
| Vacant | 0.40 / 2.75 | 25.39 | 5.12 | 20.45 | 500 / 700 | 25,929 |
| Redevelopable | 0.00 | 0.00 | 0.00 | 0.00 | 0 | 0 |
| **Industrial Total** | **0.40 / 2.75** | **25.39** | **5.12** | **20.45** | **500 / 700** | **25,929** |
| **City Total** | | | | | | |
| Commercial | 2.00 / 30.00 | 1.0 | 0.27 | 0.69 | 275 | 2,271 |
| Mixed Use | 0.75 / 30.00 | 102.8 | 21.44 | 81.32 | 275 / 300 | 217,398 |
| Industrial | 0.40 / 2.75 | 25.4 | 5.12 | 20.45 | 500 / 700 | 25,929 |
| *Job Capacity in Pipeline* | | | | | | *none reported* |
| **City Total** | **0.00** | **129.11** | **26.83** | **102.46** | **275 / 700** | **245,598** |

| Job Capacity by Assumed Density Level | # | % |
|---|---|---|
| Very Low Density | 0 | 0% |
| Low Density | 0 | 0% |
| Medium Low Density | 0 | 0% |
| Medium High Density | 26,511 | 11% |
| High Density | 219,087 | 89% |
| *Capacity in Pipeline* | | *0* |
| **Total Capacity (jobs)** | | **245,598** |
| Remaining Target (2018-2035) | | 46,982 |
| **Surplus/Deficit Capacity (jobs)** | | **198,616** |

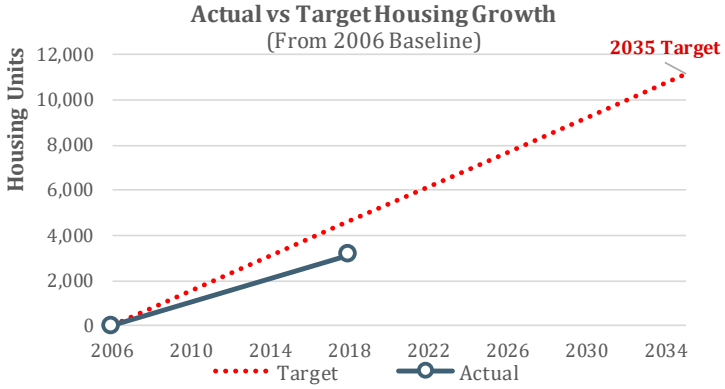


# Core Cities

City of Auburn
City of Bothell
City of Burien
City of Federal Way
City of Issaquah
City of Kent
City of Kirkland
City of Redmond
City of Renton
City of SeaTac
City of Tukwila

# City of Auburn

## Housing Growth and Residential Development Trends




| Auburn Housing Growth Target: 2006-2035 | 11,159 |
|---|---|
| 2006 Estimated Housing Units | 23,602 |
| 2018 Estimated Housing Units | 26,740 |
| **Estimated Housing Growth** | **3,138** |
| Remaining 2035 Target | 8,021 |

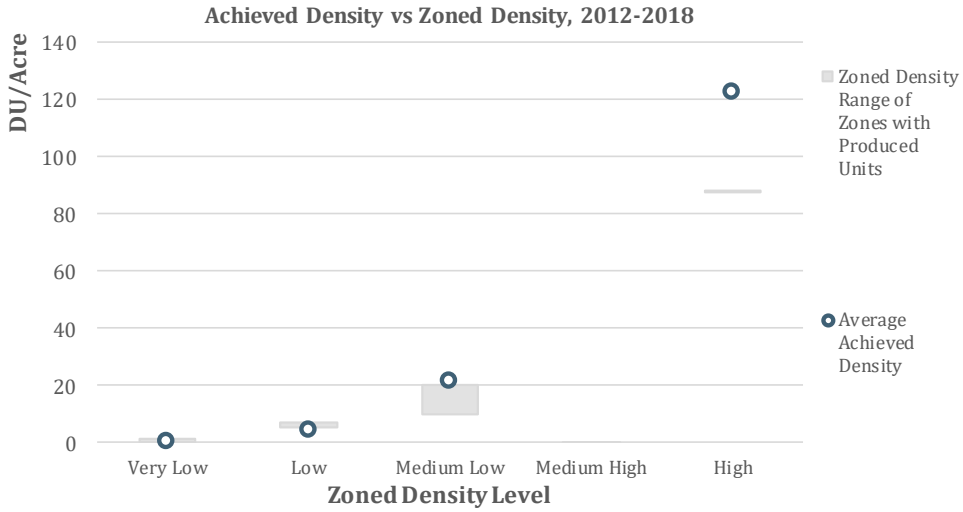
| % of Pace Needed to Achieve 2035 Housing Growth Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| 68.0% | 1.11% | 1.76% |

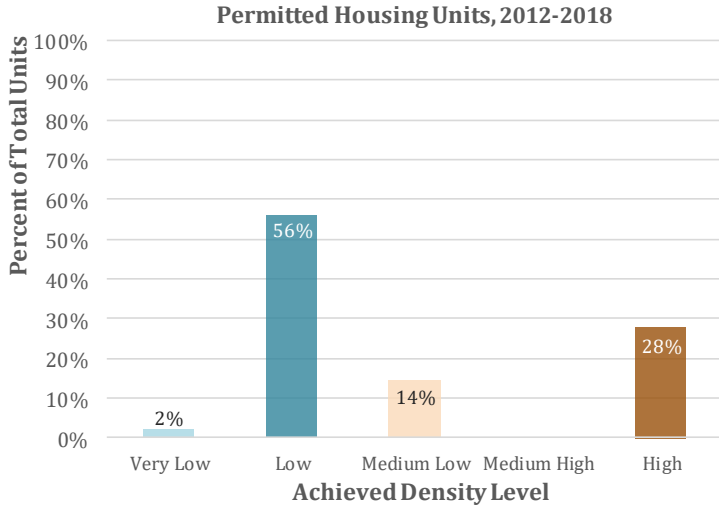
Since 2006, Auburn has grown at 68% of the pace needed to achieve its 2035 housing growth target of 11,159 units. During this period, the total number of housing units in Auburn grew by roughly 13%. At this current rate, Auburn is under the production pace needed to meet its 2035 growth target, and needs to grow at an annual rate of 1.8% to reach its remaining target by 2035.

### Residential Achieved Densities

| Zoned Density (du/acre) | | Gross Area (acres) | Critical Areas (acres) | Public Purpose (acres) | ROWs (acres) | Net Area (acres) | Total Units | Achieved Density (DU/acre) |
|---|---|---|---|---|---|---|---|---|
| Very Low | 0 - 4 du/acre | 173.6 | 0.0 | 0.0 | 0.0 | 173.6 | 5 | **0.0** |
| Low | 4 - 10 du/acre | 135.5 | 0.0 | 0.0 | 0.0 | 135.5 | 525 | **3.9** |
| Medium Low | 10 - 24 du/acre | 6.2 | 0.0 | 0.0 | 0.0 | 6.2 | 132 | **21.1** |
| Medium High | 24 - 48 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| High | 48 & up du/acre | 2.1 | 0.0 | 0.0 | 0.0 | 2.1 | 255 | **122.1** |
| | **Total** | **317.5** | **0.0** | **0.0** | **0.0** | **317.5** | **917** | **2.9** |

| Achieved Density Level | Net Area (acres) | Total Units |
|---|---|---|
| Very Low | 208.6 | 18 |
| Low | 117.1 | 512 |
| Medium Low | 6.2 | 132 |
| Medium High | 0.0 | 0 |
| High | 2.1 | 255 |
| **Total** | **334.0** | **917** |



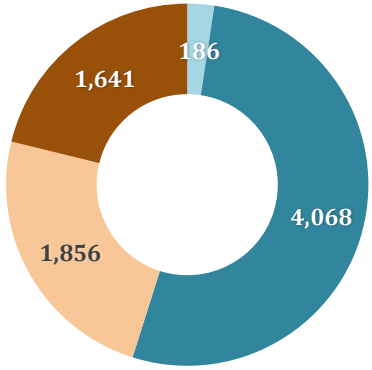



## Auburn - Residential Land Supply and Capacity

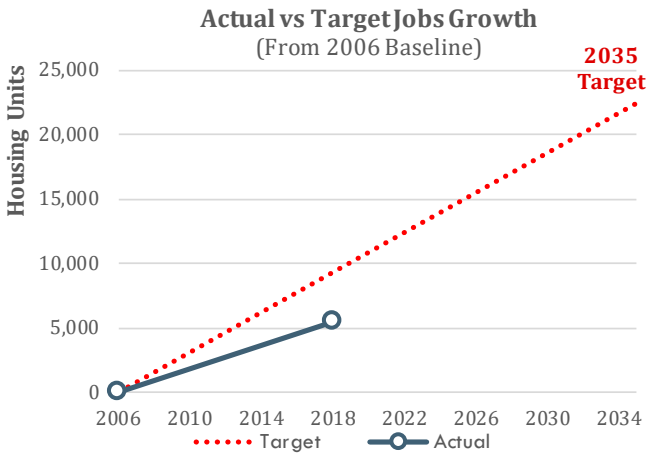
| Assumed Density Level | Vacant/ Redevelopable | Gross Acres | Critical Areas | Infrastructure Constrained Area | ROW & Public Purpose Discount | Market Factor (low/high) | Net Available Acres | Assumed Densities (low/high - units/acre) | Net Capacity (units) |
|---|---|---|---|---|---|---|---|---|---|
| Very Low Density | Vacant Subtotal | | | | 89.35 | 20.0% - 20.0% | 268.04 | 0.3 / 1.0 | 119 |
| | Redev Subtotal | | | | 114.76 | 20.0% - 20.0% | 344.27 | 0.3 / 1.0 | 67 |
| | **Subtotal** | 1,508.47 | 354.51 | 133.45 | 204.10 | | 612.31 | | **186** |
| Low Density | Vacant Subtotal | | | | 121.45 | 15.0% - 20.0% | 387.16 | 4.4 / 7.0 | 1,939 |
| | Redev Subtotal | | | | 183.49 | 15.0% - 20.0% | 589.17 | 4.4 / 7.0 | 2,129 |
| | **Subtotal** | 1,947.77 | 299.20 | 123.89 | 304.94 | | 976.33 | | **4,068** |
| Medium Low Density | Vacant Subtotal | | | | 11.06 | 5.0% - 20.0% | 64.56 | 10.0 / 21.1 | 1,009 |
| | Redev Subtotal | | | | 8.97 | 5.0% - 20.0% | 52.92 | 10.0 / 21.1 | 847 |
| | **Subtotal** | 368.92 | 212.31 | 0.67 | 20.04 | | 117.49 | | **1,856** |
| Medium High Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | | **0** |
| High Density | Vacant Subtotal | | | | 1.03 | 5.0% - 5.0% | 6.82 | 94.0 | 641 |
| | Redev Subtotal | | | | 1.61 | 5.0% - 5.0% | 10.65 | 94.0 | 1,000 |
| | **Subtotal** | 21.35 | 0.18 | 0.00 | 2.65 | | 17.47 | | **1,641** |
| All Zones | Vacant Total | | | | 222.89 | | 726.58 | | 3,708 |
| | Redev Total | | | | 308.83 | | 997.01 | | 4,043 |
| | **Total** | **3,846.51** | **866.20** | **258.01** | **531.72** | | **1,723.59** | | **7,751** |

| Capacity (units) | |
|---|---|
| Very Low Density Zones | 186 |
| Low Density Zones | 4,068 |
| Medium Low Density Zones | 1,856 |
| Medium High Density Zones | 0 |
| High Density Zones | 1,641 |
| *Capacity in Pipeline* | *1,400* |
| | |
| **Total Capacity (Units)** | **9,151** |
| Remaining Target (2018-2035) | 8,021 |
| **Surplus/Deficit Capacity (Units)** | **1,130** |

**Housing Capacity by Density Level** (units)



# Auburn - Employment Growth and Commercial/Industrial Development Trends




| Auburn Jobs Growth Target: 2006-2035 | 22,446 |
|---|---|
| 2006 Jobs (PSRC) | 38,252 |
| 2018 Jobs (PSRC) | 43,770 |
| **Total Jobs Growth** | **5,518** |
| **Remaining 2035 Target** | **16,928** |

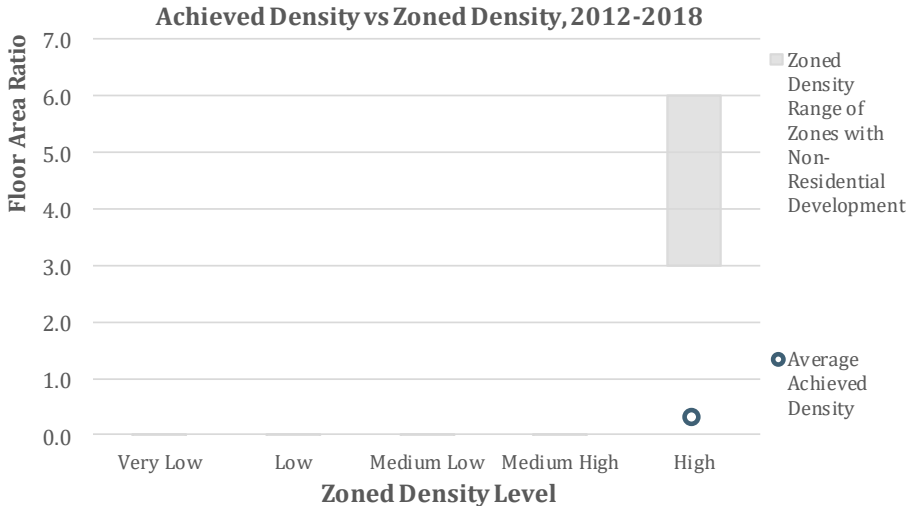
| % of Pace Needed to Achieve 2035 Jobs Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| **59.4%** | **1.20%** | **2.27%** |

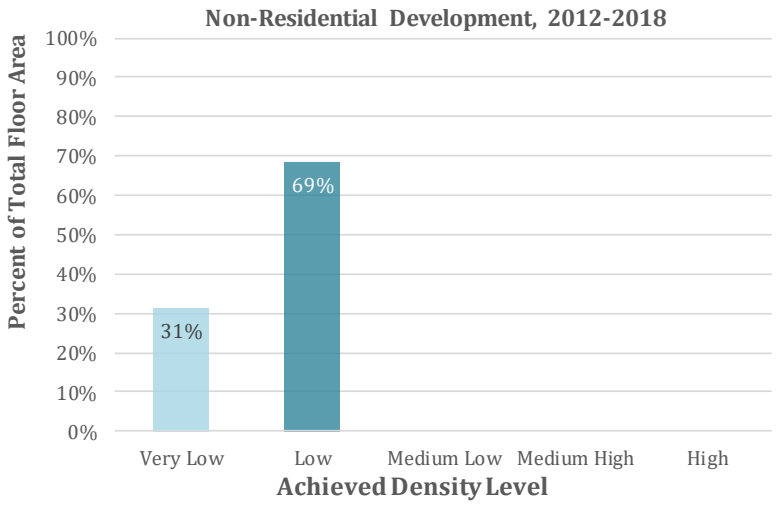
Since 2006, Auburn has grown at 59% of the pace needed to achieve its 2035 jobs growth target of 22,446 units. During this period, the total number of jobs in Auburn grew by roughly 14%. At this current rate, Auburn is under the pace needed to meet its 2035 jobs growth target, and needs to grow at an annual rate of 2.3% to reach its remaining target by 2035.

## Non-Residential Achieved Densities

| Zoned Density (FAR) | | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|---|
| **Very Low** | 0 - 0.35 FAR | 0 | 0 | |
| **Low** | 0.35 - 0.5 FAR | 0 | 0 | |
| **Medium Low** | 0.5 - 1.0 FAR | 0 | 0 | |
| **Medium High** | 1.0 - 3.0 FAR | 0 | 0 | |
| **High** | 3.0 & up FAR | 1,435,270 | 400,061 | **0.3** |
| | **Total** | **1,435,270** | **400,061** | **0.3** |

| Achieved Density Level | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|
| **Very Low** | 766,494 | 125,804 | **0.2** |
| **Low** | 668,776 | 274,257 | **0.4** |
| **Medium Low** | 0 | 0 | **0.0** |
| **Medium High** | 0 | 0 | **0.0** |
| **High** | 0 | 0 | **0.0** |
| **Total** | **1,435,270** | **400,061** | **0.3** |



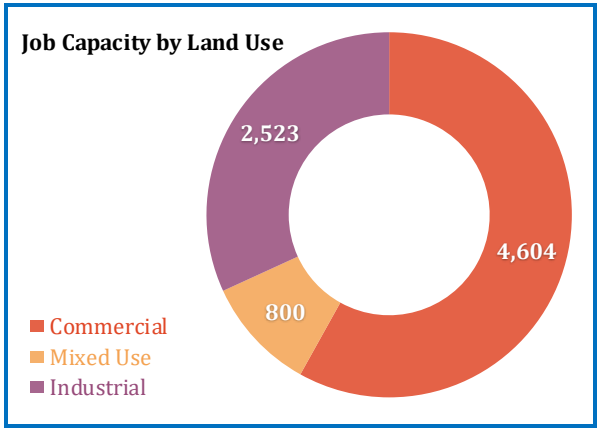



## Auburn - Commercial/Industrial Land Supply and Job Capacity

| Land Supply | Gross Area (acres) | Critical Areas (acres) | ROWs (acres) | Public Purpose (acres) | Initial Land Supply | Market Factor | Buildable Area (acres) |
|---|---|---|---|---|---|---|---|
| **Vacant / Redev.** | | | | | | | |
| Commercial | 420.4 | 93.2 | 16.4 | 24.5 | 286.3 | 15% | 237.2 |
| Mixed Use | 152.6 | 113.3 | 2.0 | 2.9 | 34.4 | 5% | 32.4 |
| Industrial | 718.2 | 362.8 | 17.8 | 26.7 | 310.9 | 8% | 282.5 |
| **Non-Res Land Total** | **1291.1** | **569.4** | **36.1** | **54.1** | **631.5** | | **552.1** |

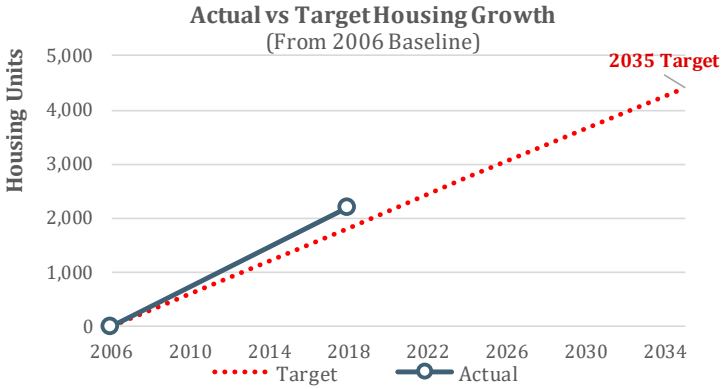
| Job Capacity by Land Use | Net Buildable Area (mil.sq.ft.) | Assumed Density Range (FAR) | Existing Floor Area (million sq.ft.) | Floor Area Capac. (million sq.ft.) | Sq. ft. per Job | Job Capacity |
|---|---|---|---|---|---|---|
| **Commercial** | | | | | | |
| Vacant | 5.19 | 0.25 | 0.00 | 1.30 | 375 / 400 | 3,270 |
| Redevelopable | 5.14 | 0.25 | 0.76 | 0.53 | 375 / 400 | 1334 |
| **Commercial Total** | **10.33** | **0.25** | **0.76** | **1.83** | **375 / 400** | **4,604** |
| **Mixed-Use** | | | | | | |
| Vacant | 0.95 | 0.25 / 0.37 | 0.00 | 0.33 | 400 / 1000 | 531 |
| Redevelopable | 0.46 | 0.25 / 0.37 | 0.06 | 0.11 | 400 / 1000 | 268 |
| **Mixed Use Total** | **1.41** | **0.25 / 0.37** | **0.06** | **0.44** | **400 / 1000** | **800** |
| **Industrial** | | | | | | |
| Vacant | 6.71 | 0.07 / 0.41 | 0.00 | 1.63 | 1,000 | 1,631 |
| Redevelopable | 5.60 | 0.07 / 0.41 | 0.29 | 0.89 | 1,000 | 892 |
| **Industrial Total** | **12.31** | **0.07 / 0.41** | **0.29** | **2.52** | **1,000** | **2,523** |
| **City Total** | | | | | | |
| Commercial | 10.33 | 0.25 | 0.69 | 1.83 | 375 / 400 | 4,604 |
| Mixed Use | 1.41 | 0.25 / 0.37 | 0.91 | 0.44 | 400 / 1000 | 800 |
| Industrial | 12.31 | 0.07 / 0.41 | 0.26 | 2.52 | 1,000 | 2,523 |
| *Job Capacity in Pipeline* | | | | | | *0* |
| **City Total** | **24.05** | **0.07 / 0.41** | **1.86** | **4.79** | **375 / 1000** | **7,927** |

| Job Capacity by Assumed Density Level | # | % |
|---|---|---|
| Very Low Density | 4,877 | 62% |
| Low Density | 3,050 | 38% |
| Medium Low Density | 0 | 0% |
| Medium High Density | 0 | 0% |
| High Density | 0 | 0% |
| | | |
| *Capacity in Pipeline* | | *0* |
| **Total Capacity (jobs)** | | **7,927** |
| Remaining Target (2018-2035) | | 16,928 |
| **Surplus/Deficit Capacity (jobs)** | | **-9,001** |



# City of Bothell

## Housing Growth and Residential Development Trends




| Bothell Housing Growth Target: 2006-2035 | 4,420 |
|---|---|
| 2006 Estimated Housing Units | 9,522 |
| 2018 Estimated Housing Units | 11,726 |
| **Estimated Housing Growth** | **2,204** |
| Remaining 2035 Target | 2,216 |

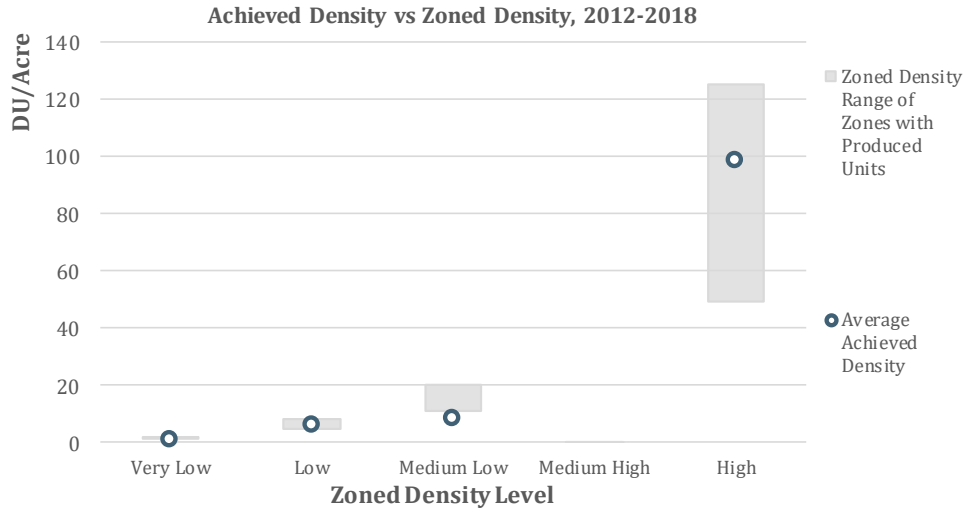
| % of Pace Needed to Achieve 2035 Housing Growth Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| 120.5% | 1.93% | 1.11% |

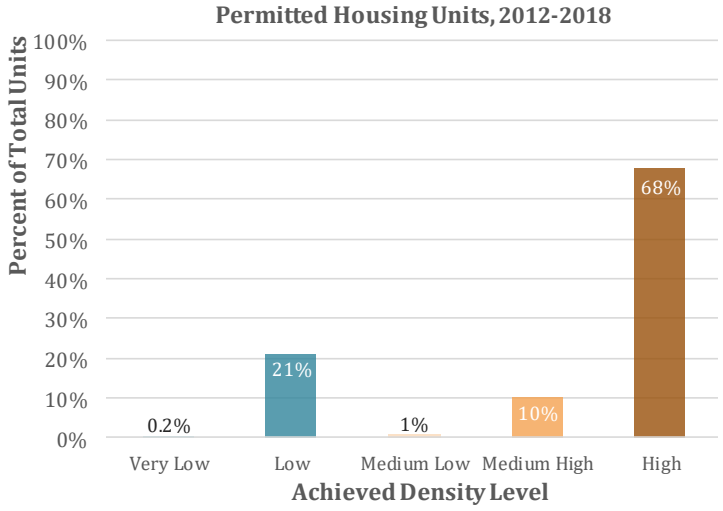
Since 2006, Bothell has grown at 121% of the pace needed to achieve its 2035 housing growth target of 4,420 units. During this period, the total number of housing units in Bothell grew by roughly 23%. At this current rate, Bothell is over the production pace needed to meet its 2035 growth target, and needs to grow at an annual rate of 1.1% to reach its remaining target by 2035.

### Residential Achieved Densities

| Zoned Density (du/acre) | | Gross Area (acres) | Critical Areas (acres) | Public Purpose (acres) | ROWs (acres) | Net Area (acres) | Total Units | Achieved Density (DU/acre) |
|---|---|---|---|---|---|---|---|---|
| Very Low | 0 - 4 du/acre | 1.6 | 0.0 | 0.0 | 0.0 | 1.6 | 1 | **0.6** |
| Low | 4 - 10 du/acre | 179.1 | 43.2 | 0.0 | 19.7 | 116.2 | 670 | **5.8** |
| Medium Low | 10 - 24 du/acre | 6.3 | 0.2 | 0.0 | 0.0 | 6.1 | 49 | **8.1** |
| Medium High | 24 - 48 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| High | 48 & up du/acre | 20.9 | 0.0 | 1.7 | 0.5 | 18.7 | 1,836 | **98.1** |
| | **Total** | **207.9** | **43.5** | **1.7** | **20.2** | **142.5** | **2,556** | **17.9** |

| Achieved Density Level | Net Area (acres) | Total Units |
|---|---|---|
| Very Low | 3.7 | 6 |
| Low | 112.6 | 535 |
| Medium Low | 1.6 | 22 |
| Medium High | 9.5 | 260 |
| High | 15.1 | 1,733 |
| **Total** | **142.5** | **2,556** |



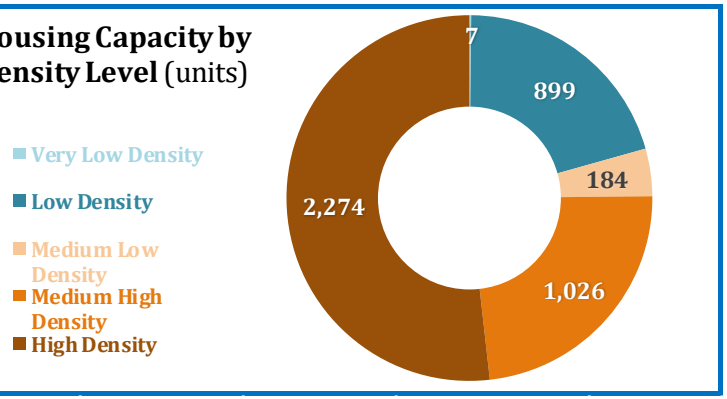



## Bothell - Residential Land Supply and Capacity

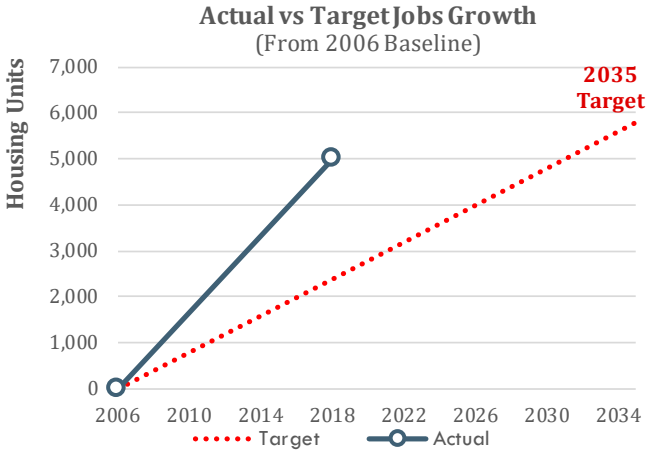
| Assumed Density Level | Vacant/ Redevelopable | Gross Acres | Critical Areas | Infrastructure Constrained Area | ROW & Public Purpose Discount | Market Factor (low/high) | Net Available Acres | Assumed Densities (low/high - units/acre) | Net Capacity (units) |
|---|---|---|---|---|---|---|---|---|---|
| Very Low Density | Vacant Subtotal | | | | 5.39 | 1.0% - 3.0% | 10.03 | 3.1 | 7 |
| | Redev Subtotal | | | | 1.20 | 1.0% - 3.0% | 2.81 | 3.1 | 0 |
| | **Subtotal** | 34.07 | 13.33 | 0.00 | 6.58 | | 12.85 | | **7** |
| Low Density | Vacant Subtotal | | | | 42.64 | 3.0% - 5.0% | 77.45 | 4.3 / 8.0 | 392 |
| | Redev Subtotal | | | | 71.22 | 3.0% - 5.0% | 126.99 | 4.3 / 8.0 | 508 |
| | **Subtotal** | 376.01 | 47.71 | 0.00 | 113.86 | | 204.45 | | **899** |
| Medium Low Density | Vacant Subtotal | | | | 0.75 | 3.0% - 5.0% | 2.14 | 13.3 / 23.9 | 33 |
| | Redev Subtotal | | | | 3.51 | 3.0% - 5.0% | 9.78 | 13.3 / 23.9 | 151 |
| | **Subtotal** | 24.14 | 7.43 | 0.00 | 4.26 | | 11.92 | | **184** |
| Medium High Density | Vacant Subtotal | | | | 4.47 | 3.0% - 3.0% | 12.88 | 25.0 / 34.0 | 407 |
| | Redev Subtotal | | | | 7.17 | 3.0% - 3.0% | 20.66 | 25.0 / 34.0 | 620 |
| | **Subtotal** | 64.35 | 17.77 | 0.00 | 11.65 | | 33.54 | | **1,026** |
| High Density | Vacant Subtotal | | | | 3.22 | 3.0% - 3.0% | 9.27 | 66.3 / 192.4 | 1,271 |
| | Redev Subtotal | | | | 3.43 | 3.0% - 3.0% | 9.89 | 66.3 / 192.4 | 1,003 |
| | **Subtotal** | 30.11 | 3.50 | 0.00 | 6.65 | | 19.16 | | **2,274** |
| All Zones | Vacant Total | | | | 56.47 | | 111.78 | | 2,109 |
| | Redev Total | | | | 86.53 | | 170.13 | | 2,282 |
| | **Total** | **528.68** | **89.74** | **0.00** | **143.00** | | **281.91** | | **4,391** |

| Capacity (units) | |
|---|---|
| Very Low Density Zones | 7 |
| Low Density Zones | 899 |
| Medium Low Density Zones | 184 |
| Medium High Density Zones | 1,026 |
| High Density Zones | 2,274 |
| *Capacity in Pipeline* | *1,979* |
| | |
| **Total Capacity (Units)** | **6,370** |
| Remaining Target (2018-2035) | 2,216 |
| **Surplus/Deficit Capacity (Units)** | **4,154** |

**Housing Capacity by Density Level** (units)



# Bothell - Employment Growth and Commercial/Industrial Development Trends




| Bothell Jobs Growth Target: 2006-2035 | 5,800 |
|---|---|
| 2006 Jobs (PSRC) | 11,757 |
| 2018 Jobs (PSRC) | 16,780 |
| **Total Jobs Growth** | **5,023** |
| **Remaining 2035 Target** | **777** |

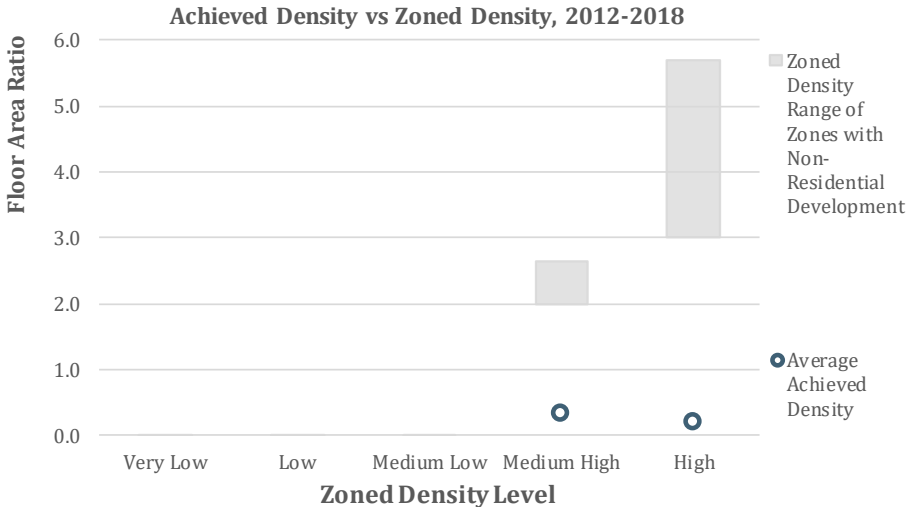
| % of Pace Needed to Achieve 2035 Jobs Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| **209.3%** | **3.56%** | **0.27%** |

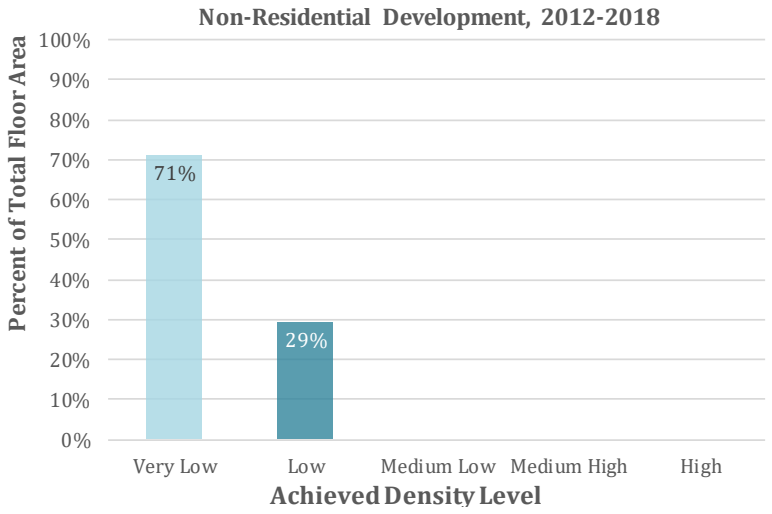
Since 2006, Bothell has grown at 209% of the pace needed to achieve its 2035 jobs growth target of 5,800 units. During this period, the total number of jobs in Bothell grew by roughly 43%. At this current rate, Bothell is over the pace needed to meet its 2035 jobs growth target, and needs to grow at an annual rate of 0.3% to reach its remaining target by 2035.

## Non-Residential Achieved Densities

| Zoned Density (FAR) | | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|---|
| **Very Low** | 0 - 0.35 FAR | 0 | 0 | |
| **Low** | 0.35 - 0.5 FAR | 0 | 0 | |
| **Medium Low** | 0.5 - 1.0 FAR | 0 | 0 | |
| **Medium High** | 1.0 - 3.0 FAR | 17,550 | 5,592 | **0.3** |
| **High** | 3.0 & up FAR | 634,620 | 121,751 | **0.2** |
| | **Total** | **652,170** | **127,343** | **0.2** |

| Achieved Density Level | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|
| **Very Low** | 551,332 | 90,251 | **0.2** |
| **Low** | 100,838 | 37,092 | **0.4** |
| **Medium Low** | 0 | 0 | **0.0** |
| **Medium High** | 0 | 0 | **0.0** |
| **High** | 0 | 0 | **0.0** |
| **Total** | **652,170** | **127,343** | **0.2** |



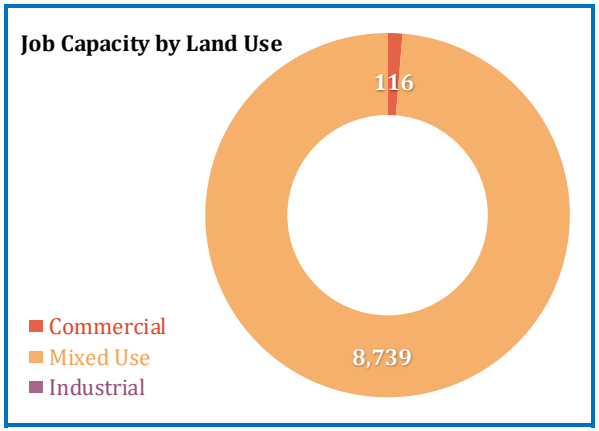



## Bothell - Commercial/Industrial Land Supply and Job Capacity

| Land Supply | Gross Area (acres) | Critical Areas (acres) | ROWs (acres) | Public Purpose (acres) | Initial Land Supply | Market Factor | Buildable Area (acres) |
|---|---|---|---|---|---|---|---|
| **Vacant / Redev.** | | | | | | | |
| Commercial | 6.5 | 2.6 | 0.6 | 0.4 | 2.9 | 5% - 10% | 2.7 |
| Mixed Use | 159.4 | 57.2 | 15.3 | 10.2 | 76.6 | 1% - 5% | 71.7 |
| Industrial | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0% | 0.0 |
| **Non-Res Land Total** | **165.9** | **59.9** | **15.9** | **10.6** | **79.5** | | **74.3** |

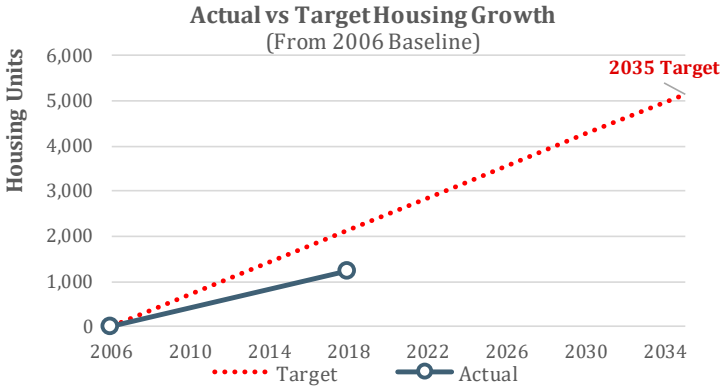
| Job Capacity by Land Use | Net Buildable Area (mil.sq.ft.) | Assumed Density Range (FAR) | Existing Floor Area (million sq.ft.) | Floor Area Capac. (million sq.ft.) | Sq. ft. per Job | Job Capacity |
|---|---|---|---|---|---|---|
| **Commercial** | | | | | | |
| Vacant | 0.02 | 0.35 / 0.40 | 0.00 | 0.01 | 200 | 47 |
| Redevelopable | 0.09 | 0.35 / 0.40 | 0.07 | 0.01 | 200 | 69 |
| **Commercial Total** | **0.12** | **0.35 / 0.40** | **0.07** | **0.02** | **200** | **116** |
| **Mixed-Use** | | | | | | |
| Vacant | 1.37 | 0.10 / 1.20 | 0.00 | 0.83 | 200 / 1000 | 4,137 |
| Redevelopable | 1.76 | 0.10 / 1.20 | 0.10 | 0.92 | 200 / 1000 | 4602 |
| **Mixed Use Total** | **3.12** | **0.10 / 1.20** | **0.10** | **1.75** | **200 / 1000** | **8,739** |
| **Industrial** | | | | | | |
| Vacant | 0.00 | 0.00 | 0.00 | 0.00 | 0 | 0 |
| Redevelopable | 0.00 | 0.00 | 0.00 | 0.00 | 0 | 0 |
| **Industrial Total** | **0.00** | **0.00** | **0.00** | **0.00** | **0** | **0** |
| **City Total** | | | | | | |
| Commercial | 0.12 | 0.35 / 0.40 | 0.69 | 0.02 | 200 | 116 |
| Mixed Use | 3.12 | 0.10 / 1.20 | 0.91 | 1.75 | 200 / 1000 | 8,739 |
| Industrial | 0.00 | 0.00 | 0.26 | 0.00 | 0 | 0 |
| *Job Capacity in Pipeline* | | | | | | *160* |
| **City Total** | **3.24** | **1.20** | **1.86** | **1.77** | **0 / 1000** | **9,015** |

| Job Capacity by Assumed Density Level | # | % |
|---|---|---|
| Very Low Density | 225 | 3% |
| Low Density | 2,605 | 29% |
| Medium Low Density | 540 | 6% |
| Medium High Density | 5,485 | 62% |
| High Density | 0 | 0% |
| | | |
| *Capacity in Pipeline* | | *160* |
| **Total Capacity (jobs)** | | **9,015** |
| Remaining Target (2018-2035) | | 777 |
| **Surplus/Deficit Capacity (jobs)** | | **8,238** |



# City of Burien

## Housing Growth and Residential Development Trends




| | |
|---|---|
| **Burien Housing Growth Target: 2006-2035** | **5,150** |
| 2006 Estimated Housing Units | 19,584 |
| 2018 Estimated Housing Units | 20,809 |
| **Estimated Housing Growth** | **1,225** |
| **Remaining 2035 Target** | **3,926** |

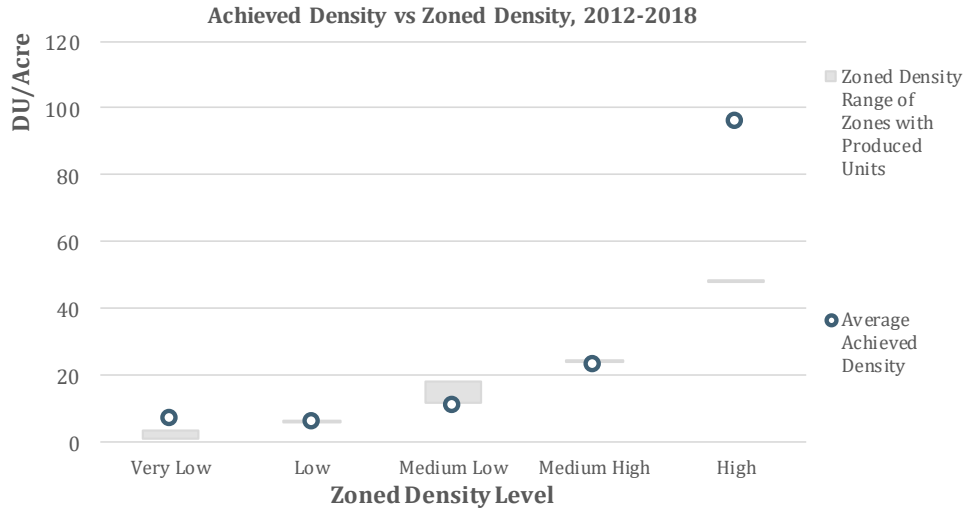
| % of Pace Needed to Achieve 2035 Housing Growth Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| **57.5%** | **0.52%** | **1.11%** |

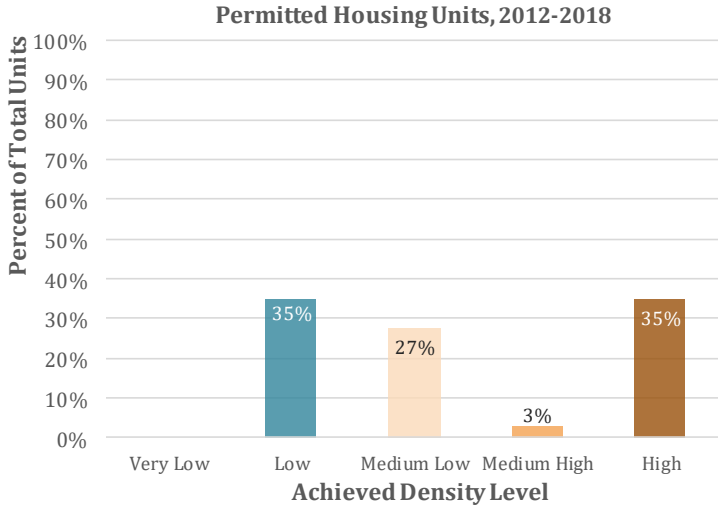
Since 2006, Burien has grown at 57% of the pace needed to achieve its 2035 housing growth target of 5,150 units. During this period, the total number of housing units in Burien grew by roughly 6%. At this current rate, Burien is under the production pace needed to meet its 2035 growth target, and needs to grow at an annual rate of 1.1% to reach its remaining target by 2035.

### Residential Achieved Densities

| Zoned Density (du/acre) | | Gross Area (acres) | Critical Areas (acres) | Public Purpose (acres) | ROWs (acres) | Net Area (acres) | Total Units | Achieved Density (DU/acre) |
|---|---|---|---|---|---|---|---|---|
| **Very Low** | 0 - 4 du/acre | 17.6 | 12.5 | 0.0 | 0.2 | 4.8 | 33 | **6.9** |
| **Low** | 4 - 10 du/acre | 58.3 | 0.0 | 0.5 | 2.1 | 55.6 | 323 | **5.8** |
| **Medium Low** | 10 - 24 du/acre | 5.7 | 0.0 | 0.0 | 0.0 | 5.7 | 63 | **11.0** |
| **Medium High** | 24 - 48 du/acre | 9.9 | 0.4 | 0.0 | 0.1 | 9.4 | 216 | **23.1** |
| **High** | 48 & up du/acre | 4.0 | 0.0 | 0.0 | 0.0 | 4.0 | 381 | **95.6** |
| | **Total** | **95.5** | **13.0** | **0.6** | **2.5** | **79.5** | **1,016** | **12.8** |

| Achieved Density Level | Net Area (acres) | Total Units |
|---|---|---|
| **Very Low** | 0.0 | 0 |
| **Low** | 60.4 | 356 |
| **Medium Low** | 15.1 | 279 |
| **Medium High** | 1.1 | 27 |
| **High** | 2.9 | 354 |
| **Total** | **79.5** | **1,016** |



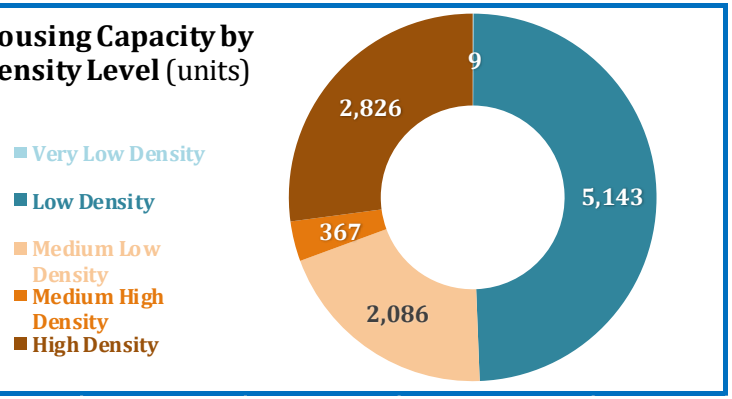



## Burien - Residential Land Supply and Capacity

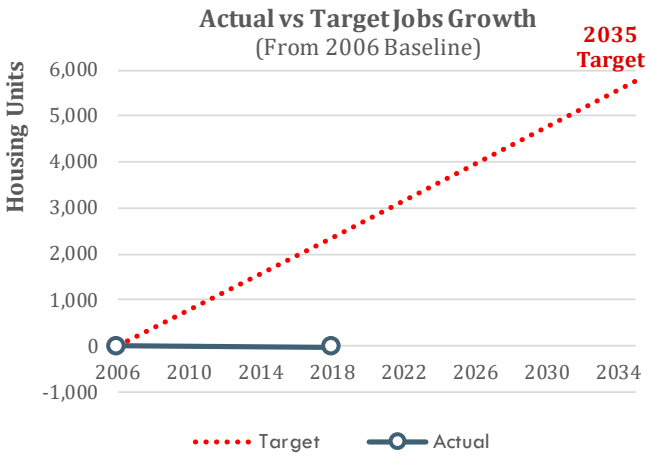
| Assumed Density Level | Vacant/ Redevelopable | Gross Acres | Critical Areas | Infrastructure Constrained Area | ROW & Public Purpose Discount | Market Factor (low/high) | Net Available Acres | Assumed Densities (low/high - units/acre) | Net Capacity (units) |
|---|---|---|---|---|---|---|---|---|---|
| Very Low Density | Vacant Subtotal | | | | 1.23 | 18.0% - 18.0% | 7.17 | 1.0 | 7 |
| | Redev Subtotal | | | | 0.54 | 20.0% - 20.0% | 3.03 | 1.0 | 2 |
| | **Subtotal** | 15.23 | 0.53 | 0.00 | 1.76 | | 10.20 | | **9** |
| Low Density | Vacant Subtotal | | | | 15.33 | 16.0% - 30.0% | 92.35 | 5.6 / 8.0 | 946 |
| | Redev Subtotal | | | | 52.01 | 17.0% - 32.0% | 308.91 | 5.6 / 8.0 | 4,196 |
| | **Subtotal** | 1,276.66 | 712.44 | 0.00 | 67.34 | | 401.26 | | **5,143** |
| Medium Low Density | Vacant Subtotal | | | | 2.21 | 22.0% - 31.0% | 37.90 | 10.8 / 23.0 | 721 |
| | Redev Subtotal | | | | 4.97 | 24.0% - 32.0% | 82.12 | 10.8 / 23.0 | 1,365 |
| | **Subtotal** | 204.58 | 29.80 | 0.00 | 7.17 | | 120.01 | | **2,086** |
| Medium High Density | Vacant Subtotal | | | | 0.16 | 30.0% - 31.0% | 2.60 | 24.0 / 25.7 | 66 |
| | Redev Subtotal | | | | 0.98 | 32.0% - 33.0% | 15.58 | 24.0 / 25.7 | 301 |
| | **Subtotal** | 28.87 | 0.54 | 0.00 | 1.13 | | 18.18 | | **367** |
| High Density | Vacant Subtotal | | | | 0.60 | 31.0% - 100.0% | 2.47 | 120.7 | 349 |
| | Redev Subtotal | | | | 1.33 | 32.0% - 100.0% | 20.91 | 120.7 | 2,477 |
| | **Subtotal** | 50.50 | 7.05 | 0.00 | 1.93 | | 23.38 | | **2,826** |
| All Zones | Vacant Total | | | | 19.52 | | 142.49 | | 2,089 |
| | Redev Total | | | | 59.82 | | 430.54 | | 8,341 |
| | **Total** | **1,575.84** | **750.36** | **0.00** | **79.34** | | **573.03** | | **10,431** |

| Capacity (units) | |
|---|---|
| Very Low Density Zones | 9 |
| Low Density Zones | 5,143 |
| Medium Low Density Zones | 2,086 |
| Medium High Density Zones | 367 |
| High Density Zones | 2,826 |
| *Capacity in Pipeline* | *385* |
| **Total Capacity (Units)** | **10,816** |
| Remaining Target (2018-2035) | 3,926 |
| **Surplus/Deficit Capacity (Units)** | **6,890** |

**Housing Capacity by Density Level** (units)



# Burien - Employment Growth and Commercial/Industrial Development Trends




| Burien Jobs Growth Target: 2006-2035 | 5,754 |
|---|---|
| 2006 Jobs (PSRC) | 13,371 |
| 2018 Jobs (PSRC) | 13,345 |
| **Total Jobs Growth** | **-26** |
| **Remaining 2035 Target** | **5,780** |

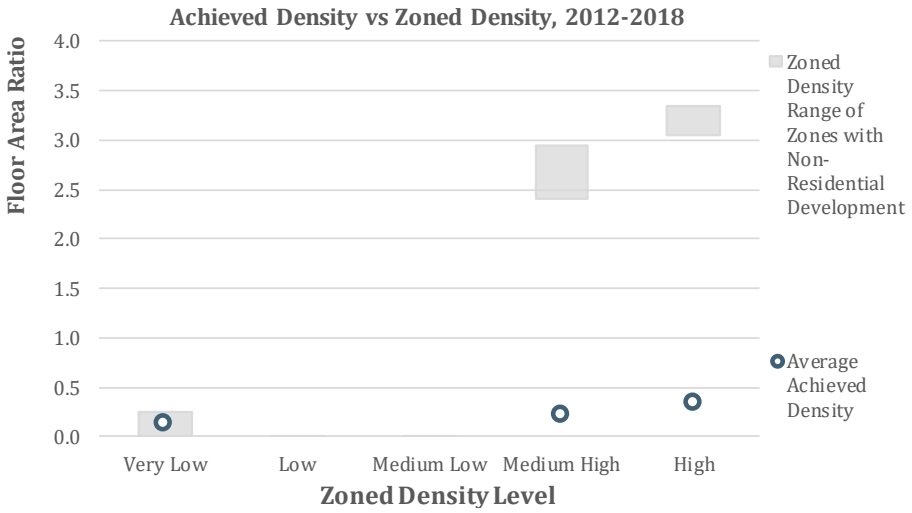
| % of Pace Needed to Achieve 2035 Jobs Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| **-1.1%** | **-0.02%** | **2.55%** |

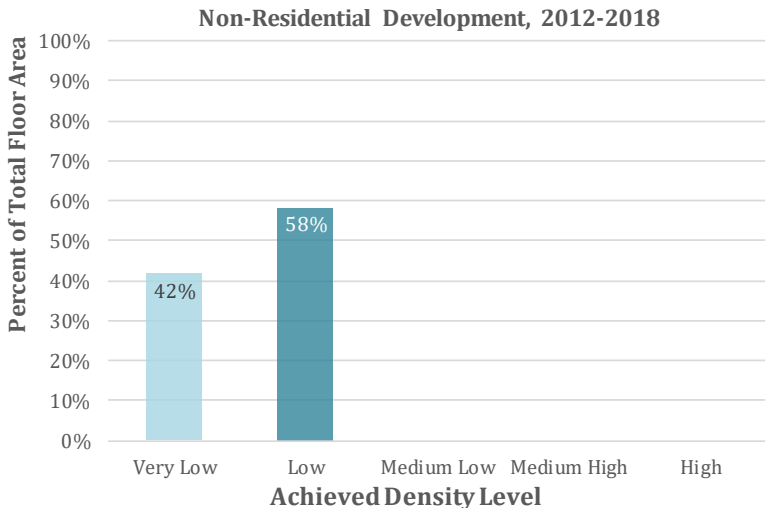
Since 2006, Burien has grown at -1% of the pace needed to achieve its 2035 jobs growth target of 5,754 units. During this period, the total number of jobs in Burien grew by roughly 0%. At this current rate, Burien is under the pace needed to meet its 2035 jobs growth target, and needs to grow at an annual rate of 2.5% to reach its remaining target by 2035.

## Non-Residential Achieved Densities

| Zoned Density (FAR) | | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|---|
| **Very Low** | 0 - 0.35 FAR | 113,288 | 13,973 | **0.1** |
| **Low** | 0.35 - 0.5 FAR | 0 | 0 | |
| **Medium Low** | 0.5 - 1.0 FAR | 0 | 0 | |
| **Medium High** | 1.0 - 3.0 FAR | 313,495 | 69,911 | **0.2** |
| **High** | 3.0 & up FAR | 965,891 | 329,761 | **0.3** |
| | **Total** | **1,392,674** | **413,645** | **0.3** |

| Achieved Density Level | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|
| **Very Low** | 808,777 | 172,505 | **0.2** |
| **Low** | 583,897 | 241,140 | **0.4** |
| **Medium Low** | 0 | 0 | **0.0** |
| **Medium High** | 0 | 0 | **0.0** |
| **High** | 0 | 0 | **0.0** |
| **Total** | **1,392,674** | **413,645** | **0.3** |



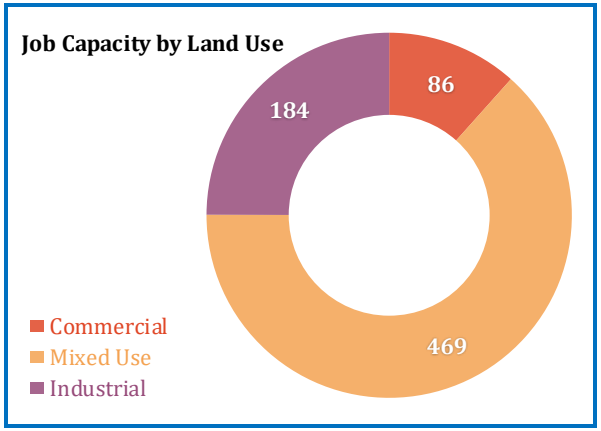



# Burien - Commercial/Industrial Land Supply and Job Capacity

| Land Supply | Gross Area (acres) | Critical Areas (acres) | ROWs (acres) | Public Purpose (acres) | Initial Land Supply | Market Factor | Buildable Area (acres) |
|---|---|---|---|---|---|---|---|
| **Vacant / Redev.** | | | | | | | |
| Commercial | 12.1 | 0.2 | 0.4 | 0.4 | 11.1 | 36% - 40% | 6.7 |
| Mixed Use | 129.3 | 13.7 | 3.5 | 3.5 | 108.7 | 10% - 46% | 64.9 |
| Industrial | 16.3 | 0.0 | 0.5 | 0.5 | 15.3 | 8% - 10% | 13.7 |
| **Non-Res Land Total** | **157.6** | **13.9** | **4.3** | **4.3** | **135.1** | | **85.3** |

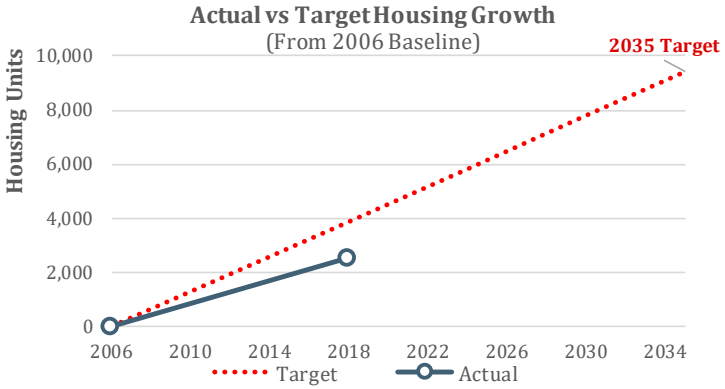
| Job Capacity by Land Use | Net Buildable Area (mil.sq.ft.) | Assumed Density Range (FAR) | Existing Floor Area (million sq.ft.) | Floor Area Capac. (million sq.ft.) | Sq. ft. per Job | Job Capacity |
|---|---|---|---|---|---|---|
| **Commercial** | | | | | | |
| Vacant | 0.15 | 0.22 / 0.40 | 0.00 | 0.06 | 650 | 86 |
| Redevelopable | 0.14 | 0.22 / 0.40 | 0.11 | 0.00 | 650 | 0 |
| **Commercial Total** | **0.29** | **0.22 / 0.40** | **0.11** | **0.06** | **650** | **86** |
| **Mixed-Use** | | | | | | |
| Vacant | 1.17 | 0.12 / 0.41 | 0.00 | 0.30 | 650 / 1200 | 406 |
| Redevelopable | 1.66 | 0.12 / 0.41 | 1.17 | 0.04 | 650 / 1200 | 62 |
| **Mixed Use Total** | **2.83** | **0.12 / 0.41** | **1.17** | **0.34** | **650 / 1200** | **469** |
| **Industrial** | | | | | | |
| Vacant | 0.09 | 0.41 | 0.00 | 0.04 | 1,200 | 30 |
| Redevelopable | 0.51 | 0.41 | 0.02 | 0.19 | 1,200 | 154 |
| **Industrial Total** | **0.60** | **0.41** | **0.02** | **0.22** | **1,200** | **184** |
| **City Total** | | | | | | |
| Commercial | 0.29 | 0.22 / 0.40 | 0.69 | 0.06 | 650 | 86 |
| Mixed Use | 2.83 | 0.12 / 0.41 | 0.91 | 0.34 | 650 / 1200 | 469 |
| Industrial | 0.60 | 0.41 | 0.26 | 0.22 | 1,200 | 184 |
| *Job Capacity in Pipeline* | | | | | | *13* |
| **City Total** | **3.71** | **0.12 / 0.41** | **1.86** | **0.62** | **650 / 1200** | **752** |

| Job Capacity by Assumed Density Level | # | % |
|---|---|---|
| Very Low Density | 414 | 56% |
| Low Density | 325 | 44% |
| Medium Low Density | 0 | 0% |
| Medium High Density | 0 | 0% |
| High Density | 0 | 0% |
| | | |
| *Capacity in Pipeline* | | *13* |
| **Total Capacity (jobs)** | | **752** |
| Remaining Target (2018-2035) | | 5,780 |
| **Surplus/Deficit Capacity (jobs)** | | **-5,027** |



# City of Federal Way

## Housing Growth and Residential Development Trends




| Federal Way Housing Growth Target: 2006-2035 | 9,396 |
|---|---|
| 2006 Estimated Housing Units | 34,560 |
| 2018 Estimated Housing Units | 37,085 |
| **Estimated Housing Growth** | **2,525** |
| **Remaining 2035 Target** | **6,871** |

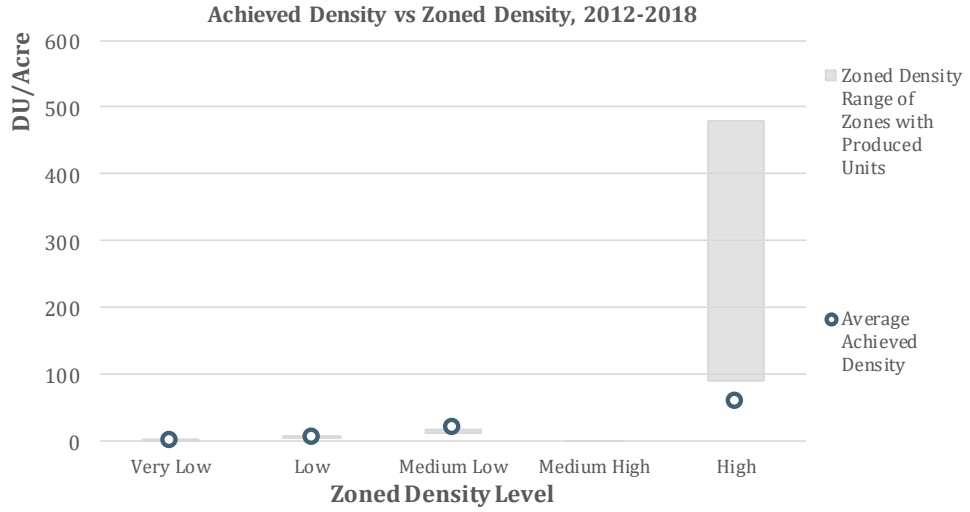
| % of Pace Needed to Achieve 2035 Housing Growth Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| **65.0%** | **0.61%** | **1.09%** |

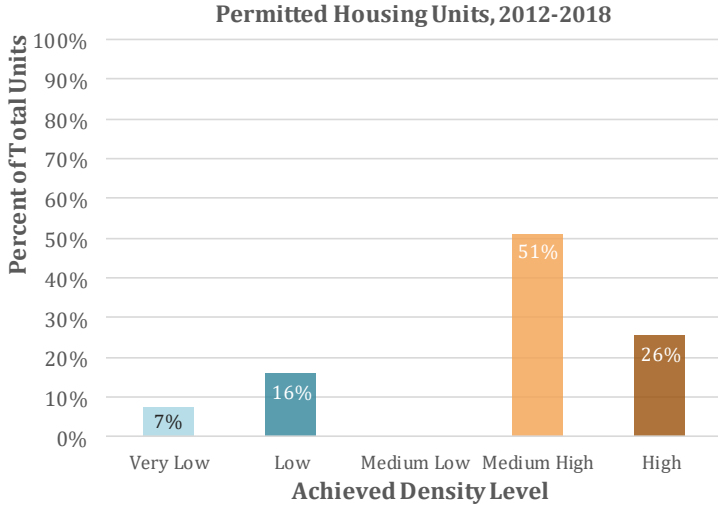
Since 2006, Federal Way has grown at 65% of the pace needed to achieve its 2035 housing growth target of 9,396 units. During this period, the total number of housing units in Federal Way grew by roughly 7%. At this current rate, Federal Way is under the production pace needed to meet its 2035 growth target, and needs to grow at an annual rate of 1.1% to reach its remaining target by 2035.

### Residential Achieved Densities

| Zoned Density (du/acre) | | Gross Area (acres) | Critical Areas (acres) | Public Purpose (acres) | ROWs (acres) | Net Area (acres) | Total Units | Achieved Density (DU/acre) |
|---|---|---|---|---|---|---|---|---|
| **Very Low** | 0 - 4 du/acre | 29.7 | 0.0 | 0.0 | 0.0 | 29.7 | 29 | **1.0** |
| **Low** | 4 - 10 du/acre | 57.1 | 0.0 | 0.0 | 0.0 | 57.1 | 245 | **4.3** |
| **Medium Low** | 10 - 24 du/acre | 59.0 | 17.9 | 7.1 | 0.3 | 33.7 | 659 | **19.5** |
| **Medium High** | 24 - 48 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| **High** | 48 & up du/acre | 14.1 | 0.0 | 0.5 | 1.5 | 12.2 | 723 | **59.2** |
| | **Total** | **160.0** | **17.9** | **7.6** | **1.7** | **132.8** | **1,656** | **12.5** |

| Achieved Density Level | Net Area (acres) | Total Units |
|---|---|---|
| **Very Low** | 56.5 | 123 |
| **Low** | 46.4 | 264 |
| **Medium Low** | 0.0 | 0 |
| **Medium High** | 26.1 | 846 |
| **High** | 3.7 | 423 |
| **Total** | **132.8** | **1,656** |



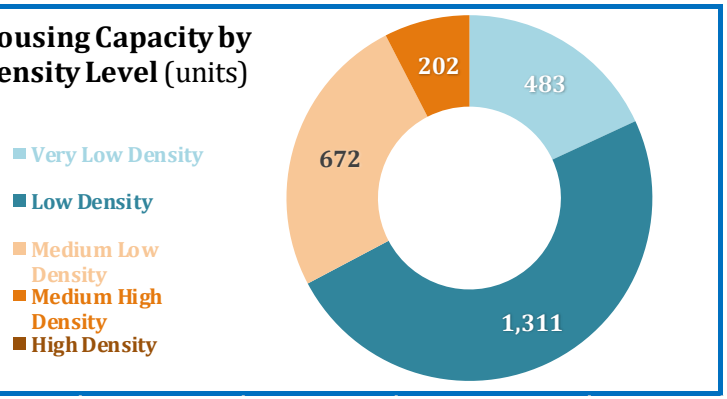



## Federal Way - Residential Land Supply and Capacity

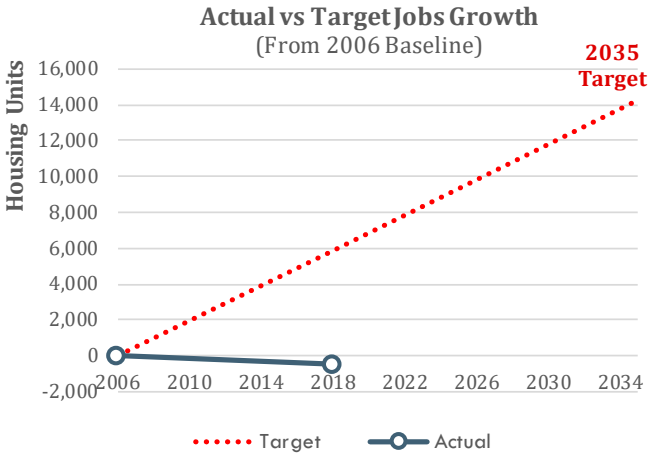
| Assumed Density Level | Vacant/ Redevelopable | Gross Acres | Critical Areas | Infrastructure Constrained Area | ROW & Public Purpose Discount | Market Factor (low/high) | Net Available Acres | Assumed Densities (low/high - units/acre) | Net Capacity (units) |
|---|---|---|---|---|---|---|---|---|---|
| Very Low Density | Vacant Subtotal | | | | 91.64 | 18.0% - 18.0% | 123.06 | 0.2 / 2.9 | 258 |
| | Redev Subtotal | | | | 118.17 | 18.0% - 18.0% | 158.68 | 0.2 / 2.9 | 225 |
| | **Subtotal** | 1,391.30 | 791.83 | 0.00 | 209.81 | | 281.75 | | **483** |
| Low Density | Vacant Subtotal | | | | 99.14 | 18.0% - 18.0% | 133.14 | 4.5 / 8.7 | 723 |
| | Redev Subtotal | | | | 136.12 | 18.0% - 18.0% | 182.78 | 4.5 / 8.7 | 588 |
| | **Subtotal** | 1,459.97 | 787.80 | 0.00 | 235.26 | | 315.92 | | **1,311** |
| Medium Low Density | Vacant Subtotal | | | | 9.70 | 7.0% - 7.0% | 26.38 | 12.1 / 18.2 | 327 |
| | Redev Subtotal | | | | 21.98 | 7.0% - 7.0% | 59.79 | 12.1 / 18.2 | 345 |
| | **Subtotal** | 276.10 | 149.37 | 0.00 | 31.68 | | 86.18 | | **672** |
| Medium High Density | Vacant Subtotal | | | | 2.43 | 7.0% - 7.0% | 6.62 | 24.2 | 160 |
| | Redev Subtotal | | | | 0.82 | 7.0% - 7.0% | 2.22 | 24.2 | 42 |
| | **Subtotal** | 39.00 | 26.01 | 0.00 | 3.25 | | 8.83 | | **202** |
| High Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | **Subtotal** | 438.09 | 91.21 | 0.00 | 0.00 | | 0.00 | | **0** |
| All Zones | Vacant Total | | | | 202.92 | | 289.20 | | 1,468 |
| | Redev Total | | | | 277.08 | | 403.47 | | 1,199 |
| | **Total** | **3,604.46** | **1,846.21** | **0.00** | **480.00** | | **692.68** | | **2,667** |

| Capacity (units) | |
|---|---|
| Very Low Density Zones | 483 |
| Low Density Zones | 1,311 |
| Medium Low Density Zones | 672 |
| Medium High Density Zones | 202 |
| High Density Zones | 0 |
| *Capacity in Pipeline* | *0* |
| | |
| **Total Capacity (Units)** | **2,667** |
| Remaining Target (2018-2035) | 6,871 |
| **Surplus/Deficit Capacity (Units)** | **-4,204** |

**Housing Capacity by Density Level** (units)



# Federal Way - Employment Growth and Commercial/Industrial Development Trends




| Federal Way Jobs Growth Target: 2006-2035 | 14,268 |
|---|---|
| 2006 Jobs (PSRC) | 31,616 |
| 2018 Jobs (PSRC) | 31,148 |
| **Total Jobs Growth** | **-468** |
| **Remaining 2035 Target** | **14,736** |

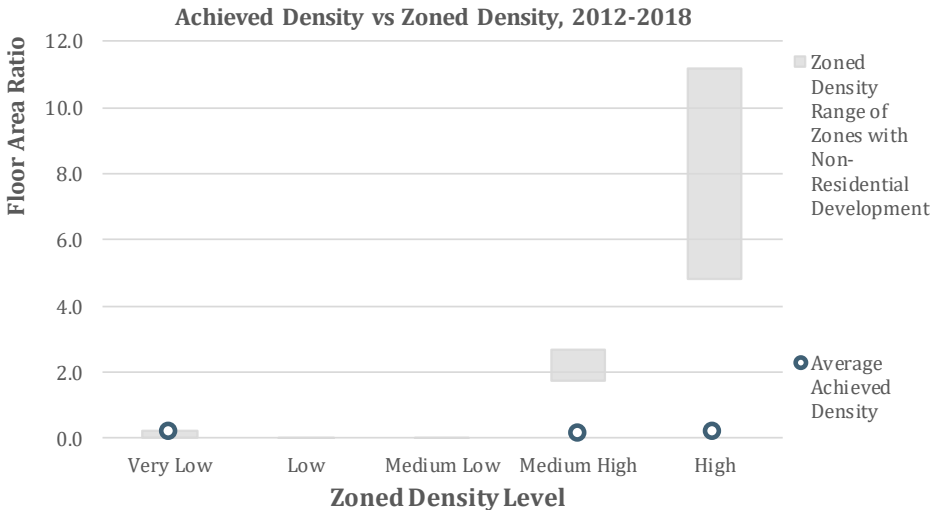
| % of Pace Needed to Achieve 2035 Jobs Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| -7.9% | -0.12% | 2.78% |

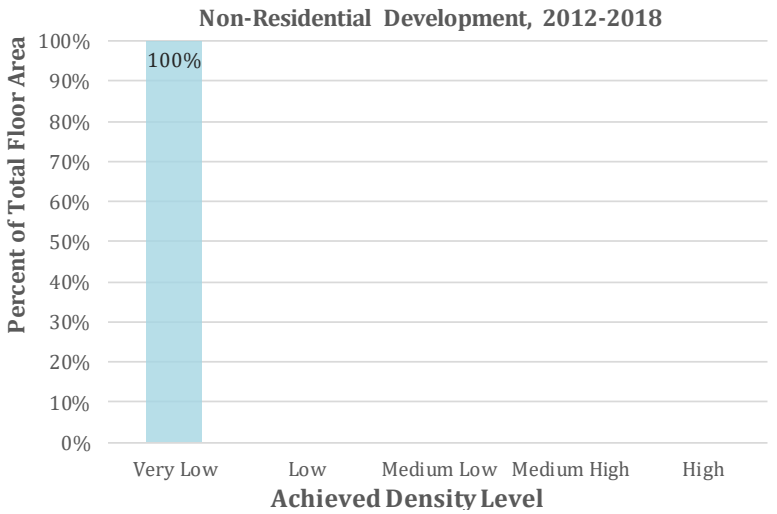
Since 2006, Federal Way has grown at -8% of the pace needed to achieve its 2035 jobs growth target of 14,268 units. During this period, the total number of jobs in Federal Way grew by roughly -1%. At this current rate, Federal Way is under the pace needed to meet its 2035 jobs growth target, and needs to grow at an annual rate of 2.8% to reach its remaining target by 2035.

## Non-Residential Achieved Densities

| Zoned Density (FAR) | | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|---|
| **Very Low** | 0 - 0.35 FAR | 56,628 | 9,120 | **0.2** |
| **Low** | 0.35 - 0.5 FAR | 0 | 0 | |
| **Medium Low** | 0.5 - 1.0 FAR | 0 | 0 | |
| **Medium High** | 1.0 - 3.0 FAR | 2,989,922 | 407,512 | **0.1** |
| **High** | 3.0 & up FAR | 1,222,002 | 218,100 | **0.2** |
| | **Total** | **4,268,552** | **634,732** | **0.1** |

| Achieved Density Level | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|
| **Very Low** | 4,268,552 | 634,732 | **0.1** |
| **Low** | 0 | 0 | **0.0** |
| **Medium Low** | 0 | 0 | **0.0** |
| **Medium High** | 0 | 0 | **0.0** |
| **High** | 0 | 0 | **0.0** |
| **Total** | **4,268,552** | **634,732** | **0.1** |



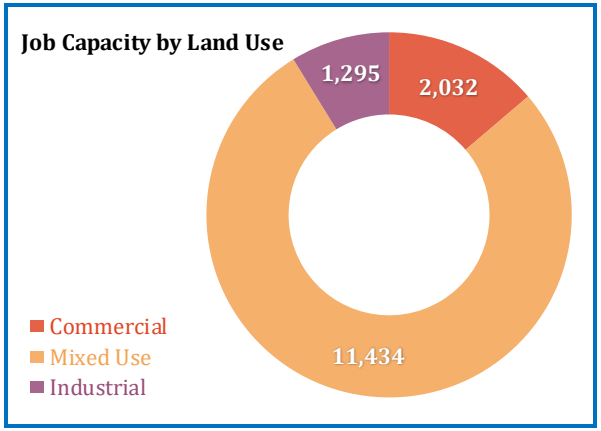
# Federal Way - Commercial/Industrial Land Supply and Job Capacity

| Land Supply | Gross Area (acres) | Critical Areas (acres) | ROWs (acres) | Public Purpose (acres) | Initial Land Supply | Market Factor | Buildable Area (acres) |
|---|---|---|---|---|---|---|---|
| **Vacant / Redev.** | | | | | | | |
| Commercial | 536.0 | 224.3 | 46.8 | 15.6 | 249.3 | 15% | 202.6 |
| Mixed Use | 253.2 | 24.8 | 34.3 | 11.4 | 182.7 | 1% - 5% | 175.2 |
| Industrial | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0% | 0.0 |
| **Non-Res Land Total** | **789.2** | **249.1** | **81.0** | **32.9** | **526.8** | | **377.8** |

| Job Capacity by Land Use | Net Buildable Area (mil.sq.ft.) | Assumed Density Range (FAR) | Existing Floor Area (million sq.ft.) | Floor Area Capac. (million sq.ft.) | Sq. ft. per Job | Job Capacity |
|---|---|---|---|---|---|---|
| **Commercial** | | | | | | |
| Vacant | 4.68 | 0.38 | 0.00 | 1.16 | 700 / 900 | 1,302 |
| Redevelopable | 4.14 | 0.38 | 0.08 | 0.66 | 700 / 900 | 730 |
| **Commercial Total** | **8.82** | **0.38** | **0.08** | **1.82** | **700 / 900** | **2,032** |
| **Mixed-Use** | | | | | | |
| Vacant | 3.23 | 0.18 / 1.50 | 0.01 | 0.82 | 375 | 2,183 |
| Redevelopable | 4.40 | 0.18 / 1.50 | 0.35 | 3.47 | 375 | 9251 |
| **Mixed Use Total** | **7.63** | **0.18 / 1.50** | **0.36** | **4.29** | **375** | **11,434** |
| **Industrial*** | | | | | | |
| Vacant | 1.38 | 0.40 | 0.00 | 0.55 | 1,100 | 503 |
| Redevelopable | 2.49 | 0.40 | 0.12 | 0.87 | 1,100 | 792 |
| **Industrial Total** | **3.87** | **0.40** | **0.12** | **1.42** | **1,100** | **1,295** |
| **City Total** | | | | | | |
| Commercial | 8.82 | 0.38 | 0.69 | 1.82 | 700 / 900 | 2,032 |
| Mixed Use | 7.63 | 0.18 / 1.50 | 0.91 | 4.29 | 375 | 11,434 |
| Industrial | 3.87 | 0.40 | 0.26 | 1.42 | 1,100 | 1,295 |
| *Job Capacity in Pipeline* | | | | | | *0* |
| **City Total** | **20.33** | **1.50** | **1.86** | **7.53** | **375 / 1100** | **14,761** |

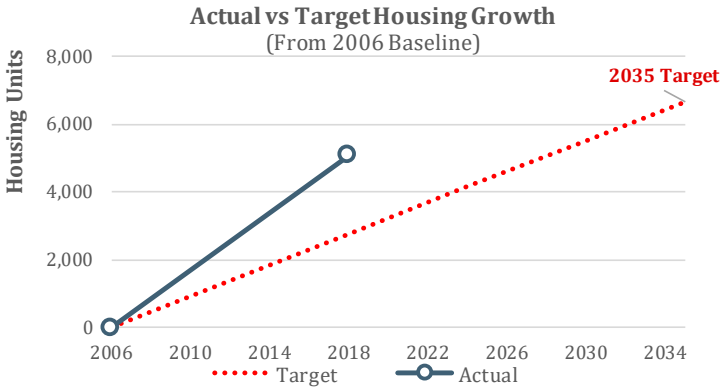
*Certain zones grouped as industrial allow for commercial use.

| Job Capacity by Assumed Density Level | # | % |
|---|---|---|
| Very Low Density | 2,149 | 15% |
| Low Density | 3,267 | 22% |
| Medium Low Density | 1,245 | 8% |
| Medium High Density | 8,099 | 55% |
| High Density | 0 | 0% |
| | | |
| *Capacity in Pipeline* | | *0* |
| **Total Capacity (jobs)** | | **14,761** |
| Remaining Target (2018-2035) | | 14,736 |
| **Surplus/Deficit Capacity (jobs)** | | **25** |



# City of Issaquah

## Housing Growth and Residential Development Trends




| Issaquah Housing Growth Target: 2006-2035 | 6,670 |
|---|---|
| 2006 Estimated Housing Units | 11,517 |
| 2018 Estimated Housing Units | 16,612 |
| **Estimated Housing Growth** | **5,096** |
| **Remaining 2035 Target** | **1,574** |

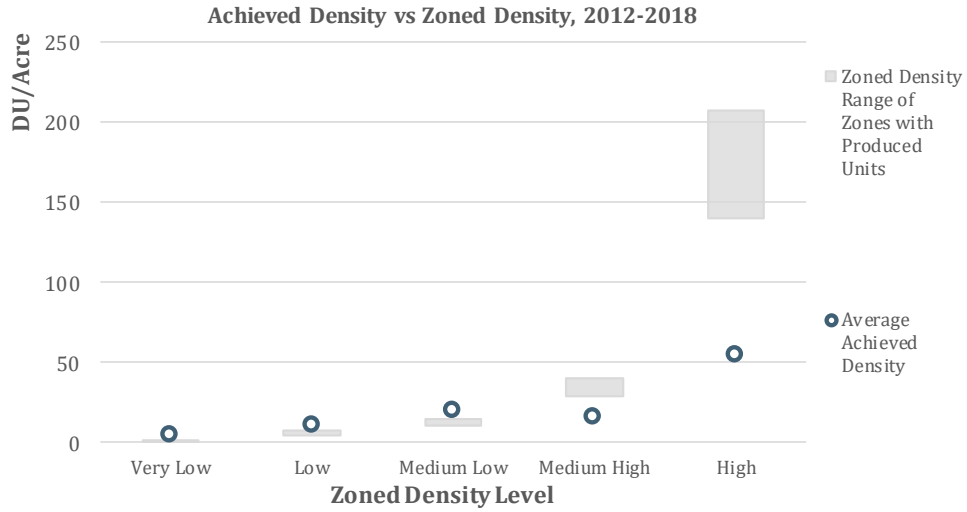
| % of Pace Needed to Achieve 2035 Housing Growth Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| 184.6% | 3.69% | 0.56% |

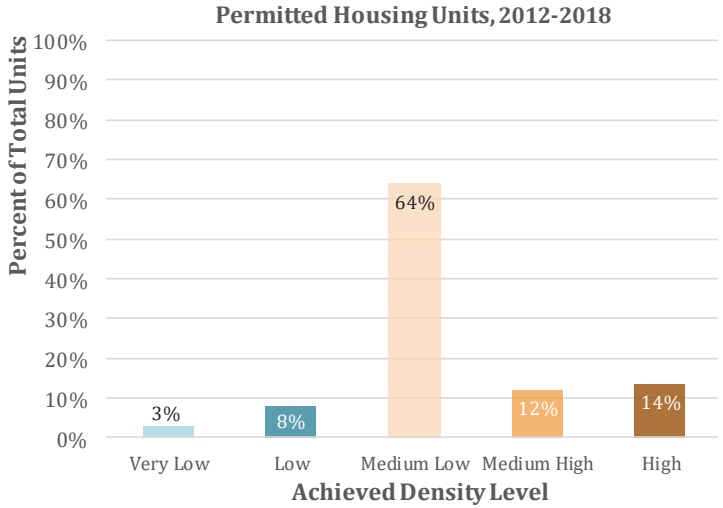
Since 2006, Issaquah has grown at 185% of the pace needed to achieve its 2035 housing growth target of 6,670 units. During this period, the total number of housing units in Issaquah grew by roughly 44%. At this current rate, Issaquah is over the production pace needed to meet its 2035 growth target, and needs to grow at an annual rate of 0.6% to reach its remaining target by 2035.

### Residential Achieved Densities

| Zoned Density (du/acre) | | Gross Area (acres) | Critical Areas (acres) | Public Purpose (acres) | ROWs (acres) | Net Area (acres) | Total Units | Achieved Density (DU/acre) |
|---|---|---|---|---|---|---|---|---|
| Very Low | 0 - 4 du/acre | 26.0 | 7.3 | 0.0 | 0.0 | 18.7 | 78 | **4.2** |
| Low | 4 - 10 du/acre | 47.7 | 0.3 | 0.0 | 0.0 | 47.4 | 481 | **10.1** |
| Medium Low | 10 - 24 du/acre | 21.4 | 0.2 | 0.0 | 3.1 | 18.1 | 358 | **19.8** |
| Medium High | 24 - 48 du/acre | 87.2 | 0.1 | 1.0 | 3.5 | 82.5 | 1,238 | **15.0** |
| High | 48 & up du/acre | 9.7 | 3.0 | 0.0 | 0.0 | 6.6 | 356 | **53.6** |
| | **Total** | **191.9** | **10.9** | **1.0** | **6.6** | **173.4** | **2,511** | **14.5** |

| Achieved Density Level | Net Area (acres) | Total Units |
|---|---|---|
| Very Low | 27.8 | 67 |
| Low | 26.7 | 196 |
| Medium Low | 103.0 | 1,606 |
| Medium High | 10.2 | 298 |
| High | 5.6 | 344 |
| **Total** | **173.4** | **2,511** |



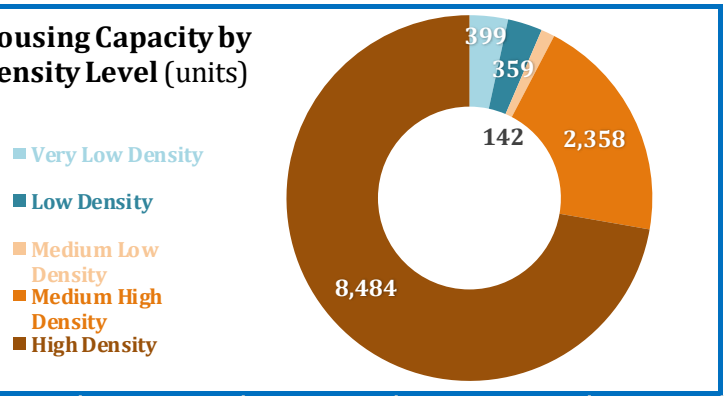



## Issaquah - Residential Land Supply and Capacity

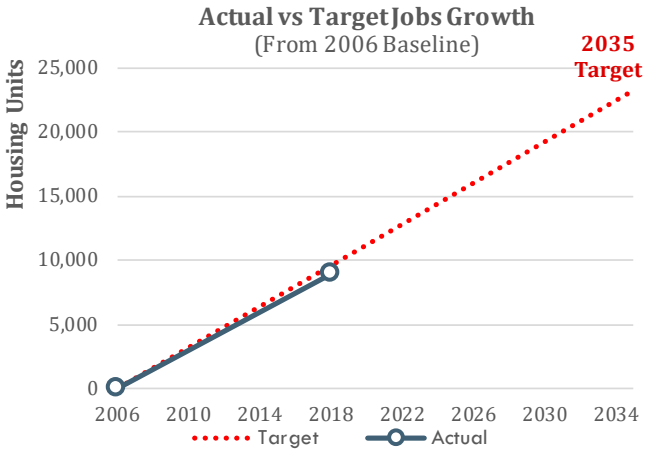
| Assumed Density Level | Vacant/ Redevelopable | Gross Acres | Critical Areas | Infrastructure Constrained Area | ROW & Public Purpose Discount | Market Factor (low/high) | Net Available Acres | Assumed Densities (low/high - units/acre) | Net Capacity (units) |
|---|---|---|---|---|---|---|---|---|---|
| Very Low Density | Vacant Subtotal | | | | 22.10 | 7.0% - 15.0% | 69.11 | 4.0 | 175 |
| | Redev Subtotal | | | | 44.47 | 7.0% - 15.0% | 137.42 | 4.0 | 224 |
| | **Subtotal** | 392.70 | 103.48 | 0.00 | 66.57 | | 206.53 | | **399** |
| Low Density | Vacant Subtotal | | | | 8.22 | 12.0% - 25.0% | 27.10 | 6.9 / 9.2 | 197 |
| | Redev Subtotal | | | | 19.78 | 12.0% - 25.0% | 64.55 | 6.9 / 9.2 | 162 |
| | **Subtotal** | 166.28 | 27.60 | 0.00 | 28.00 | | 91.65 | | **359** |
| Medium Low Density | Vacant Subtotal | | | | 1.32 | 1.0% - 15.0% | 8.28 | 11.7 / 15.0 | 109 |
| | Redev Subtotal | | | | 1.27 | 1.0% - 15.0% | 7.50 | 11.7 / 15.0 | 32 |
| | **Subtotal** | 22.65 | 1.89 | 0.00 | 2.60 | | 15.78 | | **142** |
| Medium High Density | Vacant Subtotal | | | | 11.37 | 1.0% - 25.0% | 68.43 | 27.0 / 33.0 | 2,063 |
| | Redev Subtotal | | | | 2.55 | 1.0% - 25.0% | 12.73 | 27.0 / 33.0 | 295 |
| | **Subtotal** | 28.69 | 2.72 | 0.00 | 13.92 | | 81.15 | | **2,358** |
| High Density | Vacant Subtotal | | | | 6.29 | 15.0% - 20.0% | 33.55 | 50.0 / 60.0 | 1,982 |
| | Redev Subtotal | | | | 32.50 | 15.0% - 20.0% | 122.37 | 50.0 / 60.0 | 6,503 |
| | **Subtotal** | 292.63 | 21.71 | 0.00 | 38.79 | | 155.92 | | **8,484** |
| All Zones | Vacant Total | | | | 49.30 | | 206.47 | | 4,526 |
| | Redev Total | | | | 100.58 | | 344.57 | | 7,216 |
| | **Total** | **902.95** | **157.40** | **0.00** | **149.87** | | **551.04** | | **11,743** |

| Capacity (units) | |
|---|---|
| Very Low Density Zones | 399 |
| Low Density Zones | 359 |
| Medium Low Density Zones | 142 |
| Medium High Density Zones | 2,358 |
| High Density Zones | 8,484 |
| *Capacity in Pipeline* | *2,360* |
| | |
| **Total Capacity (Units)** | **14,103** |
| Remaining Target (2018-2035) | 1,574 |
| **Surplus/Deficit Capacity (Units)** | **12,528** |

**Housing Capacity by Density Level** (units)



# Issaquah - Employment Growth and Commercial/Industrial Development Trends




| Issaquah Jobs Growth Target: 2006-2035 | 23,200 |
|---|---|
| 2006 Jobs (PSRC) | 18,889 |
| 2018 Jobs (PSRC) | 27,839 |
| **Total Jobs Growth** | **8,950** |
| Remaining 2035 Target | 14,250 |

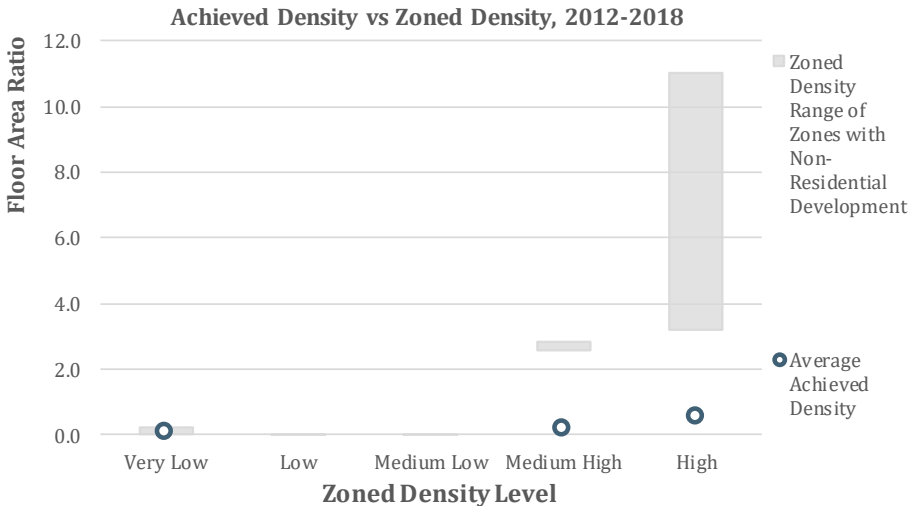
| % of Pace Needed to Achieve 2035 Jobs Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| 93.2% | 3.95% | 3.01% |

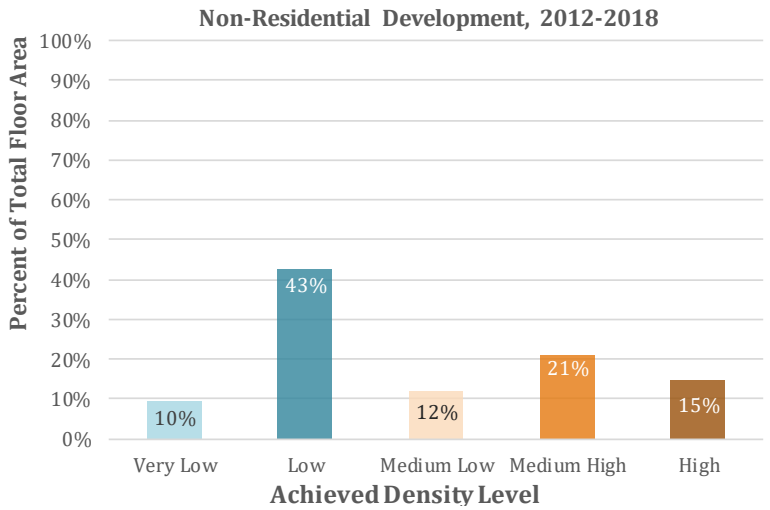
Since 2006, Issaquah has grown at 93% of the pace needed to achieve its 2035 jobs growth target of 23,200 units. During this period, the total number of jobs in Issaquah grew by roughly 47%. At this current rate, Issaquah is under the pace needed to meet its 2035 jobs growth target, and needs to grow at an annual rate of 3% to reach its remaining target by 2035.

## Non-Residential Achieved Densities

| Zoned Density (FAR) | | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|---|
| Very Low | 0 - 0.35 FAR | 1,069,083 | 79,167 | 0.1 |
| Low | 0.35 - 0.5 FAR | 0 | 0 | |
| Medium Low | 0.5 - 1.0 FAR | 0 | 0 | |
| Medium High | 1.0 - 3.0 FAR | 62,188 | 10,650 | 0.2 |
| High | 3.0 & up FAR | 1,705,456 | 938,629 | 0.6 |
| | Total | 2,836,727 | 1,028,446 | 0.4 |

| Achieved Density Level | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|
| Very Low | 1,263,400 | 99,261 | 0.1 |
| Low | 1,226,830 | 439,629 | 0.4 |
| Medium Low | 204,521 | 122,521 | 0.6 |
| Medium High | 92,998 | 217,468 | 2.3 |
| High | 48,978 | 149,567 | 3.1 |
| Total | 2,836,727 | 1,028,446 | 0.4 |



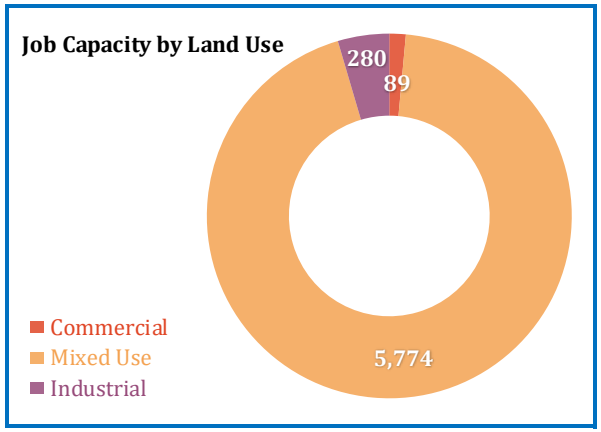



## Issaquah - Commercial/Industrial Land Supply and Job Capacity

| Land Supply | Gross Area (acres) | Critical Areas (acres) | ROWs (acres) | Public Purpose (acres) | Initial Land Supply | Market Factor | Buildable Area (acres) |
|---|---|---|---|---|---|---|---|
| **Vacant / Redev.** | | | | | | | |
| Commercial | 1.3 | 0.1 | 0.1 | 0.1 | 1.0 | 0% | 1.0 |
| Mixed Use | 318.6 | 41.0 | 30.1 | 13.9 | 233.6 | 11% - 25% | 183.6 |
| Industrial | 18.4 | 1.2 | 1.3 | 0.9 | 15.1 | 15% | 12.5 |
| **Non-Res Land Total** | **338.2** | **42.3** | **31.4** | **14.8** | **249.7** | | **197.1** |

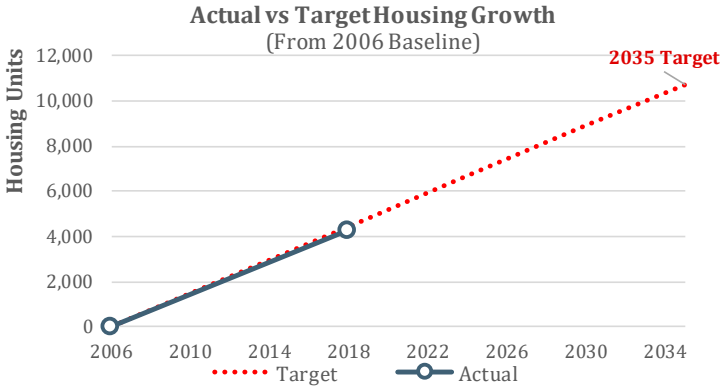
| Job Capacity by Land Use | Net Buildable Area (mil.sq.ft.) | Assumed Density Range (FAR) | Existing Floor Area (million sq.ft.) | Floor Area Capac. (million sq.ft.) | Sq. ft. per Job | Job Capacity |
|---|---|---|---|---|---|---|
| **Commercial** | | | | | | |
| Vacant | 0.04 | 0.50 | 0.00 | 0.02 | 250 | 89 |
| Redevelopable | 0.00 | 0.50 | 0.00 | 0.00 | 250 | 0 |
| **Commercial Total** | **0.04** | **0.50** | **0.00** | **0.02** | **250** | **89** |
| **Mixed-Use** | | | | | | |
| Vacant | 1.76 | 1.50 | 0.00 | 0.80 | 0 / 300 | 3,117 |
| Redevelopable | 6.24 | 1.50 | 2.45 | 0.77 | 0 / 300 | 2657 |
| **Mixed Use Total** | **8.00** | **1.50** | **2.45** | **1.57** | **0 / 300** | **5,774** |
| **Industrial** | | | | | | |
| Vacant | 0.36 | 0.50 | 0.00 | 0.18 | 700 | 254 |
| Redevelopable | 0.19 | 0.50 | 0.08 | 0.02 | 700 | 26 |
| **Industrial Total** | **0.54** | **0.50** | **0.08** | **0.20** | **700** | **280** |
| **City Total** | | | | | | |
| Commercial | 0.04 | 0.50 | 0.69 | 0.02 | 250 | 89 |
| Mixed Use | 8.00 | 1.50 | 0.91 | 1.57 | 0 / 300 | 5,774 |
| Industrial | 0.54 | 0.50 | 0.26 | 0.20 | 700 | 280 |
| *Job Capacity in Pipeline* | | | | | | *9,418* |
| **City Total** | **8.59** | **1.50** | **1.86** | **1.79** | **0 / 700** | **15,561** |

| Job Capacity by Assumed Density Level | # | % |
|---|---|---|
| Very Low Density | 125 | 2% |
| Low Density | 469 | 8% |
| Medium Low Density | 5,549 | 90% |
| Medium High Density | 0 | 0% |
| High Density | 0 | 0% |
| | | |
| *Capacity in Pipeline* | | *9,418* |
| **Total Capacity (jobs)** | | **15,561** |
| Remaining Target (2018-2035) | | 14,250 |
| **Surplus/Deficit Capacity (jobs)** | | **1,311** |



# City of Kent

## Housing Growth and Residential Development Trends




| | |
|---|---|
| **Kent Housing Growth Target: 2006-2035** | **10,753** |
| 2006 Estimated Housing Units | 43,552 |
| 2018 Estimated Housing Units | 47,811 |
| **Estimated Housing Growth** | **4,259** |
| **Remaining 2035 Target** | **6,495** |

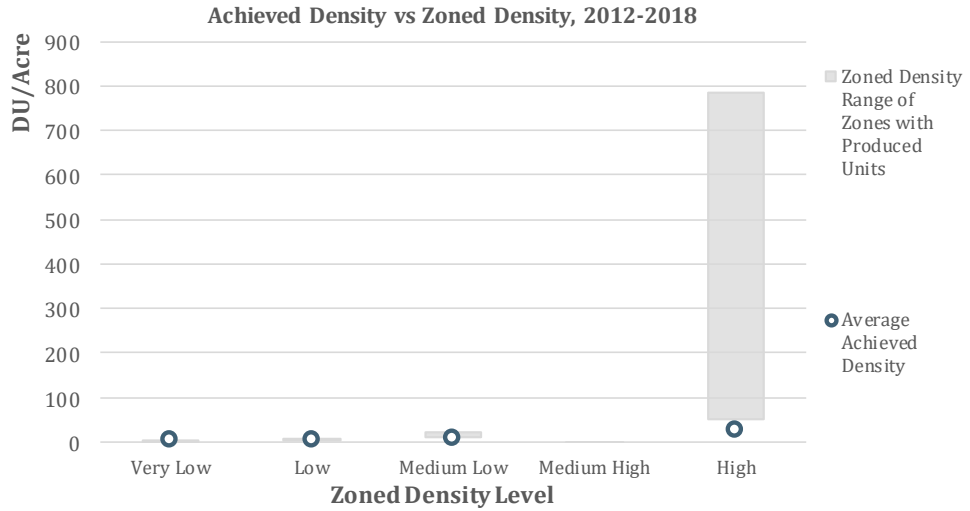
| % of Pace Needed to Achieve 2035 Housing Growth Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| **95.7%** | **0.81%** | **0.80%** |

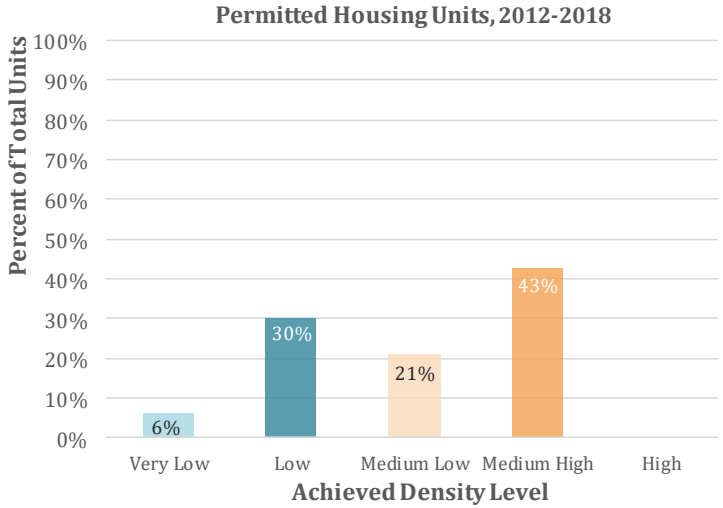
Since 2006, Kent has grown at 96% of the pace needed to achieve its 2035 housing growth target of 10,753 units. During this period, the total number of housing units in Kent grew by roughly 10%. At this current rate, Kent is under the production pace needed to meet its 2035 growth target, and needs to grow at an annual rate of 0.8% to reach its remaining target by 2035.

### Residential Achieved Densities

| Zoned Density (du/acre) | | Gross Area (acres) | Critical Areas (acres) | Public Purpose (acres) | ROWs (acres) | Net Area (acres) | Total Units | Achieved Density (DU/acre) |
|---|---|---|---|---|---|---|---|---|
| **Very Low** | 0 - 4 du/acre | 81.2 | 27.5 | 0.0 | 41.7 | 11.9 | 48 | **4.0** |
| **Low** | 4 - 10 du/acre | 275.7 | 54.6 | 0.0 | 22.1 | 199.0 | 644 | **3.2** |
| **Medium Low** | 10 - 24 du/acre | 50.2 | 4.6 | 0.0 | 1.8 | 43.8 | 255 | **5.8** |
| **Medium High** | 24 - 48 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| **High** | 48 & up du/acre | 76.8 | 19.0 | 0.0 | 0.4 | 57.4 | 1,572 | **27.4** |
| | **Total** | **483.9** | **105.7** | **0.0** | **66.0** | **312.2** | **2,519** | **8.1** |

| Achieved Density Level | Net Area (acres) | Total Units |
|---|---|---|
| **Very Low** | 97.1 | 156 |
| **Low** | 155.9 | 755 |
| **Medium Low** | 27.1 | 528 |
| **Medium High** | 32.0 | 1,080 |
| **High** | 0.0 | 0 |
| **Total** | **312.2** | **2,519** |



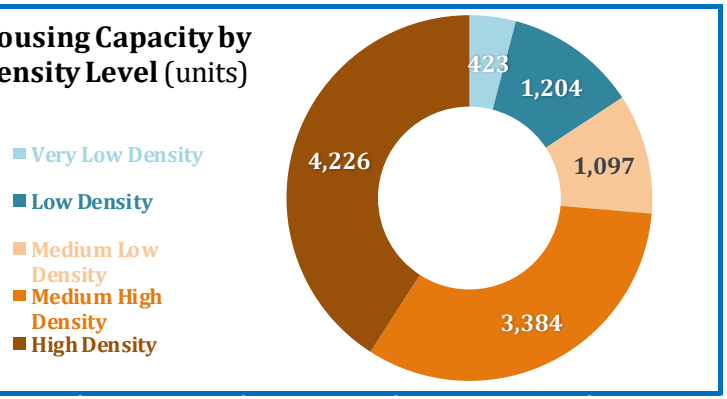



## Kent - Residential Land Supply and Capacity

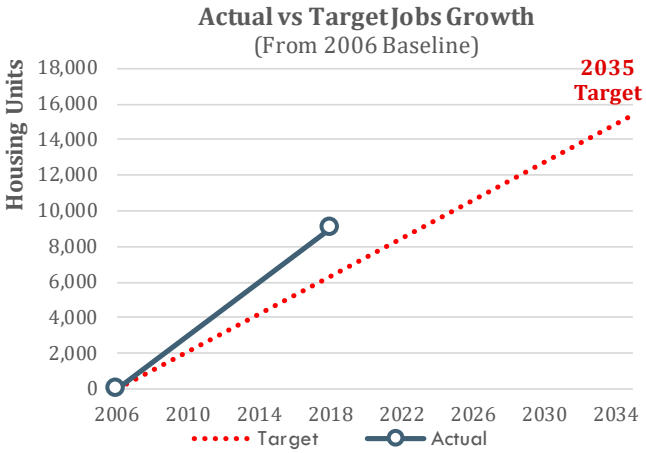
| Assumed Density Level | Vacant/ Redevelopable | Gross Acres | Critical Areas | Infrastructure Constrained Area | ROW & Public Purpose Discount | Market Factor (low/high) | Net Available Acres | Assumed Densities (low/high - units/acre) | Net Capacity (units) |
|---|---|---|---|---|---|---|---|---|---|
| Very Low Density | Vacant Subtotal | | | | 20.47 | 10.0% - 14.0% | 159.75 | 3.9 | 365 |
| | Redev Subtotal | | | | 12.33 | 10.0% - 14.0% | 96.84 | 3.9 | 58 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 32.80 | | 256.59 | | **423** |
| Low Density | Vacant Subtotal | | | | 28.53 | 5.0% - 20.0% | 228.17 | 4.7 / 5.8 | 1,085 |
| | Redev Subtotal | | | | 30.68 | 5.0% - 20.0% | 245.26 | 4.7 / 9.0 | 119 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 59.21 | | 473.43 | | **1,204** |
| Medium Low Density | Vacant Subtotal | | | | 4.07 | 11.0% - 20.0% | 31.33 | 10.9 / 20.6 | 569 |
| | Redev Subtotal | | | | 4.14 | 11.0% - 20.0% | 32.30 | 10.9 / 20.6 | 528 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 8.21 | | 63.63 | | **1,097** |
| Medium High Density | Vacant Subtotal | | | | 8.57 | 11.0% - 20.0% | 67.54 | 39.7 / 40.0 | 2,681 |
| | Redev Subtotal | | | | 2.26 | 11.0% - 20.0% | 17.77 | 39.7 / 40.0 | 703 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 10.83 | | 85.31 | | **3,384** |
| High Density | Vacant Subtotal | | | | 3.81 | 11.0% - 20.0% | 29.15 | 83.3 / 174.2 | 2,800 |
| | Redev Subtotal | | | | 1.87 | 11.0% - 20.0% | 13.84 | 83.3 / 174.2 | 1,426 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 5.68 | | 42.99 | | **4,226** |
| All Zones | Vacant Total | | | | 65.45 | | 515.95 | | 7,500 |
| | Redev Total | | | | 51.28 | | 406.00 | | 2,833 |
| | **Total** | **0.00** | **0.00** | **0.00** | **116.73** | | **921.95** | | **10,333** |

| Capacity (units) | |
|---|---|
| Very Low Density Zones | 423 |
| Low Density Zones | 1,204 |
| Medium Low Density Zones | 1,097 |
| Medium High Density Zones | 3,384 |
| High Density Zones | 4,226 |
| *Capacity in Pipeline* | *915* |
| | |
| **Total Capacity (Units)** | **11,248** |
| Remaining Target (2018-2035) | 6,495 |
| **Surplus/Deficit Capacity (Units)** | **4,753** |

**Housing Capacity by Density Level** (units)



# Kent - Employment Growth and Commercial/Industrial Development Trends




| Kent Jobs Growth Target: 2006-2035 | 15,405 |
|---|---|
| 2006 Jobs (PSRC) | 63,299 |
| 2018 Jobs (PSRC) | 72,360 |
| **Total Jobs Growth** | **9,061** |
| Remaining 2035 Target | 6,344 |

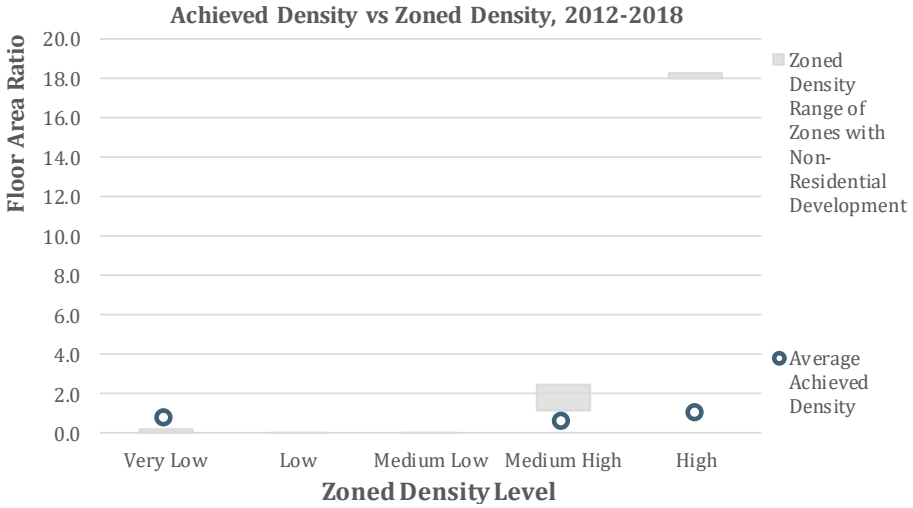
| % of Pace Needed to Achieve 2035 Jobs Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| 142.1% | 1.19% | 0.52% |

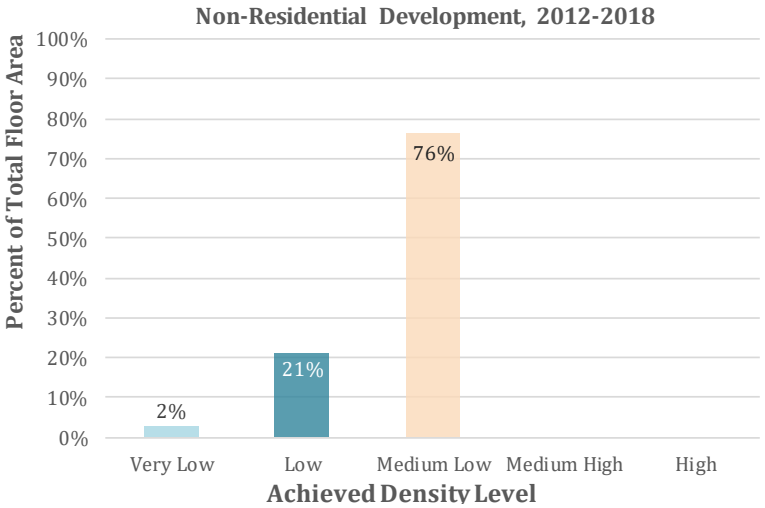
Since 2006, Kent has grown at 142% of the pace needed to achieve its 2035 jobs growth target of 15,405 units. During this period, the total number of jobs in Kent grew by roughly 14%. At this current rate, Kent is over the pace needed to meet its 2035 jobs growth target, and needs to grow at an annual rate of 0.5% to reach its remaining target by 2035.

## Non-Residential Achieved Densities

| Zoned Density (FAR) | | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|---|
| Very Low | 0 - 0.35 FAR | 67,191 | 51,095 | 0.8 |
| Low | 0.35 - 0.5 FAR | 0 | 0 | |
| Medium Low | 0.5 - 1.0 FAR | 0 | 0 | |
| Medium High | 1.0 - 3.0 FAR | 9,107,938 | 4,907,235 | 0.5 |
| High | 3.0 & up FAR | 93,131 | 91,268 | 1.0 |
| | Total | 9,268,260 | 5,049,598 | 0.5 |

| Achieved Density Level | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|
| Very Low | 745,943 | 123,090 | 0.2 |
| Low | 2,598,787 | 1,070,908 | 0.4 |
| Medium Low | 5,923,530 | 3,855,600 | 0.7 |
| Medium High | 0 | 0 | 0.0 |
| High | 0 | 0 | 0.0 |
| Total | 9,268,260 | 5,049,598 | 0.5 |



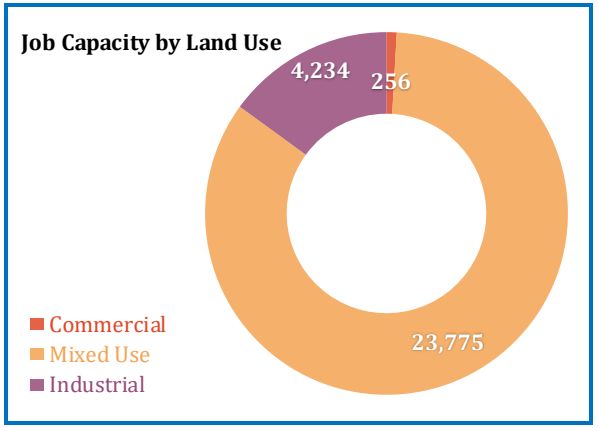
# Kent - Commercial/Industrial Land Supply and Job Capacity

| Land Supply | Gross Area (acres) | Critical Areas (acres) | ROWs (acres) | Public Purpose (acres) | Initial Land Supply | Market Factor | Buildable Area (acres) |
|---|---|---|---|---|---|---|---|
| **Vacant / Redev.** | | | | | | | |
| Commercial | 6.2 | 0.0 | 1.2 | 0.6 | 4.3 | 50% | 1.2 |
| Mixed Use | 279.2 | 0.0 | 55.8 | 27.9 | 195.4 | 11% - 20% | 162.6 |
| Industrial | 511.9 | 0.0 | 102.4 | 51.2 | 358.3 | 5% | 332.7 |
| **Non-Res Land Total** | **797.3** | **0.0** | **159.5** | **87.5** | **612.2** | | **496.6** |

| Job Capacity by Land Use | Net Buildable Area (mil.sq.ft.) | Assumed Density Range (FAR) | Existing Floor Area (million sq.ft.) | Floor Area Capac. (million sq.ft.) | Sq. ft. per Job | Job Capacity |
|---|---|---|---|---|---|---|
| **Commercial*** | | | | | | |
| Vacant | 1.29 | 0.09 / 0.28 | 0.00 | 0.27 | 300 / 1200 | 252 |
| Redevelopable | 0.72 | 0.09 / 0.28 | 0.17 | 0.01 | 1,200 | 5 |
| **Commercial Total** | **2.01** | **0.09 / 0.28** | **0.17** | **0.28** | **300 / 1200** | **256** |
| **Mixed-Use** | | | | | | |
| Vacant | 4.53 | 2.45 | 0.00 | 6.01 | 300 | 20,029 |
| Redevelopable | 2.55 | 2.45 | 2.44 | 1.12 | 300 | 3746 |
| **Mixed Use Total** | **7.08** | **2.45** | **2.44** | **7.13** | **300** | **23,775** |
| **Industrial** | | | | | | |
| Vacant | 6.90 | 0.39 / 0.64 | 0.00 | 3.35 | 1,200 | 2,790 |
| Redevelopable | 7.60 | 0.39 / 0.64 | 1.73 | 1.73 | 1,200 | 1444 |
| **Industrial Total** | **14.49** | **0.39 / 0.64** | **1.73** | **5.08** | **1,200** | **4,234** |
| **City Total** | | | | | | |
| Commercial | 2.01 | 0.09 / 0.28 | 0.69 | 0.28 | 300 / 1200 | 256 |
| Mixed Use | 7.08 | 2.45 | 0.91 | 7.13 | 300 | 23,775 |
| Industrial | 14.49 | 0.39 / 0.64 | 0.26 | 5.08 | 1,200 | 4,234 |
| *Job Capacity in Pipeline* | | | | | | *730* |
| **City Total** | **23.59** | **2.45** | **1.86** | **12.49** | **300 / 1200** | **28,995** |

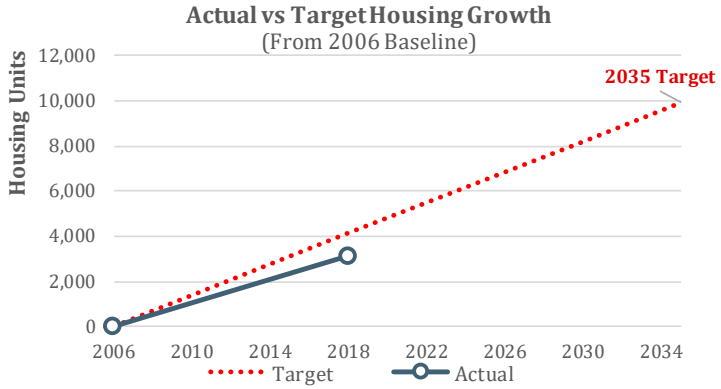
*Certain zones grouped as commercial allow for industrial use.

| Job Capacity by Assumed Density Level | # | % |
|---|---|---|
| Very Low Density | 1,187 | 4% |
| Low Density | 2,889 | 10% |
| Medium Low Density | 2,372 | 8% |
| Medium High Density | 21,817 | 77% |
| High Density | 0 | 0% |
| | | |
| *Capacity in Pipeline* | | *730* |
| **Total Capacity (jobs)** | | **28,995** |
| Remaining Target (2018-2035) | | 6,344 |
| **Surplus/Deficit Capacity (jobs)** | | **22,651** |



# City of Kirkland

## Housing Growth and Residential Development Trends




| | |
|---|---|
| **Kirkland Housing Growth Target: 2006-2035** | **9,941** |
| 2006 Estimated Housing Units | 35,556 |
| 2018 Estimated Housing Units | 38,656 |
| **Estimated Housing Growth** | **3,100** |
| **Remaining 2035 Target** | **6,841** |

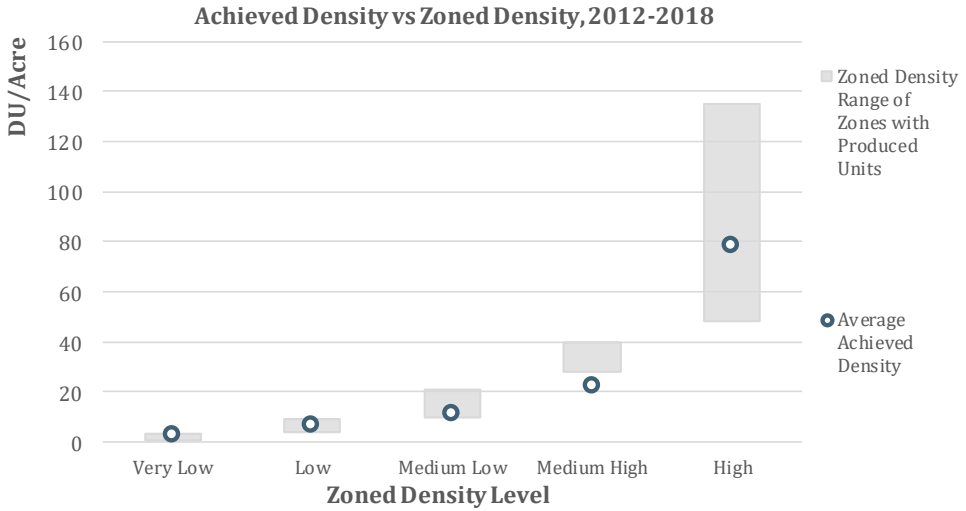
| % of Pace Needed to Achieve 2035 Housing Growth Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| 75.4% | 0.73% | 1.04% |

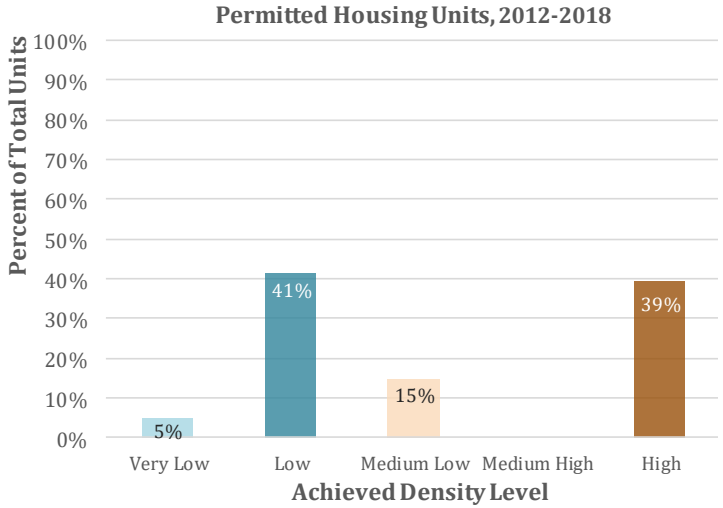
Since 2006, Kirkland has grown at 75% of the pace needed to achieve its 2035 housing growth target of 9,941 units. During this period, the total number of housing units in Kirkland grew by roughly 9%. At this current rate, Kirkland is under the production pace needed to meet its 2035 growth target, and needs to grow at an annual rate of 1% to reach its remaining target by 2035.

### Residential Achieved Densities

| Zoned Density (du/acre) | | Gross Area (acres) | Critical Areas (acres) | Public Purpose (acres) | ROWs (acres) | Net Area (acres) | Total Units | Achieved Density (DU/acre) |
|---|---|---|---|---|---|---|---|---|
| **Very Low** | 0 - 4 du/acre | 5.9 | 0.1 | 0.0 | 0.0 | 5.8 | 17 | **2.9** |
| **Low** | 4 - 10 du/acre | 146.8 | 5.5 | 0.0 | 0.0 | 141.2 | 888 | **6.3** |
| **Medium Low** | 10 - 24 du/acre | 17.1 | 1.2 | 0.0 | 0.0 | 15.9 | 177 | **11.1** |
| **Medium High** | 24 - 48 du/acre | 2.3 | 0.0 | 0.0 | 0.0 | 2.3 | 50 | **21.9** |
| **High** | 48 & up du/acre | 9.0 | 0.0 | 0.0 | 0.0 | 9.0 | 705 | **78.4** |
| | **Total** | **181.1** | **6.9** | **0.0** | **0.0** | **174.2** | **1,837** | **10.5** |

| Achieved Density Level | Net Area (acres) | Total Units |
|---|---|---|
| **Very Low** | 24.6 | 86 |
| **Low** | 118.0 | 759 |
| **Medium Low** | 22.5 | 271 |
| **Medium High** | 0.0 | 0 |
| **High** | 9.1 | 721 |
| **Total** | **174.2** | **1,837** |



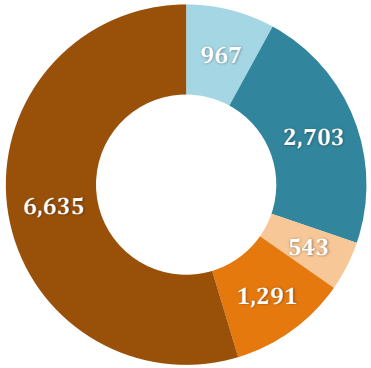



## Kirkland – Residential Land Supply and Capacity

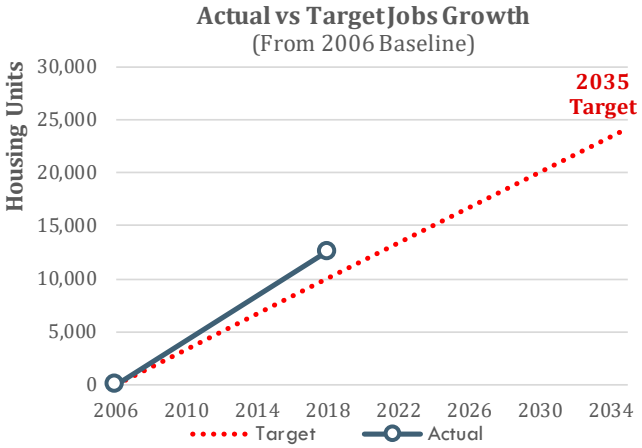
| Assumed Density Level | Vacant/ Redevelopable | Gross Acres | Critical Areas | Infrastructure Constrained Area | ROW & Public Purpose Discount | Market Factor (low/high) | Net Available Acres | Assumed Densities (low/high - units/acre) | Net Capacity (units) |
|---|---|---|---|---|---|---|---|---|---|
| Very Low Density | Vacant Subtotal | | | | 1.68 | 7.0% - 17.0% | 88.44 | 3.9 | 265 |
| | Redev Subtotal | | | | 5.05 | 7.0% - 17.0% | 268.38 | 3.9 | 702 |
| | **Subtotal** | 545.45 | 109.43 | 0.00 | 6.73 | | 356.82 | | **967** |
| Low Density | Vacant Subtotal | | | | 2.98 | 7.0% - 17.0% | 46.15 | 4.0 / 9.3 | 305 |
| | Redev Subtotal | | | | 35.02 | 7.0% - 17.0% | 558.07 | 4.0 / 9.3 | 2,398 |
| | **Subtotal** | 828.95 | 58.12 | 0.00 | 37.99 | | 604.22 | | **2,703** |
| Medium Low Density | Vacant Subtotal | | | | 0.16 | 7.0% - 17.0% | 3.55 | 10.0 / 21.8 | 44 |
| | Redev Subtotal | | | | 1.47 | 7.0% - 17.0% | 54.22 | 10.0 / 21.8 | 499 |
| | **Subtotal** | 77.69 | 11.86 | 0.00 | 1.63 | | 57.77 | | **543** |
| Medium High Density | Vacant Subtotal | | | | 0.03 | 7.0% - 7.0% | 1.31 | 28.0 / 40.0 | 47 |
| | Redev Subtotal | | | | 0.88 | 7.0% - 7.0% | 40.26 | 28.0 / 40.0 | 1,244 |
| | **Subtotal** | 48.90 | 3.21 | 0.00 | 0.91 | | 41.57 | | **1,291** |
| High Density | Vacant Subtotal | | | | 0.07 | 7.0% - 7.0% | 3.19 | 48.0 / 135.0 | 324 |
| | Redev Subtotal | | | | 1.63 | 7.0% - 7.0% | 74.35 | 48.0 / 135.0 | 6,312 |
| | **Subtotal** | 95.32 | 4.37 | 0.00 | 1.70 | | 77.55 | | **6,635** |
| All Zones | Vacant Total | | | | 4.92 | | 142.65 | | 985 |
| | Redev Total | | | | 44.05 | | 995.29 | | 11,155 |
| | **Total** | **1,596.31** | **186.99** | **0.00** | **48.97** | | **1,137.93** | | **12,140** |

| Capacity (units) | |
|---|---|
| Very Low Density Zones | 967 |
| Low Density Zones | 2,703 |
| Medium Low Density Zones | 543 |
| Medium High Density Zones | 1,291 |
| High Density Zones | 6,635 |
| *Capacity in Pipeline* | *1,212* |
| **Total Capacity (Units)** | **13,352** |
| Remaining Target (2018-2035) | 6,841 |
| **Surplus/Deficit Capacity (Units)** | **6,510** |

**Housing Capacity by Density Level** (units)



# Kirkland – Employment Growth and Commercial/Industrial Development Trends




| Kirkland Jobs Growth Target: 2006-2035 | 24,186 |
|---|---|
| 2006 Jobs (PSRC) | 36,698 |
| 2018 Jobs (PSRC) | 49,280 |
| **Total Jobs Growth** | **12,582** |
| **Remaining 2035 Target** | **11,604** |

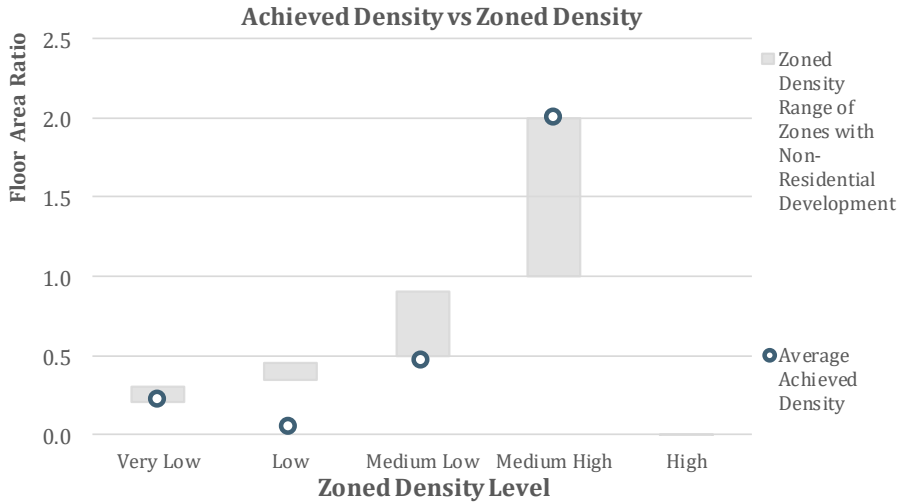
| % of Pace Needed to Achieve 2035 Jobs Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| 125.7% | 2.86% | 1.39% |

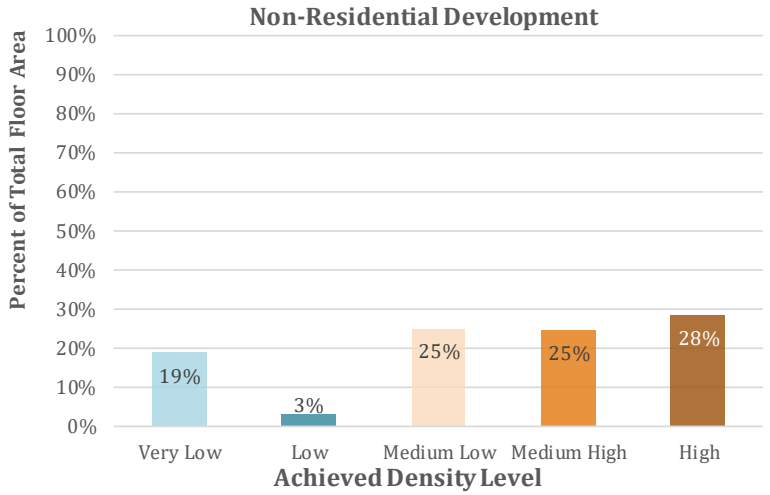
Since 2006, Kirkland has grown at 126% of the pace needed to achieve its 2035 jobs growth target of 24,186 units. During this period, the total number of jobs in Kirkland grew by roughly 34%. At this current rate, Kirkland is over the pace needed to meet its 2035 jobs growth target, and needs to grow at an annual rate of 1.4% to reach its remaining target by 2035.

## Non-Residential Achieved Densities

| Zoned Density (FAR) | | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|---|
| **Very Low** | 0 - 0.35 FAR | 1,125,119 | 242,666 | **0.2** |
| **Low** | 0.35 - 0.5 FAR | 186,909 | 7,394 | **0.0** |
| **Medium Low** | 0.5 - 1.0 FAR | 391,250 | 183,070 | **0.5** |
| **Medium High** | 1.0 - 3.0 FAR | 99,857 | 199,942 | **2.0** |
| **High** | 3.0 & up FAR | 0 | 0 | |
| | **Total** | **1,803,134** | **633,072** | **0.4** |

| Achieved Density Level | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|
| **Very Low** | 1,439,813 | 118,814 | **0.1** |
| **Low** | 55,383 | 20,604 | **0.4** |
| **Medium Low** | 183,884 | 159,369 | **0.9** |
| **Medium High** | 98,507 | 156,492 | **1.6** |
| **High** | 40,012 | 180,793 | **4.5** |
| **Total** | **1,817,597** | **636,072** | **0.3** |




*Note: Ranges are based on the maximum allowable density of zones within each category*

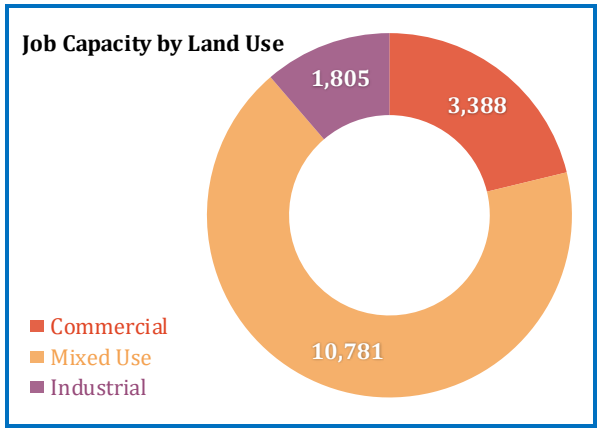
## Kirkland – Commercial/Industrial Land Supply and Job Capacity

| Land Supply | Gross Area (acres) | Critical Areas (acres) | ROWs (acres) | Public Purpose (acres) | Initial Land Supply | Market Factor | Buildable Area (acres) |
|---|---|---|---|---|---|---|---|
| **Vacant / Redev.** | | | | | | | |
| Commercial | 87.3 | 11.0 | 1.5 | 0.0 | 74.8 | 5% | 71.0 |
| Mixed Use | 191.8 | 16.2 | 3.5 | 0.0 | 172.1 | 7% - 17% | 159.7 |
| Industrial | 1.1 | 1.1 | 0.0 | 0.0 | 0.0 | 0% | 0.0 |
| **Non-Res Land Total** | **280.2** | **28.3** | **5.0** | **0.0** | **267.7** | | **230.7** |

| Job Capacity by Land Use | Net Buildable Area (mil.sq.ft.) | Assumed Density Range (FAR) | Existing Floor Area (million sq.ft.) | Floor Area Capac. (million sq.ft.) | Sq. ft. per Job | Job Capacity |
|---|---|---|---|---|---|---|
| **Commercial** | | | | | | |
| Vacant | 0.61 | 0.02 / 1.80 | 0.00 | 0.14 | 250 | 561 |
| Redevelopable | 2.48 | 0.02 / 1.80 | 0.47 | 0.71 | 250 | 2827 |
| **Commercial Total** | **3.09** | **0.02 / 1.80** | **0.47** | **0.85** | **250** | **3,388** |
| **Mixed-Use** | | | | | | |
| Vacant | 0.21 | 0.02 / 4.52 | 0.00 | 0.13 | 300 | 435 |
| Redevelopable | 6.75 | 0.02 / 4.52 | 1.68 | 3.10 | 300 | 10346 |
| **Mixed Use Total** | **6.96** | **0.02 / 4.52** | **1.68** | **3.23** | **300** | **10,781** |
| **Industrial*** | | | | | | |
| Vacant | 0.01 | 0.88 | 0.00 | 0.01 | 300 | 30 |
| Redevelopable | 0.83 | 0.88 | 0.20 | 0.53 | 300 | 1775 |
| **Industrial Total** | **0.84** | **0.88** | **0.20** | **0.54** | **300** | **1,805** |
| **City Total** | | | | | | |
| Commercial | 3.09 | 0.02 / 1.80 | 0.69 | 0.85 | 250 | 3,388 |
| Mixed Use | 6.96 | 0.02 / 4.52 | 0.91 | 3.23 | 300 | 10,781 |
| Industrial | 0.84 | 0.88 | 0.26 | 0.54 | 300 | 1,805 |
| *Job Capacity in Pipeline* | | | | | | *2,165* |
| **City Total** | **10.89** | **0.02 / 4.52** | **1.86** | **4.62** | **250 / 300** | **18,139** |

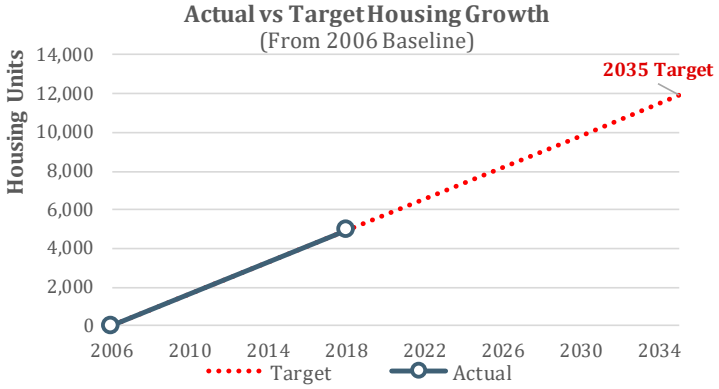
*Certain zones grouped as industrial allow for commercial use.

| Job Capacity by Assumed Density Level | # | % |
|---|---|---|
| Very Low Density | 525 | 3% |
| Low Density | 1,206 | 8% |
| Medium Low Density | 5,636 | 35% |
| Medium High Density | 6,692 | 42% |
| High Density | 1,914 | 12% |
| | | |
| *Capacity in Pipeline* | | *2,165* |
| **Total Capacity (jobs)** | | **18,139** |
| Remaining Target (2018-2035) | | 11,604 |
| **Surplus/Deficit Capacity (jobs)** | | **6,535** |



# City of Redmond

## Housing Growth and Residential Development Trends




| Redmond Housing Growth Target: 2006-2035 | 11,896 |
|---|---|
| 2006 Estimated Housing Units | 22,790 |
| 2018 Estimated Housing Units | 27,736 |
| **Estimated Housing Growth** | **4,946** |
| **Remaining 2035 Target** | **6,950** |

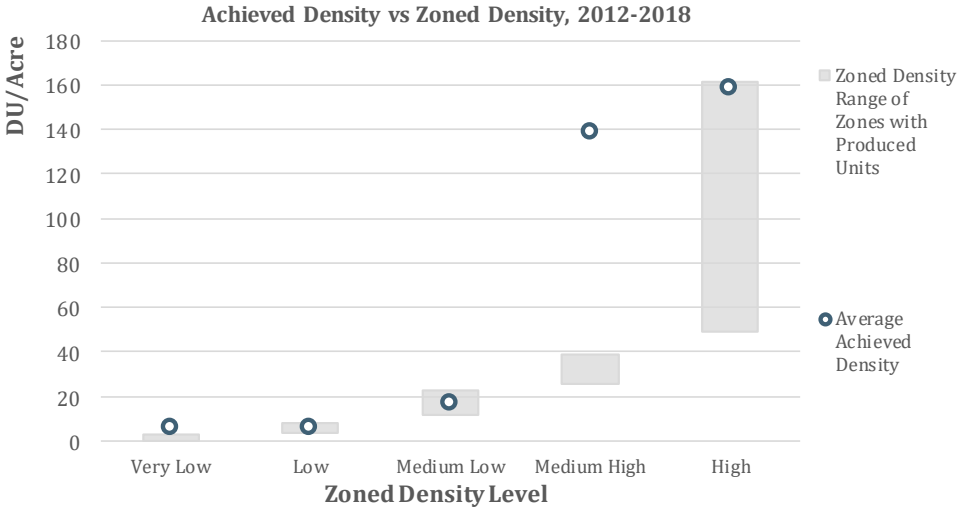
| % of Pace Needed to Achieve 2035 Housing Growth Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| 100.5% | 1.81% | 1.47% |

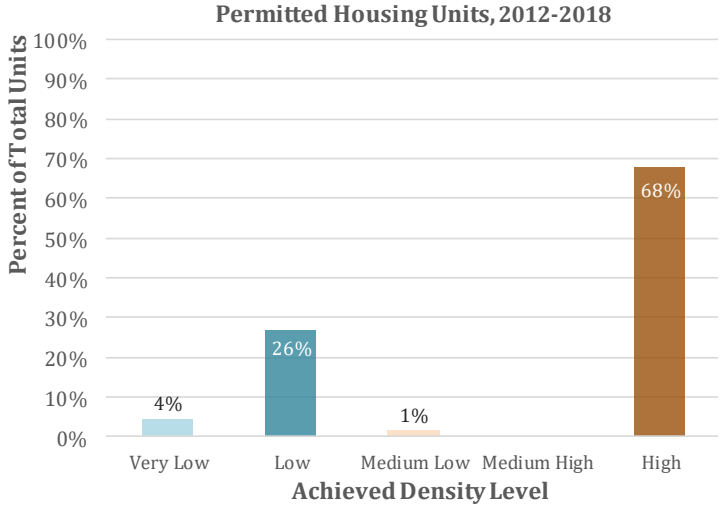
Since 2006, Redmond has grown at 100% of the pace needed to achieve its 2035 housing growth target of 11,896 units. During this period, the total number of housing units in Redmond grew by roughly 22%. At this current rate, Redmond is over the production pace needed to meet its 2035 growth target, and needs to grow at an annual rate of 1.5% to reach its remaining target by 2035.

### Residential Achieved Densities

| Zoned Density (du/acre) | | Gross Area (acres) | Critical Areas (acres) | Public Purpose (acres) | ROWs (acres) | Net Area (acres) | Total Units | Achieved Density (DU/acre) |
|---|---|---|---|---|---|---|---|---|
| Very Low | 0 - 4 du/acre | 3.0 | 0.0 | 0.0 | 0.0 | 3.0 | 17 | **5.6** |
| Low | 4 - 10 du/acre | 179.1 | 3.2 | 0.0 | 0.0 | 175.9 | 1,099 | **6.2** |
| Medium Low | 10 - 24 du/acre | 2.6 | 0.0 | 0.0 | 0.0 | 2.6 | 44 | **16.7** |
| Medium High | 24 - 48 du/acre | 13.4 | 0.0 | 0.0 | 0.0 | 13.4 | 1,859 | **138.4** |
| High | 48 & up du/acre | 3.0 | 0.0 | 0.0 | 0.0 | 3.0 | 482 | **158.5** |
| | **Total** | **201.2** | **3.2** | **0.0** | **0.0** | **198.0** | **3,501** | **17.7** |

| Achieved Density Level | Net Area (acres) | Total Units |
|---|---|---|
| Very Low | 46.8 | 162 |
| Low | 132.1 | 954 |
| Medium Low | 2.9 | 51 |
| Medium High | 0.0 | 0 |
| High | 17.8 | 2,439 |
| **Total** | **199.7** | **3,606** |



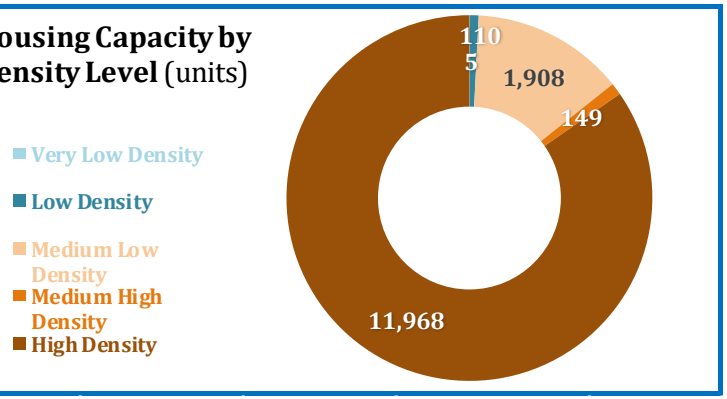



## Redmond - Residential Land Supply and Capacity

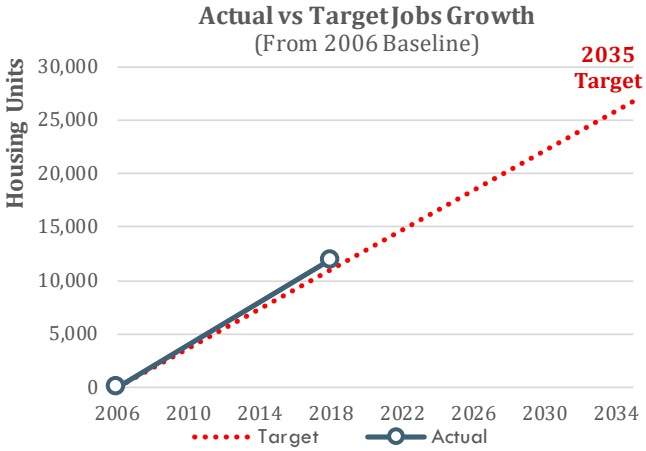
| Assumed Density Level | Vacant/ Redevelopable | Gross Acres | Critical Areas | Infrastructure Constrained Area | ROW & Public Purpose Discount | Market Factor (low/high) | Net Available Acres | Assumed Densities (low/high - units/acre) | Net Capacity (units) |
|---|---|---|---|---|---|---|---|---|---|
| Very Low Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 0.62 | 10.0% - 10.0% | 3.08 | 0.1 / 3.0 | 5 |
| | **Subtotal** | 209.70 | 193.62 | 9.50 | 0.62 | | 3.08 | | **5** |
| Low Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 12.35 | 10.0% - 10.0% | 61.74 | 4.0 / 9.4 | 110 |
| | **Subtotal** | 493.36 | 212.07 | 162.87 | 12.35 | | 61.74 | | **110** |
| Medium Low Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 10.38 | 5.0% - 10.0% | 89.30 | 12.0 / 23.0 | 1,908 |
| | **Subtotal** | 201.95 | 29.85 | 0.49 | 10.38 | | 89.30 | | **1,908** |
| Medium High Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 0.88 | 7.0% - 7.0% | 7.27 | 39.2 / 43.6 | 149 |
| | **Subtotal** | 10.15 | 0.00 | 0.00 | 0.88 | | 7.27 | | **149** |
| High Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 13.82 | 5.0% - 10.0% | 115.93 | 49.2 / 161.2 | 11,968 |
| | **Subtotal** | 149.35 | 2.61 | 1.35 | 13.82 | | 115.93 | | **11,968** |
| All Zones | Vacant Total | | | | 0.00 | | 0.00 | | 0 |
| | Redev Total | | | | 38.04 | | 277.31 | | 14,141 |
| | **Total** | **1,064.52** | **438.15** | **174.21** | **38.04** | | **277.31** | | **14,141** |

| Capacity (units) | |
|---|---|
| Very Low Density Zones | 5 |
| Low Density Zones | 110 |
| Medium Low Density Zones | 1,908 |
| Medium High Density Zones | 149 |
| High Density Zones | 11,968 |
| *Capacity in Pipeline* | *1,964* |
| | |
| **Total Capacity (Units)** | **16,105** |
| Remaining Target (2018-2035) | 6,886 |
| **Surplus/Deficit Capacity (Units)** | **9,219** |

**Housing Capacity by Density Level** (units)



# Redmond - Employment Growth and Commercial/Industrial Development Trends




| Redmond Jobs Growth Target: 2006-2035 | 26,680 |
|---|---|
| 2006 Jobs (PSRC) | 81,207 |
| 2018 Jobs (PSRC) | 93,174 |
| **Total Jobs Growth** | **11,967** |
| Remaining 2035 Target | 14,713 |

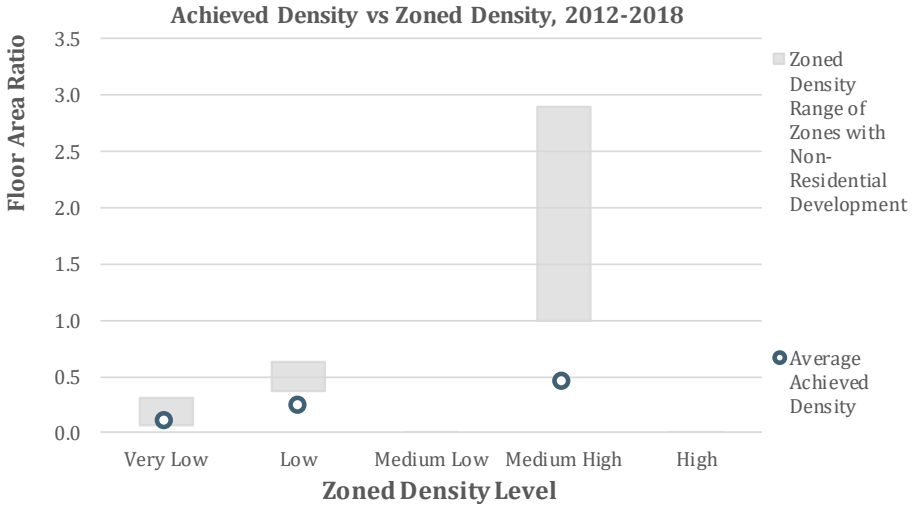
| % of Pace Needed to Achieve 2035 Jobs Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| 108.4% | 1.23% | 0.93% |

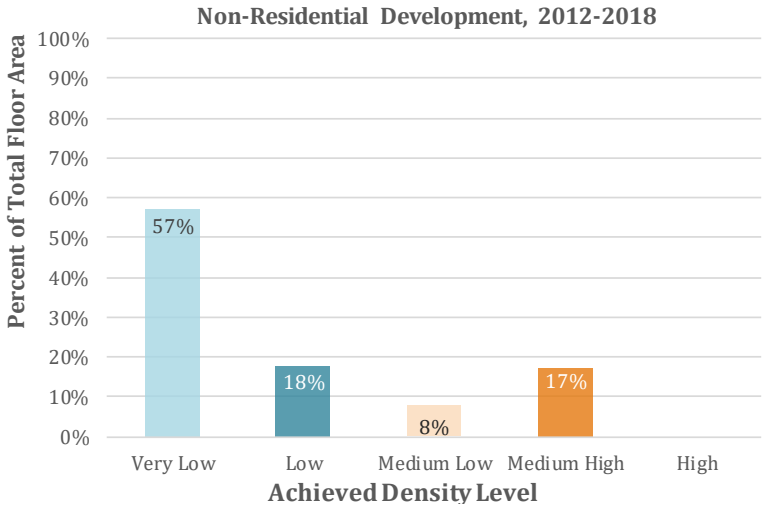
Since 2006, Redmond has grown at 108% of the pace needed to achieve its 2035 jobs growth target of 26,680 units. During this period, the total number of jobs in Redmond grew by roughly 15%. At this current rate, Redmond is over the pace needed to meet its 2035 jobs growth target, and needs to grow at an annual rate of 0.9% to reach its remaining target by 2035.

## Non-Residential Achieved Densities

| Zoned Density (FAR) | | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|---|
| Very Low | 0 - 0.35 FAR | 4,021,624 | 375,664 | 0.1 |
| Low | 0.35 - 0.5 FAR | 2,257,096 | 544,282 | 0.2 |
| Medium Low | 0.5 - 1.0 FAR | 0 | 0 | |
| Medium High | 1.0 - 3.0 FAR | 1,742,591 | 783,948 | 0.4 |
| High | 3.0 & up FAR | 0 | 0 | |
| | Total | 8,021,311 | 1,703,894 | 0.2 |

| Achieved Density Level | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|
| Very Low | 7,551,156 | 1,022,721 | 0.1 |
| Low | 664,724 | 318,430 | 0.5 |
| Medium Low | 226,315 | 136,034 | 0.6 |
| Medium High | 206,450 | 310,063 | 1.5 |
| High | 0 | 0 | 0.0 |
| Total | 8,648,644 | 1,787,248 | 0.2 |



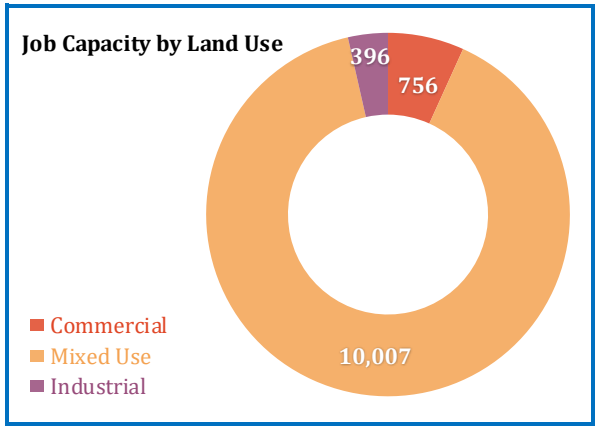



## Redmond - Commercial/Industrial Land Supply and Job Capacity

| Land Supply | Gross Area (acres) | Critical Areas (acres) | ROWs (acres) | Public Purpose (acres) | Initial Land Supply | Market Factor | Buildable Area (acres) |
|---|---|---|---|---|---|---|---|
| **Vacant / Redev.** | | | | | | | |
| Commercial | 177.6 | 111.2 | 0.0 | 0.0 | 66.4 | 5% - 10% | 63.0 |
| Mixed Use | 377.4 | 54.5 | 16.1 | 16.1 | 290.8 | 5% - 10% | 271.7 |
| Industrial | 134.4 | 32.5 | 0.0 | 0.0 | 101.9 | 35% | 66.2 |
| **Non-Res Land Total** | **689.4** | **198.1** | **16.1** | **16.1** | **464.9** | | **401.0** |

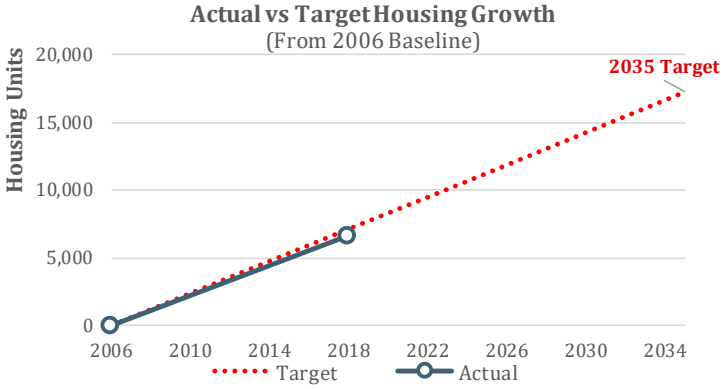
| Job Capacity by Land Use | Net Buildable Area (mil.sq.ft.) | Assumed Density Range (FAR) | Existing Floor Area (million sq.ft.) | Floor Area Capac. (million sq.ft.) | Sq. ft. per Job | Job Capacity |
|---|---|---|---|---|---|---|
| **Commercial** | | | | | | |
| Vacant | 0.33 | 0.03 / 0.60 | 0.00 | 0.06 | 300 / 330 | 181 |
| Redevelopable | 2.42 | 0.03 / 0.60 | 0.39 | 0.19 | 300 / 330 | 575 |
| **Commercial Total** | **2.74** | **0.03 / 0.60** | **0.39** | **0.25** | **300 / 330** | **756** |
| **Mixed-Use** | | | | | | |
| Vacant | 3.09 | 0.05 / 1.13 | 0.00 | 1.21 | 300 / 730 | 3,930 |
| Redevelopable | 8.75 | 0.05 / 1.13 | 3.05 | 1.85 | 300 / 730 | 6077 |
| **Mixed Use Total** | **11.84** | **0.05 / 1.13** | **3.05** | **3.05** | **300 / 730** | **10,007** |
| **Industrial** | | | | | | |
| Vacant | 0.57 | 0.24 / 0.50 | 0.00 | 0.16 | 730 | 224 |
| Redevelopable | 2.31 | 0.24 / 0.50 | 0.67 | 0.13 | 730 | 171 |
| **Industrial Total** | **2.88** | **0.24 / 0.50** | **0.67** | **0.29** | **730** | **396** |
| **City Total** | | | | | | |
| Commercial | 2.74 | 0.03 / 0.60 | 0.69 | 0.25 | 300 / 330 | 756 |
| Mixed Use | 11.84 | 0.05 / 1.13 | 0.91 | 3.05 | 300 / 730 | 10,007 |
| Industrial | 2.88 | 0.24 / 0.50 | 0.26 | 0.29 | 730 | 396 |
| *Job Capacity in Pipeline* | | | | | | *4,693* |
| **City Total** | **17.47** | **0.03 / 1.13** | **1.86** | **3.59** | **300 / 730** | **15,851** |

| Job Capacity by Assumed Density Level | # | % |
|---|---|---|
| Very Low Density | 1,505 | 13% |
| Low Density | 8,656 | 78% |
| Medium Low Density | 997 | 9% |
| Medium High Density | 0 | 0% |
| High Density | 0 | 0% |
| | | |
| *Capacity in Pipeline* | | *4,693* |
| **Total Capacity (jobs)** | | **15,851** |
| Remaining Target (2018-2035) | | 14,713 |
| **Surplus/Deficit Capacity (jobs)** | | **1,138** |



# City of Renton

## Housing Growth and Residential Development Trends




| Renton Housing Growth Target: 2006-2035 | 17,231 |
|---|---|
| 2006 Estimated Housing Units | 36,168 |
| 2018 Estimated Housing Units | 42,775 |
| **Estimated Housing Growth** | **6,607** |
| Remaining 2035 Target | 10,623 |

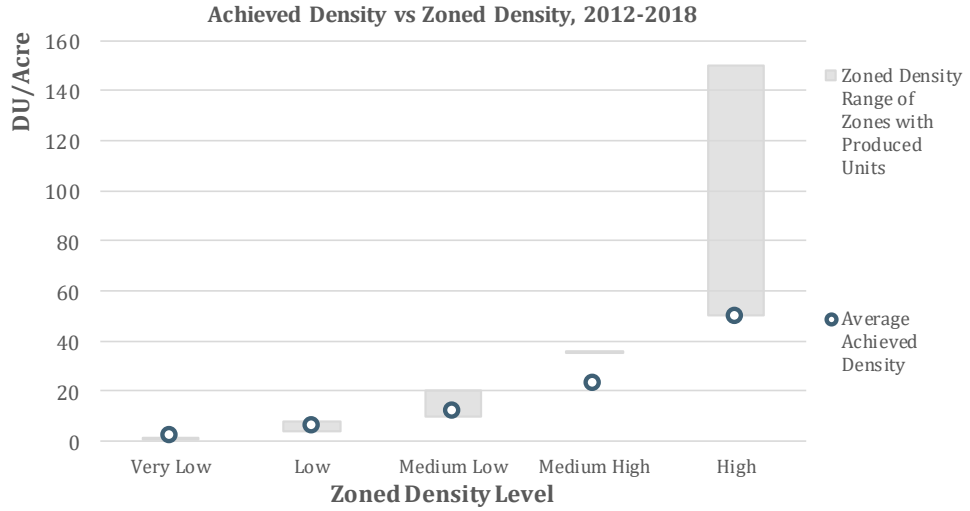
| % of Pace Needed to Achieve 2035 Housing Growth Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| 92.7% | 1.52% | 1.46% |

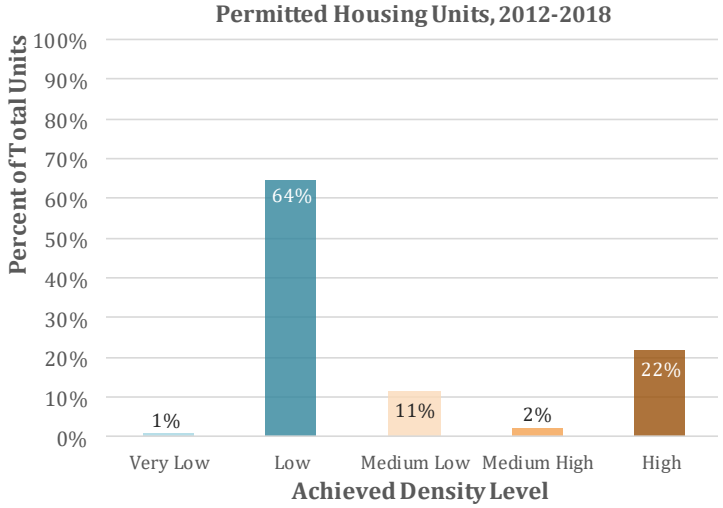
Since 2006, Renton has grown at 93% of the pace needed to achieve its 2035 housing growth target of 17,231 units. During this period, the total number of housing units in Renton grew by roughly 18%. At this current rate, Renton is under the production pace needed to meet its 2035 growth target, and needs to grow at an annual rate of 1.5% to reach its remaining target by 2035.

### Residential Achieved Densities

| Zoned Density (du/acre) | | Gross Area (acres) | Critical Areas (acres) | Public Purpose (acres) | ROWs (acres) | Net Area (acres) | Total Units | Achieved Density (DU/acre) |
|---|---|---|---|---|---|---|---|---|
| Very Low | 0 - 4 du/acre | 14.8 | 2.7 | 3.9 | 0.0 | 8.2 | 16 | **2.0** |
| Low | 4 - 10 du/acre | 378.1 | 45.4 | 13.0 | 50.8 | 269.0 | 1,550 | **5.8** |
| Medium Low | 10 - 24 du/acre | 48.6 | 3.2 | 0.6 | 6.4 | 38.3 | 452 | **11.8** |
| Medium High | 24 - 48 du/acre | 0.2 | 0.0 | 0.0 | 0.0 | 0.2 | 5 | **22.7** |
| High | 48 & up du/acre | 17.5 | 1.8 | 0.4 | 2.7 | 12.7 | 630 | **49.6** |
| | **Total** | **459.3** | **53.1** | **17.9** | **59.9** | **328.4** | **2,653** | **8.1** |

| Achieved Density Level | Net Area (acres) | Total Units |
|---|---|---|
| Very Low | 8.2 | 16 |
| Low | 288.9 | 1,707 |
| Medium Low | 18.7 | 300 |
| Medium High | 2.0 | 54 |
| High | 10.7 | 576 |
| **Total** | **328.4** | **2,653** |



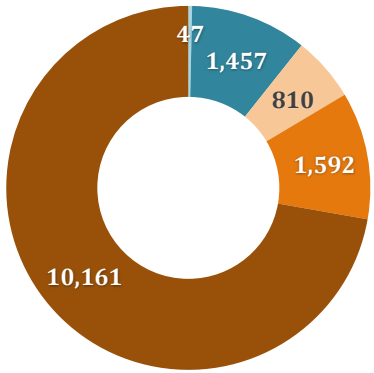



## Renton - Residential Land Supply and Capacity

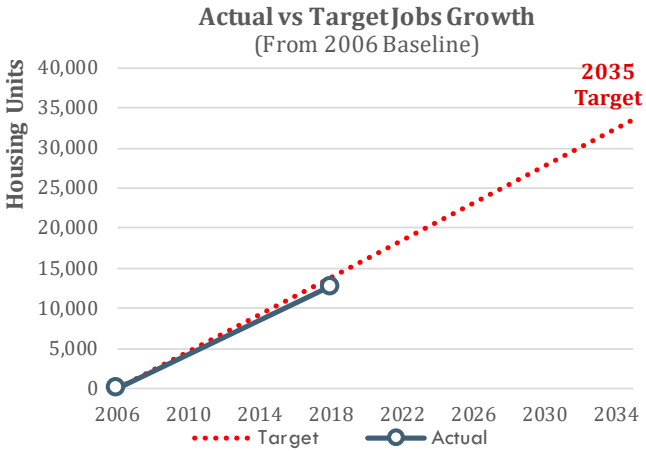
| Assumed Density Level | Vacant/ Redevelopable | Gross Acres | Critical Areas | Infrastructure Constrained Area | ROW & Public Purpose Discount | Market Factor (low/high) | Net Available Acres | Assumed Densities (low/high - units/acre) | Net Capacity (units) |
|---|---|---|---|---|---|---|---|---|---|
| Very Low Density | Vacant Subtotal | | | | 11.89 | 14.0% - 14.0% | 25.98 | 0.2 / 2.0 | 32 |
| | Redev Subtotal | | | | 6.61 | 14.0% - 14.0% | 14.44 | 0.2 / 2.0 | 15 |
| | **Subtotal** | 106.75 | 38.24 | 0.00 | 18.50 | | 40.43 | | **47** |
| Low Density | Vacant Subtotal | | | | 65.20 | 10.0% - 35.0% | 152.17 | 5.4 / 8.2 | 906 |
| | Redev Subtotal | | | | 106.67 | 10.0% - 35.0% | 249.35 | 5.4 / 8.2 | 551 |
| | **Subtotal** | 693.07 | 53.16 | 0.00 | 171.87 | | 401.52 | | **1,457** |
| Medium Low Density | Vacant Subtotal | | | | 11.79 | 15.0% - 35.0% | 34.23 | 10.2 / 17.4 | 443 |
| | Redev Subtotal | | | | 11.66 | 15.0% - 35.0% | 35.28 | 10.2 / 17.4 | 367 |
| | **Subtotal** | 137.60 | 20.32 | 0.00 | 23.46 | | 69.51 | | **810** |
| Medium High Density | Vacant Subtotal | | | | 2.58 | 15.0% - 15.0% | 24.86 | 41.0 | 1,018 |
| | Redev Subtotal | | | | 1.46 | 15.0% - 15.0% | 14.01 | 41.0 | 574 |
| | **Subtotal** | 56.61 | 3.47 | 0.00 | 4.04 | | 38.87 | | **1,592** |
| High Density | Vacant Subtotal | | | | 4.09 | 11.0% - 21.0% | 38.78 | 54.3 / 112.5 | 3,438 |
| | Redev Subtotal | | | | 9.39 | 11.0% - 21.0% | 90.39 | 54.3 / 112.5 | 6,724 |
| | **Subtotal** | 421.82 | 28.69 | 0.00 | 13.48 | | 129.17 | | **10,161** |
| All Zones | Vacant Total | | | | 95.55 | | 276.03 | | 5,836 |
| | Redev Total | | | | 135.79 | | 403.48 | | 8,231 |
| | **Total** | **1,415.85** | **143.87** | **0.00** | **231.34** | | **679.50** | | **14,067** |

| Capacity (units) | |
|---|---|
| Very Low Density Zones | 47 |
| Low Density Zones | 1,457 |
| Medium Low Density Zones | 810 |
| Medium High Density Zones | 1,592 |
| High Density Zones | 10,161 |
| *Capacity in Pipeline* | *2,436* |
| | |
| **Total Capacity (Units)** | **16,503** |
| Remaining Target (2018-2035) | 10,601 |
| **Surplus/Deficit Capacity (Units)** | **5,902** |

**Housing Capacity by Density Level** (units)



# Renton - Employment Growth and Commercial/Industrial Development Trends




| Renton Jobs Growth Target: 2006-2035 | 33,640 |
|---|---|
| 2006 Jobs (PSRC) | 53,431 |
| 2018 Jobs (PSRC) | 66,151 |
| **Total Jobs Growth** | **12,720** |
| Remaining 2035 Target | 20,920 |

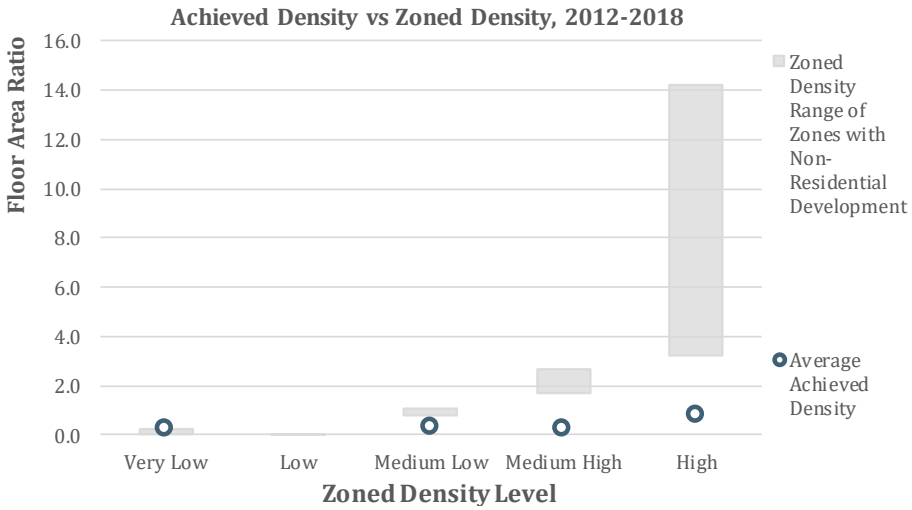
| % of Pace Needed to Achieve 2035 Jobs Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| 91.4% | 1.98% | 1.86% |

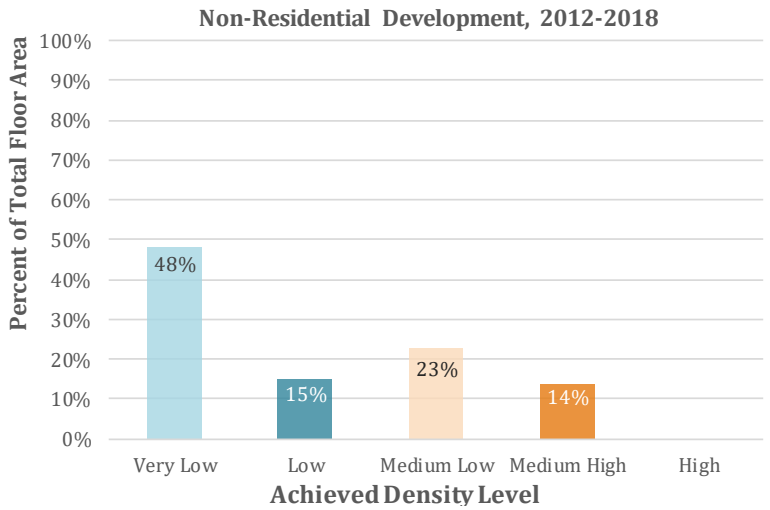
Since 2006, Renton has grown at 91% of the pace needed to achieve its 2035 jobs growth target of 33,640 units. During this period, the total number of jobs in Renton grew by roughly 24%. At this current rate, Renton is under the pace needed to meet its 2035 jobs growth target, and needs to grow at an annual rate of 1.9% to reach its remaining target by 2035.

## Non-Residential Achieved Densities

| Zoned Density (FAR) | | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|---|
| Very Low | 0 - 0.35 FAR | 387,403 | 88,225 | 0.2 |
| Low | 0.35 - 0.5 FAR | 0 | 0 | |
| Medium Low | 0.5 - 1.0 FAR | 47,532 | 13,171 | 0.3 |
| Medium High | 1.0 - 3.0 FAR | 7,136,894 | 1,913,364 | 0.3 |
| High | 3.0 & up FAR | 1,518,735 | 1,167,138 | 0.8 |
| | Total | 9,090,564 | 3,181,898 | 0.4 |

| Achieved Density Level | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|
| Very Low | 6,324,143 | 1,530,240 | 0.2 |
| Low | 1,258,936 | 486,520 | 0.4 |
| Medium Low | 1,347,460 | 723,882 | 0.5 |
| Medium High | 160,025 | 441,256 | 2.8 |
| High | 0 | 0 | 0.0 |
| Total | 9,090,564 | 3,181,898 | 0.4 |



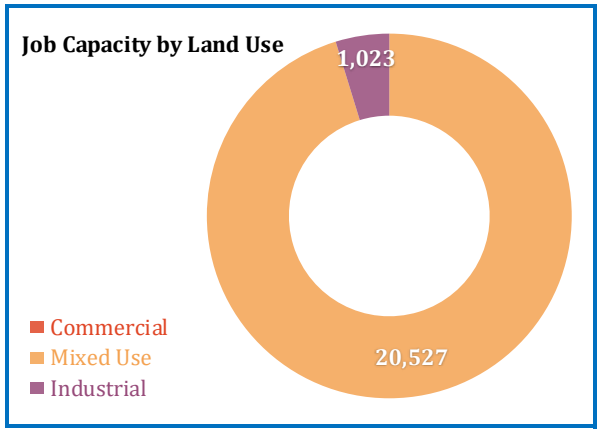



## Renton - Commercial/Industrial Land Supply and Job Capacity

| Land Supply | Gross Area (acres) | Critical Areas (acres) | ROWs (acres) | Public Purpose (acres) | Initial Land Supply | Market Factor | Buildable Area (acres) |
|---|---|---|---|---|---|---|---|
| **Vacant / Redev.** | | | | | | | |
| Commercial | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0% | 0.0 |
| Mixed Use | 261.9 | 32.2 | 11.5 | 6.9 | 211.3 | 11% - 35% | 179.8 |
| Industrial | 63.6 | 2.8 | 3.0 | 1.8 | 55.9 | 20% - 30% | 41.9 |
| **Non-Res Land Total** | **325.5** | **35.0** | **14.5** | **8.7** | **267.2** | | **221.7** |

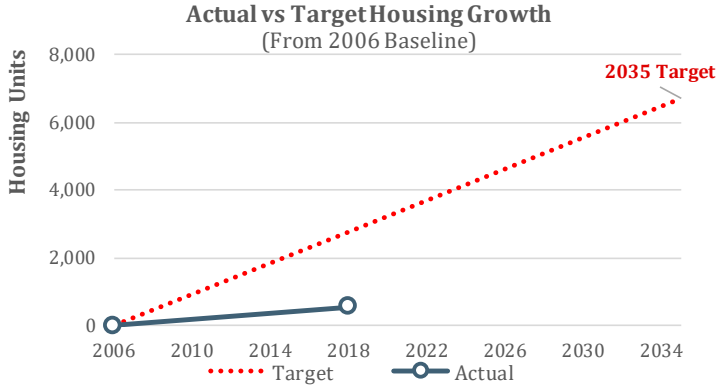
| Job Capacity by Land Use | Net Buildable Area (mil.sq.ft.) | Assumed Density Range (FAR) | Existing Floor Area (million sq.ft.) | Floor Area Capac. (million sq.ft.) | Sq. ft. per Job | Job Capacity |
|---|---|---|---|---|---|---|
| **Commercial** | | | | | | |
| Vacant | 0.00 | 0.00 | 0.00 | 0.00 | 0 | 0 |
| Redevelopable | 0.00 | 0.00 | 0.00 | 0.00 | 0 | 0 |
| **Commercial Total** | **0.00** | **0.00** | **0.00** | **0.00** | **0** | **0** |
| **Mixed-Use** | | | | | | |
| Vacant | 3.75 | 0.28 / 4.01 | 0.00 | 3.21 | 250 / 400 | 12,415 |
| Redevelopable | 4.08 | 0.28 / 4.01 | 0.59 | 2.22 | 250 / 400 | 8112 |
| **Mixed Use Total** | **7.83** | **0.28 / 4.01** | **0.59** | **5.44** | **250 / 400** | **20,527** |
| **Industrial** | | | | | | |
| Vacant | 0.88 | 0.20 / 0.39 | 0.00 | 0.32 | 450 / 700 | 688 |
| Redevelopable | 0.95 | 0.20 / 0.39 | 0.14 | 0.20 | 450 / 700 | 336 |
| **Industrial Total** | **1.82** | **0.20 / 0.39** | **0.14** | **0.52** | **450 / 700** | **1,023** |
| **City Total** | | | | | | |
| Commercial | 0.00 | 0.00 | 0.69 | 0.00 | 0 | 0 |
| Mixed Use | 7.83 | 0.28 / 4.01 | 0.91 | 5.44 | 250 / 400 | 20,527 |
| Industrial | 1.82 | 0.20 / 0.39 | 0.26 | 0.52 | 450 / 700 | 1,023 |
| *Job Capacity in Pipeline* | | | | | | *4,660* |
| **City Total** | **9.66** | **4.01** | **1.86** | **5.96** | **0 / 700** | **26,210** |

| Job Capacity by Assumed Density Level | # | % |
|---|---|---|
| Very Low Density | 2,989 | 14% |
| Low Density | 1,012 | 5% |
| Medium Low Density | 5,109 | 24% |
| Medium High Density | 11,058 | 51% |
| High Density | 1,382 | 6% |
| | | |
| *Capacity in Pipeline* | | *4,660* |
| **Total Capacity (jobs)** | | **26,210** |
| Remaining Target (2018-2035) | | 20,920 |
| **Surplus/Deficit Capacity (jobs)** | | **5,290** |



# City of SeaTac

## Housing Growth and Residential Development Trends




| | |
|---|---|
| **SeaTac Housing Growth Target: 2006-2035** | **6,728** |
| 2006 Estimated Housing Units | 10,301 |
| 2018 Estimated Housing Units | 10,849 |
| **Estimated Housing Growth** | **548** |
| **Remaining 2035 Target** | **6,180** |

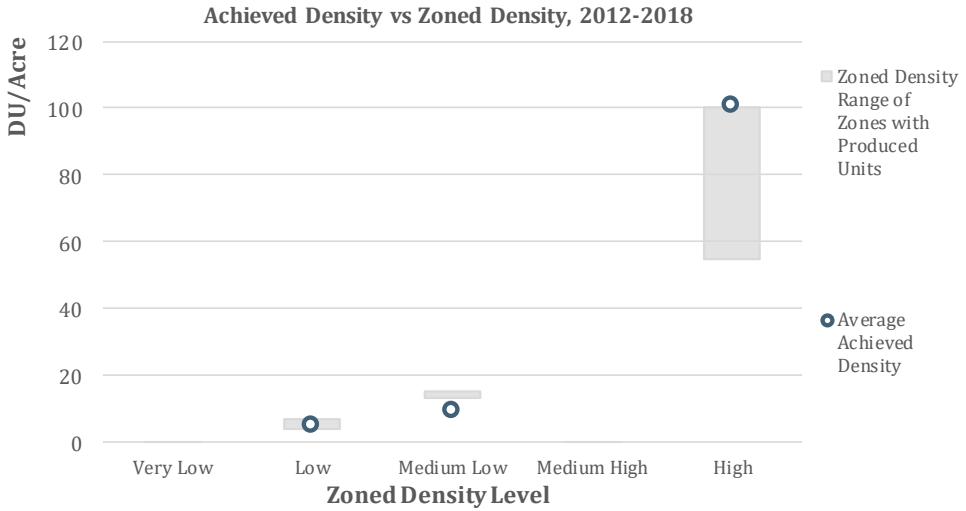
| % of Pace Needed to Achieve 2035 Housing Growth Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| **19.7%** | **0.44%** | **3.35%** |

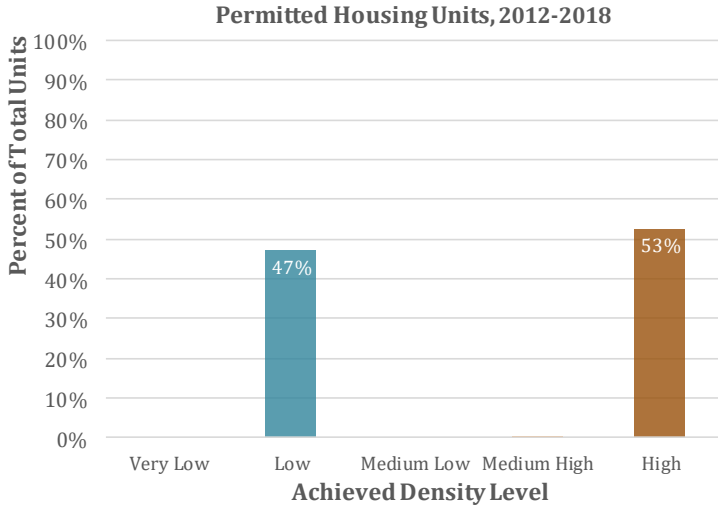
Since 2006, SeaTac has grown at 20% of the pace needed to achieve its 2035 housing growth target of 6,728 units. During this period, the total number of housing units in SeaTac grew by roughly 5%. At this current rate, SeaTac is under the production pace needed to meet its 2035 growth target, and needs to grow at an annual rate of 3.4% to reach its remaining target by 2035.

### Residential Achieved Densities

| Zoned Density (du/acre) | | Gross Area (acres) | Critical Areas (acres) | Public Purpose (acres) | ROWs (acres) | Net Area (acres) | Total Units | Achieved Density (DU/acre) |
|---|---|---|---|---|---|---|---|---|
| **Very Low** | 0 - 4 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| **Low** | 4 - 10 du/acre | 16.8 | 0.0 | 0.0 | 0.0 | 16.8 | 79 | **4.7** |
| **Medium Low** | 10 - 24 du/acre | 23.0 | 4.1 | 0.0 | 0.0 | 18.9 | 180 | **9.5** |
| **Medium High** | 24 - 48 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| **High** | 48 & up du/acre | 2.9 | 0.0 | 0.0 | 0.0 | 2.9 | 290 | **100.8** |
| | **Total** | **42.7** | **4.1** | **0.0** | **0.0** | **38.6** | **549** | **14.2** |

| Achieved Density Level | Net Area (acres) | Total Units |
|---|---|---|
| **Very Low** | 0.0 | 0 |
| **Low** | 35.7 | 259 |
| **Medium Low** | 0.0 | 0 |
| **Medium High** | 0.0 | 1 |
| **High** | 2.9 | 289 |
| **Total** | **38.6** | **549** |



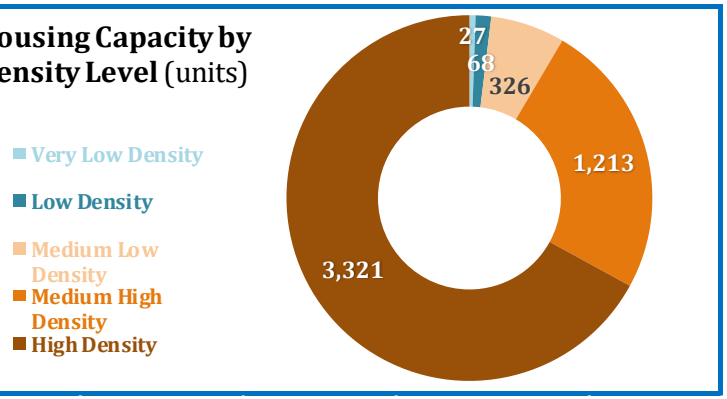



## SeaTac - Residential Land Supply and Capacity

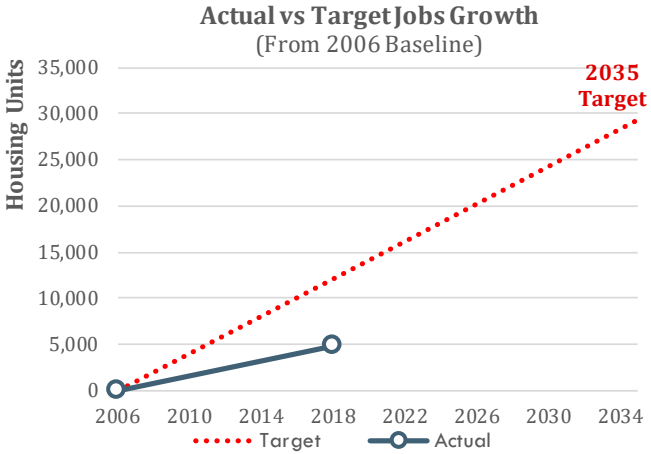
| Assumed Density Level | Vacant/ Redevelopable | Gross Acres | Critical Areas | Infrastructure Constrained Area | ROW & Public Purpose Discount | Market Factor (low/high) | Net Available Acres | Assumed Densities (low/high - units/acre) | Net Capacity (units) |
|---|---|---|---|---|---|---|---|---|---|
| Very Low Density | Vacant Subtotal | | | | 0.00 | 40.0% - 100.0% | 5.16 | 2.2 | 11 |
| | Redev Subtotal | | | | 0.00 | 40.0% - 100.0% | 19.47 | 2.2 | 16 |
| | **Subtotal** | 49.92 | 8.86 | 0.00 | 0.00 | | 24.63 | | **27** |
| Low Density | Vacant Subtotal | | | | 0.00 | 20.0% - 60.0% | 11.69 | 4.0 / 6.9 | 55 |
| | Redev Subtotal | | | | 0.00 | 20.0% - 60.0% | 131.54 | 4.0 / 6.9 | 13 |
| | **Subtotal** | 386.22 | 29.48 | 0.00 | 0.00 | | 143.23 | | **68** |
| Medium Low Density | Vacant Subtotal | | | | 0.72 | 21.0% - 50.0% | 3.00 | 12.1 / 22.0 | 51 |
| | Redev Subtotal | | | | 7.41 | 21.0% - 50.0% | 26.33 | 12.1 / 22.0 | 274 |
| | **Subtotal** | 86.80 | 32.60 | 0.00 | 8.13 | | 29.33 | | **326** |
| Medium High Density | Vacant Subtotal | | | | 5.87 | 35.0% - 75.0% | 19.99 | 26.0 / 45.0 | 827 |
| | Redev Subtotal | | | | 5.00 | 35.0% - 75.0% | 16.82 | 26.0 / 45.0 | 386 |
| | **Subtotal** | 119.60 | 22.83 | 0.00 | 10.87 | | 36.82 | | **1,213** |
| High Density | Vacant Subtotal | | | | 1.14 | 11.0% - 50.0% | 6.34 | 70.0 / 101.3 | 542 |
| | Redev Subtotal | | | | 8.48 | 11.0% - 50.0% | 32.80 | 70.0 / 101.3 | 2,779 |
| | **Subtotal** | 338.85 | 28.26 | 0.00 | 9.63 | | 39.14 | | **3,321** |
| All Zones | Vacant Total | | | | 7.73 | | 46.19 | | 1,487 |
| | Redev Total | | | | 20.89 | | 226.96 | | 3,468 |
| | **Total** | **981.39** | **122.04** | **0.00** | **28.62** | | **273.14** | | **4,955** |

| Capacity (units) | |
|---|---|
| Very Low Density Zones | 27 |
| Low Density Zones | 68 |
| Medium Low Density Zones | 326 |
| Medium High Density Zones | 1,213 |
| High Density Zones | 3,321 |
| *Capacity in Pipeline* | *1,441* |
| | |
| **Total Capacity (Units)** | **6,396** |
| Remaining Target (2018-2035) | 6,180 |
| **Surplus/Deficit Capacity (Units)** | **216** |

**Housing Capacity by Density Level** (units)



# SeaTac - Employment Growth and Commercial/Industrial Development Trends




| SeaTac Jobs Growth Target: 2006-2035 | 29,348 |
|---|---|
| 2006 Jobs (PSRC) | 29,585 |
| 2018 Jobs (PSRC) | 34,522 |
| **Total Jobs Growth** | **4,937** |
| Remaining 2035 Target | 24,411 |

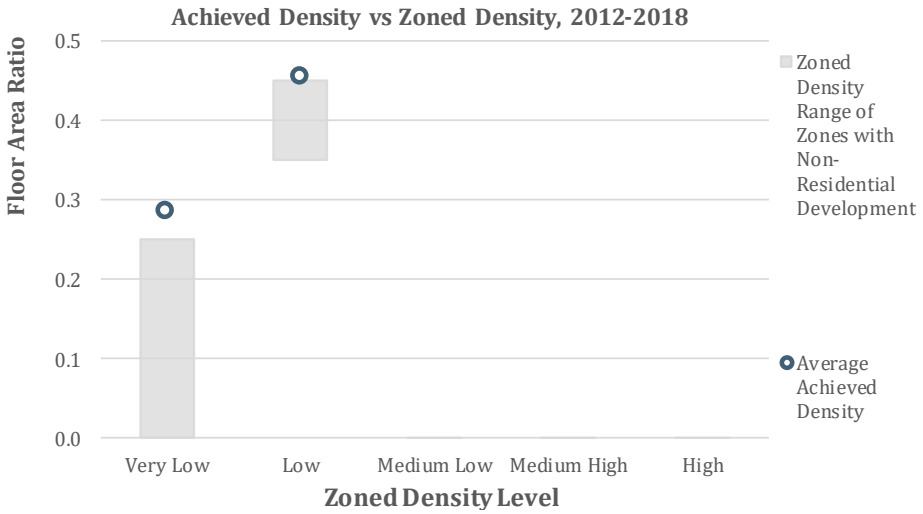
| % of Pace Needed to Achieve 2035 Jobs Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| 40.7% | 1.39% | 4.16% |

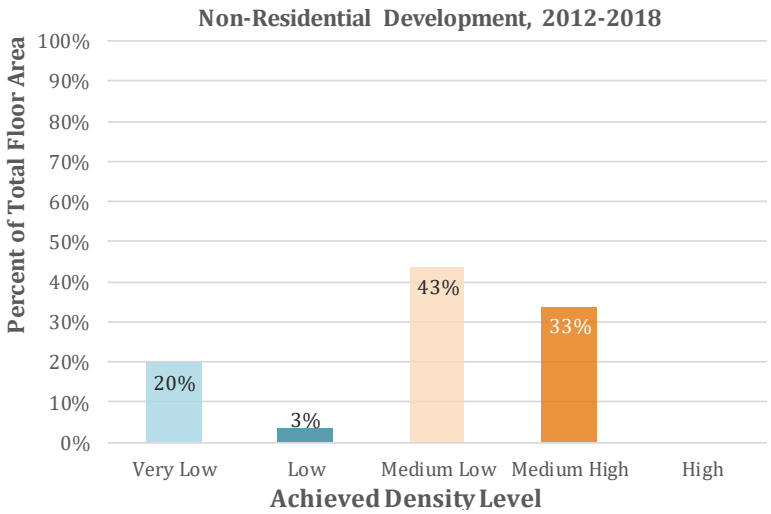
Since 2006, SeaTac has grown at 41% of the pace needed to achieve its 2035 jobs growth target of 29,348 units. During this period, the total number of jobs in SeaTac grew by roughly 17%. At this current rate, SeaTac is under the pace needed to meet its 2035 jobs growth target, and needs to grow at an annual rate of 4.2% to reach its remaining target by 2035.

## Non-Residential Achieved Densities

| Zoned Density (FAR) | | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|---|
| Very Low | 0 - 0.35 FAR | 573,564 | 164,245 | 0.3 |
| Low | 0.35 - 0.5 FAR | 19,925 | 9,050 | 0.5 |
| Medium Low | 0.5 - 1.0 FAR | 0 | 0 | |
| Medium High | 1.0 - 3.0 FAR | 0 | 0 | |
| High | 3.0 & up FAR | 0 | 0 | |
| | Total | 593,489 | 173,295 | 0.3 |

| Achieved Density Level | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|
| Very Low | 458,773 | 51,480 | 0.1 |
| Low | 19,925 | 9,050 | 0.5 |
| Medium Low | 114,791 | 112,765 | 1.0 |
| Medium High | 54,729 | 87,220 | 1.6 |
| High | 0 | 0 | 0.0 |
| Total | 648,218 | 260,515 | 0.4 |



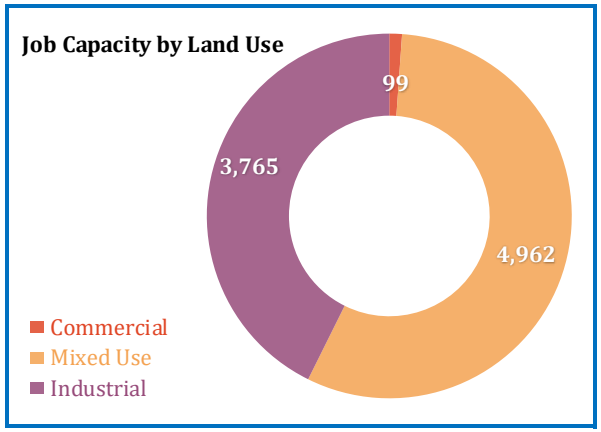



## SeaTac - Commercial/Industrial Land Supply and Job Capacity

| Land Supply | Gross Area (acres) | Critical Areas (acres) | ROWs (acres) | Public Purpose (acres) | Initial Land Supply | Market Factor | Buildable Area (acres) |
|---|---|---|---|---|---|---|---|
| **Vacant / Redev.** | | | | | | | |
| Commercial | 4.9 | 0.0 | 0.2 | 0.2 | 4.4 | 40% | 2.4 |
| Mixed Use | 187.0 | 26.3 | 8.0 | 8.0 | 144.6 | 35% - 75% | 66.2 |
| Industrial | 383.6 | 95.1 | 14.4 | 14.4 | 259.6 | 10% - 50% | 151.4 |
| **Non-Res Land Total** | **575.4** | **121.4** | **22.7** | **22.7** | **408.6** | | **220.0** |

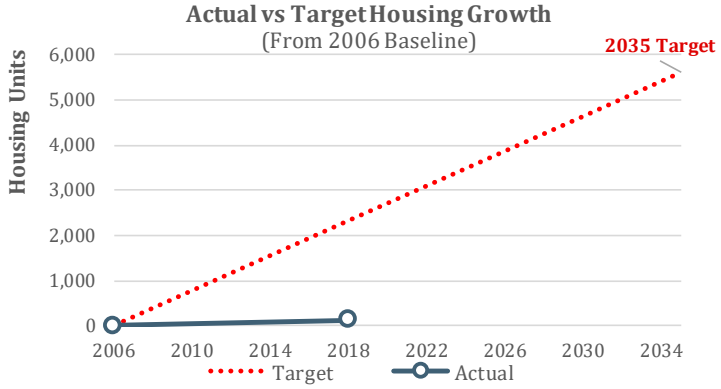
| Job Capacity by Land Use | Net Buildable Area (mil.sq.ft.) | Assumed Density Range (FAR) | Existing Floor Area (million sq.ft.) | Floor Area Capac. (million sq.ft.) | Sq. ft. per Job | Job Capacity |
|---|---|---|---|---|---|---|
| **Commercial** | | | | | | |
| Vacant | 0.04 | 0.60 | 0.00 | 0.02 | 600 | 37 |
| Redevelopable | 0.07 | 0.60 | 0.00 | 0.04 | 600 | 62 |
| **Commercial Total** | **0.11** | **0.60** | **0.00** | **0.06** | **600** | **99** |
| **Mixed-Use** | | | | | | |
| Vacant | 0.29 | 0.60 / 1.50 | 0.00 | 0.36 | 600 | 593 |
| Redevelopable | 2.59 | 0.60 / 1.50 | 1.01 | 2.62 | 600 | 4369 |
| **Mixed Use Total** | **2.88** | **0.60 / 1.50** | **1.01** | **2.98** | **600** | **4,962** |
| **Industrial** | | | | | | |
| Vacant | 4.17 | 0.35 / 1.50 | 0.00 | 2.19 | 800 / 1200 | 2,218 |
| Redevelopable | 2.43 | 0.35 / 1.50 | 0.40 | 1.38 | 800 / 1200 | 1547 |
| **Industrial Total** | **6.59** | **0.35 / 1.50** | **0.40** | **3.57** | **800 / 1200** | **3,765** |
| **City Total** | | | | | | |
| Commercial | 0.11 | 0.60 | 0.69 | 0.06 | 600 | 99 |
| Mixed Use | 2.88 | 0.60 / 1.50 | 0.91 | 2.98 | 600 | 4,962 |
| Industrial | 6.59 | 0.35 / 1.50 | 0.26 | 3.57 | 800 / 1200 | 3,765 |
| *Job Capacity in Pipeline* | | | | | | *6,739* |
| **City Total** | **9.58** | **0.35 / 1.50** | **1.86** | **6.61** | **600 / 1200** | **15,565** |

| Job Capacity by Assumed Density Level | # | % |
|---|---|---|
| Very Low Density | 0 | 0% |
| Low Density | 1,709 | 19% |
| Medium Low Density | 269 | 3% |
| Medium High Density | 6,848 | 78% |
| High Density | 0 | 0% |
| | | |
| *Capacity in Pipeline* | | *6,739* |
| **Total Capacity (jobs)** | | **15,565** |
| Remaining Target (2018-2035) | | 24,411 |
| **Surplus/Deficit Capacity (jobs)** | | **-8,846** |



# City of Tukwila

## Housing Growth and Residential Development Trends




| | |
|---|---|
| **Tukwila Housing Growth Target: 2006-2035** | **5,626** |
| 2006 Estimated Housing Units | 7,739 |
| 2018 Estimated Housing Units | 7,869 |
| **Estimated Housing Growth** | **130** |
| **Remaining 2035 Target** | **5,496** |

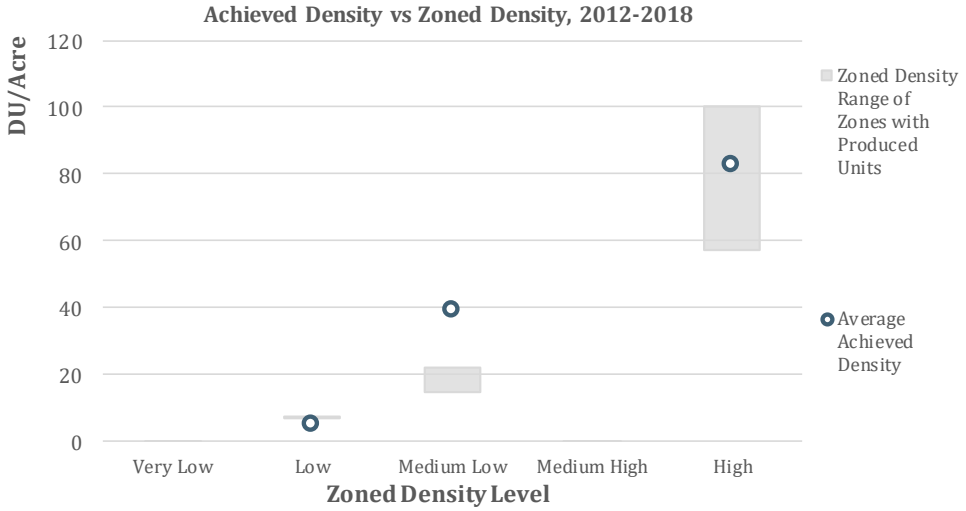
| % of Pace Needed to Achieve 2035 Housing Growth Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| **5.6%** | **0.14%** | **4.11%** |

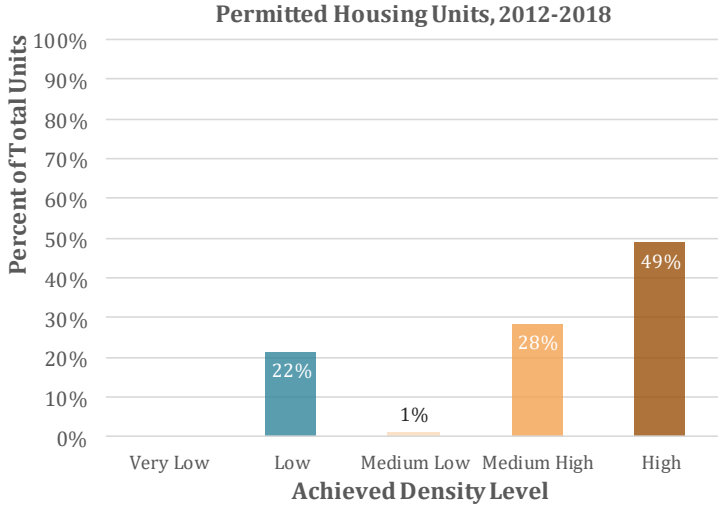
Since 2006, Tukwila has grown at 6% of the pace needed to achieve its 2035 housing growth target of 5,626 units. During this period, the total number of housing units in Tukwila grew by roughly 2%. At this current rate, Tukwila is under the production pace needed to meet its 2035 growth target, and needs to grow at an annual rate of 4.1% to reach its remaining target by 2035.

### Residential Achieved Densities

| Zoned Density (du/acre) | | Gross Area (acres) | Critical Areas (acres) | Public Purpose (acres) | ROWs (acres) | Net Area (acres) | Total Units | Achieved Density (DU/acre) |
|---|---|---|---|---|---|---|---|---|
| **Very Low** | 0 - 4 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| **Low** | 4 - 10 du/acre | 35.6 | 1.7 | 2.3 | 0.0 | 31.6 | 163 | **5.2** |
| **Medium Low** | 10 - 24 du/acre | 4.2 | 0.0 | 0.2 | 0.0 | 4.0 | 155 | **38.9** |
| **Medium High** | 24 - 48 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| **High** | 48 & up du/acre | 5.3 | 0.0 | 0.0 | 0.0 | 5.3 | 440 | **82.4** |
| | **Total** | **45.1** | **1.7** | **2.5** | **0.0** | **40.9** | **758** | **18.5** |

| Achieved Density Level | Net Area (acres) | Total Units |
|---|---|---|
| **Very Low** | 0.0 | 0 |
| **Low** | 31.6 | 163 |
| **Medium Low** | 0.6 | 9 |
| **Medium High** | 5.3 | 215 |
| **High** | 3.4 | 371 |
| **Total** | **40.9** | **758** |



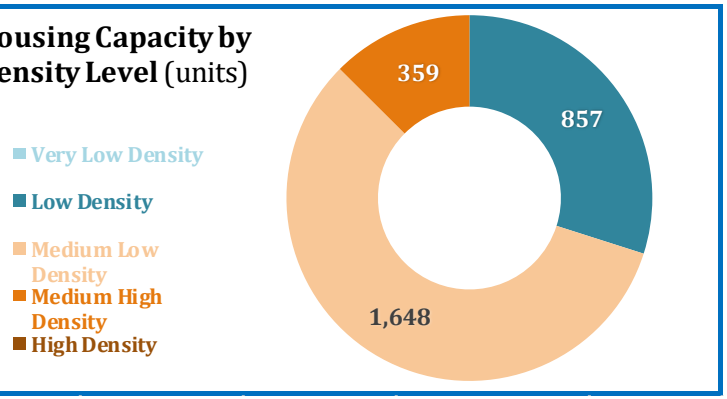



## Tukwila - Residential Land Supply and Capacity

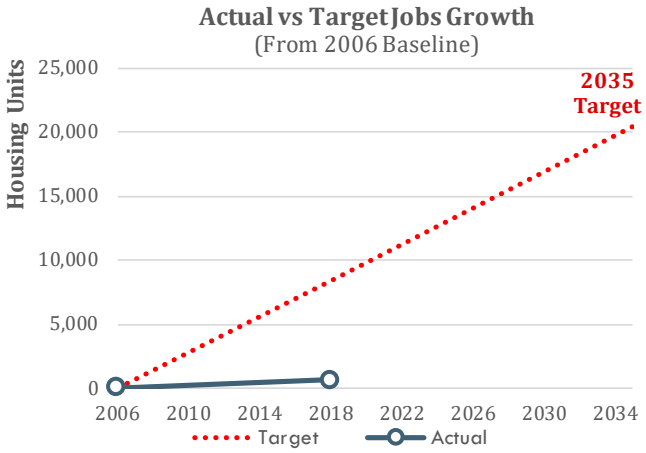
| Assumed Density Level | Vacant/ Redevelopable | Gross Acres | Critical Areas | Infrastructure Constrained Area | ROW & Public Purpose Discount | Market Factor (low/high) | Net Available Acres | Assumed Densities (low/high - units/acre) | Net Capacity (units) |
|---|---|---|---|---|---|---|---|---|---|
| Very Low Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | | **0** |
| Low Density | Vacant Subtotal | | | | 9.06 | 20.0% - 20.0% | 63.41 | 5.1 | 323 |
| | Redev Subtotal | | | | 31.52 | 20.0% - 20.0% | 220.65 | 5.1 | 533 |
| | **Subtotal** | 645.65 | 225.11 | 14.74 | 40.58 | | 284.06 | | **857** |
| Medium Low Density | Vacant Subtotal | | | | 7.65 | 10.0% - 20.0% | 44.69 | 14.5 / 22.0 | 938 |
| | Redev Subtotal | | | | 6.01 | 10.0% - 20.0% | 39.04 | 14.5 / 22.0 | 710 |
| | **Subtotal** | 171.21 | 95.68 | 0.00 | 13.65 | | 83.72 | | **1,648** |
| Medium High Density | Vacant Subtotal | | | | 0.43 | 10.0% - 10.0% | 2.79 | 35.8 | 100 |
| | Redev Subtotal | | | | 1.18 | 10.0% - 10.0% | 7.69 | 35.8 | 259 |
| | **Subtotal** | 13.56 | 0.12 | 0.00 | 1.61 | | 10.48 | | **359** |
| High Density | Vacant Subtotal | | | | 1.37 | 10.0% - 10.0% | 8.92 | 61.7 / 61.7 | 0 |
| | Redev Subtotal | | | | 13.82 | 10.0% - 10.0% | 89.84 | 61.7 / 61.7 | 0 |
| | **Subtotal** | 105.34 | 21.77 | 0.00 | 15.19 | | 98.76 | | **0** |
| All Zones | Vacant Total | | | | 18.51 | | 119.81 | | 1,361 |
| | Redev Total | | | | 52.53 | | 357.22 | | 1,502 |
| | **Total** | **935.76** | **342.68** | **14.74** | **71.04** | | **477.03** | | **2,863** |

| Capacity (units) | |
|---|---|
| Very Low Density Zones | 0 |
| Low Density Zones | 857 |
| Medium Low Density Zones | 1,648 |
| Medium High Density Zones | 359 |
| High Density Zones | 0 |
| *Capacity in Pipeline* | *2,642* |
| | |
| **Total Capacity (Units)** | **5,505** |
| Remaining Target (2018-2035) | 5,496 |
| **Surplus/Deficit Capacity (Units)** | **9** |

**Housing Capacity by Density Level** (units)



# Tukwila - Employment Growth and Commercial/Industrial Development Trends




| Tukwila Jobs Growth Target: 2006-2035 | 20,358 |
|---|---|
| 2006 Jobs (PSRC) | 44,345 |
| 2018 Jobs (PSRC) | 44,966 |
| **Total Jobs Growth** | **621** |
| Remaining 2035 Target | 19,737 |

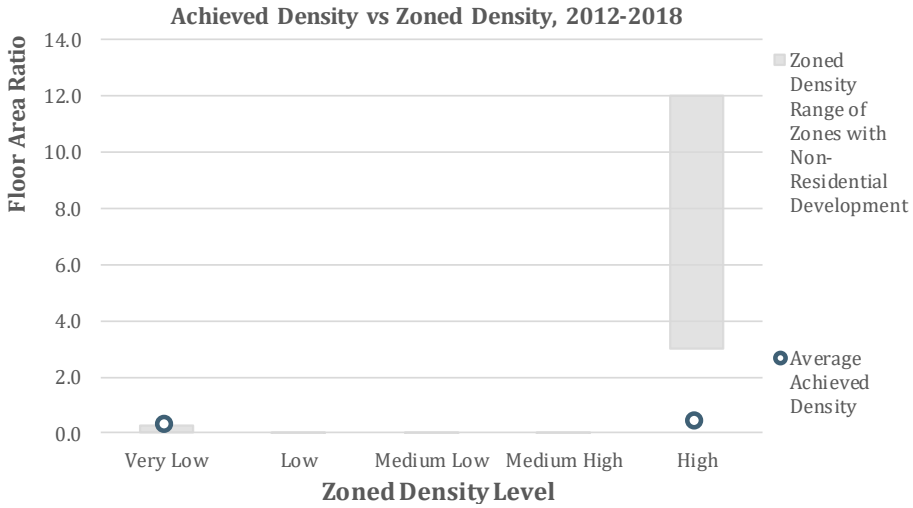
| % of Pace Needed to Achieve 2035 Jobs Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| 7.4% | 0.12% | 2.58% |

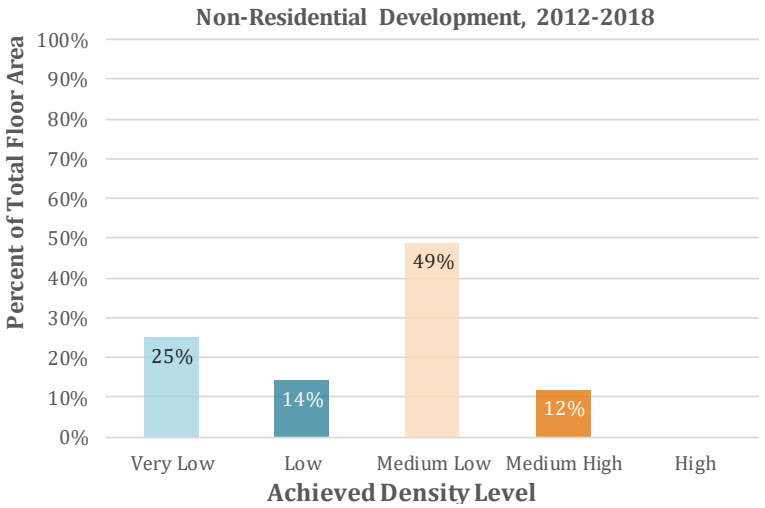
Since 2006, Tukwila has grown at 7% of the pace needed to achieve its 2035 jobs growth target of 20,358 units. During this period, the total number of jobs in Tukwila grew by roughly 1%. At this current rate, Tukwila is under the pace needed to meet its 2035 jobs growth target, and needs to grow at an annual rate of 2.6% to reach its remaining target by 2035.

## Non-Residential Achieved Densities

| Zoned Density (FAR) | | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|---|
| Very Low | 0 - 0.35 FAR | 328,799 | 96,529 | 0.3 |
| Low | 0.35 - 0.5 FAR | 0 | 0 | |
| Medium Low | 0.5 - 1.0 FAR | 0 | 0 | |
| Medium High | 1.0 - 3.0 FAR | 0 | 0 | |
| High | 3.0 & up FAR | 1,422,281 | 533,029 | 0.4 |
| | Total | 1,751,080 | 629,558 | 0.4 |

| Achieved Density Level | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|
| Very Low | 1,141,085 | 158,640 | 0.1 |
| Low | 219,547 | 90,252 | 0.4 |
| Medium Low | 348,948 | 307,035 | 0.9 |
| Medium High | 41,500 | 73,631 | 1.8 |
| High | 0 | 0 | 0.0 |
| Total | 1,751,080 | 629,558 | 0.4 |



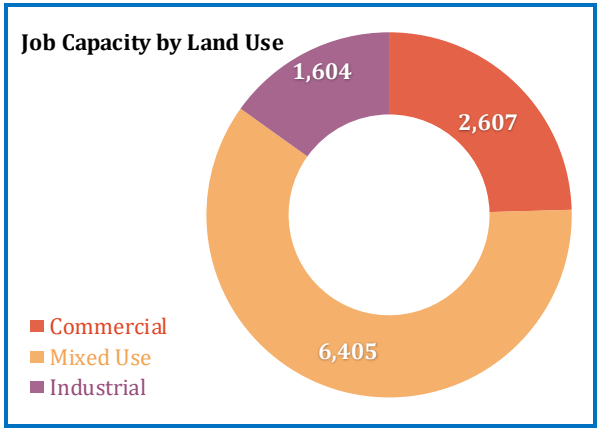
## Tukwila - Commercial/Industrial Land Supply and Job Capacity

| Land Supply | Gross Area (acres) | Critical Areas (acres) | ROWs (acres) | Public Purpose (acres) | Initial Land Supply | Market Factor | Buildable Area (acres) |
|---|---|---|---|---|---|---|---|
| **Vacant / Redev.** | | | | | | | |
| Commercial | 234.4 | 137.9 | 1.9 | 9.7 | 84.9 | 20% | 65.6 |
| Mixed Use | 392.2 | 41.6 | 7.0 | 35.1 | 308.5 | 10% - 20% | 256.3 |
| Industrial | 282.1 | 122.6 | 3.2 | 16.0 | 140.4 | 35% | 84.5 |
| **Non-Res Land Total** | **908.6** | **302.1** | **12.1** | **65.9** | **580.1** | | **406.5** |

| Job Capacity by Land Use | Net Buildable Area (mil.sq.ft.) | Assumed Density Range (FAR) | Existing Floor Area (million sq.ft.) | Floor Area Capac. (million sq.ft.) | Sq. ft. per Job | Job Capacity |
|---|---|---|---|---|---|---|
| **Commercial*** | | | | | | |
| Vacant | 0.45 | 0.07 / 0.75 | 0.00 | 0.19 | 400 / 800 | 275 |
| Redevelopable | 3.97 | 0.07 / 0.75 | 0.95 | 1.09 | 400 / 800 | 2332 |
| **Commercial Total** | **4.42** | **0.07 / 0.75** | **0.95** | **1.28** | **400 / 800** | **2,607** |
| **Mixed-Use** | | | | | | |
| Vacant | 5.48 | 0.06 / 0.93 | 0.00 | 1.21 | 400 | 3,020 |
| Redevelopable | 5.69 | 0.06 / 0.93 | 1.53 | 1.35 | 400 | 3385 |
| **Mixed Use Total** | **11.16** | **0.06 / 0.93** | **1.53** | **2.56** | **400** | **6,405** |
| **Industrial** | | | | | | |
| Vacant | 1.02 | 0.42 | 0.00 | 0.43 | 800 | 534 |
| Redevelopable | 2.67 | 0.42 | 0.26 | 0.86 | 800 | 1070 |
| **Industrial Total** | **3.68** | **0.42** | **0.26** | **1.28** | **800** | **1,604** |
| **City Total** | | | | | | |
| Commercial | 4.42 | 0.07 / 0.75 | 0.69 | 1.28 | 400 / 800 | 2,607 |
| Mixed Use | 11.16 | 0.06 / 0.93 | 0.91 | 2.56 | 400 | 6,405 |
| Industrial | 3.68 | 0.42 | 0.26 | 1.28 | 800 | 1,604 |
| *Job Capacity in Pipeline* | | | | | | *3,074* |
| **City Total** | **19.26** | **0.06 / 0.93** | **1.86** | **5.12** | **400 / 800** | **13,691** |

*Certain zones grouped as commercial allow for industrial use.

| Job Capacity by Assumed Density Level | # | % |
|---|---|---|
| Very Low Density | 2,467 | 23% |
| Low Density | 2,195 | 21% |
| Medium Low Density | 5,954 | 56% |
| Medium High Density | 0 | 0% |
| High Density | 0 | 0% |
| | | |
| *Capacity in Pipeline* | | *3,074* |
| **Total Capacity (jobs)** | | **13,691** |
| Remaining Target (2018-2035) | | 19,737 |
| **Surplus/Deficit Capacity (jobs)** | | **-6,046** |

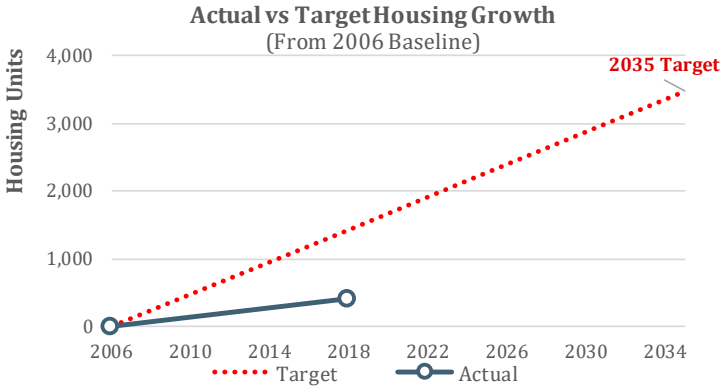


# High Capacity Transit Communities

City of Des Moines
City of Kenmore
City of Lake Forest Park
City of Mercer Island
City of Newcastle
City of Shoreline
City of Woodinville

# City of Des Moines

## Housing Growth and Residential Development Trends




| Des Moines Housing Growth Target: 2006-2035 | 3,480 |
|---|---|
| 2006 Estimated Housing Units | 12,287 |
| 2018 Estimated Housing Units | 12,700 |
| **Estimated Housing Growth** | **413** |
| **Remaining 2035 Target** | **3,067** |

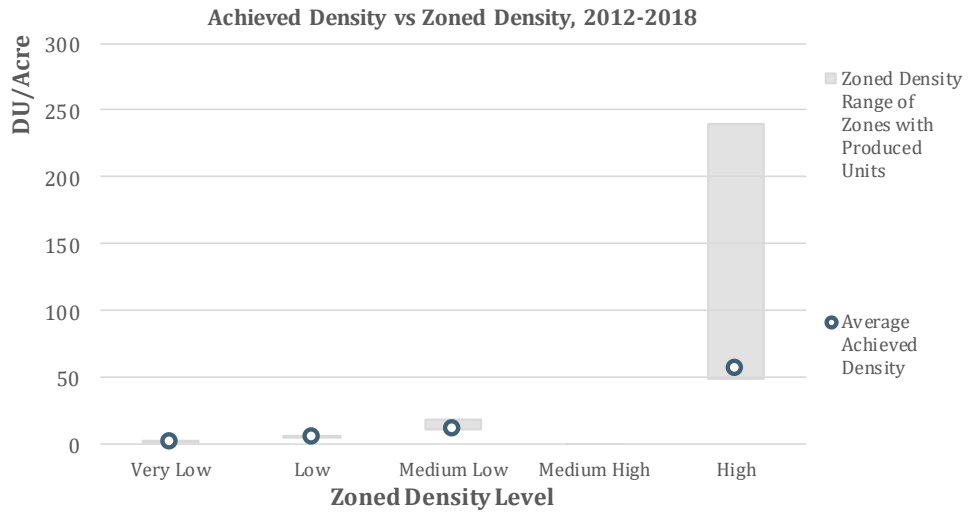
| % of Pace Needed to Achieve 2035 Housing Growth Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| **28.7%** | **0.28%** | **1.42%** |

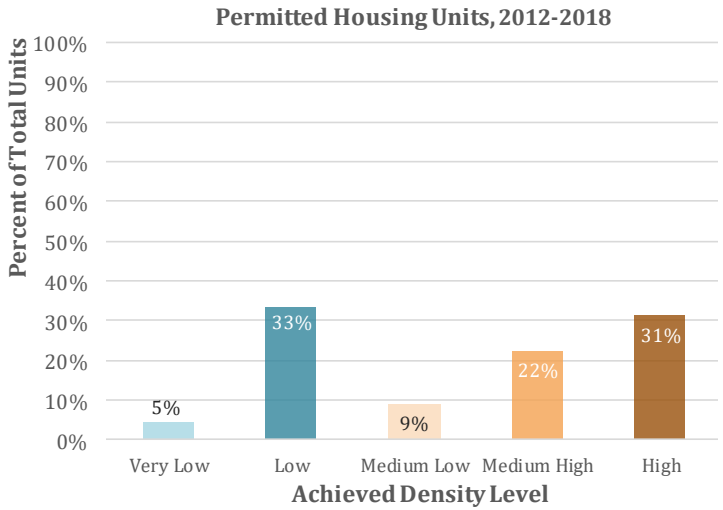
Since 2006, Des Moines has grown at 29% of the pace needed to achieve its 2035 housing growth target of 3,480 units. During this period, the total number of housing units in Des Moines grew by roughly 3%. At this current rate, Des Moines is under the production pace needed to meet its 2035 growth target, and needs to grow at an annual rate of 1.4% to reach its remaining target by 2035.

### Residential Achieved Densities

| Zoned Density (du/acre) | | Gross Area (acres) | Critical Areas (acres) | Public Purpose (acres) | ROWs (acres) | Net Area (acres) | Total Units | Achieved Density (DU/acre) |
|---|---|---|---|---|---|---|---|---|
| **Very Low** | 0 - 4 du/acre | 2.4 | 1.1 | 0.0 | 0.0 | 1.3 | 2 | **1.5** |
| **Low** | 4 - 10 du/acre | 36.0 | 0.9 | 3.9 | 0.2 | 31.0 | 138 | **4.4** |
| **Medium Low** | 10 - 24 du/acre | 4.3 | 0.3 | 0.0 | 0.1 | 3.9 | 44 | **11.2** |
| **Medium High** | 24 - 48 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| **High** | 48 & up du/acre | 3.7 | 0.0 | 0.0 | 0.0 | 3.7 | 209 | **56.5** |
| | **Total** | **46.4** | **2.3** | **3.9** | **0.2** | **40.0** | **393** | **9.8** |

| Achieved Density Level | Net Area (acres) | Total Units |
|---|---|---|
| **Very Low** | 5.9 | 18 |
| **Low** | 27.9 | 131 |
| **Medium Low** | 2.8 | 35 |
| **Medium High** | 2.4 | 87 |
| **High** | 0.9 | 122 |
| **Total** | **40.0** | **393** |



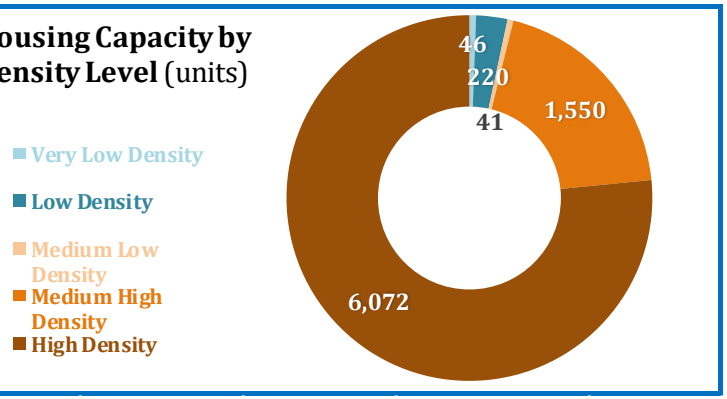



## Des Moines - Residential Land Supply and Capacity

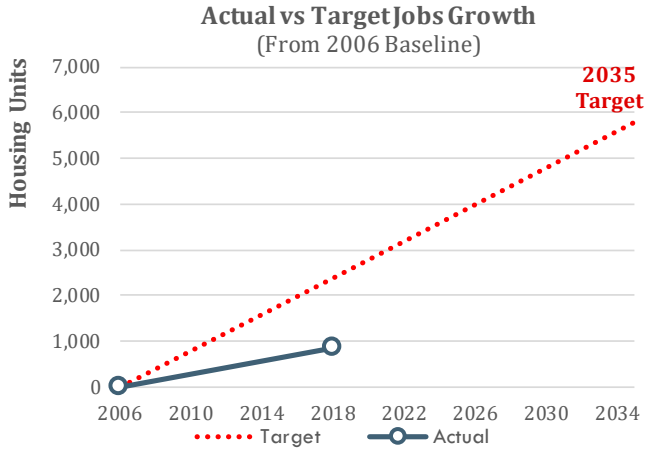
| Assumed Density Level | Vacant/ Redevelopable | Gross Acres | Critical Areas | Infrastructure Constrained Area | ROW & Public Purpose Discount | Market Factor (low/high) | Net Available Acres | Assumed Densities (low/high - units/acre) | Net Capacity (units) |
|---|---|---|---|---|---|---|---|---|---|
| Very Low Density | Vacant Subtotal | | | | 3.55 | 20.0% - 20.0% | 7.82 | 1.2 / 3.8 | 28 |
| | Redev Subtotal | | | | 6.33 | 20.0% - 20.0% | 13.93 | 1.2 / 3.8 | 19 |
| | **Subtotal** | 181.56 | 111.71 | 0.00 | 9.89 | | 21.75 | | **46** |
| Low Density | Vacant Subtotal | | | | 10.58 | 20.0% - 20.0% | 24.42 | 4.4 / 8.8 | 118 |
| | Redev Subtotal | | | | 23.13 | 20.0% - 20.0% | 53.44 | 4.4 / 8.8 | 101 |
| | **Subtotal** | 516.05 | 376.59 | 0.00 | 33.71 | | 77.86 | | **220** |
| Medium Low Density | Vacant Subtotal | | | | 0.07 | 20.0% - 20.0% | 0.31 | 12.4 | 4 |
| | Redev Subtotal | | | | 0.85 | 20.0% - 20.0% | 3.67 | 12.4 | 37 |
| | **Subtotal** | 10.42 | 4.30 | 0.00 | 0.92 | | 3.98 | | **41** |
| Medium High Density | Vacant Subtotal | | | | 2.90 | 14.0% - 30.0% | 13.45 | 24.2 / 36.3 | 488 |
| | Redev Subtotal | | | | 10.48 | 14.0% - 30.0% | 43.42 | 24.2 / 36.3 | 1,062 |
| | **Subtotal** | 98.44 | 9.27 | 0.00 | 13.38 | | 56.88 | | **1,550** |
| High Density | Vacant Subtotal | | | | 2.41 | 20.0% - 30.0% | 10.01 | 48.4 / 129.7 | 988 |
| | Redev Subtotal | | | | 12.71 | 20.0% - 30.0% | 51.89 | 48.4 / 129.7 | 5,084 |
| | **Subtotal** | 103.04 | 1.91 | 0.00 | 15.12 | | 61.91 | | **6,072** |
| All Zones | Vacant Total | | | | 19.51 | | 56.01 | | 1,626 |
| | Redev Total | | | | 53.50 | | 166.36 | | 6,304 |
| | **Total** | **909.51** | **503.78** | **0.00** | **73.01** | | **222.37** | | **7,930** |

| Capacity (units) | |
|---|---|
| Very Low Density Zones | 46 |
| Low Density Zones | 220 |
| Medium Low Density Zones | 41 |
| Medium High Density Zones | 1,550 |
| High Density Zones | 6,072 |
| *Capacity in Pipeline* | *456* |
| | |
| **Total Capacity (Units)** | **8,386** |
| Remaining Target (2018-2035) | 3,067 |
| **Surplus/Deficit Capacity (Units)** | **5,319** |

**Housing Capacity by Density Level** (units)



# Des Moines - Employment Growth and Commercial/Industrial Development Trends




| Des Moines Jobs Growth Target: 2006-2035 | 5,800 |
|---|---|
| 2006 Jobs (PSRC) | 6,206 |
| 2018 Jobs (PSRC) | 7,065 |
| **Total Jobs Growth** | **859** |
| **Remaining 2035 Target** | **4,941** |

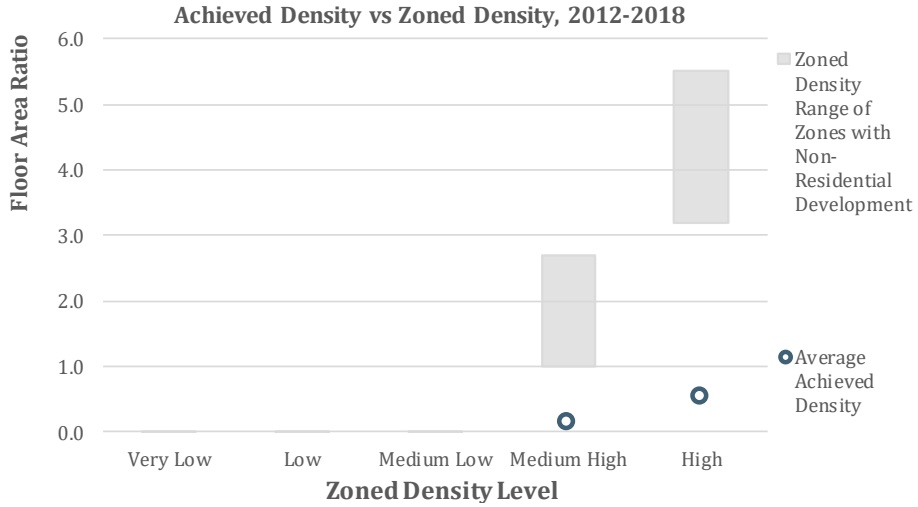
| % of Pace Needed to Achieve 2035 Jobs Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| **35.8%** | **1.15%** | **4.11%** |

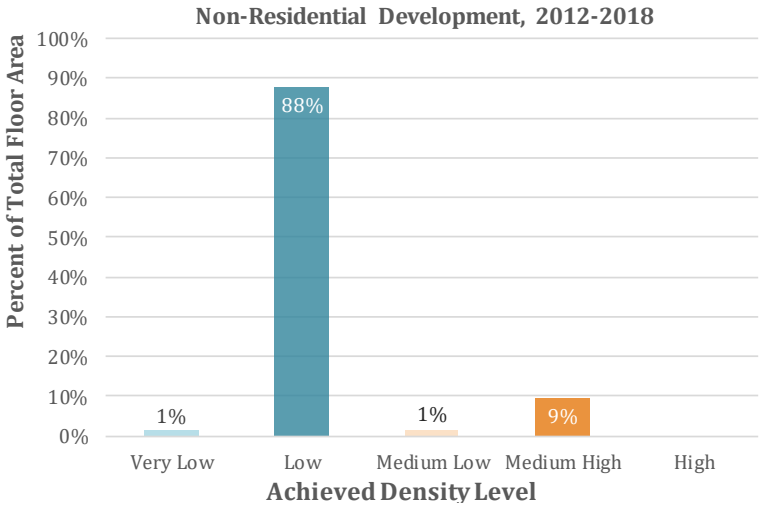
Since 2006, Des Moines has grown at 36% of the pace needed to achieve its 2035 jobs growth target of 5,800 units. During this period, the total number of jobs in Des Moines grew by roughly 14%. At this current rate, Des Moines is under the pace needed to meet its 2035 jobs growth target, and needs to grow at an annual rate of 4.1% to reach its remaining target by 2035.

## Non-Residential Achieved Densities

| Zoned Density (FAR) | | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|---|
| **Very Low** | 0 - 0.35 FAR | 0 | 0 | |
| **Low** | 0.35 - 0.5 FAR | 0 | 0 | |
| **Medium Low** | 0.5 - 1.0 FAR | 0 | 0 | |
| **Medium High** | 1.0 - 3.0 FAR | 40,980 | 6,203 | **0.2** |
| **High** | 3.0 & up FAR | 3,938,931 | 2,104,363 | **0.5** |
| | **Total** | **3,979,911** | **2,110,566** | **0.5** |

| Achieved Density Level | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|
| **Very Low** | 114,290 | 29,744 | **0.3** |
| **Low** | 3,724,382 | 1,853,398 | **0.5** |
| **Medium Low** | 47,100 | 29,583 | **0.6** |
| **Medium High** | 94,139 | 197,841 | **2.1** |
| **High** | 0 | 0 | **0.0** |
| **Total** | **3,979,911** | **2,110,566** | **0.5** |



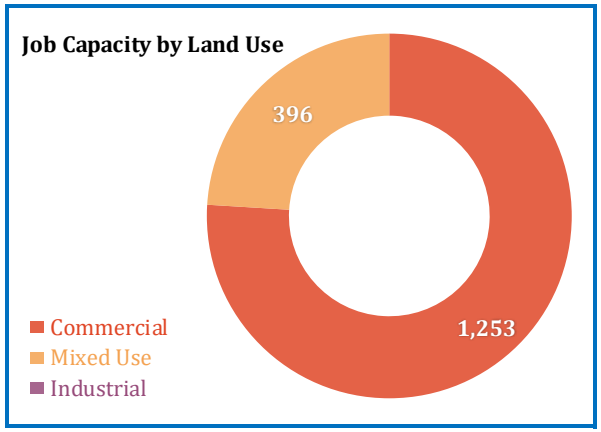



## Des Moines - Commercial/Industrial Land Supply and Job Capacity

| Land Supply | Gross Area (acres) | Critical Areas (acres) | ROWs (acres) | Public Purpose (acres) | Initial Land Supply | Market Factor | Buildable Area (acres) |
|---|---|---|---|---|---|---|---|
| **Vacant / Redev.** | | | | | | | |
| Commercial | 85.0 | 11.4 | 5.5 | 5.5 | 62.6 | 0% - 20% | 51.2 |
| Mixed Use | 178.8 | 6.2 | 12.9 | 12.9 | 146.7 | 15% - 30% | 106.6 |
| Industrial | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0% | 0.0 |
| **Non-Res Land Total** | **263.8** | **17.6** | **18.5** | **18.5** | **209.3** | | **157.8** |

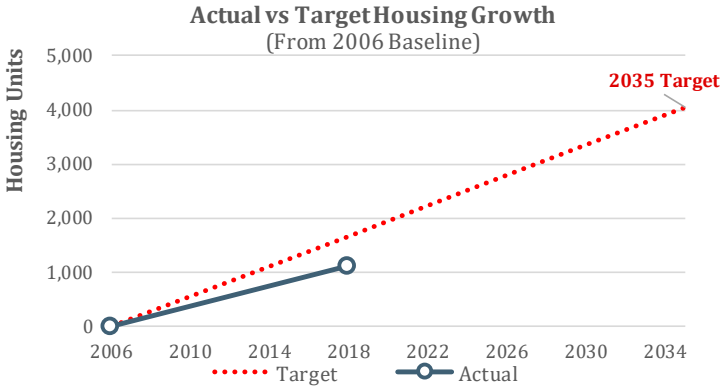
| Job Capacity by Land Use | Net Buildable Area (mil.sq.ft.) | Assumed Density Range (FAR) | Existing Floor Area (million sq.ft.) | Floor Area Capac. (million sq.ft.) | Sq. ft. per Job | Job Capacity |
|---|---|---|---|---|---|---|
| **Commercial** | | | | | | |
| Vacant | 0.96 | 0.32 / 3.50 | 0.00 | 0.42 | 0 / 800 | 727 |
| Redevelopable | 1.27 | 0.32 / 3.50 | 0.29 | 0.30 | 0 / 800 | 526 |
| **Commercial Total** | **2.23** | **0.32 / 3.50** | **0.29** | **0.72** | **0 / 800** | **1,253** |
| **Mixed-Use** | | | | | | |
| Vacant | 0.51 | 0.01 / 0.63 | 0.00 | 0.10 | 400 / 800 | 247 |
| Redevelopable | 4.13 | 0.01 / 0.63 | 1.51 | 0.06 | 400 / 800 | 149 |
| **Mixed Use Total** | **4.64** | **0.01 / 0.63** | **1.51** | **0.16** | **400 / 800** | **396** |
| **Industrial** | | | | | | |
| Vacant | 0.00 | 0.00 | 0.00 | 0.00 | 0 | 0 |
| Redevelopable | 0.00 | 0.00 | 0.00 | 0.00 | 0 | 0 |
| **Industrial Total** | **0.00** | **0.00** | **0.00** | **0.00** | **0** | **0** |
| **City Total** | | | | | | |
| Commercial | 2.23 | 0.32 / 3.50 | 0.69 | 0.72 | 0 / 800 | 1,253 |
| Mixed Use | 4.64 | 0.01 / 0.63 | 0.91 | 0.16 | 400 / 800 | 396 |
| Industrial | 0.00 | 0.00 | 0.26 | 0.00 | 0 | 0 |
| *Job Capacity in Pipeline* | | | | | | *0* |
| **City Total** | **6.87** | **3.50** | **1.86** | **0.88** | **0 / 800** | **1,649** |

| Job Capacity by Assumed Density Level | # | % |
|---|---|---|
| Very Low Density | 542 | 33% |
| Low Density | 0 | 0% |
| Medium Low Density | 823 | 50% |
| Medium High Density | 160 | 10% |
| High Density | 124 | 8% |
| | | |
| *Capacity in Pipeline* | | *0* |
| **Total Capacity (jobs)** | | **1,649** |
| Remaining Target (2018-2035) | | 4,941 |
| **Surplus/Deficit Capacity (jobs)** | | **-3,292** |



# City of Kenmore

## Housing Growth and Residential Development Trends




| Kenmore Housing Growth Target: 2006-2035 | 4,060 |
|---|---|
| 2006 Estimated Housing Units | 8,156 |
| 2018 Estimated Housing Units | 9,276 |
| **Estimated Housing Growth** | **1,120** |
| Remaining 2035 Target | 2,940 |

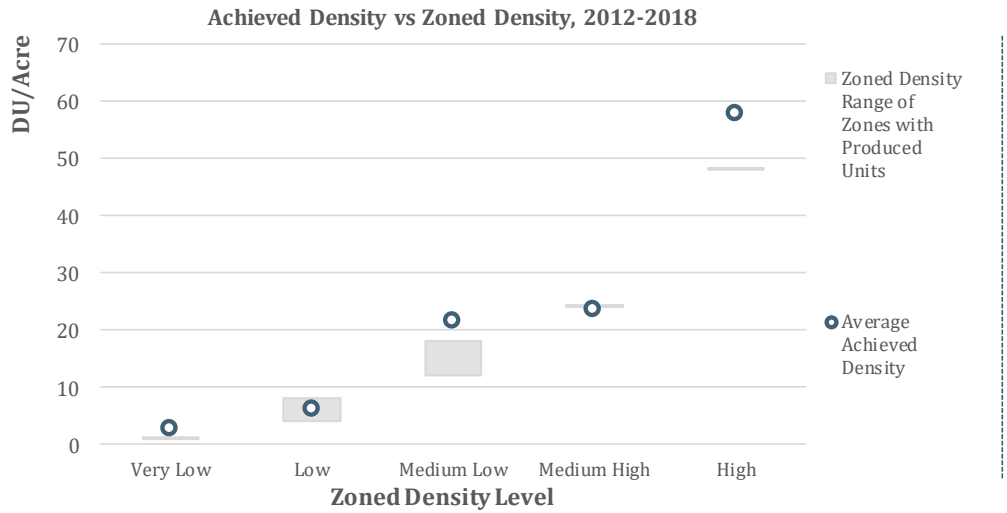
| % of Pace Needed to Achieve 2035 Housing Growth Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| 66.7% | 1.14% | 1.86% |

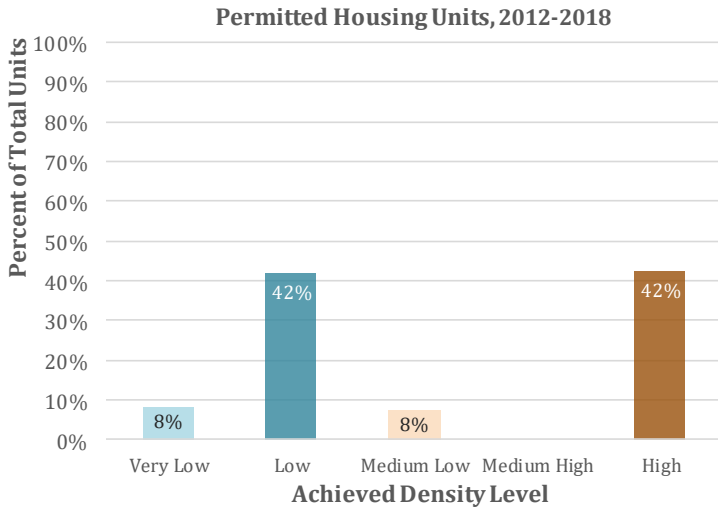
Since 2006, Kenmore has grown at 67% of the pace needed to achieve its 2035 housing growth target of 4,060 units. During this period, the total number of housing units in Kenmore grew by roughly 14%. At this current rate, Kenmore is under the production pace needed to meet its 2035 growth target, and needs to grow at an annual rate of 1.9% to reach its remaining target by 2035.

### Residential Achieved Densities

| Zoned Density (du/acre) | | Gross Area (acres) | Critical Areas (acres) | Public Purpose (acres) | ROWs (acres) | Net Area (acres) | Total Units | Achieved Density (DU/acre) |
|---|---|---|---|---|---|---|---|---|
| Very Low | 0 - 4 du/acre | 3.5 | 0.0 | 0.0 | 0.0 | 3.5 | 9 | **2.5** |
| Low | 4 - 10 du/acre | 65.3 | 2.8 | 0.3 | 0.5 | 61.7 | 365 | **5.9** |
| Medium Low | 10 - 24 du/acre | 5.6 | 4.2 | 0.1 | 0.0 | 1.4 | 29 | **21.4** |
| Medium High | 24 - 48 du/acre | 1.0 | 0.0 | 0.0 | 0.0 | 1.0 | 23 | **23.3** |
| High | 48 & up du/acre | 5.5 | 0.0 | 0.0 | 0.0 | 5.5 | 320 | **57.7** |
| | **Total** | **81.0** | **7.0** | **0.4** | **0.5** | **73.1** | **746** | **10.2** |

| Achieved Density Level | Net Area (acres) | Total Units |
|---|---|---|
| Very Low | 18.3 | 61 |
| Low | 46.9 | 313 |
| Medium Low | 2.6 | 56 |
| Medium High | 0.0 | 0 |
| High | 5.3 | 316 |
| **Total** | **73.1** | **746** |



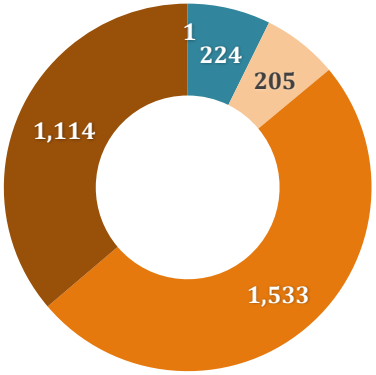



## Kenmore - Residential Land Supply and Capacity

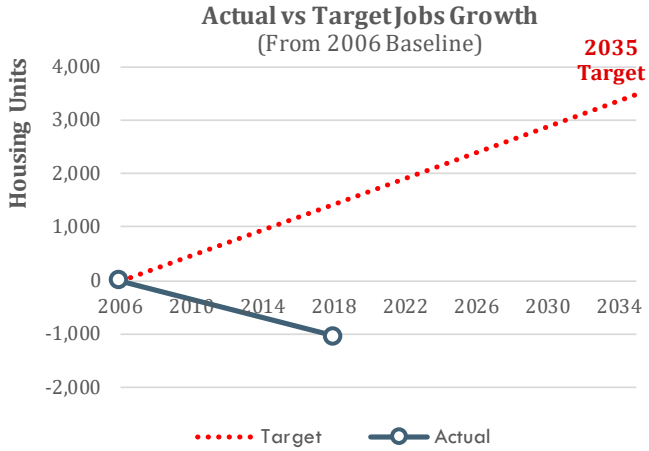
| Assumed Density Level | Vacant/ Redevelopable | Gross Acres | Critical Areas | Infrastructure Constrained Area | ROW & Public Purpose Discount | Market Factor (low/high) | Net Available Acres | Assumed Densities (low/high - units/acre) | Net Capacity (units) |
|---|---|---|---|---|---|---|---|---|---|
| Very Low Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 3.48 | 0.0% - 9.0% | 13.46 | 2.5 / 3.5 | 1 |
| | **Subtotal** | 151.92 | 114.06 | 0.00 | 3.48 | | 13.46 | | **1** |
| Low Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 21.56 | 5.0% - 5.0% | 60.36 | 6.7 / 8.0 | 224 |
| | **Subtotal** | 218.79 | 101.13 | 0.00 | 21.56 | | 60.36 | | **224** |
| Medium Low Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 2.13 | 5.0% - 5.0% | 11.36 | 16.4 / 23.3 | 205 |
| | **Subtotal** | 32.98 | 9.72 | 0.00 | 2.13 | | 11.36 | | **205** |
| Medium High Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 17.17 | 0.0% - 5.0% | 51.59 | 24.0 / 31.0 | 1,533 |
| | **Subtotal** | 2.88 | 0.00 | 0.00 | 17.17 | | 51.59 | | **1,533** |
| High Density | Vacant Subtotal | | | | 0.11 | 5.0% - 5.0% | 0.61 | 72.0 | 44 |
| | Redev Subtotal | | | | 3.80 | 5.0% - 10.0% | 20.19 | 48.0 / 72.0 | 1,071 |
| | **Subtotal** | 116.09 | 12.21 | 0.00 | 3.91 | | 20.79 | | **1,114** |
| All Zones | Vacant Total | | | | 0.11 | | 0.61 | | 44 |
| | Redev Total | | | | 48.13 | | 156.96 | | 3,033 |
| | **Total** | **522.66** | **237.12** | **0.00** | **48.24** | | **157.56** | | **3,077** |

| Capacity (units) | |
|---|---|
| Very Low Density Zones | 1 |
| Low Density Zones | 224 |
| Medium Low Density Zones | 205 |
| Medium High Density Zones | 1,533 |
| High Density Zones | 1,114 |
| *Capacity in Pipeline* | *484* |
| **Total Capacity (Units)** | **3,561** |
| Remaining Target (2018-2035) | 2,940 |
| **Surplus/Deficit Capacity (Units)** | **621** |

**Housing Capacity by Density Level** (units)



# Kenmore - Employment Growth and Commercial/Industrial Development Trends




| Kenmore Jobs Growth Target: 2006-2035 | 3,480 |
|---|---|
| 2006 Jobs (PSRC) | 5,062 |
| 2018 Jobs (PSRC) | 4,012 |
| **Total Jobs Growth** | **-1,050** |
| **Remaining 2035 Target** | **4,530** |

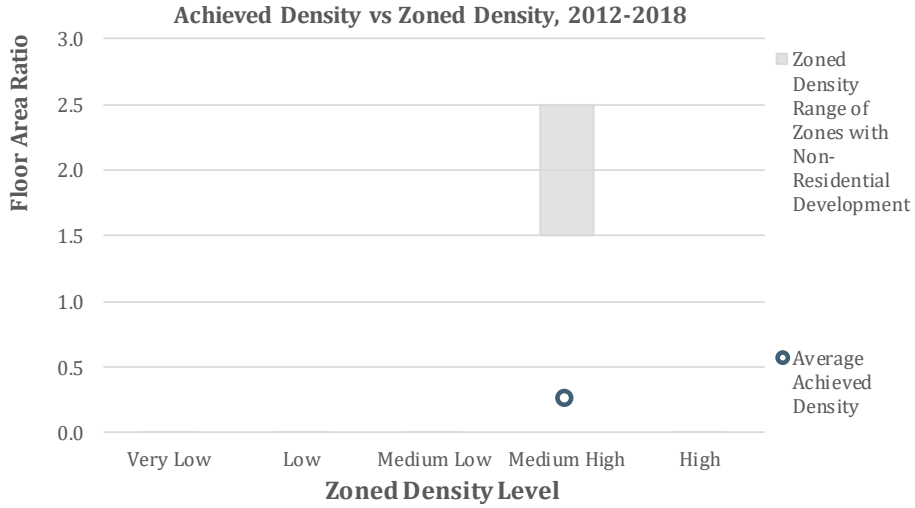
| % of Pace Needed to Achieve 2035 Jobs Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| **-72.9%** | **-1.73%** | **6.64%** |

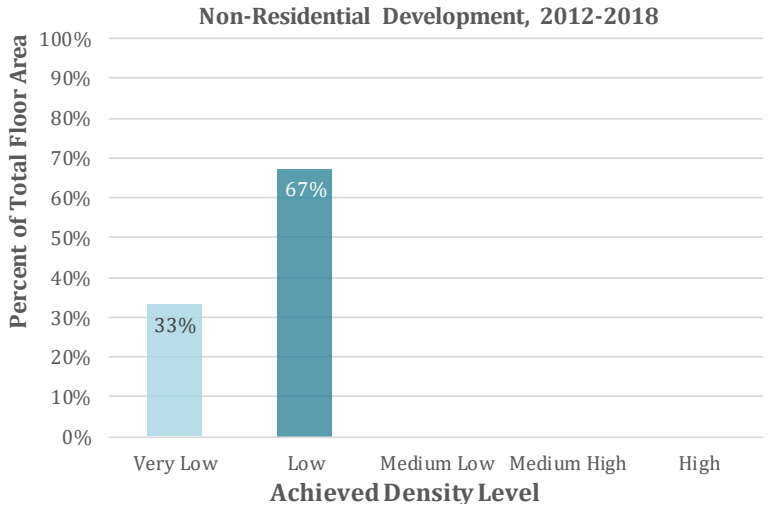
Since 2006, Kenmore has grown at -73% of the pace needed to achieve its 2035 jobs growth target of 3,480 units. During this period, the total number of jobs in Kenmore grew by roughly -21%. At this current rate, Kenmore is under the pace needed to meet its 2035 jobs growth target, and needs to grow at an annual rate of 6.6% to reach its remaining target by 2035.

## Non-Residential Achieved Densities

| Zoned Density (FAR) | | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|---|
| **Very Low** | 0 - 0.35 FAR | 0 | 0 | |
| **Low** | 0.35 - 0.5 FAR | 0 | 0 | |
| **Medium Low** | 0.5 - 1.0 FAR | 0 | 0 | |
| **Medium High** | 1.0 - 3.0 FAR | 239,623 | 61,187 | **0.3** |
| **High** | 3.0 & up FAR | 0 | 0 | |
| | **Total** | **239,623** | **61,187** | **0.3** |

| Achieved Density Level | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|
| **Very Low** | 134,034 | 20,211 | **0.2** |
| **Low** | 105,589 | 40,976 | **0.4** |
| **Medium Low** | 0 | 0 | **0.0** |
| **Medium High** | 0 | 0 | **0.0** |
| **High** | 0 | 0 | **0.0** |
| **Total** | **239,623** | **61,187** | **0.3** |



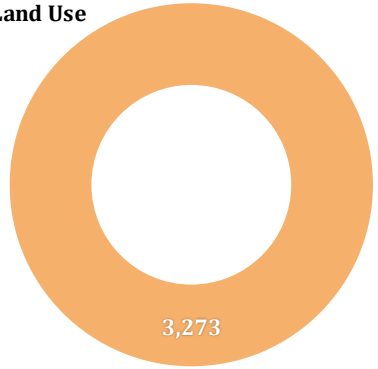
## Kenmore - Commercial/Industrial Land Supply and Job Capacity

| Land Supply | Gross Area (acres) | Critical Areas (acres) | ROWs (acres) | Public Purpose (acres) | Initial Land Supply | Market Factor | Buildable Area (acres) |
|---|---|---|---|---|---|---|---|
| **Vacant / Redev.** | | | | | | | |
| Commercial | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0% | 0.0 |
| Mixed Use | 131.4 | 17.4 | 8.0 | 16.0 | 90.1 | 0% - 10% | 87.5 |
| Industrial | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0% | 0.0 |
| **Non-Res Land Total** | **131.4** | **17.4** | **8.0** | **16.0** | **90.1** | | **87.5** |

| Job Capacity by Land Use | Net Buildable Area (mil.sq.ft.) | Assumed Density Range (FAR) | Existing Floor Area (million sq.ft.) | Floor Area Capac. (million sq.ft.) | Sq. ft. per Job | Job Capacity |
|---|---|---|---|---|---|---|
| **Commercial** | | | | | | |
| Vacant | 0.00 | 0.00 | 0.00 | 0.00 | 0 | 0 |
| Redevelopable | 0.00 | 0.00 | 0.00 | 0.00 | 0 | 0 |
| **Commercial Total** | **0.00** | **0.00** | **0.00** | **0.00** | **0** | **0** |
| **Mixed-Use** | | | | | | |
| Vacant | 0.03 | 0.39 | 0.00 | 0.01 | 300 | 34 |
| Redevelopable | 3.33 | 0.16 / 1.50 | 0.26 | 0.97 | 300 / 400 | 3239 |
| **Mixed Use Total** | **3.35** | **0.16 / 1.50** | **0.26** | **0.98** | **300 / 400** | **3,273** |
| **Industrial** | | | | | | |
| Vacant | 0.00 | 0.00 | 0.00 | 0.00 | 0 | 0 |
| Redevelopable | 0.00 | 0.00 | 0.00 | 0.00 | 0 | 0 |
| **Industrial Total** | **0.00** | **0.00** | **0.00** | **0.00** | **0** | **0** |
| **City Total** | | | | | | |
| Commercial | 0.00 | 0.00 | 0.69 | 0.00 | 0 | 0 |
| Mixed Use | 3.35 | 0.16 / 1.50 | 0.91 | 0.98 | 300 / 400 | 3,273 |
| Industrial | 0.00 | 0.00 | 0.26 | 0.00 | 0 | 0 |
| *Job Capacity in Pipeline* | | | | | | *19* |
| **City Total** | **3.35** | **1.50** | **1.86** | **0.98** | **0 / 400** | **3,292** |

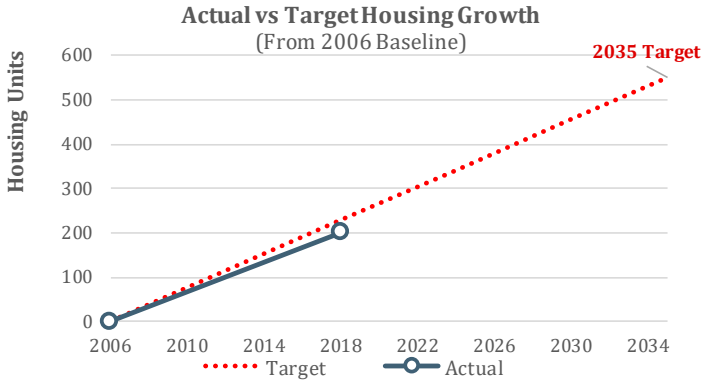
| Job Capacity by Assumed Density Level | # | % |
|---|---|---|
| Very Low Density | 295 | 8% |
| Low Density | 3,518 | 91% |
| Medium Low Density | 0 | 0% |
| Medium High Density | 49 | 1% |
| High Density | 0 | 0% |
| | | |
| *Capacity in Pipeline* | | *19* |
| **Total Capacity (jobs)** | | **3,881** |
| Remaining Target (2018-2035) | | 4,530 |
| **Surplus/Deficit Capacity (jobs)** | | **-649** |

**Job Capacity by Land Use**



# City of Lake Forest Park

## Housing Growth and Residential Development Trends




| Lake Forest Park Housing Growth Target: 2006-2035 | 551 |
|---|---|
| 2006 Estimated Housing Units | 5,226 |
| 2018 Estimated Housing Units | 5,427 |
| **Estimated Housing Growth** | **201** |
| **Remaining 2035 Target** | **350** |

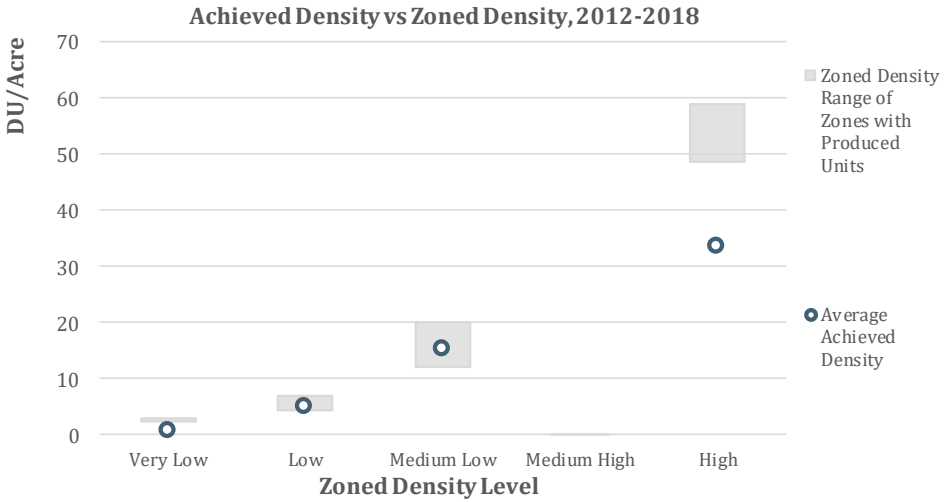
| % of Pace Needed to Achieve 2035 Housing Growth Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| 88.2% | 0.32% | 0.38% |

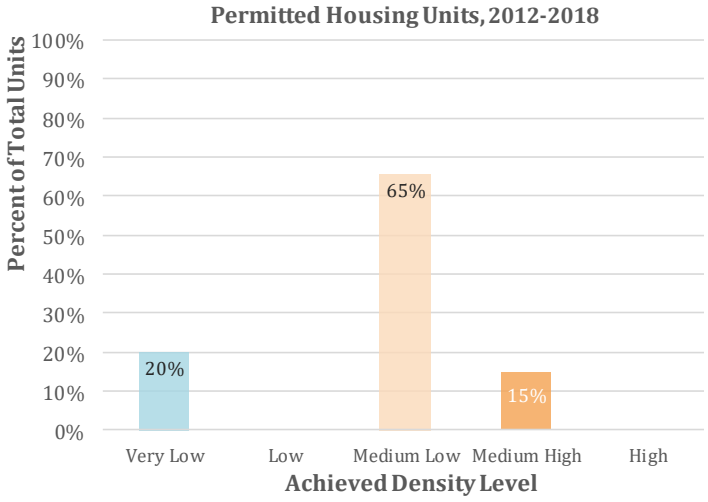
Since 2006, Lake Forest Park has grown at 88% of the pace needed to achieve its 2035 housing growth target of 551 units. During this period, the total number of housing units in Lake Forest Park grew by roughly 4%. At this current rate, Lake Forest Park is under the production pace needed to meet its 2035 growth target, and needs to grow at an annual rate of 0.4% to reach its remaining target by 2035.

### Residential Achieved Densities

| Zoned Density (du/acre) | | Gross Area (acres) | Critical Areas (acres) | Public Purpose (acres) | ROWs (acres) | Net Area (acres) | Total Units | Achieved Density (DU/acre) |
|---|---|---|---|---|---|---|---|---|
| **Very Low** | 0 - 4 du/acre | 3.5 | 0.0 | 0.0 | 0.0 | 3.5 | 2 | **0.6** |
| **Low** | 4 - 10 du/acre | 17.8 | 4.2 | 0.0 | 0.0 | 13.6 | 67 | **4.9** |
| **Medium Low** | 10 - 24 du/acre | 5.1 | 0.0 | 0.0 | 0.1 | 5.1 | 77 | **15.2** |
| **Medium High** | 24 - 48 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| **High** | 48 & up du/acre | 0.8 | 0.0 | 0.0 | 0.0 | 0.8 | 25 | **33.3** |
| | **Total** | **27.2** | **4.2** | **0.0** | **0.1** | **22.9** | **171** | **7.5** |

| Achieved Density Level | Net Area (acres) | Total Units |
|---|---|---|
| **Very Low** | 15.2 | 34 |
| **Low** | 0.0 | 0 |
| **Medium Low** | 6.9 | 112 |
| **Medium High** | 0.8 | 25 |
| **High** | 0.0 | 0 |
| **Total** | **22.9** | **171** |



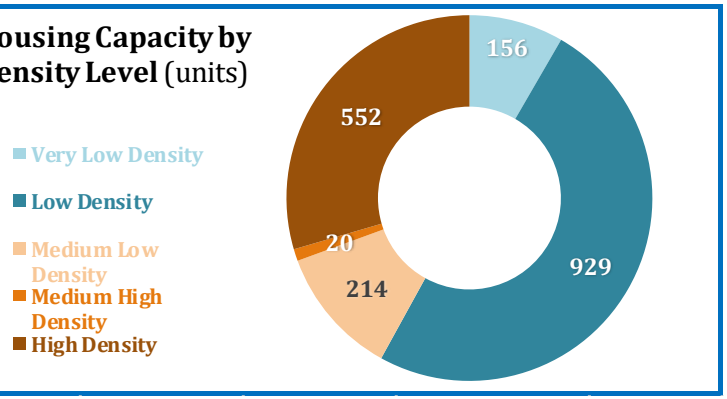



## Lake Forest Park - Residential Land Supply and Capacity

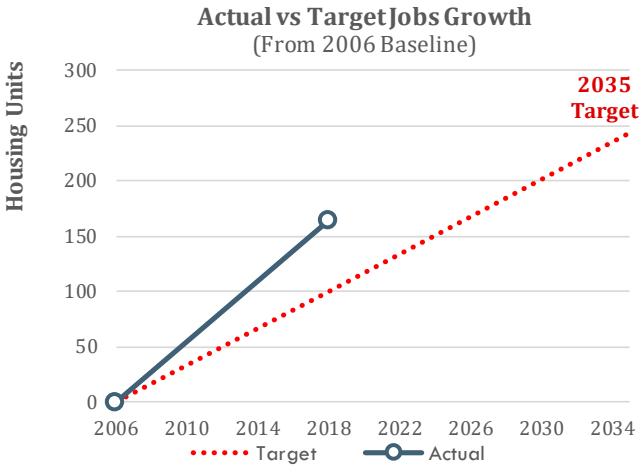
| Assumed Density Level | Vacant/ Redevelopable | Gross Acres | Critical Areas | Infrastructure Constrained Area | ROW & Public Purpose Discount | Market Factor (low/high) | Net Available Acres | Assumed Densities (low/high - units/acre) | Net Capacity (units) |
|---|---|---|---|---|---|---|---|---|---|
| Very Low Density | Vacant Subtotal | | | | 1.66 | 20.0% - 20.0% | 24.94 | 2.0 / 3.0 | 56 |
| | Redev Subtotal | | | | 6.32 | 20.0% - 20.0% | 94.73 | 2.0 / 3.0 | 100 |
| | **Subtotal** | 207.12 | 47.27 | 0.29 | 7.98 | | 119.66 | | **156** |
| Low Density | Vacant Subtotal | | | | 2.40 | 20.0% - 20.0% | 35.93 | 4.4 / 6.0 | 192 |
| | Redev Subtotal | | | | 14.79 | 20.0% - 20.0% | 221.85 | 4.4 / 6.0 | 737 |
| | **Subtotal** | 373.29 | 27.13 | 2.45 | 17.19 | | 257.78 | | **929** |
| Medium Low Density | Vacant Subtotal | | | | 0.00 | 16.0% - 20.0% | 0.00 | 12.0 / 18.2 | 0 |
| | Redev Subtotal | | | | 0.89 | 16.0% - 20.0% | 14.08 | 12.0 / 18.2 | 214 |
| | **Subtotal** | 19.51 | 1.67 | 0.00 | 0.89 | | 14.08 | | **214** |
| Medium High Density | Vacant Subtotal | | | | 0.00 | 16.0% - 16.0% | 0.00 | 24.2 / 33.3 | 0 |
| | Redev Subtotal | | | | 0.05 | 16.0% - 16.0% | 0.71 | 24.2 / 33.3 | 20 |
| | **Subtotal** | 0.94 | 0.06 | 0.00 | 0.05 | | 0.71 | | **20** |
| High Density | Vacant Subtotal | | | | 0.00 | 16.0% - 16.0% | 0.00 | 65.0 | 0 |
| | Redev Subtotal | | | | 0.56 | 16.0% - 16.0% | 8.85 | 65.0 | 552 |
| | **Subtotal** | 11.17 | 0.00 | 0.00 | 0.56 | | 8.85 | | **552** |
| All Zones | Vacant Total | | | | 4.06 | | 60.87 | | 247 |
| | Redev Total | | | | 22.60 | | 340.22 | | 1,623 |
| | **Total** | **612.01** | **76.14** | **2.74** | **26.66** | | **401.09** | | **1,870** |

| Capacity (units) | |
|---|---|
| Very Low Density Zones | 156 |
| Low Density Zones | 929 |
| Medium Low Density Zones | 214 |
| Medium High Density Zones | 20 |
| High Density Zones | 552 |
| *Capacity in Pipeline* | *0* |
| | |
| **Total Capacity (Units)** | **1,870** |
| Remaining Target (2018-2035) | 350 |
| **Surplus/Deficit Capacity (Units)** | **1,520** |

**Housing Capacity by Density Level** (units)



# Lake Forest Park - Employment Growth and Commercial/Industrial Development Trends




| Lake Forest Park Jobs Growth Target: 2006-2035 | 244 |
|---|---|
| 2006 Jobs (PSRC) | 1,612 |
| 2018 Jobs (PSRC) | 1,777 |
| **Total Jobs Growth** | **165** |
| **Remaining 2035 Target** | **79** |

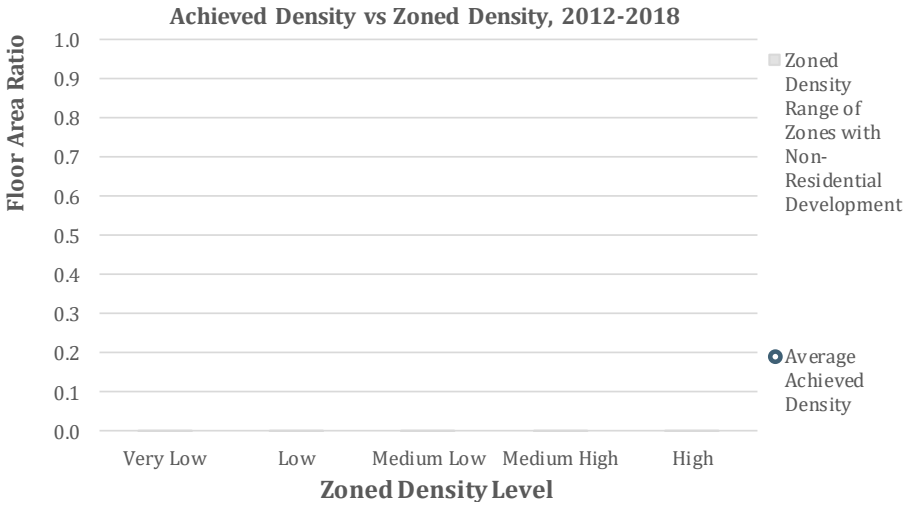
| % of Pace Needed to Achieve 2035 Jobs Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| **163.7%** | **0.85%** | **0.26%** |

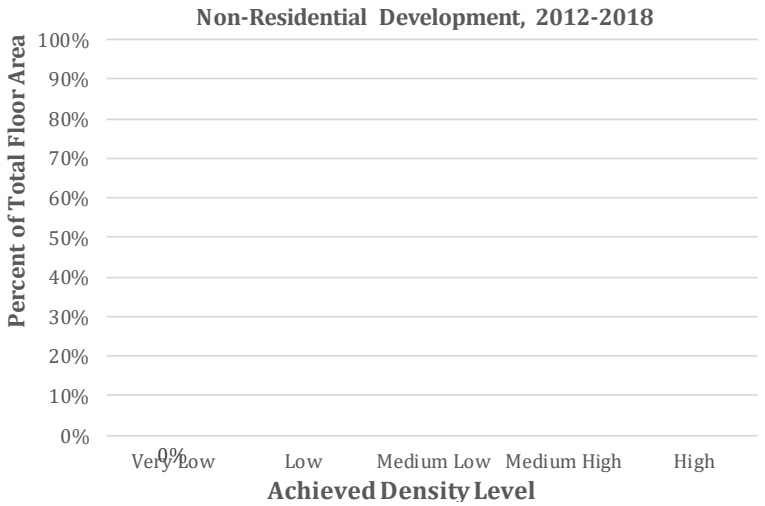
Since 2006, Lake Forest Park has grown at 164% of the pace needed to achieve its 2035 jobs growth target of 244 units. During this period, the total number of jobs in Lake Forest Park grew by roughly 10%. At this current rate, Lake Forest Park is over the pace needed to meet its 2035 jobs growth target, and needs to grow at an annual rate of 0.3% to reach its remaining target by 2035.

## Non-Residential Achieved Densities

| Zoned Density (FAR) | | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|---|
| **Very Low** | 0 - 0.35 FAR | 0 | 0 | |
| **Low** | 0.35 - 0.5 FAR | 0 | 0 | |
| **Medium Low** | 0.5 - 1.0 FAR | 0 | 0 | |
| **Medium High** | 1.0 - 3.0 FAR | 0 | 0 | |
| **High** | 3.0 & up FAR | 0 | 0 | |
| | **Total** | **0** | **0** | |

| Achieved Density Level | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|
| **Very Low** | 0 | 0 | **0.0** |
| **Low** | 0 | 0 | **0.0** |
| **Medium Low** | 0 | 0 | **0.0** |
| **Medium High** | 0 | 0 | **0.0** |
| **High** | 0 | 0 | **0.0** |
| **Total** | **0** | **0** | **0.0** |



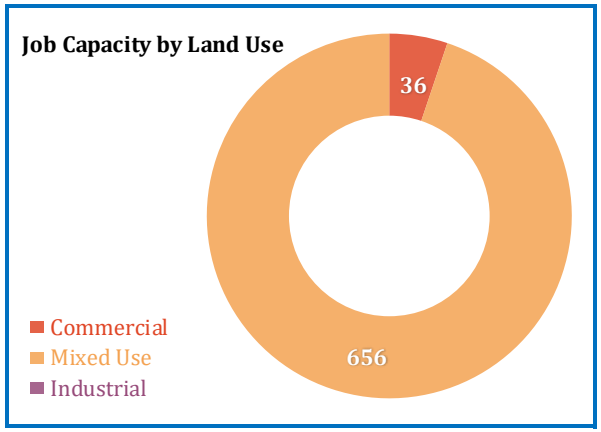



## Lake Forest Park - Commercial/Industrial Land Supply and Job Capacity

| Land Supply | Gross Area (acres) | Critical Areas (acres) | ROWs (acres) | Public Purpose (acres) | Initial Land Supply | Market Factor | Buildable Area (acres) |
|---|---|---|---|---|---|---|---|
| **Vacant / Redev.** | | | | | | | |
| Commercial | 3.4 | 0.2 | 0.1 | 0.0 | 3.0 | 26% - 50% | 1.6 |
| Mixed Use | 31.1 | 1.7 | 1.2 | 0.3 | 28.0 | 16% | 23.3 |
| Industrial | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0% | 0.0 |
| **Non-Res Land Total** | **34.5** | **1.9** | **1.3** | **0.3** | **31.0** | | **24.9** |

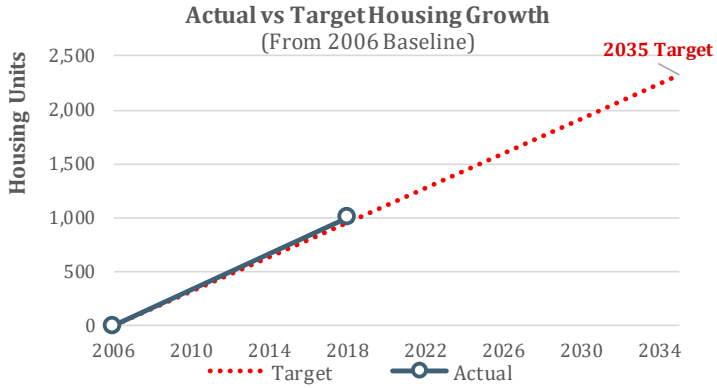
| Job Capacity by Land Use | Net Buildable Area (mil.sq.ft.) | Assumed Density Range (FAR) | Existing Floor Area (million sq.ft.) | Floor Area Capac. (million sq.ft.) | Sq. ft. per Job | Job Capacity |
|---|---|---|---|---|---|---|
| **Commercial** | | | | | | |
| Vacant | 0.00 | 0.50 | 0.00 | 0.00 | 465 | 0 |
| Redevelopable | 0.07 | 0.50 | 0.02 | 0.02 | 465 | 36 |
| **Commercial Total** | **0.07** | **0.50** | **0.02** | **0.02** | **465** | **36** |
| **Mixed-Use** | | | | | | |
| Vacant | 0.00 | 0.65 | 0.00 | 0.00 | 465 | 0 |
| Redevelopable | 1.01 | 0.65 | 0.29 | 0.30 | 465 | 656 |
| **Mixed Use Total** | **1.01** | **0.65** | **0.29** | **0.30** | **465** | **656** |
| **Industrial** | | | | | | |
| Vacant | 0.00 | 0.00 | 0.00 | 0.00 | 0 | 0 |
| Redevelopable | 0.00 | 0.00 | 0.00 | 0.00 | 0 | 0 |
| **Industrial Total** | **0.00** | **0.00** | **0.00** | **0.00** | **0** | **0** |
| **City Total** | | | | | | |
| Commercial | 0.07 | 0.50 | 0.69 | 0.02 | 465 | 36 |
| Mixed Use | 1.01 | 0.65 | 0.91 | 0.30 | 465 | 656 |
| Industrial | 0.00 | 0.00 | 0.26 | 0.00 | 0 | 0 |
| *Job Capacity in Pipeline* | | | | | | *0* |
| **City Total** | **1.08** | **0.65** | **1.86** | **0.32** | **0 / 465** | **691** |

| Job Capacity by Assumed Density Level | # | % |
|---|---|---|
| Very Low Density | 0 | 0% |
| Low Density | 0 | 0% |
| Medium Low Density | 691 | 100% |
| Medium High Density | 0 | 0% |
| High Density | 0 | 0% |
| | | |
| *Capacity in Pipeline* | | *0* |
| **Total Capacity (jobs)** | | **691** |
| Remaining Target (2018-2035) | | 79 |
| **Surplus/Deficit Capacity (jobs)** | | **613** |



# City of Mercer Island

## Housing Growth and Residential Development Trends




| Mercer Island Housing Growth Target: 2006-2035 | 2,320 |
|---|---|
| 2006 Estimated Housing Units | 9,467 |
| 2018 Estimated Housing Units | 10,473 |
| **Estimated Housing Growth** | **1,006** |
| **Remaining 2035 Target** | **1,314** |

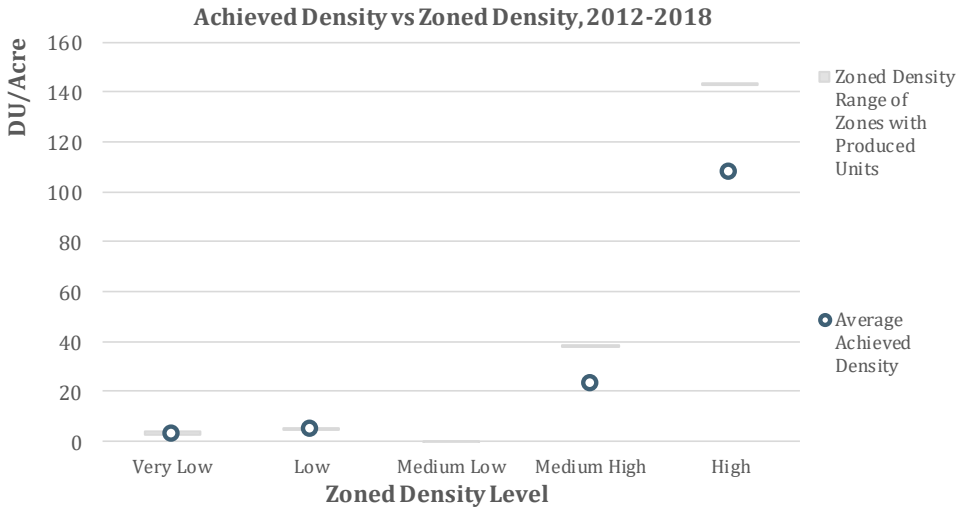
| % of Pace Needed to Achieve 2035 Housing Growth Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| 104.8% | 0.89% | 0.74% |

Since 2006, Mercer Island has grown at 105% of the pace needed to achieve its 2035 housing growth target of 2,320 units. During this period, the total number of housing units in Mercer Island grew by roughly 11%. At this current rate, Mercer Island is over the production pace needed to meet its 2035 growth target, and needs to grow at an annual rate of 0.7% to reach its remaining target by 2035.

### Residential Achieved Densities

| Zoned Density (du/acre) | | Gross Area (acres) | Critical Areas (acres) | Public Purpose (acres) | ROWs (acres) | Net Area (acres) | Total Units | Achieved Density (DU/acre) |
|---|---|---|---|---|---|---|---|---|
| **Very Low** | 0 - 4 du/acre | 12.2 | 2.2 | 1.7 | 0.0 | 8.3 | 22 | **2.7** |
| **Low** | 4 - 10 du/acre | 16.0 | 0.7 | 2.4 | 0.0 | 13.0 | 60 | **4.6** |
| **Medium Low** | 10 - 24 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| **Medium High** | 24 - 48 du/acre | 1.0 | 0.0 | 0.2 | 0.0 | 0.8 | 19 | **22.7** |
| **High** | 48 & up du/acre | 4.7 | 0.2 | 0.2 | 0.0 | 4.3 | 460 | **107.5** |
| | **Total** | **33.8** | **3.1** | **4.4** | **0.0** | **26.4** | **561** | **21.3** |

| Achieved Density Level | Net Area (acres) | Total Units |
|---|---|---|
| **Very Low** | 8.3 | 22 |
| **Low** | 13.0 | 60 |
| **Medium Low** | 0.8 | 19 |
| **Medium High** | 0.0 | 0 |
| **High** | 4.3 | 460 |
| **Total** | **26.4** | **561** |

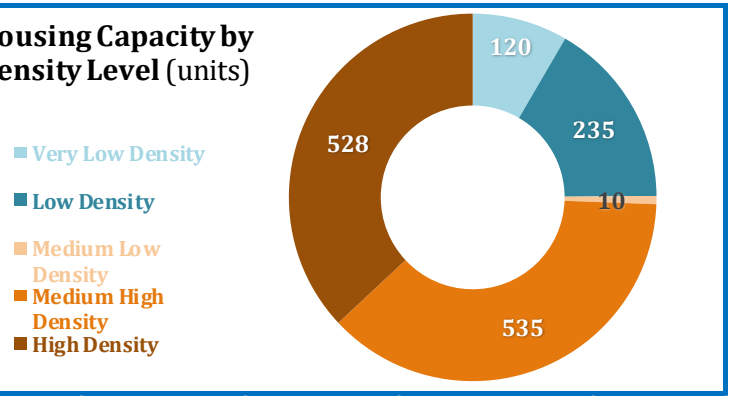


## Mercer Island - Residential Land Supply and Capacity

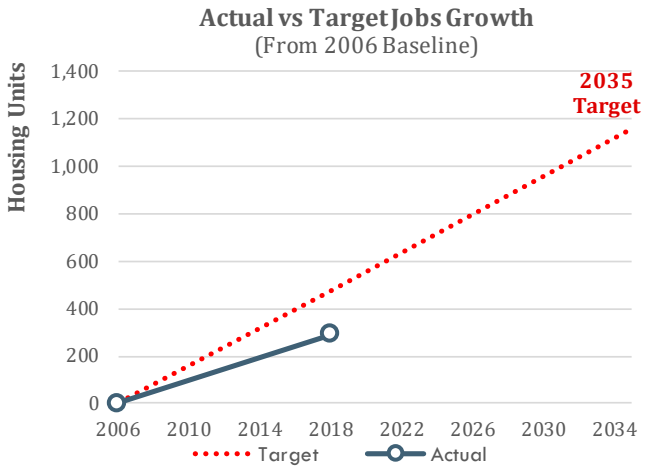
| Assumed Density Level | Vacant/ Redevelopable | Gross Acres | Critical Areas | Infrastructure Constrained Area | ROW & Public Purpose Discount | Market Factor (low/high) | Net Available Acres | Assumed Densities (low/high - units/acre) | Net Capacity (units) |
|---|---|---|---|---|---|---|---|---|---|
| Very Low Density | Vacant Subtotal | | | | 4.96 | 3.0% - 3.0% | 32.05 | 2.6 / 3.3 | 85 |
| | Redev Subtotal | | | | 13.31 | 3.0% - 3.0% | 85.97 | 2.6 / 3.3 | 35 |
| | **Subtotal** | 352.32 | 211.82 | 0.00 | 18.27 | | 118.02 | | **120** |
| Low Density | Vacant Subtotal | | | | 3.27 | 3.0% - 5.0% | 21.12 | 4.6 / 6.1 | 98 |
| | Redev Subtotal | | | | 16.64 | 3.0% - 5.0% | 107.54 | 4.6 / 6.1 | 138 |
| | **Subtotal** | 287.75 | 134.59 | 0.00 | 19.91 | | 128.65 | | **235** |
| Medium Low Density | Vacant Subtotal | | | | 0.02 | 20.0% - 20.0% | 0.45 | 22.7 | 10 |
| | Redev Subtotal | | | | 0.05 | 20.0% - 20.0% | 1.13 | 22.7 | 0 |
| | **Subtotal** | 3.12 | 1.05 | 0.00 | 0.07 | | 1.58 | | **10** |
| Medium High Density | Vacant Subtotal | | | | 0.00 | 20.0% - 20.0% | 0.00 | 26.0 | 0 |
| | Redev Subtotal | | | | 2.00 | 20.0% - 20.0% | 43.70 | 26.0 | 535 |
| | **Subtotal** | 62.65 | 5.52 | 0.00 | 2.00 | | 43.70 | | **535** |
| High Density | Vacant Subtotal | | | | 0.02 | 10.0% - 10.0% | 0.54 | 100.6 / 167.8 | 91 |
| | Redev Subtotal | | | | 0.95 | 10.0% - 10.0% | 23.47 | 100.6 / 167.8 | 437 |
| | **Subtotal** | 29.86 | 2.10 | 0.00 | 0.97 | | 24.01 | | **528** |
| All Zones | Vacant Total | | | | 8.27 | | 54.16 | | 284 |
| | Redev Total | | | | 32.95 | | 261.81 | | 1,145 |
| | **Total** | **735.70** | **355.08** | **0.00** | **41.22** | | **315.97** | | **1,429** |

| Capacity (units) | |
|---|---|
| Very Low Density Zones | 120 |
| Low Density Zones | 235 |
| Medium Low Density Zones | 10 |
| Medium High Density Zones | 535 |
| High Density Zones | 528 |
| *Capacity in Pipeline* | *178* |
| **Total Capacity (Units)** | **1,607** |
| Remaining Target (2018-2035) | 1,314 |
| **Surplus/Deficit Capacity (Units)** | **293** |

**Housing Capacity by Density Level** (units)



# Mercer Island - Employment Growth and Commercial/Industrial Development Trends




| Mercer Island Jobs Growth Target: 2006-2035 | 1,160 |
|---|---|
| 2006 Jobs (PSRC) | 7,453 |
| 2018 Jobs (PSRC) | 7,745 |
| **Total Jobs Growth** | **292** |
| **Remaining 2035 Target** | **868** |

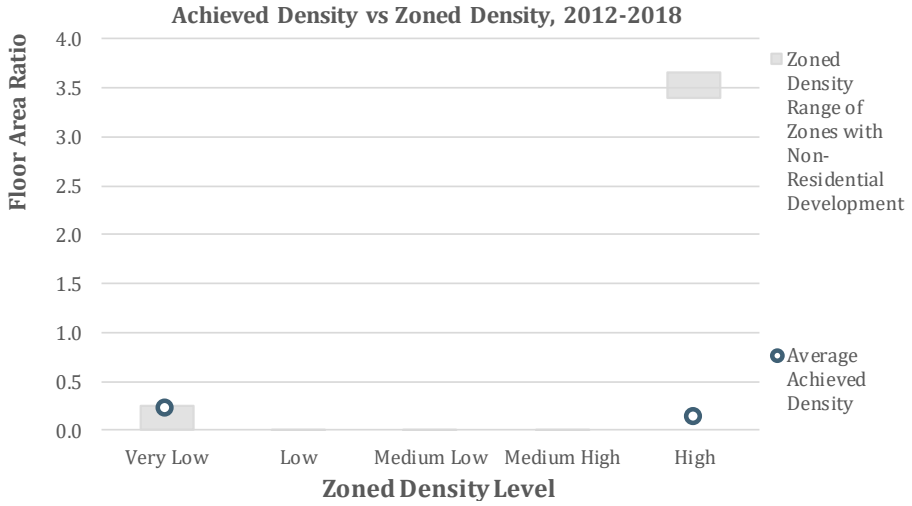
| % of Pace Needed to Achieve 2035 Jobs Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| **60.8%** | **0.33%** | **0.66%** |

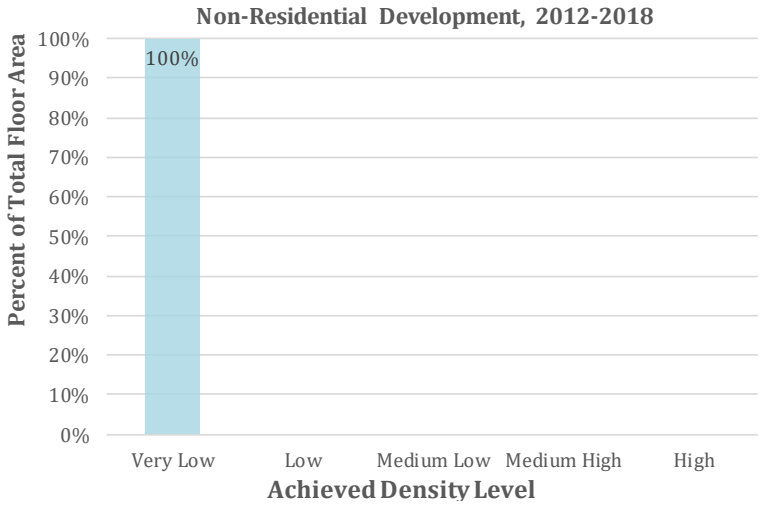
Since 2006, Mercer Island has grown at 61% of the pace needed to achieve its 2035 jobs growth target of 1,160 units. During this period, the total number of jobs in Mercer Island grew by roughly 4%. At this current rate, Mercer Island is under the pace needed to meet its 2035 jobs growth target, and needs to grow at an annual rate of 0.7% to reach its remaining target by 2035.

## Non-Residential Achieved Densities

| Zoned Density (FAR) | | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|---|
| **Very Low** | 0 - 0.35 FAR | 364,525 | 77,277 | **0.2** |
| **Low** | 0.35 - 0.5 FAR | 0 | 0 | |
| **Medium Low** | 0.5 - 1.0 FAR | 0 | 0 | |
| **Medium High** | 1.0 - 3.0 FAR | 0 | 0 | |
| **High** | 3.0 & up FAR | 195,824 | 24,137 | **0.1** |
| | **Total** | **560,349** | **101,414** | **0.2** |

| Achieved Density Level | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|
| **Very Low** | 560,349 | 101,414 | **0.2** |
| **Low** | 0 | 0 | **0.0** |
| **Medium Low** | 0 | 0 | **0.0** |
| **Medium High** | 0 | 0 | **0.0** |
| **High** | 0 | 0 | **0.0** |
| **Total** | **560,349** | **101,414** | **0.2** |



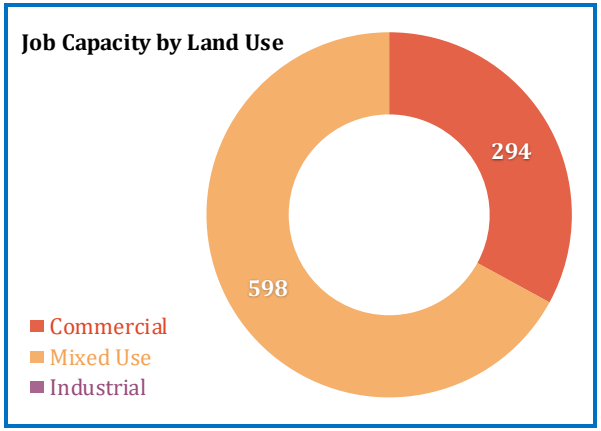



## Mercer Island - Commercial/Industrial Land Supply and Job Capacity

| Land Supply | Gross Area (acres) | Critical Areas (acres) | ROWs (acres) | Public Purpose (acres) | Initial Land Supply | Market Factor | Buildable Area (acres) |
|---|---|---|---|---|---|---|---|
| **Vacant / Redev.** | | | | | | | |
| Commercial | 25.0 | 15.6 | 0.0 | 0.3 | 9.0 | 15% - 20% | 7.2 |
| Mixed Use | 29.9 | 2.1 | 0.0 | 1.0 | 26.8 | 10% | 24.0 |
| Industrial | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0% | 0.0 |
| **Non-Res Land Total** | **54.8** | **17.7** | **0.0** | **1.3** | **35.8** | | **31.2** |

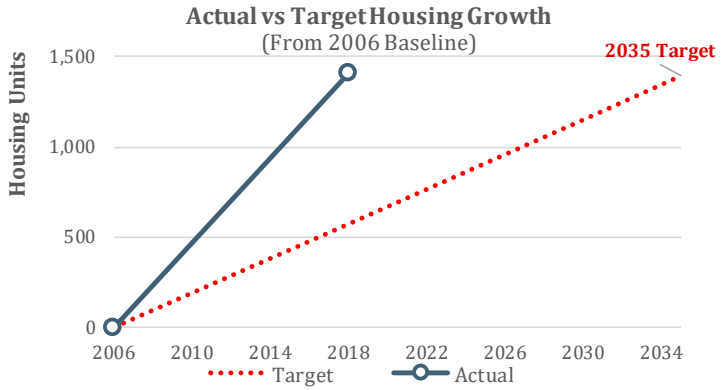
| Job Capacity by Land Use | Net Buildable Area (mil.sq.ft.) | Assumed Density Range (FAR) | Existing Floor Area (million sq.ft.) | Floor Area Capac. (million sq.ft.) | Sq. ft. per Job | Job Capacity |
|---|---|---|---|---|---|---|
| **Commercial** | | | | | | |
| Vacant | 0.03 | 0.22 / 0.50 | 0.00 | 0.01 | 200 | 52 |
| Redevelopable | 0.29 | 0.22 / 0.50 | 0.06 | 0.05 | 200 | 242 |
| **Commercial Total** | **0.31** | **0.22 / 0.50** | **0.06** | **0.06** | **200** | **294** |
| **Mixed-Use** | | | | | | |
| Vacant | 0.02 | 0.06 / 1.00 | 0.00 | 0.02 | 200 | 119 |
| Redevelopable | 1.02 | 0.06 / 1.00 | 0.48 | 0.10 | 200 | 479 |
| **Mixed Use Total** | **1.05** | **0.06 / 1.00** | **0.48** | **0.12** | **200** | **598** |
| **Industrial** | | | | | | |
| Vacant | 0.00 | 0.00 | 0.00 | 0.00 | 0 | 0 |
| Redevelopable | 0.00 | 0.00 | 0.00 | 0.00 | 0 | 0 |
| **Industrial Total** | **0.00** | **0.00** | **0.00** | **0.00** | **0** | **0** |
| **City Total** | | | | | | |
| Commercial | 0.31 | 0.22 / 0.50 | 0.69 | 0.06 | 200 | 294 |
| Mixed Use | 1.05 | 0.06 / 1.00 | 0.91 | 0.12 | 200 | 598 |
| Industrial | 0.00 | 0.00 | 0.26 | 0.00 | 0 | 0 |
| *Job Capacity in Pipeline* | | | | | | *70* |
| **City Total** | **1.36** | **1.00** | **1.86** | **0.18** | **0 / 200** | **961** |

| Job Capacity by Assumed Density Level | # | % |
|---|---|---|
| Very Low Density | 11 | 1% |
| Low Density | 177 | 20% |
| Medium Low Density | 227 | 25% |
| Medium High Density | 477 | 54% |
| High Density | 0 | 0% |
| | | |
| *Capacity in Pipeline* | | *70* |
| **Total Capacity (jobs)** | | **961** |
| Remaining Target (2018-2035) | | 868 |
| **Surplus/Deficit Capacity (jobs)** | | **93** |



# City of Newcastle

## Housing Growth and Residential Development Trends




| Newcastle Housing Growth Target: 2006-2035 | 1,392 |
|---|---|
| 2006 Estimated Housing Units | 3,784 |
| 2018 Estimated Housing Units | 5,188 |
| **Estimated Housing Growth** | **1,404** |
| Remaining 2035 Target | 0 |

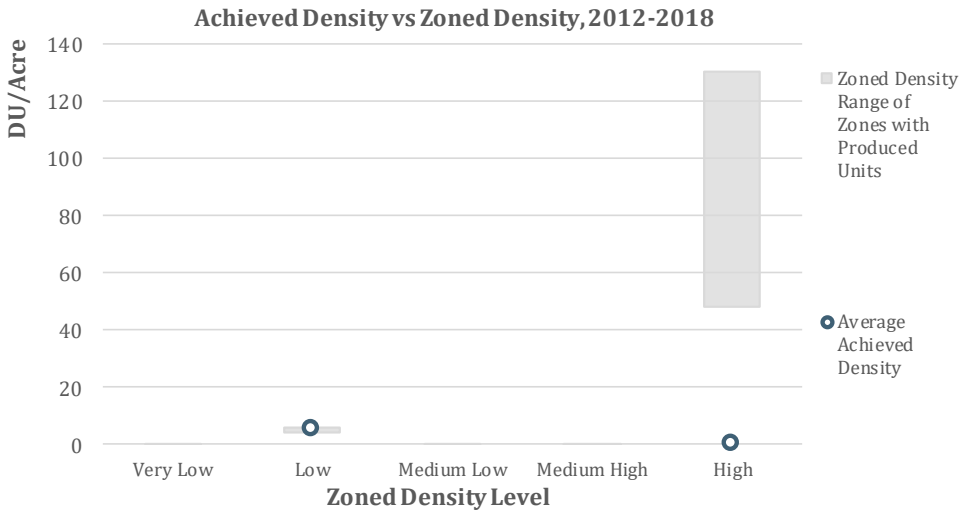
| % of Pace Needed to Achieve 2035 Housing Growth Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| 243.8% | 3.09% | Met Target |

Since 2006, Newcastle has grown at 244% of the pace needed to achieve its 2035 housing growth target of 1,392 units. During this period, the total number of housing units in Newcastle grew by roughly 37%. Newcastle has achieved its 2035 housing growth target.

### Residential Achieved Densities

| Zoned Density (du/acre) | | Gross Area (acres) | Critical Areas (acres) | Public Purpose (acres) | ROWs (acres) | Net Area (acres) | Total Units | Achieved Density (DU/acre) |
|---|---|---|---|---|---|---|---|---|
| Very Low | 0 - 4 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| Low | 4 - 10 du/acre | 77.0 | 18.7 | 11.5 | 4.2 | 42.6 | 223 | **5.2** |
| Medium Low | 10 - 24 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| Medium High | 24 - 48 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| High | 48 & up du/acre | 57.9 | 13.6 | 1.0 | 5.4 | 37.9 | 10 | **0.3** |
| | **Total** | **135.0** | **32.3** | **12.6** | **9.6** | **80.5** | **233** | **2.9** |

| Achieved Density Level | Net Area (acres) | Total Units |
|---|---|---|
| Very Low | 37.9 | 10 |
| Low | 42.6 | 223 |
| Medium Low | 0.0 | 0 |
| Medium High | 0.0 | 0 |
| High | 0.0 | 0 |
| **Total** | **80.5** | **233** |

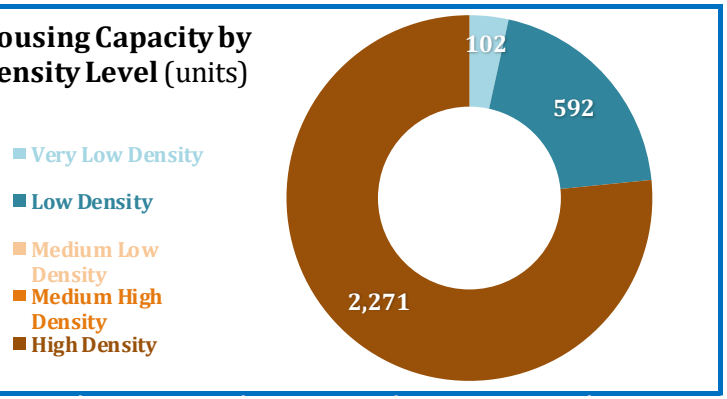


## Newcastle - Residential Land Supply and Capacity

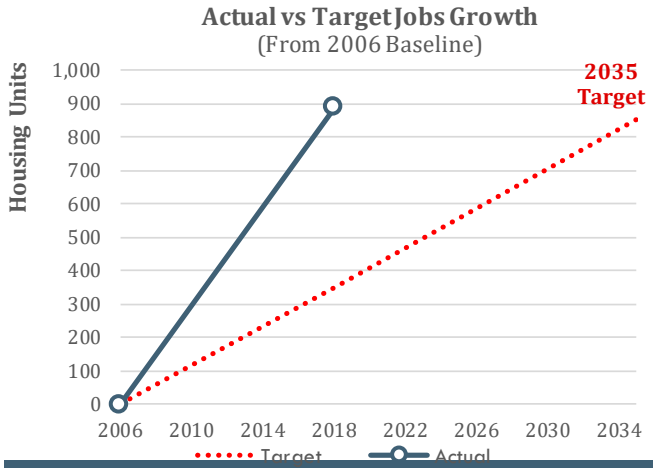
| Assumed Density Level | Vacant/ Redevelopable | Gross Acres | Critical Areas | Infrastructure Constrained Area | ROW & Public Purpose Discount | Market Factor (low/high) | Net Available Acres | Assumed Densities (low/high - units/acre) | Net Capacity (units) |
|---|---|---|---|---|---|---|---|---|---|
| Very Low Density | Vacant Subtotal | | | | 31.01 | 10.0% - 10.0% | 70.49 | 1.0 | 70 |
| | Redev Subtotal | | | | 19.23 | 10.0% - 10.0% | 43.69 | 1.0 | 32 |
| | **Subtotal** | 218.80 | 0.61 | 35.50 | 50.24 | | 114.18 | | **102** |
| Low Density | Vacant Subtotal | | | | 31.46 | 12.0% - 12.0% | 69.22 | 4.0 / 6.0 | 298 |
| | Redev Subtotal | | | | 38.73 | 12.0% - 12.0% | 85.21 | 4.0 / 6.0 | 294 |
| | **Subtotal** | 266.80 | 11.55 | 0.00 | 70.20 | | 154.43 | | **592** |
| Medium Low Density | Vacant Subtotal | | | | 0.00 | 10.0% - 10.0% | 0.00 | 12.0 | 0 |
| | Redev Subtotal | | | | 0.00 | 10.0% - 10.0% | 0.00 | 12.0 | 0 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | | **0** |
| Medium High Density | Vacant Subtotal | | | | 0.00 | 10.0% - 10.0% | 0.00 | 24.0 | 0 |
| | Redev Subtotal | | | | 0.00 | 10.0% - 10.0% | 0.00 | 24.0 | 0 |
| | **Subtotal** | 0.71 | 0.71 | 0.00 | 0.00 | | 0.00 | | **0** |
| High Density | Vacant Subtotal | | | | 0.00 | 10.0% - 10.0% | 0.00 | 48.0 / 60.0 | 0 |
| | Redev Subtotal | | | | 5.86 | 10.0% - 10.0% | 46.89 | 48.0 / 60.0 | 2,271 |
| | **Subtotal** | 58.61 | 0.00 | 0.00 | 5.86 | | 46.89 | | **2,271** |
| All Zones | Vacant Total | | | | 62.48 | | 139.71 | | 369 |
| | Redev Total | | | | 63.82 | | 175.79 | | 2,597 |
| | **Total** | **544.92** | **12.87** | **35.50** | **126.30** | | **315.50** | | **2,966** |

| Capacity (units) | |
|---|---|
| Very Low Density Zones | 102 |
| Low Density Zones | 592 |
| Medium Low Density Zones | 0 |
| Medium High Density Zones | 0 |
| High Density Zones | 2,271 |
| *Capacity in Pipeline* | *268* |
| | |
| **Total Capacity (Units)** | **3,234** |
| Remaining Target (2018-2035) | 0 |
| **Surplus/Deficit Capacity (Units)** | **3,234** |

**Housing Capacity by Density Level** (units)



# Newcastle - Employment Growth and Commercial/Industrial Development Trends




| Newcastle Jobs Growth Target: 2006-2035 | 853 |
|---|---|
| 2006 Jobs (PSRC) | 1,736 |
| 2018 Jobs (PSRC) | 2,627 |
| **Total Jobs Growth** | **891** |
| Remaining 2035 Target | 0 |

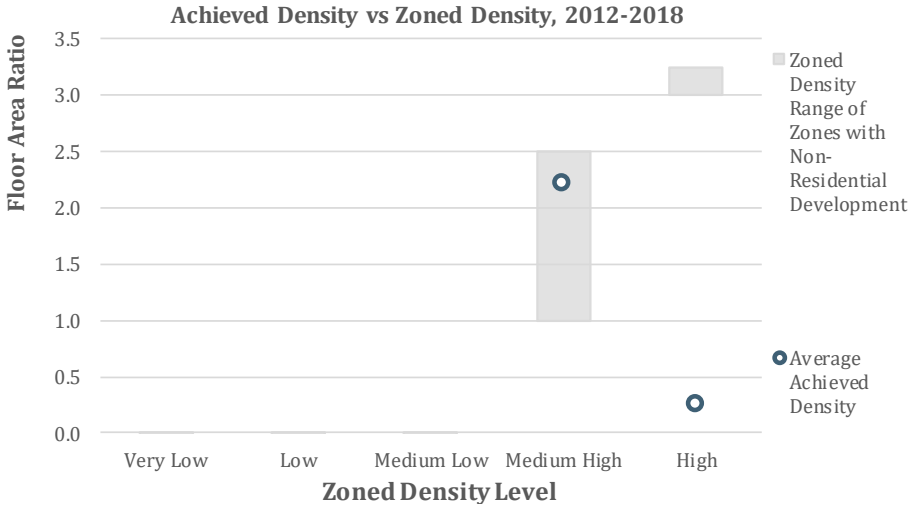
| % of Pace Needed to Achieve 2035 Jobs Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| 252.6% | 4.28% | Met Target |

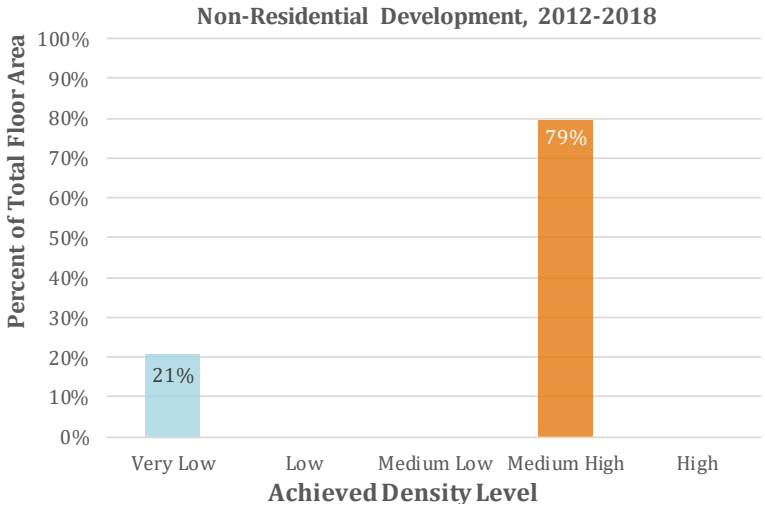
Since 2006, Newcastle has grown at 253% of the pace needed to achieve its 2035 jobs growth target of 853 units. During this period, the total number of jobs in Newcastle grew by roughly 51%. Newcastle has achieved its 2035 jobs growth target.

## Non-Residential Achieved Densities

| Zoned Density (FAR) | | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|---|
| Very Low | 0 - 0.35 FAR | 0 | 0 | |
| Low | 0.35 - 0.5 FAR | 0 | 0 | |
| Medium Low | 0.5 - 1.0 FAR | 0 | 0 | |
| Medium High | 1.0 - 3.0 FAR | 40,769 | 90,451 | 2.2 |
| High | 3.0 & up FAR | 95,013 | 23,330 | 0.2 |
| | Total | 135,782 | 113,781 | 0.8 |

| Achieved Density Level | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|
| Very Low | 95,013 | 23,330 | 0.2 |
| Low | 0 | 0 | 0.0 |
| Medium Low | 0 | 0 | 0.0 |
| Medium High | 40,769 | 90,451 | 2.2 |
| High | 0 | 0 | 0.0 |
| Total | 135,782 | 113,781 | 0.8 |



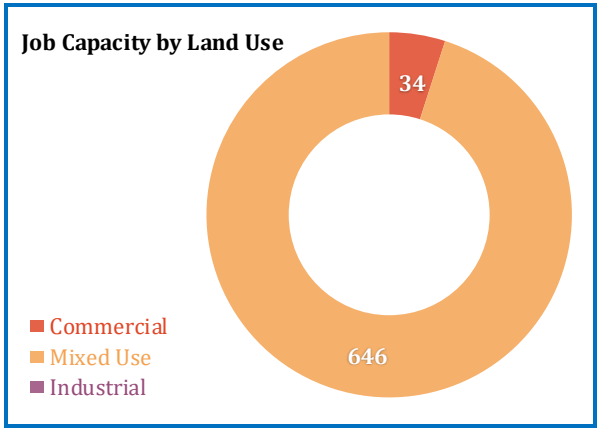



## Newcastle - Commercial/Industrial Land Supply and Job Capacity

| Land Supply | Gross Area (acres) | Critical Areas (acres) | ROWs (acres) | Public Purpose (acres) | Initial Land Supply | Market Factor | Buildable Area (acres) |
|---|---|---|---|---|---|---|---|
| **Vacant / Redev.** | | | | | | | |
| Commercial | 1.0 | 0.0 | 0.1 | 0.1 | 0.9 | 14% | 0.8 |
| Mixed Use | 58.6 | 0.0 | 2.9 | 2.9 | 52.8 | 10% | 46.9 |
| Industrial | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0% | 0.0 |
| **Non-Res Land Total** | **59.6** | **0.0** | **3.0** | **57.4** | **1033.9** | | **47.7** |

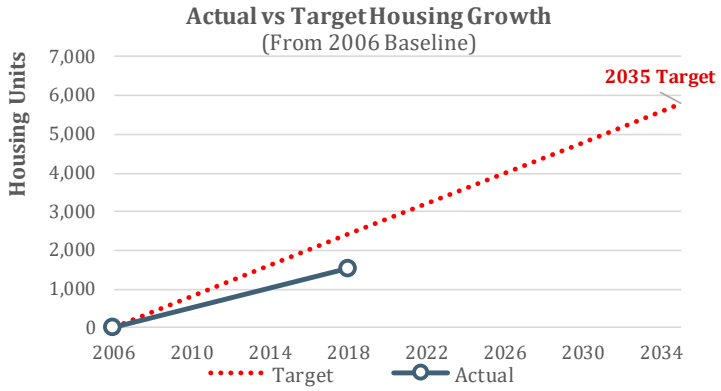
| Job Capacity by Land Use | Net Buildable Area (mil.sq.ft.) | Assumed Density Range (FAR) | Existing Floor Area (million sq.ft.) | Floor Area Capac. (million sq.ft.) | Sq. ft. per Job | Job Capacity |
|---|---|---|---|---|---|---|
| **Commercial** | | | | | | |
| Vacant | 0.00 | 0.30 | 0.00 | 0.00 | 300 | 0 |
| Redevelopable | 0.03 | 0.30 | 0.00 | 0.01 | 300 | 34 |
| **Commercial Total** | **0.03** | **0.30** | **0.00** | **0.01** | **300** | **34** |
| **Mixed-Use** | | | | | | |
| Vacant | 0.00 | 0.10 / 0.25 | 0.00 | 0.00 | 300 | 0 |
| Redevelopable | 2.04 | 0.10 / 0.25 | 0.43 | 0.19 | 300 | 646 |
| **Mixed Use Total** | **2.04** | **0.10 / 0.25** | **0.43** | **0.19** | **300** | **646** |
| **Industrial** | | | | | | |
| Vacant | 0.00 | 0.00 | 0.00 | 0.00 | 0 | 0 |
| Redevelopable | 0.00 | 0.00 | 0.00 | 0.00 | 0 | 0 |
| **Industrial Total** | **0.00** | **0.00** | **0.00** | **0.00** | **0** | **0** |
| **City Total** | | | | | | |
| Commercial | 0.03 | 0.30 | 0.69 | 0.01 | 300 | 34 |
| Mixed Use | 2.04 | 0.10 / 0.25 | 0.91 | 0.19 | 300 | 646 |
| Industrial | 0.00 | 0.00 | 0.26 | 0.00 | 0 | 0 |
| *Job Capacity in Pipeline* | | | | | | *0* |
| **City Total** | **2.08** | **0.30** | **1.86** | **0.20** | **0 / 300** | **680** |

| Job Capacity by Assumed Density Level | # | % |
|---|---|---|
| Very Low Density | 680 | 100% |
| Low Density | 0 | 0% |
| Medium Low Density | 0 | 0% |
| Medium High Density | 0 | 0% |
| High Density | 0 | 0% |
| | | |
| *Capacity in Pipeline* | | *0* |
| **Total Capacity (jobs)** | | **680** |
| Remaining Target (2018-2035) | | 0 |
| **Surplus/Deficit Capacity (jobs)** | | **680** |



# City of Shoreline

## Housing Growth and Residential Development Trends




| Shoreline Housing Growth Target: 2006-2035 | 5,800 |
|---|---|
| 2006 Estimated Housing Units | 22,173 |
| 2018 Estimated Housing Units | 23,702 |
| **Estimated Housing Growth** | **1,529** |
| **Remaining 2035 Target** | **4,271** |

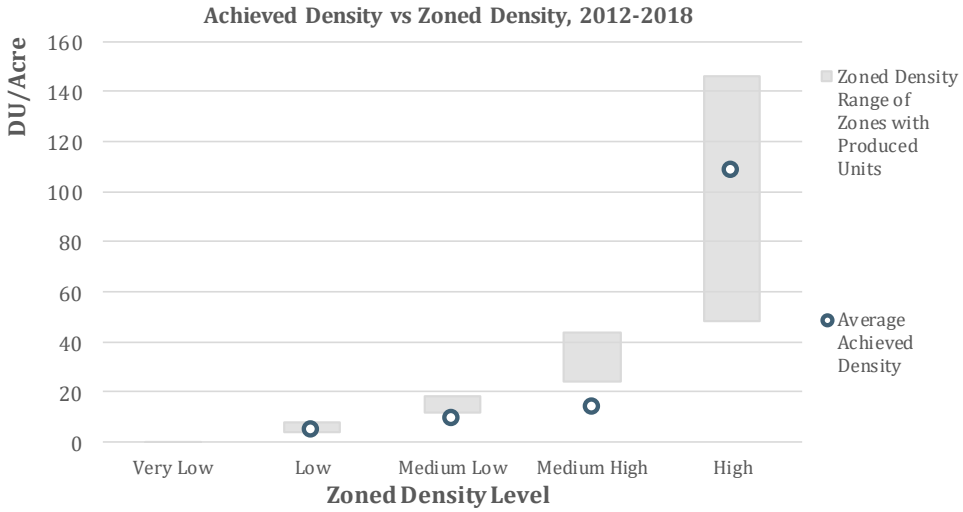
| % of Pace Needed to Achieve 2035 Housing Growth Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| 63.7% | 0.57% | 1.06% |

Since 2006, Shoreline has grown at 64% of the pace needed to achieve its 2035 housing growth target of 5,800 units. During this period, the total number of housing units in Shoreline grew by roughly 7%. At this current rate, Shoreline is under the production pace needed to meet its 2035 growth target, and needs to grow at an annual rate of 1.1% to reach its remaining target by 2035.

### Residential Achieved Densities

| Zoned Density (du/acre) | | Gross Area (acres) | Critical Areas (acres) | Public Purpose (acres) | ROWs (acres) | Net Area (acres) | Total Units | Achieved Density (DU/acre) |
|---|---|---|---|---|---|---|---|---|
| Very Low | 0 - 4 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| Low | 4 - 10 du/acre | 94.1 | 10.6 | 0.0 | 0.0 | 83.5 | 360 | **4.3** |
| Medium Low | 10 - 24 du/acre | 4.5 | 0.0 | 0.0 | 0.0 | 4.5 | 41 | **9.1** |
| Medium High | 24 - 48 du/acre | 5.8 | 0.0 | 0.0 | 0.0 | 5.8 | 81 | **14.0** |
| High | 48 & up du/acre | 15.1 | 0.0 | 0.0 | 0.0 | 15.1 | 1,639 | **108.5** |
| | **Total** | **119.5** | **10.6** | **0.0** | **0.0** | **108.8** | **2,121** | **19.5** |

| Achieved Density Level | Net Area (acres) | Total Units |
|---|---|---|
| Very Low | 35.3 | 94 |
| Low | 54.2 | 319 |
| Medium Low | 5.8 | 81 |
| Medium High | 0.0 | 0 |
| High | 13.5 | 1,627 |
| **Total** | **108.8** | **2,121** |

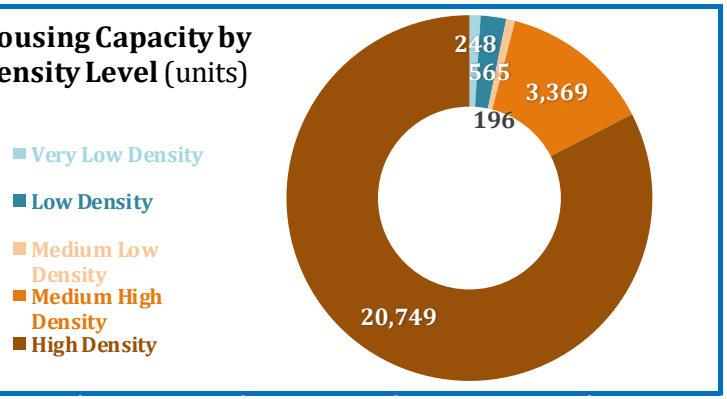


## Shoreline - Residential Land Supply and Capacity

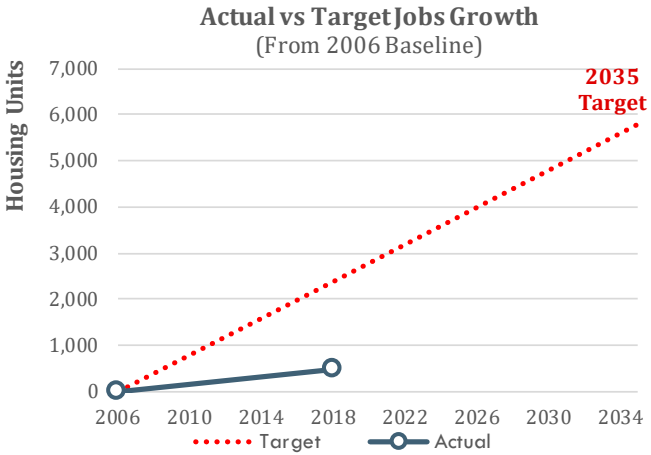
| Assumed Density Level | Vacant/ Redevelopable | Gross Acres | Critical Areas | Infrastructure Constrained Area | ROW & Public Purpose Discount | Market Factor (low/high) | Net Available Acres | Assumed Densities (low/high - units/acre) | Net Capacity (units) |
|---|---|---|---|---|---|---|---|---|---|
| Very Low Density | Vacant Subtotal | | | | 0.00 | 0.0% - 10.0% | 10.88 | 3.7 | 23 |
| | Redev Subtotal | | | | 0.00 | 0.0% - 10.0% | 95.58 | 3.7 | 225 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 106.46 | | **248** |
| Low Density | Vacant Subtotal | | | | 0.00 | 10.0% - 10.0% | 37.09 | 5.1 / 9.6 | 193 |
| | Redev Subtotal | | | | 0.00 | 10.0% - 10.0% | 233.75 | 5.1 / 9.6 | 372 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 270.84 | | **565** |
| Medium Low Density | Vacant Subtotal | | | | 0.00 | 10.0% - 20.0% | 3.64 | 11.9 / 12.0 | 44 |
| | Redev Subtotal | | | | 0.00 | 10.0% - 20.0% | 18.02 | 11.9 / 12.0 | 153 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 21.65 | | **196** |
| Medium High Density | Vacant Subtotal | | | | 0.00 | 20.0% - 30.0% | 2.84 | 25.0 / 44.0 | 119 |
| | Redev Subtotal | | | | 0.00 | 20.0% - 30.0% | 82.86 | 25.0 / 44.0 | 3,251 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 85.70 | | **3,369** |
| High Density | Vacant Subtotal | | | | 0.00 | 20.0% - 30.0% | 9.59 | 102.8 / 150.4 | 1,248 |
| | Redev Subtotal | | | | 0.00 | 20.0% - 30.0% | 164.72 | 102.8 / 150.4 | 19,501 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 174.31 | | **20,749** |
| All Zones | Vacant Total | | | | 0.00 | | 64.04 | | 1,626 |
| | Redev Total | | | | 0.00 | | 594.92 | | 23,501 |
| | **Total** | **0.00** | **0.00** | **0.00** | **0.00** | | **658.96** | | **25,127** |

| Capacity (units) | |
|---|---|
| Very Low Density Zones | 248 |
| Low Density Zones | 565 |
| Medium Low Density Zones | 196 |
| Medium High Density Zones | 3,369 |
| High Density Zones | 20,749 |
| *Capacity in Pipeline* | *2,129* |
| | |
| **Total Capacity (Units)** | **27,256** |
| Remaining Target (2018-2035) | 4,271 |
| **Surplus/Deficit Capacity (Units)** | **22,985** |

**Housing Capacity by Density Level** (units)



# Shoreline - Employment Growth and Commercial/Industrial Development Trends




| Shoreline Jobs Growth Target: 2006-2035 | 5,800 |
|---|---|
| 2006 Jobs (PSRC) | 17,411 |
| 2018 Jobs (PSRC) | 17,898 |
| **Total Jobs Growth** | **487** |
| **Remaining 2035 Target** | **5,313** |

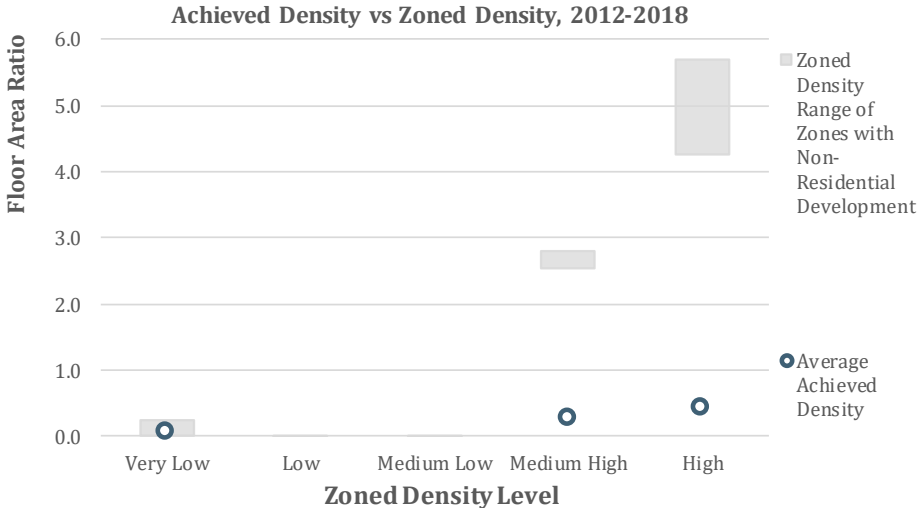
| % of Pace Needed to Achieve 2035 Jobs Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| **20.3%** | **0.23%** | **1.75%** |

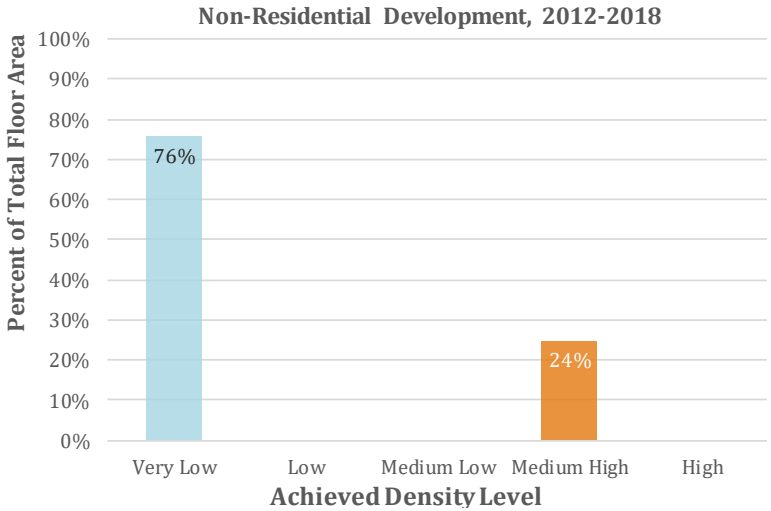
Since 2006, Shoreline has grown at 20% of the pace needed to achieve its 2035 jobs growth target of 5,800 units. During this period, the total number of jobs in Shoreline grew by roughly 3%. At this current rate, Shoreline is under the pace needed to meet its 2035 jobs growth target, and needs to grow at an annual rate of 1.7% to reach its remaining target by 2035.

## Non-Residential Achieved Densities

| Zoned Density (FAR) | | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|---|
| **Very Low** | 0 - 0.35 FAR | 7,130,116 | 470,060 | **0.1** |
| **Low** | 0.35 - 0.5 FAR | 0 | 0 | |
| **Medium Low** | 0.5 - 1.0 FAR | 0 | 0 | |
| **Medium High** | 1.0 - 3.0 FAR | 66,330 | 18,637 | **0.3** |
| **High** | 3.0 & up FAR | 1,781,187 | 756,529 | **0.4** |
| | **Total** | **8,977,633** | **1,245,226** | **0.1** |

| Achieved Density Level | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|
| **Very Low** | 8,737,630 | 941,618 | **0.1** |
| **Low** | 0 | 0 | **0.0** |
| **Medium Low** | 0 | 0 | **0.0** |
| **Medium High** | 240,003 | 303,608 | **1.3** |
| **High** | 0 | 0 | **0.0** |
| **Total** | **8,977,633** | **1,245,226** | **0.1** |



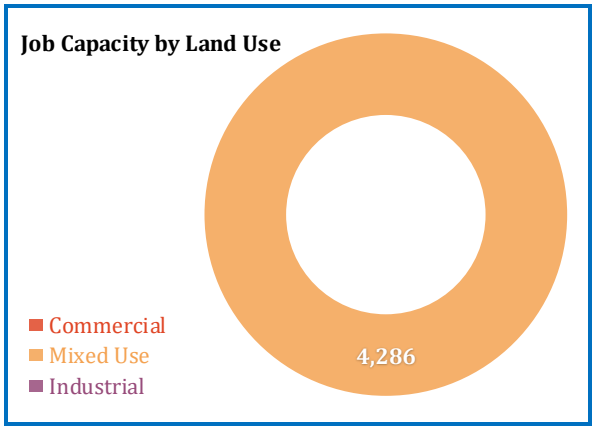



## Shoreline - Commercial/Industrial Land Supply and Job Capacity

| Land Supply | Gross Area (acres) | Critical Areas (acres) | ROWs (acres) | Public Purpose (acres) | Initial Land Supply | Market Factor | Buildable Area (acres) |
|---|---|---|---|---|---|---|---|
| **Vacant / Redev.** | | | | | | | |
| Commercial | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0% | 0.0 |
| Mixed Use | 358.2 | 0.0 | 0.0 | 0.0 | 358.2 | 20% - 30% | 260.0 |
| Industrial | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0% | 0.0 |
| **Non-Res Land Total** | **358.2** | **0.0** | **0.0** | **0.0** | **362.9** | | **260.0** |

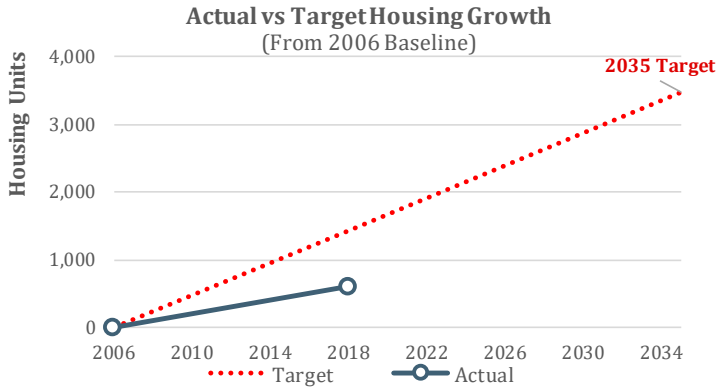
| Job Capacity by Land Use | Net Buildable Area (mil.sq.ft.) | Assumed Density Range (FAR) | Existing Floor Area (million sq.ft.) | Floor Area Capac. (million sq.ft.) | Sq. ft. per Job | Job Capacity |
|---|---|---|---|---|---|---|
| **Commercial** | | | | | | |
| Vacant | 0.00 | 0.00 | 0.00 | 0.00 | 0 | 0 |
| Redevelopable | 0.00 | 0.00 | 0.00 | 0.00 | 0 | 0 |
| **Commercial Total** | **0.00** | **0.00** | **0.00** | **0.00** | **0** | **0** |
| **Mixed-Use** | | | | | | |
| Vacant | 0.54 | 0.10 / 0.50 | 0.00 | 0.21 | 500 | 416 |
| Redevelopable | 10.78 | 0.10 / 0.50 | 2.08 | 1.93 | 500 | 3870 |
| **Mixed Use Total** | **11.33** | **0.10 / 0.50** | **2.08** | **2.14** | **500** | **4,286** |
| **Industrial** | | | | | | |
| Vacant | 0.00 | 0.00 | 0.00 | 0.00 | 0 | 0 |
| Redevelopable | 0.00 | 0.00 | 0.00 | 0.00 | 0 | 0 |
| **Industrial Total** | **0.00** | **0.00** | **0.00** | **0.00** | **0** | **0** |
| **City Total** | | | | | | |
| Commercial | 0.00 | 0.00 | 0.69 | 0.00 | 0 | 0 |
| Mixed Use | 11.33 | 0.10 / 0.50 | 0.91 | 2.14 | 500 | 4,286 |
| Industrial | 0.00 | 0.00 | 0.26 | 0.00 | 0 | 0 |
| *Job Capacity in Pipeline* | | | | | | *170* |
| **City Total** | **11.33** | **0.50** | **1.86** | **2.14** | **0 / 500** | **4,456** |

| Job Capacity by Assumed Density Level | # | % |
|---|---|---|
| Very Low Density | 3,993 | 93% |
| Low Density | 0 | 0% |
| Medium Low Density | 292 | 7% |
| Medium High Density | 0 | 0% |
| High Density | 0 | 0% |
| | | |
| *Capacity in Pipeline* | | *170* |
| **Total Capacity (jobs)** | | **4,456** |
| Remaining Target (2018-2035) | | 5,313 |
| **Surplus/Deficit Capacity (jobs)** | | **-857** |



# City of Woodinville

## Housing Growth and Residential Development Trends




| Woodinville Housing Growth Target: 2006-2035 | 3,480 |
|---|---|
| 2006 Estimated Housing Units | 4,550 |
| 2018 Estimated Housing Units | 5,154 |
| **Estimated Housing Growth** | **604** |
| Remaining 2035 Target | 2,876 |

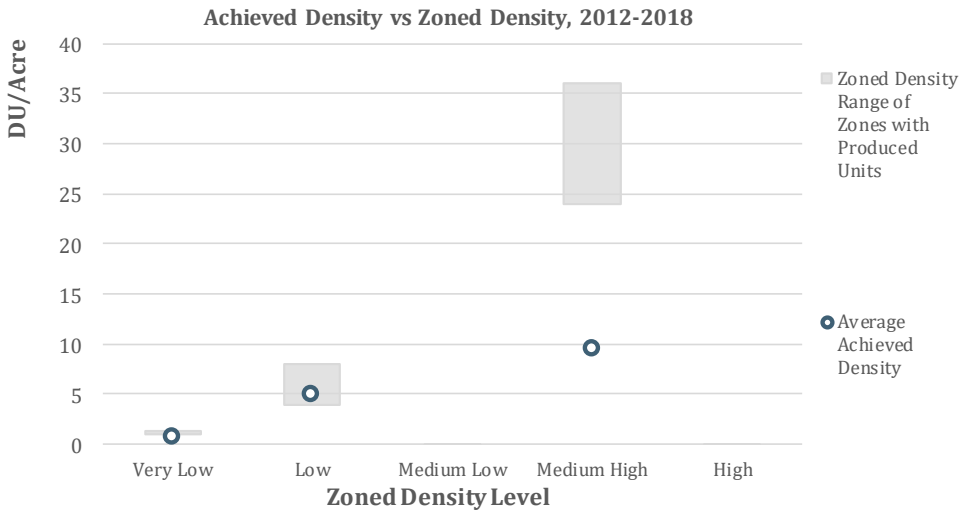
| % of Pace Needed to Achieve 2035 Housing Growth Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| 42.0% | 1.11% | 3.28% |

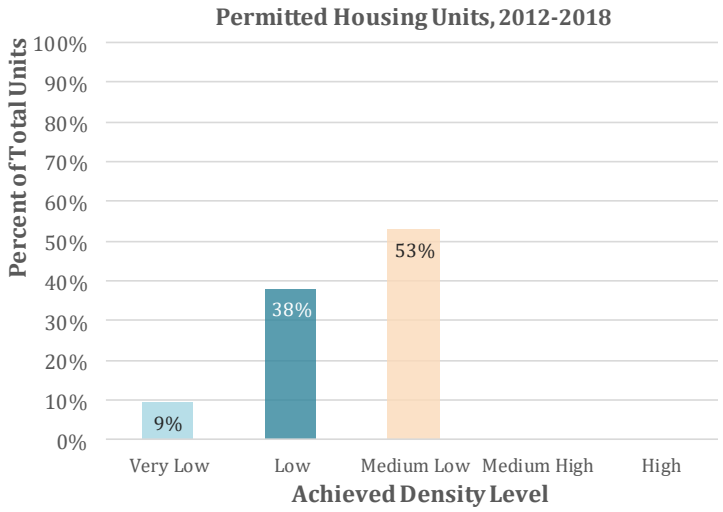
Since 2006, Woodinville has grown at 42% of the pace needed to achieve its 2035 housing growth target of 3,480 units. During this period, the total number of housing units in Woodinville grew by roughly 13%. At this current rate, Woodinville is under the production pace needed to meet its 2035 growth target, and needs to grow at an annual rate of 3.3% to reach its remaining target by 2035.

### Residential Achieved Densities

| Zoned Density (du/acre) | | Gross Area (acres) | Critical Areas (acres) | Public Purpose (acres) | ROWs (acres) | Net Area (acres) | Total Units | Achieved Density (DU/acre) |
|---|---|---|---|---|---|---|---|---|
| Very Low | 0 - 4 du/acre | 57.6 | 1.1 | 0.0 | 0.1 | 56.3 | 40 | **0.7** |
| Low | 4 - 10 du/acre | 35.2 | 0.0 | 0.0 | 0.0 | 35.2 | 171 | **4.9** |
| Medium Low | 10 - 24 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| Medium High | 24 - 48 du/acre | 28.3 | 2.9 | 0.0 | 0.2 | 25.3 | 237 | **9.4** |
| High | 48 & up du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| | **Total** | **121.1** | **4.0** | **0.0** | **0.3** | **116.7** | **448** | **3.8** |

| Achieved Density Level | Net Area (acres) | Total Units |
|---|---|---|
| Very Low | 61.5 | 42 |
| Low | 33.5 | 169 |
| Medium Low | 21.8 | 237 |
| Medium High | 0.0 | 0 |
| High | 0.0 | 0 |
| **Total** | **116.7** | **448** |



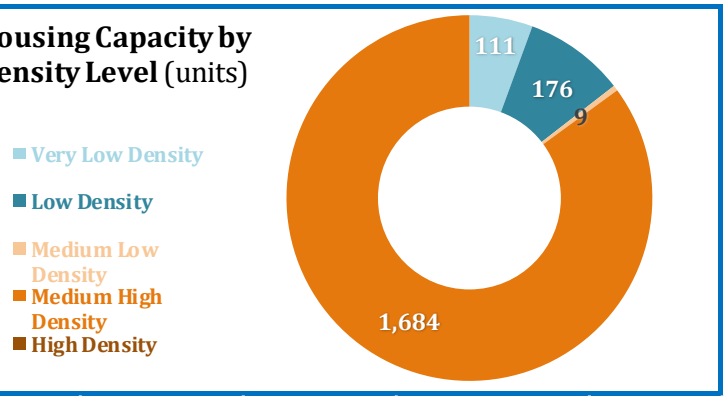



## Woodinville - Residential Land Supply and Capacity

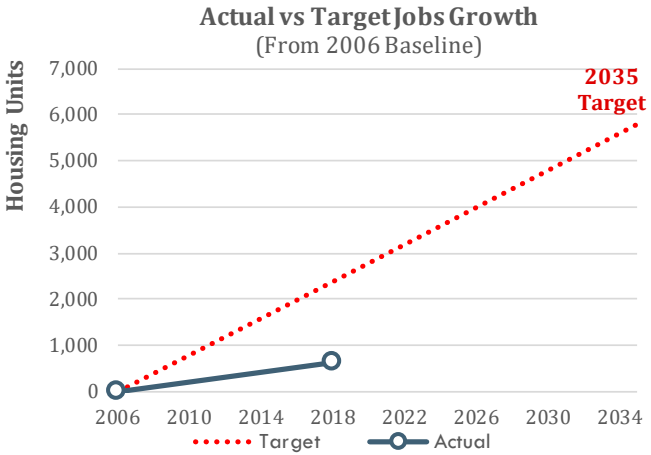
| Assumed Density Level | Vacant/ Redevelopable | Gross Acres | Critical Areas | Infrastructure Constrained Area | ROW & Public Purpose Discount | Market Factor (low/high) | Net Available Acres | Assumed Densities (low/high - units/acre) | Net Capacity (units) |
|---|---|---|---|---|---|---|---|---|---|
| Very Low Density | Vacant Subtotal | | | | 20.84 | 5.0% - 5.0% | 111.14 | 0.7 / 1.2 | 91 |
| | Redev Subtotal | | | | 28.62 | 5.0% - 5.0% | 152.66 | 0.7 / 1.2 | 20 |
| | **Subtotal** | 538.85 | 65.66 | 143.44 | 49.46 | | 263.80 | | **111** |
| Low Density | Vacant Subtotal | | | | 4.46 | 5.0% - 5.0% | 23.81 | 5.0 / 8.0 | 122 |
| | Redev Subtotal | | | | 3.77 | 5.0% - 5.0% | 20.10 | 5.0 / 8.0 | 55 |
| | **Subtotal** | 123.94 | 65.62 | 10.05 | 8.23 | | 43.91 | | **176** |
| Medium Low Density | Vacant Subtotal | | | | 0.13 | 5.0% - 5.0% | 0.68 | 12.0 / 18.0 | 9 |
| | Redev Subtotal | | | | 2.57 | 5.0% - 5.0% | 13.70 | 12.0 / 18.0 | 0 |
| | **Subtotal** | 22.03 | 4.05 | 0.00 | 2.70 | | 14.38 | | **9** |
| Medium High Density | Vacant Subtotal | | | | 4.51 | 1.0% - 80.0% | 22.73 | 24.0 / 36.0 | 784 |
| | Redev Subtotal | | | | 5.21 | 1.0% - 80.0% | 25.42 | 24.0 / 36.0 | 901 |
| | **Subtotal** | 105.76 | 10.65 | 2.68 | 9.72 | | 48.14 | | **1,684** |
| High Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 0.72 | 100.0% - 100.0% | 0.00 | 48.0 | 0 |
| | **Subtotal** | 4.78 | 0.00 | 0.00 | 0.72 | | 0.00 | | **0** |
| All Zones | Vacant Total | | | | 29.94 | | 158.36 | | 1,006 |
| | Redev Total | | | | 40.89 | | 211.88 | | 975 |
| | **Total** | **795.36** | **145.98** | **156.17** | **70.83** | | **370.24** | | **1,981** |

| Capacity (units) | |
|---|---|
| Very Low Density Zones | 111 |
| Low Density Zones | 176 |
| Medium Low Density Zones | 9 |
| Medium High Density Zones | 1,684 |
| High Density Zones | 0 |
| *Capacity in Pipeline* | *1,724* |
| | |
| **Total Capacity (Units)** | **3,705** |
| Remaining Target (2018-2035) | 2,876 |
| **Surplus/Deficit Capacity (Units)** | **829** |

**Housing Capacity by Density Level** (units)



# Woodinville - Employment Growth and Commercial/Industrial Development Trends




| Woodinville Jobs Growth Target: 2006-2035 | 5,800 |
|---|---|
| 2006 Jobs (PSRC) | 11,876 |
| 2018 Jobs (PSRC) | 12,519 |
| **Total Jobs Growth** | **643** |
| **Remaining 2035 Target** | **5,157** |

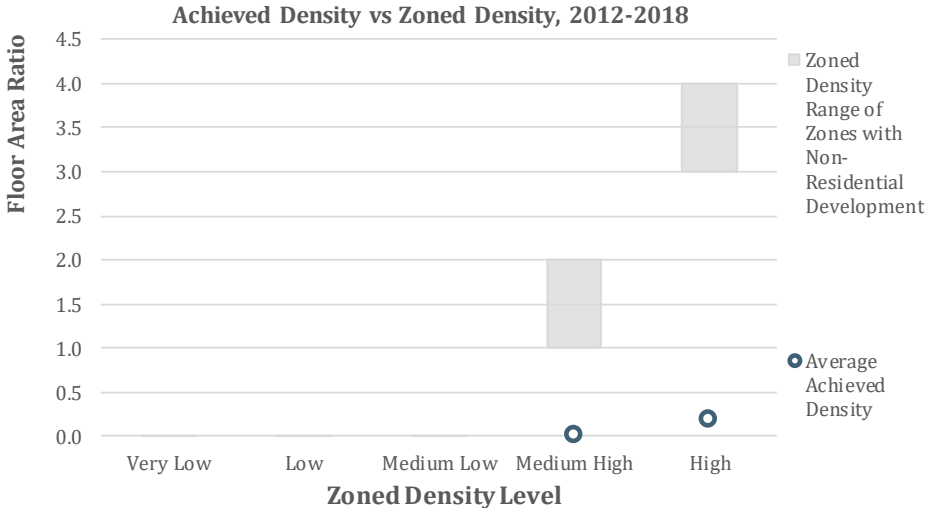
| % of Pace Needed to Achieve 2035 Jobs Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| **26.8%** | **0.45%** | **2.42%** |

Since 2006, Woodinville has grown at 27% of the pace needed to achieve its 2035 jobs growth target of 5,800 units. During this period, the total number of jobs in Woodinville grew by roughly 5%. At this current rate, Woodinville is under the pace needed to meet its 2035 jobs growth target, and needs to grow at an annual rate of 2.4% to reach its remaining target by 2035.

## Non-Residential Achieved Densities

| Zoned Density (FAR) | | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|---|
| **Very Low** | 0 - 0.35 FAR | 0 | 0 | |
| **Low** | 0.35 - 0.5 FAR | 0 | 0 | |
| **Medium Low** | 0.5 - 1.0 FAR | 0 | 0 | |
| **Medium High** | 1.0 - 3.0 FAR | 115,688 | 1,707 | **0.0** |
| **High** | 3.0 & up FAR | 108,260 | 20,536 | **0.2** |
| | **Total** | **223,948** | **22,243** | **0.1** |

| Achieved Density Level | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|
| **Very Low** | 223,948 | 22,243 | **0.1** |
| **Low** | 0 | 0 | **0.0** |
| **Medium Low** | 0 | 0 | **0.0** |
| **Medium High** | 0 | 0 | **0.0** |
| **High** | 0 | 0 | **0.0** |
| **Total** | **223,948** | **22,243** | **0.1** |

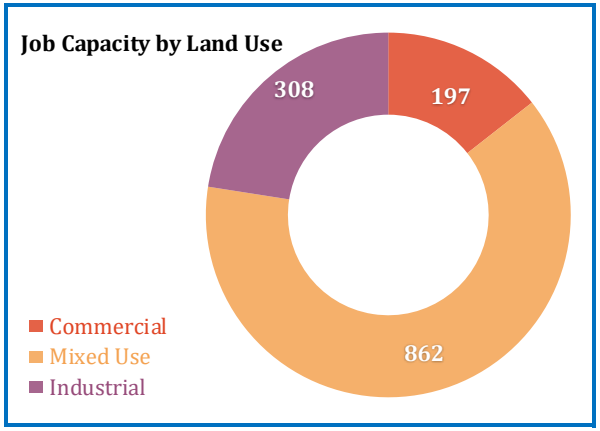


## Woodinville - Commercial/Industrial Land Supply and Job Capacity

| Land Supply | Gross Area (acres) | Critical Areas (acres) | ROWs (acres) | Public Purpose (acres) | Initial Land Supply | Market Factor | Buildable Area (acres) |
|---|---|---|---|---|---|---|---|
| **Vacant / Redev.** | | | | | | | |
| Commercial | 53.8 | 36.3 | 1.7 | 0.0 | 15.7 | 0% - 50% | 12.0 |
| Mixed Use | 67.7 | 10.7 | 5.7 | 0.0 | 51.3 | 1% - 5% | 50.6 |
| Industrial | 80.0 | 24.2 | 5.6 | 0.0 | 50.1 | 15% | 41.8 |
| **Non-Res Land Total** | **201.4** | **71.2** | **13.0** | **0.0** | **117.2** | | **104.4** |

| Job Capacity by Land Use | Net Buildable Area (mil.sq.ft.) | Assumed Density Range (FAR) | Existing Floor Area (million sq.ft.) | Floor Area Capac. (million sq.ft.) | Sq. ft. per Job | Job Capacity |
|---|---|---|---|---|---|---|
| **Commercial** | | | | | | |
| Vacant | 0.46 | 0.20 / 1.00 | 0.00 | 0.11 | 450 / 600 | 190 |
| Redevelopable | 0.07 | 0.20 / 1.00 | 0.01 | 0.00 | 450 / 600 | 7 |
| **Commercial Total** | **0.52** | **0.20 / 1.00** | **0.01** | **0.12** | **450 / 600** | **197** |
| **Mixed-Use** | | | | | | |
| Vacant | 1.04 | 0.22 / 0.40 | 0.00 | 0.25 | 300 | 840 |
| Redevelopable | 1.16 | 0.22 / 0.40 | 0.26 | 0.01 | 300 | 21 |
| **Mixed Use Total** | **2.20** | **0.22 / 0.40** | **0.26** | **0.26** | **300** | **862** |
| **Industrial** | | | | | | |
| Vacant | 1.25 | 0.17 | 0.00 | 0.21 | 700 | 303 |
| Redevelopable | 0.57 | 0.17 | 0.09 | 0.00 | 700 | 4 |
| **Industrial Total** | **1.82** | **0.17** | **0.09** | **0.22** | **700** | **308** |
| **City Total** | | | | | | |
| Commercial | 0.52 | 0.20 / 1.00 | 0.69 | 0.12 | 450 / 600 | 197 |
| Mixed Use | 2.20 | 0.22 / 0.40 | 0.91 | 0.26 | 300 | 862 |
| Industrial | 1.82 | 0.17 | 0.26 | 0.22 | 700 | 308 |
| *Job Capacity in Pipeline* | | | | | | *3,006* |
| **City Total** | **4.55** | **0.17 / 1.00** | **1.86** | **0.59** | **300 / 700** | **4,373** |

| Job Capacity by Assumed Density Level | # | % |
|---|---|---|
| Very Low Density | 1,176 | 86% |
| Low Density | 190 | 14% |
| Medium Low Density | 0 | 0% |
| Medium High Density | 0 | 0% |
| High Density | 0 | 0% |
| | | |
| *Capacity in Pipeline* | | *3,006* |
| **Total Capacity (jobs)** | | **4,373** |
| Remaining Target (2018-2035) | | 5,157 |
| **Surplus/Deficit Capacity (jobs)** | | **-784** |

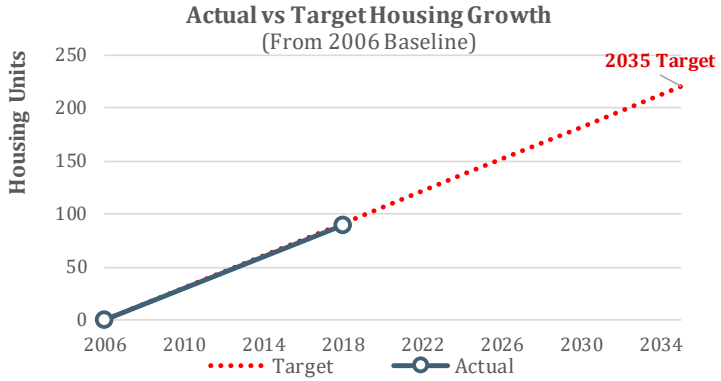


# Cities and Towns

City of Algona
City of Beaux Arts
City of Black Diamond
City of Carnation
City of Clyde Hill
City of Covington
City of Duvall
City of Enumclaw
Town of Hunts Point
City of Maple Valley
City of Medina
City of Milton
City of Normandy Park
City of North Bend
City of Pacific
City of Sammamish
Town of Skykomish
City of Snoqualmie
Town of Yarrow Point

# City of Algona

## Housing Growth and Residential Development Trends




| Algona Housing Growth Target: 2006-2035 | 220 |
|---|---|
| 2006 Estimated Housing Units | 960 |
| 2018 Estimated Housing Units | 1,049 |
| **Estimated Housing Growth** | **89** |
| Remaining 2035 Target | 132 |

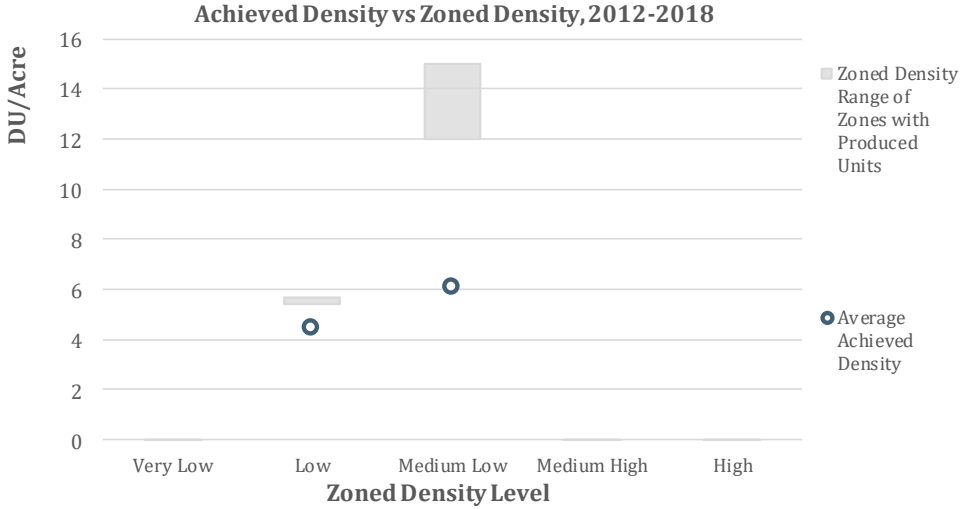
| % of Pace Needed to Achieve 2035 Housing Growth Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| 97.3% | 0.77% | 0.74% |

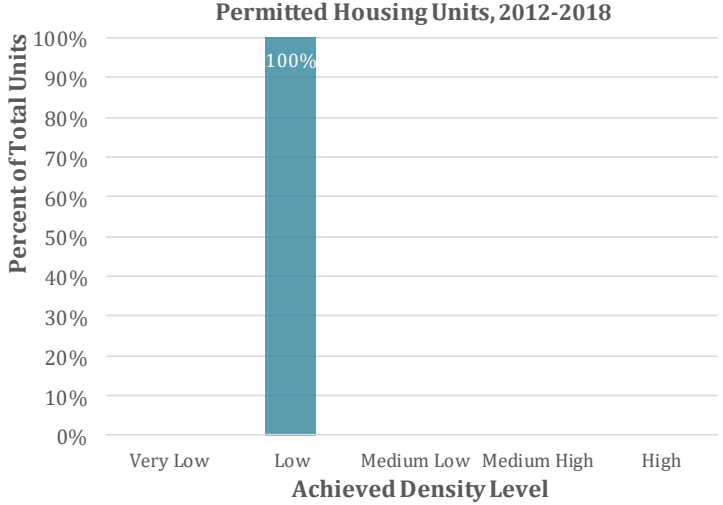
Since 2006, Algona has grown at 97% of the pace needed to achieve its 2035 housing growth target of 220 units. During this period, the total number of housing units in Algona grew by roughly 9%. At this current rate, Algona is under the production pace needed to meet its 2035 growth target, and needs to grow at an annual rate of 0.7% to reach its remaining target by 2035.

### Residential Achieved Densities

| Zoned Density (du/acre) | | Gross Area (acres) | Critical Areas (acres) | Public Purpose (acres) | ROWs (acres) | Net Area (acres) | Total Units | Achieved Density (DU/acre) |
|---|---|---|---|---|---|---|---|---|
| Very Low | 0 - 4 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| Low | 4 - 10 du/acre | 2.9 | 0.0 | 0.0 | 0.0 | 2.9 | 13 | **4.4** |
| Medium Low | 10 - 24 du/acre | 4.0 | 0.0 | 0.0 | 0.0 | 4.0 | 24 | **6.1** |
| Medium High | 24 - 48 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| High | 48 & up du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| | **Total** | **6.9** | **0.0** | **0.0** | **0.0** | **6.9** | **37** | **5.4** |

| Achieved Density Level | Net Area (acres) | Total Units |
|---|---|---|
| Very Low | 0.0 | 0 |
| Low | 6.9 | 37 |
| Medium Low | 0.0 | 0 |
| Medium High | 0.0 | 0 |
| High | 0.0 | 0 |
| **Total** | **6.9** | **37** |



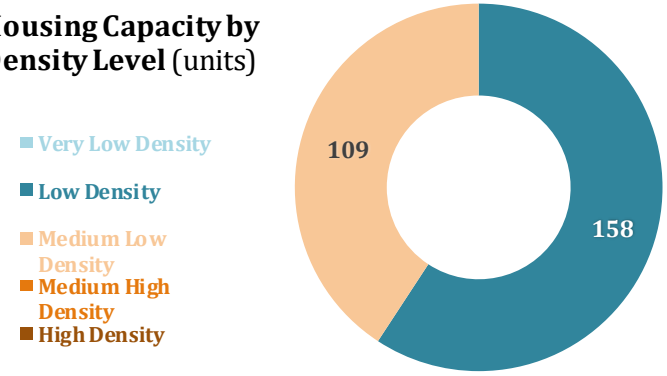



## Algona - Residential Land Supply and Capacity

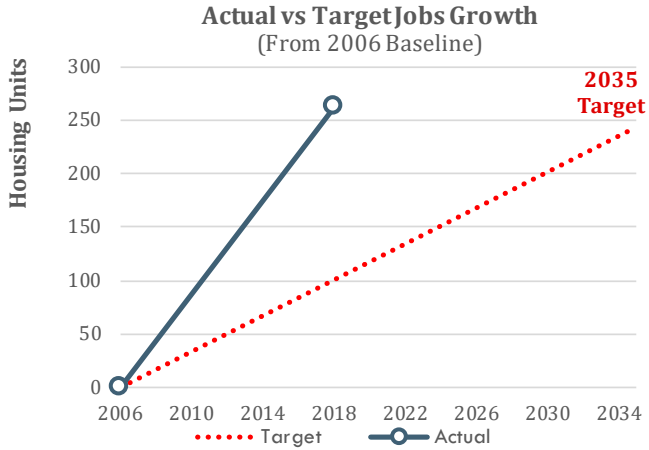
| Assumed Density Level | Vacant/ Redevelopable | Gross Acres | Critical Areas | Infrastructure Constrained Area | ROW & Public Purpose Discount | Market Factor (low/high) | Net Available Acres | Assumed Densities (low/high - units/acre) | Net Capacity (units) |
|---|---|---|---|---|---|---|---|---|---|
| Very Low Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | | **0** |
| Low Density | Vacant Subtotal | | | | 2.66 | 9.0% - 9.0% | 9.44 | 4.1 | 38 |
| | Redev Subtotal | | | | 9.98 | 9.0% - 9.0% | 35.43 | 4.1 | 119 |
| | **Subtotal** | 63.29 | 0.05 | 0.00 | 12.64 | | 44.87 | | **158** |
| Medium Low Density | Vacant Subtotal | | | | 1.96 | 9.0% - 35.0% | 4.80 | 12.0 / 15.0 | 61 |
| | Redev Subtotal | | | | 1.22 | 9.0% - 35.0% | 4.07 | 12.0 / 15.0 | 48 |
| | **Subtotal** | 16.68 | 0.11 | 0.59 | 3.18 | | 8.87 | | **109** |
| Medium High Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | | **0** |
| High Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | | **0** |
| All Zones | Vacant Total | | | | 4.62 | | 14.24 | | 99 |
| | Redev Total | | | | 11.20 | | 39.50 | | 167 |
| | **Total** | **79.97** | **0.16** | **0.59** | **15.82** | | **53.74** | | **266** |

| Capacity (units) | |
|---|---|
| Very Low Density Zones | 0 |
| Low Density Zones | 158 |
| Medium Low Density Zones | 109 |
| Medium High Density Zones | 0 |
| High Density Zones | 0 |
| *Capacity in Pipeline* | *0* |
| **Total Capacity (Units)** | **266** |
| Remaining Target (2018-2035) | 132 |
| **Surplus/Deficit Capacity (Units)** | **135** |

**Housing Capacity by Density Level** (units)



# Algona - Employment Growth and Commercial/Industrial Development Trends




| Algona Jobs Growth Target: 2006-2035 | 244 |
|---|---|
| 2006 Jobs (PSRC) | 1,879 |
| 2018 Jobs (PSRC) | 2,142 |
| **Total Jobs Growth** | **263** |
| **Remaining 2035 Target** | **0** |

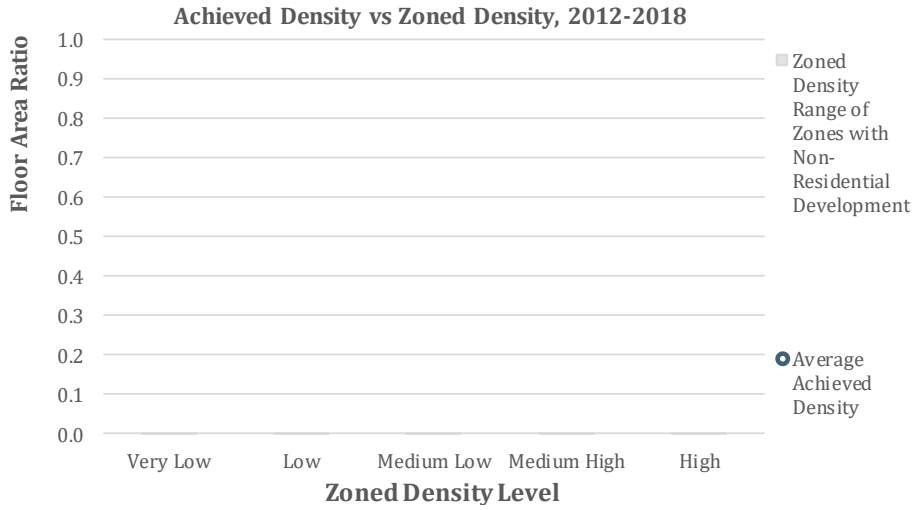
| % of Pace Needed to Achieve 2035 Jobs Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| **260.9%** | **1.17%** | **Met Target** |

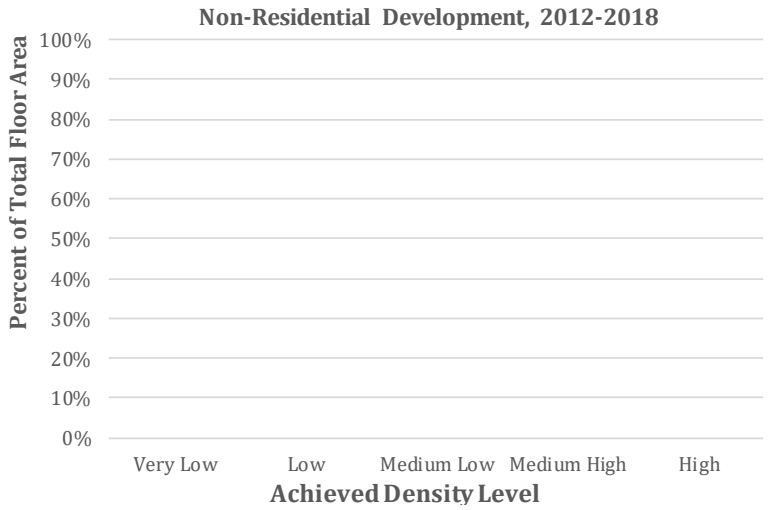
Since 2006, Algona has grown at 261% of the pace needed to achieve its 2035 jobs growth target of 244 units. During this period, the total number of jobs in Algona grew by roughly 14%. Algona has achieved its 2035 jobs growth target.

## Non-Residential Achieved Densities

| Zoned Density (FAR) | | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|---|
| **Very Low** | 0 - 0.35 FAR | 0 | 0 | |
| **Low** | 0.35 - 0.5 FAR | 0 | 0 | |
| **Medium Low** | 0.5 - 1.0 FAR | 0 | 0 | |
| **Medium High** | 1.0 - 3.0 FAR | 0 | 0 | |
| **High** | 3.0 & up FAR | 0 | 0 | |
| | **Total** | **0** | **0** | |

| Achieved Density Level | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|
| **Very Low** | 0 | 0 | **0.0** |
| **Low** | 0 | 0 | **0.0** |
| **Medium Low** | 0 | 0 | **0.0** |
| **Medium High** | 0 | 0 | **0.0** |
| **High** | 0 | 0 | **0.0** |
| **Total** | **0** | **0** | **0.0** |



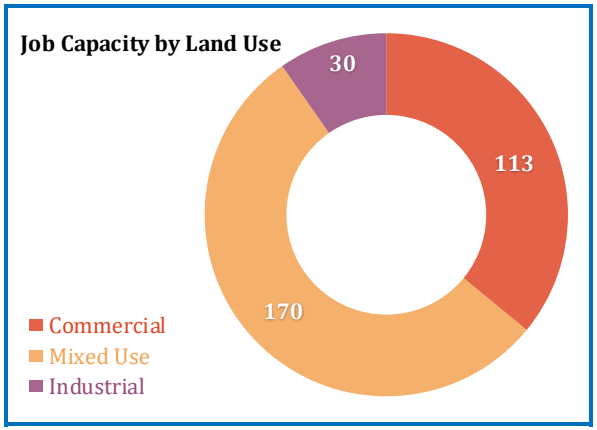



## Algona - Commercial/Industrial Land Supply and Job Capacity

| Land Supply | Gross Area (acres) | Critical Areas (acres) | ROWs (acres) | Public Purpose (acres) | Initial Land Supply | Market Factor | Buildable Area (acres) |
|---|---|---|---|---|---|---|---|
| **Vacant / Redev.** | | | | | | | |
| Commercial | 32.1 | 13.8 | 1.8 | 1.8 | 14.6 | 35% | 8.2 |
| Mixed Use | 9.3 | 0.0 | 0.9 | 0.9 | 7.4 | 35% | 4.2 |
| Industrial | 6.6 | 3.2 | 0.3 | 0.3 | 2.7 | 43% | 1.3 |
| **Non-Res Land Total** | **48.1** | **17.1** | **3.1** | **3.1** | **24.8** | | **13.7** |

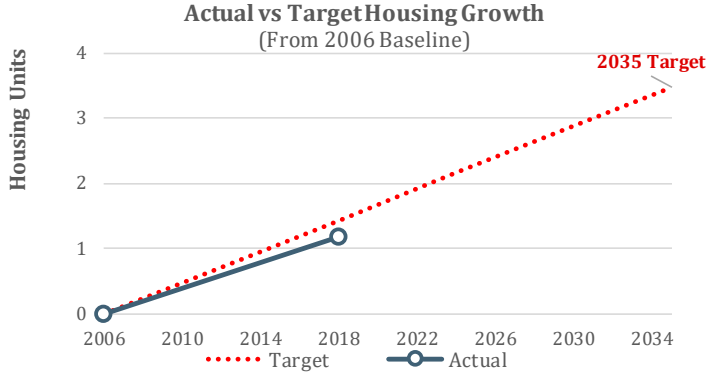
| Job Capacity by Land Use | Net Buildable Area (mil.sq.ft.) | Assumed Density Range (FAR) | Existing Floor Area (million sq.ft.) | Floor Area Capac. (million sq.ft.) | Sq. ft. per Job | Job Capacity |
|---|---|---|---|---|---|---|
| **Commercial** | | | | | | |
| Vacant | 0.33 | 0.30 | 0.00 | 0.10 | 950 | 105 |
| Redevelopable | 0.03 | 0.30 | 0.00 | 0.01 | 950 | 8 |
| **Commercial Total** | **0.36** | **0.30** | **0.00** | **0.11** | **950** | **113** |
| **Mixed-Use** | | | | | | |
| Vacant | 0.16 | 0.35 | 0.00 | 0.06 | 375 | 152 |
| Redevelopable | 0.02 | 0.35 | 0.00 | 0.01 | 375 | 18 |
| **Mixed Use Total** | **0.18** | **0.35** | **0.00** | **0.06** | **375** | **170** |
| **Industrial** | | | | | | |
| Vacant | 0.05 | 0.50 | 0.00 | 0.03 | 900 | 30 |
| Redevelopable | 0.00 | 0.00 | 0.00 | 0.00 | 0 | 0 |
| **Industrial Total** | **0.05** | **0.50** | **0.00** | **0.03** | **900** | **30** |
| **City Total** | | | | | | |
| Commercial | 0.36 | 0.30 | 0.69 | 0.11 | 950 | 113 |
| Mixed Use | 0.18 | 0.35 | 0.91 | 0.06 | 375 | 170 |
| Industrial | 0.05 | 0.50 | 0.26 | 0.03 | 900 | 30 |
| *Job Capacity in Pipeline* | | | | | | *0* |
| **City Total** | **0.60** | **0.50** | **1.86** | **0.20** | **0 / 950** | **313** |

| Job Capacity by Assumed Density Level | # | % |
|---|---|---|
| Very Low Density | 113 | 36% |
| Low Density | 170 | 54% |
| Medium Low Density | 30 | 10% |
| Medium High Density | 0 | 0% |
| High Density | 0 | 0% |
| | | |
| *Capacity in Pipeline* | | *0* |
| **Total Capacity (jobs)** | | **313** |
| Remaining Target (2018-2035) | | 0 |
| **Surplus/Deficit Capacity (jobs)** | | **313** |



# City of Beaux Arts

## Housing Growth and Residential Development Trends




| Beaux Arts Village Housing Growth Target: 2006-2035 | 3 |
|---|---|
| 2006 Estimated Housing Units | 119 |
| 2018 Estimated Housing Units | 120 |
| **Estimated Housing Growth** | **1** |
| Remaining 2035 Target | 2 |

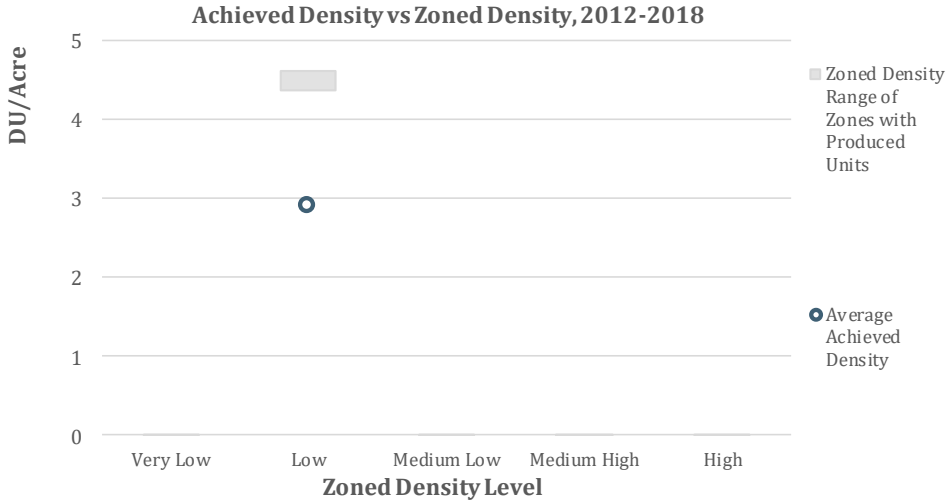
| % of Pace Needed to Achieve 2035 Housing Growth Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| 81.5% | 0.08% | 0.11% |

Since 2006, Beaux Arts Village has grown at 82% of the pace needed to achieve its 2035 housing growth target of 3 units. During this period, the total number of housing units in Beaux Arts Village grew by roughly 1%. At this current rate, Beaux Arts Village is under the production pace needed to meet its 2035 growth target, and needs to grow at an annual rate of 0.1% to reach its remaining target by 2035.

### Residential Achieved Densities

| Zoned Density (du/acre) | | Gross Area (acres) | Critical Areas (acres) | Public Purpose (acres) | ROWs (acres) | Net Area (acres) | Total Units | Achieved Density (DU/acre) |
|---|---|---|---|---|---|---|---|---|
| Very Low | 0 - 4 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| Low | 4 - 10 du/acre | 1.0 | 0.0 | 0.0 | 0.0 | 1.0 | 3 | 2.9 |
| Medium Low | 10 - 24 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| Medium High | 24 - 48 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| High | 48 & up du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| | Total | 1.0 | 0.0 | 0.0 | 0.0 | 1.0 | 3 | 2.9 |

| Achieved Density Level | Net Area (acres) | Total Units |
|---|---|---|
| Very Low | 1.0 | 3 |
| Low | 0.0 | 0 |
| Medium Low | 0.0 | 0 |
| Medium High | 0.0 | 0 |
| High | 0.0 | 0 |
| Total | 1.0 | 3 |

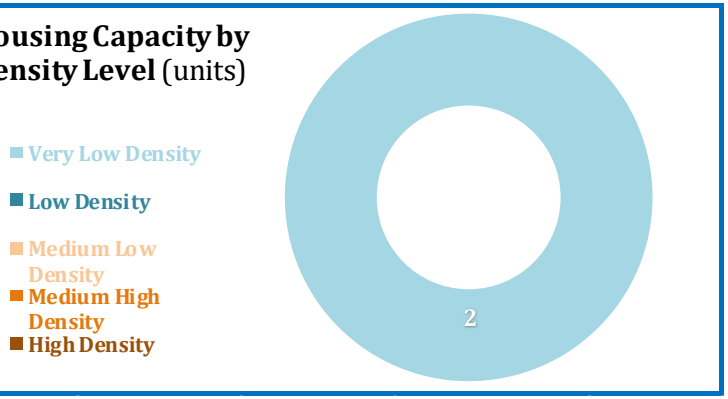


## Beaux Arts - Residential Land Supply and Capacity

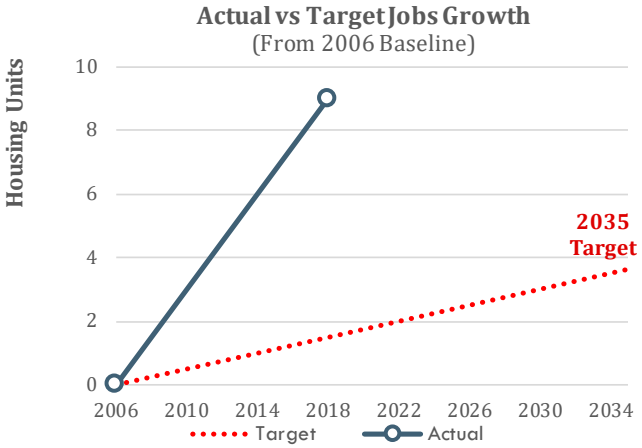
| Assumed Density Level | Vacant/ Redevelopable | Gross Acres | Critical Areas | Infrastructure Constrained Area | ROW & Public Purpose Discount | Market Factor (low/high) | Net Available Acres | Assumed Densities (low/high - units/acre) | Net Capacity (units) |
|---|---|---|---|---|---|---|---|---|---|
| Very Low Density | Vacant Subtotal | | | | 0.00 | 10.0% - 10.0% | 0.31 | 2.9 | 1 |
| | Redev Subtotal | | | | 0.00 | 10.0% - 10.0% | 0.66 | 2.9 | 1 |
| | **Subtotal** | 6.15 | 1.64 | 0.00 | 0.00 | | 0.97 | | **2** |
| Low Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | | **0** |
| Medium Low Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | | **0** |
| Medium High Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | | **0** |
| High Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | | **0** |
| All Zones | Vacant Total | | | | 0.00 | | 0.31 | | 1 |
| | Redev Total | | | | 0.00 | | 0.66 | | 1 |
| | **Total** | **6.15** | **1.64** | **0.00** | **0.00** | | **0.97** | | **2** |

| Capacity (units) | |
|---|---|
| Very Low Density Zones | 2 |
| Low Density Zones | 0 |
| Medium Low Density Zones | 0 |
| Medium High Density Zones | 0 |
| High Density Zones | 0 |
| *Capacity in Pipeline* | *0* |
| **Total Capacity (Units)** | **2** |
| Remaining Target (2018-2035) | 2 |
| **Surplus/Deficit Capacity (Units)** | **0** |

**Housing Capacity by Density Level** (units)



# Beaux Arts - Employment Growth and Commercial/Industrial Development Trends




| Beaux Arts Village Jobs Growth Target: 2006-2035 | 4 |
|---|---|
| 2006 Jobs (PSRC) | 13 |
| 2018 Jobs (PSRC) | 22 |
| **Total Jobs Growth** | **9** |
| **Remaining 2035 Target** | **0** |

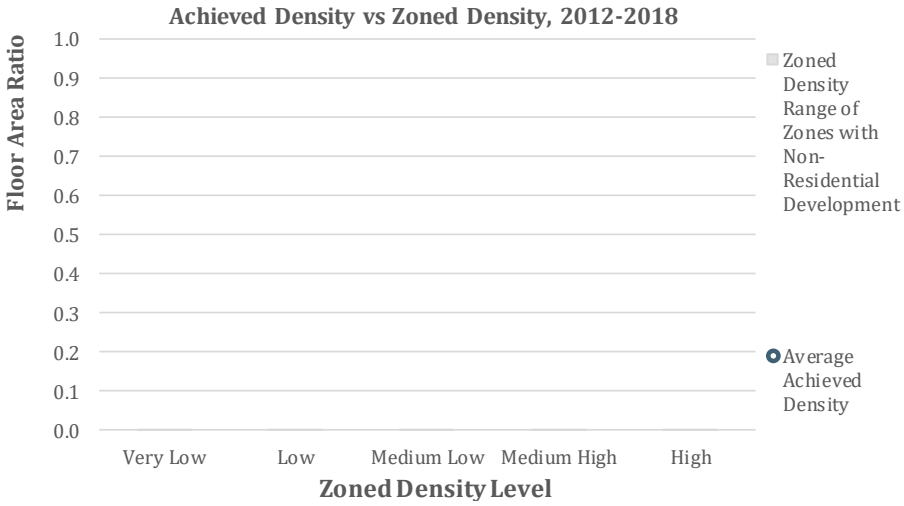
| % of Pace Needed to Achieve 2035 Jobs Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| **595.2%** | **5.77%** | **Met Target** |

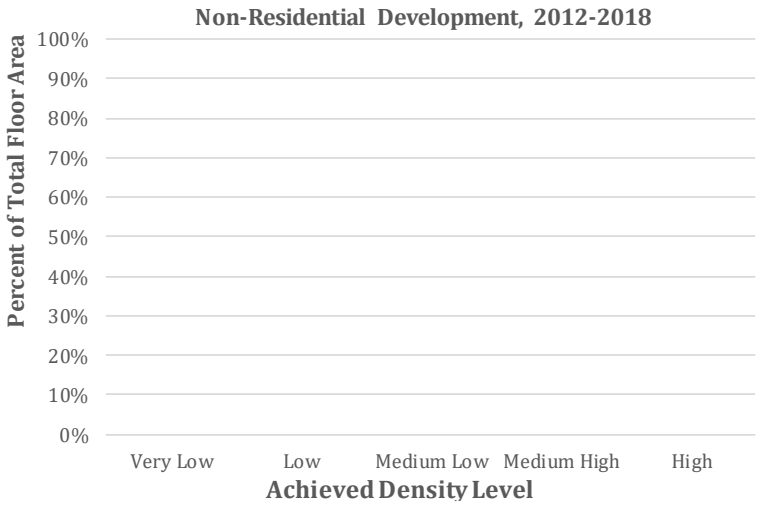
Since 2006, Beaux Arts Village has grown at 595% of the pace needed to achieve its 2035 jobs growth target of 4 units. During this period, the total number of jobs in Beaux Arts Village grew by roughly 69%. Beaux Arts Village has achieved its 2035 jobs growth target.

## Non-Residential Achieved Densities

| Zoned Density (FAR) | | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|---|
| **Very Low** | 0 - 0.35 FAR | 0 | 0 | |
| **Low** | 0.35 - 0.5 FAR | 0 | 0 | |
| **Medium Low** | 0.5 - 1.0 FAR | 0 | 0 | |
| **Medium High** | 1.0 - 3.0 FAR | 0 | 0 | |
| **High** | 3.0 & up FAR | 0 | 0 | |
| | **Total** | **0** | **0** | |

| Achieved Density Level | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|
| **Very Low** | 0 | 0 | **0.0** |
| **Low** | 0 | 0 | **0.0** |
| **Medium Low** | 0 | 0 | **0.0** |
| **Medium High** | 0 | 0 | **0.0** |
| **High** | 0 | 0 | **0.0** |
| **Total** | **0** | **0** | **0.0** |



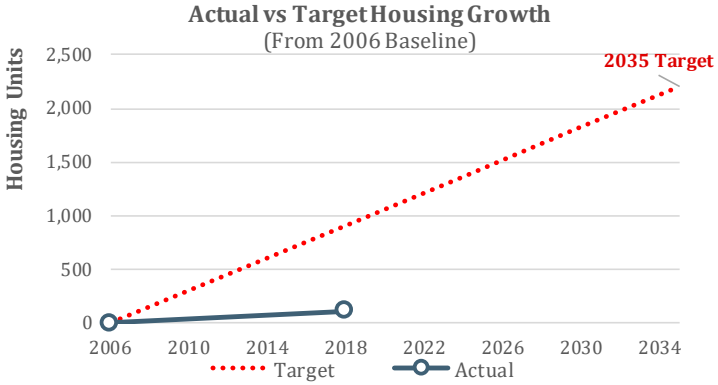



## Beaux Arts - Commercial/Industrial Land Supply and Job Capacity

(no job capacity in Beaux Arts)

# City of Black Diamond

## Housing Growth and Residential Development Trends




| Black Diamond Housing Growth Target: 2006-2035 | 2,204 |
|---|---|
| 2006 Estimated Housing Units | 1,623 |
| 2018 Estimated Housing Units | 1,735 |
| **Estimated Housing Growth** | **112** |
| Remaining 2035 Target | 2,092 |

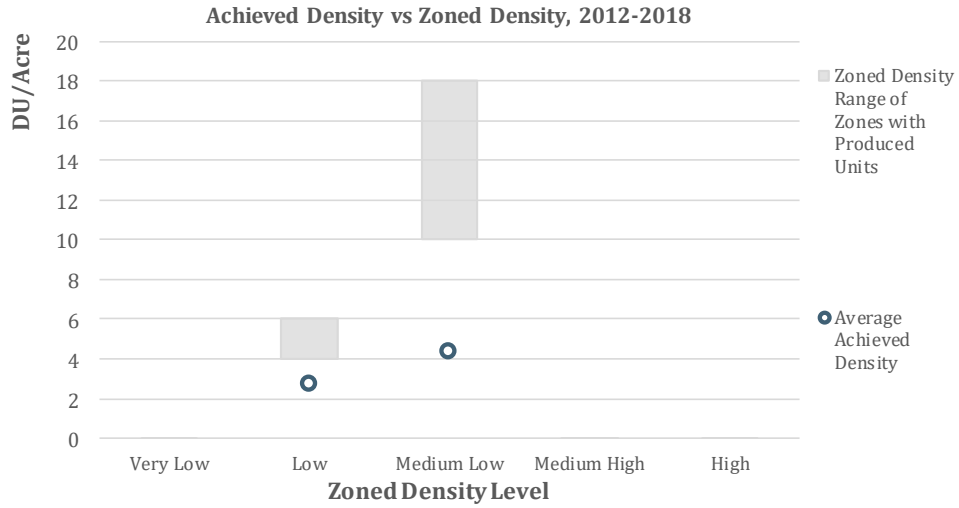
| % of Pace Needed to Achieve 2035 Housing Growth Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| 12.2% | 0.57% | 7.09% |

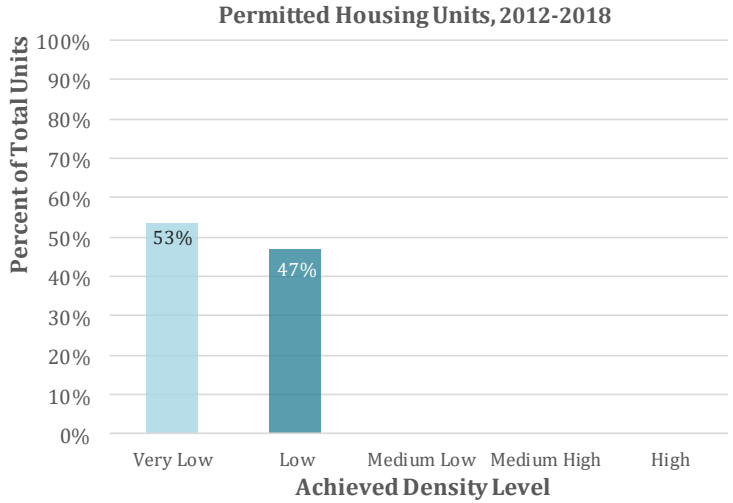
Since 2006, Black Diamond has grown at 12% of the pace needed to achieve its 2035 housing growth target of 2,204 units. During this period, the total number of housing units in Black Diamond grew by roughly 7%. At this current rate, Black Diamond is under the production pace needed to meet its 2035 growth target, and needs to grow at an annual rate of 7.1% to reach its remaining target by 2035.

### Residential Achieved Densities

| Zoned Density (du/acre) | | Gross Area (acres) | Critical Areas (acres) | Public Purpose (acres) | ROWs (acres) | Net Area (acres) | Total Units | Achieved Density (DU/acre) |
|---|---|---|---|---|---|---|---|---|
| Very Low | 0 - 4 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| Low | 4 - 10 du/acre | 23.6 | 1.8 | 0.2 | 0.4 | 21.3 | 57 | **2.7** |
| Medium Low | 10 - 24 du/acre | 16.1 | 0.0 | 1.7 | 7.2 | 7.1 | 31 | **4.4** |
| Medium High | 24 - 48 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| High | 48 & up du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| | **Total** | **39.7** | **1.8** | **1.9** | **7.6** | **28.4** | **88** | **3.1** |

| Achieved Density Level | Net Area (acres) | Total Units |
|---|---|---|
| Very Low | 19.0 | 47 |
| Low | 9.4 | 41 |
| Medium Low | 0.0 | 0 |
| Medium High | 0.0 | 0 |
| High | 0.0 | 0 |
| **Total** | **28.4** | **88** |



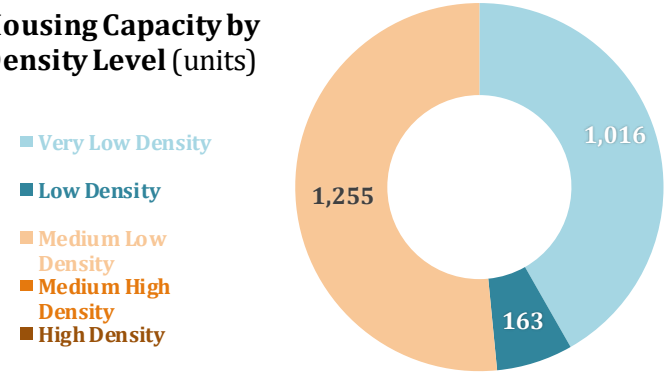



## Black Diamond - Residential Land Supply and Capacity

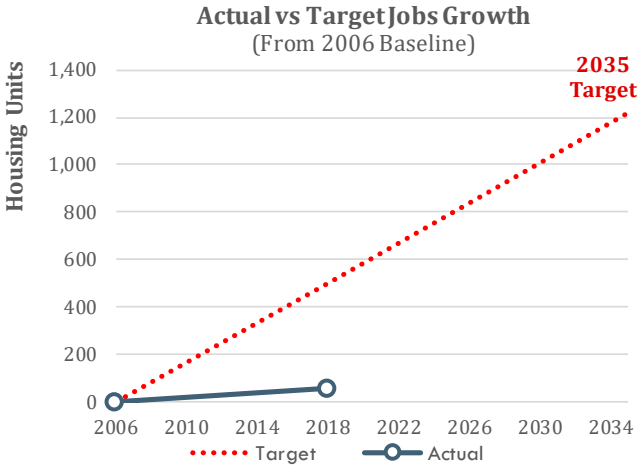
| Assumed Density Level | Vacant/ Redevelopable | Gross Acres | Critical Areas | Infrastructure Constrained Area | ROW & Public Purpose Discount | Market Factor (low/high) | Net Available Acres | Assumed Densities (low/high - units/acre) | Net Capacity (units) |
|---|---|---|---|---|---|---|---|---|---|
| **Very Low Density** | Vacant Subtotal | | | | 67.28 | 10.0% - 50.0% | 235.73 | 2.5 | 577 |
| | Redev Subtotal | | | | 71.55 | 10.0% - 50.0% | 250.78 | 2.5 | 439 |
| | **Subtotal** | 789.70 | 60.18 | 29.14 | 138.82 | | 486.51 | | **1,016** |
| **Low Density** | Vacant Subtotal | | | | 7.00 | 20.0% - 20.0% | 21.00 | 4.5 | 94 |
| | Redev Subtotal | | | | 6.86 | 20.0% - 20.0% | 20.58 | 4.5 | 70 |
| | **Subtotal** | 84.53 | 5.23 | 10.00 | 13.86 | | 41.58 | | **163** |
| **Medium Low Density** | Vacant Subtotal | | | | 8.73 | 25.0% - 50.0% | 54.59 | 10.0 / 12.0 | 637 |
| | Redev Subtotal | | | | 9.48 | 25.0% - 50.0% | 57.57 | 10.0 / 12.0 | 618 |
| | **Subtotal** | 191.07 | 8.98 | 0.00 | 18.21 | | 112.17 | | **1,255** |
| **Medium High Density** | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | | **0** |
| **High Density** | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | | **0** |
| **All Zones** | Vacant Total | | | | 83.01 | | 311.33 | | 1,308 |
| | Redev Total | | | | 87.89 | | 328.93 | | 1,126 |
| | **Total** | **1,065.29** | **74.38** | **39.14** | **170.89** | | **640.26** | | **2,434** |

| Capacity (units) | |
|---|---|
| Very Low Density Zones | 1,016 |
| Low Density Zones | 163 |
| Medium Low Density Zones | 1,255 |
| Medium High Density Zones | 0 |
| High Density Zones | 0 |
| *Capacity in Pipeline* | *6,000* |
| **Total Capacity (Units)** | **8,434** |
| Remaining Target (2018-2035) | 2,092 |
| **Surplus/Deficit Capacity (Units)** | **6,342** |

**Housing Capacity by Density Level** (units)



# Black Diamond - Employment Growth and Commercial/Industrial Development Trends




| Black Diamond Jobs Growth Target: 2006-2035 | 1,218 |
|---|---|
| 2006 Jobs (PSRC) | 458 |
| 2018 Jobs (PSRC) | 515 |
| **Total Jobs Growth** | **57** |
| **Remaining 2035 Target** | **1,161** |

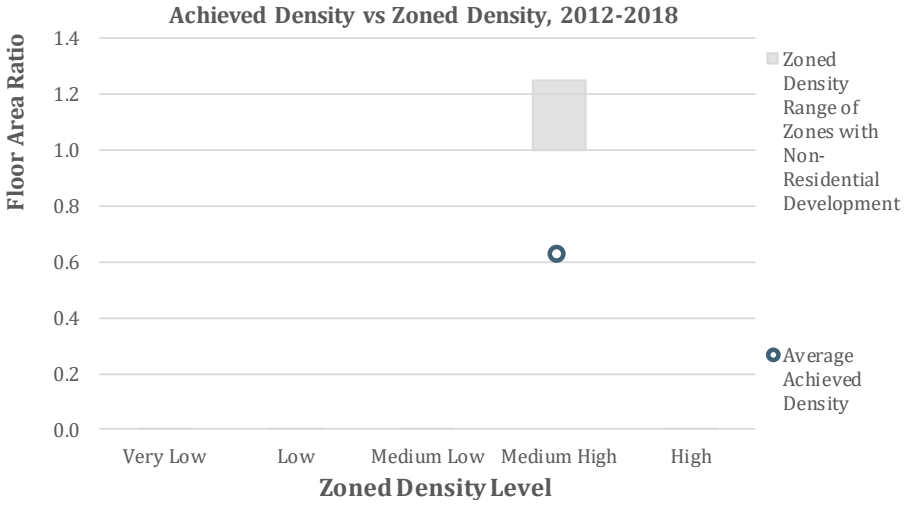
| % of Pace Needed to Achieve 2035 Jobs Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| **11.3%** | **1.04%** | **13.26%** |

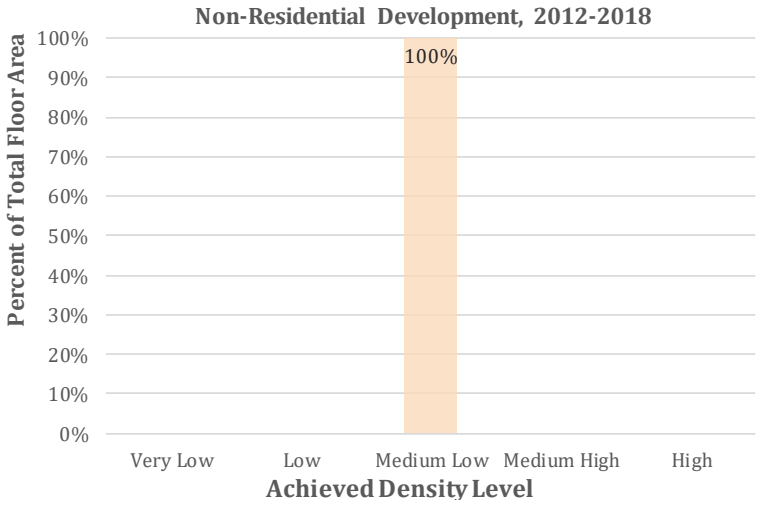
Since 2006, Black Diamond has grown at 11% of the pace needed to achieve its 2035 jobs growth target of 1,218 units. During this period, the total number of jobs in Black Diamond grew by roughly 12%. At this current rate, Black Diamond is under the pace needed to meet its 2035 jobs growth target, and needs to grow at an annual rate of 13.3% to reach its remaining target by 2035.

## Non-Residential Achieved Densities

| Zoned Density (FAR) | | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|---|
| **Very Low** | 0 - 0.35 FAR | 0 | 0 | |
| **Low** | 0.35 - 0.5 FAR | 0 | 0 | |
| **Medium Low** | 0.5 - 1.0 FAR | 0 | 0 | |
| **Medium High** | 1.0 - 3.0 FAR | 84,071 | 52,231 | **0.6** |
| **High** | 3.0 & up FAR | 0 | 0 | |
| | **Total** | **84,071** | **52,231** | **0.6** |

| Achieved Density Level | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|
| **Very Low** | 0 | 0 | **0.0** |
| **Low** | 0 | 0 | **0.0** |
| **Medium Low** | 84,071 | 52,231 | **0.6** |
| **Medium High** | 0 | 0 | **0.0** |
| **High** | 0 | 0 | **0.0** |
| **Total** | **84,071** | **52,231** | **0.6** |



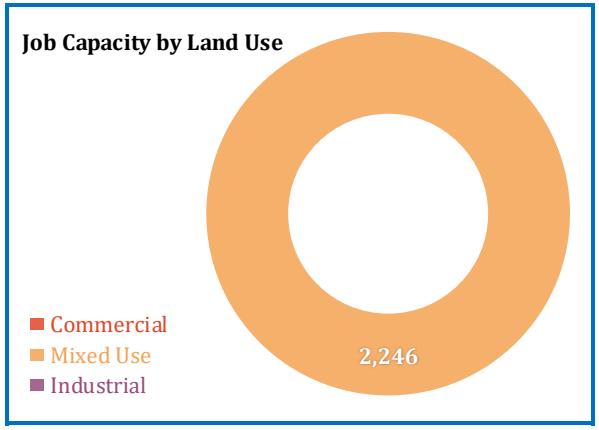
## Black Diamond - Commercial/Industrial Land Supply and Job Capacity

| Land Supply | Gross Area (acres) | Critical Areas (acres) | ROWs (acres) | Public Purpose (acres) | Initial Land Supply | Market Factor | Buildable Area (acres) |
|---|---|---|---|---|---|---|---|
| **Vacant / Redev.** | | | | | | | |
| Commercial | 2.4 | 2.4 | 0.0 | 0.0 | 0.0 | 0% | 0.0 |
| Mixed Use | 156.3 | 6.2 | 7.5 | 7.5 | 135.1 | 25% - 50% | 90.5 |
| Industrial | 70.7 | 0.0 | 3.5 | 3.5 | 63.6 | 70% | 14.1 |
| **Non-Res Land Total** | **229.4** | **8.6** | **11.0** | **22.3** | **401.1** | | **104.6** |

| Job Capacity by Land Use | Net Buildable Area (mil.sq.ft.) | Assumed Density Range (FAR) | Existing Floor Area (million sq.ft.) | Floor Area Capac. (million sq.ft.) | Sq. ft. per Job | Job Capacity |
|---|---|---|---|---|---|---|
| **Commercial*** | | | | | | |
| Vacant | 1.69 | 0.00 | 0.00 | 0.00 | 1,000 | 0 |
| Redevelopable | 0.27 | 0.00 | 0.00 | 0.00 | 1,000 | 0 |
| **Commercial Total** | **1.96** | **0.00** | **0.00** | **0.00** | **1,000** | **0** |
| **Mixed-Use** | | | | | | |
| Vacant | 2.07 | 0.20 / 0.40 | 0.00 | 0.79 | 600 / 860 | 1,310 |
| Redevelopable | 1.87 | 0.20 / 0.40 | 0.13 | 0.56 | 600 / 860 | 936 |
| **Mixed Use Total** | **3.94** | **0.20 / 0.40** | **0.13** | **1.35** | **600 / 860** | **2,246** |
| **Industrial** | | | | | | |
| Vacant | 0.62 | 0.00 | 0.00 | 0.00 | 1,000 | 0 |
| Redevelopable | 0.00 | 0.00 | 0.00 | 0.00 | 1,000 | 0 |
| **Industrial Total** | **0.62** | **0.00** | **0.00** | **0.00** | **1,000** | **0** |
| **City Total** | | | | | | |
| Commercial | 1.96 | 0.00 | 0.69 | 0.00 | 1,000 | 0 |
| Mixed Use | 3.94 | 0.20 / 0.40 | 0.91 | 1.35 | 600 / 860 | 2,246 |
| Industrial | 0.62 | 0.00 | 0.26 | 0.00 | 1,000 | 0 |
| *Job Capacity in Pipeline* | | | | | | *942* |
| **City Total** | **6.52** | **0.40** | **1.86** | **1.35** | **600 / 1000** | **3,188** |

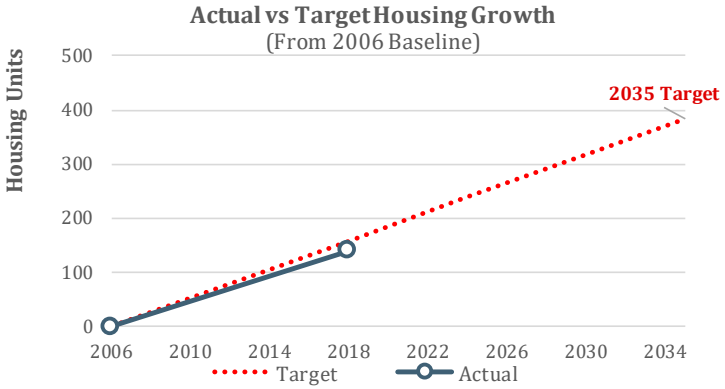
*Certain zones grouped as commercial allow for industrial use.

| Job Capacity by Assumed Density Level | # | % |
|---|---|---|
| Very Low Density | 67 | 3% |
| Low Density | 2,179 | 97% |
| Medium Low Density | 0 | 0% |
| Medium High Density | 0 | 0% |
| High Density | 0 | 0% |
| | | |
| *Capacity in Pipeline* | | *942* |
| **Total Capacity (jobs)** | | **3,188** |
| Remaining Target (2018-2035) | | 1,161 |
| **Surplus/Deficit Capacity (jobs)** | | **2,027** |



# City of Carnation

## Housing Growth and Residential Development Trends




| Carnation Housing Growth Target: 2006-2035 | 383 |
|---|---|
| 2006 Estimated Housing Units | 739 |
| 2018 Estimated Housing Units | 880 |
| **Estimated Housing Growth** | **141** |
| Remaining 2035 Target | 242 |

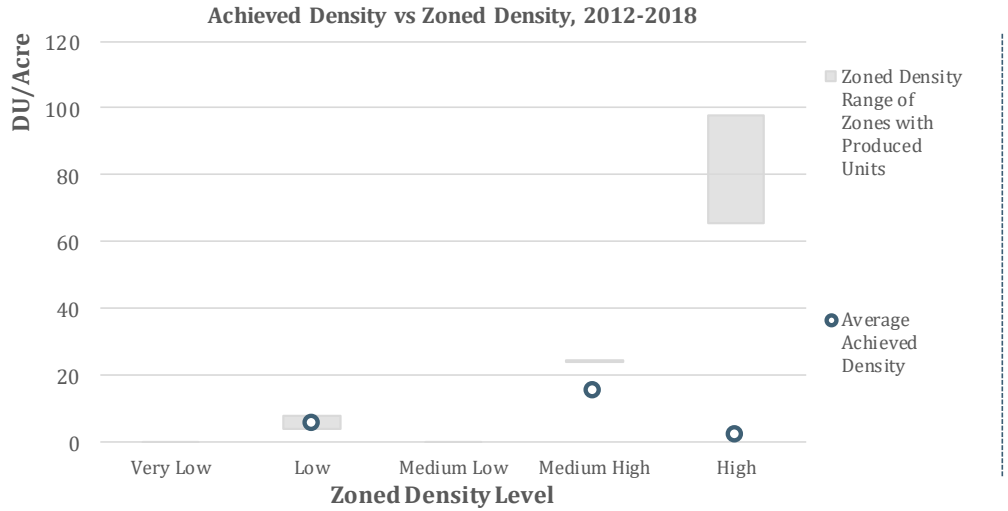
| % of Pace Needed to Achieve 2035 Housing Growth Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| 88.7% | 1.58% | 1.62% |

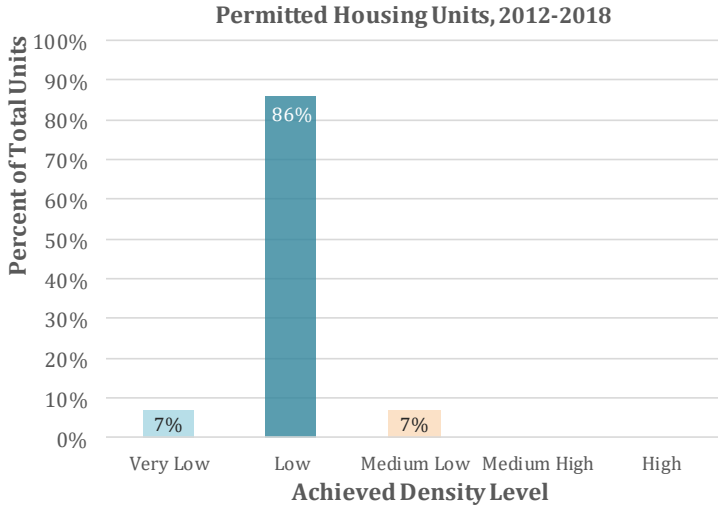
Since 2006, Carnation has grown at 89% of the pace needed to achieve its 2035 housing growth target of 383 units. During this period, the total number of housing units in Carnation grew by roughly 19%. At this current rate, Carnation is under the production pace needed to meet its 2035 growth target, and needs to grow at an annual rate of 1.6% to reach its remaining target by 2035.

### Residential Achieved Densities

| Zoned Density (du/acre) | | Gross Area (acres) | Critical Areas (acres) | Public Purpose (acres) | ROWs (acres) | Net Area (acres) | Total Units | Achieved Density (DU/acre) |
|---|---|---|---|---|---|---|---|---|
| Very Low | 0 - 4 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| Low | 4 - 10 du/acre | 29.7 | 0.1 | 0.0 | 0.0 | 29.6 | 156 | 5.3 |
| Medium Low | 10 - 24 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| Medium High | 24 - 48 du/acre | 0.9 | 0.0 | 0.0 | 0.0 | 0.9 | 14 | 15.0 |
| High | 48 & up du/acre | 4.3 | 3.7 | 0.0 | 0.0 | 0.5 | 1 | 1.9 |
| | Total | 34.9 | 3.9 | 0.0 | 0.0 | 31.0 | 171 | 5.5 |

| Achieved Density Level | Net Area (acres) | Total Units |
|---|---|---|
| Very Low | 3.4 | 12 |
| Low | 26.9 | 147 |
| Medium Low | 0.7 | 12 |
| Medium High | 0.0 | 0 |
| High | 0.0 | 0 |
| Total | 31.0 | 171 |



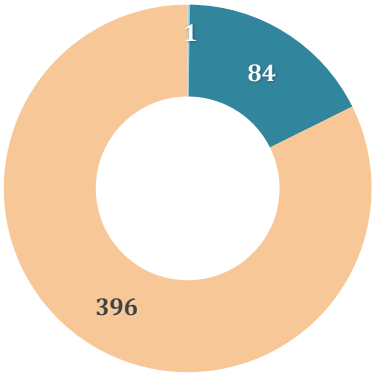



## Carnation - Residential Land Supply and Capacity

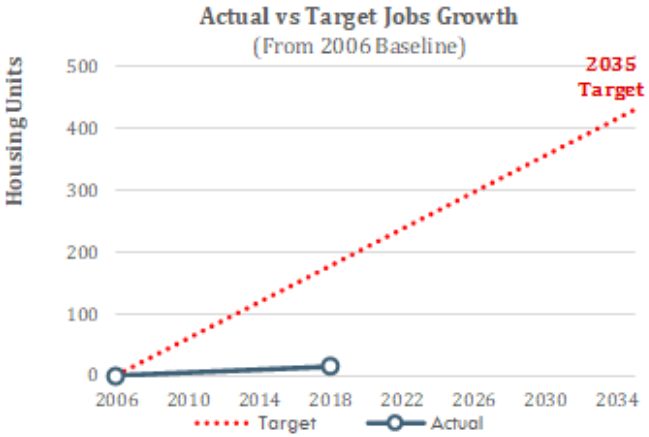
| Assumed Density Level | Vacant/ Redevelopable | Gross Acres | Critical Areas | Infrastructure Constrained Area | ROW & Public Purpose Discount | Market Factor (low/high) | Net Available Acres | Assumed Densities (low/high - units/acre) | Net Capacity (units) |
|---|---|---|---|---|---|---|---|---|---|
| Very Low Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 3.9 | 0 |
| | Redev Subtotal | | | | 1.39 | 0.0% - 0.0% | 3.23 | 3.9 | 1 |
| | **Subtotal** | 98.76 | 87.36 | 6.78 | 1.39 | | 3.23 | | **1** |
| Low Density | Vacant Subtotal | | | | 0.90 | 0.0% - 0.0% | 2.10 | 5.2 / 9.7 | 13 |
| | Redev Subtotal | | | | 4.21 | 0.0% - 0.0% | 11.39 | 5.2 / 9.7 | 72 |
| | **Subtotal** | 38.77 | 20.03 | 0.23 | 5.11 | | 13.49 | | **84** |
| Medium Low Density | Vacant Subtotal | | | | 0.84 | 0.0% - 0.0% | 2.96 | 12.0 / 17.0 | 49 |
| | Redev Subtotal | | | | 7.87 | 0.0% - 0.0% | 26.13 | 12.0 / 17.0 | 347 |
| | **Subtotal** | 30.25 | 13.55 | 0.00 | 8.71 | | 29.09 | | **396** |
| Medium High Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | | **0** |
| High Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | | **0** |
| All Zones | Vacant Total | | | | 1.74 | | 5.06 | | 62 |
| | Redev Total | | | | 13.47 | | 40.75 | | 420 |
| | **Total** | **167.78** | **120.95** | **7.01** | **15.20** | | **45.82** | | **481** |

| Capacity (units) | |
|---|---|
| Very Low Density Zones | 1 |
| Low Density Zones | 84 |
| Medium Low Density Zones | 396 |
| Medium High Density Zones | 0 |
| High Density Zones | 0 |
| *Capacity in Pipeline* | *223* |
| **Total Capacity (Units)** | **704** |
| Remaining Target (2018-2035) | 242 |
| **Surplus/Deficit Capacity (Units)** | **462** |

**Housing Capacity by Density Level** (units)



## Carnation - Employment Growth and Commercial/Industrial Development Trends




| Carnation Jobs Growth Target: 2006-2035 | 429 |
|---|---|
| 2006 Jobs (PSRC) | 871 |
| 2018 Jobs (PSRC) | 886 |
| **Total Jobs Growth** | **15** |
| Remaining 2035 Target | 414 |

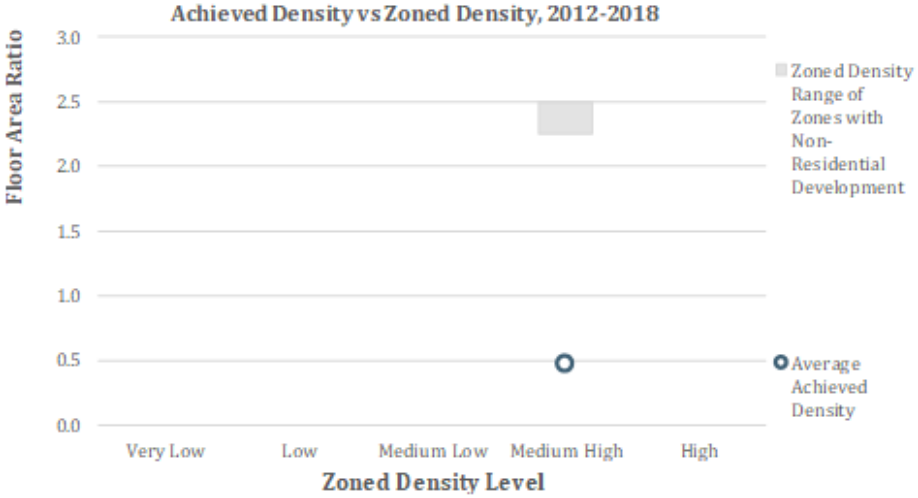
| % of Pace Needed to Achieve 2035 Jobs Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| 8.4% | 0.14% | 2.75% |

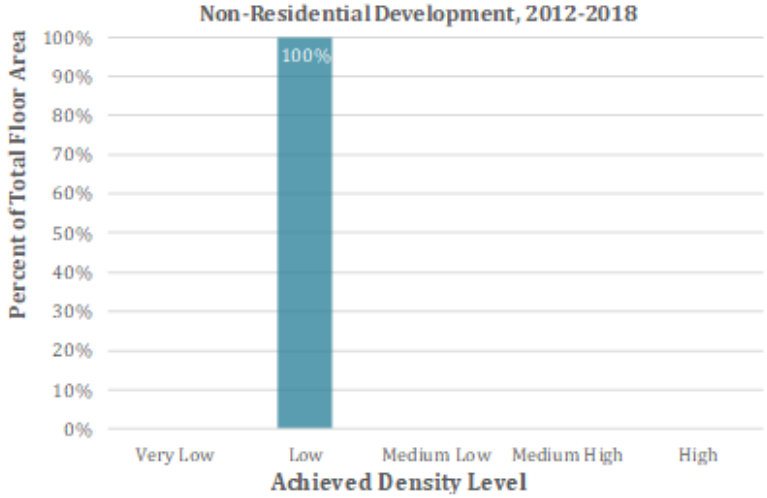
Since 2006, Carnation has grown at 8% of the pace needed to achieve its 2035 jobs growth target of 429 units. During this period, the total number of jobs in Carnation grew by roughly 2%. At this current rate, Carnation is under the pace needed to meet its 2035 jobs growth target, and needs to grow at an annual rate of 2.7% to reach its remaining target by 2035.

### Non-Residential Achieved Densities

| Zoned Density (FAR) | | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|---|
| Very Low | 0 - 0.35 FAR | 0 | 0 | |
| Low | 0.35 - 0.5 FAR | 0 | 0 | |
| Medium Low | 0.5 - 1.0 FAR | 0 | 0 | |
| Medium High | 1.0 - 3.0 FAR | 2,387 | 1,152 | 0.5 |
| High | 3.0 & up FAR | 0 | 0 | |
| | Total | 2,387 | 1,152 | 0.5 |

| Achieved Density Level | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|
| Very Low | 0 | 0 | 0.0 |
| Low | 2,387 | 1,152 | 0.5 |
| Medium Low | 0 | 0 | 0.0 |
| Medium High | 0 | 0 | 0.0 |
| High | 0 | 0 | 0.0 |
| Total | 2,387 | 1,152 | 0.5 |



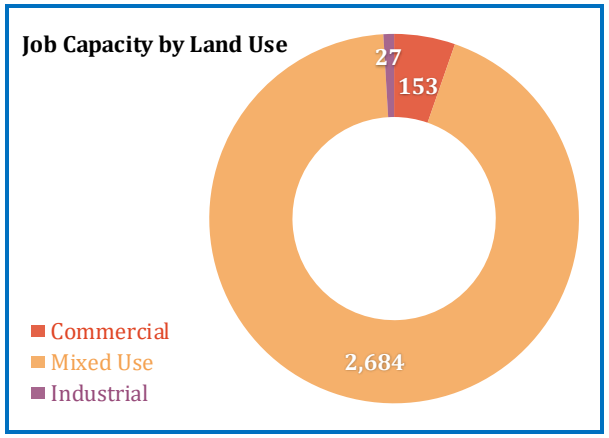



# Carnation - Commercial/Industrial Land Supply and Job Capacity

| Land Supply | Gross Area (acres) | Critical Areas (acres) | ROWs (acres) | Public Purpose (acres) | Initial Land Supply | Market Factor | Buildable Area (acres) |
|---|---|---|---|---|---|---|---|
| **Vacant / Redev.** | | | | | | | |
| Commercial | 0.6 | 0.0 | 0.1 | 0.1 | 0.5 | 0% | 0.5 |
| Mixed Use | 73.3 | 61.6 | 1.4 | 1.2 | 9.1 | 0% | 9.1 |
| Industrial | 17.9 | 16.6 | 0.2 | 0.1 | 1.0 | 0% | 1.0 |
| **Non-Res Land Total** | **91.8** | **78.2** | **1.6** | **1.4** | **10.6** | | **10.6** |

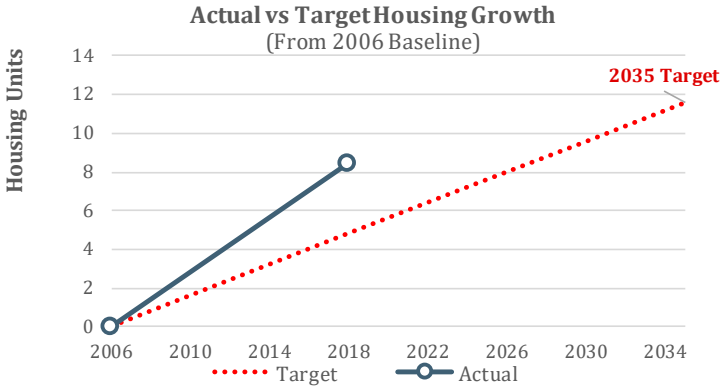
| Job Capacity by Land Use | Net Buildable Area (mil.sq.ft.) | Assumed Density Range (FAR) | Existing Floor Area (million sq.ft.) | Floor Area Capac. (million sq.ft.) | Sq. ft. per Job | Job Capacity |
|---|---|---|---|---|---|---|
| **Commercial** | | | | | | |
| Vacant | 0.00 | 2.25 | 0.00 | 0.00 | 300 | 0 |
| Redevelopable | 0.02 | 2.25 | 0.00 | 0.05 | 300 | 153 |
| **Commercial Total** | **0.02** | **2.25** | **0.00** | **0.05** | **300** | **153** |
| **Mixed-Use** | | | | | | |
| Vacant | 0.13 | 1.50 / 3.00 | 0.00 | 0.33 | 300 / 1000 | 883 |
| Redevelopable | 0.27 | 1.50 / 3.00 | 0.02 | 0.67 | 300 / 1000 | 1801 |
| **Mixed Use Total** | **0.40** | **1.50 / 3.00** | **0.02** | **1.00** | **300 / 1000** | **2,684** |
| **Industrial** | | | | | | |
| Vacant | 0.00 | 0.48 | 0.00 | 0.00 | 800 | 0 |
| Redevelopable | 0.04 | 0.48 | 0.00 | 0.02 | 800 | 27 |
| **Industrial Total** | **0.04** | **0.48** | **0.00** | **0.02** | **800** | **27** |
| **City Total** | | | | | | |
| Commercial | 0.02 | 2.25 | 0.69 | 0.05 | 300 | 153 |
| Mixed Use | 0.40 | 1.50 / 3.00 | 0.91 | 1.00 | 300 / 1000 | 2,684 |
| Industrial | 0.04 | 0.48 | 0.26 | 0.02 | 800 | 27 |
| *Job Capacity in Pipeline* | | | | | | *0* |
| **City Total** | **0.46** | **0.48 / 3.00** | **1.86** | **1.07** | **300 / 1000** | **2,864** |

| Job Capacity by Assumed Density Level | # | % |
|---|---|---|
| Very Low Density | 0 | 0% |
| Low Density | 27 | 1% |
| Medium Low Density | 0 | 0% |
| Medium High Density | 2,090 | 73% |
| High Density | 747 | 26% |
| | | |
| *Capacity in Pipeline* | | *0* |
| **Total Capacity (jobs)** | | **2,864** |
| Remaining Target (2018-2035) | | 414 |
| **Surplus/Deficit Capacity (jobs)** | | **2,450** |



# City of Clyde Hill

## Housing Growth and Residential Development Trends




| Clyde Hill Housing Growth Target: 2006-2035 | 12 |
|---|---|
| 2006 Estimated Housing Units | 1,083 |
| 2018 Estimated Housing Units | 1,091 |
| **Estimated Housing Growth** | **8** |
| Remaining 2035 Target | 3 |

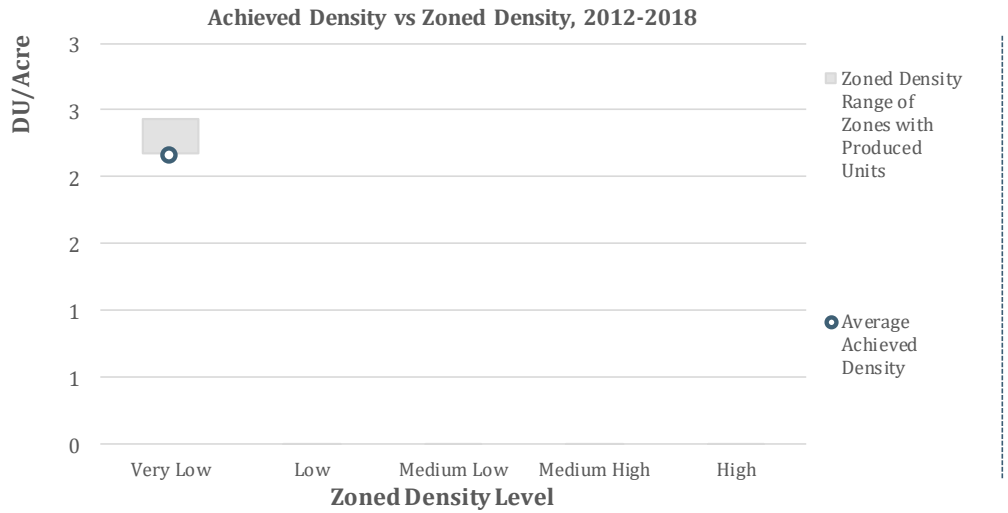
| % of Pace Needed to Achieve 2035 Housing Growth Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| 175.6% | 0.06% | 0.02% |

Since 2006, Clyde Hill has grown at 176% of the pace needed to achieve its 2035 housing growth target of 12 units. During this period, the total number of housing units in Clyde Hill grew by roughly 1%. At this current rate, Clyde Hill is over the production pace needed to meet its 2035 growth target, and needs to grow at an annual rate of 0% to reach its remaining target by 2035.

### Residential Achieved Densities

| Zoned Density (du/acre) | | Gross Area (acres) | Critical Areas (acres) | Public Purpose (acres) | ROWs (acres) | Net Area (acres) | Total Units | Achieved Density (DU/acre) |
|---|---|---|---|---|---|---|---|---|
| Very Low | 0 - 4 du/acre | 2.8 | 0.0 | 0.0 | 0.0 | 2.8 | 6 | 2.2 |
| Low | 4 - 10 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| Medium Low | 10 - 24 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| Medium High | 24 - 48 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| High | 48 & up du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| | Total | 2.8 | 0.0 | 0.0 | 0.0 | 2.8 | 6 | 2.2 |

| Achieved Density Level | Net Area (acres) | Total Units |
|---|---|---|
| Very Low | 2.8 | 6 |
| Low | 0.0 | 0 |
| Medium Low | 0.0 | 0 |
| Medium High | 0.0 | 0 |
| High | 0.0 | 0 |
| Total | 2.8 | 6 |

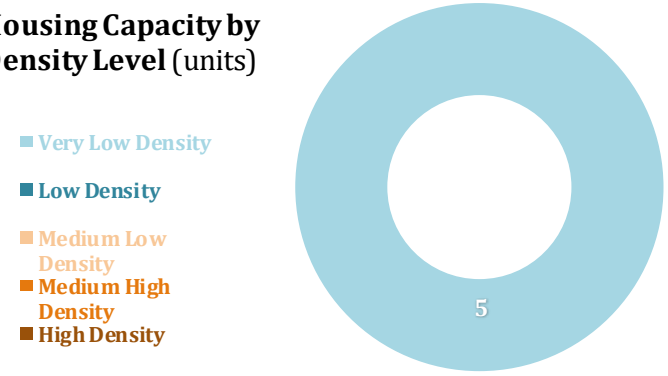


## Clyde Hill - Residential Land Supply and Capacity

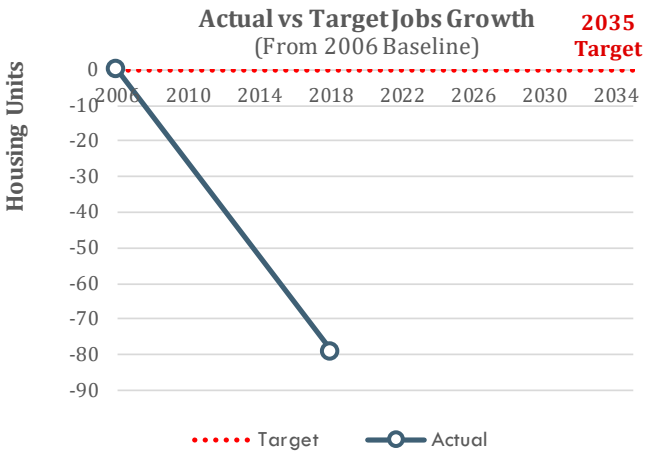
| Assumed Density Level | Vacant/ Redevelopable | Gross Acres | Critical Areas | Infrastructure Constrained Area | ROW & Public Purpose Discount | Market Factor (low/high) | Net Available Acres | Assumed Densities (low/high - units/acre) | Net Capacity (units) |
|---|---|---|---|---|---|---|---|---|---|
| Very Low Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.76 | 2.2 | 2 |
| | Redev Subtotal | | | | 0.00 | 0.0% - 0.0% | 1.83 | 2.2 | 3 |
| | **Subtotal** | 479.48 | 0.00 | 0.00 | 0.00 | | 2.59 | | **5** |
| Low Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | | **0** |
| Medium Low Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | | **0** |
| Medium High Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | | **0** |
| High Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | | **0** |
| All Zones | Vacant Total | | | | 0.00 | | 0.76 | | 2 |
| | Redev Total | | | | 0.00 | | 1.83 | | 3 |
| | **Total** | **479.48** | **0.00** | **0.00** | **0.00** | | **2.59** | | **5** |

| Capacity (units) | |
|---|---|
| Very Low Density Zones | 5 |
| Low Density Zones | 0 |
| Medium Low Density Zones | 0 |
| Medium High Density Zones | 0 |
| High Density Zones | 0 |
| *Capacity in Pipeline* | *0* |
| **Total Capacity (Units)** | **5** |
| Remaining Target (2018-2035) | 3 |
| **Surplus/Deficit Capacity (Units)** | **1** |

**Housing Capacity by Density Level** (units)



# Clyde Hill - Employment Growth and Commercial/Industrial Development Trends




| Clyde Hill Jobs Growth Target: 2006-2035 | 0 |
|---|---|
| 2006 Jobs (PSRC) | 713 |
| 2018 Jobs (PSRC) | 634 |
| **Total Jobs Growth** | **-79** |
| Remaining 2035 Target | 79 |

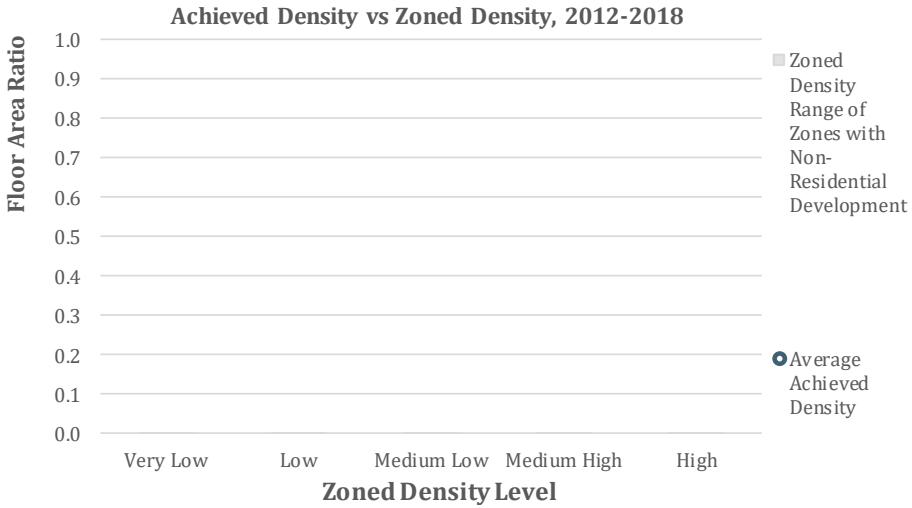
| % of Pace Needed to Achieve 2035 Jobs Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| **Not Applicable** | **-0.92%** | **Not Applicable** |

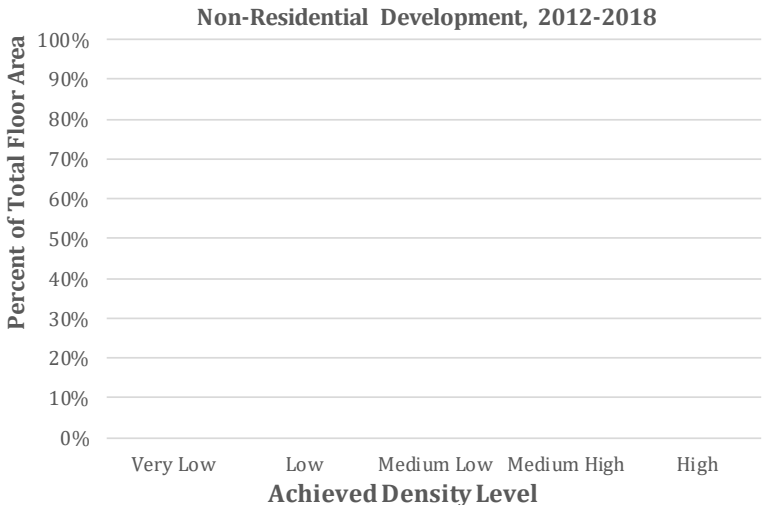
Since 2006, the total number of jobs in Clyde Hill grew by roughly -1%. There is no 2035 jobs growth target.

## Non-Residential Achieved Densities

| Zoned Density (FAR) | | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|---|
| **Very Low** | 0 - 0.35 FAR | 0 | 0 | |
| **Low** | 0.35 - 0.5 FAR | 0 | 0 | |
| **Medium Low** | 0.5 - 1.0 FAR | 0 | 0 | |
| **Medium High** | 1.0 - 3.0 FAR | 0 | 0 | |
| **High** | 3.0 & up FAR | 0 | 0 | |
| | **Total** | **0** | **0** | |

| Achieved Density Level | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|
| **Very Low** | 0 | 0 | **0.0** |
| **Low** | 0 | 0 | **0.0** |
| **Medium Low** | 0 | 0 | **0.0** |
| **Medium High** | 0 | 0 | **0.0** |
| **High** | 0 | 0 | **0.0** |
| **Total** | **0** | **0** | **0.0** |



## Clyde Hill - Commercial/Industrial Land Supply and Job Capacity

| Land Supply | Gross Area (acres) | Critical Areas (acres) | ROWs (acres) | Public Purpose (acres) | Initial Land Supply | Market Factor | Buildable Area (acres) |
|---|---|---|---|---|---|---|---|
| **Vacant / Redev.** | | | | | | | |
| Commercial | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0% | 0.0 |
| Mixed Use | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0% | 0.0 |
| Industrial | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0% | 0.0 |
| **Non-Res Land Total** | **0.0** | **0.0** | **0.0** | **0.0** | **0.0** | | **0.0** |

| Job Capacity by Land Use | Net Buildable Area (mil.sq.ft.) | Assumed Density Range (FAR) | Existing Floor Area (million sq.ft.) | Floor Area Capac. (million sq.ft.) | Sq. ft. per Job | Job Capacity |
|---|---|---|---|---|---|---|
| **Commercial** | | | | | | |
| Vacant | 0.00 | 1.20 | 0.00 | 0.00 | 300 | 0 |
| Redevelopable | 0.00 | 1.20 | 0.00 | 0.00 | 300 | 0 |
| **Commercial Total** | **0.00** | **1.20** | **0.00** | **0.00** | **300** | **0** |
| **Mixed-Use** | | | | | | |
| Vacant | 0.00 | 0.00 | 0.00 | 0.00 | 0 | 0 |
| Redevelopable | 0.00 | 0.00 | 0.00 | 0.00 | 0 | 0 |
| **Mixed Use Total** | **0.00** | **0.00** | **0.00** | **0.00** | **0** | **0** |
| **Industrial** | | | | | | |
| Vacant | 0.00 | 0.00 | 0.00 | 0.00 | 0 | 0 |
| Redevelopable | 0.00 | 0.00 | 0.00 | 0.00 | 0 | 0 |
| **Industrial Total** | **0.00** | **0.00** | **0.00** | **0.00** | **0** | **0** |
| **City Total** | | | | | | |
| Commercial | 0.00 | 1.20 | 0.69 | 0.00 | 300 | 0 |
| Mixed Use | 0.00 | 0.00 | 0.91 | 0.00 | 0 | 0 |
| Industrial | 0.00 | 0.00 | 0.26 | 0.00 | 0 | 0 |
| *Job Capacity in Pipeline* | | | | | | *28* |
| **City Total** | **0.00** | **1.20** | **1.86** | **0.00** | **0 / 300** | **28** |

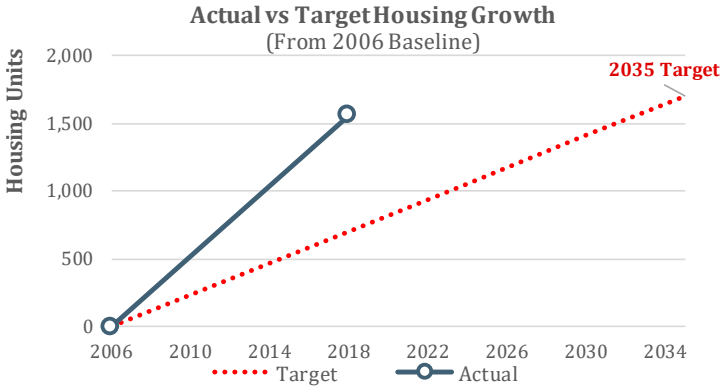
| Job Capacity by Assumed Density Level | # | % |
|---|---|---|
| Very Low Density | 0 | |
| Low Density | 0 | |
| Medium Low Density | 0 | |
| Medium High Density | 0 | |
| High Density | 0 | |
| | | |
| *Capacity in Pipeline* | | *28* |
| **Total Capacity (jobs)** | | **28** |
| Remaining Target (2018-2035) | | 79 |
| **Surplus/Deficit Capacity (jobs)** | | **-51** |

**Job Capacity by Land Use**

- Commercial
- Mixed Use
- Industrial

# City of Covington

## Housing Growth and Residential Development Trends




| Covington Housing Growth Target: 2006-2035 | 1,705 |
|---|---|
| 2006 Estimated Housing Units | 5,470 |
| 2018 Estimated Housing Units | 7,034 |
| **Estimated Housing Growth** | **1,564** |
| Remaining 2035 Target | 141 |

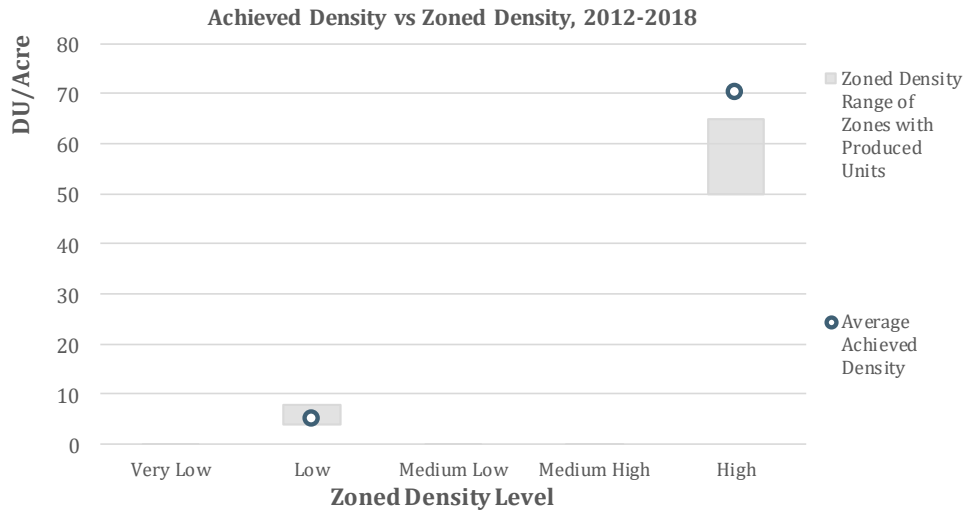
| % of Pace Needed to Achieve 2035 Housing Growth Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| 221.7% | 2.38% | 0.12% |

Since 2006, Covington has grown at 222% of the pace needed to achieve its 2035 housing growth target of 1,705 units. During this period, the total number of housing units in Covington grew by roughly 29%. At this current rate, Covington is over the production pace needed to meet its 2035 growth target, and needs to grow at an annual rate of 0.1% to reach its remaining target by 2035.

### Residential Achieved Densities

| Zoned Density (du/acre) | | Gross Area (acres) | Critical Areas (acres) | Public Purpose (acres) | ROWs (acres) | Net Area (acres) | Total Units | Achieved Density (DU/acre) |
|---|---|---|---|---|---|---|---|---|
| Very Low | 0 - 4 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| Low | 4 - 10 du/acre | 135.8 | 11.7 | 13.1 | 9.2 | 101.8 | 493 | **4.8** |
| Medium Low | 10 - 24 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| Medium High | 24 - 48 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| High | 48 & up du/acre | 7.0 | 0.0 | 0.7 | 1.2 | 5.1 | 356 | **69.9** |
| | **Total** | **142.9** | **11.7** | **13.8** | **10.4** | **106.9** | **849** | **7.9** |

| Achieved Density Level | Net Area (acres) | Total Units |
|---|---|---|
| Very Low | 0.0 | 0 |
| Low | 101.8 | 493 |
| Medium Low | 0.0 | 0 |
| Medium High | 0.0 | 0 |
| High | 5.1 | 356 |
| **Total** | **106.9** | **849** |

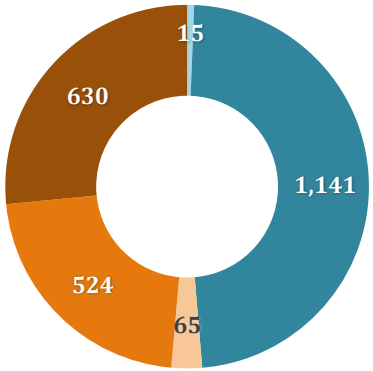


## Covington - Residential Land Supply and Capacity

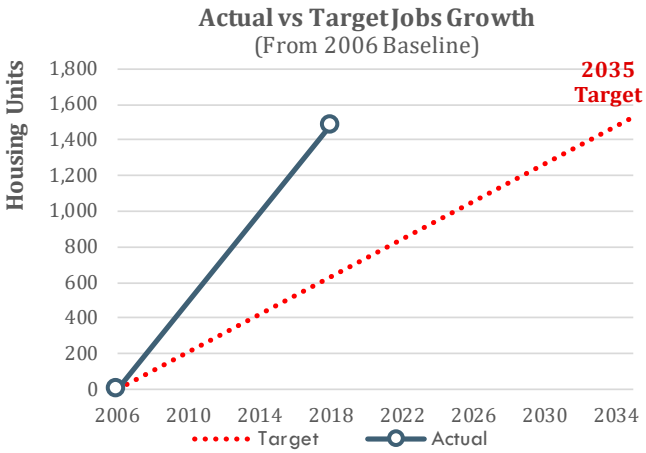
| Assumed Density Level | Vacant/ Redevelopable | Gross Acres | Critical Areas | Infrastructure Constrained Area | ROW & Public Purpose Discount | Market Factor (low/high) | Net Available Acres | Assumed Densities (low/high - units/acre) | Net Capacity (units) |
|---|---|---|---|---|---|---|---|---|---|
| Very Low Density | Vacant Subtotal | | | | 2.38 | 10.0% - 10.0% | 9.52 | 1.0 | 8 |
| | Redev Subtotal | | | | 3.84 | 10.0% - 10.0% | 15.34 | 1.0 | 6 |
| | **Subtotal** | 48.67 | 17.59 | 0.00 | 6.22 | | 24.87 | | **15** |
| Low Density | Vacant Subtotal | | | | 22.46 | 1.0% - 5.0% | 89.85 | 4.1 / 5.5 | 424 |
| | Redev Subtotal | | | | 57.45 | 1.0% - 5.0% | 229.79 | 4.1 / 5.5 | 717 |
| | **Subtotal** | 500.85 | 101.31 | 0.00 | 79.91 | | 319.64 | | **1,141** |
| Medium Low Density | Vacant Subtotal | | | | 0.00 | 0.0% - 30.0% | 0.00 | 12.0 / 18.0 | 0 |
| | Redev Subtotal | | | | 1.51 | 0.0% - 30.0% | 8.55 | 12.0 / 18.0 | 65 |
| | **Subtotal** | 18.19 | 8.13 | 0.00 | 1.51 | | 8.55 | | **65** |
| Medium High Density | Vacant Subtotal | | | | 1.50 | 10.0% - 25.0% | 2.55 | 24.0 / 42.0 | 76 |
| | Redev Subtotal | | | | 17.14 | 10.0% - 25.0% | 29.14 | 24.0 / 42.0 | 448 |
| | **Subtotal** | 159.96 | 35.66 | 0.00 | 18.64 | | 31.70 | | **524** |
| High Density | Vacant Subtotal | | | | 0.76 | 20.0% - 20.0% | 1.29 | 64.0 | 63 |
| | Redev Subtotal | | | | 6.95 | 20.0% - 20.0% | 11.81 | 64.0 | 567 |
| | **Subtotal** | 53.27 | 1.88 | 0.00 | 7.71 | | 13.11 | | **630** |
| All Zones | Vacant Total | | | | 27.11 | | 103.22 | | 571 |
| | Redev Total | | | | 86.88 | | 294.64 | | 1,804 |
| | **Total** | **780.95** | **164.57** | **0.00** | **113.99** | | **397.86** | | **2,375** |

| Capacity (units) | |
|---|---|
| Very Low Density Zones | 15 |
| Low Density Zones | 1,141 |
| Medium Low Density Zones | 65 |
| Medium High Density Zones | 524 |
| High Density Zones | 630 |
| *Capacity in Pipeline* | *2,234* |
| | |
| **Total Capacity (Units)** | **4,609** |
| Remaining Target (2018-2035) | 141 |
| **Surplus/Deficit Capacity (Units)** | **4,468** |

**Housing Capacity by Density Level** (units)



# Covington - Employment Growth and Commercial/Industrial Development Trends




| Covington Jobs Growth Target: 2006-2035 | 1,531 |
|---|---|
| 2006 Jobs (PSRC) | 3,528 |
| 2018 Jobs (PSRC) | 5,013 |
| **Total Jobs Growth** | **1,485** |
| Remaining 2035 Target | 46 |

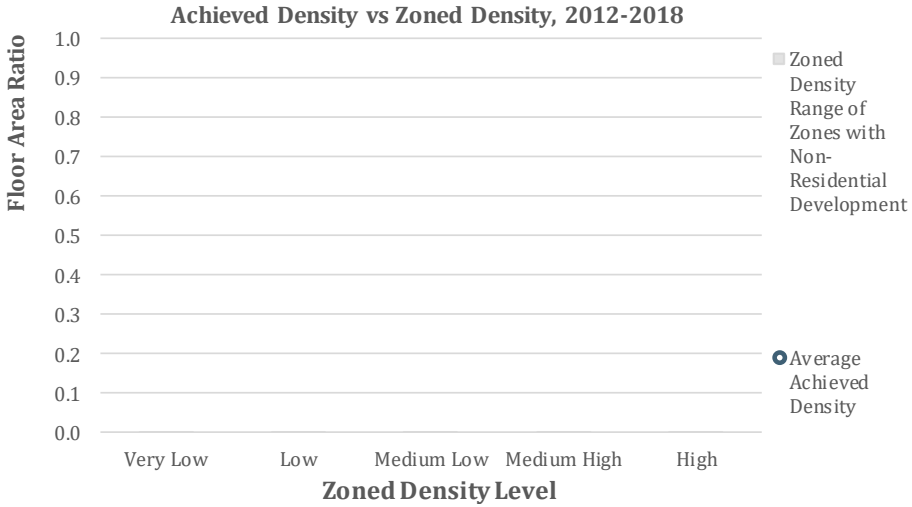
| % of Pace Needed to Achieve 2035 Jobs Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| 234.4% | 3.51% | 0.05% |

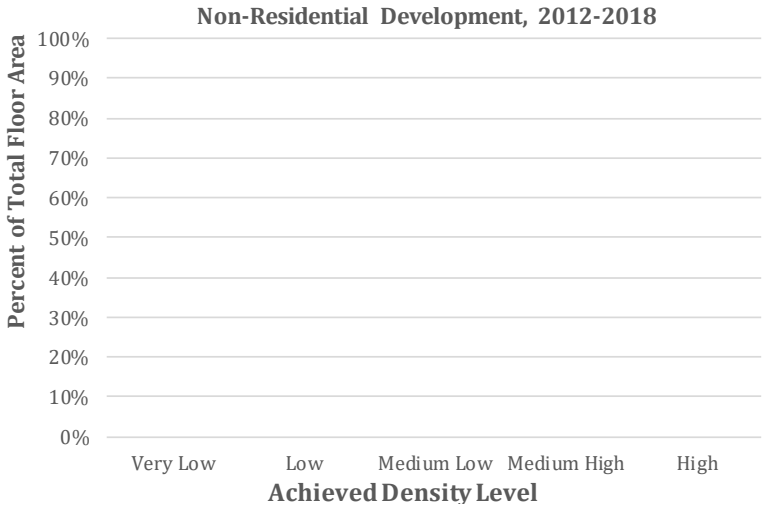
Since 2006, Covington has grown at 234% of the pace needed to achieve its 2035 jobs growth target of 1,531 units. During this period, the total number of jobs in Covington grew by roughly 42%. At this current rate, Covington is over the pace needed to meet its 2035 jobs growth target, and needs to grow at an annual rate of 0.1% to reach its remaining target by 2035.

## Non-Residential Achieved Densities

| Zoned Density (FAR) | | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|---|
| Very Low | 0 - 0.35 FAR | 0 | 0 | |
| Low | 0.35 - 0.5 FAR | 0 | 0 | |
| Medium Low | 0.5 - 1.0 FAR | 0 | 0 | |
| Medium High | 1.0 - 3.0 FAR | 0 | 0 | |
| High | 3.0 & up FAR | 0 | 0 | |
| | Total | 0 | 0 | |

| Achieved Density Level | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|
| Very Low | 0 | 0 | 0.0 |
| Low | 0 | 0 | 0.0 |
| Medium Low | 0 | 0 | 0.0 |
| Medium High | 0 | 0 | 0.0 |
| High | 0 | 0 | 0.0 |
| Total | 0 | 0 | 0.0 |



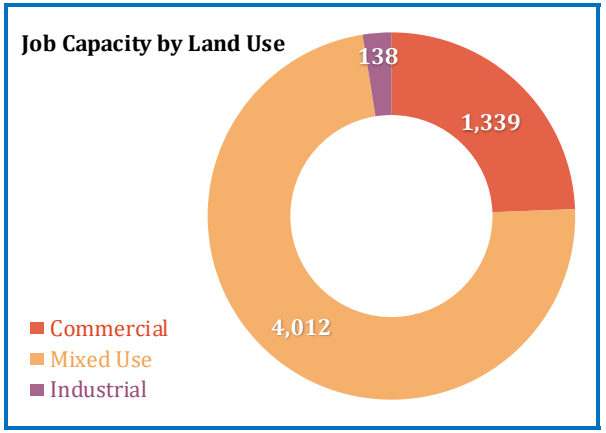



## Covington - Commercial/Industrial Land Supply and Job Capacity

| Land Supply | Gross Area (acres) | Critical Areas (acres) | ROWs (acres) | Public Purpose (acres) | Initial Land Supply | Market Factor | Buildable Area (acres) |
|---|---|---|---|---|---|---|---|
| **Vacant / Redev.** | | | | | | | |
| Commercial | 42.1 | 9.7 | 3.2 | 1.6 | 27.6 | 5% - 10% | 24.5 |
| Mixed Use | 213.2 | 37.5 | 17.6 | 8.8 | 149.3 | 0% - 25% | 111.4 |
| Industrial | 11.3 | 0.4 | 1.1 | 0.5 | 9.2 | 45% | 4.3 |
| **Non-Res Land Total** | **266.6** | **47.7** | **21.9** | **10.9** | **186.1** | | **140.3** |

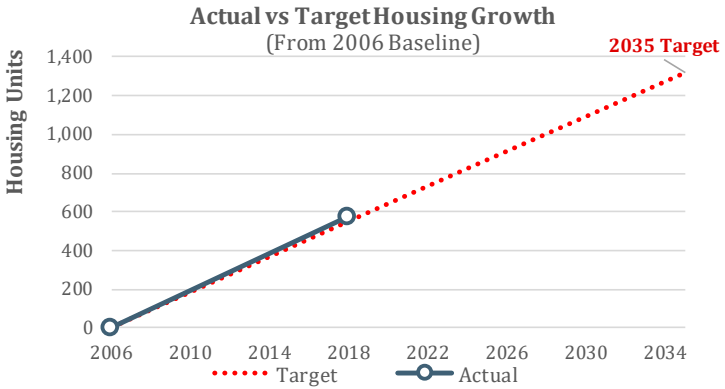
| Job Capacity by Land Use | Net Buildable Area (mil.sq.ft.) | Assumed Density Range (FAR) | Existing Floor Area (million sq.ft.) | Floor Area Capac. (million sq.ft.) | Sq. ft. per Job | Job Capacity |
|---|---|---|---|---|---|---|
| **Commercial** | | | | | | |
| Vacant | 0.79 | 0.23 / 0.69 | 0.00 | 0.41 | 400 | 1,019 |
| Redevelopable | 0.30 | 0.23 / 0.69 | 0.03 | 0.13 | 400 | 320 |
| **Commercial Total** | **1.09** | **0.23 / 0.69** | **0.03** | **0.54** | **400** | **1,339** |
| **Mixed-Use** | | | | | | |
| Vacant | 0.30 | 0.26 / 0.80 | 0.00 | 0.23 | 400 / 450 | 582 |
| Redevelopable | 3.27 | 0.26 / 0.80 | 1.18 | 1.37 | 400 / 450 | 3429 |
| **Mixed Use Total** | **3.57** | **0.26 / 0.80** | **1.18** | **1.60** | **400 / 450** | **4,012** |
| **Industrial** | | | | | | |
| Vacant | 0.22 | 0.50 | 0.00 | 0.11 | 800 | 138 |
| Redevelopable | 0.00 | 0.50 | 0.00 | 0.00 | 800 | 0 |
| **Industrial Total** | **0.22** | **0.50** | **0.00** | **0.11** | **800** | **138** |
| **City Total** | | | | | | |
| Commercial | 1.09 | 0.23 / 0.69 | 0.69 | 0.54 | 400 | 1,339 |
| Mixed Use | 3.57 | 0.26 / 0.80 | 0.91 | 1.60 | 400 / 450 | 4,012 |
| Industrial | 0.22 | 0.50 | 0.26 | 0.11 | 800 | 138 |
| *Job Capacity in Pipeline* | | | | | | *2,933* |
| **City Total** | **4.88** | **0.23 / 0.80** | **1.86** | **2.25** | **400 / 800** | **8,421** |

| Job Capacity by Assumed Density Level | # | % |
|---|---|---|
| Very Low Density | 3 | 0% |
| Low Density | 0 | 0% |
| Medium Low Density | 5,485 | 100% |
| Medium High Density | 0 | 0% |
| High Density | 0 | 0% |
| | | |
| *Capacity in Pipeline* | | *2,933* |
| **Total Capacity (jobs)** | | **8,421** |
| Remaining Target (2018-2035) | | 46 |
| **Surplus/Deficit Capacity (jobs)** | | **8,375** |



# City of Duvall

## Housing Growth and Residential Development Trends




| Duvall Housing Growth Target: 2006-2035 | 1,322 |
|---|---|
| 2006 Estimated Housing Units | 2,105 |
| 2018 Estimated Housing Units | 2,681 |
| **Estimated Housing Growth** | **576** |
| Remaining 2035 Target | 746 |

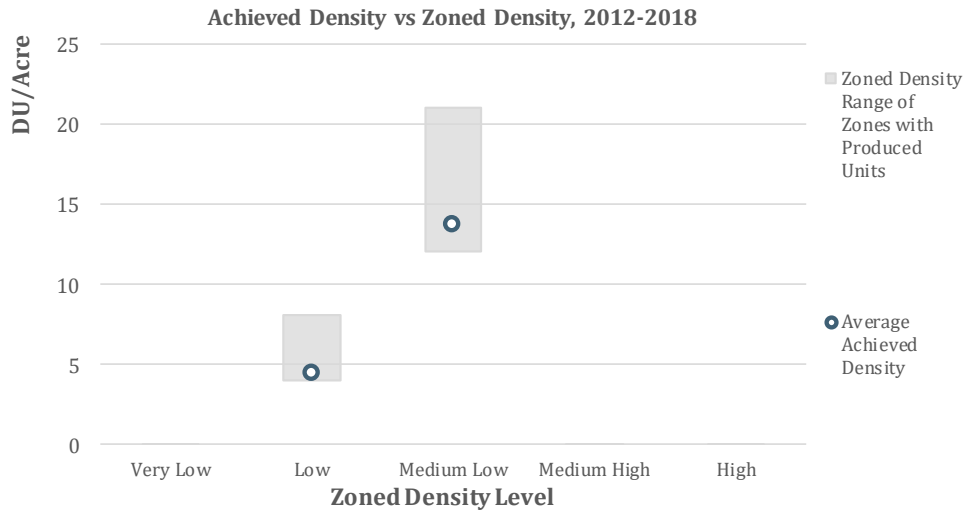
| % of Pace Needed to Achieve 2035 Housing Growth Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| 105.3% | 2.28% | 1.64% |

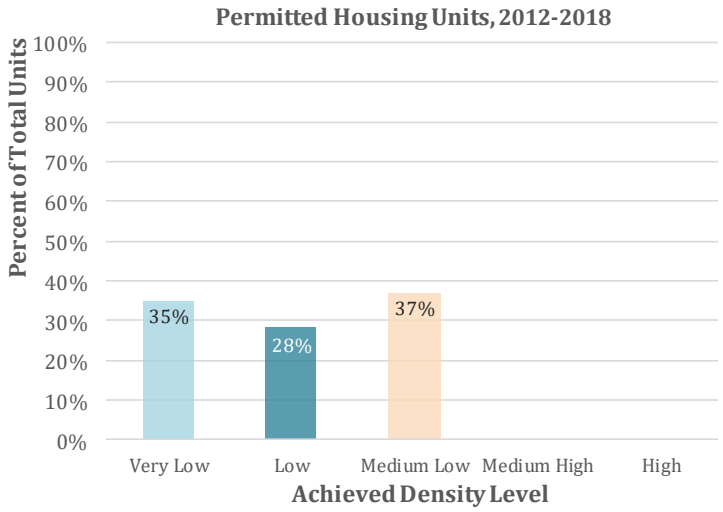
Since 2006, Duvall has grown at 105% of the pace needed to achieve its 2035 housing growth target of 1,322 units. During this period, the total number of housing units in Duvall grew by roughly 27%. At this current rate, Duvall is over the production pace needed to meet its 2035 growth target, and needs to grow at an annual rate of 1.6% to reach its remaining target by 2035.

### Residential Achieved Densities

| Zoned Density (du/acre) | | Gross Area (acres) | Critical Areas (acres) | Public Purpose (acres) | ROWs (acres) | Net Area (acres) | Total Units | Achieved Density (DU/acre) |
|---|---|---|---|---|---|---|---|---|
| Very Low | 0 - 4 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| Low | 4 - 10 du/acre | 51.8 | 11.6 | 4.5 | 8.0 | 27.8 | 122 | **4.4** |
| Medium Low | 10 - 24 du/acre | 7.3 | 0.0 | 0.8 | 1.3 | 5.2 | 71 | **13.7** |
| Medium High | 24 - 48 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| High | 48 & up du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| | **Total** | **59.1** | **11.6** | **5.3** | **9.2** | **33.0** | **193** | **5.9** |

| Achieved Density Level | Net Area (acres) | Total Units |
|---|---|---|
| Very Low | 20.4 | 67 |
| Low | 7.4 | 55 |
| Medium Low | 5.2 | 71 |
| Medium High | 0.0 | 0 |
| High | 0.0 | 0 |
| **Total** | **33.0** | **193** |



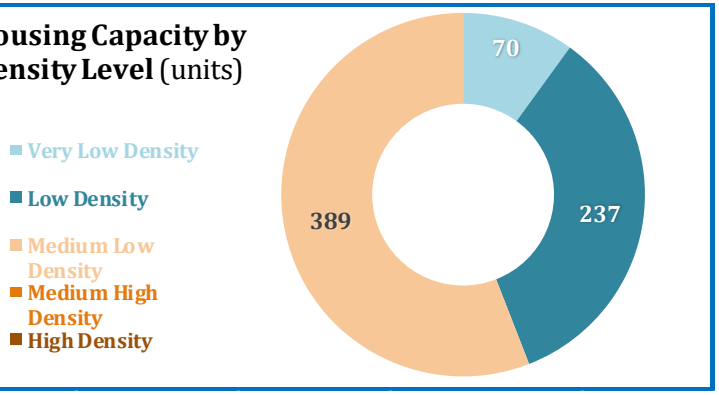



## Duvall - Residential Land Supply and Capacity

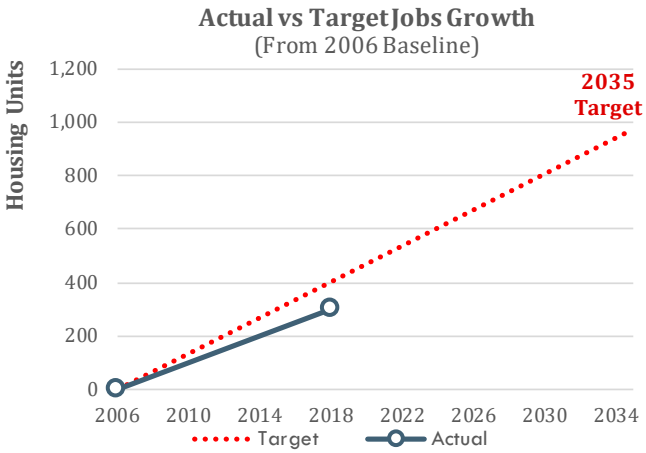
| Assumed Density Level | Vacant/ Redevelopable | Gross Acres | Critical Areas | Infrastructure Constrained Area | ROW & Public Purpose Discount | Market Factor (low/high) | Net Available Acres | Assumed Densities (low/high - units/acre) | Net Capacity (units) |
|---|---|---|---|---|---|---|---|---|---|
| Very Low Density | Vacant Subtotal | | | | 1.45 | 5.0% - 5.0% | 4.05 | 3.3 | 13 |
| | Redev Subtotal | | | | 9.91 | 5.0% - 5.0% | 27.73 | 3.3 | 56 |
| | **Subtotal** | 93.22 | 38.46 | 0.00 | 11.35 | | 31.79 | | **70** |
| Low Density | Vacant Subtotal | | | | 0.68 | 5.0% - 10.0% | 1.89 | 4.5 / 8.0 | 14 |
| | Redev Subtotal | | | | 20.63 | 5.0% - 10.0% | 54.30 | 4.5 / 8.0 | 223 |
| | **Subtotal** | 108.45 | 10.88 | 0.00 | 21.32 | | 56.18 | | **237** |
| Medium Low Density | Vacant Subtotal | | | | 1.99 | 20.0% - 50.0% | 15.54 | 12.0 / 21.0 | 284 |
| | Redev Subtotal | | | | 2.48 | 20.0% - 50.0% | 7.61 | 12.0 / 21.0 | 106 |
| | **Subtotal** | 58.97 | 0.00 | 0.00 | 4.47 | | 23.15 | | **389** |
| Medium High Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | | **0** |
| High Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | | **0** |
| All Zones | Vacant Total | | | | 4.12 | | 21.48 | | 311 |
| | Redev Total | | | | 33.01 | | 89.64 | | 385 |
| | **Total** | **260.64** | **49.34** | **0.00** | **37.14** | | **111.12** | | **696** |

| Capacity (units) | |
|---|---|
| Very Low Density Zones | 70 |
| Low Density Zones | 237 |
| Medium Low Density Zones | 389 |
| Medium High Density Zones | 0 |
| High Density Zones | 0 |
| *Capacity in Pipeline* | *647* |
| **Total Capacity (Units)** | **1,343** |
| Remaining Target (2018-2035) | 746 |
| **Surplus/Deficit Capacity (Units)** | **597** |

**Housing Capacity by Density Level** (units)



# Duvall - Employment Growth and Commercial/Industrial Development Trends




| Duvall Jobs Growth Target: 2006-2035 | 974 |
|---|---|
| 2006 Jobs (PSRC) | 1,182 |
| 2018 Jobs (PSRC) | 1,483 |
| **Total Jobs Growth** | **301** |
| **Remaining 2035 Target** | **673** |

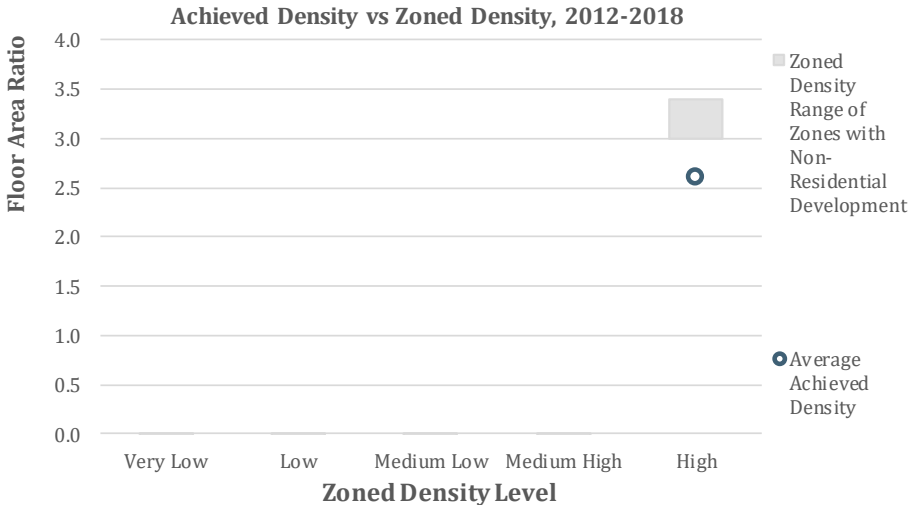
| % of Pace Needed to Achieve 2035 Jobs Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| **74.7%** | **2.12%** | **2.67%** |

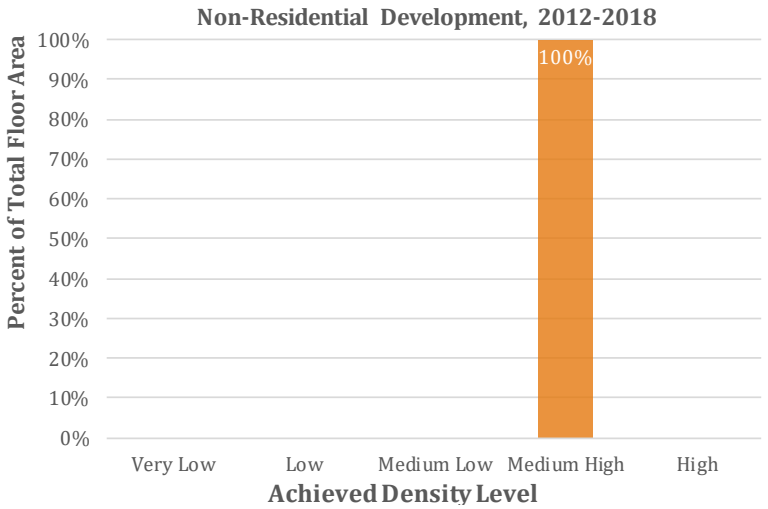
Since 2006, Duvall has grown at 75% of the pace needed to achieve its 2035 jobs growth target of 974 units. During this period, the total number of jobs in Duvall grew by roughly 25%. At this current rate, Duvall is under the pace needed to meet its 2035 jobs growth target, and needs to grow at an annual rate of 2.7% to reach its remaining target by 2035.

## Non-Residential Achieved Densities

| Zoned Density (FAR) | | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|---|
| **Very Low** | 0 - 0.35 FAR | 0 | 0 | |
| **Low** | 0.35 - 0.5 FAR | 0 | 0 | |
| **Medium Low** | 0.5 - 1.0 FAR | 0 | 0 | |
| **Medium High** | 1.0 - 3.0 FAR | 0 | 0 | |
| **High** | 3.0 & up FAR | 39,075 | 101,294 | **2.6** |
| | **Total** | **39,075** | **101,294** | **2.6** |

| Achieved Density Level | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|
| **Very Low** | 0 | 0 | **0.0** |
| **Low** | 0 | 0 | **0.0** |
| **Medium Low** | 0 | 0 | **0.0** |
| **Medium High** | 39,075 | 101,294 | **2.6** |
| **High** | 0 | 0 | **0.0** |
| **Total** | **39,075** | **101,294** | **2.6** |



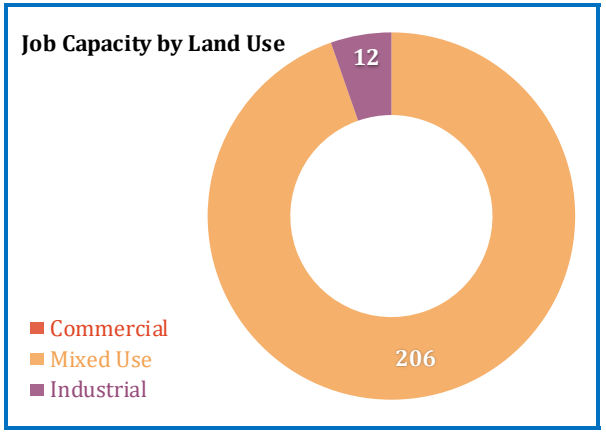



## Duvall - Commercial/Industrial Land Supply and Job Capacity

| Land Supply | Gross Area (acres) | Critical Areas (acres) | ROWs (acres) | Public Purpose (acres) | Initial Land Supply | Market Factor | Buildable Area (acres) |
|---|---|---|---|---|---|---|---|
| **Vacant / Redev.** | | | | | | | |
| Commercial | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0% | 0.0 |
| Mixed Use | 24.1 | 0.0 | 1.2 | 0.2 | 22.7 | 25% - 50% | 14.4 |
| Industrial | 1.2 | 0.0 | 0.1 | 0.0 | 1.1 | 15% | 0.9 |
| **Non-Res Land Total** | **25.3** | **0.0** | **1.3** | **0.3** | **23.8** | | **15.4** |

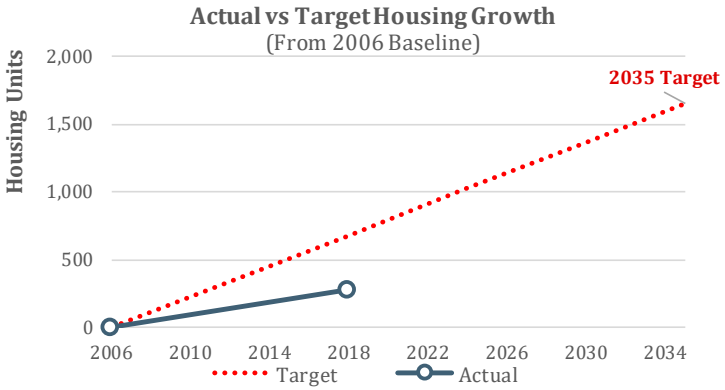
| Job Capacity by Land Use | Net Buildable Area (mil.sq.ft.) | Assumed Density Range (FAR) | Existing Floor Area (million sq.ft.) | Floor Area Capac. (million sq.ft.) | Sq. ft. per Job | Job Capacity |
|---|---|---|---|---|---|---|
| **Commercial** | | | | | | |
| Vacant | 0.00 | 0.00 | 0.00 | 0.00 | 0 | 0 |
| Redevelopable | 0.00 | 0.00 | 0.00 | 0.00 | 0 | 0 |
| **Commercial Total** | **0.00** | **0.00** | **0.00** | **0.00** | **0** | **0** |
| **Mixed-Use** | | | | | | |
| Vacant | 0.60 | 0.20 | 0.00 | 0.12 | 500 / 600 | 205 |
| Redevelopable | 0.03 | 0.20 | 0.02 | 0.00 | 500 / 600 | 1 |
| **Mixed Use Total** | **0.63** | **0.20** | **0.02** | **0.12** | **500 / 600** | **206** |
| **Industrial** | | | | | | |
| Vacant | 0.04 | 0.40 | 0.00 | 0.02 | 1,400 | 12 |
| Redevelopable | 0.00 | 0.40 | 0.00 | 0.00 | 1,400 | 0 |
| **Industrial Total** | **0.04** | **0.40** | **0.00** | **0.02** | **1,400** | **12** |
| **City Total** | | | | | | |
| Commercial | 0.00 | 0.00 | 0.69 | 0.00 | 0 | 0 |
| Mixed Use | 0.63 | 0.20 | 0.91 | 0.12 | 500 / 600 | 206 |
| Industrial | 0.04 | 0.40 | 0.26 | 0.02 | 1,400 | 12 |
| *Job Capacity in Pipeline* | | | | | | *464* |
| **City Total** | **0.67** | **0.40** | **1.86** | **0.14** | **0 / 1400** | **681** |

| Job Capacity by Assumed Density Level | # | % |
|---|---|---|
| Very Low Density | 206 | 95% |
| Low Density | 12 | 5% |
| Medium Low Density | 0 | 0% |
| Medium High Density | 0 | 0% |
| High Density | 0 | 0% |
| | | |
| *Capacity in Pipeline* | | *464* |
| **Total Capacity (jobs)** | | **681** |
| Remaining Target (2018-2035) | | 673 |
| **Surplus/Deficit Capacity (jobs)** | | **8** |



# City of Enumclaw

## Housing Growth and Residential Development Trends




| Enumclaw Housing Growth Target: 2006-2035 | 1,653 |
|---|---|
| 2006 Estimated Housing Units | 5,048 |
| 2018 Estimated Housing Units | 5,326 |
| **Estimated Housing Growth** | **278** |
| Remaining 2035 Target | 1,375 |

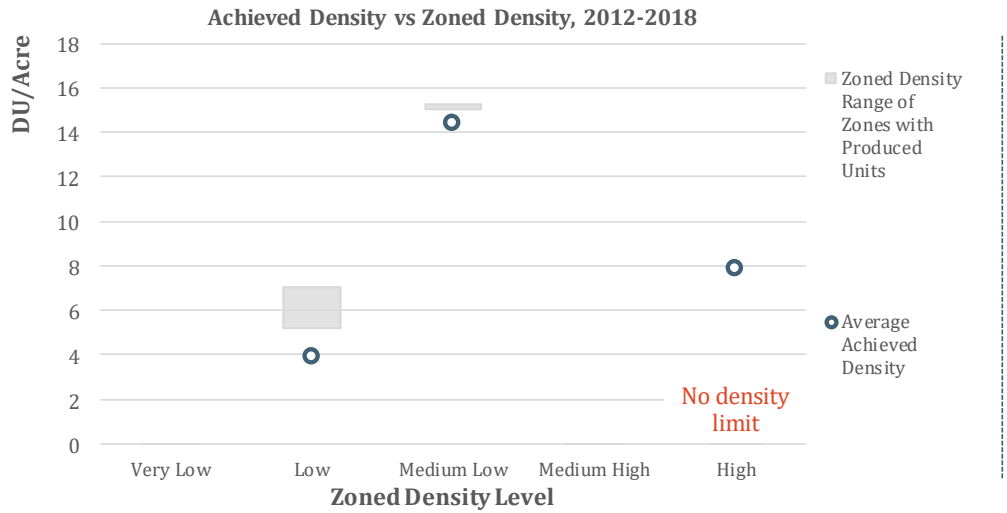
| % of Pace Needed to Achieve 2035 Housing Growth Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| 40.7% | 0.46% | 1.52% |

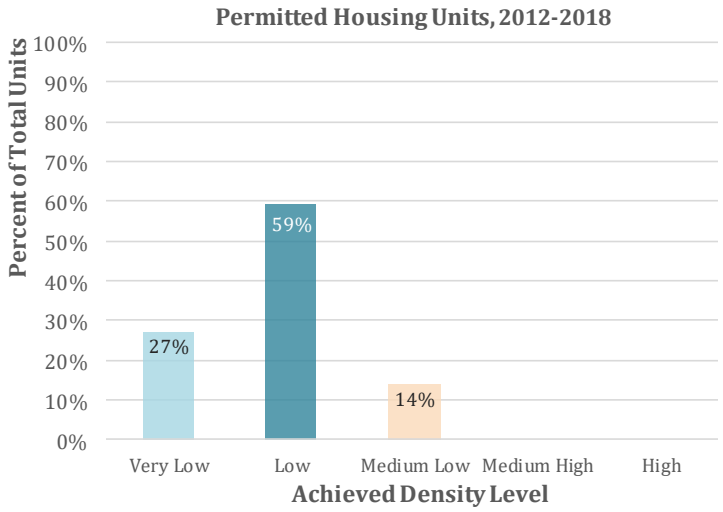
Since 2006, Enumclaw has grown at 41% of the pace needed to achieve its 2035 housing growth target of 1,653 units. During this period, the total number of housing units in Enumclaw grew by roughly 6%. At this current rate, Enumclaw is under the production pace needed to meet its 2035 growth target, and needs to grow at an annual rate of 1.5% to reach its remaining target by 2035.

### Residential Achieved Densities

| Zoned Density (du/acre) | | Gross Area (acres) | Critical Areas (acres) | Public Purpose (acres) | ROWs (acres) | Net Area (acres) | Total Units | Achieved Density (DU/acre) |
|---|---|---|---|---|---|---|---|---|
| Very Low | 0 - 4 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| Low | 4 - 10 du/acre | 46.1 | 0.0 | 1.7 | 3.9 | 40.6 | 157 | **3.9** |
| Medium Low | 10 - 24 du/acre | 3.6 | 0.0 | 0.0 | 0.0 | 3.6 | 52 | **14.4** |
| Medium High | 24 - 48 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| High | 48 & up du/acre | 46.0 | 4.1 | 8.9 | 10.8 | 22.2 | 174 | **7.8** |
| | **Total** | **95.7** | **4.1** | **10.5** | **14.6** | **66.4** | **383** | **5.8** |

| Achieved Density Level | Net Area (acres) | Total Units |
|---|---|---|
| Very Low | 32.8 | 104 |
| Low | 29.9 | 226 |
| Medium Low | 3.7 | 53 |
| Medium High | 0.0 | 0 |
| High | 0.0 | 0 |
| **Total** | **66.4** | **383** |



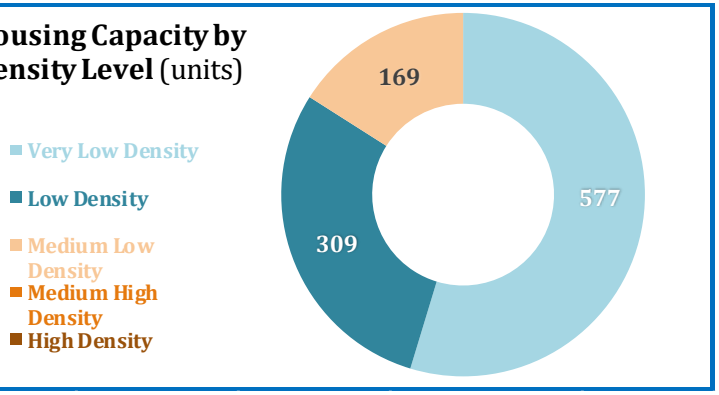



## Enumclaw - Residential Land Supply and Capacity

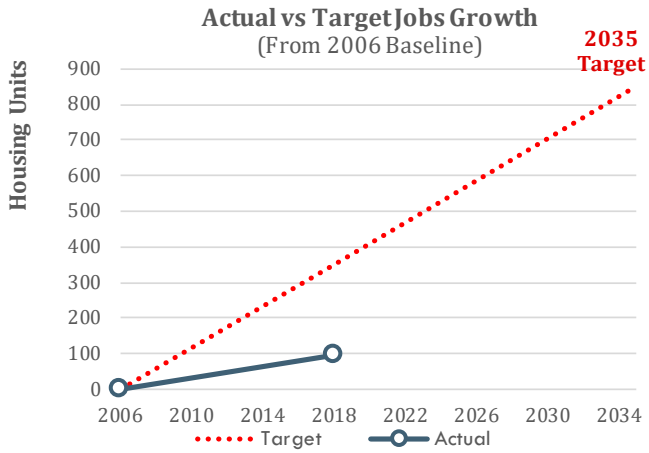
| Assumed Density Level | Vacant/ Redevelopable | Gross Acres | Critical Areas | Infrastructure Constrained Area | ROW & Public Purpose Discount | Market Factor (low/high) | Net Available Acres | Assumed Densities (low/high - units/acre) | Net Capacity (units) |
|---|---|---|---|---|---|---|---|---|---|
| Very Low Density | Vacant Subtotal | | | | 11.59 | 5.0% - 40.0% | 63.44 | 3.2 | 112 |
| | Redev Subtotal | | | | 46.42 | 5.0% - 40.0% | 207.07 | 3.2 | 466 |
| | **Subtotal** | 816.36 | 28.62 | 215.28 | 58.01 | | 270.51 | | **577** |
| Low Density | Vacant Subtotal | | | | 10.70 | 5.0% - 50.0% | 47.38 | 4.4 / 6.8 | 288 |
| | Redev Subtotal | | | | 1.01 | 5.0% - 50.0% | 4.31 | 4.4 / 6.8 | 22 |
| | **Subtotal** | 71.84 | 3.42 | 0.00 | 11.71 | | 51.69 | | **309** |
| Medium Low Density | Vacant Subtotal | | | | 2.86 | 50.0% - 50.0% | 11.44 | 14.4 | 164 |
| | Redev Subtotal | | | | 0.70 | 50.0% - 50.0% | 2.82 | 14.4 | 4 |
| | **Subtotal** | 37.44 | 1.78 | 0.00 | 3.57 | | 14.26 | | **169** |
| Medium High Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | | **0** |
| High Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | | **0** |
| All Zones | Vacant Total | | | | 25.15 | | 122.27 | | 564 |
| | Redev Total | | | | 48.13 | | 214.19 | | 492 |
| | **Total** | **925.64** | **33.83** | **215.28** | **73.28** | | **336.45** | | **1,056** |

| Capacity (units) | |
|---|---|
| Very Low Density Zones | 577 |
| Low Density Zones | 309 |
| Medium Low Density Zones | 169 |
| Medium High Density Zones | 0 |
| High Density Zones | 0 |
| *Capacity in Pipeline* | *252* |
| **Total Capacity (Units)** | **1,308** |
| Remaining Target (2018-2035) | 1,375 |
| **Surplus/Deficit Capacity (Units)** | **-67** |

**Housing Capacity by Density Level** (units)



# Enumclaw - Employment Growth and Commercial/Industrial Development Trends




| Enumclaw Jobs Growth Target: 2006-2035 | 853 |
|---|---|
| 2006 Jobs (PSRC) | 4,960 |
| 2018 Jobs (PSRC) | 5,056 |
| **Total Jobs Growth** | **96** |
| **Remaining 2035 Target** | **757** |

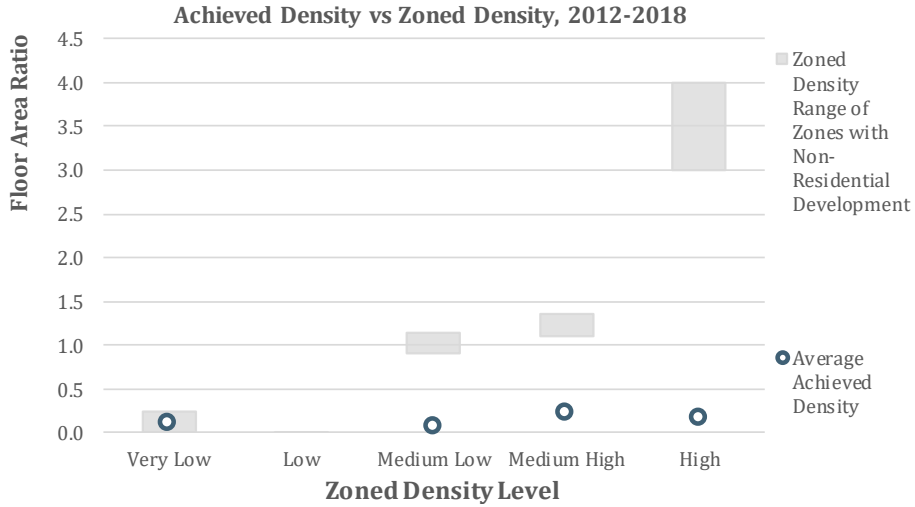
| % of Pace Needed to Achieve 2035 Jobs Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| **27.2%** | **0.16%** | **0.88%** |

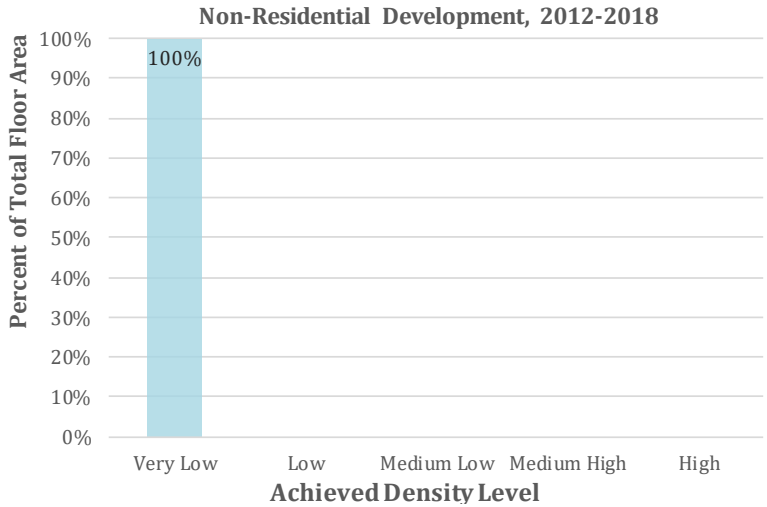
Since 2006, Enumclaw has grown at 27% of the pace needed to achieve its 2035 jobs growth target of 853 units. During this period, the total number of jobs in Enumclaw grew by roughly 2%. At this current rate, Enumclaw is under the pace needed to meet its 2035 jobs growth target, and needs to grow at an annual rate of 0.9% to reach its remaining target by 2035.

## Non-Residential Achieved Densities

| Zoned Density (FAR) | | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|---|
| **Very Low** | 0 - 0.35 FAR | 135,907 | 14,549 | **0.1** |
| **Low** | 0.35 - 0.5 FAR | 0 | 0 | |
| **Medium Low** | 0.5 - 1.0 FAR | 22,000 | 1,623 | **0.1** |
| **Medium High** | 1.0 - 3.0 FAR | 98,488 | 22,016 | **0.2** |
| **High** | 3.0 & up FAR | 785,991 | 124,555 | **0.2** |
| | **Total** | **1,042,386** | **162,743** | **0.2** |

| Achieved Density Level | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|
| **Very Low** | 1,042,386 | 162,743 | **0.2** |
| **Low** | 0 | 0 | **0.0** |
| **Medium Low** | 0 | 0 | **0.0** |
| **Medium High** | 0 | 0 | **0.0** |
| **High** | 0 | 0 | **0.0** |
| **Total** | **1,042,386** | **162,743** | **0.2** |



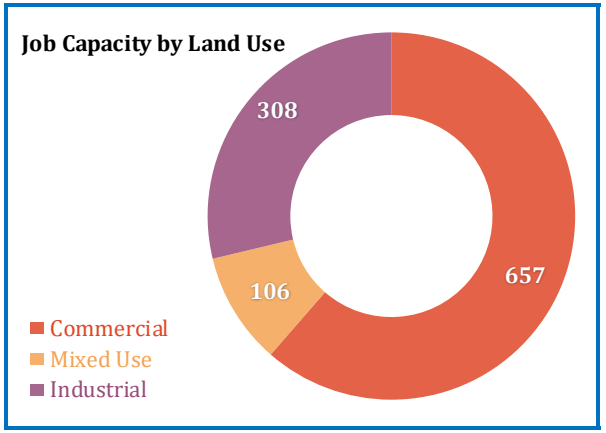



## Enumclaw - Commercial/Industrial Land Supply and Job Capacity

| Land Supply | Gross Area (acres) | Critical Areas (acres) | ROWs (acres) | Public Purpose (acres) | Initial Land Supply | Market Factor | Buildable Area (acres) |
|---|---|---|---|---|---|---|---|
| **Vacant / Redev.** | | | | | | | |
| Commercial | 86.7 | 4.1 | 4.1 | 4.1 | 74.3 | 15% - 20% | 60.6 |
| Mixed Use | 10.7 | 1.1 | 0.5 | 0.5 | 8.7 | 40% - 50% | 4.5 |
| Industrial | 74.9 | 11.5 | 3.2 | 3.2 | 57.0 | 36% | 34.2 |
| **Non-Res Land Total** | **172.3** | **16.7** | **7.8** | **7.8** | **140.0** | | **99.2** |

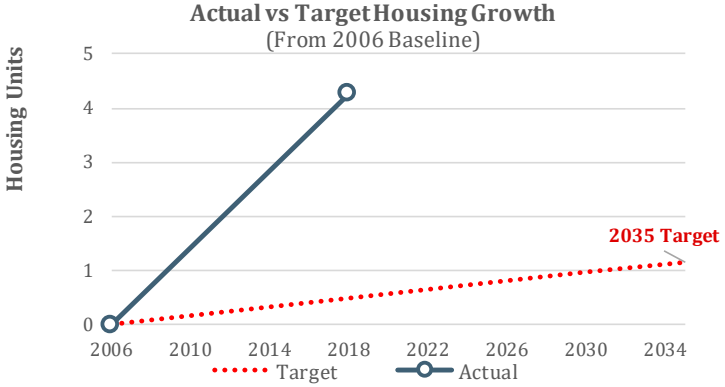
| Job Capacity by Land Use | Net Buildable Area (mil.sq.ft.) | Assumed Density Range (FAR) | Existing Floor Area (million sq.ft.) | Floor Area Capac. (million sq.ft.) | Sq. ft. per Job | Job Capacity |
|---|---|---|---|---|---|---|
| **Commercial** | | | | | | |
| Vacant | 0.97 | 0.07 / 0.22 | 0.00 | 0.15 | 660 | 230 |
| Redevelopable | 1.67 | 0.07 / 0.22 | 0.02 | 0.28 | 660 | 427 |
| **Commercial Total** | **2.64** | **0.07 / 0.22** | **0.02** | **0.43** | **660** | **657** |
| **Mixed-Use** | | | | | | |
| Vacant | 0.06 | 0.50 | 0.00 | 0.03 | 0 / 660 | 41 |
| Redevelopable | 0.14 | 0.50 | 0.01 | 0.04 | 0 / 660 | 64 |
| **Mixed Use Total** | **0.19** | **0.50** | **0.01** | **0.07** | **0 / 660** | **106** |
| **Industrial** | | | | | | |
| Vacant | 1.15 | 0.25 | 0.00 | 0.29 | 1,200 | 239 |
| Redevelopable | 0.34 | 0.25 | 0.00 | 0.08 | 1,200 | 69 |
| **Industrial Total** | **1.49** | **0.25** | **0.00** | **0.37** | **1,200** | **308** |
| **City Total** | | | | | | |
| Commercial | 2.64 | 0.07 / 0.22 | 0.69 | 0.43 | 660 | 657 |
| Mixed Use | 0.19 | 0.50 | 0.91 | 0.07 | 0 / 660 | 106 |
| Industrial | 1.49 | 0.25 | 0.26 | 0.37 | 1,200 | 308 |
| *Job Capacity in Pipeline* | | | | | | *81* |
| **City Total** | **4.32** | **0.50** | **1.86** | **0.87** | **0 / 1200** | **1,152** |

| Job Capacity by Assumed Density Level | # | % |
|---|---|---|
| Very Low Density | 981 | 92% |
| Low Density | 0 | 0% |
| Medium Low Density | 90 | 8% |
| Medium High Density | 0 | 0% |
| High Density | 0 | 0% |
| | | |
| *Capacity in Pipeline* | | *81* |
| **Total Capacity (jobs)** | | **1,152** |
| Remaining Target (2018-2035) | | 757 |
| **Surplus/Deficit Capacity (jobs)** | | **395** |



# Town of Hunts Point

## Housing Growth and Residential Development Trends




| Hunts Point Housing Growth Target: 2006-2035 | 1 |
|---|---|
| 2006 Estimated Housing Units | 183 |
| 2018 Estimated Housing Units | 187 |
| **Estimated Housing Growth** | **4** |
| **Remaining 2035 Target** | **0** |

| % of Pace Needed to Achieve 2035 Housing Growth Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| 887.9% | 0.19% | Met Target |

Since 2006, Hunts Point has grown at 888% of the pace needed to achieve its 2035 housing growth target of 1 units. During this period, the total number of housing units in Hunts Point grew by roughly 2%. Hunts Point has achieved its 2035 housing growth target.

### Residential Achieved Densities

| Zoned Density (du/acre) | | Gross Area (acres) | Critical Areas (acres) | Public Purpose (acres) | ROWs (acres) | Net Area (acres) | Total Units | Achieved Density (DU/acre) |
|---|---|---|---|---|---|---|---|---|
| **Very Low** | 0 - 4 du/acre | 3.2 | 0.0 | 0.0 | 0.0 | 3.2 | 3 | **1.0** |
| **Low** | 4 - 10 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| **Medium Low** | 10 - 24 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| **Medium High** | 24 - 48 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| **High** | 48 & up du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| | **Total** | **3.2** | **0.0** | **0.0** | **0.0** | **3.2** | **3** | **1.0** |

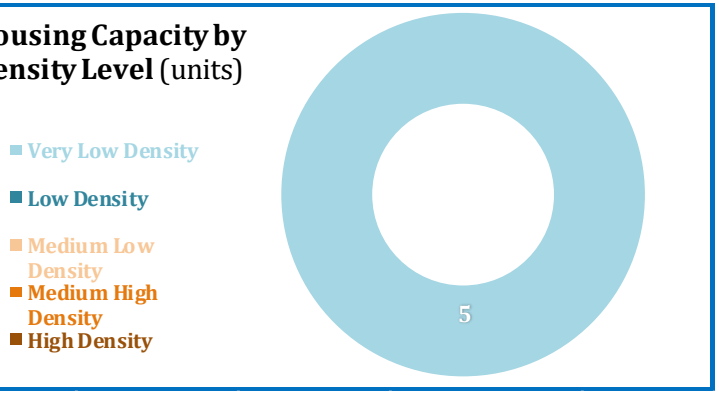
| Achieved Density Level | Net Area (acres) | Total Units |
|---|---|---|
| **Very Low** | 3.2 | 3 |
| **Low** | 0.0 | 0 |
| **Medium Low** | 0.0 | 0 |
| **Medium High** | 0.0 | 0 |
| **High** | 0.0 | 0 |
| **Total** | **3.2** | **3** |

## Hunts Point - Residential Land Supply and Capacity

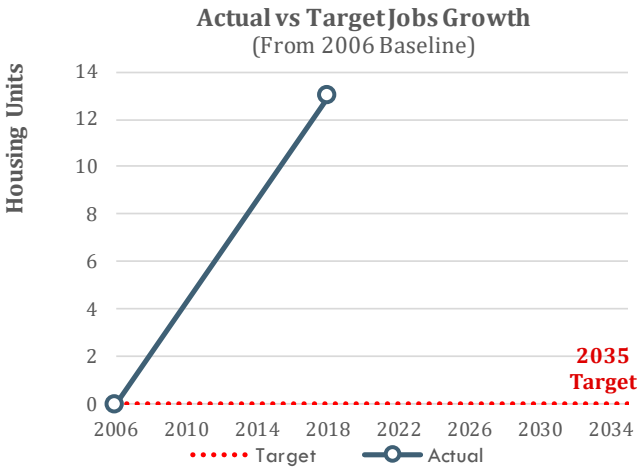
| Assumed Density Level | Vacant/ Redevelopable | Gross Acres | Critical Areas | Infrastructure Constrained Area | ROW & Public Purpose Discount | Market Factor (low/high) | Net Available Acres | Assumed Densities (low/high - units/acre) | Net Capacity (units) |
|---|---|---|---|---|---|---|---|---|---|
| Very Low Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 2.68 | 1.0 / 3.6 | 5 |
| | Redev Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 1.0 / 3.6 | 0 |
| | **Subtotal** | 17.08 | 6.54 | 0.40 | 0.00 | | 2.68 | | **5** |
| Low Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | | **0** |
| Medium Low Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | | **0** |
| Medium High Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | | **0** |
| High Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | | **0** |
| All Zones | Vacant Total | | | | 0.00 | | 2.68 | | 5 |
| | Redev Total | | | | 0.00 | | 0.00 | | 0 |
| | **Total** | **17.08** | **6.54** | **0.40** | **0.00** | | **2.68** | | **5** |

| Capacity (units) | |
|---|---|
| Very Low Density Zones | 5 |
| Low Density Zones | 0 |
| Medium Low Density Zones | 0 |
| Medium High Density Zones | 0 |
| High Density Zones | 0 |
| *Capacity in Pipeline* | *0* |
| **Total Capacity (Units)** | **5** |
| Remaining Target (2018-2035) | 0 |
| **Surplus/Deficit Capacity (Units)** | **5** |

**Housing Capacity by Density Level** (units)



# Hunts Point - Employment Growth and Commercial/Industrial Development Trends




| Hunts Point Jobs Growth Target: 2006-2035 | 0 |
|---|---|
| 2006 Jobs (PSRC) | 51 |
| 2018 Jobs (PSRC) | 64 |
| **Total Jobs Growth** | **13** |
| **Remaining 2035 Target** | **Not Applicable** |

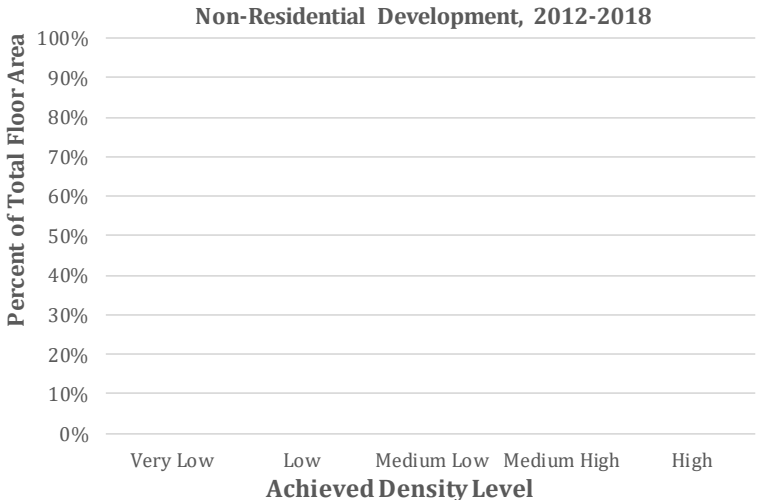
| % of Pace Needed to Achieve 2035 Jobs Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| **Not Applicable** | **2.12%** | **Not Applicable** |

Since 2006, the total number of jobs in Hunts Point grew by roughly 2%. There is no 2035 jobs growth target.

## Non-Residential Achieved Densities

| Zoned Density (FAR) | | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|---|
| **Very Low** | 0 - 0.35 FAR | 0 | 0 | |
| **Low** | 0.35 - 0.5 FAR | 0 | 0 | |
| **Medium Low** | 0.5 - 1.0 FAR | 0 | 0 | |
| **Medium High** | 1.0 - 3.0 FAR | 0 | 0 | |
| **High** | 3.0 & up FAR | 0 | 0 | |
| | **Total** | **0** | **0** | |

| Achieved Density Level | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|
| **Very Low** | 0 | 0 | **0.0** |
| **Low** | 0 | 0 | **0.0** |
| **Medium Low** | 0 | 0 | **0.0** |
| **Medium High** | 0 | 0 | **0.0** |
| **High** | 0 | 0 | **0.0** |
| **Total** | **0** | **0** | **0.0** |

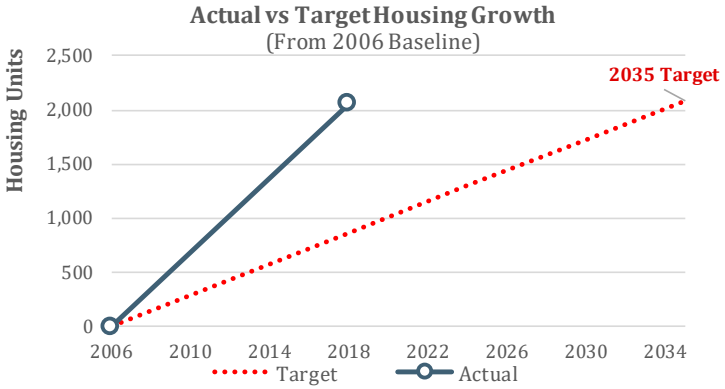


## Hunts Point - Commercial/Industrial Land Supply and Job Capacity

(no job capacity in Hunts Point)

# City of Maple Valley

## Housing Growth and Residential Development Trends




| Maple Valley Housing Growth Target: 2006-2035 | 2,088 |
|---|---|
| 2006 Estimated Housing Units | 6,765 |
| 2018 Estimated Housing Units | 8,826 |
| **Estimated Housing Growth** | **2,061** |
| Remaining 2035 Target | 27 |

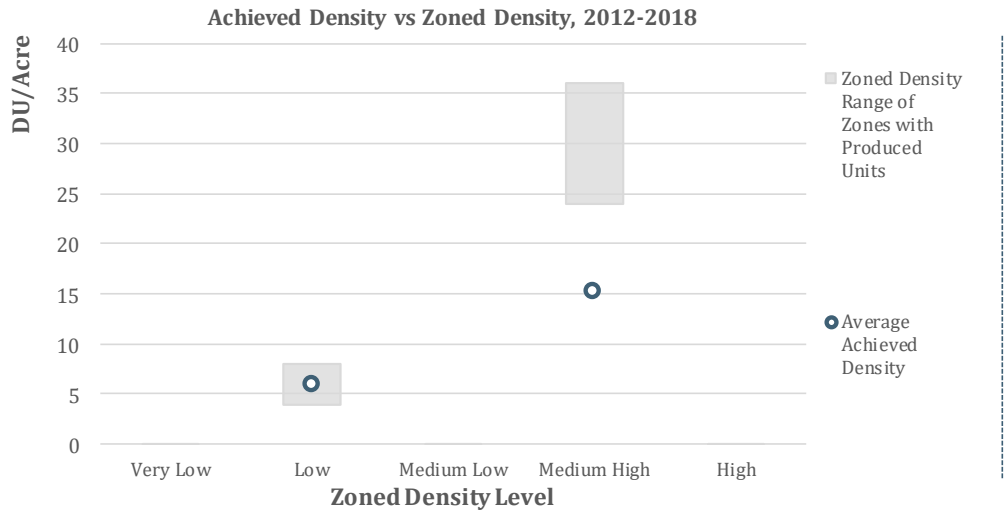
| % of Pace Needed to Achieve 2035 Housing Growth Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| 238.6% | 2.54% | 0.02% |

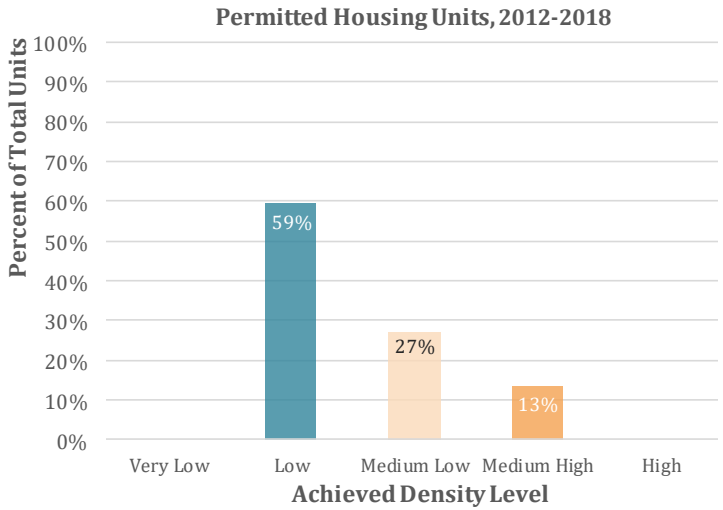
Since 2006, Maple Valley has grown at 239% of the pace needed to achieve its 2035 housing growth target of 2,088 units. During this period, the total number of housing units in Maple Valley grew by roughly 30%. At this current rate, Maple Valley is over the production pace needed to meet its 2035 growth target, and needs to grow at an annual rate of 0% to reach its remaining target by 2035.

### Residential Achieved Densities

| Zoned Density (du/acre) | | Gross Area (acres) | Critical Areas (acres) | Public Purpose (acres) | ROWs (acres) | Net Area (acres) | Total Units | Achieved Density (DU/acre) |
|---|---|---|---|---|---|---|---|---|
| Very Low | 0 - 4 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| Low | 4 - 10 du/acre | 126.9 | 30.6 | 0.1 | 0.2 | 96.0 | 557 | **5.8** |
| Medium Low | 10 - 24 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| Medium High | 24 - 48 du/acre | 30.7 | 0.0 | 1.1 | 4.4 | 25.2 | 381 | **15.1** |
| High | 48 & up du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| | **Total** | **157.7** | **30.6** | **1.3** | **4.7** | **121.2** | **938** | **7.7** |

| Achieved Density Level | Net Area (acres) | Total Units |
|---|---|---|
| Very Low | 0.0 | 0 |
| Low | 96.0 | 557 |
| Medium Low | 20.1 | 255 |
| Medium High | 5.1 | 126 |
| High | 0.0 | 0 |
| **Total** | **121.2** | **938** |



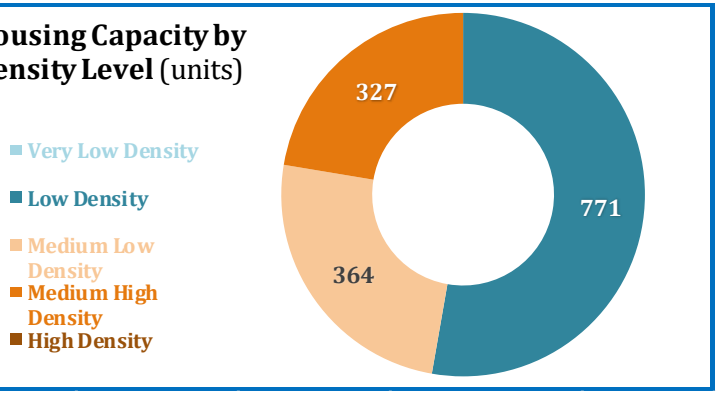



## Maple Valley - Residential Land Supply and Capacity

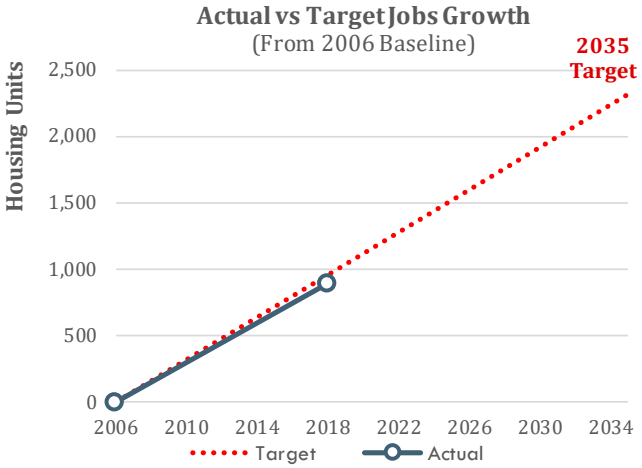
| Assumed Density Level | Vacant/ Redevelopable | Gross Acres | Critical Areas | Infrastructure Constrained Area | ROW & Public Purpose Discount | Market Factor (low/high) | Net Available Acres | Assumed Densities (low/high - units/acre) | Net Capacity (units) |
|---|---|---|---|---|---|---|---|---|---|
| Very Low Density | Vacant Subtotal | | | | 0.02 | 12.0% - 12.0% | 0.07 | 0.0 | 0 |
| | Redev Subtotal | | | | 0.08 | 12.0% - 12.0% | 0.36 | 0.0 | 0 |
| | **Subtotal** | 0.70 | 0.00 | 0.00 | 0.10 | | 0.43 | | **0** |
| Low Density | Vacant Subtotal | | | | 12.26 | 5.0% - 7.0% | 37.60 | 5.4 / 7.4 | 245 |
| | Redev Subtotal | | | | 38.16 | 5.0% - 7.0% | 117.47 | 5.4 / 7.4 | 526 |
| | **Subtotal** | 380.10 | 107.60 | 0.00 | 50.42 | | 155.07 | | **771** |
| Medium Low Density | Vacant Subtotal | | | | 0.85 | 12.0% - 20.0% | 3.60 | 12.0 / 18.0 | 50 |
| | Redev Subtotal | | | | 11.13 | 12.0% - 20.0% | 39.41 | 12.0 / 18.0 | 314 |
| | **Subtotal** | 28.70 | 0.00 | 0.00 | 11.98 | | 43.01 | | **364** |
| Medium High Density | Vacant Subtotal | | | | 2.69 | 12.0% - 20.0% | 12.10 | 24.0 / 24.6 | 297 |
| | Redev Subtotal | | | | 0.27 | 12.0% - 20.0% | 1.22 | 24.0 / 24.6 | 30 |
| | **Subtotal** | 63.90 | 4.70 | 0.00 | 2.96 | | 13.32 | | **327** |
| High Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | | **0** |
| All Zones | Vacant Total | | | | 15.81 | | 53.37 | | 592 |
| | Redev Total | | | | 49.64 | | 158.47 | | 870 |
| | **Total** | **473.40** | **112.30** | **0.00** | **65.45** | | **211.84** | | **1,462** |

| Capacity (units) | |
|---|---|
| Very Low Density Zones | 0 |
| Low Density Zones | 771 |
| Medium Low Density Zones | 364 |
| Medium High Density Zones | 327 |
| High Density Zones | 0 |
| *Capacity in Pipeline* | *111* |
| **Total Capacity (Units)** | **1,573** |
| Remaining Target (2018-2035) | 27 |
| **Surplus/Deficit Capacity (Units)** | **1,546** |

**Housing Capacity by Density Level** (units)



# Maple Valley - Employment Growth and Commercial/Industrial Development Trends




| Maple Valley Jobs Growth Target: 2006-2035 | 2,320 |
|---|---|
| 2006 Jobs (PSRC) | 3,297 |
| 2018 Jobs (PSRC) | 4,190 |
| **Total Jobs Growth** | **893** |
| **Remaining 2035 Target** | **1,427** |

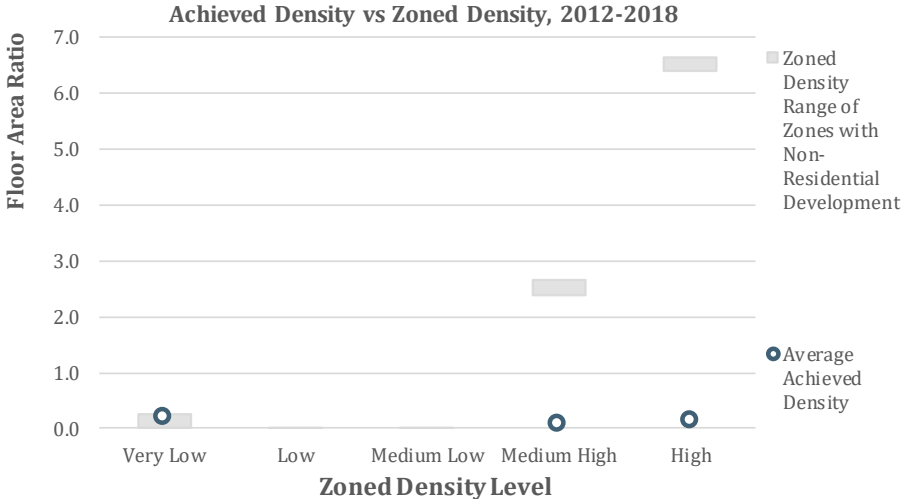
| % of Pace Needed to Achieve 2035 Jobs Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| **93.0%** | **2.26%** | **2.00%** |

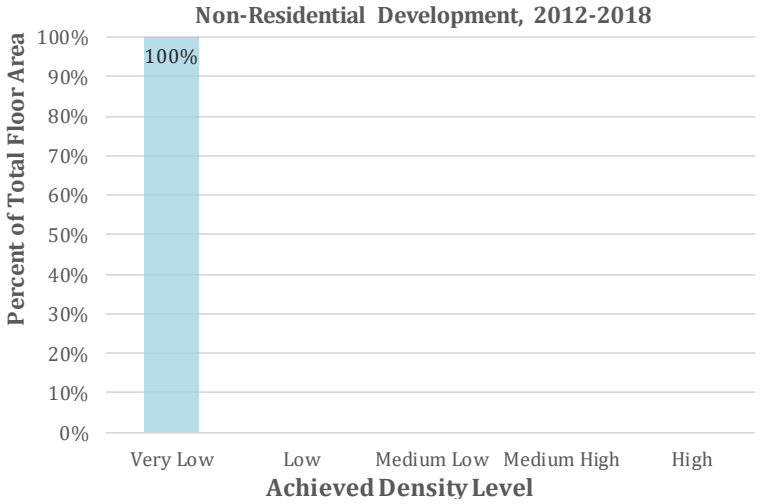
Since 2006, Maple Valley has grown at 93% of the pace needed to achieve its 2035 jobs growth target of 2,320 units. During this period, the total number of jobs in Maple Valley grew by roughly 27%. At this current rate, Maple Valley is under the pace needed to meet its 2035 jobs growth target, and needs to grow at an annual rate of 2% to reach its remaining target by 2035.

## Non-Residential Achieved Densities

| Zoned Density (FAR) | | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|---|
| **Very Low** | 0 - 0.35 FAR | 2,140,550 | 409,209 | **0.2** |
| **Low** | 0.35 - 0.5 FAR | 0 | 0 | |
| **Medium Low** | 0.5 - 1.0 FAR | 0 | 0 | |
| **Medium High** | 1.0 - 3.0 FAR | 63,513 | 4,826 | **0.1** |
| **High** | 3.0 & up FAR | 2,133,765 | 275,858 | **0.1** |
| | **Total** | **4,337,828** | **689,893** | **0.2** |

| Achieved Density Level | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|
| **Very Low** | 4,337,828 | 689,893 | **0.2** |
| **Low** | 0 | 0 | **0.0** |
| **Medium Low** | 0 | 0 | **0.0** |
| **Medium High** | 0 | 0 | **0.0** |
| **High** | 0 | 0 | **0.0** |
| **Total** | **4,337,828** | **689,893** | **0.2** |



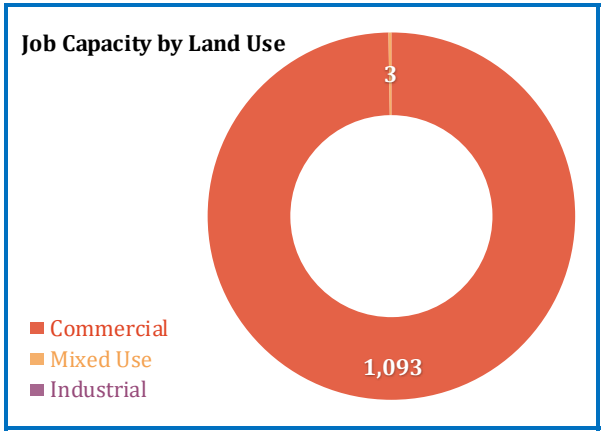
## Maple Valley - Commercial/Industrial Land Supply and Job Capacity

| Land Supply | Gross Area (acres) | Critical Areas (acres) | ROWs (acres) | Public Purpose (acres) | Initial Land Supply | Market Factor | Buildable Area (acres) |
|---|---|---|---|---|---|---|---|
| **Vacant / Redev.** | | | | | | | |
| Commercial | 76.0 | 22.1 | 3.8 | 4.9 | 45.3 | 12% - 16% | 37.4 |
| Mixed Use | 0.6 | 0.0 | 0.0 | 0.1 | 0.5 | 12% | 0.4 |
| Industrial | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0% | 0.0 |
| **Non-Res Land Total** | **76.6** | **22.1** | **3.8** | **20.5** | **191.7** | | **37.8** |

| Job Capacity by Land Use | Net Buildable Area (mil.sq.ft.) | Assumed Density Range (FAR) | Existing Floor Area (million sq.ft.) | Floor Area Capac. (million sq.ft.) | Sq. ft. per Job | Job Capacity |
|---|---|---|---|---|---|---|
| **Commercial*** | | | | | | |
| Vacant | 2.76 | 0.03 / 0.29 | 0.00 | 0.59 | 500 / 700 | 861 |
| Redevelopable | 2.10 | 0.03 / 0.29 | 0.12 | 0.14 | 500 / 700 | 232 |
| **Commercial Total** | **4.87** | **0.03 / 0.29** | **0.12** | **0.73** | **500 / 700** | **1,093** |
| **Mixed-Use** | | | | | | |
| Vacant | 0.00 | 0.08 | 0.00 | 0.00 | 500 | 0 |
| Redevelopable | 0.02 | 0.08 | 0.00 | 0.00 | 500 | 2 |
| **Mixed Use Total** | **0.02** | **0.08** | **0.00** | **0.00** | **500** | **3** |
| **Industrial** | | | | | | |
| Vacant | 0.00 | 0.00 | 0.00 | 0.00 | 0 | 0 |
| Redevelopable | 0.00 | 0.00 | 0.00 | 0.00 | 0 | 0 |
| **Industrial Total** | **0.00** | **0.00** | **0.00** | **0.00** | **0** | **0** |
| **City Total** | | | | | | |
| Commercial | 4.87 | 0.03 / 0.29 | 0.69 | 0.73 | 500 / 700 | 1,093 |
| Mixed Use | 0.02 | 0.08 | 0.91 | 0.00 | 500 | 3 |
| Industrial | 0.00 | 0.00 | 0.26 | 0.00 | 0 | 0 |
| *Job Capacity in Pipeline* | | | | | | *0* |
| **City Total** | **4.89** | **0.29** | **1.86** | **0.73** | **0 / 700** | **1,096** |

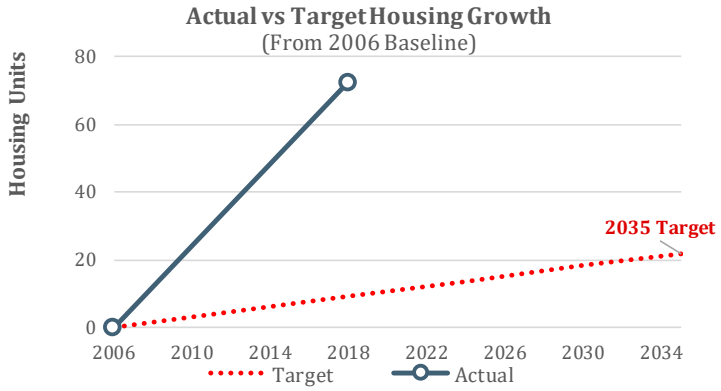
*Certain zones grouped as commercial allow for industrial use.

| Job Capacity by Assumed Density Level | # | % |
|---|---|---|
| Very Low Density | 1,096 | 100% |
| Low Density | 0 | 0% |
| Medium Low Density | 0 | 0% |
| Medium High Density | 0 | 0% |
| High Density | 0 | 0% |
| | | |
| *Capacity in Pipeline* | | *0* |
| **Total Capacity (jobs)** | | **1,096** |
| Remaining Target (2018-2035) | | 1,427 |
| **Surplus/Deficit Capacity (jobs)** | | **-331** |



# City of Medina

## Housing Growth and Residential Development Trends




| Medina Housing Growth Target: 2006-2035 | 22 |
|---|---|
| 2006 Estimated Housing Units | 1,162 |
| 2018 Estimated Housing Units | 1,234 |
| **Estimated Housing Growth** | **72** |
| Remaining 2035 Target | 0 |

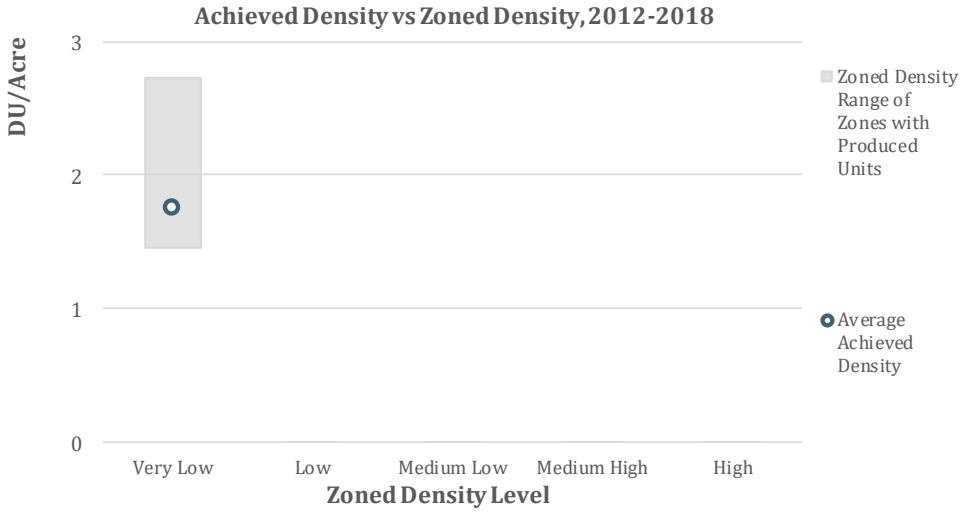
| % of Pace Needed to Achieve 2035 Housing Growth Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| 794.6% | 0.52% | Met Target |

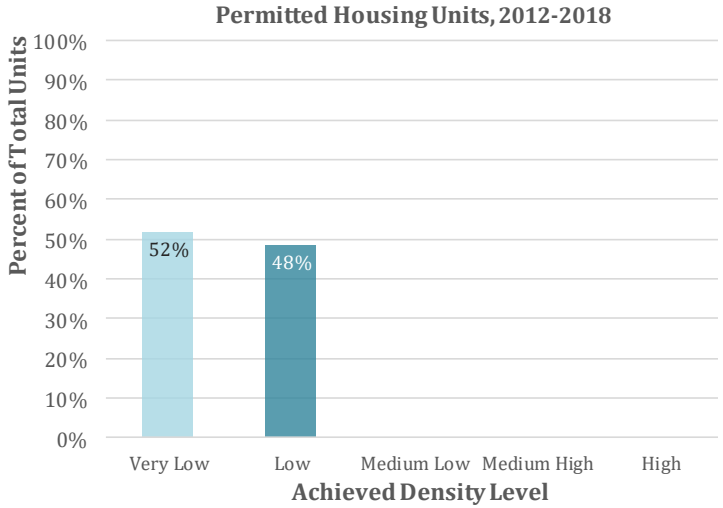
Since 2006, Medina has grown at 795% of the pace needed to achieve its 2035 housing growth target of 22 units. During this period, the total number of housing units in Medina grew by roughly 6%. Medina has achieved its 2035 housing growth target.

### Residential Achieved Densities

| Zoned Density (du/acre) | | Gross Area (acres) | Critical Areas (acres) | Public Purpose (acres) | ROWs (acres) | Net Area (acres) | Total Units | Achieved Density (DU/acre) |
|---|---|---|---|---|---|---|---|---|
| Very Low | 0 - 4 du/acre | 55.3 | 4.5 | 0.0 | 0.0 | 50.9 | 89 | 1.7 |
| Low | 4 - 10 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| Medium Low | 10 - 24 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| Medium High | 24 - 48 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| High | 48 & up du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| | Total | 55.3 | 4.5 | 0.0 | 0.0 | 50.9 | 89 | 1.7 |

| Achieved Density Level | Net Area (acres) | Total Units |
|---|---|---|
| Very Low | 40.8 | 46 |
| Low | 10.0 | 43 |
| Medium Low | 0.0 | 0 |
| Medium High | 0.0 | 0 |
| High | 0.0 | 0 |
| Total | 50.9 | 89 |



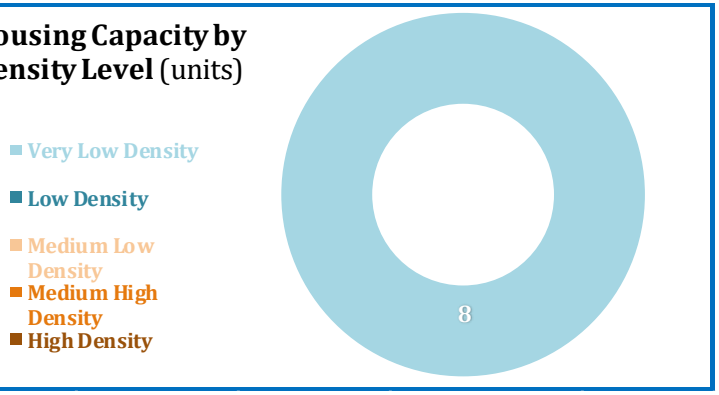



## Medina - Residential Land Supply and Capacity

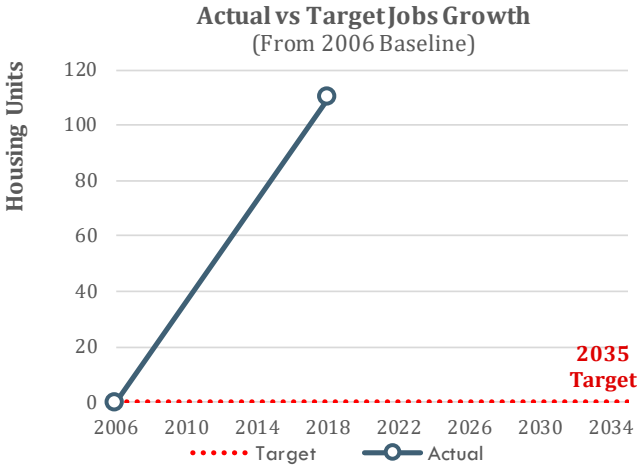
| Assumed Density Level | Vacant/ Redevelopable | Gross Acres | Critical Areas | Infrastructure Constrained Area | ROW & Public Purpose Discount | Market Factor (low/high) | Net Available Acres | Assumed Densities (low/high - units/acre) | Net Capacity (units) |
|---|---|---|---|---|---|---|---|---|---|
| Very Low Density | Vacant Subtotal | | | | 0.50 | 10.0% - 10.0% | 4.00 | 3.0 | 7 |
| | Redev Subtotal | | | | 0.50 | 10.0% - 10.0% | 4.00 | 3.0 | 1 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 1.00 | | 8.00 | | **8** |
| Low Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | | **0** |
| Medium Low Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | | **0** |
| Medium High Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | | **0** |
| High Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | | **0** |
| All Zones | Vacant Total | | | | 0.50 | | 4.00 | | 7 |
| | Redev Total | | | | 0.50 | | 4.00 | | 1 |
| | **Total** | **0.00** | **0.00** | **0.00** | **1.00** | | **8.00** | | **8** |

| Capacity (units) | |
|---|---|
| Very Low Density Zones | 8 |
| Low Density Zones | 0 |
| Medium Low Density Zones | 0 |
| Medium High Density Zones | 0 |
| High Density Zones | 0 |
| *Capacity in Pipeline* | *0* |
| **Total Capacity (Units)** | **8** |
| Remaining Target (2018-2035) | 0 |
| **Surplus/Deficit Capacity (Units)** | **8** |

**Housing Capacity by Density Level** (units)



# Medina - Employment Growth and Commercial/Industrial Development Trends




| Medina Jobs Growth Target: 2006-2035 | 0 |
|---|---|
| 2006 Jobs (PSRC) | 409 |
| 2018 Jobs (PSRC) | 519 |
| **Total Jobs Growth** | **110** |
| **Remaining 2035 Target** | **Not Applicable** |

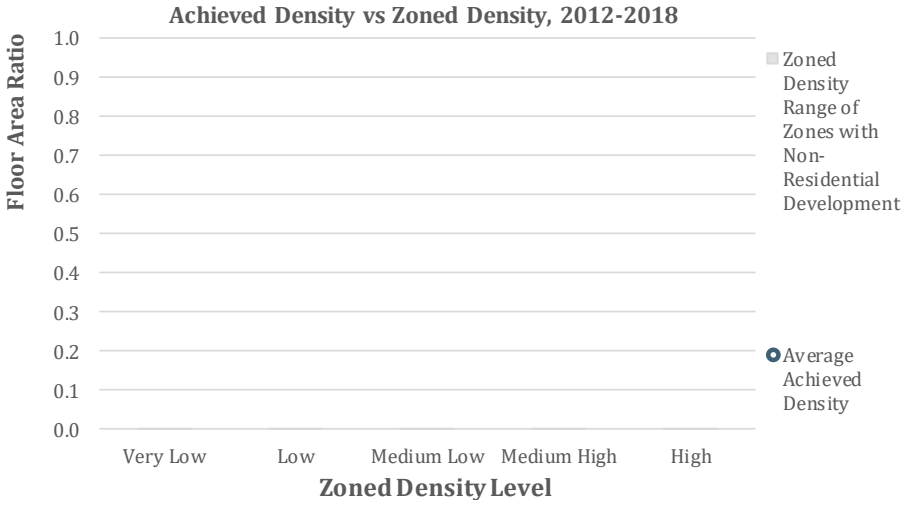
| % of Pace Needed to Achieve 2035 Jobs Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| **Not Applicable** | **2.24%** | **Not Applicable** |

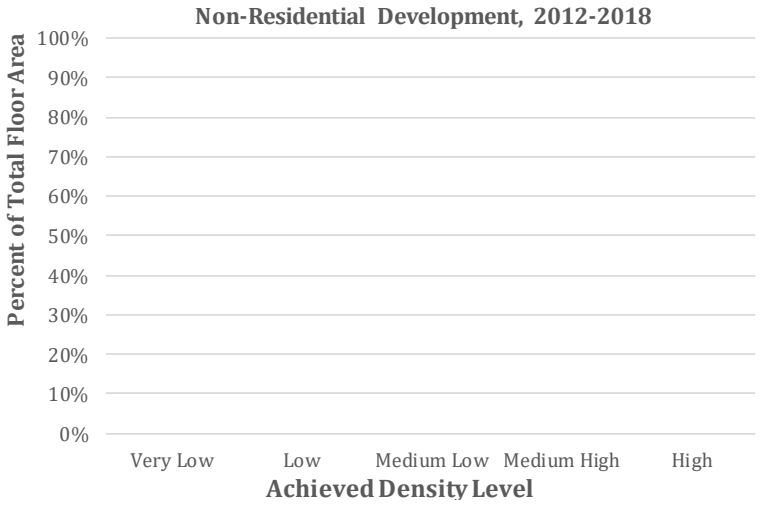
Since 2006, the total number of jobs in Medina grew by roughly 2%. There is no 2035 jobs growth target.

## Non-Residential Achieved Densities

| Zoned Density (FAR) | | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|---|
| **Very Low** | 0 - 0.35 FAR | 0 | 0 | |
| **Low** | 0.35 - 0.5 FAR | 0 | 0 | |
| **Medium Low** | 0.5 - 1.0 FAR | 0 | 0 | |
| **Medium High** | 1.0 - 3.0 FAR | 0 | 0 | |
| **High** | 3.0 & up FAR | 0 | 0 | |
| | **Total** | **0** | **0** | |

| Achieved Density Level | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|
| **Very Low** | 0 | 0 | **0.0** |
| **Low** | 0 | 0 | **0.0** |
| **Medium Low** | 0 | 0 | **0.0** |
| **Medium High** | 0 | 0 | **0.0** |
| **High** | 0 | 0 | **0.0** |
| **Total** | **0** | **0** | **0.0** |



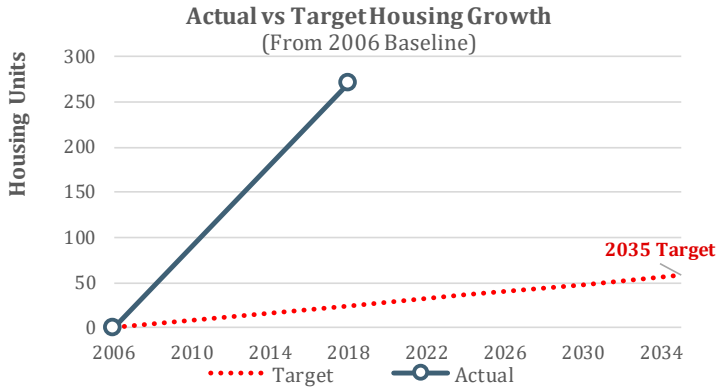



## Medina - Commercial/Industrial Land Supply and Job Capacity

(no job capacity in Medina)

# City of Milton

## Housing Growth and Residential Development Trends




| Milton Housing Growth Target: 2006-2035 | 58 |
|---|---|
| 2006 Estimated Housing Units | 337 |
| 2018 Estimated Housing Units | 608 |
| **Estimated Housing Growth** | **271** |
| Remaining 2035 Target | 0 |

| % of Pace Needed to Achieve 2035 Housing Growth Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| 1128.6% | 6.70% | Met Target |

Since 2006, Milton has grown at 1129% of the pace needed to achieve its 2035 housing growth target of 58 units. During this period, the total number of housing units in Milton grew by roughly 80%. Milton has achieved its 2035 housing growth target.

### Residential Achieved Densities

| Zoned Density (du/acre) | | Gross Area (acres) | Critical Areas (acres) | Public Purpose (acres) | ROWs (acres) | Net Area (acres) | Total Units | Achieved Density (DU/acre) |
|---|---|---|---|---|---|---|---|---|
| Very Low | 0 - 4 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| Low | 4 - 10 du/acre | 14.0 | 0.0 | 0.0 | 0.0 | 14.0 | 1 | **0.1** |
| Medium Low | 10 - 24 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| Medium High | 24 - 48 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| High | 48 & up du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| | **Total** | **14.0** | **0.0** | **0.0** | **0.0** | **14.0** | **1** | **0.1** |

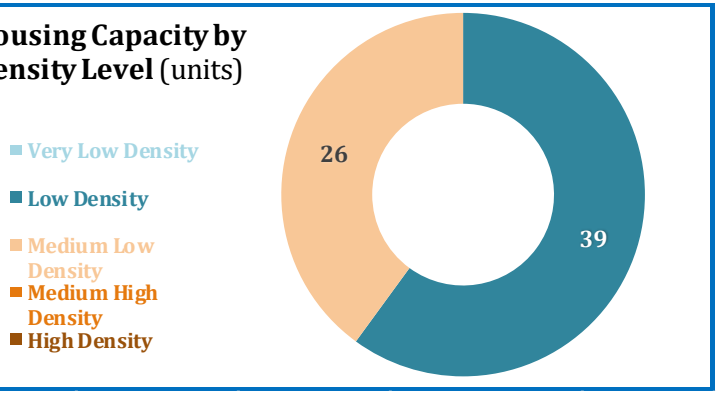
| Achieved Density Level | Net Area (acres) | Total Units |
|---|---|---|
| Very Low | 14.0 | 1 |
| Low | 0.0 | 0 |
| Medium Low | 0.0 | 0 |
| Medium High | 0.0 | 0 |
| High | 0.0 | 0 |
| **Total** | **14.0** | **1** |

## Milton - Residential Land Supply and Capacity

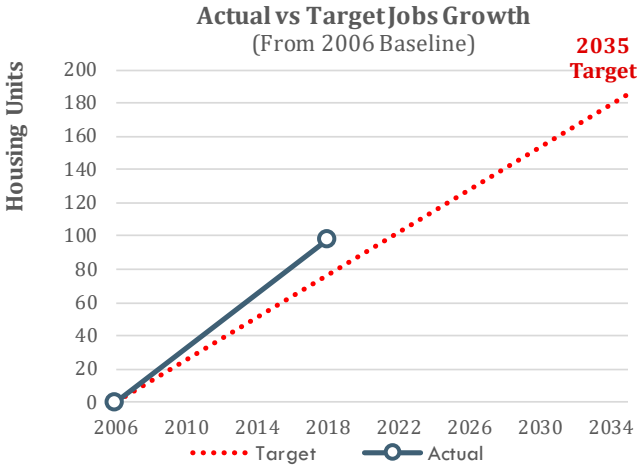
| Assumed Density Level | Vacant/ Redevelopable | Gross Acres | Critical Areas | Infrastructure Constrained Area | ROW & Public Purpose Discount | Market Factor (low/high) | Net Available Acres | Assumed Densities (low/high - units/acre) | Net Capacity (units) |
|---|---|---|---|---|---|---|---|---|---|
| Very Low Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | **Subtotal** | 45.36 | 45.36 | 0.00 | 0.00 | | 0.00 | | **0** |
| Low Density | Vacant Subtotal | | | | 0.07 | 0.0% - 0.0% | 0.44 | 5.4 | 2 |
| | Redev Subtotal | | | | 1.08 | 0.0% - 0.0% | 7.22 | 5.4 | 37 |
| | **Subtotal** | 16.88 | 8.07 | 0.00 | 1.14 | | 7.66 | | **39** |
| Medium Low Density | Vacant Subtotal | | | | 0.10 | 0.0% - 0.0% | 0.70 | 12.0 | 8 |
| | Redev Subtotal | | | | 0.25 | 0.0% - 0.0% | 1.65 | 12.0 | 18 |
| | **Subtotal** | 3.84 | 1.09 | 0.00 | 0.35 | | 2.35 | | **26** |
| Medium High Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | | **0** |
| High Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | | **0** |
| All Zones | Vacant Total | | | | 0.17 | | 1.13 | | 11 |
| | Redev Total | | | | 1.33 | | 8.87 | | 55 |
| | **Total** | **66.09** | **54.52** | **0.00** | **1.50** | | **10.01** | | **66** |

| Capacity (units) | |
|---|---|
| Very Low Density Zones | 0 |
| Low Density Zones | 39 |
| Medium Low Density Zones | 26 |
| Medium High Density Zones | 0 |
| High Density Zones | 0 |
| *Capacity in Pipeline* | *0* |
| **Total Capacity (Units)** | **66** |
| Remaining Target (2018-2035) | 0 |
| **Surplus/Deficit Capacity (Units)** | **66** |

**Housing Capacity by Density Level** (units)



# Milton - Employment Growth and Commercial/Industrial Development Trends




| Milton Jobs Growth Target: 2006-2035 | 186 |
|---|---|
| 2006 Jobs (PSRC) | 22 |
| 2018 Jobs (PSRC) | 120 |
| **Total Jobs Growth** | **98** |
| Remaining 2035 Target | 88 |

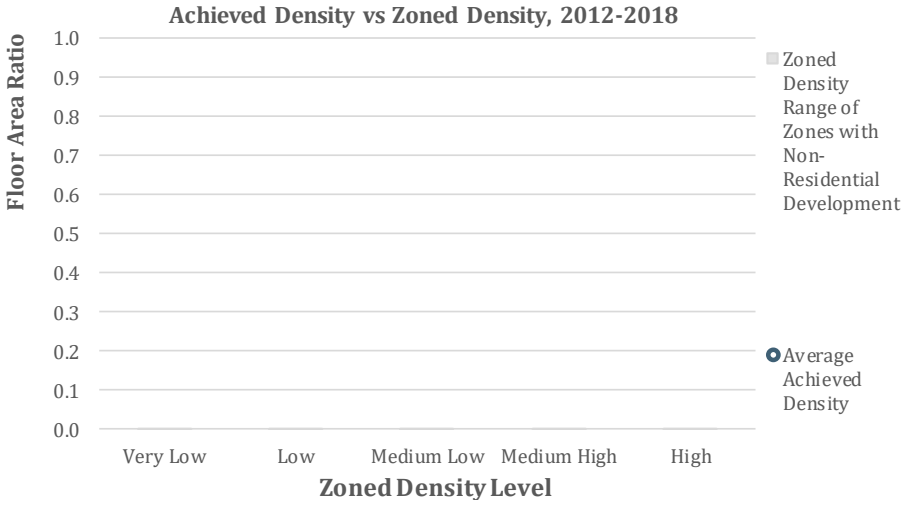
| % of Pace Needed to Achieve 2035 Jobs Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| 127.6% | 37.12% | 4.29% |

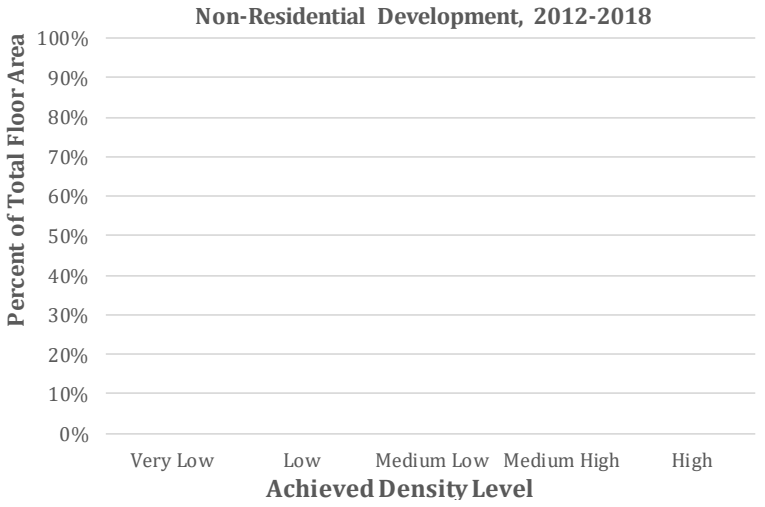
Since 2006, Milton has grown at 128% of the pace needed to achieve its 2035 jobs growth target of 186 units. During this period, the total number of jobs in Milton grew by roughly 445%. At this current rate, Milton is over the pace needed to meet its 2035 jobs growth target, and needs to grow at an annual rate of 4.3% to reach its remaining target by 2035.

## Non-Residential Achieved Densities

| Zoned Density (FAR) | | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|---|
| Very Low | 0 - 0.35 FAR | 0 | 0 | |
| Low | 0.35 - 0.5 FAR | 0 | 0 | |
| Medium Low | 0.5 - 1.0 FAR | 0 | 0 | |
| Medium High | 1.0 - 3.0 FAR | 0 | 0 | |
| High | 3.0 & up FAR | 0 | 0 | |
| | Total | 0 | 0 | |

| Achieved Density Level | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|
| Very Low | 0 | 0 | 0.0 |
| Low | 0 | 0 | 0.0 |
| Medium Low | 0 | 0 | 0.0 |
| Medium High | 0 | 0 | 0.0 |
| High | 0 | 0 | 0.0 |
| Total | 0 | 0 | 0.0 |



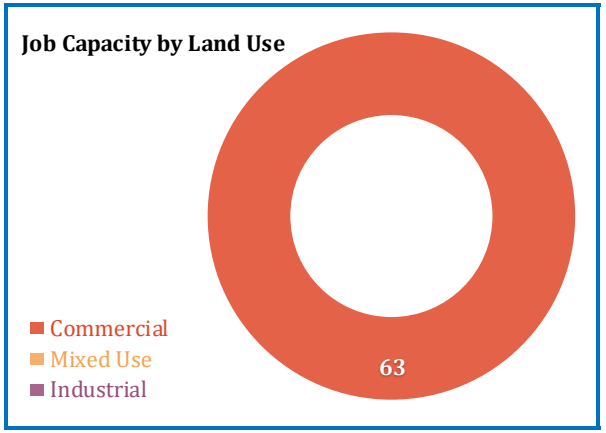



## Milton - Commercial/Industrial Land Supply and Job Capacity

| Land Supply | Gross Area (acres) | Critical Areas (acres) | ROWs (acres) | Public Purpose (acres) | Initial Land Supply | Market Factor | Buildable Area (acres) |
|---|---|---|---|---|---|---|---|
| **Vacant / Redev.** | | | | | | | |
| Commercial | 7.0 | 1.8 | 0.0 | 0.0 | 5.2 | 50% | 2.6 |
| Mixed Use | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0% | 0.0 |
| Industrial | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0% | 0.0 |
| **Non-Res Land Total** | **7.0** | **1.8** | **0.0** | **0.0** | **5.2** | | **2.6** |

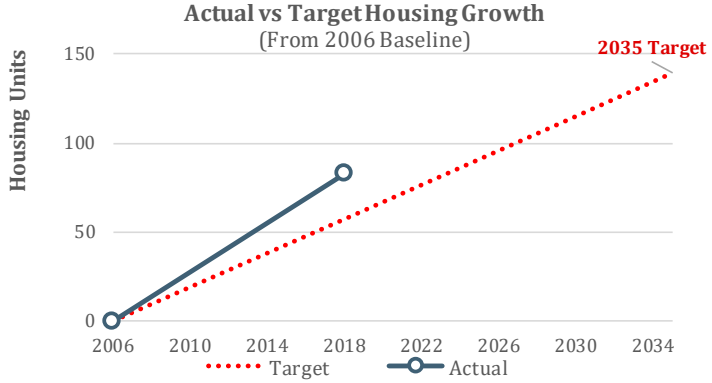
| Job Capacity by Land Use | Net Buildable Area (mil.sq.ft.) | Assumed Density Range (FAR) | Existing Floor Area (million sq.ft.) | Floor Area Capac. (million sq.ft.) | Sq. ft. per Job | Job Capacity |
|---|---|---|---|---|---|---|
| **Commercial** | | | | | | |
| Vacant | 0.10 | 0.25 | 0.00 | 0.02 | 450 | 53 |
| Redevelopable | 0.02 | 0.25 | 0.00 | 0.00 | 450 | 10 |
| **Commercial Total** | **0.11** | **0.25** | **0.00** | **0.03** | **450** | **63** |
| **Mixed-Use** | | | | | | |
| Vacant | 0.00 | 0.00 | 0.00 | 0.00 | 0 | 0 |
| Redevelopable | 0.00 | 0.00 | 0.00 | 0.00 | 0 | 0 |
| **Mixed Use Total** | **0.00** | **0.00** | **0.00** | **0.00** | **0** | **0** |
| **Industrial** | | | | | | |
| Vacant | 0.00 | 0.00 | 0.00 | 0.00 | 0 | 0 |
| Redevelopable | 0.00 | 0.00 | 0.00 | 0.00 | 0 | 0 |
| **Industrial Total** | **0.00** | **0.00** | **0.00** | **0.00** | **0** | **0** |
| **City Total** | | | | | | |
| Commercial | 0.11 | 0.25 | 0.69 | 0.03 | 450 | 63 |
| Mixed Use | 0.00 | 0.00 | 0.91 | 0.00 | 0 | 0 |
| Industrial | 0.00 | 0.00 | 0.26 | 0.00 | 0 | 0 |
| *Job Capacity in Pipeline* | | | | | | *1,150* |
| **City Total** | **0.11** | **0.25** | **1.86** | **0.03** | **0 / 450** | **1,213** |

| Job Capacity by Assumed Density Level | # | % |
|---|---|---|
| Very Low Density | 63 | 100% |
| Low Density | 0 | 0% |
| Medium Low Density | 0 | 0% |
| Medium High Density | 0 | 0% |
| High Density | 0 | 0% |
| | | |
| *Capacity in Pipeline* | | *1,150* |
| **Total Capacity (jobs)** | | **1,213** |
| Remaining Target (2018-2035) | | 88 |
| **Surplus/Deficit Capacity (jobs)** | | **1,125** |



# City of Normandy Park

## Housing Growth and Residential Development Trends




| Normandy Park Housing Growth Target: 2006-2035 | 139 |
|---|---|
| 2006 Estimated Housing Units | 2,794 |
| 2018 Estimated Housing Units | 2,877 |
| **Estimated Housing Growth** | **83** |
| **Remaining 2035 Target** | **56** |

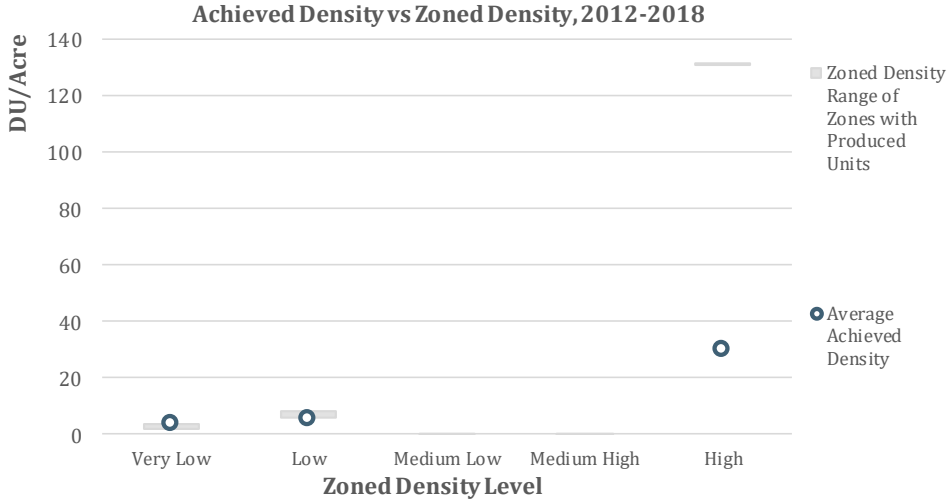
| % of Pace Needed to Achieve 2035 Housing Growth Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| 143.8% | 0.25% | 0.12% |

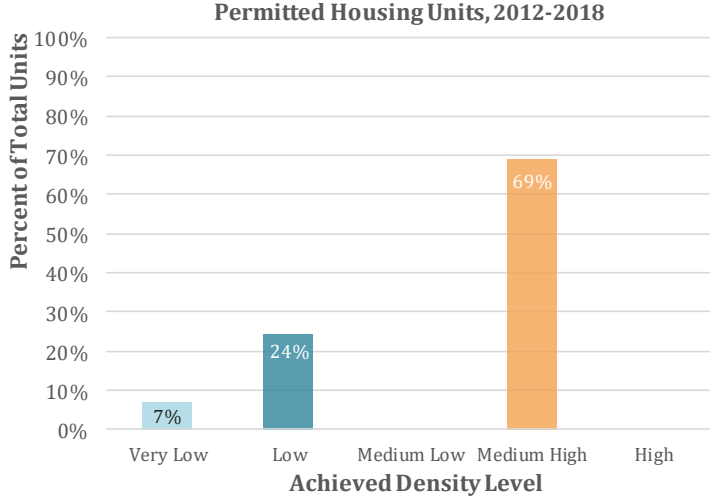
Since 2006, Normandy Park has grown at 144% of the pace needed to achieve its 2035 housing growth target of 139 units. During this period, the total number of housing units in Normandy Park grew by roughly 3%. At this current rate, Normandy Park is over the production pace needed to meet its 2035 growth target, and needs to grow at an annual rate of 0.1% to reach its remaining target by 2035.

### Residential Achieved Densities

| Zoned Density (du/acre) | | Gross Area (acres) | Critical Areas (acres) | Public Purpose (acres) | ROWs (acres) | Net Area (acres) | Total Units | Achieved Density (DU/acre) |
|---|---|---|---|---|---|---|---|---|
| Very Low | 0 - 4 du/acre | 6.5 | 4.6 | 0.0 | 0.0 | 1.9 | 7 | **3.7** |
| Low | 4 - 10 du/acre | 0.4 | 0.0 | 0.0 | 0.0 | 0.4 | 2 | **5.0** |
| Medium Low | 10 - 24 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| Medium High | 24 - 48 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| High | 48 & up du/acre | 1.7 | 0.0 | 1.0 | 0.0 | 0.7 | 20 | **29.5** |
| | **Total** | **8.5** | **4.6** | **1.0** | **0.0** | **3.0** | **29** | **9.7** |

| Achieved Density Level | Net Area (acres) | Total Units |
|---|---|---|
| Very Low | 1.0 | 2 |
| Low | 1.3 | 7 |
| Medium Low | 0.0 | 0 |
| Medium High | 0.7 | 20 |
| High | 0.0 | 0 |
| **Total** | **3.0** | **29** |



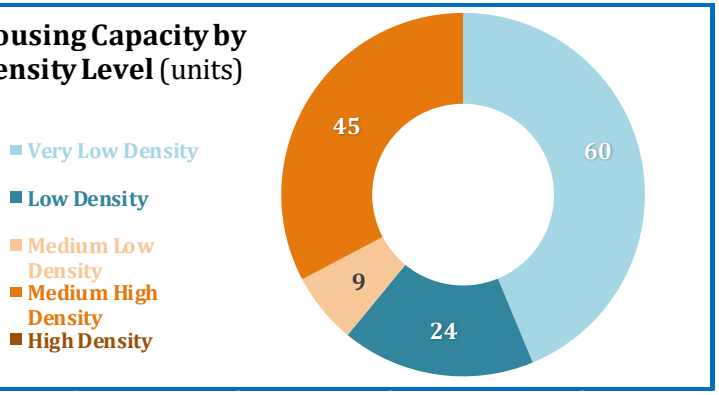



## Normandy Park - Residential Land Supply and Capacity

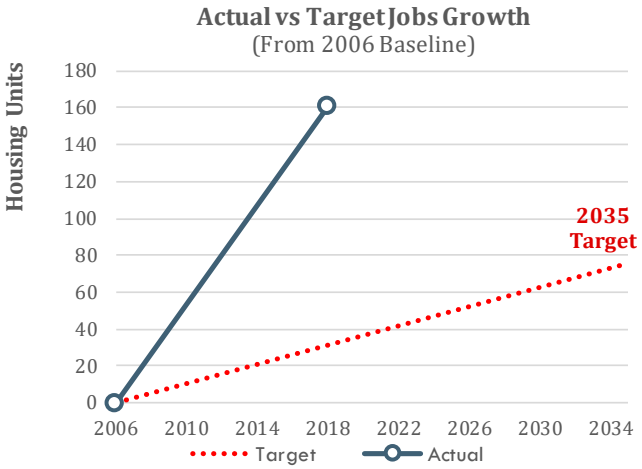
| Assumed Density Level | Vacant/ Redevelopable | Gross Acres | Critical Areas | Infrastructure Constrained Area | ROW & Public Purpose Discount | Market Factor (low/high) | Net Available Acres | Assumed Densities (low/high - units/acre) | Net Capacity (units) |
|---|---|---|---|---|---|---|---|---|---|
| **Very Low Density** | Vacant Subtotal | | | | 9.22 | 41.0% - 41.0% | 13.92 | 2.0 / 3.3 | 37 |
| | Redev Subtotal | | | | 17.16 | 41.0% - 41.0% | 25.93 | 2.0 / 3.3 | 23 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 26.38 | | 39.85 | | **60** |
| **Low Density** | Vacant Subtotal | | | | 0.55 | 41.0% - 41.0% | 0.84 | 5.0 / 8.0 | 4 |
| | Redev Subtotal | | | | 3.15 | 41.0% - 41.0% | 4.77 | 5.0 / 8.0 | 19 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 3.71 | | 5.60 | | **24** |
| **Medium Low Density** | Vacant Subtotal | | | | 0.00 | 10.0% - 10.0% | 0.00 | 18.0 | 0 |
| | Redev Subtotal | | | | 0.17 | 10.0% - 10.0% | 0.48 | 18.0 | 9 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.17 | | 0.48 | | **9** |
| **Medium High Density** | Vacant Subtotal | | | | 0.00 | 10.0% - 10.0% | 0.01 | 24.0 / 29.0 | 0 |
| | Redev Subtotal | | | | 0.08 | 10.0% - 10.0% | 1.57 | 24.0 / 29.0 | 44 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.09 | | 1.58 | | **45** |
| **High Density** | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | | **0** |
| **All Zones** | Vacant Total | | | | 9.77 | | 14.77 | | 41 |
| | Redev Total | | | | 20.57 | | 32.74 | | 96 |
| | **Total** | **0.00** | **0.00** | **0.00** | **30.34** | | **47.51** | | **137** |

| Capacity (units) | |
|---|---|
| Very Low Density Zones | 60 |
| Low Density Zones | 24 |
| Medium Low Density Zones | 9 |
| Medium High Density Zones | 45 |
| High Density Zones | 0 |
| *Capacity in Pipeline* | *16* |
| **Total Capacity (Units)** | **153** |
| Remaining Target (2018-2035) | 56 |
| **Surplus/Deficit Capacity (Units)** | **96** |

**Housing Capacity by Density Level** (units)



# Normandy Park - Employment Growth and Commercial/Industrial Development Trends




| Normandy Park Jobs Growth Target: 2006-2035 | 75 |
|---|---|
| 2006 Jobs (PSRC) | 773 |
| 2018 Jobs (PSRC) | 934 |
| **Total Jobs Growth** | **161** |
| **Remaining 2035 Target** | **0** |

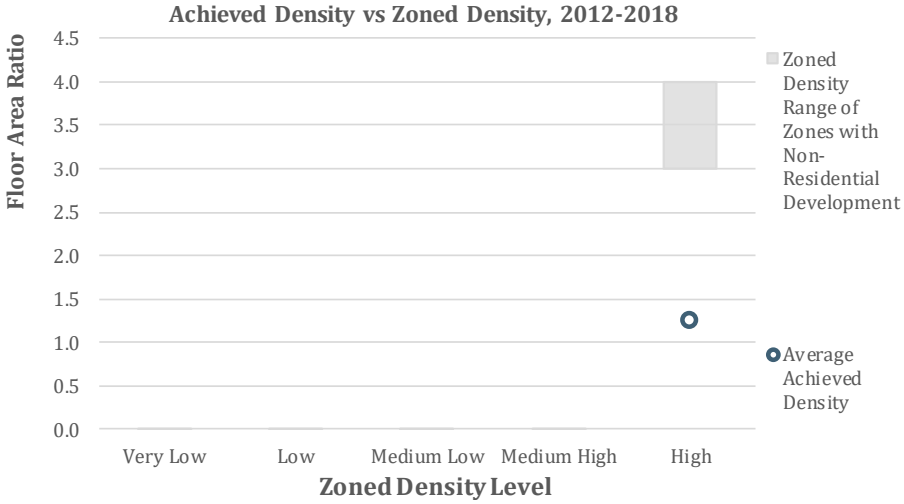
| % of Pace Needed to Achieve 2035 Jobs Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| **516.0%** | **1.74%** | **Met Target** |

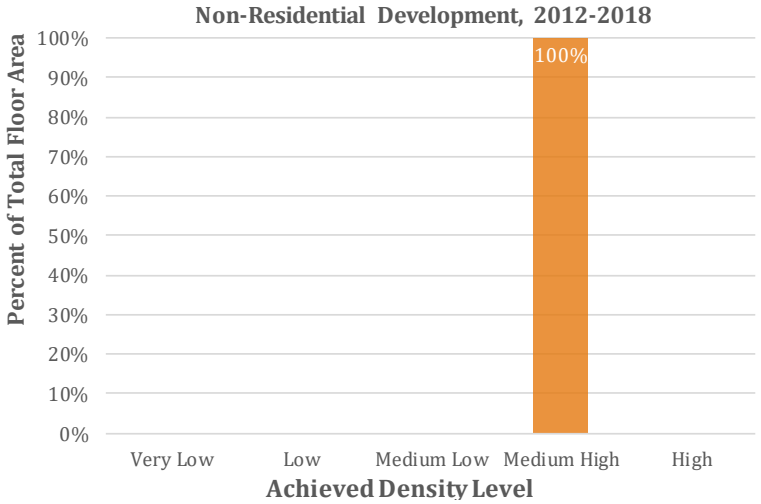
Since 2006, Normandy Park has grown at 516% of the pace needed to achieve its 2035 jobs growth target of 75 units. During this period, the total number of jobs in Normandy Park grew by roughly 21%. Normandy Park has achieved its 2035 jobs growth target.

## Non-Residential Achieved Densities

| Zoned Density (FAR) | | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|---|
| **Very Low** | 0 - 0.35 FAR | 0 | 0 | |
| **Low** | 0.35 - 0.5 FAR | 0 | 0 | |
| **Medium Low** | 0.5 - 1.0 FAR | 0 | 0 | |
| **Medium High** | 1.0 - 3.0 FAR | 0 | 0 | |
| **High** | 3.0 & up FAR | 3,101 | 3,873 | **1.2** |
| | **Total** | **3,101** | **3,873** | **1.2** |

| Achieved Density Level | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|
| **Very Low** | 0 | 0 | **0.0** |
| **Low** | 0 | 0 | **0.0** |
| **Medium Low** | 0 | 0 | **0.0** |
| **Medium High** | 3,101 | 3,873 | **1.2** |
| **High** | 0 | 0 | **0.0** |
| **Total** | **3,101** | **3,873** | **1.2** |



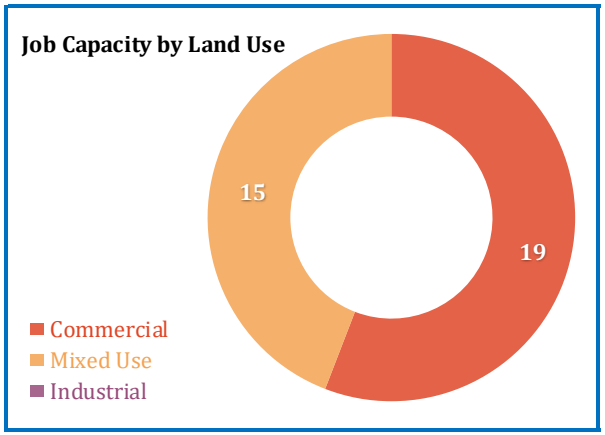



## Normandy Park - Commercial/Industrial Land Supply and Job Capacity

| Land Supply | Gross Area (acres) | Critical Areas (acres) | ROWs (acres) | Public Purpose (acres) | Initial Land Supply | Market Factor | Buildable Area (acres) |
|---|---|---|---|---|---|---|---|
| **Vacant / Redev.** | | | | | | | |
| Commercial | 0.5 | 0.0 | 0.0 | 0.0 | 0.5 | 11% | 0.4 |
| Mixed Use | 1.8 | 0.0 | 0.1 | 0.0 | 1.7 | 10% | 1.6 |
| Industrial | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0% | 0.0 |
| **Non-Res Land Total** | **2.3** | **0.0** | **0.1** | **0.0** | **2.2** | | **2.0** |

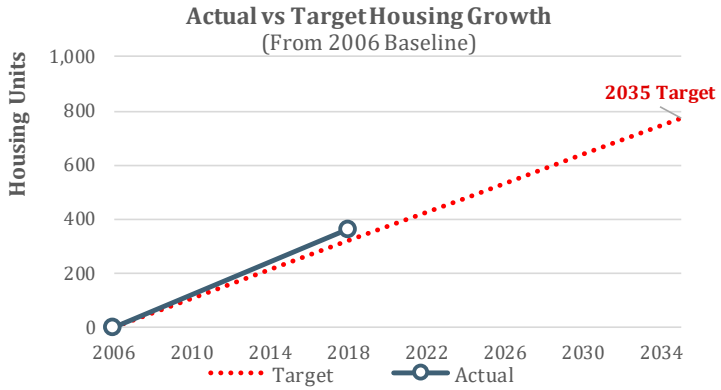
| Job Capacity by Land Use | Net Buildable Area (mil.sq.ft.) | Assumed Density Range (FAR) | Existing Floor Area (million sq.ft.) | Floor Area Capac. (million sq.ft.) | Sq. ft. per Job | Job Capacity |
|---|---|---|---|---|---|---|
| **Commercial** | | | | | | |
| Vacant | 0.02 | 0.28 | 0.00 | 0.00 | 250 | 19 |
| Redevelopable | 0.00 | 0.28 | 0.00 | 0.00 | 250 | 0 |
| **Commercial Total** | **0.02** | **0.28** | **0.00** | **0.00** | **250** | **19** |
| **Mixed-Use** | | | | | | |
| Vacant | 0.00 | 0.15 | 0.00 | 0.00 | 250 | 0 |
| Redevelopable | 0.07 | 0.15 | 0.01 | 0.00 | 250 | 15 |
| **Mixed Use Total** | **0.07** | **0.15** | **0.01** | **0.00** | **250** | **15** |
| **Industrial** | | | | | | |
| Vacant | 0.00 | 0.00 | 0.00 | 0.00 | 0 | 0 |
| Redevelopable | 0.00 | 0.00 | 0.00 | 0.00 | 0 | 0 |
| **Industrial Total** | **0.00** | **0.00** | **0.00** | **0.00** | **0** | **0** |
| **City Total** | | | | | | |
| Commercial | 0.02 | 0.28 | 0.69 | 0.00 | 250 | 19 |
| Mixed Use | 0.07 | 0.15 | 0.91 | 0.00 | 250 | 15 |
| Industrial | 0.00 | 0.00 | 0.26 | 0.00 | 0 | 0 |
| *Job Capacity in Pipeline* | | | | | | *0* |
| **City Total** | **0.09** | **0.28** | **1.86** | **0.01** | **0 / 250** | **35** |

| Job Capacity by Assumed Density Level | # | % |
|---|---|---|
| Very Low Density | 35 | 100% |
| Low Density | 0 | 0% |
| Medium Low Density | 0 | 0% |
| Medium High Density | 0 | 0% |
| High Density | 0 | 0% |
| | | |
| *Capacity in Pipeline* | | *0* |
| **Total Capacity (jobs)** | | **35** |
| Remaining Target (2018-2035) | | 0 |
| **Surplus/Deficit Capacity (jobs)** | | **35** |



# City of North Bend

## Housing Growth and Residential Development Trends




| North Bend Housing Growth Target: 2006-2035 | 771 |
|---|---|
| 2006 Estimated Housing Units | 3,352 |
| 2018 Estimated Housing Units | 3,712 |
| **Estimated Housing Growth** | **361** |
| **Remaining 2035 Target** | **411** |

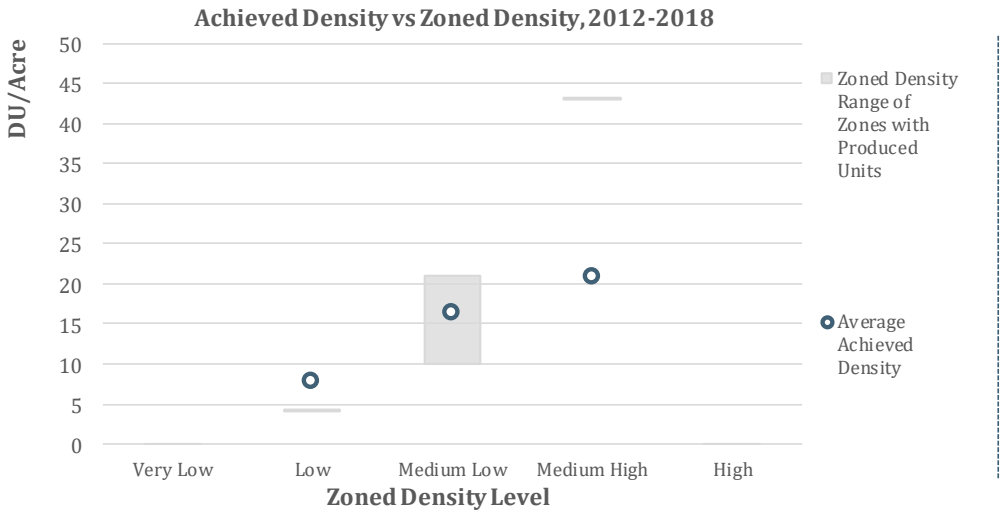
| % of Pace Needed to Achieve 2035 Housing Growth Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| 113.0% | 0.90% | 0.65% |

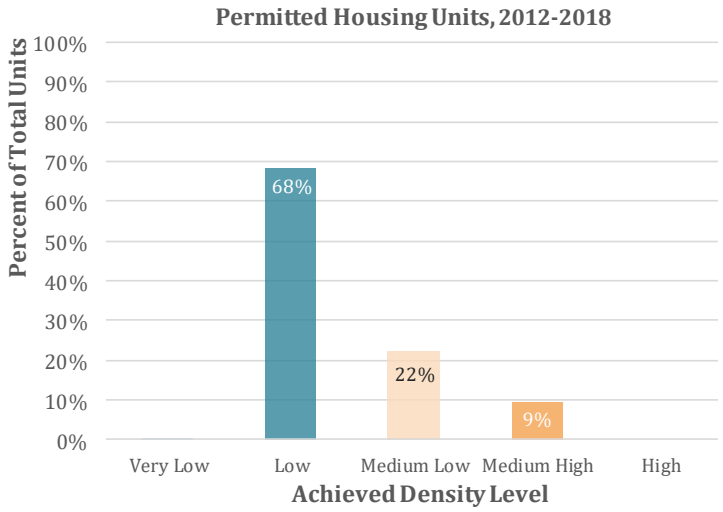
Since 2006, North Bend has grown at 113% of the pace needed to achieve its 2035 housing growth target of 771 units. During this period, the total number of housing units in North Bend grew by roughly 11%. At this current rate, North Bend is over the production pace needed to meet its 2035 growth target, and needs to grow at an annual rate of 0.7% to reach its remaining target by 2035.

### Residential Achieved Densities

| Zoned Density (du/acre) | | Gross Area (acres) | Critical Areas (acres) | Public Purpose (acres) | ROWs (acres) | Net Area (acres) | Total Units | Achieved Density (DU/acre) |
|---|---|---|---|---|---|---|---|---|
| **Very Low** | 0 - 4 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| **Low** | 4 - 10 du/acre | 159.3 | 26.0 | 23.7 | 32.9 | 76.7 | 592 | **7.7** |
| **Medium Low** | 10 - 24 du/acre | 18.5 | 0.0 | 3.1 | 3.5 | 11.9 | 194 | **16.3** |
| **Medium High** | 24 - 48 du/acre | 4.1 | 0.0 | 0.0 | 0.0 | 4.1 | 85 | **20.8** |
| **High** | 48 & up du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| | **Total** | **181.9** | **26.0** | **26.8** | **36.4** | **92.7** | **871** | **9.4** |

| Achieved Density Level | Net Area (acres) | Total Units |
|---|---|---|
| **Very Low** | 1.5 | 4 |
| **Low** | 76.7 | 592 |
| **Medium Low** | 11.9 | 194 |
| **Medium High** | 2.6 | 81 |
| **High** | 0.0 | 0 |
| **Total** | **92.7** | **871** |



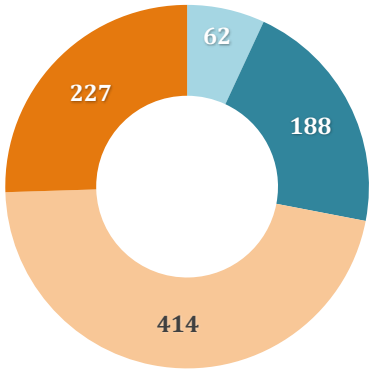



## North Bend - Residential Land Supply and Capacity

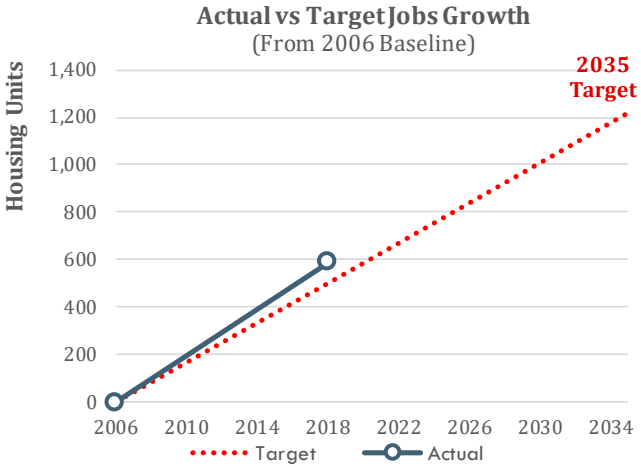
| Assumed Density Level | Vacant/ Redevelopable | Gross Acres | Critical Areas | Infrastructure Constrained Area | ROW & Public Purpose Discount | Market Factor (low/high) | Net Available Acres | Assumed Densities (low/high - units/acre) | Net Capacity (units) |
|---|---|---|---|---|---|---|---|---|---|
| Very Low Density | Vacant Subtotal | | | | 11.01 | 10.0% - 30.0% | 25.07 | 2.0 | 50 |
| | Redev Subtotal | | | | 12.23 | 10.0% - 30.0% | 33.94 | 2.0 | 12 |
| | **Subtotal** | 69.64 | 5.56 | 0.00 | 23.24 | | 59.01 | | **62** |
| Low Density | Vacant Subtotal | | | | 1.81 | 10.0% - 10.0% | 5.58 | 4.0 | 22 |
| | Redev Subtotal | | | | 19.25 | 10.0% - 10.0% | 59.70 | 4.0 | 166 |
| | **Subtotal** | 388.92 | 76.23 | 175.49 | 21.06 | | 65.28 | | **188** |
| Medium Low Density | Vacant Subtotal | | | | 3.37 | 4.0% - 25.0% | 11.63 | 15.0 / 21.0 | 186 |
| | Redev Subtotal | | | | 4.68 | 4.0% - 25.0% | 15.77 | 15.0 / 16.0 | 228 |
| | **Subtotal** | 47.27 | 12.28 | 0.00 | 8.04 | | 27.40 | | **414** |
| Medium High Density | Vacant Subtotal | | | | 0.70 | 25.0% - 25.0% | 2.60 | 32.0 | 83 |
| | Redev Subtotal | | | | 1.30 | 25.0% - 25.0% | 4.78 | 32.0 | 144 |
| | **Subtotal** | 128.64 | 53.75 | 17.58 | 2.00 | | 7.38 | | **227** |
| High Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | | **0** |
| All Zones | Vacant Total | | | | 16.89 | | 44.88 | | 342 |
| | Redev Total | | | | 37.45 | | 114.20 | | 550 |
| | **Total** | **634.47** | **147.82** | **193.07** | **54.34** | | **159.07** | | **891** |

| Capacity (units) | |
|---|---|
| Very Low Density Zones | 62 |
| Low Density Zones | 188 |
| Medium Low Density Zones | 414 |
| Medium High Density Zones | 227 |
| High Density Zones | 0 |
| *Capacity in Pipeline* | *1,207* |
| **Total Capacity (Units)** | **2,098** |
| Remaining Target (2018-2035) | 411 |
| **Surplus/Deficit Capacity (Units)** | **1,687** |

**Housing Capacity by Density Level** (units)



# North Bend - Employment Growth and Commercial/Industrial Development Trends




| North Bend Jobs Growth Target: 2006-2035 | 1,218 |
|---|---|
| 2006 Jobs (PSRC) | 2,707 |
| 2018 Jobs (PSRC) | 3,297 |
| **Total Jobs Growth** | **590** |
| **Remaining 2035 Target** | **628** |

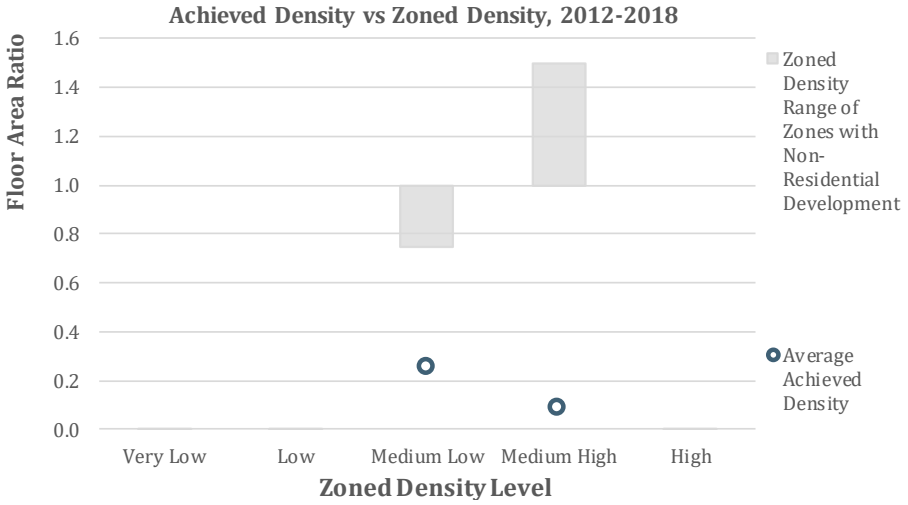
| % of Pace Needed to Achieve 2035 Jobs Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| **117.1%** | **1.82%** | **1.12%** |

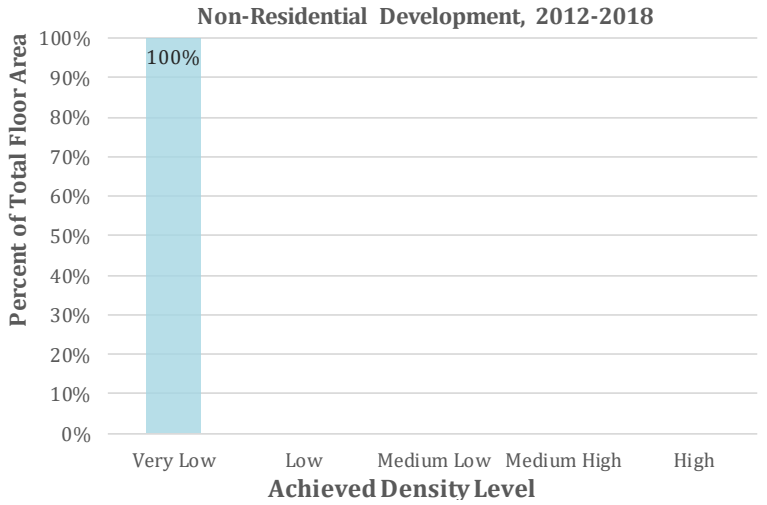
Since 2006, North Bend has grown at 117% of the pace needed to achieve its 2035 jobs growth target of 1,218 units. During this period, the total number of jobs in North Bend grew by roughly 22%. At this current rate, North Bend is over the pace needed to meet its 2035 jobs growth target, and needs to grow at an annual rate of 1.1% to reach its remaining target by 2035.

## Non-Residential Achieved Densities

| Zoned Density (FAR) | | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|---|
| **Very Low** | 0 - 0.35 FAR | 0 | 0 | |
| **Low** | 0.35 - 0.5 FAR | 0 | 0 | |
| **Medium Low** | 0.5 - 1.0 FAR | 1,634,066 | 413,860 | **0.3** |
| **Medium High** | 1.0 - 3.0 FAR | 1,122,230 | 97,851 | **0.1** |
| **High** | 3.0 & up FAR | 0 | 0 | |
| | **Total** | **2,756,296** | **511,711** | **0.2** |

| Achieved Density Level | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|
| **Very Low** | 2,756,296 | 511,711 | **0.2** |
| **Low** | 0 | 0 | **0.0** |
| **Medium Low** | 0 | 0 | **0.0** |
| **Medium High** | 0 | 0 | **0.0** |
| **High** | 0 | 0 | **0.0** |
| **Total** | **2,756,296** | **511,711** | **0.2** |



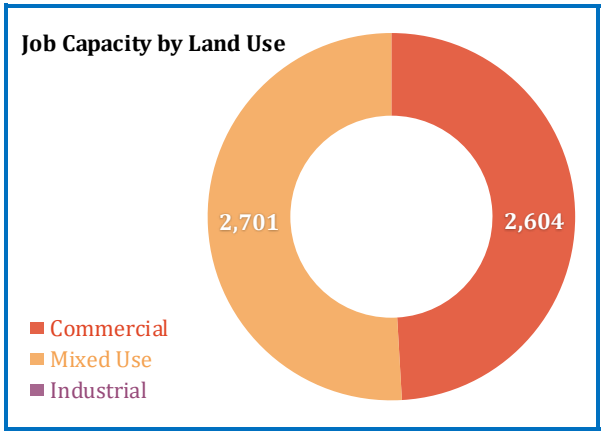
## North Bend - Commercial/Industrial Land Supply and Job Capacity

| Land Supply | Gross Area (acres) | Critical Areas (acres) | ROWs (acres) | Public Purpose (acres) | Initial Land Supply | Market Factor | Buildable Area (acres) |
|---|---|---|---|---|---|---|---|
| **Vacant / Redev.** | | | | | | | |
| Commercial | 129.1 | 89.5 | 3.2 | 3.2 | 33.3 | 20% | 25.4 |
| Mixed Use | 59.5 | 0.0 | 4.8 | 4.8 | 50.0 | 25% | 35.1 |
| Industrial | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0% | 0.0 |
| **Non-Res Land Total** | **188.7** | **89.5** | **7.9** | **16.0** | **167.9** | | **60.5** |

| Job Capacity by Land Use | Net Buildable Area (mil.sq.ft.) | Assumed Density Range (FAR) | Existing Floor Area (million sq.ft.) | Floor Area Capac. (million sq.ft.) | Sq. ft. per Job | Job Capacity |
|---|---|---|---|---|---|---|
| **Commercial*** | | | | | | |
| Vacant | 2.81 | 0.30 / 0.75 | 0.00 | 0.95 | 350 / 800 | 1,815 |
| Redevelopable | 0.89 | 0.30 / 0.75 | 0.03 | 0.33 | 350 / 800 | 789 |
| **Commercial Total** | **3.69** | **0.30 / 0.75** | **0.03** | **1.28** | **350 / 800** | **2,604** |
| **Mixed-Use** | | | | | | |
| Vacant | 1.02 | 0.75 / 1.50 | 0.01 | 0.79 | 300 / 500 | 1,682 |
| Redevelopable | 0.51 | 0.75 / 1.50 | 0.02 | 0.43 | 300 / 500 | 1019 |
| **Mixed Use Total** | **1.53** | **0.75 / 1.50** | **0.03** | **1.22** | **300 / 500** | **2,701** |
| **Industrial** | | | | | | |
| Vacant | 0.00 | 0.00 | 0.00 | 0.00 | 0 | 0 |
| Redevelopable | 0.00 | 0.00 | 0.00 | 0.00 | 0 | 0 |
| **Industrial Total** | **0.00** | **0.00** | **0.00** | **0.00** | **0** | **0** |
| **City Total** | | | | | | |
| Commercial | 3.69 | 0.30 / 0.75 | 0.69 | 1.28 | 350 / 800 | 2,604 |
| Mixed Use | 1.53 | 0.75 / 1.50 | 0.91 | 1.22 | 300 / 500 | 2,701 |
| Industrial | 0.00 | 0.00 | 0.26 | 0.00 | 0 | 0 |
| *Job Capacity in Pipeline* | | | | | | *453* |
| **City Total** | **5.22** | **1.50** | **1.86** | **2.51** | **0 / 800** | **5,759** |

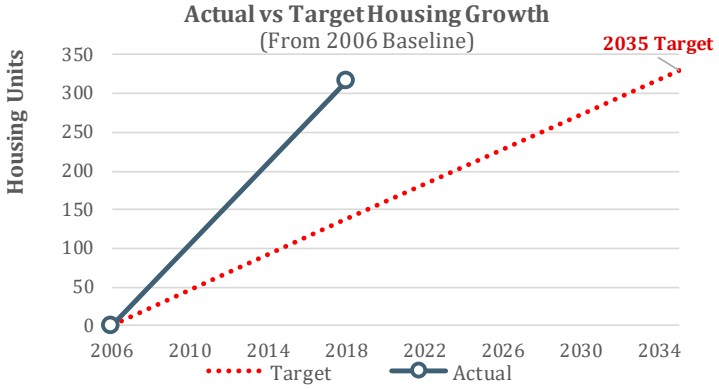
*Certain zones grouped as commercial allow for industrial use.

| Job Capacity by Assumed Density Level | # | % |
|---|---|---|
| Very Low Density | 1,234 | 23% |
| Low Density | 928 | 18% |
| Medium Low Density | 2,507 | 47% |
| Medium High Density | 636 | 12% |
| High Density | 0 | 0% |
| | | |
| *Capacity in Pipeline* | | *453* |
| **Total Capacity (jobs)** | | **5,759** |
| Remaining Target (2018-2035) | | 628 |
| **Surplus/Deficit Capacity (jobs)** | | **5,131** |



# City of Pacific

## Housing Growth and Residential Development Trends




| | |
|---|---|
| **Pacific Housing Growth Target: 2006-2035** | **331** |
| 2006 Estimated Housing Units | 2,146 |
| 2018 Estimated Housing Units | 2,462 |
| **Estimated Housing Growth** | **316** |
| **Remaining 2035 Target** | **15** |

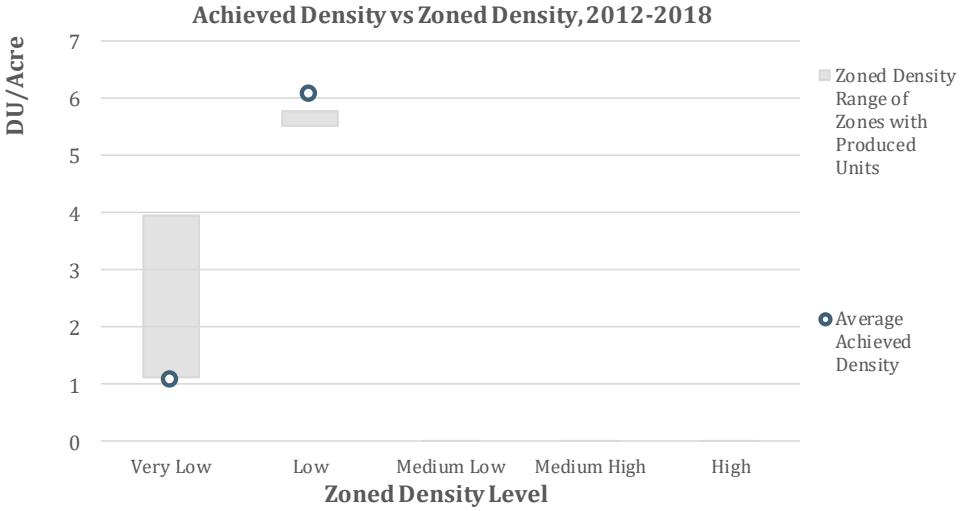
| % of Pace Needed to Achieve 2035 Housing Growth Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| 230.9% | 1.23% | 0.04% |

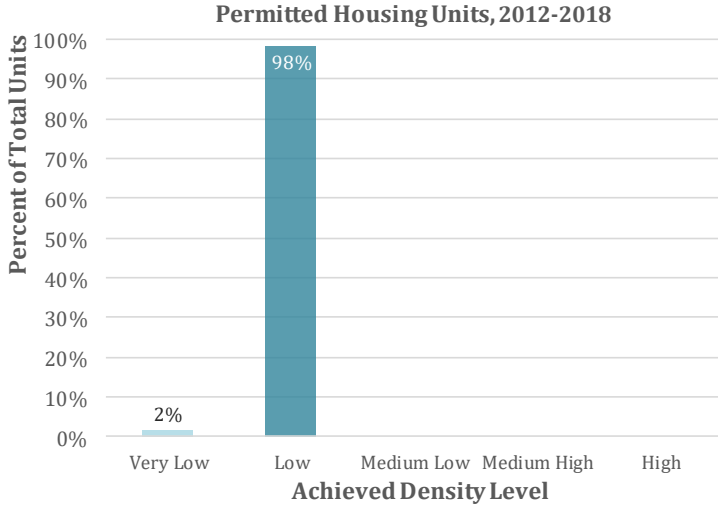
Since 2006, Pacific has grown at 231% of the pace needed to achieve its 2035 housing growth target of 331 units. During this period, the total number of housing units in Pacific grew by roughly 15%. At this current rate, Pacific is over the production pace needed to meet its 2035 growth target, and needs to grow at an annual rate of 0.04% to reach its remaining target by 2035.

### Residential Achieved Densities

| Zoned Density (du/acre) | | Gross Area (acres) | Critical Areas (acres) | Public Purpose (acres) | ROWs (acres) | Net Area (acres) | Total Units | Achieved Density (DU/acre) |
|---|---|---|---|---|---|---|---|---|
| **Very Low** | 0 - 4 du/acre | 3.6 | 1.7 | 0.0 | 0.0 | 1.9 | 2 | **1.1** |
| **Low** | 4 - 10 du/acre | 20.3 | 0.9 | 0.0 | 0.0 | 19.4 | 117 | **6.0** |
| **Medium Low** | 10 - 24 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| **Medium High** | 24 - 48 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| **High** | 48 & up du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| | **Total** | **23.9** | **2.6** | **0.0** | **0.0** | **21.3** | **119** | **5.6** |

| Achieved Density Level | Net Area (acres) | Total Units |
|---|---|---|
| **Very Low** | 1.9 | 2 |
| **Low** | 19.4 | 117 |
| **Medium Low** | 0.0 | 0 |
| **Medium High** | 0.0 | 0 |
| **High** | 0.0 | 0 |
| **Total** | **21.3** | **119** |



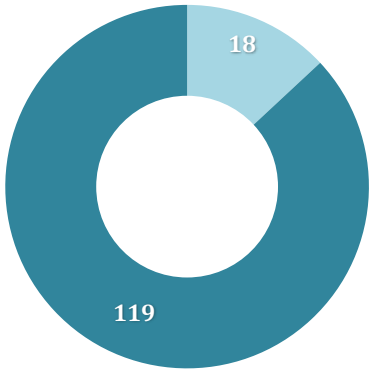



## Pacific - Residential Land Supply and Capacity

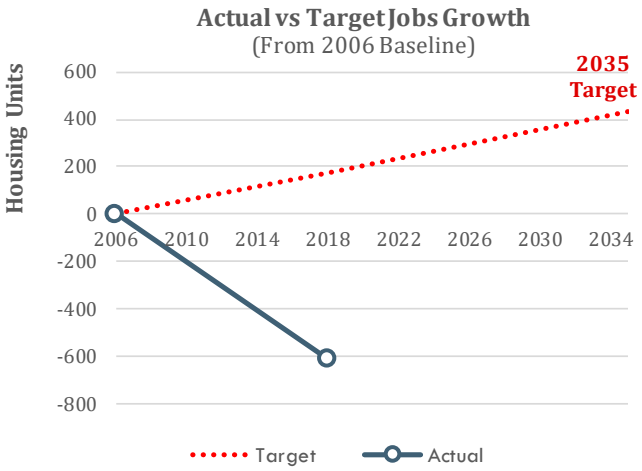
| Assumed Density Level | Vacant/ Redevelopable | Gross Acres | Critical Areas | Infrastructure Constrained Area | ROW & Public Purpose Discount | Market Factor (low/high) | Net Available Acres | Assumed Densities (low/high - units/acre) | Net Capacity (units) |
|---|---|---|---|---|---|---|---|---|---|
| Very Low Density | Vacant Subtotal | | | | 4.19 | 30.0% - 50.0% | 10.16 | 1.1 / 4.0 | 13 |
| | Redev Subtotal | | | | 3.97 | 30.0% - 50.0% | 9.85 | 1.1 / 4.0 | 5 |
| | **Subtotal** | 68.75 | 27.94 | 0.00 | 8.16 | | 20.01 | | **18** |
| Low Density | Vacant Subtotal | | | | 1.70 | 28.0% - 28.0% | 4.43 | 5.9 | 26 |
| | Redev Subtotal | | | | 11.64 | 28.0% - 28.0% | 30.27 | 5.9 | 93 |
| | **Subtotal** | 86.40 | 19.68 | 0.00 | 13.35 | | 34.70 | | **119** |
| Medium Low Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | | **0** |
| Medium High Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | | **0** |
| High Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | | **0** |
| All Zones | Vacant Total | | | | 5.90 | | 14.59 | | 40 |
| | Redev Total | | | | 15.61 | | 40.12 | | 98 |
| | **Total** | **155.15** | **47.62** | **0.00** | **21.51** | | **54.71** | | **137** |

| Capacity (units) | |
|---|---|
| Very Low Density Zones | 18 |
| Low Density Zones | 119 |
| Medium Low Density Zones | 0 |
| Medium High Density Zones | 0 |
| High Density Zones | 0 |
| *Capacity in Pipeline* | *0* |
| **Total Capacity (Units)** | **137** |
| Remaining Target (2018-2035) | 15 |
| **Surplus/Deficit Capacity (Units)** | **123** |

**Housing Capacity by Density Level** (units)



# Pacific - Employment Growth and Commercial/Industrial Development Trends




| Pacific Jobs Growth Target: 2006-2035 | 429 |
|---|---|
| 2006 Jobs (PSRC) | 1,443 |
| 2018 Jobs (PSRC) | 834 |
| **Total Jobs Growth** | **-609** |
| **Remaining 2035 Target** | **1,038** |

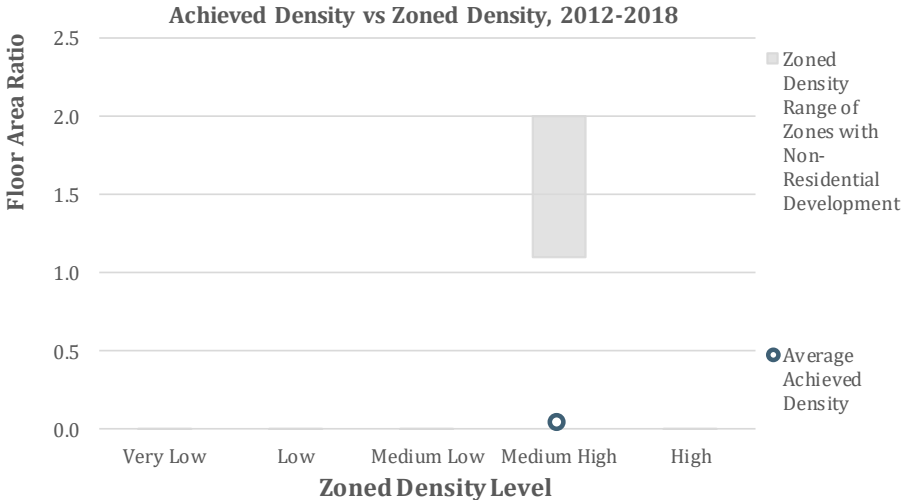
| % of Pace Needed to Achieve 2035 Jobs Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| -342.9% | -3.52% | 7.32% |

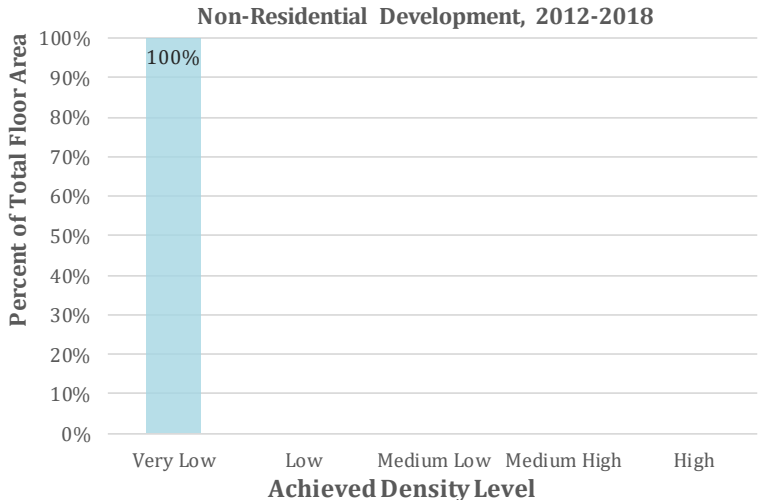
Since 2006, Pacific has grown at -343% of the pace needed to achieve its 2035 jobs growth target of 429 units. During this period, the total number of jobs in Pacific grew by roughly -42%. At this current rate, Pacific is under the pace needed to meet its 2035 jobs growth target, and needs to grow at an annual rate of 7.3% to reach its remaining target by 2035.

## Non-Residential Achieved Densities

| Zoned Density (FAR) | | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|---|
| **Very Low** | 0 - 0.35 FAR | 0 | 0 | |
| **Low** | 0.35 - 0.5 FAR | 0 | 0 | |
| **Medium Low** | 0.5 - 1.0 FAR | 0 | 0 | |
| **Medium High** | 1.0 - 3.0 FAR | 22,128 | 756 | **0.0** |
| **High** | 3.0 & up FAR | 0 | 0 | |
| | **Total** | **22,128** | **756** | **0.0** |

| Achieved Density Level | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|
| **Very Low** | 22,128 | 756 | **0.0** |
| **Low** | 0 | 0 | **0.0** |
| **Medium Low** | 0 | 0 | **0.0** |
| **Medium High** | 0 | 0 | **0.0** |
| **High** | 0 | 0 | **0.0** |
| **Total** | **22,128** | **756** | **0.0** |



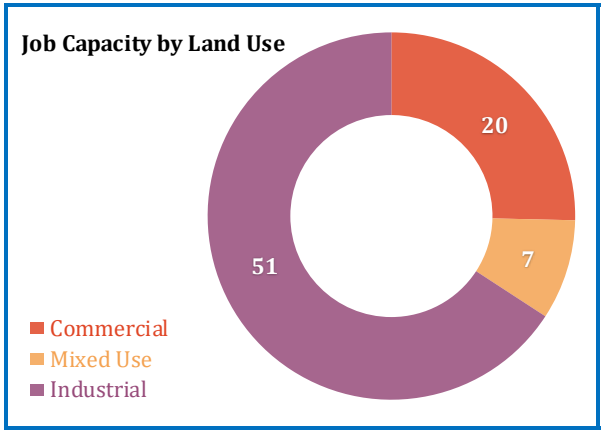



## Pacific - Commercial/Industrial Land Supply and Job Capacity

| Land Supply | Gross Area (acres) | Critical Areas (acres) | ROWs (acres) | Public Purpose (acres) | Initial Land Supply | Market Factor | Buildable Area (acres) |
|---|---|---|---|---|---|---|---|
| **Vacant / Redev.** | | | | | | | |
| Commercial | 14.1 | 11.4 | 0.3 | 0.3 | 2.2 | 50% | 0.8 |
| Mixed Use | 3.8 | 3.0 | 0.1 | 0.1 | 0.6 | 50% | 0.2 |
| Industrial | 27.7 | 8.8 | 1.9 | 1.9 | 15.1 | 50% | 5.7 |
| **Non-Res Land Total** | **45.6** | **23.2** | **2.2** | **2.2** | **17.9** | | **6.7** |

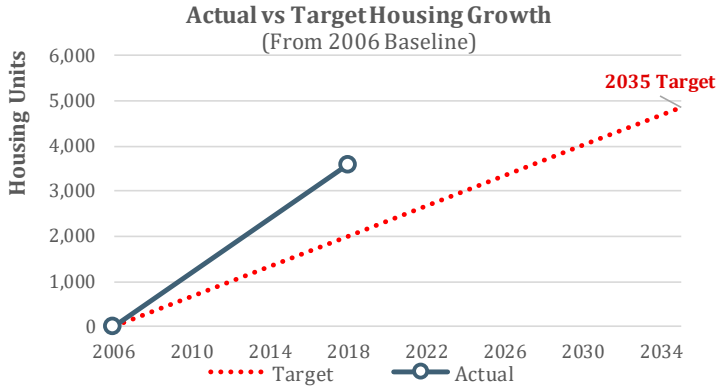
| Job Capacity by Land Use | Net Buildable Area (mil.sq.ft.) | Assumed Density Range (FAR) | Existing Floor Area (million sq.ft.) | Floor Area Capac. (million sq.ft.) | Sq. ft. per Job | Job Capacity |
|---|---|---|---|---|---|---|
| **Commercial** | | | | | | |
| Vacant | 0.03 | 0.25 | 0.00 | 0.01 | 450 | 16 |
| Redevelopable | 0.01 | 0.25 | 0.00 | 0.00 | 450 | 3 |
| **Commercial Total** | **0.04** | **0.25** | **0.00** | **0.01** | **450** | **20** |
| **Mixed-Use** | | | | | | |
| Vacant | 0.01 | 0.30 | 0.00 | 0.00 | 450 | 4 |
| Redevelopable | 0.00 | 0.30 | 0.00 | 0.00 | 450 | 2 |
| **Mixed Use Total** | **0.01** | **0.30** | **0.00** | **0.00** | **450** | **7** |
| **Industrial** | | | | | | |
| Vacant | 0.08 | 0.26 | 0.00 | 0.02 | 1,200 | 18 |
| Redevelopable | 0.17 | 0.26 | 0.00 | 0.04 | 1,200 | 33 |
| **Industrial Total** | **0.25** | **0.26** | **0.00** | **0.06** | **1,200** | **51** |
| **City Total** | | | | | | |
| Commercial | 0.04 | 0.25 | 0.69 | 0.01 | 450 | 20 |
| Mixed Use | 0.01 | 0.30 | 0.91 | 0.00 | 450 | 7 |
| Industrial | 0.25 | 0.26 | 0.26 | 0.06 | 1,200 | 51 |
| *Job Capacity in Pipeline* | | | | | | *0* |
| **City Total** | **0.29** | **0.25 / 0.30** | **1.86** | **0.07** | **450 / 1200** | **77** |

| Job Capacity by Assumed Density Level | # | % |
|---|---|---|
| Very Low Density | 77 | 100% |
| Low Density | 0 | 0% |
| Medium Low Density | 0 | 0% |
| Medium High Density | 0 | 0% |
| High Density | 0 | 0% |
| | | |
| *Capacity in Pipeline* | | *0* |
| **Total Capacity (jobs)** | | **77** |
| Remaining Target (2018-2035) | | 1,038 |
| **Surplus/Deficit Capacity (jobs)** | | **-961** |



# City of Sammamish

## Housing Growth and Residential Development Trends




| Sammamish Housing Growth Target: 2006-2035 | 4,849 |
|---|---|
| 2006 Estimated Housing Units | 18,196 |
| 2018 Estimated Housing Units | 21,780 |
| **Estimated Housing Growth** | **3,585** |
| Remaining 2035 Target | 1,264 |

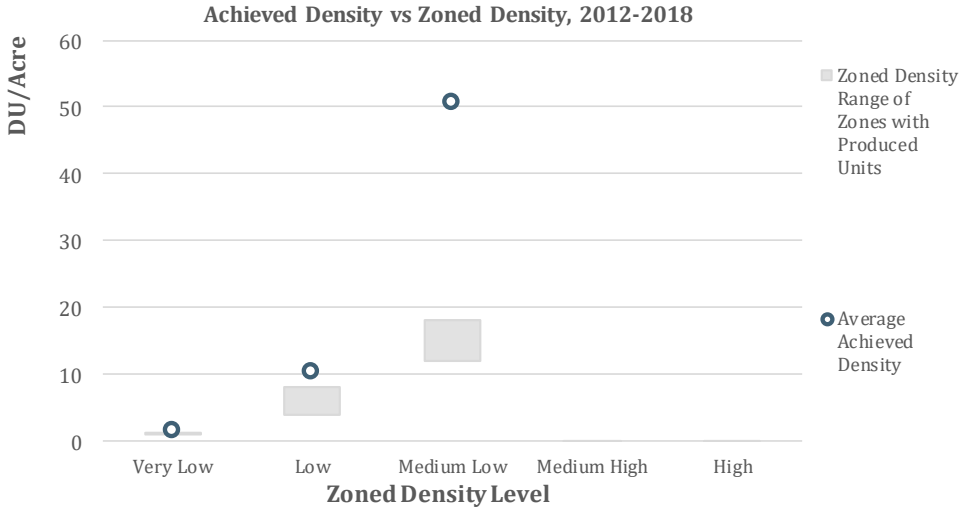
| % of Pace Needed to Achieve 2035 Housing Growth Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| 178.7% | 1.64% | 0.34% |

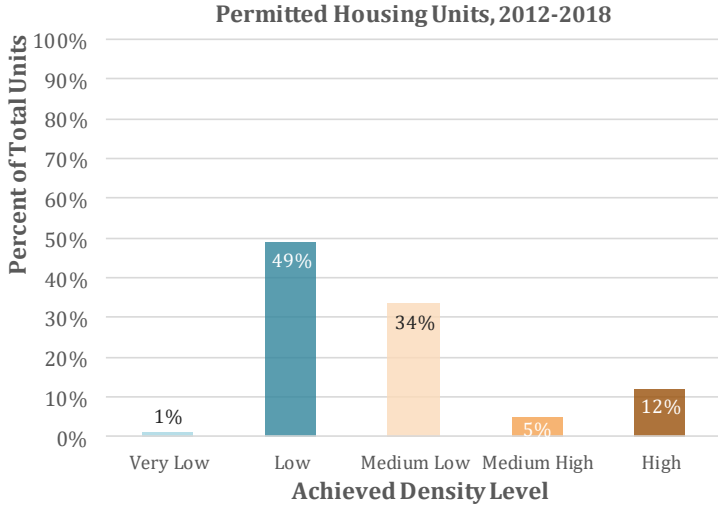
Since 2006, Sammamish has grown at 179% of the pace needed to achieve its 2035 housing growth target of 4,849 units. During this period, the total number of housing units in Sammamish grew by roughly 20%. At this current rate, Sammamish is over the production pace needed to meet its 2035 growth target, and needs to grow at an annual rate of 0.3% to reach its remaining target by 2035.

### Residential Achieved Densities

| Zoned Density (du/acre) | | Gross Area (acres) | Critical Areas (acres) | Public Purpose (acres) | ROWs (acres) | Net Area (acres) | Total Units | Achieved Density (DU/acre) |
|---|---|---|---|---|---|---|---|---|
| Very Low | 0 - 4 du/acre | 25.1 | 6.5 | 3.4 | 0.0 | 15.1 | 21 | **1.4** |
| Low | 4 - 10 du/acre | 338.5 | 14.1 | 162.3 | 16.9 | 145.2 | 1,498 | **10.3** |
| Medium Low | 10 - 24 du/acre | 10.2 | 0.6 | 2.3 | 0.2 | 7.2 | 364 | **50.7** |
| Medium High | 24 - 48 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| High | 48 & up du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| | **Total** | **373.8** | **21.2** | **167.9** | **17.1** | **167.5** | **1,883** | **11.2** |

| Achieved Density Level | Net Area (acres) | Total Units |
|---|---|---|
| Very Low | 15.1 | 21 |
| Low | 108.0 | 917 |
| Medium Low | 40.1 | 631 |
| Medium High | 2.2 | 92 |
| High | 2.1 | 222 |
| **Total** | **167.5** | **1,883** |



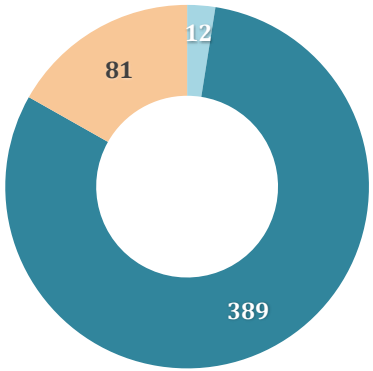



## Sammamish - Residential Land Supply and Capacity

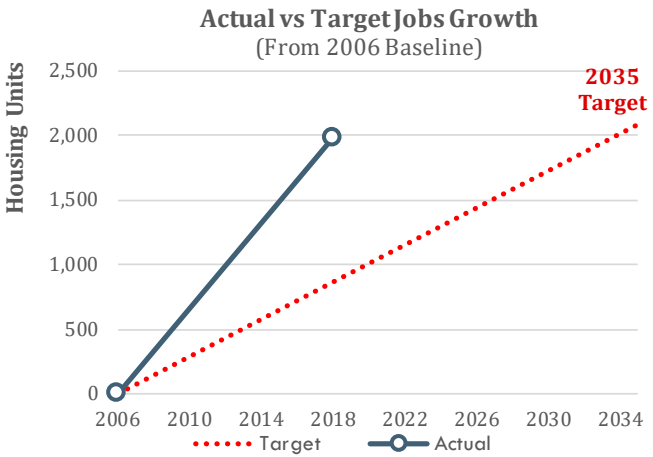
| Assumed Density Level | Vacant/ Redevelopable | Gross Acres | Critical Areas | Infrastructure Constrained Area | ROW & Public Purpose Discount | Market Factor (low/high) | Net Available Acres | Assumed Densities (low/high - units/acre) | Net Capacity (units) |
|---|---|---|---|---|---|---|---|---|---|
| **Very Low Density** | Vacant Subtotal | | | | 4.26 | 10.0% - 10.0% | 7.01 | 1.0 | 7 |
| | Redev Subtotal | | | | 4.88 | 10.0% - 10.0% | 8.04 | 1.0 | 5 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 9.14 | | 15.05 | | **12** |
| **Low Density** | Vacant Subtotal | | | | 16.27 | 10.0% - 50.0% | 26.79 | 4.0 / 8.0 | 122 |
| | Redev Subtotal | | | | 60.53 | 10.0% - 50.0% | 99.70 | 4.0 / 8.0 | 268 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 76.80 | | 126.49 | | **389** |
| **Medium Low Density** | Vacant Subtotal | | | | 0.00 | 50.0% - 50.0% | 0.00 | 12.0 / 16.0 | 0 |
| | Redev Subtotal | | | | 38.38 | 50.0% - 50.0% | 18.06 | 12.0 / 18.0 | 81 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 38.38 | | 18.06 | | **81** |
| **Medium High Density** | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | | **0** |
| **High Density** | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | | **0** |
| **All Zones** | Vacant Total | | | | 20.52 | | 33.80 | | 129 |
| | Redev Total | | | | 103.79 | | 125.80 | | 354 |
| | **Total** | **0.00** | **0.00** | **0.00** | **124.32** | | **159.60** | | **483** |

| Capacity (units) | |
|---|---|
| Very Low Density Zones | 12 |
| Low Density Zones | 389 |
| Medium Low Density Zones | 81 |
| Medium High Density Zones | 0 |
| High Density Zones | 0 |
| *Capacity in Pipeline* | *661* |
| **Total Capacity (Units)** | **1,144** |
| Remaining Target (2018-2035) | 1,264 |
| **Surplus/Deficit Capacity (Units)** | **-120** |

**Housing Capacity by Density Level** (units)



# Sammamish - Employment Growth and Commercial/Industrial Development Trends




| Sammamish Jobs Growth Target: 2006-2035 | 2,088 |
|---|---|
| 2006 Jobs (PSRC) | 6,199 |
| 2018 Jobs (PSRC) | 8,186 |
| **Total Jobs Growth** | **1,987** |
| Remaining 2035 Target | 101 |

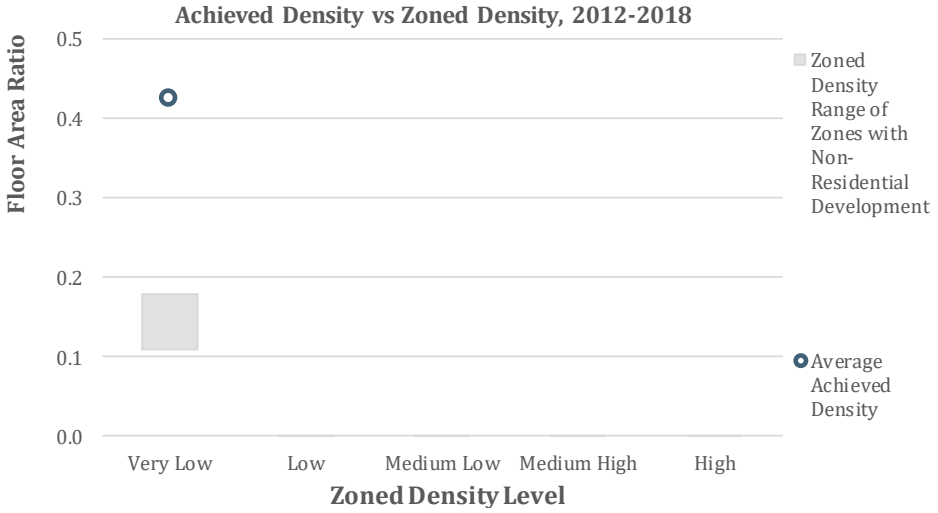
| % of Pace Needed to Achieve 2035 Jobs Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| 230.0% | 2.67% | 0.07% |

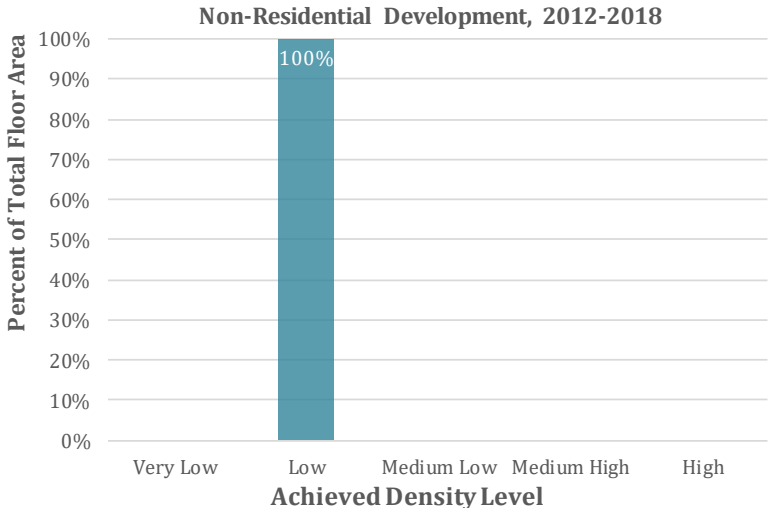
Since 2006, Sammamish has grown at 230% of the pace needed to achieve its 2035 jobs growth target of 2,088 units. During this period, the total number of jobs in Sammamish grew by roughly 32%. At this current rate, Sammamish is over the pace needed to meet its 2035 jobs growth target, and needs to grow at an annual rate of 0.1% to reach its remaining target by 2035.

## Non-Residential Achieved Densities

| Zoned Density (FAR) | | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|---|
| Very Low | 0 - 0.35 FAR | 377,774 | 160,700 | 0.4 |
| Low | 0.35 - 0.5 FAR | 0 | 0 | |
| Medium Low | 0.5 - 1.0 FAR | 0 | 0 | |
| Medium High | 1.0 - 3.0 FAR | 0 | 0 | |
| High | 3.0 & up FAR | 0 | 0 | |
| | **Total** | **377,774** | **160,700** | **0.4** |

| Achieved Density Level | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|
| Very Low | 0 | 0 | 0.0 |
| Low | 377,774 | 160,700 | 0.4 |
| Medium Low | 0 | 0 | 0.0 |
| Medium High | 0 | 0 | 0.0 |
| High | 0 | 0 | 0.0 |
| **Total** | **377,774** | **160,700** | **0.4** |



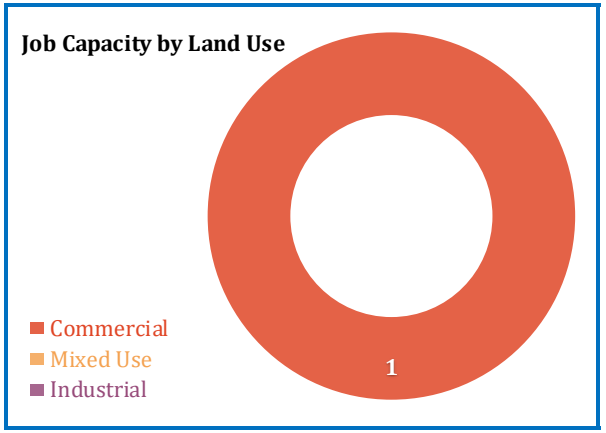



## Sammamish - Commercial/Industrial Land Supply and Job Capacity

| Land Supply | Gross Area (acres) | Critical Areas (acres) | ROWs (acres) | Public Purpose (acres) | Initial Land Supply | Market Factor | Buildable Area (acres) |
|---|---|---|---|---|---|---|---|
| **Vacant / Redev.** | | | | | | | |
| Commercial | 4.8 | 0.0 | 0.9 | 0.8 | 3.2 | 50% | 0.8 |
| Mixed Use | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 50% | 0.0 |
| Industrial | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0% | 0.0 |
| **Non-Res Land Total** | **4.8** | **0.0** | **0.9** | **0.8** | **3.2** | | **0.8** |

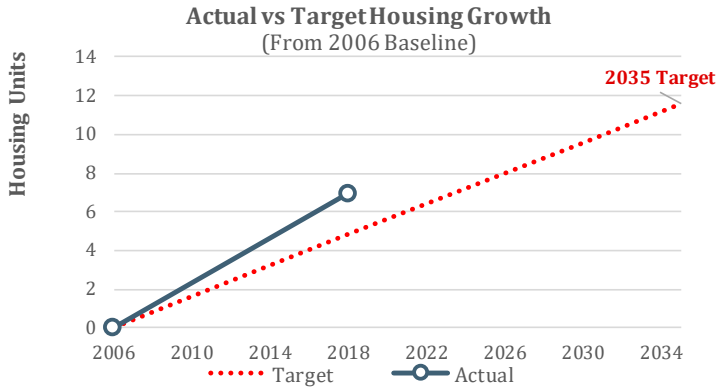
| Job Capacity by Assumed Density Level | # | % |
|---|---|---|
| Very Low Density | 0 | 0% |
| Low Density | 0 | 0% |
| Medium Low Density | 1 | 100% |
| Medium High Density | 0 | 0% |
| High Density | 0 | 0% |
| | | |
| *Capacity in Pipeline* | | *304* |
| **Total Capacity (jobs)** | | **305** |
| Remaining Target (2018-2035) | | 101 |
| **Surplus/Deficit Capacity (jobs)** | | **204** |

| Job Capacity by Land Use | Net Buildable Area (mil.sq.ft.) | Assumed Density Range (FAR) | Existing Floor Area (million sq.ft.) | Floor Area Capac. (million sq.ft.) | Sq. ft. per Job | Job Capacity |
|---|---|---|---|---|---|---|
| **Commercial** | | | | | | |
| Vacant | 0.00 | 0.00 | 0.00 | 0.00 | 0 | 0 |
| Redevelopable | 0.03 | 0.50 | 0.03 | 0.00 | 370 | 1 |
| **Commercial Total** | **0.03** | **0.50** | **0.03** | **0.00** | **370** | **1** |
| **Mixed-Use** | | | | | | |
| Vacant | 0.00 | 0.11 / 0.23 | 0.00 | 0.00 | 0 / 370 | 0 |
| Redevelopable | 0.00 | 0.18 / 0.23 | 0.00 | 0.00 | 0 / 370 | 0 |
| **Mixed Use Total** | **0.00** | **0.11 / 8.00** | **0.00** | **0.00** | **0 / 370** | **0** |
| **Industrial** | | | | | | |
| Vacant | 0.00 | 0.00 | 0.00 | 0.00 | 0 | 0 |
| Redevelopable | 0.00 | 0.00 | 0.00 | 0.00 | 0 | 0 |
| **Industrial Total** | **0.00** | **0.00** | **0.00** | **0.00** | **0** | **0** |
| **City Total** | | | | | | |
| Commercial | 0.03 | 0.50 | 0.69 | 0.00 | 370 | 1 |
| Mixed Use | 0.00 | 0.11 / 8.00 | 0.91 | 0.00 | 0 / 370 | 0 |
| Industrial | 0.00 | 0.00 | 0.26 | 0.00 | 0 | 0 |
| *Job Capacity in Pipeline* | | | | | | *304* |
| **City Total** | **0.03** | **8.00** | **1.86** | **0.00** | **0 / 370** | **305** |



# Town of Skykomish

## Housing Growth and Residential Development Trends




| Skykomish Housing Growth Target: 2006-2035 | 12 |
|---|---|
| 2006 Estimated Housing Units | 166 |
| 2018 Estimated Housing Units | 173 |
| **Estimated Housing Growth** | **7** |
| Remaining 2035 Target | 5 |

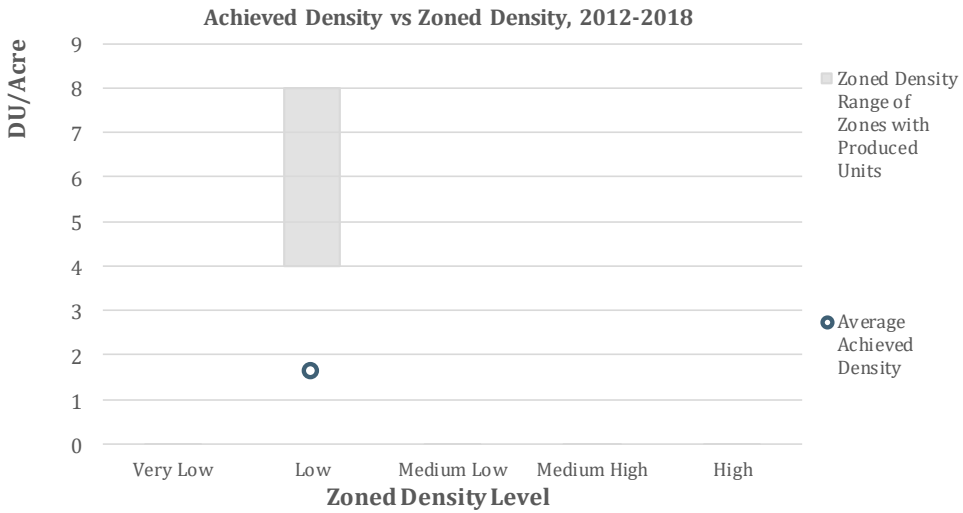
| % of Pace Needed to Achieve 2035 Housing Growth Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| 144.1% | 0.35% | 0.16% |

Since 2006, Skykomish has grown at 144% of the pace needed to achieve its 2035 housing growth target of 12 units. During this period, the total number of housing units in Skykomish grew by roughly 4%. At this current rate, Skykomish is over the production pace needed to meet its 2035 growth target, and needs to grow at an annual rate of 0.2% to reach its remaining target by 2035.

### Residential Achieved Densities

| Zoned Density (du/acre) | | Gross Area (acres) | Critical Areas (acres) | Public Purpose (acres) | ROWs (acres) | Net Area (acres) | Total Units | Achieved Density (DU/acre) |
|---|---|---|---|---|---|---|---|---|
| Very Low | 0 - 4 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| Low | 4 - 10 du/acre | 1.2 | 0.0 | 0.0 | 0.0 | 1.2 | 2 | 1.6 |
| Medium Low | 10 - 24 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| Medium High | 24 - 48 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| High | 48 & up du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| | Total | 1.2 | 0.0 | 0.0 | 0.0 | 1.2 | 2 | 1.6 |

| Achieved Density Level | Net Area (acres) | Total Units |
|---|---|---|
| Very Low | 1.2 | 2 |
| Low | 0.0 | 0 |
| Medium Low | 0.0 | 0 |
| Medium High | 0.0 | 0 |
| High | 0.0 | 0 |
| Total | 1.2 | 2 |

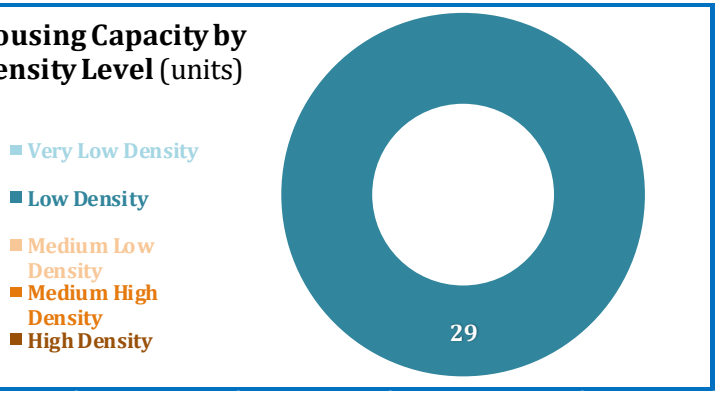


## Skykomish - Residential Land Supply and Capacity

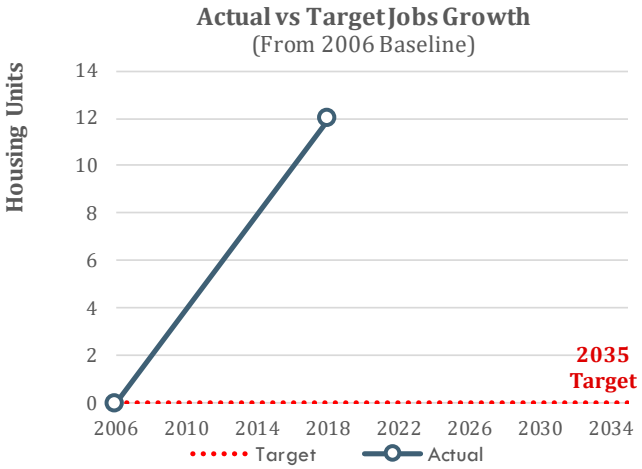
| Assumed Density Level | Vacant/ Redevelopable | Gross Acres | Critical Areas | Infrastructure Constrained Area | ROW & Public Purpose Discount | Market Factor (low/high) | Net Available Acres | Assumed Densities (low/high - units/acre) | Net Capacity (units) |
|---|---|---|---|---|---|---|---|---|---|
| Very Low Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | | **0** |
| Low Density | Vacant Subtotal | | | | 1.25 | 41.0% - 41.0% | 6.14 | 4.0 / 8.0 | 29 |
| | Redev Subtotal | | | | 0.00 | 41.0% - 41.0% | 0.00 | 4.0 / 8.0 | 0 |
| | **Subtotal** | 118.13 | 105.41 | 0.19 | 1.25 | | 6.14 | | **29** |
| Medium Low Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | | **0** |
| Medium High Density | Vacant Subtotal | | | | 0.00 | 36.0% - 40.0% | 0.00 | 24.0 | 0 |
| | Redev Subtotal | | | | 0.00 | 36.0% - 40.0% | 0.00 | 24.0 | 0 |
| | **Subtotal** | 5.90 | 5.90 | 0.00 | 0.00 | | 0.00 | | **0** |
| High Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | | **0** |
| All Zones | Vacant Total | | | | 1.25 | | 6.14 | | 29 |
| | Redev Total | | | | 0.00 | | 0.00 | | 0 |
| | **Total** | **124.03** | **111.31** | **0.19** | **1.25** | | **6.14** | | **29** |

| Capacity (units) | |
|---|---|
| Very Low Density Zones | 0 |
| Low Density Zones | 29 |
| Medium Low Density Zones | 0 |
| Medium High Density Zones | 0 |
| High Density Zones | 0 |
| *Capacity in Pipeline* | *0* |
| **Total Capacity (Units)** | **29** |
| Remaining Target (2018-2035) | 5 |
| **Surplus/Deficit Capacity (Units)** | **25** |

**Housing Capacity by Density Level** (units)



# Skykomish - Employment Growth and Commercial/Industrial Development Trends




| Skykomish Jobs Growth Target: 2006-2035 | 0 |
|---|---|
| 2006 Jobs (PSRC) | 64 |
| 2018 Jobs (PSRC) | 76 |
| **Total Jobs Growth** | **12** |
| **Remaining 2035 Target** | **Not Applicable** |

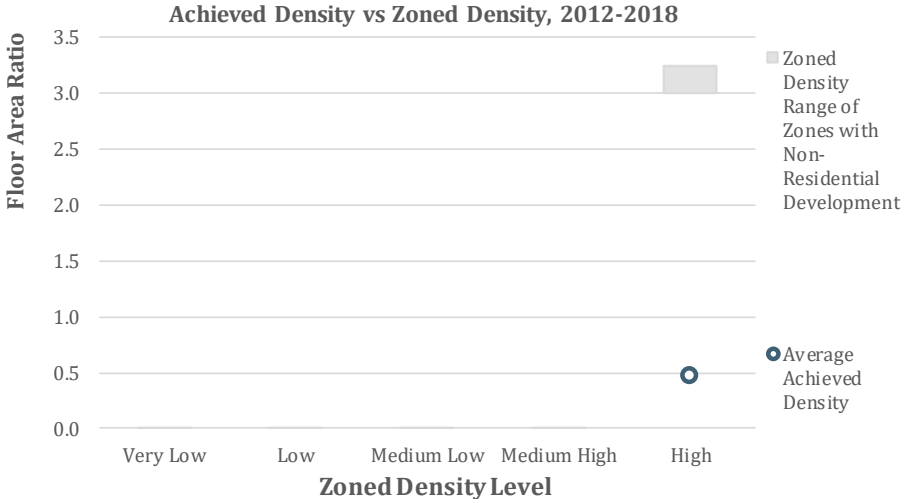
| % of Pace Needed to Achieve 2035 Jobs Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| **Not Applicable** | **1.56%** | **Not Applicable** |

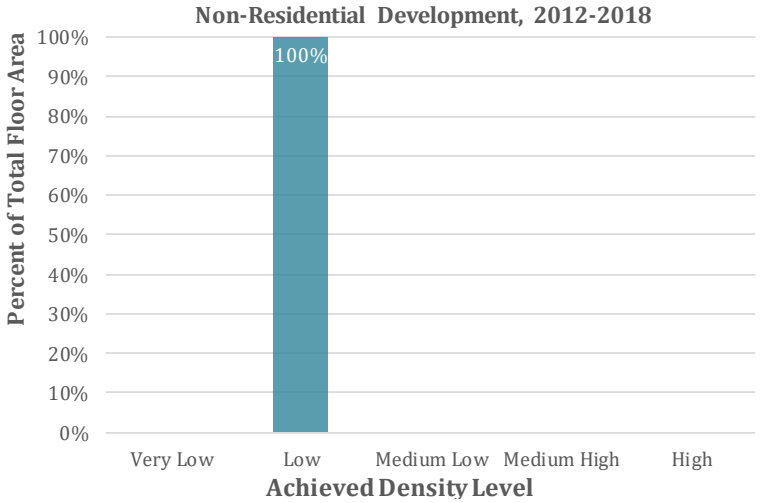
Since 2006, the total number of jobs in Skykomish grew by roughly 1.5%. There is no 2035 jobs growth target.

## Non-Residential Achieved Densities

| Zoned Density (FAR) | | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|---|
| **Very Low** | 0 - 0.35 FAR | 0 | 0 | |
| **Low** | 0.35 - 0.5 FAR | 0 | 0 | |
| **Medium Low** | 0.5 - 1.0 FAR | 0 | 0 | |
| **Medium High** | 1.0 - 3.0 FAR | 0 | 0 | |
| **High** | 3.0 & up FAR | 5,227 | 2,450 | **0.5** |
| | **Total** | **5,227** | **2,450** | **0.5** |

| Achieved Density Level | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|
| **Very Low** | 0 | 0 | **0.0** |
| **Low** | 5,227 | 2,450 | **0.5** |
| **Medium Low** | 0 | 0 | **0.0** |
| **Medium High** | 0 | 0 | **0.0** |
| **High** | 0 | 0 | **0.0** |
| **Total** | **5,227** | **2,450** | **0.5** |



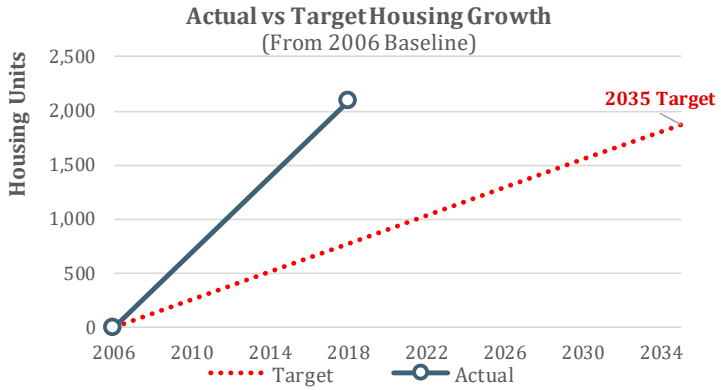



## Skykomish - Commercial/Industrial Land Supply and Job Capacity

(no job capacity in Skykomish)

# City of Snoqualmie

## Housing Growth and Residential Development Trends




| Snoqualmie Housing Growth Target: 2006-2035 | 1,873 |
|---|---|
| 2006 Estimated Housing Units | 2,864 |
| 2018 Estimated Housing Units | 4,951 |
| **Estimated Housing Growth** | **2,087** |
| Remaining 2035 Target | 0 |

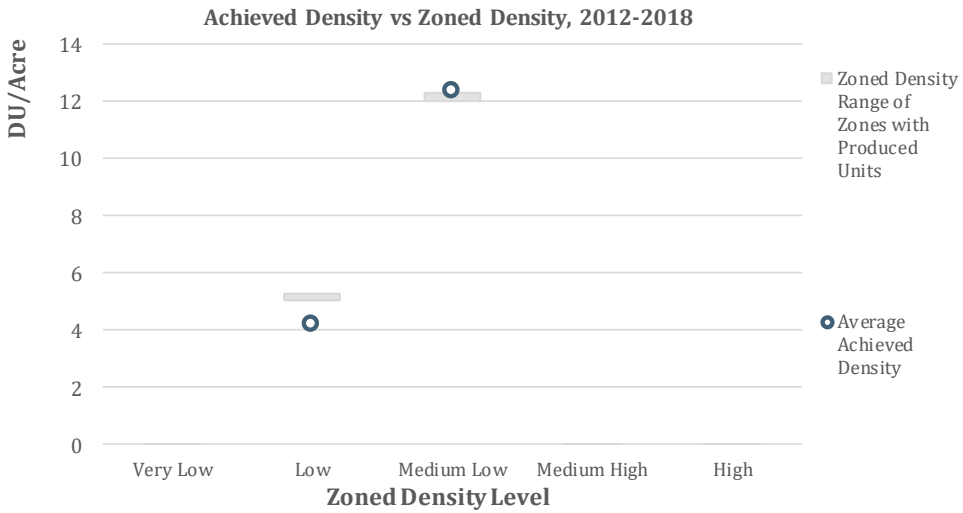
| % of Pace Needed to Achieve 2035 Housing Growth Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| 269.2% | 6.07% | Met Target |

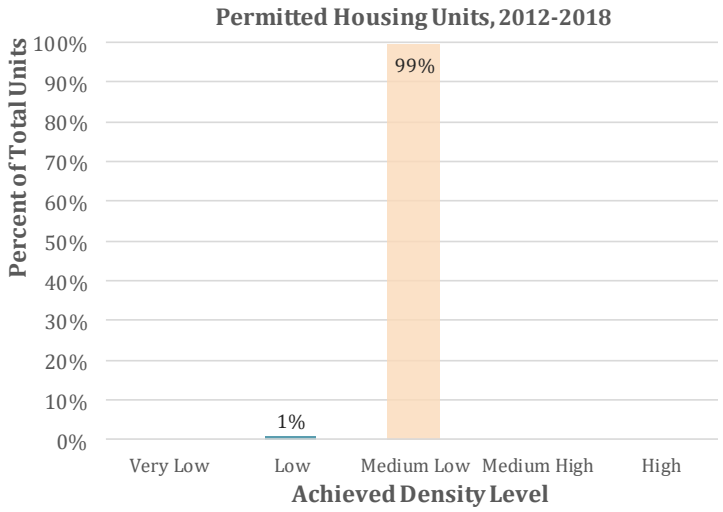
Since 2006, Snoqualmie has grown at 269% of the pace needed to achieve its 2035 housing growth target of 1,873 units. During this period, the total number of housing units in Snoqualmie grew by roughly 73%. Snoqualmie has achieved its 2035 housing growth target.

### Residential Achieved Densities

| Zoned Density (du/acre) | | Gross Area (acres) | Critical Areas (acres) | Public Purpose (acres) | ROWs (acres) | Net Area (acres) | Total Units | Achieved Density (DU/acre) |
|---|---|---|---|---|---|---|---|---|
| Very Low | 0 - 4 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| Low | 4 - 10 du/acre | 1.0 | 0.0 | 0.0 | 0.0 | 1.0 | 4 | **4.1** |
| Medium Low | 10 - 24 du/acre | 52.0 | 0.0 | 0.0 | 0.0 | 52.0 | 640 | **12.3** |
| Medium High | 24 - 48 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| High | 48 & up du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| | **Total** | **52.9** | **0.0** | **0.0** | **0.0** | **52.9** | **644** | **12.2** |

| Achieved Density Level | Net Area (acres) | Total Units |
|---|---|---|
| Very Low | 0.0 | 0 |
| Low | 1.0 | 4 |
| Medium Low | 52.0 | 640 |
| Medium High | 0.0 | 0 |
| High | 0.0 | 0 |
| **Total** | **52.9** | **644** |



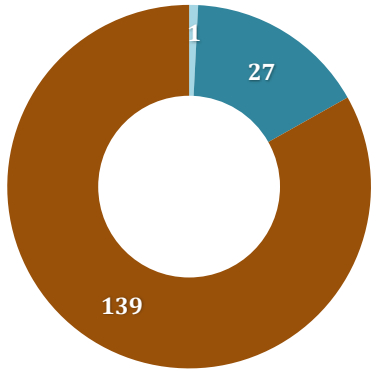



## Snoqualmie - Residential Land Supply and Capacity

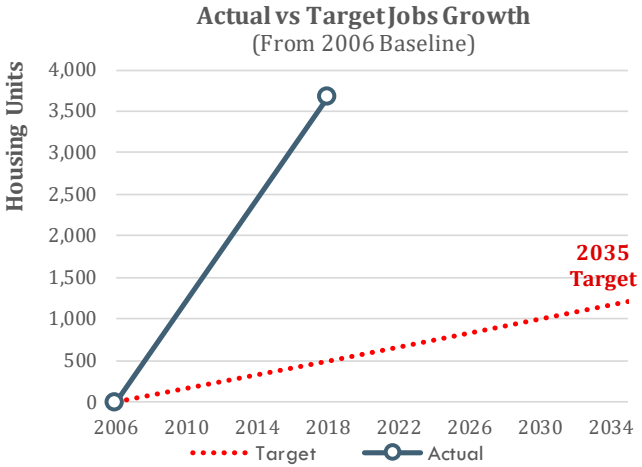
| Assumed Density Level | Vacant/ Redevelopable | Gross Acres | Critical Areas | Infrastructure Constrained Area | ROW & Public Purpose Discount | Market Factor (low/high) | Net Available Acres | Assumed Densities (low/high - units/acre) | Net Capacity (units) |
|---|---|---|---|---|---|---|---|---|---|
| Very Low Density | Vacant Subtotal | | | | 4.45 | 75.0% - 75.0% | 6.67 | 0.2 | 1 |
| | Redev Subtotal | | | | 0.03 | 75.0% - 75.0% | 0.04 | 0.2 | 0 |
| | **Subtotal** | 79.30 | 34.58 | 0.00 | 4.47 | | 6.71 | | **1** |
| Low Density | Vacant Subtotal | | | | 0.06 | 35.0% - 35.0% | 0.31 | 4.2 | 1 |
| | Redev Subtotal | | | | 1.17 | 35.0% - 35.0% | 6.41 | 4.2 | 26 |
| | **Subtotal** | 12.63 | 11.01 | 0.00 | 1.22 | | 6.72 | | **27** |
| Medium Low Density | Vacant Subtotal | | | | 0.00 | 1.0% - 1.0% | 0.00 | 12.0 / 12.3 | 0 |
| | Redev Subtotal | | | | 0.00 | 1.0% - 1.0% | 0.00 | 12.0 / 12.3 | 0 |
| | **Subtotal** | 33.00 | 23.00 | 0.00 | 0.00 | | 0.00 | | **0** |
| Medium High Density | Vacant Subtotal | | | | 0.00 | 1.0% - 1.0% | 0.00 | 25.0 | 0 |
| | Redev Subtotal | | | | 0.00 | 1.0% - 1.0% | 0.00 | 25.0 | 0 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | | **0** |
| High Density | Vacant Subtotal | | | | 0.20 | 5.0% - 5.0% | 1.07 | 130.0 | 139 |
| | Redev Subtotal | | | | 0.00 | 5.0% - 5.0% | 0.00 | 130.0 | 0 |
| | **Subtotal** | 1.34 | 0.00 | 0.00 | 0.20 | | 1.07 | | **139** |
| All Zones | Vacant Total | | | | 4.70 | | 8.05 | | 142 |
| | Redev Total | | | | 1.19 | | 6.45 | | 26 |
| | **Total** | **126.27** | **68.59** | **0.00** | **5.90** | | **14.50** | | **168** |

| Capacity (units) | |
|---|---|
| Very Low Density Zones | 1 |
| Low Density Zones | 27 |
| Medium Low Density Zones | 0 |
| Medium High Density Zones | 0 |
| High Density Zones | 139 |
| *Capacity in Pipeline* | *204* |
| **Total Capacity (Units)** | **372** |
| Remaining Target (2018-2035) | 0 |
| **Surplus/Deficit Capacity (Units)** | **372** |

**Housing Capacity by Density Level** (units)



# Snoqualmie - Employment Growth and Commercial/Industrial Development Trends




| Snoqualmie Jobs Growth Target: 2006-2035 | 1,218 |
|---|---|
| 2006 Jobs (PSRC) | 2,004 |
| 2018 Jobs (PSRC) | 5,688 |
| **Total Jobs Growth** | **3,684** |
| **Remaining 2035 Target** | **0** |

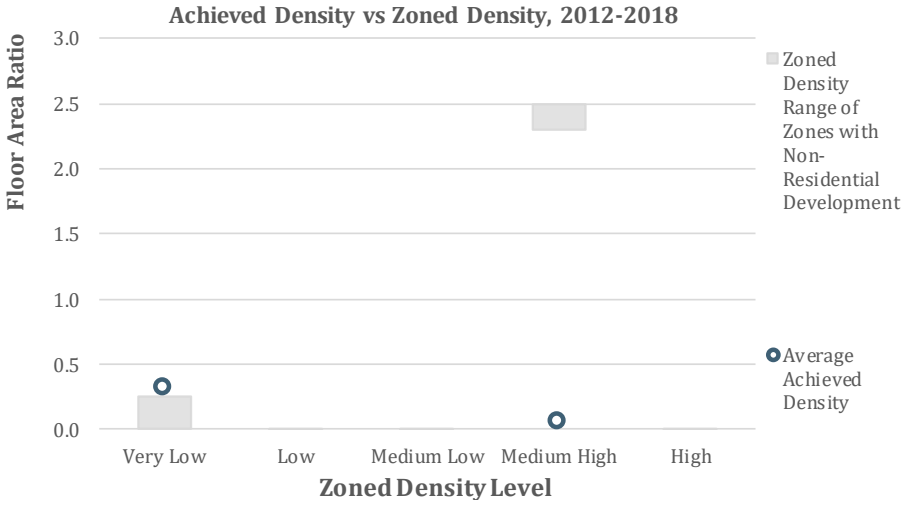
| % of Pace Needed to Achieve 2035 Jobs Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| **731.0%** | **15.32%** | **Met Target** |

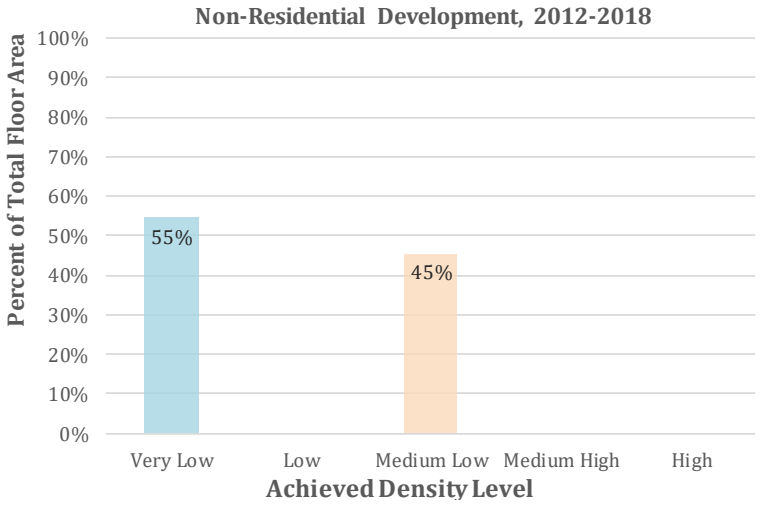
Since 2006, Snoqualmie has grown at 731% of the pace needed to achieve its 2035 jobs growth target of 1,218 units. During this period, the total number of jobs in Snoqualmie grew by roughly 184%. Snoqualmie has achieved its 2035 jobs growth target.

## Non-Residential Achieved Densities

| Zoned Density (FAR) | | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|---|
| **Very Low** | 0 - 0.35 FAR | 3,819,208 | 1,239,861 | **0.3** |
| **Low** | 0.35 - 0.5 FAR | 0 | 0 | |
| **Medium Low** | 0.5 - 1.0 FAR | 0 | 0 | |
| **Medium High** | 1.0 - 3.0 FAR | 736,164 | 39,699 | **0.1** |
| **High** | 3.0 & up FAR | 0 | 0 | |
| | **Total** | **4,555,372** | **1,279,560** | **0.3** |

| Achieved Density Level | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|
| **Very Low** | 3,396,241 | 698,916 | **0.2** |
| **Low** | 0 | 0 | **0.0** |
| **Medium Low** | 1,159,131 | 580,644 | **0.5** |
| **Medium High** | 0 | 0 | **0.0** |
| **High** | 0 | 0 | **0.0** |
| **Total** | **4,555,372** | **1,279,560** | **0.3** |



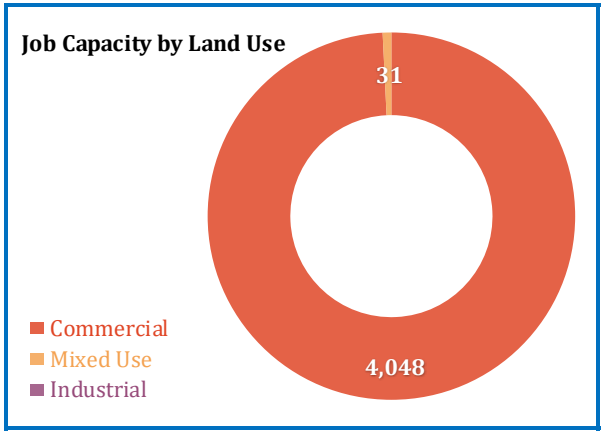
## Snoqualmie - Commercial/Industrial Land Supply and Job Capacity

| Land Supply | Gross Area (acres) | Critical Areas (acres) | ROWs (acres) | Public Purpose (acres) | Initial Land Supply | Market Factor | Buildable Area (acres) |
|---|---|---|---|---|---|---|---|
| **Vacant / Redev.** | | | | | | | |
| Commercial | 42.9 | 18.7 | 1.2 | 2.4 | 20.6 | 15% - 45% | 11.1 |
| Mixed Use | 1.3 | 0.0 | 0.1 | 0.1 | 1.1 | 1% - 5% | 1.1 |
| Industrial | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0% | 0.0 |
| **Non-Res Land Total** | **44.2** | **18.7** | **1.3** | **3.2** | **26.9** | | **12.2** |

| Job Capacity by Land Use | Net Buildable Area (mil.sq.ft.) | Assumed Density Range (FAR) | Existing Floor Area (million sq.ft.) | Floor Area Capac. (million sq.ft.) | Sq. ft. per Job | Job Capacity |
|---|---|---|---|---|---|---|
| **Commercial*** | | | | | | |
| Vacant | 0.45 | 0.25 / 0.40 | 0.00 | 0.16 | 300 / 490 | 3,978 |
| Redevelopable | 0.16 | 0.25 / 0.40 | 0.01 | 0.03 | 300 / 490 | 70 |
| **Commercial Total** | **0.60** | **0.25 / 0.40** | **0.01** | **0.20** | **300 / 490** | **4,048** |
| **Mixed-Use** | | | | | | |
| Vacant | 0.05 | 0.25 | 0.00 | 0.01 | 300 / 400 | 31 |
| Redevelopable | 0.00 | 0.25 | 0.00 | 0.00 | 300 / 400 | 0 |
| **Mixed Use Total** | **0.05** | **0.25** | **0.00** | **0.01** | **300 / 400** | **31** |
| **Industrial** | | | | | | |
| Vacant | 0.00 | 0.00 | 0.00 | 0.00 | 800 | 0 |
| Redevelopable | 0.00 | 0.00 | 0.00 | 0.00 | 800 | 0 |
| **Industrial Total** | **0.00** | **0.00** | **0.00** | **0.00** | **800** | **0** |
| **City Total** | | | | | | |
| Commercial | 0.60 | 0.25 / 0.40 | 0.69 | 0.20 | 300 / 490 | 4,048 |
| Mixed Use | 0.05 | 0.25 | 0.91 | 0.01 | 300 / 400 | 31 |
| Industrial | 0.00 | 0.00 | 0.26 | 0.00 | 800 | 0 |
| *Job Capacity in Pipeline* | | | | | | *0* |
| **City Total** | **0.65** | **0.40** | **1.86** | **0.21** | **300 / 800** | **4,079** |

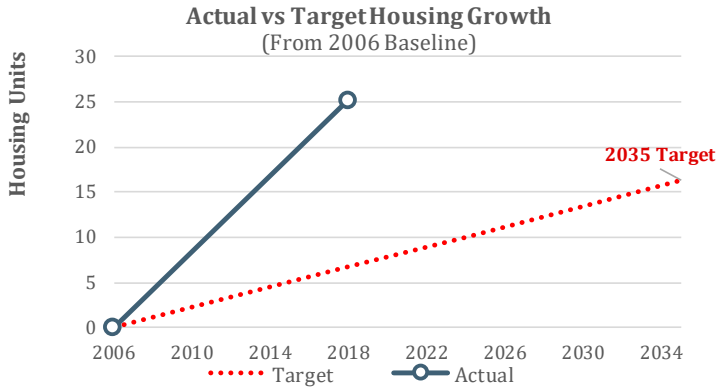
*Certain zones grouped as commercial allow for industrial use.

| Job Capacity by Assumed Density Level | # | % |
|---|---|---|
| Very Low Density | 3,633 | 89% |
| Low Density | 446 | 11% |
| Medium Low Density | 0 | 0% |
| Medium High Density | 0 | 0% |
| High Density | 0 | 0% |
| | | |
| *Capacity in Pipeline* | | *0* |
| **Total Capacity (jobs)** | | **4,079** |
| Remaining Target (2018-2035) | | 0 |
| **Surplus/Deficit Capacity (jobs)** | | **4,079** |



# Town of Yarrow Point

## Housing Growth and Residential Development Trends




| Yarrow Point Housing Growth Target: 2006-2035 | 16 |
|---|---|
| 2006 Estimated Housing Units | 401 |
| 2018 Estimated Housing Units | 426 |
| **Estimated Housing Growth** | **25** |
| Remaining 2035 Target | 0 |

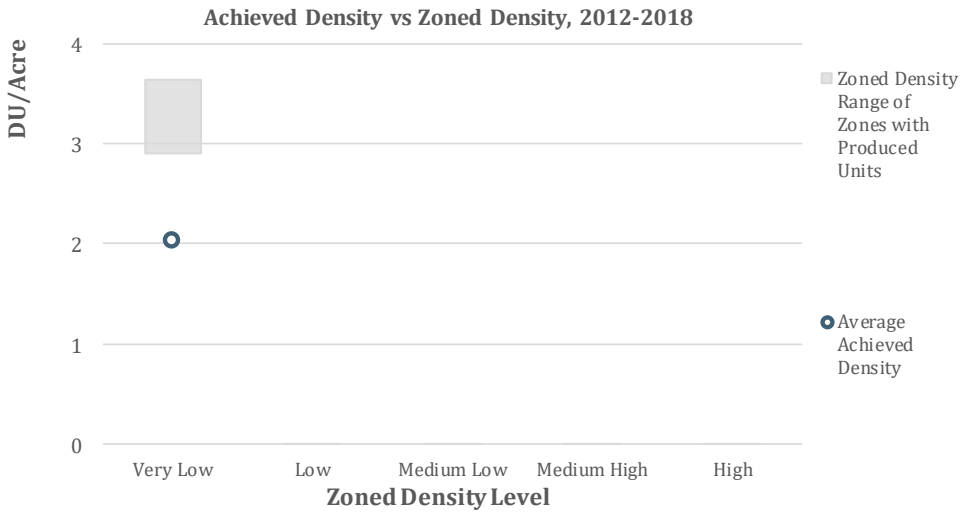
| % of Pace Needed to Achieve 2035 Housing Growth Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| 374.6% | 0.52% | Met Target |

Since 2006, Yarrow Point has grown at 375% of the pace needed to achieve its 2035 housing growth target of 16 units. During this period, the total number of housing units in Yarrow Point grew by roughly 6%. Yarrow Point has achieved its 2035 housing growth target.

### Residential Achieved Densities

| Zoned Density (du/acre) | | Gross Area (acres) | Critical Areas (acres) | Public Purpose (acres) | ROWs (acres) | Net Area (acres) | Total Units | Achieved Density (DU/acre) |
|---|---|---|---|---|---|---|---|---|
| Very Low | 0 - 4 du/acre | 1.0 | 0.0 | 0.0 | 0.0 | 1.0 | 2 | 2.0 |
| Low | 4 - 10 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| Medium Low | 10 - 24 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| Medium High | 24 - 48 du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| High | 48 & up du/acre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0 | |
| | Total | 1.0 | 0.0 | 0.0 | 0.0 | 1.0 | 2 | 2.0 |

| Achieved Density Level | Net Area (acres) | Total Units |
|---|---|---|
| Very Low | 1.0 | 2 |
| Low | 0.0 | 0 |
| Medium Low | 0.0 | 0 |
| Medium High | 0.0 | 0 |
| High | 0.0 | 0 |
| Total | 1.0 | 2 |

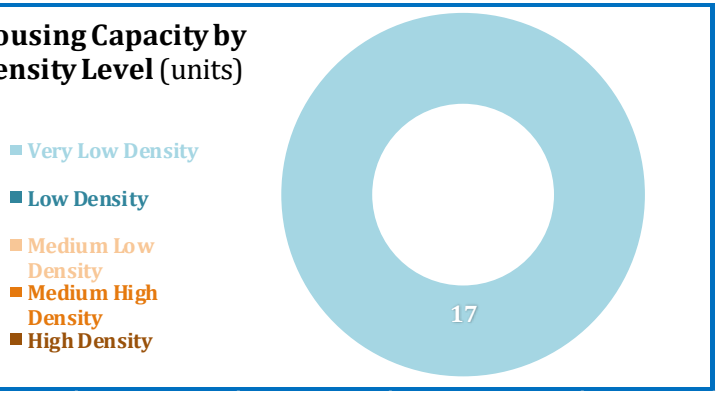


## Yarrow Point - Residential Land Supply and Capacity

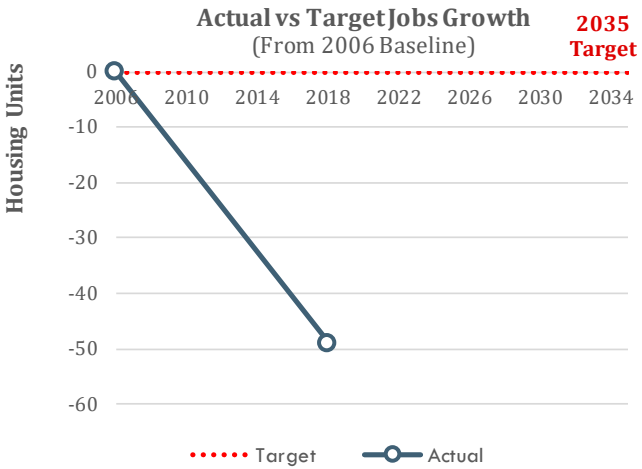
| Assumed Density Level | Vacant/ Redevelopable | Gross Acres | Critical Areas | Infrastructure Constrained Area | ROW & Public Purpose Discount | Market Factor (low/high) | Net Available Acres | Assumed Densities (low/high - units/acre) | Net Capacity (units) |
|---|---|---|---|---|---|---|---|---|---|
| Very Low Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 1.93 | 2.0 / 3.6 | 5 |
| | Redev Subtotal | | | | 0.00 | 0.0% - 0.0% | 8.67 | 2.0 / 3.6 | 12 |
| | **Subtotal** | 26.79 | 9.44 | 0.39 | 0.00 | | 10.60 | | **17** |
| Low Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | | **0** |
| Medium Low Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | | **0** |
| Medium High Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | | **0** |
| High Density | Vacant Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | Redev Subtotal | | | | 0.00 | 0.0% - 0.0% | 0.00 | 0.0 | 0 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 0.00 | | 0.00 | | **0** |
| All Zones | Vacant Total | | | | 0.00 | | 1.93 | | 5 |
| | Redev Total | | | | 0.00 | | 8.67 | | 12 |
| | **Total** | **26.79** | **9.44** | **0.39** | **0.00** | | **10.60** | | **17** |

| Capacity (units) | |
|---|---|
| Very Low Density Zones | 17 |
| Low Density Zones | 0 |
| Medium Low Density Zones | 0 |
| Medium High Density Zones | 0 |
| High Density Zones | 0 |
| *Capacity in Pipeline* | *0* |
| **Total Capacity (Units)** | **17** |
| Remaining Target (2018-2035) | 0 |
| **Surplus/Deficit Capacity (Units)** | **17** |

**Housing Capacity by Density Level** (units)



# Yarrow Point - Employment Growth and Commercial/Industrial Development Trends




| Yarrow Point Jobs Growth Target: 2006-2035 | 0 |
|---|---|
| 2006 Jobs (PSRC) | 109 |
| 2018 Jobs (PSRC) | 60 |
| **Total Jobs Growth** | **-49** |
| **Remaining 2035 Target** | **Not Applicable** |

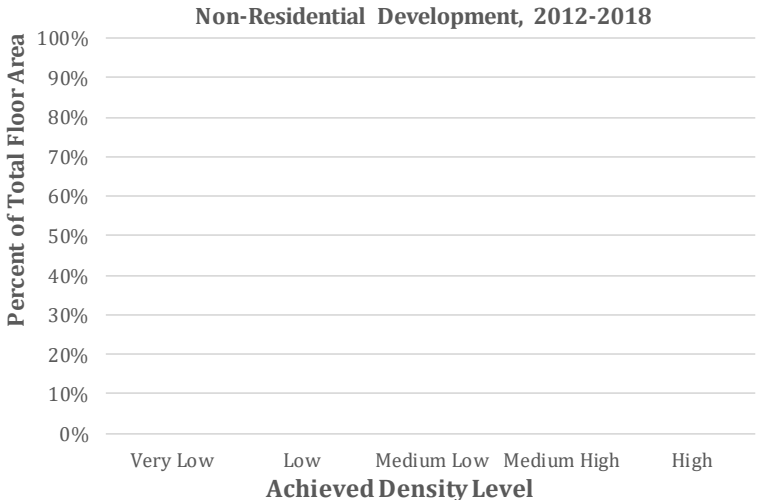
| % of Pace Needed to Achieve 2035 Jobs Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| **Not Applicable** | **-3.75%** | **Not Applicable** |

Since 2006, the total number of jobs in Yarrow Point grew by roughly -4%. There is no 2035 jobs growth target.

## Non-Residential Achieved Densities

| Zoned Density (FAR) | | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|---|
| **Very Low** | 0 - 0.35 FAR | 0 | 0 | |
| **Low** | 0.35 - 0.5 FAR | 0 | 0 | |
| **Medium Low** | 0.5 - 1.0 FAR | 0 | 0 | |
| **Medium High** | 1.0 - 3.0 FAR | 0 | 0 | |
| **High** | 3.0 & up FAR | 0 | 0 | |
| | **Total** | **0** | **0** | |

| Achieved Density Level | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|
| **Very Low** | 0 | 0 | **0.0** |
| **Low** | 0 | 0 | **0.0** |
| **Medium Low** | 0 | 0 | **0.0** |
| **Medium High** | 0 | 0 | **0.0** |
| **High** | 0 | 0 | **0.0** |
| **Total** | **0** | **0** | **0.0** |



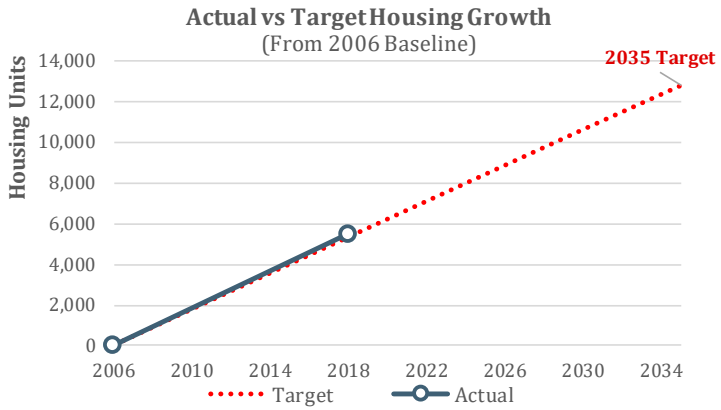
## Yarrow Point - Commercial/Industrial Land Supply and Job Capacity

(no job capacity in Yarrow Point)

# Urban Unincorporated Areas

# Urban Unincorporated King County

## Housing Growth and Residential Development Trends




| Unincorporated King County Housing Growth Target: 2006-2035 | 12,837 |
|---|---|
| 2006 Estimated Housing Units | 35,910 |
| 2018 Estimated Housing Units | 41,408 |
| **Estimated Housing Growth** | **5,498** |
| **Remaining 2035 Target** | **7,339** |

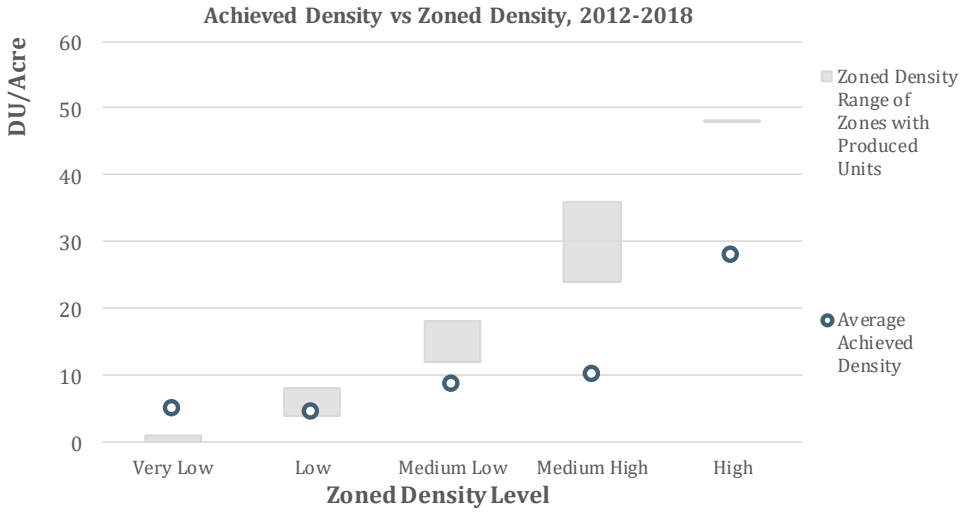
| % of Pace Needed to Achieve 2035 Housing Growth Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| 103.5% | 1.28% | 1.04% |

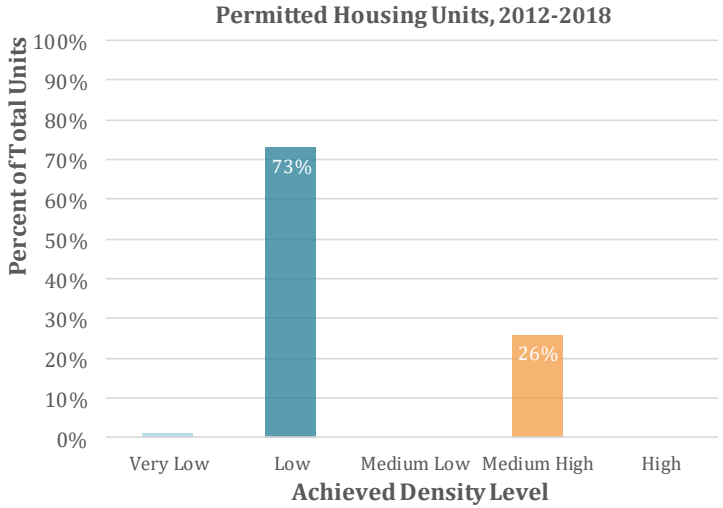
Since 2006, Unincorporated King County has grown at 104% of the pace needed to achieve its 2035 housing growth target of 12,837 units. During this period, the total number of housing units in Unincorporated King County grew by roughly 15%. At this current rate, Unincorporated King County is over the production pace needed to meet its 2035 growth target, and needs to grow at an annual rate of 1% to reach its remaining target by 2035.

### Residential Achieved Densities

| Zoned Density (du/acre) | | Gross Area (acres) | Critical Areas (acres) | Public Purpose (acres) | ROWs (acres) | Net Area (acres) | Total Units | Achieved Density (DU/acre) |
|---|---|---|---|---|---|---|---|---|
| Very Low | 0 - 4 du/acre | 110.3 | 0.7 | 0.0 | 1.7 | 107.9 | 526 | **4.9** |
| Low | 4 - 10 du/acre | 169.4 | 1.6 | 0.0 | 6.0 | 161.9 | 732 | **4.5** |
| Medium Low | 10 - 24 du/acre | 25.9 | 0.0 | 0.0 | 1.9 | 24.0 | 208 | **8.7** |
| Medium High | 24 - 48 du/acre | 17.9 | 0.0 | 0.0 | 0.0 | 17.9 | 179 | **10.0** |
| High | 48 & up du/acre | 24.5 | 0.0 | 0.0 | 0.0 | 24.5 | 684 | **27.9** |
| | **Total** | **348.1** | **2.3** | **0.0** | **9.6** | **336.2** | **2,329** | **6.9** |

| Achieved Density Level | Net Area (acres) | Total Units |
|---|---|---|
| Very Low | 36.7 | 31 |
| Low | 286.1 | 1,699 |
| Medium Low | 0.0 | 0 |
| Medium High | 13.7 | 600 |
| High | 0.0 | 0 |
| **Total** | **336.5** | **2,330** |



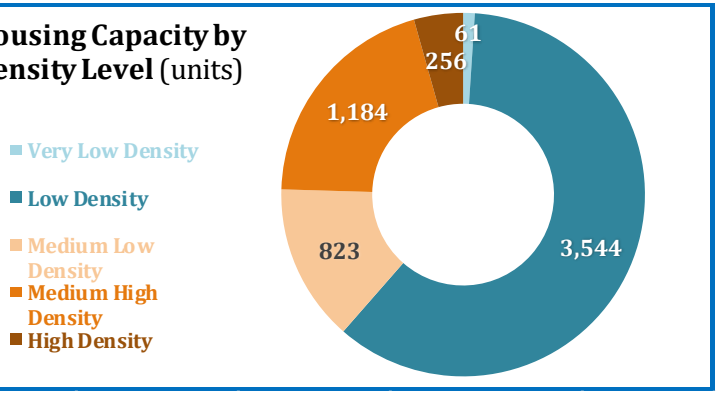



## Urban Unincorporated - Residential Land Supply and Capacity

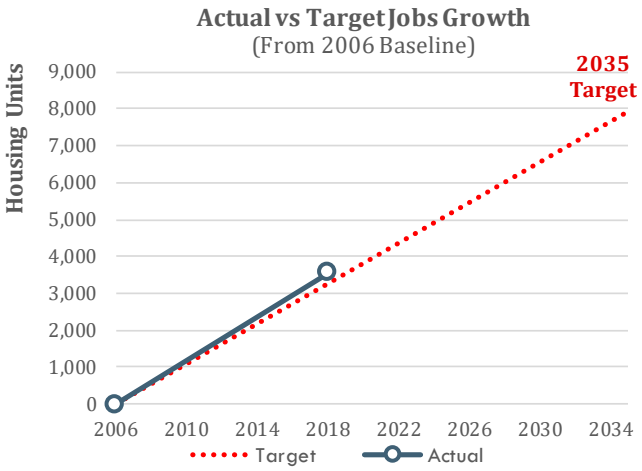
| Assumed Density Level | Vacant/ Redevelopable | Gross Acres | Critical Areas | Infrastructure Constrained Area | ROW & Public Purpose Discount | Market Factor (low/high) | Net Available Acres | Assumed Densities (low/high - units/acre) | Net Capacity (units) |
|---|---|---|---|---|---|---|---|---|---|
| Very Low Density | Vacant Subtotal | | | | 51.00 | 0.0% - 30.0% | 79.67 | 0.1 / 2.6 | 55 |
| | Redev Subtotal | | | | 9.60 | 0.0% - 30.0% | 15.38 | 0.1 / 2.6 | 6 |
| | **Subtotal** | 1,525.40 | 324.80 | 221.72 | 60.59 | | 95.05 | | **61** |
| Low Density | Vacant Subtotal | | | | 386.36 | 0.0% - 50.0% | 565.97 | 4.3 / 8.9 | 2,962 |
| | Redev Subtotal | | | | 91.45 | 0.0% - 50.0% | 131.00 | 4.3 / 8.9 | 582 |
| | **Subtotal** | 1,062.80 | 499.00 | 139.37 | 477.81 | | 696.97 | | **3,544** |
| Medium Low Density | Vacant Subtotal | | | | 4.94 | 7.0% - 30.0% | 15.32 | 23.5 | 360 |
| | Redev Subtotal | | | | 6.12 | 7.0% - 30.0% | 19.89 | 23.5 | 462 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 11.06 | | 35.21 | | **823** |
| Medium High Density | Vacant Subtotal | | | | 4.70 | 0.0% - 50.0% | 11.46 | 36.0 / 42.1 | 480 |
| | Redev Subtotal | | | | 5.58 | 0.0% - 50.0% | 16.76 | 36.0 / 42.1 | 703 |
| | **Subtotal** | 64.80 | 7.20 | 0.19 | 10.28 | | 28.21 | | **1,184** |
| High Density | Vacant Subtotal | | | | 1.36 | 10.0% - 30.0% | 4.61 | 49.0 | 226 |
| | Redev Subtotal | | | | 0.20 | 10.0% - 30.0% | 0.65 | 49.0 | 30 |
| | **Subtotal** | 0.00 | 0.00 | 0.00 | 1.56 | | 5.26 | | **256** |
| All Zones | Vacant Total | | | | 448.36 | | 677.03 | | 4,084 |
| | Redev Total | | | | 112.94 | | 183.68 | | 1,783 |
| | **Total** | **2,653.00** | **831.00** | **361.27** | **561.30** | | **860.71** | | **5,867** |

| Capacity (units) | |
|---|---|
| Very Low Density Zones | 61 |
| Low Density Zones | 3,544 |
| Medium Low Density Zones | 823 |
| Medium High Density Zones | 1,184 |
| High Density Zones | 256 |
| *Capacity in Pipeline* | *0* |
| **Total Capacity (Units)** | **5,867** |
| Remaining Target (2018-2035) | 17,586 |
| **Surplus/Deficit Capacity (Units)** | **-11,719** |

**Housing Capacity by Density Level** (units)



# Urban Unincorporated - Employment Growth and Commercial/Industrial Development Trends




| Unincorporated King County Jobs Growth Target: 2006-2035 | 7,900 |
|---|---|
| 2006 Jobs (PSRC) | 12,843 |
| 2018 Jobs (PSRC) | 16,400 |
| **Total Jobs Growth** | **3,557** |
| **Remaining 2035 Target** | **4,343** |

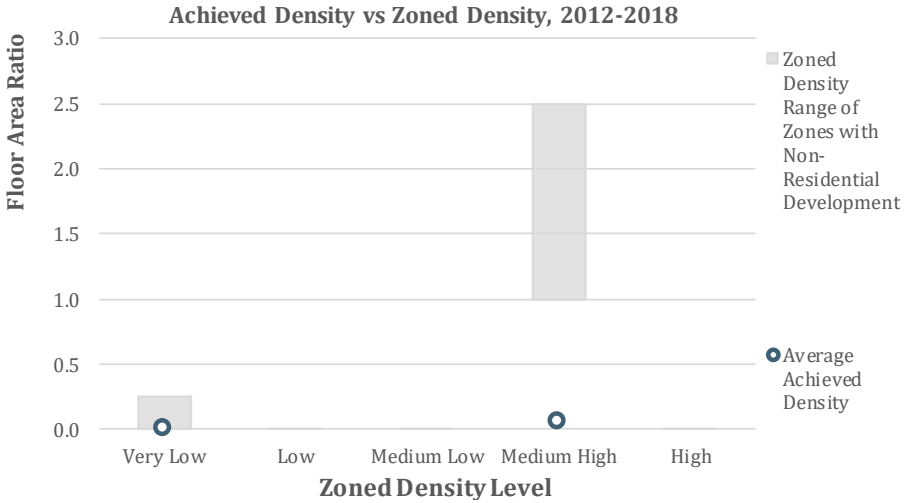
| % of Pace Needed to Achieve 2035 Jobs Target | Annual 2006-2018 Growth Rate | Annual 2018-2035 Growth Rate Needed to Meet 2035 Target |
|---|---|---|
| **108.8%** | **2.31%** | **1.56%** |

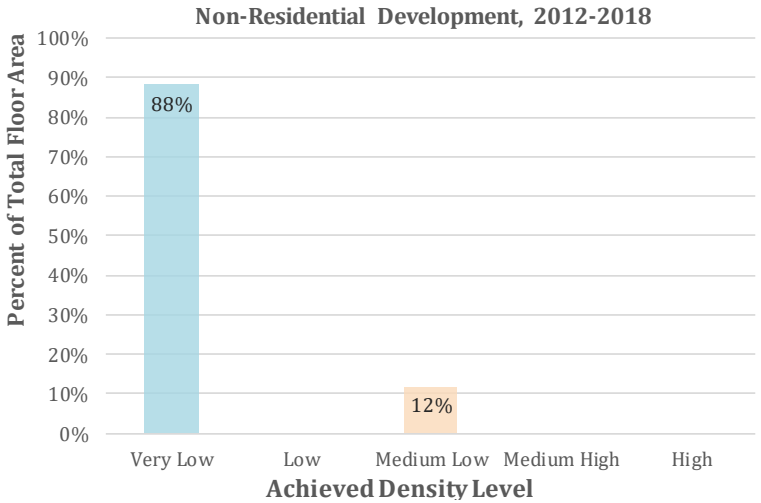
Since 2006, Unincorporated King County has grown at 109% of the pace needed to achieve its 2035 jobs growth target of 7,900 units. During this period, the total number of jobs in Unincorporated King County grew by roughly 28%. At this current rate, Unincorporated King County is over the pace needed to meet its 2035 jobs growth target, and needs to grow at an annual rate of 1.6% to reach its remaining target by 2035.

## Non-Residential Achieved Densities

| Zoned Density (FAR) | | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|---|
| **Very Low** | 0 - 0.35 FAR | 6,895,317 | 60,517 | **0.0** |
| **Low** | 0.35 - 0.5 FAR | 0 | 0 | |
| **Medium Low** | 0.5 - 1.0 FAR | 0 | 0 | |
| **Medium High** | 1.0 - 3.0 FAR | 3,201,325 | 186,848 | **0.1** |
| **High** | 3.0 & up FAR | 0 | 0 | |
| | **Total** | **10,096,643** | **247,365** | **0.0** |

| Achieved Density Level | Net Area (sq. feet) | Total Floor Area (sq. feet) | Average Achieved Density (FAR) |
|---|---|---|---|
| **Very Low** | 10,059,293 | 218,390 | **0.0** |
| **Low** | 0 | 0 | **0.0** |
| **Medium Low** | 37,350 | 28,975 | **0.8** |
| **Medium High** | 0 | 0 | **0.0** |
| **High** | 0 | 0 | **0.0** |
| **Total** | **10,096,643** | **247,365** | **0.0** |



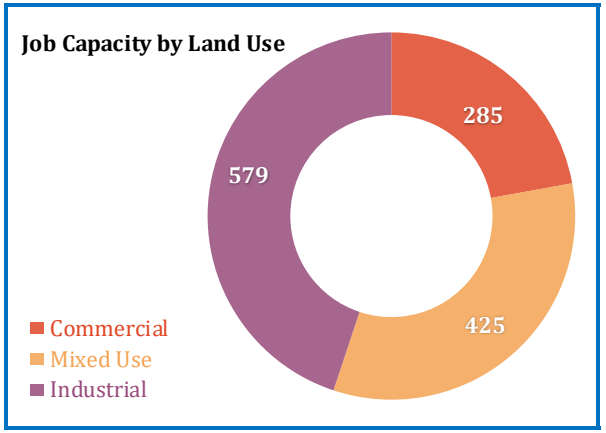



## Urban Unincorporated - Commercial/Industrial Land Supply and Job Capacity

| Land Supply | Gross Area (acres) | Critical Areas (acres) | ROWs (acres) | Public Purpose (acres) | Initial Land Supply | Market Factor | Buildable Area (acres) |
|---|---|---|---|---|---|---|---|
| **Vacant / Redev.** | | | | | | | |
| Commercial | 4.6 | 1.9 | 0.1 | 0.4 | 2.2 | 10% - 40% | 1.6 |
| Mixed Use | 79.3 | 8.0 | 3.6 | 10.7 | 57.0 | 0% - 50% | 40.1 |
| Industrial | 154.3 | 47.7 | 5.3 | 16.0 | 85.3 | 0% - 30% | 72.8 |
| **Non-Res Land Total** | **238.2** | **57.6** | **9.0** | **27.5** | **146.9** | | **114.5** |

| Job Capacity by Assumed Density Level | # | % |
|---|---|---|
| Very Low Density | 1,004 | 78% |
| Low Density | 0 | 0% |
| Medium Low Density | 0 | 0% |
| Medium High Density | 285 | 22% |
| High Density | 0 | 0% |
| | | |
| *Capacity in Pipeline* | | *0* |
| **Total Capacity (jobs)** | | **1,289** |
| Remaining Target (2018-2035) | | 5,468 |
| **Surplus/Deficit Capacity (jobs)** | | **-4,179** |

| Job Capacity by Land Use | Net Buildable Area (mil.sq.ft.) | Assumed Density Range (FAR) | Existing Floor Area (million sq.ft.) | Floor Area Capac. (million sq.ft.) | Sq. ft. per Job | Job Capacity |
|---|---|---|---|---|---|---|
| **Commercial** | | | | | | |
| Vacant | 0.07 | 2.50 | 0.00 | 0.18 | 350 / 625 | 285 |
| Redevelopable | 0.00 | 2.50 | 0.00 | 0.00 | 350 / 625 | 0 |
| **Commercial Total** | **0.07** | **2.50** | **0.00** | **0.18** | **350 / 625** | **285** |
| **Mixed-Use** | | | | | | |
| Vacant | 0.95 | 0.17 / 0.25 | 0.00 | 0.20 | 0 / 660 | 386 |
| Redevelopable | 0.79 | 0.17 / 0.25 | 0.18 | 0.02 | 0 / 660 | 39 |
| **Mixed Use Total** | **1.75** | **0.17 / 0.25** | **0.18** | **0.22** | **0 / 660** | **425** |
| **Industrial** | | | | | | |
| Vacant | 1.12 | 0.25 | 0.00 | 0.28 | 0 / 1200 | 255 |
| Redevelopable | 2.05 | 0.25 | 0.13 | 0.38 | 0 / 1200 | 324 |
| **Industrial Total** | **3.17** | **0.25** | **0.13** | **0.66** | **0 / 1200** | **579** |
| **City Total** | | | | | | |
| Commercial | 0.07 | 2.50 | 0.69 | 0.18 | 350 / 625 | 285 |
| Mixed Use | 1.75 | 0.17 / 0.25 | 0.91 | 0.22 | 0 / 660 | 425 |
| Industrial | 3.17 | 0.25 | 0.26 | 0.66 | 0 / 1200 | 579 |
| *Job Capacity in Pipeline* | | | | | | *0* |
| **City Total** | **4.99** | **0.17 / 2.50** | **1.86** | **1.06** | **0 / 1200** | **1,289** |



# Technical Appendices

This section contains the guidance documents and methodologies provided to King County jurisdictions throughout this study.

# Appendix A: Phase 1 Guidance - Achieved Density

# King County 2020 Urban Growth Capacity Study
# (Buildable Lands)
# **Guide for Local Government Reporting Template PART 1**

This document describes the data reporting process and template for local governments in King County to use to report consolidated data and analysis results in compliance with the Review and Evaluation/Buildable Lands requirement of the Growth Management Act. Jurisdictions should send complete sections of the reporting template to Rebeccah Maskin, rmaskin@kingcounty.gov, at the King County Office of Performance, Strategy, and Budget, for inclusion in the 2020 Urban Growth Capacity Study (formerly Buildable Lands Report) to the State of Washington.

Standardized reporting is necessary to provide King County (and the state Legislature) with information that is comparable across jurisdictions, and that may be aggregated into a countywide evaluation report. King County and the cities will collaborate to draft a countywide report in 2020. That report will present jurisdiction-by-jurisdiction reporting of recent development and capacity, as well as summaries for the county and UGA as a whole and regional geographies. The template and guide include prompts for standardized technical documentation, which is crucial to making the Buildable Lands analyses both transparent and defensible to public officials, major stakeholders, and the public. An interjurisdictional group of planning and technical staff reviewed the Local Government Reporting Template and Guide in 2019 for both its content and format.

Under the current schedule, data reporting for the 2020 report will be phased over 2019. Reporting for Part 1 should be completed and submitted back to King County by June 1st, 2019. Part 2 will be sent out in mid-2019. Data will be reviewed and compiled by King County staff in coordination with local planning staff on the Interjurisdictional Team, and sent back to cities for review, in late fall 2019.

For staff that has worked on buildable lands reports in the past, this cycle's reporting will be different, particularly for residential development. The King County GIS Center is completing an initial analysis of residential development over the reporting period (2012-18) that aims to provide the bulk of residential reporting data. Cities will review this data, adding local detail from permits or development plans, to accurately calculate achieved densities over the reporting period. The GIS analysis, and further instructions, will be sent out after this guide, in March 2019.

This guidance is organized into two parts covering the three major questions the Urban Growth Capacity Study answers. Part 1 will cover reporting on the first question. Part 2 will cover the second and third questions, and will follow Part 1 reporting. The parts and their different sections are:

**PART 1:**

- ***I. Are Zoned Densities Being Achieved?***
  - ***A. Achieved Densities 2012-2018 (Reporting Tables 1-7)***
  - ***B. Achieved Density Documentation and Background (Reporting Tables 8-10)***

**PART 2:**

- ***II. Are Growth Targets Being Met?***
  - ***A. Demand for Development: Remaining Growth Targets***
- ***III. Is there Sufficient Capacity for Remaining Growth Targets?***
  - ***A. Land Supply and Capacity Inventory***

The template tables in the Excel workbook that accompanies this document are to be filled in by all jurisdictions, and returned to King County.[1]
This document describes these template tables and instructs on how to fill out the template and provide documentation on data sources and methodology. *Not all tables will apply to every jurisdiction*. Tables for data that are not relevant to local situations should be labeled to indicate "not applicable," with justification, e.g., "No multifamily development during reporting period."

Thank you for your assistance in completing the reporting template!

[1]Please email completed reporting documents to rmaskin@kingcounty.gov. If electronic submission is not possible, please contact Rebeccah Maskin at 206-263-0380.

## I. Are Zoned Densities Being Achieved?

### *A. Measuring Achieved Densities (2012-2018)*

Background

Section IA consists of Tables 1-6, and collects data on residential and non-residential development activity for the full 6-year review and evaluation period (2012-2018).[2] This data will come from a parcel-based analysis described below, and building permits for new development between 2012 and 2018. After compiling development data from the parcel-based analysis and building permits, residential units, square footage built, and net land area are aggregated by zone, and the densities achieved over the review period are calculated. These densities will be used in Part 2 to calculate capacity of developable land.

Local reporting on residential data has two steps: 1.) reviewing and supplementing a parcel-based analysis of new residential development, and 2.) reporting on any additional development permitted during the review period. The parcel-based analysis is the starting place for residential data collection in the Urban Growth Capacity Study. It was designed to replace the majority of plat and permit reporting by identifying new residential development on parcels that changed boundaries or added residential units 2012-2018. Permit reporting on single family and multifamily/mixed-use development may still be necessary for developments not identified in the parcel-based analysis data, and to review or supplement the parcel-based analysis with project data (for example, non-buildable critical areas area).

New non-residential development will be addressed through permit reporting.

Any reporting on permitted development should capture new residential units or non-residential space that came online between January 1st, 2012 and December 31st, 2018. Permits finaled or completed between these dates provide the best estimate of completed development. If your jurisdiction does not uniformly track completed permits, issued permits may be used, so long as the development was demonstrably completed between 2012 and 2018. Please document the basis for how permits are selected to cover the review period.

How to fill out the tables

**Table 1** should be filled in with zone level data, summarized from the parcel-based analysis. The forthcoming parcel-based analysis packet will contain tables and maps of plat and parcel level (identified by parcel identification number (PIN)) development over the review period. Your review of the gross development area and residential units developed, and the provision of any constrained critical areas data, is essential for accurately estimating the net density achieved by recent development.

Because the source for this analysis is parcel data, public right-of-way, tract parcels, open water, and additional public purpose parcels commonly found in formal plats, have already been removed from the "gross" development site area presented in this analysis. However, additional constrained critical areas outside of tract or public purpose parcels need to be reported, so that they can be removed from the gross site area to calculate the net buildable area. For short plats or other residential development identified in the parcel-based analysis, constrained areas of developed parcels (for example, private roads or retention ponds), in addition to critical areas, *may* need to be reported to subtract from the gross site area.

A general flow for review the parcel-based analysis follows below. More specific instructions will be included with the parcel-based analysis when it is sent in March.

[2] Countywide analysis requires consistency across jurisdictions on the time frame of the development history data. Time frames for growth monitoring activities by individual jurisdictions will vary, based on the adoption date of comprehensive plans and other factors.

1. Review the parcel-based analysis for location, number of units built, and gross site area to verify the amount and location of development over the review period.
    a. The analysis is grouped by plat or parcel PIN.
    b. Shapefiles of the identified parcels are also available.
    c. Review the preliminary achieved densities, unit totals, or locations for anomalies (e.g., a density much higher or lower than expected for its zone)
    d. Correct any of the raw data in the parcel-based analysis (e.g., number of units, gross site area).
    e. If the parcel-based analysis captures development that should not be included (because it did not happen during the review period, or did not add residential units), note the parcels affected, and exclude that development from the reporting in Table 1.
2. Identify if there are other significant developments not included in the parcel analysis, from permit or other development sources.
    a. Add the number of units, gross site area, critical areas, public purpose area, right-of-way area, to the parcel-based analysis via Tables 2 and 3. Instructions follow Table 1 below.
3. Sum the number of residential units and gross area by zone and enter it into Table 1, columns A and B.
4. Calculate the square footage of constrained critical areas on developed plats/parcels included in the parcel-based analysis. Sum by zone and add to column C in Table 1.
5. Calculate the square footage of any other constrained area for developed parcels included in the parcel-based analysis, Sum by zone and add to the "D" columns in Table 1.
    a. Only complete this step as necessary. You do not need to compute public right-of-way and tract parcels that were already removed from the gross area as a part of the parcel-based analysis. Just include any additional constrained areas. Be mindful of short plats or subdivisions that might have private roads or environmentally constrained areas outside of tract parcels.
    b. "Public Purpose Area" refers to drainage/retention areas, open space, or other public facilities, outside of tract parcels.
6. If the zone has mixed-use development, please indicate "yes" in the "mixed-use development" column.
    a. Reporting on the share of mixed use development in residential/non-residential use will be captured the non-residential permit analysis in Table 6.

If the parcel-based analysis does not serve as a helpful starting point for reporting residential development accurately, please contact rmaskin@kingcounty.gov.

Table 1: Residential Parcel-based Analysis Summary

| | A | B | C | D1 | D2 | E | | |
|---|---|---|---|---|---|---|---|---|
| **Zone** | **2012-18 Developed Gross Site Area** | **2012-18 Developed Parcel Units** | **Critical Areas** | **Public Purpose Area** | **Right-of-way Area** | **Net Buildable Area** | **Achieved Density** | **Mixed-use Development?** |
| | Sq Ft | DU | Sq Ft | Sq Ft | Sq Ft | Acres | DU/acre | Y/N |
| | Summed from parcel-based analysis | Summed from parcel-based analysis | *REPORT HERE* | *REPORT HERE* | *REPORT HERE* | *Calculated:* (A-(C+Ds))/ 43,560 | *Calculated: B/E* | |

**Tables 2 and 3** collect single family and multifamily/mixed-use residential projects, additional to the parcel-based analysis. Use these tables to document development not captured in the parcel-based analysis. Please report new units by zone, gross area from the developed parcels, critical areas, and other public purpose and right-of-way area. Reporting should be by year, by zone when possible.

Table 2: Single-Family Residential Building Permits*

| | | A | B1 | B2 | B3 | C | D | |
|---|---|---|---|---|---|---|---|---|
| **Zone** | **Permit Year** | **Gross Area** | **Critical Areas** | **Public Purpose Area** | **Right-of-way Area** | **Net Buildable Area**** | **Number Units** | **Achieved Density** |
| | | Gross site Acres | Acres | Acres | Acres | Acres (calculated: A-(B1+B2+B3)) | DUs | DUs/Acre (calculated: D/C) |
| | | | | | | | | |
| **Document permit data sources used here.** | | | | | | | | |

* Each line in this table should represent all permits issued in a single year in a zone.
** Net buildable area equals parcel area, less critical areas and other constrained area. Be mindful of short plats and parcel subdivisions with right of way or other public purpose easements. These areas should be removed from the net buildable area.

**Table 3** is for reporting on multifamily and mixed-use development. Reporting on multifamily permits is similar to reporting on single family development in Table 2. Mixed-use development refers to developments with both residential and non-residential components, and reporting requires a few more steps:

- Report only on the residential portions of mixed-use development here; non-residential portions will be captured in Table 6.
- To identify a mixed use project, mark "Yes" in the "Mixed-use Project" column.
- To assist with calculating mixed-use capacity later on, it is important to report the share of residential development in the mixed-use development in column A of Table 3.
    - Calculate this by dividing the total built square footage (floor area) of the mixed-use development by the amount of built square feet in residential use.
    - When totaling the development floor area for a mixed-use development, do not include the area of parking structures, public plazas or other amenity spaces in the gross or net floor area/built square feet.
    - It's ok if development is captured in the parcel-based analysis and does not appear in Table 3. The non-residential share will be captured in Table 6.

This table is designed to calculate achieved density in dwelling units per acre. If your city regulates density by Floor Area Ratio (FAR), instead of reporting dwelling units in column E, report the amount of residential floor area constructed, and convert the net buildable area acreage to square feet. Indicate the use of FAR densities in the table documentation.

Table 3: Multifamily Building Permits, Including Residential Portions of Mixed-Use Projects

| | | | | A | B | C1 | C2 | C3 | D | E | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **Zone** | **Permit Year** | **Project Name** | **Mixed-use Project** | **% of Mixed-use in Residential** | **Gross Area** | **Critical Areas** | **Public Purpose Area** | **Right-of-way Area** | **Net Buildable Area** | **Number Units** | **Achieved Density** |
| | | (If applic.) | Y/N | % | Acres | Acres | Acres | Acres | Acres (calc'd: B-(C1+C2+C3)) | DUs | DUs/Acre (calc'd: E/D) |
| | | | | | | | | | | | |
| **Document permit data sources or FAR densities used here.** | | | | | | | | | | | |

**Table 4** tallies demolitions, plus accessory dwelling units (ADUs) and conversions. For projects adding units through ADUs or conversion, include the number of units already existing on the parcel and the parcel area, to calculate an achieved density for these types of developments. For demolitions, report the number of units demolished, where no replacement or additional units were constructed.

Table 4: Other New Units and Demolitions*

| | A | B | C | D | | E | |
|---|---|---|---|---|---|---|---|
| **Zone** | **Number of ADUs** | **Number of Units Added through Conversion** | **Pre-existing Units** | **Parcel Area** | **ADU/Convert Achieved Density** | **Number of Demolished Units** | **Net Other New Units** |
| | | | For ADUs and Conversions | For ADUs and Conversions | DUs/Acre (calc'd: [A+B+C]/D) | | Calc'd: A + B - E |
| | | | | | | | |

* Each line in this table represents all permits completed in a zone, single year.

**Table 5** summarizes the permit data and parcel-based analysis (Tables 1, 2, and 3), and calculates achieved density in each zone.

Table 5: Residential Achieved Densities—Consolidation by Zone*

| | A | B | |
|---|---|---|---|
| **Zone** | **Total Residential Units** | **Total Net Buildable Area** | **Overall Achieved Density** |
| | Table 1 column B + Table 2 column D + Table 3 column E | Table 1 column E + Table 2 column C + Table 3 column D | A/B |

* Aggregate by zone for all years

**Table 6** reports data on building permits for employment-based uses by zoning type, including the non-residential components of mixed-use development. The types of uses to include in this table are commercial and industrial developments where employees are located, and are broadly referred to as "commercial" or "non-residential," for simplicity. This includes developments on publicly owned lands, so long as they are employment sites (like a school or office building). Do not report on any tenant improvements or temporary/moveable structures. "Mixed-use" developments include residential and non-residential components. Commercial developments with different non-residential uses (e.g., a hotel and office), are not counted as mixed-use developments.

Purely commercial or industrial developments should be reported by zone, by year, with the gross parcel/site area of the development, constrained critical areas, right-of-way, and public purpose areas, and floor area (the built square footage) of the development. Do not include parking structures, plazas, or amenity spaces as built floor area. The floor area ratio (FAR) is the measure of non-residential density, and is calculated from the floor area and the net site area fields. It expresses the ratio of the amount of built space to the area of the site/parcel.

Mixed-use development requires additional reporting on the portion of development in non-residential use. For mixed-use developments:

- To identify a mixed use project, mark "Yes" in the "Mixed-use Project" column.
- Report the total built square feet for the project in column F1
- Report the non-residential built square feet for the project in column F2
- To assist future mixed-use capacity calculation, report the share of commercial development in the mixed-use development in column A.
    - Divide the total built floor area (F1) of the mixed-use development by the amount of built square feet in commercial use (F2).

Table 6: Commercial and Industrial Building Permits, Including Commercial Portions of Mixed-use Projects

| | | | | A | B | C1 | C2 | C3 | D | E | F1 | F2 | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Zone** | **Permit Year** | **Project Name** | **Mixed-use Project** | **% of Mixed-use in Commercial** | **Gross Site Area** | **Critical Areas** | **Public Purpose Area** | **Right-of-way Area** | **Net Site Area** | **Net Site Area** | **MU Floor Area** | **Commercial Floor Area** | **Achieved FAR** |
| | | (If applic.) | Y/N | Calc'd: F2/F1 | Acres | Acres | Acres | Acres | Acres (calc'd: B-(C1+C2+C3)) | Sq. Ft. (calc'd: D* 640) | Sq. Ft. (MU dev. Only) | Sq. Ft. | Calc'd: F2/E |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| **Document permit data sources used here.** | | | | | | | | | | | | | |

**Table 7** consolidates the annual or project level data from Table 6 by zone. Simply sum the built floor area and net site area from Table 6 by zone to calculate the achieved density for each zone, expressed in floor area ratio (FAR).

Table 7: Non-residential Achieved Densities—Consolidation by Zone*

| | A | B | |
|---|---|---|---|
| **Zone** | **Total Floor Area** | **Total Net Site area** | **Overall Achieved Density (FAR)** |
| | Table 6, column F2 | Table 6, column E | A/B |

### *B. Achieved Density Documentation and Background*

Background

Section IA presented data on recent development activity, particularly achieved densities averaged across the six-year review period. Section IB provides a space for further analysis of achieved densities to consider a range of factors responsible for the densities achieved. The objective is to consider on the causes leading to the densities achieved in preparation for Part 2 reporting, where "assumed" densities are selected to apply to vacant and redevelopable land to calculate remaining capacity.

This section provides a space to reflect on the densities achieved in each zone, whether they approximate expected densities, and why they may not.

Buildable lands legislation now requires jurisdictions to review their development regulations for changes during the evaluation period that have significantly affected the supply of developable land (either positively or negatively). Additionally, cities must account for circumstances where zoned densities are not achieved during the evaluation period. Non-achievement of zoned densities may necessitate the adoption of reasonable measures in 2023 comprehensive plans. These requirements will be addressed in Part 2 of reporting, but the context behind the achieved densities will be collected while it is freshly in mind.

How to fill out the tables

For Tables 8 and 9, for each zone, enter the achieved densities (from Tables 5 and 7), or for zones where no development occurred during the review period, enter "0" for achieved density. Then, use the documentation space to supply any information documenting or exploring factors responsible for the achieved density. Is the density higher or lower than expected? Have there been significant recent changes in the zone? Provide any qualitative or quantitative data that helps contextualize the densities achieved.

The following describes some factors that can influence achieved densities.

*Inadequate Density Data*

Some zones may have had little or no development activity during the review period. If no activity occurred, there is no direct data from which to project future densities. In these situations, describe why development has not occurred. In Part 2 of reporting, when it's time to select an assumed density, development in other similar land use categories, including similar zones from other cities, analysis of not-yet-built development projects, and assumptions from code, can help inform assumed densities. It may be helpful to note these any of these data points at this time.

*Planned Development*

Issued permits, preliminary plats, or developer agreements for permitted or under-construction development that will come online after the end of the review period (12/31/18) can provide a fuller story of development within a zone. Do these types of development add any detail to the achieved density of a zone? Summary analysis of data on planned development can be provided now.

*Changes in Regulations*

In several jurisdictions, significant changes to zoning and other land use regulations, like rezones, upzones, changes to setbacks or impervious surface requirements, occurred during the review period. The impacts of such changes will likely be reflected, in part, in the density trends analysis. Note whether any of these circumstances affecting achieved densities apply over the review period.

*Shifting Jurisdiction*

For cities that annexed large areas during the review period (2012-2018), a significant number of the development projects included Section 1 tables may have been approved under King County's jurisdiction. The type and density of development approved by the county may not be representative of what is likely to occur under municipal jurisdiction in these areas. Density findings that show significant differences between county and city approved development may support alternative future assumptions about the capacity of land that is now incorporated.

*Infrastructure Gaps and Limitations*

Limited infrastructure availability may keep densities low in the foreseeable future, despite zoning that allows for higher densities. In most cases, this will be reflected in the achieved density data. Alternatively, infrastructure deficits that may have depressed achievable densities during the review period, may be resolved in the near future, allowing for higher density development within the planning horizon. Note if these circumstances apply.

Table 8: Document Achieved Residential Densities

| **Zone** | **Achieved DUs/Acre** | **Reasons/Documentation** |
|---|---|---|
| | From Table 5 | Add any footnotes from Tables 1-5, and any supplemental documentation on the densities achieved in each zone. |
| | | |
| | | |

Table 9: Document Achieved Non-Residential Densities

| **Zone** | **Achieved FAR** | **Reasons/Documentation** |
|---|---|---|
| | From Table 7 | Add any footnotes from Table 6-7, and any supplemental documentation on the densities achieved in each zone. |
| | | |
| | | |

Table 10 is similar in intent as tables 8 and 9, but examines the split of uses in zones allowing mixed-use development. Are certain zones experiencing more residential or commercial development than expected? Is mixed-use development tilted towards one use? Have development regulations only recently allowed mixed use? Report any qualitative or quantitative data to describe your city's outcomes.

Table 10: Achieved Shares of Residential and Commercial Development in Mixed-use Zones

| **Zoning** | **Achieved % of Floor Area Developed Residential** | **Achieved % of Floor Area Developed Commercial** | **Reasons/Documentation for Mixed-use Use Splits** |
|---|---|---|---|
| Zones w/ Mixed-use dev. only | calculated: *1- Table 6 column A* | From Table 6 column A | |
| | | | |

# Appendix B: Phase 2 Guidance - Land Supply

## I. Overview of the Urban Growth Capacity Study

The Urban Growth Capacity Study, also known as "buildable lands," is a collaboration between cities and King County to analyze recent land use development trends, and to compare those trends to comprehensive plans and growth targets, providing meaningful information on development and capacity for updating growth targets and comprehensive plans. King County coordinates the development of the report, and each city provides and a standardized set development data for their jurisdiction. In phase one of data collection, earlier in 2019, cities collected data on recent development 2012-18, in an effort to determine the zone-based achieved development densities. In phase two of data collection, cities and King County will review their urban land area to identify the supply developable land available over the next 20 years. This document will guide planners and analysts through that process. Phase three of data collection will take place in early 2020 and focus on calculating capacity and new requirements of the buildable lands process.

## II. Purpose of Data Collection Phase 2

Phase one of data collection for the Urban Growth Capacity Study focused on calculating the achieved densities of recent development. Phase two will identify developable vacant and redevelopable lands to combine with the achieved density data to ultimately calculate capacity. Phase two also concerns the quantification of the planned density for each zone in your jurisdiction, to understand whether densities are being achieved as planned. Planned densities also help determine whether developable land is redevelopable or not. Planned densities are different from *achieved* densities (calculated in phase 1), in that they are expected densities based on your jurisdiction's code and development regulations. Planned densities will be detailed further in section III below.

This guidance will help you define vacant and redevelopable developable land, and identify the densities being planned for in each zone. Your task is then to use those definitions to quantify developable land and report planned densities. In the following sections we'll describe the details for the types of data to provide to complete phase two of data collection.

Ideally, you'll submit GIS-based zone- or parcel-level data identifying developable residential and non-residential land, and tabular data expressing the planned densities for each zone in your jurisdiction. Tables of data, in lieu of GIS data may be submitted as a last resort. If you do not have GIS to assist in this exercise, King County has resources available to support your efforts. Don't hesitate to request technical support by contacting Rebeccah Maskin, rmaskin@kingcounty.gov or 206-263-0380.

King County is requesting Phase two data to be returned by January 7, 2020.

## III. Planned Density Reporting

Planned densities are collected for two reasons. First, as a part of new requirements to the GMA buildable lands statute[1] passed by the State Legislature in 2017, King County jurisdictions are now required to evaluate whether planned densities are being achieved in the 2020 Urban Growth Capacity Study. Achieved densities (evaluated in Phase one reporting) will be compared to planned densities to as one indicator of whether development is occurring as planned.

[1] RCW 36.70A.215

Second, planned densities are used in the identification of redevelopable lands. Since the 2007 Buildable Lands Report, King County has recommended jurisdictions identify redevelopable lands by comparing the existing density of development to its planned, or potential, density, particularly for residential and mixed use lands.

A planned density should be reported for each zone where people live or work in your jurisdiction. The next section will describe how King County is defining "planned densities."

### *Defining Planned Densities*

For the Urban Growth Capacity Study, **planned densities will be defined as the "as-of-right" density granted by code for each zone, that is the maximum allowed density without any bonus or incentive density**. In many communities, residential densities are defined in dwelling units per acre (DU/acre) or by minimum lot size, while non-residential zones use development regulations or Floor Area Ratio (FAR) to define the allowed density. The following sections describe selecting or calculating DU/acre and FAR for each zone. While this guidance will provide instructions for relatively precise calculations, these should be reviewed with your professional judgement for the intent of your comprehensive plan and implementing code.

### *Residential Densities*

For this analysis, we are requesting residential planned densities to be reported in terms of dwelling units per acre (DU/acre), unless your jurisdiction solely uses FAR to define density. Some jurisdictions use minimum lot sizes to define residential densities, particularly in single-family zones. Minimum lot sizes can easily be converted to DU/acre by dividing 43,560 square feet (one acre) by the minimum lot size. The result is the maximum dwelling units/acre allowed. Residential densities for mixed use zones should also be supplied.

### *Non-residential Densities*

Densities in commercial and industrial zones are less frequently defined as explicitly as residential zones, typically relying on bulk, height, and use regulations to define the size or density of a development. Some jurisdictions have used floor area ratio (FAR) to define the density of non-residential development, and this is what is requested for non-residential planned density reporting. If your jurisdiction does not use FAR to define density, Table 1a in the data reporting tables template is a "FAR calculator" table and instructions to assist in determining a FAR-based density. Please provide non-residential densities for mixed use zones as well as residential densities.

### *Planned Density Template Table*

**Planned density data should be reported in Table 1: Planned Densities**, which has the following format:

| | Select: | | | | | | Optional Fields (to assist with density calculation) | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Zone | Residential | Non-Residential | Mixed-use | Other | DU/acre | FAR | Minimum Lot Size | Maximum Height | Estimated Stories | Maximum Lot Coverage | Front Setback | Rear Setback | Side Setbacks |
| | | | | | | | | | | | | | |

The following table describes the reporting table with field-level definitions and instructions for completing the table. Note that the optional fields duplicate fields in the FAR calculator. Store the values

used in the FAR calculator in Table 1, or by duplicating the FAR calculator in that tab of the template spreadsheet.

| | | |
|---|---|---|
| | Zone | Zone name/ID. Include all zones where people live and/or work |
| Select: | Residential | Characterize the zone by its dominant use, mark with an "x" |
| | Non-Residential | |
| | Mixed-use | |
| | Other | |
| | DU/acre | Where residential development is allowed, fill in the as-of-right maximum density allowed, per the guidance, in dwelling units per acre |
| | FAR | Where non-residential development is allowed, fill in the as-of-right maximum density allowed, per the guidance, in FAR. Use the following optional fields or the FAR calculator, as needed. |
| Optional Fields (to assist with density calculation) | Minimum Lot Size | Residential zones in particular. To convert to dwelling units per acre, divide the minimum lot size by 43,560. |
| | Maximum Height | Non-residential zones; maximum building height allowed in zone. Estimate a maximum height if "unlimited," not specified, or site specific. |
| | Estimated Stories | Non-residential zones; estimate from the maximum height. A rule of thumb to approximate: divide by 10 and round down (e.g, 35' = ~3 stories). |
| | Maximum Lot Coverage | Non-residential zones; as a percentage expressed in code as maximum lot coverage, impervious surface coverage, or a maximum building size/development site (if 1 story only) |
| | Front Setback | Non-residential zones, in feet |
| | Rear Setback | Non-residential zones, in feet |
| | Side Setbacks | Non-residential zones, in feet |

## IV. Developable Land Supply Reporting

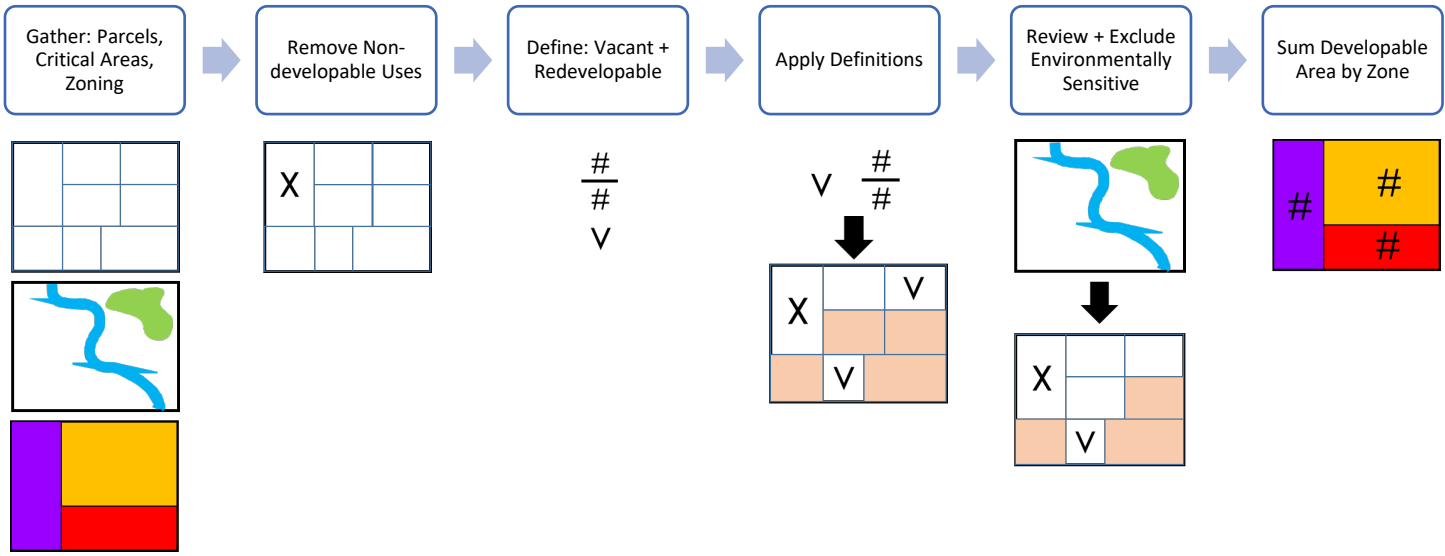
This portion of the analysis involves a jurisdiction-wide scan to quantify all land available for residential or commercial/industrial development for the next 20-year planning period. "Land supply" is the phrase used to refer to an inventory of land "suitable for development." Land supply inventories for each jurisdiction should strive for a snapshot of land with development potential as of January 2019, approximating the end of the most recent evaluation period (2012-2018). The land supply includes vacant and redevelopable lands

To quantify the developable land supply, jurisdictions will:

- Assemble necessary data for the entire jurisdiction, including parcel/assessor data, critical areas, and zoning.
- Define vacant and developable lands using a density and/or value threshold,
- Exclude land uses or parcels that are unlikely to develop for categorical reasons (e.g., parks, schools, public facilities, other institutions),
- Apply vacant and redevelopable land definitions to the parcel data,
- Review and refine the resulting developable land supply,
- Remove area for environmentally sensitive lands,

- Screen for infrastructure gaps, and
- Summarize developable land supply by zone.

The graphic below illustrates the process:




Later on in Phase 3 of data collection, cities will discount lands for area deductions for right-of-way and public purpose uses and apply a "market factor," to quantify capacity for housing and employment.

### *Data Needs for Identifying Developable Land Supply*

King County has supplied cities with a data package including a shapefile and spreadsheet of parcel and assessor data that contains land use, existing development, area, and valuation data. Cities should supply their own zoning and critical areas data to relate to the parcel data. Planned densities from Section II should also be related to the data for use in determining if land is redevelopable. More information on defining redevelopment and vacant land thresholds follows below.

*Parcel Data*

Parcel data comes from the King County Assessor. It was downloaded in September 2019, to account for lag in data transmission, and approximates valuation and development on the ground in January 2019. This data source was selected because it is comprehensive and relatively consistent across the county, but cities should feel free to supplement it with their own data, if it improves accuracy. King County has related tables from the assessor database and selected fields that will be helpful for the land supply analysis. A field dictionary was included with the initial guidance email and data package. Data fields in the spreadsheet include: (a * indicates key data fields and blue text indicates calculated fields):

| |
|---|
| Major |
| Minor |
| PIN* |
| Jurisdiction |
| PropName |

| |
|---|
| PlatName |
| Owner |
| SqFtLot* |
| PresentUseCode |
| PresentUse* |

| |
|---|
| CurrentZoning* |
| PropType* |
| LandValue* |
| ImpValue* |
| ILR* |

| |
|---|
| SFunits |
| CondoUnits |
| AptUnits |
| TotalResUnits* |
| ResDensity* |
| BldgGrossSqFt* |
| FARexist* |
| YrBuilt |
| Address |
| CondoFlag* |

| |
|---|
| VacantFlag* |
| WaterSystem |
| SewerSystem |
| Access |
| TidelandShoreland |
| PowerLines |
| Contamination |
| ErosionHazard |
| HundredYrFloodPlain |
| SeismicHazard |

| |
|---|
| LandslideHazard |
| SteepSlopeHazard |
| Stream |
| Wetland |
| SpeciesOfConcern |
| SensitiveAreaTract |
| ParcelGroup* |
| EconomicUnitName |
| EconomicUnitPart |
| EconomicUnitParcelList |

To join the assessor data table to the parcel shapefile, use the PIN (parcel identification number) field. If you do not have staffing capacity to perform GIS analysis, please contact King County staff for assistance.

*Zoning Data*

While a zoning field is present in the parcel data, the value may not be the most current zoning for your jurisdiction. It is recommended that you overlay the parcel data with your current zoning to ensure that each parcel is related to the correct zone. While the parcel data represents early 2019, the zoning used should be the most current and forward looking as possible to reflect a truer picture of future development capacity over the planning period.

Critical Areas Data

Jurisdictions must deduct land from the set of potentially developable parcels that is constrained by environmentally sensitive areas. Environmental features associated with critical areas include wetlands, streams and other water bodies, steep slopes, geologic hazards, shoreline buffers and other features identified in a jurisdiction's update critical areas ordinance or other regulations. Ideally, jurisdictions maintain their own critical areas GIS data, and this should be used in the analysis. As a fallback for some areas of the county, cities may rely on critical areas GIS data provided by King County or state agencies. The parcel data also contains several fields that cities may be used as a backup for critical areas.

*Uses to Exclude from Analysis*

Certain development types or land uses should be removed from consideration as developable land supply. These include: public lands and facilities, religious institutions, cemeteries, golf courses, schools, landfills and quarries, railroads and utilities, and other miscellaneous institutional uses. These uses can be identified by the existing land use codes and other methods identified in the table below.

While these development types are generally not suitable for future development, exceptions exist, e.g., a churchyard might be planned for housing or a government agency might have plans to sell surplus property, and jurisdictions should use their best judgement to refine the results from a purely rule-based analysis. Red-colored comments in the table below identify cases to watch out for while broadly applying rules.

If your jurisdiction maintains a layer of parks and open space, consider using it to screen out parks or trail properties as well.

| Use Type | Identification Methods | Comments |
|---|---|---|
| Public facility or public ownership | KC Assessor indicates property tax exemption. PropType = X.<br><br>KC Assessor. Query Owner field for records containing strings, such as "CITY OF" or "SCHOOL."<br><br>KC Assessor. Query PresentUse field for codes indicating various public uses (e.g., 184 for public schools).<br><br>Individual jurisdiction parcel inventories of public facilities and parks. | Ownership may include city, school district, county, or state agencies.<br><br>Watch out for multiple spellings or abbreviations used for public agency names (e.g., Dept. vs. Department vs. DNR).<br><br>PropType query will select both "public" parcels as well as a number of additional parcels that fall into one of the categories below (e.g., church land, some railroad land, subsidized housing, and other non-profits). Exclusion of these parcels is consistent with additional categories described below.<br><br>PropType query will also select some parcels owned by individual homeowners who qualify for tax exemption. Such parcels should not be excluded from the inventory. |
| Religious institution use or ownership | PropType screen (see above).<br><br>Query for PresentUseCode = 165 (Church/Welfare/Relig. Srvc.)<br><br>Query Owner field for records containing strings, such as "CHURCH." | Query for Present Use will select only those parcels in church use; parcels in church ownership will be more completely selected using Owner name query.<br><br>Parcels in religious institution ownership, but not use, are more likely to be available for future development. Use discretion in selecting or excluding properties.<br><br>Queries for strings in Owner name field (here and below) will select some parcels not intended for exclusion (e.g., "JOHN CHURCH"). Un-select these records by visually screening selected set. |

| Use Type | Identification Methods | Comments |
|---|---|---|
| Cemeteries | Query for PresentUseCode = 179 (Mortuary/Cemetery/Crematory)<br><br>PropType screen (see above). | Will identify private mortuaries or other uses that may be redevelopable. |
| Golf courses | Query for PresentUseCode = 143 (Golf Course) | |
| Private schools | Query for PresentUseCode = 185 (Private School)<br><br>Taxpayer name contains the string "SCHOOL" | Not all private school uses should be removed from the inventory. Use best judgment. Large institutions are more likely to be stable uses than small private ones, such as day care centers.<br><br>PropType query (see above) will likely select many private, non-profit educational institutions, most of which should be excluded from the inventory.<br><br>Some school uses may appear as vacant per Assessor's records (e.g., playfields). |
| Landfills and quarries | Query for PresentUseCode = 138 (Mining/Quarry/Ore Processing), or 266 (public utility). | |
| Other institutional uses and institutional campuses | Query by PresentUseCode (various). | Hospitals (173), nursing homes (59), colleges and universities (185, 184, 56) government services (172), etc. |
| Railroads and utilities | Query for PresentUseCode = 332 or 261 (Right of Way/Utility, Road, Rail Terminal) and = 266 (Utility, Public).<br><br>Query Taxpayer Name field for records containing strings, such as "#RR#" or "BURLINGTON" | If not excluded from the inventory, many of these parcels will be misclassified as vacant. There are some parcels along RR ROWs that are of course, redevelopable. Make case-by-case determinations based on local knowledge. |

*Related Parcels*

The parcel/assessor data includes fields titled or beginning with "EconomicUnit." These fields are intended to assist in identifying properties or developments that should be considered as a single development, such as a parking lot and a store on separate parcels, or a large development spanning several parcels. The data are linked by their *EconomicUnitName*. If a parcel is not connected with others, *EconomicUnit* fields will be blank. Economic unit data can be helpful in screening parcels that may be identified as vacant or redevelopable because of a low value or vacant land use, but are not functionally available as such. Conversely, this might identify parcels where aggregation (treating several individual parcels as a single unit) might render a site as redevelopable.

*Major Planned Developments*

Parcels where large known future developments are located may also be excluded from the land supply analysis. Please **record the parcel PINs, zone, planned number of units and/or square feet, and anticipated year of completion in Table 5: Major Planned Developments**. This step is optional; use only as necessary and supported by data.

### *Defining and Identifying Redevelopable and Vacant Lands*

Jurisdictions' previously used definitions were included in the initial email with this guidance, in a PDF titled: "Past Vacant and Redevelopable Definitions." These definitions were used in the 2007 Buildable Lands Report, which what the last comprehensive compilation of developable land supply. Previous definitions for redevelopable and vacant lands are a good starting place for the 2020 Urban Growth Capacity Study, but jurisdictions should review and update assumptions for current circumstances. Generally, four definitions are recommended: a single definition for vacant lands (of all types), and separate thresholds for redevelopable single family, multifamily, and commercial/mixed-use lands. Fewer definitions are not recommended (unless a use is not applicable in your jurisdiction). **Record your selected definitions in template Table 3: Vacant/Redevelopable Definitions**.

*Vacant Land*

Vacant lands are devoid of development, or contain only low value accessory structures. King County advises using a two-part test of existing land use <u>and</u> an improvement value limit to define vacant land. Use the *Present Use* and *Improvement Value* fields in the parcel data, for example: *PresentUseCode* = 300, 301, 309, or 316 (Vacant), and/or *ImpValue* <$10,000, to query vacant parcels. A single-part test (only land use or only value) may alternatively be used.

Other undeveloped properties may not be classified with a vacant use code, like parking lots. These properties should be included as vacant land, unless local knowledge informs otherwise. Commercial parking lots have a present use code of 180, parking associated with other development is coded 159.

As another resource, the King County Assessor now includes a vacant lot table in the assessment data. Vacant lots are identified as those without any buildings present. These are identified in the field *VacantFlag* in the parcel data. Including a value-based screen to define vacant lands (to include parcels that are effectively vacant) is still recommended, and at least visually reviewing the results if using the *VacantFlag* field to identify vacant parcels.

After the vacant land definition has been applied to the data, review the results to identify that only vacant land has been included. In addition to reviewing the parcel attributes for identified vacant lands, aerial photography or site visits may be used to validate the results.

*Redevelopable Land - Residential*

Regardless of use, redevelopable land includes all developments that are not utilizing their full development potential. This can include partly developed land, infill development, properties that have been recently rezoned, or non-conforming uses.

There are multiple ways to classify redevelopable land. For residential lands, King County's preferred method uses a ratio of potential to existing density on a parcel to determine whether land is redevelopable. For example, if a city defined redevelopable land to be where existing development is less than two times the potential density for that property, a single family property on an acre lot is zoned for up to four units per acre, would be considered developable.

Drawing from King County studies of redeveloped land to inform redevelopable thresholds, defining a threshold between 2 and 3.5 is recommended. The threshold your jurisdiction selects may be influenced by development pressure and existing density, i.e., a lower threshold is be more appropriate for denser, rapidly developing jurisdictions. We recommend testing a 0.25-0.5 tolerance around your jurisdiction's past threshold and comparatively reviewing the resulting parcel output.

To use this method, follow these steps, using the provided assessor/parcel data:

1.) Review existing density. This has been calculated for parcels in the field *ResDensity*, by dividing the existing units by the parcel area to approximate the existing density.
2.) Calculate potential density. Using the Planned Density by zone reported in Table 1, and the parcel area from the assessor/parcel data, calculate the approximate potential units allowed on the parcel. Note: for this analysis, this is not the same as capacity. Capacity calculations for the Urban Growth Capacity Study are more refined and will be completed in Phase Three of data collection.
3.) Select a redevelopment threshold. Review the previous threshold, and make adjustments as described above.
4.) Query the results. Using the selected redevelopment threshold, query the parcel data to identify redevelopable lands.
5.) Review the results. Based on your professional judgement, local knowledge, site visits, or other screening factors listed below, exclude parcels that are unlikely redevelopment sites.

*Screening Results*

Consider the following additional rules and manual data screens to refine and finalize results from the redevelopable residential land supply identification.

**Condo ownership.** Condominium buildings may be excluded as redevelopable, as complex ownership makes redevelopment unlikely. Condo ownership is identified in the *PropType* field in the assessor data, with a value of "K."

**Townhouse Plats.** Townhouse plats or unit lot subdivisions are unlikely to redevelop on a parcel by parcel basis, and may be excluded from developable land supply.

**Homeowner Association Properties.** Covenant protected lands and structures (golf clubs, recreation centers, gyms) are unlikely to redevelop, and may be excluded from the developable land supply. These may be identified by a homeowner's association name in the *Owner* field.

**Higher value homes**. Crosscheck selected redevelopable parcels against value of single-family home. Highly valued homes may be less likely to subdivide. A recommended cut-off for this secondary screen is between $400,000 and $600,000—depending on the local market conditions. Consider your jurisdiction's, or the county median home value for reference. The King County Assessor's Local Scape tool can quickly provide this information for your jurisdiction.

**Recently developed properties**. Crosscheck selected parcels against year of construction (*YrBuilt*). Parcels with recently constructed residences are less likely to further subdivide over the remainder of the planning horizon. Year-built date cut-offs for this secondary screen should be made with respect to local development and market conditions.

**Building Footprints**. Visually inspect the location of existing buildings on smaller parcels (redevelopment ratio between 2 and 3) using GIS data for building footprints.

**Ground checks**. Spot check selected parcels against aerial imagery and/or field observations.

*Redevelopable Land – Non-residential + Mixed Use*

Setting redevelopable thresholds for mixed use, commercial, industrial zoned lands should be considered separately from residential lands. While a density-based ratio, as is recommended for residential lands, can be informative in some areas, particularly those facing significant development pressure, an improvement-to-land-value based ratio may also accurately identify properties likely to redevelop.

**Value-ratio method.** In the parcel/assessor data table, an improvement-to-land-value ratio has been calculated for each parcel (appraised improvement value divided by land value). A low ratio indicates more potential for redevelopment. Theoretically, the ratio reflects the potential profitability of more intensive use of a site relative to the revenue generating potential of the existing use. Typical threshold ratios for determining redevelopability range from 0.25 to 1. A threshold of 0.5 is recommended for most areas within the county. Jurisdictions experiencing more intense development pressure could consider a higher ratio.

**Density-ratio method**. Since planned densities for all zones are being evaluated for this analysis, using a density based filter is more possible than in the past studies. The existing FAR-based density is calculated and included in the parcel data, in the field *FARexist*. Relate this value to the planned FAR calculated for each zone to create a ratio of potential to existing density. Sorting and reviewing the range of results in GIS will be helpful to get a sense of the range in your jurisdiction. Starting with a ratio of 1.5 (potential-to-existing density), and testing a +/-0.5 tolerance is a good starting place for reviewing the redevelopable land supply that results. Jurisdictions with less non-residential development pressure would be advised to set a higher threshold.

Comparing density- and value-based methods is recommended in GIS, hard copy maps, or by site review.

*Screening Results*

Consider the following additional rules and manual data screens to refine and finalize results from the non-residential redevelopable land supply identification.

**Low-intensity uses.** Include additional parcels as redevelopable based on current land uses that are considered low intensity (e.g., surface parking, storage, single-family homes in commercial or industrial zones) relative to parcel size and location, and market demand for more intensive uses of these sites.

**Parcel size and shape.** Many parcels that turn up as redevelopable present challenges to redevelopment due to factors such as parcel size, shape, and fractured ownership with limited land assembly potential. Parcel data should be queried by size to identify and exclude sites that are too small to be redeveloped. Review maps of identified redevelopable parcels to identify potential parcel shape and assembly issues that warrant taking parcels out of the inventory.

**Recently developed properties**. Crosscheck selection against year of construction (*YrBuilt*). Parcels with recently constructed development are less likely to redevelop over the remainder of the planning horizon. Year built date cut-offs for this secondary screen should be made with respect to local development and market conditions.

**Condo ownership.** Condominium buildings may be excluded as redevelopable, as complex ownership makes redevelopment unlikely. Condo ownership is identified in the *PropType* field in the assessor data, with a value of "K."

**Site contamination.** Identify potentially redevelopable parcels that are constrained by on-site environmental contamination from current or historical land uses. Based on local knowledge, remove such parcels if site conditions effectively preclude further development within the planning horizon. Limited availability of information on the presence and extent of site contamination may hinder the ability of local governments to quantify its impact on future development potential. The *Contamination* field in the assessor data (value of "Y") can help identify contaminated properties.

### *Remove Environmentally Sensitive Lands*

Once vacant and redevelopable parcels have been identified, environmentally constrained land should be deducted from the land supply inventory. Environmentally sensitive areas may include the following:

- Wetlands
- Streams and buffers
- Shoreline buffers
- Slopes and geologic hazards
- Fish and wildlife habitat
- Aquifer recharge areas
- Frequently flooded areas

The precise definitions for each constraint will vary across jurisdictions, depending on provisions of local updated critical areas ordinances and other regulations, local environmental features, and recent development history.

A recommended GIS-based methodology for deducting critical areas is as follows:

1.) Select relevant GIS layers and features (e.g., wetlands, streams).
2.) Apply buffers to these features, based on local ordinances, where applicable. Features should be sorted by type, class, and/or location in order to apply appropriate buffer widths consistent with regulations.
3.) Merge buffered features into a combined "critical areas" layer.
4.) Overlay this layer with selected parcels (vacant, redevelopable, etc.) to delineate and quantify areas that intersect with land subject to development restrictions. Deduct constrained areas from the aggregate supply of developable land within each zoning/land use category.

Reliability of GIS environmental data for the capacity analysis depends on their completeness in representing the extent of features on the ground, as well as the positional accuracy of the mapped features in relation to parcels. GIS data may be deemed so incomplete or inaccurate as to render them unreliable as the sole indicator of the extent of critical areas that constrain the land supply. Insufficient data may still be useful for the Buildable Lands analysis, particularly if utilized as a starting point for enhancements from field surveys, aerial imagery classification, and other secondary approaches.

For the jurisdictions that lack adequate GIS data on environmental features, constrained land may be deducted through the use of assumed % discounts. Due to differences in degree of urbanization, and due to differences in land base, the actual percentage of land constrained within individual cities will vary considerably. Determination of appropriate discounts should rely on best available GIS, hard copy, and other information about the type and extent of critical areas at the zoning district level within jurisdictions.

### *Screen for Infrastructure Gaps*

A new requirement this cycle, jurisdictions must consider how lapses in infrastructure availability affect the amount of developable land supply. The buildable lands statue notes that this review shall include at least transportation, water, sewer, and stormwater infrastructure in the selection of developable land supply. Capital facilities and transportation plans will be key sources for this screen. King County is working with a consultant to recommend an approach for screening out infrastructure constrained, but otherwise developable, land supply. **Our recommended approach will follow in November.** This will be the last step in in identifying developable land supply, so please do not hesitate to begin the other steps first.

### *Summarize Data by Zone*

After you have crafted definitions, queried the data, and screened the results, **summarize parcel-based developable land area by zone in template Table 4: Land Supply**, as illustrated below. Transmit any GIS-based land supply data to King County as well.

| | | | | | | Select: | | | |
|---|---|---|---|---|---|---|---|---|---|
| Zone | Gross Acres | Critical Areas | Infrastructure Constrained Area | Vacant Area | Redevelopable Area | Residential | Non-Residential | Mixed-use | Other |

Field-level definitions and instructions for completing Table 4 follow below:

| | | |
|---|---|---|
| | Zone | Zone name/ID. Include all zones where people live and/or work |
| | Gross Acres | Total area of zone, summed from parcels (in acres) |
| | Critical Areas | Total area of critical or environmentally sensitive areas (in acres) |
| | Infrastructure Constrained Area | Total area of infrastructure constrained area (in acres) *more information on this field will be provided in November* |
| | Vacant Area | Total area of vacant land supply (acres) , summed from vacant parcel area |
| | Redevelopable Area | Total area of redevelopable land supply (acres), summed from redevelopable parcel area |
| Select: | Residential | Characterize the zone by its dominant use, mark with an "x" |
| | Non-Residential | |
| | Mixed-use | |
| | Other | |

## V. Wrapping Up and Next Steps

### *What to send to King County*

When your jurisdiction's planned density and developable land supply identification are complete, **please send the completed phase two table template and GIS-based representations of developable land supply to King County**, via the contact information at the beginning of this guidance. If necessary, include any other accompanying materials to document methods or assumptions. King County staff will review your data and follow up with any questions.

### *What's next?*

As laid out in the introduction, phase two data will be combined with achieved density data collected in phase one to calculate capacity in phase three of data collection. Phase three will begin in early 2020.

### *Stay in touch!*

If you need assistance or have questions, get in touch with King County staff anytime. We are available for direct assistance if your jurisdiction does not have GIS software or other resources. King County is planning workshops in November to help with phase two data collection; more information will follow soon.

Thank you for your attention and partnership in completing the 2020 Urban Growth Capacity Study!

# King County 2020 Urban Growth Capacity Study
## Phase 2 Data Collection - Additional Guidance on Infrastructure Gaps

### *Background*

This guidance supplements previous guidance from October 2019 on Phase 2 data reporting for the Urban Growth Capacity Study. The final step in completing the inventory of vacant and redevelopable land is a consideration of whether infrastructure availability will limit the developable land supply.

Formally identifying "infrastructure gaps" is a new requirement for the Urban Growth Capacity Study. To satisfy this requirement, King County is recommending the following process to identify any land unlikely to be serviced or achieve its planned density in the planning period, based on physical or ownership characteristics of the land, not because of service expense.

### *What Are Infrastructure Gaps?*

For the Urban Growth Capacity Study, an infrastructure gap exists for a property when one or more critical types of infrastructure– transportation, water, sewer, or stormwater– will not be available over the 20-year planning horizon, and will prevent land development. An infrastructure gap can prevent development in two ways:

- A total preemption of development potential e.g., no improvement is planned to deliver necessary urban services to a piece of land
- A reduction of development potential, e.g., an improvement cannot be provided to serve land at its planned density

### *Process for Determining Gaps*

The infrastructure evaluation process includes the following steps to identify parcels with long term infrastructure gaps significant enough to wholly or partially remove the land from the buildable lands supply:

1. Identify system capacity issues – are there gaps within the service area or capacity for water, sewer, or stormwater providers in your city?
2. Identify site-specific infrastructure gaps – are any parcels within a service area unlikely to be served because of their site characteristics?
3. Update developable land supply – remove parcels with infrastructure gaps from the land supply inventory.

Detailed instructions on how to complete these steps is provided in the next section.

### *Completing the Data Tables*

In the reporting template tables spreadsheet, the tab labeled "Table 2: Infrastructure Gaps" provides three tables to complete this assessment. If you determine no infrastructure gaps to exist in your city, this will be indicated by the results of Tables 2.1 and 2.3

### Step 1: Identify System Capacity Issues

1.1. Verify and update the data provided in the most recent Comprehensive Plan, documenting major changes in policy, service provision and other relevant details in Table 2.1.

1.2. List the providers serving your jurisdiction with essential infrastructure: water, sewer, and stormwater, in Table 2.1.

1.3. Collaborate with service providers, drawing from sewer and water district and comprehensive plans, to identify out-of-date planning information and any underserved portions of each city or the unincorporated urban area. Jurisdictions are advised to coordinate with public works staff to review, interpret and verify data. Note underserved areas or other gaps in the column "Service Deficiencies."

1.4. Document any future capital facilities investments planned to address these issues in Table 2.1. Determine if specific investments will resolve infrastructure gaps to "unlock" development potential and when it is expected to occur. Record these investments in column "Planned Investments."

1.5. Evaluate each system-wide capacity issue to determine if the issue is expected to stop or delay future development, or limit the types or densities of development that will be feasible. Record determinations in the column "Infrastructure Gap Present?" in Table 2.1

1.6. Preferably using GIS, overlay the service areas of providers with system capacity issues on the set of vacant and redevelopable parcels. Identify affected parcels in Table 2.2, noting the type of gap affecting development, whether it is a full or partial gap, and for partial gaps, the density restricted by the gap.

*Example Table 2.1:*

| Service Provider | Infrastructure Type | Service Deficiencies | Planned Investments | Infrastructure Gap Present? |
|---|---|---|---|---|
| *Westedge Water + Sewer District* | *Sewer* | *Zone 3 - lift station required* | *Zone 3 lift station in CIP, planned completion by 2030* | *No* |
| *Westedge Water + Sewer District* | *Water* | *None* | *None* | *No* |
| *Westedge Water + Sewer District* | *Water* | *Comprehensive Plan last updated 2011* | *No update planned* | *No, but land use assumptions need updating* |
| *West City* | *Comprehensive Plan* | *Capacity project required to serve West Ridge neighborhood currently on septic* | *None for West Ridge* | *Yes* |

*Example Table 2.2:*

| PIN | Area | Infrastructure Type | Partial or Full Gap | Density Constraint | Density Type |
|---|---|---|---|---|---|
| *1111111111* | *0.32* | *Sewer* | *Full* | | |
| *1111111114* | *1.15* | *Sewer* | *Part* | *2* | *DU/acre* |
| | | | | | |

## Step 2: Identify and Document Site-Specific Infrastructure Gaps

2.1. Review remaining vacant and redevelopable parcels to identify parcels with physical characteristics or locations that make them unlikely to be served with water, sewer, stormwater services, or roads, either completely, or to their planned density. Examples could include single parcels without road access, surrounded by other unrelated parcels lacking road access, or a parcel with site characteristics that would prevent sufficient sewer service for the planned highest and best use.

This review is most easily done through GIS. The previously supplied assessor data includes fields indicating whether a parcel currently has water, sewer, and transportation services. Suggested criteria for determining site-specific gaps for each utility are listed below. Jurisdictions may tailor these guidelines to meet local conditions. Please document any additional criteria used below Table 2.3:

- **Sewer:**
  - No pipe within 200'
  - Pipe within 200', but insufficient for highest and best use
  - Lift station required
- **Water:**
  - No pipe within 200'
  - Pipe adjacent, but insufficient for highest and best use
- **Stormwater:**
  - No adjacent public main
  - No available discharge point
  - No on-site infiltration capacity
- **Transportation:**
  - Inaccessible due to geographic constraints
  - No infrastructure to provide physical access to site
  - Infrastructure is aging, fails to meet adopted LOS or is otherwise out of compliance

2.2. Draw from code or adopted policy to determine if the issues are expected to stop or delay future development, or limit the types or densities of development feasible on vacant or redevelopable parcels. Review parcels with multiple gaps, regardless of severity, to consider if their combined impact will stop or delay development.

2.3. In Table 2.3, record identified site-specific infrastructure gaps, by documenting infrastructure constrained parcels in the developable land supply. List the parcel identification number, parcel area, type of infrastructure causing the gap, whether the gap fully removes the parcel from developable land supply or merely limits the density, and for partial gaps, the limit to the density, expressed in dwelling units per acre or floor area ratio. If no gaps exist, please write "NONE" in the table.

*Example Table 2.3:*

| PIN | Area | Infrastructure Type | Partial or Full Gap | Density Constraint | Density Type | Note |
|---|---|---|---|---|---|---|
| *1111113462* | *0.48* | *Transportation* | *Full* | *(# if part)* | *(FAR or DU/ac)* | *surrounded by parcels without access* |
| | | | | | | |

## Step 3: Update Developable Land Supply

3.1. Drawing from Tables 2.2 and 2.3, in Table 4 (Land Supply), update the field "Infrastructure Constrained Area" with the area of developable land supply affected by FULL infrastructure gaps. Subtract this area and the critical areas from the gross area for the net buildable redevelopable or vacant land supply.

3.2. For partially constrained parcels, in Table 4 create a new line for each affected zone, noting the infrastructure constraint in the "Zone" field (e.g., for zone R-6, create a row for R-6-constrained, or similar). Include the area of the affected parcels in the "Infrastructure Constrained Area" field.

3.3. Summarize vacant and redevelopable land supply by zone.

# Appendix C: Phase 3 Guidance - Initial Capacity

2021 Urban Growth Capacity Report – DRAFT Phase 3 Reporting Guidance
June 2020

## Introduction

The Urban Growth Capacity Study, also known as "buildable lands," is a collaboration between cities and King County to analyze recent land use development trends, and to compare those trends to comprehensive plans and growth targets. The study will provide meaningful information to cities and King County on development and capacity for updating growth targets and comprehensive plans. King County coordinates the development of the report, and each city provides a standardized set of development data for their jurisdiction.

In Phase 1 of data collection, conducted in 2019, cities collected data on recent development 2012-2018, in an effort to determine the zone-based achieved development densities. In Phase 2 of data collection, conducted in late 2019 and early 2020, cities collected data to identify the supply of available land over the next 20 years as well as information on planned densities for each zone. Phase 3 of the data collection process will build off the work of previous phases to determine assumed density and calculate an initial capacity for each zone. Phase 3 will also include review and reporting of housing and employment growth relative to cities' growth targets, as well as an opportunity to review achieved densities relative to planned densities. This document will guide planners and analysts through this process.

Cities will submit data for Phase 3 in a separate reporting template table accompanying this document. Due to circumstances and limited capacity caused by the COVID-19 Pandemic, King County is allocating resources and technical support for cities facing challenges meeting this data request. All previously submitted data relevant to Phase 3 has been entered into collection tables for each city (in tables 1, 2, and 4), and gaps in data collection have been noted or left as blank, but reviewing the completeness for the list of zones within your city, supplied densities, and land supply information is a great place to start. Any questions or requests for support can be forwarded to the Rebeccah Maskin rmaskin@kingcounty.gov or Ben Larson blarson@kingcounty.gov.

Reporting for Phase 3 data collection is due August 10th.

## About Phase 3 Reporting

Phase 3 data reporting has three key components:

1. Calculating an initial capacity for each zone in your city
2. Reviewing and reporting on housing and employment growth relative to adopted growth targets
3. Reviewing and reporting on achieved densities relative to planned densities

*Why "Initial" Capacity?*

Phase 3 will work towards calculating capacity, but two assumptions used within the process for calculating capacity are currently being updated to provide more up-to-date information and meet state requirements. In the autumn 2020, jurisdictions will incorporate these assumptions and calculate final capacity for the Urban Growth Capacity Report. The two assumptions are:

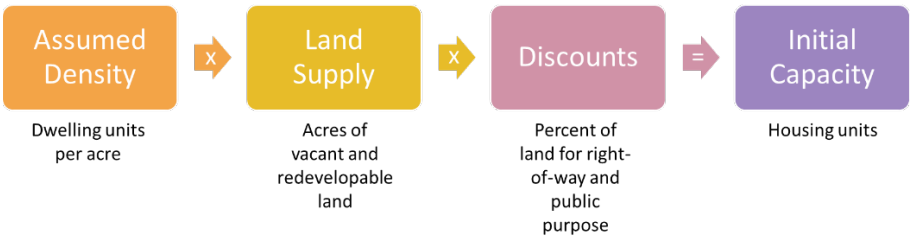
- Market Factor. An assumption that accounts for the amount of land kept out of development because of landowner preference not to develop.
- Square feet per Job Assumptions. These assumptions are used to convert non-residential capacity expressed in square feet to employees.

*How Initial Capacity is calculated*

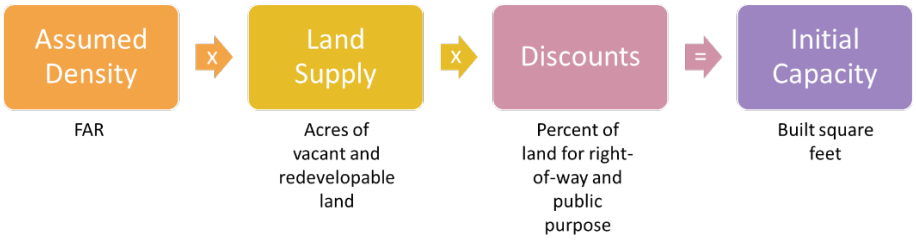
Generally, developable capacity is calculated by zone, and is the product of a zone's assumed density and the area of land supply, minus a percentage accounting for streets, sidewalks, and public purpose land. Achieved densities calculated in Phase 1 of data collection form the basis for the assumed densities, and the land supply was reported by zone in Phase 2. Jurisdictions will select discounts for right-of-way and public purpose lands, informed by recent

development trends, to reduce the land supply for non-buildable, necessary infrastructure. The following graphics illustrate the how capacity is calculated.

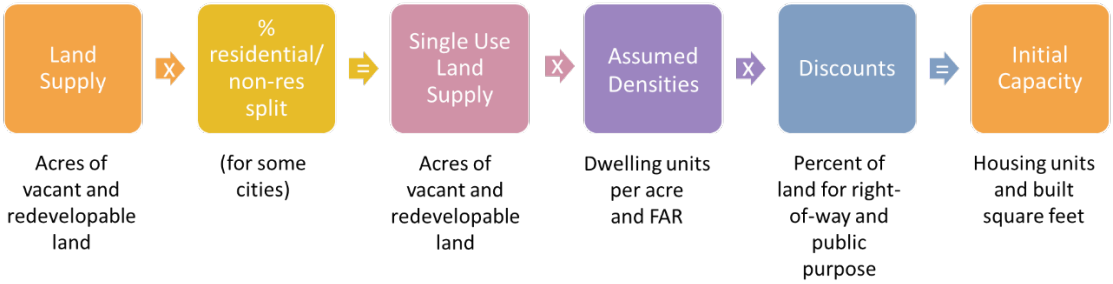
Calculating Residential Capacity




Calculating Non-Residential Capacity



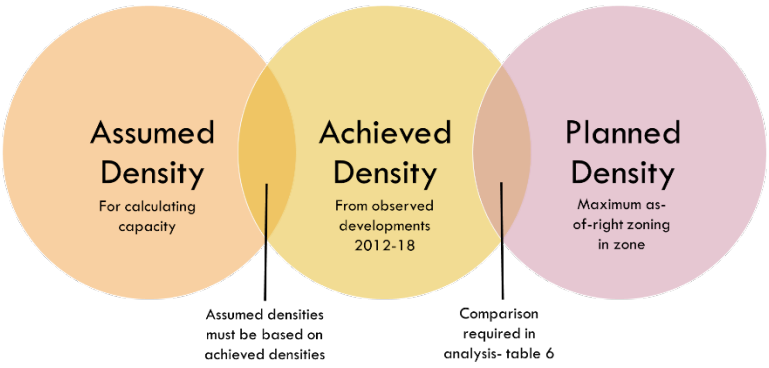

Calculating Mixed-use Capacity




*Reviewing Progress toward Targets and Densities*

Reviewing and reporting on progress toward growth targets and planned densities provides context on how each jurisdiction is meeting its planning goals. Should a city or the unincorporated urban area of the county be found to not be achieving its growth target or planned densities, reasonable measures may need to be adopted in the 2024 comprehensive plan. Reasonable measures are policy or planning strategies selected by jurisdictions to bring growth or development into alignment with planning goals. This is a new requirement for the buildable lands program, and more information is provided in the guidance below. In Phase 3, we are asking cities to compare adopted targets and growth, and achieved and planned densities, and report on policy, code, or other planning circumstances that may explain or otherwise account for the difference. For reference, the graphic below illustrates the difference between the three types of densities that are referenced in developing the Urban Growth Capacity Report.

Types of Density Reported in the Urban Growth Capacity Report




## How to Complete Phase 3 Reporting

There are six tables in the template spreadsheet in the reporting packet that must be filled out to complete Phase 3 reporting. Additional materials in the reporting packet email and reporting template spreadsheet will assist your completion of Phase 3 reporting including:

- Past right of way and public purpose assumptions to discount undevelopable land
- Recommendations on adjusting discounts based on recent development trends
- Your jurisdiction's data provided in Phases 1 and 2

The next sections of this guidance will explain how to fill out the template spreadsheet tables.

### *Table 1: Assumed Densities*

Assumed densities are an essential component to calculating capacity. They are reported for each zone where development can occur. Assumed densities, except in limited circumstances, must be based upon the achieved densities observed in the 2012-2018 evaluation period reported in Phase 1 of Urban Growth Capacity data collection. This is specifically called out in RCW 36.70A.215(3)a, e.

Deviation from achieved density is only permitted for zones in the following circumstances:

- **Insufficient observed development in the evaluation period**. Some zones may have experienced limited or no development to draw reasonable conclusions for anticipated development densities, either in the types of development allowed in a mixed use zone, or in the quantity of development.
- **Changes in regulations**. Densities achieved in development permitted during the 5-year review period may reflect zoning and development regulations that have since changed. Where regulations have changed to effectively increase or decrease achievable net densities, assumed future densities should reflect the impact of those regulatory changes, and the specific changes should be documented.
- **Trends over time**. A trend of increasing dwelling units per acre or FAR over time could justify an assumed future density higher than indicated in the zonal average reported as achieved density in Phase 1. Annual reporting in Phase 1 data would indicate this trend.
- **Infrastructure gaps.** "Partial infrastructure gaps," where infrastructure imitations affected portions of zones from achieving planned densities were identified in Phase 2 data reporting.

In such cases, jurisdictions may look to the planned density to inform the assumed density. Documentation of the specific development circumstances that demand deviation from the achieved density, and the rationale for the selected assumed density are required.

Reporting for this section is completed in table 1, as described below. Rows in table 1 will be populated with jurisdictional data provided in Phases 1 and 2. Depending on the completeness of data provided, achieved or planned densities for some zones may still need to be provided. Please review data provided for completeness vis-à-vis the zones in your jurisdiction.

When filling out table 1 for mixed use zones, create an individual row for each use.

Carrying over from Phase 2 reporting, if a portion of a zone is partly constrained by an infrastructure gap, create a separate row for those subareas, and use the constrained density in the assumed density field, noting the infrastructure gap in the document differences field.

*Table 1: Assumed Densities*

| Zone | Land Use Type | Achieved Density | Planned Density | Assumed Density | Document differences between Assumed and Achieved densities, and rationale for selected density |
|---|---|---|---|---|---|
| | | | | | |

*Table 1 Fields and Reporting Instructions*

| Field Name | Definition and Reporting Instructions |
|---|---|
| Zone | Gathered from Phase 2 reporting. Each zone where development may occur must have values for all three densities below. For zones that allow multiple land uses list that zone once for each use. |
| Land Use Type | Residential, non-residential, mixed use, or Other (e.g. public lands, park zones, etc. that are occasionally recorded). |
| Achieved Density (both DU/acre and FAR) | From Phase 1 reporting. The achieved density the observed density of development occurring in a zone during the evaluation period 2012-2018. It is expressed in dwelling units per acre (residential) or FAR (non-residential). If no development was observed in a given zone, mark with zero and document in the "Documenting Differences" field. |
| Planned Density (both DU/acre and FAR) | From Phase 2 reporting. The planned density is the as-of-right density granted by code for each zone, that is the maximum allowed density without any bonus or incentive density. |
| Assumed Density (both DU/acre and FAR) | The density used to calculate capacity in this zone. In most cases this will be the same as the achieved density. Exceptions to this rule are described in the above section. |
| Documenting Differences | Use this field to report on the circumstances that warrant deviation from using the achieved density as the assumed density to calculate capacity. |

*Table 2: Mixed Use Zone Use Splits*

Mixed use zones are defined as zones with capacity for both residential and non-residential development. In some cities, mixed use zones require the achieved use splits observed in Phase 1 to apportion area to residential and non-residential uses to calculate capacity, but all cities should report on differences between achieved and planned mixed use development. Some mixed use zones did not see mixed use development in the evaluation period. In these instances, jurisdictions can draw from additional sources:

- Observed splits in zones in comparable zones in or outside of your jurisdiction
- Expressed vision for these areas in comprehensive and neighborhood plan policies, or development regulations
- Local knowledge of market conditions, demand for space, projects in the development pipeline, and developer interest
- Existing development similar to that envisioned for a zone

Be sure to document which sources of information were used to determine assumed mixed use splits. Reporting for this section is completed in table 2, as described below.

Table 2: Mixed Use Zone Use Splits

| Zone | Achieved % of Residential Development | Achieved % of Non-residential Development | Assumed % of Residential Development | Assumed % of Non-residential Development | Document differences between Assumed and Achieved Residential/Non-residential % |
|---|---|---|---|---|---|
| | | | | | |

*Table 2 Fields and Reporting Instructions*

| Field Name | Definition and Reporting Instructions |
|---|---|
| Zone | Gathered from Phase 2 reporting. |
| Achieved % of Residential Development | From Phase 1 reporting; zones without observed mixed use development will be zero. |
| Achieved % of Non-residential Development | From Phase 1 reporting; zones without observed mixed use development will be zero. |
| Assumed % of Residential Development | The share of residential development that will be used to apportion land to residential use. Assumption is to be based off of achieved splits, unless circumstances described above apply. |
| Assumed % of Non-residential Development | The share of non-residential development that will be used to apportion land to non-residential use. Assumption is to be based off of achieved splits, unless circumstances described above apply. |
| Documenting Differences | Use this field to report on the circumstances that warrant deviation from using the achieved development splits as the assumed splits to calculate capacity. In cases where no development was observed, cite the sources used to estimate assumed use splits. |

### *Table 3: Discounts*

To more accurately estimate the actual developable capacity, the area of vacant and redevelopable land supply must be reduced or "discounted" to account for land that gets utilized for rights-of-way and other public purpose uses where people do not live or work. Public purpose uses are generally stormwater facilities, parks, or other open space. These amounts vary by type and density of development.

The starting place for approximating these discounts is the observed development data used to calculate achieved densities in Phase 1. Past buildable lands reports provide additional reference points, built from the development observed during those evaluation periods. As development becomes denser and occurs as infill, these discount rates reduce, as right-of-way and public purpose uses are already built into the urban fabric.

To support jurisdictional selection of discounts, King County has performed analysis of developments constructed 2012-2018 that informed Phase 1 reporting. Discounts used in the 2007 Buildable Lands Report are also provided to inform the discount selection for the 2021 report. There may be reasons to deviate from the observed or past discounts, including:

- Increasingly dense or infill development experienced or anticipated in the future, could lend to reduced discounts, as essential infrastructure is already present.
- Changes in development regulations could affect discounts in either direction. Development regulations requiring additional set asides for environmental protection, for example could suggest increased discounts, while upzones or increases in land use intensity would suggest decreased discounts.

While zone-specific discounts are not recommended, additional detail may be provided. Land use or density patterns in some cities may justify a single discount being applied across residential land supply, or for multifamily and mixed uses.

Table 3: Discounts

| | **Right of Way** | **Public Purpose** |
|---|---|---|
| Parcel Analysis SF Discount | % | % |
| Parcel Analysis MF/MU Discount | | |
| BLR 2007 SF Discount | | |
| BLR 2007 MF Discount | | |
| BLR 2007 MU/Comm/Ind Discount | | |
| **SF Discount Selected** | | |
| **MF Discount Selected** | | |
| **MU/Comm/Ind Discount Selected** | | |

*Table 3 Fields and Reporting Instructions*

| Field Name | Definition and Reporting Instructions |
|---|---|
| Parcel Analysis SF Discount | Drawing from the comparison of 2012 and 2018 parcels that supplied data for Phase 1 reporting, this is the calculated portion of single family parcels developed during that period that went to right-of-way or public purpose uses. |
| Parcel Analysis MF/MU Discount | Drawing from the comparison of 2012 and 2018 parcels that supplied data for Phase 1 reporting, this is the calculated portion of multifamily and mixed use parcels developed during that period that went to right-of-way or public purpose uses. Values are not jurisdiction specific, and draw from a sampling of development |
| BLR 2007 SF Discount | This is the discount used for single family land supply in the 2007 Buildable Lands Report. Note that formatting may differ based on how discounts were applied in 2007 report. |
| BLR 2007 MF Discount | This is the discount used for multifamily land supply in the 2007 Buildable Lands Report. Note that formatting may differ based on how discounts were applied in 2007 report. |
| BLR 2007 MU/Comm/Ind Discount | This is the discount used for mixed use, commercial, and industrial land supply in the 2007 Buildable Lands Report. Note that formatting may differ based on how discounts were applied in 2007 report. |
| SF Discount Selected | Fill in your jurisdiction's selected discount for single family land supply here. Selecting a single discount for multiple land uses is also possible depending on your city's circumstance. |
| MF Discount Selected | Fill in your jurisdiction's selected discount for multifamily land supply here. Selecting a single discount for multiple land uses is also possible depending on your city's circumstance. |
| MU/Comm/Ind Discount Selected | Fill in your jurisdiction's selected discount for non-residential and/or mixed-use land supply here. Selecting a single discount for multiple land uses is also possible depending on your city's circumstance. |

### *Table 4: Initial Capacity*

In the template spreadsheets, the two tables on the tab titled "Table 4" calculate residential and non-residential capacity. The tables are separated for clarity, but are filled out in a similar way, moving from left to right to calculate initial capacity.

In each table, you'll create separate rows for each zone, and for vacant and redevelopable lands within each zone. Mixed use zones should have rows in both residential and non-residential tables. Be mindful of capacity affected by partial infrastructure gaps identified in Phase 2 reporting. These areas should also have their own rows to reflect the constrained densities of the infrastructure gaps.

*About Calculating Mixed Use Capacity*

In Phase 1 data collection, achieved densities were separately calculated for the residential and non-residential components of mixed use projects. These achieved densities were generally calculated from the number of residential units or commercial/office square footage over the entire parcel area. Calculating density in this manner factors in a split between residential and non-residential uses into the achieved density, making a separate apportionment of mixed use zoned land before the assumed density is applied unnecessary.

A handful of cities calculated density in a different, but equivalent, way— either expressing density only in FAR, or calculating the achieved densities for each use over a portion of the parcel relegated to individual land uses. Cities that calculated mixed use achieved density in one of these alternative ways will need to use the assumed mixed use shares recorded in Table 2 to apportion mixed use land supply to residential and non-residential use in each zone before applying the achieved densities, and document this approach in notes on table 4.

*Table 4: Initial Capacity (Residential)*

| Zone | Mixed Use Zone | Land Use | Vacant/ Redevelopable | Assumed Density | Land Supply Area | Right of Way % | Public Purpose % | Buildable Area | Initial Residential Capacity | Existing Units on Redevelopable Parcels |
|---|---|---|---|---|---|---|---|---|---|---|
| Phase 2/ table 1 | Y/N | SF/MF/MU | Select | from table 1 | Phase 2 | from table 3 | from table 3 | Acres | Housing units | Housing units |

*Table 4: Initial Capacity (Non-residential)*

| Zone | Mixed Use Zone | Land Use | Vacant/ Redevelopable | Assumed Density | Land Supply Area | Right of Way % | Public Purpose % | Buildable Area | Initial Non-residential Capacity | Existing construction on Redevelopable Parcels |
|---|---|---|---|---|---|---|---|---|---|---|
| Phase 2/ table 1 | Y/N | Com/Ind/MU | Select | from table 1 | Phase 2 | from table 3 | from table 3 | Square Feet | Square feet | Square feet |

*Table 4 Fields and Reporting Instructions (both sub-tables combined)*

| Field Name | Definition and Reporting Instructions |
|---|---|
| Zone | Gathered from Phase 2 reporting, copied from Phase 3, table 1. |
| Mixed Use Zone | Yes or no- indicate whether this is a mixed use zone. Mixed use zones should have a residential and a non-residential row. |
| Land Use | Residential or Non-residential. |
| Vacant/Redevelopable | Indicate whether this is redevelopable or vacant land supply. |
| Assumed Density | Copied from table 1. |
| Land Supply Area | Gathered from Phase 2 reporting, table 4. |
| Right of Way % | Copied from table 3. |
| Public Purpose % | Copied from table 3. |
| Buildable Area | Developable land area for zone, from which capacity is calculated. Calculated field: Multiplies the single use land supply by 1-right of way % and 1-public purpose % discount fields. Residential land is expressed in acres (to be multiplied by DU/acre), non-residential land is expressed in square feet (to be multiplied by assumed FAR). |

| Field Name | Definition and Reporting Instructions |
|---|---|
| Initial (Non-)Residential Capacity | Initial capacity for zone. Multiply the buildable area by the assumed density in DU/acre. |
| Existing construction on Redevelopable Parcels | Compile the existing development in housing units or built square feet on land identified as redevelopable. |

### *Table 5: Achieving Growth Targets*

The review and evaluation program of the Growth Management Act requires that the county and its cities evaluate how they are achieving urban densities by comparing growth and targets. Further analysis is required where county or city growth targets are not being achieved. This concept has long been a part of the review and evaluation program, but amendments to the statute in 2017 strengthened analysis and reporting requirements, making non-achievement of growth targets a potential trigger for reasonable measures in the subsequent periodic comprehensive plan update.

To achieve this aim, King County is comparing estimated housing unit and employment growth 2006-2018 to growth targets adopted in the 2012 Countywide Planning Policies, extended to 2035. The extended growth targets were first published in a 2013 memo to help develop 2015 comprehensive plans. The extended targets have been adjusted to account for major annexations that have occurred since 2013. The memo and adjusted 2006-2035 targets are included in this Phase 3 data reporting packet.

For the recent estimates used to compare to the growth targets, 2006-2018 housing unit growth is derived from block-level OFM Small Area Population Estimates, using consistent geographic boundaries for cities in 2019. 2006-2018 employment estimates derive from the PSRC Covered Employment estimates. Employment estimates reflect total employment, less construction/resource sector employment, to mirror the targets for this period.

For Phase 3 data reporting, King County is requesting cities review the estimates in comparison to growth targets. This data will support the assessment of whether targets are being achieved. This data is presented in Table 6 of the Phase 3 reporting template. In addition to reviewing this data, jurisdictions are requested to consider the observed growth over the 2006-2018 evaluation period relative to the target, and report mitigating circumstances that have landed to significant differences between growth and the target. Such circumstances may include (but are not limited to):

- Development moratoria
- Timing or financing of infrastructure investments
- Preexisting developer agreements or major planned developments
- Development occurring well below planned densities
- National economic trends or factors outside of local land use control

Reporting for this section is completed in Table 5a and 5b, and described below. Data for all cities is also contained in a Tableau dashboard available here: https://public.tableau.com/profile/arrmask#!/vizhome/CompareTargets2006-35_all

*Table 5a: Housing*

| 2006-2035 Extended Housing Target | 2006-2018 Target Elapsed | % of Target Period Elapsed | 2006-2018 Housing Growth | % of Target Achieved | Discussion |
|---|---|---|---|---|---|
| | | | | | |

*Table 5b: Jobs*

| 2006-2035 Extended Job Target | 2006-2018 Target Elapsed | % of Target Period Elapsed | 2006-2018 Job Growth | % of Target Achieved | Discussion |
|---|---|---|---|---|---|
| | | | | | |

*Table 5 Fields and Reporting Instructions*

| Field Name | Definition and Reporting Instructions |
|---|---|
| 2006-2035 Extended Housing/Job Target | This field is supplied by King County, and reflects the adopted 2006-2031 target, extended to 2035 per the memo provided in the Phase 3 reporting packet. Jobs data reflects total employment minus construction/resource sector employment. City geographic boundaries reflect major annexations current through 2019. |
| 2006-2018 Target Elapsed | This field is supplied by King County. It is a time-based estimate of the amount of target that has elapsed from 2006-2018. 41% of the 2006-2035 period has elapsed, so it is equal to 41% of the housing or jobs target. Review this number and compare it to the 2006-2018 growth estimate. |
| % of Target Period Elapsed | This field is supplied by King County. It is a time-based estimate of the amount of target that has elapsed from 2006-2018. 41% of the 2006-2035 period has elapsed, so it is equal to 41% of the housing or jobs target. |
| 2006-2018 Housing/Job Growth | This field is supplied by King County. Housing unit data is sourced from OFM Small Area Estimates; job data is sourced from PSRC's employment estimates, minus construction/resource sector employment. City geographic boundaries reflect major annexations current through 2019. Review this estimate and compare to the 2006-2018 target elapsed estimate. |
| % of Target Achieved | This field is supplied by King County, calculated from the housing or job growth estimates divided by the extended target. |
| Discussion | Use this field for reporting specific events or conditions during the 2006-2018 period that could allow for a slower or quicker rate of target absorption. Examples are described in the preceding section. |

### *Table 6: Achieving Planned Densities*

Reporting on densities has always been a part of the review and evaluation program, but the review plays a more prominent role in this iteration of the Urban Growth Capacity Report. Like reporting on growth targets, amendments to the buildable lands statute in 2017 strengthened analysis and reporting requirements, making non-achievement of growth of planned densities a potential trigger for reasonable measures in the subsequent periodic comprehensive plan update.

Phase 3 data reporting will build towards this requirement by requesting your jurisdiction's reflection on differences in the densities achieved during the 2012-2018 evaluation period, and those you are planning for. Achieved densities derive from Phase 1 data reporting. Planned densities were requested in Phase 2 data reporting. Determination of "achieving" planned densities will be made later in 2020 according to countywide standards. Further analysis will be required where cities are determined to not be achieving planned densities.

For this phase of data reporting, King County is requesting jurisdictions compare achieved and planned densities for each zone, and evaluate potential reasons why densities may not have been achieved by development during the evaluation period. Such circumstances may include (but are not limited to):

- Rezones that occurred during the evaluation period
- Significant development regulation changes
- Infrastructure or level of service limitations
- Lack of capacity for new development
- Limited quantity of development to draw a comparison
- National economic conditions or development trends outside of local control

- Development vested under preexisting development regulations
- Development moratoria in specific zones or neighborhoods

Reporting for this section is completed in Table 6, and described below.

*Table 6: Density Reporting*

| Zone | Land Use Type | Planned Density | Achieved Density | Difference | Discussion |
|---|---|---|---|---|---|
| | | | | | |

*Table 6 Fields and Reporting Instructions*

| Field Name | Definition and Reporting Instructions |
|---|---|
| Zone | Supplied by King County- please review for completeness. Cities with complex zoning codes may aggregate zones to a more generalized zone category that makes sense for monitoring. |
| Land Use Type | Indicate the type of use, residential, non-residential, or mixed use. For mixed use zones, include two lines for both the residential and non-residential planned and achieved densities. If your jurisdiction only uses FAR densities, you may report a single FAR value instead of indicating non-residential and residential densities. |
| Planned Density | From Phase 2 reporting |
| Achieved Density | From Phase 1 reporting |
| Difference | Calculated as a percentage: Achieved Density / Planned Density |
| Discussion | Use this field for reporting specific events or conditions during the 2006-2018 period that could allow for a slower or quicker rate of target absorption. Examples are described in the preceding section. |

## Wrapping up and Next Steps

Thank you for taking the time to read this guidance and complete Phase 3 reporting. Your partnership is essential to completing the Urban Growth Capacity Report. When your tables have been completed, please email them back to King County, to both rmaskin@kingcounty.gov and blarson@kingcounty.gov. Submissions are due July 13th, 2020.

King County's goal is to have all Phase 1 and 2 data completely submitted in early August 2020. This will facilitate countywide estimates of initial capacity in early September 2020. After Phase 3 is complete, we will follow up with information on calculating final capacity, and determinations on target and density achievement.

If you have questions or need help at any time, do not hesitate to contact Ben and Rebeccah, via the emails above or at 205-263-9590 (Ben) and 206-263-0380 (Rebeccah).

# Appendix D: Phase 4 Guidance - Final Capacity

## Introduction

The Urban Growth Capacity Study, also known as "buildable lands," is a collaboration between cities and King County to analyze recent land use development trends, and to compare those trends to comprehensive plans and growth targets. The study provides meaningful information to cities and King County on development and capacity for updating growth targets and comprehensive plans. King County coordinates the development of the report, and each city provides a standardized set of development data for their jurisdiction.

In February 2021, King County cities will report on the final assumptions necessary to calculate final capacity for this project. The previous three phases of reporting have cumulatively built upon each other towards the goal of calculating final capacity for each jurisdiction, as shown in Figure 1 below.

*FIGURE 1: FLOW OF URBAN GROWTH CAPACITY REPORTING PHASES*

Phase 4 of data collection will again build off work from previous phases of data collection to calculate residential and non-residential capacity. Final capacity will be compared to the remaining 2006-2035 growth target to determine whether sufficient capacity exists for targeted growth.

**To calculate final capacity, cities will select two assumptions for each zone: *Market Factor* and *Employment Density* (Employment Density applies to mixed use and non-residential zones only). This guidance and set of reporting tables aim to provide the information necessary for each city to select appropriate assumptions for each zone.**

Cities will submit data for Phase 4 in a separate reporting table template accompanying this document. King County staff are pursuing an accelerated timeline for Phase 4 data collection to complete capacity data for a draft Urban Growth Capacity Report in March 2021. **Phase 4 data is requested by March 5, 2021**. Resources and direct technical support are available to help meeting this data request. All previously submitted data relevant to Phase 4 has been entered into collection tables for each city and gaps in data collection have been noted or highlighted. Capacity calculations hare been pre-programed to the extent possible to facilitate efficient reporting.

Additionally, staff are encouraged to schedule appointments with Ben Larson to facilitate data collection. Staff are invited to book time via Calendy, an online scheduling website linked to Microsoft Outlook. You can schedule an appointment by clicking the following link: https://calendly.com/kingcounty_ugc/phase-iv. No account is necessary

Any questions or requests for support can be sent to Rebeccah Maskin rmaskin@kingcounty.gov or Ben Larson blarson@kingcounty.gov. As always, we greatly appreciate your assistance and cooperation with this request. Do not hesitate to reach out to let us know how we can facilitate your involvement in completing Urban Growth Capacity reporting.

## Background on Phase 4 Data Assumptions

Phase 4 data reporting will build directly upon the data your jurisdiction reported in Phase 3 (initial capacity). Cities will select **Market Factor** assumptions to discount the identified land supply for each developable zone. Then, for zones with non-residential development, cities will select **Employment Densities**, expressed as square feet per job ratios, to convert built space capacity into employment capacity. Through allocated buildable lands grant funding from the Department of Commerce, King County has performed an updated analysis to support recommended assumptions, to comport with new statute requirements and recent development trends. Documents detailing the new analysis are included in the Phase 4 reporting package.

### *Market Factor*

The Market Factor, also known as the Market Supply Factor, is a final adjustment to the developable land supply that follows other deductions that account for critical areas, infrastructure gaps, right-of-way, and future public facilities. It accounts for the percentage of buildable land that, due to market constraints, will not be developed during the 20-year planning period. Traditionally, it has been used as a proxy to account for landowner preference to not develop, or inability to develop property over the planning period. Market Factor will be applied to both residential and non-residential zones to determine final housing and employment capacity for each city.

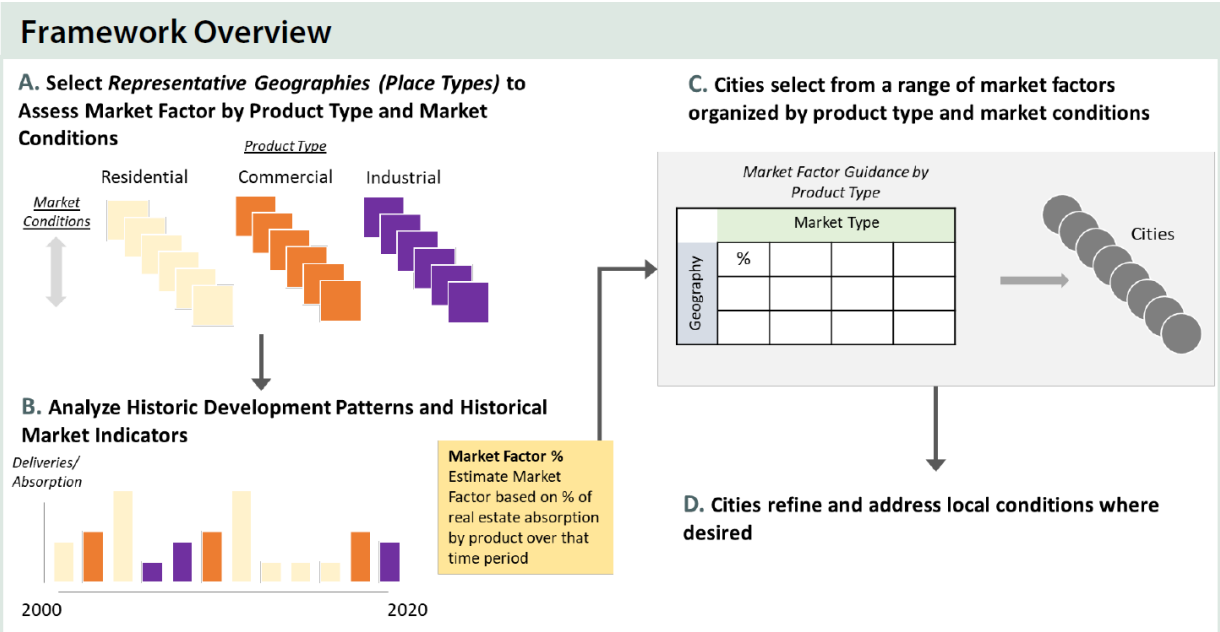
In general, land uses and zones where a *high* level of development or land conversion are expected over the planning period should assume a *low* market factor. Conversely, land uses and zones where development may be more difficult or slower to develop should assume a *high* market factor.

Through an updated analysis[1], recommended market factor ranges have been developed for residential and non-residential zones, varying by Regional Geography and relative market strength (market factor alignment). The analysis behind these recommended ranges compares historical development and land supply identified in the 2021 UGC study. Grouping cities by VISION 2050 Regional Geography, consultants analyzed the amount of development by "product type" (e.g., multifamily/mixed-use residential or industrial development) compared to the amount of capacity in zones linked to that product type, resulting in a distribution of rate of development for cities within a Regional Geography category.

Based on this distribution, cities were grouped into low, medium, and high market factor recommendation, with an associated range of market factors calculated from the relative amount of land left undeveloped in the product type classification. This process is illustrated in Figure 2, and detailed in pages 17-27 of the Market Factor Guidance document included in the reporting package

[1] *King County Urban Growth Capacity Market Factor Guidance* developed by Heartland, LLC and BERK Consulting, 2021. Excerpts from this guidance, including a step by step guide to selecting market factor are included in the reporting package. For the full draft guidance (includes appendices), please contact King County staff.

*FIGURE 2: MARKET FACTOR RANGES DEVELOPMENT PROCESS OVERVIEW*




The recommended ranges for product types by Regional Geography and market alignment are shown in Figure 3.

*FIGURE 3: RECOMMENDED MARKET FACTOR RANGES*

| City Typology | Residential | | Non-Residential | |
|---|---|---|---|---|
| Market Factor Alignment | Multifamily/ Mixed-Res | Single Family | Commercial (Office/Retail/Mix) | Industrial |
| Metropolitan Cities | | | | |
| Low | 5%-10% | 1%-14% | 1%-10% | 1%-15% |
| Core Cities | | | | |
| Low | 5%-10% | 1%-14% | 1%-10% | 1%-15% |
| Medium | 11%-20% | 15%-20% | 11%-20% | 16%-35% |
| High | 21%-35% | 21%-30% | 21%-50% | 36%-50% |
| High-Capacity Transit Communities | | | | |
| Low | 5%-10% | 1%-9% | 1%-14% | 1%-19% |
| Medium | 11%-15% | 10%-20% | 15%-25% | 20%-30% |
| High | 16%-30% | 21%-35% | 26%-50% | 31%-50% |
| Cities and Towns | | | | |
| Low | 10%-24% | 1%-10% | 1%-10% | 1%-15% |
| Medium | 25%-35% | 11%-40% | 11%-20% | 16%-35% |
| High | 36%-50% | 41%-50% | 21%-50% | 36%-50% |

## *Selecting Market Factor for Your City*

The first task of Phase 4 reporting will be to select the appropriate market factors for your city. For each zone, staff completing reporting will identify a market factor within the recommended ranges and update the reporting table. If the ideal market factor for a zone is determined to be outside of the recommended range, the specific rationale for selecting this market factor must be documented in the reporting table. Cities may vary their selected market factors by the relative complexity of zoning and available land within their jurisdiction. For smaller cities or less complex zoning, a single market factor by land use type may be appropriate, whereas larger cities or more complex development situations may require a more refined identification of appropriate market factors.

The following guidance describes the factors to weigh when selecting a value within the recommended ranges. More detail is included on pages 25-27 of the included Market Factor Guidance document, with the key factors to consider outlined here.

### *Redevelopable vs. Vacant Land*

Cities are welcome to attune their market factors separately for vacant and redevelopable land stock. Be sure to consider how redevelopable lands were identified in calculating the land supply in phase 2 of data reporting. If in identifying the redevelopable land supply, a higher existing-to-planned density ratio or improvement-to-land value ratio was assumed for redevelopable lands, consider whether differentiating between redevelopable and vacant market factors is further required, as that definition already assumes a differentiation between these lands based on market forces.

Traditionally, redevelopable lands have assumed higher market factors than vacant lands to account for the relative ease of converting vacant land to development. As redevelopment takes more of the share of development, it could suggest the remaining vacant land could have significant development challenges that reduce this advantage.

### *Market Trends*

If trends indicate growth in demand for a given product, consider a downward adjustment on market factor to reflect this demand. Alternatively, if the market data for a given product indicates more difficult market conditions, consider selection of a higher market factor within the recommended range.

### *Upzoned Existing Single-Family Areas*

Market factor may be adjusted to account for relative uncertainty regarding how existing single-family zones that have been rezoned for greater intensity may redevelop. The age and value of the housing stock, presence of transit infrastructure, and recent sales or permitting activity can inform how to refine the appropriate market factor for these areas.

### *Restrictive Covenants*

Some areas that have been rezoned or upzoned may still be subject to restrictive covenants that run with the land and limit how development may occur. This is most likely to exist in existing single-family neighborhoods but may also pose a challenge in business parks and other similar commercial districts. A higher market factor can account for this situation.

#### *Fragmented Ownership and Parcel Size*

Where capacity for a given product type is largely spread across fragmented or non-contiguous parcels and parcel sizes are generally smaller in size, a higher market factor may be considered to account for difficulties in parcel assemblage for future redevelopment.

#### *Access to Transit*

Planned transit infrastructure can greatly improve development feasibility and owner willingness to sell/redevelop land. Market factor assumptions can be tuned to reflect where such improvements exist or are planned in the future.

#### *Infrastructure Cost*

In phase 2 of data reporting, we examined the presence or availability of infrastructure in the identification of land supply. Market factor can build on this work, including selecting a higher factor to account for the cost or likeliness of significant infrastructure construction to support planned development.

### *Employment Densities*

Selecting a square feet per job assumption, or employment density, per zone or land use is the last step of calculating non-residential capacity, converting built space capacity to jobs. Cities may vary their selected employment densities by the relative complexity of zoning and available land, or the sectors of employment that are likely to exist within their jurisdiction. Smaller cities or those with less complex zoning may consider a single value or values depending on the land use. Our most basic recommendation is differentiating between commercial and industrial jobs, because of the wide variance in employment density between these types.

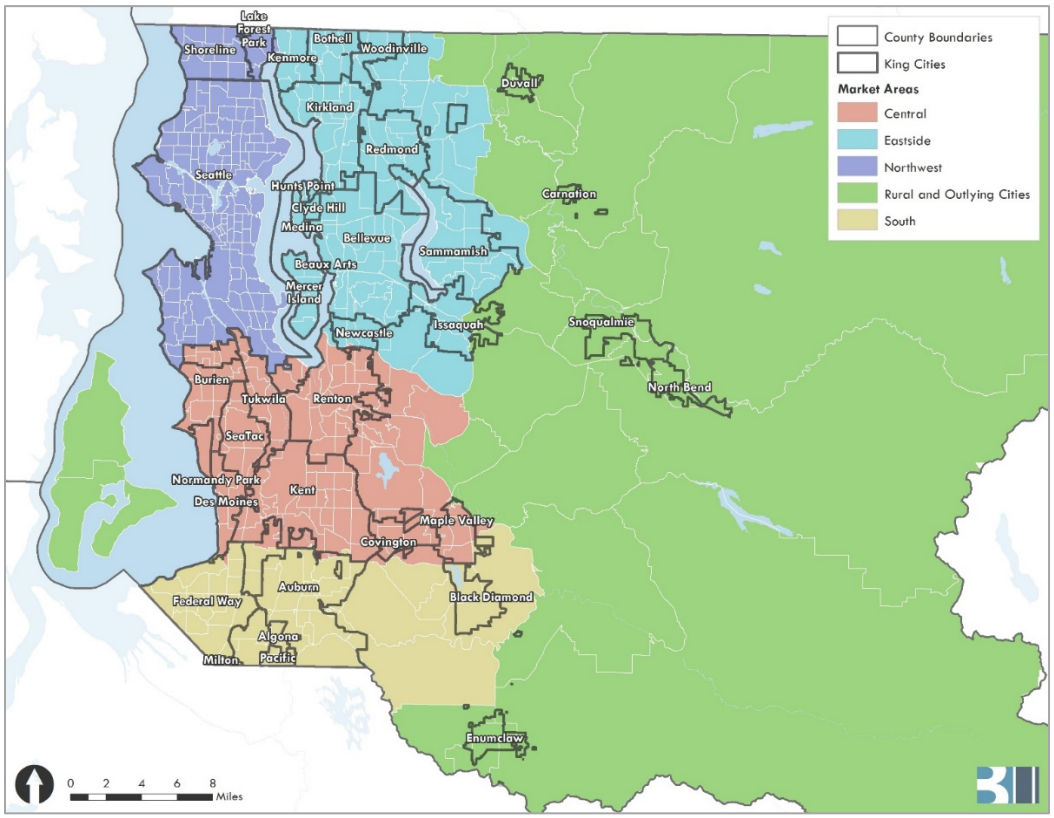
To prepare for the 2021 Urban Growth Capacity Report, an analysis of recent employment densities compared to past densities across King County was performed.[2] The analysis compared the amount of industrial and other commercial jobs to the aggregated amount of similarly classified non-residential built space in subareas covering King County to calculate ranges in employment density. This analysis was performed on 2006 and 2019 data to observe if employment density patterns have changed over time. The recommended ranges by subarea and general land use type (commercial/mixed use or industrial) are shown in Figure 4. A map of cities by subarea is included in Figure 5 below, and a city-specific table is included in the reporting table template and the employment density guidance document.

*Figure 4: Recommended Square Feet per Job Ranges by Subarea*

| Market Area | Average 2006 Employment Density (all zones) | Average 2019 Employment Density (all zones) | Recommended Range for Commercial and Mixed-Use Zones | Recommended Range for Industrial Zones |
|---|---|---|---|---|
| Central | 655 | 608 | 300–600 | 700–1,200 |
| Eastside | 398 | 386 | 200–400 | 500–800 |
| Northwest | 445 | 415 | 200–400 | 500–800 |
| Outlying Cities | 669 | 630 | 300–600 | 700–1,200 |
| South | 701 | 724 | 300–600 | 700–1,200 |

[2] *2021 King County Urban Growth Capacity Report Employment Density Guidance*, BERK Consulting, 2021. Full guidance included in reporting package.

*FIGURE 5: EMPLOYMENT DENSITY SUBAREAS*




### *Selecting Employment Density for Your City*

The final task for calculating employment capacity will be reporting selected employment densities in the phase 4 reporting tables. Recommended ranges for your city are supplied in the reporting table template. If you select employment density values outside of the recommended range, please record specific rationale or alternative methods for doing so in the reporting table. The employment density guidance contains additional detail on pages 8-9 for refining employment densities within the recommended range for your city.

## *Guidance for Filling Out the Reporting Tables*

### *About the Reporting Tables*

The Phase 4 reporting table template consists of four tables. The reporting tables have been populated with data from previous phases of data reporting and programed with calculations to facilitate completion of this round of reporting. Columns include a header with a description of the calculation used to trace how data is used in across the table. **Columns that require input values are highlighted in yellow.**

City staff completing reporting will input selected market factor values by zone on Table 1, column E; and Table 2, column K. Selected employment densities will be inputted by zone on Table 3, column C. Table 4 includes the final capacity calculation. This calculation is primarily automated from values in the reporting tables, but a few values need to be inserted as indicated in the Table 4 explanation below. **As a final step before submitting your tables, back to King County, please review calculated capacity in Table 4.**

## *Reporting Tables*

The below copies of the tables in the reporting table template include mocked-up examples of completed reporting, but otherwise mirror the versions provided in the table template. Each city has a version unique to their jurisdiction that reflects inputted phase 3 data, and recommended market factor or employment density ranges based on the guidance described in previous sections.

*FIGURE 6: REPORTING TABLE 1: MARKET FACTOR*

| Zone | Zone Type | Market Factor Alignment (Low, Med, High) | Market Factor Range (%) (Based on Place-Type, Zone Type, and Market Factor Alignment) (See Guidance) | Final Market Factor | Comments (if final market factor is outside of the suggested range) |
|---|---|---|---|---|---|
| Zone Name | SFR, MFR, MU, Comm, Ind | Selected from Market Factor Guidance | Selected from Market Factor Guidance | To be decided by city staff. Please consult market factor guidance. | Please provide comments if final market factor is outside of the suggested range |
| Example 1 | MU | Med | 10% - 20% | 15% | N/A |
| Example 2 | Comm | Low | 5% - 10% | 20% | Owner of only vacant land directly opposed to development |

Table 1 includes all zones imported from phases 2 and 3 of data reporting, and their land use type (zone type) classification. Select a market factor within the given range in column D, and provide any documentation if selecting a value outside of the given range.

*FIGURE 6: REPORTING TABLE 2: INITIAL CAPACITY*

| **Zone** | **Mixed Use Zone** | **Land Use** | **Vacant/ Redevelopable** | **Assumed Density (DU/Acre)** | **Land Supply Area** | **Right of Way %** | **Public Purpose %** | **Final Market Factor %** | **Buildable Area (Acres)** | **Initial Residential Capacity (Housing Units)** |
|---|---|---|---|---|---|---|---|---|---|---|
| Name of Zone | Y/N | SF/MF/MU | Select Vacant or Redevelopable | From Phase 3 | From Phase 3 | From Phase 3 | From Phase 3 | From Table 1 | = Column F * (1 - Column G - Column H - Column I) | = Column E * Column J |
| Example1 | N | MF | Vacant | 24.2 | 9.7 | 15% | 10.0% | | 7 | 176.6 |

| **Existing Units on Redevelopable Parcels (Housing Units)** | **Initial Capacity summed by zone (Housing Units)** | **Existing units on redevelopable parcels summed by zone (Housing Units)** |
|---|---|---|
| From Phase 3 | To help with calculations on Table 4 | To help with calculations on Table 4 |
| 0 | 235.8 | 12.0 |

Table 2 has two sub-tables, one for initial residential capacity, and one for initial non-residential capacity. Only the residential table is shown above. The non-residential table has an identical format, but is tailored to calculating developable square footage, not housing units.

Table 2 is largely imported from the final table in phase 3 data reporting. It includes almost all the data necessary for calculating capacity. In column I, input the selected market factor by zone from Phase 4 Table 1.

*FIGURE 7: REPORTING TABLE 3: EMPLOYMENT DENSITIES*

| Zone | Zone Type (Ind/Comm/MU) | Square Feet Per Job |
|---|---|---|
| Example 1 | MU | |

*If you are uncertain about how many square feet per job should be selected for each zone, please consult our employment densities guidance.*

Table 3 also includes the following reference table (nothing to be reported by the city)

Recommended Ranges for City

| Recommended Range: Commercial and Mixed-Use Zones | Recommended Range: Industrial Zones |
|---|---|
| 200–300 | 450–700 |

*For more information on these ranges please consult attached guidance on employment densities.*

*FIGURE 8: REPORTING TABLE 4: FINAL CAPACITY*

| Zone | Zone Type | Initial Residential Capacity | Existing Dwelling Units on Redevelopable Parcels | Development in the Pipeline | Final Residential Capacity (Dwelling Units) |
|---|---|---|---|---|---|
| *Name of the Zone* | *SFR/MFR/MU* | *From Table 2* | *From Table 2* | *From Phase 2* | *= Column C + Column E - Column D* |
| Example 1 | MU | 1,809 | 0 | 0 | 1,809 |

Table 4 has two sub-tables, one for residential capacity, and one for non-residential capacity. Please review this table, as it records the final capacity to be compared to the remaining target. As you select market factors, the calculated initial capacity will change. It will be lower than the initial capacity from phase 3 data reporting, as market factor discounts the land supply.

Input values for employment densities selected in Table 3 into Table 4 column G (non-residential table only). Also add any information on major planned developments to their appropriate zones in column E.

Pay special attention to any zones that your city has that are specific to single developments, institutions, or master planned areas. If applicable, we recommend using any capacity values relating to developer agreements, master plans, plats, or any other controlling documents rather than calculating capacity for these types of zones.

## Wrapping up

Once you have completed phase 4 reporting, send the completed table and all necessary documentation back to King County staff: Ben Larson blarson@kingcounty.gov and Rebeccah Maskin rmaskin@kingcounty.gov.

Quality capacity data is the central product of the Urban Growth Capacity Report, and we cannot complete it without your support. You have our most esteemed respect and gratitude for completing this portion of King County's growth management journey, and we look forward to continuing to work with you as we compile findings for the report and complete additional analysis on achieved densities and growth targets, in addition to overall capacity findings.

A hearty THANK YOU for reading this guidance and partnering to complete this report. Please schedule time if you need technical assistance, or get in touch if you have any questions.

# Appendix E: Market Factor Guidance

# King County Urban Growth Capacity Report

*Market Factor Guidance*

January 2021

King County

BERK STRATEGY ■ ANALYSIS ■ COMMUNICATIONS

HEARTLAND

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# 1. Market Factor: Introduction

## Intro and Purpose

The Market Factor, also known as the Market Supply Factor, is a final adjustment to the buildable land supply that follows other deductions that account for critical areas, infrastructure gaps, right-of-way, and future public facilities. It accounts for the percentage of buildable land that is unavailable or infeasible to develop during the 20-year planning period. Historically, it has been used as a proxy to account for landowner preferences and unwillingness to sell, with various methodologies and approaches employed to develop and inform the assumption. As stated in the Department of Commerce's 2018 Buildable Lands Guidelines:

> *Over a 20-year planning period, not all land will be available for development or redevelopment, no matter how suitable. One key constraint on property availability is market availability, or whether or not land will transact for purpose of development or redevelopment. Owners of property that could be developed or redeveloped may have no interest in selling or developing over an extended period of time for any number of reasons.*

E2SSB-5254 introduced new language regarding the overall buildable lands reporting requirements including new recommendations related to Market Factor assumptions. As part of King County's 2020/2021 updated Land Capacity Analysis the County is seeking guidance on development of Market Factor assumptions for municipalities across the County. King County, as mandated by GMA requirements, now seeks to develop a process and methodology for implementing Market Factors that comport with the revised buildable lands guidelines, and better reflect more current market realities present across the region.

## Definition of Market Factor

**Department of Commerce Guidelines.** Several definitions of Market Factor are discussed in the Department of Commerce's 2018 Guidance Publication (see *Buildable Lands Guidelines, 2018).* Included are several references to the Revised Code of Washington (RCW) as well as the Washington Administrator Code (WAC). Overall, the guidelines describe Market Factor as:

> *Market Supply Factor is the estimated percentage of developable land contained within an urban growth area that is likely to remain unavailable over the course of a 20-year planning period and is, in practice, the final non-developable land deduction when calculating lands suitable for development and redevelopment.*

## Process Overview

The following is an overview of the process utilized to develop Market Factor guidance for King County.

- Review Commerce guidance and past studies/methodologies
- Explore and evaluate potential methodologies, data sources and implementation frameworks
- Engage with planners and development community to inform methodology
- Conduct test fit analysis to inform Market Factor guidance (similar to case study examples to test data sources and results of the proposed methodology)
- Develop a framework for each City to evaluate and select a Market Factor assumption
- Recommended Market Factors for application across King County
- Create a "menu" of options organized by geography, product and market typologies
- Provide additional discussion and recommendations related to specific conditions that may impact the Market Factor assumption

## Engagement

A critical component of the overall approach was the engagement with the public and private sector planning and development communities. The following groups were engaged throughout the development of the guidance document.

- King County Urban Growth Capacity (UGC) Technical Committee
- External Stakeholders (workshop and survey)
- City of Seattle

## Engagement Process to Inform Market Factor

To inform development of a methodology for Market Factor, Heartland and Berk leveraged King County's UGC Technical Committee to discuss and review potential Market Factor methodologies. A survey was also distributed to the group of planners and feedback from the process was used to inform how the methodology and overall framework were developed.

In addition, a stakeholder focus group and survey were conducted to inform the development of the Market Factor Methodology as well as to validate conditions affecting the availability of land. A diverse list of professionals active throughout King County comprised primarily of developers and industry association representatives were invited to attend a discussion of the King County Land Capacity Analysis, and more specially, to discuss Market Factor. In attendance were a mix of representative including:

- Public sector representatives
- Industry/Association advocates
- Representation from both market-rate and income-restricted housing developers
- Developers/professional with expertise in multifamily, mixed use and single-family development
- Affordable Housing Advocacy Organizations

Below are highlights from the discussion. Bolded items are also discussed later in the guidance document.

### *Single Family Discussion*

What We Heard:

- Political environment
- Reevaluate what is redevelopable
- **Issue of up-zones, resulting land price increase and impact on feasibility**
- **Slow turnover rate of SFR in MF or MU zones**
- Anticipate that regulations will only get tougher
- High degree of variability between cities in permit process/timing
- Lack of land zoned for townhomes
- On up zoned parcels, if too slow to convert large SFR lots into higher density, they will be redeveloped into more expensive SFR
- **Pricing expectations**

### *Multifamily and Mixed-Use Discussion*

What We Heard:

- Permitting process and timing impacts matter
- **Access to transit** shapes project feasibility
- Missing/inadequate infrastructure in smaller communities to support higher density housing
- **Restrictive covenants impacts** newly up-zoned areas
- Emphasized need for predictability
- **Consider sale volume and growth as an indicator**
- Discussion of outlier communities:
  - **Mercer Island an example of a high price but limited growth community**
- Consider the existing land use mix and connections to employment centers
- **Consider physical parcel attributes**
- Include additional details for considering unique conditions and associated data sources to further evaluate

## Approach

The guidance developed for King County focuses on a real estate product-type framework, wherein Market Factor assumptions/recommendations are organized by major real estate development typologies, also called product-types for the purposes of this report. Market Factor is to be selected by product-type and regional geography and applied to land capacity in areas of where the product type is projected to be the predominant use for a given zoning designation.

The approach to Market Factor for King County considers demonstrated supply, demand and projected capacity (projected for the 2021 UGC study). Demonstrated supply is informed by historical development deliveries. Relative demand for product is measured by both pricing and historical delivery by product type. All deliveries are measured in either residential units or non-residential square feet. The data referenced above were selected after a review of the Department of Commerce Buildable Lands Guidelines, review of former analysis of Market Factor conducted by King County as well as an evaluation of alternative data sources available at a County-wide scale.

This approach evaluates the recent demonstrated delivery rate for a certain product-type applied to a 20-year planning period as a ratio to the current projected capacity. This highlights the relationship between what is being developed by the market historically and the capacity a city is projecting into the future.

Rather than use the ratio to directly calculate a market factor, it is instead used to indicate and inform reasonable ranges of market factors and adjustments that cities in similar geographies and comparable market alignments can then choose to apply. These ranges serve as guidance and are recommended in Step 2 of the Market Factor Guidance Section. Additionally, cities can reference these ratio calculations for other cities to assess their own market factor assumptions and evaluate areas with different market conditions and historical development patterns.

### Approach Considerations

The Market Factor assumption as applied in the Land Capacity Analysis framework is designed to account for a myriad of non-physical development conditions that would limit or prohibit the development of certain lands in the future. The approach, methodology and data sources in the guidance document are leveraged to inform the recommended ranges and selection framework, but are not meant to be directly translated to actual Market Factor percentages in a given City's estimates. *For example,* projecting a linear historical delivery trend does not necessarily represent the actual delivery trends for coming 20 years, but rather provides important context for how a City has grown historically versus how it expects to growth in the future.

### Approach to City of Seattle

The City of Seattle, as one of two designated Metropolitan Cities in King County and the largest and most diverse City in the region, was analyzed at a more granular level than other Cities in King County. This is due to its geographic scale, total population and relative importance in terms of overall impact on capacity in King County. Seattle's distinct neighborhoods and zoning also allow for a more granular analysis and application of Market Factor. Seattle specific guidance is provided in the Appendix of document on page 40. It is important to note that the methodology for the City of Seattle is the same as the one used across the County, only at a neighborhood scale. The approach and framework herein does allow for more granular application of Market Factor in Cities where it may be appropriate, such as the City of Bellevue.

## Why use this approach?

- Historical deliveries by product-type data is the best proxy for the nexus of real estate market conditions, willingness to sell and other factors that limit the development of land.
- This approach leverages readily available data from the King County Assessor to provide uniform analysis across all jurisdictions on existing supply, new deliveries, units and predominant use breakdowns to provide a historical and current market evaluation.
- The approach considers the demand for development land and attempts to account for the complexities associated with development economics that most often drive development decisions.
- The approach provides an empirical approach to deriving more realistic assumptions but also provides flexibility for Cities to address more qualitative and subjective conditions.
- The framework allows for a zone-by-zone approach for considering and selecting market factors for cities that wish to do so. Some cities may not have the complexity or need to apply Market Factor at that scale and may elect to apply at a City-wide scale.

The exhibit below depicts the overall process for selecting Market Factor deductions to apply to each City's capacity analysis.

### *Approach Summary*

Analyze development patterns over the last 20 years by regional geography and product-type:

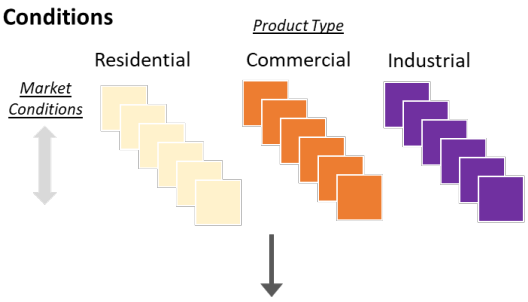
- What was delivered over the last 20 years by product type?
- How do historical rates of deliveries align with future capacity planned in the area?
- How does current supply for any given product type align with projected capacity?
- Leverage this data to inform Market Factor recommendations.

Provide recommendations for determining Market Factor based on:

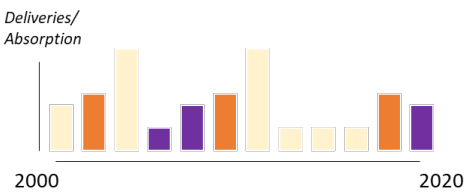
- Product-type
- Regional Geography
- Market conditions
- Other known market constraints

## Methodology Overview

**A. Select *Representative Geographies (Place Types)* to Assess Market Factor by Product Type and Market Conditions**

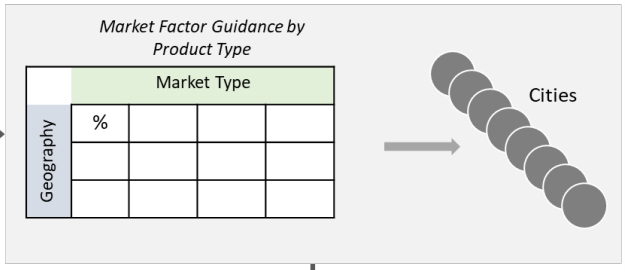



**B. Analyze Historic Development Patterns and Historical Market Indicators**




**Market Factor %**
Estimate Market Factor based on % of real estate absorption by product over that time period

**C. Cities select from a range of market factors organized by product type and market conditions**




**D. Cities refine and address local conditions where desired**

# Market Factor: Key Definitions and Reference Terms Explained

The following terms and definitions are key to understanding the methodology and using the guidance document.

**Product-type:**
This refers to the general type of product that new construction would deliver in a particular zone. Using the *Product-type* in this approach serves as a bridge in applying market data to a jurisdiction's capacity data. Detailed *Product-type* definitions are provided in Table 1A under the first step in the Market Factor Guidance Framework.

**Regional Geography:**
This represents the PSRC *Regional Geographies* outlined in the PSRC Vision 2050 document. These are used to serve as place-type groupings for cities based on shared characteristics.

**Market Factor Indicators:**
The methodology centers around calculating *Market Factor Indicator* values. These values provide an indication of how capacity would be absorbed based on the annual delivery rate of development (by Product-type) found over the past 5-years. The indicators are not meant to directly translate into market factors but are intended to inform *Market Factor Alignments* and the *Market Factor Ranges* (both defined herein). Note: the analysis evaluated both the 5-year annual average and 20-year annual average historical deliveries.

The *Market Factor Indicator* applies the 5-year average historical delivery rate to the estimated capacity of a given geography over a 20-year planning horizon. This calculation as it relates to the projected capacity is used to indicate what percentage of the capacity is not absorbed over the coming 20 years. The resulting percentage value serves as an indicator of the amount of buildable land that is unavailable or infeasible to develop during the 20-year planning period

**Market Factor Alignments:**
Three specific groupings for assigning *Market Factor Ranges* (low, medium, and high) are provided. These are assigned by *Product-type* and *Regional Geography.*

The *Market Factor Indicators* for all cities are compared to each other for each *Product-type*. Given the range of *Market Factor Indicator* values, Cities are then grouped into low, medium, or high *Market Factor Alignments* based on how the Cities' *Market Factor Indicator* rankings compared to other cities (see Tables A1-4 in the Appendix). The Cities are then segmented by their respective *Regional Geographies*.

**Market Factor Ranges:**
*Market Factor Ranges* represent the range of Market Factors derived for King County organized by *Product-type* and *Regional Geography*. The ranges are informed by *Market Factor Indicators* and available market data (see page 10 to learn more about how the ranges were informed).

- For each *Product-type* and the corresponding *Market Factor Alignment,* a city can use the Table of *Market Factor Ranges* to serve as initial guidance for selecting a Market Factor.
- The discretion to select a value within the informed range or outside the range is left to each individual City. The comparative approach of this methodology is intended to provide flexibility for cities and allow them to make informed assumptions based on this framework but also leverage their unique knowledge of local conditions affecting capacity and future availability of land.

## Methodology Overview

**A: Establish the Market Factor Indicator through analysis of historical deliveries and the planned capacity for the coming twenty-year planning period.**

| | |
|---|---|
| Measurements: | 5-year avg. annual deliveries<br>Cities' Planned capacity |
| Regional Geographies: | PSRC Regional Geographies classifications. |
| Data Sources: | - King County Parcel Data<br>- Year 2020 King County Buildable Lands Data<br>- PSRC Regional Geographies |
| Output: | Market Factor Indicators for all Geographies and product types |

**Process :**

- Assemble and evaluate past deliveries by evaluating the 5-year and 20-year average annual deliveries. These are used to project trends into the future.
- Evaluate Assumed capacity estimated by King County cities using UGC Phase III data. Assign this capacity data by product type based on zoning.
- Create an indicator by extending the 5-year annual delivery trend over the 20-year forward planning period and express as a percent of projected capacity. This gives an indication of what percentage of the planned capacity will be absorbed over the coming years. This indication can also be used to calculate what percentage of capacity does NOT develop over the 20-year planning horizon, which serves in this analysis as an *indicator* for Market Factor. The values from this analysis informed Market Factor recommendations but were not used to directly calculate Market Factors.

**B: Establish Market Factor Alignments for all cities and general product types in King County**

In the next step, cities were sorted into Low/Med/High Market Factor Alignment categories, based on the relationship of their Market Factor Indicators for each Product-type.

**C: Establish Market Factor Ranges for each Regional Geography, Product-type and Market Factor Alignment.**

- The Market Factor Indicators from Part A inform a reasonable baseline for the Market Factor Ranges for each city type, product type and Market Factor Alignment – covering every combination of these segments.
- Market price data (rents, median house prices) are used to inform how these ranges should be distributed among Market Factor Alignments (Part B) for each Product-Type.
- The Market Factors used in previous buildable lands analyses (referenced in **Appendix Table A10**) helped inform the maximum market factor (50%) to be found in the menu of ranges and provided useful context when evaluating appropriate ranges for cities to consider.

**D: Adjustments – Cities can refine and adjust the Market Factor based on local analysis.**

- Cities should adjust their Market Factor within the either the range provided OR the range that aligns most closely with the cities' market conditions.
- Further discussion of these adjustments is provided in step 4 of the Market Factor Guidance Framework.
- Additional data are provided in the appendix to aid cities in adjusting and in potentially re-aligning with another range that may better represent market conditions anticipated over the 20-year planning horizon.

## Methodology Summary

**A**: Establish the Market Factor *Indicators*

**B**: Establish Market *Alignments* for each City and each Product-Type

**C**: Establish Market Factor *Ranges* for each Regional Geography , product type and Market Factor Alignment.

**D**: Refine and Adjust Market Factor

## Chosen test-fit Market indicators:

| Product Type | PSRC Designation | Test Fit City | Test-Fit Market Factor Range Alignment | Market Factor Indicator |
|---|---|---|---|---|
| Multifamily | Core City | Kirkland | Low | 0.08 |
| Multifamily | HCT | Kenmore | Low | 0.07 |
| Multifamily | Cities and Towns | Covington | Medium | 0.23 |
| Multifamily | Metropolitan | Bellevue | Low | |
| | | | | |
| Single Family | Core City | Kirkland | Medium | 0.18 |
| Single Family | HCT | Lake Forest Park | Medium | 0.34 |
| Single Family | Cities and Towns | Pacific | Medium | 0.5 |
| Single Family | Metropolitan | Bellevue | Low | |
| | | | | |
| COM(off) | Core City | Federal Way | Medium | 0.5 |
| COM(off) | HCT | Mercer Island | Medium | 0.5 |
| COM(off) | Cities and Towns | Snoqualmie | Medium | 0.48 |
| COM(off) | Metropolitan | Bellevue | Low | |
| | | | | |
| Industrial | Core City | Redmond | Medium | 0.5* |
| Industrial | HCT | Woodinville | Low | 0.5* |
| Industrial | Cities and Towns | Enumclaw | High | 0.5* |
| Industrial | Metropolitan | Bellevue | Low | |

The table to the left shows each test fit city for each Regional Geography grouped by each Product-type.

**NOTE: the Market Factor upper bound was limited to 0.5, if there was value greater than this value, it was reduced to 0.5*

**Process:**

This process leverages the calculated *Market Factor Indicators* and identifies a test-fit city in each Regional Geography that has a reasonable alignment of historical deliveries and projected capacity. The test-fit city's indicator value is used as the foundation for the market factor range. The Market Factor Alignment for the test fit geography serves as the starting point for deriving the range, and the bounds for the ranges found under the remaining Market Factor Alignments (low/med/high) are derived through examining market pricing data (median sales price for single-family, and average rents for all other product types as shown in the Appendix Tables A5-9). These adjustments to find the bounds consider both the average price points and the range of prices across cities in King County. With higher ranges of market price data, a wider range of Market Factors generally resulted.

To ensure that the recommended Market Factor Ranges provided in the Guidance Document are reasonable and not overly impactful to a given City's estimated capacity, historical Market Factor assumptions were reviewed to inform an upper limit on the ranges across all product types.

**Summary:**

In summary, the Market Factor Ranges provided later in this document are informed by a review of calculated Market Factor Indicators and selection from this dataset to establish baseline Market Factor assumptions by Product-type and PSRC Geography. Baseline values were selected from those cities that illustrate relative alignment between historical deliveries and the projected capacity.

Smaller Market Factor Ranges are found where pricing of a given Product-type is more clustered and the overall range of pricing is smaller. Where large differences in pricing for a given Product-type exists, the resulting Market Factor Ranges are larger. These larger Market Factor Ranges reflect the variability in market conditions found for a given Product-type across a particular Regional Geography. This is reflected in Exhibits 1b-3b on the following pages.

## Historical Delivery Data

Analysis of historical development patterns across King County began with the compilation and detailed analysis of King County Assessor data. Assessor data provides detailed information on each parcel within the County as well as building specific attributes. Leveraging this information, Heartland established the following:

- Number of residential units by jurisdiction
- A county-wide time-series of delivery data, based upon year of building/unit completion
- Square footage of development by year completed
- Building predominant use, and total square footage of each sectional use.

**Product Classifications Assigned to Assessor Data:**

| Residential | Non-Residential |
|---|---|
| Single Family | Industrial |
| Multifamily/Mixed Residential | Office |
| | Retail |
| | Commercial (non-industrial) |

**Exhibits 1 - 3** Charts on the following pages illustrate overall development patterns across the County organized by Regional Geography. The data illustrates overall development patterns by specific Product Type.

The historical delivery data provides a proxy for a number of issues raised in the Buildable Lands Guidelines to which Market Factor is meant to address. These data provide a valuable indicator of:

- Demand for a given product in any given geography.
- The efficiency of the market to deliver the product.
- Willingness to sell.
- Impacts of planned or completed infrastructure.
- Other factors impacting the availability and development of land.

## Other Data Analyzed

**Capacity Data:** Another key data point used to help inform this methodology includes the capacity data projected by each city by zone for the 2021 Buildable Lands Report.

**Historical Market Data:** Historical pricing data, for each market product-type were also analyzed. Other market data includes rental rates, sale pricing, vacancy, and the growth/trends associated with each of these, which are also previewed in exhibits 1-3.

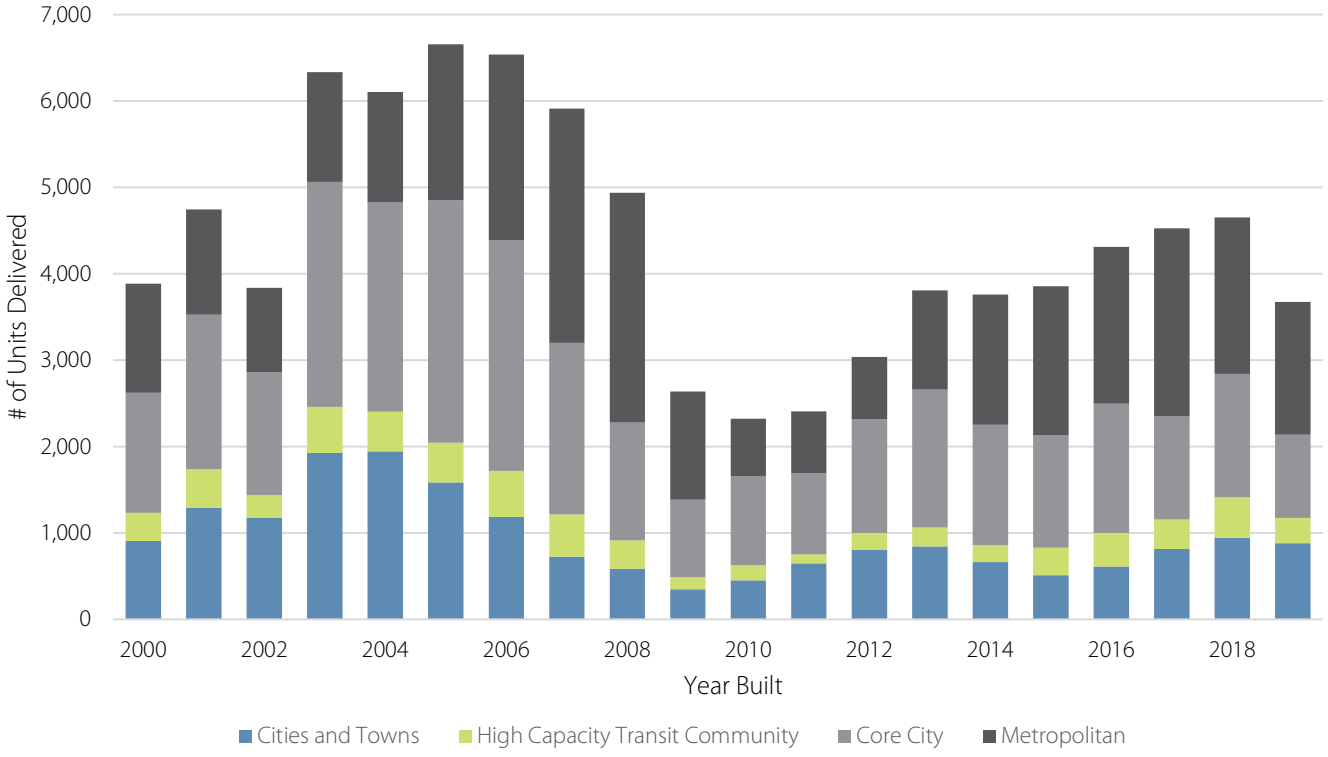
The three data sources combined provide a viewpoint of:

- Historical development deliveries by product type.
- Planned future capacity for a given Product-type.
- Current and past geography specific market conditions for the given product types.

## *Data Limitations:*

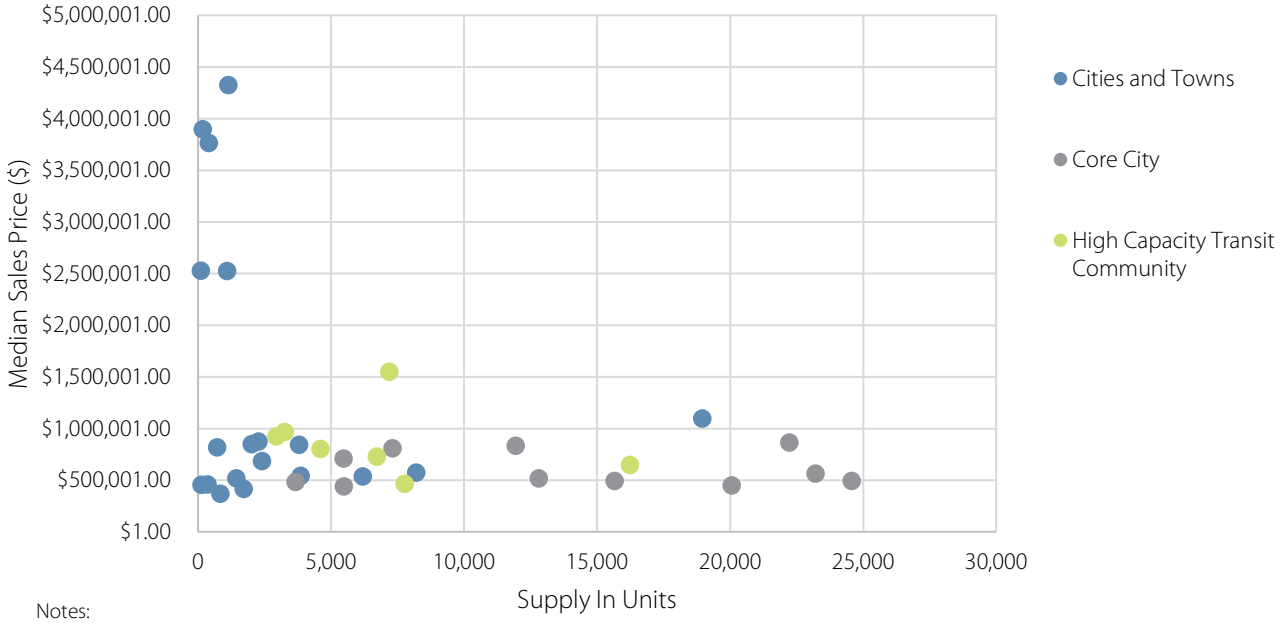
*Several limitations exist and are important to acknowledge in the context of their impact to inform the Market Factor assumptions contained later in the Guidance Document. None of the data discussed herein lend themselves to a directly translatable Market Factor value, rather they are used to inform ranges and recommended assignments. In addition, it is important to note that with historical delivery data the year-built attribute may not align directly with a City's permitting data. In addition, for the purposes of the analysis, assumptions were made in classifying the building's product type based upon the predominant uses and overall residential densities.*

## Exhibit 1a: Single Family Unit Deliveries, 2000-2019




Source: King County Assessor Data

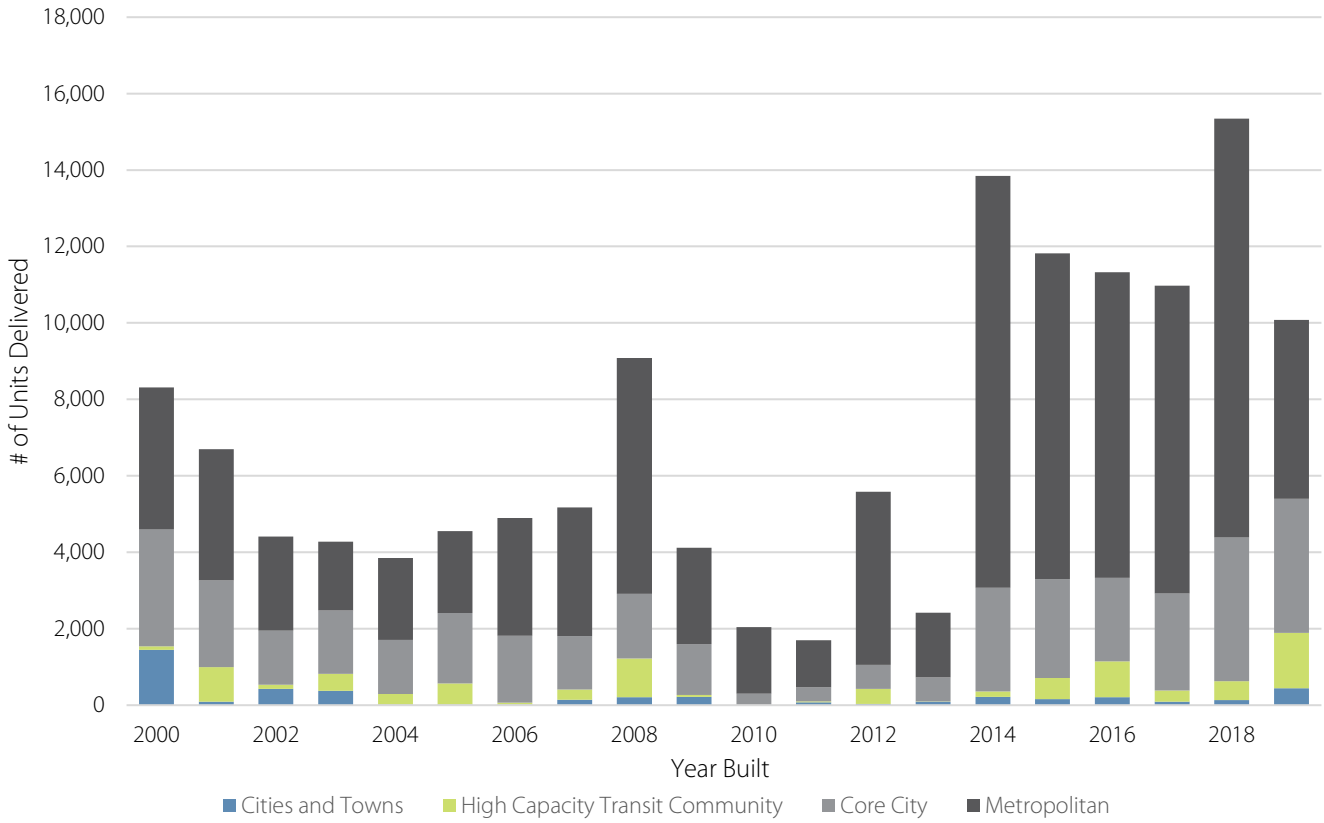
## Exhibit 1b: Single Family Unit Supply and Median Sales Price




Notes:
Metro's are excluded from Exhibit 1b for readability, as supply greatly exceeds that of the other cities.
Single family is inclusive of attached single family units and townhomes

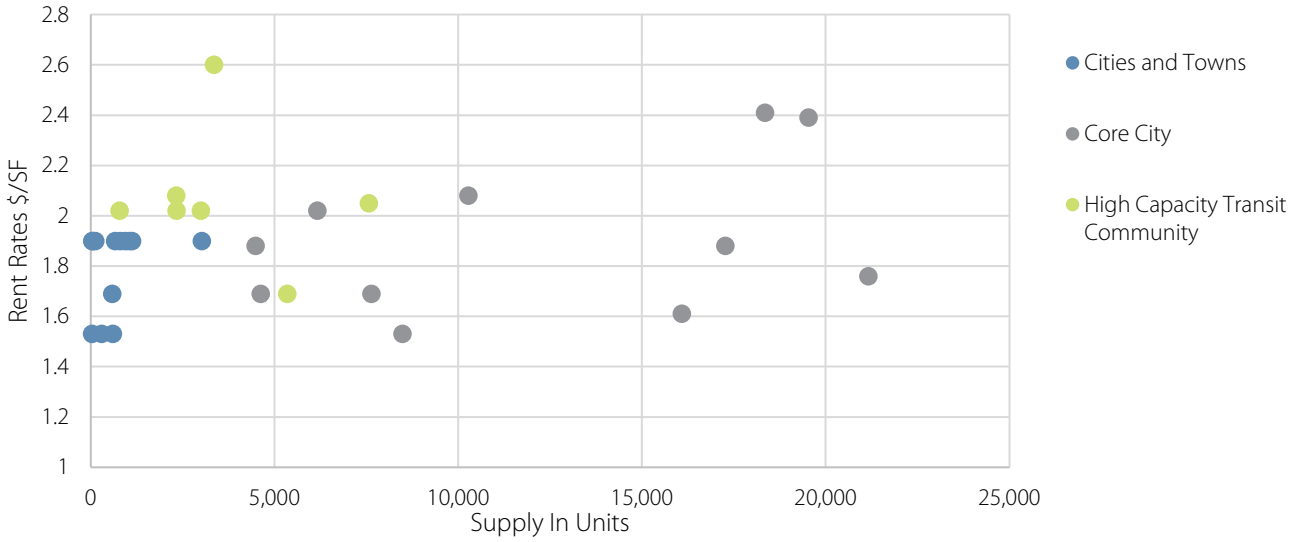
*Source: King County Assessor Data, Redfin*

## Exhibit 2a: Multifamily & Mixed-Use Unit Deliveries 2000-2019




Source: King County Assessor Data

## Exhibit 2b: Multifamily & Mixed-Use Supply and Current Rent ($/square foot)

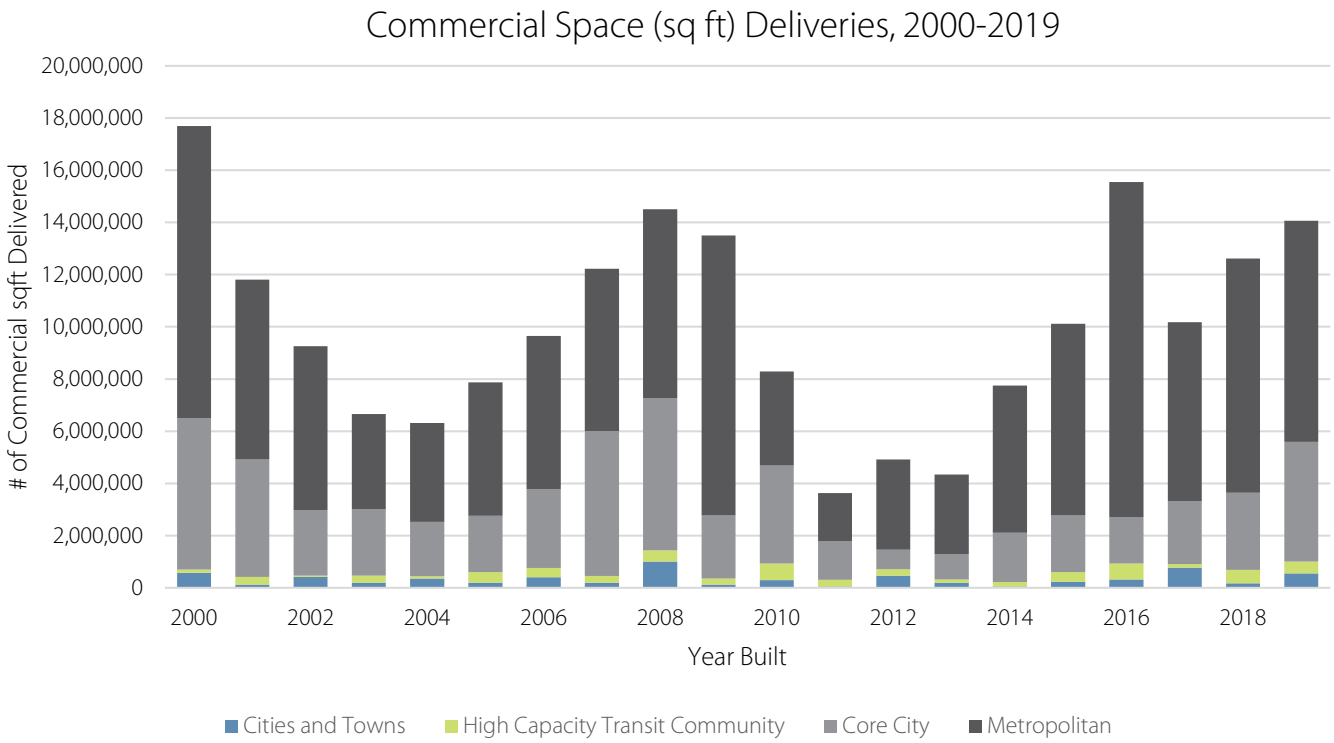



Notes:

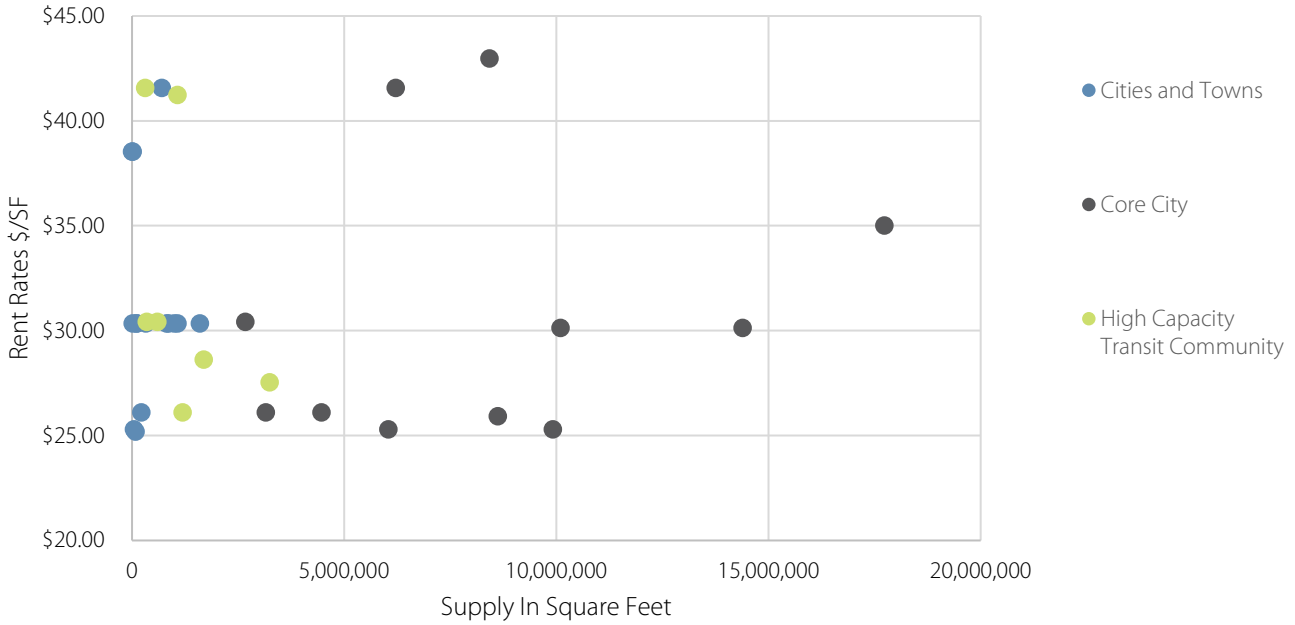
- Excludes Cities with Zero Supply; Assessor data completion year can come before actual occupancy and this may be reflected in 2019.
- Metro's are excluded from Exhibit 2b for readability, as supply greatly exceeds that of the other cities.

*Source: King County Assessor Data, Costar*

## Exhibit 3a: Commercial Space (sq ft) Deliveries 2000-2019




## Exhibit 3b: Commercial Supply and Current Rent ($/ sq ft)




Notes:

- Metro's are excluded from Exhibit 3b for readability, as supply greatly exceeds that of the other cities.

*Source: King County Assessor Data, Costar*

## Connecting Market Factor and other UGC Assumptions

**Key considerations**

Market conditions also enter the capacity analysis through other assumptions in the Urban Growth Capacity analysis. These assumptions can affect the values of selected market factors. Below is additional commentary on other assumptions made within the capacity analysis framework and how these assumptions should be considered when using the Market Factor Guidance document. It is important to note that all of the assumptions discussed are calculated and applied outside of the application of the Market Factor deduction and represent stand alone assumptions estimated by each City.

- **Identifying Redevelopable Lands.** The approach to identifying redevelopable lands and the selected thresholds for determining what could be redeveloped in the future is of great importance to how a City's capacity relates to market conditions and future development economics and conditions. More conservative thresholds, i.e., those that anticipate that less redevelopable lands will develop over the planning period, would result in less redevelopable land being available. Less conservative thresholds would result in more land being available for redevelopment, and may warrant the selection of a market factor at the higher end of the suggested range, depending on market strength. Each City should evaluate how their redevelopment assumptions already incorporate market conditions (or not) when selecting a Market Factor to apply.
- **Assumed Densities.** The density at which property develops in the future is in part dependent on market conditions and greatly impacts overall capacity. Each City has studied historical achieved densities and planned densities to arrive at an assumed density assumption. Where appropriate, each City should evaluate whether their assumptions reflect more aspirational product types and densities versus historical development patterns and achieved densities in a given zone and consider this when selecting a Market Factor to apply.
- **Infrastructure.** Analysis and deductions have been completed to account for deficiencies in infrastructure which could limit the development of land in the future. Jurisdictions may want to consider higher Market Factors for zones or land supply included as capacity, but requiring infrastructure investments to serve the assumed density. This adjustment would be intended to reflect the cost of the infrastructure investment, which was not a component of the previous infrastructure gaps analysis. This would only be a valid consideration where Cities believe the initial applied infrastructure gap deductions do not fully represent the infrastructure challenges in a given area.

# 2. Market Factor Guidance: *Framework*

## Framework Overview

The following provides an overview of the Market Factor guidance framework developed for King County. There are four distinct steps defined within the framework outlined below. Additional details and data are provided on the subsequent pages detailing each step.

| Step | Explanation of step | Definitions and Reference | Details |
|---|---|---|---|
| **Step 1.** Identify Zoning by Predominant Product-Type | Identify the predominant Product-type in each zone of the City where capacity exists | Explanation of each Product-type (Table 1A) | • Select the Product-types that align with the zones within your City that have capacity<br>• The Product-type would be the predominant use expected to develop in each corresponding zone |
| **Step 2.** Identify Regional Geography and Market Alignment | Identify and align PSRC Regional Geographies and Market Conditions | Menu of Regional Geographies (PSRC) and Market Factor Alignments (Tables 2A-2D) | • Select applicable Regional Geography based on the Menu<br>• Select appropriate Market Factor Alignment from menu |
| **Step 3.** Select from Market Factor Ranges | For each Product-type select a Market Factor Range to apply to the capacity analysis | Market Factor Ranges (Table 3A) | • Find correct table, review and use the selected range to inform Market Factor assumption prior to adjustments in Step 4. |
| Step 4. Adjustments | Adjust selected Market Factor Range assumptions based on known conditions | Condition Considerations (Table 4A) | •Review known conditions that impact Market Factor (p. 12)<br>•Evaluate applicability in your City<br>•Adjust Market Factor assumption based on on-the-ground conditions in your jurisdiction, and document in table template. |

| **Step 1 :** Identify Zoning by Product Type | |
|---|---|
| **Explanation of step** | Identify the predominant Product-Type in each zone of the City where capacity exists |
| **Definitions and Reference** | • **Table 1A - Product-type Reference**<br>Select applicable Product-types on the following page |

## Directions

In Step 1, assign the applicable Product-type to each zone based upon the anticipated predominant uses in the corresponding zone.

To better understand the Product-types used in this guidance, reference **Table 1A: Product-Type Reference**

The Product-type assigned to each zone should represent the predominant building typology and use that is likely to occur. This can be based on past buildout within a given zone *OR* the Product-type envisioned and supported by the zoning regulations and requirements.

## Example

***Zoning Designations***

***Product-Types***

| **Residential** |
|---|
| Single Family |
| Multifamily/Mixed Residential |
| **Non-Residential** |
| Industrial |
| Office |
| Retail |
| Commercial (non-industrial) |

***Capacity Tables***

| Zoning | Mixed use (y/n) | Land Use | Product-type | Mkt Factor |
|---|---|---|---|---|
| R1 | N | SF | Single Family | |
| R4 | N | SF | Single Family | |
| R6 | N | SF | Single Family | |
| R12 | N | MF | Single Family | |
| R18 | N | MF | Multifamily | |
| R24 | N | MF | Multifamily | |
| R48 | N | MF | Multifamily | |
| (MHC) | N | | Single Family | |
| NB | Y | MU | Mixed Res | |
| CB | Y | MU | Mixed Res | |
| DR | Y | MU | Mixed Res | |
| | | | **TOTALS** | |

## Table 1A – Product-Type Reference

| Product-type | Description/Application | Illustrative Examples |
|---|---|---|
| **Residential** | | |
| Single Family | All areas where single family residential product inclusive of any of the following listed as the predominant use: detached, duplex, tri-plex four plex or townhouse plat. | Detached single family homes and subdivisions, attached townhomes and duplexes. |
| Multifamily/Mixed Residential | All areas where multilevel stacked residential product in the form of rental housing or condominium ownership is the predominant permitted use. Inclusive of high density multifamily and mixed-use developments. | Stacked flat apartment buildings, garden style apartment complexes, mid-rise multifamily podium projects, mid-rise multifamily podium projects with ground floor commercial uses, residential high-rise, residential condominium projects. |
| **Non-Residential** | | |
| Industrial | Industrial facilities inclusive of manufacturing, warehousing, distribution and light industrial and facilities | Heavy industrial and manufacturing, warehousing and logistics development, light industrial and flex industrial facilities. |
| Office | Areas where the predominant use is office and zoning caters to office heavy commercial uses | Business Parks, Downtown CBDs. |
| Retail | Areas designated for standalone retail development. | Malls, power centers, lifestyle centers. |
| Commercial (non-industrial) | Inclusive of all nonindustrial commercial uses. Appropriate to apply in mixed use areas where the commercial use is the predominant use inclusive of instances where mixed residential is allowed but commercial component is primary. | Retail and office development (stand alone of mixed).<br><br>Commercial components of residential mixed-use products. |

| **Step 2 :** Identify Regional Geographies mm and Market Factor Alignment | |
|---|---|
| **Explanation of step** | Use the following tables to identify the Regional Geography and to align with corresponding market conditions. |
| **Definitions and Reference** | • **Table 2A –** Metropolitan<br>• **Table 2B –** High-Capacity Transit Market Factor Alignment Table<br>• **Table 2C –** Core Cities Market Factor Alignment Table<br>• **Table 2D –** Cities and towns Market Alignment Table |

## Directions

### Regional Geography Designation

In addition to Product-type, this guidance segments different jurisdictions into like-kind Regional Geographies using the PSRC Designations. The four designations present in King County are given below:

- Metropolitan
- Core City
- High-Capacity Transit Community (HCT)
- Cities and Towns

Cities in these Regional Geographies share similar characteristics among peers. However, despite similarities amongst these Regional Geographies, market conditions still vary. To account for these variations amongst Regional Geographies peers, different *Market Factor Alignments* (high, medium, low) are be applied to the target cities to segment by these variations.

Use the Tables 2a -2d as a reference in selecting appropriate Market Factor Ranges by product type in Step 3. To review the Market Factor Indicators by City and Product type, refer to the **Appendix Tables A1-A4.** To review the methodology and explanation of Market Factor Indicators see Methodology Overview and Definitions section on page 8.

### Market Factor Alignment

Each city's market conditions have been evaluated and *Market Alignment* has been assigned by Product-type. Use the rankings to select a *Market Factors Range* in Step 3.

- **Low** – market data and test fit analysis indicated that a lower Market Factor range is appropriate for the given Product-type.
- **Medium** – market data and test fit analysis indicated that a mid level Market Factor range is appropriate for the given Product-type.
- **High** – market data and test fit analysis indicated that a higher Market Factor range is appropriate for the given Product-type.

Further adjustments to the Market Factor, including how to select within the recommended range are completed in **Step 4**.

## **Table 2A –** Metropolitan Market Alignment Table

| City/Regional Geography | | Product-Type Market Factor Alignment | | | |
|---|---|---|---|---|---|
| *City* | *PSRC Designation* | *Multifamily/MU* | *Single Family* | *Office/ Commercial* | *Industrial* |
| Bellevue | Metropolitan | Low | Low | Low | Low |
| Seattle* | Metropolitan | NA* | NA* | NA* | NA* |

**Reference Appendix (page 40) for City of Seattle specific Market Factor guidance.*

## **Table 2B –** Core Cities Market Factor Alignment Table

| City/Regional Geography | | Product-Type Market Factor Alignment | | | |
|---|---|---|---|---|---|
| *City* | *PSRC Designation* | *Multifamily/MU* | *Single Family* | *Office/Commercial* | *Industrial* |
| Redmond | Core City | Low | Low | Low | Medium |
| Tukwila | Core City | Low | Medium | Medium | Medium |
| Bothell | Core City | Low | Low | Low | Low |
| Issaquah | Core City | Medium | Low | Low | Low |
| Kirkland | Core City | Low | Medium | Low | Low |
| Kent | Core City | Medium | Low | High | Low |
| Burien | Core City | High | Medium | High | Low |
| SeaTac | Core City | High | Medium | Low | High |
| Federal Way | Core City | Low | Medium | Medium | Low |
| Renton | Core City | High | Low | Medium | Low |
| Auburn | Core City | Low | Medium | Medium | Low |

## **Table 2C–** High-Capacity Transit (HCT) Market Alignment Table

| City/Regional Geography | | Product-Type Market Factor Alignment | | | |
|---|---|---|---|---|---|
| *City* | *PSRC Designation* | *Multifamily/MU* | *Single Family* | *Office/ Commercial* | *Industrial* |
| Newcastle | HCT | Low | Medium | Low | High |
| Woodinville | HCT | Low | Low | Low | Low |
| Mercer Island | HCT | High | Low | Medium | Medium |
| Des Moines | HCT | High | Low | Low | Low |
| Shoreline | HCT | High | Medium | High | High |
| Kenmore | HCT | Low | Low | Medium | Medium |
| Lake Forest Park | HCT | High | Medium | High | NA |

**Table 2D –** Cities and towns Market Alignment Table

| City/Regional Geography | | Product-Type Market Factor Alignment | | | |
|---|---|---|---|---|---|
| *City* | *PSRC Designation* | *Multifamily/MU* | *Single Family* | *Office/ Commercial* | *Industrial* |
| North Bend | Cities and Towns | Medium | Low | Medium | High |
| Maple Valley | Cities and Towns | Low | Low | Medium | High |
| Snoqualmie | Cities and Towns | Low | Low | Medium | High |
| Covington | Cities and Towns | Medium | Low | Low | High |
| Enumclaw | Cities and Towns | High | Low | Medium | High |
| Sammamish | Cities and Towns | High | Low | High | High |
| Milton | Cities and Towns | High | High | High | High |
| Carnation | Cities and Towns | High | Low | Low | High |
| Duvall | Cities and Towns | High | Low | High | Low |
| Black Diamond | Cities and Towns | High | Medium | NA | High |
| Medina | Cities and Towns | High | Low | High | High |
| Normandy Park | Cities and Towns | Low | High | Medium | High |
| Pacific | Cities and Towns | High | Medium | High | High |
| Skykomish | Cities and Towns | High | Medium | High | High |
| Algona | Cities and Towns | High | Low | High | High |
| Beaux Arts | Cities and Towns | High | Low | NA | NA |
| Clyde Hill | Cities and Towns | High | Low | NA | NA |
| Hunts Point | Cities and Towns | High | Low | NA | NA |
| Yarrow Point | Cities and Towns | High | Low | NA | NA |

| **Step 3 :** Select From Market Factor Ranges | |
|---|---|
| **Explanation of step** | For each Product-type select a *Market Factor Range* suitable for your City |
| **Definitions and Reference** | • **Table 3A – Market Factor Ranges by Product-type** |

## Directions

Building upon Steps 1 and 2, Step 3 applies *Market Factor Ranges* by relating each Regional Geography and *Market Factor Alignment* (Step 2) to a specific Product-type which can then be applied to zoning through a given zoning designation's corresponding Product-type, which was identified in Step 1.

The following table contains *Market Factors Ranges* for all combinations of Regional Geographies, *Market factor Alignments, and* product-types.

## **Table 3A –** Market Factor Ranges by Product-Type

| | **Product-Type** | | | |
|---|---|---|---|---|
| **Regional Geography** | **Residential** | | **Non-Residential** | |
| *Market Factor Alignment* | **Multifamily/ Mixed-Res** | **Single Family** | **Commercial (Office/Retail/Mixed)** | **Industrial** |
| **Core City** | | | | |
| *Low* | 5%-10% | 1%-14% | 1%-10% | 1%-15% |
| *Medium* | 11%-20% | 15%-20% | 11%-20% | 16%-35% |
| *High* | 21%-35% | 21%-30% | 21%-50% | 36%-50% |
| **High-Capacity Transit** | | | | |
| Low | 5%-10% | 1%-9% | 1%-14% | 1%-19% |
| Medium | 11%-15% | 10%-20% | 15%-25% | 20%-30% |
| High | 16%-30% | 21%-35% | 26%-50% | 31%-50% |
| **Cities and Towns** | | | | |
| Low | 10%-24% | 1%-10% | 1%-10% | 1%-15% |
| Medium | 25%-35% | 11%-40% | 11%-20% | 16%-35% |
| High | 36%-50% | 41%-50% | 21%-50% | 36%-50% |
| **Metropolitan** | | | | |
| Low | 5%-10% | 1%-14% | 1%-10% | 1%-15% |

*Methodology Reminder:*
*These ranges are informed by the Market Factor Indictor test-fit analysis. This relates historical delivery trends to projected capacity. These ranges were then further differentiated among peers in each Regional Geography by evaluating price data including both rents and median sale price (for single family product). Reference Methodology Overview on Page 10 for more detail.*

| **Step 4 :** Adjustments | |
|---|---|
| **Explanation of step** | Make selected adjustments to suggested *Market Factor Ranges* based on known conditions |
| **Definitions and Reference** | • **Table 4A – Adjustment Implementation** |

## Overview

Step 4 provides a framework for selecting a Market Factor from within the range selected in Step 3. Specific conditions are discussed that would influence future development and impact the Market Factor value assumed by a given City.

The conditions listed below reflect specific topics and questions flagged during the engagement process described earlier in the guidance document. Each city should carefully consider these conditions and how they might impact their assumptions related to Market Factor. The conditions discussed do not represent all the potential conditions and issues that Market Factor may address. Cities should adjust within the given ranges or deviate from it altogether to account for known conditions that impact the development of and availability of land in their jurisdiction. **Table 4A** on the following pages provides more detailed descriptions of theses conditions and how adjustment should be considered. Note that assumptions previously incorporated into the Land Capacity Analysis (see page 15 *UGC Assumptions*) may already account for the adjustments discussed in this section.

- Vacant versus redevelopable lands assumptions
- Strong market growth indicators (Reference appendix market **Tables A5-A9**)
- Single family uses in recently up-zoned areas
- Restrictive Covenants in planned communities
- Parcel size and assemblage challenges
- Transit accessibility

## Selecting Within The Range Based on Market Conditions:

A range for each Product-type by each Regional Geography is provided in Step 3. In order to select within this range, each city must review their specific attributes, assumptions and market conditions and consider whether a higher or lower Market Factor is appropriate for that given Product-type (and therefore, applicable zone within the city). It is important to note that additional factors may need to be considered to account for unique circumstances influencing the market availability of land in any given jurisdiction.

Several sets of data may be leveraged to evaluate the adjustments outlined in **Table 4a**:

- **Appendix Tables A1-A4:** *Market Factor Indicators* and supporting data for each jurisdiction in King County (illustrating historical deliveries and planned capacity)
- **Appendix Tables A5-A9:** Market conditions by product-type (key indicators for all applicable jurisdictions within the County)
- **Appendix Table A10**: Past Market Factor assumptions

**Table 4A –** Adjustment Template

| Condition | Explanation | Recommendation on Market Factor Adjustment | |
|---|---|---|---|
| | | *Select a lower value from the range if:* | *Select a higher value from the range if:* |
| **Assumption for Vacant versus Redevelopable Lands** | | | |
| Where a City has a mix of vacant and redevelopable lands as part of their capacity and it is appropriate to differentiate the Market Factor assumption for vacant and redevelopable lands. | Consider the overall ratio of vacant land versus redevelopable land and the condition of said lands. For example, if >50% of capacity is on vacant land, consider adjusting Market Factor downward on vacant land upward on redevelopable land. The relative location of vacant and redevelopable lands is also an important consideration. Where redevelopable lands are located near or adjacent to important infrastructure and amenities, the need to differentiate between the two is less pronounced. | For vacant lands, select a value that is lower within the given range (or outside the low end of the range if deemed appropriate) when the supply of vacant lands represents a significant portion of overall capacity for a given product and the location and relative attributes of said supply do not represent barriers to redevelopment | For redevelopable lands, select a higher value in the Market Factor range if conditions are known that may limit or impact the turnover and availability of land with existing uses. |
| **Market Trends** | | | |
| Where recent real estate market trends for a given Product-type indicate more or less challenging conditions for development in the next 20 years. | If trends indicate growth in demand for a given product, consider a downward adjustment on Market Factor to reflect this demand. Such indicators include growth in pricing/lease rates and/or decreases. Alternatively, if the market data for a given product indicates more difficult market conditions in terms of ranking amongst jurisdictions, consider selection of a higher market factor within the given range. | Market trends align with trends amongst peer cities falling in a lower Market Factor Alignment indicates that a lower market factor may be appropriate. | Market trends suggest a downward trend in overall demand or overall rankings amongst peer cities suggesting that a higher market factor may be appropriate. |

**Table 4A –** Adjustment Template

| Condition | Explanation | Recommendation on Market Factor Adjustment | |
|---|---|---|---|
| | | *Select a lower value from the range if:* | *Select a higher value from the range if:* |
| **Single Family Up-zoned Areas** | | | |
| Where significant capacity for higher density single family or multifamily/ mixed-use housing is assumed on existing single family uses | Where capacity exists on lands that currently house single family uses but greater densities are permitted, many cities have cited concern regarding how such areas will redevelop and if a specific Market Factor adjustment should be leveraged. The Cities of Shoreline and SeaTac serve as examples where single family areas were up-zoned around planned or completed transit facilities. The turnover and development of single family areas in these cities is captured in through the analysis of historical deliveries data and may be leveraged for reference or comparison on a county wide scale.<br><br>Important indicators to consider when adjusting for such a condition include:<br>– Whether home prices are below, on par or above median prices in the region<br>– The age and quality of the housing stock<br>– Recent transaction activity<br>– Recent permitting activity | The conditions of the capacity lands with single family uses reflect the following conditions:<br>– Home prices at or below median prices for the area<br>– The housing stock is aging<br>– There is a higher rate of recent transactions reflecting interest from developers | The conditions of the capacity lands with single family uses reflect the following conditions:<br>– Home prices are above median prices for the area representing a potential market barrier to redevelopment<br>– The housing stock includes recently constructed or updated structures<br>– Recent transactions reflect value in use (meaning the highest and best use of the property is still considered the single family residence) |
| **Restrictive Covenants in Planned Communities** | | | |
| Where restrictive home-owner associations or other similar covenants may limit the redevelopment at a higher intensity/use | In some cases, areas that have been rezoned or up-zoned are still subject to restrictive covenants that run with the land and limit how development may occur. This is most likely to exist in existing single family neighborhoods but may also pose a challenge in business parks and other similar commercial districts. | If restrictive covenants are not known to exist or would have a limited impact on redevelopment in the future. | If restrictive covenants are known and would need to be removed/eliminated in order for redevelopment per new zoning allowances to occur (at a higher intensity). |
| | | | |

**Table 4A –** Adjustment Template (Continued)

| Condition | Explanation | Recommendation on Market Factor Adjustment | |
|---|---|---|---|
| | | *Select a lower value from the range if:* | *Select a higher value from the range if:* |
| **Fragmented Ownership and Parcel Size** | | | |
| Where capacity in a given neighborhood or zone is fragmented and generally consists of smaller parcels (less than ..25 acres for multifamily site for example) | Where capacity for a given Product-type occurs on largely fragmented or non-contiguous parcels and the parcels are generally smaller in size, a higher market factor may be considered. Such conditions may limit options for parcel assemblage in the future and result in less land being redeveloped in the future. | Vacant and/or redevelopable lands consist of a mix of contiguous and non-contiguous properties and parcel sizes do not appear to represent a challenge to development in the future | Conditions are observed that reflect an abundance of capacity on smaller, non-contiguous properties in a given zone or neighborhood |
| **Access to Transit** | | | |
| Where planned or recently completed transit facilities may impact develop feasibility in the surrounding neighborhood/zone. | Planned infrastructure like Bus Rapid Transit, Light Rail and other major transportation improvement that improve access and mobility can greatly improve development feasibility and owner willingness to sell/redevelopment land. Market Factor assumptions should reflect where such improvements either exist or are planned in the future (within an impacted area such as a ¼ mile walk shed). | A significant transportation infrastructure investment is completed or planned that will greatly improve transit access in a given zone or neighborhood. | NA |
| | | | |

# 3. Appendix A – Reference Tables

## Appendix Tables Summary

The following tables are available for reference and were used to inform the Market Factor alignment for Cities (low, medium or high) by product and the Market Factor range value.

- **Table A1. Supply, Deliveries, & Capacity Table:** *Multifamily + Mixed Res*
- **Table A2. Supply, Deliveries, & Capacity Table:** *Single Family*
- **Table A3. Supply, Deliveries, & Capacity Table:** Non-residential - *Commercial (Office/Retail)*
- **Table A4. Supply, Deliveries, & Capacity Table:** *Non-Residential - Industrial*

Additional Market data is available in the following tables to further inform Market Factor selection and adjustments. Included is an overview of past Market Factor assumptions used across Washington State.

- **Table A5. Market Data – Multifamily Residential Product**
- **Table A6. Market Data – Single Family Product**
- **Table A7. Market Data – Retail Product**
- **Table A8. Market Data – Office Product**
- **Table A9. Market Data – Industrial Product**
- **Table A10. Market Factor – Past Assumptions**

## Table A1. Supply, Deliveries, & Capacity Table:

*Multifamily + Mixed Res*

| City | Regional Geography | Market Factor Alignment | Total Supply (Units) | 5-yr Average Annual Deliveries (Gross,2015-2019) | Assumed Capacity Estimates from Cities (Gross) | Market Factor Indicator |
|---|---|---|---|---|---|---|
| **Algona** | **Cities and Towns** | High | 36 | 0 | 53 | 100% |
| **Beaux Arts** | **Cities and Towns** | High | 0 | 0 | 0 | 100% |
| **Black Diamond** | **Cities and Towns** | High | 41 | 0 | 1886 | 100% |
| **Carnation** | **Cities and Towns** | High | 45 | 0 | 196 | 100% |
| **Clyde Hill** | **Cities and Towns** | High | 0 | 0 | 0 | 100% |
| **Duvall** | **Cities and Towns** | High | 119 | 0 | 856 | 100% |
| **Enumclaw** | **Cities and Towns** | High | 1,053 | 0 | 632 | 100% |
| **Hunts Point** | **Cities and Towns** | High | 0 | 0 | 0 | 100% |
| **Medina** | **Cities and Towns** | High | 0 | 0 | 0 | 100% |
| **Milton** | **Cities and Towns** | High | 300 | 23 | 0 | 100% |
| **Pacific** | **Cities and Towns** | High | 599 | 0 | 3 | 100% |
| **Skykomish** | **Cities and Towns** | High | 0 | 0 | 0 | 100% |
| **Yarrow Point** | **Cities and Towns** | High | 0 | 0 | 0 | 100% |
| **Sammamish** | **Cities and Towns** | High | 3,021 | 25 | 2157 | 76% |
| **North Bend** | **Cities and Towns** | Med | 803 | 9 | 390 | 56% |
| **Covington** | **Cities and Towns** | Med | 665 | 65 | 1689 | 23% |
| **Maple Valley** | **Cities and Towns** | Low | 1,121 | 65 | 269 | 0% |
| **Normandy Park** | **Cities and Towns** | Low | 584 | 1 | 12 | 0% |
| **Snoqualmie** | **Cities and Towns** | Low | 944 | 58 | 148 | 0% |
| **SeaTac** | **Core City** | High | 4,626 | 41 | 7044 | 88% |
| **Renton** | **Core City** | High | 17,274 | 153 | 15476 | 80% |
| **Burien** | **Core City** | High | 7,635 | 120 | 7624 | 68% |
| **Kent** | **Core City** | Med | 21,166 | 278 | 13077 | 57% |
| **Issaquah** | **Core City** | Med | 10,277 | 426 | 14172 | 40% |
| **Kirkland** | **Core City** | Low | 18,348 | 427 | 9327 | 8% |
| **Tukwila** | **Core City** | Low | 4,484 | 126 | 2551 | 1% |
| **Auburn** | **Core City** | Low | 8,481 | 201 | 3511 | 0% |
| **Bothell** | **Core City** | Low | 6,168 | 350 | 3238 | 0% |
| **Federal Way** | **Core City** | Low | 16,085 | 192 | 617 | 0% |
| **Redmond** | **Core City** | Low | 19,531 | 1,144 | 20414 | 0% |
| **Lake Forest Park** | **High Capacity Transit Community** | High | 786 | 0 | 844 | 100% |
| **Shoreline** | **High Capacity Transit Community** | High | 7,568 | 208 | 24037 | 83% |
| **Des Moines** | **High Capacity Transit Community** | High | 5,348 | 106 | 6657 | 68% |
| **Mercer Island** | **High Capacity Transit Community** | High | 3,352 | 78 | 4748 | 67% |
| **Kenmore** | **High Capacity Transit Community** | Low | 2,335 | 53 | 1147 | 7% |
| **Woodinville** | **High Capacity Transit Community** | Low | 2,996 | 126 | 2612 | 4% |
| **Newcastle** | **High Capacity Transit Community** | Low | 2,330 | 202 | 2772 | 0% |
| **Bellevue** | **Metropolitan** | Low | 30,707 | 993 | 23473 | 15% |

*Source: King County Assessor*

## Table A2. Supply, Deliveries, & Capacity Table:

*Single Family*

| City | Regional Geography | Market Factor Alignment | Total Supply (Units) | 5-yr Average Annual Deliveries (Gross,2015-2019) | Assumed Capacity Estimates from Cities (Gross) | Market Factor Indicator Value |
|---|---|---|---|---|---|---|
| **Milton** | **Cities and Towns** | High | 370 | 0 | 70 | 100% |
| **Normandy Park** | **Cities and Towns** | High | 2,279 | 9 | 4931 | 96% |
| **Skykomish** | **Cities and Towns** | Medium | 136 | 0 | 54 | 85% |
| **Black Diamond** | **Cities and Towns** | Medium | 1,442 | 16 | 1606 | 80% |
| **Pacific** | **Cities and Towns** | Medium | 1,722 | 12 | 586 | 58% |
| **Algona** | **Cities and Towns** | Low | 847 | 5 | 59 | 0% |
| **Beaux Arts** | **Cities and Towns** | Low | 116 | 0 | 3 | 0% |
| **Carnation** | **Cities and Towns** | Low | 725 | 33 | 110 | 0% |
| **Clyde Hill** | **Cities and Towns** | Low | 1,100 | 16 | 0 | 0% |
| **Covington** | **Cities and Towns** | Low | 6,195 | 52 | 295 | 0% |
| **Duvall** | **Cities and Towns** | Low | 2,411 | 34 | 446 | 0% |
| **Enumclaw** | **Cities and Towns** | Low | 3,867 | 92 | 1078 | 0% |
| **Hunts Point** | **Cities and Towns** | Low | 181 | 0 | 5 | 0% |
| **Maple Valley** | **Cities and Towns** | Low | 8,204 | 87 | 1314 | 0% |
| **Medina** | **Cities and Towns** | Low | 1,147 | 9 | 60 | 0% |
| **North Bend** | **Cities and Towns** | Low | 2,028 | 64 | 893 | 0% |
| **Sammamish** | **Cities and Towns** | Low | 18,960 | 257 | 994 | 0% |
| **Snoqualmie** | **Cities and Towns** | Low | 3,804 | 55 | 54 | 0% |
| **Yarrow Point** | **Cities and Towns** | Low | 411 | 7 | 24 | 0% |
| **Burien** | **Core City** | Medium | 12,813 | 58 | 8034 | 85% |
| **SeaTac** | **Core City** | Medium | 5,489 | 20 | 1757 | 78% |
| **Federal Way** | **Core City** | Medium | 20,058 | 50 | 4082 | 75% |
| **Tukwila** | **Core City** | Medium | 3,677 | 31 | 1914 | 67% |
| **Auburn** | **Core City** | Medium | 15,664 | 152 | 6859 | 56% |
| **Kirkland** | **Core City** | Medium | 22,231 | 246 | 6019 | 18% |
| **Bothell** | **Core City** | Low | 5,472 | 77 | 1065 | 0% |
| **Issaquah** | **Core City** | Low | 7,319 | 102 | 1321 | 0% |
| **Kent** | **Core City** | Low | 24,572 | 224 | 3174 | 0% |
| **Redmond** | **Core City** | Low | 11,947 | 148 | 153 | 0% |
| **Renton** | **Core City** | Low | 23,217 | 169 | 2887 | 0% |
| **Shoreline** | **High Capacity Transit Community** | Medium | 16,241 | 51 | 1926 | 47% |
| **Newcastle** | **High Capacity Transit Community** | Medium | 3,267 | 29 | 942 | 38% |
| **Lake Forest Park** | **High Capacity Transit Community** | Medium | 4,605 | 36 | 1084 | 34% |
| **Des Moines** | **High Capacity Transit Community** | Low | 7,770 | 45 | 549 | 0% |
| **Kenmore** | **High Capacity Transit Community** | Low | 6,725 | 86 | 307 | 0% |
| **Mercer Island** | **High Capacity Transit Community** | Low | 7,200 | 65 | 942 | 0% |
| **Woodinville** | **High Capacity Transit Community** | Low | 2,945 | 51 | 159 | 0% |
| **Bellevue** | **Metropolitan** | Low | 30,991 | 180 | 1401 | 0% |

*Source: King County Assessor*

## Table A3. Supply, Deliveries, & Capacity Table:

Non-residential - *Commercial (Office/Retail/Mixed-use)*

| City | Regional Geography | Market Factor Alignment | Total Supply (square feet) | 5-yr Average Annual Deliveries (Gross,2015-2019) | Assumed Capacity Estimates from Cities (Gross) | Market Factor Indicator Value |
|---|---|---|---|---|---|---|
| **Algona** | **Cities and Towns** | High | 82,157 | 0 | 1,937,549 | 100% |
| **Beaux Arts** | **Cities and Towns** | High | 0 | 0 | 0 | 100% |
| **Black Diamond** | **Cities and Towns** | High | 112,398 | 24 | 0 | 100% |
| **Carnation** | **Cities and Towns** | Low | 107,218 | 3,173 | 45,869 | 0% |
| **Clyde Hill** | **Cities and Towns** | High | 3,943 | 0 | 0 | 100% |
| **Covington** | **Cities and Towns** | Low | 1,600,545 | 17,681 | 21,500 | 0% |
| **Duvall** | **Cities and Towns** | High | 329,706 | 0 | 0 | 100% |
| **Enumclaw** | **Cities and Towns** | Med | 1,069,481 | 8,426 | 510,812 | 67% |
| **Hunts Point** | **Cities and Towns** | High | 0 | 0 | 0 | 100% |
| **Maple Valley** | **Cities and Towns** | Med | 1,000,677 | 6,225 | 3,034,746 | 96% |
| **Medina** | **Cities and Towns** | High | 17,769 | 0 | 1,466 | 100% |
| **Milton** | **Cities and Towns** | High | 0 | 0 | 453,024 | 100% |
| **Normandy Park** | **Cities and Towns** | Med | 220,497 | 912 | 1,364,473 | 99% |
| **North Bend** | **Cities and Towns** | Med | 815,721 | 5,093 | 1,816,293 | 94% |
| **Pacific** | **Cities and Towns** | High | 44,398 | 0 | 986,895 | 100% |
| **Sammamish** | **Cities and Towns** | High | 701,175 | 22,701 | 0 | 100% |
| **Skykomish** | **Cities and Towns** | High | 17,793 | 0 | 0 | 100% |
| **Snoqualmie** | **Cities and Towns** | Med | 861,700 | 15,282 | 589,806 | 48% |
| **Yarrow Point** | **Cities and Towns** | High | 0 | 0 | 0 | 100% |
| **Auburn** | **Core City** | Med | 6,044,887 | 29,832 | 3,117,316 | 81% |
| **Bothell** | **Core City** | Low | 2,668,767 | 12,787 | 49,675 | 0% |
| **Burien** | **Core City** | High | 3,154,588 | 25,970 | 0 | 100% |
| **Federal Way** | **Core City** | Med | 9,915,400 | 40,014 | 2,297,392 | 65% |
| **Issaquah** | **Core City** | Low | 6,213,142 | 15,918 | 22,297 | 0% |
| **Kent** | **Core City** | High | 8,619,483 | 69,824 | 0 | 100% |
| **Kirkland** | **Core City** | Low | 8,423,096 | 229,860 | 2,042,751 | 0% |
| **Redmond** | **Core City** | Low | 17,730,711 | 124,991 | 0 | 100% |
| **Renton** | **Core City** | High | 14,388,628 | 329,953 | 0 | 100% |
| **SeaTac** | **Core City** | Low | 4,465,866 | 38,001 | 114,580 | 0% |
| **Tukwila** | **Core City** | Med | 10,102,478 | 10,163 | 1,847,445 | 89% |
| **Des Moines** | **High Capacity Transit Community** | Low | 1,192,091 | 65,619 | 1,081,548 | 0% |
| **Kenmore** | **High Capacity Transit Community** | High | 599,267 | 8,177 | 0 | 100% |
| **Lake Forest Park** | **High Capacity Transit Community** | High | 346,900 | 0 | 65,635 | 100% |
| **Mercer Island** | **High Capacity Transit Community** | Med | 1,072,265 | 2,133 | 125,344 | 66% |
| **Newcastle** | **High Capacity Transit Community** | Low | 309,937 | 7,889 | 12,170 | 0% |
| **Shoreline** | **High Capacity Transit Community** | High | 3,240,969 | 5,866 | 0 | 100% |
| **Woodinville** | **High Capacity Transit Community** | Low | 1,692,157 | 11,304 | 6,614 | 0% |
| **Bellevue** | **Metropolitan** | Low | 35,827,922 | 684,660 | 1,828,205 | 0% |

*Source: King County Assessor*

*Note: Capacity does not reflect the assumed capacity projected in mixed-use development

## Table A4. Supply, Deliveries, & Capacity Table:

*Non-Residential - Industrial*

| City | Regional Geography | Market Factor Alignment | Total Supply (square feet) | 5-yr Average Annual Deliveries (Gross,2015-2019) | Assumed Capacity Estimates from Cities (Gross) | Market Factor Indicator Value |
|---|---|---|---|---|---|---|
| Algona | Cities and Towns | High | 2,436,435 | 0 | 308056 | 100% |
| Beaux Arts | Cities and Towns | High | 0 | 0 | 0 | 100% |
| Black Diamond | Cities and Towns | High | 71,790 | 3,520 | 0 | 100% |
| Carnation | Cities and Towns | High | 161,286 | 0 | 21321 | 100% |
| Clyde Hill | Cities and Towns | High | 2,430 | 0 | 0 | 100% |
| Covington | Cities and Towns | High | 350,018 | 40,329 | 0 | 100% |
| Hunts Point | Cities and Towns | High | 0 | 0 | 0 | 100% |
| Maple Valley | Cities and Towns | High | 321,719 | 0 | 0 | 100% |
| Medina | Cities and Towns | High | 16,283 | 0 | 0 | 100% |
| Milton | Cities and Towns | High | 1,300 | 0 | 0 | 100% |
| Normandy Park | Cities and Towns | High | 47,284 | 0 | 0 | 100% |
| North Bend | Cities and Towns | High | 852,090 | 0 | 0 | 100% |
| Pacific | Cities and Towns | High | 254,978 | 0 | 1931973 | 100% |
| Sammamish | Cities and Towns | High | 163,595 | 0 | 0 | 100% |
| Skykomish | Cities and Towns | High | 12,385 | 0 | 0 | 100% |
| Yarrow Point | Cities and Towns | High | 0 | 0 | 0 | 100% |
| Snoqualmie | Cities and Towns | High | 1,083,332 | 6,982 | 9893940 | 99% |
| Enumclaw | Cities and Towns | High | 1,028,576 | 15,684 | 2248545 | 86% |
| Duvall | Cities and Towns | Low | 164,303 | 17,881 | 125140 | 0% |
| Bothell | Core City | High | 1,891,744 | 25,976 | 0 | 100% |
| Kirkland | Core City | High | 3,759,313 | 17,595 | 0 | 100% |
| Renton | Core City | High | 13,611,660 | 175,518 | 0 | 100% |
| SeaTac | Core City | High | 4,256,960 | 91,460 | 0 | 100% |
| Tukwila | Core City | Med | 14,963,571 | 34,945 | 3397732 | 79% |
| Redmond | Core City | Med | 10,139,556 | 19,167 | 1043760 | 63% |
| Auburn | Core City | Low | 23,959,569 | 184,213 | 3092704 | 0% |
| Burien | Core City | Low | 1,811,122 | 141,140 | 272973 | 0% |
| Federal Way | Core City | Low | 2,732,946 | 88,774 | 1651415 | 0% |
| Issaquah | Core City | Low | 1,421,025 | 17,721 | 327789 | 0% |
| Kent | Core City | Low | 46,653,264 | 492,318 | 7856045 | 0% |
| Kenmore | High Capacity Transit Community | High | 536,730 | 2,880 | 0 | 100% |
| Lake Forest Park | High Capacity Transit Community | High | 14,757 | 0 | 0 | 100% |
| Mercer Island | High Capacity Transit Community | High | 96,230 | 0 | 0 | 100% |
| Newcastle | High Capacity Transit Community | High | 227,320 | 0 | 0 | 100% |
| Shoreline | High Capacity Transit Community | High | 1,447,694 | 76,424 | 0 | 100% |
| Des Moines | High Capacity Transit Community | Low | 1,892,369 | 311,055 | 7619 | 0% |
| Woodinville | High Capacity Transit Community | Low | 5,868,390 | 50,850 | 371356 | 0% |
| Bellevue | Metropolitan | Low | 4,853,067 | 32,740 | 143435 | 0% |

*Source: King County Assessor*

## Table A5. Market Data – Multifamily Residential Product

| CITY | Total Product Supply | Total Housing Supply | Product % of total Housing units | Total Unit Deliveries 2000-2019 | Average Annual Deliveries 2000-2019 (Units) | Total Deliveries last 5 years (gross, units) | Average Annual Deliveries last 5 years (Gross, Units) | 5-yr. Total Deliveries as a % of 20-year Total Deliveries (Gross) | Current average rent, (Monthly $/SF ) | Average Rent 2015, (Monthly $/SF ) | Average Rent 2010, (Monthly $/SF ) |
|---|---|---|---|---|---|---|---|---|---|---|---|
| ALGONA | 36 | 884 | 4.1% | 0 | 0 | 0 | 0 | 0.0% | $1.53 | $1.25 | $1.02 |
| AUBURN | 8,481 | 24,155 | 35.1% | 2,055 | 103 | 1,003 | 201 | 9.8% | $1.53 | $1.25 | $1.02 |
| BEAUX ARTS | 0 | 116 | 0.0% | 0 | 0 | 0 | 0 | 0.0% | $2.60 | $2.30 | $1.83 |
| BELLEVUE | 30,707 | 61,914 | 49.6% | 10,231 | 512 | 4,964 | 993 | 9.7% | $2.60 | $2.30 | $1.83 |
| BLACK DIAMOND | 41 | 1,828 | 2.2% | 0 | 0 | 0 | 0 | 0.0% | $1.90 | $1.61 | $1.27 |
| BOTHELL | 6,168 | 11,742 | 52.5% | 2,841 | 142 | 1,750 | 350 | 12.3% | $2.02 | $1.71 | $1.37 |
| BURIEN | 7,635 | 20,456 | 37.3% | 1,124 | 56 | 602 | 120 | 10.7% | $1.69 | $1.39 | $1.07 |
| CARNATION | 45 | 779 | 5.8% | 0 | 0 | 0 | 0 | 0.0% | $1.90 | $1.61 | $1.27 |
| CLYDE HILL | 0 | 1,100 | 0.0% | 0 | 0 | 0 | 0 | 0.0% | $2.60 | $2.30 | $1.83 |
| COVINGTON | 665 | 6,870 | 9.7% | 665 | 33 | 326 | 65 | 9.8% | $1.90 | $1.61 | $1.27 |
| DES MOINES | 5,348 | 13,218 | 40.5% | 772 | 39 | 532 | 106 | 13.8% | $1.69 | $1.39 | $1.07 |
| DUVALL | 119 | 2,557 | 4.7% | 93 | 5 | 0 | 0 | 0.0% | $1.90 | $1.61 | $1.27 |
| ENUMCLAW | 1,053 | 4,928 | 21.4% | 73 | 4 | 0 | 0 | 0.0% | $1.90 | $1.61 | $1.27 |
| FEDERAL WAY | 16,085 | 36,149 | 44.5% | 2,357 | 118 | 962 | 192 | 8.2% | $1.61 | $1.33 | $1.00 |
| HUNTS POINT | 0 | 181 | 0.0% | 0 | 0 | 0 | 0 | 0.0% | $2.60 | $2.30 | $1.83 |
| ISSAQUAH | 10,277 | 17,600 | 58.4% | 5,744 | 287 | 2,129 | 426 | 7.4% | $2.08 | $1.82 | $1.40 |
| KENMORE | 2,335 | 9,153 | 25.5% | 521 | 26 | 267 | 53 | 10.2% | $2.02 | $1.71 | $1.37 |
| KENT | 21,166 | 45,764 | 46.3% | 3,066 | 153 | 1,390 | 278 | 9.1% | $1.76 | $1.42 | $1.09 |
| KIRKLAND | 18,348 | 40,736 | 45.0% | 5,394 | 270 | 2,135 | 427 | 7.9% | $2.41 | $2.07 | $1.58 |
| LAKE FOREST PARK | 786 | 5,395 | 14.6% | 1 | 0 | 0 | 0 | 0.0% | $2.02 | $1.71 | $1.37 |
| MAPLE VALLEY | 1,121 | 9,332 | 12.0% | 614 | 31 | 326 | 65 | 10.6% | $1.90 | $1.61 | $1.27 |
| MEDINA | 0 | 1,148 | 0.0% | 0 | 0 | 0 | 0 | 0.0% | $2.60 | $2.30 | $1.83 |
| MERCER ISLAND | 3,352 | 10,556 | 31.8% | 1,983 | 99 | 389 | 78 | 3.9% | $2.60 | $2.30 | $1.83 |
| MILTON | 300 | 670 | 44.8% | 300 | 15 | 116 | 23 | 7.7% | $0.00 | $0.00 | $0.00 |
| NEWCASTLE | 2,330 | 5,707 | 40.8% | 1,444 | 72 | 1,009 | 202 | 14.0% | $2.08 | $1.82 | $1.40 |
| NORMANDY PARK | 584 | 2,864 | 20.4% | 118 | 6 | 6 | 1 | 1.0% | $1.69 | $1.39 | $1.07 |
| NORTH BEND | 803 | 2,845 | 28.2% | 308 | 15 | 43 | 9 | 2.8% | $1.90 | $1.61 | $1.27 |
| PACIFIC | 599 | 2,321 | 25.8% | 79 | 4 | 0 | 0 | 0.0% | $1.53 | $1.25 | $1.02 |
| REDMOND | 19,531 | 31,587 | 61.8% | 8,571 | 429 | 5,722 | 1,144 | 13.4% | $2.39 | $2.12 | $1.69 |
| RENTON | 17,274 | 40,576 | 42.6% | 4,771 | 239 | 763 | 153 | 3.2% | $1.88 | $1.56 | $1.23 |
| SAMMAMISH | 3,021 | 21,989 | 13.7% | 1,310 | 66 | 127 | 25 | 1.9% | $1.90 | $1.61 | $1.27 |
| SeaTac | 4,626 | 10,115 | 45.7% | 1,213 | 61 | 207 | 41 | 3.4% | $1.69 | $1.39 | $1.07 |
| SEATTLE | 191,061 | 362,153 | 52.8% | 82,778 | 4,139 | 46,027 | 9,205 | 11.1% | $0.00 | $0.00 | $0.00 |
| SHORELINE | 7,568 | 23,906 | 31.7% | 2,053 | 103 | 1,042 | 208 | 10.2% | $2.05 | $1.78 | $1.52 |
| SKYKOMISH | 0 | 137 | 0.0% | 0 | 0 | 0 | 0 | 0.0% | $1.90 | $1.61 | $1.27 |
| SNOQUALMIE | 944 | 4,748 | 19.9% | 836 | 42 | 291 | 58 | 7.0% | $1.90 | $1.61 | $1.27 |
| TUKWILA | 4,484 | 8,298 | 54.0% | 629 | 31 | 629 | 126 | 20.0% | $1.88 | $1.56 | $1.23 |
| WOODINVILLE | 2,996 | 6,208 | 48.3% | 1,455 | 73 | 630 | 126 | 8.7% | $2.02 | $1.71 | $1.37 |
| YARROW POINT | 0 | 413 | 0.0% | 0 | 0 | 0 | 0 | 0.0% | $2.60 | $2.30 | $1.83 |

Note: all deliveries are gross and measured in units

*Source: King County Assessor, Costar*

## Table A6. Market Data – Single Family Product

| CITY | Total Product Supply | Total Housing Supply | Product % of total Housing units | Total Unit Deliveries 2000-2019 | Average Annual Deliveries 2000-2019 (Units) | Total Deliveries last 5 years (gross, units) | Average Annual Deliveries last 5 years (Gross, Units) | 5-yr. Total Deliveries as a % of 20-year Total Deliveries (Gross) | Median Sale Price 2020 | Median Sale Price 2015 | Median Sale Price 2012 | 6-year CAGR | 9- year CAGR |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| ALGONA | 847 | 884 | 95.8% | 223 | 11 | 25 | 5 | 11% | $371,000 | $234,000 | $140,000 | 8.0% | 11.4% |
| AUBURN | 15,664 | 24,155 | 64.8% | 3,545 | 177 | 759 | 152 | 21% | $493,000 | $302,000 | $220,000 | 8.5% | 9.4% |
| BEAUX ARTS | 116 | 116 | 100.0% | 17 | 1 | 2 | 0 | 12% | $2,530,000 | $1,167,000 | $660,000 | 13.8% | 16.1% |
| BELLEVUE | 30,991 | 61,914 | 50.1% | 3,458 | 173 | 900 | 180 | 26% | $1,098,000 | $680,000 | $507,000 | 8.3% | 9.0% |
| BLACK DIAMOND | 1,442 | 1,828 | 78.9% | 216 | 11 | 82 | 16 | 38% | $519,000 | $310,000 | $321,000 | 9.0% | 5.5% |
| BOTHELL | 5,472 | 11,742 | 46.6% | 1,339 | 67 | 387 | 77 | 29% | $710,000 | $449,000 | $335,000 | 7.9% | 8.7% |
| BURIEN | 12,813 | 20,456 | 62.6% | 1,050 | 53 | 292 | 58 | 28% | $518,000 | $288,000 | $192,000 | 10.3% | 11.7% |
| CARNATION | 725 | 779 | 93.1% | 178 | 9 | 164 | 33 | 92% | $820,000 | $352,000 | $350,000 | 15.1% | 9.9% |
| CLYDE HILL | 1,100 | 1,100 | 100.0% | 262 | 13 | 81 | 16 | 31% | $2,525,000 | $2,000,000 | $3,130,000 | 4.0% | -2.4% |
| COVINGTON | 6,195 | 6,870 | 90.2% | 1,880 | 94 | 262 | 52 | 14% | $536,000 | $323,000 | $255,000 | 8.8% | 8.6% |
| DES MOINES | 7,770 | 13,218 | 58.8% | 685 | 34 | 224 | 45 | 33% | $467,000 | $297,000 | $186,000 | 7.8% | 10.8% |
| DUVALL | 2,411 | 2,557 | 94.3% | 947 | 47 | 171 | 34 | 18% | $687,000 | $497,000 | $320,000 | 5.5% | 8.9% |
| ENUMCLAW | 3,867 | 4,928 | 78.5% | 709 | 35 | 462 | 92 | 65% | $542,000 | $319,000 | $277,000 | 9.2% | 7.7% |
| FEDERAL WAY | 20,058 | 36,149 | 55.5% | 1,814 | 91 | 250 | 50 | 14% | $450,000 | $275,000 | $210,000 | 8.6% | 8.8% |
| HUNTS POINT | 181 | 181 | 100.0% | 41 | 2 | 2 | 0 | 5% | $3,900,000 | $1,450,000 | $6,900,000 | 17.9% | -6.1% |
| ISSAQUAH | 7,319 | 17,600 | 41.6% | 3,758 | 188 | 508 | 102 | 14% | $810,000 | $500,000 | $455,000 | 8.4% | 6.6% |
| KENMORE | 6,725 | 9,153 | 73.5% | 1,767 | 88 | 430 | 86 | 24% | $730,000 | $506,000 | $352,000 | 6.3% | 8.4% |
| KENT | 24,572 | 45,764 | 53.7% | 5,281 | 264 | 1,118 | 224 | 21% | $493,000 | $316,000 | $214,000 | 7.7% | 9.7% |
| KIRKLAND | 22,231 | 40,736 | 54.6% | 3,955 | 198 | 1,230 | 246 | 31% | $865,000 | $530,000 | $407,000 | 8.5% | 8.7% |
| LAKE FOREST PARK | 4,605 | 5,395 | 85.4% | 387 | 19 | 178 | 36 | 46% | $803,000 | $400,000 | $395,000 | 12.3% | 8.2% |
| MAPLE VALLEY | 8,204 | 9,332 | 87.9% | 3,945 | 197 | 436 | 87 | 11% | $575,000 | $383,000 | $290,000 | 7.0% | 7.9% |
| MEDINA | 1,147 | 1,148 | 99.9% | 250 | 13 | 47 | 9 | 19% | $4,325,000 | $2,884,000 | $925,000 | 7.0% | 18.7% |
| MERCER ISLAND | 7,200 | 10,556 | 68.2% | 1,037 | 52 | 327 | 65 | 32% | $1,550,000 | $1,090,000 | $986,000 | 6.0% | 5.2% |
| MILTON | 370 | 670 | 55.2% | 26 | 1 | 0 | 0 | 0% | $460,000 | $246,000 | $139,000 | 11.0% | 14.2% |
| NEWCASTLE | 3,267 | 5,707 | 57.2% | 1,003 | 50 | 147 | 29 | 15% | $968,000 | $605,000 | $465,000 | 8.1% | 8.5% |
| NORMANDY PARK | 2,279 | 2,864 | 79.6% | 152 | 8 | 44 | 9 | 29% | $875,000 | $555,000 | $425,000 | 7.9% | 8.4% |
| NORTH BEND | 2,028 | 2,845 | 71.3% | 599 | 30 | 322 | 64 | 54% | $850,000 | $439,000 | $364,000 | 11.6% | 9.9% |
| PACIFIC | 1,722 | 2,321 | 74.2% | 468 | 23 | 61 | 12 | 13% | $415,000 | $242,000 | $217,000 | 9.4% | 7.5% |
| REDMOND | 11,947 | 31,587 | 37.8% | 3,089 | 154 | 738 | 148 | 24% | $834,000 | $570,000 | $450,000 | 6.5% | 7.1% |
| RENTON | 23,217 | 40,576 | 57.2% | 7,141 | 357 | 847 | 169 | 12% | $566,000 | $350,000 | $295,000 | 8.3% | 7.5% |
| SAMMAMISH | 18,960 | 21,989 | 86.2% | 5,746 | 287 | 1,285 | 257 | 22% | $1,099,000 | $699,000 | $507,000 | 7.8% | 9.0% |
| SeaTac | 5,489 | 10,115 | 54.3% | 409 | 20 | 98 | 20 | 24% | $440,000 | $262,000 | $188,000 | 9.0% | 9.9% |
| SEATTLE | 167,142 | 362,153 | 46.2% | 26,954 | 1,348 | 8,165 | 1,633 | 30% | $745,000 | $494,000 | $368,000 | 7.1% | 8.2% |
| SHORELINE | 16,241 | 23,906 | 67.9% | 1,023 | 51 | 253 | 51 | 25% | $650,000 | $388,000 | $287,000 | 9.0% | 9.5% |
| SKYKOMISH | 136 | 137 | 99.3% | 8 | 0 | 2 | 0 | 25% | $455,000 | $108,000 | $155,000 | 27.1% | 12.7% |
| SNOQUALMIE | 3,804 | 4,748 | 80.1% | 3,030 | 152 | 274 | 55 | 9% | $845,000 | $462,000 | $396,000 | 10.6% | 8.8% |
| TUKWILA | 3,677 | 8,298 | 44.3% | 619 | 31 | 156 | 31 | 25% | $485,000 | $303,000 | $225,000 | 8.2% | 8.9% |
| WOODINVILLE | 2,945 | 6,208 | 47.4% | 780 | 39 | 253 | 51 | 32% | $925,000 | $517,000 | $430,000 | 10.2% | 8.9% |
| YARROW POINT | 411 | 413 | 99.5% | 118 | 6 | 33 | 7 | 28% | $3,765,000 | $3,260,000 | $1,438,000 | 2.4% | 11.3% |

Note: all deliveries are gross and measured in units

*Source: King County Assessor, Redfin*

## Table A7. Market Data – Retail Product

| CITY | total Product supply (sf) | Total Deliveries 2000-2019 (SF) | Average Annual Deliveries 2000-2019 (SF) | 5-yr Total Deliveries last (gross, sf) | 5-Yr Average Annual Deliveries (Gross, sf) | 5-yr. Total Deliveries as a % of 20-year Total Deliveries (Gross) | Current average rent, (Annual, $/SF) |
|---|---|---|---|---|---|---|---|
| ALGONA | 21,931 | 7,828 | 391 | 0 | 0 | 0.0% | $22.84 |
| AUBURN | 4,059,789 | 963,901 | 48,195 | 58,083 | 11,617 | 1.2% | $22.84 |
| BEAUX ARTS | 0 | 0 | 0 | 0 | 0 | 0.0% | $42.34 |
| BELLEVUE | 9,281,934 | 2,835,369 | 141,768 | 845,558 | 169,112 | 6.0% | $0.00 |
| BLACK DIAMOND | 70,583 | 15,023 | 751 | 120 | 24 | 0.2% | $25.09 |
| BOTHELL | 645,440 | 200,487 | 10,024 | 38,065 | 7,613 | 3.8% | $25.99 |
| BURIEN | 2,123,997 | 284,126 | 14,206 | 38,718 | 7,744 | 2.7% | $19.16 |
| CARNATION | 74,165 | 1,380 | 69 | 0 | 0 | 0.0% | $25.09 |
| CLYDE HILL | 3,943 | 0 | 0 | 0 | 0 | 0.0% | $33.53 |
| COVINGTON | 1,386,194 | 905,663 | 45,283 | 86,947 | 17,389 | 1.9% | $25.09 |
| DES MOINES | 550,679 | 60,521 | 3,026 | 20,550 | 4,110 | 6.8% | $19.16 |
| DUVALL | 221,123 | 124,243 | 6,212 | 0 | 0 | 0.0% | $25.09 |
| ENUMCLAW | 692,328 | 113,886 | 5,694 | 42,129 | 8,426 | 7.4% | $25.09 |
| FEDERAL WAY | 5,454,100 | 1,528,960 | 76,448 | 157,356 | 31,471 | 2.1% | $22.84 |
| HUNTS POINT | 0 | 0 | 0 | 0 | 0 | 0.0% | $33.99 |
| ISSAQUAH | 2,915,049 | 953,438 | 47,672 | 26,190 | 5,238 | 0.5% | $34.29 |
| KENMORE | 441,307 | 28,247 | 1,412 | 11,529 | 2,306 | 8.2% | $25.99 |
| KENT | 4,748,839 | 1,130,023 | 56,501 | 66,941 | 13,388 | 1.2% | $20.64 |
| KIRKLAND | 3,168,063 | 830,530 | 41,527 | 393,796 | 78,759 | 9.5% | $33.99 |
| LAKE FOREST PARK | 262,736 | 0 | 0 | 0 | 0 | 0.0% | $25.99 |
| MAPLE VALLEY | 819,030 | 466,204 | 23,310 | 31,127 | 6,225 | 1.3% | $25.09 |
| MEDINA | 6,178 | 2,880 | 144 | 0 | 0 | 0.0% | $33.53 |
| MERCER ISLAND | 399,368 | 85,899 | 4,295 | 10,665 | 2,133 | 2.5% | $36.89 |
| MILTON | 0 | 0 | 0 | 0 | 0 | 0.0% | $22.84 |
| NEWCASTLE | 260,483 | 88,934 | 4,447 | 39,445 | 7,889 | 8.9% | $34.29 |
| NORMANDY PARK | 168,528 | 87,463 | 4,373 | 4,561 | 912 | 1.0% | $19.16 |
| NORTH BEND | 637,612 | 41,668 | 2,083 | 3,586 | 717 | 1.7% | $25.09 |
| PACIFIC | 39,538 | 20,924 | 1,046 | 0 | 0 | 0.0% | $22.84 |
| REDMOND | 3,281,259 | 858,590 | 42,930 | 257,075 | 51,415 | 6.0% | $35.15 |
| RENTON | 4,957,839 | 1,653,643 | 82,682 | 134,623 | 26,925 | 1.6% | $30.07 |
| SAMMAMISH | 563,210 | 90,901 | 4,545 | 82,688 | 16,538 | 18.2% | $34.29 |
| SeaTac | 1,006,041 | 75,568 | 3,778 | 5,191 | 1,038 | 1.4% | $19.16 |
| SEATTLE | 33,123,598 | 8,284,590 | 414,230 | 2,501,582 | 500,316 | 6.0% | $0.00 |
| SHORELINE | 2,242,072 | 311,288 | 15,564 | 11,152 | 2,230 | 0.7% | $26.31 |
| SKYKOMISH | 17,121 | 0 | 0 | 0 | 0 | 0.0% | $25.09 |
| SNOQUALMIE | 381,417 | 224,072 | 11,204 | 65,807 | 13,161 | 5.9% | $25.09 |
| TUKWILA | 5,036,808 | 486,846 | 24,342 | 25,332 | 5,066 | 1.0% | $30.07 |
| WOODINVILLE | 1,337,946 | 273,574 | 13,679 | 41,217 | 8,243 | 3.0% | $30.46 |
| YARROW POINT | 0 | 0 | 0 | 0 | 0 | 0.0% | $33.99 |

Note: all deliveries are gross and measured in square feet.

*Source: King County Assessor, Costar*

## Table A8. Market Data – Office Product

| CITY | total Product supply (sf) | Total Deliveries 2000-2019 (SF) | Average Annual Deliveries 2000-2019 (SF) | 5-yr Total Deliveries last (gross, sf) | 5-Yr Average Annual Deliveries (Gross, sf) | 5-yr. Total Deliveries as a % of 20-year Total Deliveries (Gross) | Current average rent, (Annual, $/SF) | Average Rent 2015, (Annual, $/SF) | Average Rent 2010, (Annual, $/SF) |
|---|---|---|---|---|---|---|---|---|---|
| ALGONA | 60,226 | 10,832 | 542 | 0 | 0 | 0.0% | $25.18 | $20.57 | $19.43 |
| AUBURN | 1,985,098 | 452,657 | 22,633 | 91,078 | 18,216 | 4.0% | $25.29 | $20.57 | $19.43 |
| BEAUX ARTS | 0 | 0 | 0 | 0 | 0 | 0.0% | $39.35 | $27.55 | $24.16 |
| BELLEVUE | 26,545,988 | 9,727,048 | 486,352 | 2,577,743 | 515,549 | 5.3% | $0.00 | $0.00 | $0.00 |
| BLACK DIAMOND | 41,815 | 6,017 | 301 | 0 | 0 | 0.0% | $30.34 | $21.92 | $18.69 |
| BOTHELL | 2,023,327 | 843,248 | 42,162 | 25,872 | 5,174 | 0.6% | $30.42 | $23.94 | $22.86 |
| BURIEN | 1,030,591 | 326,129 | 16,306 | 91,131 | 18,226 | 5.6% | $26.10 | $20.80 | $19.44 |
| CARNATION | 33,053 | 17,291 | 865 | 15,866 | 3,173 | 18.4% | $30.34 | $21.92 | $18.69 |
| CLYDE HILL | 0 | 0 | 0 | 0 | 0 | 0.0% | $38.53 | $27.33 | $23.03 |
| COVINGTON | 214,351 | 106,877 | 5,344 | 1,460 | 292 | 0.3% | $30.34 | $21.92 | $18.69 |
| DES MOINES | 641,412 | 390,697 | 19,535 | 307,543 | 61,509 | 15.7% | $26.10 | $20.80 | $19.44 |
| DUVALL | 108,583 | 52,756 | 2,638 | 0 | 0 | 0.0% | $30.34 | $21.92 | $18.69 |
| ENUMCLAW | 377,153 | 52,076 | 2,604 | 0 | 0 | 0.0% | $30.34 | $21.92 | $18.69 |
| FEDERAL WAY | 4,461,300 | 843,481 | 42,174 | 42,713 | 8,543 | 1.0% | $25.29 | $20.57 | $19.43 |
| HUNTS POINT | 0 | 0 | 0 | 0 | 0 | 0.0% | $42.97 | $30.26 | $25.67 |
| ISSAQUAH | 3,298,093 | 1,359,752 | 67,988 | 53,402 | 10,680 | 0.8% | $41.57 | $29.23 | $24.70 |
| KENMORE | 157,960 | 37,573 | 1,879 | 29,354 | 5,871 | 15.6% | $30.42 | $23.94 | $22.86 |
| KENT | 3,870,644 | 812,971 | 40,649 | 282,178 | 56,436 | 6.9% | $25.91 | $20.84 | $19.60 |
| KIRKLAND | 5,255,033 | 1,862,111 | 93,106 | 755,506 | 151,101 | 8.1% | $42.97 | $30.26 | $25.67 |
| LAKE FOREST PARK | 84,164 | 7,846 | 392 | 0 | 0 | 0.0% | $30.42 | $23.94 | $22.86 |
| MAPLE VALLEY | 181,647 | 131,502 | 6,575 | 0 | 0 | 0.0% | $30.34 | $21.92 | $18.69 |
| MEDINA | 11,591 | 4,929 | 246 | 0 | 0 | 0.0% | $38.53 | $27.33 | $23.03 |
| MERCER ISLAND | 672,897 | 34,015 | 1,701 | 0 | 0 | 0.0% | $41.23 | $29.10 | $24.47 |
| MILTON | 0 | 0 | 0 | 0 | 0 | 0.0% | $25.29 | $20.57 | $19.43 |
| NEWCASTLE | 49,454 | 40,326 | 2,016 | 0 | 0 | 0.0% | $41.57 | $29.23 | $24.70 |
| NORMANDY PARK | 51,969 | 6,871 | 344 | 0 | 0 | 0.0% | $26.10 | $20.80 | $19.44 |
| NORTH BEND | 178,109 | 55,174 | 2,759 | 21,878 | 4,376 | 7.9% | $30.34 | $21.92 | $18.69 |
| PACIFIC | 4,860 | 0 | 0 | 0 | 0 | 0.0% | $25.29 | $20.57 | $19.43 |
| REDMOND | 14,449,452 | 5,801,050 | 290,053 | 367,880 | 73,576 | 1.3% | $35.01 | $24.27 | $20.58 |
| RENTON | 9,430,789 | 2,250,356 | 112,518 | 1,515,142 | 303,028 | 13.5% | $30.13 | $23.05 | $21.03 |
| SAMMAMISH | 137,965 | 56,892 | 2,845 | 30,815 | 6,163 | 10.8% | $41.57 | $29.23 | $24.70 |
| SeaTac | 3,459,825 | 1,016,197 | 50,810 | 184,812 | 36,962 | 3.6% | $26.10 | $20.80 | $19.44 |
| SEATTLE | 104,433,911 | 37,805,345 | 1,890,267 | 14,785,999 | 2,957,200 | 7.8% | $0.00 | $0.00 | $0.00 |
| SHORELINE | 998,897 | 249,497 | 12,475 | 18,179 | 3,636 | 1.5% | $27.53 | $21.73 | $20.77 |
| SKYKOMISH | 672 | 0 | 0 | 0 | 0 | 0.0% | $30.34 | $21.92 | $18.69 |
| SNOQUALMIE | 480,283 | 290,705 | 14,535 | 10,601 | 2,120 | 0.7% | $30.34 | $21.92 | $18.69 |
| TUKWILA | 5,065,670 | 504,792 | 25,240 | 25,482 | 5,096 | 1.0% | $30.13 | $23.05 | $21.03 |
| WOODINVILLE | 354,211 | 81,414 | 4,071 | 15,305 | 3,061 | 3.8% | $28.62 | $22.82 | $21.90 |
| YARROW POINT | 0 | 0 | 0 | 0 | 0 | 0.0% | $42.97 | $30.26 | $25.67 |

Note: all deliveries are gross and measured in square feet.

*Source: King County Assessor, Costar*

## Table A9. Market Data – Industrial Product

| CITY | Total Product supply (sf) | Total Deliveries 2000-2019 (SF) | Average Annual Deliveries 2000-2019 (SF) | 5-yr Total Deliveries last (gross, sf) | 5-Yr Average Annual Deliveries (Gross, sf) | 5-yr. Total Deliveries as a % of 20-year Total Deliveries (Gross) | Current average rent, (Annual, $/SF) |
|---|---|---|---|---|---|---|---|
| ALGONA | 2,436,435 | 329,838 | 16,492 | 0 | 0 | 0.0% | $8.86 |
| AUBURN | 23,959,569 | 8,559,752 | 427,988 | 921,067 | 184,213 | 2.2% | $8.86 |
| BEAUX ARTS | 0 | 0 | 0 | 0 | 0 | 0.0% | $18.44 |
| BELLEVUE | 4,853,067 | 520,591 | 26,030 | 163,698 | 32,740 | 6.3% | $16.64 |
| BLACK DIAMOND | 71,790 | 30,703 | 1,535 | 17,602 | 3,520 | 11.5% | $14.13 |
| BOTHELL | 1,891,744 | 462,999 | 23,150 | 129,880 | 25,976 | 5.6% | $17.98 |
| BURIEN | 1,811,122 | 749,988 | 37,499 | 705,698 | 141,140 | 18.8% | $12.28 |
| CARNATION | 161,286 | 69,076 | 3,454 | 0 | 0 | 0.0% | $14.13 |
| CLYDE HILL | 2,430 | 0 | 0 | 0 | 0 | 0.0% | $16.64 |
| COVINGTON | 350,018 | 202,591 | 10,130 | 201,646 | 40,329 | 19.9% | $14.13 |
| DES MOINES | 1,892,369 | 1,666,085 | 83,304 | 1,555,277 | 311,055 | 18.7% | $12.28 |
| DUVALL | 164,303 | 89,407 | 4,470 | 89,407 | 17,881 | 20.0% | $14.13 |
| ENUMCLAW | 1,028,576 | 235,590 | 11,780 | 78,418 | 15,684 | 6.7% | $14.13 |
| FEDERAL WAY | 2,732,946 | 752,173 | 37,609 | 443,868 | 88,774 | 11.8% | $12.52 |
| HUNTS POINT | 0 | 0 | 0 | 0 | 0 | 0.0% | $14.13 |
| ISSAQUAH | 1,421,025 | 317,409 | 15,870 | 88,604 | 17,721 | 5.6% | $18.44 |
| KENMORE | 536,730 | 32,696 | 1,635 | 14,400 | 2,880 | 8.8% | $17.98 |
| KENT | 46,653,264 | 6,702,321 | 335,116 | 2,461,588 | 492,318 | 7.3% | $8.79 |
| KIRKLAND | 3,759,313 | 347,474 | 17,374 | 87,975 | 17,595 | 5.1% | $15.13 |
| LAKE FOREST PARK | 14,757 | 1,120 | 56 | 0 | 0 | 0.0% | $17.98 |
| MAPLE VALLEY | 321,719 | 122,379 | 6,119 | 0 | 0 | 0.0% | $14.13 |
| MEDINA | 16,283 | 9,600 | 480 | 0 | 0 | 0.0% | $16.64 |
| MERCER ISLAND | 96,230 | 63,910 | 3,196 | 0 | 0 | 0.0% | $18.44 |
| MILTON | 1,300 | 0 | 0 | 0 | 0 | 0.0% | $8.38 |
| NEWCASTLE | 227,320 | 3,890 | 195 | 0 | 0 | 0.0% | $18.44 |
| NORMANDY PARK | 47,284 | 0 | 0 | 0 | 0 | 0.0% | $12.28 |
| NORTH BEND | 852,090 | 368,109 | 18,405 | 0 | 0 | 0.0% | $14.13 |
| PACIFIC | 254,978 | 21,038 | 1,052 | 0 | 0 | 0.0% | $8.86 |
| REDMOND | 10,139,556 | 794,471 | 39,724 | 95,833 | 19,167 | 2.4% | $15.60 |
| RENTON | 13,611,660 | 2,705,502 | 135,275 | 877,590 | 175,518 | 6.5% | $10.42 |
| SAMMAMISH | 163,595 | 50,545 | 2,527 | 0 | 0 | 0.0% | $15.60 |
| SeaTac | 4,256,960 | 1,257,196 | 62,860 | 457,299 | 91,460 | 7.3% | $12.28 |
| SEATTLE | 48,484,934 | 4,498,050 | 224,903 | 2,322,848 | 464,570 | 10.3% | $0.00 |
| SHORELINE | 1,447,694 | 590,900 | 29,545 | 382,122 | 76,424 | 12.9% | $13.35 |
| SKYKOMISH | 12,385 | 0 | 0 | 0 | 0 | 0.0% | $10.93 |
| SNOQUALMIE | 1,083,332 | 637,305 | 31,865 | 34,912 | 6,982 | 1.1% | $14.13 |
| TUKWILA | 14,963,571 | 1,015,066 | 50,753 | 174,726 | 34,945 | 3.4% | $11.95 |
| WOODINVILLE | 5,868,390 | 644,681 | 32,234 | 254,252 | 50,850 | 7.9% | $12.57 |
| YARROW POINT | 0 | 0 | 0 | 0 | 0 | 0.0% | $15.13 |

Note: all deliveries are gross and measured in square feet. *Source: King County Assessor, Costar*

## Table A10. Mark Factor – Past Assumptions

| | | | Residential Market Supply Factors | | | | Industrial/Commercial Market Supply Factors | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | Explicit Supply Market Supply Factor | | Unincorporated UGA | | Cities (Range) | | Unincorporated UGA | | Cities (Range) | |
| Buildable Lands County | Owner Intent/ Not Available | Small Town Growth Margin | Vacant | Under-Utilized | Vacant | Under-Utilized (1/) | Vacant | Under-Utilized | Vacant | Under-Utilized (1/) |
| **Clark** | ✓ | | 10% | 30% | 0% - 10% | 0%-30% | 20% | 50% | 0% - 10% | 0% - 10% |
| **King** | ✓ | | 10%-15% | 25%-30% | 0% - 50% (2/) | 0%-50% (2/) | 10% - 15% | 25% - 30% | 0% - 40% | 0% - 40% |
| **Kitsap** | ✓ | | 5% | 15% | 5% | 10%-90% (3/) | 20% | 25% | 20% | 50% - 80% (3/) |
| **Pierce** | ✓ | | 15% | 40% | 0% - 50% | 0%-50% | 20% | 50% | 0% - 50% | 0% - 50% |
| **Snohomish** | ✓ | | 15% | 30% | 15% | 30% | 15% | 30% | 15% | 30% |
| **Thurston (4/)** | ✓ | ✓ | 10% - 37% | 10% - 37% | 20% - 37% (5/) | 20%-37% (5/) | 10% - 25% | 10% - 25% | 10% - 25% | 10% - 25% |
| **Whatcom** | ✓ | | 15% | 25% | 15% - 70% (6/) | 25%-70% (6/) | 15% | 25% | 15% | 25% |
| | | **Averages/Ranges:** | 12% | 28% | 7% - 37% | 9% - 55% | 16% | 33% | 8% - 24% | 17% - 38% |

Source: Buildable Lands Guidelines, Department of Commerce, 2018.

# 4. Appendix B – City of Seattle Guidance

# City of Seattle – Modified Market Factor Guidance Framework

## Intro and Purpose

The City of Seattle stands as the employment and population center of the Puget Sound region and largest City in the State of Washington as well as the Pacific Northwest. It also serves an important role in accommodating population and employment growth in King County now and into the future. Seattle is unique in its geographic and economic diversity. The City is home to distinct neighborhoods and commercial districts at a scale not seen elsewhere in the County. As such, Market Factor guidance specific to the City of Seattle has been developed to account for the size, scale and regional importance of the City.

The guidance and recommendations in this section follow the same methodology and framework used for all jurisdictions in King County, but at a neighborhood level rather than at a citywide scale. This allows for a more granular view of historic and projected growth within the City, by Product-type. This also provides the City with a framework allowing for greater flexibility when applying Market Factor assumptions across disparate neighborhoods within the City.

## Contents

Following guidance reflects the same guidance framework used across King County, the following pages provide a step-by-step overview of Market Factor recommendations for the City of Seattle followed by supporting data found in **Tables B3-B7**.

## Data Sources

- King County Assessor Data
- City of Seattle Draft Capacity Data
- Costar Market Data
- Redfin Residential Sales Data

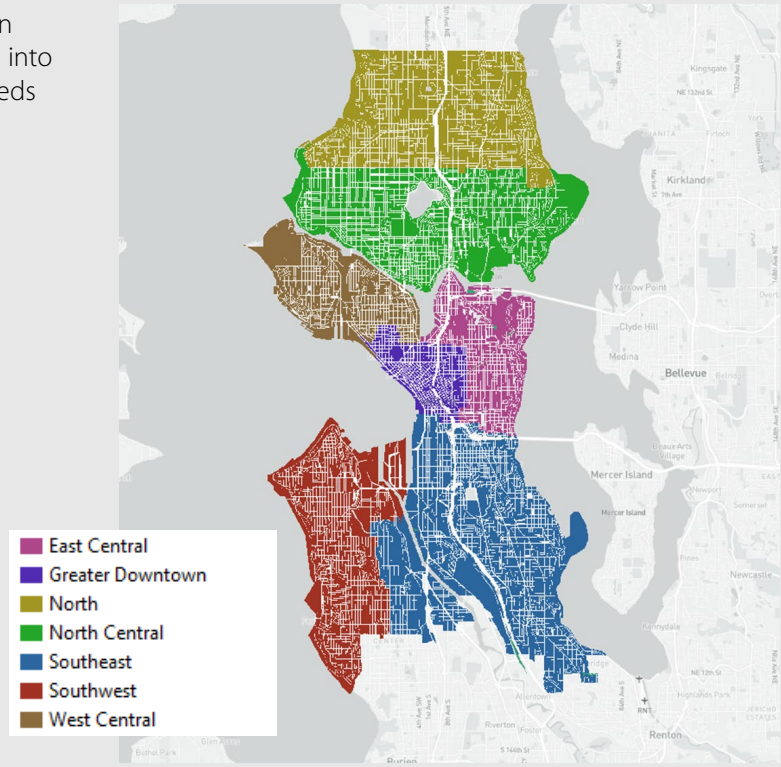
## Sub-geographies

The City of Seattle is designated as a metropolitan regional Geography. The City was further divided into seven general areas based upon the Housing Needs Assessment (HNA) boundaries.

These are the following HNA boundaries and are indicated on the map to the right.

- North
- North Central
- West Central
- East Central
- Downtown
- Southwest
- Southeast

### *HNA Geographic Boundaries*



## Guidance Framework Modified –

The following diagram outlines key changes made to the overall Market Factor Guidance Framework to establish Market Factor for the City of Seattle. The following changes represent modifications to the Market Factor Guidance Framework set forth earlier in the report (page 17) .

| Step | |
|---|---|
| **Step 1.** Identify Zoning by Predominant Product-Type | • This step remains largely unchanged for the city of Seattle, with the exception that attached single family units are addressed as their own product type (defined on following page). Reference Product-type definitions provided on page 19 (see **Table 1A**) for all other Product-types. |
| **Step 2.** Identify Market Factor Alignment for the Seattle Sub-Geographies | • Instead of using PSRC Regional Geographies to compare and classify Market Factor Indicators, the City of Seattle is broken down into sub-geographies (HNA boundaries, page 41). These sub-geographies are then compared against each other to inform a Market Factor Alignment.<br>• The Market Factor Alignment Table has been updated to reflect these new geographies and their alignments. |
| **Step 3**. Select from Market Factor Ranges | • The market factor ranges have been updated to reflect the City of Seattle sub-geographies and the market metrics informing the range of Market Factors by Product-type.<br>• The table has been updated to reflect the changes to the ranges and the additional Product-types. |
| **Step 4.** Adjustments | • This step remains unchanged, and the City of Seattle is encouraged to adjust the Market Factor guidance based on the City's perception and knowledge of each Product-type in each sub-geography. |

## Step 1 – Identify Zoning By Predominant Product Type

**See additional Product-Type classification for the City of Seattle below**

| Product Type | Description/Application | Illustrative Examples |
|---|---|---|
| **Residential** | | |
| Single Family Attached* | This category has been added for the City of Seattle to account for all attached single family dwelling units sharing walls separately. | These include townhouse plats, duplex, triplex and fourplex buildings. |

** Note: for the City of Seattle, the single family attached Product-type, is accounted for separate of traditional single family detached product.*

## Step 2 – Identify Market Alignment

**Seattle Market Factor Alignments**

The *Market Factor Alignments* (high/medium/low) identified in this step are applied in step 3 when selecting the appropriate Market Factor Ranges.

Each of the City's sub-geography market conditions have been evaluated and *Market Factor Alignment* has been assigned by Product-type. Use **Table B1** (below) as a reference in selecting appropriate Market Factor Ranges by product-type in Step 3. To review the Market Factor Indicators for the sub-geographies within the City of Seattle, refer to **Tables B3-B5** found later in this section.

**Methodology Recap:**

The Market Factor Alignments for the sub-geographies in the City of Seattle are informed by the Market Factor Indicators calculated for each sub-geography and Product-type.

**Table B1 –** Market Factor Alignments for City of Seattle Sub-Geographies

| **Seattle Sub-geography** | **Product-Type Market Factor Indicator** | | | | |
|---|---|---|---|---|---|
| *City* | *Multifamily/MU* | *Single Family Attached* | *Single Family Detached* | *Commercial (Office /Retail/Mixed-use)* | *Industrial* |
| East Central | Medium | Low | Medium | High | NA |
| Greater Downtown | Low | Medium | Low | Low | Low |
| North | High | Medium | High | High | NA |
| North Central | Low | Low | High | High | High |
| Southeast | High | High | High | High | High |
| Southwest | High | High | High | High | Medium |
| West Central | Low | Low | Medium | Medium | Low |

## Step 3 - Select from Market Factor Ranges

### Market Factor Range

For each of the City's sub-geographies and Product-types, identify the Market Factor Range in the table below (**Table B2**) by using the Market Factor Alignments (low/medium/high) identified in Step 2.

*Note: these informed ranges are intended to serve as initial guidance. It is expected that City of Seattle refines or departs from this range to arrive at the most appropriate market factor deduction.*

### Methodology Recap

A Market Factor Indicator from a test-fit sub-geography within the City of Seattle is selected to inform the market factor ranges.

Market price data is leveraged as the key metric to derive a range from the market factor indicator in the test fit geography. The range of prices among all the City of Seattle's sub-geographies (see **Tables B6-B7**) for each product type inform the magnitude of the market Factor Range for that product-type.

**Table B2 –** Market Factor Ranges by Product Type

| | Residential | | | | |
|---|---|---|---|---|---|
| | **Multifamily/ Mixed-Res** | **Single Family Attached** | **Single Family Detached** | **Commercial (Office/Retail/Mixed)** | **Industrial** |
| **City of Seattle** | | | | | |
| Low | 4% - 11% | 0% - 13% | 0% - 9% | 5% - 24% | 3% - 14% |
| Medium | 12% - 20% | 14% - 38% | 10% - 26% | 25% - 35% | 15% - 21% |
| High | 21% - 29% | 39% - 50% | 27% - 43% | 36% - 50% | 22% - 27% |

## Table B3. Supply, Deliveries, & Capacity Table:

Residential – *Single family, Single Family Attached, Multi-family and Residential Mixed-use*

| Residential Uses | Neighborhood (HNA boundaries) | Regional Geography | Market Factor Alignment | Total Supply (Units) | 5-yr Average Annual Deliveries (Gross Units, 2015-2019) | Assumed Capacity Estimates from Cities (Gross, Units) | Market Factor Indicator |
|---|---|---|---|---|---|---|---|
| **Single Family** | East Central | Seattle Sub-type | Low | 11,705 | 48 | 1,026 | 7% |
| **Single Family** | Greater Downtown | Seattle Sub-type | Medium | 595 | 3 | 73 | 23% |
| **Single Family** | North | Seattle Sub-type | Medium | 26,440 | 91 | 2,224 | 18% |
| **Single Family** | North Central | Seattle Sub-type | Low | 34,628 | 150 | 769 | 0% |
| **Single Family** | Southeast | Seattle Sub-type | High | 26,581 | 109 | 8,369 | 74% |
| **Single Family** | Southwest | Seattle Sub-type | High | 21,135 | 84 | 3,105 | 46% |
| **Single Family** | West Central | Seattle Sub-type | Low | 10,782 | 52 | 511 | 0% |
| **Single Family** | City of Seattle | Metropolitan | | 131,866 | 537 | 16,077 | 33% |
| **Single Family Attached** | East Central | Seattle Sub-type | Medium | 5,658 | 205 | 5,575 | 26% |
| **Single Family Attached** | Greater Downtown | Seattle Sub-type | Low | 1,336 | 37 | 462 | 0% |
| **Single Family Attached** | North | Seattle Sub-type | High | 4,910 | 94 | 6,171 | 70% |
| **Single Family Attached** | North Central | Seattle Sub-type | High | 10,421 | 319 | 12,871 | 50% |
| **Single Family Attached** | Southeast | Seattle Sub-type | High | 4,935 | 194 | 12,238 | 68% |
| **Single Family Attached** | Southwest | Seattle Sub-type | High | 4,606 | 152 | 7,188 | 58% |
| **Single Family Attached** | West Central | Seattle Sub-type | Medium | 3,408 | 94 | 3,255 | 42% |
| **Single Family Attached** | City of Seattle | Metropolitan | | 35,274 | 1,096 | 47,760 | 54% |
| **Mixed-use/MF/Condos** | East Central | Seattle Sub-type | Medium | 15,595 | 529 | 15,669 | 32% |
| **Mixed-use/MF/Condos** | Greater Downtown | Seattle Sub-type | Low | 74,008 | 3,669 | 44,242 | 0% |
| **Mixed-use/MF/Condos** | North | Seattle Sub-type | High | 20,285 | 352 | 55,225 | 87% |
| **Mixed-use/MF/Condos** | North Central | Seattle Sub-type | Low | 35,335 | 1,442 | 31,237 | 8% |
| **Mixed-use/MF/Condos** | Southeast | Seattle Sub-type | High | 11,607 | 414 | 34,660 | 76% |
| **Mixed-use/MF/Condos** | Southwest | Seattle Sub-type | High | 12,399 | 256 | 13,040 | 61% |
| **Mixed-use/MF/Condos** | West Central | Seattle Sub-type | Low | 14,041 | 492 | 7,246 | 0% |
| **Mixed-use/MF/Condos** | City of Seattle | Metropolitan | | 183,270 | 7,155 | 201,319 | 29% |

## Table B4. Supply, Deliveries, & Capacity Table:
Non-Residential – Industrial

| Non-Residential Uses | Neighborhood (HNA boundaries) | Market Factor Alignment | Total Supply (SF) | 5-yr Average Annual Deliveries (Gross SF,2015-2019) | Assumed Capacity Estimates from Cities (Gross SF) | Market Factor Indicator |
|---|---|---|---|---|---|---|
| **Industrial** | East Central | NA | 1,071,715 | 39,800 | 0 | No Capacity |
| **Industrial** | Greater Downtown | Low | 2,498,938 | 25,934 | 184,384 | 0% |
| **Industrial** | North | NA | 2,513,041 | 72,104 | 0 | No Capacity |
| **Industrial** | North Central | High | 5,481,941 | 46,781 | 2,489,843 | 62% |
| **Industrial** | Southeast | High | 28,970,357 | 178,780 | 10,666,880 | 66% |
| **Industrial** | Southwest | Medium | 3,041,201 | 22,790 | 685,437 | 34% |
| **Industrial** | West Central | Low | 4,907,741 | 78,381 | 1,716,513 | 9% |
| **Industrial** | City of Seattle | | 48,484,934 | 464,570 | 15,743,057 | 41% |

## Table B5. Supply, Deliveries, & Capacity Table:
Non-Residential – Commercial (Office/Retail/Mixed-use)

| Non-Residential Uses | Neighborhood (HNA boundaries) | Market Factor Alignment | Total Supply (SF) | 5-yr Average Annual Deliveries (Gross SF,2015-2019) | Assumed Capacity Estimates from Cities (Gross SF) | Market Factor Indicator |
|---|---|---|---|---|---|---|
| **Commercial** | East Central | High | 7,082,265 | 99,488 | 6,418,782 | 69% |
| **Commercial** | Greater Downtown | Low | 82,200,368 | 2,632,501 | 24,041,513 | 0% |
| **Commercial** | North | High | 7,780,108 | 19,480 | 40,181,095 | 99% |
| **Commercial** | North Central | High | 13,670,239 | 287,330 | 20,299,610 | 72% |
| **Commercial** | Southeast | High | 17,654,728 | 192,707 | 34,852,416 | 89% |
| **Commercial** | Southwest | High | 3,500,611 | 44,465 | 9,158,698 | 90% |
| **Commercial** | West Central | Medium | 5,669,190 | 181,545 | 5,561,376 | 35% |
| **Commercial** | City of Seattle | | 137,557,509 | 3,457,516 | 140,513,490 | 51% |

## Table B6. Market Data – Residential

### Residential – Multifamily

| Seattle Sub-Geography | Total Product Supply | Total Deliveries 2000-2019 | Average Annual Deliveries 2000-2019 | Total Deliveries 2015-2019 | 5-yr Average Annual Deliveries (2015-2019) | 5-yr. Total Deliveries over 20-year Total Deliveries (%) | Current average rent, (Monthly $/SF ) | Average Rent 2015, (Monthly $/SF ) | Average Rent 2010, (Monthly $/SF ) |
|---|---|---|---|---|---|---|---|---|---|
| East Central | 15,595 | 4,860 | 243 | 2,645 | 529 | 54% | $2.58 | $2.32 | $2.01 |
| Greater Downtown | 74,008 | 38,654 | 1,933 | 18,346 | 3,669 | 47% | $3.09 | $2.77 | $2.38 |
| North | 20,285 | 4,983 | 249 | 1,759 | 352 | 35% | $2.03 | $1.82 | $1.53 |
| North Central | 35,335 | 15,365 | 768 | 7,211 | 1,442 | 47% | $2.64 | $2.35 | $2.03 |
| Southeast | 11,607 | 4,965 | 248 | 2,071 | 414 | 42% | $1.94 | $1.71 | $1.53 |
| Southwest | 12,399 | 4,100 | 205 | 1,281 | 256 | 31% | $2.29 | $1.99 | $1.70 |
| West Central | 14,041 | 5,042 | 252 | 2,462 | 492 | 49% | $2.71 | $2.39 | $2.08 |
| **City of Seattle** | 183,270 | 77,969 | 3,898 | 35,775 | 7,155 | 46% | | | |

### Residential – Single Family

| Seattle Sub-Geography | Total Product Supply | Total Unit Deliveries 2000-2019 | Average Annual Deliveries 2000-2019 (Units) | Total Deliveries last 5 years (gross, units) | Average Annual Deliveries last 5 years (Gross, Units) | 5-yr. Total Deliveries as a % of 20-year Total Deliveries (Gross) | Median Sale Price 2020 | Median Sale Price 2015 | Median Sale Price 2012 | 6-year CAGR | 9- year CAGR |
|---|---|---|---|---|---|---|---|---|---|---|---|
| East Central | 11,705 | 923 | 46 | 239 | 48 | 26% | $905,000 | $638,000 | $502,000 | 6.0% | 4.0% |
| Greater Downtown | 595 | 41 | 2 | 14 | 3 | 34% | $575,500 | $407,500 | $305,000 | 5.9% | 3.9% |
| North | 26,440 | 1,750 | 88 | 457 | 91 | 26% | $650,000 | $477,500 | $333,000 | 5.3% | 3.5% |
| North Central | 34,628 | 2,067 | 103 | 749 | 150 | 36% | $816,500 | $625,000 | $450,000 | 4.6% | 3.0% |
| Southeast | 26,581 | 2,663 | 133 | 546 | 109 | 21% | $661,000 | $453,000 | $284,000 | 6.5% | 4.3% |
| Southwest | 21,135 | 1,686 | 84 | 421 | 84 | 25% | $642,000 | $450,000 | $340,000 | 6.1% | 4.0% |
| West Central | 10,782 | 867 | 43 | 259 | 52 | 30% | $823,500 | $586,000 | $483,000 | 5.8% | 3.9% |
| **City of Seattle** | 131,866 | 9,997 | 500 | 2,685 | 537 | 27% | $679,000 | $494,000 | $368,000 | 5.4% | 3.6% |

Note: all deliveries are gross and measured in square units.

*Source: King County Assessor, Costar, Redfin*

## Table B7. Market Data – Non-Residential

### Non-Residential – Industrial

| Seattle Sub-Geography | total Product supply (sf) | Total Deliveries 2000-2019 (SF) | Average Annual Deliveries 2000-2019 (SF) | 5-yr Total Deliveries last (gross, sf) | 5-Yr Average Annual Deliveries (Gross, sf) | 5-yr. Total Deliveries as a % of 20-year Total Deliveries (Gross) | Current average rent, (Annual, $/SF) | Average Rent 2015, (Annual, $/SF) | Average Rent 2010, (Annual, $/SF) |
|---|---|---|---|---|---|---|---|---|---|
| East Central | 1,071,715 | 342,132 | 17,107 | 199,001 | 39,800 | 58% | $15.00 | $10.20 | $6.58 |
| Greater Downtown | 2,498,938 | 232,009 | 11,600 | 129,670 | 25,934 | 56% | $22.88 | $13.00 | $10.61 |
| North | 2,513,041 | 576,139 | 28,807 | 360,521 | 72,104 | 63% | $16.03 | $8.73 | $9.22 |
| North Central | 5,481,941 | 572,175 | 28,609 | 233,903 | 46,781 | 41% | $17.70 | $22.30 | $8.50 |
| Southeast | 28,970,357 | 1,999,207 | 99,960 | 893,898 | 178,780 | 45% | $12.41 | $8.56 | $7.17 |
| Southwest | 3,041,201 | 218,811 | 10,941 | 113,949 | 22,790 | 52% | $14.13 | $9.27 | $9.15 |
| West Central | 4,907,741 | 557,577 | 27,879 | 391,906 | 78,381 | 70% | $13.10 | $10.67 | $9.09 |
| **City of Seattle** | 48,484,934 | 4,498,050 | 224,903 | 2,322,848 | 464,570 | 52% | | | |

### Non-Residential – Office

| Seattle Sub-Geography | Total Product supply (sf) | Total Deliveries 2000-2019 (SF) | Average Annual Deliveries 2000-2019 (SF) | 5-yr Total Deliveries 2015-2019 (gross, sf) | 5-Yr Average Annual Deliveries (Gross, sf) | 5-yr. Total Deliveries as a % of 20-year Total Deliveries (Gross) | Current average rent, (Annual, $/SF) | Average Rent 2015, (Annual, $/SF) | Average Rent 2010, (Annual, $/SF) |
|---|---|---|---|---|---|---|---|---|---|
| East Central | 5,542,044 | 1,991,909 | 99,595 | 277,914 | 55,583 | 14% | $39.03 | $26.07 | $26.72 |
| Greater Downtown | 69,906,518 | 27,176,902 | 1,358,845 | 12,159,927 | 2,431,985 | 45% | $29.01 | $29.05 | $22.83 |
| North | 2,643,527 | 410,387 | 20,519 | 71,318 | 14,264 | 17% | $30.43 | $22.86 | $20.90 |
| North Central | 7,184,334 | 2,778,142 | 138,907 | 918,762 | 183,752 | 33% | $30.00 | $25.52 | $20.58 |
| Southeast | 13,407,609 | 3,195,823 | 159,791 | 493,755 | 98,751 | 15% | $27.67 | $25.05 | $18.70 |
| Southwest | 1,490,647 | 329,756 | 16,488 | 71,968 | 14,394 | 22% | $25.26 | $23.67 | $20.31 |
| West Central | 4,259,232 | 1,922,426 | 96,121 | 792,355 | 158,471 | 41% | $33.09 | $28.77 | $19.12 |
| **City of Seattle** | 104,433,911 | 37,805,345 | 1,890,267 | 14,785,999 | 2,957,200 | 39% | | | |

### Non-Residential – Retail

| Seattle Sub-Geography | Total Product supply (sf) | Total Deliveries 2000-2019 (SF) | Average Annual Deliveries 2000-2019 (SF) | 5-yr Total Deliveries last (gross, sf) | 5-Yr Average Annual Deliveries (Gross, sf) | 5-yr. Total Deliveries as a % of 20-year Total Deliveries (Gross) | Current average rent, (Annual, $/SF) | Average Rent 2015, (Annual, $/SF) | Average Rent 2010, (Annual, $/SF) |
|---|---|---|---|---|---|---|---|---|---|
| East Central | 1,540,221 | 459,411 | 22,971 | 219,528 | 43,906 | 48% | $30.55 | $23.57 | $21.02 |
| Greater Downtown | 12,293,850 | 2,920,458 | 146,023 | 1,002,576 | 200,515 | 34% | $29.01 | $29.05 | $22.83 |
| North | 5,136,581 | 1,148,079 | 57,404 | 26,080 | 5,216 | 2% | $22.85 | $19.18 | $18.11 |
| North Central | 6,485,905 | 1,423,998 | 71,200 | 517,888 | 103,578 | 36% | $25.94 | $25.88 | $19.32 |
| Southeast | 4,247,119 | 1,356,028 | 67,801 | 469,782 | 93,956 | 35% | $25.63 | $16.26 | $14.96 |
| Southwest | 2,009,964 | 631,893 | 31,595 | 150,359 | 30,072 | 24% | $32.85 | $19.95 | $21.13 |
| West Central | 1,409,958 | 344,723 | 17,236 | 115,369 | 23,074 | 33% | $34.17 | $30.55 | $24.02 |
| **City of Seattle** | 33,123,598 | 8,284,590 | 414,230 | 2,501,582 | 500,316 | 30% | | | |

Note: all deliveries are gross and measured in square feet.

*Source: King County Assessor, Costar*

# Appendix F: Employment Density Guidance

# 2021 King County Urban Growth Capacity Report

**Employment Density Guidance**

## INTRODUCTION

This document provides guidance on developing assumptions for converting non-residential building area expressed in gross square feet to expected capacity for employment in buildable lands calculations. This is the final step in estimating total capacity for new employment growth in a jurisdiction. Current statutes and regulations (RCW 36.70A.215 and WAC 365.196.315) do not provide specific requirements for these calculations. Jurisdictions have discretion to develop assumptions that are consistent with local circumstances, provided they document the rationale. Therefore, this guidance also includes rationale to draw upon in the process of selecting appropriate assumptions.

While there are various ways to convert land capacity to capacity for new employment, King County has selected to use an approach that converts non-residential development capacity measured in square feet of floor area to capacity for new employment. This conversion requires assumptions for the average number of built square feet of floor area for each job. The lower the square foot per job, the higher the density of use. The calculation is simply:

***Total job capacity*** = *Gross square footage*[1] *of floor area capacity / gross square footage per job*

Square footage per job can vary widely by building type or employment sector. For example, warehouses devote a great deal of square footage to storing inventory or other goods, and therefore they typically require considerably more square footage per job than office space. Therefore, average employment density assumptions should reflect the types of job growth that are expected in an area.

Many jurisdictions select different employment density assumptions for commercial and industrial zones to reflect different expectations for the type of development and job growth that are expected in those zones. Some jurisdictions even vary employment density assumptions among different commercial zones. For example, a city may assume that average square footage per job is lower in a downtown zone than in other commercial zones further from the core. This decision could reflect expectations that a higher proportion of the downtown floor area capacity will be used as office space, compared to other commercial zones where lower density retail uses may be more common.

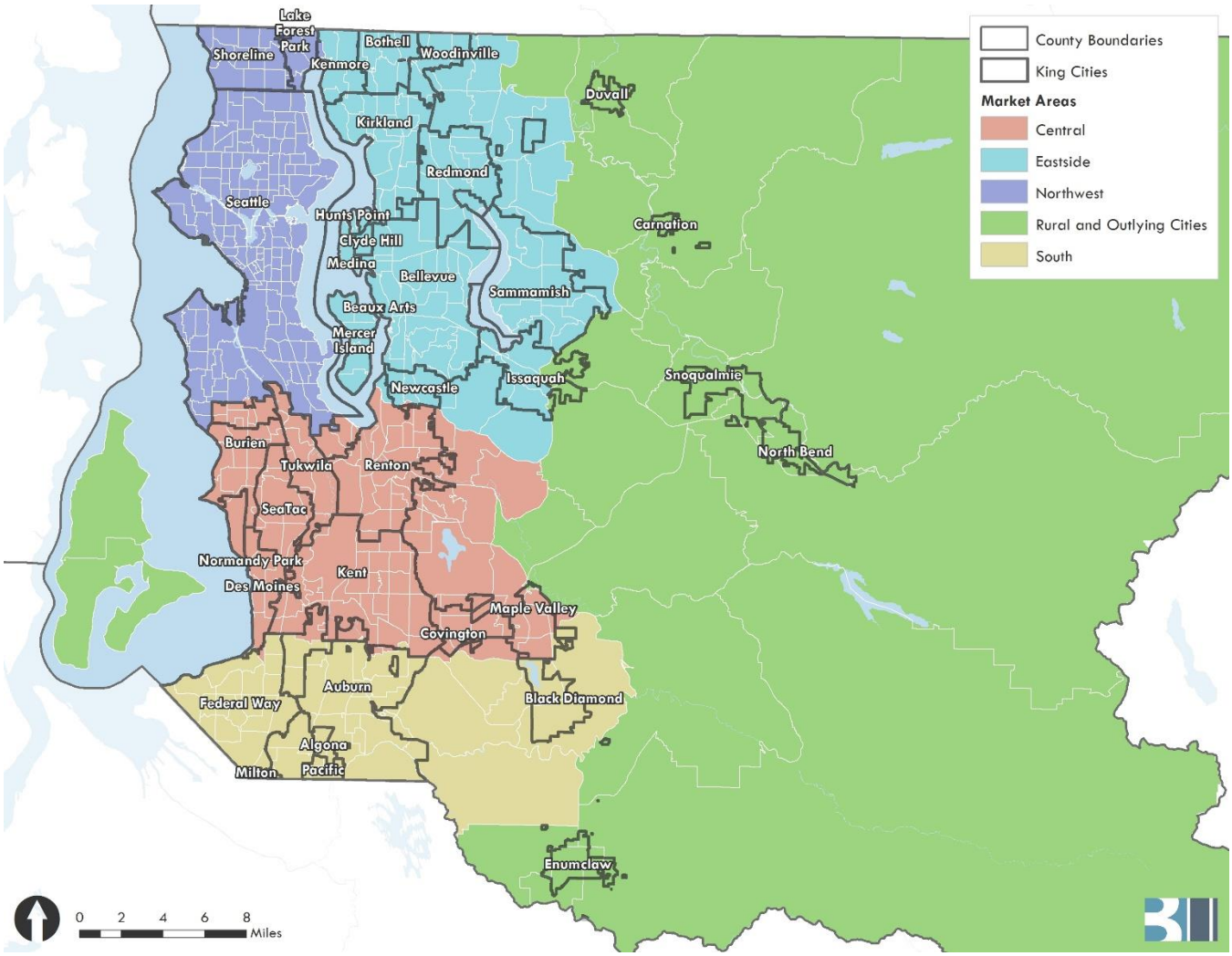
Jurisdictions have the discretion to choose whether to customize employment density assumptions for each zone or select broad assumptions. There is no single correct approach. The choice can depend upon local conditions, staff or consultant capacity for conducting analysis, and access to relevant data. This guidance provides several options for jurisdictions to choose from. Some of these options are grounded in new analysis of current employment density in market areas across King County. For a more detailed description of those findings, see Appendix A.

[1] Gross square footage simply refers to the total square footage of the building, including walls. Gross square footage capacity is calculated as the floor area ratio (FAR) * the parcel size in square feet.

## APPROACHES FOR DEVELOPING EMPLOYMENT DENSITY ASSUMPTIONS

This section describes three main approaches for developing and selecting appropriate square feet per job assumptions for use in land capacity analysis calculations. A jurisdiction may choose only one option or a combination of options, depending on their needs and circumstances. The primary options draw upon analysis BERK Consulting conducted to estimate aggregate employment densities in five different market areas across King County. Those market areas are shown in Exhibit 1 for reference.

**Exhibit 1. King County Market Areas**




*Source: BERK, 2020.*

### *1. Select a single average employment density for all non-residential development*

The simplest option is to assume the average square feet per job will follow recent trends in your city or market area. To support this option, BERK Consulting calculated average square feet per job in both 2006 and 2019 for most cities and the five market areas. The results for market areas are shown in Exhibit 2.[2] For most individual cities, see Exhibit 6 in Appendix A. Jurisdictions selecting this option can

[2] Details on the calculation of these densities are provided in Appendix A.

apply a single square feet per job assumption to all commercial and industrial zones. This option would be appropriate for jurisdictions that expect future job growth and non-residential development activity to be similar to the growth experienced in the past, or those that have limited non-residential zoning. It may also make sense in jurisdictions with very little diversity in the type of non-residential zoning available (for example: all commercial or all industrial).

The main limitation of this approach is that it does not allow for differentiating employment density assumptions by zone. A single employment density assumption would likely overestimate capacity in industrial areas (which tend to have lower relative employment densities) and underestimating capacity in some commercial zones where employment densities may be higher. This could significantly impact the accuracy of employment capacity estimates by zone and by these two different categories.

### 2. *Select separate commercial and industrial employment density assumptions*

Many cities select one assumed employment density for commercial zones and another for industrial zones. Others select unique employment density assumptions for each commercial and industrial zone. Either of these approaches is appropriate.

BERK conducted an analysis of recent non-residential development and job growth by market area to develop the recommended ranges shown in Exhibit 2. Jurisdictions should typically choose value within these ranges. When selecting density values, consider the types of uses that are expected to be most common:

- **Commercial and Mixed-Use:** Small-format commercial retail and food services are likely to have lower values for square feet per employee, with commercial office space and services at the middle of the range and large-format retail at the higher end.
- **Industrial:** Certain light manufacturing and flex space are likely to be at the lower end of this range, with heavy manufacturing and logistics in the mid-range and warehousing at the high end. Note that mini-warehouse/self-storage facilities tend to be at the highest end of the range.

Assumptions falling outside of the ranges shown in Exhibit 2 may be appropriate, but would require additional documentation of rationale to justify the variation.

For context, Exhibit 2 also shows the average employment density across all zones in 2006 and 2019. This average is affected by the proportion of total development in commercial or industrial zones, as well as differences in typical employer types and economic conditions. BERK's analysis in Appendix A indicates that employment density has increased somewhat in recent years in most market areas, primarily associated with redevelopment of lower-density commercial and industrial uses and shifts towards more intensive use of these spaces.

A benefit of this approach compared to Option 1 is that it does not presume the same mix of commercial and industrial development observed in the past will continue into the future, or that regional mixes of employment types would be applicable to a local area. This approach also allows jurisdictions to use different assumptions for zones in the city where alternative densities are more likely: differentiating between downtown and neighborhood commercial zones, for example.

**Exhibit 2. Recommended Square Foot per Job Assumptions by King County Market Area**

| Market Area | Average 2006 Employment Density (all zones) | Average 2019 Employment Density (all zones) | Recommended Range for LCA: Commercial and Mixed-Use Zones | Recommended Range for LCA: Industrial Zones |
|---|---|---|---|---|
| Central | 655 | 608 | 300–600 | 700–1,200 |
| Eastside | 398 | 386 | 200–400 | 500–800 |
| Northwest | 445 | 415 | 200–400 | 500–800 |
| Outlying Cities | 669 | 630 | 300–600 | 700–1,200 |
| South | 701 | 724 | 300–600 | 700–1,200 |

*Notes: See Exhibit 3 in Appendix A for a map of jurisdictions included in the average density analysis for each market area.*
*Sources: BERK, 2020 (See Appendix A for details)*

Appendix A includes an analysis that provides high-level city estimates for industrial and non-industrial uses using available real estate market data. Note that in this case, available real estate data for the entire county required aggregation of different non-industrial uses. These numbers can be helpful to see how a city compares to the market area as a whole and the ranges provided above.

In addition to the values in Appendix A, there are other sources of information that jurisdictions can use to help inform the selection of appropriate employment density assumptions from within the ranges shown in Exhibit 2. See the section below on using additional sources of information for more details.

### 3. *Select targeted employment density estimates for known pipeline development*

If a jurisdiction is aware of significant new growth within the development pipeline, such as through development agreements, master planned developments, or recent permit activity, consider applying targeted employment density assumptions for that portion of growth only. This may be particularly useful if this expected growth varies considerably from historic trends or other employment located within the market area.

## Additional Sources of Information to Inform Employment Density Assumptions

The main approaches outlined above can be refined with other methods and sources of data. This can provide a more detailed estimate of the land required to accommodate future employment growth in a community. Although not every situation will require a more precise estimate, local trends may require some adjustments to these estimates. Examples of cases like this would include:

- Districts in a city dominated by the campus of a single employer or small number of large employers, where expected future employment growth could be linked to their expected expansion plans.
- Districts where the general types of employment within a category are expected to shift over time. This would include jurisdictions where industrial districts are expected to reflect a greater focus on warehousing and logistics over manufacturing uses.
- Districts where specific new uses are expected with densities different than citywide averages. A recent shift in the types of manufacturing businesses located in an industrial area towards activities requiring less space per employee may require adjustments of required floor area estimates.
- Other broad trends with space utilization may also be relevant: a greater focus of local businesses on online transactions versus physical sales or trends towards increasing employment density in offices may be changing the space needs for current and future businesses in the community, and should be reflected in estimates of future needs.

To this end, this section provides additional sources which could be used for refining calculated densities from the general methods discussed above. Additionally, this section also describes a general framework for considering whether this refinement is necessary for a community, so as to understand when choices should be made to deviate from the broader estimates.

### *Other Sources for Density Assumptions*

#### ***Reference published employment density estimates by land use type***

This guidance document only provides aggregate employment density estimates based on broad employment and land use categories. Other sources of information, such as the Institute of Transportation Engineers (ITE) *Trip Generation Manual*, provide square feet per job estimates for a detailed list of land use types such as hospitals, schools, or airports. Jurisdictions looking to develop more targeted employment density assumptions may draw upon ITE or other resources to come up with estimated future densities of development.

There are several situations where this approach may make sense:

- Referencing employment density by specific land use types may also be useful for jurisdictions adjusting regional estimates to better reflect the local mix of employment growth expected.
- Employment density assumptions by land use type can also be useful to cities developing separate square feet per job assumptions for different zones. For example, if there is a downtown zone where the vast majority of floor area is expected to be office space, it may be appropriate to use an assumed density that is consistent with the office land use type.

### *Leverage space planning work by major employers*

Another source of information for use in determining employment density may be the programming coordinated by companies or other organizations with larger buildings or campuses and significant space needs. If these needs are identified through facilities planning or as part of subarea plans, the associated numbers could support assumptions about the development necessary to support expected employment growth.

### *Calculate previous densities achieved in the community*

If the same type and format of development will likely continue to be sited in the community, cities could also rely on available data to calculate local employment density across meaningful categories. This can use a range of information sources: County assessor's data, real estate listings websites, discussions with brokers, and other sources can all be used to identify the uptake of new space within a community, while surveys, business license data, and aggregate employment statistics can help to understand the new employment accompanying these uses. Average values for employment density may be aggregated or detailed as required.

### *Identify potential future changes in densities*

The most detailed consideration of future space usage would refine the calculation of previous densities described in Appendix A to focus on expected changes in the future. This would limit the calculations of employment densities to more recent tenants expected to be typical of future employers in an area, and even highlight expected trends that would impact the future use of space, such as the increase in telework or open-format offices. Establishing values in this way needs detailed documentation, especially if the resulting employment density estimates would vary significantly from the figures that would result from other methods.

## *Process for Evaluating Density Assumptions*

When determining the best estimates for employment density in a community, a structured process can include some consideration of the three main methods previously reviewed, as well as the additional sources of information discussed in this section, to determine what assumptions would be best for future projections. Steps in the process can include the following:

- **Select a starting estimate.** Based on assumptions from previous Buildable Lands reporting and/or the estimates provided in this report, select an initial estimate to be used for employment density. This could be an overall estimate for all employment lands or could be divided on broader categories of use.
- **Evaluate densities achieved from a selection of recent development, if possible.** An effective way of determining whether the estimates used have been accurate is to test these assumptions on recent development data. Tax assessment data from the King County Assessor or building permit data on file can determine the effective square footage of new construction, and a survey of current businesses or data from third-party providers can be used to determine employee counts for a representative set of projects. If there are significant and consistent differences between these calculations and broader estimates, there may be a need to examine changes to employment density estimates.

- **Assess the mix of land uses found in recent development and compare to previous expectations.** Additionally, estimates may also be affected by changes in the types of development coming into a community. Significant differences in expected versus actual uses may have substantive impacts on achieved employment density. For example, a significant rise in self-storage facilities or warehouses, more development of larger- or smaller-format retail spaces than expected, a greater proportion of restaurant versus service uses in commercial spaces, and other differences can all impact actual versus expected employment densities, and may point to the need to adjust these assumptions.
- **Identify potential new uses that could challenge employment density assumptions in the future.** Together with generally evaluating the mix of uses in new development, there may also be a need to consider new uses that are starting to become more popular and may require more consideration in the future. An increase in cannabis production or mini warehouse uses in industrial areas, for example, could suggest trends that may change how many employees can be accommodated in these areas. Combined with evaluating the mix of uses in recent development, this should highlight potential changes that could happen with employment densities into the future.
- **Review potential assumptions with other experts in the community.** After identifying potential trends that could impact achieved employment densities, reviewing this information and the resulting revised assumptions with experts from the community can be very useful in testing these conclusions. Discussing changes in space needs with local commercial brokers, developers, large space users, other businesses, and other real estate professionals can be essential in determining if new assumptions reflect their experiences, and whether there are other trends they have identified that should also be considered in these results.

Using some or all of the steps in this process can be useful in determining whether additional detail is required to adjust the starting assumptions to better reflect current and future projections. At minimum, generally establishing whether previous targets were reached and whether these trends will continue will be extremely useful in establishing whether previous assumptions can still be used.

However, beyond the use of currently published figures, either in this report or from other resources, evaluating existing plans and information to calculate alternative local employment densities can be a very data-intensive task. It may also come under scrutiny if calculated employment densities differ significantly from regional averages, especially if these estimates suggest that far less land would be needed to support growth. Refinements to these methods are best considered only if there are specific local situations that could lead to differences in these values, and the results should be thoroughly documented and reviewed to confirm.

## NOTES ON CALCULATING EMPLOYMENT DENSITY

If your jurisdiction is considering calculating achieved employment density in an area or specific building or campus, consider these tips for calculating square footage per job.

Generally, the calculation of total gross employment density is calculated as:

***Total gross square footage per employee*** =
(*gross square footage for employment / number of employees*) x (1 + *expected vacancy*)

These calculations include the following variables:

- The **total gross floor area for employment**, calculated as the total amount of building area supporting employment uses, which includes common areas and walls.
- The **number of employees**, which is the total number of employees supported by this gross floor area.
- The **expected vacancy rate**, which is estimated as a target or long-term average vacancy rate in the local market.

For some communities, this could be considered in aggregate across all employment lands. In other cases, however, these assessments can be created by land use categories: office, retail, industrial, warehouse/logistics, mini-warehouse, etc.

Considerations with these calculations include the following:

- **The amount of square footage per employee will change according to type.** Previous research and existing guidance highlight that employment densities vary by use category. Generally, office uses would have different densities of employment than retail spaces or self-storage warehouses, but specifically, medical offices may have different densities than office uses on average.
- **Not all building types are interchangeable.** In addition to different employment densities, building types may be limited in the businesses that can be practically accommodated. Most office spaces are interchangeable, for example, but medical offices have distinct layouts and amenities that would require tenant improvement to be used for other office uses, and manufacturing or industrial uses may have specialized construction dedicated to specific functions.
- **Businesses may not be using their full capacity with the space they occupy.** Whether owner-occupied or leased space, commercial businesses and other organizations may own or lease space to accommodate expected future growth. Because of this, available statistics may include some slack capacity that is not currently occupied, but can be used by the occupying businesses in the future.
- **Vacancies are necessary for the local real estate market to function.** Vacancies are necessary to provide the slack capacity necessary for the space market in a local area to function. Over the long term, some businesses will start, expand, or relocate while others will shut down, downsize, or move out of an area. Even in a market without significant expected long-term growth, natural vacancy rates provide some capacity for the short-term space needs that move around this trend.
- **Employment is not only included in commercial- and industrial-zoned lands.** In addition to the employment found on commercial and industrial lands, there are other employment types that will need to be considered. Certain communities, primarily in rural areas, may need to consider

agricultural and resource uses in the community, such as with aggregate mining. Additionally, home occupation uses, including contractors and self-employed individuals working from home, will also contribute to local employment but will not occupy employment floor space in the community. Note that the PSRC covered employment estimates exclude the self-employed (as well as other types of employees, such as the military and railroad workers).[3]

[3] See https://www.psrc.org/sites/default/files/emp_data_series.pdf for more details on the PSRC covered employment dataset, based on the Quarterly Census of Employment and Wages (QCEW) from the Washington State Employment Security Department (ESD).

## APPENDIX A: EMPLOYMENT DENSITY ESTIMATES BY CITY AND MARKET AREA 2006-2019

To support jurisdictions in selecting employment density assumptions, BERK Consulting estimated the average aggregate square foot per job in individual jurisdictions and market areas across King County. The analysis included summarizing non-residential square footage (all commercial, industrial, and public sector buildings that could reasonably accommodate employment) based on King County Assessor data obtained for the years 2006 and 2019. For each jurisdiction with employment data available, BERK calculated the gross square footage per job[4] in 2006 and 2019. The results were then aggregated by five separate market areas (shown in Exhibit 3) that group cities based on geography to reflect variation in local real estate market conditions. This analysis did not consider growth in unincorporated areas due to large variation in geographic context and lack of employment breakdowns for analysis by subarea.

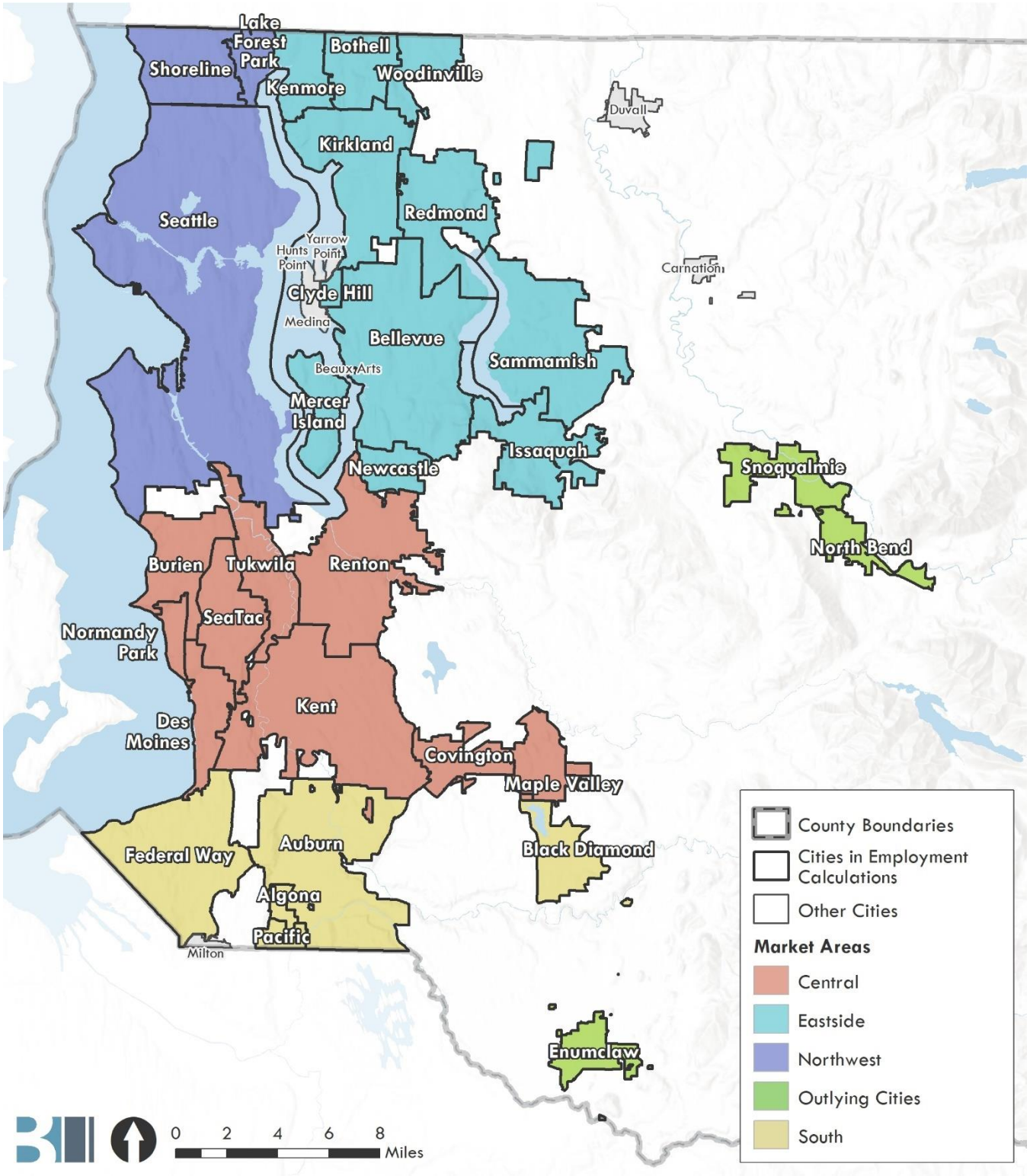
Exhibit 4 shows the total square feet per job in 2006 and 2019 for each of these market areas. While there was some variation between market areas, all areas except for South saw average square feet per job declines during this time period. In other words, employment density has been rising in most of King County. The different outcomes in the South appear to be due to strong gains in jobs associated with warehouse space, which typically require much more space per square foot.

Exhibit 5 adjusts the calculated employment density values on the basis of vacancy rates to determine the actual occupied space in the market and consider that future markets would normally have an average vacancy rate of around 5%. In most market areas, these estimates of square footage per job are somewhat different from the total aggregate square footage per job estimates shown in Exhibit 4. This step is important in cases where vacancy rates in employment areas are significantly higher or lower than expected.

Exhibit 6 provides gross employment density figures by jurisdiction, indicating the range of average densities found in communities across the region in 2006 and 2019. As noted previously, changes between 2006 and 2019 may be due to redevelopment as well as new development that supports employment uses at different densities than existing uses. For example, average densities may change with redevelopment of existing industrial areas for new office and retail uses, or development of new warehousing and distribution sites in communities that have not had these uses in the past.

[4] This analysis excluded construction and resource jobs, many of which are not tied to specific buildings and therefore not as relevant to employment capacity calculations.

**Exhibit 3. Cities Included in the Employment Density Calculations by Market Area**




*Note: Cities with suppressed job counts were not considered in this analysis and therefore not symbolized on this map. Additionally, the 2019 job counts for Enumclaw, North Bend, and Snoqualmie include their respective unincorporated UGAs.*
*Source: BERK, 2020.*

**Exhibit 4. Gross Floor Area Square Feet Per Job Calculations, 2006 and 2019**

| Market Area | 2006 Gross Non-Residential Square Feet | 2006 Jobs | 2006 Gross Square Feet Per Job | 2019 Gross Non-Residential Square Feet | 2019 Jobs | 2019 Gross Square Feet Per Job | Gross Sq. Ft. per job % Change 2006-2019 |
|---|---|---|---|---|---|---|---|
| Central | 142,770,591 | 217,835 | 655 | 158,657,104 | 257,486 | 616 | -6% |
| Eastside | 120,169,602 | 302,084 | 398 | 145,776,209 | 384,505 | 379 | -5% |
| Northwest | 230,626,549 | 517,954 | 445 | 273,932,690 | 667,153 | 411 | -8% |
| Outlying Cities | 7,889,576 | 9,735 | 669 | 9,041,389 | 14,947 | 605 | -10% |
| South | 51,643,062 | 73,648 | 701 | 58,459,588 | 79,845 | 731 | 4% |

*Notes: See Exhibit 3 for a map of jurisdictions included in the analysis for each market area. Job counts exclude resource and construction jobs, many of which are not tied to specific buildings and therefore less relevant to employment density assumptions. Gross non-residential square footage excludes agricultural uses.*
*Sources: King County Assessor, 2006 & 2019; PSRC, 2006 & 2019; BERK, 2020.*

**Exhibit 5. Adjusted Floor Area Per Job Estimates for Non-Residential Buildings in King County, 2006 & 2019**

| Market Area | Vacancy Rate, 2006 | Net Occupied Floor Area, 2006 (sf) | 2006 Adjusted Gross sf/ Job | Vacancy Rate, 2019 | Net Occupied Floor Area, 2019 (sf) | 2019 Adjusted Gross sf/job | Adj. Gross sf per job % Change 2006-2019 |
|---|---|---|---|---|---|---|---|
| Central | 6.2% | 133,925,953 | 647 | 6.3% | 148,675,986 | 608 | -6% |
| Eastside | 6.2% | 112,769,558 | 393 | 3.4% | 140,834,396 | 386 | -2% |
| Northwest | 6.0% | 216,680,562 | 440 | 4.1% | 262,816,501 | 415 | -6% |
| Outlying Cities | 8.2% | 7,239,633 | 646 | 1.1% | 8,943,923 | 630 | -3% |
| South | 5.0% | 49,080,533 | 701 | 6.0% | 54,967,212 | 724 | 3% |

*Notes: See Exhibit 3 for a map of jurisdictions included in each market area for calculation purposes. Occupied floor area calculations reflect total floor area exclusive of parking garages adjusted for commercial vacancy estimates from CoStar. This adjustment was made to account for variation in vacancy between 2006 and 2019. Job counts exclude resource and construction jobs, many of which are not tied to specific buildings and therefore less relevant to employment density assumptions. Gross non-residential square footage excludes agricultural uses.*
*Sources: King County Assessor, 2006 & 2019; PSRC, 2006 & 2019; CoStar, 2020; BERK, 2020.*

**Exhibit 6. Gross Floor Area Square Feet Per Job Calculations by City, 2019.**

| City | Market Area | Gross Square Feet Per Job, 2006 | Gross Square Feet Per Job, 2019 | Gross Sq. Ft. per job % Change 2006-2019 |
|---|---|---|---|---|
| Algona | South | 1,349 | 1,061 | -21% |
| Auburn | South | 840 | 799 | -5% |
| Bellevue | Eastside | 374 | 398 | 7% |
| Black Diamond | South | 484 | 762 | 57% |
| Bothell | Eastside | 494 | 389 | -21% |
| Burien | Central | 536 | 651 | 21% |
| Carnation | Outlying Cities | 479 | * | * |
| Clyde Hill | Eastside | 430 | 450 | 5% |
| Covington | Central | 616 | 585 | -5% |
| Des Moines | Central | 466 | 818 | 75% |
| Duvall | Outlying Cities | 547 | * | * |
| Enumclaw | Outlying Cities | 653 | 685 | 5% |
| Federal Way | South | 516 | 612 | 19% |
| Issaquah | Eastside | 420 | 346 | -18% |
| Kenmore | Eastside | 403 | 566 | 41% |
| Kent | Central | 908 | 831 | -8% |
| Kirkland | Eastside | 440 | 366 | -17% |
| Lake Forest Park | Northwest | 437 | 401 | -8% |
| Maple Valley | Central | 410 | 481 | 17% |
| Medina | Eastside | * | * | * |
| Mercer Island | Eastside | 332 | 340 | 2% |
| Milton | South | ** | ** | ** |
| Newcastle | Eastside | 454 | 258 | -43% |
| Normandy Park | Central | 493 | 534 | 8% |
| North Bend | Outlying Cities | 643 | 637 | -1% |
| Pacific | South | 294 | 554 | 89% |
| Redmond | Eastside | 361 | 327 | -10% |
| Renton | Central | 558 | 493 | -12% |
| Sammamish | Eastside | 377 | 373 | -1% |
| SeaTac | Central | 422 | 375 | -11% |

**Exhibit 6. (continued)**

| City | Market Area | Gross Square Feet Per Job, 2006 | Gross Square Feet Per Job, 2019 | Gross Sq. Ft. per job % Change 2006-2019 |
|---|---|---|---|---|
| Seattle | Northwest | 444 | 408 | -8% |
| Shoreline | Northwest | 491 | 503 | 2% |
| Skykomish | Outlying Cities | ** | ** | ** |
| Snoqualmie | Outlying Cities | 865 | 509 | -41% |
| Tukwila | Central | 655 | 630 | -4% |
| Woodinville | Eastside | 671 | 657 | -2% |
| Yarrow Point | Eastside | * | * | * |

* *Employment statistics are suppressed for these communities in PSRC statistics.*
** *Densities for Milton and Skykomish not included due to significant variance given the small sample size (<100 jobs).*

*Notes: Job counts exclude resource and construction jobs, many of which are not tied to specific buildings and therefore less relevant to employment density assumptions. Gross non-residential square footage excludes parking garages and agricultural uses.*
*Sources: King County Assessor, 2006 & 2019; PSRC, 2006 & 2019; BERK, 2020.*

The analysis described above aggregates all commercial and industrial zones together when measuring employment density. BERK also analyzed assessor data in to help estimate aggregate employment density separately for different types of employment. Exhibit 7 provides estimates of the job densities by city for:

- **Non-industrial employment**, including spaces typically associated with employment in the Finance, Insurance, and Real Estate (FIRE); Retail; Services; Government; and Education major sector categories. This would include both commercial space as well as other public facility uses that may be accommodated elsewhere in land capacity studies but are difficult to distinguish without detailed analysis of individual buildings.
- **Industrial employment**, including Manufacturing and Wholesale Trade, Transportation, and Utilities (WTU) major sector categories.

The allocation of floor space to these categories is based on a classification of both site and building use for non-residential space as recorded in the King County Assessor's tax assessment database. Of course, there may be situations where jobs categorized as non-industrial are located in buildings classified as industrial. The opposite is also true. In most cases we expect this uncertainty would have a minor impact on aggregate calculations by city. However, there are some cases where the calculations in Exhibit 7 may be less reliable for an individual city, and surrounding market area characteristics should be used as a better guide.

Note as well that the non-industrial employment types include a wide range of uses, from recreation to education to government. Each of these types may have very different employment densities. Therefore, care should be used when interpreting these calculations and their relevance to land capacity assumptions.

**Exhibit 7. Gross Floor Area Square Feet Per Job Calculations, by City and Job Type, 2019.**

| City | Market Area | Non-Industrial Employment (jobs) | Non-Industrial Empl. Density (sf per job) | Industrial Employment (jobs) | Industrial Empl. Density (sf per job) |
|---|---|---|---|---|---|
| Algona | South | 288 | 1,745 | 2,146 | 968 |
| Auburn | South | 25,332 | 699 | 17,117 | 1,085 |
| Bellevue | Eastside | 129,270 | 438 | 12,734 | 321 |
| Black Diamond | South | 346 | 861 | 42 | ** |
| Bothell | Eastside | 13,784 | 366 | 2,270 | 686 |
| Burien | Central | 11,198 | 631 | 509 | 2,707 |
| Carnation | Outlying Cities | * | * | * | * |
| Clyde Hill | Eastside | * | * | * | * |
| Covington | Central | 4,795 | 574 | 84 | ** |
| Des Moines | Central | 6,082 | 699 | 454 | 3,509 |
| Duvall | Outlying Cities | 1,177 | 564 | 111 | 1,413 |
| Enumclaw | Outlying Cities | 4,148 | 661 | 689 | 1,225 |
| Federal Way | South | 26,612 | 625 | 1,952 | 1,130 |
| Issaquah | Eastside | 24,093 | 369 | 2,988 | 384 |
| Kenmore | Eastside | 3,108 | 627 | 448 | 752 |
| Kent | Central | 34,106 | 679 | 35,339 | 1,090 |
| Kirkland | Eastside | 42,275 | 361 | 4,427 | 754 |
| Lake Forest Park | Northwest | 1,455 | 465 | 73 | ** |
| Maple Valley | Central | 3,634 | 506 | 370 | 770 |
| Medina | Eastside | 465 | 528 | 21 | ** |
| Mercer Island | Eastside | 6,306 | 382 | 185 | 421 |
| Milton | South | * | * | * | * |
| Newcastle | Eastside | 2,693 | 236 | 127 | 1,228 |
| Normandy Park | Central | 830 | 581 | 110 | *** |
| North Bend | Outlying Cities | 2,649 | 600 | 405 | 1,442 |
| Pacific | South | 556 | 571 | 134 | 1,108 |
| Redmond | Eastside | 80,377 | 295 | 11,852 | 726 |
| Renton | Central | 41,308 | 565 | 24,150 | 454 |
| Sammamish | Eastside | 6,884 | 430 | 539 | 262 |
| SeaTac | Central | 15,809 | 685 | 19,821 | 166 |

**Exhibit 7. (continued)**

| City | Market Area | Non-Industrial Employment | Non-Industrial Empl. Density (sf per job) | Industrial Employment | Industrial Empl. Density (sf per job) |
|---|---|---|---|---|---|
| Seattle | Northwest | 537,538 | 425 | 57,858 | 628 |
| Shoreline | Northwest | 15,628 | 507 | 430 | 2,350 |
| Skykomish | Outlying Cities | 60 | ** | - | - |
| Snoqualmie | Outlying Cities | 3,548 | 633 | 1,298 | 736 |
| Tukwila | Central | 29,329 | 565 | 13,867 | 875 |
| Woodinville | Eastside | 8,206 | 452 | 3,839 | 1,277 |
| Yarrow Point | Eastside | * | - | * | - |
| | **Central** | 147,091 | 614 | 94,704 | 723 |
| | **Eastside** | 317,461 | 383 | 39,430 | 618 |
| | **Northwest** | 554,621 | 427 | 58,361 | 640 |
| | **Outlying Cities** | 11,582 | 635 | 2,503 | 1,015 |
| | **South** | 53,134 | 667 | 21,391 | 1,077 |
| **King County** | | **1,113,508** | **455** | **221,136** | **725** |

* *Employment statistics are suppressed for these communities in PSRC statistics.*
** *Densities are not included due to significant variance given the small sample size (<100 jobs).*
*** *No industrial space was recorded with the classification system used.*

*Sources: King County Assessor, 2019; PSRC, 2019; BERK, 2020.*

# Appendix G: Approach for Identifying Infrastructure Gaps

# King County Urban Growth Capacity Study

## Recommended Infrastructure Approach

April 5, 2020

Prepared by:

cai community attributes inc

Prepared for:

King County

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# INTRODUCTION

## Background and Purpose

King County is in the process of beginning its Urban Growth Capacity Study, also known as the buildable lands or review and evaluation program. The purpose of this study is to review how actual recent growth compares with planning assumptions developed for the existing comprehensive plan, recalculate the quantity and capacity of buildable land available during the current planning period, and identify any issues to be addressed during the next comprehensive plan update. The Study must be complete and delivered to the Department of Commerce by June 30, 2021, but King County will complete its report in November 2020 to allow for a longer comprehensive plan update process.

King County completed Urban Growth Capacity Studies in 2007 and 2014. In 2017, several significant changes were made to the State legal requirements for the program. The County has identified two changes that will require additional analysis before the study can move forward. First, the County must include infrastructure gaps in the process of identifying lands available for development. Second, it must address several specific considerations in developing market supply factors applied to buildable lands.

This report recommends an approach to addressing infrastructure gaps in the Urban Growth Capacity Study. These methods reflect both state requirements and King County jurisdictions' infrastructure needs. A second report will recommend updated methods for market factors.

## Methods and Approach

The recommendations in this report were developed in partnership with King County staff from the following resources:

- Washington State Department of Commerce "Buildable Lands Guidelines" (2018)
- King County cities' comprehensive plans

## Organization of Report

This report includes the following sections:

- **Regulatory Context** explains how State requirements have changed and how King County's existing methods may need to be updated for consistency

- **Existing Infrastructure Conditions** outlines known infrastructure gaps identified within individual Comprehensive Plans to prepare for interjurisdictional coordination
- **Recommended Approaches** identifies how King County's methods could be updated to accommodate any infrastructure gaps

# Regulatory Context

## State Requirements and Recent Changes

The purpose of the Urban Growth Capacity Study is to review how actual recent growth compares with planning assumptions, recalculate the quantity and capacity of buildable land available during the current 20-year planning period, and identify any issues to be addressed during the next comprehensive plan update. King County's study fulfills the requirements for the "Review and Evaluation Program" as established under RCW 36.70A.215. In general, the State program is structured to allow for counties to use unique approaches to suit local conditions. State law sets basic requirements, and counties may meet those requirements as they see fit, provided their rationale is sound and well-documented.

In 2017, E2SSB 5254 was passed by the Washington State Legislature. This bill included the first revisions to the state review and evaluation requirements since the program began in 1997. These revisions included adding the requirement for counties to incorporate infrastructure gaps into their evaluation and identification of land suitable for development or redevelopment during the planning period. This will entail identifying lands that would otherwise be considered vacant or redevelopable and part of the land supply, but which have infrastructure gaps significant enough that they are deemed unlikely to be developed during the planning period, or that infrastructure development will unlock their capacity at a specific point partway through the planning period.

RCW 36.70A.215(3)(b) clarifies that infrastructure gaps include but are not limited to transportation, water, sewer, and stormwater. This report focuses on top ranking infrastructure systems and challenges that affect most or all cities in King County.

In some cases, infrastructure challenges may not warrant removing land from the developable supply for the 20-year planning period. Per the Department of Commerce's 2018 guidelines, jurisdictions should consider the following factors when evaluating whether or not an infrastructure gap exists:

- Is there a long-term lack of urban development in the area?
- How did the recent comprehensive plan address the needed infrastructure provision, and is that information still valid?
- If the infrastructure is anticipated to be provided later in the planning period, is development likely to occur quickly so that planned development is realized within the planning period, or will some of the area remain undeveloped?

## King County's Current Methods

King County's past methods for quantifying its developable land informally addressed infrastructure gaps in land supply identification. The County has identified the following steps to update its process to meet new requirements:

1. Assemble necessary data for the entire jurisdiction, including parcel/assessor data, critical areas, and zoning.
2. Define vacant and redevelopable lands using a density and/or value threshold.
3. Exclude land uses or parcels that are unlikely to develop for categorical reasons (parks, schools, public facilities, other institutions, etc.).
4. Apply vacant and redevelopable land definitions established in Step 2 to the remaining parcel data.
5. Review and refine the resulting developable land supply.
6. Identify and remove environmentally sensitive lands.
7. Adjust for infrastructure gaps (New step to be defined).
8. Summarize developable land supply by zone.

This report will provide recommendations on how to accomplish step seven, adjusting for infrastructure gaps. This will include accommodating any lands which should be entirely removed from the land supply and adjusting for lands that will become "unlocked" at some point during the planning period.

## Existing Conditions

This section discusses the Capital Facilities Elements of King County cities to assess high-level infrastructure challenges, summarized in **Exhibit 1**. Most plans were developed in 2014 or 2015, and individual jurisdictions should review these findings for the County's Buildable Lands needs. This review focuses on infrastructure systems most likely to prevent development, including water, sewer service, and stormwater facilities. Site-specific infrastructure issues independent of system capacity might also limit development capacity; cities should identify site-specific concerns, as outlined in the subsequent section of this report, *Recommended Approach*.

### Water

In King County, 18 cities acquire all their potable water through agreements with utility districts or other cities. Another 11 cities have their own water system and supply, but also have areas within their limits served by outside water districts or other cities. This leaves 10 out of 39 cities providing all their own water needs. These 10 cities are generally either very large, with systems that serve many other jurisdictions (Seattle and Bellevue), or very small (Five out of 10 have a population under 10,000). Overall, all indicate that these providers had sufficient water supply to accommodate growth through 2035, though Redmond and Woodinville cited a potential need for additional sources. Several cities with sufficient water rights still face other challenges such as in storing water and managing water quality over time, including Bothell, Black Diamond, and Milton. SeaTac's plan notes concerns about Seattle Public Utilities' ability to supply water to regional cities as Seattle continues to grow.

### Sewer

Twenty cities receive sewer service from utility districts or another jurisdiction such as the City of Bellevue or King County. Another 8 cities have their own utility, but also have areas within their limits served by utility districts. At least 20 cities report having parcels with septic systems, and Burien reports areas that do not have access to sewer. Auburn and Kenmore are working to provide sewer to all remaining parcels on septic. Most of the sewer providers have capacity for growth through 2035, though Milton and Woodinville expressed capacity concerns.

### Stormwater

All jurisdictions except Carnation have public stormwater infrastructure, though some such as Mercer Island rely heavily on natural systems. At the time of the plan update, Enumclaw did not have a public stormwater utility to fund expansion of its system. A common concern was the need for

additional capacity in stormwater pipes and drainage swales. Some communities require that new development install onsite stormwater detention and treatment, and require the use of low impact development techniques in all development. Numerous communities possess natural conditions that make stormwater management difficult, such as flat topography, high water table, and the presence of rivers, streams, and wetlands. Depending on the use and circumstances, such natural conditions can create site-specific infrastructure gaps that could impact land capacity.

## Funding Concerns

Several plans note that the gap between projected future revenues and the cost of required future capital facilities will continue to widen without additional taxes or other revenue increases. One plan notes that cuts in services or increases in operating revenues may be necessary. Another states that funding to maintain the system has not changed over the years and that there is no dedicated fund to cover basic operation and maintenance expenses. Multiple plans cite the need to replace aging infrastructure as a future funding concern.

Awareness of the need for future funding does not necessarily limit anticipated growth. Funding concerns therefore, are only presented herein as prohibitive to redevelopment if the city cites the concern in their plan as critical and imminent.

**Exhibit 1** summarizes high level water, sewer, and stormwater issues identified in individual cities' last comprehensive plan updates. These are described in greater detail in **Appendix A**. Cities in Exhibit 1 are grouped by geographic area within King County.

**Exhibit 1. Infrastructure Issues Identified in 2015-Era Comprehensive Plans**

| Jurisdiction | Water | Sewer | Stormwater |
|---|---|---|---|
| **North King County** | | | |
| Shoreline | No issues | No issues | No issues |
| Lake Forest Park | No issues | No issues | **Infrastructure improvements required** |
| Kenmore | No issues | No issues | No issues |
| Bothell | **Additional storage required** | No issues | No issues |

| Jurisdiction | Water | Sewer | Stormwater |
|---|---|---|---|
| Woodinville | **Projected deficiencies** | **Projected deficiencies** | **Areas of insufficient capacity** |
| Seattle | **Potential reduction in supply by 4% (2025) and 6% (2050) from climate change impacts** | **Need to reduce combined sewer overflow conditions** | **Need to reduce combined sewer overflow conditions** |
| **Eastside King County** | | | |
| Kirkland | No issues | **Aging Infrastructure** | No issues |
| Mercer Island | No issues | No issues | No issues |
| Bellevue | No issues | No issues | No issues |
| Newcastle | No issues | No issues | No issues |
| Redmond | **Potential Capacity Issues** | **Potential annexation areas unsewered** | No issues |
| Issaquah | No issues | No issues | No issues |
| Sammamish | No issues | No issues | No issues |
| Medina | No issues | No issues | No issues |
| Hunts Point | No issues | No issues | No issues |
| Clyde Hill | No issues | No issues | **Infrastructure improvements required** |
| Yarrow Point | No issues | No issues | **Infrastructure improvements required** |
| Beaux Arts Village | No issues | No issues | No issues |
| **Rural East King County** | | | |
| Duvall | No issues | No issues | No issues |
| Carnation | No issues | No issues | **On-site infiltration required, may limit** |

| Jurisdiction | Water | Sewer | Stormwater |
|---|---|---|---|
| | | | **potential on specific sites** |
| Snoqualmie | **Aging Infrastructure** | No issues | No issues |
| North Bend | **Aging Infrastructure** | **Unsewered area; expansion of wastewater treatment facility required** | **Concern about system being undersized in some areas for storm events** |
| Skykomish | **Limited or no dedicated funds to cover basic operation and maintenance expenses of services** | **Limited or no dedicated funds to cover basic operation and maintenance expenses of services** | **Limited or no dedicated funds to cover basic operation and maintenance expenses of services** |
| Enumclaw | No issues | **Infrastructure improvements required** | **No stormwater utility to fund repair and maintenance of existing system** |
| **Central King County** | | | |
| Burien | No issues | **Unsewered areas** | **Runoff issues in Salmon Creek basin** |
| Normandy Park | **Aging Infrastructure** | No issues | No issues |
| Des Moines | No issues | No issues | **On-site infiltration required, may limit potential on specific sites** |
| SeaTac | **Dependent on Seattle's capacity** | No issues | **Aging infrastructure** |
| Kent | **Additional storage required** | No issues | No issues |
| Tukwila | No issues | No issues | No issues |
| Renton | **Infrastructure improvements required** | **Potential capacity issues closer to 2030** | No issues |
| Covington | **Capacity limitations for area served by District 111** | **Infrastructure improvements required** | **Funding gaps** |
| Maple Valley | No issues | **Infrastructure improvements required** | **Infrastructure improvements required** |

| Jurisdiction | Water | Sewer | Stormwater |
|---|---|---|---|
| **South King County** | | | |
| Federal Way | No issues | No issues | No issues |
| Milton | **Aquifer constraints** | **Infrastructure improvements required** | **Infrastructure improvements required** |
| Pacific | **Aging Infrastructure** | **Potential capacity issues for commercial and industrial** | **On-site infiltration required, may limit potential on specific sites with topography challenges** |
| Auburn | No issues | No issues | No issues |
| Algona | No issues | No issues | **Infrastructure improvements required** |
| Black Diamond | **Infrastructure improvements required** | **Infrastructure improvements required** | No issues |

## Recommended Approach

This section proposes a process for King County and its cities to identify developable parcels with infrastructure gaps, make decisions about those gaps' impact on development potential, and adjust the land supply accordingly. At the beginning of the infrastructure evaluation process, each jurisdiction will have identified a set of vacant and redevelopable parcels. Environmentally sensitive areas and parcels or land uses unlikely to develop for categorical reasons will have already been excluded from this group. This potentially developable land supply will then be evaluated for infrastructure gaps.

An **infrastructure gap** exists for a property when one or more critical types of infrastructure is not available – transportation, water, sewer, or stormwater. Additional types of infrastructure may be critical in certain cases, and this should be assessed by each city. A gap may be temporary, meaning that a project has been identified in the CIP or TIP to address the gap and funding has also been identified. Or a gap may be long-term, meaning that there is no project funded within the planning period.

The infrastructure evaluation process includes the following steps to identify parcels which have long term infrastructure gaps significant enough to be wholly or partially removed from the buildable lands supply:

1. Identify system capacity issues
2. Identify site-specific infrastructure gaps
3. Update developable land supply

In some cases, this process will require the jurisdictions to work together with service providers to make informed decisions about whether or not lands with infrastructure gaps should be considered part of the buildable land supply. In determining whether there is an infrastructure gap, the Department of Commerce recommends that jurisdictions consider the following:

- Has there been a long-term lack of urban development in the area?
- How did the comprehensive plan address how the needed infrastructure would be provided, and is that analysis still valid?
- If the infrastructure is anticipated to be provided later in the planning period, is development likely to occur quickly enough for the planned development to be realized within the planning period, or will some of the area remain undeveloped?

The proposed approach adds additional rigor to Commerce's guidance through a stepwise scan of infrastructure capacity. Cities and King County

should use professional judgement and the best information available to make informed decisions, and clearly document their rationale.

## Step 1. Identify System Capacity Issues

1.1. Each jurisdiction will verify and update the data provided in the most recent Comprehensive Plan, documenting major changes in policy, service provision and other relevant details.

1.2. Each jurisdiction will list the providers serving their jurisdiction with essential infrastructure: water, sewer, stormwater.

1.3. Each jurisdiction will collaborate with service providers, drawing from sewer and water district and comprehensive plans, to identify out-of-date planning information and any underserved portions of each city or the unincorporated urban area. Jurisdictions are advised to coordinate with public works staff to review, interpret and verify data.

1.4. Document any future capital facilities investments planned to address these issues. Determine if specific investments will resolve infrastructure gaps to "unlock" development potential and when it is expected to occur.

1.5. Document if funding has been identified for capital facilities investments.

1.6. Evaluate each system-wide capacity issue to determine if the issue is expected to stop or delay future development, or limit the types or densities of development that will be feasible.

1.7. Using GIS, overlay the service areas of providers with system capacity issues on the set of vacant and redevelopable parcels. Update data for impacted parcels to note system capacity issues.

## Step 2. Identify and Document Site-Specific Infrastructure Gaps

2.1. Individual jurisdictions will review remaining vacant and redevelopable parcels to identify site-specific gaps. This review is best done with GIS data. **Appendix B** outlines a suggested process for assigning tiers to sites based on infrastructure availability, and using these tiers to identify site-specific gaps.

2.2. Draw from code or adopted policy to determine if the issues are expected to stop or delay future development, or limit the types or densities of development feasible on vacant or redevelopable parcels. Review parcels with multiple gaps, regardless of severity, to consider if their combined impact will stop or delay development. **Appendix B** provides additional guidance on evaluating multiple gaps.

2.3. Update parcel data to note identified site-specific infrastructure gaps, by documenting infrastructure constrained parcels in the developable land supply.

## Step 3. Update Developable Land Supply

3.1. Update developable land supply by removing the developable area of fully constrained parcels from consideration. For partially constrained parcels, document the expected development to accurately convey capacity limitations due to infrastructure gaps.

3.2. Summarize developable land supply by zone.

# Appendix A. Summary of Infrastructure by City

## North King County Jurisdictions

Except for Seattle, North King County's cities are all currently midsize, between 12,400 and 56,400 in population. Woodinville is projected to grow by the largest percentage, while Shoreline and Kenmore will grow the most in absolute terms. There are several utility districts that serve all of these communities in various iterations, particularly the Northshore Utility District, Alderwood Water & Wastewater District, and Woodinville Water District. Seattle, on the other hand, serves as a regional utility provider. Seattle Public Utilities serves communities throughout King County.

### Bothell

The City of Bothell's 2015 Comprehensive Plan, called Imagine Bothell, contains a Capital Facilities Element that inventories all of the City's capital facilities. The Element outlines planned improvements to ensure that the facilities have adequate capacity to meet level of service (LOS) standards. The Element also references relevant capital facilities plans, master plans and strategic plans to identify funding sources and other detail.

The City has contracted with Seattle Public Utilities for potable water, and has **sufficient supply to serve growth**. At the time the Plan was updated, the City had identified a **deficiency for water storage**. As of 2015, a project to address this deficiency was underway. In addition to the City water and sewer systems, certain areas are served by the Alderwood Water & Wastewater District, Northshore Utility District, and Woodinville Water District.

### Kenmore

Kenmore's utilities and capital facilities elements were last updated in 2015. The City's water is provided by the Northshore Utility District, and it accounts for 31% of the District's connections. The District purchases water from Seattle Public Utilities and has **sufficient capacity to meet growth needs to 2026 and beyond**. At the same time, average day and peak season demands at build out **slightly exceed the SPU supply contract amount**. The city believes this shortfall may be eliminated as conservation measures and water-use habits decrease demand. The District has additional sources for water that it is not yet using.

The Northshore Utility District also provides sewer service. Its policy is to provide public sewer service to areas within its service area, which encompasses Kenmore. It set a goal in 2006 to **provide sewer to the majority of parcels on septic within eight years**. As of 2014, 877 parcels

in the District were on septic systems, and 550 of these had sewer service available but not yet connected.

## Lake Forest Park

The Lake Forest Park 2015-2035 Comprehensive Plan was adopted in 2016. Water service is provided by four public water utilities: Lake Forest Park Water District, North City Water Utility District, Northshore Utility District, Seattle Public Utilities. These districts have capital improvement plans that address issues of **aging pump stations and main infrastructure, meter replacements, and reservoir upgrades**, as well as the need for an I-405 transmission main replacement by 2026.

The City owns and operates its sewer utility, though portions of the City are served by the Northshore Utility District. Lake Forest Park manages the City's stormwater drainage system, and has identified $8.7 million dollars in funding for required future projects.

## Seattle

The City of Seattle's Comprehensive Plan was updated in 2016. The Capital Facilities Appendix identifies necessary upgrades to police and fire facilities, a need for continuing acquisition of land for parks and open space, demand for new government office and warehousing space, a need for expanding school capacity, and other facility needs that will be necessary to serve a growing city.

The City's utilities will also be taxed by growth. Specifically, Seattle City Light will require **additional resources** to "meet load growth and comply with I-937 over the next twenty years." While maintenance to the water system will be required in perpetuity, particularly for distribution and storage systems and to meet fire flow requirements, Seattle Public Utilities nonetheless indicates that the **water supply is currently sufficient to meet levels of service for anticipated growth in the next twenty years**. Outside of general maintenance, the **sewer system has adequate capacity** to serve the City's full buildout.

## Shoreline

Shoreline's capital facilities and utilities elements were last updated in 2012. The elements **do not identify any specific utility gaps.**

## Woodinville

Woodinville's Comprehensive Plan was updated in 2015. The Capital Facilities Element indicates that the Woodinville Water District "**projects a deficit** of 200 gpm of source availability for the West service area in 2027 [and] an additional storage capacity deficit of over 900,000 gallons […] in the

West area". The Plan identifies **general deficiencies for the sanitary sewer system**, indicating that the latest Woodinville Water District plans do not include improvements that would be required to meet the current level of service standard. There are also **deficiencies identified for the stormwater system**, with the Comprehensive Plan indicating that "There are areas of insufficient capacity located throughout the City [and] some of the more significant problem areas are within the Woodin Creek basin and in areas upstream of Lake Leota."

## Eastside King County Jurisdictions

East King County's large cities are projected to accommodate strong growth, particularly Bellevue and Redmond. More East King County communities own their own utilities compared to other regions, or have service provided by the City of Bellevue.

### Bellevue

The City of Bellevue's Comprehensive Plan was last updated in 2015. The Plan indicates that the City has little vacant land, so the focus of the Capital Facilities Element is maintaining and upgrading existing facilities to accommodate anticipated population growth in areas that have already been developed. The Plan provides a detailed inventory of the City's capital facilities and references to several more specific functional plans, which contain detailed information about planned improvements and available funding. While the City anticipates increased demand for services and facilities, the **Plan does not indicate any gaps that would preclude growth.**

### Issaquah

The City of Issaquah's Comprehensive Plan was last updated in 2015. It identifies City-managed utilities and capital facilities and provides policy language that requires the City to meet minimum levels of service and provide utilities to serve new growth. **No capacity shortfalls** are identified for water, sewer, or stormwater, though the Capital Facilities Element, indicates that imminent growth may exceed the capacity of police services and parks provision.

### Kirkland

Kirkland's capital facilities element was last updated in 2015. The most significant potential gap noted was a need to **replace and/or rehabilitate aging sewer pipelines** to maintain level of service. In addition, some **portions of the city are currently on septic systems** and may need to join the City's system as they become more urbanized. Portions of north

Kirkland have sewer and water service through the Northshore Utility District or Woodinville Water District.

## Mercer Island

The City of Mercer Island Comprehensive Plan includes a Capital Facilities Element that identifies capital needs for streets, parks and open spaces, pedestrian and bicycle facilities, stormwater, sewer, water, and schools. The City owns and operates its water, sewer, and stormwater systems. There are **no deficiencies identified for the water system**.

## Newcastle

The City of Newcastle's Comprehensive Plan includes a Capital Facilities Element that references several other related plans and advances goals and policies related to level of service, facility financing and other policy issues. The Plan also includes a Capital Facilities Appendix. The Appendix provides a detailed inventory of the City's capital facilities and a comprehensive list of funding mechanisms for capital facility needs. The Appendix also provides a list of needed improvements and anticipated funding levels and sources. Beyond these improvements, **no other gaps are indicated**.

## Redmond

The Redmond 2030 Comprehensive Plan was adopted in December 2011. The City of Redmond provides water service to most areas within the City limits. Water is sourced from City wells and the Cascade Water Alliance (CWA). Redmond's well system draws from a shallow aquifer which is **susceptible to contamination**, especially as urbanization of the Aquifer Recharge zone continues. The City has implemented a Wellhead Protection Program to preserve water quality, in addition to implementing conservation measures to decrease demand for a new water supply.

A majority of Redmond is served by a sanitary sewer, however, **some areas still have on-site disposal** such as septic tank systems. King County provides wastewater treatment through the Brightwater facility which has sufficient capacity to meet Redmond's future needs. Most of the **proposed annexation areas lack sewer**. The City manages most stormwater facilities, although there are also some private facilities.

## Sammamish

The City of Sammamish's Comprehensive Plan was updated in 2015. The Capital Facilities Element does not contain an inventory of capital facilities but does detail the required levels of service for each type of facility. **No gaps in service provision** are indicated in the Element. Additional background information is contained in another section of the Comprehensive Plan, including an inventory and forecast of future needs. This section identifies

needed improvements to parks, stormwater facilities, transportation facilities, and water and sewer facilities. These capital improvements are **not anticipated to hinder growth** or preclude the City from reaching the buildout envisioned in the Land Use Element.

## Beaux Arts Village

The Town of Beaux Arts Village's Comprehensive Plan was **last updated in 2015**. The capital facilities element notes that urban facilities and services are in place and **there are adequate water, sewage and drainage systems to meet the foreseeable needs of a stable population**. The Town's water supply comes from a well within its limits. The Town operates the well and maintains the water delivery system. The City of Bellevue provides sewer service to all Beaux Arts residences. The Town manages and maintains a system of stormwater catch basins, storage and transmittal pipes, and outfalls. No future projects were identified in the Plan. The Transportation element notes that the only local transportation issues relate to road surface maintenance, all addressed in the Town's Capital Improvement Plan.

## Clyde Hill

The Clyde Hill Comprehensive Plan was last updated in 2015. Potable water and sanitary sewer service are provided by the City of Bellevue. The Plan states that **all future needs can be accommodated** by the existing systems.

The City owns and maintains a storm drainage system but indicates that as remaining vacant parcels are developed and surface water runoff has increased, **existing underground development has made installation of new stormwater infrastructure more difficult**. The City indicates that a long-term goal is to develop a system able to collect and treat storm water generated by a 10-year average storm event.

While no immediate infrastructure deficiencies were identified in the City's Capital Facilities element, the Plan notes that due to a range of circumstances, there is a **growing gap between operating revenues and expenses** in the City, and that it may be necessary to initiate cuts in services or increases in operating revenues in the future.

## Hunts Point

The Hunts Point Comprehensive Plan was last updated in 2015. The City of Bellevue provides both potable water and sanitary sewer service. The Town provides a stormwater system that connects non-shoreline properties to drainage pipes that discharge to Lake Washington. Properties along the lakeshore have private systems that discharge directly to the Lake.

The Plan **does not identify any water, sewer, or stormwater projec**ts in the six-year plan contained in its capital facilities element.

### Medina

The Medina Comprehensive Plan was last updated in 2015. Water and sewer services are provided by the City of Bellevue, and King County maintains a sewage pumping station at the corner of NE 8th Street and 82nd Avenue. Bellevue has **adequate capacity to continue water and sewer service**. Non-potable water used at the golf course is pumped from Lake Washington under a "grandfathered" water use rights agreement with the State Department of Natural Resources.

Medina operates and maintains its own storm drainage system. **A range of deficiencies** have been identified in the system, attributed to poor on-site management of stormwater runoff on individual properties. The City adopted requirements for property owners to implement best management practices to control runoff and to better manage private stormwater facilities. In addition, the **City identified a number of upgrades to the municipal stormwater system** to increase flow capacity of individual sections of the system, recondition some of the open ditches, correct old or undersized lines, and to install pollution control devices (e.g., catch basins, oil separators). Current projects are identified in the annual six-year Capital Improvement Plan.

### Yarrow Point

The Comprehensive Plan for the Town of Yarrow Point was adopted in 2015. Potable water service is provided by the City of Bellevue, which **can accommodate Yarrow Point's planned growth**. The sanitary sewer system is also operated by the City of Bellevue. New connections to the sewer main require a right of way permit from the Town and a sewer connection permit from the City of Bellevue.

The Town Stormwater Utility was developed in 2011. A comprehensive stormwater inventory and assessment identified several capital projects necessary to accommodate the Town's full land-use build out, supported in part through property tax, Real Estate Excise Tax and other fees. Five projects identified in the 2015 Capital Improvement Plan totaled $688,000. The Town is exempt from the National Pollution Discharge Elimination Permit System (NPDES) Phase II Permit.

## Rural Eastside King County Jurisdictions

Rural Eastside King County jurisdictions are generally located further east and are more geographically separate from other Eastside jurisdictions. All have generally strong growth projections, particularly North Bend, which is

projected to grow by nearly 45% by 2040. Each jurisdiction generally provides its own utility services.

## Carnation

The City of Carnation's Comprehensive Plan was last updated in 2015. The City owns and operates its water system. Its **water rights and capacity are sufficient** to serve forecasted demand. The City's sewer system was completed in 2008, previously the City was dependent on private septic systems. The sewer system currently has **excess capacity**, with a wastewater treatment plant design to serve a population greater than the project buildout for the City (and currently operating at only 25% of capacity). However, some capital facilities in Carnation appear to have capacity challenges. Specifically, the City has **no public stormwater system** and only two drainage basins. The Plan indicates that "stormwater from impervious surfaces must be infiltrated on-site, which can sometimes be difficult to achieve given localized areas of poorly drained soils and/or seasonal high-water tables."

## Duvall

The City of Duvall's Comprehensive Plan was last updated in 2015. The Comprehensive Plan **does not identify any gaps in facility provision** and includes goal and policy language that supports the provision of utilities to support future growth. The City owns and operates its water, sewer, and stormwater systems. It purchases its water from Seattle Public Utilities. Most of the detailed analysis of capacity for each utility is contained in the individual facility and capital improvement plans, rather than the Comprehensive Plan. However, the Comprehensive Plan specifically indicates that the sewer system currently has **capacity to serve 9,000 residents, with expansion capacity up to 13,000 residents**.

## North Bend

The City of North Bend's Comprehensive Plan was last updated in 2015. The Plan indicates that about **34% of the City's water pipe is nearing the end of its useful life,** and the City served by different water suppliers in its eastern and western areas. It also identifies several near-term and high-priority investments in the City's water and sewer systems, including expansion of the wastewater treatment plant and the resolution of water supply issues in Sallal. The Plan also indicates that flooding may occur due to several factors, including **"inadequate storm drain infrastructure in certain areas"**. No other capital facilities gaps are indicated, including to police, fire, school and other municipal facilities.

## Skykomish

The most recent Skykomish Comprehensive Plan was completed in 2015. The Town owns, maintains, and operates its own water distribution system. The Comprehensive Water Plan for the Town was adopted in 1993, and the Town has responded to the new laws and regulations to the best of its abilities, using grants and loans to provide maintenance and upgrades to the system. Any updates to the plan made since 1993 have not been reviewed or approved by the County or state.

The Town of Skykomish provides municipal water service through two wells located east of town. The water system was originally constructed in the early 1900s, however the town has continued to upgrade the system over the years. Water quality levels, fire flow, and storage facilities are **all adequate at this time**, however a 1993 Water Comprehensive Plan identified numerous improvements and service upgrades that were necessary. Funding has been identified for some of the needed upgrades, and some projects have been completed since 1993.

The General Sewer and Facilities Plan prepared for the Town in 2007 identified a strategy for developing a centralized wastewater collection, treatment, and disposal system that would replace the substandard septic systems used in Skykomish. That **system was planned to be complete** in 2015.

The Skykomish Stormwater Management Plan was adopted in 2014. The **town's system has nearly doubled since 2006**, and has benefitted greatly by the BNSF cleanup, the design of the Town's sewer system, and the Maloney Creek Rehabilitation project. Funding to maintain the system has not changed over the years, and while the Plan identified financing alternatives, there is **no dedicated fund to cover basic operation and maintenance expenses**.

## Snoqualmie

The City of Snoqualmie's Comprehensive Plan was updated in 2014. The plan indicates the following needs, based on anticipated 2010-2032 population growth and a more immediate six-year growth forecast:

- Satellite fire station if areas of the UGA are annexed into the City
- Water distribution pipe (about 10% of system) **nearing the end of its useful life**, particularly in the Canyon Springs area
- Energy efficiency and other upgrades to the sewer system, though **no expansions due to capacity constraints** are anticipated
- Improvements to stormwater infrastructure in older City areas, where infrastructure is less robust, with older pipes, and some sections lacking stormwater conveyance

## Central King County Jurisdictions

Central King County is home to two cities of over 100,000 residents, and several midsize jurisdictions that are growing rapidly. While some of its cities own their utility services, there is a high level of utility district overlap between cities, even those with their own services. There is also a higher number of utility districts active in this area.

### Burien

Burien's capital facilities element was last updated in 2015. Its water is provided by Seattle; King County Water Districts 20, 125, and 40; and the Highline Water District. Water supply is **currently sufficient**, though some improvements are required to improve fire flow. All of these districts purchase water from Seattle Public Utilities. The majority of Burien's sewer service is provided by the Southwest Suburban Sewer System, with other areas served by the Midway Sewer District and Rainier Vista/Val Vue Sewer District. The City has experienced some stormwater challenges in its Salmon Creek basin. The area is almost fully developed, and has experienced erosion and pollution tied to undetained runoff and lack of treatment in some areas.

The City's utilities are provided by utility districts with **extensions and improvements funded by users and local improvement districts**. As a result, to the extent there are utility gaps specific to developable sites, they depend on market conditions to justify extension costs.

### Covington

Covington's capital facilities and utilities elements were last updated in 2016. The City's water is provided by the Covington Water District, King County Water District 111, and Ham Water Company. Sewer is provided by Soos Creek Water and Sewer District. **District 111 has minimal capacity for new growth compared to other providers**, but only serves a limited number of properties. Soos Creek has identified capital projects within City limits, but it is not clear if these projects could "unlock" capacity. The element has identified a $**76.4 million funding gap for parks, stormwater, and transportation**. The land use plan may need to be revisited if no new funding sources are identified and LOS standards are not revised.

### Des Moines

The Des Moines 2035 Comprehensive Plan was adopted in 2015. Potable water and sanitary sewer service are provided to the city by water and sewer districts (Water: King County Water District 54, Highline Water District, and Lakehaven Utility District; and sewer: Midway, Southwest Suburban, and Lakewood Utility Districts). A **portion of the City is still served by**

**septic systems**, although future development is required to provide sanitary service.

The City provides stormwater management and requires new development to install onsite stormwater detention and treatment. No specific projects are identified in the Comprehensive Plan.

## Kent

Kent's capital facilities element was last updated in 2015. **No infrastructure gaps** were identified. The City's municipal water system does not cover the entire incorporated area. Areas outside the system boundary are served by Water District 111, the Soos Creek District, and the City of Renton. There are several new streets planned which could enhance development potential.

## Maple Valley

The City of Maple Valley Comprehensive plan was adopted in 2015. Potable water is provided by **two independent water districts**: the Covington Water District and the Cedar River Water and Sewer District, **plus one Group-A private water system**, Cherokee Bay Community Club, Inc. Both the Covington Water District and the Cedar River Water and Sewer District are seeking to update their intertie and partnership agreements, and in 2015, the Covington Water District identified $41.3 million dollars in projects to upgrade and maintain their facilities. They anticipate **only moderate water system improvements** within the ten-year planning horizon of the Comprehensive Plan.

Most of the City's sewer service is provided by the Soos Creek Water and Sewer District (SCWSD). The Plan prioritized $2.6 million in repairs to aging sewers and mains, some of which date back to the 1950s. **Annexing rural areas in the future could cause a significant impact** on the ability of the SCWSD to meet demand (e.g., through the County's 4-to-1 program that converts adjacent rural lands to urban).

The City of Maple Valley manages the majority of the City's stormwater system, which comprises catch basins, manholes, pipes, ditches, infiltration tanks, detention/retention vaults, and detention/retention ponds. The City continues to identify projects to resolve **chronic stormwater problems**, including areas where there is ongoing recurrent flooding.

## Normandy Park

The Normandy Park Comprehensive Plan was adopted in 2016. Water service is provided by three separate large water districts: Highline Water District, Water District 49, and Water District 54. Service is **adequate for**

**current needs and capable of responding to anticipated growth**. At the time of the City's Comprehensive Plan development, the Highline Water District Capital Improvement Plan identified one project to replace old Asbestos-Concrete water mains, in part, to reduce the potential for water line breaks.

The City does not own or maintain any sanitary sewer system components. Sanitary sewer conveyance services are provided by the Southwest Suburban Sewer District (SWSSD) and the Midway Sewer District. Treatment from both these systems is treated by the Miller Creek Wastewater Treatment Plant (WWTP) in the City. The latest SWSSD plan was developed in 2014, and Midway's latest plan was developed in 2008. These plans indicate that the **current system has sufficient capacity** to accommodate forecasted growth.

A portion of the city, estimated to include 459 persons, **does not receive sewer service**. The Capital Facilities Element notes that it is a priority to provide service in this area, either through expansion of sewer district boundaries, or building of infrastructure and reaching agreement with one of the districts about its construction and maintenance. Capital projects identified by the two districts focus on increasing capacity of the conveyance system, but it is noted that the **proposed improvements may be unrelated to growth** in Normandy Park.

The City has adopted a current Stormwater Management Plan (SWMP). The City is coordinating with surrounding jurisdictions to evaluate surface water management for two contiguous basins, and beyond projects identified for 2015 and 2016, had not identified any new stormwater facilities or projects for 2022-2035 (as of the 2016 Comprehensive Plan adoption date).

## Renton

Renton's capital facilities and utilities elements were last updated in 2015. The City provides water, wastewater, and surface water services to the City and some additional areas outside its boundaries. Some **recently annexed areas are currently served by other utility providers**, particularly in the southeast portion of the City. Additional water providers active in Renton are the Soos Creek Water and Sewer District, Cedar River Water and Sewer District, King County Water District 90, and the Coal Creek Utility District.

The City provides water to a 16 square-mile area. Of the City's water, 95% comes from City water sources and 5% from an agreement with Seattle Public Facilities to serve Boeing facilities. The Element states that future infrastructure projects developed to accommodate growth are identified in the Water System Plan Update.

Much of the City's wastewater infrastructure is **reaching the end of its useful life**. City models do not indicate any current capacity deficiencies, but **capacity may be an issue at various locations closer to 2030**.

## SeaTac

The SeaTac Comprehensive Plan 2035 was adopted in 2015. Five water districts provide service to SeaTac: Sea-Tac Airport Water System; King County Water District #125; King County Water District #20; King County Water District #49; and Highline Water District #75.

The Plan indicates that the availability of water may be a concern in the future. Since water districts serving SeaTac have historically obtained their water largely from Seattle Public Utilities, the population and employment **growth anticipated in Seattl**e over the next 20 years will affect their continued ability to supply water. This future is further complicated by the impacts that climate change is likely to have as snowpack and warmer temperatures will likely mean drier summers and more stress on water resources. SeaTac has adopted a policy to work with water districts to ensure that other water sources are developed to address future water needs.

Four sewer districts provide service to SeaTac: Valley View Sewer District; Midway Sewer District; Southwest Suburban Sewer District; and Kent Sewer District. In addition, some developed areas of the City are **not connected to sanitary sewers**. Sewer treatment is provided through the SeaTac Airport, the Southwest Suburban Sewer District, and King County's secondary wastewater treatment facilities in Renton. Historically, the City has not required connection to sanitary sewer service even when it is available, although adopted policy requires new development to connect when service is available within 300 feet.

The City indicated that being served by multiple water and sewer districts **complicates interjurisdictional coordination and the ability to assess system capacity** in terms of forecast population and employment growth.

SeaTac owns and operates a surface water utility. The City has adopted a 2013 Surface Water Utility Plan, and a 2012 Stormwater Management Plan. The Comprehensive Plan notes that City's stormwater infrastructure is aging, with **some sections well beyond their expected lifespan**. The Surface Water Utility is evaluating this infrastructure with the goal of repairing or replacing it as appropriate.

## Tukwila

The Tukwila Comprehensive Plan was adopted in 2015. Slightly more than 50 percent of Tukwila is served by the City's water system. The remainder is served by the King County Water Districts #125 and #20, Highline Water

District, the City of Seattle, and the City of Renton. The City purchases its water from the Cascade Water Alliance under a contract through the year 2064. Cascade's current primary source of water is through a contract with Seattle. Tukwila's Comprehensive Water Plan (2015) identifies areas of water supply and distribution deficiency, and the six-year Capital Improvement Plan proposes corrective improvements. A **citywide pipeline replacement program** is planned to extend over a 50-year period.

Similar to water service, slightly more than 50 percent of the City is served by the its sewer utility. The remining providers include the City of Seattle, City of Renton, and Valley View Sewer District, or the area is unserved by sewer. The Tukwila sewer system is exclusively a collector system with no treatment component. King County DNRP Wastewater Treatment Division provides Regional wastewater treatment at the South Treatment Plant in Renton. The 2014 Comprehensive Sewer Plan identifies deficiencies in the system, and corrective improvements are proposed in the six-year Capital Improvement Plan. The plan notes that, in order to provide infrastructure in the unserved portions of the City, **additional revenue is needed to extend service** to these areas.

Tukwila's surface water drainage system consists of both drainage improvements, public and private, and natural drainage. Except for a small area in the Ryan Way neighborhood, drainage is ultimately to the Green/Duwamish River. The 2013 Surface Water Comprehensive Plan evaluates the current inventory of existing facilities and identifies deficiencies and planned improvements. A range of surface water issues (**drainage, water quality, and aquatic habitat**) were identified and prioritized, and proposed improvements are included in the City's Six-Year Capital Improvement Program.

## South King County Jurisdictions

South King County jurisdictions are generally less populous compared to Central King County, though Federal Way is projected to surpass 100,000 residents by 2040. Some communities are growing rapidly, particularly Black Diamond, which is projected to grow by 57%. While some of its cities own their utility services, there is a high level of utility district overlap between cities, even those with their own services. Several communities are served by Tacoma Public Utilities.

### Algona

The Infrastructure and Public Services and Transportation elements of the Algona Comprehensive Plan were **last updated in 2015**. The plan noted that existing services in Algona fall within **acceptable levels of service**

**and that future development projected through 2035** will be adequately served provided a systematic approach to facility maintenance is employed.

The City has an interlocal agreement with Auburn for water service and has identified **2.5 million dollars in needed reservoir and water main projects**. The City owns and maintains the local collection system for the sewer system, and the trunk lines and treatment facility are owned by King County Metro. The City bills customers for King County charges, as well as for local maintenance and operation costs. The County trunk line has capacity to 2035. Facility improvements are addressed in Metro's Capital Improvement Program

The City's 2010 stormwater documents identified the need to increase stormwater pipe sizes to 36" in several areas to better handle storm flows, as well as a need for drainage swales sized to address a 25-year/24-hour storm events, to be provided by development.

## Auburn

Auburn's capital facilities element was **last updated in 2015**. The Element describes currently utility service but does not identify specific gaps or planned projects. The City provides **water, sewer, and stormwater service** to its limits and several external areas. The City's watershed sources are **supplemented by wells** and **two connections to Tacoma Public Utilities'** regional water system. There are **significant areas in the sewer service area which are currently on septic**, with plans to expand service in the Comprehensive Sewer Plan.

## Black Diamond

The City of Black Diamond's Comprehensive Plan was **adopted in 2019**. The City provides water to most of its limits, while the Covington Water District serves its northeast corner. City water is sourced from springs which have **adequate supply** to serve growth, though the City has long term concerns about impacts to **water quality and reliability** due to erosion and steep slopes. It is working to address these concerns while also seeking a supplementary water source. The City otherwise has **sufficient water rights to serve future growth**. System infrastructure improvements will be required to accommodate growth, outlined in the City's Capital Improvement Plan.

Similar to water, the City serves most of its limits with sewer, while the northeast corner is served by the Soos Creek Sewer District. The sewer system must grow to accommodate significant growth anticipated in two planned developments, but these **improvements have been addressed with development agreements**. The Plan does not identify gaps related to stormwater, and reports no major flooding problems. The current Capital

Improvement Plan (2019-2024) identifies funded improvements for all City-operated utilities.

## Enumclaw

Enumclaw's capital facilities element was last updated in 2015. The City owns and operates its water system, including its water sources. The City's sewer system requires **improvements to accommodate future capacity**, but the planned timing of these improvements is not noted. While the City has a stormwater system, it **does not currently have a stormwater utility to fund repair and maintenance of that system**. No gaps were otherwise noted for water or stormwater. There are several new roads planned which could enhance development potential in part of the City's unincorporated UGA.

## Federal Way

Federal Way's Comprehensive Plan was last updated in 2015. Most of Federal Way's water and sewer service is provided by the Lakehaven Utility District. Small parts of the City receive water from Tacoma Public Utilities, Highline Water District, and the City of Milton. For sewer, small areas are served by the Midway Sewer District, Metro/King County, Pierce County, and the City of Tacoma. Lakehaven Utility District has sufficient resources to fund its capital projects along with current operations.

## Milton

The majority of Milton's potable water supply is provided through **six City groundwater wells** located in the City's service area. Existing interties with the Lakehaven Utility District and an agreement with the Mt. View-Edgewood Water Company can provide fire flow.

Milton has **sufficient water rights** available to serve future projected populations, however **aquifer constraints** prevent the City from being able to provide that volume. The City's wells are operated at a volume output level at or near aquifer capacity production limits. Projected maximum day demands are **likely to exceed well and aquifer capacity by 2022**. The City will need to develop additional source capacity before this time. Coordination with Lakehaven Utility District and the Mt. View-Edgewood Water Company may help augment supply if needed.

The majority of Milton's sanitary sewer service is provided by Pierce County Public Works and Utilities, with small areas served by the Lakehaven Utility District, and septic systems. Over the next 20 years, it is anticipated that **improvements will be needed to the conveyance system in order to meet demand**, especially in the Hylebos area. Milton wastewater is treated at the Tacoma Central Wastewater Treatment Plant treats wastewater from

the City. Capacity at this facility is adequate to manage future needs, however commercial and industrial uses would be required to comply with industrial pretreatment and prohibited discharges regulations of the city's two wastewater utilities.

The City of Milton operates a small municipal separated storm sewer system. The City **routinely experiences flooding** during high flow events, most notably in the Hylebos Creek area. To address this, the City has purchased flood prone properties, and has identified projects to improve aging facilities and open channels that are better managed in pipes.

## Pacific

Pacific's Comprehensive Plan was last updated in 2015, and its capital facilities element was based on information from the 2010 Sanitary Sewer Plan and the 2009 Water System Plan. The capital facilities element indicates that the City's potable water distribution system consists of **aging and undersized asbestos cement pipe**, buried at shallow levels now considered nonstandard; these conditions are slowly being remedied by the City. Sanitary sewer service and treatment is provided by King County Metro downstream from the main pump stations. The element notes that **industrial and commercial users may require higher levels of service** than currently provided. The element notes that **new sanitary facilities will be needed** to provide service to several infill sub-basins in areas along SR 167 and Valley West Highway

The City of Pacific's storm drainage system is challenged by topography, a high ground water table, and low soil permeability, which have created **drainage issues**, especially in the winter months. To avoid burdening City infrastructure, the City requires new development to incorporate low impact development approaches, on-site storm water management, and other drainage management techniques.

# Appendix B. Infrastructure Tiering

This framework provides a system of assigning tiers to sites for each essential infrastructure category. (Water, sewer, stormwater, and transportation.). The intent is to filter buildable sites to identify only those at risk of not being developable during the planning period due to infrastructure gaps. Once identified, cities should review the sites to determine which ones should be removed from the buildable land supply and document their rationale.

For commercial and industrial sites, including larger multifamily developments, the bar for infrastructure capacity can be higher. **Appendix C** offers a more technical assessment, in the event that this process is not sufficient.

## Infrastructure Tiers

A. Infrastructure exists and has the capacity to accommodate planned development.
    - Requires affirmation from local public works departments and utility districts, as applicable

B. Infrastructure does not currently exist, but plans to add necessary improvements exist and funding is identified.
    - Requires affirmation from local public works departments and utility districts, as applicable
    - Requires affirmation from finance departments

C. Infrastructure does not currently exist, but plans to add necessary improvements exist. Funding is uncertain.

D. Infrastructure does not currently exist. No plans have been adopted to add necessary improvements.

## Interpreting Tiers

If a site ranks A-B in all categories, it is likely to be available for development within the planning period. If a site has any C rankings, the city should evaluate whether the funding uncertainties are likely to be resolved during the planning period. If they are not, an infrastructure gap could exist. If funding is not likely to be resolved for an extended period, capacity assumptions for the site should reflect development delays. If a site is ranked D in any category, an infrastructure gap is likely. Unless there are likely scenarios under which the gap could be resolved during the planning period, sites with D rankings should be removed from the developable land supply.

# Appendix C. Advanced Infrastructure Tiers

Some uses, such as large industrial and commercial developments, will have more substantial infrastructure requirements than others. When a potential infrastructure gap has been identified in these cases, a more detailed review may be warranted. This section describes suggested standards for major industrial and commercial development. If a site ranks A-B in all categories, it is likely to be available for development within the planning period.

If a site is ranked C in any category, the City should evaluate whether a gap exists that will limit development during the planning period. This evaluation process can begin with identifying any existing plans and funding to address the gap, as outlined in **Appendix B.**

## Sewer Tier Standards

- **A:** ≥ 8" main located adjacent to or stubbed to site or within ~200 ft of site with depth allowing gravity flow. No downstream pipe/treatment capacity issues.
- **B:** ≥ 8" main located within ~1,000 ft, with no downstream deficiencies. Private lift station may be needed.
- **C:** No nearby pipe and/or significant lift station and force main needed. Downstream deficiencies may be present.

## Water Tier Standards

- **A:** ≥ 12" main adjacent or within ~200 ft, preferred loop system existing. No low-pressure issues.
- **B:** ≥ 8" adjacent, or ≥ 12" main within ~1,000 ft. No pump station or pressure/treatment deficiencies.
- **C:** No nearby pipe. System deficiencies present.

## Stormwater Tier Standards

- **A:** ≥ 12" public main adjacent or within ~200 ft, or ability to discharge to managed surface waters or on-site infiltration. No capacity issues.
- **B:** ≥ 12" main within ~500 ft; possible outfall to nearby regulated surface channel or wetland, or limited on-site infiltration capacity.
- **C:** No adjacent public storm, no available discharge point to surface water, or no on-site infiltration capacity.

## Transportation Tier Standards

Transportation infrastructure is evaluated based on two metrics: local access and system mobility.

**Local Access**

- **GOOD:** Property has direct connection and no off-site improvements or minor frontage improvements are necessary.
- **POOR:** Property does not have a direct connection and/or significant improvements are necessary to gain local access.

**Transportation System Mobility**

- **GOOD:** Mobility of adjacent system has a PM peak two-hour volume-to-capacity ratio (v/c) ≤ 0.99 (an approximate Level of Service [LOS] F or better).
- **POOR:** Mobility of adjacent system has a PM peak hour v/c ratio > 0.99 (an approximate LOS F or worse).

**Combined Transportation Grade**

- **A:** Highway Access and Transportation System Mobility are good.
- **B:** Highway Access is good and Transportation System Mobility is poor or highway access is poor and transportation system mobility is good.
- **C:** Highway Access and Transportation System Mobility are poor.