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2021 King County Urban Growth Capacity Report

June 2021

APPROVED BY THE KING
COUNTY GROWTH
MANAGEMENT PLANNING
COUNCIL JUNE 23, 2021

(Technical updates July 28, 2021)

2020 IMAGE

July 28, 2021 Technical Update: Data for Bothell updated. Technical updates do not meaningfully alter the findings from the report approved by GMPC on June 23, 2021.

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City of Carnation	City of Maple Valley	City of Shoreline
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Executive Summary

About the Urban Growth Capacity Report

The 2021 Urban Growth Capacity Report is King County’s periodic assessment of development capacity for future housing and employment. The report is a mid-planning cycle assessment on how jurisdictions are achieving the planning goals of their 2035 comprehensive plans. The report is a culmination of the county’s Review and Evaluation Program, commonly referred to as “Buildable Lands,” as required by the Growth Management Act in RCW 36.70A.215, and it is King County’s fourth buildable lands report. It is a collaborative production of the 40 jurisdictions across King County that analyzes the form, quantity, and density of residential and non-residential development observed between 2012 and 2018. It also estimates capacity for accommodating 2035 growth targets with consideration for market and infrastructure constraints.

Amendments to the Growth Management Act in 2017 expanded the purview of the report beyond measuring capacity for projected growth, requiring the seven buildable lands counties to examine more broadly how jurisdictions are achieving targets and density goals. A finding that a jurisdiction has insufficient capacity for its target—or that a jurisdiction is not achieving its growth targets or urban densities—could necessitate Reasonable Measures to be adopted in the next periodic update of comprehensive plans. In response to this amendment, the 2021 Urban Growth Capacity Report compares estimated housing and employment growth from 2006-2018 relative to 2006-2035 growth targets, as well as the achieved densities of 2012-2018 development to the densities allowed in zoning and development regulations.

The 2017 GMA amendments also call for Buildable Lands counties to scrutinize market constraints, infrastructure gaps, and development regulation assumptions utilized in the report to ensure that more meaningful market-based assumptions guide capacity calculations.

Regional Planning Context

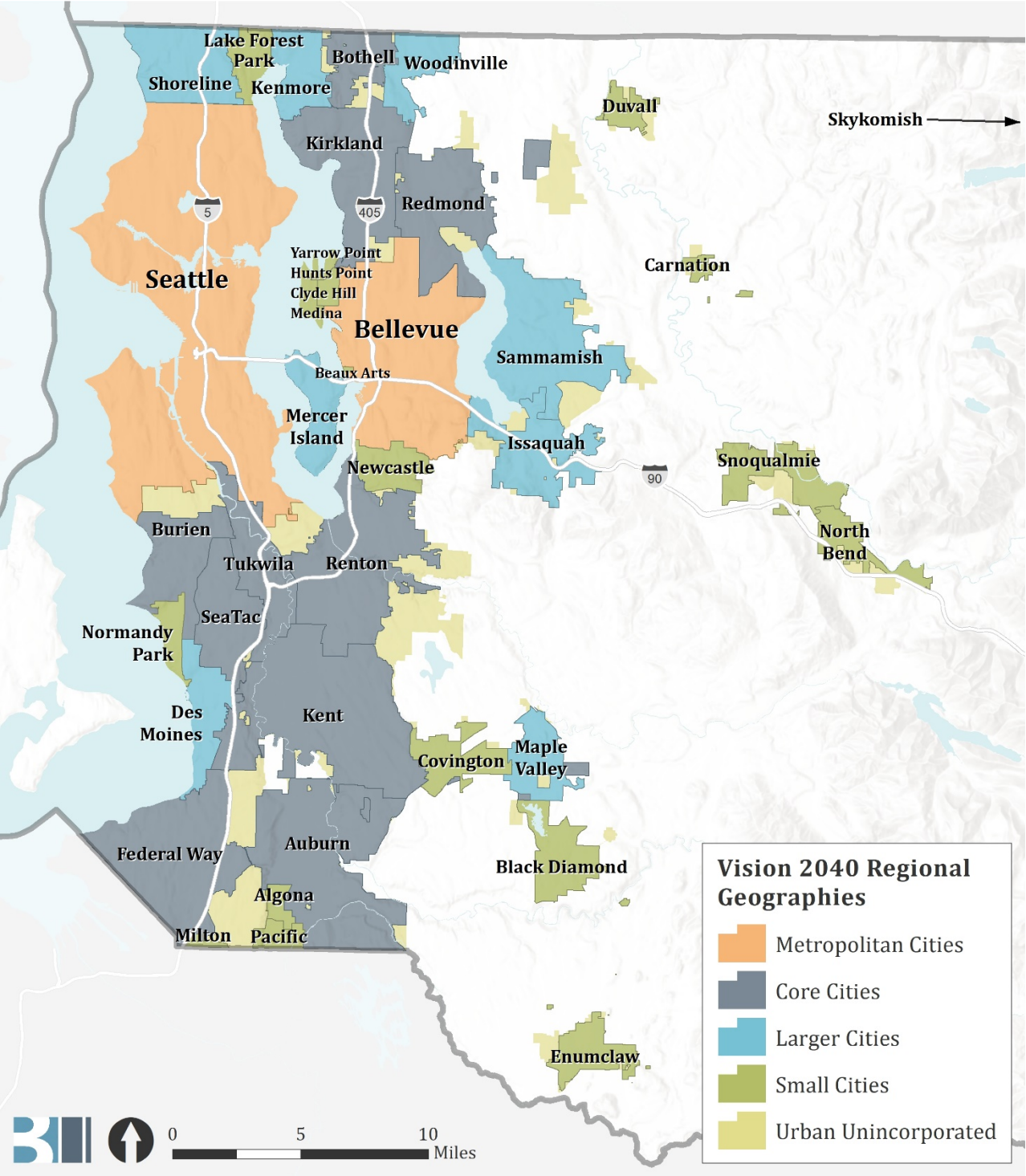
The 2021 Urban Growth Capacity Report implements King County’s Review and Evaluation Program as set out in the King County Countywide Planning Policies. The Report analyzes King County jurisdictions’ progress toward adopted planning goals expressed in the 2012 King County Countywide Planning Policies growth targets and 2015 Comprehensive Plans. The Report examines capacity and growth assumptions for 2035, the 20-year planning period established by the 2015 comprehensive plans.

The 2015 comprehensive plans and 2012 Countywide Planning policies implement the VISION 2040

policy framework and Regional Growth Strategy, developed by the Puget Sound Regional Council (PSRC). While PSRC has since adopted VISION 2050 and a revised Regional Growth Strategy, because the Urban Growth Capacity Report looks back to the 2012 countywide planning policies and 2015 comprehensive plans implementing VISION 2040, most of the report's analysis is organized by the VISION 2040 Regional Geographies, shown in Exhibit 1. Final capacity results and city profiles are grouped by VISION 2050 Regional Geographies (shown in Exhibit 2), to emphasize how the data can be used while updating comprehensive plans for the 2024 periodic update.

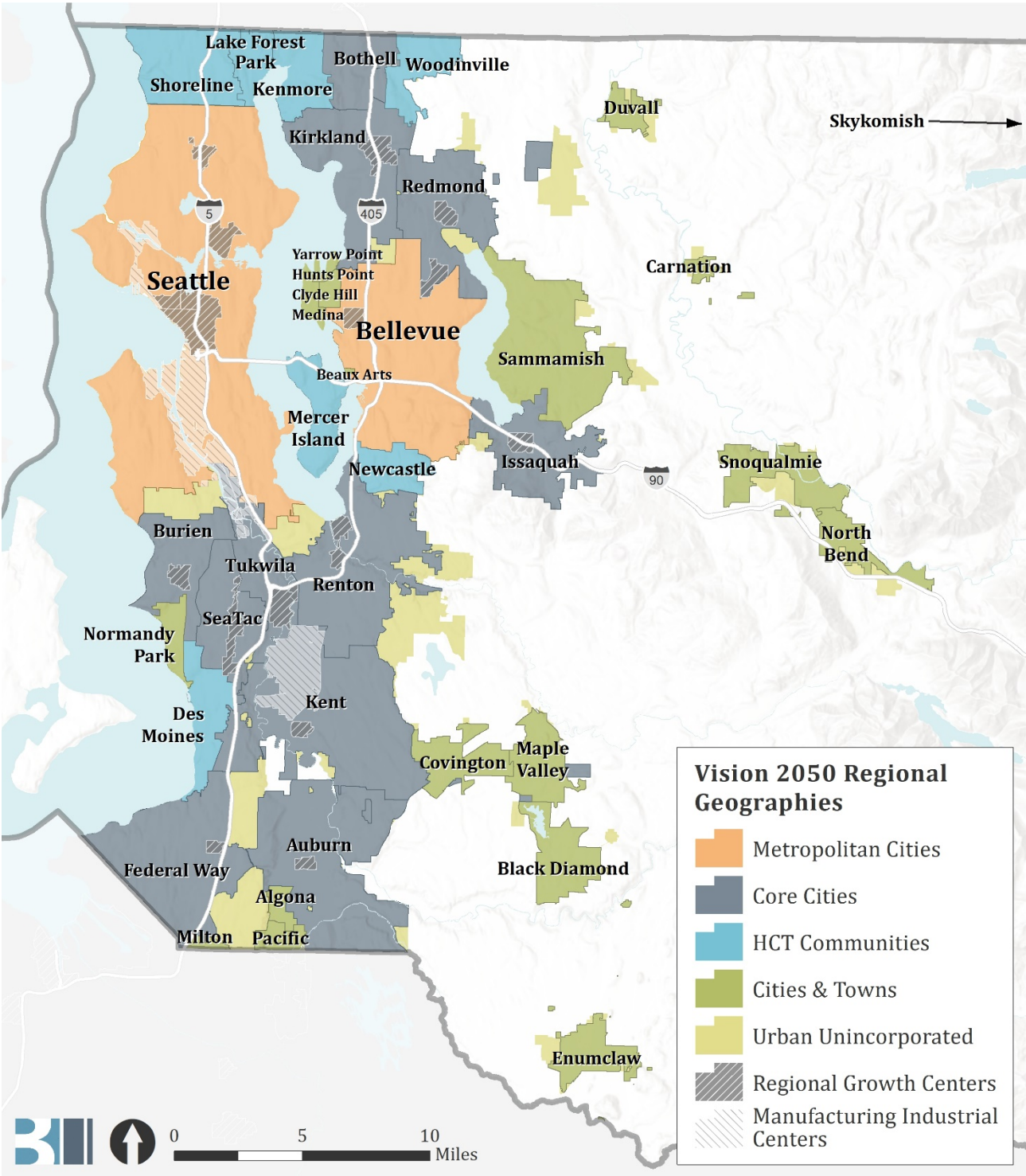
Findings from the Urban Growth Capacity Report underscore how cities and King County are planning for growth focused on a network of designated Regional Growth Centers and high capacity transit station areas. Growth patterns have been consistent with growth targets implementing the Regional Growth Strategy. Capacity exists to support new growth across the density spectrum, and much of it is concentrated in higher density areas in Metropolitan and Core Cities with Regional Growth Centers and Manufacturing/Industrial Centers. Development trends in the county have been evolving toward the higher densities many jurisdictions have planned for, as the high capacity transit network builds out and demand for higher density development expands to new communities.

Exhibit 1. PSRC VISION 2040 Regional Geographies Used for Summarizing Development Trends



Source: PSRC VISION 2040; BERK, 2021.

Exhibit 2. PSRC VISION 2050 Regional Geographies Used for Summarizing Growth Capacity



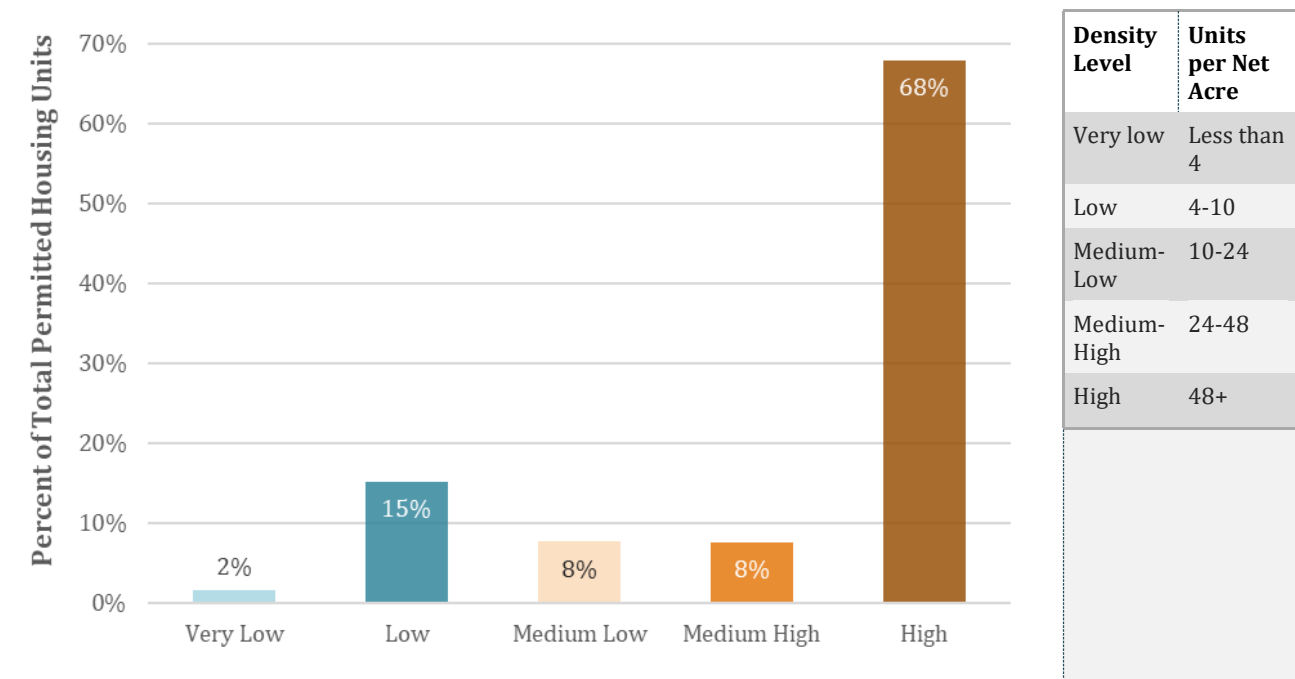
Sources: PSRC VISION 2050; BERK, 2021.

Summary of Findings

Development Activity

The Urban Growth Capacity Report summarizes the densities and locations of urban development between 2012-2018. This period was marked by significant multifamily and higher density development, reflecting King County’s continued progress towards directing growth towards cities and efficient land uses. As shown in Exhibit 3, nearly 70% of the housing permitted during the evaluation period was developed at densities of at least 48 dwelling units per acre, and 17% of permitted housing during this period was constructed at under 10 dwelling units per acre. Development in middle density formats was more limited. These findings demonstrate how residential development during this period trended towards the high and low ends of the density spectrum.

Exhibit 3. Permitted Housing Units by Achieved Density, 2012-2018

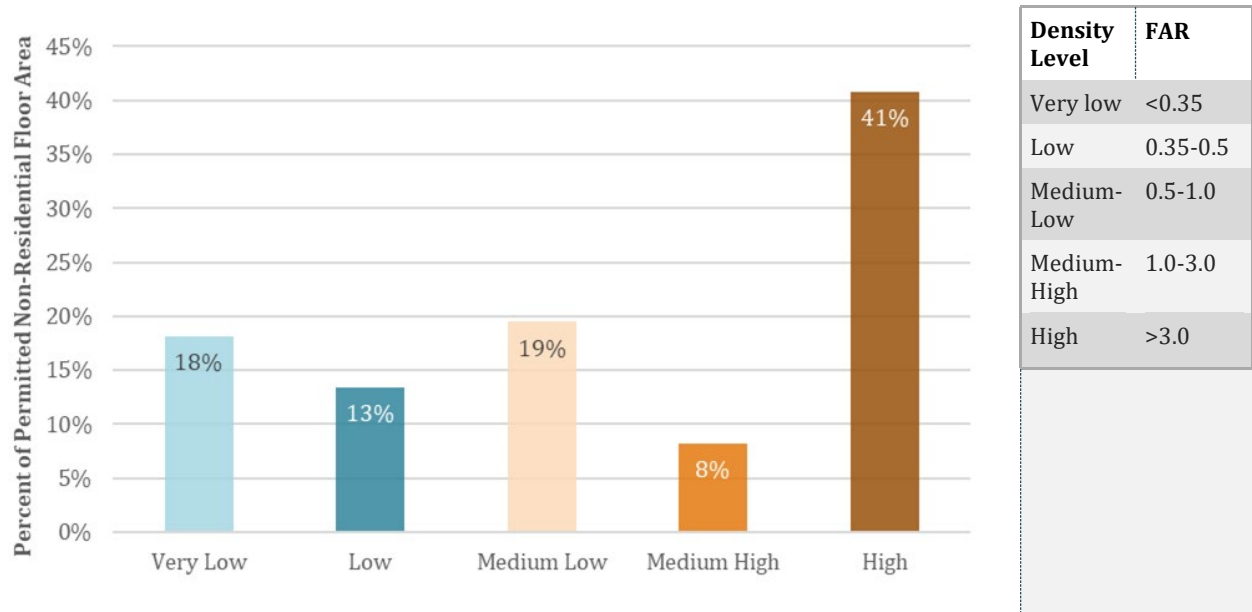


Source: BERK, 2021, based on permit data summarized by King County jurisdictions.

Non-residential development was more evenly distributed across density levels. Just over 40% of non-residential built space was developed at the highest density level, reflecting the large volume of dense office and mixed-use development during the time period. Half of observed non-residential

development developed at densities less than 1 floor area ratio (FAR).¹

Exhibit 4. Permitted Non-Residential Development by Achieved Density, 2012-2018



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

This study also included analysis comparing achieved densities to maximum as-of-right densities allowed by zoning. Findings varied significantly by jurisdiction. Some jurisdictions saw average achieved residential densities higher than their planned maximum within lower or middle density zones. Others saw achieved densities much lower than planned, particularly in zones allowing the highest densities. This latter finding was particularly true for non-residential development. One reason for this outcome is that communities zoned for higher density development in anticipation of future market shifts that had not yet occurred in the 2012-2018 evaluation period.

Progress Toward Growth Targets

King County has experienced historic population and economic growth in recovery from the Great Recession. Guided by the Regional Growth Strategy and adopted growth targets, this growth has been overwhelmingly urban; less than 3% of population growth in King County since 2006 has occurred in the rural area. The Urban Growth Capacity Report analyzes progress made by cities and urban unincorporated King County towards achieving 2006-2035 growth targets. Because past buildable lands reports have not focused on this specific outcome before, the 2021 report examines growth since 2006 and through 2018.

¹ FAR stands for Floor Area Ratio, a measure comparing the area of built space to the land area of the associated lot or parcel. Higher FAR values reflect more dense development, and values higher than 1.0 indicate that the built space surpasses the land area of the associated parcel (as can occur in multi-story buildings).

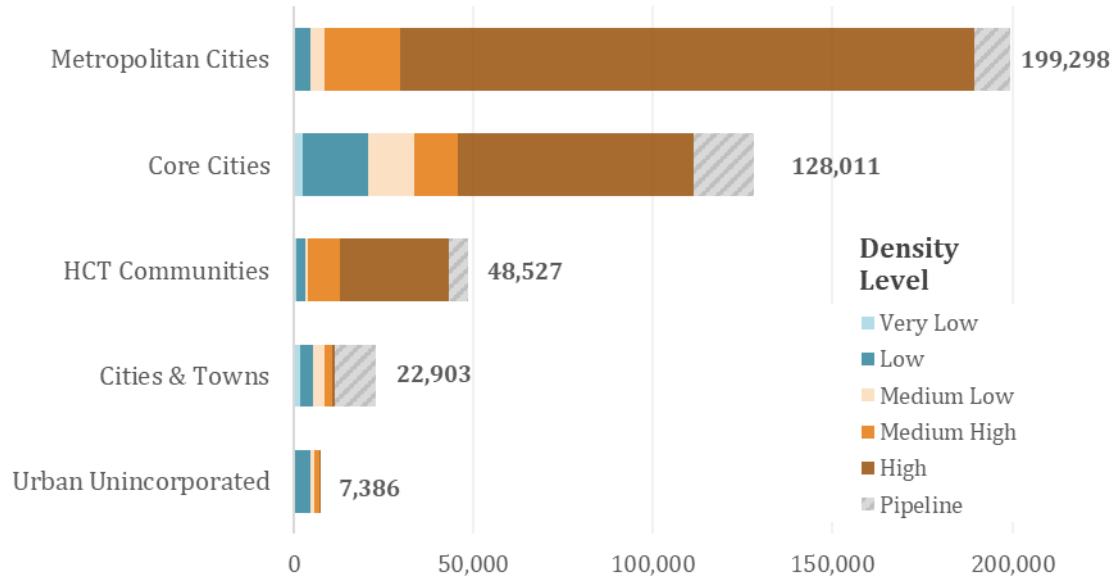
Urban King County is growing at a rate to achieve its adopted growth targets. Approximately 41% of the target period has elapsed between 2006-2018. Urban King County has achieved 47% of its housing and employment targets, growing slightly faster than this prorated pace. These growth rates are particularly notable given that the time period spans the Great Recession, which diminished population and housing growth to a near standstill and netted out most of the employment gained during the 2000s.

The effects of the recession and rates of recovery were not uniform across King County. At a Regional Geography level, Metropolitan, Larger, and Small Cities grew faster than the pace needed to achieve growth targets. Job growth compared to targets was also strong in Metropolitan and Small Cities. While housing growth has been less strong in Core Cities and the urban unincorporated area, these geographies are still on track to achieve their residential growth targets. Employment growth in Core and Larger Cities was slower than pace but meets the countywide definition of consistency with growth targets 2006-2018. The urban unincorporated area was slightly ahead of pace to achieve its employment growth target. More information on growth trends and achieving targets is in Chapter 3 of the Report.

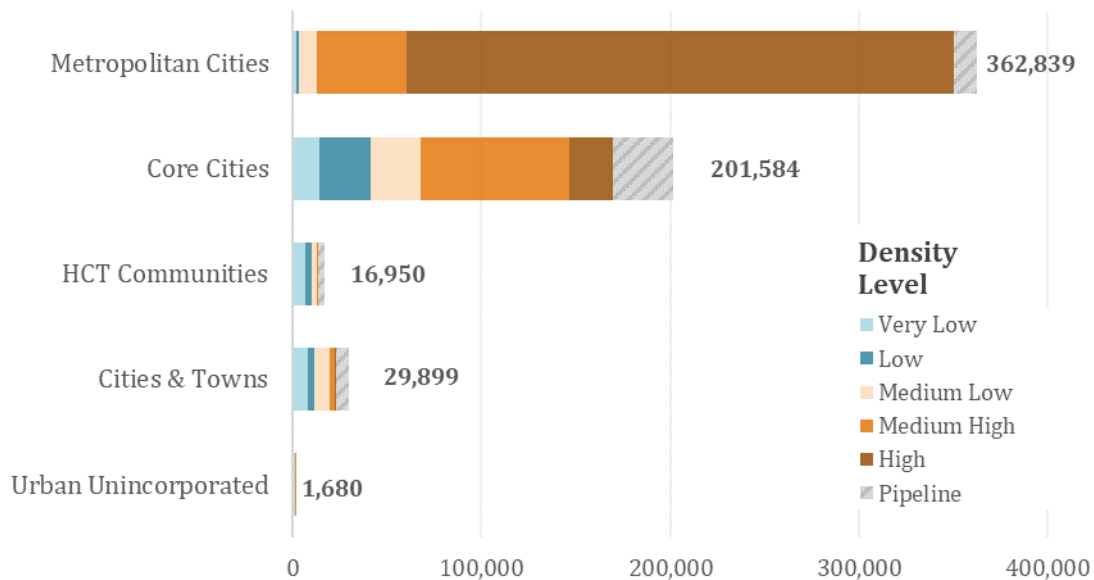
Development Capacity

The 2021 Urban Growth Capacity Report finds that urban King County has capacity for over 400,000 housing units and 600,000 jobs. This capacity is sufficient to accommodate the remainder of its 2035 housing and employment growth targets, and looking ahead, sufficient to accommodate projected future growth during the next planning period. See Exhibit 5 and Exhibit 6 for summaries of residential and employment capacity by Regional Geography and density level.

Approximately 50% of residential and 60% of employment capacity in King County is in Metropolitan Cities. Additionally, nearly a third of residential and non-residential developable capacity is in the eleven Core Cities. Residential capacity in Metropolitan and Core Cities is overwhelmingly at the county's highest density levels and drives the finding that 83% of the county's developable residential capacity exists at densities greater than 24 dwelling units per acre. Nearly 80% of King County's employment capacity is zoned at 1 FAR or higher. At the other end of the density spectrum, approximately two-thirds of King County's developable residential land is zoned for ten dwelling units or less, making up 10% of residential capacity. More findings and detail on capacity is contained in Chapters 4 and 7.

Exhibit 5. Dwelling Unit Capacity by Density Level

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

Exhibit 6. Employment Capacity by Density Level

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

Implementing Urban Growth Capacity Findings

As a mid-planning cycle check on development trends and achievement of growth management goals, the Urban Growth Capacity Report contains a host of information useful for the upcoming periodic 2024 comprehensive plan update. Most directly, the Urban Growth Capacity Report contains

recommendations that some jurisdictions adopt Reasonable Measures in their comprehensive plans to address specific inconsistencies identified in the report. More information about the evaluation of when and where Reasonable Measures may be necessary is provided in Chapter 5. Data about achieved density and capacity by density level can help jurisdictions identify where shortfalls in development capacity may impede achieving targeted planning goals, like encouraging the production of “missing middle” housing or mixed-use development near transit station areas. Chapter 6 contains more information on applying or using Urban Growth Capacity Report data or findings for future planning efforts.

Ch. 1 Introduction

This report presents the findings of King County’s Urban Growth Capacity Study. 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. The purpose of the Urban Growth Capacity Study and Report are to provide a periodic evaluation to determine whether projected growth can be accommodated within the UGA. In previous cycles, this product was referred to as the King County Buildable Lands Report (BLR). Past Buildable Lands Reports were completed by King County in 2002, 2007, and 2014.

This report includes 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 growth targets.
- Analysis of achieved densities by jurisdiction based on growth between 2012 and 2018 and comparison to planned densities.
- Capacity for housing and job growth through the year 2035.

This report was developed by King County in collaboration with each of its 39 cities through the Growth Management Planning Council (GMPC). The findings inform the development of new growth targets by jurisdiction for the 2019-2044 planning period. Findings will also be used by cities to inform the next round of comprehensive plan updates and subsequent implementation.

Regulatory and Policy Framework

The Washington State Growth Management Act (GMA) was adopted to address the need for rapidly growing cities and counties to adequately plan for future growth while protecting natural resource lands and environmentally sensitive areas. A key component of the GMA is the Review and Evaluation Program (also known as the Buildable Lands Program), a requirement which applies to King County and all cities within it. This program mandates the review and evaluation of urban growth capacity to ensure each jurisdiction has designated adequate residential, commercial, and industrial lands to meet growth allocations developed by the counties in consultation with their cities.

In 2017, the Washington State Legislature passed the first major revision to the program (SB 5254). This update to GMA includes new requirements related to infrastructure gap analysis, market factor assumptions, and Reasonable Measures. This update to GMA specifies the following:

- Reasonable Measures: Under SB 5254, these measures that are adopted to address inconsistency between forecasted and experienced growth are no longer required to be monitored and adjusted annually by buildable lands counties and cities.
- Land Suitable for Development: Under SB 5254, the required evaluation of suitable land must

include land use or zoning regulations, environmental regulations impacting development, other regulations that might inhibit the achievement of assigned densities, and infrastructure gaps. The evaluation of suitable land must also include development of a reasonable market supply factor that identifies reductions in land suitable for development and redevelopment.

- **Buildable Lands Report Timing:** Under SB 5254, the buildable lands report must be completed no later than two years prior to a jurisdiction's next comprehensive plan update for those comprehensive plans due to updated prior to 2024.

Countywide Planning Policies

The Proposed 2021 King County Countywide Planning Policies (CPPs) establish the county's Urban Growth Area (UGA) and allocate projected countywide growth in the form of growth targets for each city as well as urban and rural unincorporated areas. CPPs also establish the Review and Evaluation Program for King County and guide the development of the Urban Growth Capacity Study and Report through policies DP-19, DP-20, and DP-X2.² Components of the Buildable Lands Program include annual data collection, periodic evaluation reports, and adoption of Reasonable Measures as needed to ensure capacity to accommodate projected growth within the county's UGA. These Reasonable Measures are to be adopted in comprehensive plans, and jurisdictions will collaborate to provide data periodically about the effectiveness of those measures.

In King County, growth targets are adopted in the King County Countywide Planning Policies.³ Countywide growth targets are derived from population projections released by the State Office of Financial Management (OFM) and an economic forecast developed by the Puget Sound Regional Council. Population growth is converted to housing units and the projected housing and employment growth is then allocated to jurisdictions within the Regional Geographies established in the VISION 2050. Jurisdictions within Regional Geographies then collaboratively distribute their allocated growth to create city and urban unincorporated growth targets.

Local Comprehensive Plans

Under GMA, jurisdictions must plan and provide for both household and job growth to meet their targets through designation of sufficient land suitable for development in their comprehensive plans and regulations. This Urban Growth Capacity Report presents estimated capacity for housing and employment growth by jurisdictions based on a methodology informed by actual achieved densities from recent development activity. The results enable evaluation of whether counties and cities can meet the adopted targets. Deficiencies identified in this study must be addressed by the jurisdiction in

² The Proposed 2021 CPPs include temporary numbering. Policy numbers could change when the final CPP are adopted.

³ The Urban Growth Capacity Report evaluates the growth targets adopted in the 2012 Countywide Planning Policies. The adopted targets cover a period of 2006-2031. For the Urban Growth Capacity Report, these targets were updated for major annexations and extended on a pro rata basis to 2035, to be consistent with the 2015-2035 planning period for 2015 comprehensive plans. This method was recommended to jurisdictions to extend their 2031 targets to 2035, as the periodic comprehensive plan update deadline was delayed to 2015 after the Great Recession.

their next comprehensive plan update.

Department of Commerce Guidelines

In 2017, the Washington State Legislature passed E2SSB 5254, which constituted the first major revision to the buildable lands program since its inception in 1997. In 2018, the Washington State Department of Commerce (Commerce) published a revised Buildable Lands Guidelines report for use by counties and cities responsible for carrying out a Review and Evaluation Program under GMA. These Guidelines summarize requirements of RCW 36.70A.215 and WAC 365-196-315, and provide best practices and methodologies for carrying out those requirements. King County used these Guidelines as a resource when developing its own policies and procedures for carrying out the Urban Growth Capacity Study.

Countywide Coordination

This report is the result of nearly two years of coordination and collaboration between King County and the 39 cities within King County. King County facilitated development of the report by establishing a methodology, creating standardized data collection and assumption guidelines, and completing the final report. King County also led the Technical Committee—an interjurisdictional group of planners and data technicians—to develop and vet assumptions in the study methodology. Individual cities and King County supply development and land supply data and select assumptions appropriate to their jurisdictions to complete the report. Exhibit 7 below describes the roles and responsibilities for King County and cities in developing the Urban Growth Capacity Report.

Exhibit 7. Roles and Responsibilities

	King County	Individual Jurisdictions
Interjurisdictional coordination	Facilitator of the UGC and report preparation.	Volunteer and participate in Technical Committee methodology review.
Developing guidance for data collection and analysis	Develop standardized guidance and templates for data collection and analysis, with input from the UGC Technical Committee.	Review and offer feedback on draft guidance.
Conduct analysis of achieved densities	Review data shared by jurisdictions for consistency with guidance. Work with jurisdictions to resolve any inconsistencies.	Gather and analyze data in accordance with guidance and share results with County for review.
Conduct land capacity analysis	Review data shared by jurisdictions for consistency with guidance. Work with jurisdictions to resolve any inconsistencies.	Identify developable land supply, select local development assumptions to calculate capacity in accordance with guidance.
Reasonable Measures	Identify inconsistencies between growth, capacity, and planning goals using standard criteria.	Review inconsistencies and determine whether Reasonable Measures are necessary. Implement Reasonable Measures in 2024 comp plan updates.

Changes from the 2014 Buildable Lands Report

While the overall purpose of this report is identical to the 2014 King County Buildable Lands Report, there are several changes in the 2021 Urban Growth Capacity Report. Highlights of the changes are listed below.

- **New analysis of capacity and achieved density for all jurisdictions.** Unlike the 2014 Buildable Lands Report, which carried forward several key assumptions and findings from the previous 2007 edition, this study conducted a new and complete analysis of both development trends and growth capacity for all jurisdictions.
- **New regional geographies for summarizing capacity and growth targets.** VISION 2050 was adopted by PSRC in 2021. This regional plan updates the Regional Growth Strategy, including the organization of cities and unincorporated areas into five Regional Geographies, each with population and employment growth targets for 2019-2044. Ch. 4 summarizes growth capacity for these new VISION 2050 regional geographies. However, Ch. 3 summarizes historic development

trends using the older VISION 2040 regional geographies because that growth is being compared to targets developed when those older geographies were in use.

- **Infrastructure gap analysis.** The methodology used in this study includes a formal evaluation of infrastructure gaps and their effects on urban growth capacity. While consideration of infrastructure availability had long been a component of King County’s buildable lands analysis, this change included more specific guidance and up-front analysis to address a new requirement added by the legislature in 2017.
- **Updated approach to “market factor” assumptions.** 2017 legislative changes also called for a more rigorous approach to developing “market factor” assumptions that account for the estimated percentage of developable land that is likely to remain undeveloped over the course of the planning period due to market barriers.
- **Reasonable Measures.** The 2017 legislative changes added additional points of analysis for which jurisdictions would need to adopt Reasonable Measures. Under past buildable lands analyses, jurisdictions experiencing a shortfall of capacity for their adopted target could be subject to Reasonable Measures. The 2017 legislation indicated that jurisdictions not achieving their growth targets or planned densities—and unlikely to achieve them by the planning horizon—would also be required to adopt Reasonable Measures to overcome these circumstances. The 2021 Urban Growth Capacity Report presents an analysis against the three Reasonable Measures tests and note jurisdictions that will adopt Reasonable Measures in their 2024 comprehensive plans.

Report Components and Organization

This report is organized into the following components.

- **Executive Summary**
- **Ch. 1. Introduction:** This chapter describes the regulatory and policy framework for Buildable Lands reporting in Washington State and King County. It provides an overview of the coordination process between the County and cities to prepare this report, identifies key changes from the 2014 Buildable Lands Report, and outlines the report components and organization.
- **Ch. 2. Methodology and Guidance Overview:** This is an overview of the methodologies used by individual jurisdictions for evaluating historic development trends as well as future growth capacity. The full guidance provided to jurisdictions are included in appendices to this report.
- **Ch. 3. Development Trends:** This chapter begins with a summary of residential and employment growth that occurred between 2006 and 2018. These trends are compared to adopted targets for jurisdictions and PSRC Vision 2040 Regional Geographies. This chapter also summarizes new development that occurred between 2012 and 2018 by achieved density level.
- **Ch. 4. Growth Capacity:** This is a summary and discussion of urban growth capacity within jurisdictions and aggregated by PSRC Vision 2050 Regional Geographies. Capacity is also summarized by assumed density level to provide an indicator of how much capacity may be available for different kinds of development and housing types—from new towers in dense downtown areas to lower density single family neighborhoods and the middle density typologies in between.

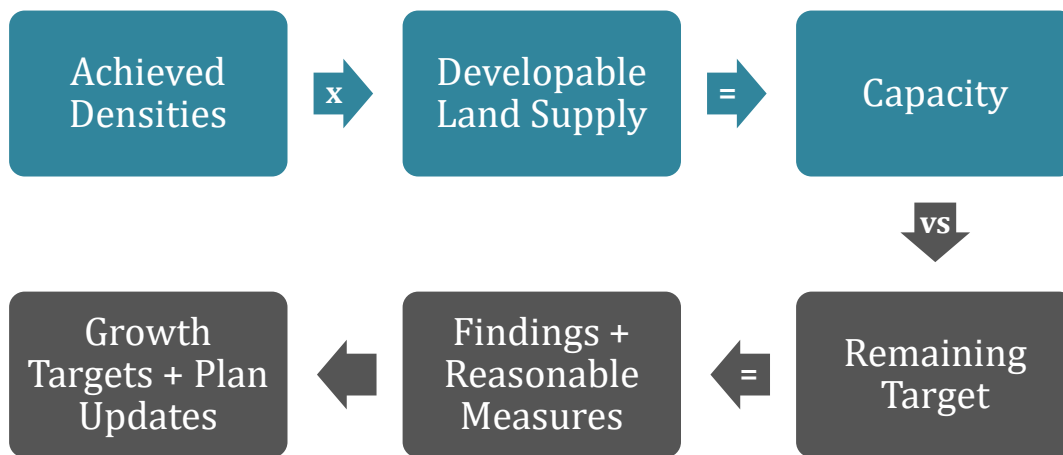
- **Ch. 5 Reasonable Measures:** This chapter explains how the county, in collaboration with cities, evaluated whether historic growth trends in each jurisdiction have been consistent with local comprehensive plans. It also presents the results of this assessment and a summary of jurisdiction responses that provide context for the quantitative assessment. Finally, this chapter identifies instances where “Reasonable Measures” are recommended to improve consistency.
- **Ch. 6 Applying Urban Growth Capacity Findings:** This chapter describes how jurisdictions can use this study and its findings to inform the next round of local comprehensive plan updates. It also presents a set of new population and employment growth targets by jurisdiction for the 2019-2044 period.
- **Ch. 7. Profiles of Cities and Unincorporated Areas:** This chapter presents detailed profiles summarizing growth trends and capacity findings for each individual jurisdiction, organized by PSRC Vision 2050 Regional Geographies.

Ch. 2 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 8 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 8. 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.

Data Review and Achieved Density Calculations

With consultant support, King County staff reviewed permit data shared by jurisdictions for reliability and consistency with guidance. When necessary, jurisdictions were engaged to make corrections or refinements. This permit data provided the basis for calculating achieved densities for residential and non-residential development between 2012-2018.

Jurisdictions aggregated permits and reported residential and non-residential development by zone. For residential permits, this reported data included developed residential units, gross acreage, and several categories for acreage deductions: non-buildable critical areas, public purpose area, and right-of-way area. After deducting these categories from gross acreage, jurisdictions reported net developed area for residential units within each zone. Residential achieved density is therefore measured as housing units per net acre, which accounts for area that is not suitable for residential development. Furthermore, summarization of permit activity by achieved density level in this report reflect the average achieved density of each zone, rather than the achieved density of each individual building permit.

For non-residential development, achieved density is measured using floor area ratio (FAR). Jurisdictions calculated the gross developed non-residential area within each zone, and made similar deductions for critical areas, public purpose area, and right-of-way area. The total floor area of non-residential development within each zone was then divided by that zone's net developed area (in square feet), which produced a zone-wide achieved density for non-residential development.

Rural Development Trends Methodology

Residential development trends on rural and resource lands were measured by residential permits issued between 2012 and 2018. Permits were geocoded by their parcel identification number or address to identify their presence outside the Urban Growth Area.

Parcel quantities, area, and current use information was provided by the King County Assessor. Supplemental development-related data (year built, residential units, and non-residential square feet) was derived from Assessor data on residential and commercial buildings. Parcels were identified as rural if their centroid was located outside of the Urban Growth Area. Parcels on resource land were identified by overlaying the parcels with current King County zoning shapefiles and selecting parcels with centroids within Agriculture, Forest, or Mineral zoned land.

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, and 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 2021 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 **underutilized** 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 a 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 and 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. 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 for every parcel (existing development divided by the parcel area) and included in the parcel data for each jurisdiction. Using the planned density of the

parcel's related zoning, jurisdictions could calculate a potential density value for each parcel. By comparing the potential and existing densities, jurisdictions could create a ratio by which to judge a parcel's redevelopability. 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 only non-buildable 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

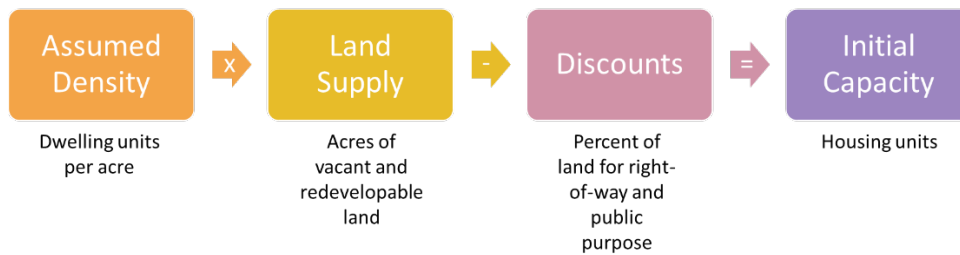
Calculating capacity was spread across two phases of data reporting. Phase 3 focused on an initial capacity calculation by zone paired with local reporting on achieved growth and densities. Phase 4 data reporting finalized urban growth capacity calculations for each jurisdiction by applying market factor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

Capacity Overview

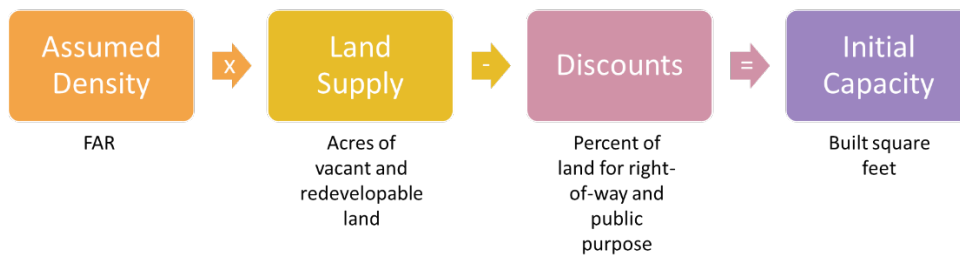
Generally, developable capacity is calculated by zone and is the product of a zone's assumed density and the area of land supply minus a percentage accounting for streets, sidewalks, and public purpose land. Achieved densities calculated in Phase 1 of data collection typically form the basis for the 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 9.

Exhibit 9. Capacity Calculation Steps

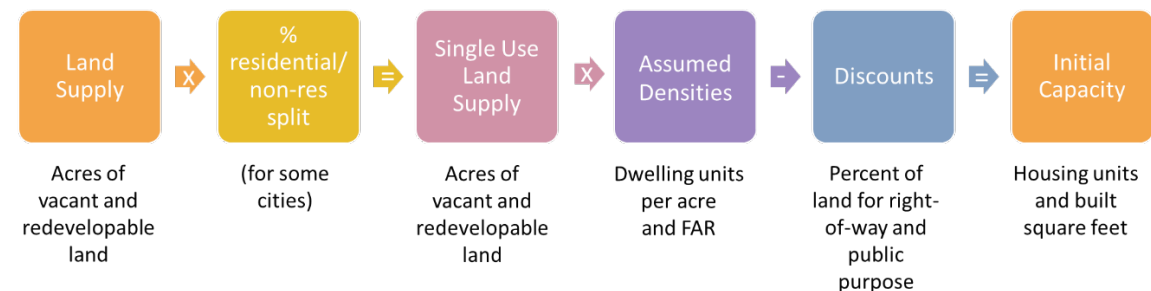
Calculating Residential Capacity



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. Except in limited circumstances, assumed densities 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 like 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 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:

$$\text{Total job capacity} = \text{Gross square footage}^4 \text{ of floor area capacity} / \text{gross square footage per job}$$

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.

⁴ 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.

Data Review, Land Supply, and Capacity Calculations

With consultant support, King County staff reviewed and summarized data received from the jurisdictions for land supply and capacity throughout Phases 2 through 4. In certain cases, jurisdictions were asked to correct or recalculate portions of the analysis due to inconsistencies discovered in the review process. In other cases, King County staff along with the consultant team reviewed and corrected calculations and sent data back to the jurisdictions for review.

This was an important step for refining the data and providing greater consistency across the entire analysis. The jurisdictions were involved in all conversations when data was changed or corrected, and all data presented in this report have been reviewed and approved by each relevant jurisdiction.

Ch. 3 Development Trends

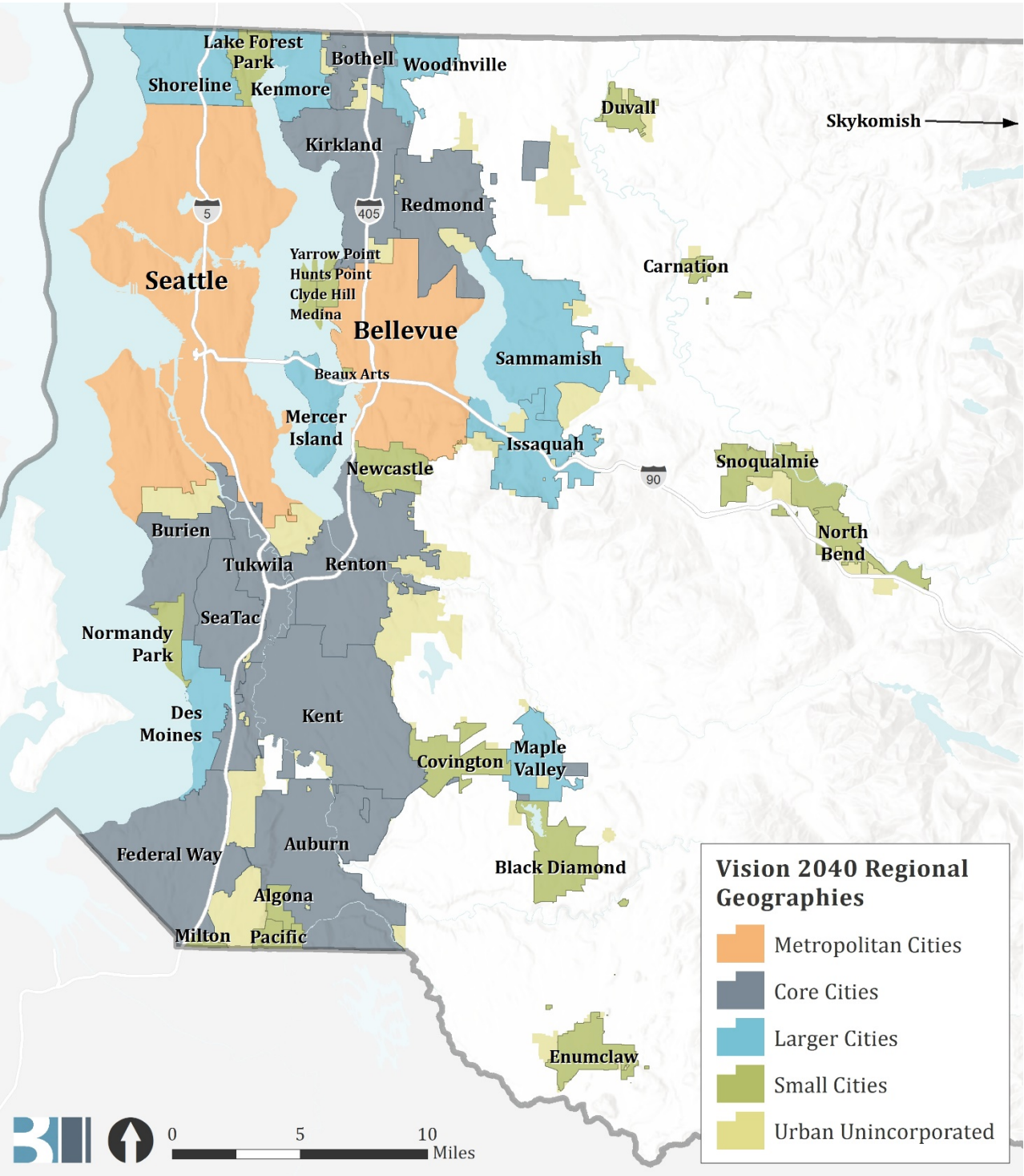
This chapter reviews residential and employment growth trends in King County between 2006 and 2018. It also compares these trends to growth targets set in the 2012 King County Countywide Planning Policies—subsequently extended to 2035.⁵ These targets include growth for the Urban Growth Area as a whole and individual jurisdictions, as well as 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 10).

Regional Geographies used in this chapter are based on Puget Sound Regional Council’s VISION 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.

The final section of this chapter summarizes development trends in rural areas.

⁵ 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 10. Map of VISION 2040 Regional Geographies Used for 2035 Growth Targets

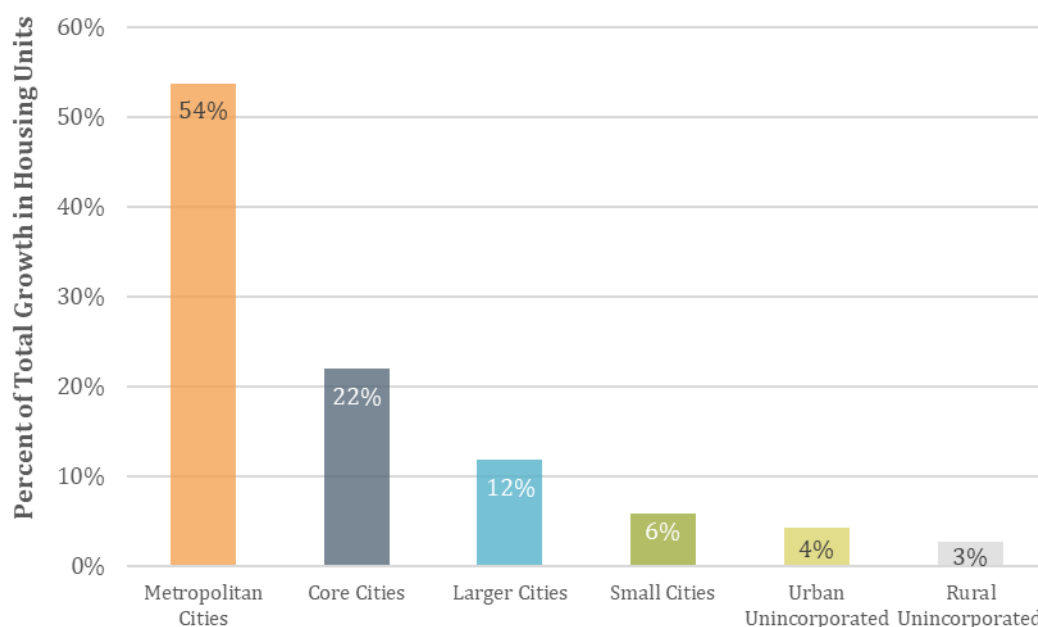


Source: PSRC VISION 2040; BERK, 2021.

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 11 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 11. Net New Housing Units by Regional Geography, 2006-2018

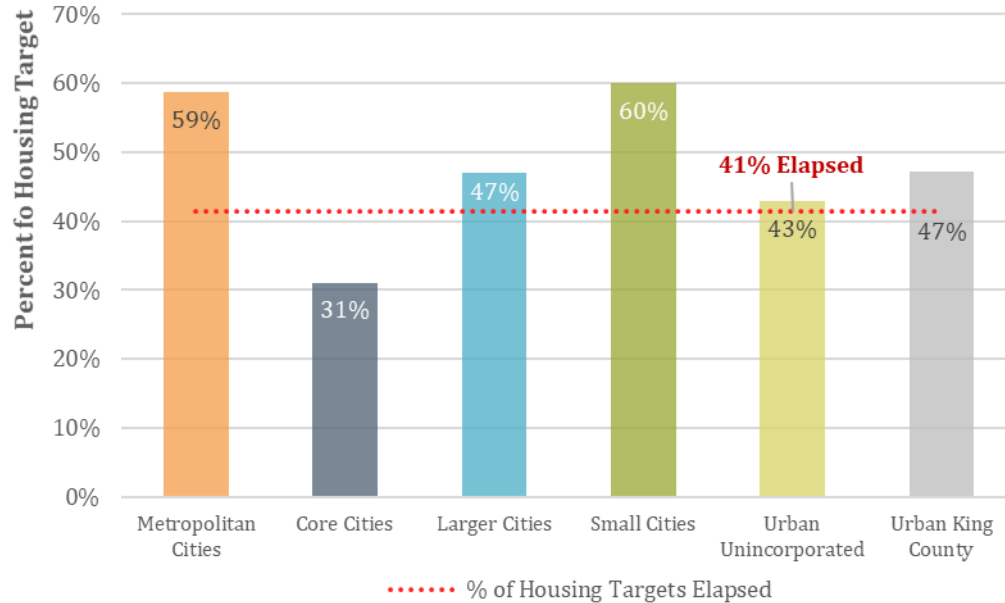


Source: King County, 2021, based on Washington State Office of Financial Management (OFM) Small Area Estimates⁶.

Consistency of Residential Growth with Adopted Targets

Urban King County is on pace to meet the 2035 countywide growth target of 276,604 net new units. Exhibit 12 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.

⁶ 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 12. Progress Towards 2035 Housing Targets, 2006-2018

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

Exhibit 13 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. Relatively few jurisdictions grew significantly slower than the target pace. Most cities that grew significantly faster than their target rate had relatively low residential targets.

Exhibit 13. 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 Unincorporated							
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.

Note that data for cities that straddle two counties include only the King County portion.

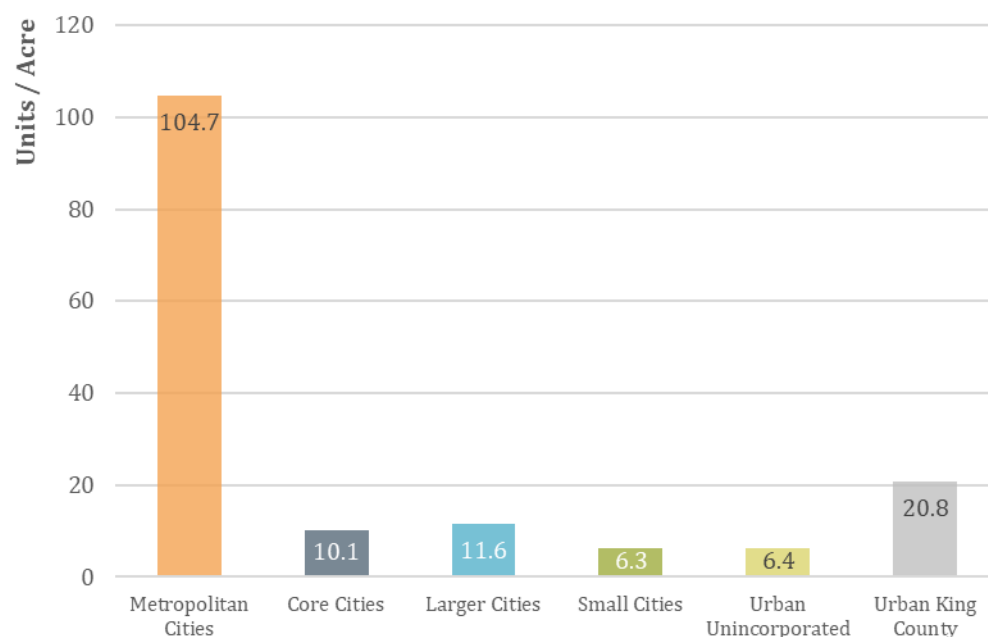
Percent of Target Pace



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 14. Metropolitan Cities permitted housing at ~105 du/acre on average, while in the remainder of the county average density ranged between 6 and 21 units per acre.

Exhibit 14. Average Achieved Density of Permitted Housing Units, 2012-2018



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

The density of new housing development is strongly related to the types of housing that are provided. This study summarizes development by density level categories⁷ that correspond to typical residential development styles. Exhibit 15 shows the categories used in the study, as well as examples of development in King County that fall into each category. Allowing for and encouraging new housing development in a variety of housing types is an important way to increase housing diversity. When a community provides a greater diversity of housing options, it can meet the housing needs of a greater diversity of household types.

⁷ Note that these density levels are based on dwelling units per *net* acre. In other words, net density measures units per acre on individual buildable lots. It excludes street rights-of-way and common areas.

Exhibit 15. Categories for Summarizing Achieved Residential Density


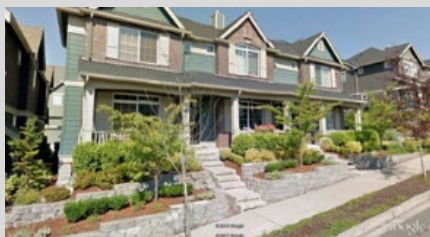

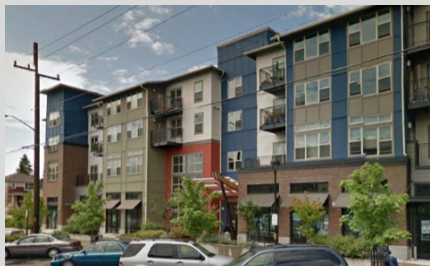
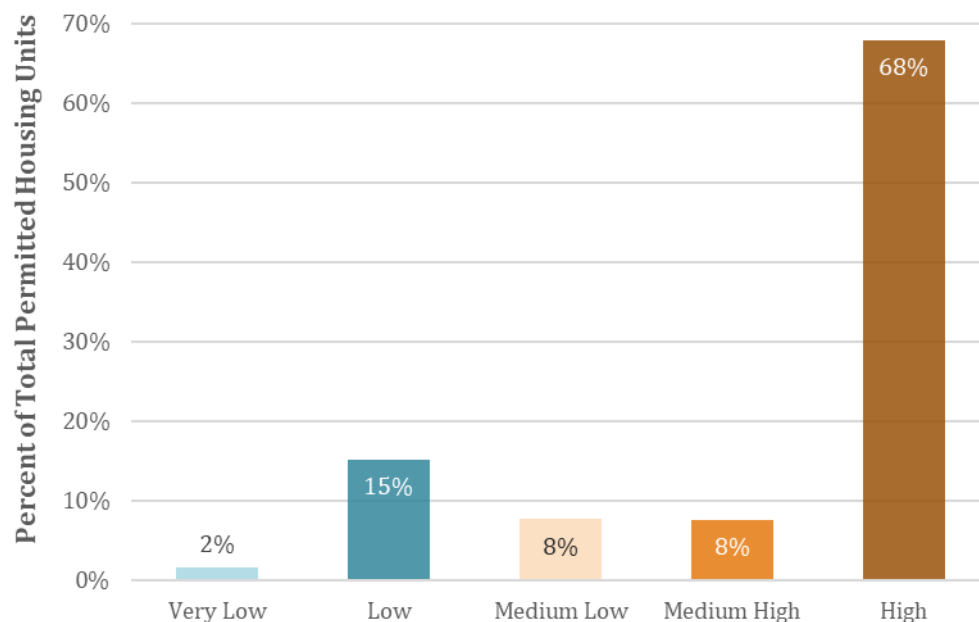
Density Level	Units per Net Acre	Description	Example
Very low	Less than 4	Detached single family homes on large lots	
Low	4-10	Detached single family homes at typical suburban density level Image: Single family neighborhood in Snoqualmie, WA	
Medium-Low	10-24	Small lot single family homes, duplex, triplex, & lower-density townhouses Image: Triplex in Issaquah Highlands, WA	
Medium-High	24-48	Low-rise apartments and condominiums; higher-density townhomes. Image: 5th Avenue condominiums in Kirkland, WA.	
High	48+	Mid- and high-rise apartments and condominiums. Image: Nia apartments in White Center (King County), WA.	

Image sources: mschellhase/flickr.com (Very Low) and Bob Bengford/Google Street View, 2017 (other categories).

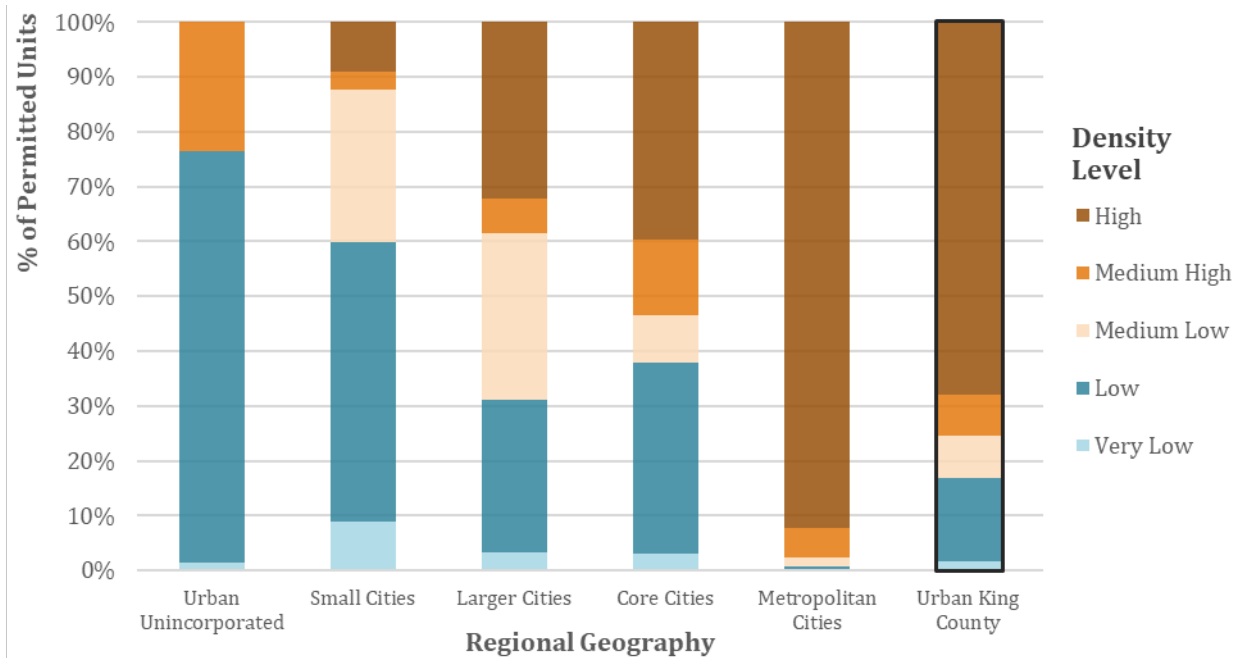
Over two-thirds of all newly permitted housing units were High density (48+ units per acre), as shown in Exhibit 16. Housing in this category would almost exclusively be in multifamily buildings such as apartments or condominiums. About 17% of all housing development was in the Low or Very Low categories, 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 16. Countywide Permitted Housing Units by Achieved Density, 2012-2018



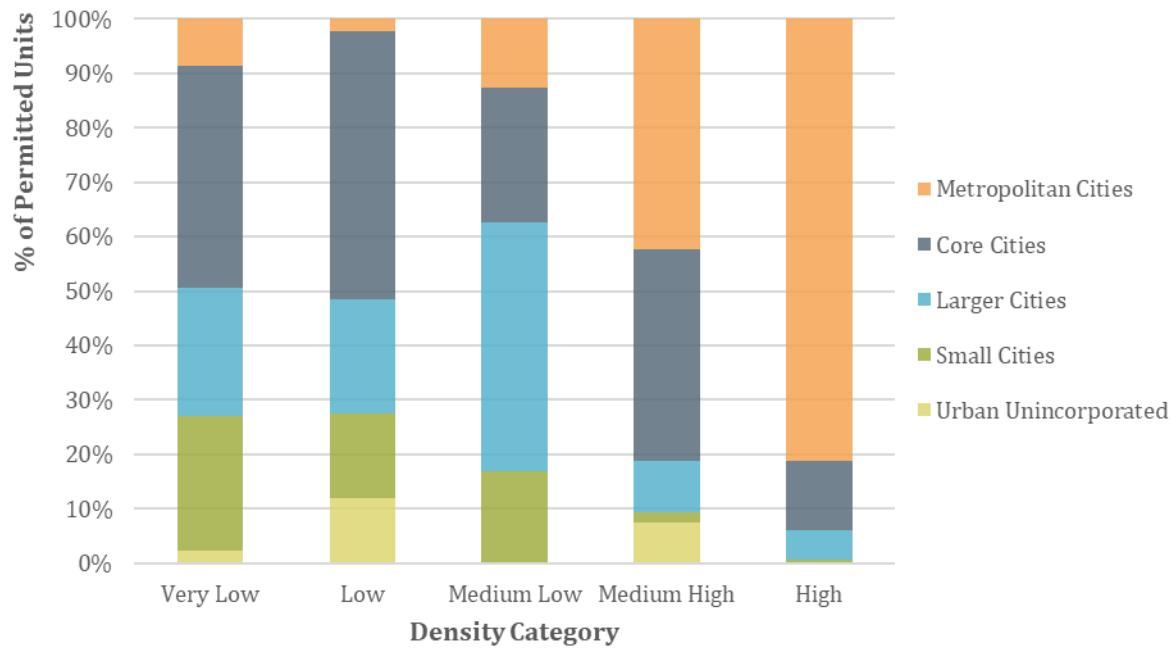
Source: BERK, 2021, based on permit data summarized by King County jurisdictions.

Exhibit 17 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.

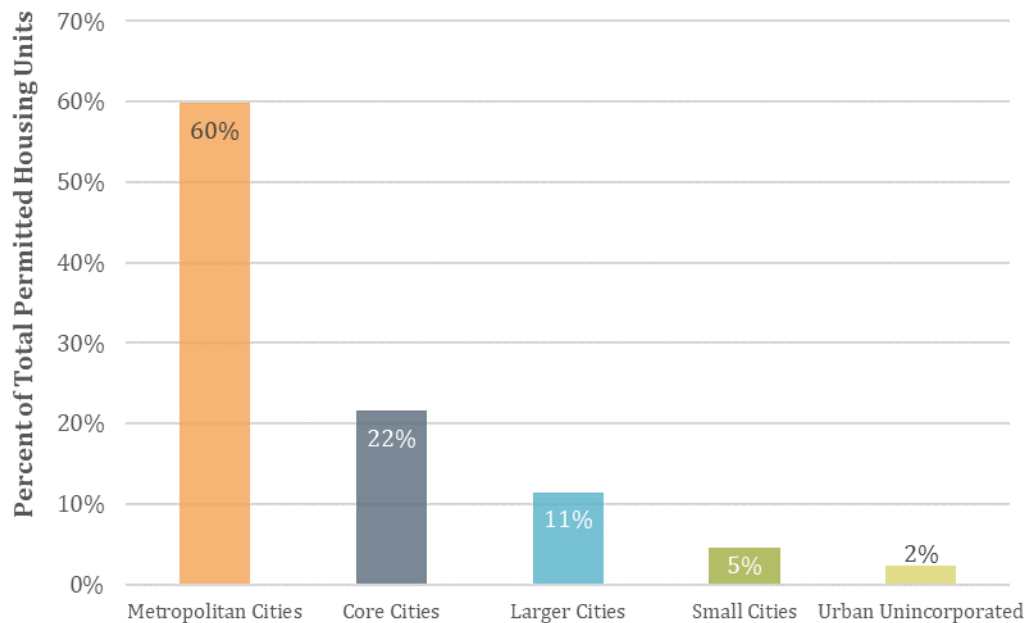
Exhibit 17. Permitted Housing Units by Regional Geography and Achieved Density, 2012-2018

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

Exhibit 18 presents the same permit data transposed to show the distribution by Regional Geography for each achieved density level. Not surprisingly, most 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 18. Permitted Housing Units by Achieved Density and Regional Geography, 2012-2018

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

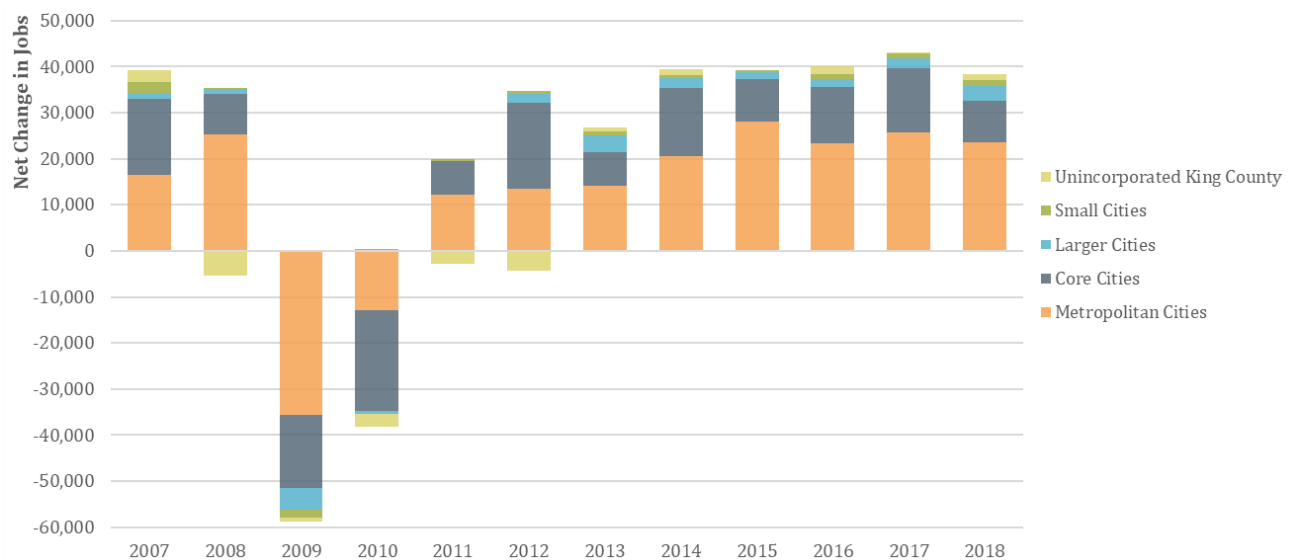
Exhibit 19. Permitted Housing Units by Regional Geography, 2006-2018

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 20 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.

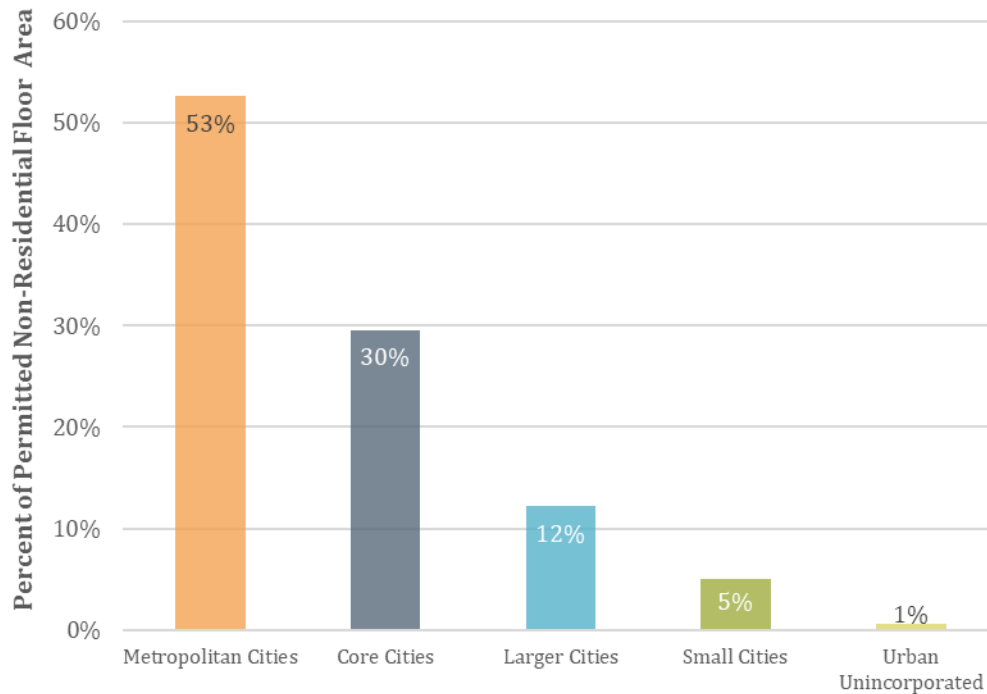
Exhibit 20: Annual Net Change in Jobs by Regional Geography, 2007-2018



Source: PSRC, 2020.

Exhibit 21 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 21. Permitted Non-Residential Floor Area by Regional Geography, 2012-2018

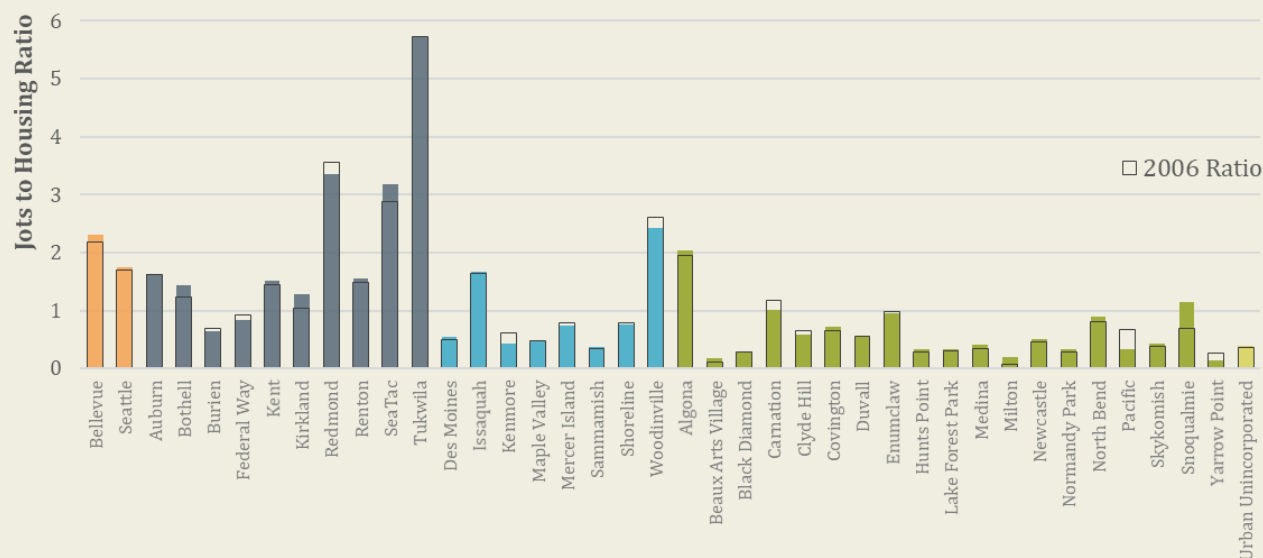


Source: BERK, 2021, based on permit data summarized by King County jurisdictions.

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.

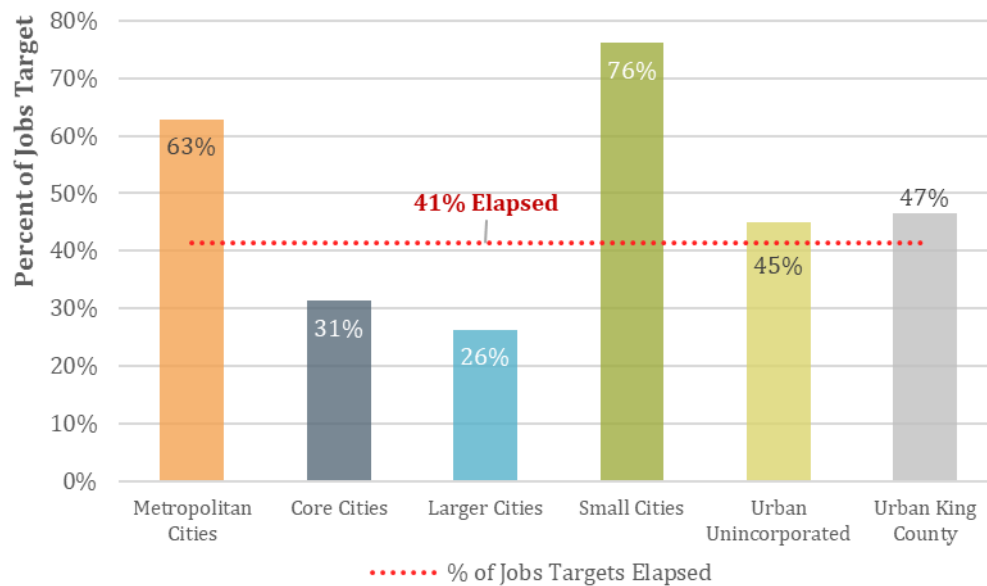
Exhibit 22. Jobs to Housing Ratio by Jurisdiction (2018 vs 2006)



Source: PSRC, 2020; OFM, 2020.

Consistency of Employment Growth with Adopted Targets

Urban King County is on pace to hit the 2035 countywide growth target of 488,659 net new jobs. Exhibit 23 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 23. Progress Toward 2035 Jobs Target by Regional Geography, 2006-2018

Source: King County, 2021; PSRC, 2020.

Exhibit 24 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 or above the target pace are shown in green, while those slower than the pace are in yellow, orange, or red.

Exhibit 24. 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%	5,754	2.5%
Federal Way	31,616	14,268	(468)	31,148	-8%	14,268	2.7%
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%	135,455	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%	3,480	5.1%
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%	35,537	2.3%
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%	429	3.0%
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%	4,275	0.8%
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



Achieved Non-Residential Density

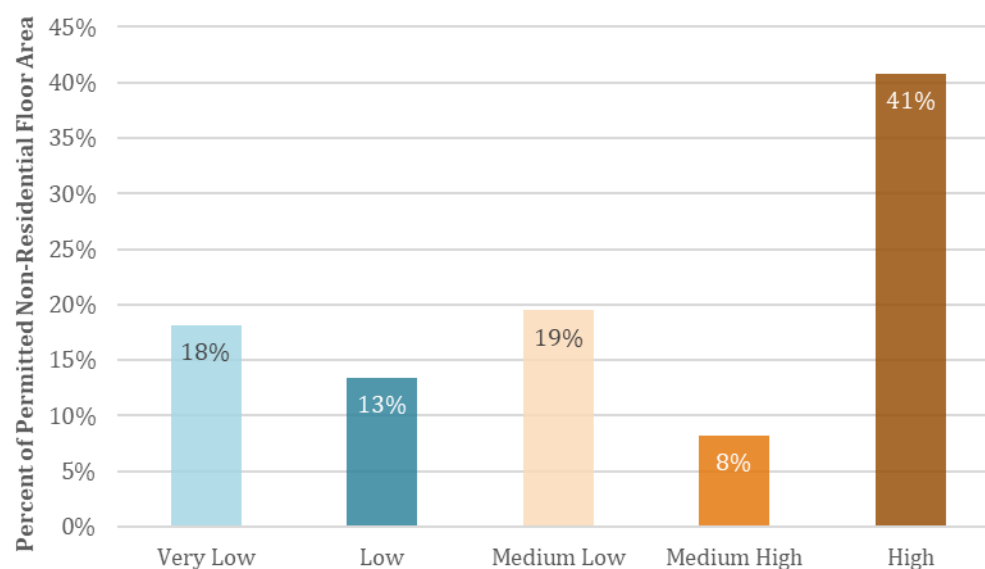
For non-residential construction that occurred between 2012 and 2018, jurisdictions evaluated achieved density in floor area ratio (FAR). This metric compares the built floor area of structures to the total area of the parcel. For multistory buildings, this method sums floor area on each story. This 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 25.

Exhibit 25. 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 26. Medium-Low and Very Low were the two next common density levels. Medium-High was the least common with only 8% of all development.

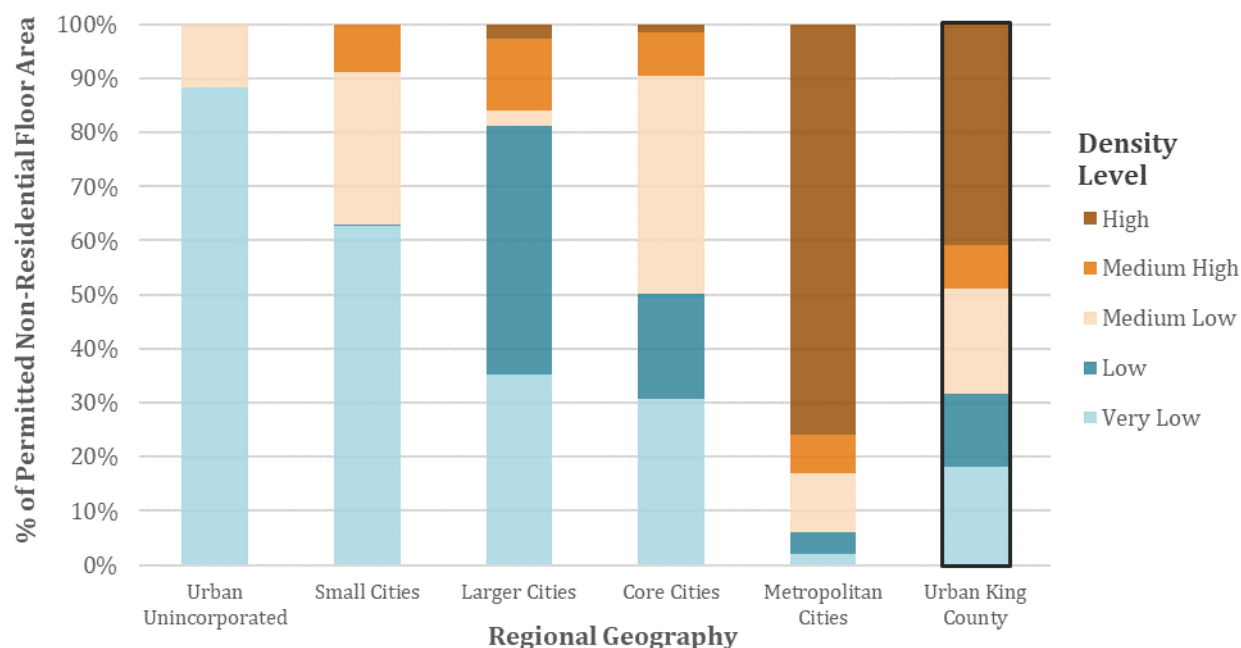
Exhibit 26. Permitted Non-Residential Development by Achieved Density Level, 2012-2018



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

Exhibit 27 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.

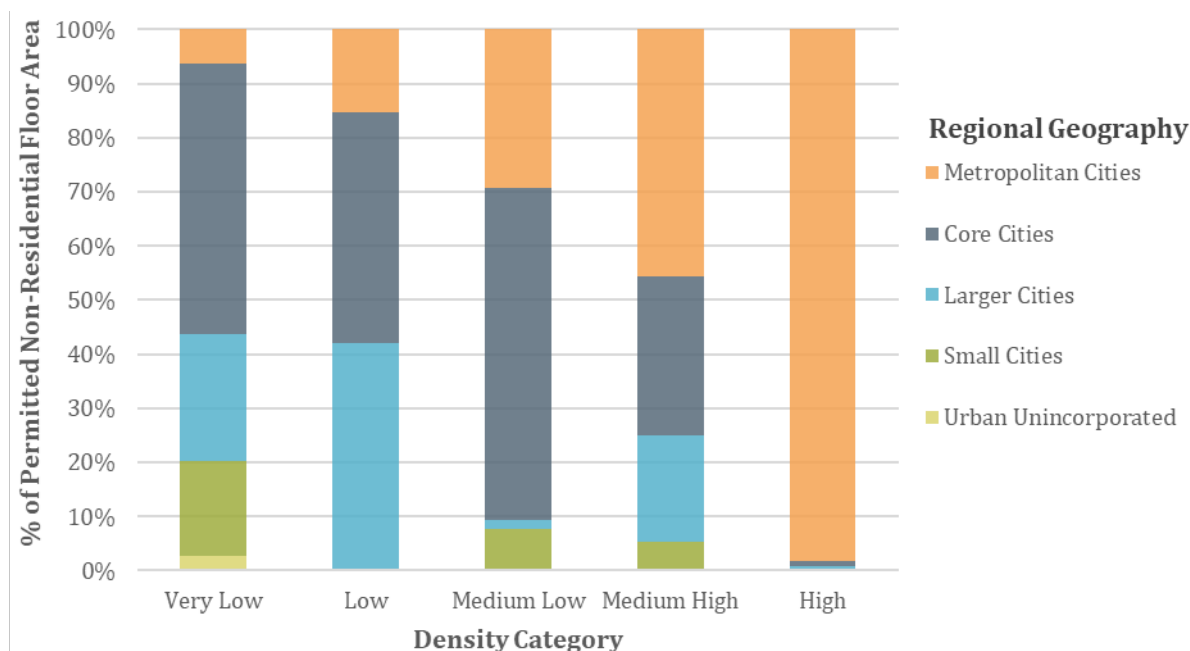
Exhibit 27. Permitted Non-Residential Development by Regional Geography and Achieved Density, 2012-2018



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

Exhibit 28 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 28. Permitted Non-Residential Development by Achieved Density and Regional Geography, 2012-2018



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

Rural Development Trends

While the purpose of the Urban Growth Capacity Report is to analyze urban development trends and determine whether King County and its cities have sufficient capacity within the Urban Growth Area to accommodate the county's forecasted population and job growth, RCW 36.70A.215 (2) requires analysis of land uses and development outside the UGA. Such information can be useful in analysis of residential trends and to assist the county in directing its programs to areas of greatest need. It is also helpful in analyzing links between urban and rural growth trends. This report examines growth trends on rural and resource lands during the 2012-2018 evaluation period.

Rural Areas and Resource Lands in King County

The landscape of King County's rural and resource areas is characterized by extensive forests, small-scale farms, free-flowing streams, and a variety of residential housing—mostly at very low densities. There is no growth target for rural or resource areas. Their role is as supplier of resources including timber and agricultural products with primary characteristics including:

- Rural areas cover approximately 300 square miles of King County (15% of the land area), including all of Vashon Island and a band of territory east of the contiguous UGA.
- Resource lands—including designated Forest and Agricultural Production Districts and Mineral Lands—cover about 1,350 square miles, or nearly 65% of King County's total land area.

- By contrast, the entire King County UGA covers 460 square miles, less than 22% of the county's land area.
- Together, the rural- and resource-designated areas cover more than three-fourths of the county's land area but contain only 130,000 people, about 6% of the county's total population.
- The Countywide Planning Policies (CPPs) assume only a small fraction of King County's residential growth will occur in rural and resource areas; staff projected about two percent of countywide growth for the 2006-35 planning period.

Growth Trends Outside the Urban Growth Area

A major goal of the King County Comprehensive Plan and the Countywide Planning Policies is to focus growth into the Urban Growth Area. As Ch. 4 Growth Capacity demonstrates, King County's Urban Growth Area has sufficient capacity to accommodate its entire growth target. Prior to the adoption of the Growth Management Act in 1991, about 10-14% of each year's new residential units were built outside the UGA. Following adoption of the county Comprehensive Plan in 1994, the percent of growth in rural areas declined precipitously. While permitting in rural King County increased as growth returned to King County following the Great Recession, it remains a small percentage of the county's overall growth. Since 2012, only about 1.5% of new units have been developed outside the UGA, as shown in Exhibit 29. These findings demonstrate that King County is succeeding in directing growth to—and accommodating growth within—the Urban Growth Areas.

Exhibit 29. Permit Trends on Rural and Resource Lands

Year	Total Units Permitted	Units Permitted in the Rural Area	Rural Percent of County total
2012	12,191	92	0.8%
2013	11,688	138	1.2%
2014	13,350	201	1.5%
2015	13,620	215	1.6%
2016	13,300	244	1.8%
2017	14,700	278	1.9%
2018	17,400	260	1.5%

Source: King County/Puget Sound Regional Council, 2020

Key Development Findings on Rural and Resource Lands

The major findings regarding land uses and activities in the rural areas and on resource lands are as follows:

- There are approximately 48,300 existing housing units on rural and resource lands (approximately 43,500 units on rural and 4,800 units on resource lands).
- An average of about 200 new residential units per year were permitted on rural and resource lands between 2012 and 2018.
- This small amount of growth is expected to continue, consistent with the assumption in the CPPs of a small fraction of residential growth occurring in rural areas and resource lands.
- Of approximately 66,000 total parcels in rural and resource areas, about 56,000 are developed with residential, commercial, public, or open space use. Another 10,000 parcels are vacant or in an accessory use.
- Many parcels in rural areas are smaller than the minimum lot size because they were created before current zoning was in place.
- At current rates of residential permitting, the rural area will still have undeveloped lots at the end of the planning period in 2035.

For commercial and industrial uses on rural and resource lands, the major findings are as follows:

- There are approximately 150 vacant parcels zoned for commercial or industrial uses in rural and resource lands, covering over 2,000 acres.
- Approximately 40 of these parcels are on designated resource land, accounting for over half of the vacant non-residential area, nearly 1,200 acres.
- A limited amount of non-residential development occurred on rural parcels from 2012-2018. Most non-residential development was school or church buildings.
- Excluding the school, church, and accessory development, approximately 50,000 square feet of development was constructed across 6 different developments.

Ch. 4 Growth Capacity

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.

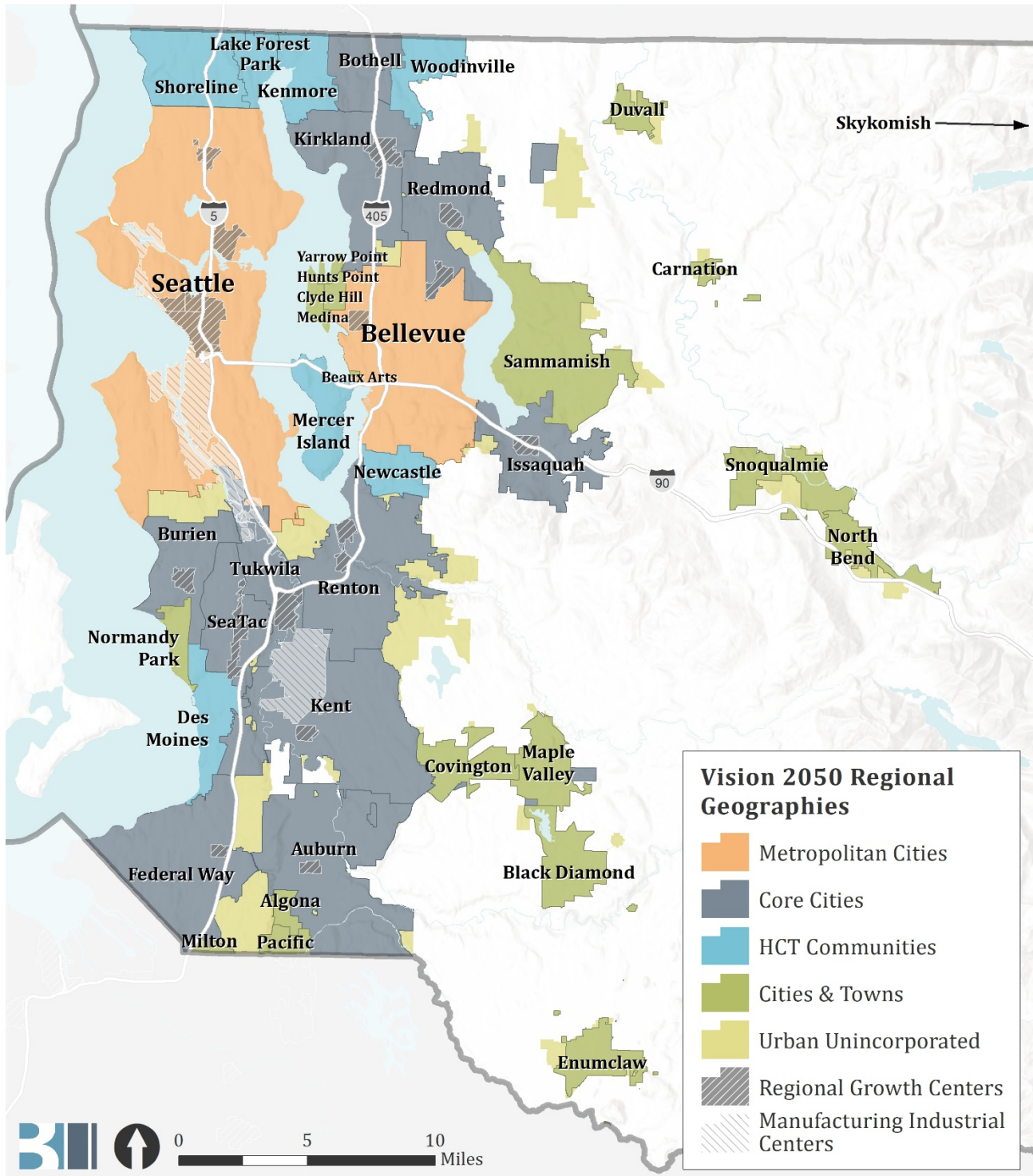
PSRC designated three unincorporated potential annexation areas (PAAs), Federal Way PAA, North Highline PAA, and Renton PAA, as HCT Communities. However, for capacity results in this chapter, data for HCT Communities excludes all unincorporated areas and groups the PAAs into the Urban Unincorporated areas. See Exhibit 30 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.

General Findings

Urban King County has growth capacity of 406,124 housing units and 612,952 jobs in the urban areas of the county. This capacity is distributed within jurisdictions across the county, as shown in Exhibit 31. 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.⁸

⁸ These cities include Auburn, Bothell, Milton, and Pacific.

Exhibit 30. Map of VISION 2050 Regional Geographies

Sources: PSRC VISION 2050; BERK, 2021.

Exhibit 31. 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	7%	7,927	4%
Bothell	6,370	5%	9,335	5%
Burien	10,816	8%	752	0%
Federal Way	14,077	11%	29,500	15%
Issaquah	14,103	11%	15,561	8%
Kent	11,248	9%	28,995	14%
Kirkland	13,352	10%	18,139	9%
Redmond	17,777	14%	15,851	8%
Renton	16,503	13%	26,210	13%
SeaTac	6,396	5%	15,565	8%
Tukwila	8,219	6%	33,749	17%
Subtotal	128,011		201,584	
HCT Communities				
Des Moines	8,386	17%	2,410	14%
Kenmore	4,135	9%	3,881	23%
Lake Forest Park	1,870	4%	691	4%
Mercer Island	1,607	3%	961	6%
Newcastle	3,234	7%	680	4%
Shoreline	25,590	53%	3,953	23%
Woodinville	3,705	8%	4,373	26%
Subtotal	48,527		16,950	
Cities & Towns				
Algona	266	1%	313	1%
Beaux Arts	2	0%	0	0%
Black Diamond	8,434	37%	3,188	11%
Carnation	704	3%	2,864	10%
Clyde Hill	5	0%	28	0%
Covington	4,609	20%	8,421	28%
Duvall	1,343	6%	681	2%
Enumclaw	1,308	6%	1,152	4%
Hunts Point	5	0%	0	0%
Maple Valley	2,221	10%	1,784	6%
Medina	8	0%	0	0%
Milton	66	0%	1,213	4%
Normandy Park	135	1%	35	0%
North Bend	2,098	9%	5,759	19%
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	22,903		29,899	
Urban Unincorporated				
Subtotal	7,386		1,680	
Total Urban Capacity:	406,124	Housing Units	612,952	Jobs

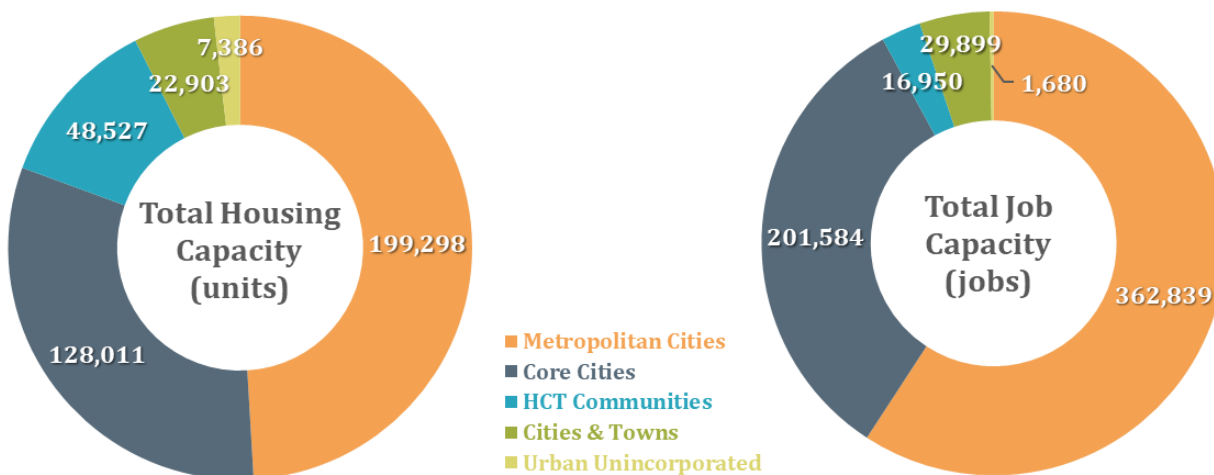
Sources: BERK, 2021; Data provided by individual King County jurisdictions, 2020-2021.

Findings by Regional Geography

Exhibit 32 summarizes housing and job capacity in King County, with breakdowns by VISION 2050 Regional Geographies. Nearly half of all housing capacity is in the Metropolitan Cities (Seattle and Bellevue), with another 32% 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 in the HCT Communities, Cities & Towns, or Urban Unincorporated categories. HCT Communities have a much higher relative share of housing capacity with 12% of countywide total, compared to only 3% of countywide job capacity.

Exhibit 32. 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	49%		362,839	59%	
Core Cities	128,011	32%		201,584	33%	
HCT Communities	48,527	12%		16,950	3%	
Cities & Towns	22,903	6%		29,899	5%	
Urban Unincorporated	7,386	2%		1,680	0.3%	
Total Urban Capacity	406,124	Housing Units		612,952	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. 3.

Exhibit 33. 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

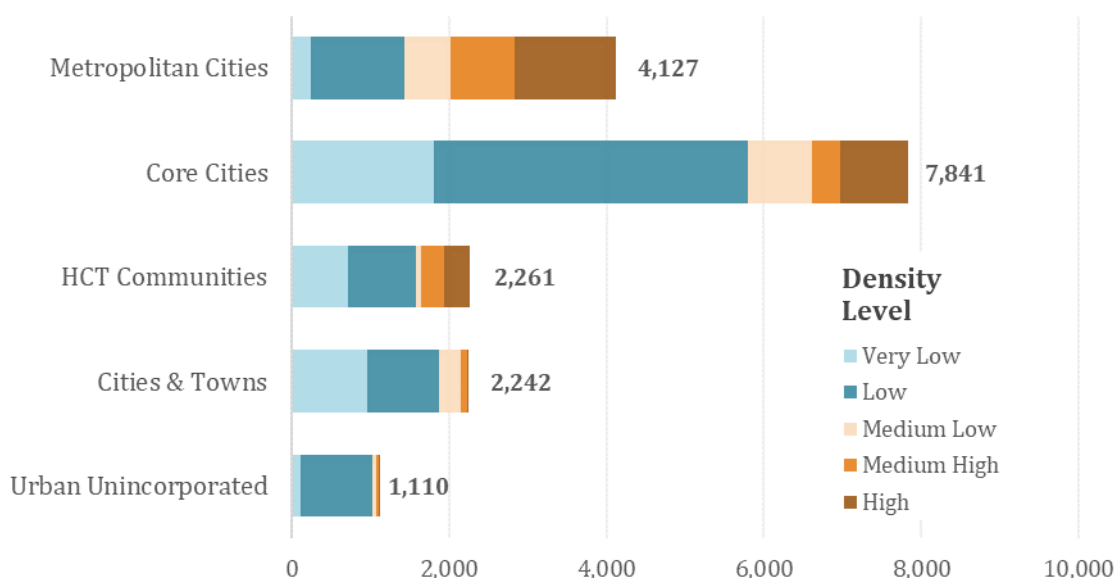
Residential Land Supply

Exhibit 34 and Exhibit 35 show the breakdown of the net buildable land for residential development after all deductions have been made. Deductions include the removal of non-buildable 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 17,581 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 34. Buildable Residential Land by Assumed Density (acres)

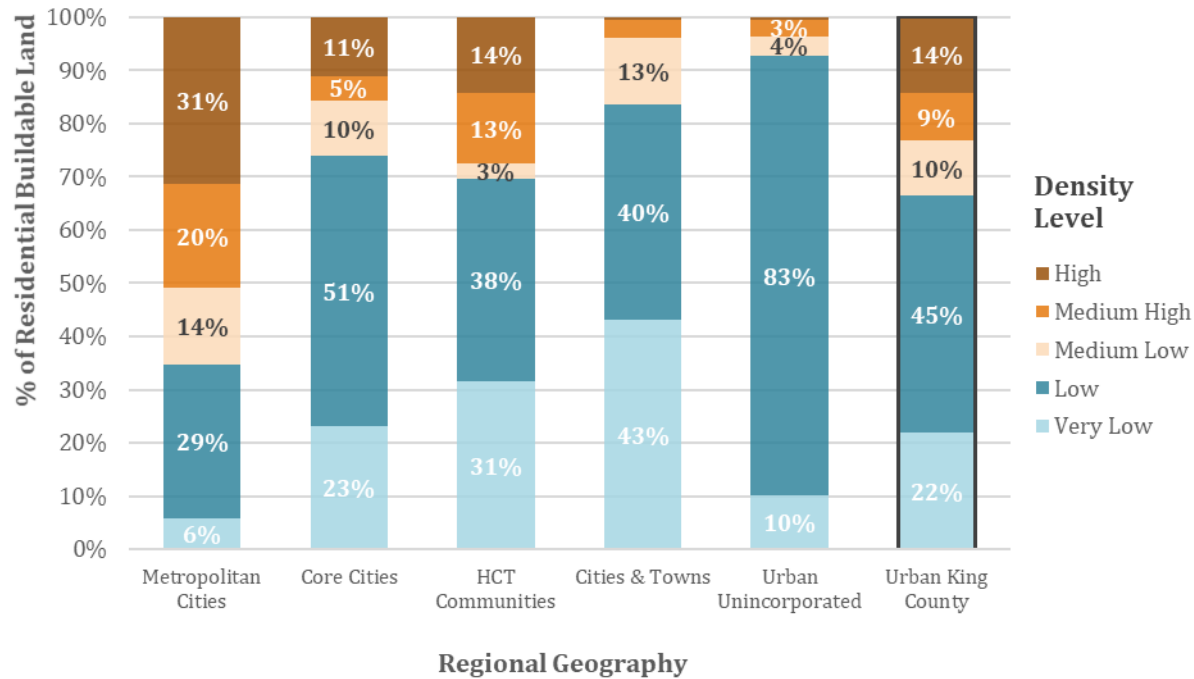
Vision 2050 Geography	Assumed Density					Total	
	Very Low	Low	Medium Low	Medium High	High	#	%
Metropolitan Cities	244	1,190	590	810	1,293	4,127	23%
Core Cities	1,807	3,985	819	363	867	7,841	45%
HCT Communities	712	864	63	302	321	2,261	13%
Cities & Towns	965	906	284	76	11	2,242	13%
Urban Unincorporated	108	921	41	33	6	1,110	6%
Urban King County	3,837	7,865	1,797	1,584	2,498	17,581	100%



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

Exhibit 35 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 (27%) than Core Cities (16%), likely reflecting a relatively larger share of land in zones established to support transit-oriented residential and mixed-use development.

Across the entire county, two-thirds of residential land supply falls into the Low or Very Low density levels, with just 23% 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 35. Percent of Residential Buildable Land by Regional Geography and Assumed Density

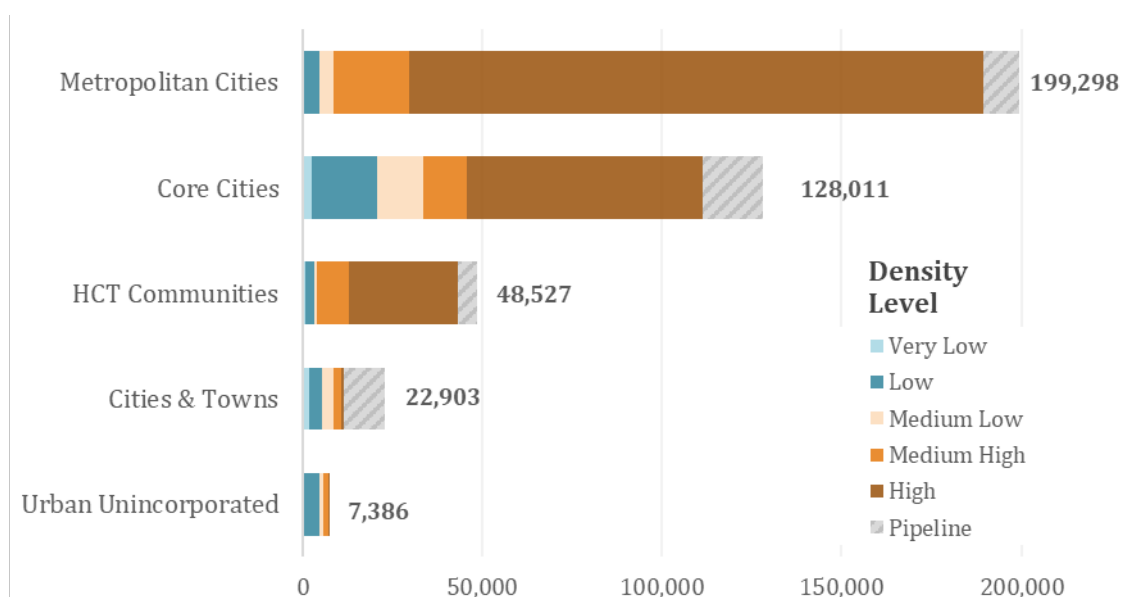
Sources: BERK, 2021; Data provided by individual King County jurisdictions, 2020-2021.

Residential Unit Capacity

Exhibit 36 and Exhibit 37 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 36. Housing Capacity by Assumed Density (units)

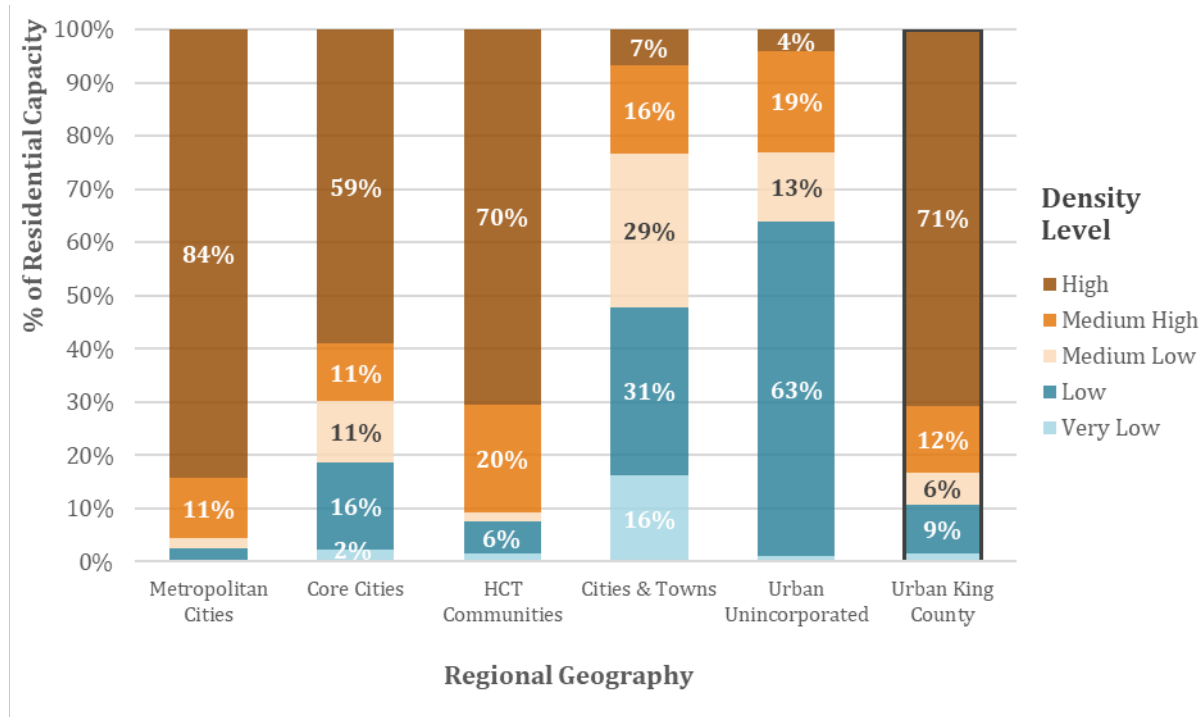
Vision 2050 Geography	Assumed Density						Total	
	Very Low	Low	Medium Low	Medium High	High	Pipeline	#	%
Metropolitan Cities	438	4,308	3,803	21,053	159,711	9,984	199,298	49%
Core Cities	2,555	18,307	12,778	11,991	65,645	16,734	128,011	32%
HCT Communities	622	2,649	679	8,851	30,486	5,239	48,527	12%
Cities & Towns	1,846	3,558	3,265	1,860	770	11,604	22,903	6%
Urban Unincorporated	68	4,656	964	1,400	298	0	7,386	2%
Urban King County	5,529	33,479	21,490	45,155	256,910	43,561	406,124	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 128,000 housing units in Core Cities. These two VISION 2050 geographies make up about 80% of urban housing unit capacity in King County. The remaining 20% of capacity found in HCT Communities, with capacity for just under 50,000 housing units; Cities & Towns, with capacity for nearly 23,000 housing units; and the Urban Unincorporated areas, with capacity for nearly 7,400 housing units.

Exhibit 37 shows the percent breakdown of housing unit capacity by assumed density level. Countywide, 71% of urban housing capacity (nearly 257,000 units) is in High density zones (see also Exhibit 36). Almost all the housing capacity in Metropolitan Cities is in High density zones, and in Core Cities and HCT Communities, most of the 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 37. 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. 3.

Exhibit 38. 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.

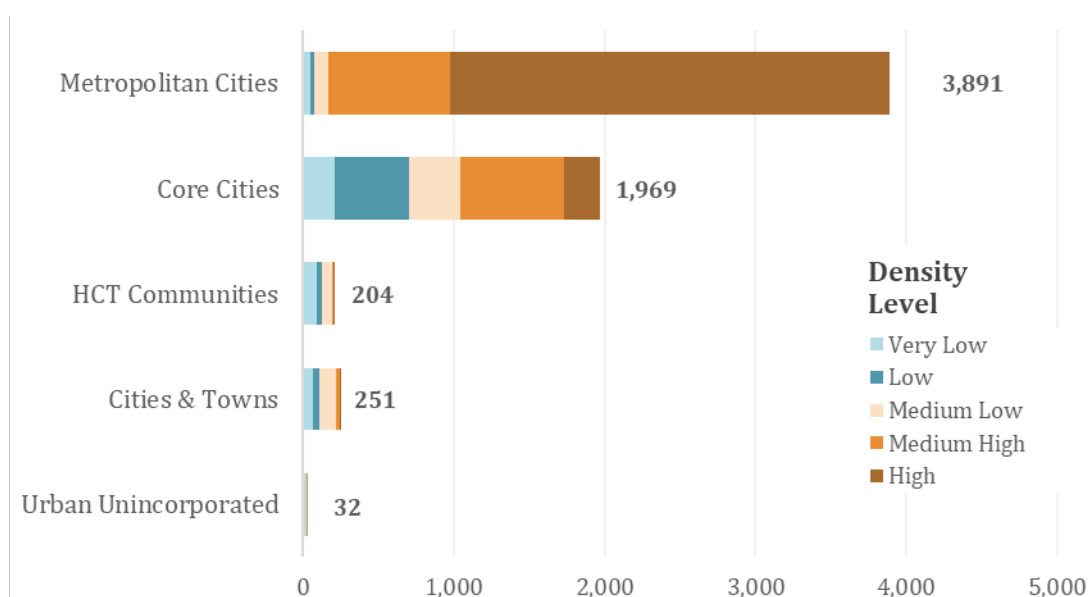
Nonresidential Land Supply

Exhibit 39 and Exhibit 40 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 39. Buildable Non-Residential Land by Assumed Density (acres)

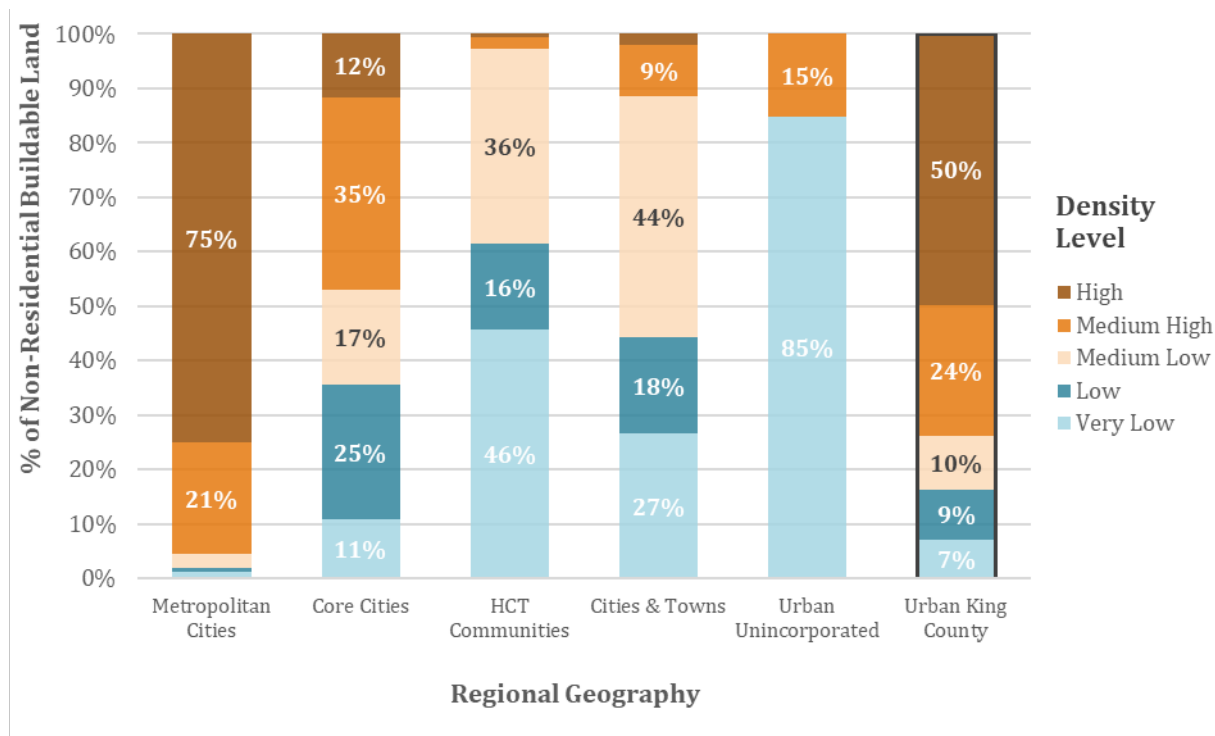
Geography	Assumed Density Level					Total	
	Very Low	Low	Medium Low	Medium High	High	#	%
Metropolitan Cities	51	24	98	800	2,919	3,891	61%
Core Cities	212	490	343	691	232	1,969	31%
HCT Communities	93	32	73	5	1	204	3%
Cities & Towns	67	45	111	24	5	251	4%
Urban Unincorporated	27	0	0	5	0	32	1%
Urban King County	450	591	624	1,524	3,158	6,347	100%



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

There are roughly 6,350 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 30).

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 40. 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.

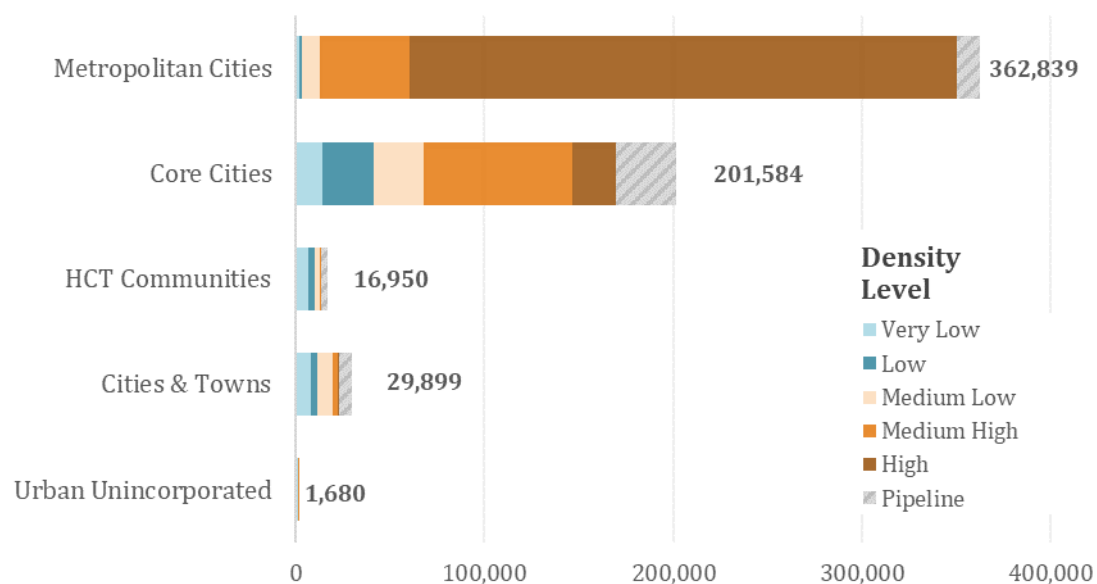
Across all of urban King County, half of land available for non-residential development is at the High assumed density level, with the 24% in the Medium-High level, and the remaining land supply spread across the lower assumed density levels. Similar to the residential side of land supply, the Metropolitan 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 41 and Exhibit 42 show non-residential growth capacity in terms of jobs, broken down by assumed density level and pipeline capacity.

Exhibit 41. 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	9,593	47,015	290,561	12,278	362,839	59%
Core Cities	13,828	27,289	26,427	78,837	23,229	31,973	201,584	33%
HCT Communities	6,404	3,885	2,586	686	124	3,265	16,950	3%
Cities & Towns	7,668	3,761	8,113	2,725	747	6,884	29,899	5%
Urban Unincorporated	1,251	0	0	429	0	0	1,680	0%
Total	30,850	36,629	46,719	129,693	314,662	54,399	612,952	100%



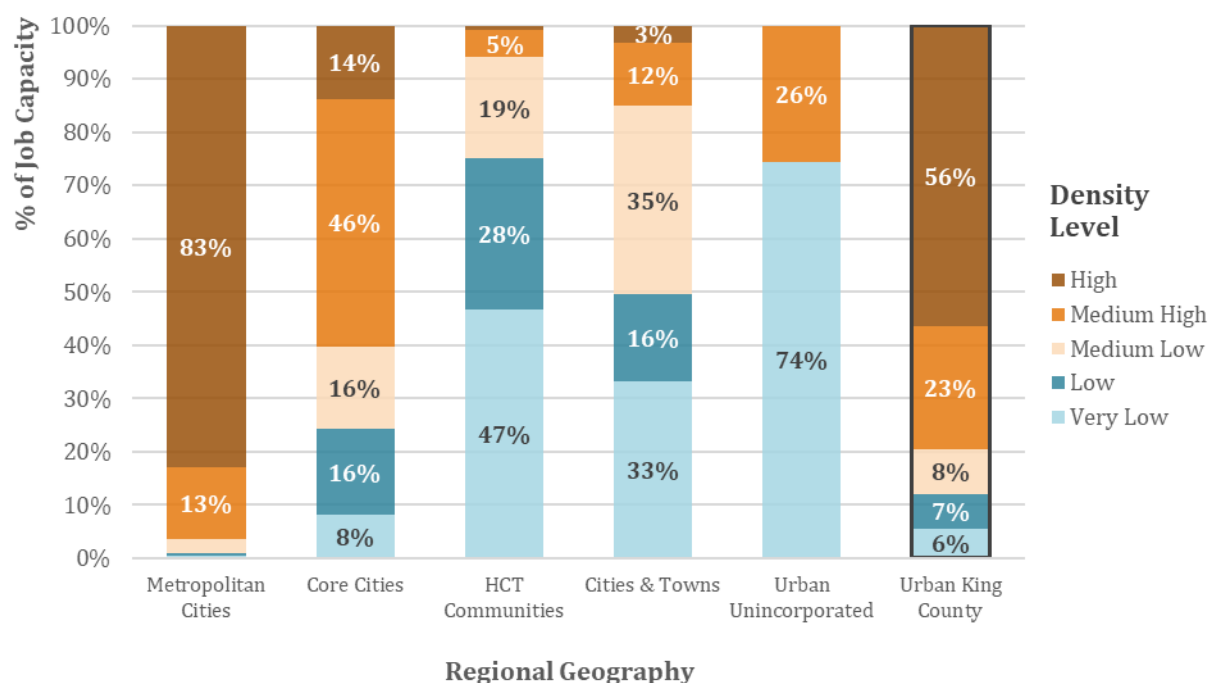
Sources: BERK, 2021; Data provided by individual King County jurisdictions, 2020.

The Metropolitan Cities have capacity for over 360,000 jobs, 59% 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 314,662 jobs in the High assumed density level, with 290,561 of those found in Metropolitan Cities.

Capacity for another 201,584 jobs is found in Core Cities, 33% of total urban job capacity in King County. This capacity is more evenly spread across the various assumed density levels, with a 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 42 shows the percent breakdown of job capacity by density levels within the VISION 2050 Regional Geographies.

Exhibit 42. 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, 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.

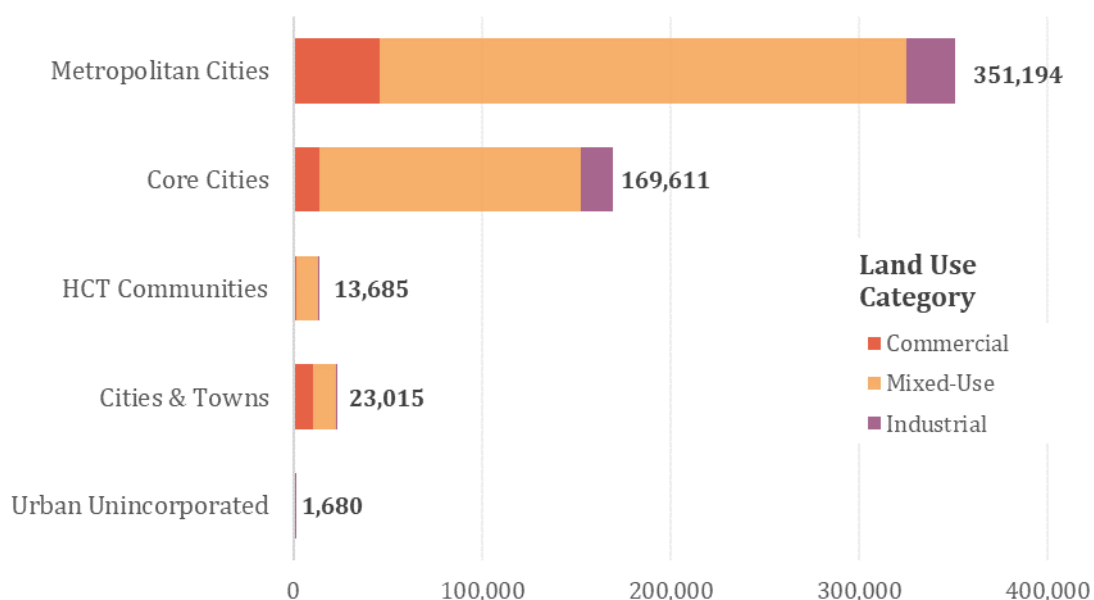
Job Capacity by Land Use Type

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.⁹

⁹ 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 43. Non-Pipeline Job Capacity by Land Use Type (jobs)

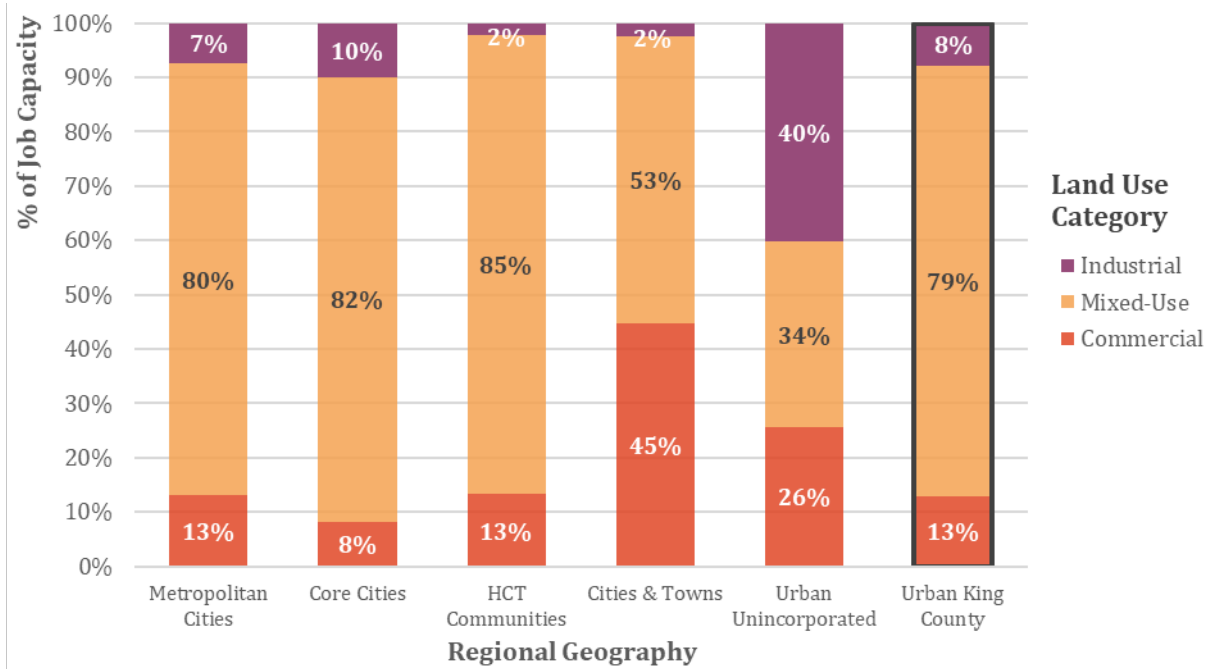
Geography	Land Use Type			Total
	Commercial	Mixed-Use	Industrial	
Metropolitan Cities	45,952	279,313	25,929	351,194
Core Cities	14,033	138,563	17,015	169,611
HCT Communities	1,813	11,564	308	13,685
Cities & Towns	10,271	12,180	565	23,015
Urban Unincorporated	429	574	677	1,680
Urban King County	72,499	442,193	44,494	559,185



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

Across all geographies, most of the job capacity is found in mixed-use zones. In urban King County, there is capacity for over 442,193 jobs in mixed-used zones, over 72,000 jobs in commercial zones, and nearly 45,000 jobs in industrial zones. In Metropolitan Cities alone, there is capacity for near 280,000 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 44. 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 80% of job capacity is found in mixed-use zones. Countywide, 79% 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 45%, whereas all other geographies have between just 8%-26% of job capacity found in commercial zones.

Ch. 5 Reasonable Measures

As discussed in Chapter 1, the GMA requires that certain counties and cities, including King County, conduct an analysis to determine if land is being used efficiently in urban growth areas (UGAs), and to determine if growth is occurring consistent with adopted comprehensive plans. If this review and evaluation demonstrates inconsistencies between actual growth and planning goals, the jurisdiction is required to identify Reasonable Measures that could be taken to improve consistency other than adjusting UGA boundaries. Examples of Reasonable Measures include rezones, subarea planning, permitting process streamlining, or development incentives. Any Reasonable Measures selected to address inconsistencies are required to be adopted in comprehensive plans and monitored annually. Prior to the Urban Growth Capacity study, King County and its jurisdictions did not have any adopted Reasonable Measures.

This chapter reviews findings of the Urban Growth Capacity Study to determine whether new Reasonable Measures are necessary to align growth trends with planning goals or to ensure there is sufficient capacity for accommodating growth. The process includes three steps. First, the County measured consistency between actual growth and planning goals using a set of standard criteria. Second, jurisdictions reviewed findings and considered circumstances that may have contributed to observed inconsistencies. Third, based on this review, jurisdictions determined if Reasonable Measures were necessary to address observed inconsistencies. The following sections describe this process and document outcomes.

Criteria for Evaluating Consistency

The first step was developing criteria for determining where there are potential inconsistencies between actual growth trends and planning goals. King County developed these criteria with input from the UGC Technical Committee and Interjurisdictional Team. Exhibit 45 presents each consistency check, as well as a summary of the method used to evaluate consistency.

Exhibit 45. Criteria for Identifying Potential Inconsistencies

Consistency Check	Evaluation Method/Criteria
Are achieved densities consistent with planned densities?	<ul style="list-style-type: none"> Group all zones by planned/allowed density level. For each density level, calculate aggregate achieved density for all development observed 2012-2018. Compare aggregate achieved density to the range of allowed densities among all zones in that density level. There is a potential inconsistency if <i>both</i> of the following conditions are true: <ul style="list-style-type: none"> Average achieved density is outside of this range of allowed density. Average achieved density is below 50% of the max allowed density.
Is the rate of growth consistent with the 2035 growth target?	<ul style="list-style-type: none"> Calculate the elapsed 2035 growth target for the period of 2006-2018: about 41% of the total growth target. Compare actual growth to elapsed target. If actual growth is less than 50% of the elapsed target, then there is a potential inconsistency.
Is there capacity for accommodating the 2035 growth target?	<ul style="list-style-type: none"> Calculate the remaining growth needed to achieve the 2035 growth target. If capacity for growth is less than the remaining growth target, then there is a potential inconsistency.

Summary of Potential Inconsistencies

This section summarizes the findings of the consistency checks described above.

Achieved Densities

Exhibit 46 summarizes the analysis of potential inconsistencies between average achieved residential densities between 2012 and 2018, and density levels allowed under zoning. Consistency is evaluated for development within each of the five density levels used for summarizing growth trends and capacity throughout this report. The symbols indicate where there is and is not a potential inconsistency identified. A more detailed presentation of the data that backs up both of these exhibits can be found in Ch. 7 Profiles of Cities and Unincorporated Areas.

Exhibit 47 presents this same summarization for achieved non-residential densities. It shows many cities with average achieved densities below 50% of maximum allowed density for the zone category. When interpreting these findings, keep in mind that maximum allowed densities in this report are measured in terms of floor area ratio (FAR). Many jurisdictions do not use FAR as a standard of density, and reporting maximum allowed densities often involved converting development standards such as height, bulk, and/or setback requirements to very roughly estimate FAR. In reality, achievable FAR under these development standards may vary significantly by parcel. And some requirements such as building heights may be in place to accommodate portions of structures (e.g., facades, chimneys, or signage) and were never intended to accommodate multistory buildings. These kinds of issues were considered in the jurisdictional review of potential inconsistency findings, as discussed in the following section.

Exhibit 46. Consistency of Achieved Residential Densities with Planned Densities

	Very Low	Low	Medium-Low	Medium-High	High
Metropolitan Cities					
Bellevue	●	●	●	■	●
Seattle	N/A	●	■	●	●
Core Cities					
Auburn	▼	■	▲	N/A	▲
Bothell	■	●	▼	N/A	●
Burien	▲	■	■	■	▲
Federal Way	●	■	▲	N/A	▼
Issaquah	▲	▲	▲	▼	▼
Kent	▲	▼	▼	N/A	▼
Kirkland	●	●	●	▼	●
Redmond	▲	●	●	▲	●
Renton	▲	●	●	■	●
SeaTac	N/A	●	■	N/A	▲
Tukwila	N/A	■	▲	N/A	●
HCT Communities					
Des Moines	●	■	●	N/A	●
Kenmore	▲	●	▲	■	▲
Lake Forest Park	▼	●	●	N/A	■
Mercer Island	■	●	N/A	■	■
Newcastle	N/A	●	N/A	N/A	▼
Shoreline	N/A	●	■	▼	●
Woodinville	■	●	N/A	▼	N/A
Cities & Towns					
Algona	N/A	■	▼	N/A	N/A
Beaux Arts	N/A	▼	N/A	N/A	N/A
Black Diamond	N/A	▼	▼	N/A	N/A
Carnation	N/A	●	N/A	■	▼
Clyde Hill	■	N/A	N/A	N/A	N/A
Covington	N/A	●	N/A	N/A	▲
Duvall	N/A	●	●	N/A	N/A
Enumclaw	N/A	■	■	N/A	▼
Hunts Point	▼	N/A	N/A	N/A	N/A
Maple Valley	N/A	●	N/A	■	N/A
Medina	●	N/A	N/A	N/A	N/A
Milton	N/A	▼	N/A	N/A	N/A
Normandy Park	▲	■	N/A	N/A	▼
North Bend	N/A	▲	●	▼	N/A
Pacific	▼	▲	N/A	N/A	N/A
Sammamish	▲	▲	▲	N/A	N/A
Skykomish	N/A	▼	N/A	N/A	N/A
Snoqualmie	N/A	■	▲	N/A	N/A
Yarrow Point	■	N/A	N/A	N/A	N/A
Urban Unincorporated					
Unincorporated King County	▲	●	▼	▼	■

Symbol Definitions

●	Achieved density is within planned density range
■	Achieved density is within 50% - 100% of category max
▼	Achieved density is less than 50% of category max
▲	Achieved density is higher than the category max
N/A	No development within zones at this density level.

Exhibit 47. Consistency of Achieved Non-Residential Densities with Planned Densities

	Very Low	Low	Medium-Low	Medium-High	High
Metropolitan Cities					
Bellevue	▼	N/A	▼	▼	▼
Seattle	N/A	N/A	N/A	▼	●
Core Cities					
Auburn	N/A	N/A	N/A	N/A	▼
Bothell	N/A	N/A	N/A	▼	▼
Burien	▼	N/A	N/A	▼	▼
Federal Way	▼	N/A	N/A	▼	▼
Issaquah	▼	N/A	N/A	▼	▼
Kent	▼	N/A	N/A	▼	▼
Kirkland	●	▼	■	▲	N/A
Redmond	●	■	N/A	▼	N/A
Renton	▼	N/A	▼	▼	▼
SeaTac	▼	▲	N/A	N/A	N/A
Tukwila	▼	N/A	N/A	N/A	▼
HCT Communities					
Des Moines	N/A	N/A	N/A	▼	▼
Kenmore	N/A	N/A	N/A	▼	N/A
Lake Forest Park	N/A	N/A	N/A	N/A	N/A
Mercer Island	▼	N/A	N/A	N/A	▼
Newcastle	N/A	N/A	N/A	●	▼
Shoreline	▼	N/A	N/A	▼	▼
Woodinville	N/A	N/A	N/A	▼	▼
Cities & Towns					
Algona	N/A	N/A	N/A	N/A	N/A
Beaux Arts	N/A	N/A	N/A	N/A	N/A
Black Diamond	N/A	N/A	N/A	■	N/A
Carnation	N/A	N/A	N/A	▼	N/A
Clyde Hill	N/A	N/A	N/A	N/A	N/A
Covington	N/A	N/A	N/A	N/A	N/A
Duvall	N/A	N/A	N/A	N/A	■
Enumclaw	▼	N/A	▼	▼	▼
Hunts Point	N/A	N/A	N/A	N/A	N/A
Maple Valley	▼	N/A	N/A	▼	▼
Medina	N/A	N/A	N/A	N/A	N/A
Milton	N/A	N/A	N/A	N/A	N/A
Normandy Park	N/A	N/A	N/A	N/A	▼
North Bend	N/A	N/A	▼	▼	N/A
Pacific	N/A	N/A	N/A	▼	N/A
Sammamish	▲	N/A	N/A	N/A	N/A
Skykomish	N/A	N/A	N/A	N/A	▼
Snoqualmie	▼	N/A	N/A	▼	N/A
Yarrow Point	N/A	N/A	N/A	N/A	N/A
Urban Unincorporated					
Unincorporated King County	▼	N/A	N/A	▼	N/A

Symbol Definitions

- Achieved density is within planned density range
- Achieved density is within 50% - 100% of category max
- ▼ Achieved density is less than 50% of category max
- ▲ Achieved density is higher than the category max
- N/A No development within zones at this density level.

Growth Rates and Capacity

Exhibit 48 summarizes the evaluation of consistency between 2006-2018 growth rates and 2035 growth targets as well as capacity and remaining 2035 target growth. These findings are presented for both housing and employment. The symbols indicate where there is and is not a potential inconsistency identified. More detailed presentations of the data that backs up this evaluation can be found in Exhibit 13. Residential Growth Compared to Targets, 2006-2018, Exhibit 31. Housing and Job Capacity by VISION 2050 Regional Geography and Jurisdiction, and Ch. 7 Profiles of Cities and Unincorporated Areas.

Exhibit 48. Consistency of Growth Rates and Capacity with 2035 Targets

	Growth Rate Consistent with 2035 Targets?		Capacity for Achieving 2035 Targets?	
	Residential	Employment	Residential	Employment
Metropolitan Cities				
Bellevue	●	●	●	●
Seattle	●	●	●	●
Core Cities				
Auburn	●	●	●	!
Bothell	●	●	●	●
Burien	●	!	●	!
Federal Way	●	!	●	●
Issaquah	●	●	●	●
Kent	●	●	●	●
Kirkland	●	●	●	●
Redmond	●	●	●	●
Renton	●	●	●	●
SeaTac	!	!	●	!
Tukwila	!	!	●	●
HCT Communities				
Des Moines	!	!	●	!
Kenmore	●	!	●	●
Lake Forest Park	●	●	●	●
Mercer Island	●	●	●	●
Newcastle	●	●	●	●
Shoreline	●	!	●	!
Woodinville	!	!	●	!
Cities & Towns				
Algona	●	●	●	●
Beaux Arts	●	●	!	●
Black Diamond	!	!	●	●
Carnation	●	!	●	●
Clyde Hill	●	●	●	●
Covington	●	●	●	●
Duvall	●	●	●	●
Enumclaw	!	!	!	●
Hunts Point	●	●	●	●
Maple Valley	●	●	●	●
Medina	●	●	●	●
Milton	●	●	●	●
Normandy Park	●	●	●	●
North Bend	●	●	●	●
Pacific	●	!	●	!
Sammamish	●	●	!	●
Skykomish	●	●	●	●
Snoqualmie	●	●	●	●
Yarrow Point	●	●	●	●
Urban Unincorporated				
Unincorporated King County	●	●	●	!

Growth Rate Symbol Definitions

●	Growth was at least 50% of elapsed growth target.
!	Growth was less than 50% of elapsed growth target.

Capacity Symbol Definitions

●	Capacity for growth exceeds remaining 2035 target.
!	Capacity for growth is less than remaining 2035 target.

Jurisdictional Review of Potential Inconsistencies

In May 2021, King County staff shared the criteria for identifying potential inconsistencies and preliminary findings with individual jurisdictions. They also shared guidance for reviewing these inconsistencies and determining whether Reasonable Measures are necessary. This review included consideration for circumstances that may help determine whether there was an actual inconsistency and explain why such an inconsistency occurred. If the jurisdiction determined that Reasonable Measures would not be necessary to overcome an inconsistency, then they were asked to provide documentation and analysis to explain how the inconsistency would be overcome to achieve the planning goal without adopting additional Reasonable Measures.

The guidance for determining whether potential inconsistencies necessitated Reasonable Measures was grounded in the Department of Commerce's Buildable Lands Guidelines. Jurisdictions were encouraged to consider the following kinds of questions to identify issues that could have impacted development outcomes during the evaluation period or provide context for interpreting potential inconsistencies:

- Are the developments permitted during the evaluation period a large enough sample and representative enough of development trends to serve as the basis for reliable findings?
- Have permitting and development trends after the evaluation period shifted in significant ways?
- Do code and development regulations promote unintended consequences that could impact development feasibility?
- Have there been any changes to code or development regulations during or following the evaluation period that address barriers to development consistent with planning objectives?
- Are there other relevant changes in market conditions such as infrastructure investment that could impact future development in the jurisdiction?

After completing this evaluation, jurisdictions provided King County with documentation of their findings regarding the potential inconsistencies, noting where Reasonable Measures are and are not necessary.

For the purpose of summarization in the Urban Growth Capacity Report, county staff and consultants reviewed these jurisdiction responses and categorized them by nine common themes. These themes are described in Exhibit 49. Individual jurisdiction responses to potential inconsistencies are summarized in Exhibit 50 through Exhibit 52. These tables only show cities in which a potential inconsistency was identified, where an observed trend fell short of the planning goal.

Exhibit 49. Theme Categories in Jurisdiction Responses to Potential Inconsistencies

Category Title	Definitions
Development aligned to planning framework	Response cited methodological issues related to translating their planning framework into an FAR-based density approach. The observed development reflects uses, forms, and densities allowed under a jurisdiction's planning framework.
Small development sample	The observed development sample included too few projects to reasonably determine whether development was achieving a planning goal, or included an unusual case causing inconsistency with the planning goal.
Additional development in pipeline	Additional specific projects are underway which represent a shift from trends observed during the evaluation period.
Expected market shift	There are indicators of shifts in market demand which would result in future development trends that do not resemble patterns observed during the evaluation period.
Addition of high capacity transit	High capacity transit such as light rail is coming in and is expected to shift market demand, resulting in future development that does not resemble patterns observed during the evaluation period.
Recent zoning or policy change	New zoning or policies have already been implemented either during or after the evaluation period. These changes are expected to shape future development trends.
Anticipated policy, zoning, or strategy updates	The jurisdiction anticipates adopting and implementing new policies, zoning, or strategies which are expected to shape future development trends.
Fully built out	The jurisdiction has no vacant land available for new development, and marginal redevelopable land maintains the existing growth pattern.
Environmental or utility constraints	Environmental or utility constraints are a barrier to new development.

Exhibit 50. Summary of Jurisdiction Responses - Residential Density Achieved

	Are reasonable measures necessary?	Rationale For Why Reasonable Measures Are or Are Not Required								
		Development aligned to planning approach	Small development sample	Additional development in pipeline	Expected market shifts	Addition of high capacity transit	Recent zoning or policy change	Anticipated policy or strategy updates	Fully built out	Environmental or utility constraints
Core Cities										
Auburn	No			*			*			*
Bothell	No			*			*			*
Burien	No	*								
Federal Way	No	*	*		*	*				
Issaquah	No	*		*			*	*		
Kent	No	*		*	*	*	*	*		
Kirkland	No						*			
Renton	No	*	*	*	*			*		
SeaTac	No	*	*							*
HCT Communities										
Des Moines	No	*			*					
Kenmore	No		*			*				
Lake Forest Park	No	*							*	
Mercer Island	No	*								*
Newcastle	No	*			*	*				
Shoreline	No	*				*				
Woodinville	No	*					*			*
Cities & Towns										
Algona	No	*	*					*		
Beaux Arts	No		*						*	
Black Diamond	No	*	*	*						
Carnation	No	*	*							
Enumclaw	No	*								
Maple Valley	No	*								
Milton	No	*								
Normandy Park	No			*						
North Bend	No			*	*			*		
Skykomish	No		*							
Snoqualmie	No	*								
Yarrow Point	No	*								
Urban Unincorporated										
Unincorporated King County	No	*	*							

Note: This table includes jurisdictions with potential inconsistencies related to achieved residential densities being lower than 50% of the zone category density max. It also includes several cities (Burien, Renton, Des Moines, Kenmore, Mercer Island, Snoqualmie, Yarrow Point) that showed potential inconsistencies using a prior screening approach and provided responses related to the need for Reasonable Measures.

Exhibit 51. Summary of Jurisdiction Responses – Non-Residential Density Achieved

		Rationale For Why Reasonable Measures Are or Are Not Required								
	Are reasonable measures necessary?	Development aligned to planning approach	Small development sample	Additional development in pipeline	Expected market shifts	Addition of high capacity transit	Recent zoning or policy change	Anticipated policy or strategy updates	Fully built out	Environmental or utility constraints
Metropolitan Cities										
Bellevue	No	*	*		*	*				
Seattle	No		*				*			
Core Cities										
Auburn	No	*			*					
Bothell	No	*								
Burien	No		*							
Federal Way	No	*	*			*		*		
Issaquah	No	*		*			*		*	
Kent	No	*				*	*			
Kirkland	No				*					
Redmond	No	*								
Renton	No	*	*		*					
Tukwila	No		*		*					
HCT Communities										
Des Moines	No	*								
Kenmore	No					*				
Mercer Island	No	*								
Newcastle	No	*			*	*				
Shoreline	No	*								
Woodinville	No			*			*			
Cities & Towns										
Carnation	No	*	*							
Enumclaw	No	*	*							
Maple Valley	No	*						*		
Normandy Park	No		*		*			*		
North Bend	No			*				*		
Pacific	No	*								
Skykomish	No		*							
Snoqualmie	No	*	*						*	
Urban Unincorporated										
Unincorporated King County	No	*								

Note: This table excludes jurisdictions in which there were no potential inconsistencies found with regards to achievement of non-residential densities.

Exhibit 52. Summary of Jurisdiction Responses to Potential Inconsistencies – Growth Rate

		Rationale For Why Reasonable Measures Are or Are Not Required								
	Are reasonable measures necessary?	Development aligned to planning approach	Small development sample	Additional development in pipeline	Expected market shifts	Addition of high capacity transit	Recent zoning or policy change	Anticipated policy or strategy updates	Fully built out	Environmental or utility constraints
RESIDENTIAL										
Metropolitan Cities										
Bellevue	No					*	*			
Core Cities										
Burien	No						*	*		
Federal Way	No					*		*		
Kirkland	No			*			*			
SeaTac	No			*	*		*			
Tukwila	Yes				*			*		
HCT Communities										
Des Moines	No			*						
Kenmore	No			*		*				
Shoreline	No			*		*				
Woodinville	No			*	*					
Cities & Towns										
Algona	No	*								
Black Diamond	No	*		*						
Carnation	No	*		*						
Enumclaw	No				*					
EMPLOYMENT										
Metropolitan Cities										
Bellevue	No			*						
Core Cities										
Burien	Yes							*		
Federal Way	No	*	*			*		*		
SeaTac	No		*			*				
Tukwila	Yes									
HCT Communities										
Des Moines	No			*	*	*				
Kenmore	No			*		*				
Mercer Island	No					*	*	*		
Shoreline	No	*					*			
Woodinville	No	*								
Cities & Towns										
Black Diamond	No			*	*					
Carnation	No	*			*					
Duvall	No	*								
Enumclaw	No	*								
Maple Valley	No	*		*						
Pacific	No	*		*	*					

Note: This table excludes jurisdictions in which there were no potential inconsistencies found with regards to growth rate.

Exhibit 53. Summary of Jurisdiction Responses to Potential Inconsistencies – Capacity

	Are reasonable measures necessary?	Rationale For Why Reasonable Measures Are or Are Not Required								
		Development aligned to planning approach	Small development sample	Additional development in pipeline	Expected market shifts	Addition of high capacity transit	Recent zoning or policy change	Anticipated policy or strategy updates	Fully built out	Environmental or utility constraints
RESIDENTIAL										
Cities & Towns										
Enumclaw	No				*			*		
Sammamish	Yes	*								*
EMPLOYMENT										
Core Cities										
Auburn	No		*		*		*			
Burien	Yes							*		
SeaTac	No	*			*			*		
HCT Communities										
Des Moines	No	*								
Shoreline	Yes				*	*	*			
Woodinville	-	*								
Cities & Towns										
Pacific	Yes							*		
Urban Unincorporated										
Unincorporated King County	No	*	*					*		

Note: This table excludes jurisdictions in which there were no potential inconsistencies found with regards to capacity.

Reasonable Measures Recommendations

As a result of the review of potential inconsistencies, the Urban Growth Capacity Report recommends that some jurisdictions adopt Reasonable Measures in the 2024 periodic update to comprehensive plans. Exhibit 54 notes the jurisdictions where Reasonable Measures are recommended, the identified inconsistency that supports the finding, and the general type(s) of Reasonable Measures that will be needed to address the inconsistency.

Exhibit 54. Recommendations for Adoption of Reasonable Measures

Jurisdiction	Inconsistency	Type(s) of Reasonable Measure Recommended
Burien	<ul style="list-style-type: none"> Insufficient employment capacity Employment growth rate inconsistent with target 	<ul style="list-style-type: none"> Action(s) to increase employment capacity Action(s) to encourage and/or incentivize non-residential development
Pacific	<ul style="list-style-type: none"> Insufficient employment capacity 	<ul style="list-style-type: none"> Action(s) to increase employment capacity
Sammamish	<ul style="list-style-type: none"> Insufficient housing capacity 	<ul style="list-style-type: none"> Action(s) to increase residential capacity
Shoreline	<ul style="list-style-type: none"> Insufficient employment capacity 	<ul style="list-style-type: none"> Action(s) to increase employment capacity
Tukwila	<ul style="list-style-type: none"> Housing growth inconsistent with target Employment growth rate inconsistent with target 	<ul style="list-style-type: none"> Action(s) to encourage and/or incentivize residential development Action(s) to encourage and/or incentivize non-residential development

Following the adoption of comprehensive plans in 2024, each jurisdiction will be required to monitor progress toward resolving the inconsistency, with regular reporting to the Growth Management Planning Council.

Ch. 6 Applying Urban Growth Capacity Findings

The findings of this study can be used to inform several kinds of policy and regulatory decisions in local jurisdictions. This chapter provides an overview of two keys applications: growth target setting and local comprehensive plan updates. Additional information will be available in the Urban Growth Capacity Report User's Guide.

Regional Planning and Growth Targets

Growth capacity is one important input that King County uses to inform the allocation of projected countywide housing and employment growth by Regional Geography and jurisdiction. King County is currently in the process of developing new growth targets for the 2019-2044 time period. This process is guided by PSRC's VISION 2050 Regional Growth Strategy which allocates shares of regionally forecasted growth to King County and its Regional Geographies, creating control allocations for each of the urban Regional Geographies. Working in Regional Geography based subgroups, the 39 cities and King County collaborate through the Growth Management Planning Council (GMPC), to determine appropriate growth targets for each jurisdiction. Table DP-1 in the Proposed 2021 Countywide Planning Policies identifies the draft housing and job targets for each jurisdiction, sorted by Regional Geography, as specified in VISION 2050. These growth targets are policy statements of the amount of housing and job growth each jurisdiction is expected to accommodate and plan for in their comprehensive plan. The allocations of growth are consistent with the VISION 2050 Regional Growth Strategy, focusing growth primarily to the two "Metropolitan" cities (Seattle and Bellevue), within "Core" cities with designated Urban Centers, and within "High Capacity Transit" communities. Notably, growth targets for HCT Communities include three unincorporated potential annexation areas (PAAs): Federal Way PAA, North Highline PAA, and Renton PAA.

Exhibit 55 shows draft 2019-2044 growth targets for individual cities and urban unincorporated areas alongside growth capacity for context. In aggregate countywide and each Regional Geography, there is sufficient capacity to accommodate the target growth. However, in some individual jurisdictions the 2044 growth target exceeds available capacity. This is appropriate, as the primary purpose of measuring growth capacity in this report is confirming available capacity to accommodate remaining growth under the current 2035 growth target. Ultimately, jurisdictions will demonstrate zoned or planned capacity for their 2044 growth targets in the next round of comprehensive plan updates in 2024.

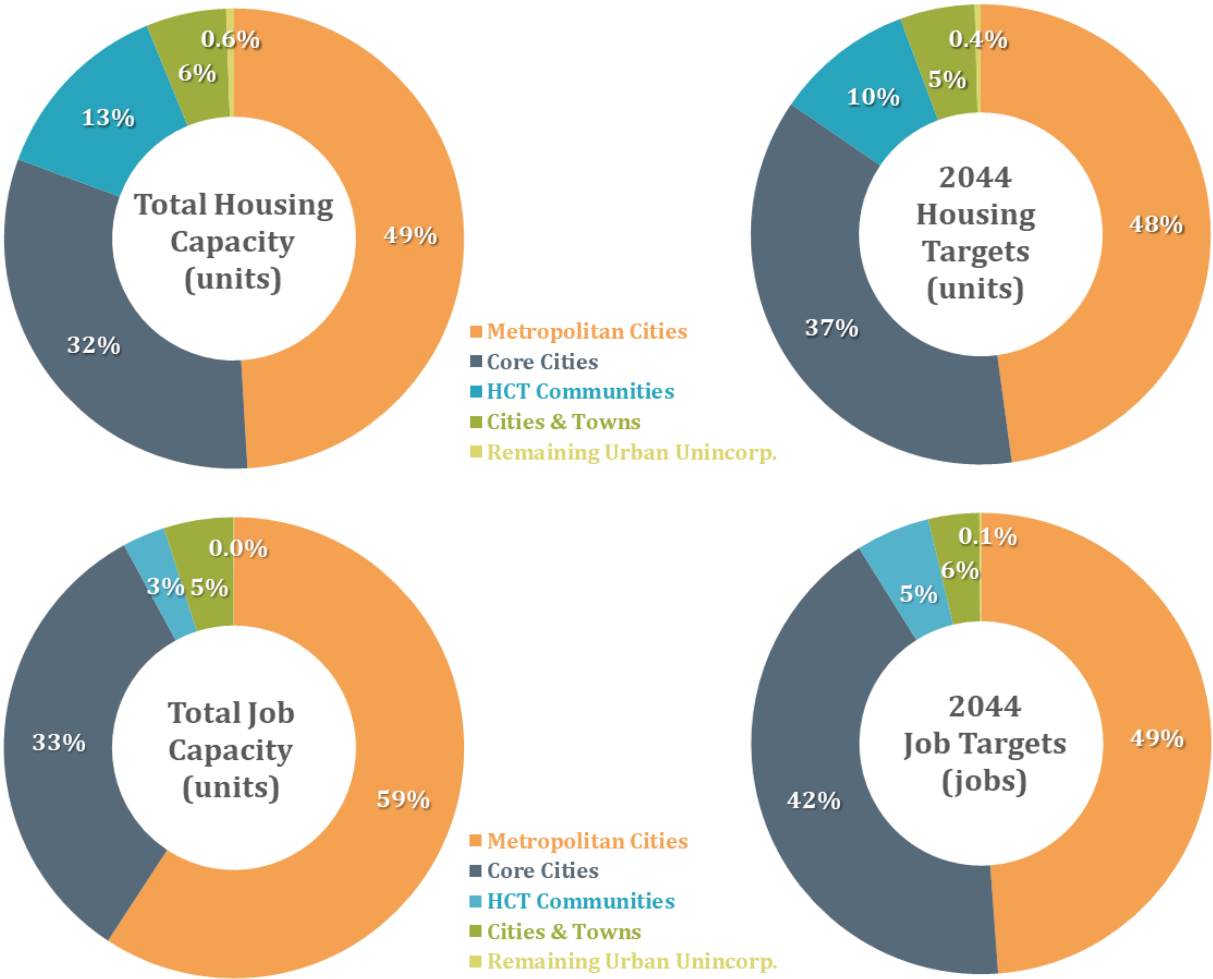
Exhibit 55. DRAFT King County Jurisdiction Growth Targets, 2019-2044

Jurisdiction	Total Housing Capacity (Units)	2044 Housing Target	Share of Housing Target in Regional Geography	Total Job Capacity (Jobs)	2044 Jobs Target	Share of Jobs Target in Regional Geography
Metropolitan Cities						
Bellevue	26,859	35,000	24%	117,241	70,000	29%
Seattle	172,440	112,000	76%	245,598	169,500	71%
Subtotal	199,298	147,000		362,839	239,500	
Core Cities						
Auburn	9,151	12,000	11%	7,927	19,520	9%
Bothell	6,370	5,800	5%	9,335	9,500	5%
Burien	10,816	7,500	7%	752	4,770	2%
Federal Way	14,077	11,260	10%	29,500	20,460	10%
Issaquah	14,103	3,500	3%	15,561	7,950	4%
Kent	11,248	10,200	9%	28,995	32,000	15%
Kirkland	13,352	13,200	12%	18,139	26,490	13%
Redmond	17,777	20,000	18%	15,851	24,000	12%
Renton	16,503	17,000	15%	26,210	31,780	15%
SeaTac	6,396	5,900	5%	15,565	14,810	7%
Tukwila	8,219	6,500	6%	33,749	15,890	8%
Subtotal	128,011	112,860		201,584	207,170	
HCT Communities						
Des Moines	8,386	3,800	13%	2,410	2,380	9%
Federal Way PAA	1,318	1,020	3%	613	720	3%
Kenmore	4,135	3,070	10%	3,881	3,200	13%
Lake Forest Park	1,870	870	3%	691	550	2%
Mercer Island	1,607	1,239	4%	961	1,300	5%
Newcastle	3,234	1,480	5%	680	500	2%
North Highline	1,172	1,420	5%	653	1,220	5%
Renton PAA	2,645	1,680	6%	185	700	3%
Shoreline	25,590	13,330	45%	3,953	10,000	39%
Woodinville	3,705	2,033	7%	4,373	5,000	20%
Subtotal	53,662	29,942		18,400	25,570	
Cities & Towns						
Algona	266	170	1%	313	325	2%
Beaux Arts	2	1	0%	0	0	0%
Black Diamond	8,434	2,900	18%	3,188	680	4%
Carnation	704	799	5%	2,864	450	3%
Clyde Hill	5	10	0%	28	10	0%
Covington	4,609	4,310	27%	8,421	4,496	26%
Duvall	1,343	890	5%	681	990	6%
Enumclaw	1,308	1,057	7%	1,152	989	6%
Hunts Point	5	1	0%	0	0	0%
Maple Valley	2,221	1,720	11%	1,784	1,570	9%
Medina	8	19	0%	0	0	0%
Milton	66	50	0%	1,213	900	5%
Normandy Park	135	153	1%	35	35	0%
North Bend	2,098	1,748	11%	5,759	2,218	13%
Pacific	137	135	1%	77	75	0%
Sammamish	1,144	700	4%	305	305	2%
Skykomish	29	10	0%	0	0	0%
Snoqualmie	372	1,500	9%	4,079	4,425	25%
Yarrow Point	17	10	0%	0	0	0%
Subtotal	22,903	16,183		29,899	17,468	
Remaining Urban Unincorporated (Excluding HCT Communities)						
Subtotal	2,251	1,292		230	700	
Total Urban Capacity:	406,124	307,277	Housing Units	612,952	490,408	Jobs

Many jurisdictions may draw from the Urban Growth Capacity Report to demonstrate sufficient capacity. However, capacity measured in the Urban Growth Capacity is focused on the 2035 planning period and constrained by achieved densities. Therefore, some jurisdictions may use zoned densities or updated future land use assumptions to inform a land capacity analysis in the 2024 comprehensive plans update to demonstrate sufficient capacity for 2044 growth targets. Nonetheless, comparing the Urban Growth Capacity Report capacity to the 2044 growth targets provides some context for the next planning cycle.

Exhibit 56 compares the share of countywide capacity as calculated in the Urban Growth Capacity Report for each VISION 2050 Regional Geography, with the share of growth allocated to Regional Geographies in the 2019-2044 growth targets. As a category, Core Cities have a higher share of countywide housing and employment growth targets than their share of housing and employment capacity. Conversely Metropolitan Cities and HCT Communities both have a greater share of housing capacity than their shares of housing target growth. This implies there is significant spare capacity for additional housing growth in those areas beyond the targets. Likewise, Metropolitan Cities have a significantly greater share of employment capacity than their share of target employment growth.

Exhibit 56. Share of Capacity and Share of Draft 2044 Growth Targets by Regional Geography



County and City Plans

All jurisdictions in King County are required to fully update their comprehensive plans by June 30, 2024. A comprehensive plan is a 20-year vision and roadmap for accommodated growth and development. It guides County or City decisions on where to build new jobs and houses, how to improve transportation systems, and where to make capital investments such as utilities, sidewalks, and libraries. Many cities are also in the process of completing Housing Action Plans which will be implemented in the years to come. These plans and implementing activities will be informed by housing and job growth targets discussed above. But there are many other ways in which the Urban Growth Capacity Report findings can inform these planning activities, as two examples: implementing Reasonable Measures findings from the Urban Growth Capacity Report and housing policy development.

Detailed jurisdiction-level information available in Ch. 7 Profiles of Cities and Unincorporated Areas, as well as resources available in the Urban Growth Capacity Report User's Guide, can be used to focus the development of policies, development regulations, incentives, or other actions for shaping local development activity. The sections that follow provide examples and guidance for applying and building upon Urban Growth Capacity findings.

Implementing Reasonable Measures

Ch. 5 includes a list of jurisdictions where Reasonable Measures were determined to be necessary. Each of these jurisdictions will need to identify actions in their 2024 comprehensive plan updates that are likely to reduce or mitigate the inconsistency between actual growth with planning goals. These actions could include changes to development regulations, new incentives, subarea planning, or reviewing processes to encourage development types that are consistent with local plans. Such changes are also required to be adopted in capital facility plans and development regulations when necessary for full implementation. In some cases, Reasonable Measures must be adopted in Countywide Planning Policies, but no findings from the 2021 Urban Growth Capacity Report indicate this is necessary. Wherever a measure is implemented, it should be clearly identified as a Reasonable Measure that addresses a growth inconsistency identified in the Urban Growth Capacity Report.

The findings of the Urban Growth Capacity Report can help to inform the selection of appropriate Reasonable Measures. Jurisdictions can use this data to answer questions such as:

- In which zones have there been inconsistencies between growth trends and planning goals?
- Where are there infrastructure gaps that create barriers to new development at planned density levels?
- What other barriers may be preventing development that is consistent with local plans?

The King County Urban Growth Capacity Report User's Guide will include a simple framework to help planners to zero in on potential answers to these last two questions, which lie at the heart of Reasonable Measure selection. Additional outreach to the development community, a market study, code audit, or example development feasibility analysis may to help ensure that the measures are both

targeted and effective. For examples of Reasonable Measures see the Department of Commerce [Buildable Land Guidelines](#) Appendix B (2018), [Housing Memo: Issues Affecting Housing Availability and Affordability](#) (2019), and [Guidance for Developing a Housing Action Plan](#) (2020) Chapter 4.

Following implementation, jurisdictions may develop a monitoring program to assess the effectiveness of the Reasonable Measures. This will help in determining when and where additional measures may be needed.

Housing Planning and Policy Development

Housing affordability is an urgent and complex challenge that has impacts throughout King County. This section draws upon the Washington State Department of Commerce [Housing Memo: Issues Affecting Housing Availability and Affordability](#) (2019), to discuss how to apply Urban Growth Capacity findings to support efforts to address housing affordability.

Regional Housing Planning

Housing affordability is a regional challenge, and the most effective responses to this challenge will involve coordination between jurisdictions. An example includes the King County Regional Affordable Housing Task Force which developed a coordinated regional strategy and action plan to address housing needs for lower income households. Regional housing planning can also involve an assessment of countywide housing needs and setting jurisdictional goals for future housing growth by housing type or affordability level.

The Urban Growth Capacity Report is an important resource to support this kind of regional collaboration within King County. By presenting data about housing capacity by density level for jurisdictions in a common format, it allows for the evaluation of aggregate countywide capacity to support different kinds of housing development. This information can be used to determine if there are any capacity limitations when compared to region housing needs. Moreover, Urban Growth Capacity data also allows for the evaluation of how capacity is distributed geographically across the county by jurisdiction. Mapping Urban Growth Capacity data can enable analysis to answer the following kinds of questions:

- Is there capacity for the kinds of new housing development that are called for in countywide housing needs assessments, such as multifamily or “missing middle” formats?¹⁰
- Is capacity located in high demand or amenity-rich locations, like near frequent transit, parks, schools, or employment centers?
- Are areas with housing capacity aligned with high opportunity areas, as defined by PSRC?

¹⁰ The summaries of capacity by density level in the Urban Growth Capacity report provides a good proxy for capacity by housing type, with low density zones typically providing capacity for detached single family development, middle density zones often providing capacity for missing middle formats such as townhomes and multiplexes, and high density zones providing capacity for apartments and condominiums. More detailed analysis of the development code in individual jurisdictions can confirm what kinds of housing are allowed and what code barriers may hinder development in a desired format.

- What kinds of regional amenities or resources are missing in areas with significant capacity for new housing development?

Local Housing Planning

The findings of the Urban Growth Capacity Report can also inform the development of local housing policies and implementing actions during the next round of comprehensive plan updates. Several cities in King County have recently identified housing strategies for implementation through the process of developing Housing Action Plans with funding from Washington State Department of Commerce. The Urban Growth Capacity findings can inform the implementation of these strategies as well. Key policy questions that the Urban Growth Capacity can help answer include:

- Is there capacity for the kinds of new housing development that are called for in local housing needs assessments, such as multifamily or “missing middle” formats?¹¹
- How does housing capacity compare to housing development trends? Are zones with available capacity seeing the kinds of housing development that is needed?
- What kinds of housing development does your plan call for but isn’t being produced?

Similar to the selection of Reasonable Measures, additional outreach to the housing development community, a market study, code audit, or example development feasibility analysis may help to identify and prioritize actions that are most likely to encourage the kinds of new housing development that are in greatest need. Resources for the selection of actions include [Guidance for Developing a Housing Action Plan](#) (2020) Chapter 4 and [Housing Memo: Issues Affecting Housing Availability and Affordability](#) (2019), both available from the Washington State Department of Commerce. Actions could include rezones or revisions to development standards to allow new housing types or density levels, actions to streamline the processing of permit applications, addressing infrastructure limitations (see below), or providing incentives to encourage the development of housing types or affordability levels in greatest need.

Targeting Anti-Displacement Efforts

Displacement is a complex and multifaceted problem that local planners are faced with as they plan for growing the housing supply in their communities. Housing supply shortage is a key driver of housing cost escalation across the county. When housing costs increase, so too does economic displacement pressures on existing residents. The best way to address this issue is increasing the housing supply, with an emphasis on housing formats that are in greatest need.

However, much of the capacity for new housing development is in the form of redevelopment. Many

¹¹ The summaries of capacity by density level in the Urban Growth Capacity report provides a good proxy for capacity by housing type, with low density zones typically providing capacity for detached single family development, middle density zones often providing capacity for missing middle formats such as townhomes and multiplexes, and high density zones providing capacity for apartments and condominiums. More detailed analysis of the development code in individual jurisdictions can confirm what kinds of housing are allowed and what code barriers may hinder development in a desired format.

redevelopable parcels contain older housing stock or commercial space that is typically less expensive to buy or rent than the prevailing market. So, when these older existing buildings are demolished in favor of redevelopment it can result in physical displacement of residents or businesses who cannot afford prevailing market costs in the area.

Parcel-level data developed through the Urban Growth Capacity Report can be of use to support analysis of what kinds of uses are present on redevelopable parcels, including both residential uses as well as nonresidential uses that may include small local businesses or cultural institutions. This information, combined with outreach to residents, community groups, businesses, or other stakeholders, can be essential to developing targeted strategies or partnerships to address physical displacement risks. A good resource for such efforts includes the Washington State Department of Commerce [Guidance for Developing a Housing Action Plan](#) (2020) Chapter 5: Strategies for Minimizing and Mitigating Displacement.

Addressing Infrastructure Gaps

As described in Appendix G: Approach for Identifying Infrastructure Gaps, each jurisdiction conducted an assessment to identify significant infrastructure gaps or capacity issues that present barriers to realizing development capacity. This information can support both local and regional capital facilities planning to provide timely infrastructure to facilitate housing development in locations and formats that are most needed to address housing affordability challenges.

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 VISION 2050 Regional Geography, as shown in Exhibit 57.

Exhibit 57. Profiled King County Jurisdictions by VISION 2050 Regional Geography

Metropolitan Cities	<ul style="list-style-type: none"> ▪ City of Bellevue 	<ul style="list-style-type: none"> ▪ City of Seattle 	
Core Cities	<ul style="list-style-type: none"> ▪ City of Auburn ▪ City of Bothell ▪ City of Burien ▪ City of Federal Way 	<ul style="list-style-type: none"> ▪ City of Issaquah ▪ City of Kent ▪ City of Kirkland ▪ City of Redmond 	<ul style="list-style-type: none"> ▪ City of Renton ▪ City of SeaTac ▪ City of Tukwila ▪
High Capacity Transit Communities	<ul style="list-style-type: none"> ▪ City of Des Moines ▪ City of Kenmore ▪ City of Lake Forest Park 	<ul style="list-style-type: none"> ▪ City of Mercer Island ▪ City of Newcastle ▪ 	<ul style="list-style-type: none"> ▪ City of Shoreline ▪ City of Woodinville
Cities and Towns	<ul style="list-style-type: none"> ▪ City of Algona ▪ City of Beaux Arts ▪ City of Black Diamond ▪ City of Carnation ▪ City of Clyde Hill ▪ City of Covington ▪ City of Duvall 	<ul style="list-style-type: none"> ▪ City of Enumclaw ▪ Town of Hunts Point ▪ City of Maple Valley ▪ City of Medina ▪ City of Milton ▪ City of Normandy Park 	<ul style="list-style-type: none"> ▪ City of North Bend ▪ City of Pacific ▪ City of Sammamish ▪ Town of Skykomish ▪ City of Snoqualmie ▪ Town of Yarrow Point
Urban Unincorporated Areas	<ul style="list-style-type: none"> ▪ All urban unincorporated areas combined, including those that are classified as HCT Communities in VISION 2050. 		

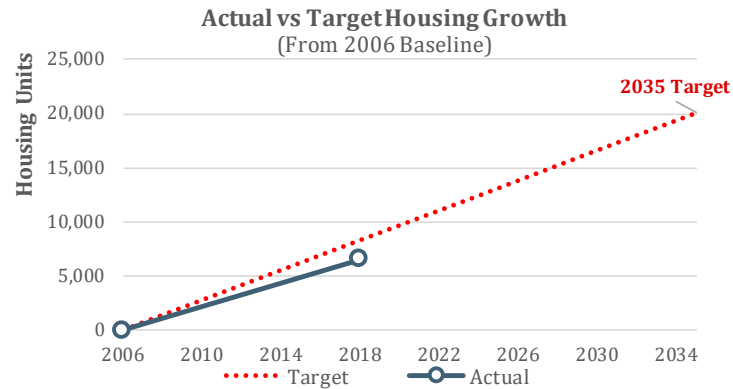
Metropolitan Cities

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

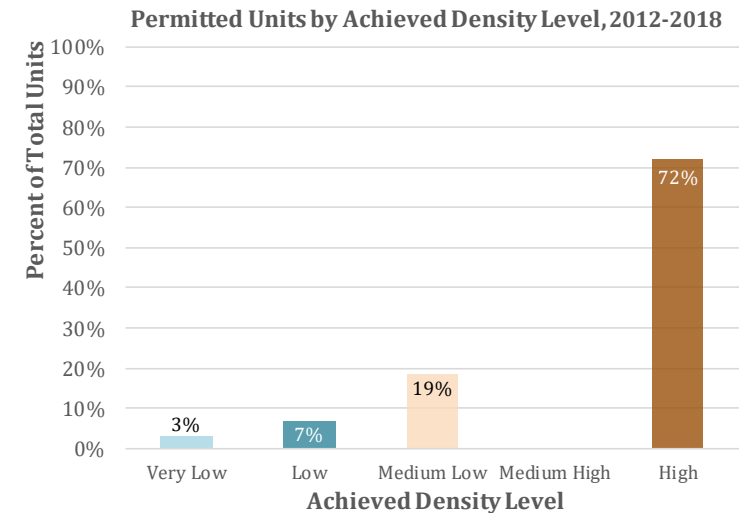
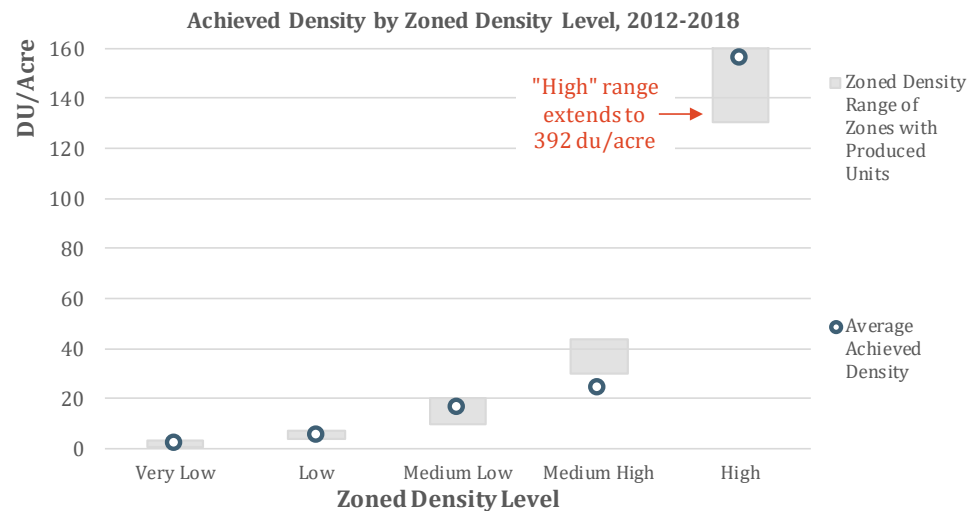
% of Pace Needed to Achieve 2035 Housing Growth Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Needed to Meet 2035 Target
79.4%	0.95%	1.17%

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 1.2% 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	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



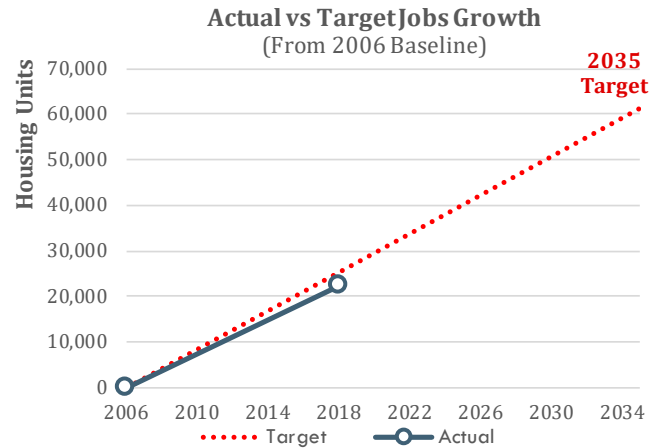
Bellevue - Residential Land Supply and Capacity

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	4.1 / 6.6	573
Medium Low Density	Land Supply	0.00	0.00	0.00	0.00	0.0% - 10.0%	338.40	10.0 / 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 / 44.8	1,291
High Density	Land Supply	0.00	0.00	0.00	0.00	0.0% - 10.0%	318.06	53.9 / 303.0	19,529
All Zones	Total	0.00	0.00	0.00	0.00		1,190.28		23,375

Capacity (units)		Housing Capacity by Density Level (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		

Note: Bellevue zone density is largely based on FAR. For these zones, a dwelling/unit per acre equivalent was calculated to categorize zone density level. Additionally, the development density/intensity of parcels with critical areas and their buffers as identified in Bellevue's Land Use Code section [20.25H.035](#) was calculated using Bellevue's development density/intensity formula specified in [LUC 20.25H.45](#). This net acreage was carried forward when determining net vacant and redevelopable land.

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

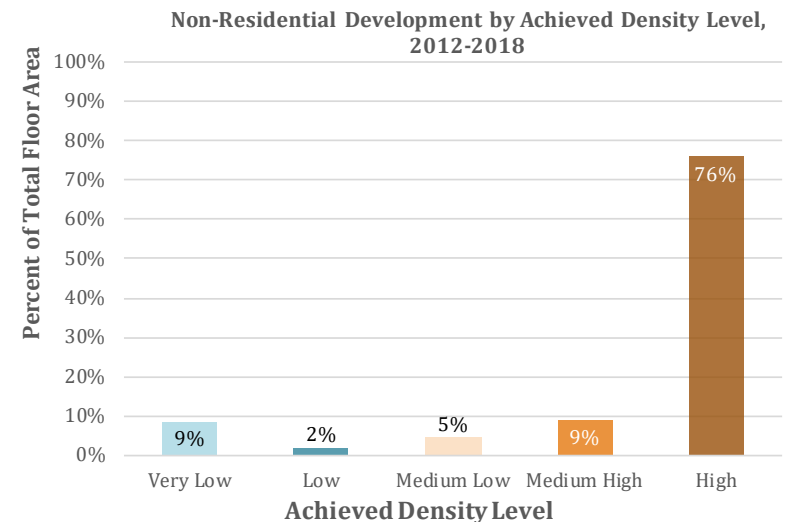
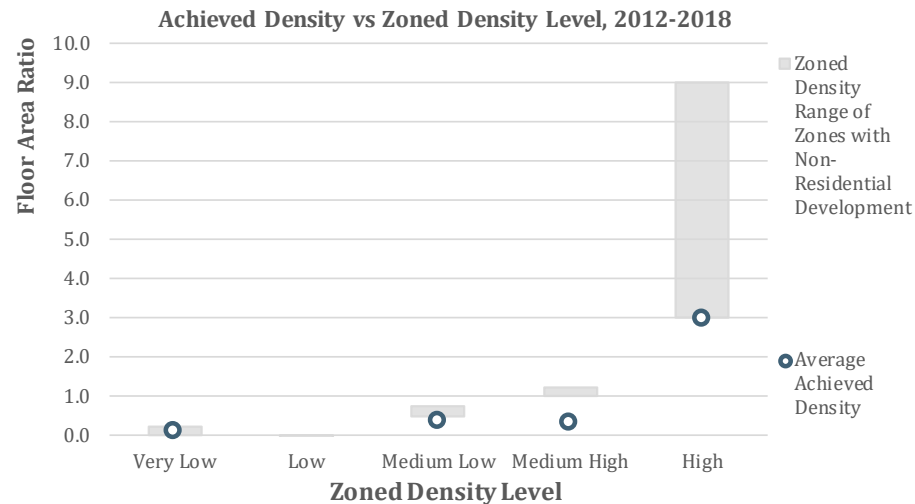
% of Pace Needed to Achieve 2035 Jobs Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Rate Needed to Meet 2035 Target
88.6%	1.44%	1.43%

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 1.4% 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	1,661,282	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

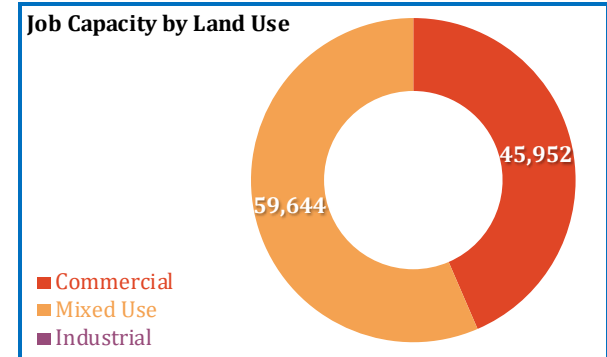


Bellevue - Commercial/Industrial Land Supply and Job Capacity

Land Supply	Gross Area (acres)	Critical Areas (acres)	ROWs (acres)	Public Purpose (acres)	Initial Land Supply	Market Factor	Buildable Area (acres)
Vacant / Redev.							
Commercial	447	0.0	0.0	0.0	447	0% - 15%	402.6
Mixed Use	382	0.0	0.0	0.0	382	8% - 10%	71.3
Industrial	29	0.0	0.0	0.0	29	10%	25.8
Non-Res Land Total	858	0.0	0.0	0.0	858		499.7

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						
Commercial Total	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
<i>Job Capacity in Pipeline</i>						11,645
City Total	26.43	9.90	1.86	32.42	550	117,241

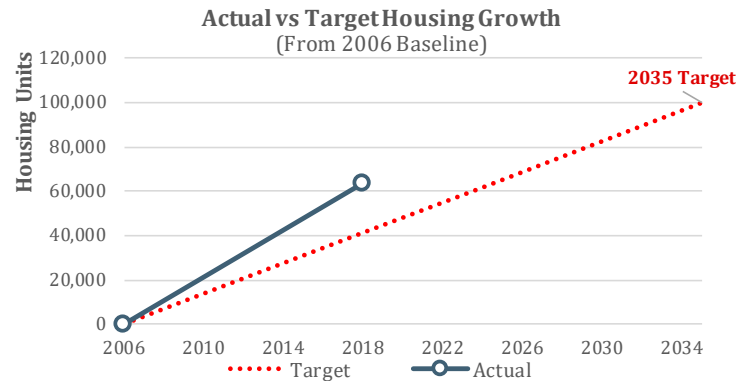
Job Capacity by Assumed Density Level	#	%
Very Low Density	1,699	2%
Low Density	1,694	2%
Medium Low Density	5,056	5%
Medium High Density	17,663	17%
High Density	79,485	75%
<i>Capacity in Pipeline</i>		11,645
Total Capacity (jobs)		117,241
Remaining Target (2018-2035)		38,951
Surplus/Deficit Capacity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



Note: The development density/intensity of parcels with critical areas and their buffers as identified in Bellevue's Land Use Code section [20.25H.035](#) was calculated using Bellevue's development density/intensity formula specified in [LUC 20.25H.45](#). This net acreage was carried forward when determining net vacant and redevelopable land.

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	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Needed to Meet 2035
154.3%	1.65%	0.57%

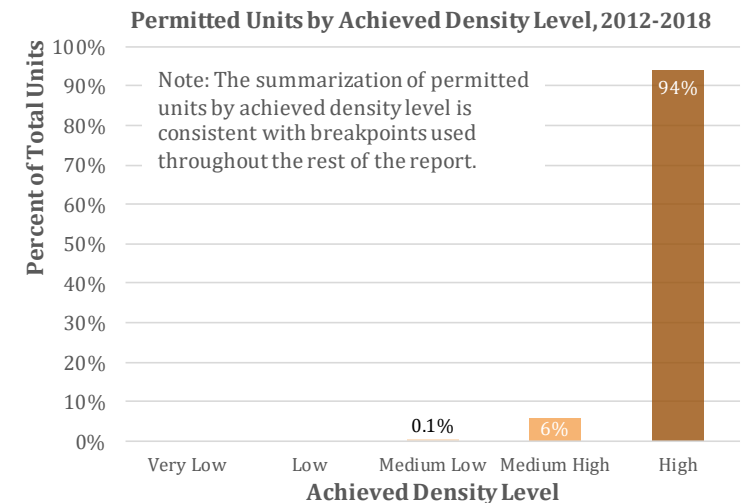
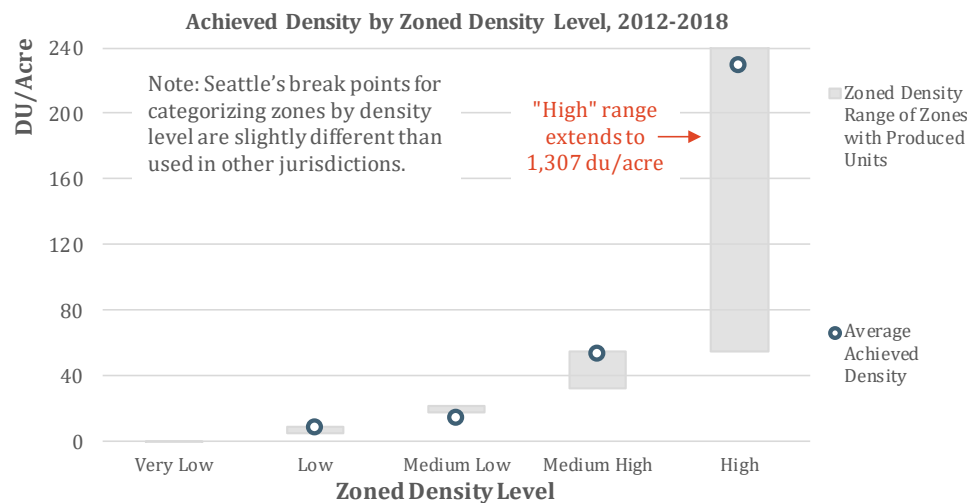
Since 2006, Seattle has grown at 154% of the pace needed to achieve its 2035 housing growth target of 99,760 units. During this period, the total number of housing units in Seattle grew by roughly 22%. At this current rate, Seattle is over the production pace needed to meet its 2035 growth target, and 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							
Low 4 - 10 du/acre							7.8
Medium Low 10 - 24 du/acre							14.2
Medium High 24 - 54 du/acre							52.4
High 54 & up du/acre							229.2
Total					305.7	45,365	148.4

Achieved Density Calculations Provided
By the City of Seattle

Achieved Density Level (du/acre)	Net Area (acres)	Total Units
Very Low 0 - 4 du/acre	1.9	0
Low 4 - 10 du/acre	0.0	0
Medium Low 10 - 24 du/acre	1.6	23
Medium High 24 - 48 du/acre	68.5	2,707
High 48 & up du/acre	233.7	42,635
Total	305.7	45,365

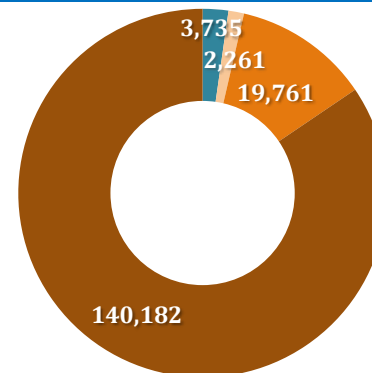
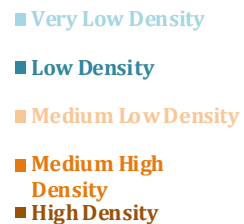


Seattle - Residential Land Supply and Capacity

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	0.0	0.0				0
Low Density	Vacant Subtotal	0.0	Not available for disaggregation	0.0	0%	0.0	0%	0
	Redev Subtotal	1,283.9		1,052.3	100%	0.5	0% - 35%	3,735
	Subtotal	1,283.9	231.6	1,052.3				3,735
Medium Low Density	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% - 38%	2,261
	Subtotal	262.3	10.8	251.5				2,261
Medium High Density	Vacant Subtotal	0.0*	Not available for disaggregation	0.0*	0%	0.0	0%	0
	Redev Subtotal	685.3		658.0	100%	1.3 / 1.8	10% - 38%	19,761
	Subtotal	685.3	27.3	658.0				19,761
High Density	Vacant Subtotal	41.0	Not available for disaggregation	36.4	0% - 100%	0.4 / 22.0	10% - 40%	4,813
	Redev Subtotal	964.8		938.1	20% - 100%	1.9 / 30.0	5% - 40%	135,369
	Subtotal	1,005.7	31.2	974.5				140,182
All Zones	Vacant Total	41.0		36.4				4,813
	Redev Total	3,196.2		2,899.9				161,127
	Total	3,237.2		2,936.3				165,940

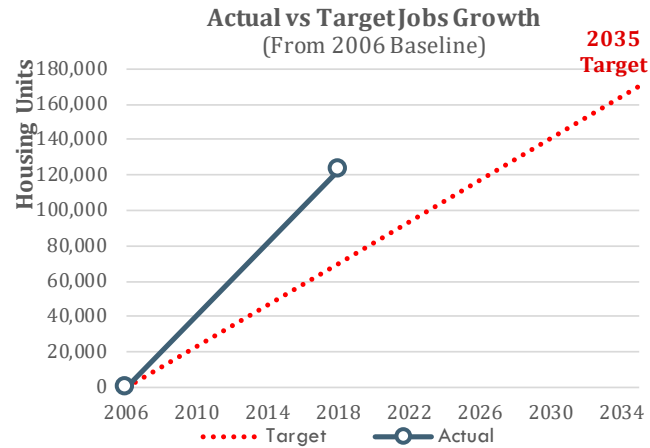
Capacity (units)	
Very Low Density Zones	0
Low Density Zones	3,735
Medium Low Density Zones	2,261
Medium High Density Zones	19,761
High Density Zones	140,182
Citywide ADU Capacity	6,500
Total Capacity (Units)	172,440
Remaining Target (2018-2035)	36,085
Surplus/Deficit Capacity (Units)	136,355

Housing Capacity by Density Level (units)



*In the Medium-Low and Medium-High density levels, the capacity showing up as vacant but with zero buildable area is a vestige of Seattle's split zoning,

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	

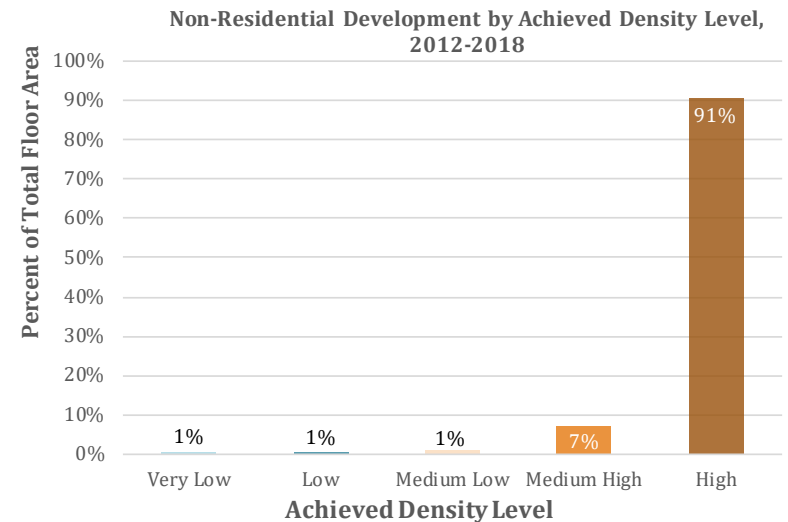
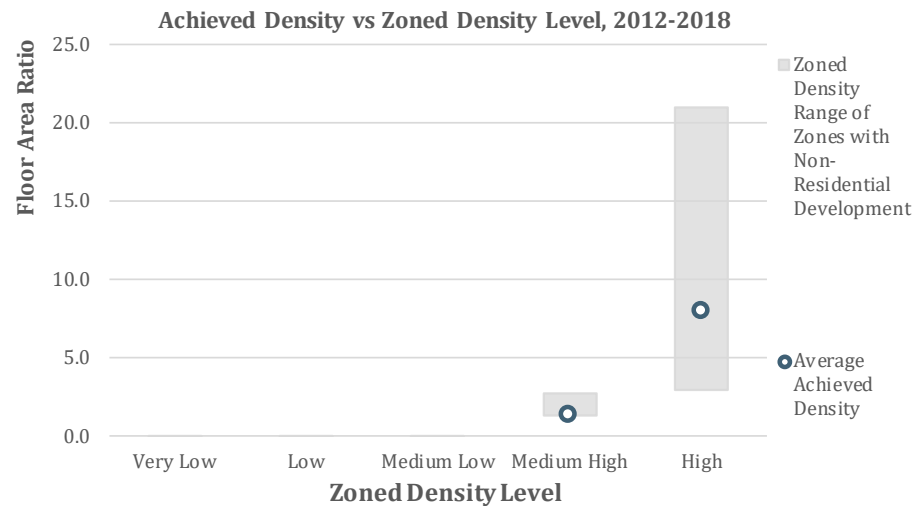
% of Pace Needed to Achieve 2035 Jobs Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Rate Needed to Meet 2035 Target
174.9%	1.86%	0.43%

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	Achieved Density Calculations Provided By the City of Seattle		
Low 0.35 - 0.5 FAR			
Medium Low 0.5 - 1.0 FAR			
Medium High 1.0 - 3.0 FAR			1.3
High 3.0 & up FAR			8.0
Total	3,272,305	16,401,456	5.0

Achieved Density Level	Net Area (sq. feet)	Total Floor Area (sq. feet)	Average Achieved Density (FAR)
Very Low	397,813	109,271	0.3
Low	269,387	121,607	0.5
Medium Low	227,891	168,617	0.7
Medium High	588,131	1,142,705	1.9
High	1,789,082	14,859,256	8.3
Total	3,272,305	16,401,456	5.0

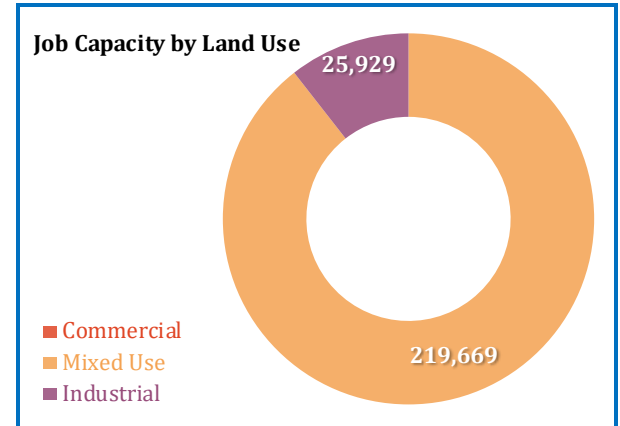


Seattle - Commercial/Industrial Land Supply and Job Capacity

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	306.0	0.0	0.0	0.0	306.0	0% - 40%	231.6
Industrial	417.9	0.0	0.0	0.0	417.9	0% - 25%	380.6
Non-Res Land Total	723.9	0.0	0.0	0.0	723.9		612.1

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	0.00	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	0.75	2.40 / 22.00	0.00	4.13	275 / 300	7,922
Redevelopable	18.32	0.50 / 30.00	21.71	69.42	0 / 300	211,747
Mixed Use Total	19.06	0.50 / 30.00	21.71	73.55	0 / 300	219,669
Industrial						
Vacant	19.74	0.40 / 2.75	5.12	20.03	500 / 700	25,929
Redevelopable	0.00	0.00	0.00	0.00	0	0
Industrial Total	19.74	0.40 / 2.75	5.12	20.03	500 / 700	25,929
City Total						
Commercial	0.00	0.00	0.69	0.00	0	0
Mixed Use	19.06	0.50 / 30.00	0.91	73.55	0 / 300	219,669
Industrial	19.74	0.40 / 2.75	0.26	20.03	500 / 700	25,929
<i>Job Capacity in Pipeline</i>						<i>0</i>
City Total	38.80	30.00	1.86	93.58	0 / 700	245,598

Job Capacity by Assumed Density Level	#	%
Very Low Density	0	0%
Low Density	0	0%
Medium Low Density	4,536	2%
Medium High Density	29,352	12%
High Density	211,076	86%
<i>Uncategorized Jobs - No Density Level</i>		633
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

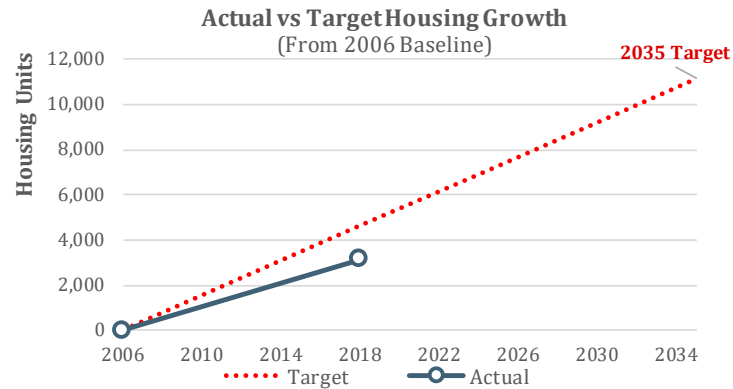
City of Renton

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	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Needed to Meet 2035 Target
68.0%	1.05%	1.56%

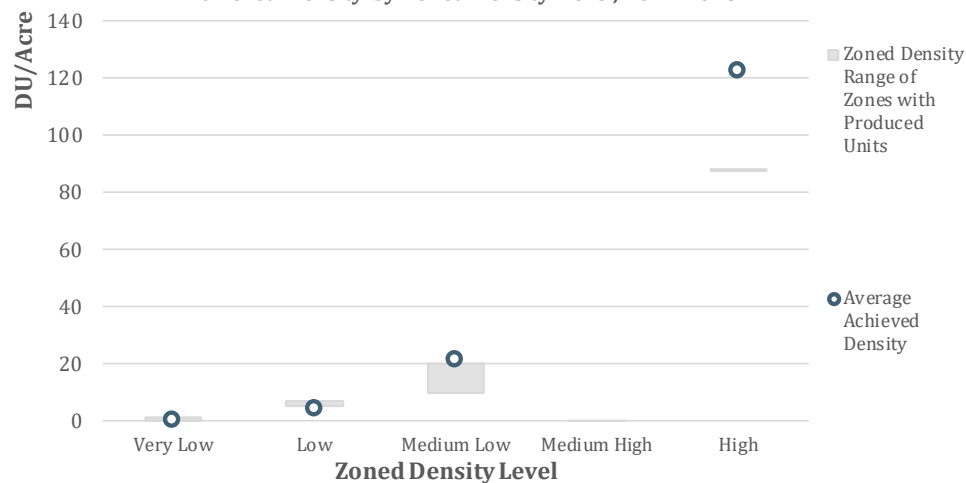
Since 2006, Auburn has grown at 68% of the pace needed to achieve its 2035 housing growth target of 11,159 units. During this period, the total number of housing units in Auburn grew by roughly 13%. At this current rate, Auburn is under the production pace needed to meet its 2035 growth target, and needs to grow at an annual rate of 1.6% to reach its remaining target by 2035.

Residential Achieved Densities

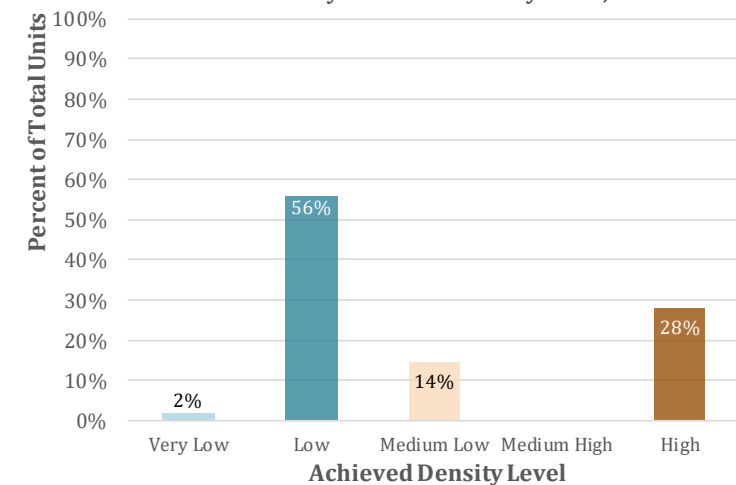
Zoned Density (du/acre)	Gross Area (acres)	Critical Areas (acres)	Public Purpose (acres)	ROWs (acres)	Net Area (acres)	Total Units	Achieved Density (DU/acre)
Very Low	0 - 4 du/acre	173.6	0.0	0.0	0.0	173.6	5
Low	4 - 10 du/acre	135.5	0.0	0.0	0.0	135.5	525
Medium Low	10 - 24 du/acre	6.2	0.0	0.0	0.0	6.2	132
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
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

Achieved Density by Zoned Density Level, 2012-2018

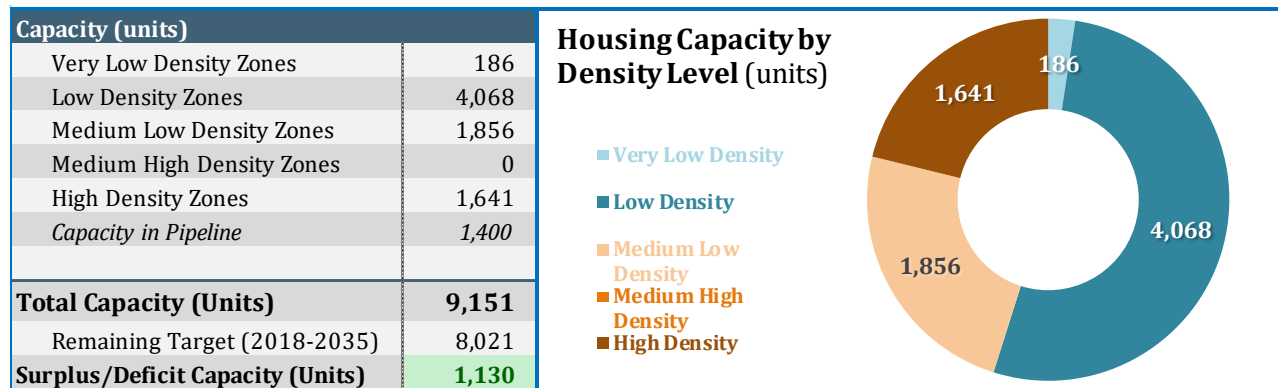


Permitted Units by Achieved Density Level, 2012-2018

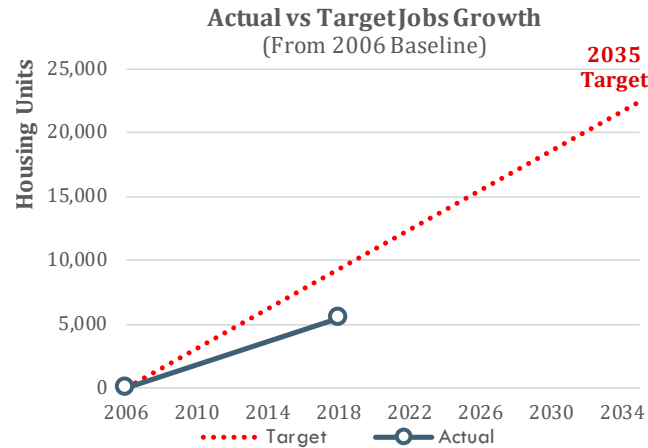


Auburn - Residential Land Supply and Capacity

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



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

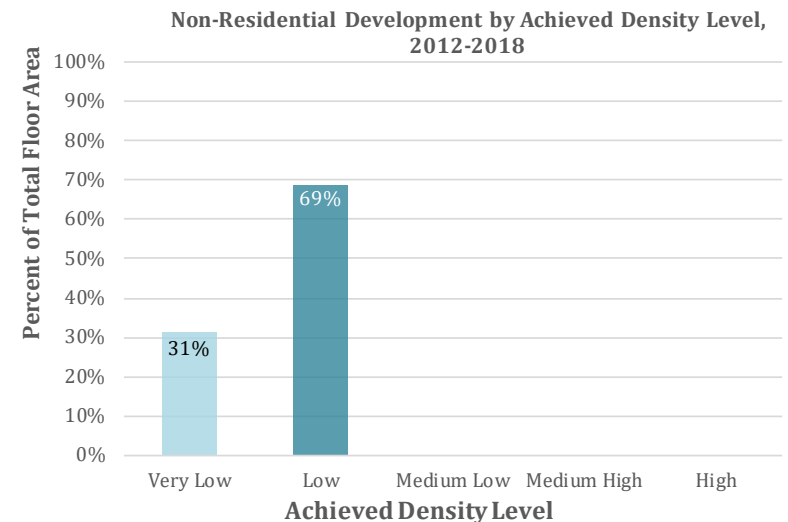
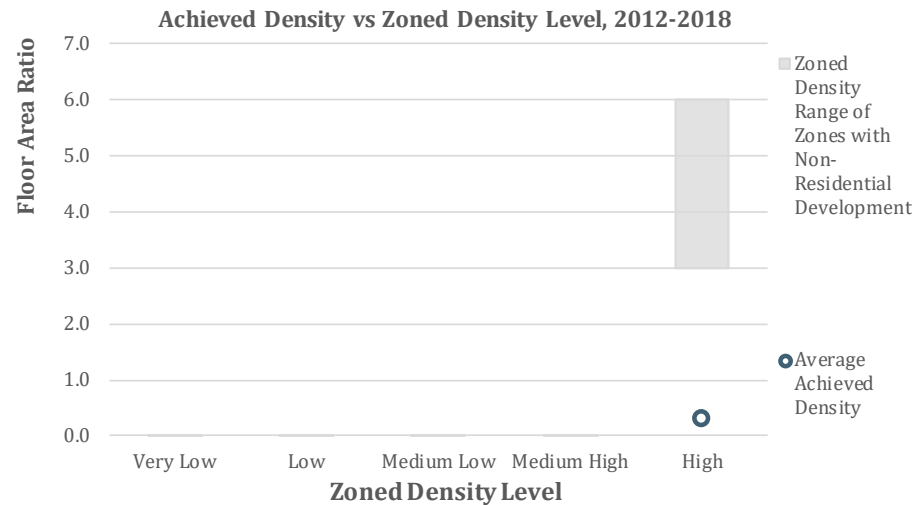
% of Pace Needed to Achieve 2035 Jobs Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Rate Needed to Meet 2035 Target
59.4%	1.13%	1.94%

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 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	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



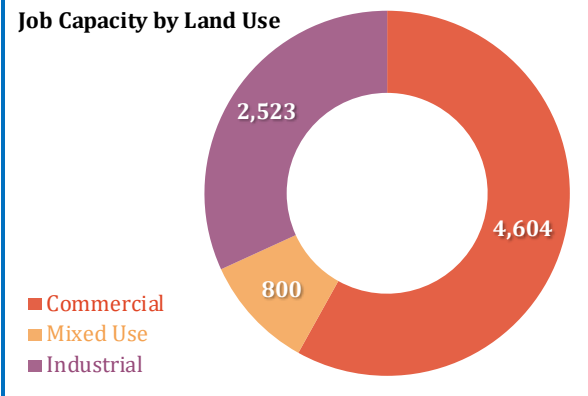
Auburn - Commercial/Industrial Land Supply and Job Capacity

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	1,334
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
<i>Job Capacity in Pipeline</i>						0
City Total	24.05	0.07 / 0.41	1.86	4.79	375 / 1000	7,927

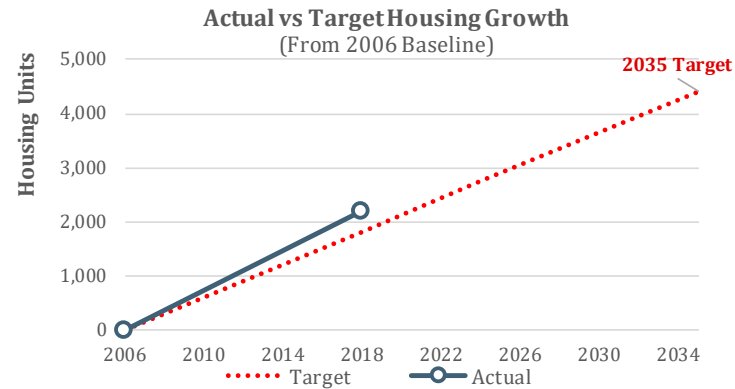
Job Capacity by Assumed Density Level	#	%
Very Low Density	4,877	62%
Low Density	3,050	38%
Medium Low Density	0	0%
Medium High Density	0	0%
High Density	0	0%
<i>Capacity in Pipeline</i>		0
Total Capacity (jobs)		7,927
Remaining Target (2018-2035)		16,928
Surplus/Deficit Capacity (jobs)		-9,001

Job Capacity by Land Use



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	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Needed to Meet 2035 Target
120.5%	1.75%	1.02%

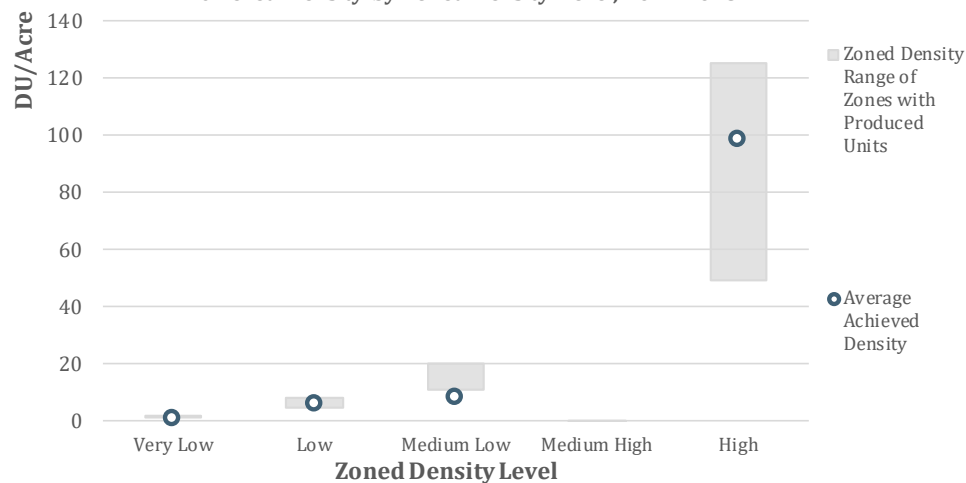
Since 2006, Bothell has grown at 121% of the pace needed to achieve its 2035 housing growth target of 4,420 units. During this period, the total number of housing units in Bothell grew by roughly 23%. At this current rate, Bothell is over the production pace needed to meet its 2035 growth target, and needs to grow at an annual rate of 1% to reach its remaining target by 2035.

Residential Achieved Densities

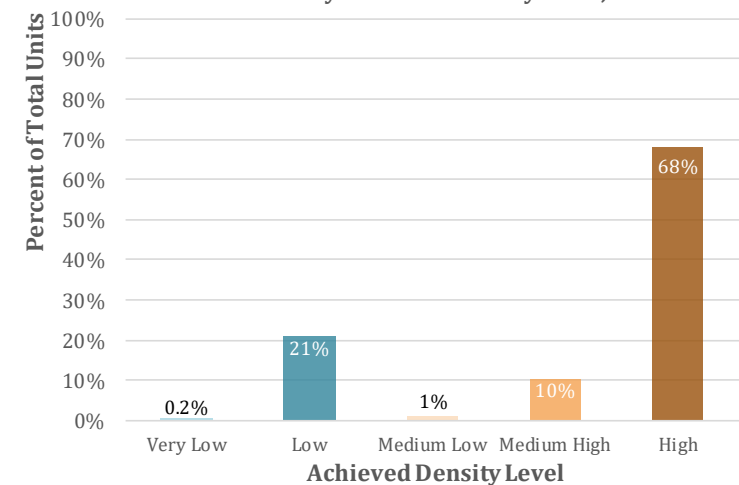
Zoned Density (du/acre)	Gross Area (acres)	Critical Areas (acres)	Public Purpose (acres)	ROWs (acres)	Net Area (acres)	Total Units	Achieved Density (DU/acre)
Very Low	0 - 4 du/acre	1.6	0.0	0.0	1.6	1	0.6
Low	4 - 10 du/acre	179.1	43.2	0.0	116.2	670	5.8
Medium Low	10 - 24 du/acre	6.3	0.2	0.0	6.1	49	8.1
Medium High	24 - 48 du/acre	0.0	0.0	0.0	0.0	0	
High	48 & up du/acre	20.9	0.0	1.7	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

Achieved Density by Zoned Density Level, 2012-2018

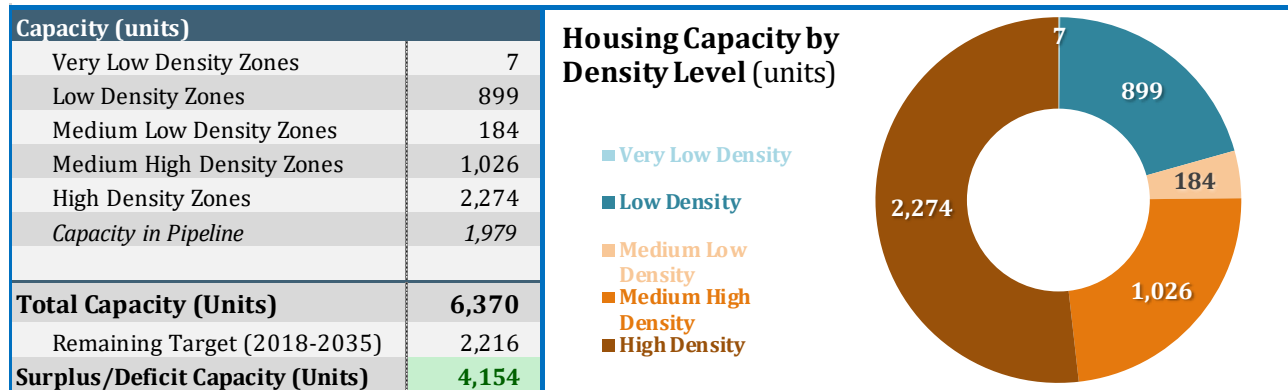


Permitted Units by Achieved Density Level, 2012-2018

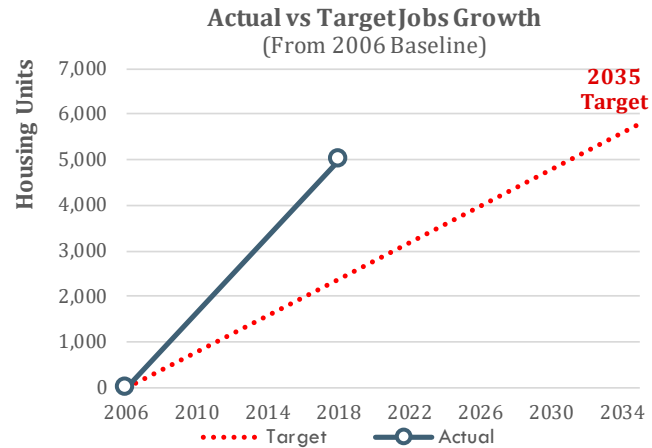


Bothell - Residential Land Supply and Capacity

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



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

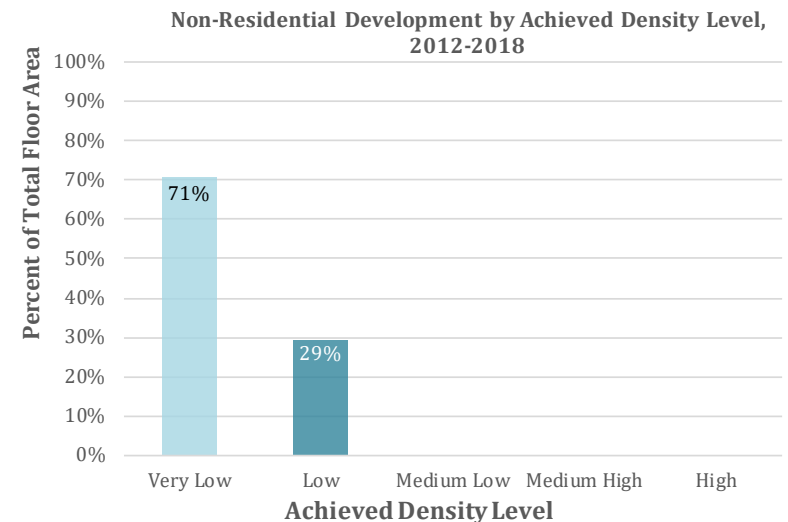
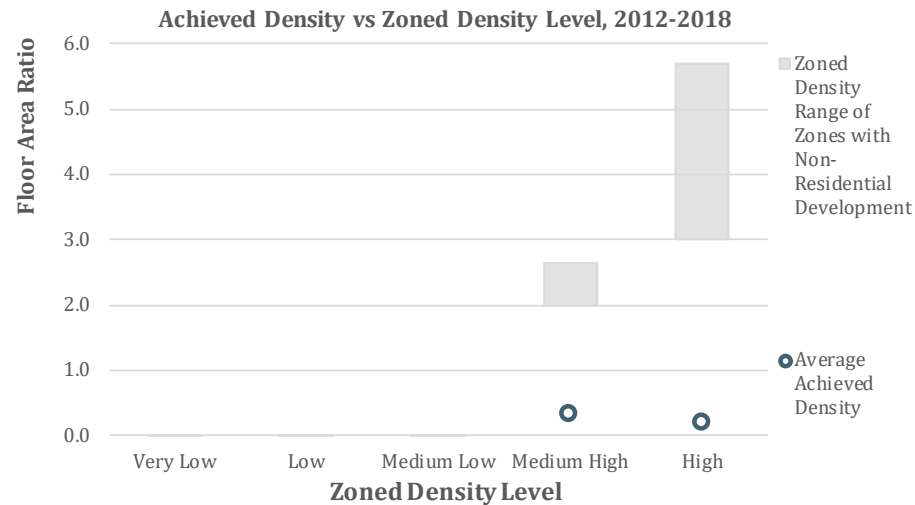
% of Pace Needed to Achieve 2035 Jobs Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Rate Needed to Meet 2035 Target
209.3%	3.01%	0.27%

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



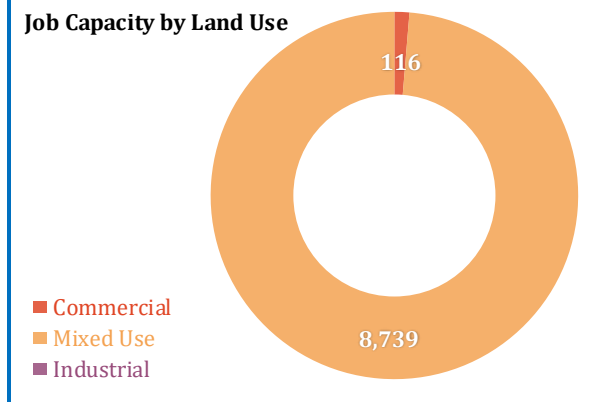
Bothell - Commercial/Industrial Land Supply and Job Capacity

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	4,602
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
<i>Job Capacity in Pipeline</i>						<i>480</i>
City Total	3.24	1.20	1.86	1.77	0 / 1000	9,335

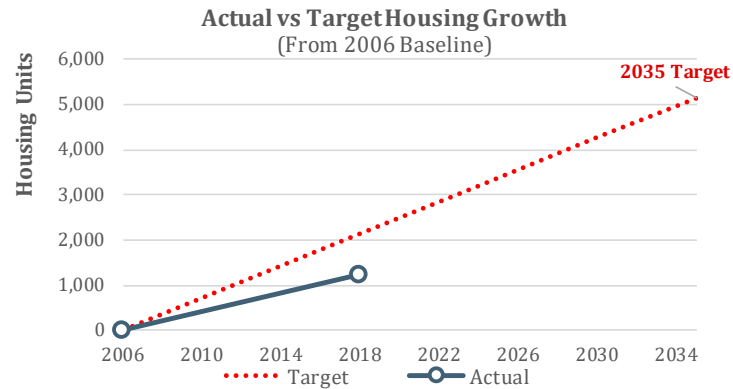
Job Capacity by Assumed Density Level	#	%
Very Low Density	225	3%
Low Density	2,605	29%
Medium Low Density	540	6%
Medium High Density	5,485	62%
High Density	0	0%
<i>Capacity in Pipeline</i>		<i>480</i>
Total Capacity (jobs)		9,335
Remaining Target (2018-2035)		777
Surplus/Deficit Capacity (jobs)		8,558

Job Capacity by Land Use



City of Burien

Housing Growth and Residential Development Trends



Burien Housing Growth Target: 2006-2035	
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	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Needed to Meet 2035 Target
57.5%	0.51%	1.02%

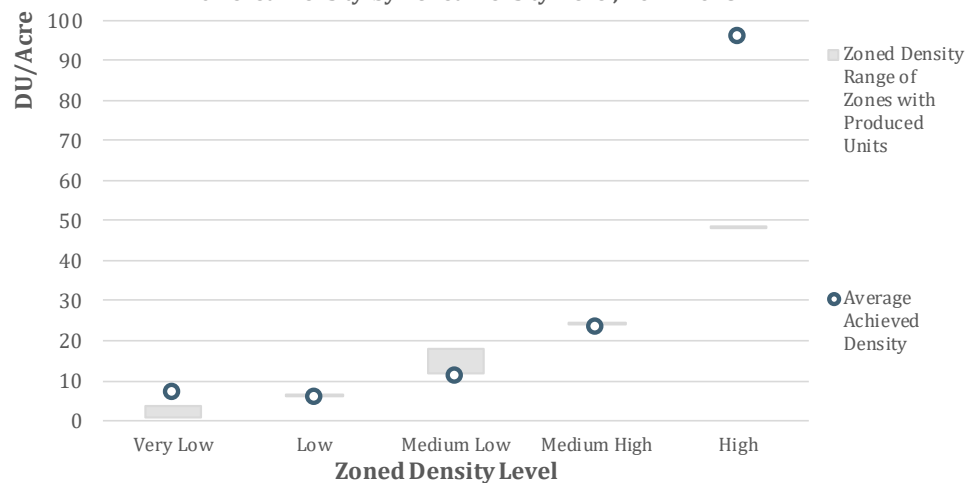
Since 2006, Burien has grown at 57% of the pace needed to achieve its 2035 housing growth target of 5,150 units. During this period, the total number of housing units in Burien grew by roughly 6%. At this current rate, Burien is under the production pace needed to meet its 2035 growth target, and needs to grow at an annual rate of 1% to reach its remaining target by 2035.

Residential Achieved Densities

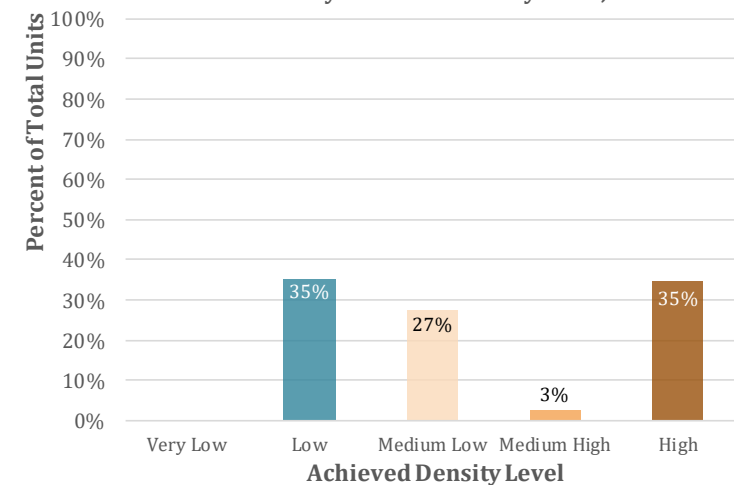
Zoned Density (du/acre)		Gross Area (acres)	Critical Areas (acres)	Public Purpose (acres)	ROWs (acres)	Net Area (acres)	Total Units	Achieved Density (DU/acre)
Very Low	0 - 4 du/acre	17.6	12.5	0.0	0.2	4.8	33	6.9
Low	4 - 10 du/acre	58.3	0.0	0.5	2.1	55.6	323	5.8
Medium Low	10 - 24 du/acre	5.7	0.0	0.0	0.0	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

Achieved Density by Zoned Density Level, 2012-2018

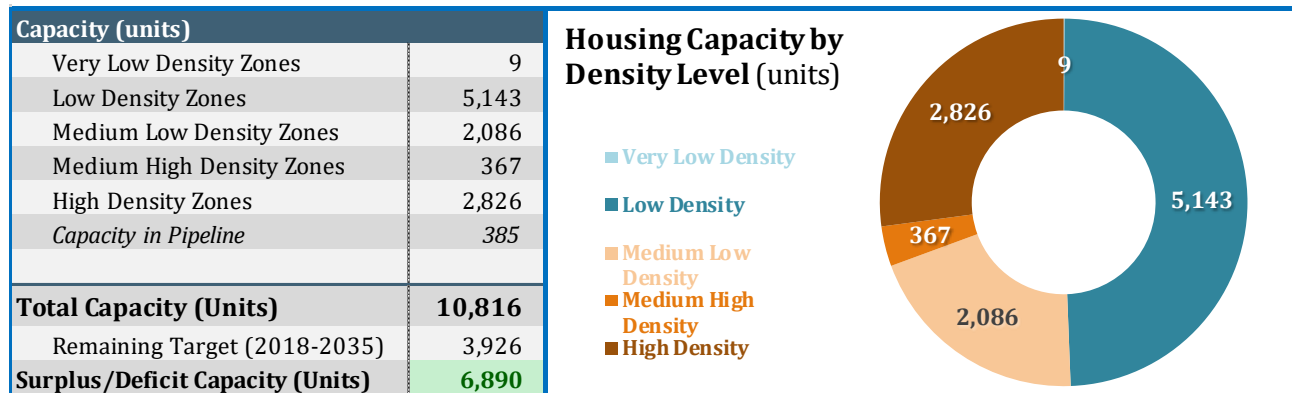


Permitted Units by Achieved Density Level, 2012-2018

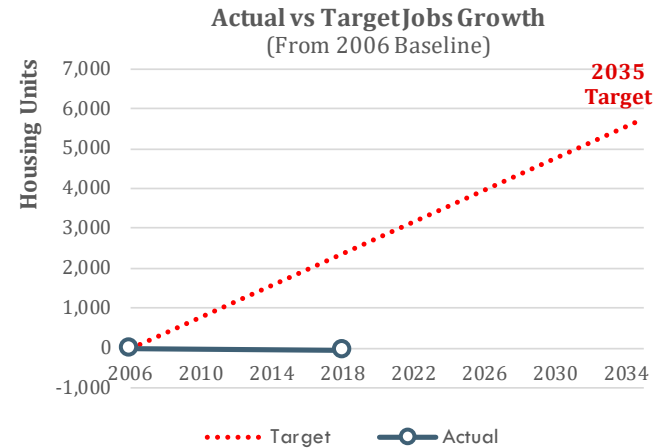


Burien - Residential Land Supply and Capacity

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



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	5,754

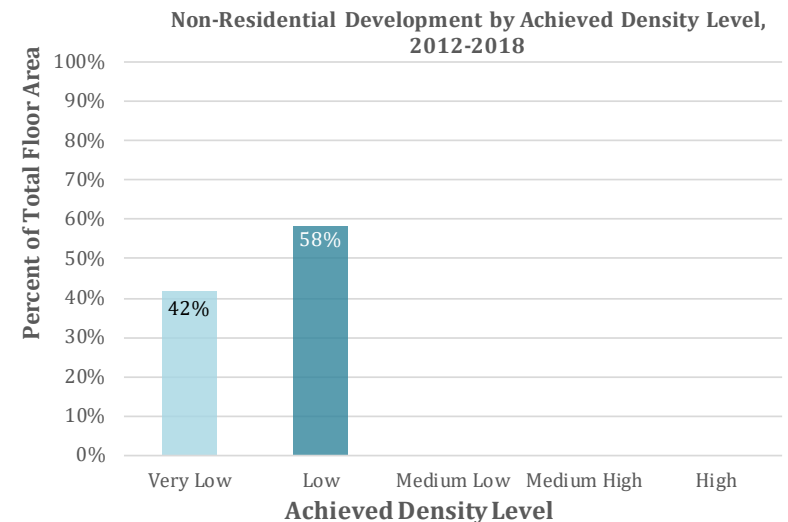
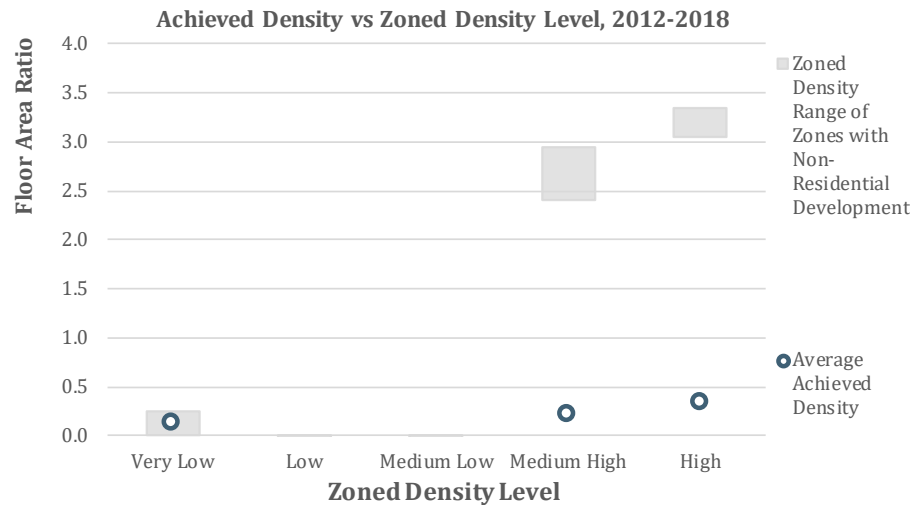
% of Pace Needed to Achieve 2035 Jobs Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Rate Needed to Meet 2035 Target
-1.1%	-0.02%	2.14%

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 2.1% 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	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



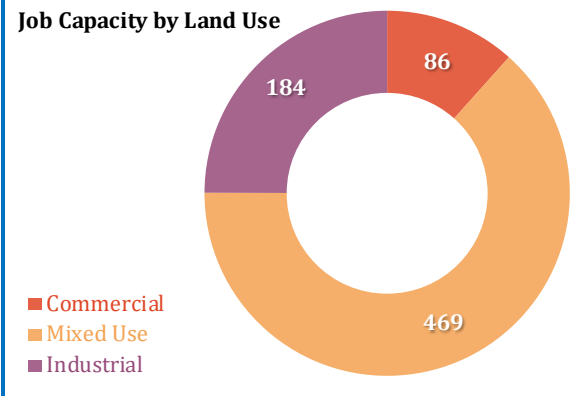
Burien - Commercial/Industrial Land Supply and Job Capacity

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
<i>Job Capacity in Pipeline</i>						13
City Total	3.71	0.12 / 0.41	1.86	0.62	650 / 1200	752

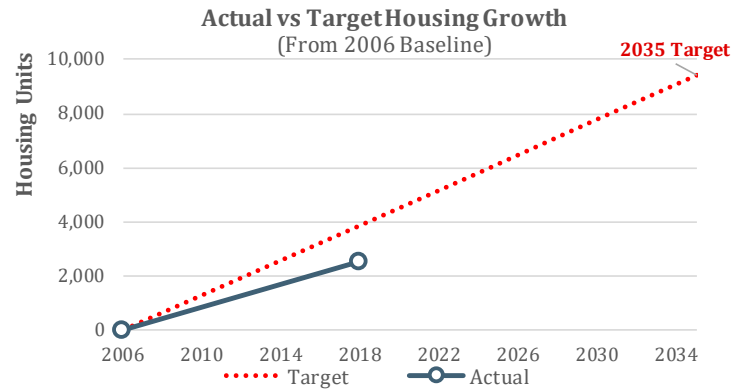
Job Capacity by Assumed Density Level	#	%
Very Low Density	414	56%
Low Density	325	44%
Medium Low Density	0	0%
Medium High Density	0	0%
High Density	0	0%
<i>Capacity in Pipeline</i>		13
Total Capacity (jobs)		752
Remaining Target (2018-2035)		5,780
Surplus/Deficit Capacity (jobs)		-5,027

Job Capacity by Land Use



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	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Needed to Meet 2035 Target
65.0%	0.59%	1.00%

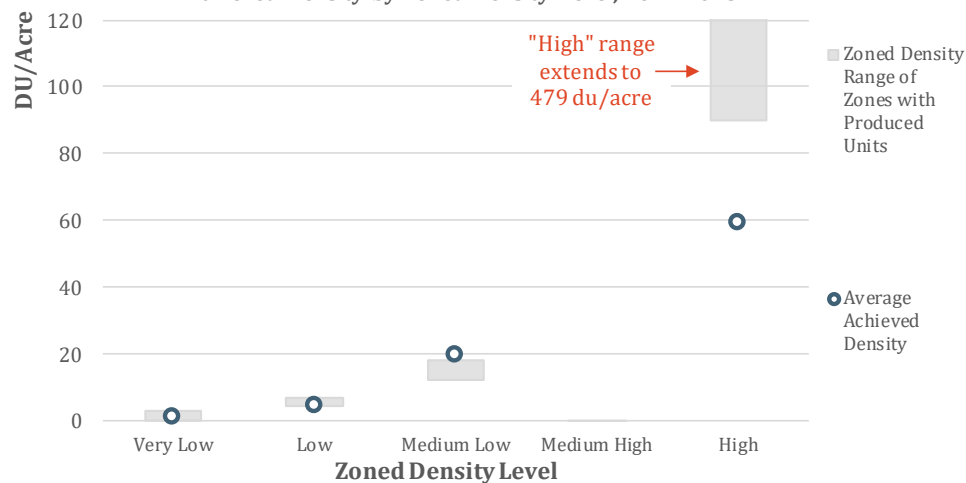
Since 2006, Federal Way has grown at 65% of the pace needed to achieve its 2035 housing growth target of 9,396 units. During this period, the total number of housing units in Federal Way grew by roughly 7%. At this current rate, Federal Way is under the production pace needed to meet its 2035 growth target, and needs to grow at an annual rate of 1% to reach its remaining target by 2035.

Residential Achieved Densities

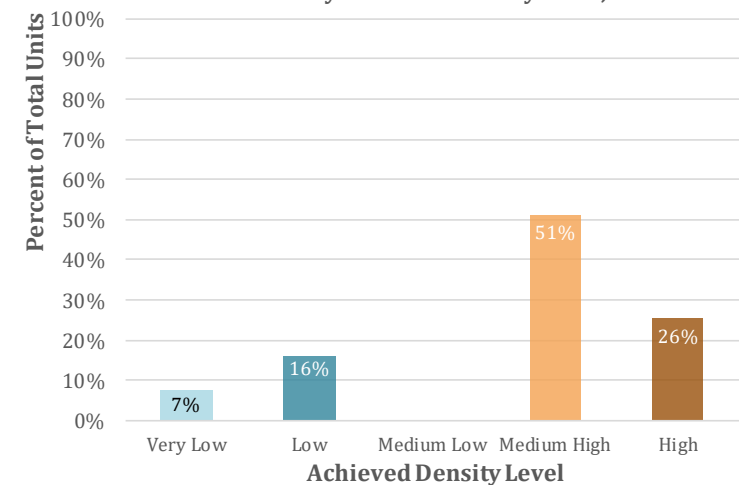
Zoned Density (du/acre)	Gross Area (acres)	Critical Areas (acres)	Public Purpose (acres)	ROWs (acres)	Net Area (acres)	Total Units	Achieved Density (DU/acre)
Very Low	0 - 4 du/acre	29.7	0.0	0.0	29.7	29	1.0
Low	4 - 10 du/acre	57.1	0.0	0.0	57.1	245	4.3
Medium Low	10 - 24 du/acre	59.0	17.9	7.1	33.7	659	19.5
Medium High	24 - 48 du/acre	0.0	0.0	0.0	0.0	0	
High	48 & up du/acre	14.1	0.0	0.5	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

Achieved Density by Zoned Density Level, 2012-2018

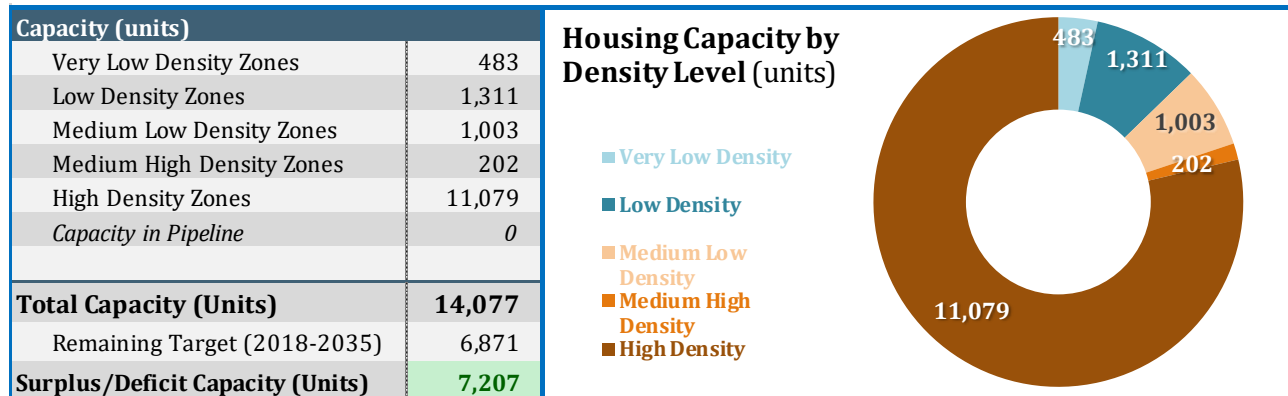


Permitted Units by Achieved Density Level, 2012-2018

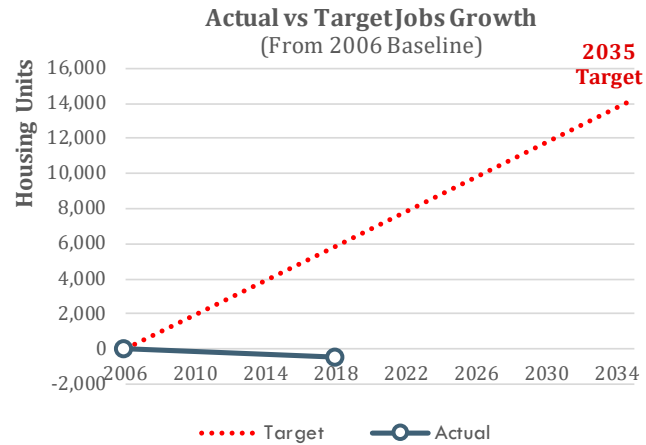


Federal Way - Residential Land Supply and Capacity

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				12.13	7.0% - 10.0%	34.88	12.1 / 18.2	479
	Redev Subtotal				24.82	7.0% - 10.0%	69.72	12.1 / 18.2	524
	Subtotal	307.20	154.15	0.00	36.95		104.60		1,003
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				17.27	10.0% - 10.0%	60.44	54.0 / 135.0	3,400
	Redev Subtotal				23.15	10.0% - 10.0%	81.03	54.0 / 135.0	7,679
	Subtotal	406.99	86.43	0.00	40.42		141.47		11,079
All Zones	Vacant Total				222.62		358.13		5,020
	Redev Total				303.07		494.43		9,057
	Total	3,604.46	1,846.21	0.00	525.68		852.56		14,077



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	14,268

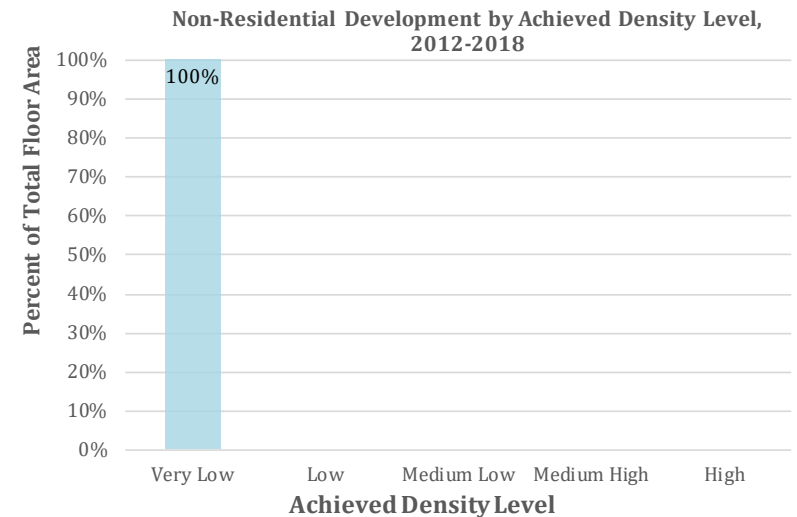
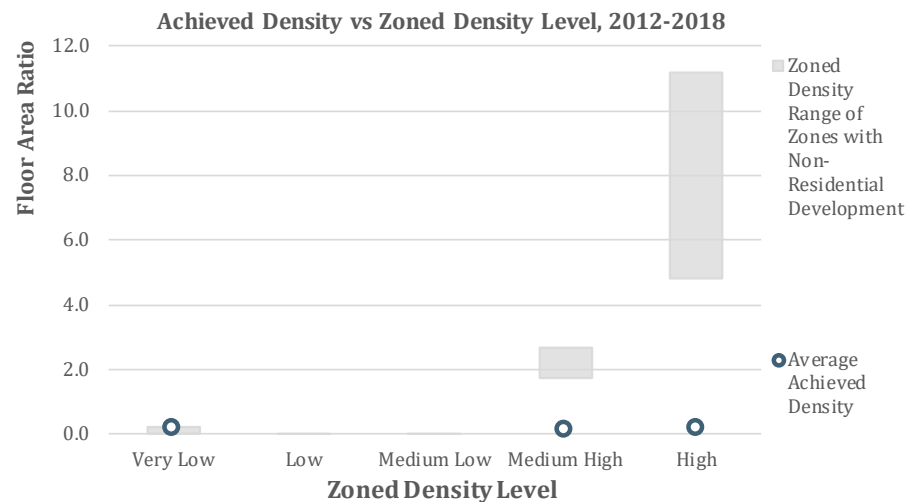
% of Pace Needed to Achieve 2035 Jobs Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Rate Needed to Meet 2035 Target
-7.9%	-0.12%	2.31%

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 2.3% 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	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



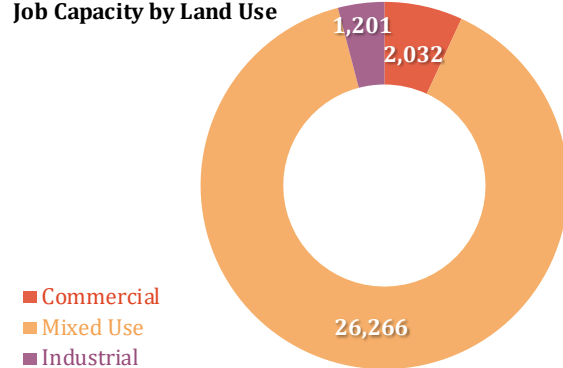
Federal Way - Commercial/Industrial Land Supply and Job Capacity

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	250.3	21.9	34.3	11.4	182.7	10%	159.9
Industrial	0.0	0.0	0.0	0.0	0.0	0%	0.0
Non-Res Land Total	786.3	246.2	81.0	27.0	432.1		362.5

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	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	3.00	0.18 / 4.90	0.01	1.24	450	2,761
Redevelopable	3.96	0.18 / 4.90	0.35	10.58	450	23,505
Mixed Use Total	6.96	0.18 / 4.90	0.36	11.82	450	26,266
Industrial*						
Vacant	1.29	0.40	0.00	0.52	1,100	469
Redevelopable	2.32	0.40	0.12	0.81	1,100	732
Industrial Total	3.61	0.40	0.12	1.32	1,100	1,201
City Total						
Commercial	8.82	0.38	0.69	1.82	700 / 900	2,032
Mixed Use	6.96	0.18 / 4.90	0.91	11.82	450	26,266
Industrial	3.61	0.40	0.26	1.32	1,100	1,201
<i>Job Capacity in Pipeline</i>						<i>0</i>
City Total	19.40	4.90	1.86	14.96	450 / 1100	29,500

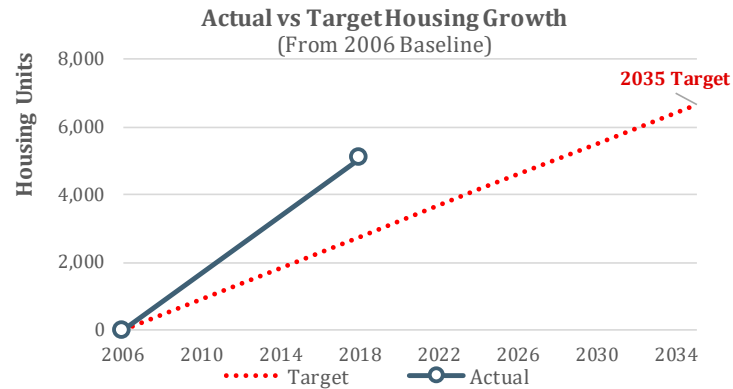
Job Capacity by Assumed Density Level	#	%
Very Low Density	1,673	6%
Low Density	3,174	11%
Medium Low Density	0	0%
Medium High Density	4,721	16%
High Density	19,933	68%
<i>Capacity in Pipeline</i>		<i>0</i>
Total Capacity (jobs)		29,500
Remaining Target (2018-2035)		14,736
Surplus/Deficit Capacity (jobs)		14,764

Job Capacity by Land Use



City of Issaquah

Housing Growth and Residential Development Trends



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

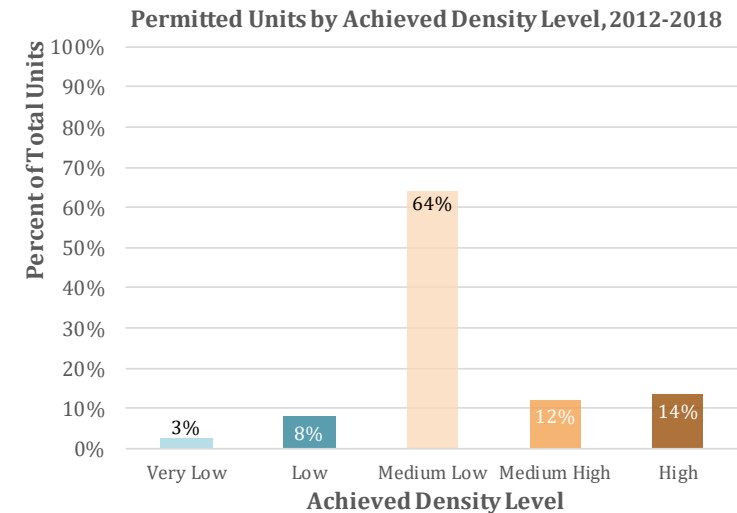
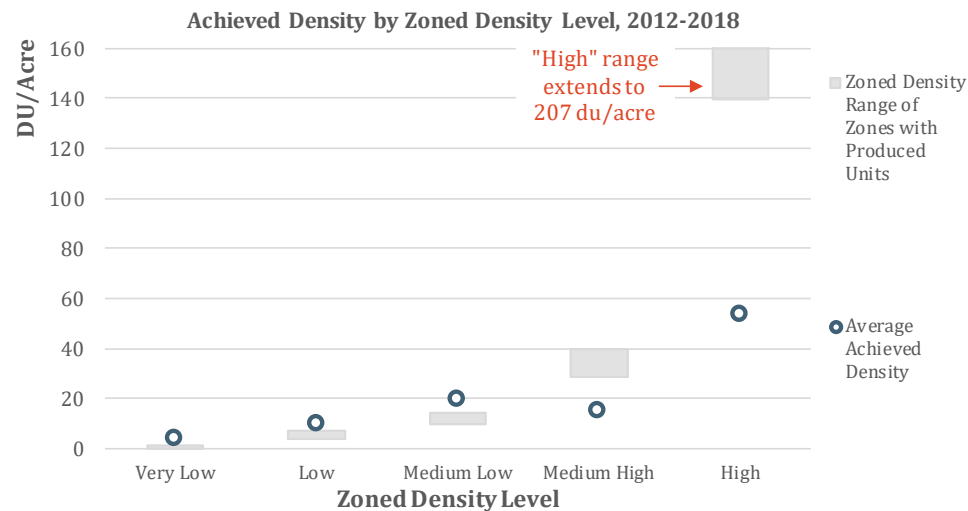
% of Pace Needed to Achieve 2035 Housing Growth Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Needed to Meet 2035 Target
184.6%	3.10%	0.53%

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 0.5% 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	26.0	7.3	0.0	18.7	78	4.2
Low	4 - 10 du/acre	47.7	0.3	0.0	47.4	481	10.1
Medium Low	10 - 24 du/acre	21.4	0.2	0.0	18.1	358	19.8
Medium High	24 - 48 du/acre	87.2	0.1	1.0	82.5	1,238	15.0
High	48 & up du/acre	9.7	3.0	0.0	6.6	356	53.6
Total	191.9	10.9	1.0	6.6	173.4	2,511	14.5

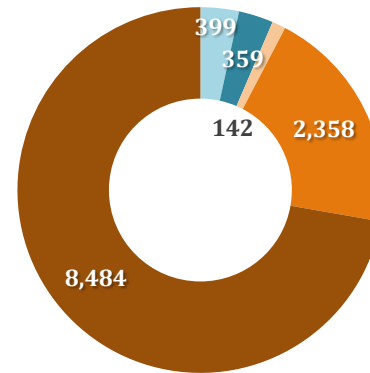
Achieved Density Level	Net Area (acres)	Total Units
Very Low	27.8	67
Low	26.7	196
Medium Low	103.0	1,606
Medium High	10.2	298
High	5.6	344
Total	173.4	2,511



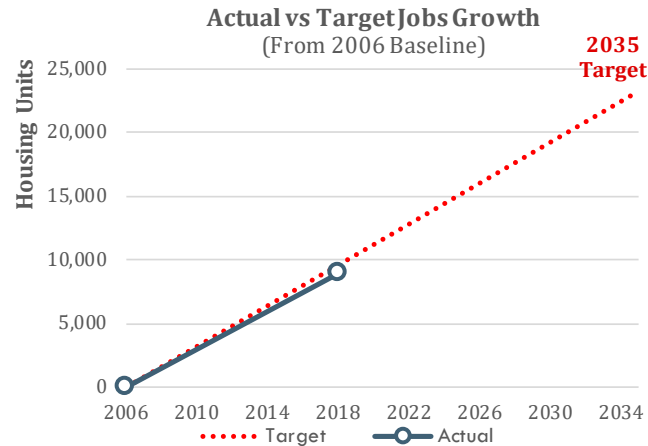
Issaquah - Residential Land Supply and Capacity

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)		Housing Capacity by Density Level (units) <ul style="list-style-type: none"> Very Low Density Low Density Medium Low Density Medium High Density High Density
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	



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

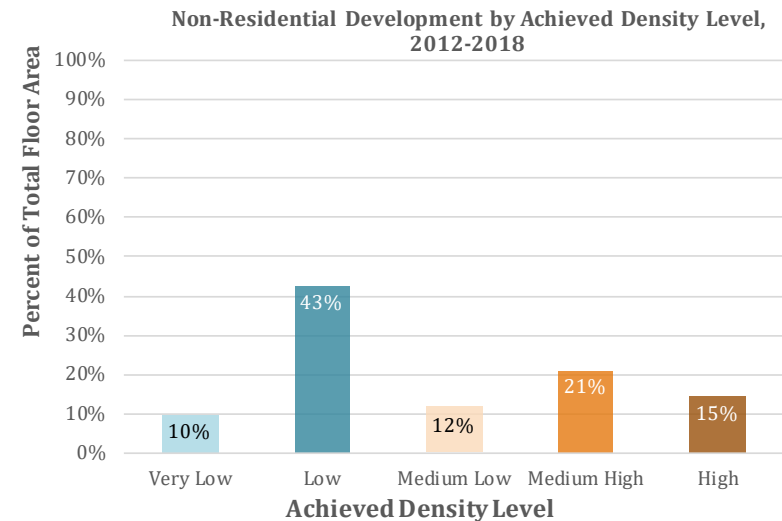
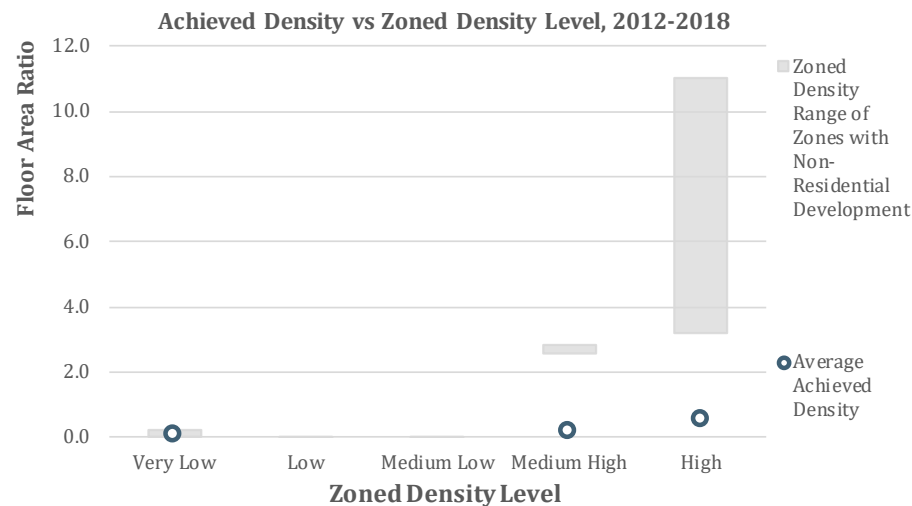
% of Pace Needed to Achieve 2035 Jobs Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Rate Needed to Meet 2035 Target
93.2%	3.29%	2.46%

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 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	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



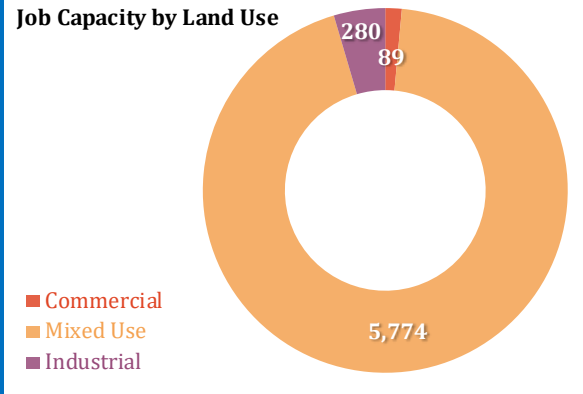
Issaquah - Commercial/Industrial Land Supply and Job Capacity

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	2,657
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
<i>Job Capacity in Pipeline</i>						<i>9,418</i>
City Total	8.59	1.50	1.86	1.79	0 / 700	15,561

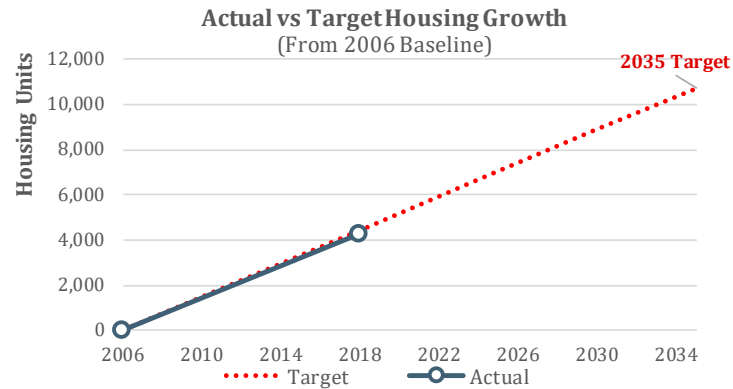
Job Capacity by Assumed Density Level	#	%
Very Low Density	125	2%
Low Density	469	8%
Medium Low Density	5,549	90%
Medium High Density	0	0%
High Density	0	0%
<i>Capacity in Pipeline</i>		<i>9,418</i>
Total Capacity (jobs)		15,561
Remaining Target (2018-2035)		14,250
Surplus/Deficit Capacity (jobs)		1,311

Job Capacity by Land Use



City of Kent

Housing Growth and Residential Development Trends



Kent Housing Growth Target: 2006-2035	
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	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Needed to Meet 2035 Target
95.7%	0.78%	0.75%

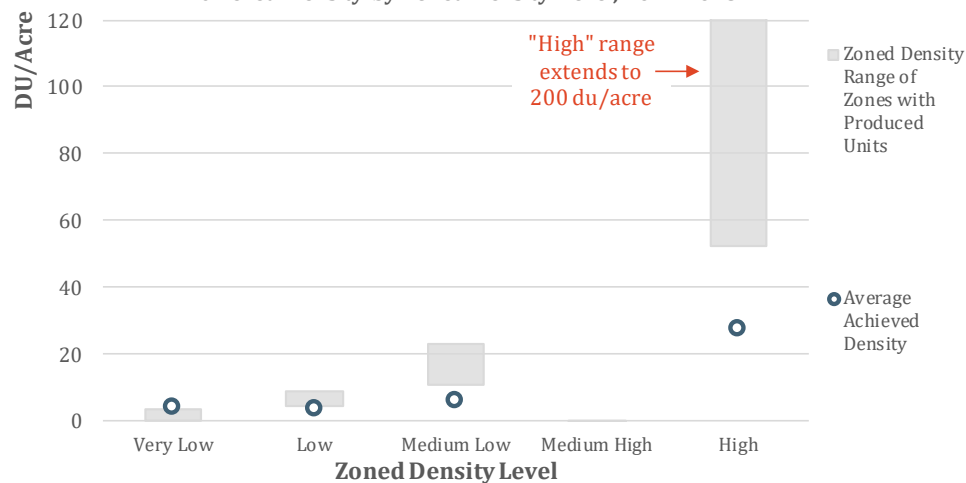
Since 2006, Kent has grown at 96% of the pace needed to achieve its 2035 housing growth target of 10,753 units. During this period, the total number of housing units in Kent grew by roughly 10%. At this current rate, Kent is under the production pace needed to meet its 2035 growth target, and needs to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

Residential Achieved Densities

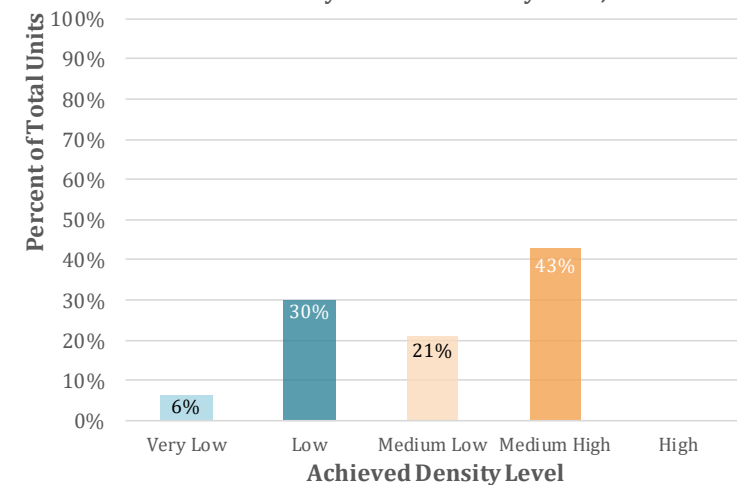
Zoned Density (du/acre)		Gross Area (acres)	Critical Areas (acres)	Public Purpose (acres)	ROWs (acres)	Net Area (acres)	Total Units	Achieved Density (DU/acre)
Very Low	0 - 4 du/acre	81.2	27.5	0.0	41.7	11.9	48	4.0
Low	4 - 10 du/acre	275.7	54.6	0.0	22.1	199.0	644	3.2
Medium Low	10 - 24 du/acre	50.2	4.6	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

Achieved Density by Zoned Density Level, 2012-2018

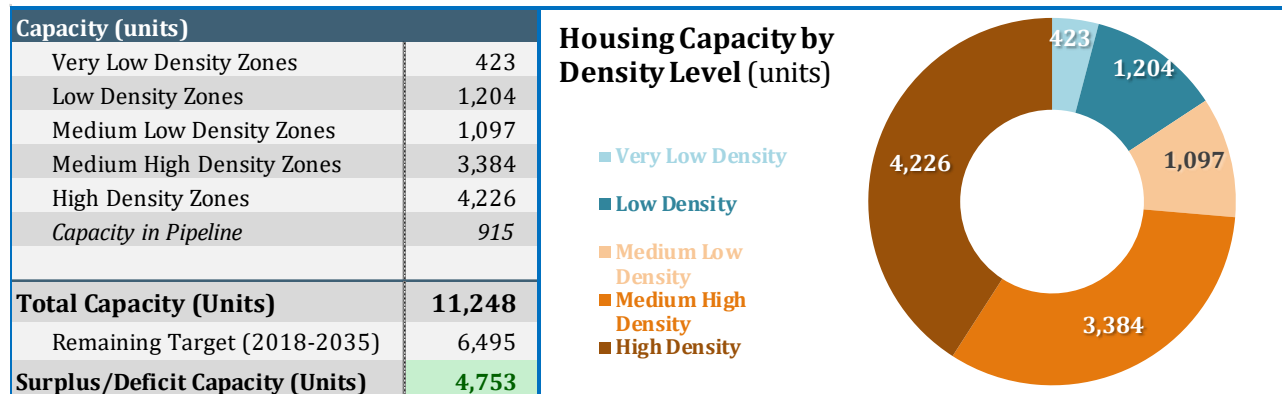


Permitted Units by Achieved Density Level, 2012-2018

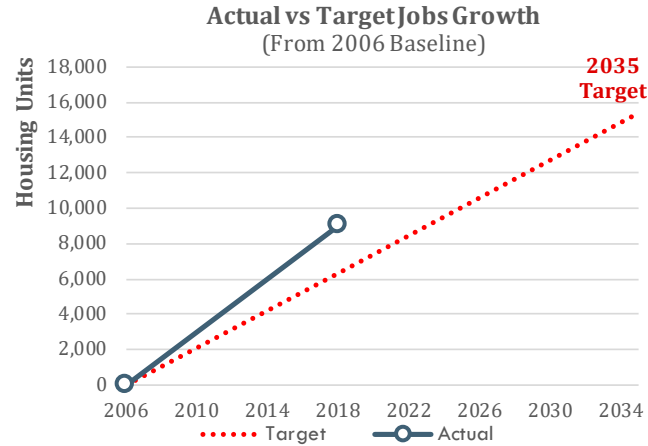


Kent - Residential Land Supply and Capacity

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	590.80	263.04	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	880.15	287.95	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	109.77	27.80	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	190.23	84.70	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	79.72	22.92	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	1,850.67	686.40	0.00	116.73		921.95		10,333



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

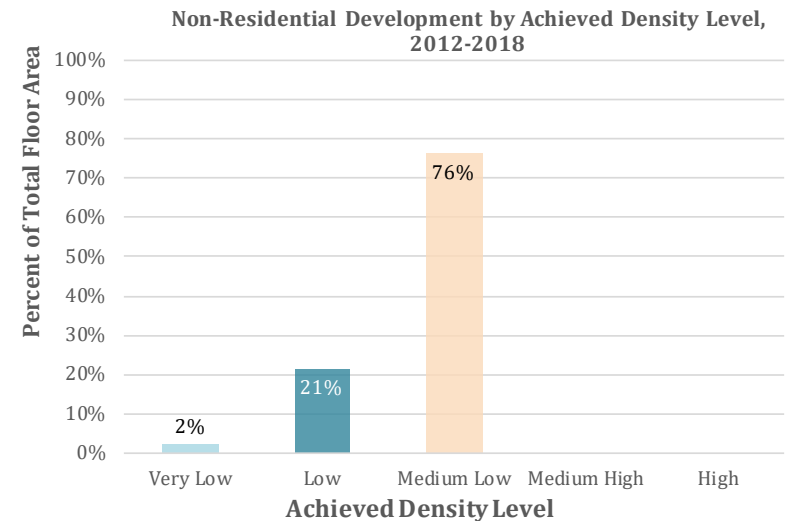
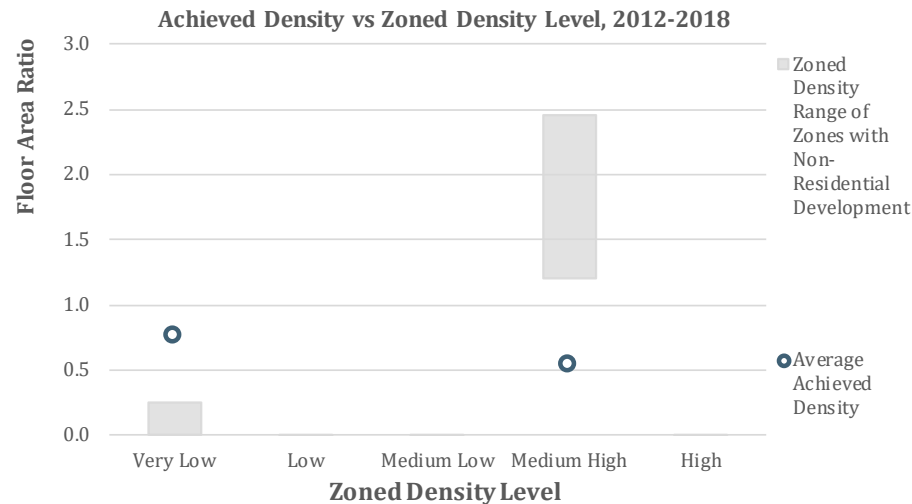
% of Pace Needed to Achieve 2035 Jobs Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Rate Needed to Meet 2035 Target
142.1%	1.12%	0.50%

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	9,201,069	4,998,503	0.5
High 3.0 & up FAR	0	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

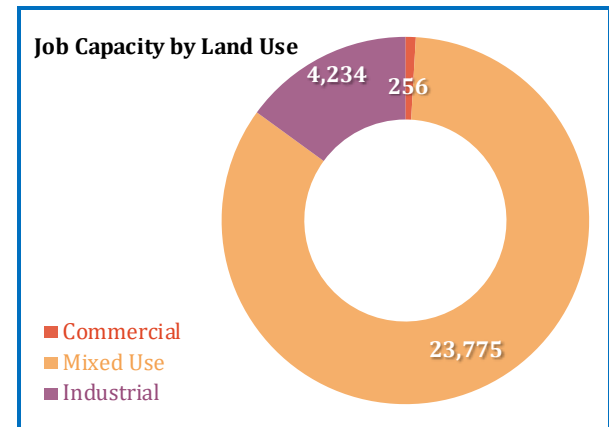


Kent - Commercial/Industrial Land Supply and Job Capacity

Land Supply	Gross Area (acres)	Critical Areas (acres)	ROWs (acres)	Public Purpose (acres)	Initial Land Supply	Market Factor	Buildable Area (acres)
Vacant / Redev.							
Commercial	50.6	44.4	1.2	0.6	4.3	50%	1.2
Mixed Use	425.5	146.3	55.8	27.9	195.4	11% - 20%	162.6
Industrial	654.3	142.4	102.4	51.2	358.3	5%	332.7
Non-Res Land Total	1130.3	333.0	159.5	79.7	558.1		496.6

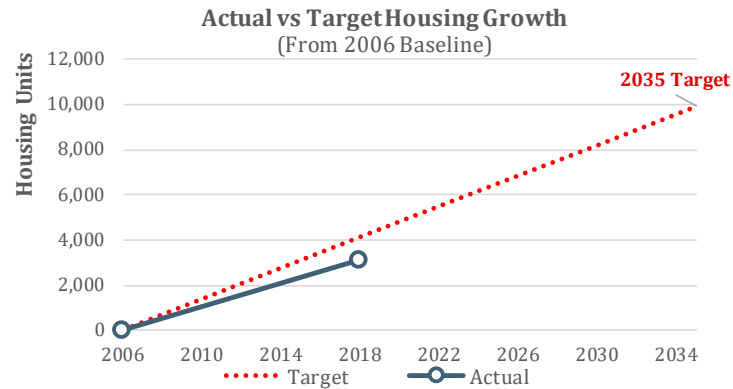
Job Capacity by Land Use	Net Buildable Area (mil.sq.ft.)	Assumed Density Range (FAR)	Existing Floor Area (million sq.ft.)	Floor Area Capac. (million sq.ft.)	Sq. ft. per Job	Job Capacity
Commercial*						
Vacant	1.29	0.09 / 0.28	0.00	0.27	300 / 1200	252
Redevelopable	0.72	0.09 / 0.28	0.17	0.01	1,200	5
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	3,746
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	1,444
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
<i>Job Capacity in Pipeline</i>						<i>730</i>
City Total	23.59	2.45	1.86	12.49	300 / 1200	28,995

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%
<i>Capacity in Pipeline</i>		<i>730</i>
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	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Needed to Meet 2035 Target
75.4%	0.70%	0.96%

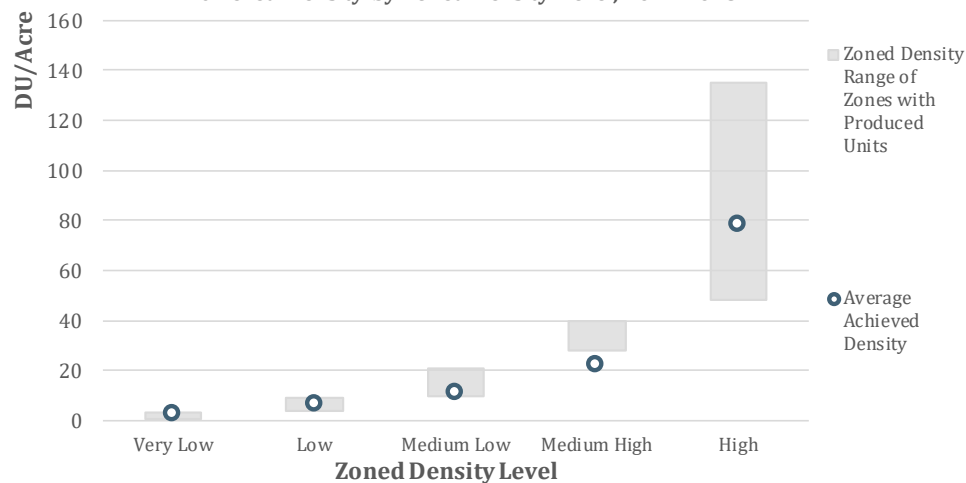
Since 2006, Kirkland has grown at 75% of the pace needed to achieve its 2035 housing growth target of 9,941 units. During this period, the total number of housing units in Kirkland grew by roughly 9%. At this current rate, Kirkland is under the production pace needed to meet its 2035 growth target, and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

Residential Achieved Densities

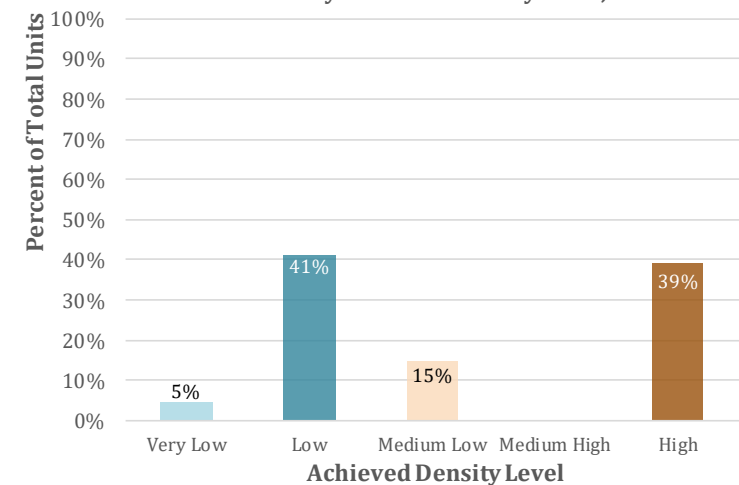
Zoned Density (du/acre)	Gross Area (acres)	Critical Areas (acres)	Public Purpose (acres)	ROWs (acres)	Net Area (acres)	Total Units	Achieved Density (DU/acre)
Very Low	0 - 4 du/acre	5.9	0.1	0.0	5.8	17	2.9
Low	4 - 10 du/acre	146.8	5.5	0.0	141.2	888	6.3
Medium Low	10 - 24 du/acre	17.1	1.2	0.0	15.9	177	11.1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

Achieved Density by Zoned Density Level, 2012-2018

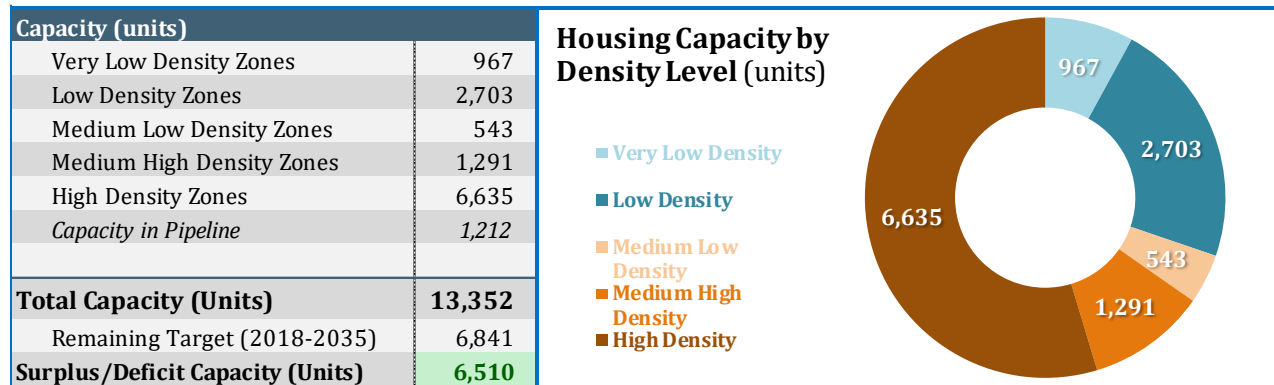


Permitted Units by Achieved Density Level, 2012-2018

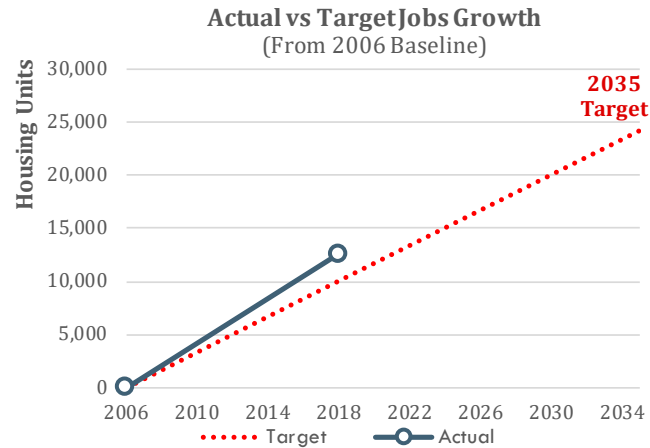


Kirkland – Residential Land Supply and Capacity

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



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

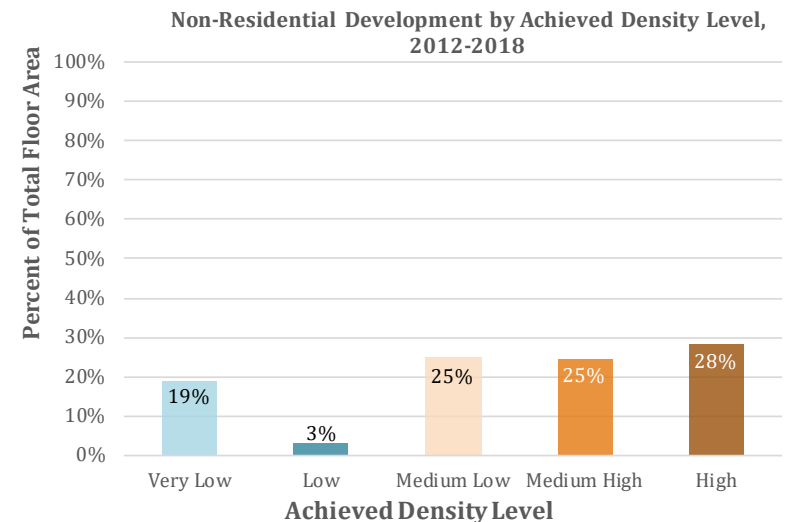
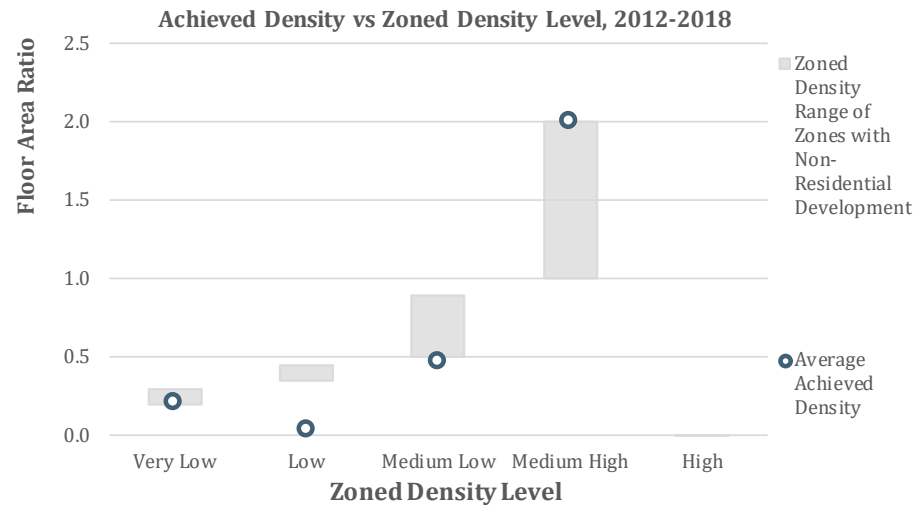
% of Pace Needed to Achieve 2035 Jobs Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Rate Needed to Meet 2035 Target
125.7%	2.49%	1.25%

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 1.3% 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	1,125,119	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



Kirkland – Commercial/Industrial Land Supply and Job Capacity

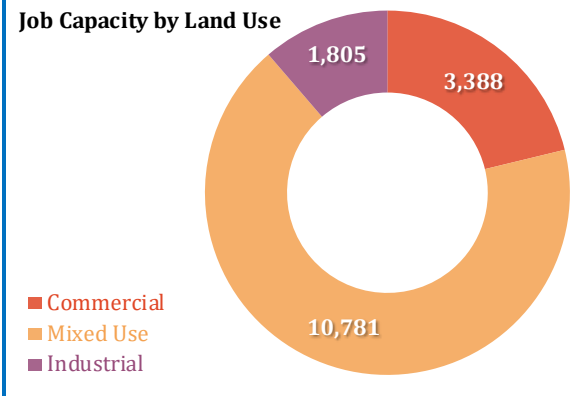
Land Supply	Gross Area (acres)	Critical Areas (acres)	ROWs (acres)	Public Purpose (acres)	Initial Land Supply	Market Factor	Buildable Area (acres)
Vacant / Redev.							
Commercial	87.3	11.0	1.5	0.0	74.8	5%	71.0
Mixed Use	191.8	16.2	3.5	0.0	172.1	7% - 17%	159.7
Industrial	1.1	1.1	0.0	0.0	0.0	0%	0.0
Non-Res 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
<i>Job Capacity in Pipeline</i>						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.

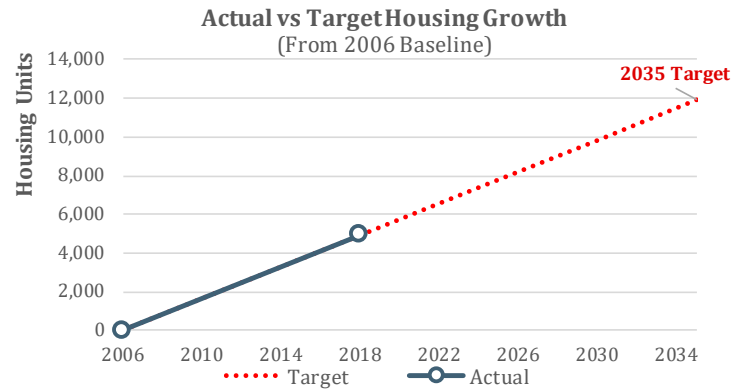
Job Capacity by Assumed Density Level	#	%
Very Low Density	525	3%
Low Density	1,206	8%
Medium Low Density	5,636	35%
Medium High Density	6,692	42%
High Density	1,914	12%
<i>Capacity in Pipeline</i>		2,165
Total Capacity (jobs)		18,139
Remaining Target (2018-2035)		11,604
Surplus/Deficit Capacity (jobs)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

Job Capacity by Land Use



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	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Needed to Meet 2035 Target
100.5%	1.65%	1.32%

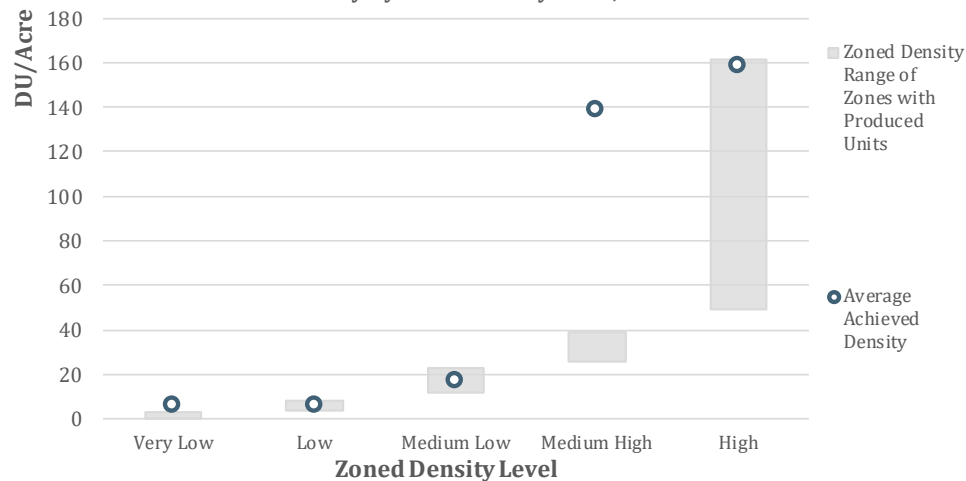
Since 2006, Redmond has grown at 100% of the pace needed to achieve its 2035 housing growth target of 11,896 units. During this period, the total number of housing units in Redmond grew by roughly 22%. At this current rate, Redmond is over the production pace needed to meet its 2035 growth target, and needs to grow at an annual rate of 1.3% to reach its remaining target by 2035.

Residential Achieved Densities

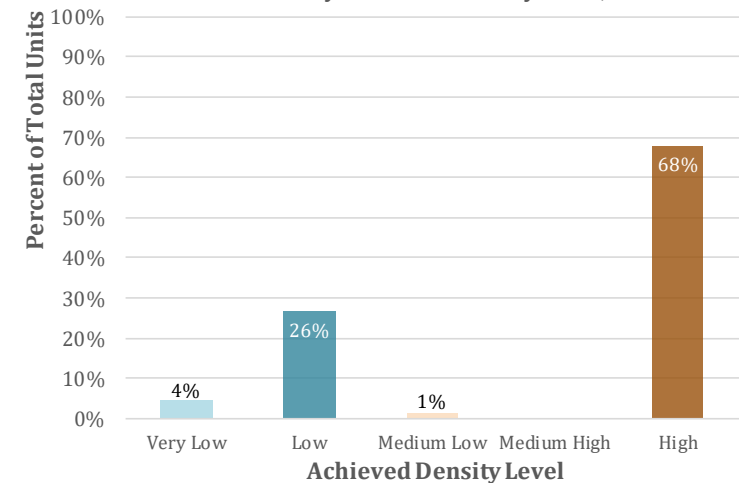
Zoned Density (du/acre)	Gross Area (acres)	Critical Areas (acres)	Public Purpose (acres)	ROWs (acres)	Net Area (acres)	Total Units	Achieved Density (DU/acre)
Very Low	0 - 4 du/acre	3.0	0.0	0.0	3.0	17	5.6
Low	4 - 10 du/acre	179.1	3.2	0.0	175.9	1,099	6.2
Medium Low	10 - 24 du/acre	2.6	0.0	0.0	2.6	44	16.7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

Achieved Density by Zoned Density Level, 2012-2018

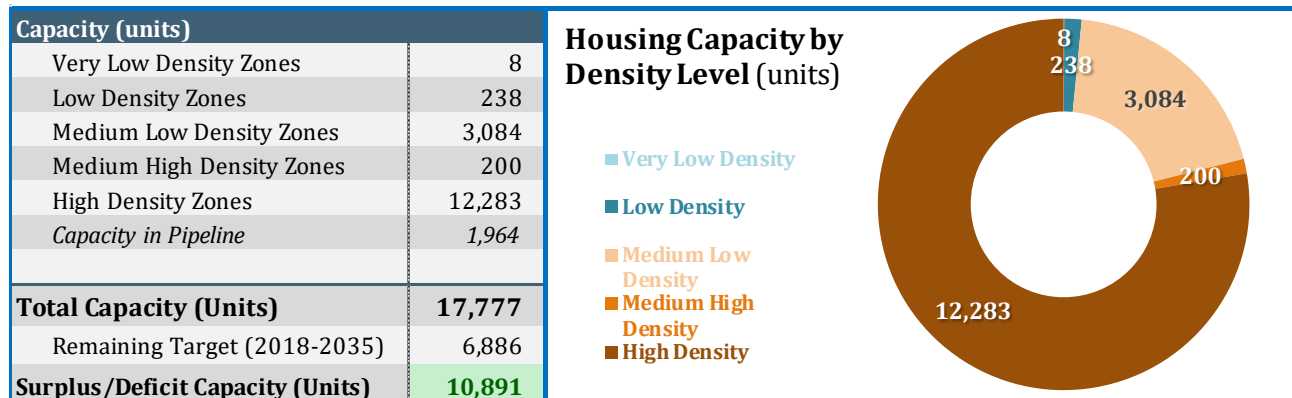


Permitted Units by Achieved Density Level, 2012-2018

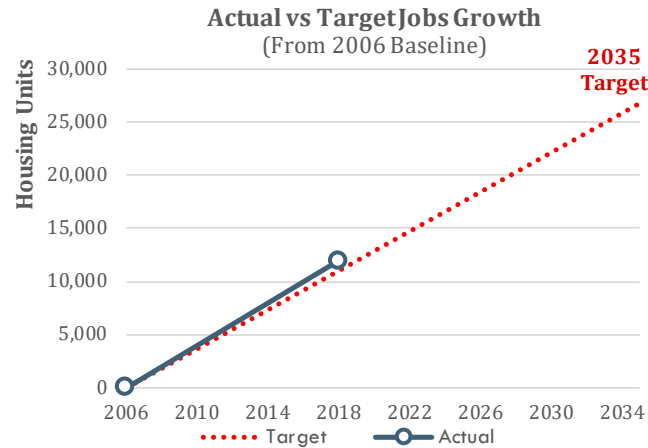


Redmond - Residential Land Supply and Capacity

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				0.36	10.0% - 10.0%	1.80	0.1 / 3.0	3
	Redev Subtotal				0.62	10.0% - 10.0%	3.08	0.1 / 3.0	5
	Subtotal	209.70	193.62	9.50	0.98		4.88		8
Low Density	Vacant Subtotal				5.42	10.0% - 10.0%	27.08	4.0 / 9.4	129
	Redev Subtotal				12.35	10.0% - 10.0%	61.74	4.0 / 9.4	110
	Subtotal	493.36	212.07	162.87	17.76		88.82		238
Medium Low Density	Vacant Subtotal				6.41	5.0% - 10.0%	55.91	12.0 / 23.0	1,175
	Redev Subtotal				10.38	5.0% - 10.0%	89.30	12.0 / 23.0	1,908
	Subtotal	201.95	29.85	0.49	16.79		145.21		3,084
Medium High Density	Vacant Subtotal				0.14	7.0% - 7.0%	1.16	39.2 / 43.6	51
	Redev Subtotal				0.88	7.0% - 7.0%	7.27	39.2 / 43.6	149
	Subtotal	10.15	0.00	0.00	1.02		8.43		200
High Density	Vacant Subtotal				0.70	5.0% - 10.0%	5.78	49.2 / 161.2	315
	Redev Subtotal				13.82	5.0% - 10.0%	115.93	49.2 / 161.2	11,968
	Subtotal	149.35	2.61	1.35	14.52		121.71		12,283
All Zones	Vacant Total				13.02		91.73		1,672
	Redev Total				38.04		277.31		14,141
	Total	1,064.52	438.15	174.21	51.07		369.04		15,813



Redmond - Employment Growth and Commercial/Industrial Development Trends



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

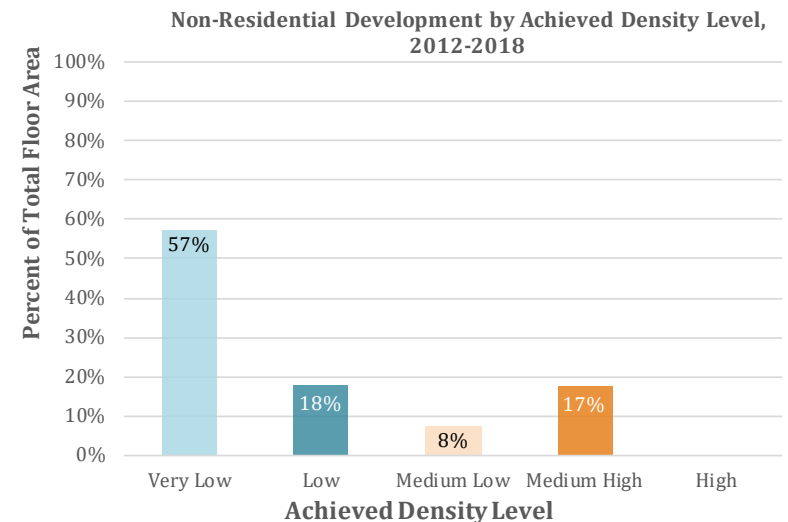
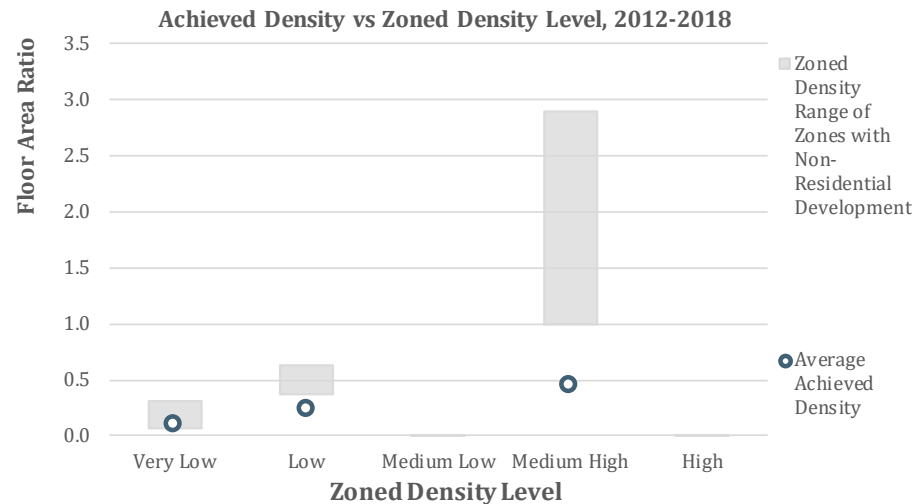
% of Pace Needed to Achieve 2035 Jobs Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Rate Needed to Meet 2035 Target
108.4%	1.15%	0.87%

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



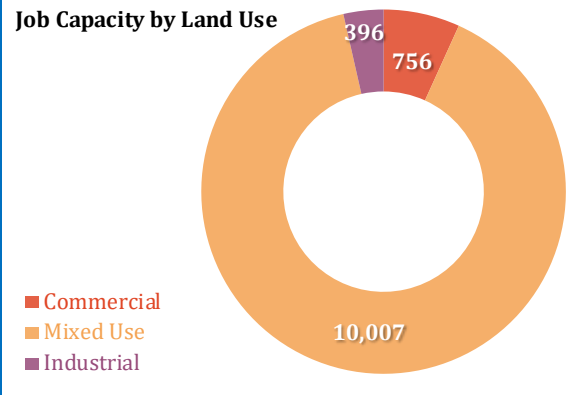
Redmond - Commercial/Industrial Land Supply and Job Capacity

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	695.2	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
<i>Job Capacity in Pipeline</i>						4,693
City Total	17.47	0.03 / 1.13	1.86	3.59	300 / 730	15,851

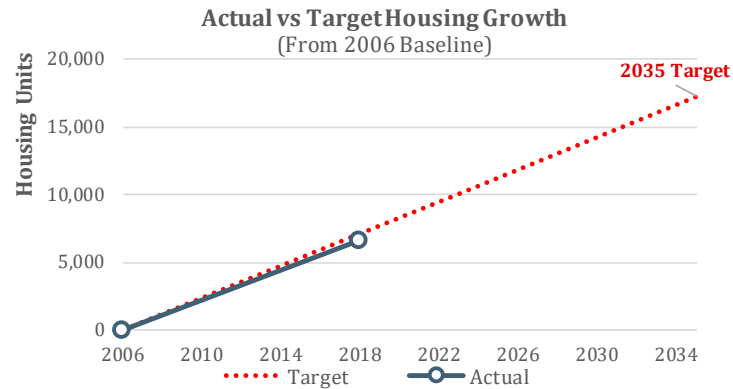
Job Capacity by Assumed Density Level	#	%
Very Low Density	1,505	13%
Low Density	8,656	78%
Medium Low Density	997	9%
Medium High Density	0	0%
High Density	0	0%
<i>Capacity in Pipeline</i>		4,693
Total Capacity (jobs)		15,851
Remaining Target (2018-2035)		14,713
Surplus/Deficit Capacity (jobs)		1,138

Job Capacity by Land Use



City of Renton

Housing Growth and Residential Development Trends



Renton Housing Growth Target: 2006-2035	
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	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Needed to Meet 2035 Target
92.7%	1.41%	1.31%

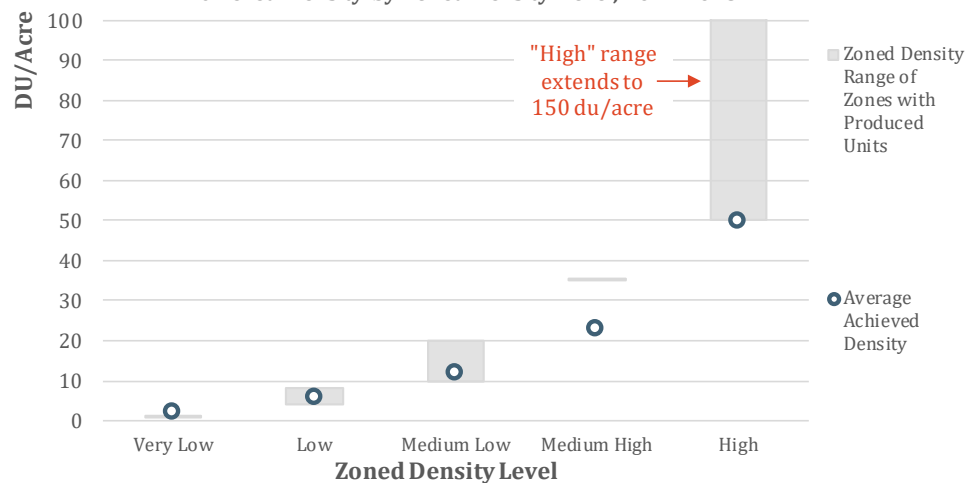
Since 2006, Renton has grown at 93% of the pace needed to achieve its 2035 housing growth target of 17,231 units. During this period, the total number of housing units in Renton grew by roughly 18%. At this current rate, Renton is under the production pace needed to meet its 2035 growth target, and needs to grow at an annual rate of 1.3% to reach its remaining target by 2035.

Residential Achieved Densities

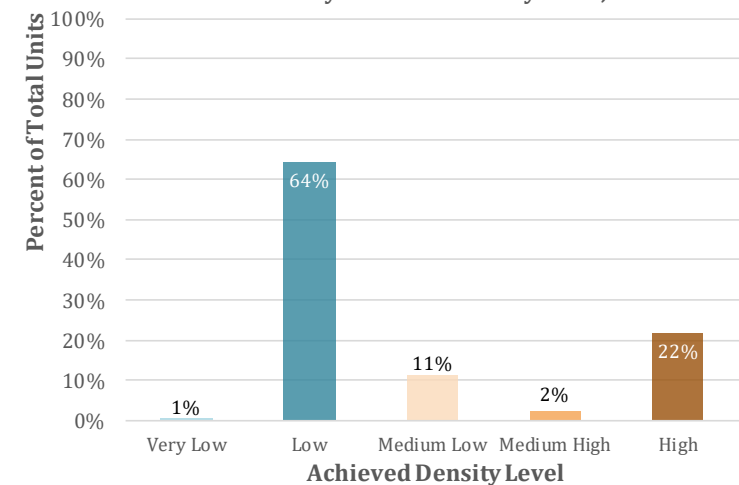
Zoned Density (du/acre)	Gross Area (acres)	Critical Areas (acres)	Public Purpose (acres)	ROWs (acres)	Net Area (acres)	Total Units	Achieved Density (DU/acre)
Very Low	0 - 4 du/acre	14.8	2.7	3.9	0.0	8.2	16
Low	4 - 10 du/acre	378.1	45.4	13.0	50.8	269.0	1,550
Medium Low	10 - 24 du/acre	48.6	3.2	0.6	6.4	38.3	452
Medium High	24 - 48 du/acre	0.2	0.0	0.0	0.0	0.2	5
High	48 & up du/acre	17.5	1.8	0.4	2.7	12.7	630
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

Achieved Density by Zoned Density Level, 2012-2018

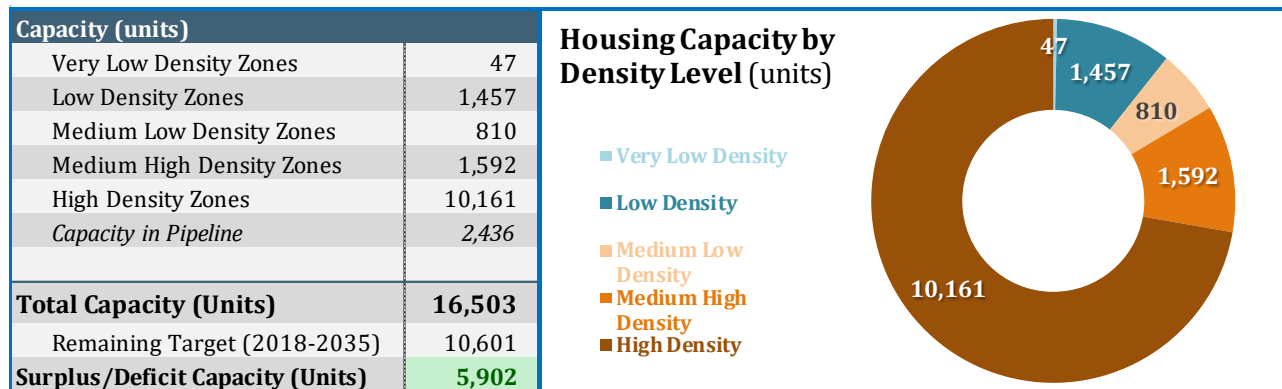


Permitted Units by Achieved Density Level, 2012-2018

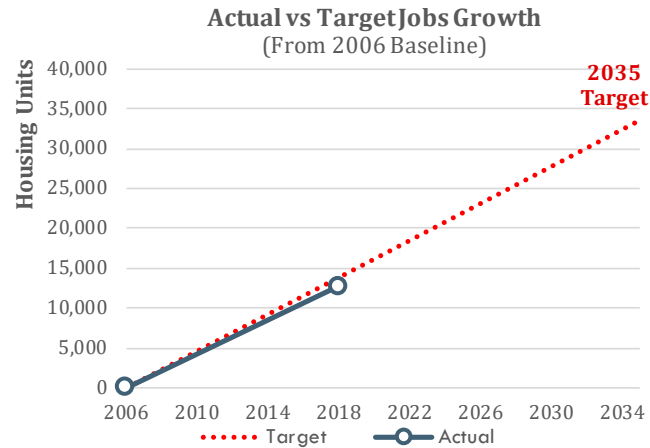


Renton - Residential Land Supply and Capacity

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



Renton - Employment Growth and Commercial/Industrial Development Trends



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

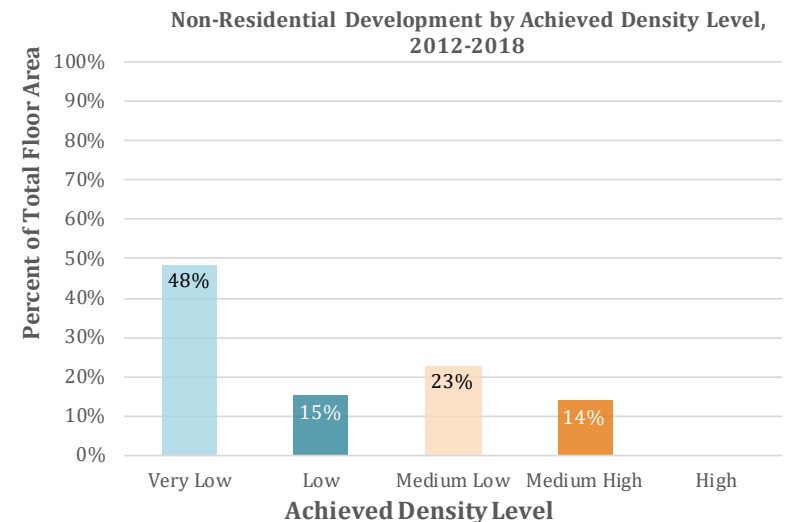
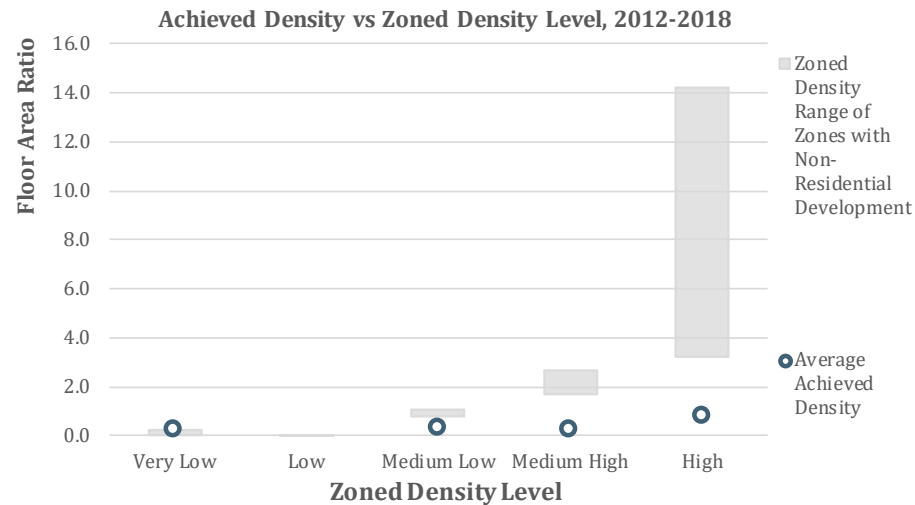
% of Pace Needed to Achieve 2035 Jobs Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Rate Needed to Meet 2035 Target
91.4%	1.80%	1.63%

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 1.6% 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	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

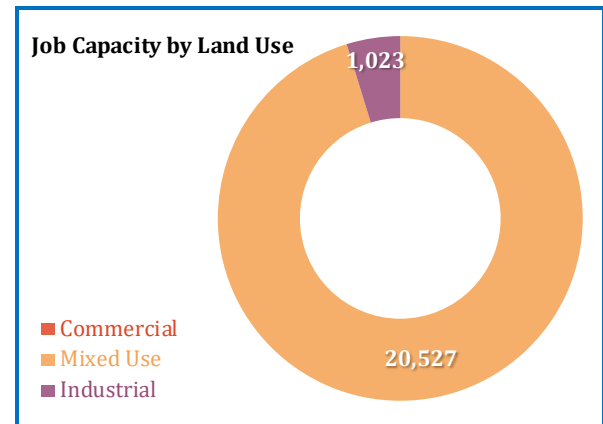


Renton - Commercial/Industrial Land Supply and Job Capacity

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

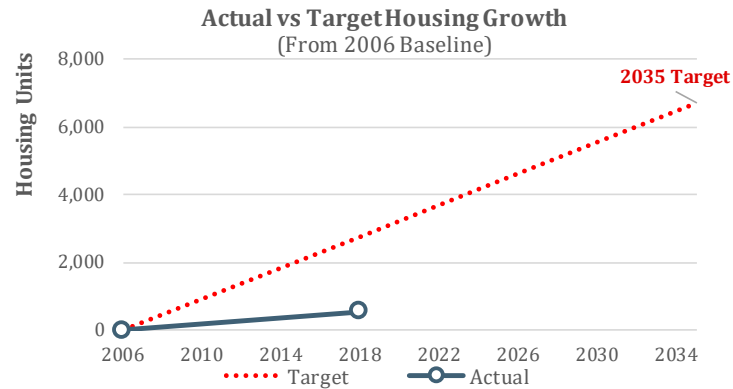
Job Capacity by Land Use	Net Buildable Area (mil.sq.ft.)	Assumed Density Range (FAR)	Existing Floor Area (million sq.ft.)	Floor Area Capac. (million sq.ft.)	Sq. ft. per Job	Job Capacity
Commercial						
Vacant	0.00	0.00	0.00	0.00	0	0
Redevelopable	0.00	0.00	0.00	0.00	0	0
Commercial Total	0.00	0.00	0.00	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
<i>Job Capacity in Pipeline</i>						<i>4,660</i>
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%
<i>Capacity in Pipeline</i>		<i>4,660</i>
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

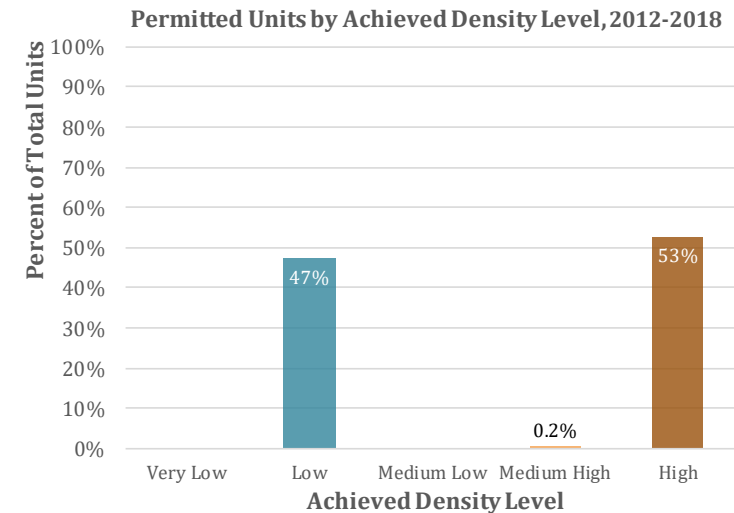
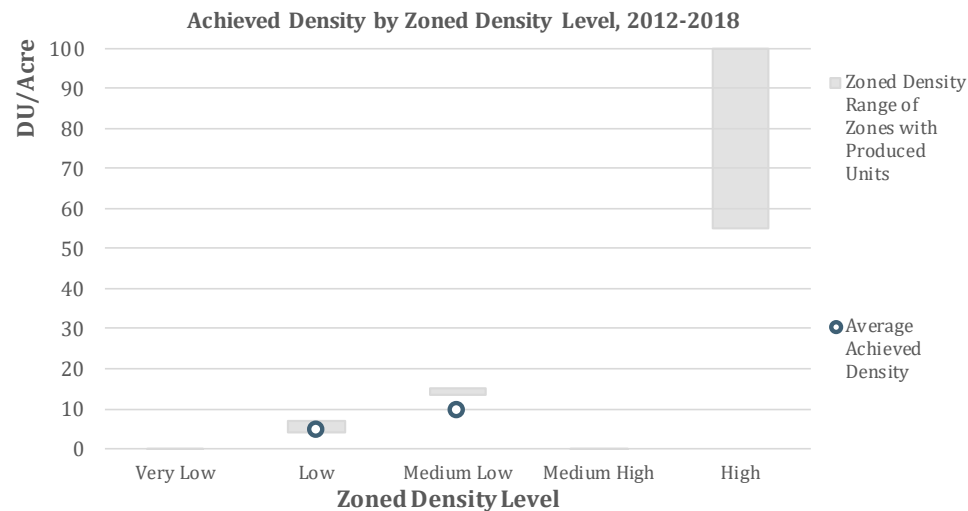
% of Pace Needed to Achieve 2035 Housing Growth Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Needed to Meet 2035 Target
19.7%	0.43%	2.69%

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 2.7% to reach its remaining target by 2035.

Residential Achieved Densities

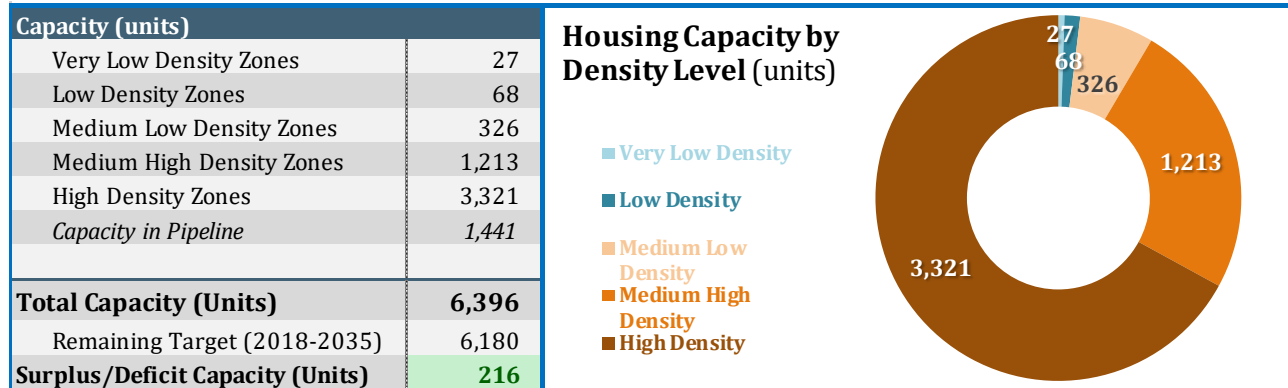
Zoned Density (du/acre)	Gross Area (acres)	Critical Areas (acres)	Public Purpose (acres)	ROWs (acres)	Net Area (acres)	Total Units	Achieved Density (DU/acre)
Very Low	0 - 4 du/acre	0.0	0.0	0.0	0.0	0	
Low	4 - 10 du/acre	16.8	0.0	0.0	16.8	79	4.7
Medium Low	10 - 24 du/acre	23.0	4.1	0.0	18.9	180	9.5
Medium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

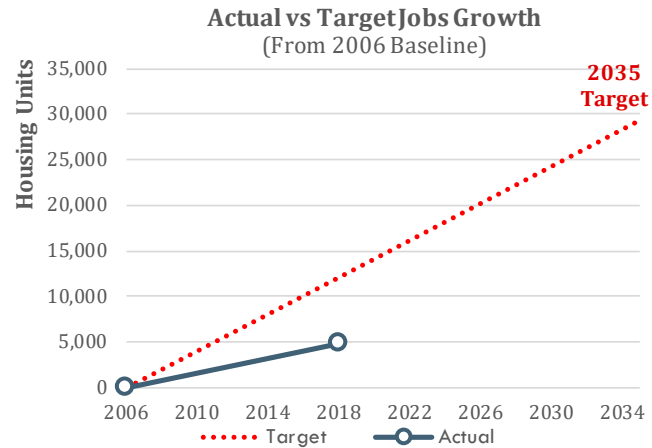


SeaTac - Residential Land Supply and Capacity

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



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

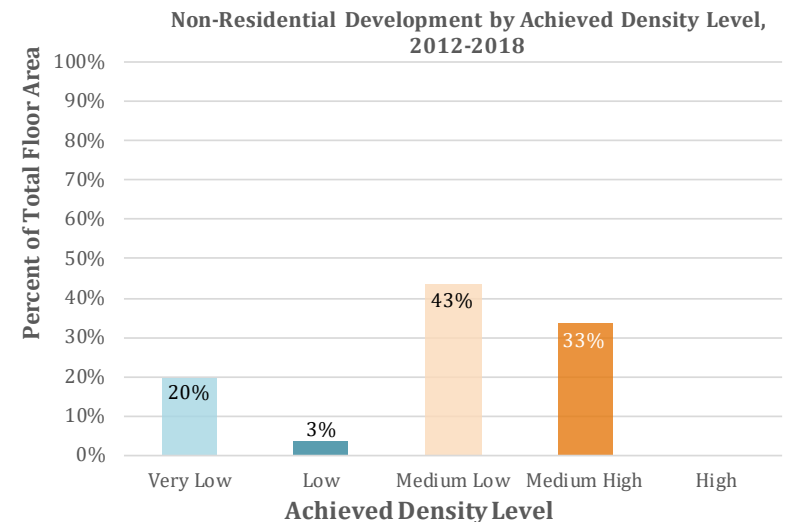
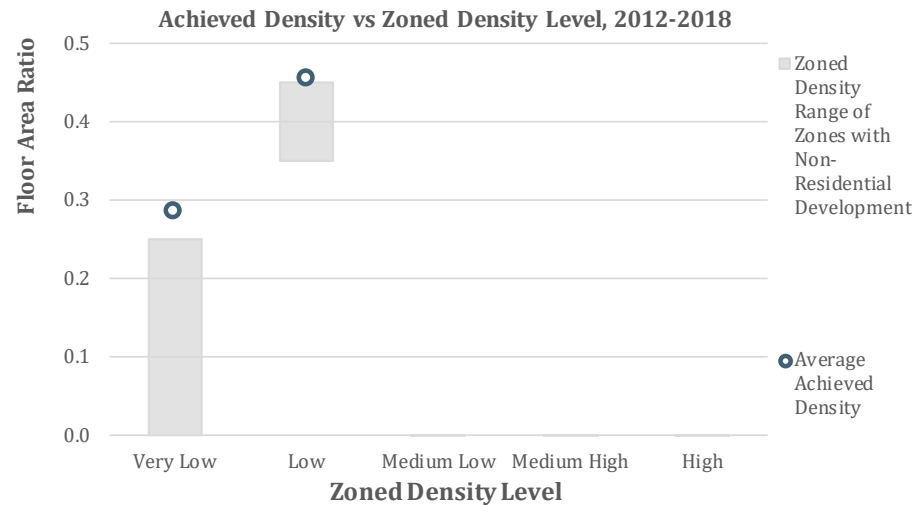
% of Pace Needed to Achieve 2035 Jobs Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Rate Needed to Meet 2035 Target
40.7%	1.29%	3.20%

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 3.2% 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



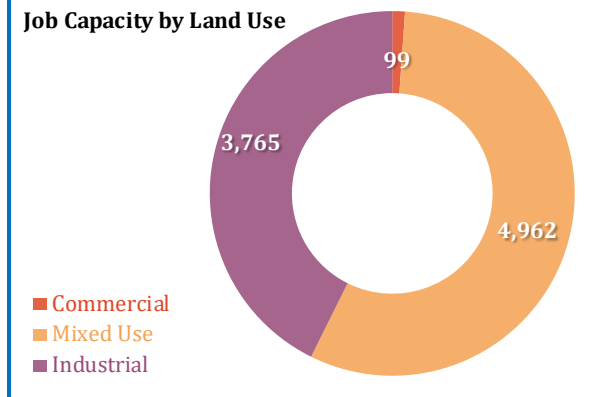
SeaTac - Commercial/Industrial Land Supply and Job Capacity

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
<i>Job Capacity in Pipeline</i>						6,739
City Total	9.58	0.35 / 1.50	1.86	6.61	600 / 1200	15,565

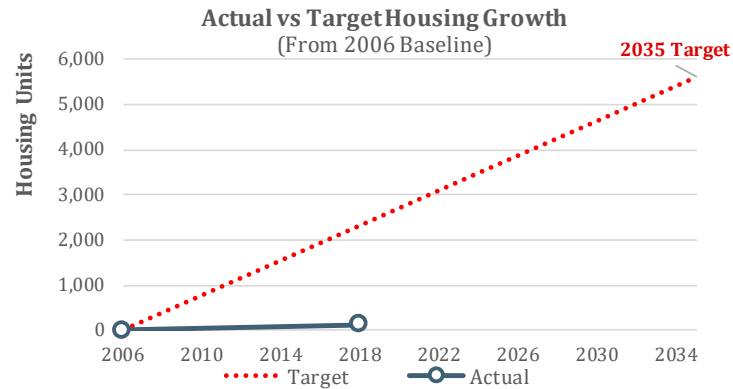
Job Capacity by Assumed Density Level	#	%
Very Low Density	0	0%
Low Density	1,709	19%
Medium Low Density	269	3%
Medium High Density	6,848	78%
High Density	0	0%
<i>Capacity in Pipeline</i>		6,739
Total Capacity (jobs)		15,565
Remaining Target (2018-2035)		24,411
Surplus/Deficit Capacity (jobs)		-8,846

Job Capacity by Land Use



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	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Needed to Meet 2035 Target
5.6%	0.14%	3.17%

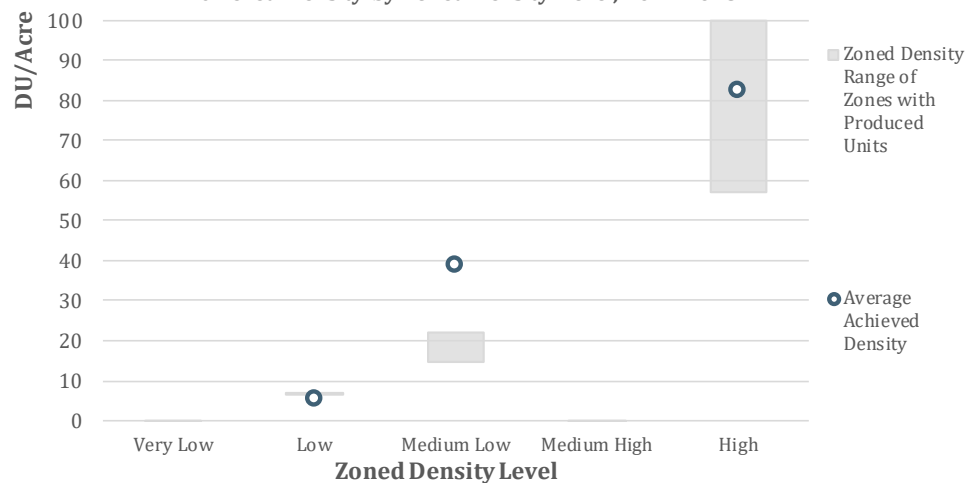
Since 2006, Tukwila has grown at 6% of the pace needed to achieve its 2035 housing growth target of 5,626 units. During this period, the total number of housing units in Tukwila grew by roughly 2%. At this current rate, Tukwila is under the production pace needed to meet its 2035 growth target, and needs to grow at an annual rate of 3.2% to reach its remaining target by 2035.

Residential Achieved Densities

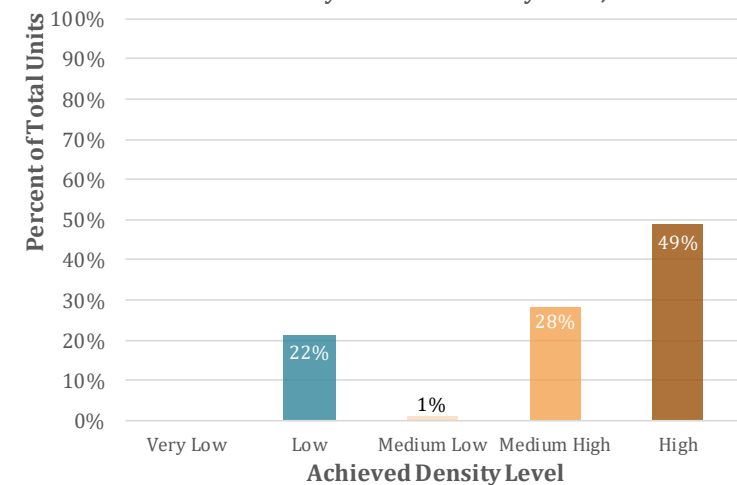
Zoned Density (du/acre)	Gross Area (acres)	Critical Areas (acres)	Public Purpose (acres)	ROWs (acres)	Net Area (acres)	Total Units	Achieved Density (DU/acre)
Very Low	0 - 4 du/acre	0.0	0.0	0.0	0.0	0	
Low	4 - 10 du/acre	35.6	1.7	2.3	31.6	163	5.2
Medium Low	10 - 24 du/acre	4.2	0.0	0.2	4.0	155	38.9
Medium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

Achieved Density by Zoned Density Level, 2012-2018

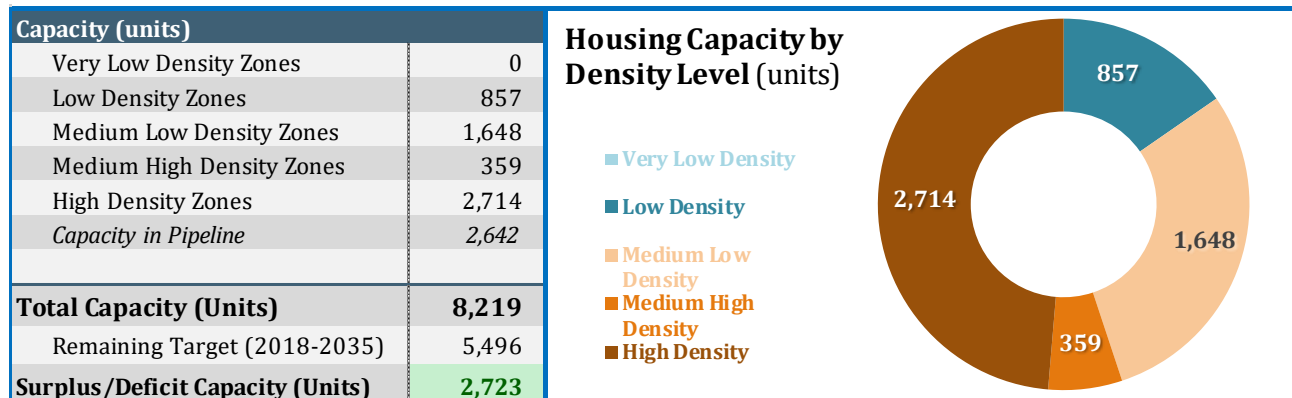


Permitted Units by Achieved Density Level, 2012-2018

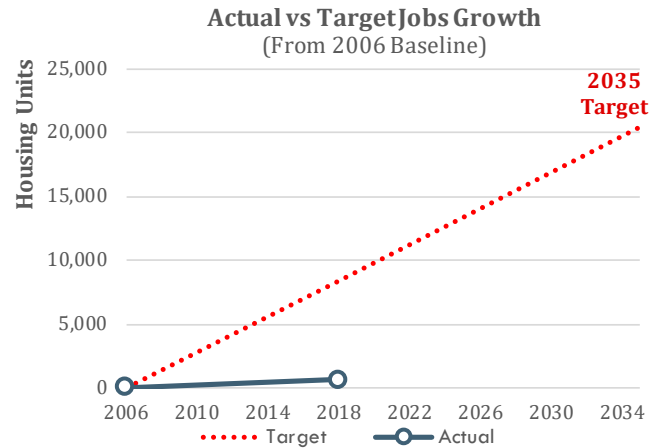


Tukwila - Residential Land Supply and Capacity

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	388.64	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	0.0% - 10.0%	8.92	61.7 / 61.7	271
	Redev Subtotal				13.82	0.0% - 10.0%	89.84	61.7 / 61.7	2,443
	Subtotal	155.60	28.98	0.00	15.19		98.76		2,714
All Zones	Vacant Total				18.51		119.81		1,632
	Redev Total				52.53		357.22		3,945
	Total	1,203.45	349.89	14.74	71.04		477.03		5,577



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

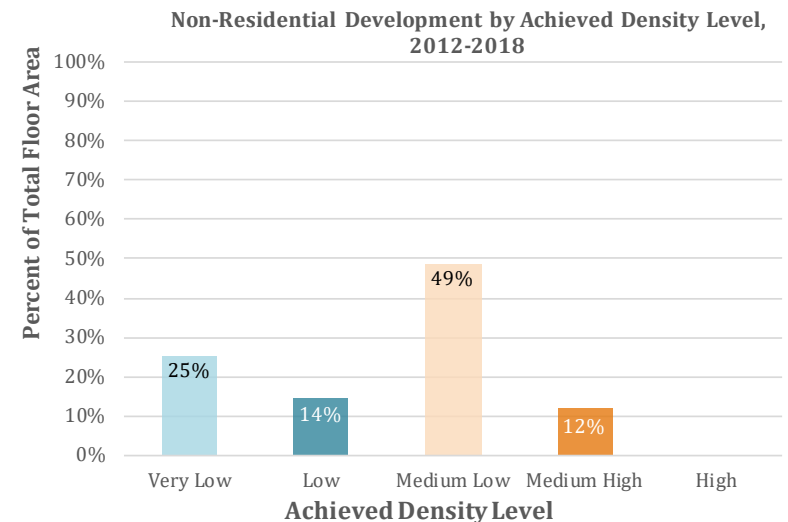
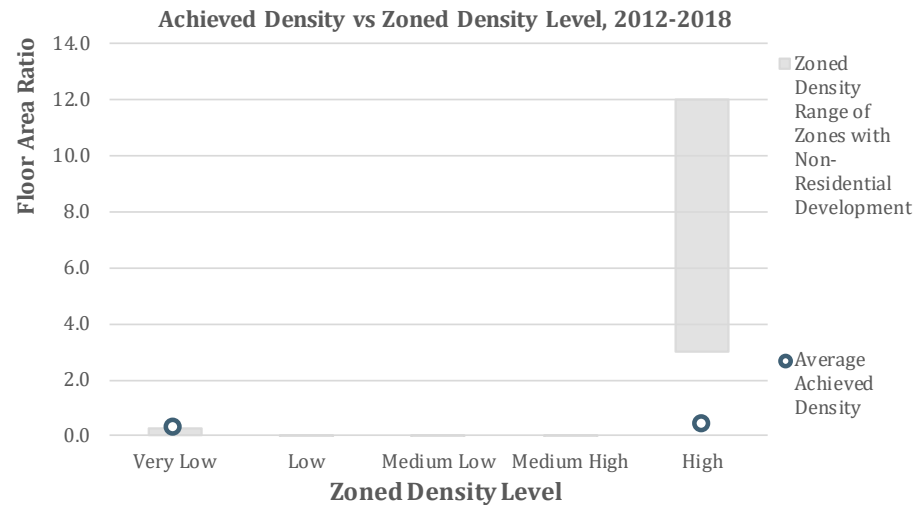
% of Pace Needed to Achieve 2035 Jobs Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Rate Needed to Meet 2035 Target
7.4%	0.12%	2.16%

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 2.2% 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	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



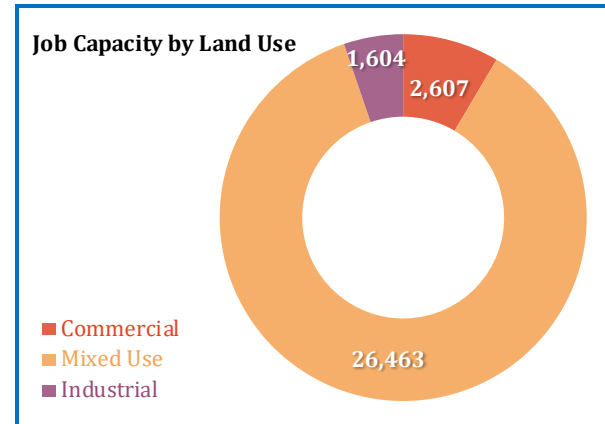
Tukwila - Commercial/Industrial Land Supply and Job Capacity

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	399.4	48.8	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	915.8	309.3	12.1	60.7	533.8		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 / 1.75	0.00	8.67	400	21,679
Redevelopable	5.69	0.06 / 1.75	1.53	1.91	400	4,784
Mixed Use Total	11.16	0.06 / 1.75	1.53	10.59	400	26,463
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 / 1.75	0.91	10.59	400	26,463
Industrial	3.68	0.42	0.26	1.28	800	1,604
<i>Job Capacity in Pipeline</i>						<i>3,074</i>
City Total	19.26	0.06 / 1.75	1.86	13.15	400 / 800	33,749

*Certain zones grouped as commercial allow for industrial use.

Job Capacity by Assumed Density Level	#	%
Very Low Density	309	1%
Low Density	2,195	7%
Medium Low Density	5,954	19%
Medium High Density	22,216	72%
High Density	0	0%
<i>Capacity in Pipeline</i>		<i>3,074</i>
Total Capacity (jobs)		33,749
Remaining Target (2018-2035)		19,737
Surplus/Deficit Capacity (jobs)		14,012



High Capacity Transit Communities

City of Des Moines

City of Kenmore

City of Lake Forest Park

City of Mercer Island

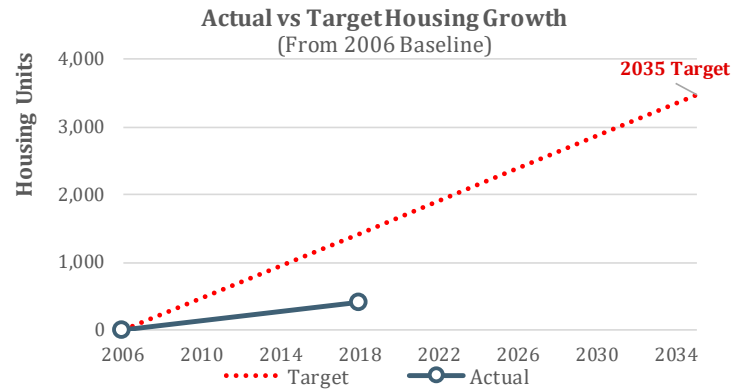
City of Newcastle

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	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Needed to Meet 2035 Target
28.7%	0.28%	1.28%

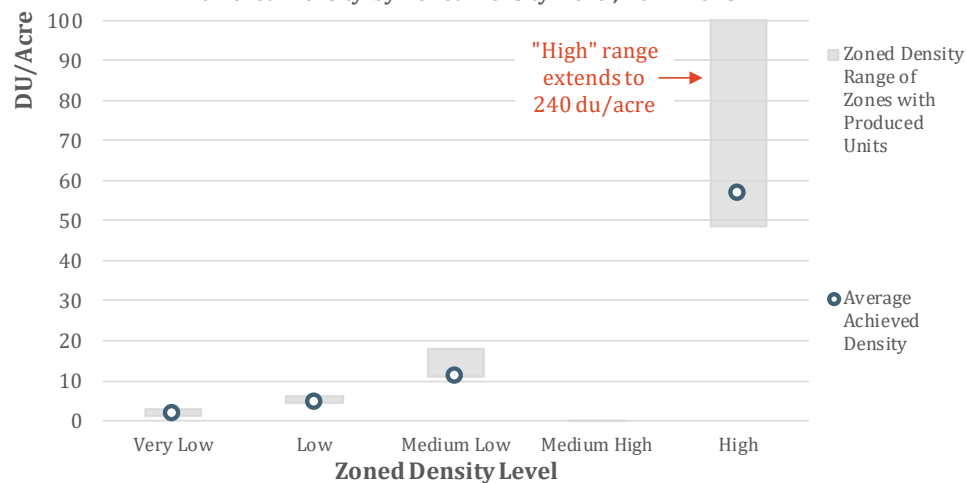
Since 2006, Des Moines has grown at 29% of the pace needed to achieve its 2035 housing growth target of 3,480 units. During this period, the total number of housing units in Des Moines grew by roughly 3%. At this current rate, Des Moines is under the production pace needed to meet its 2035 growth target, and needs to grow at an annual rate of 1.3% to reach its remaining target by 2035.

Residential Achieved Densities

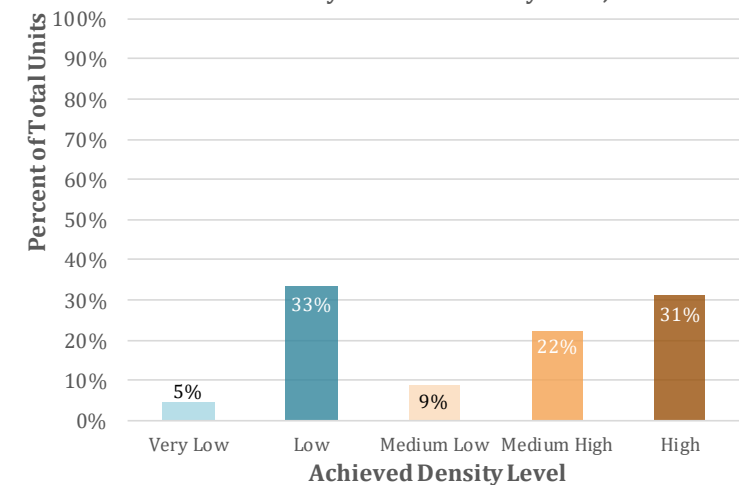
Zoned Density (du/acre)		Gross Area (acres)	Critical Areas (acres)	Public Purpose (acres)	ROWs (acres)	Net Area (acres)	Total Units	Achieved Density (DU/acre)
Very Low	0 - 4 du/acre	2.4	1.1	0.0	0.0	1.3	2	1.5
Low	4 - 10 du/acre	36.0	0.9	3.9	0.2	31.0	138	4.4
Medium Low	10 - 24 du/acre	4.3	0.3	0.0	0.1	3.9	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

Achieved Density by Zoned Density Level, 2012-2018



Permitted Units by Achieved Density Level, 2012-2018



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

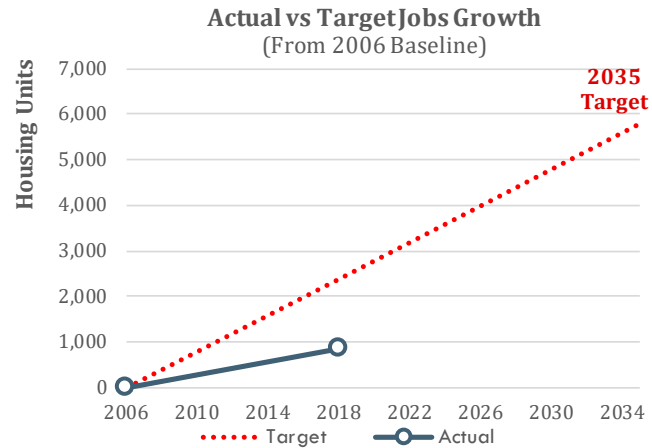
Housing Capacity by Density Level (units)

- Very Low Density
- Low Density
- Medium Low Density
- Medium High Density
- High Density

A donut chart illustrating the distribution of housing capacity across five density levels. The chart is divided into five segments of varying shades of brown and tan. The largest segment, representing High Density, accounts for 6,072 units. The Medium High Density segment follows with 1,550 units. The Low Density segment represents 220 units, the Medium Low Density segment represents 41 units, and the Very Low Density segment represents the smallest portion at 46 units.

Density Level	Capacity (units)
Very Low Density	46
Low Density	220
Medium Low Density	41
Medium High Density	1,550
High Density	6,072

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

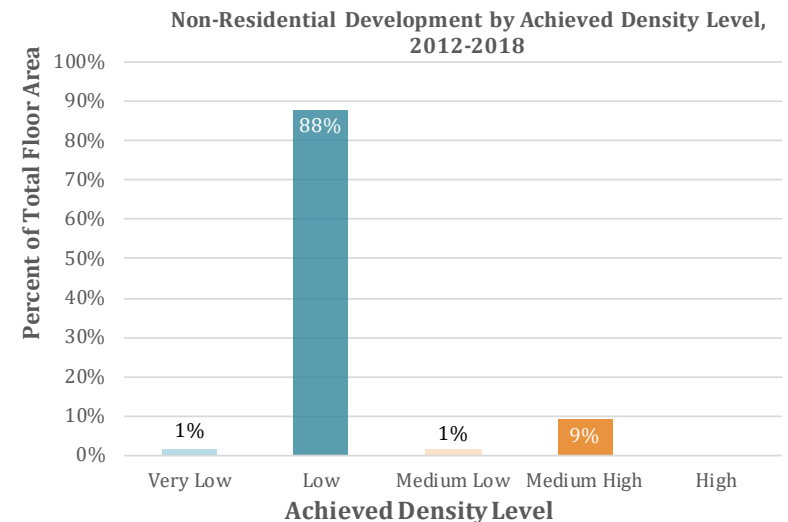
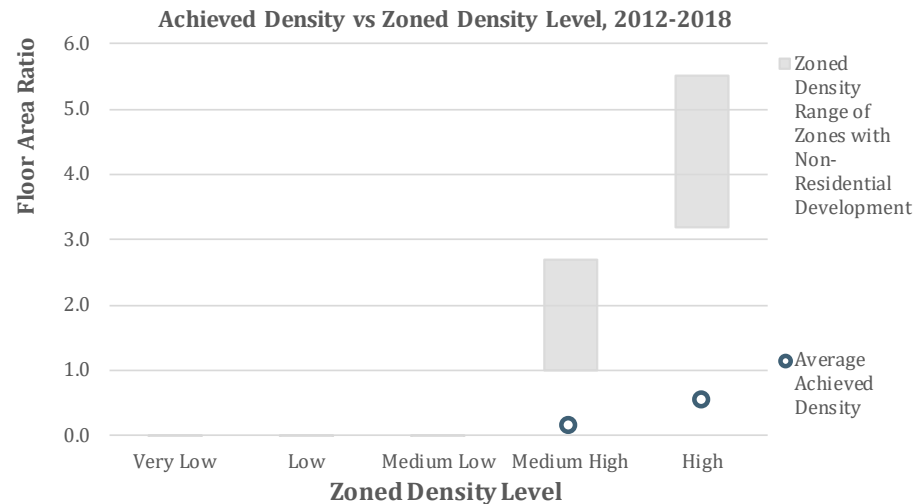
% of Pace Needed to Achieve 2035 Jobs Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Rate Needed to Meet 2035 Target
35.8%	1.09%	3.17%

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 3.2% 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	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



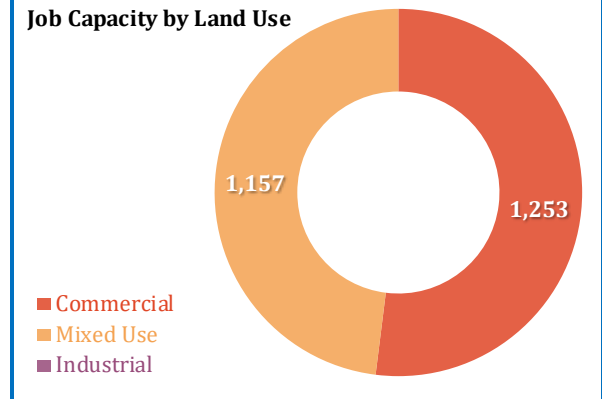
Des Moines - Commercial/Industrial Land Supply and Job Capacity

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	0.41	400 / 800	911
Mixed Use Total	4.64	0.01 / 0.63	1.51	0.51	400 / 800	1,157
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	0.51	400 / 800	1,157
Industrial	0.00	0.00	0.26	0.00	0	0
<i>Job Capacity in Pipeline</i>						<i>0</i>
City Total	6.87	3.50	1.86	1.23	0 / 800	2,410

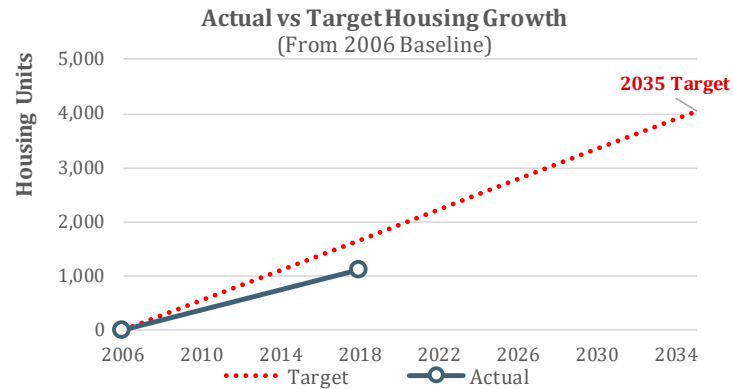
Job Capacity by Assumed Density Level	#	%
Very Low Density	1,303	54%
Low Density	0	0%
Medium Low Density	823	34%
Medium High Density	160	7%
High Density	124	5%
<i>Capacity in Pipeline</i>		<i>0</i>
Total Capacity (jobs)		2,410
Remaining Target (2018-2035)		4,941
Surplus/Deficit Capacity (jobs)		-2,531

Job Capacity by Land Use



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	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Needed to Meet 2035 Target
66.7%	1.08%	1.63%

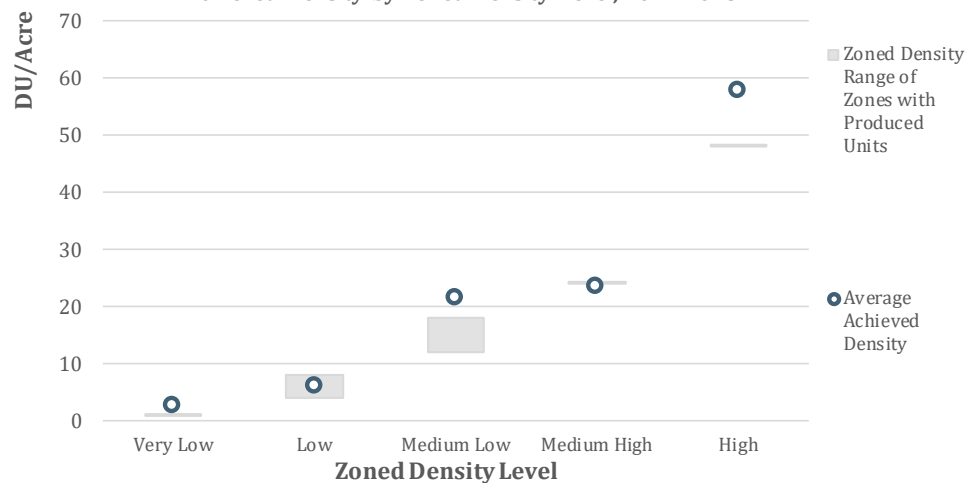
Since 2006, Kenmore has grown at 67% of the pace needed to achieve its 2035 housing growth target of 4,060 units. During this period, the total number of housing units in Kenmore grew by roughly 14%. At this current rate, Kenmore is under the production pace needed to meet its 2035 growth target, and needs to grow at an annual rate of 1.6% to reach its remaining target by 2035.

Residential Achieved Densities

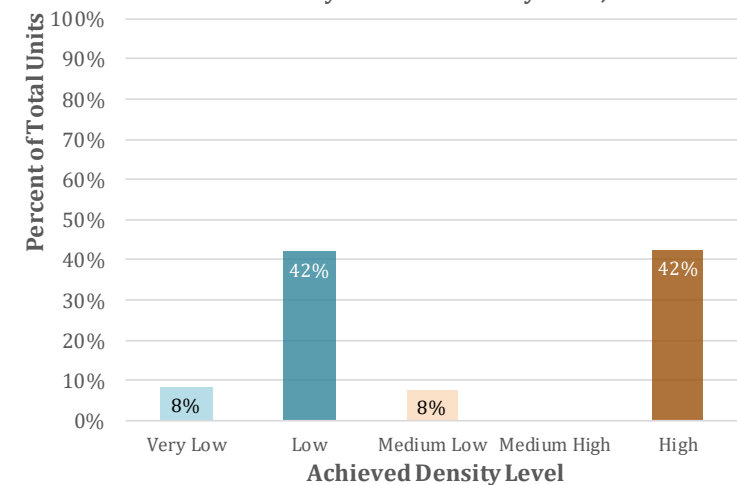
Zoned Density (du/acre)	Gross Area (acres)	Critical Areas (acres)	Public Purpose (acres)	ROWs (acres)	Net Area (acres)	Total Units	Achieved Density (DU/acre)
Very Low	0 - 4 du/acre	3.5	0.0	0.0	3.5	9	2.5
Low	4 - 10 du/acre	65.3	2.8	0.3	61.7	365	5.9
Medium Low	10 - 24 du/acre	5.6	4.2	0.1	1.4	29	21.4
Medium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

Achieved Density by Zoned Density Level, 2012-2018

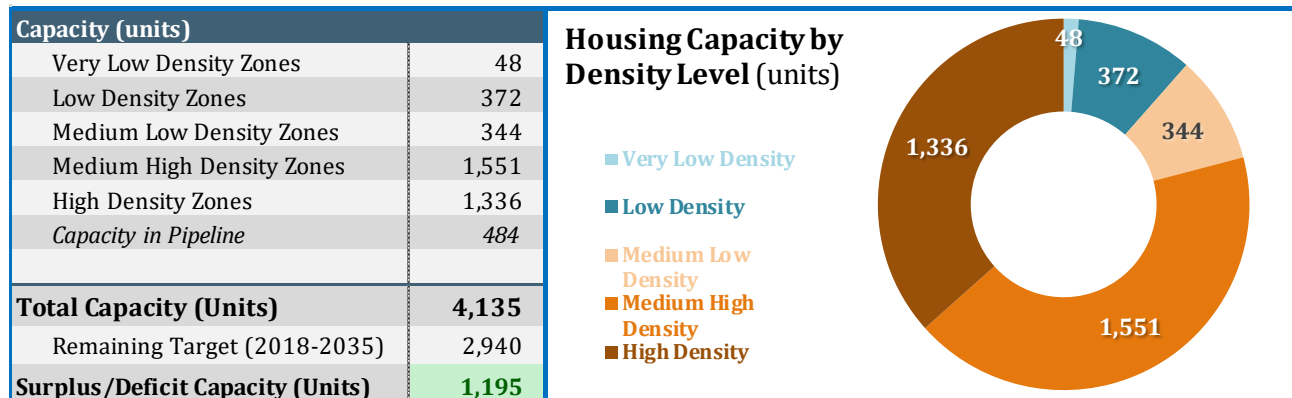


Permitted Units by Achieved Density Level, 2012-2018

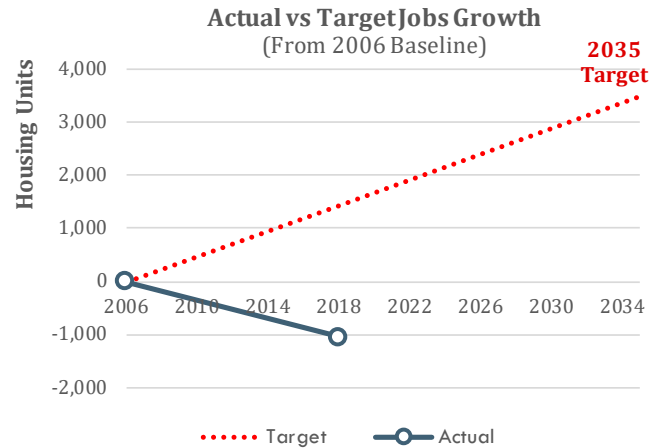


Kenmore - Residential Land Supply and Capacity

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				3.56	5.0% - 9.0%	15.04	2.5 / 3.5	47
	Redev Subtotal				3.48	0.0% - 9.0%	13.46	2.5 / 3.5	1
	Subtotal	151.92	114.06	0.00	7.05		28.50		48
Low Density	Vacant Subtotal				7.83	5.0% - 5.0%	22.03	6.7 / 8.0	149
	Redev Subtotal				21.56	5.0% - 5.0%	60.36	6.7 / 8.0	224
	Subtotal	218.79	101.13	0.00	29.39		82.39		372
Medium Low Density	Vacant Subtotal				1.36	5.0% - 5.0%	7.25	16.4 / 23.3	139
	Redev Subtotal				2.13	5.0% - 5.0%	11.36	16.4 / 23.3	205
	Subtotal	32.98	9.72	0.00	3.49		18.61		344
Medium High Density	Vacant Subtotal				0.14	5.0% - 5.0%	0.74	24.0	18
	Redev Subtotal				17.17	0.0% - 5.0%	51.59	24.0 / 31.0	1,533
	Subtotal	2.88	0.00	0.00	17.31		52.34		1,551
High Density	Vacant Subtotal				1.02	5.0% - 10.0%	5.33	48.0 / 72.0	266
	Redev Subtotal				3.80	5.0% - 10.0%	20.19	48.0 / 72.0	1,071
	Subtotal	116.09	12.21	0.00	4.82		25.51		1,336
All Zones	Vacant Total				13.91		50.39		618
	Redev Total				48.13		156.96		3,033
	Total	522.66	237.12	0.00	62.04		207.35		3,651



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	3,480

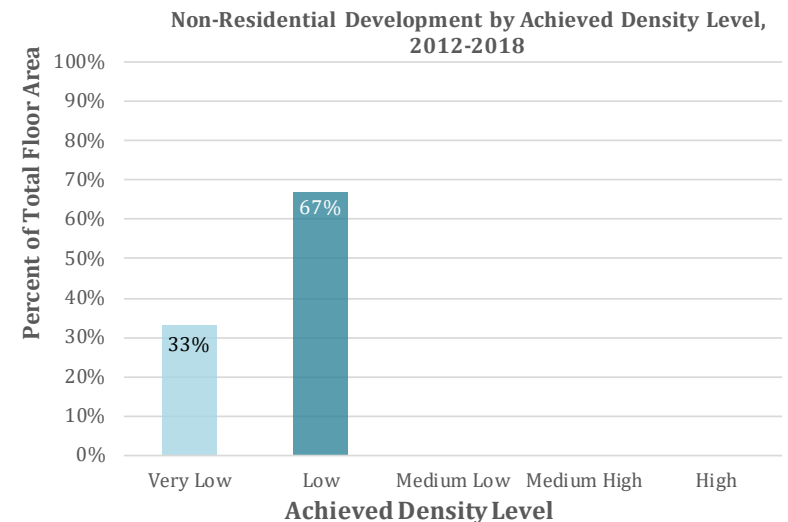
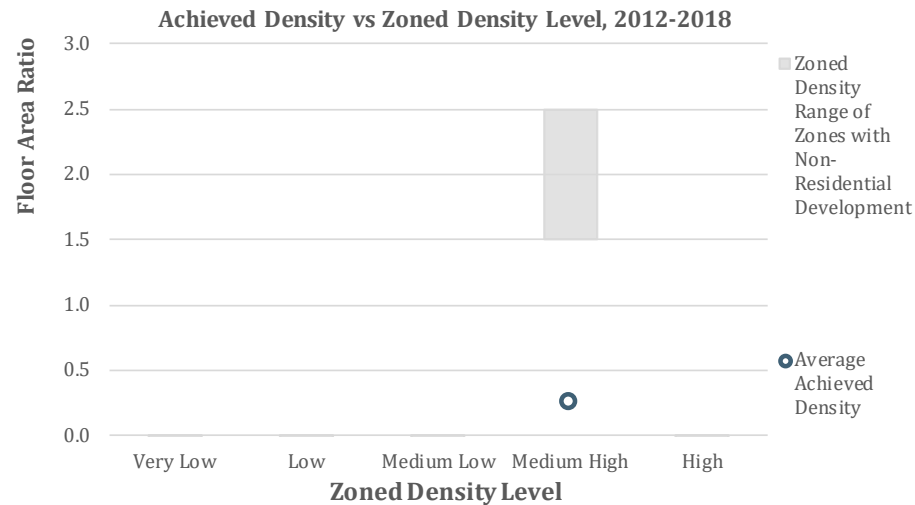
% of Pace Needed to Achieve 2035 Jobs Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Rate Needed to Meet 2035 Target
-72.9%	-1.92%	4.55%

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 4.6% 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



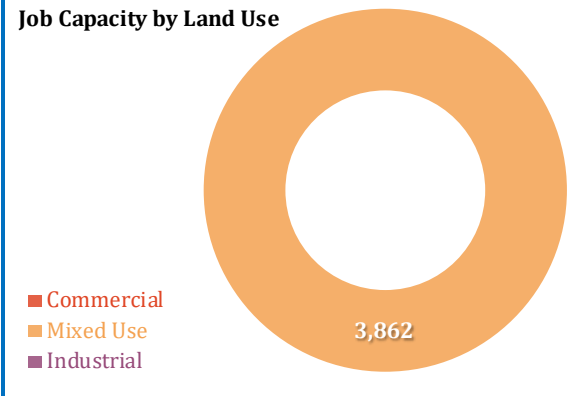
Kenmore - Commercial/Industrial Land Supply and Job Capacity

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	0.48	0.16 / 1.50	0.00	0.19	300 / 400	623
Redevelopable	3.33	0.16 / 1.50	0.26	0.97	300 / 400	3239
Mixed Use Total	3.81	0.16 / 1.50	0.26	1.16	300 / 400	3,862
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	3.81	0.16 / 1.50	0.91	1.16	300 / 400	3,862
Industrial	0.00	0.00	0.26	0.00	0	0
<i>Job Capacity in Pipeline</i>						19
City Total	3.81	1.50	1.86	1.16	0 / 400	3,881

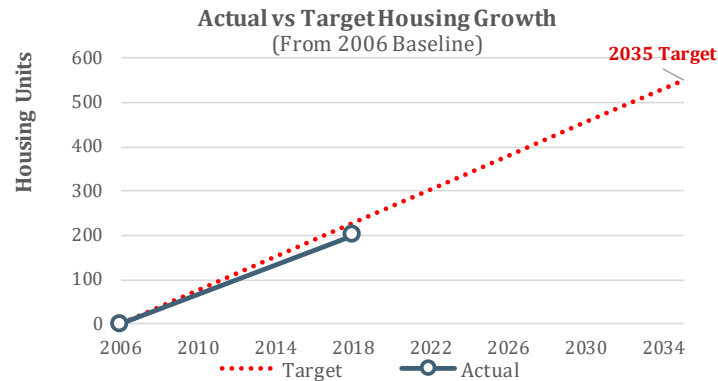
Job Capacity by Assumed Density Level	#	%
Very Low Density	295	8%
Low Density	3,518	91%
Medium Low Density	0	0%
Medium High Density	49	1%
High Density	0	0%
<i>Capacity in Pipeline</i>		19
Total Capacity (jobs)		3,881
Remaining Target (2018-2035)		4,530
Surplus/Deficit Capacity (jobs)		-649

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

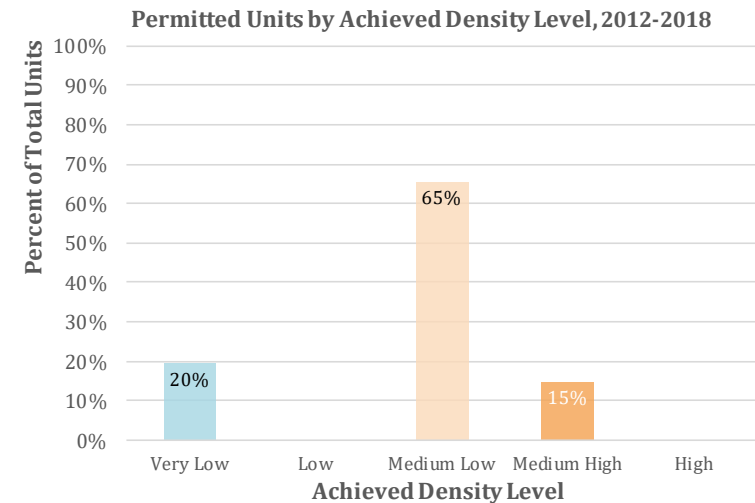
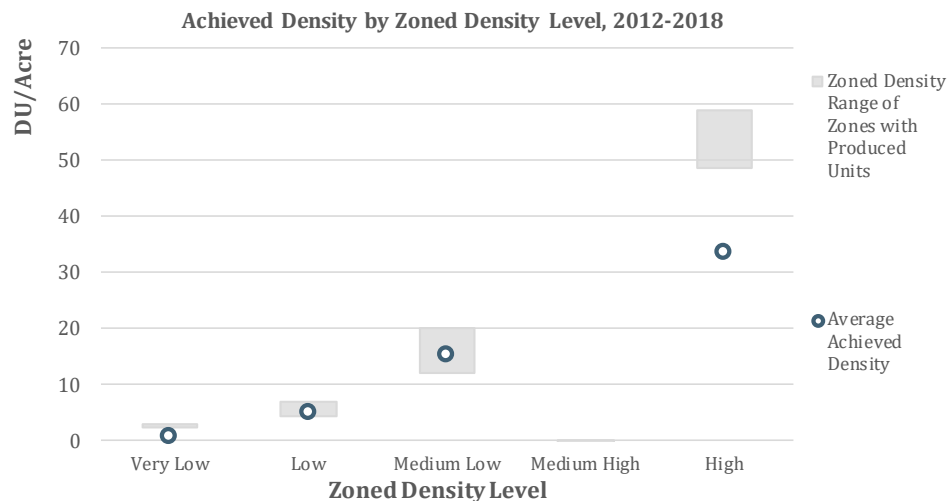
% of Pace Needed to Achieve 2035 Housing Growth Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Needed to Meet 2035 Target
88.2%	0.32%	0.37%

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

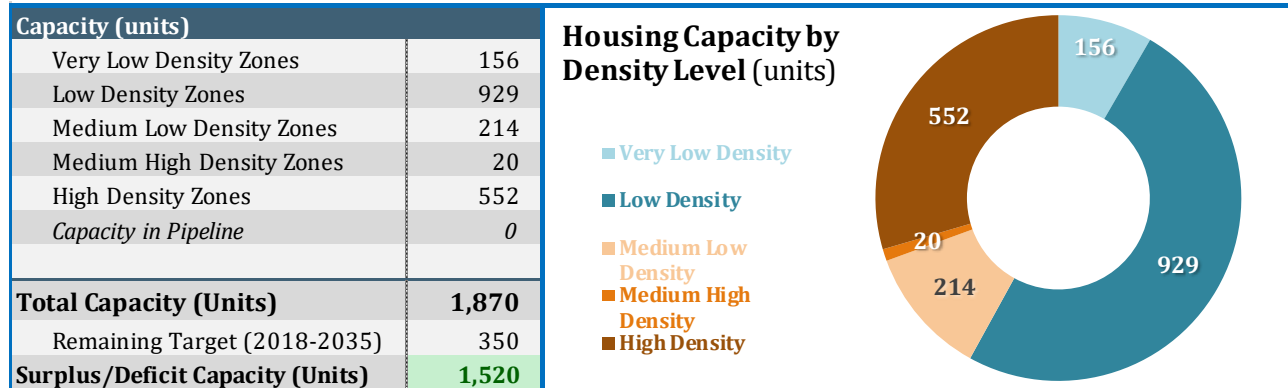
Zoned Density (du/acre)	Gross Area (acres)	Critical Areas (acres)	Public Purpose (acres)	ROWs (acres)	Net Area (acres)	Total Units	Achieved Density (DU/acre)
Very Low	0 - 4 du/acre	3.5	0.0	0.0	3.5	2	0.6
Low	4 - 10 du/acre	17.8	4.2	0.0	13.6	67	4.9
Medium Low	10 - 24 du/acre	5.1	0.0	0.1	5.1	77	15.2
Medium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

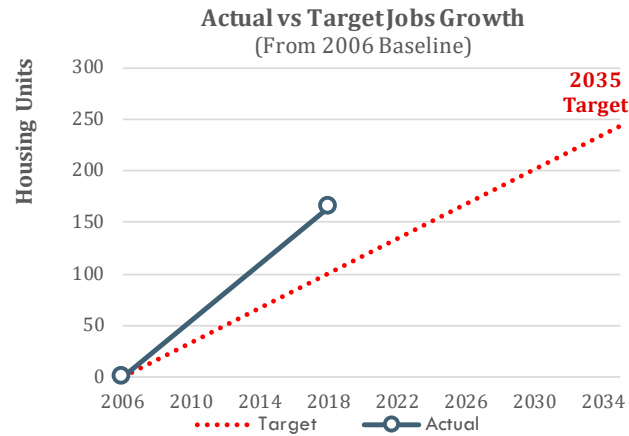


Lake Forest Park - Residential Land Supply and Capacity

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



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

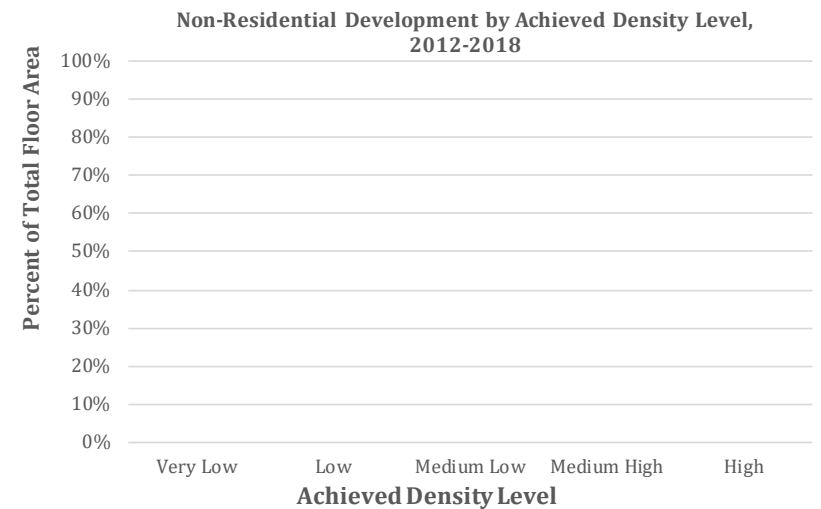
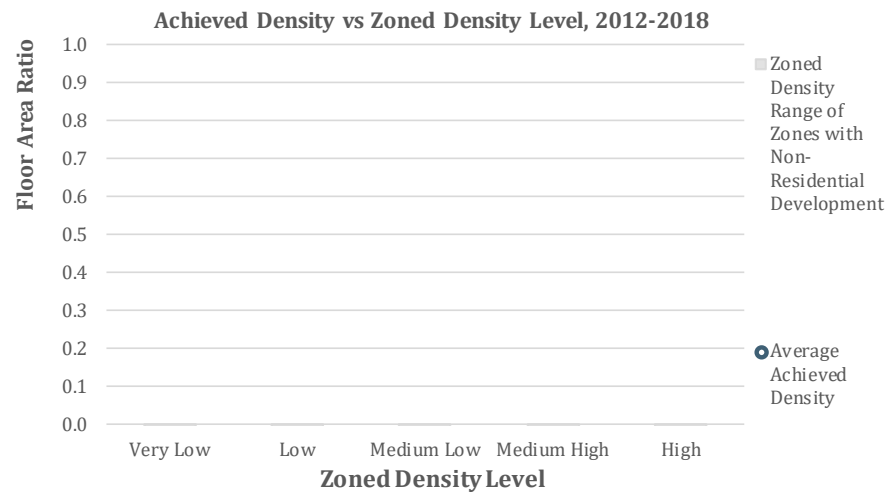
% of Pace Needed to Achieve 2035 Jobs Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Rate Needed to Meet 2035 Target
163.7%	0.82%	0.25%

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	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



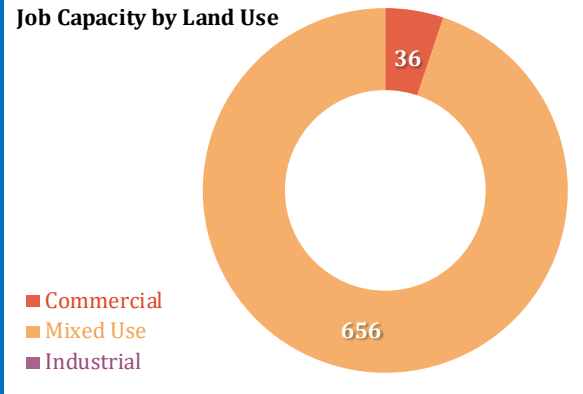
Lake Forest Park - Commercial/Industrial Land Supply and Job Capacity

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
<i>Job Capacity in Pipeline</i>						0
City Total	1.08	0.65	1.86	0.32	0 / 465	691

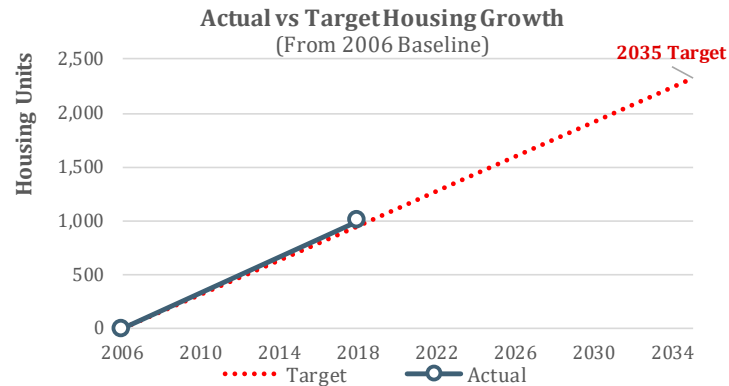
Job Capacity by Assumed Density Level	#	%
Very Low Density	0	0%
Low Density	0	0%
Medium Low Density	691	100%
Medium High Density	0	0%
High Density	0	0%
<i>Capacity in Pipeline</i>		0
Total Capacity (jobs)		691
Remaining Target (2018-2035)		79
Surplus/Deficit Capacity (jobs)		613

Job Capacity by Land Use



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	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Needed to Meet 2035 Target
104.8%	0.85%	0.70%

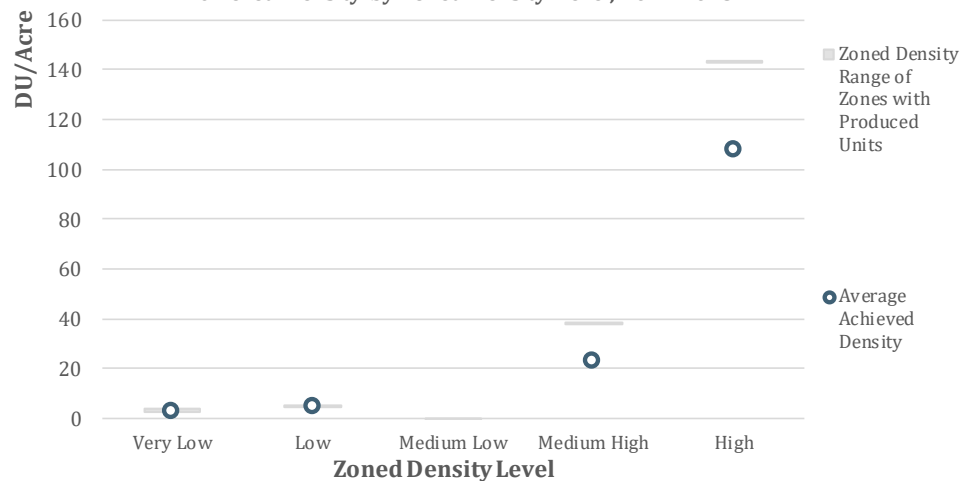
Since 2006, Mercer Island has grown at 105% of the pace needed to achieve its 2035 housing growth target of 2,320 units. During this period, the total number of housing units in Mercer Island grew by roughly 11%. At this current rate, Mercer Island is over the production pace needed to meet its 2035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

Residential Achieved Densities

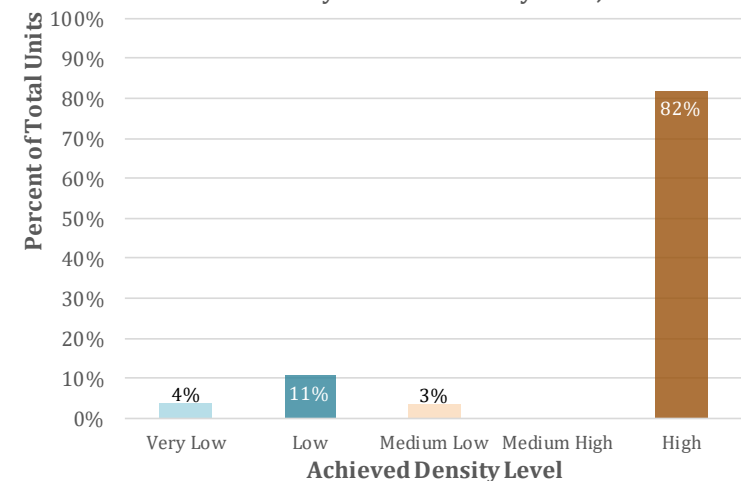
Zoned Density (du/acre)	Gross Area (acres)	Critical Areas (acres)	Public Purpose (acres)	ROWs (acres)	Net Area (acres)	Total Units	Achieved Density (DU/acre)
Very Low	0 - 4 du/acre	12.2	2.2	1.7	0.0	8.3	22
Low	4 - 10 du/acre	16.0	0.7	2.4	0.0	13.0	60
Medium Low	10 - 24 du/acre	0.0	0.0	0.0	0.0	0.0	0
Medium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

Achieved Density by Zoned Density Level, 2012-2018

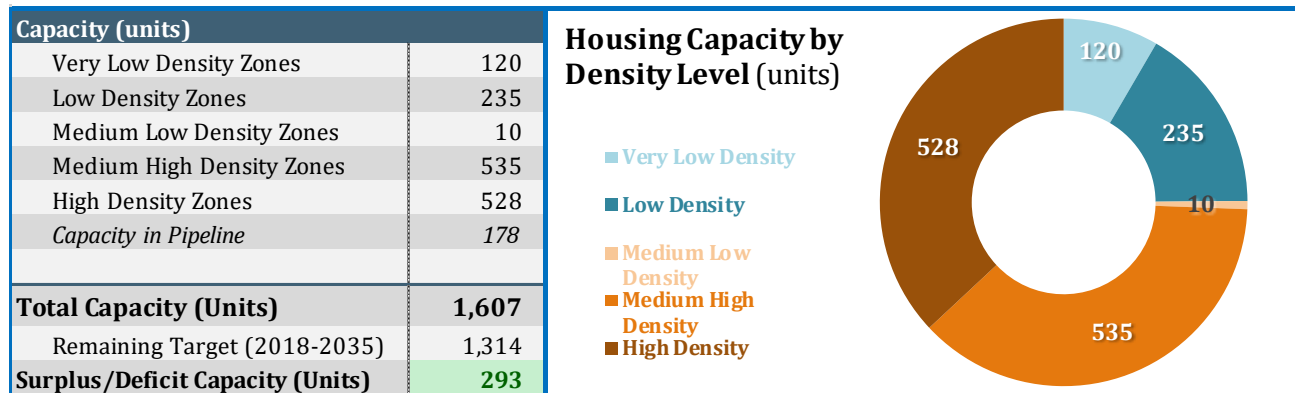


Permitted Units by Achieved Density Level, 2012-2018

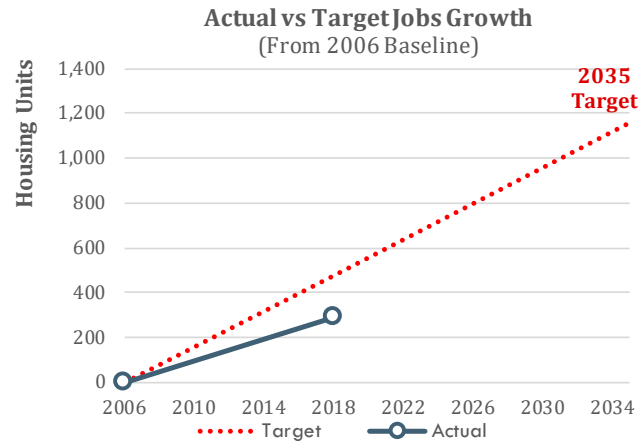


Mercer Island - Residential Land Supply and Capacity

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



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

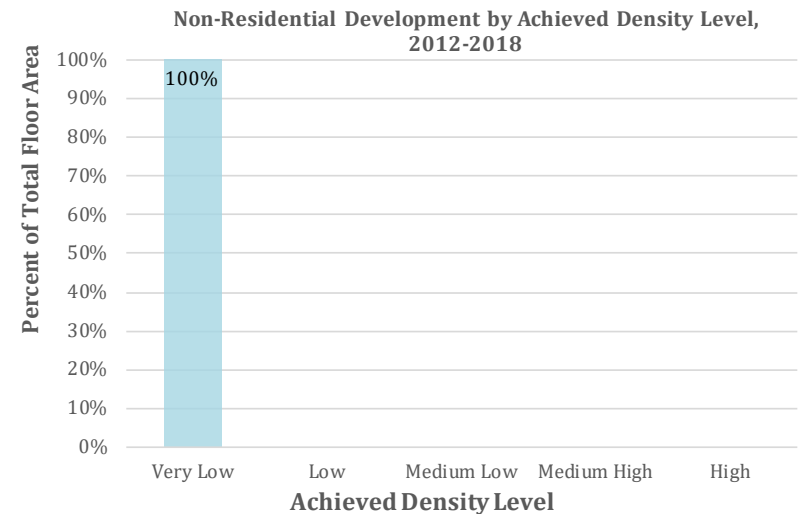
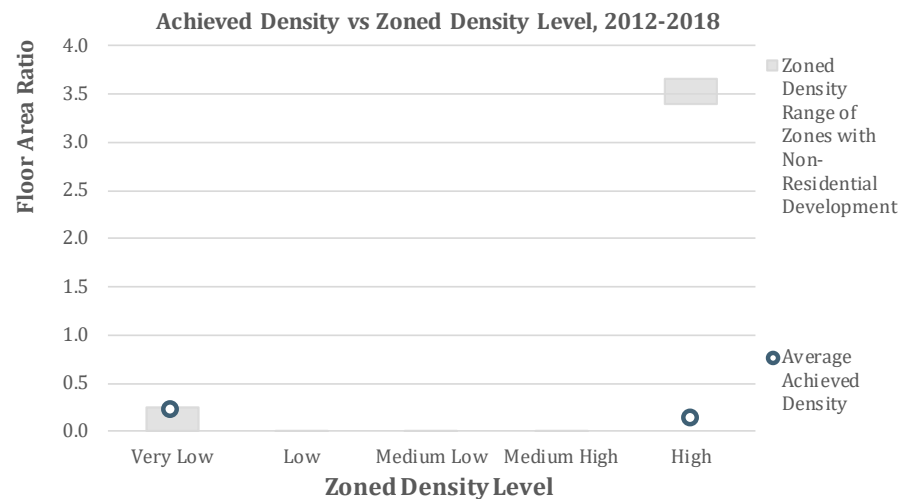
% of Pace Needed to Achieve 2035 Jobs Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Rate Needed to Meet 2035 Target
60.8%	0.32%	0.63%

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 0.6% 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	364,525	77,277
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
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



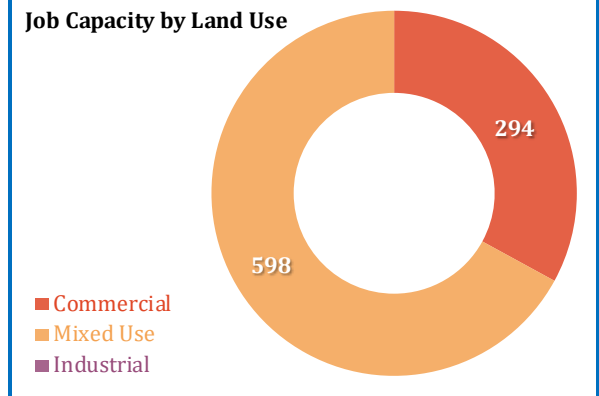
Mercer Island - Commercial/Industrial Land Supply and Job Capacity

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
<i>Job Capacity in Pipeline</i>						70
City Total	1.36	1.00	1.86	0.18	0 / 200	961

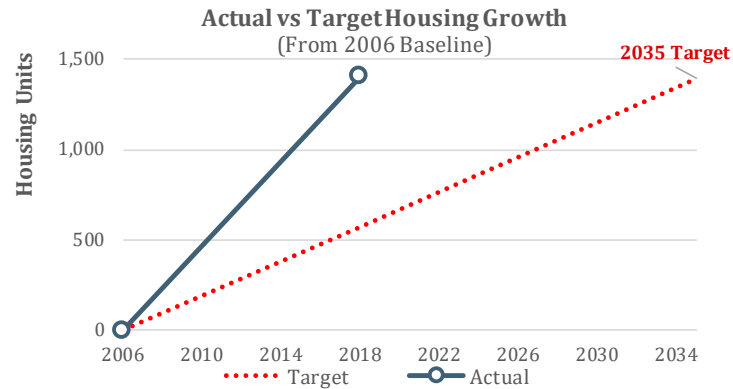
Job Capacity by Assumed Density Level	#	%
Very Low Density	11	1%
Low Density	177	20%
Medium Low Density	227	25%
Medium High Density	477	54%
High Density	0	0%
<i>Capacity in Pipeline</i>		70
Total Capacity (jobs)		961
Remaining Target (2018-2035)		868
Surplus/Deficit Capacity (jobs)		93

Job Capacity by Land Use



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	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Needed to Meet 2035 Target
243.8%	2.67%	Met Target

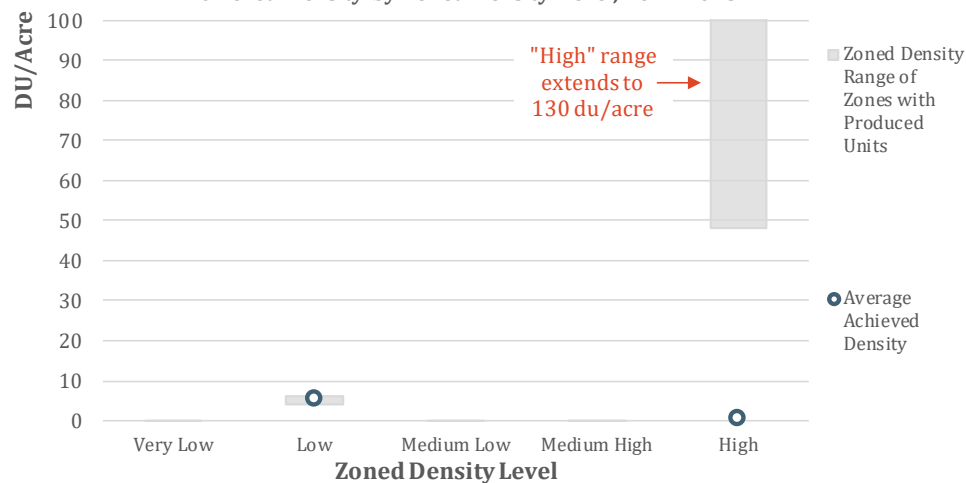
Since 2006, Newcastle has grown at 244% of the pace needed to achieve its 2035 housing growth target of 1,392 units. During this period, the total number of housing units in Newcastle grew by roughly 37%. Newcastle has achieved its 2035 housing growth target.

Residential Achieved Densities

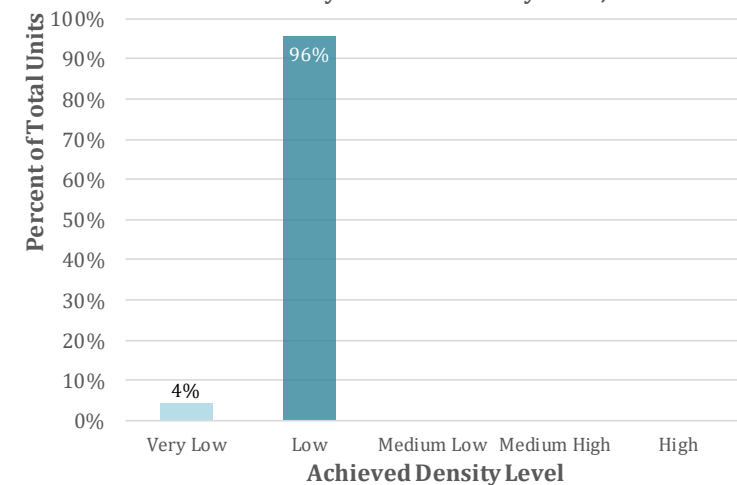
Zoned Density (du/acre)	Gross Area (acres)	Critical Areas (acres)	Public Purpose (acres)	ROWs (acres)	Net Area (acres)	Total Units	Achieved Density (DU/acre)
Very Low	0 - 4 du/acre	0.0	0.0	0.0	0.0	0	
Low	4 - 10 du/acre	77.0	18.7	11.5	42.6	223	5.2
Medium Low	10 - 24 du/acre	0.0	0.0	0.0	0.0	0	
Medium High	24 - 48 du/acre	0.0	0.0	0.0	0.0	0	
High	48 & up du/acre	57.9	13.6	1.0	5.4	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

Achieved Density by Zoned Density Level, 2012-2018

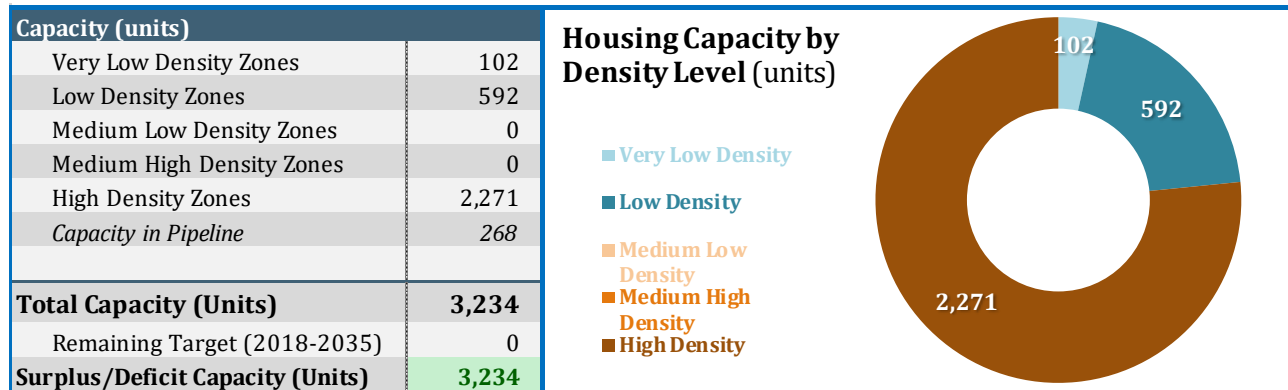


Permitted Units by Achieved Density Level, 2012-2018

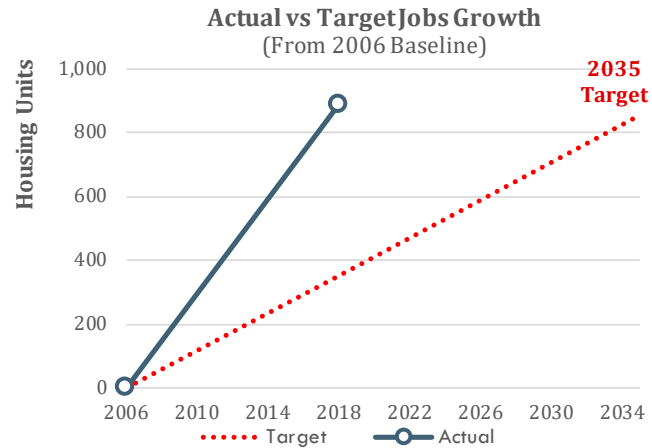


Newcastle - Residential Land Supply and Capacity

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



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

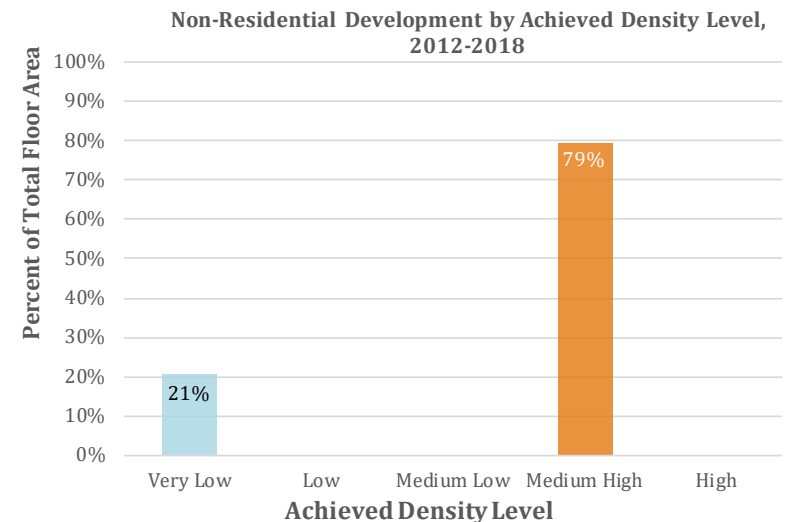
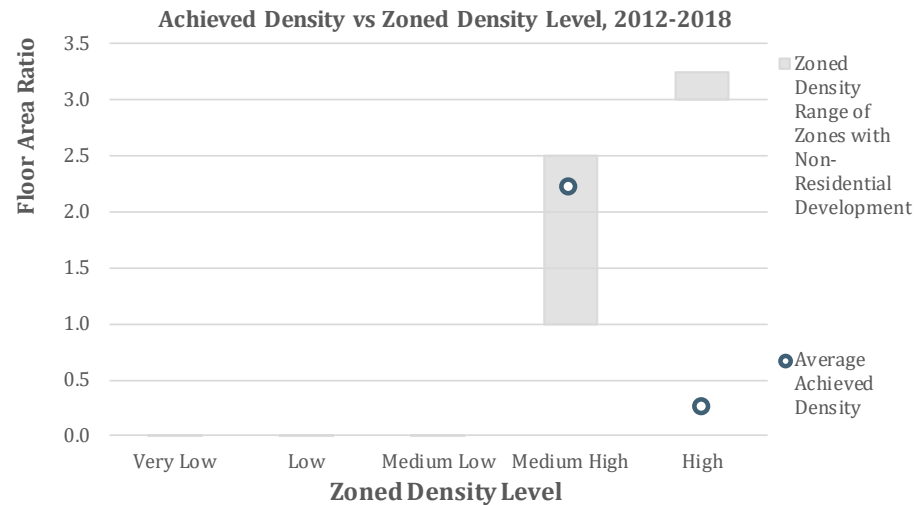
% of Pace Needed to Achieve 2035 Jobs Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Rate Needed to Meet 2035 Target
252.6%	3.51%	Met Target

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



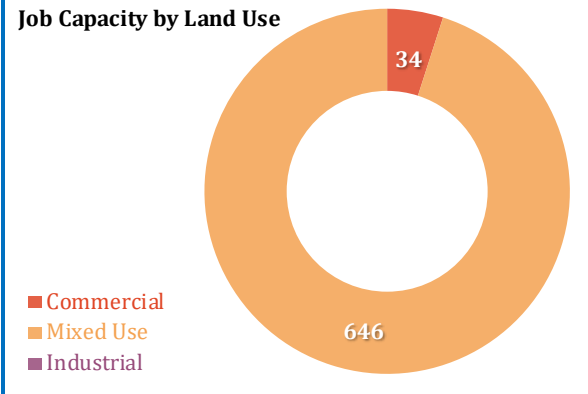
Newcastle - Commercial/Industrial Land Supply and Job Capacity

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
<i>Job Capacity in Pipeline</i>						0
City Total	2.08	0.30	1.86	0.20	0 / 300	680

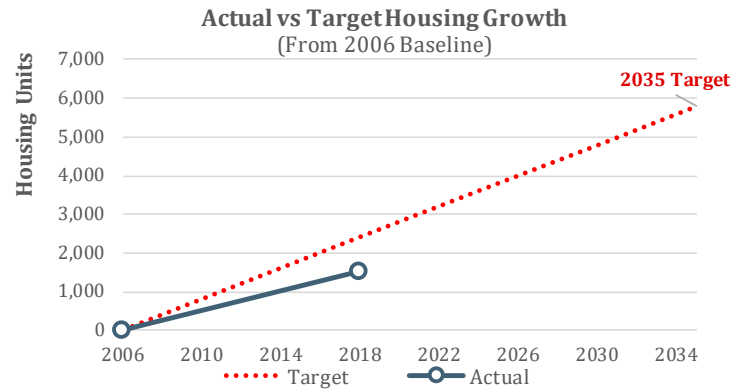
Job Capacity by Assumed Density Level	#	%
Very Low Density	680	100%
Low Density	0	0%
Medium Low Density	0	0%
Medium High Density	0	0%
High Density	0	0%
<i>Capacity in Pipeline</i>		0
Total Capacity (jobs)		680
Remaining Target (2018-2035)		0
Surplus/Deficit Capacity (jobs)		680

Job Capacity by Land Use



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	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Needed to Meet 2035 Target
63.7%	0.56%	0.98%

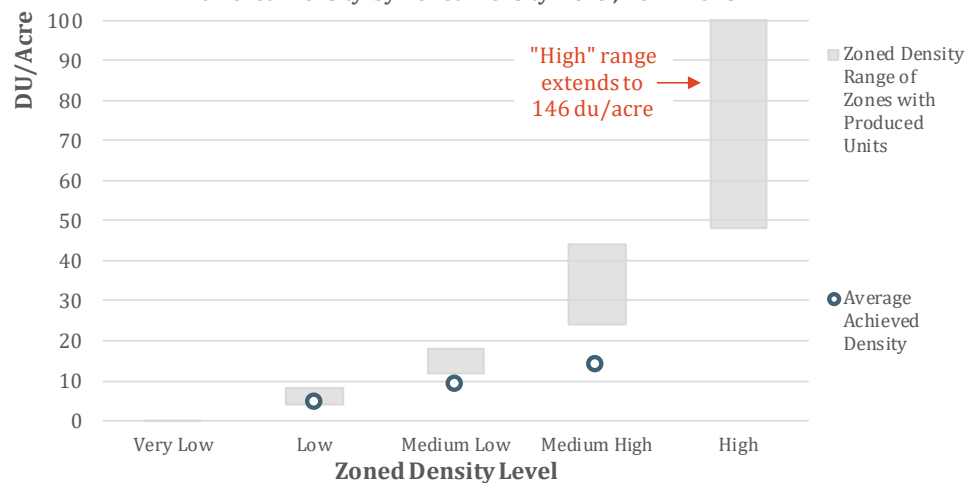
Since 2006, Shoreline has grown at 64% of the pace needed to achieve its 2035 housing growth target of 5,800 units. During this period, the total number of housing units in Shoreline grew by roughly 7%. At this current rate, Shoreline is under the production pace needed to meet its 2035 growth target, and needs to grow at an annual rate of 1% to reach its remaining target by 2035.

Residential Achieved Densities

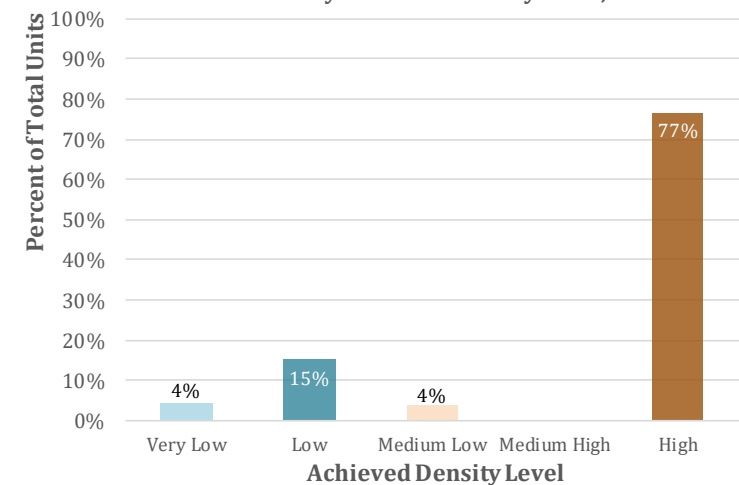
Zoned Density (du/acre)	Gross Area (acres)	Critical Areas (acres)	Public Purpose (acres)	ROWs (acres)	Net Area (acres)	Total Units	Achieved Density (DU/acre)
Very Low	0 - 4 du/acre	0.0	0.0	0.0	0.0	0	
Low	4 - 10 du/acre	94.1	10.6	0.0	83.5	360	4.3
Medium Low	10 - 24 du/acre	4.5	0.0	0.0	4.5	41	9.1
Medium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

Achieved Density by Zoned Density Level, 2012-2018

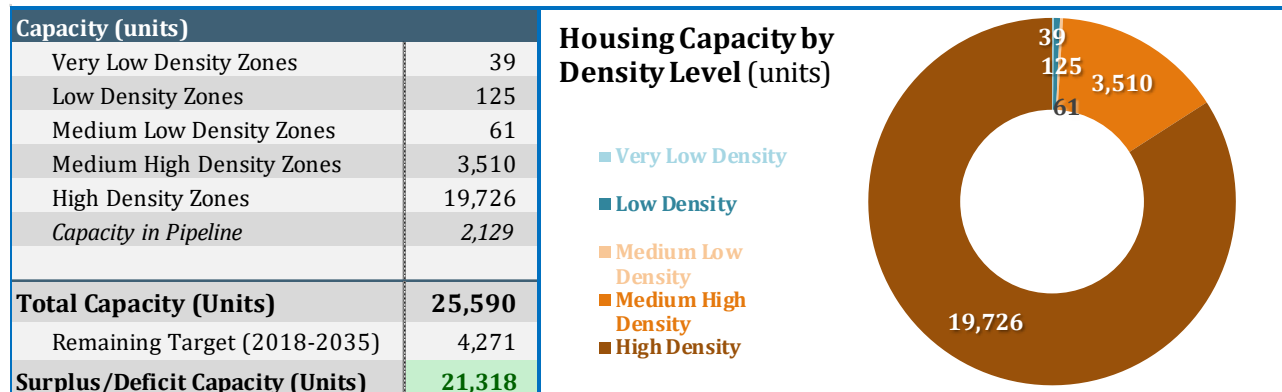


Permitted Units by Achieved Density Level, 2012-2018

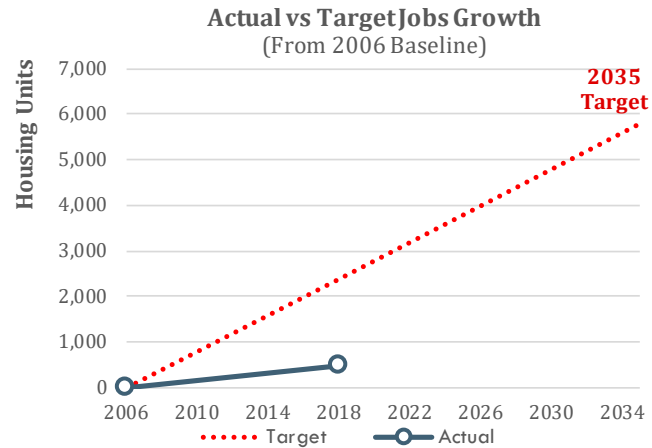


Shoreline - Residential Land Supply and Capacity

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%	0.76	3.7	1
	Redev Subtotal				0.00	0.0% - 10.0%	45.28	3.7	37
	Subtotal	58.48	7.37	0.00	0.00		46.04		39
Low Density	Vacant Subtotal				0.00	10.0% - 10.0%	24.11	5.1 / 9.6	125
	Redev Subtotal				0.00	10.0% - 10.0%	94.64	5.1 / 9.6	0
	Subtotal	142.68	10.74	0.00	0.00		118.74		125
Medium Low Density	Vacant Subtotal				0.00	10.0% - 20.0%	0.13	11.9 / 12.0	2
	Redev Subtotal				0.00	10.0% - 20.0%	10.22	11.9 / 12.0	59
	Subtotal	11.78	0.21	0.00	0.00		10.35		61
Medium High Density	Vacant Subtotal				0.00	20.0% - 30.0%	1.03	25.0 / 44.0	36
	Redev Subtotal				0.00	20.0% - 30.0%	98.77	25.0 / 44.0	3,474
	Subtotal	141.68	0.50	0.00	0.00		99.80		3,510
High Density	Vacant Subtotal				0.00	20.0% - 30.0%	22.06	102.8 / 150.4	2,916
	Redev Subtotal				0.00	20.0% - 30.0%	132.57	102.8 / 150.4	16,810
	Subtotal	203.39	0.02	0.00	0.00		154.63		19,726
All Zones	Vacant Total				0.00		48.08		3,080
	Redev Total				0.00		381.47		20,381
	Total	558.01	18.84	0.00	0.00		429.55		23,461



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

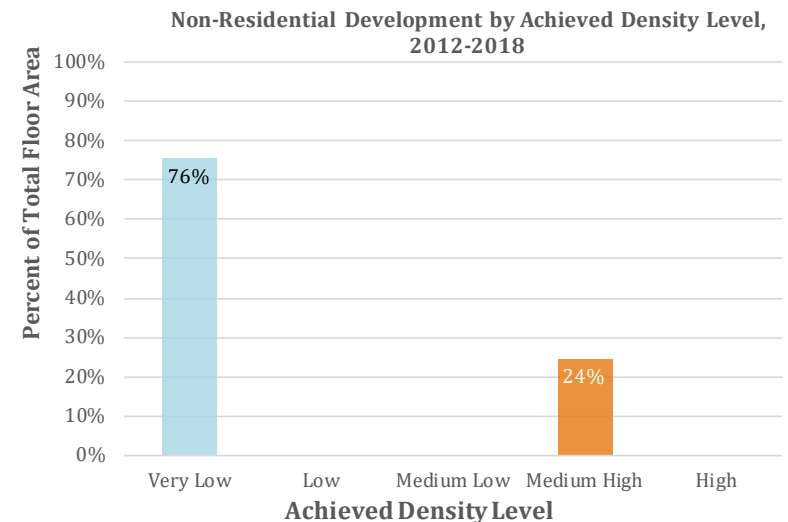
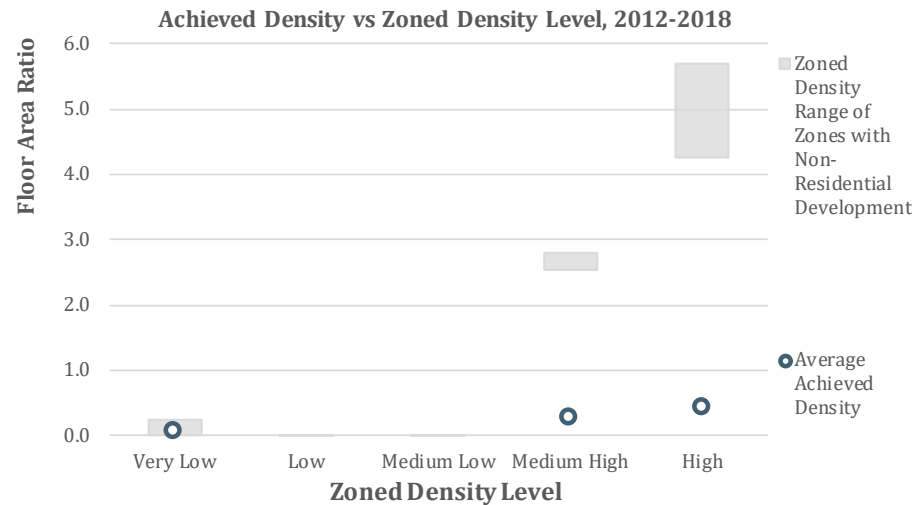
% of Pace Needed to Achieve 2035 Jobs Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Rate Needed to Meet 2035 Target
20.3%	0.23%	1.54%

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 1.5% 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	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



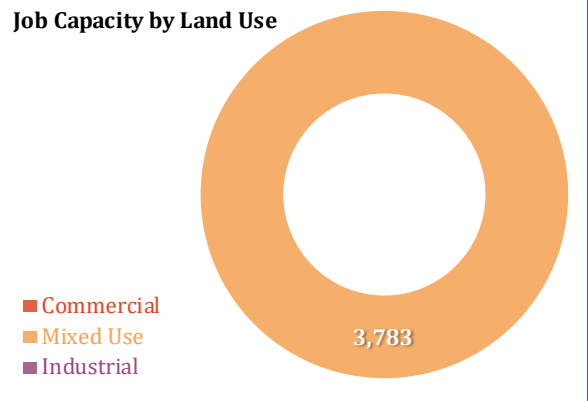
Shoreline - Commercial/Industrial Land Supply and Job Capacity

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	345.1	0.5	0.0	0.0	344.5	20% - 30%	254.4
Industrial	0.0	0.0	0.0	0.0	0.0	0%	0.0
Non-Res Land Total	345.1	0.5	0.0	0.0	344.5		254.4

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	1.01	0.10 / 0.50	0.00	0.42	500	835
Redevelopable	10.08	0.10 / 0.50	2.08	1.47	500	2,948
Mixed Use Total	11.08	0.10 / 0.50	2.08	1.89	500	3,783
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	11.08	0.10 / 0.50	0.91	1.89	500	3,783
Industrial	0.00	0.00	0.26	0.00	0	0
<i>Job Capacity in Pipeline</i>						<i>170</i>
City Total	11.08	0.50	1.86	1.89	0 / 500	3,953

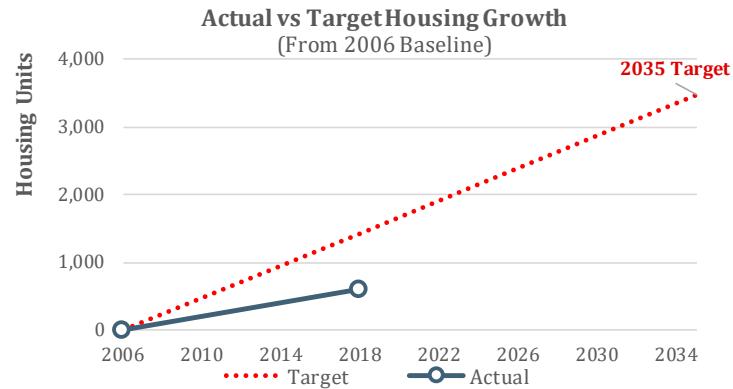
Job Capacity by Assumed Density Level	#	%
Very Low Density	2,939	78%
Low Density	0	0%
Medium Low Density	844	22%
Medium High Density	0	0%
High Density	0	0%
<i>Capacity in Pipeline</i>		<i>170</i>
Total Capacity (jobs)		3,953
Remaining Target (2018-2035)		5,313
Surplus/Deficit Capacity (jobs)		-1,360

Job Capacity by Land Use



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

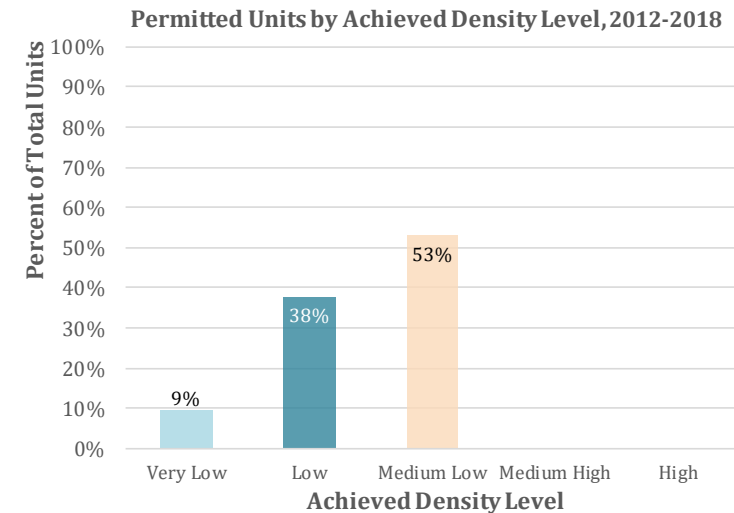
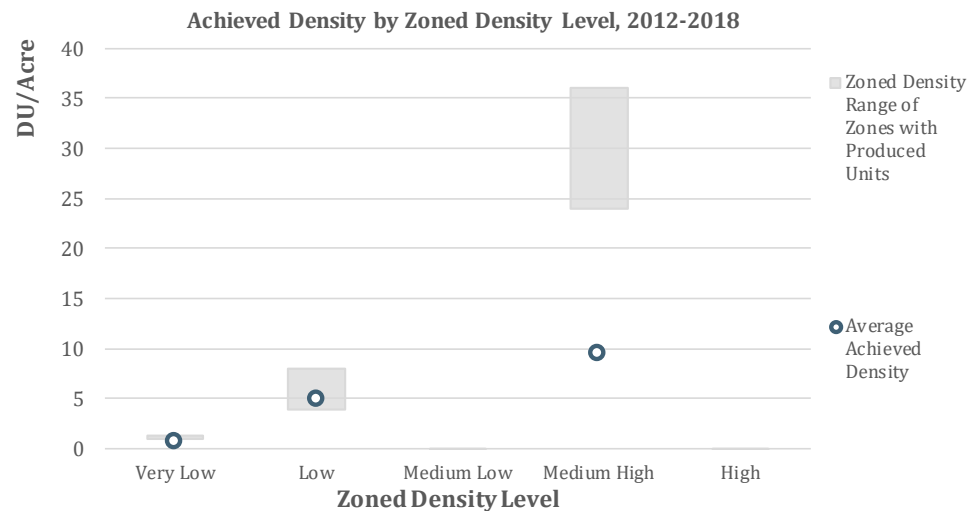
% of Pace Needed to Achieve 2035 Housing Growth Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Needed to Meet 2035 Target
42.0%	1.04%	2.64%

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 2.6% to reach its remaining target by 2035.

Residential Achieved Densities

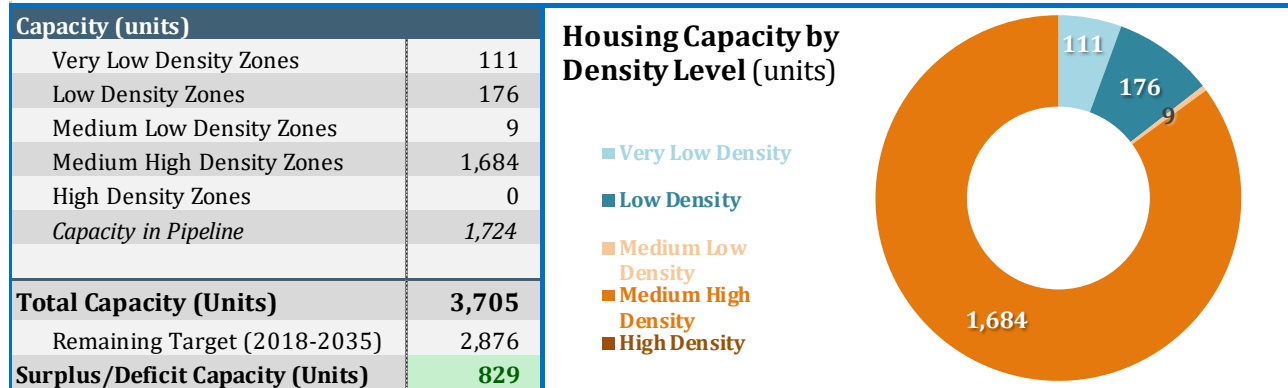
Zoned Density (du/acre)		Gross Area (acres)	Critical Areas (acres)	Public Purpose (acres)	ROWs (acres)	Net Area (acres)	Total Units	Achieved Density (DU/acre)
Very Low	0 - 4 du/acre	57.6	1.1	0.0	0.1	56.3	40	0.7
Low	4 - 10 du/acre	35.2	0.0	0.0	0.0	35.2	171	4.9
Medium Low	10 - 24 du/acre	0.0	0.0	0.0	0.0	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

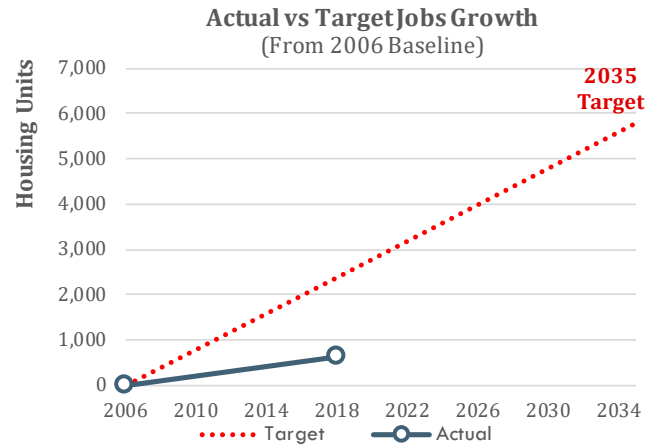


Woodinville - Residential Land Supply and Capacity

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



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

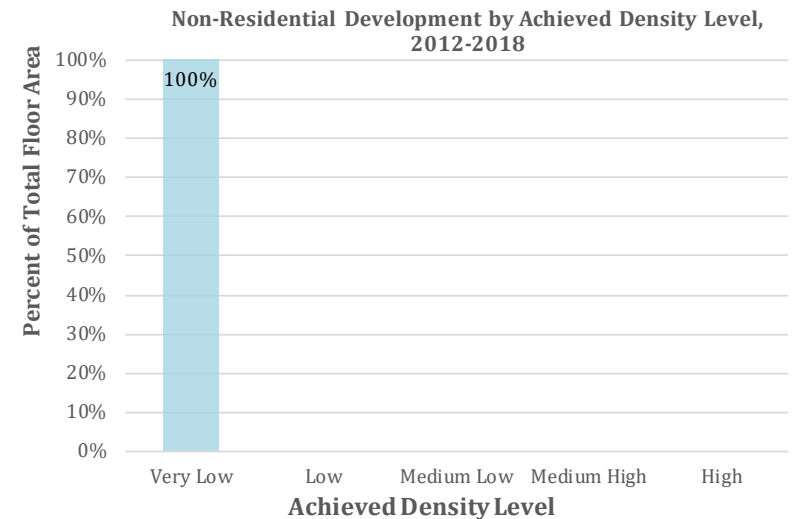
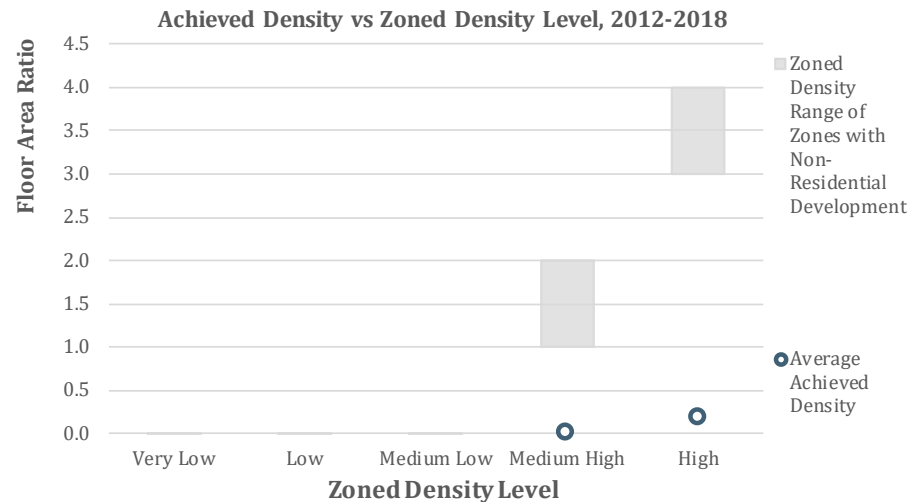
% of Pace Needed to Achieve 2035 Jobs Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Rate Needed to Meet 2035 Target
26.8%	0.44%	2.05%

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 2.1% 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	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



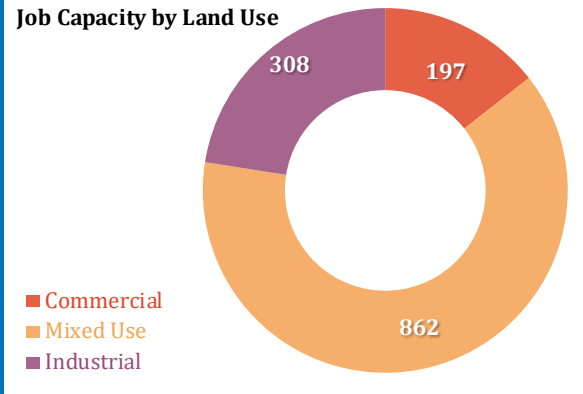
Woodinville - Commercial/Industrial Land Supply and Job Capacity

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
<i>Job Capacity in Pipeline</i>						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%
<i>Capacity in Pipeline</i>		3,006
Total Capacity (jobs)		4,373
Remaining Target (2018-2035)		5,157
Surplus/Deficit Capacity (jobs)		-784

Job Capacity by Land Use

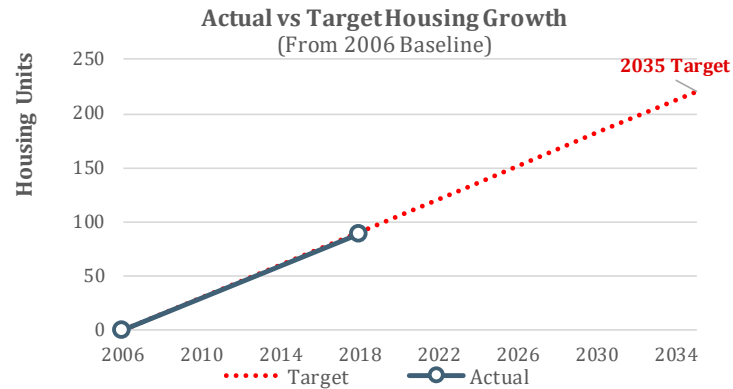


Cities and Towns

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	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Needed to Meet 2035 Target
97.3%	0.74%	0.70%

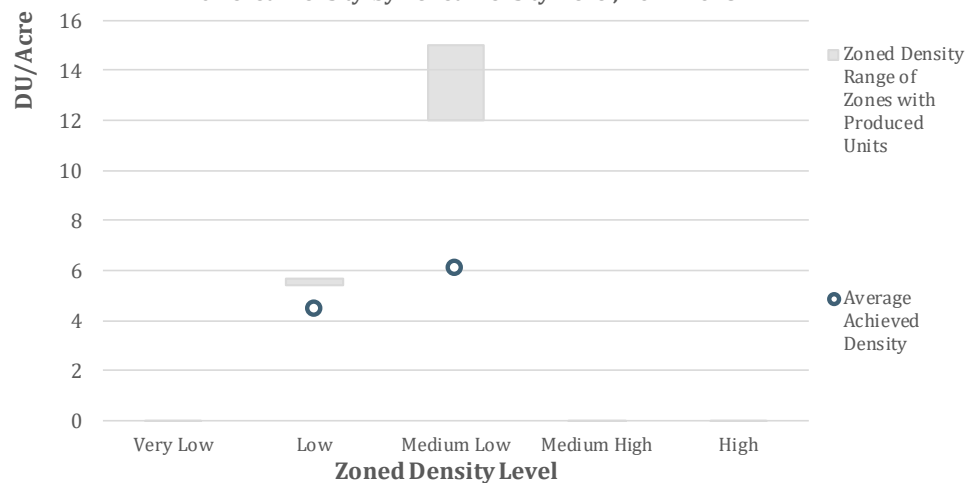
Since 2006, Algona has grown at 97% of the pace needed to achieve its 2035 housing growth target of 220 units. During this period, the total number of housing units in Algona grew by roughly 9%. At this current rate, Algona is under the production pace needed to meet its 2035 growth target, and needs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

Residential Achieved Densities

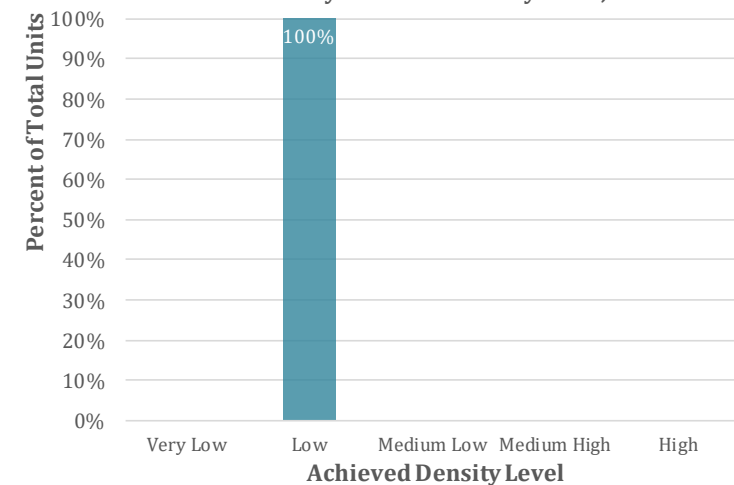
Zoned Density (du/acre)	Gross Area (acres)	Critical Areas (acres)	Public Purpose (acres)	ROWs (acres)	Net Area (acres)	Total Units	Achieved Density (DU/acre)
Very Low	0 - 4 du/acre	0.0	0.0	0.0	0.0	0	
Low	4 - 10 du/acre	2.9	0.0	0.0	2.9	13	4.4
Medium Low	10 - 24 du/acre	4.0	0.0	0.0	4.0	24	6.1
Medium High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

Achieved Density by Zoned Density Level, 2012-2018

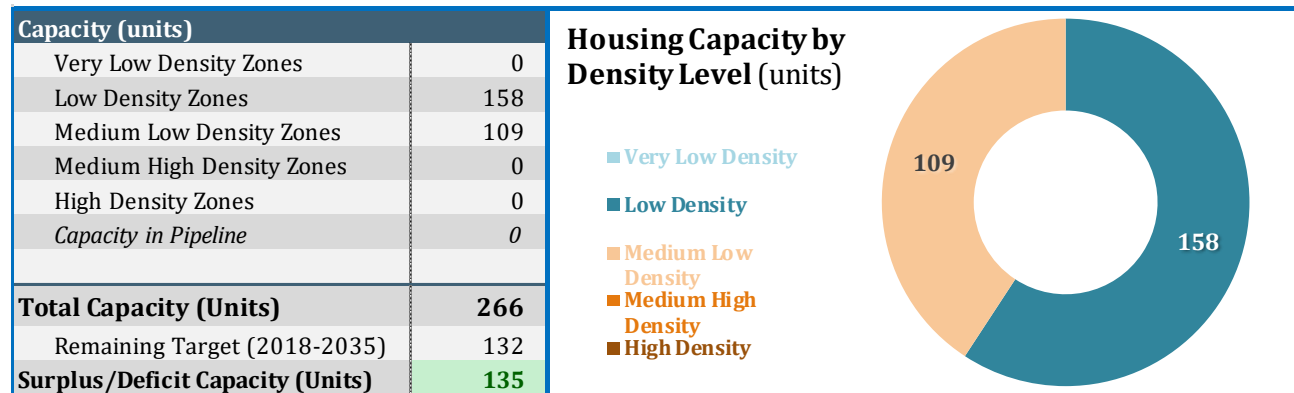


Permitted Units by Achieved Density Level, 2012-2018

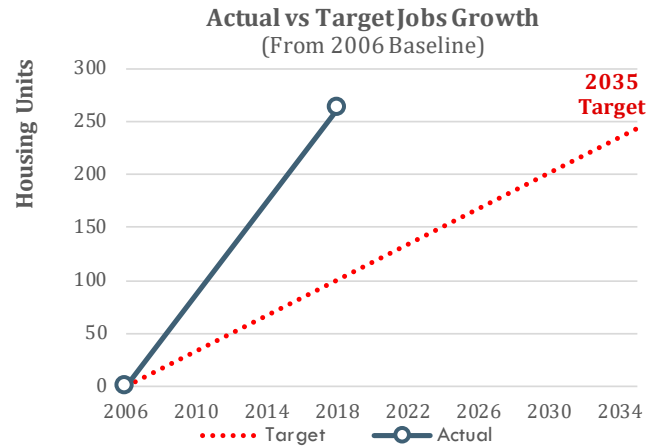


Algona - Residential Land Supply and Capacity

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



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

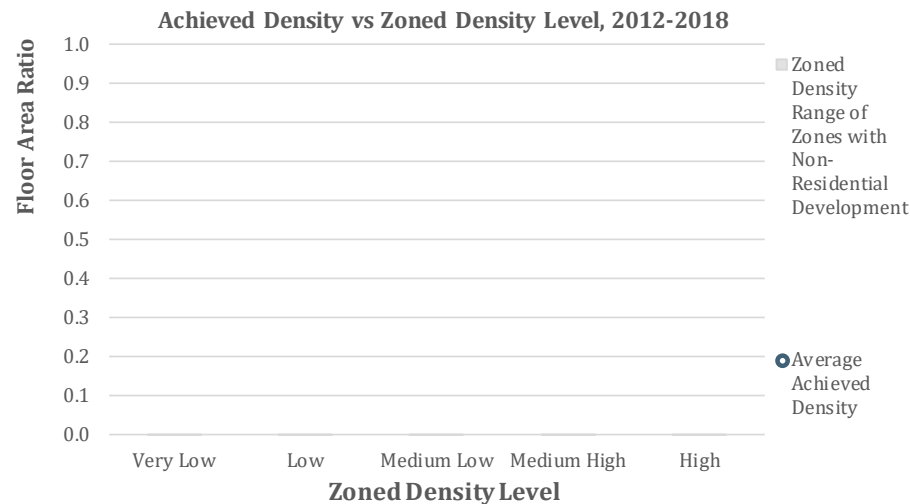
% of Pace Needed to Achieve 2035 Jobs Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Rate Needed to Meet 2035 Target
260.9%	1.10%	Met Target

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



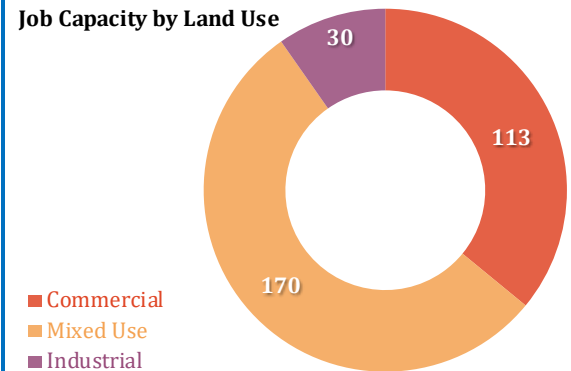
Algona - Commercial/Industrial Land Supply and Job Capacity

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
<i>Job Capacity in Pipeline</i>						<i>0</i>
City Total	0.60	0.50	1.86	0.20	0 / 950	313

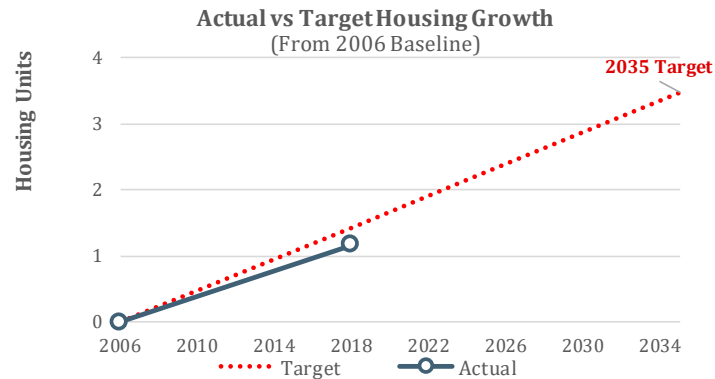
Job Capacity by Assumed Density Level	#	%
Very Low Density	113	36%
Low Density	170	54%
Medium Low Density	30	10%
Medium High Density	0	0%
High Density	0	0%
<i>Capacity in Pipeline</i>		<i>0</i>
Total Capacity (jobs)		313
Remaining Target (2018-2035)		0
Surplus/Deficit Capacity (jobs)		313

Job Capacity by Land Use



City of Beaux Arts

Housing Growth and Residential Development Trends



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

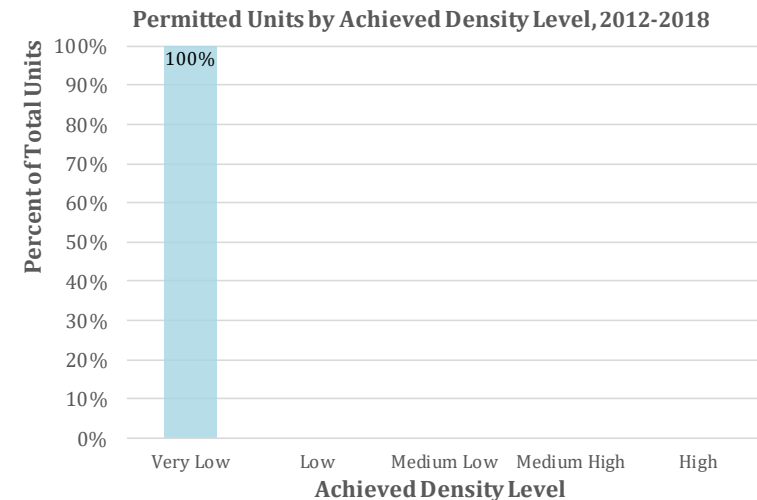
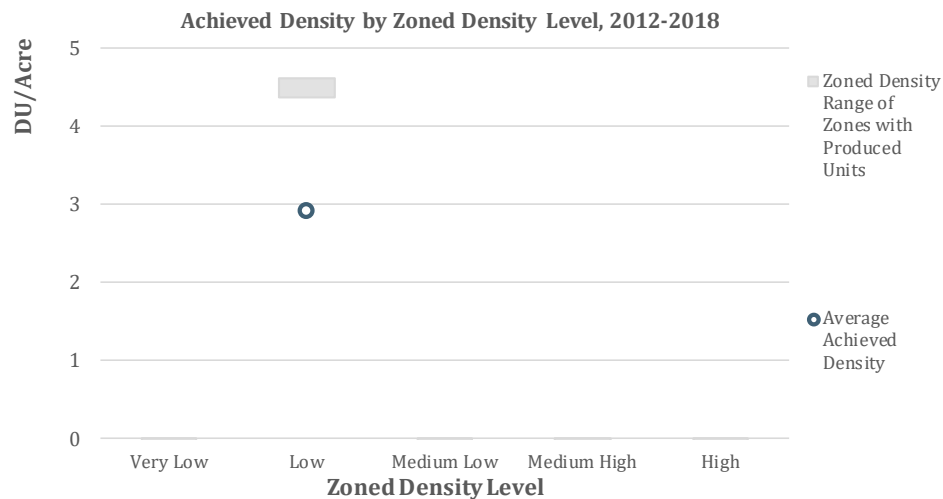
% of Pace Needed to Achieve 2035 Housing Growth Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Needed to Meet 2035 Target
81.5%	0.08%	0.11%

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

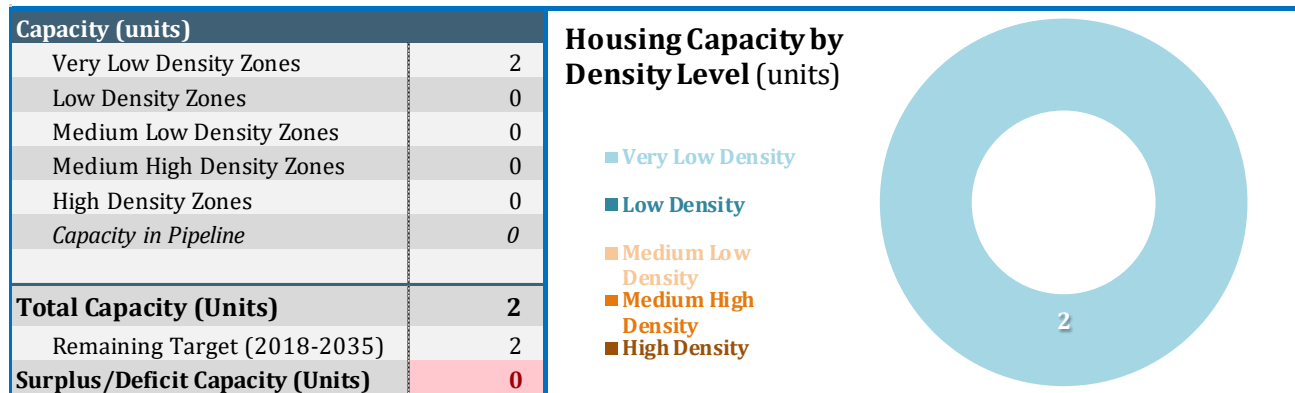
Zoned Density (du/acre)	Gross Area (acres)	Critical Areas (acres)	Public Purpose (acres)	ROWs (acres)	Net Area (acres)	Total Units	Achieved Density (DU/acre)
Very Low	0 - 4 du/acre	0.0	0.0	0.0	0.0	0	
Low	4 - 10 du/acre	1.0	0.0	0.0	1.0	3	2.9
Medium Low	10 - 24 du/acre	0.0	0.0	0.0	0.0	0	
Medium High	24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

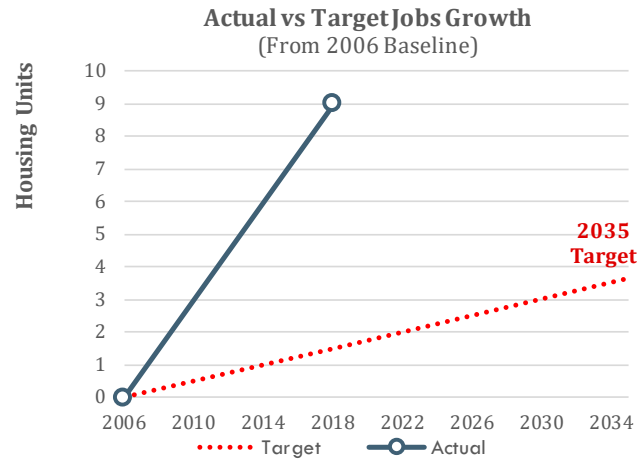


Beaux Arts - Residential Land Supply and Capacity

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



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

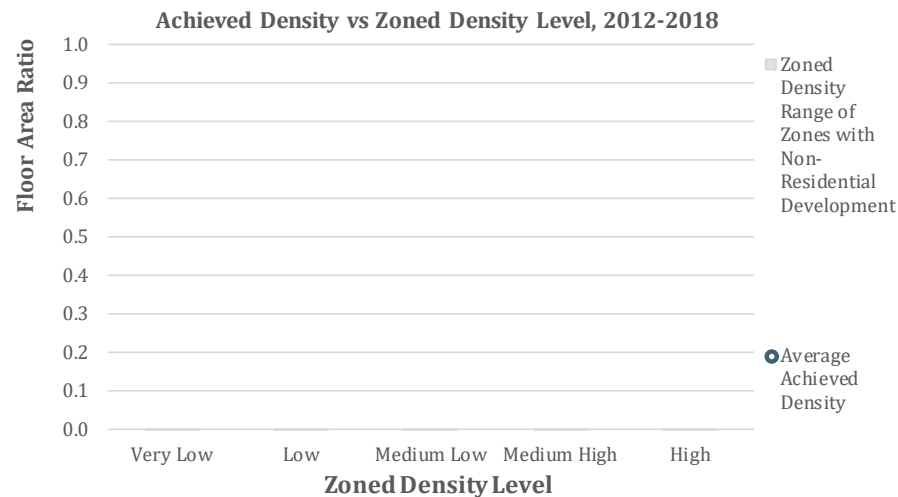
% of Pace Needed to Achieve 2035 Jobs Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Rate Needed to Meet 2035 Target
595.2%	4.48%	Met Target

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

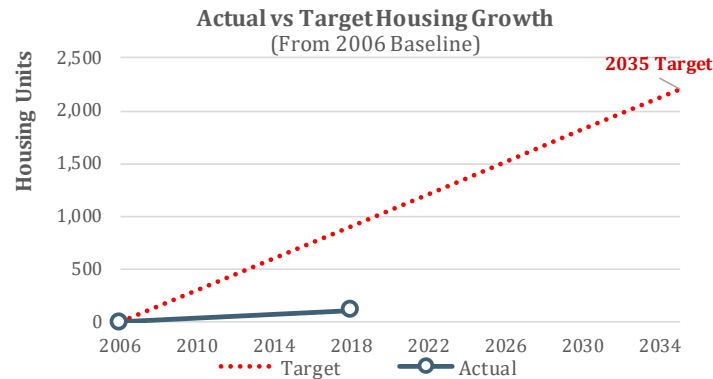


Beaux Arts - Commercial/Industrial Land Supply and Job Capacity

(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

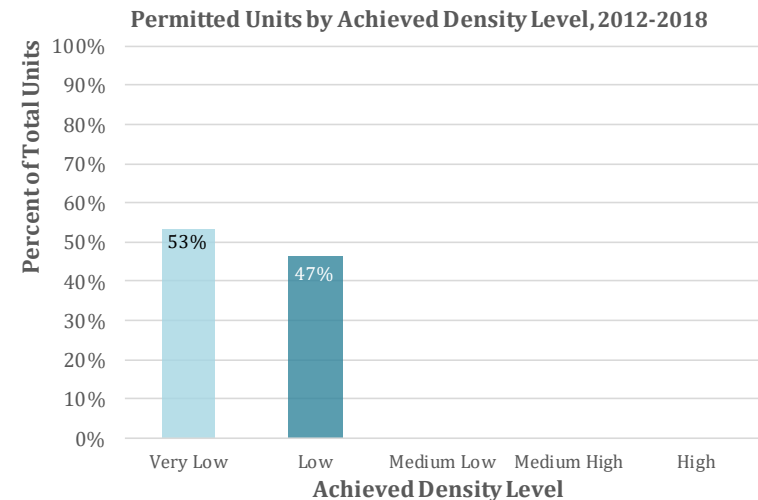
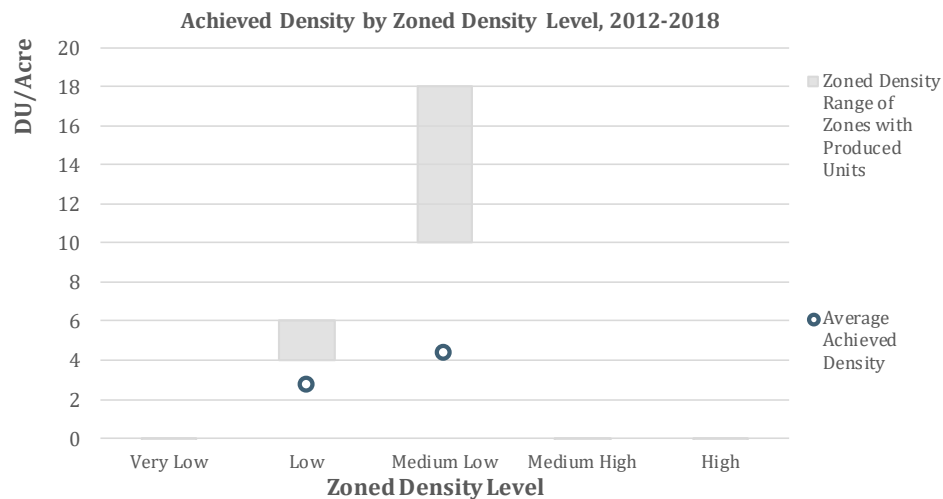
% of Pace Needed to Achieve 2035 Housing Growth Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Needed to Meet 2035 Target
12.2%	0.56%	4.77%

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 4.8% to reach its remaining target by 2035.

Residential Achieved Densities

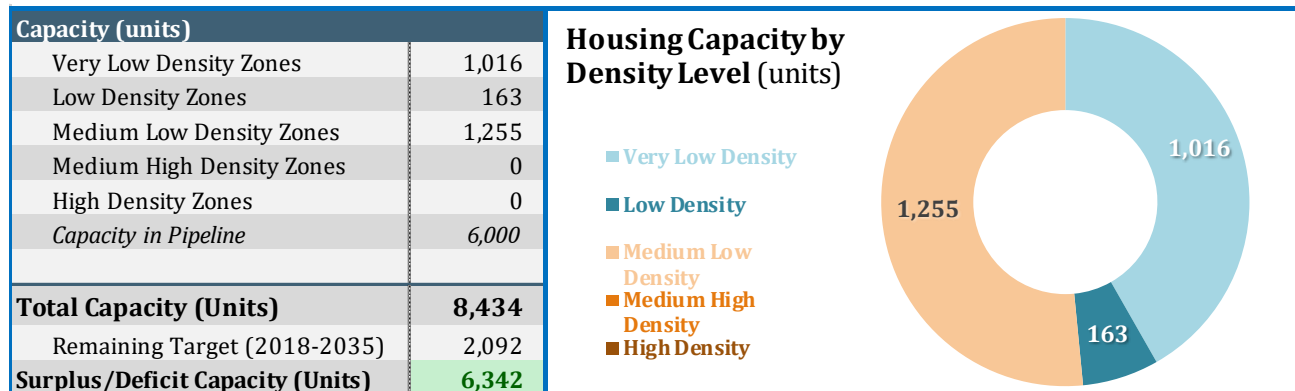
Zoned Density (du/acre)		Gross Area (acres)	Critical Areas (acres)	Public Purpose (acres)	ROWs (acres)	Net Area (acres)	Total Units	Achieved Density (DU/acre)
Very Low	0 - 4 du/acre	0.0	0.0	0.0	0.0	0.0	0	
Low	4 - 10 du/acre	23.6	1.8	0.2	0.4	21.3	57	2.7
Medium Low	10 - 24 du/acre	16.1	0.0	1.7	7.2	7.1	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

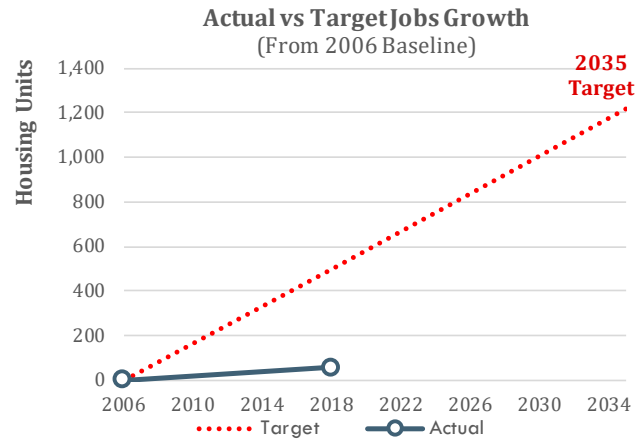


Black Diamond - Residential Land Supply and Capacity

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



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

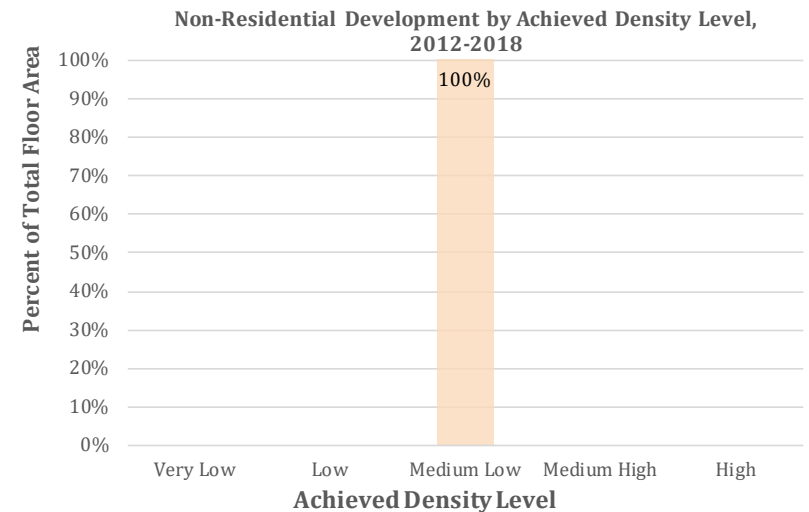
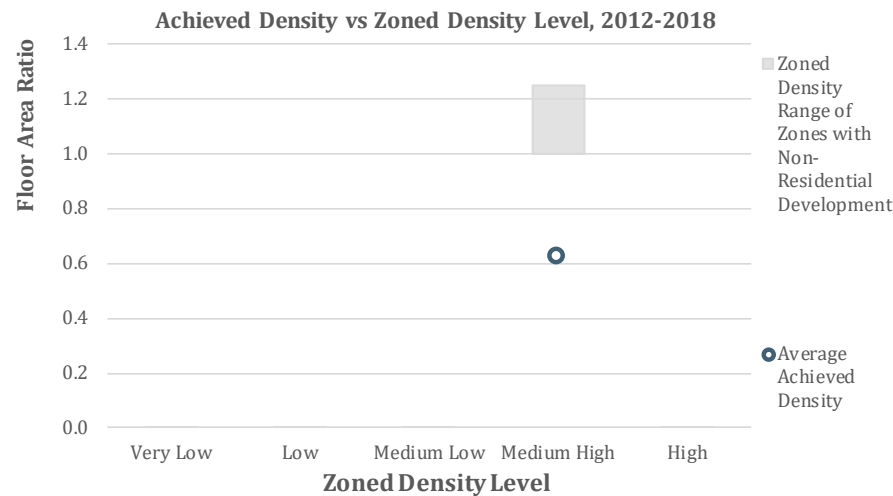
% of Pace Needed to Achieve 2035 Jobs Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Rate Needed to Meet 2035 Target
11.3%	0.98%	7.22%

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 7.2% 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	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

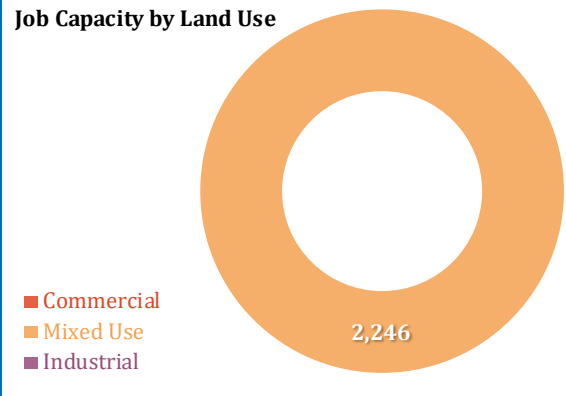
Land Supply	Gross Area (acres)	Critical Areas (acres)	ROWs (acres)	Public Purpose (acres)	Initial Land Supply	Market Factor	Buildable Area (acres)
Vacant / Redev.							
Commercial	2.4	2.4	0.0	0.0	0.0	0%	0.0
Mixed Use	156.3	6.2	7.5	7.5	135.1	25% - 50%	90.5
Industrial	70.7	0.0	3.5	3.5	63.6	70%	14.1
Non-Res 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
<i>Job Capacity in Pipeline</i>						942
City Total	6.52	0.40	1.86	1.35	600 / 1000	3,188

*Certain zones grouped as commercial allow for industrial use.

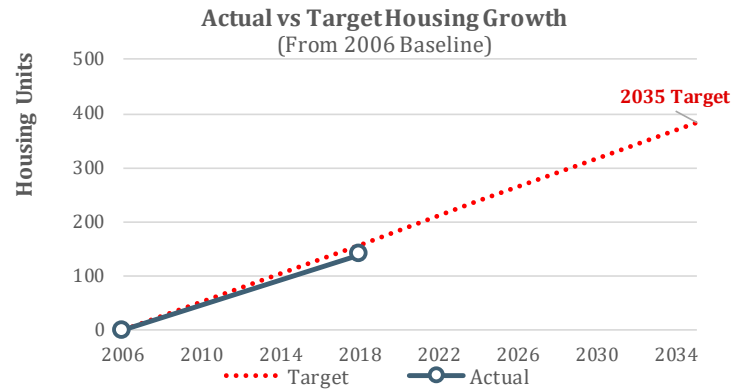
Job Capacity by Assumed Density Level	#	%
Very Low Density	67	3%
Low Density	2,179	97%
Medium Low Density	0	0%
Medium High Density	0	0%
High Density	0	0%
<i>Capacity in Pipeline</i>		942
Total Capacity (jobs)		3,188
Remaining Target (2018-2035)		1,161
Surplus/Deficit Capacity (jobs)		2,027

Job Capacity by Land Use



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	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Needed to Meet 2035 Target
88.7%	1.46%	1.44%

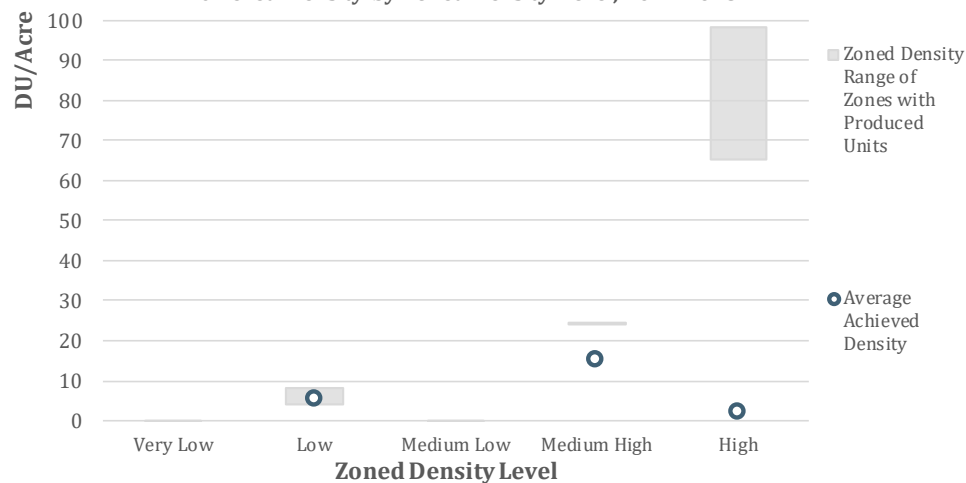
Since 2006, Carnation has grown at 89% of the pace needed to achieve its 2035 housing growth target of 383 units. During this period, the total number of housing units in Carnation grew by roughly 19%. At this current rate, Carnation is under the production pace needed to meet its 2035 growth target, and needs to grow at an annual rate of 1.4% to reach its remaining target by 2035.

Residential Achieved Densities

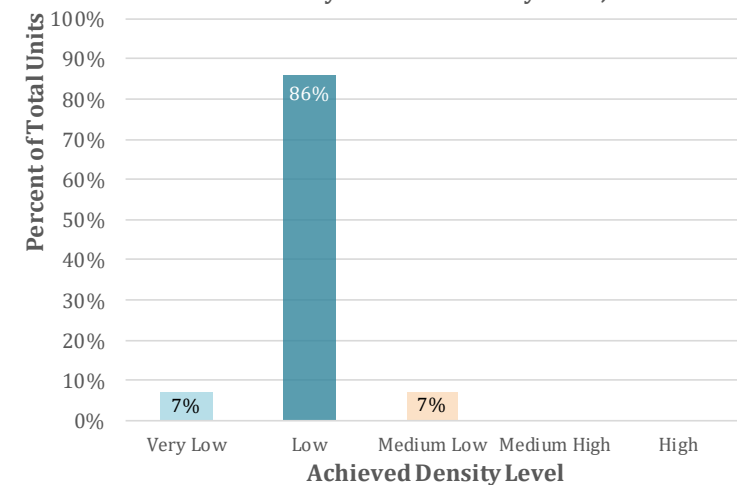
Zoned Density (du/acre)	Gross Area (acres)	Critical Areas (acres)	Public Purpose (acres)	ROWs (acres)	Net Area (acres)	Total Units	Achieved Density (DU/acre)
Very Low	0 - 4 du/acre	0.0	0.0	0.0	0.0	0	
Low	4 - 10 du/acre	29.7	0.1	0.0	29.6	156	5.3
Medium Low	10 - 24 du/acre	0.0	0.0	0.0	0.0	0	
Medium High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

Achieved Density by Zoned Density Level, 2012-2018

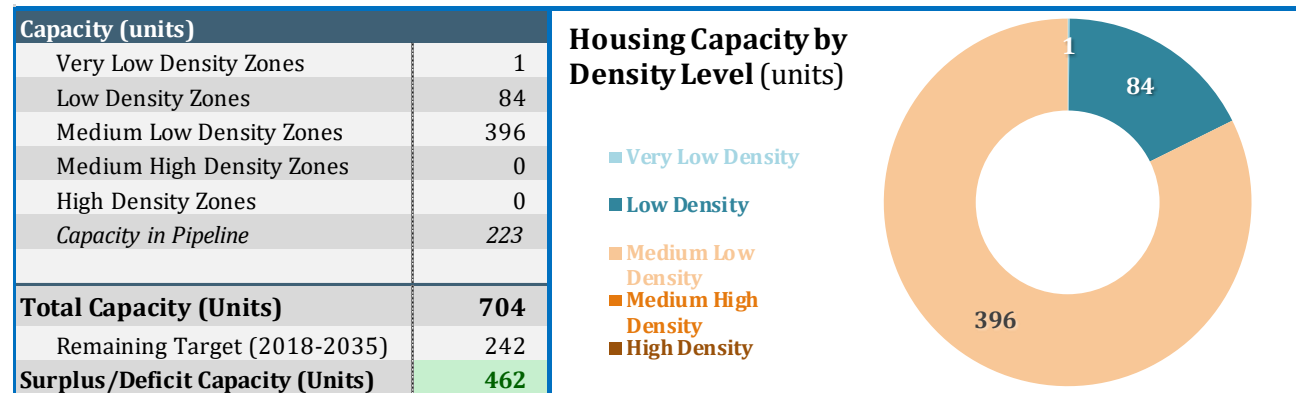


Permitted Units by Achieved Density Level, 2012-2018

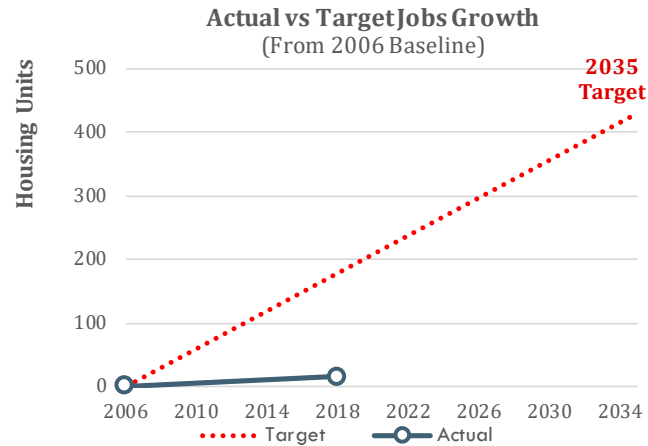


Carnation - Residential Land Supply and Capacity

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



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

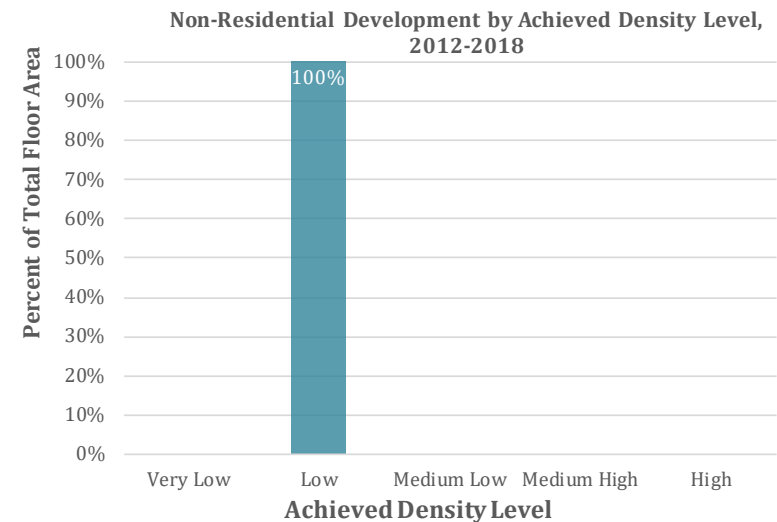
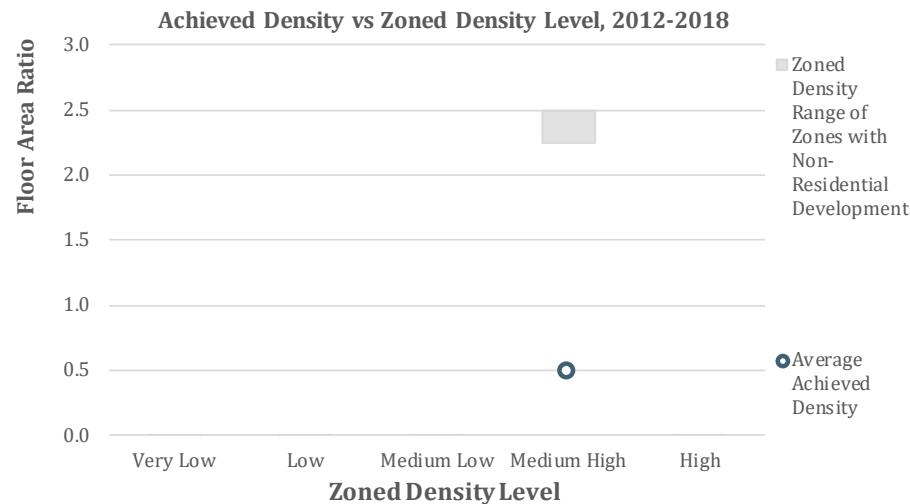
% of Pace Needed to Achieve 2035 Jobs Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Rate Needed to Meet 2035 Target
8.4%	0.14%	2.28%

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 2.3% 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	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

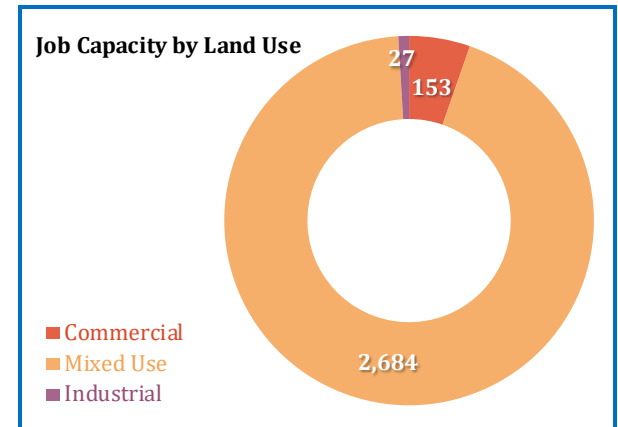


Carnation - Commercial/Industrial Land Supply and Job Capacity

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

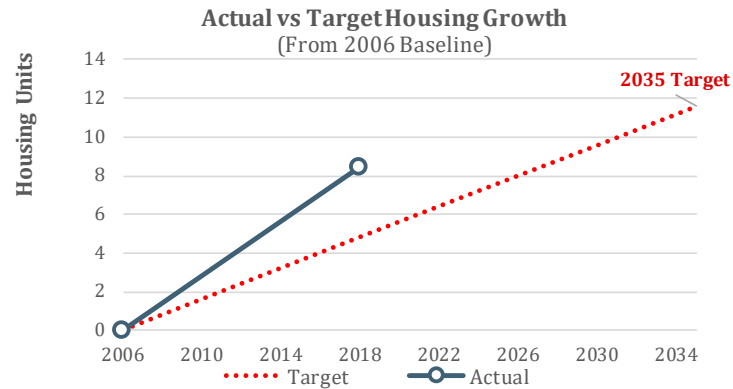
Job Capacity by Land Use	Net Buildable Area (mil.sq.ft.)	Assumed Density Range (FAR)	Existing Floor Area (million sq.ft.)	Floor Area Capac. (million sq.ft.)	Sq. ft. per Job	Job Capacity
Commercial						
Vacant	0.00	2.25	0.00	0.00	300	0
Redevelopable	0.02	2.25	0.00	0.05	300	153
Commercial Total	0.02	2.25	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
<i>Job Capacity in Pipeline</i>						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%
<i>Capacity in Pipeline</i>		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

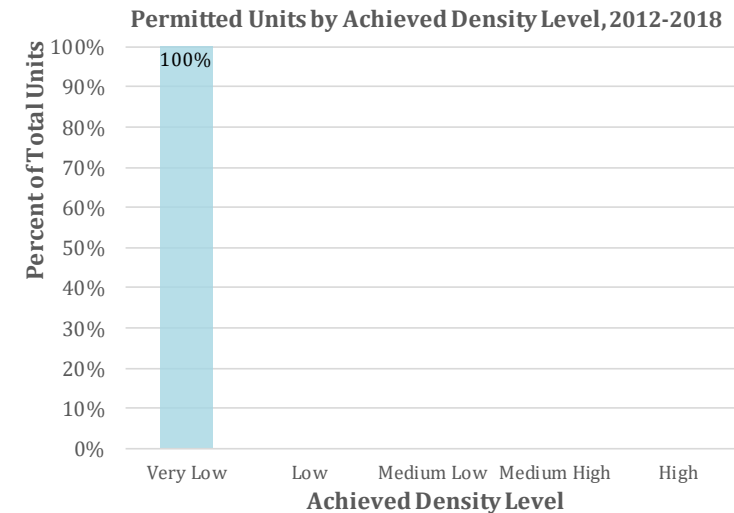
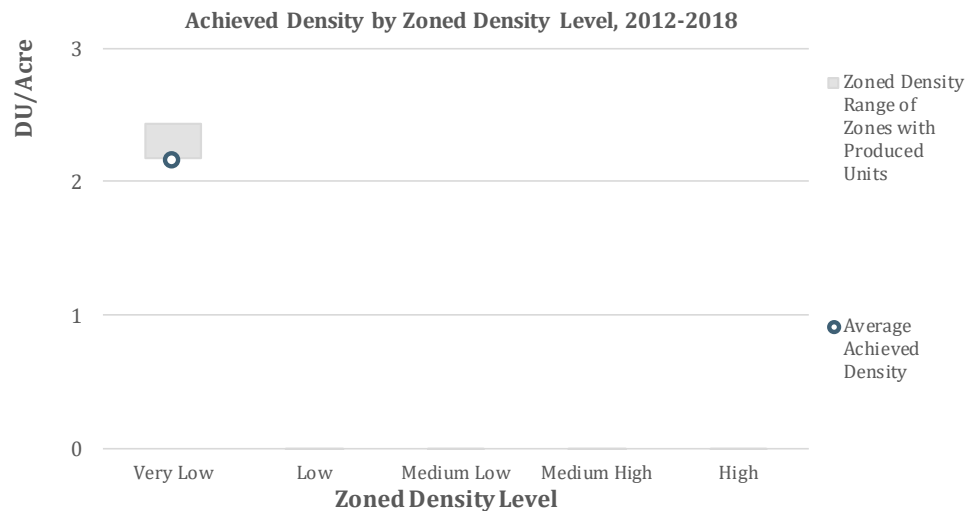
% of Pace Needed to Achieve 2035 Housing Growth Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Needed to Meet 2035 Target
175.6%	0.06%	0.02%

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

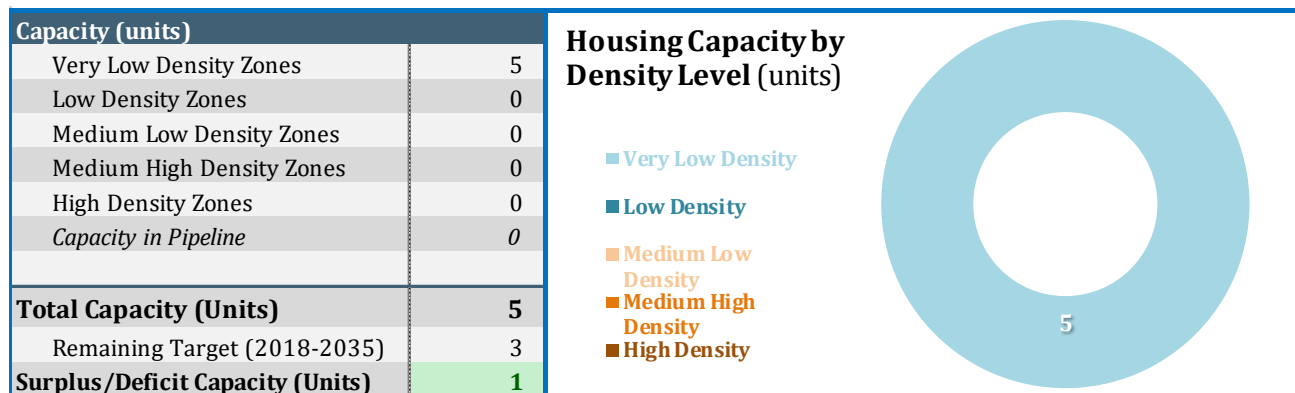
Zoned Density (du/acre)		Gross Area (acres)	Critical Areas (acres)	Public Purpose (acres)	ROWs (acres)	Net Area (acres)	Total Units	Achieved Density (DU/acre)
Very Low	0 - 4 du/acre	2.8	0.0	0.0	0.0	2.8	6	2.2
Low	4 - 10 du/acre	0.0	0.0	0.0	0.0	0.0	0	
Medium Low	10 - 24 du/acre	0.0	0.0	0.0	0.0	0.0	0	
Medium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

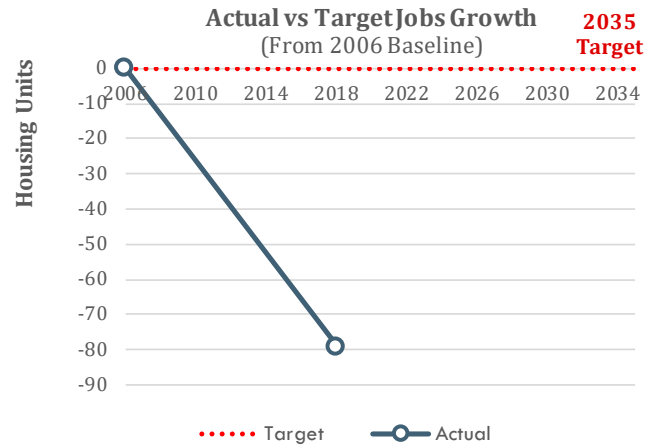


Clyde Hill - Residential Land Supply and Capacity

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



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	Not Applicable

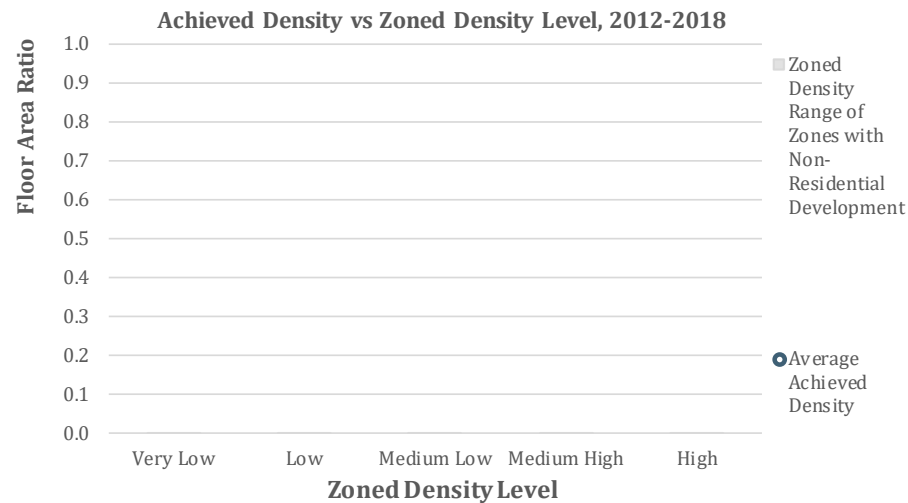
% of Pace Needed to Achieve 2035 Jobs Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Rate Needed to Meet 2035 Target
Not Applicable	-0.97%	Not Applicable

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
<i>Job Capacity in Pipeline</i>						28
City Total	0.00	1.20	1.86	0.00	0 / 300	28

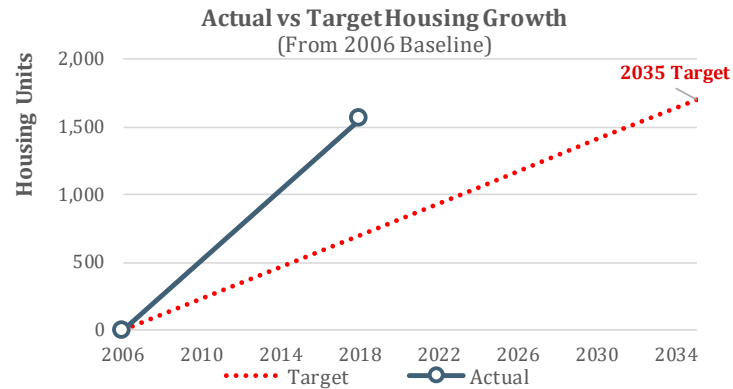
Job Capacity by Assumed Density Level	#	%
Very Low Density	0	
Low Density	0	
Medium Low Density	0	
Medium High Density	0	
High Density	0	
<i>Capacity in Pipeline</i>		28
Total Capacity (jobs)		28
Remaining Target (2018-2035)		79
Surplus/Deficit Capacity (jobs)		-51

Job Capacity by Land Use

- Commercial
- Mixed Use
- Industrial

City of Covington

Housing Growth and Residential Development Trends



Covington Housing Growth Target: 2006-2035	
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	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Needed to Meet 2035 Target
221.7%	2.12%	0.12%

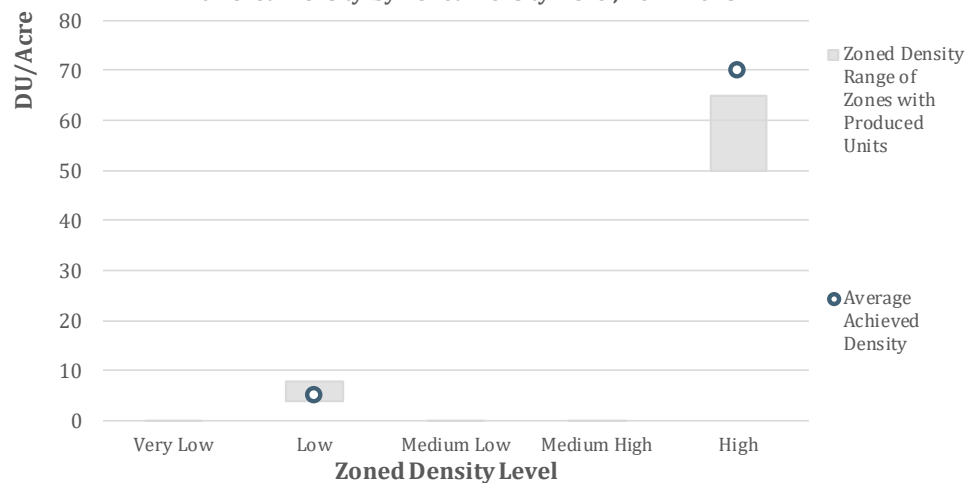
Since 2006, Covington has grown at 222% of the pace needed to achieve its 2035 housing growth target of 1,705 units. During this period, the total number of housing units in Covington grew by roughly 29%. At this current rate, Covington is over the production pace needed to meet its 2035 growth target,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

Residential Achieved Densities

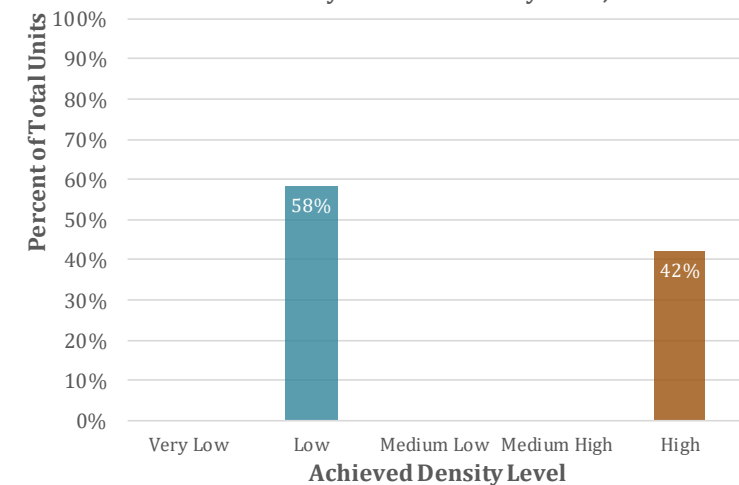
Zoned Density (du/acre)	Gross Area (acres)	Critical Areas (acres)	Public Purpose (acres)	ROWs (acres)	Net Area (acres)	Total Units	Achieved Density (DU/acre)
Very Low	0 - 4 du/acre	0.0	0.0	0.0	0.0	0	
Low	4 - 10 du/acre	135.8	11.7	13.1	9.2	101.8	4.8
Medium Low	10 - 24 du/acre	0.0	0.0	0.0	0.0	0	
Medium High	24 - 48 du/acre	0.0	0.0	0.0	0.0	0	
High	48 & up du/acre	7.0	0.0	0.7	1.2	5.1	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

Achieved Density by Zoned Density Level, 2012-2018

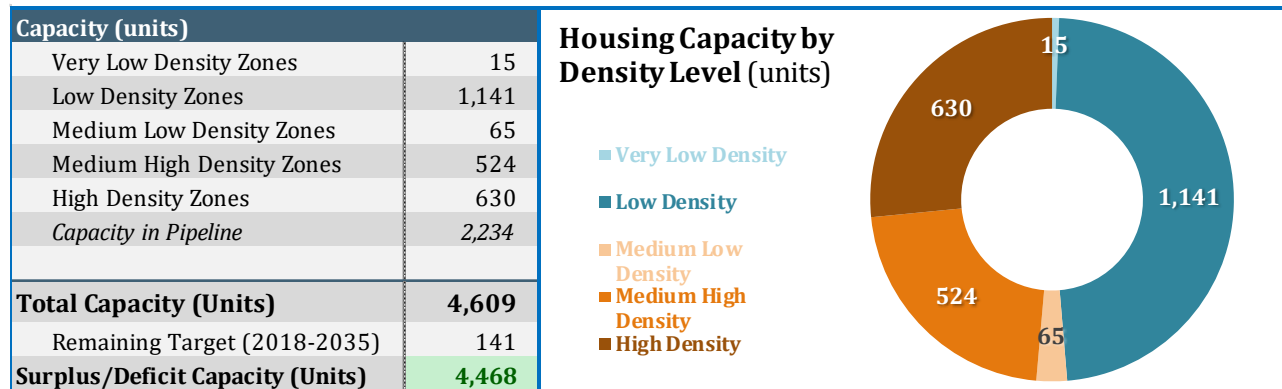


Permitted Units by Achieved Density Level, 2012-2018

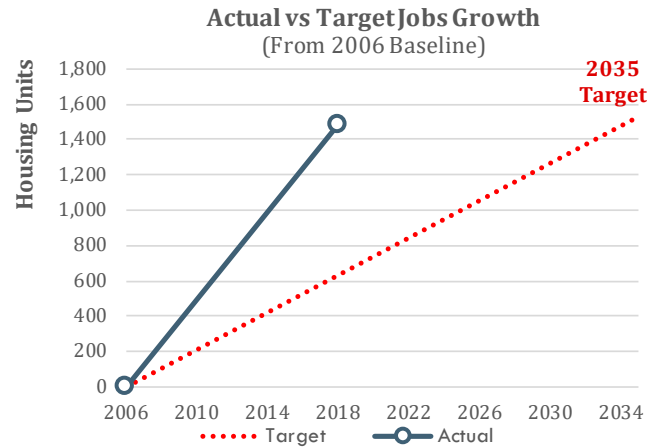


Covington - Residential Land Supply and Capacity

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



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

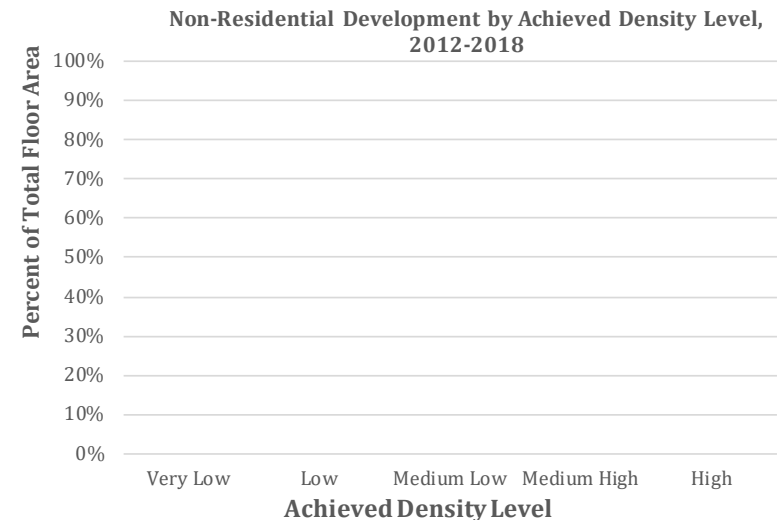
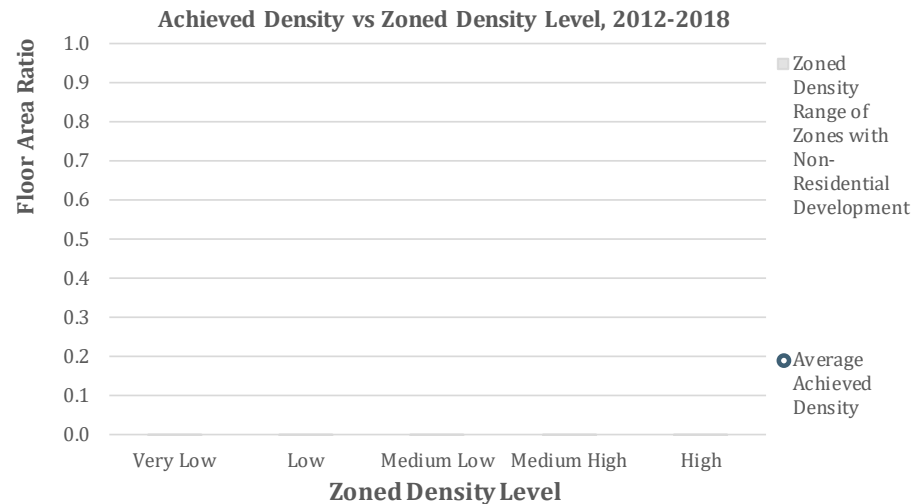
% of Pace Needed to Achieve 2035 Jobs Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Rate Needed to Meet 2035 Target
234.4%	2.97%	0.05%

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

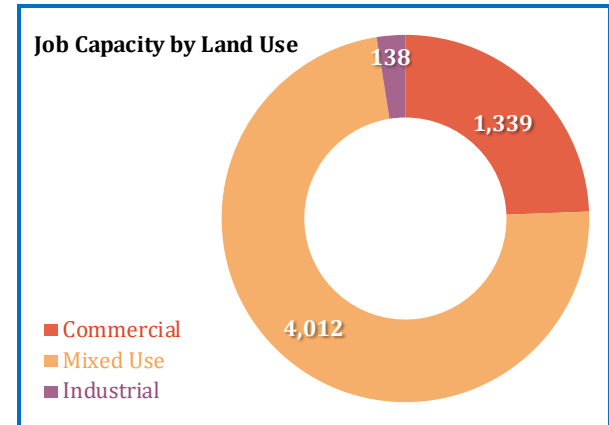


Covington - Commercial/Industrial Land Supply and Job Capacity

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

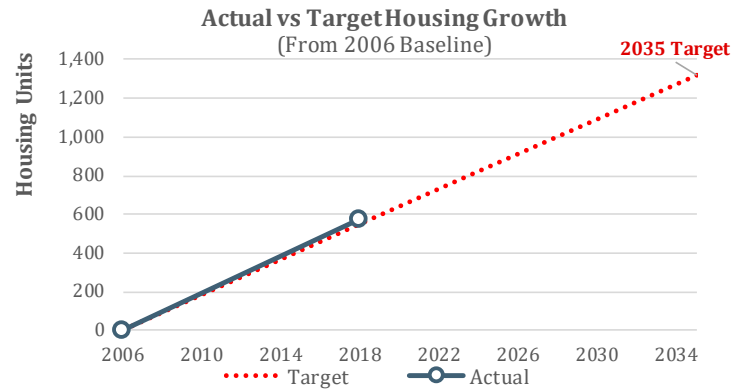
Job Capacity by Land Use	Net Buildable Area (mil.sq.ft.)	Assumed Density Range (FAR)	Existing Floor Area (million sq.ft.)	Floor Area Capac. (million sq.ft.)	Sq. ft. per Job	Job Capacity
Commercial						
Vacant	0.79	0.23 / 0.69	0.00	0.41	400	1,019
Redevelopable	0.30	0.23 / 0.69	0.03	0.13	400	320
Commercial 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	3,429
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
<i>Job Capacity in Pipeline</i>						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%
<i>Capacity in Pipeline</i>		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	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Needed to Meet 2035 Target
105.3%	2.04%	1.46%

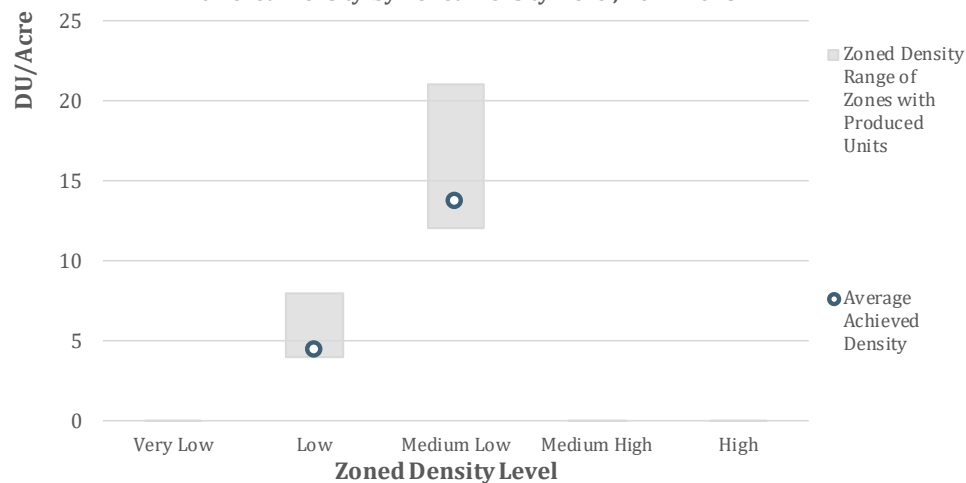
Since 2006, Duvall has grown at 105% of the pace needed to achieve its 2035 housing growth target of 1,322 units. During this period, the total number of housing units in Duvall grew by roughly 27%. At this current rate, Duvall is over the production pace needed to meet its 2035 growth target, and needs to grow at an annual rate of 1.5% to reach its remaining target by 2035.

Residential Achieved Densities

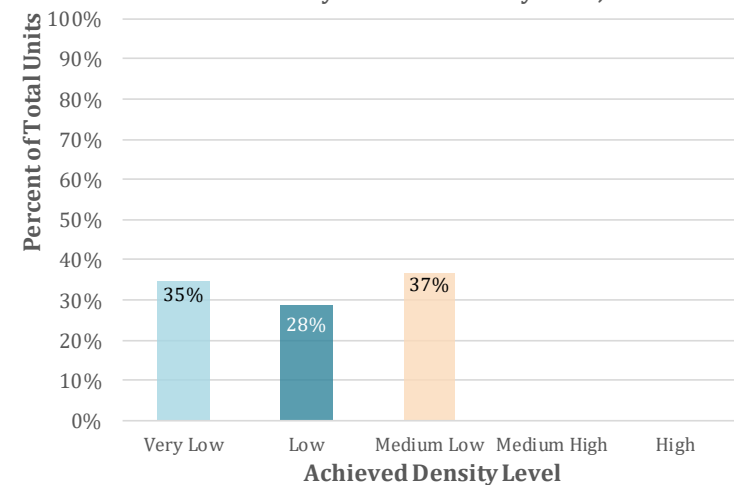
Zoned Density (du/acre)	Gross Area (acres)	Critical Areas (acres)	Public Purpose (acres)	ROWs (acres)	Net Area (acres)	Total Units	Achieved Density (DU/acre)
Very Low	0 - 4 du/acre	0.0	0.0	0.0	0.0	0	
Low	4 - 10 du/acre	51.8	11.6	4.5	8.0	27.8	122
Medium Low	10 - 24 du/acre	7.3	0.0	0.8	1.3	5.2	71
Medium 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

Achieved Density by Zoned Density Level, 2012-2018

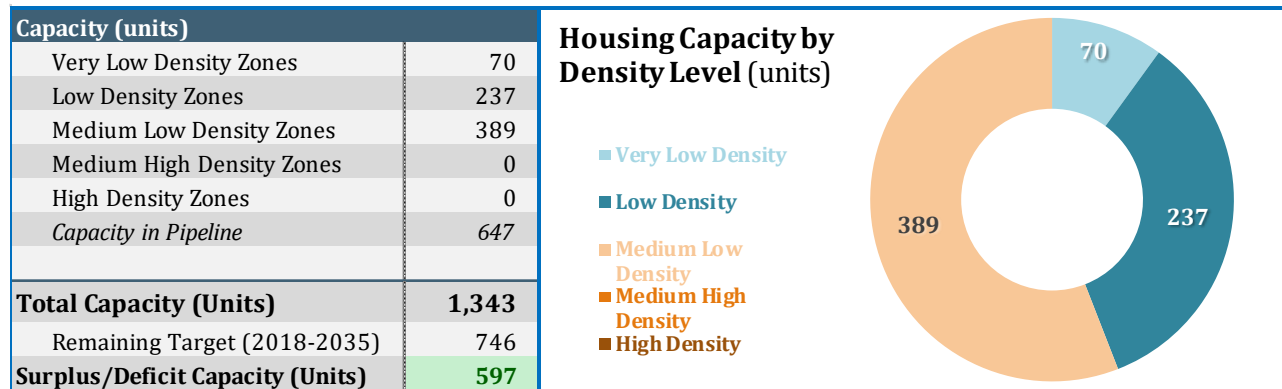


Permitted Units by Achieved Density Level, 2012-2018

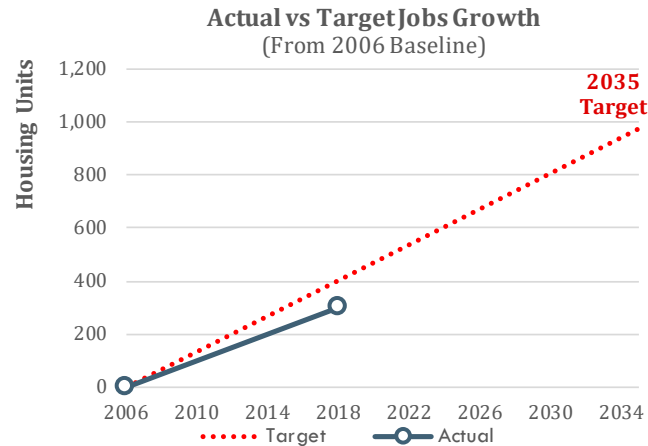


Duvall - Residential Land Supply and Capacity

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



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

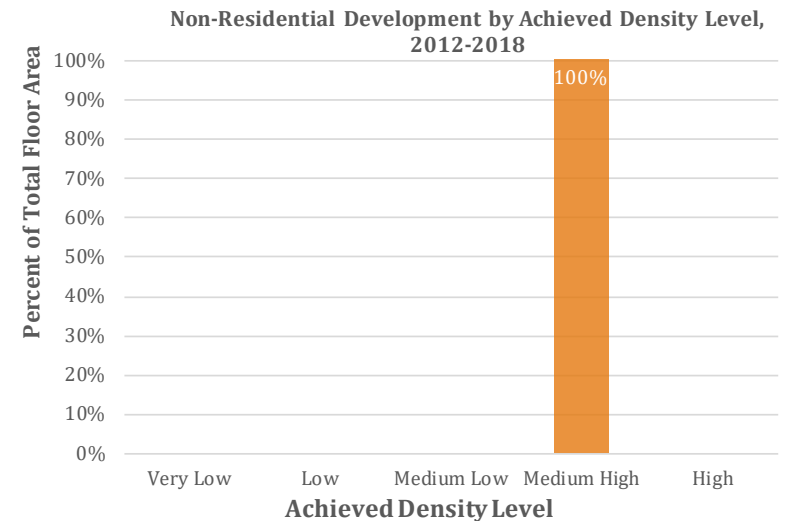
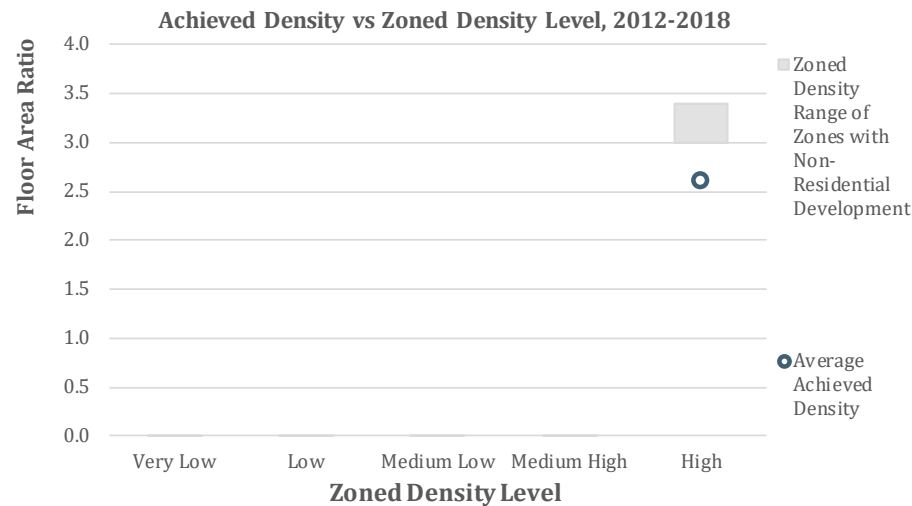
% of Pace Needed to Achieve 2035 Jobs Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Rate Needed to Meet 2035 Target
74.7%	1.91%	2.23%

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 2.2% 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	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



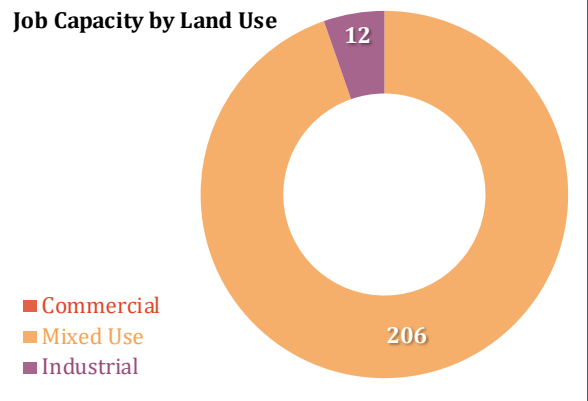
Duvall - Commercial/Industrial Land Supply and Job Capacity

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
<i>Job Capacity in Pipeline</i>						<i>464</i>
City Total	0.67	0.40	1.86	0.14	0 / 1400	681

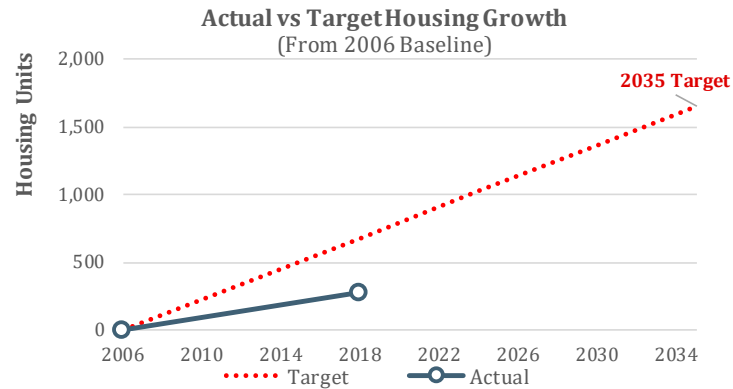
Job Capacity by Assumed Density Level	#	%
Very Low Density	206	95%
Low Density	12	5%
Medium Low Density	0	0%
Medium High Density	0	0%
High Density	0	0%
<i>Capacity in Pipeline</i>		<i>464</i>
Total Capacity (jobs)		681
Remaining Target (2018-2035)		673
Surplus/Deficit Capacity (jobs)		8

Job Capacity by Land Use



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	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Needed to Meet 2035 Target
40.7%	0.45%	1.36%

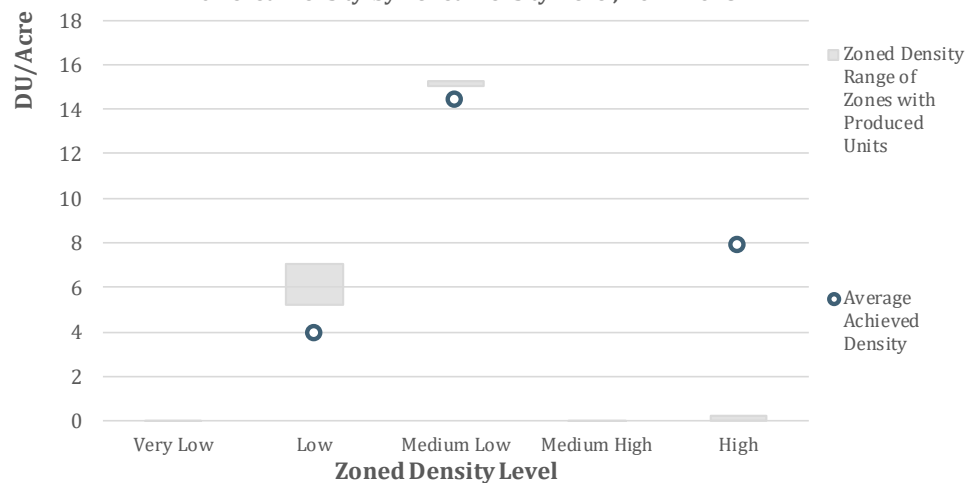
Since 2006, Enumclaw has grown at 41% of the pace needed to achieve its 2035 housing growth target of 1,653 units. During this period, the total number of housing units in Enumclaw grew by roughly 6%. At this current rate, Enumclaw is under the production pace needed to meet its 2035 growth target, and needs to grow at an annual rate of 1.4% to reach its remaining target by 2035.

Residential Achieved Densities

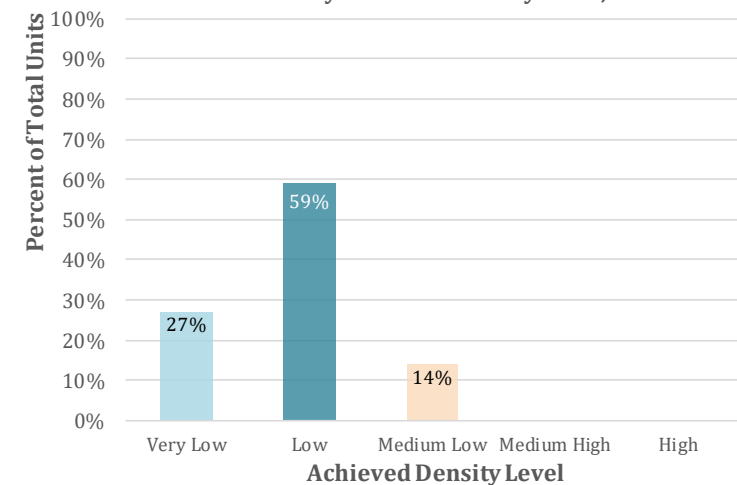
Zoned Density (du/acre)	Gross Area (acres)	Critical Areas (acres)	Public Purpose (acres)	ROWs (acres)	Net Area (acres)	Total Units	Achieved Density (DU/acre)
Very Low	0 - 4 du/acre	0.0	0.0	0.0	0.0	0	
Low	4 - 10 du/acre	46.1	0.0	1.7	40.6	157	3.9
Medium Low	10 - 24 du/acre	3.6	0.0	0.0	3.6	52	14.4
Medium High	24 - 48 du/acre	0.0	0.0	0.0	0.0	0	
High	48 & up du/acre	46.0	4.1	8.9	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

Achieved Density by Zoned Density Level, 2012-2018

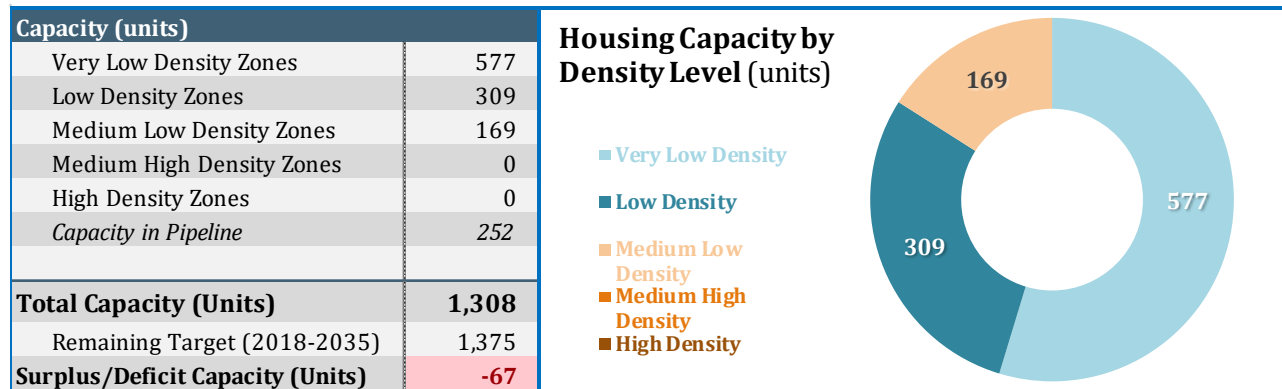


Permitted Units by Achieved Density Level, 2012-2018

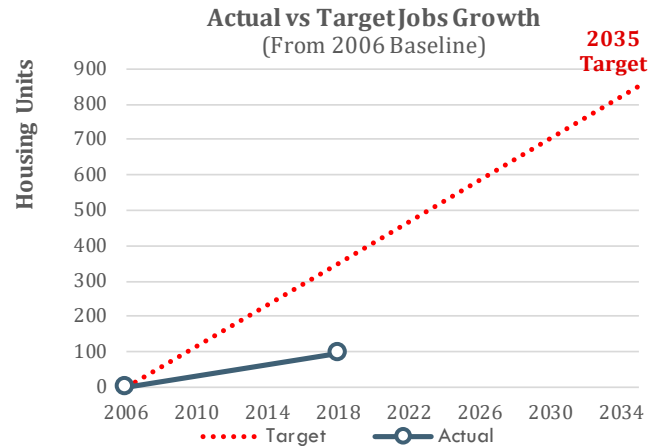


Enumclaw - Residential Land Supply and Capacity

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



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

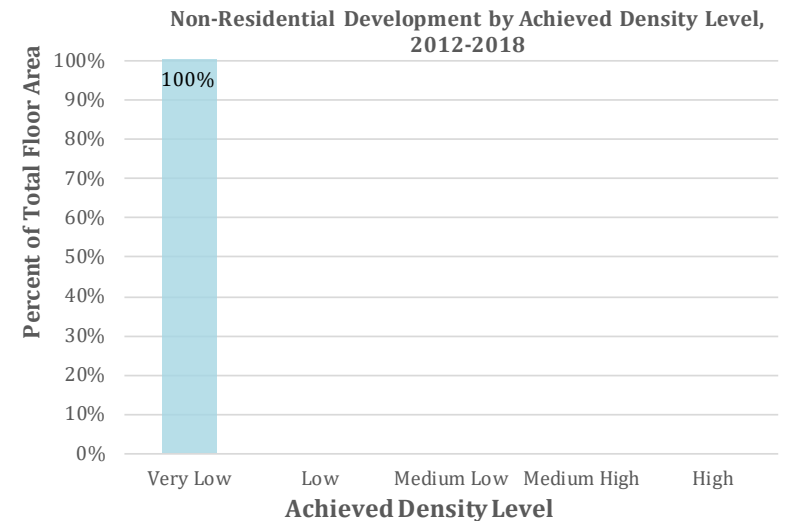
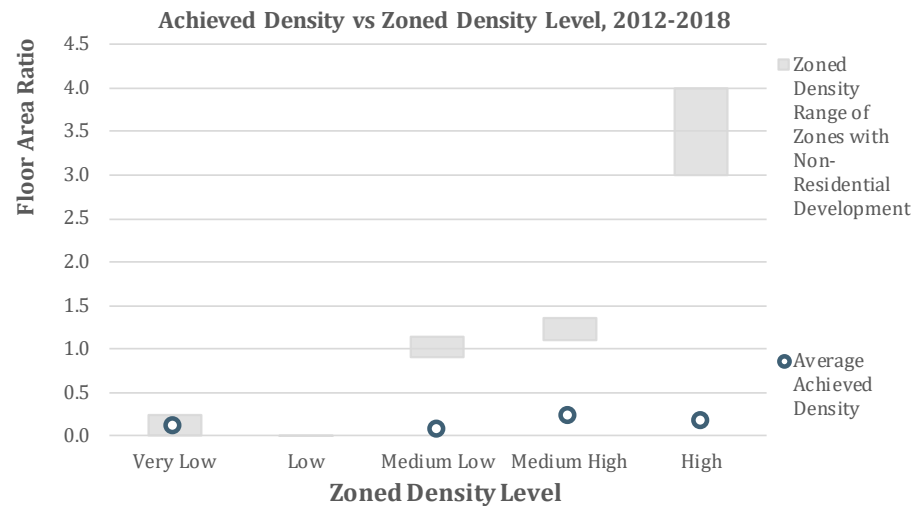
% of Pace Needed to Achieve 2035 Jobs Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Rate Needed to Meet 2035 Target
27.2%	0.16%	0.82%

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 0.8% 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	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



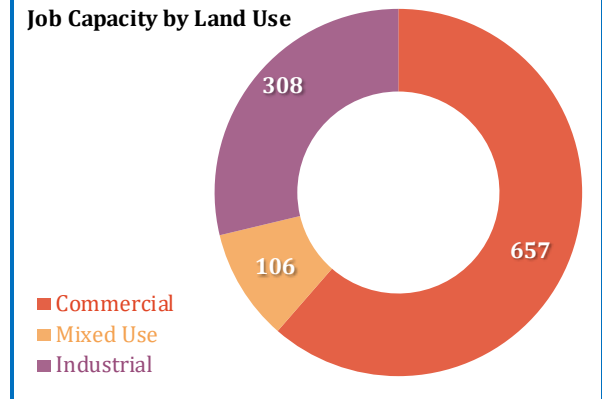
Enumclaw - Commercial/Industrial Land Supply and Job Capacity

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
<i>Job Capacity in Pipeline</i>						<i>81</i>
City Total	4.32	0.50	1.86	0.87	0 / 1200	1,152

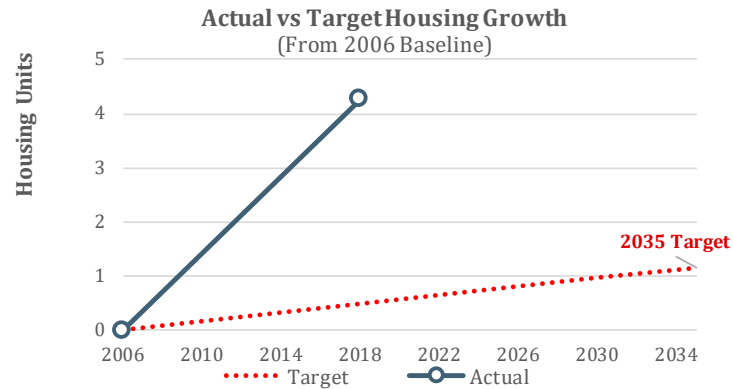
Job Capacity by Assumed Density Level	#	%
Very Low Density	981	92%
Low Density	0	0%
Medium Low Density	90	8%
Medium High Density	0	0%
High Density	0	0%
<i>Capacity in Pipeline</i>		<i>81</i>
Total Capacity (jobs)		1,152
Remaining Target (2018-2035)		757
Surplus/Deficit Capacity (jobs)		395

Job Capacity by Land Use



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

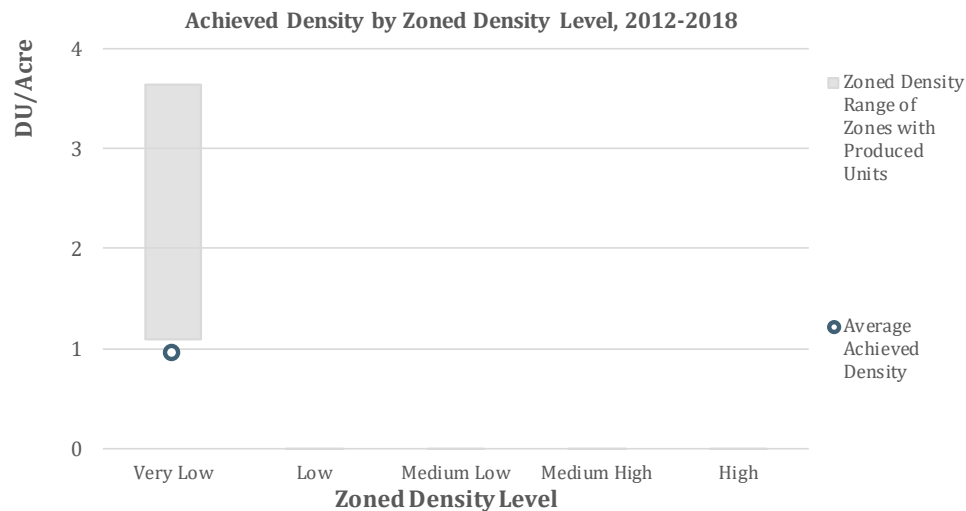
% of Pace Needed to Achieve 2035 Housing Growth Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Needed to Meet 2035 Target
887.9%	0.19%	Met Target

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

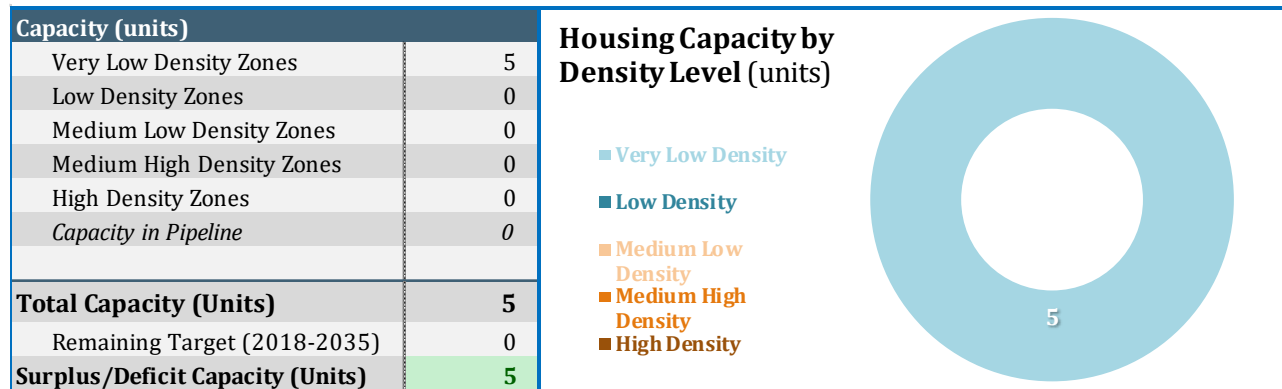
Zoned Density (du/acre)	Gross Area (acres)	Critical Areas (acres)	Public Purpose (acres)	ROWs (acres)	Net Area (acres)	Total Units	Achieved Density (DU/acre)
Very Low 0 - 4 du/acre	3.2	0.0	0.0	0.0	3.2	3	1.0
Low 4 - 10 du/acre	0.0	0.0	0.0	0.0	0.0	0	
Medium Low 10 - 24 du/acre	0.0	0.0	0.0	0.0	0.0	0	
Medium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

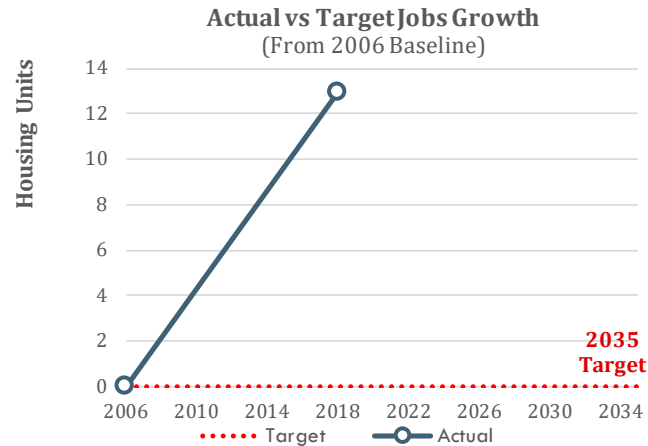


Hunts Point - Residential Land Supply and Capacity

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



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

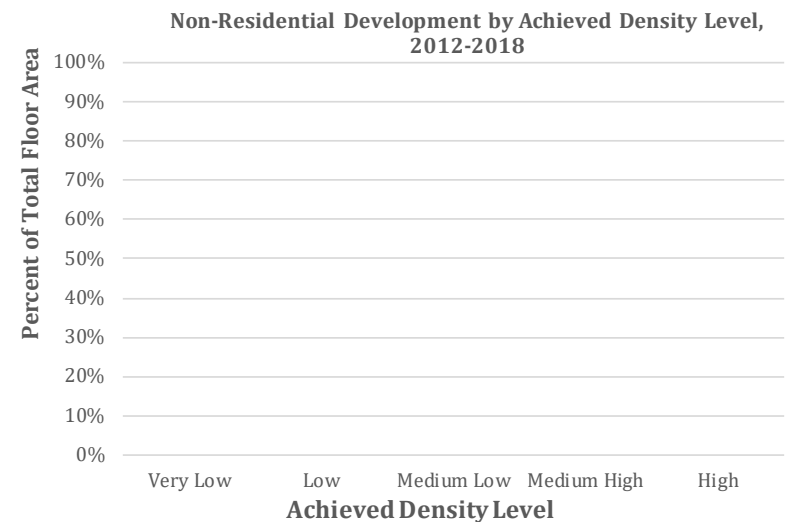
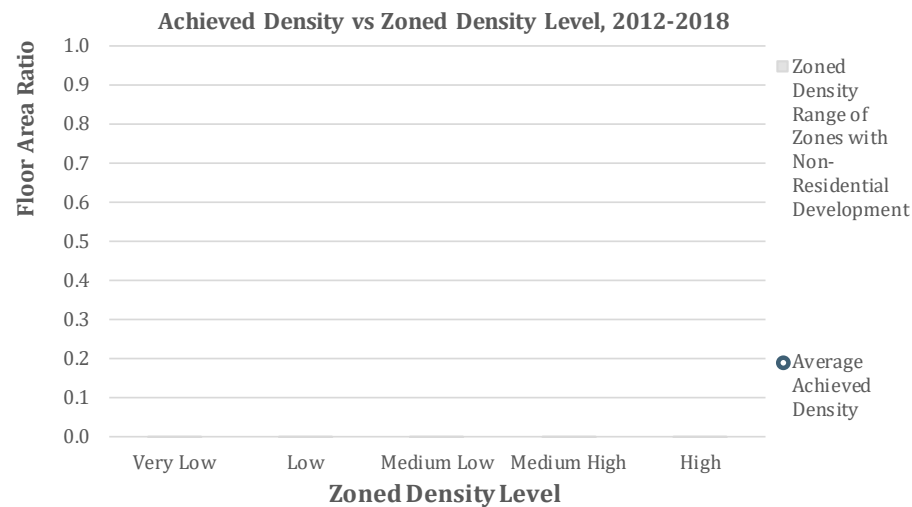
% of Pace Needed to Achieve 2035 Jobs Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Rate Needed to Meet 2035 Target
Not Applicable	1.91%	Not Applicable

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

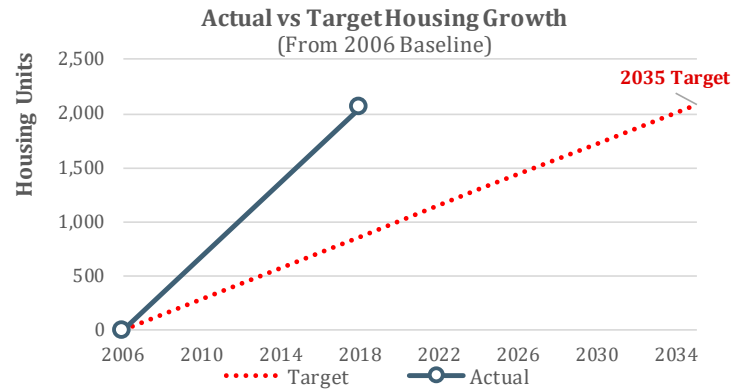


Hunts Point - Commercial/Industrial Land Supply and Job Capacity

(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	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Needed to Meet 2035 Target
238.6%	2.24%	0.02%

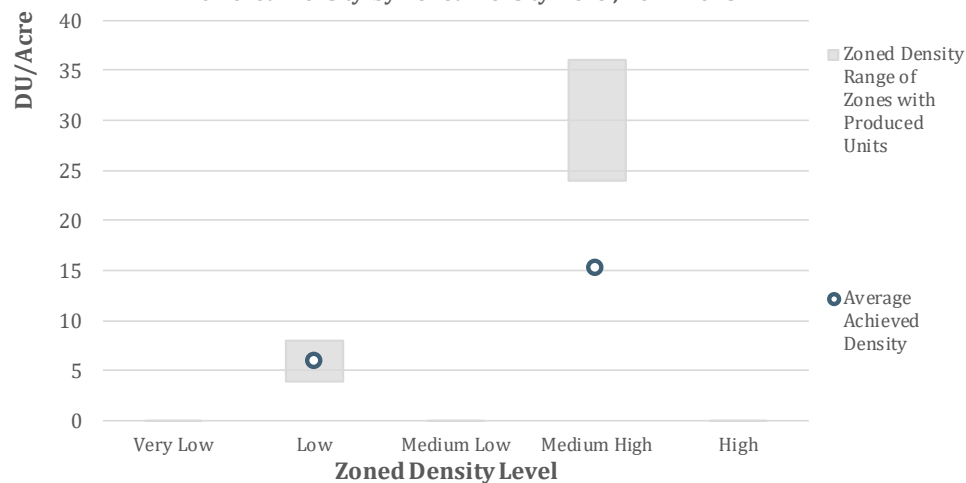
Since 2006, Maple Valley has grown at 239% of the pace needed to achieve its 2035 housing growth target of 2,088 units. During this period, the total number of housing units in Maple Valley grew by roughly 30%. At this current rate, Maple Valley is over the production pace needed to meet its 2035 growth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

Residential Achieved Densities

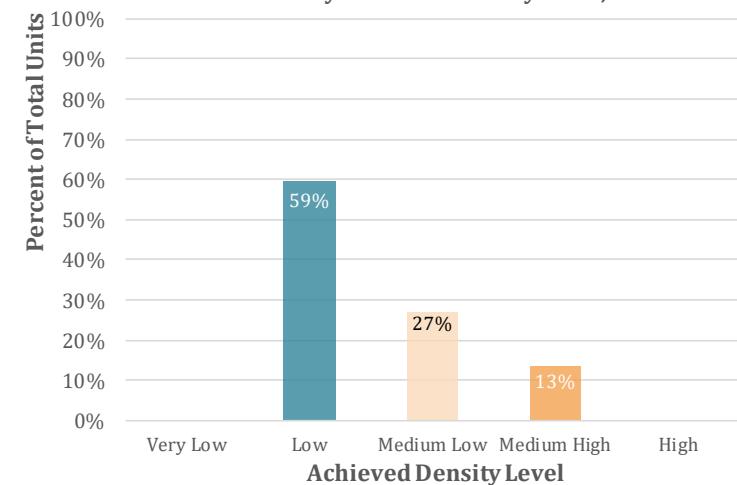
Zoned Density (du/acre)	Gross Area (acres)	Critical Areas (acres)	Public Purpose (acres)	ROWs (acres)	Net Area (acres)	Total Units	Achieved Density (DU/acre)
Very Low	0 - 4 du/acre	0.0	0.0	0.0	0.0	0	
Low	4 - 10 du/acre	126.9	30.6	0.1	0.2	96.0	5.8
Medium Low	10 - 24 du/acre	0.0	0.0	0.0	0.0	0	
Medium High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

Achieved Density by Zoned Density Level, 2012-2018

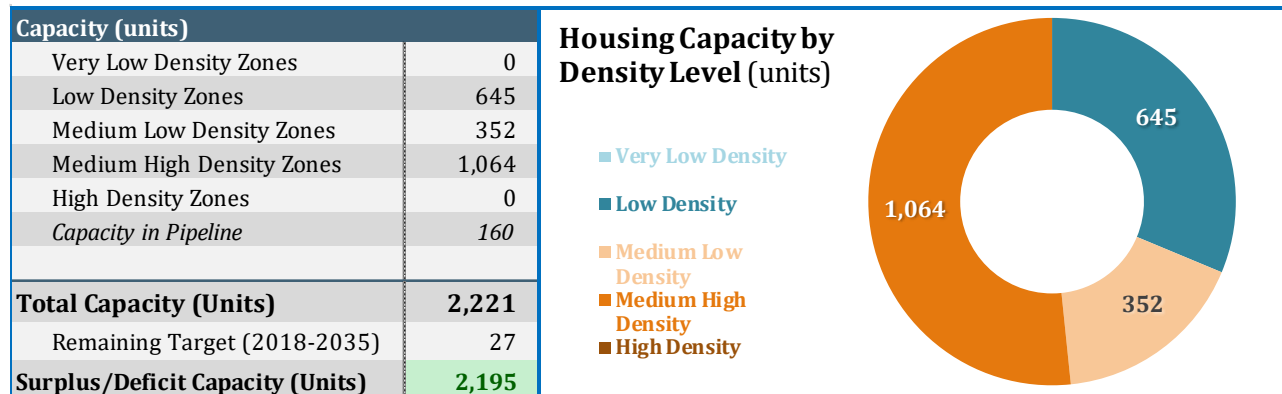


Permitted Units by Achieved Density Level, 2012-2018

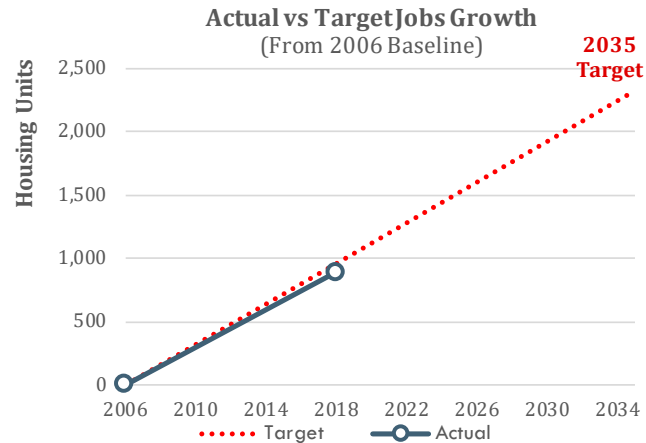


Maple Valley - Residential Land Supply and Capacity

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	0.61	0.00	0.00	0.10		0.43		0
Low Density	Vacant Subtotal				9.74	5.0% - 7.0%	29.94	5.4 / 7.4	186
	Redev Subtotal				33.79	5.0% - 7.0%	103.96	5.4 / 7.4	459
	Subtotal	202.24	12.99	0.00	43.53		133.90		645
Medium Low Density	Vacant Subtotal				0.00	12.0% - 20.0%	0.00	12.0 / 18.0	0
	Redev Subtotal				11.78	12.0% - 20.0%	42.19	12.0 / 18.0	352
	Subtotal	62.87	0.00	0.00	11.78		42.19		352
Medium High Density	Vacant Subtotal				3.51	12.0% - 20.0%	15.80	24.0 / 24.6	388
	Redev Subtotal				6.12	12.0% - 20.0%	27.55	24.0 / 24.6	676
	Subtotal	60.20	0.00	0.00	9.63		43.35		1,064
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				13.26		45.81		574
	Redev Total				51.78		174.07		1,487
	Total	325.92	12.99	0.00	65.04		219.87		2,061



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

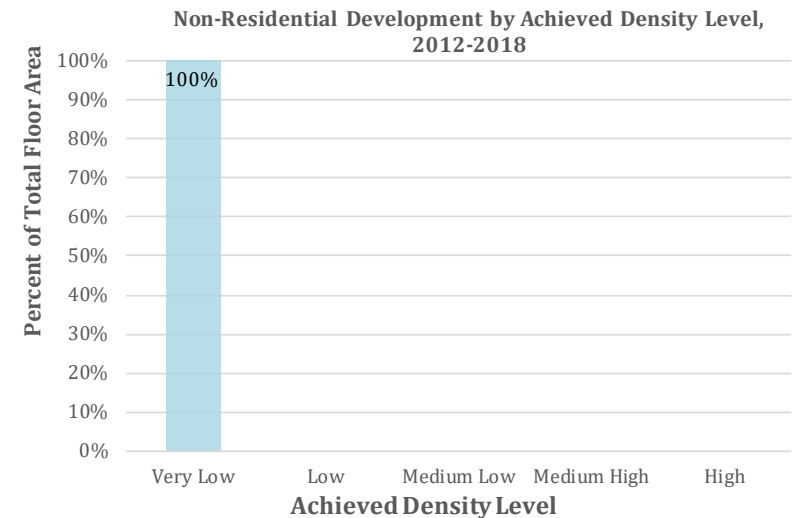
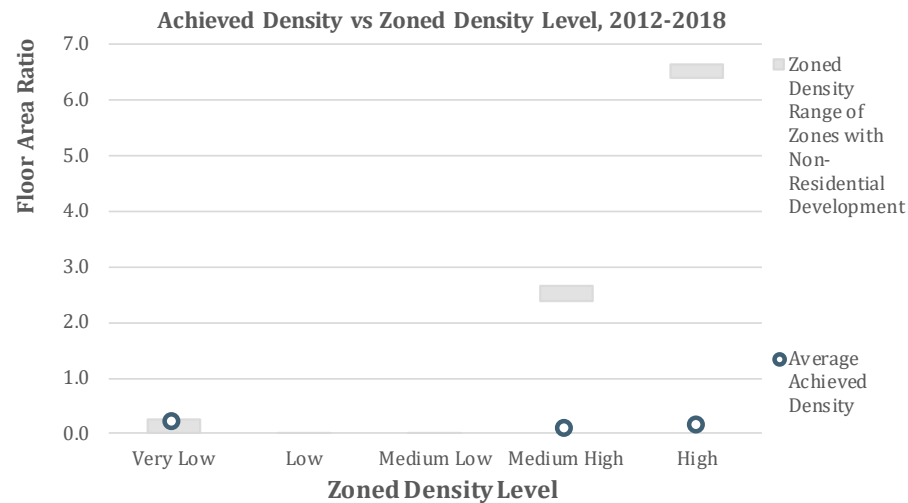
% of Pace Needed to Achieve 2035 Jobs Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Rate Needed to Meet 2035 Target
93.0%	2.02%	1.74%

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 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	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



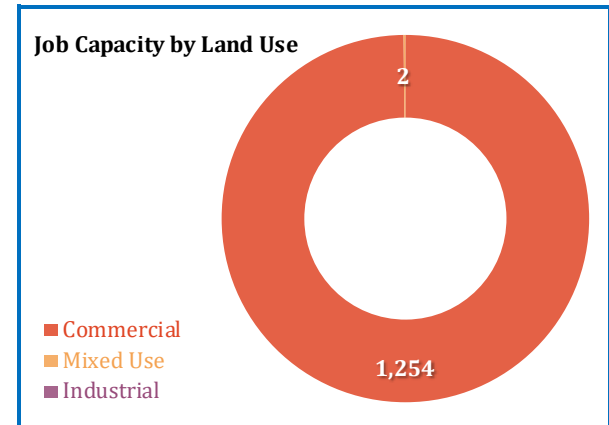
Maple Valley - Commercial/Industrial Land Supply and Job Capacity

Land Supply	Gross Area (acres)	Critical Areas (acres)	ROWs (acres)	Public Purpose (acres)	Initial Land Supply	Market Factor	Buildable Area (acres)
Vacant / Redev.							
Commercial	105.2	10.8	6.6	8.5	79.3	12% - 16%	66.6
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	105.8	10.8	6.7	8.6	79.8		67.0

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	2.54	0.03 / 0.29	0.00	0.55	500	1,103
Redevelopable	2.36	0.03 / 0.29	0.12	0.08	500	151
Commercial Total	4.89	0.03 / 0.29	0.12	0.63	500	1,254
Mixed-Use						
Vacant	0.00	0.08	0.00	0.00	700	0
Redevelopable	0.02	0.08	0.00	0.00	700	2
Mixed Use Total	0.02	0.08	0.00	0.00	700	2
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	4.89	0.03 / 0.29	0.69	0.63	500	1,254
Mixed Use	0.02	0.08	0.91	0.00	700	2
Industrial	0.00	0.00	0.26	0.00	0	0
<i>Job Capacity in Pipeline</i>						<i>528</i>
City Total	4.91	0.29	1.86	0.63	0 / 700	1,784

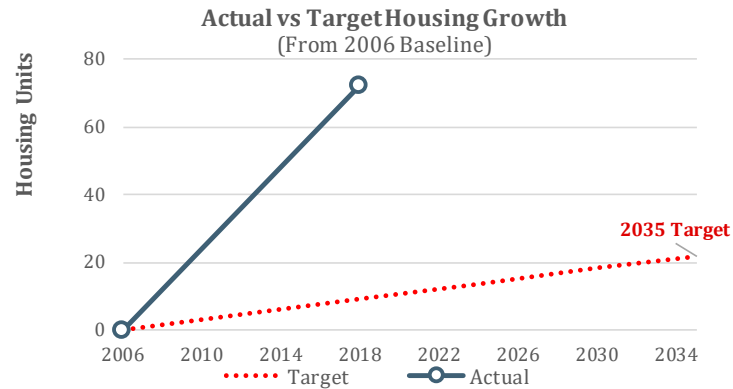
*Certain zones grouped as commercial allow for industrial use.

Job Capacity by Assumed Density Level	#	%
Very Low Density	1,256	100%
Low Density	0	0%
Medium Low Density	0	0%
Medium High Density	0	0%
High Density	0	0%
<i>Capacity in Pipeline</i>		<i>528</i>
Total Capacity (jobs)		1,784
Remaining Target (2018-2035)		1,427
Surplus/Deficit Capacity (jobs)		357



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

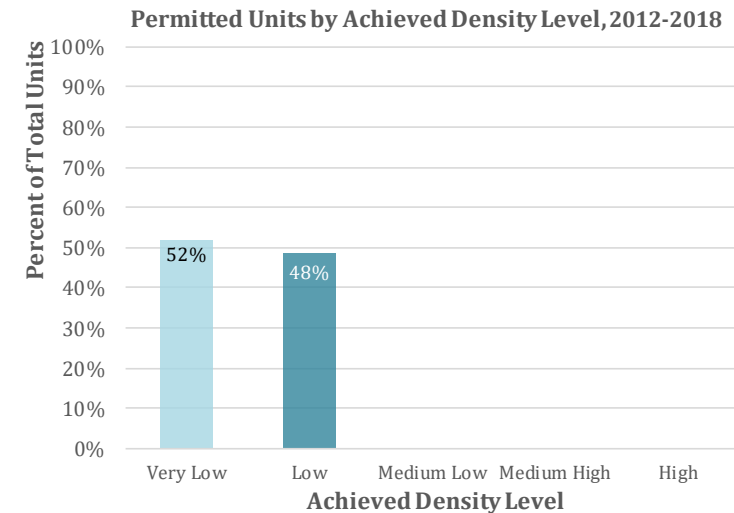
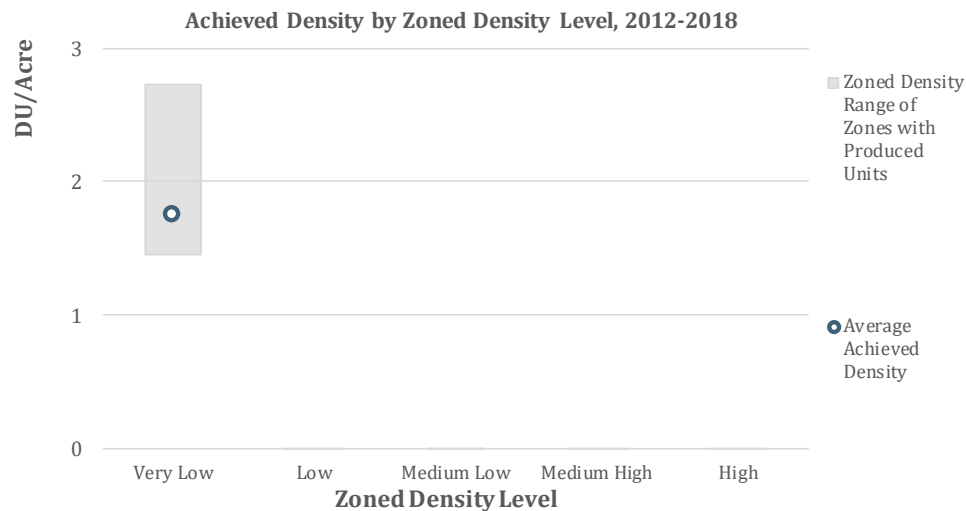
% of Pace Needed to Achieve 2035 Housing Growth Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Needed to Meet 2035 Target
794.6%	0.51%	Met Target

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

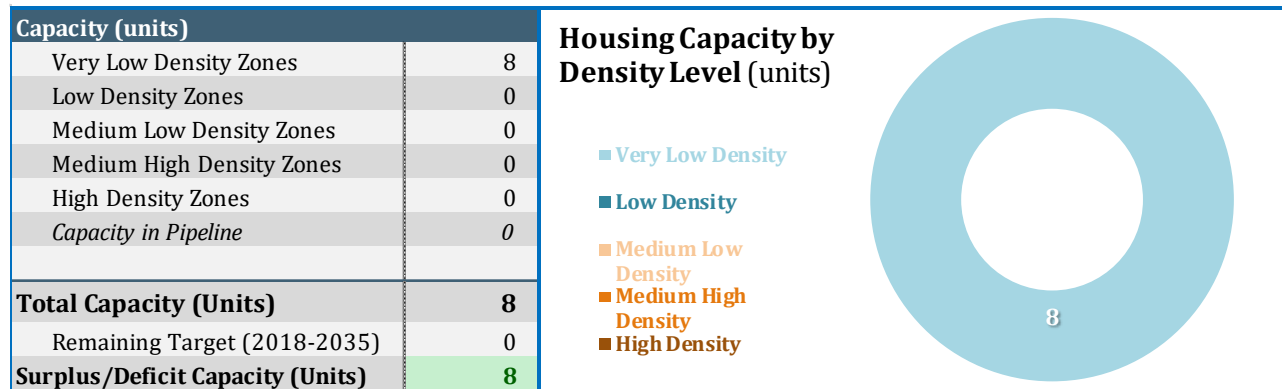
Zoned Density (du/acre)	Gross Area (acres)	Critical Areas (acres)	Public Purpose (acres)	ROWs (acres)	Net Area (acres)	Total Units	Achieved Density (DU/acre)
Very Low 0 - 4 du/acre	55.3	4.5	0.0	0.0	50.9	89	1.7
Low 4 - 10 du/acre	0.0	0.0	0.0	0.0	0.0	0	
Medium Low 10 - 24 du/acre	0.0	0.0	0.0	0.0	0.0	0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

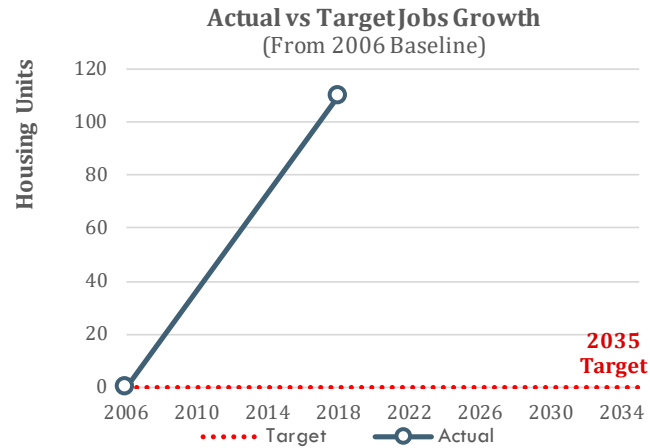


Medina - Residential Land Supply and Capacity

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



Medina - Employment Growth and Commercial/Industrial Development Trends



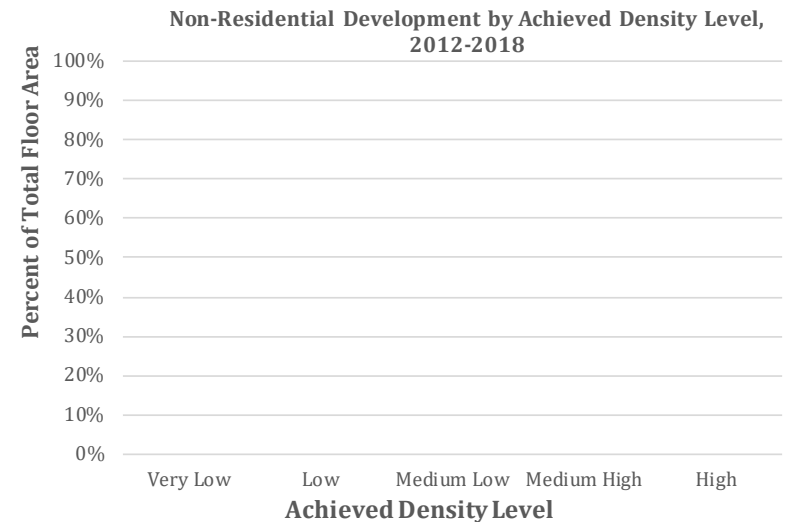
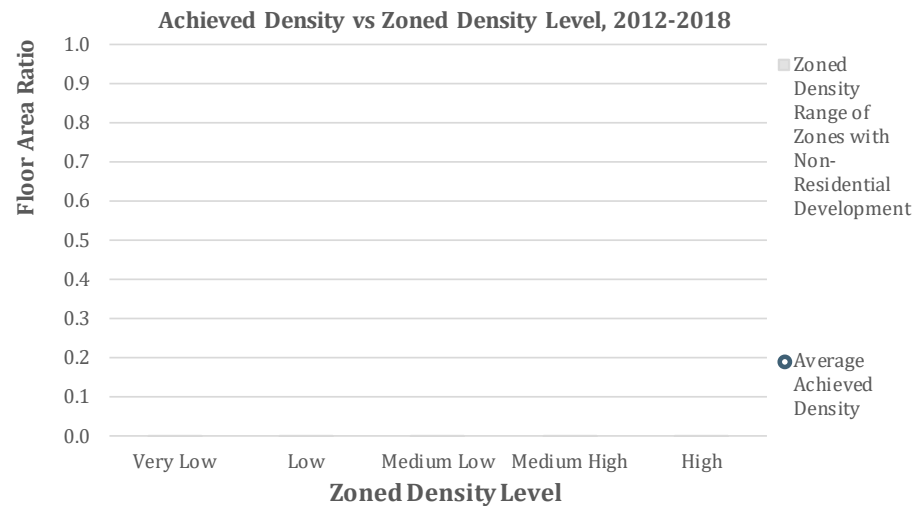
Medina Jobs Growth Target: 2006-2035		0
2006 Jobs (PSRC)		409
2018 Jobs (PSRC)		519
Total Jobs Growth		110
Remaining 2035 Target		Not Applicable
% of Pace Needed to Achieve 2035 Jobs Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Rate Needed to Meet 2035 Target
Not Applicable	2.00%	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

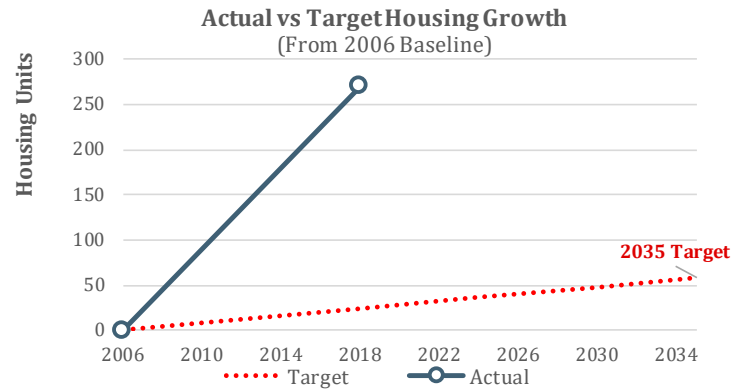


Medina - Commercial/Industrial Land Supply and Job Capacity

(no job capacity in Medina)

City of Milton

Housing Growth and Residential Development Trends



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

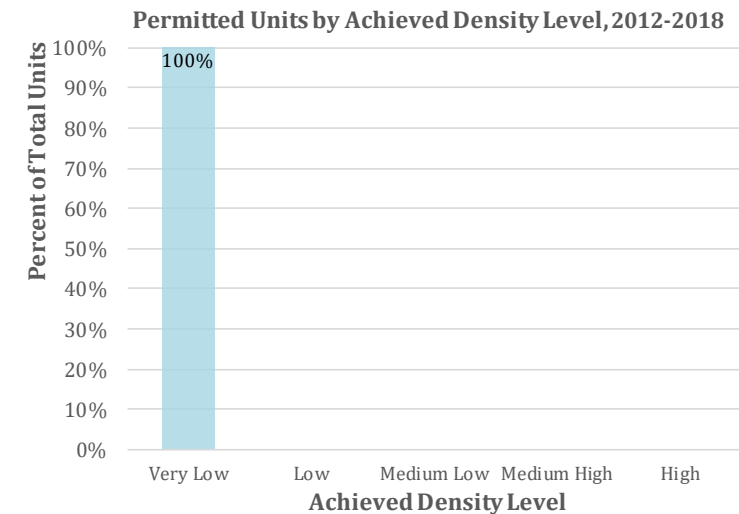
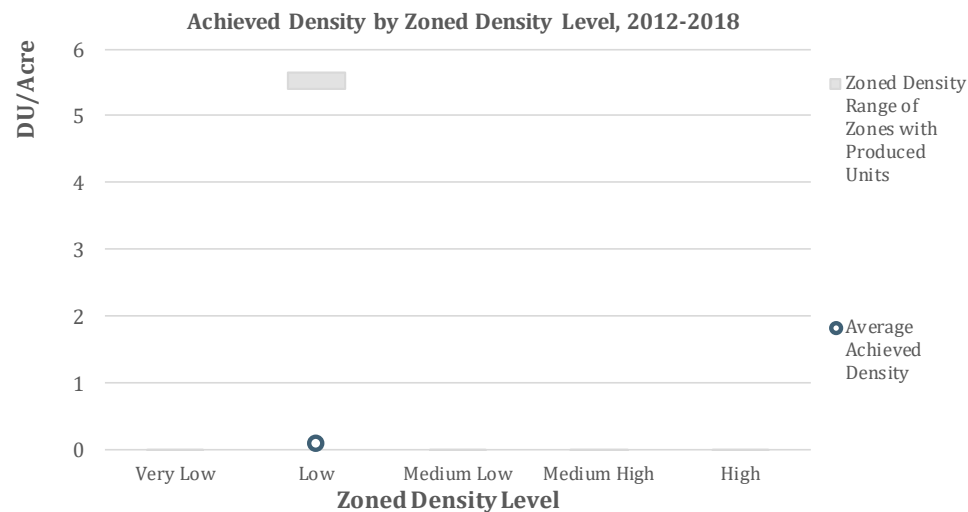
% of Pace Needed to Achieve 2035 Housing Growth Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Needed to Meet 2035 Target
1128.6%	5.04%	Met Target

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

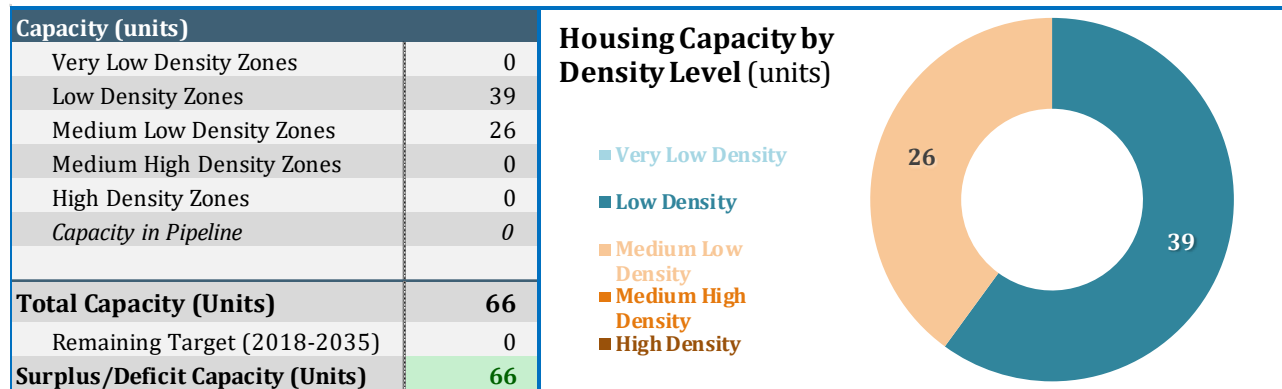
Zoned Density (du/acre)	Gross Area (acres)	Critical Areas (acres)	Public Purpose (acres)	ROWs (acres)	Net Area (acres)	Total Units	Achieved Density (DU/acre)
Very Low	0 - 4 du/acre	0.0	0.0	0.0	0.0	0	
Low	4 - 10 du/acre	14.0	0.0	0.0	14.0	1	0.1
Medium Low	10 - 24 du/acre	0.0	0.0	0.0	0.0	0	
Medium High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

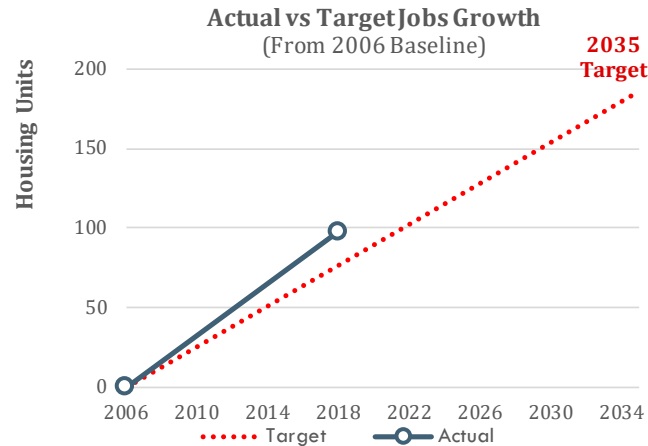


Milton - Residential Land Supply and Capacity

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



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

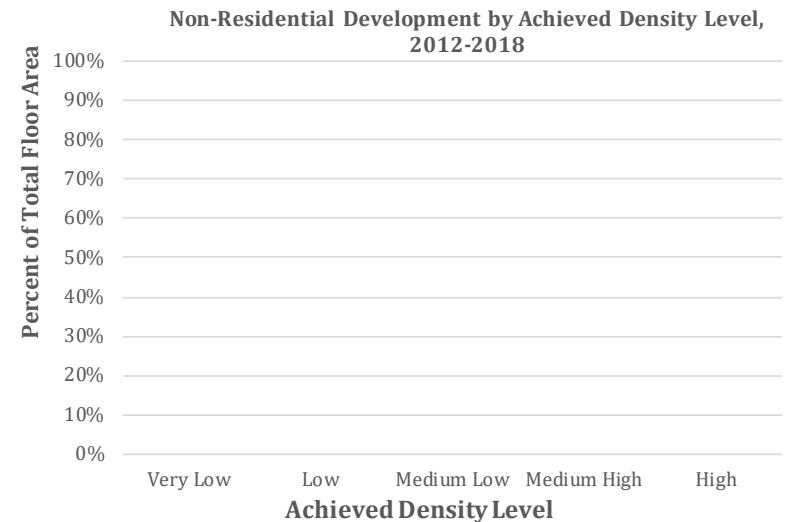
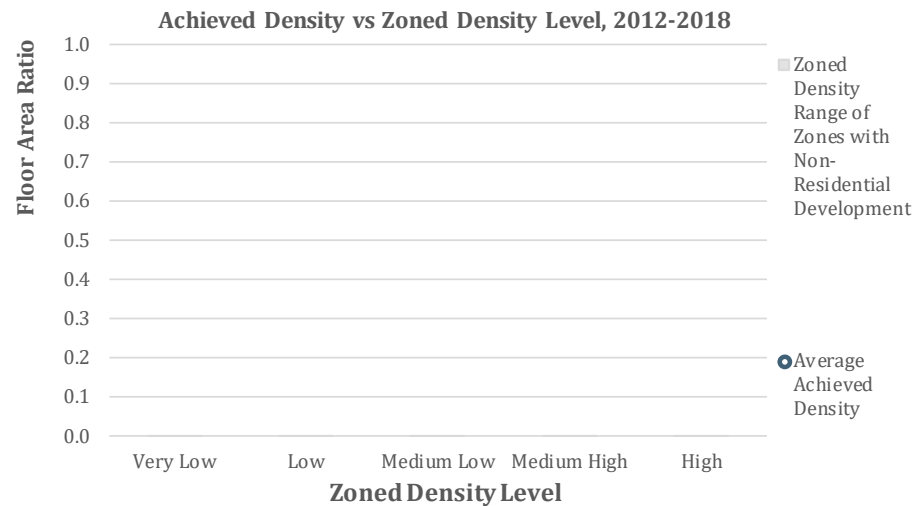
% of Pace Needed to Achieve 2035 Jobs Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Rate Needed to Meet 2035 Target
127.6%	15.49%	3.28%

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 3.3% 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



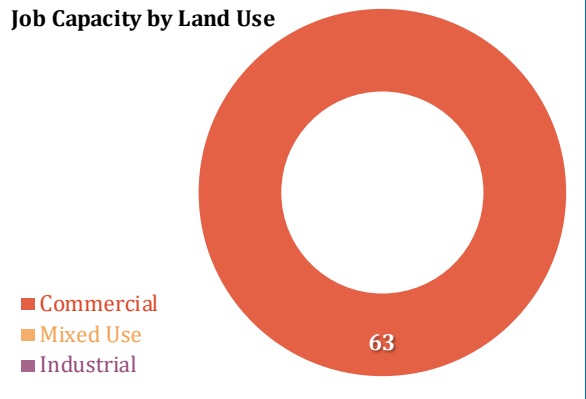
Milton - Commercial/Industrial Land Supply and Job Capacity

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
<i>Job Capacity in Pipeline</i>						<i>1,150</i>
City Total	0.11	0.25	1.86	0.03	0 / 450	1,213

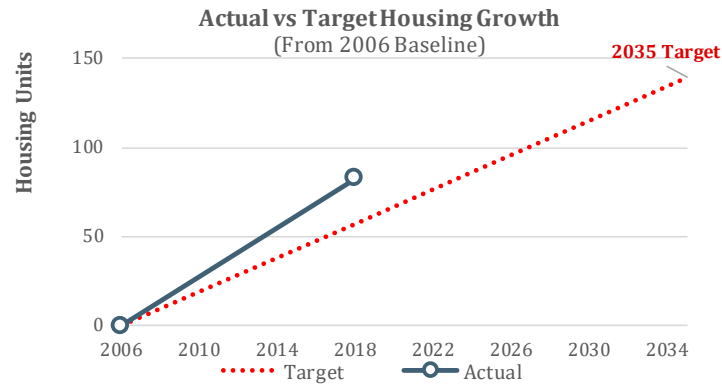
Job Capacity by Assumed Density Level	#	%
Very Low Density	63	100%
Low Density	0	0%
Medium Low Density	0	0%
Medium High Density	0	0%
High Density	0	0%
<i>Capacity in Pipeline</i>		<i>1,150</i>
Total Capacity (jobs)		1,213
Remaining Target (2018-2035)		88
Surplus/Deficit Capacity (jobs)		1,125

Job Capacity by Land Use



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

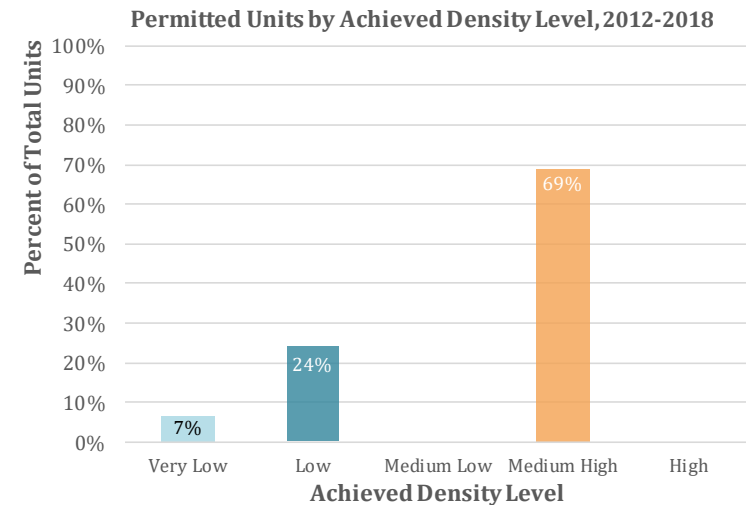
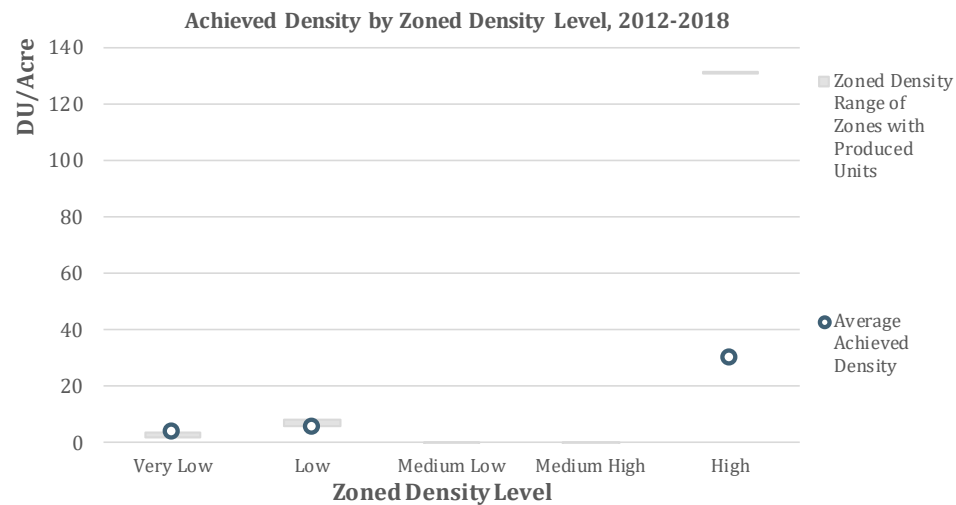
% of Pace Needed to Achieve 2035 Housing Growth Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Needed to Meet 2035 Target
143.8%	0.24%	0.11%

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 reach its remaining target by 2035.

Residential Achieved Densities

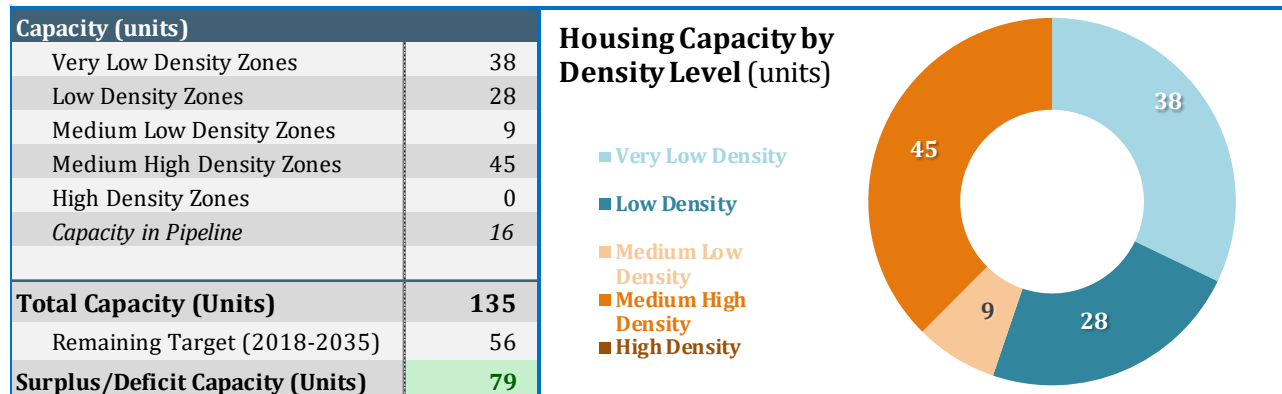
Zoned Density (du/acre)		Gross Area (acres)	Critical Areas (acres)	Public Purpose (acres)	ROWs (acres)	Net Area (acres)	Total Units	Achieved Density (DU/acre)
Very Low	0 - 4 du/acre	6.5	4.6	0.0	0.0	1.9	7	3.7
Low	4 - 10 du/acre	0.4	0.0	0.0	0.0	0.4	2	5.0
Medium Low	10 - 24 du/acre	0.0	0.0	0.0	0.0	0.0	0	
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

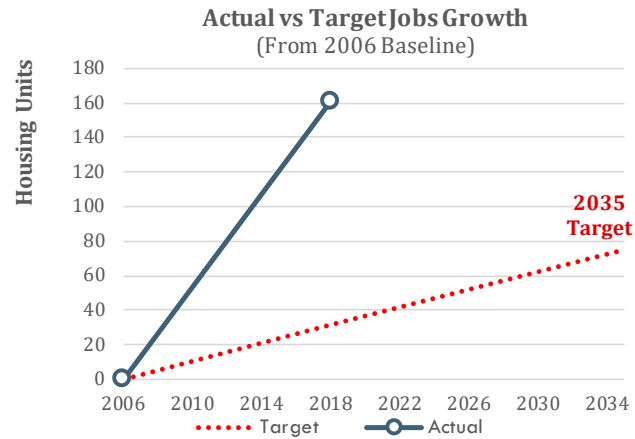


Normandy Park - Residential Land Supply and Capacity

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				9.99	41.0% - 41.0%	15.09	2.0 / 3.3	38
	Redev Subtotal				6.96	41.0% - 41.0%	10.51	2.0 / 3.3	0
	Subtotal	132.96	19.34	40.12	16.95		25.61		38
Low Density	Vacant Subtotal				1.38	41.0% - 41.0%	2.09	5.0 / 8.0	10
	Redev Subtotal				2.21	41.0% - 41.0%	3.35	5.0 / 8.0	17
	Subtotal	15.78	0.00	0.48	3.60		5.43		28
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	0.72	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	1.83	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				11.37		17.19		49
	Redev Total				9.43		15.91		70
	Total	151.29	19.34	40.60	20.80		33.10		119



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

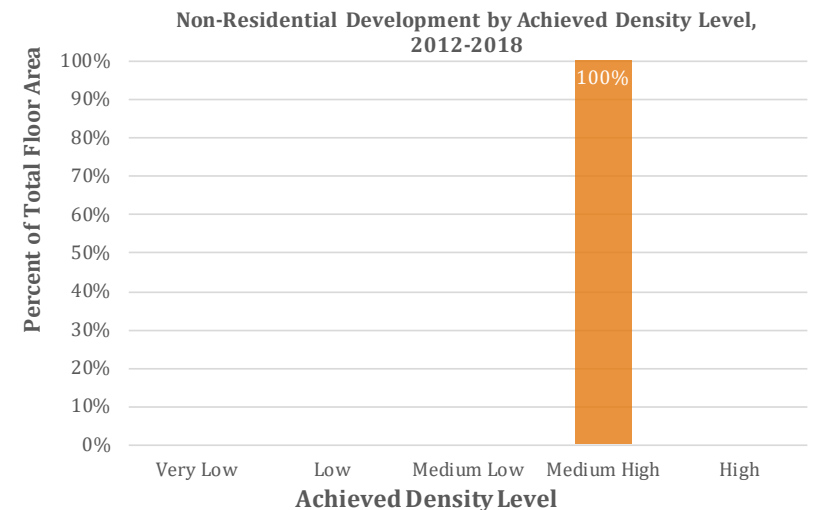
% of Pace Needed to Achieve 2035 Jobs Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Rate Needed to Meet 2035 Target
516.0%	1.59%	Met Target

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



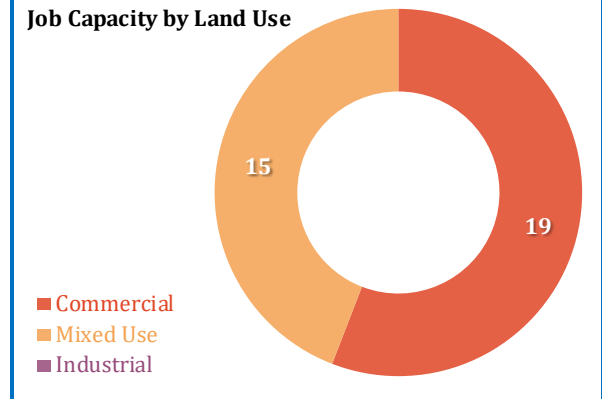
Normandy Park - Commercial/Industrial Land Supply and Job Capacity

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
<i>Job Capacity in Pipeline</i>						<i>0</i>
City Total	0.09	0.28	1.86	0.01	0 / 250	35

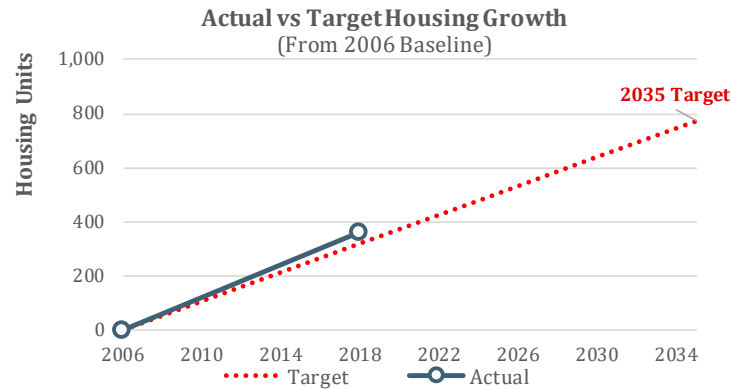
Job Capacity by Assumed Density Level	#	%
Very Low Density	35	100%
Low Density	0	0%
Medium Low Density	0	0%
Medium High Density	0	0%
High Density	0	0%
<i>Capacity in Pipeline</i>		<i>0</i>
Total Capacity (jobs)		35
Remaining Target (2018-2035)		0
Surplus/Deficit Capacity (jobs)		35

Job Capacity by Land Use



City of North Bend

Housing Growth and Residential Development Trends



North Bend Housing Growth Target: 2006-2035	
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	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Needed to Meet 2035 Target
113.0%	0.86%	0.62%

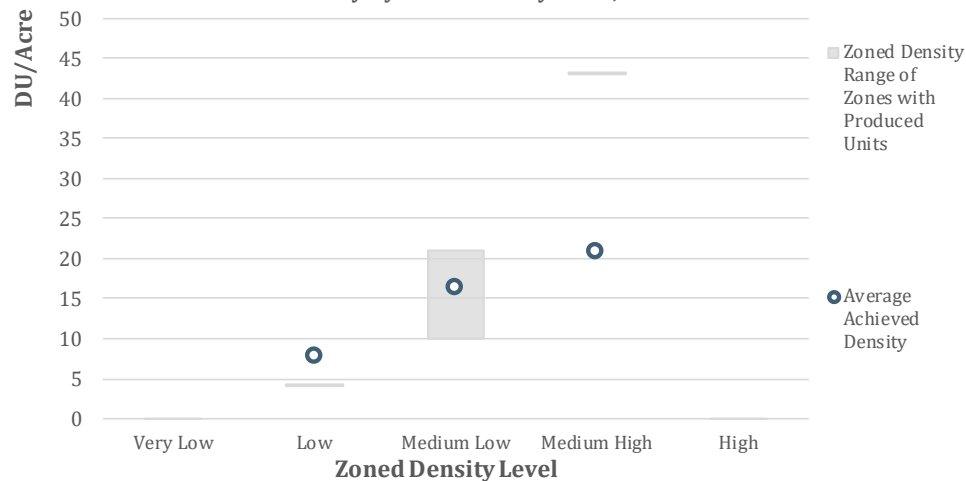
Since 2006, North Bend has grown at 113% of the pace needed to achieve its 2035 housing growth target of 771 units. During this period, the total number of housing units in North Bend grew by roughly 11%. At this current rate, North Bend is over the production pace needed to meet its 2035 growth target, and needs to grow at an annual rate of 0.6% to reach its remaining target by 2035.

Residential Achieved Densities

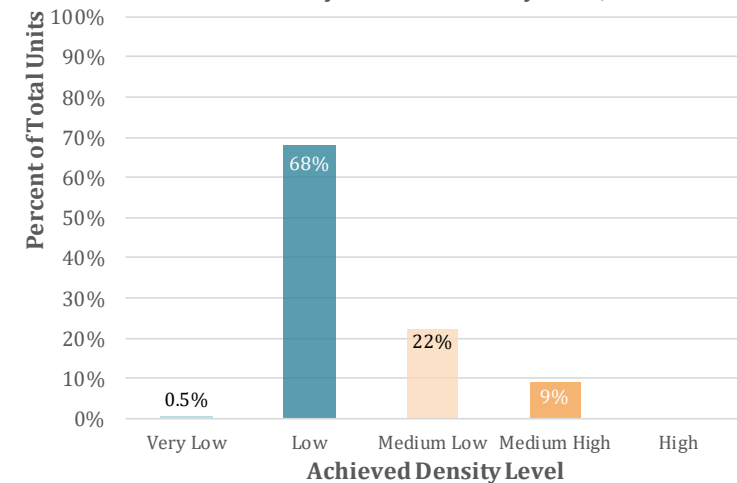
Zoned Density (du/acre)	Gross Area (acres)	Critical Areas (acres)	Public Purpose (acres)	ROWs (acres)	Net Area (acres)	Total Units	Achieved Density (DU/acre)
Very Low	0 - 4 du/acre	0.0	0.0	0.0	0.0	0	
Low	4 - 10 du/acre	159.3	26.0	23.7	76.7	592	7.7
Medium Low	10 - 24 du/acre	18.5	0.0	3.1	11.9	194	16.3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

Achieved Density by Zoned Density Level, 2012-2018



Permitted Units by Achieved Density Level, 2012-2018

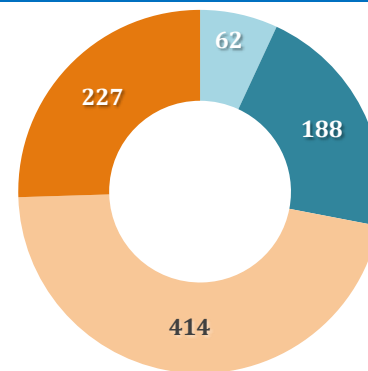
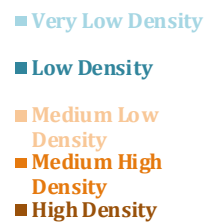


North Bend - Residential Land Supply and Capacity

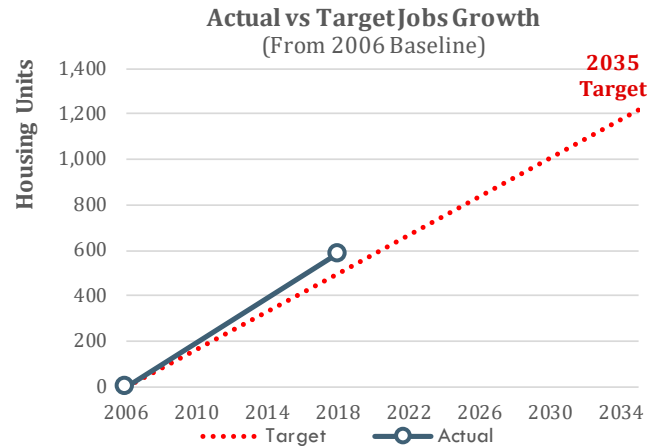
Assumed Density Level	Vacant/Redevelopable	Gross Acres	Critical Areas	Infrastructure Constrained Area	ROW & Public Purpose Discount	Market Factor (low/high)	Net Available Acres	Assumed Densities (low/high - units/acre)	Net Capacity (units)
Very Low Density	Vacant Subtotal				11.01	10.0% - 30.0%	25.07	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

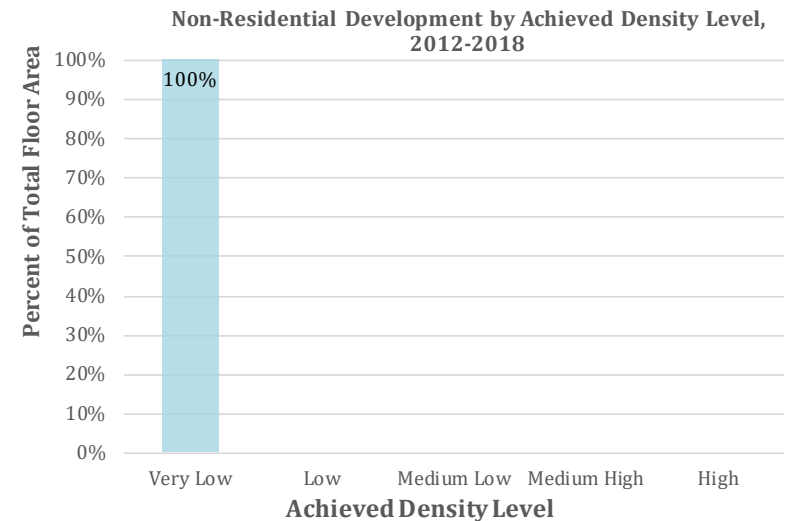
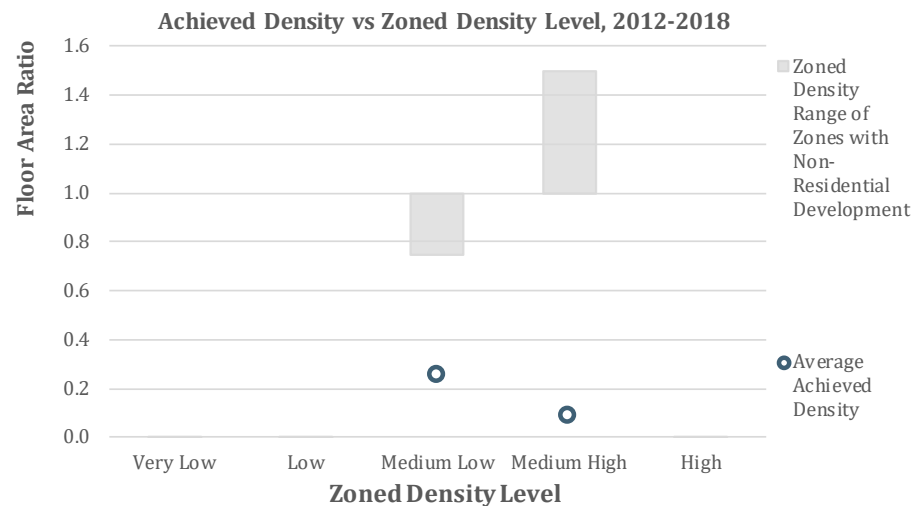
% of Pace Needed to Achieve 2035 Jobs Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Rate Needed to Meet 2035 Target
117.1%	1.66%	1.03%

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% 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

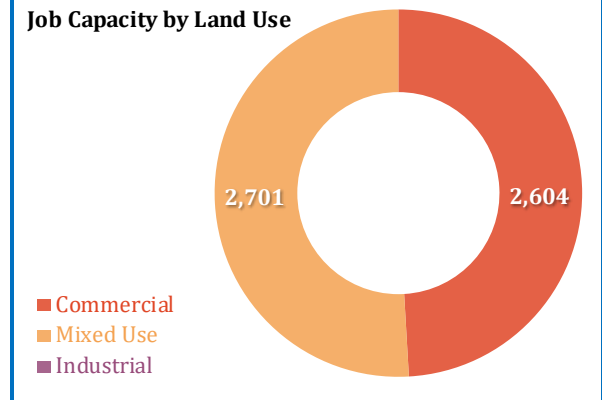
Land Supply	Gross Area (acres)	Critical Areas (acres)	ROWs (acres)	Public Purpose (acres)	Initial Land Supply	Market Factor	Buildable Area (acres)
Vacant / Redev.							
Commercial	129.1	89.5	3.2	3.2	33.3	20%	25.4
Mixed Use	59.5	0.0	4.8	4.8	50.0	25%	35.1
Industrial	0.0	0.0	0.0	0.0	0.0	0%	0.0
Non-Res 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	1,019
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
<i>Job Capacity in Pipeline</i>						453
City Total	5.22	1.50	1.86	2.51	0 / 800	5,759

*Certain zones grouped as commercial allow for industrial use.

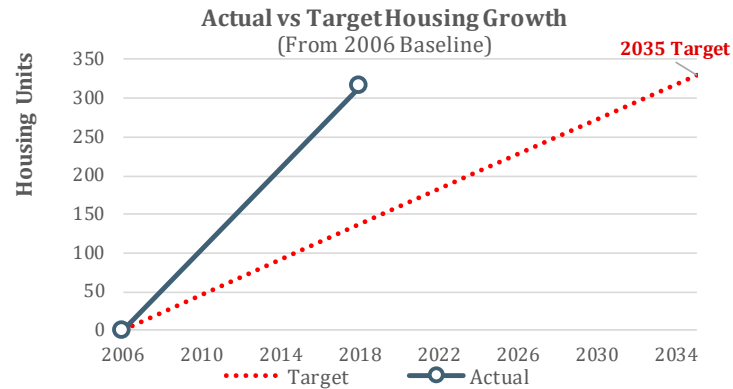
Job Capacity by Assumed Density Level	#	%
Very Low Density	1,234	23%
Low Density	928	18%
Medium Low Density	2,507	47%
Medium High Density	636	12%
High Density	0	0%
<i>Capacity in Pipeline</i>		453
Total Capacity (jobs)		5,759
Remaining Target (2018-2035)		628
Surplus/Deficit Capacity (jobs)		5,131

Job Capacity by Land Use



City of Pacific

Housing Growth and Residential Development Trends



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

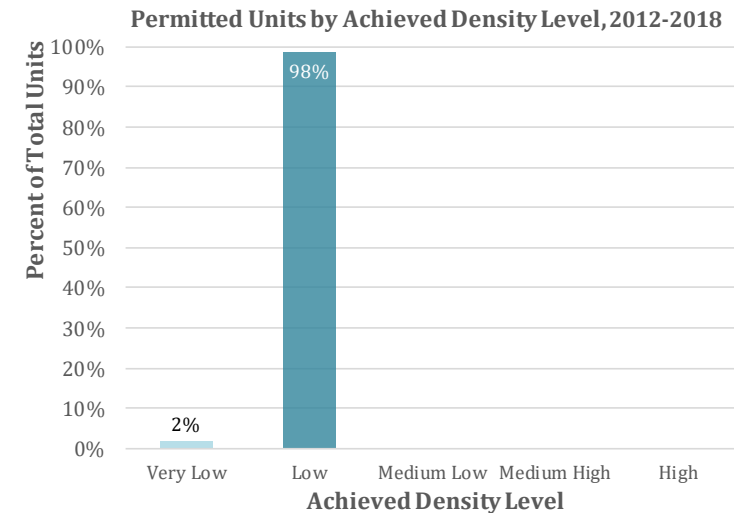
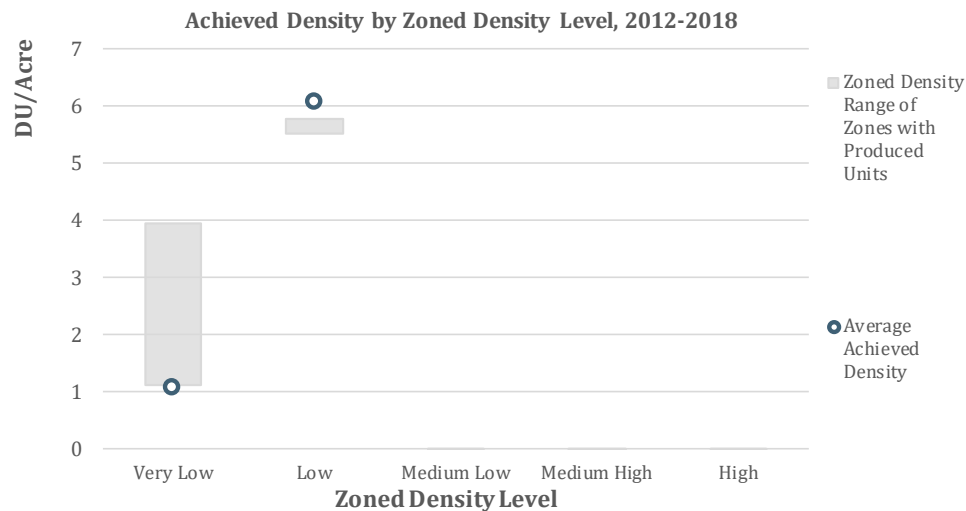
% of Pace Needed to Achieve 2035 Housing Growth Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Needed to Meet 2035 Target
230.9%	1.15%	0.04%

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% to reach its remaining target by 2035.

Residential Achieved Densities

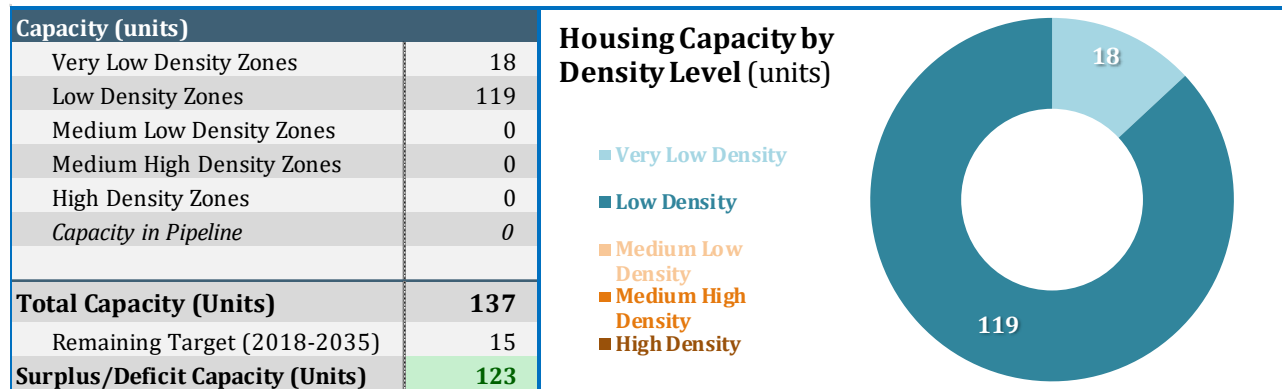
Zoned Density (du/acre)	Gross Area (acres)	Critical Areas (acres)	Public Purpose (acres)	ROWs (acres)	Net Area (acres)	Total Units	Achieved Density (DU/acre)
Very Low	0 - 4 du/acre	3.6	1.7	0.0	0.0	1.9	2
Low	4 - 10 du/acre	20.3	0.9	0.0	0.0	19.4	117
Medium Low	10 - 24 du/acre	0.0	0.0	0.0	0.0	0.0	0
Medium 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

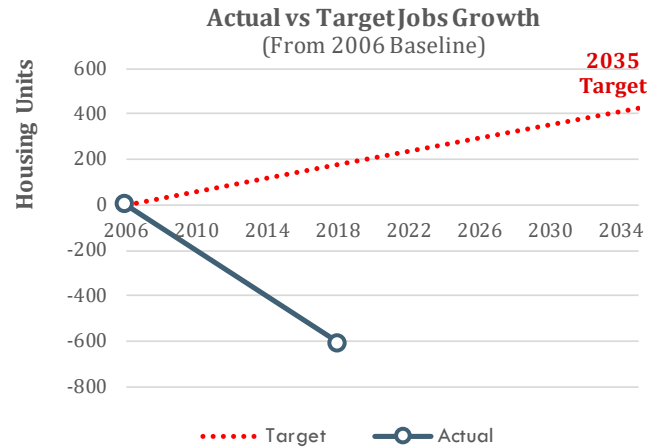


Pacific - Residential Land Supply and Capacity

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



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	429

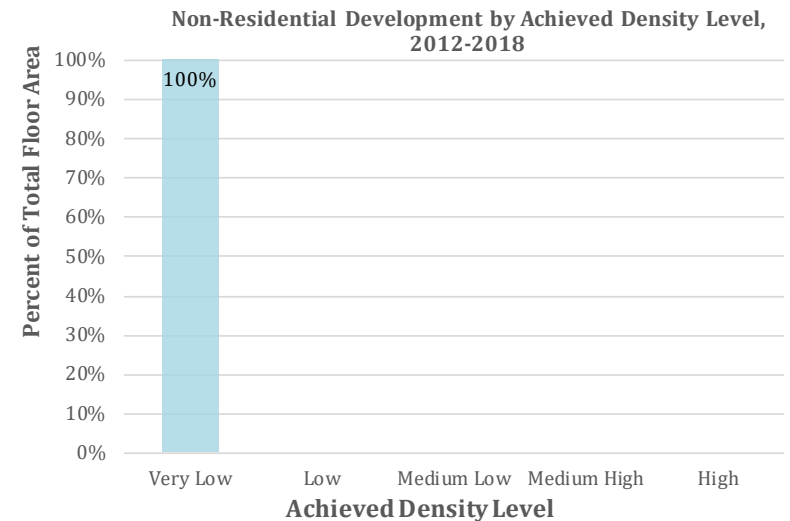
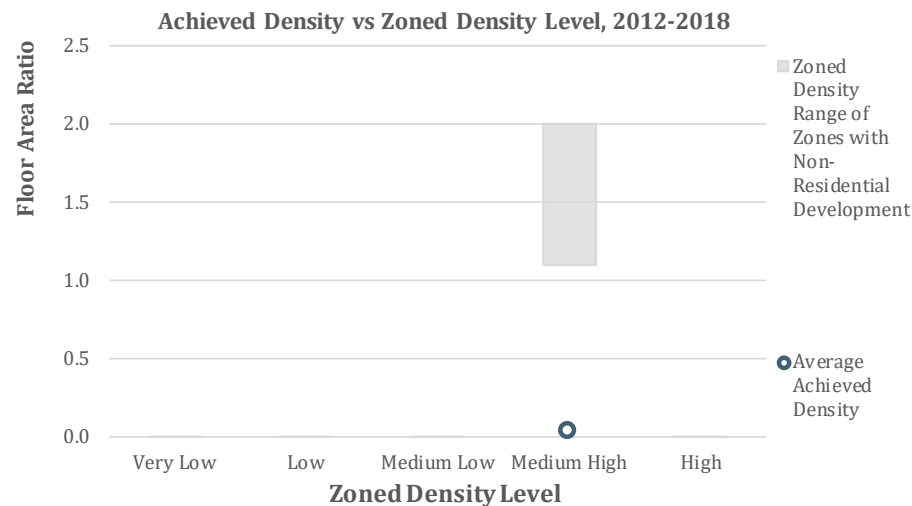
% of Pace Needed to Achieve 2035 Jobs Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Rate Needed to Meet 2035 Target
-342.9%	-4.46%	4.88%

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 4.9% 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	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



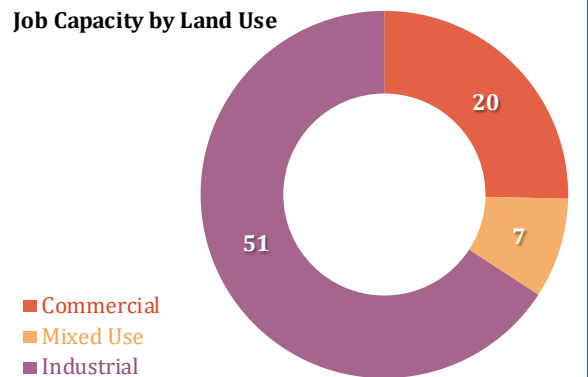
Pacific - Commercial/Industrial Land Supply and Job Capacity

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
<i>Job Capacity in Pipeline</i>						<i>0</i>
City Total	0.29	0.25 / 0.30	1.86	0.07	450 / 1200	77

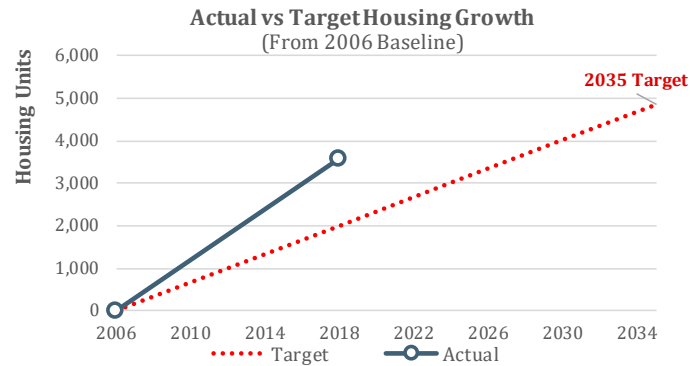
Job Capacity by Assumed Density Level	#	%
Very Low Density	77	100%
Low Density	0	0%
Medium Low Density	0	0%
Medium High Density	0	0%
High Density	0	0%
<i>Capacity in Pipeline</i>		<i>0</i>
Total Capacity (jobs)		77
Remaining Target (2018-2035)		1,038
Surplus/Deficit Capacity (jobs)		-961

Job Capacity by Land Use



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

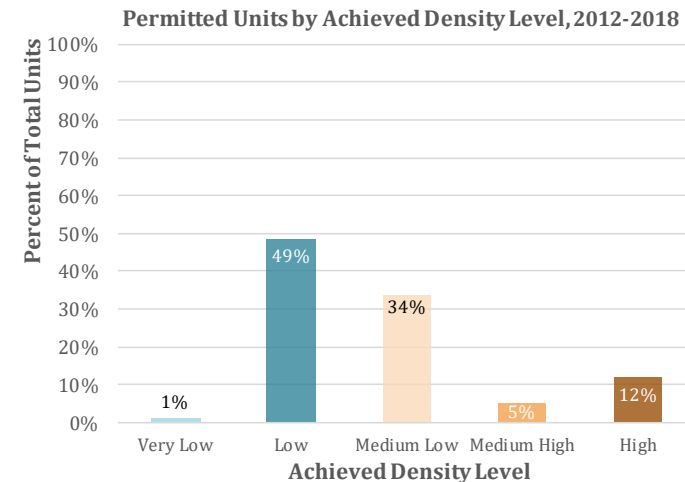
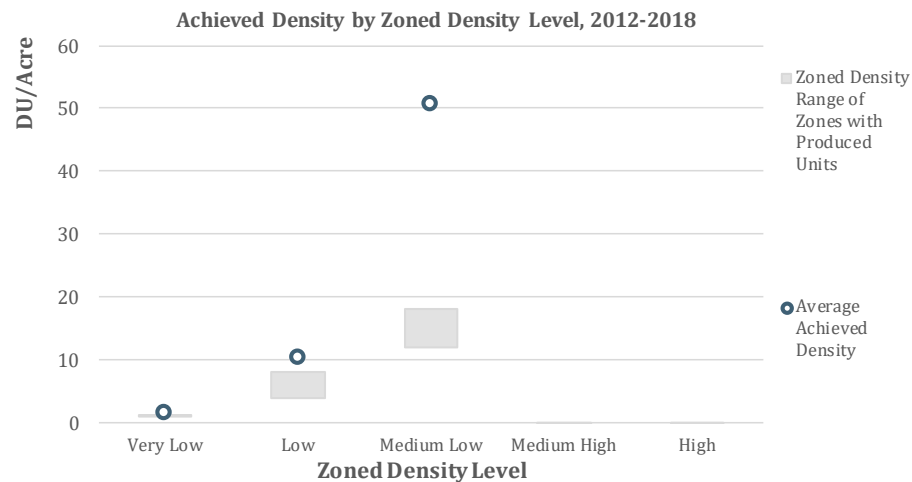
% of Pace Needed to Achieve 2035 Housing Growth Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Needed to Meet 2035 Target
178.7%	1.51%	0.33%

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

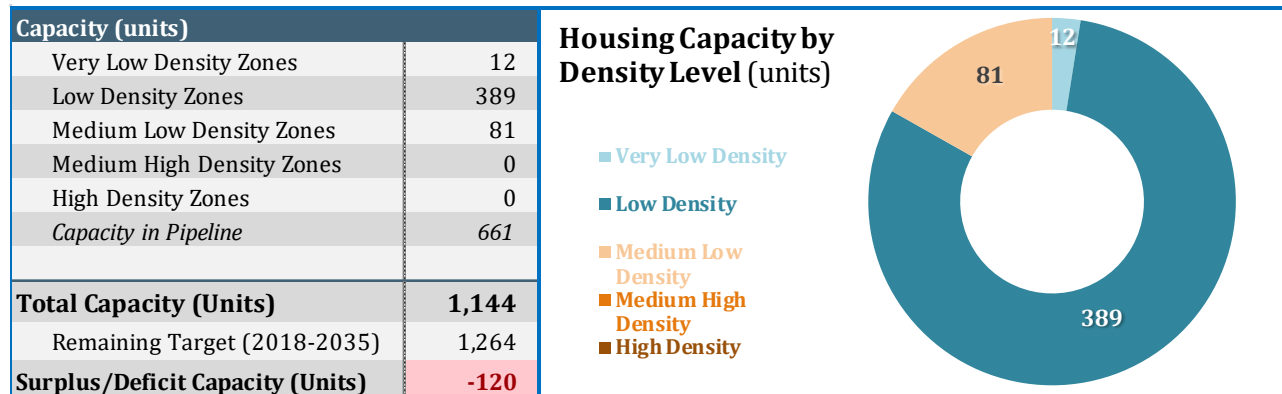
Achieved Density Level	Net Area (acres)	Total Units
Very Low	15.1	21
Low	108.0	917
Medium Low	40.1	631
Medium High	2.2	92
High	2.1	222
Total	167.5	1,883



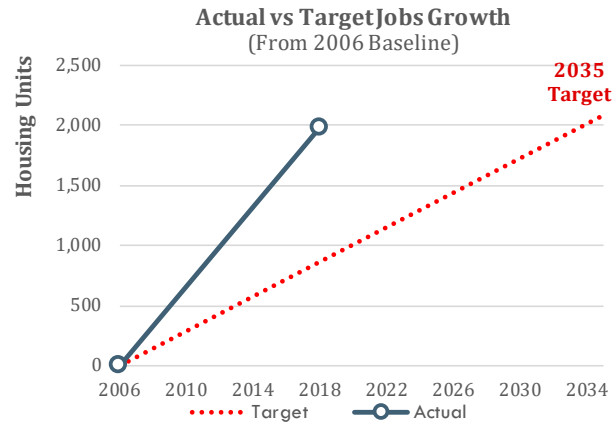
Note: Sammamish includes right-of-way or public purpose areas in the gross site area to calculate the net buildable area. While this report shows achieved density varying from planned density, if you adjust the approach to use Sammamish's formula for net buildable area, the densities are more comparable.

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	2,128.94	852.74	166.21	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	7,729.35	2,223.54	282.52	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	339.26	77.64	63.83	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	10,197.55	3,153.91	512.57	124.32		159.60		483



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

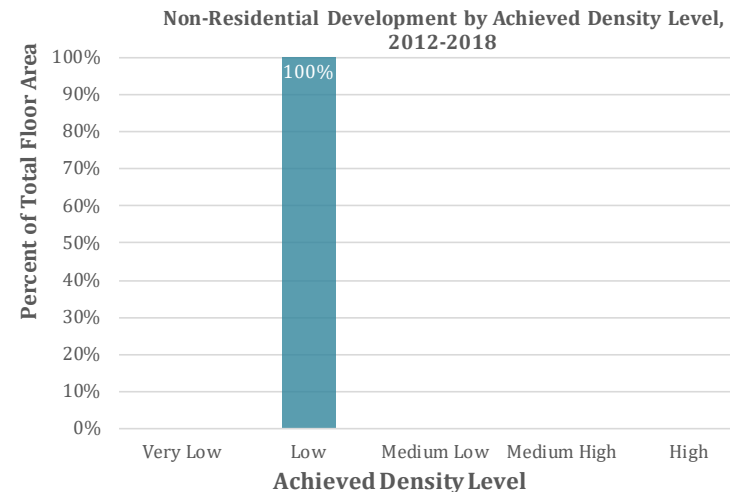
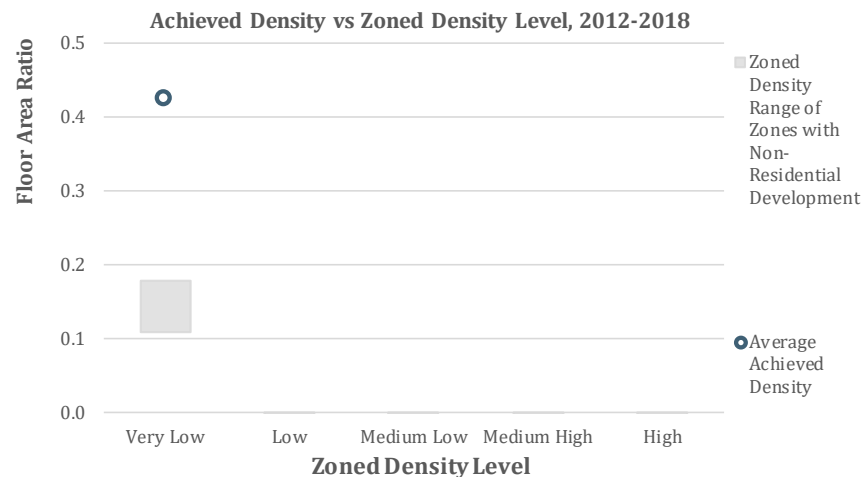
% of Pace Needed to Achieve 2035 Jobs Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Rate Needed to Meet 2035 Target
230.0%	2.34%	0.07%

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



Note: Between 2012-2018, three mixed-use projects were completed in Town Center, some of which included parcels in multiple zones. Densities for all of these projects were guided by a Unified Zone Development Plan which established the level and intensity of new commercial and residential development within the city's Town Center.

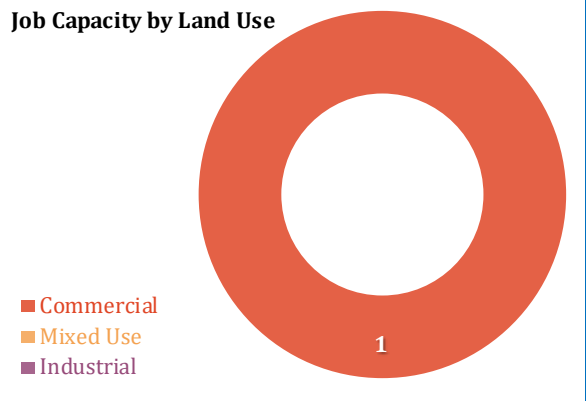
Sammamish - Commercial/Industrial Land Supply and Job Capacity

Land Supply	Gross Area (acres)	Critical Areas (acres)	ROWs (acres)	Public Purpose (acres)	Initial Land Supply	Market Factor	Buildable Area (acres)
Vacant / Redev.							
Commercial	18.5	13.7	0.9	0.8	3.2	50%	0.8
Mixed Use	12.7	12.7	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	31.2	26.4	0.9	0.8	3.2		0.8

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	0.00	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
<i>Job Capacity in Pipeline</i>						304
City Total	0.03	8.00	1.86	0.00	0 / 370	305

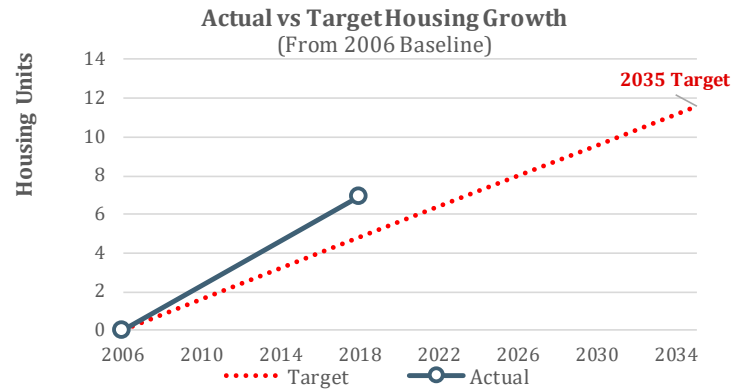
Job Capacity by Assumed Density Level	#	%
Very Low Density	0	0%
Low Density	0	0%
Medium Low Density	1	100%
Medium High Density	0	0%
High Density	0	0%
<i>Capacity in Pipeline</i>		304
Total Capacity (jobs)		305
Remaining Target (2018-2035)		101
Surplus/Deficit Capacity (jobs)		204

Job Capacity by Land Use



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

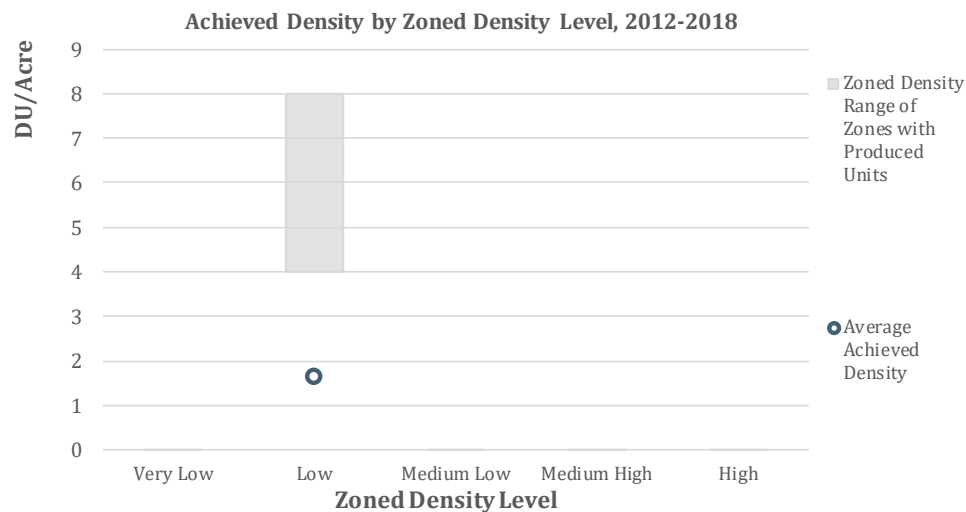
% of Pace Needed to Achieve 2035 Housing Growth Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Needed to Meet 2035 Target
144.1%	0.34%	0.16%

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

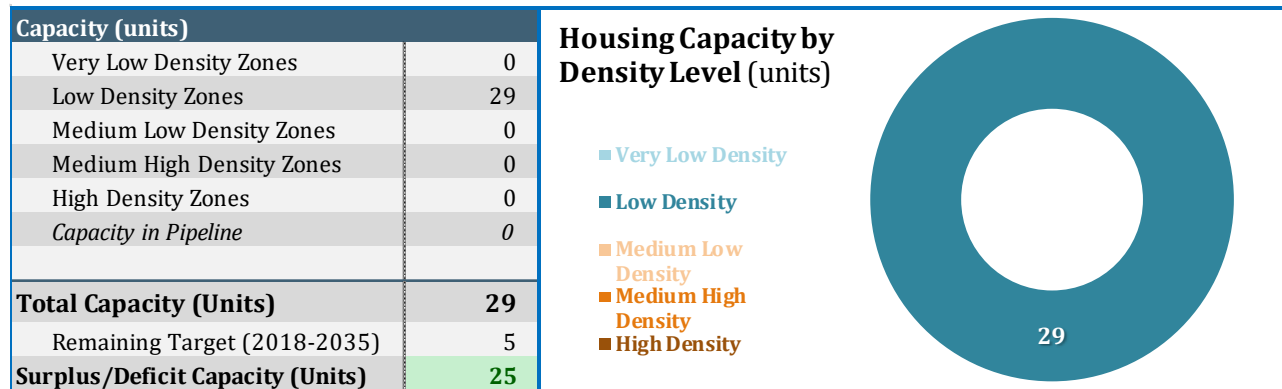
Zoned Density (du/acre)	Gross Area (acres)	Critical Areas (acres)	Public Purpose (acres)	ROWs (acres)	Net Area (acres)	Total Units	Achieved Density (DU/acre)
Very Low	0 - 4 du/acre	0.0	0.0	0.0	0.0	0	
Low	4 - 10 du/acre	1.2	0.0	0.0	1.2	2	1.6
Medium Low	10 - 24 du/acre	0.0	0.0	0.0	0.0	0	
Medium High	24 - 48 du/acre	0.0	0.0	0.0	0.0	0	
High	48 & up du/acre	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

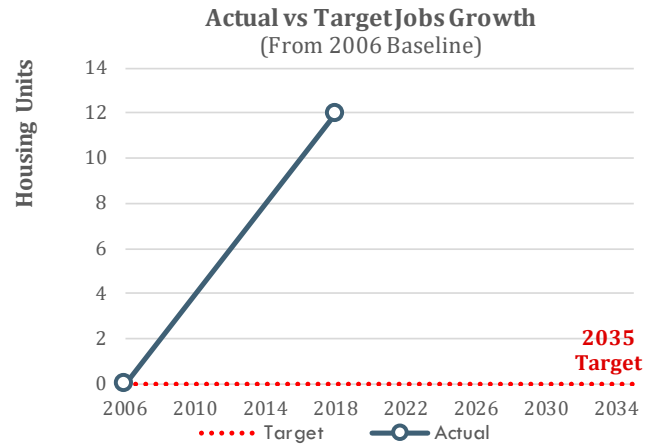


Skykomish - Residential Land Supply and Capacity

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



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

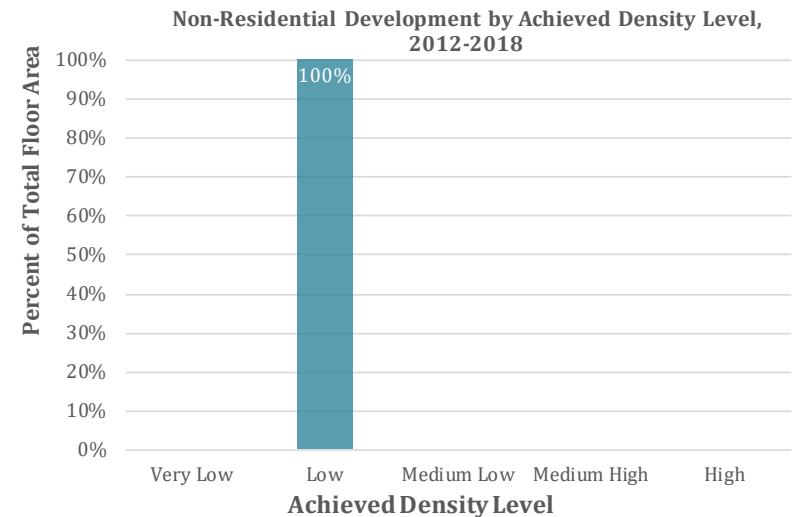
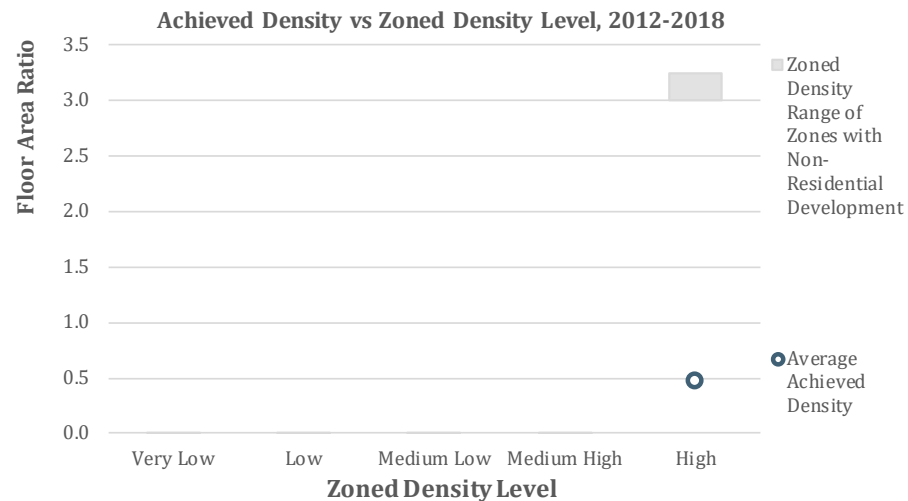
% of Pace Needed to Achieve 2035 Jobs Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Rate Needed to Meet 2035 Target
Not Applicable	1.44%	Not Applicable

Since 2006, the total number of jobs in Skykomish grew by roughly 1.4%. 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	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

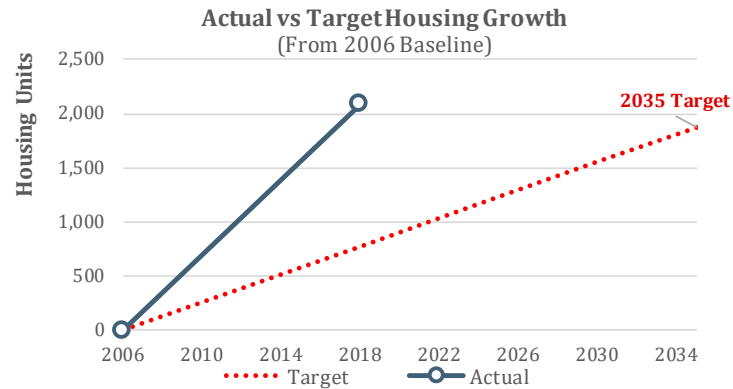


Skykomish - Commercial/Industrial Land Supply and Job Capacity

(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

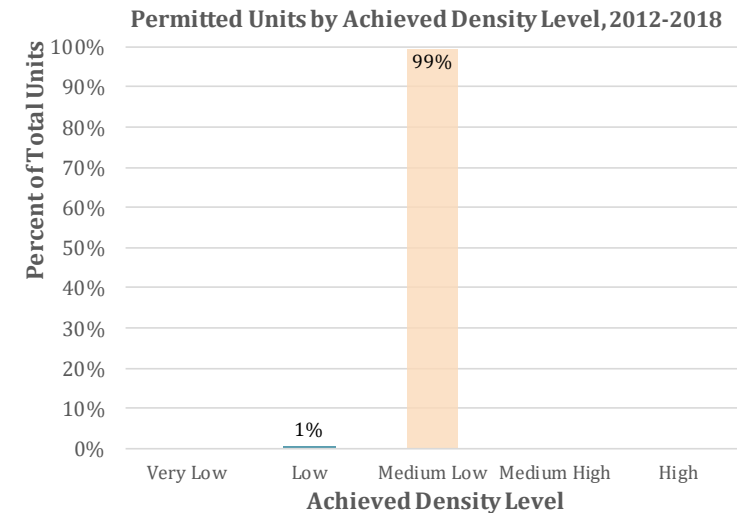
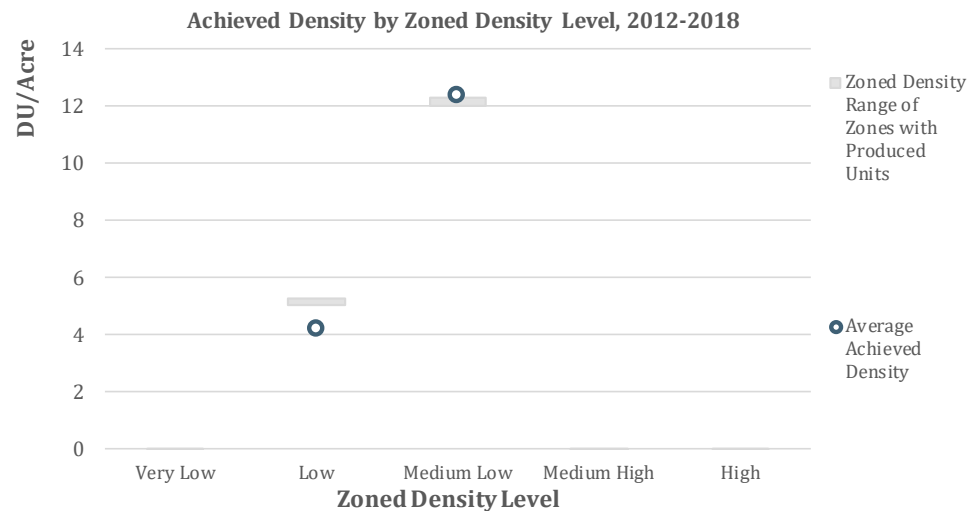
% of Pace Needed to Achieve 2035 Housing Growth Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Needed to Meet 2035 Target
269.2%	4.67%	Met Target

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

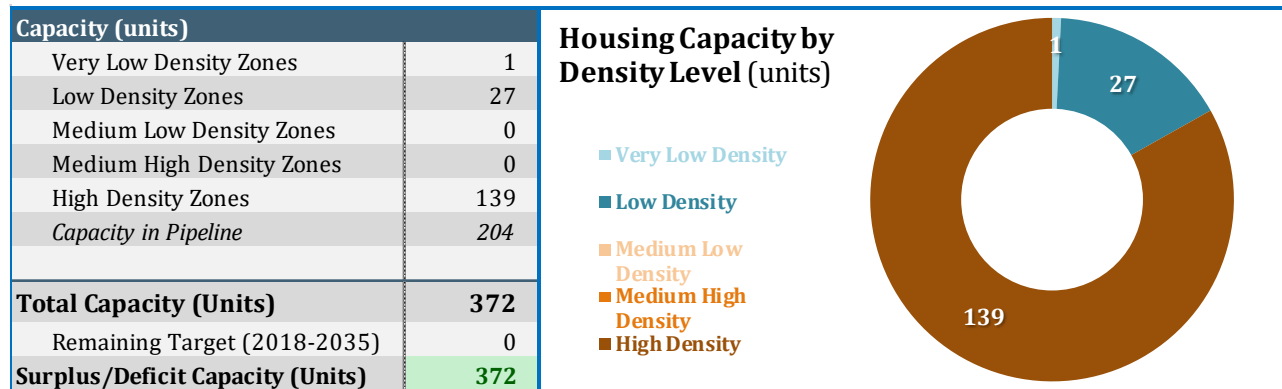
Zoned Density (du/acre)	Gross Area (acres)	Critical Areas (acres)	Public Purpose (acres)	ROWs (acres)	Net Area (acres)	Total Units	Achieved Density (DU/acre)
Very Low	0 - 4 du/acre	0.0	0.0	0.0	0.0	0	
Low	4 - 10 du/acre	1.0	0.0	0.0	1.0	4	4.1
Medium Low	10 - 24 du/acre	52.0	0.0	0.0	52.0	640	12.3
Medium High	24 - 48 du/acre	0.0	0.0	0.0	0.0	0	
High	48 & up du/acre	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

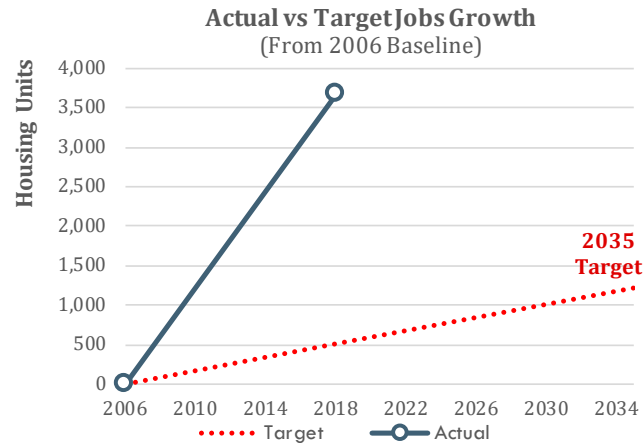


Snoqualmie - Residential Land Supply and Capacity

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



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

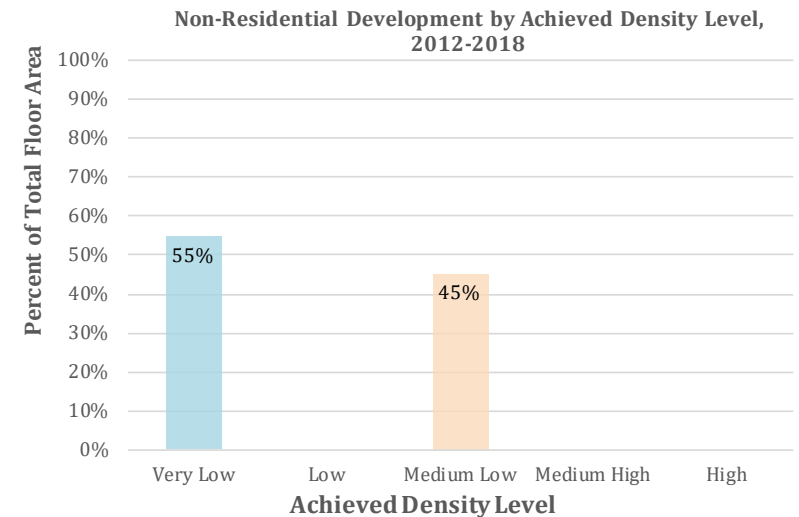
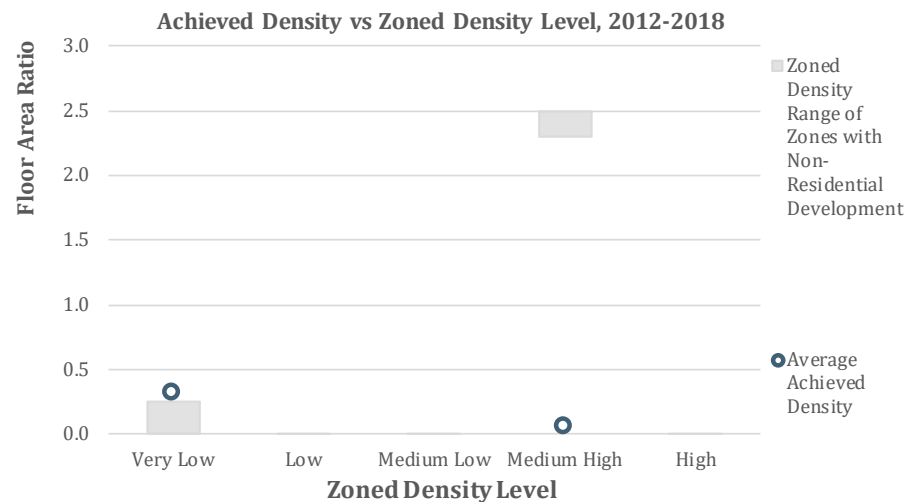
% of Pace Needed to Achieve 2035 Jobs Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Rate Needed to Meet 2035 Target
731.0%	9.12%	Met Target

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



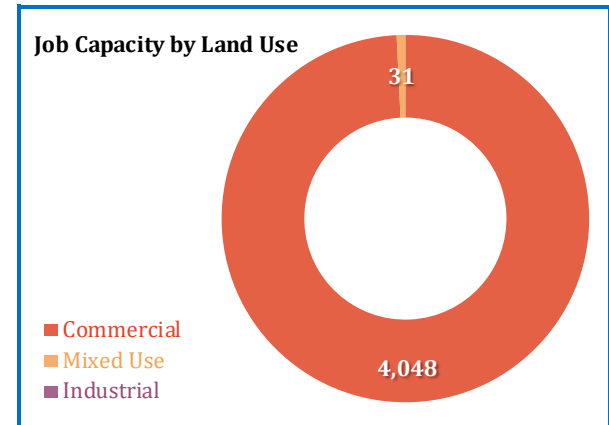
Snoqualmie - Commercial/Industrial Land Supply and Job Capacity

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
<i>Job Capacity in Pipeline</i>						<i>0</i>
City Total	0.65	0.40	1.86	0.21	300 / 800	4,079

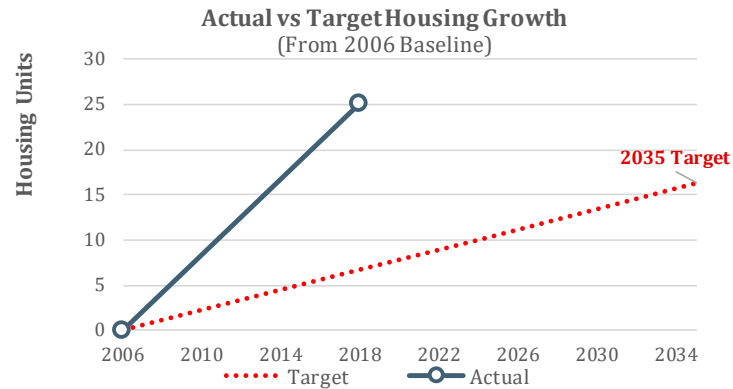
*Certain zones grouped as commercial allow for industrial use.

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%
<i>Capacity in Pipeline</i>		<i>0</i>
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	

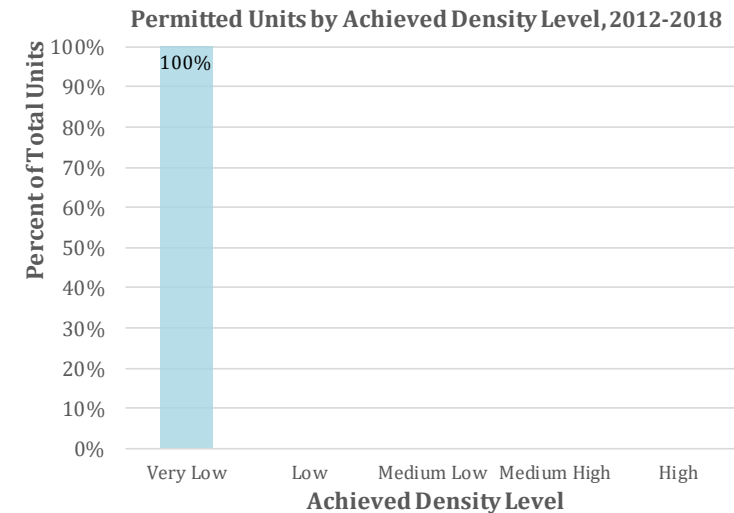
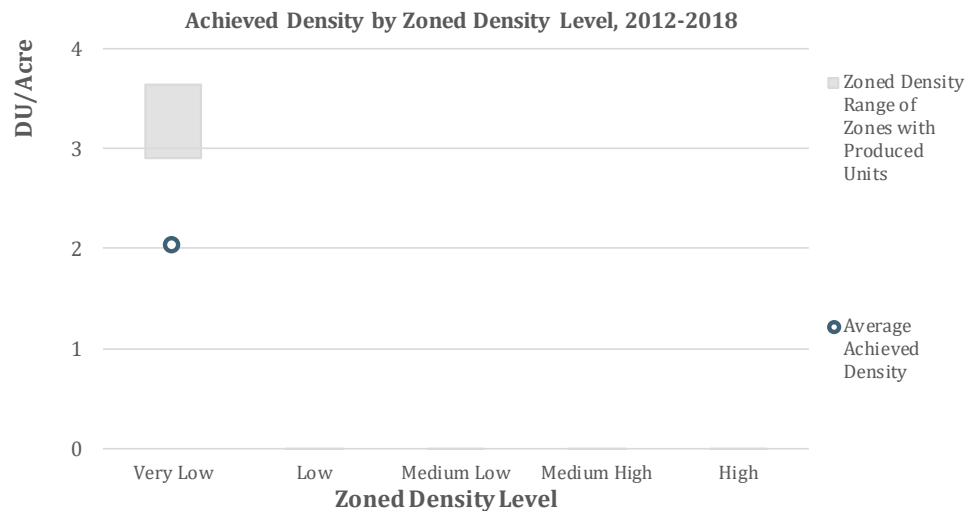
% of Pace Needed to Achieve 2035 Housing Growth Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Needed to Meet 2035 Target
374.6%	0.51%	Met Target

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

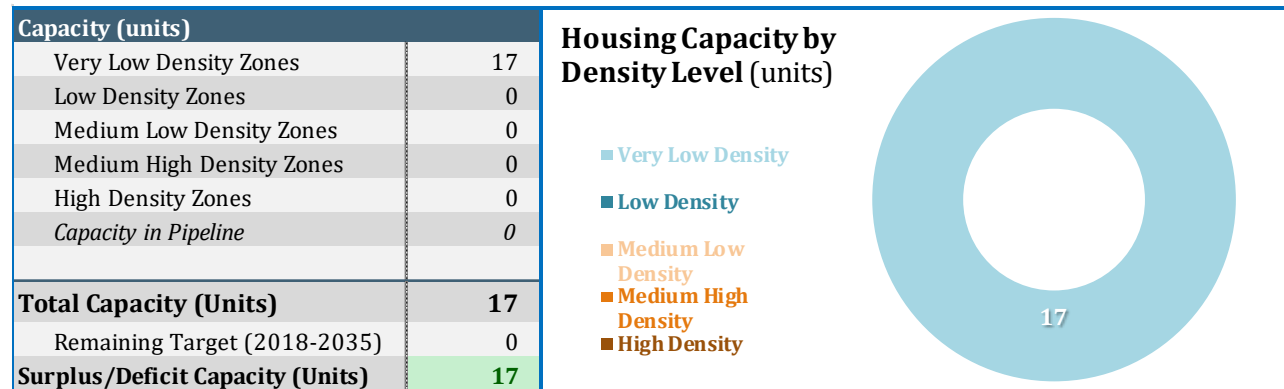
Zoned Density (du/acre)	Gross Area (acres)	Critical Areas (acres)	Public Purpose (acres)	ROWs (acres)	Net Area (acres)	Total Units	Achieved Density (DU/acre)
Very Low 0 - 4 du/acre	1.0	0.0	0.0	0.0	1.0	2	2.0
Low 4 - 10 du/acre	0.0	0.0	0.0	0.0	0.0	0	
Medium Low 10 - 24 du/acre	0.0	0.0	0.0	0.0	0.0	0	
Medium 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

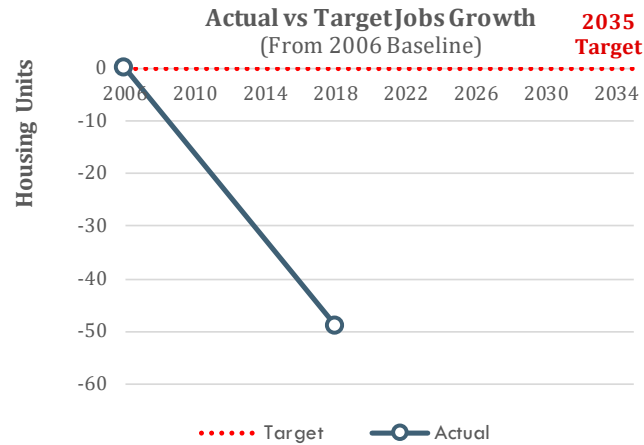


Yarrow Point - Residential Land Supply and Capacity

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



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

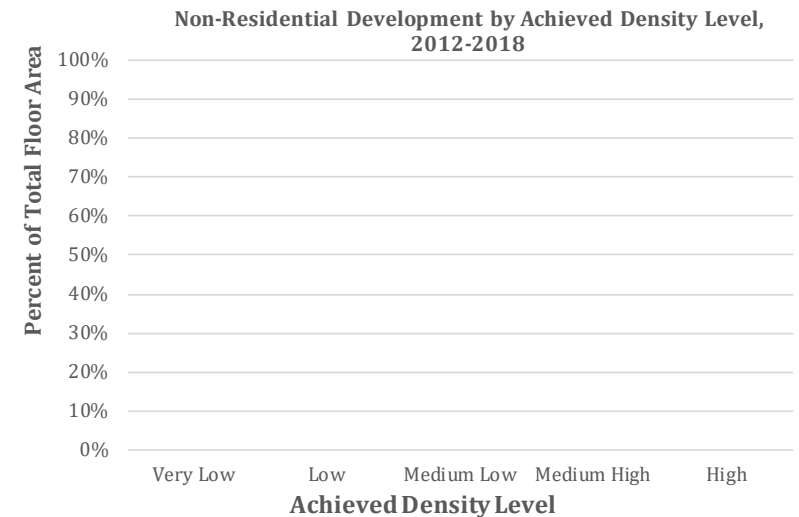
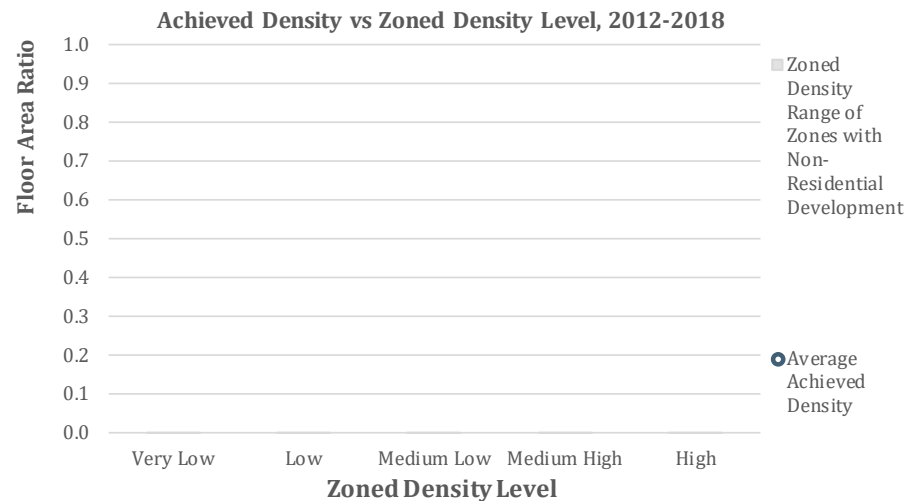
% of Pace Needed to Achieve 2035 Jobs Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Rate Needed to Meet 2035 Target
Not Applicable	-4.85%	Not Applicable

Since 2006, the total number of jobs in Yarrow Point grew by roughly -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	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



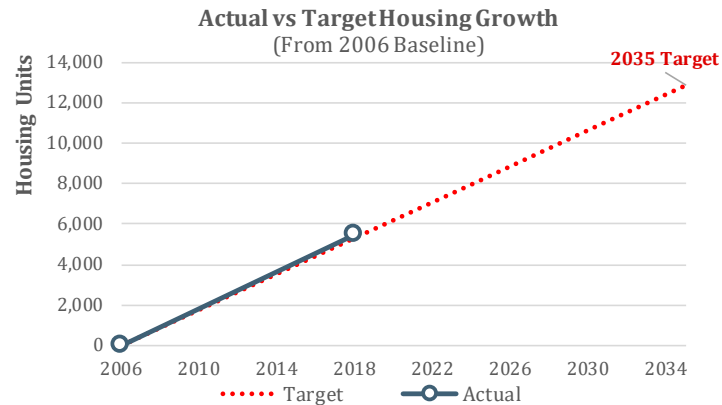
Yarrow Point - Commercial/Industrial Land Supply and Job Capacity

(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

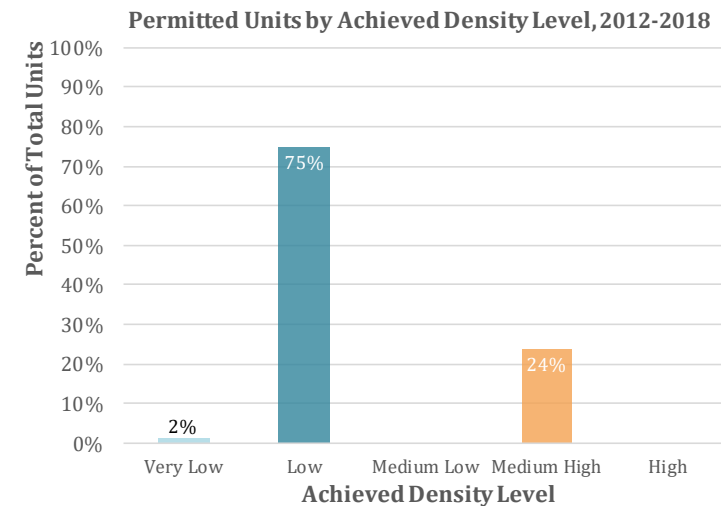
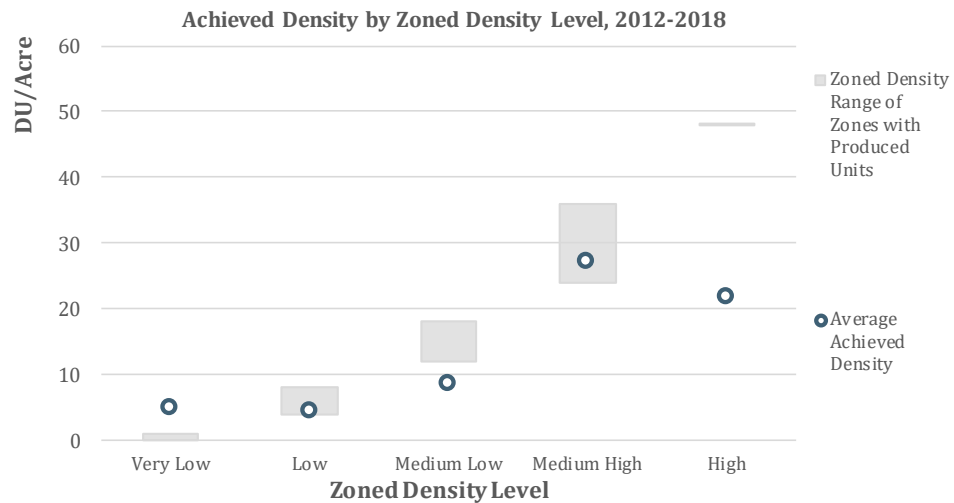
% of Pace Needed to Achieve 2035 Housing Growth Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Needed to Meet 2035 Target
103.5%	1.19%	0.96%

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

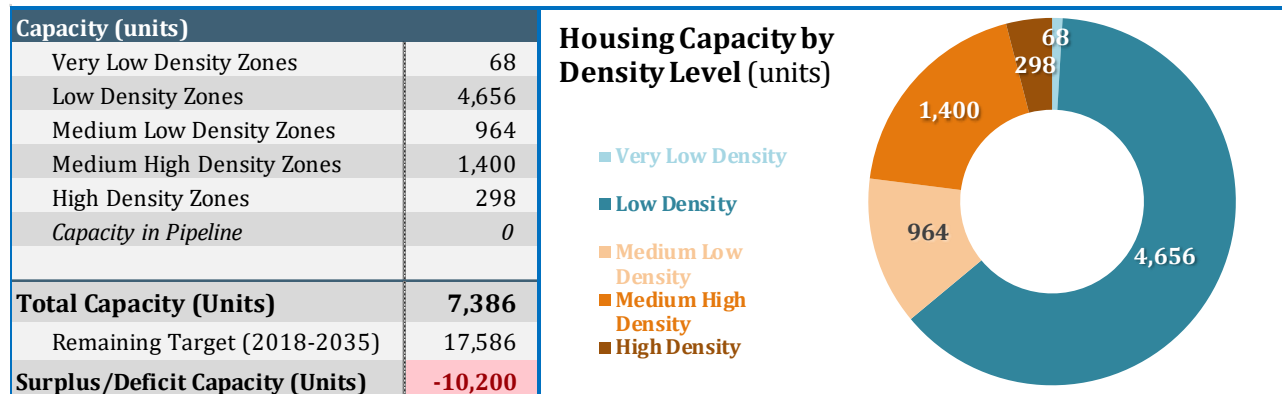
Zoned Density (du/acre)	Gross Area (acres)	Critical Areas (acres)	Public Purpose (acres)	ROWs (acres)	Net Area (acres)	Total Units	Achieved Density (DU/acre)
Very Low	0 - 4 du/acre	110.3	0.7	1.7	107.9	526	4.9
Low	4 - 10 du/acre	169.4	1.6	6.0	161.9	732	4.5
Medium Low	10 - 24 du/acre	25.9	0.0	1.9	24.0	208	8.7
Medium High	24 - 48 du/acre	17.9	0.0	0.0	6.6	179	27.0
High	48 & up du/acre	17.6	0.0	0.0	17.6	384	21.8
Total	341.2	2.3	0.0	9.6	318.0	2,029	6.4

Achieved Density Level	Net Area (acres)	Total Units
Very Low	36.7	31
Low	268.2	1,520
Medium Low	0.0	0
Medium High	13.5	479
High	0.0	0
Total	318.4	2,030

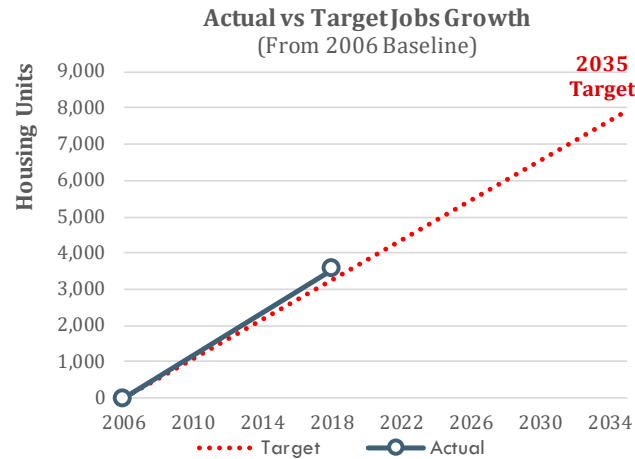


Urban Unincorporated - Residential Land Supply and Capacity

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				36.97	0.0% - 20.0%	91.43	0.1 / 0.7	61
	Redev Subtotal				6.63	0.0% - 20.0%	16.95	0.1 / 0.7	7
	Subtotal	1,524.99	324.83	221.63	43.61		108.38		68
Low Density	Vacant Subtotal				214.72	0.0% - 50.0%	740.60	4.3 / 9.6	3,813
	Redev Subtotal				43.53	0.0% - 50.0%	180.31	4.3 / 9.6	843
	Subtotal	1,062.74	499.00	139.28	258.25		920.91		4,656
Medium Low Density	Vacant Subtotal				2.47	7.0% - 21.0%	18.34	23.5	431
	Redev Subtotal				3.06	7.0% - 21.0%	22.93	23.5	534
	Subtotal	0.00	0.00	0.00	5.53		41.27		964
Medium High Density	Vacant Subtotal				2.42	0.0% - 50.0%	13.84	36.0 / 42.1	580
	Redev Subtotal				2.79	0.0% - 50.0%	19.52	36.0 / 42.1	819
	Subtotal	64.78	7.20	0.19	5.21		33.36		1,400
High Density	Vacant Subtotal				0.68	10.0% - 21.0%	5.35	49.0	262
	Redev Subtotal				0.10	10.0% - 21.0%	0.77	49.0	36
	Subtotal	0.00	0.00	0.00	0.78		6.12		298
All Zones	Vacant Total				257.26		869.57		5,147
	Redev Total				56.11		240.48		2,239
	Total	2,652.51	831.02	361.11	313.38		1,110.05		7,386



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

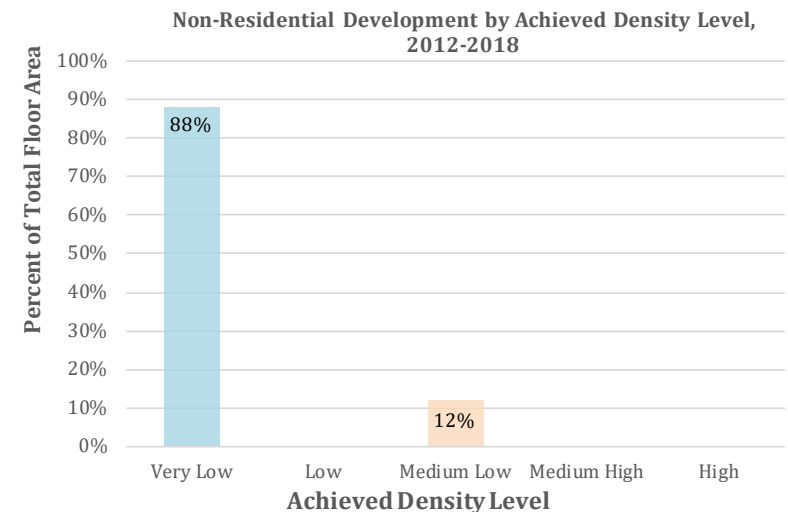
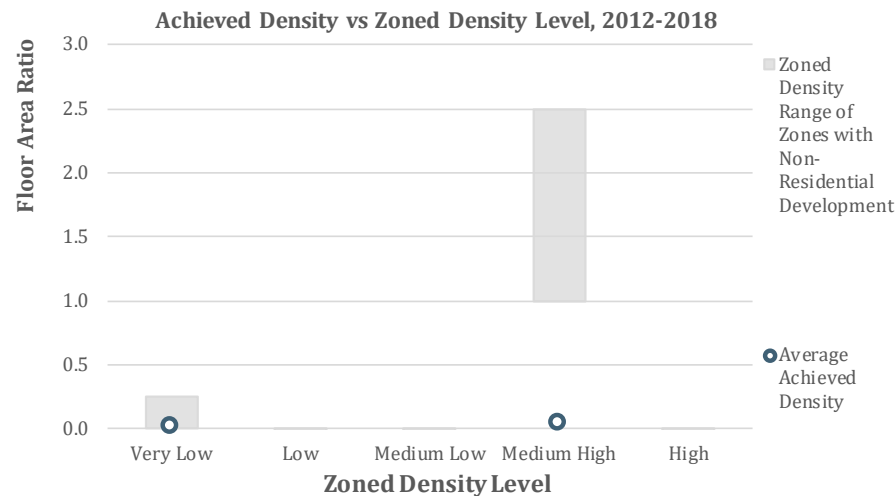
% of Pace Needed to Achieve 2035 Jobs Target	Average Annual 2006-2018 Growth Rate	2018-2035 Avg. Annual Growth Rate Needed to Meet 2035 Target
108.8%	2.06%	1.39%

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 1.4% 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	7,294,688	109,974	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	2,801,955	137,391	0.0
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



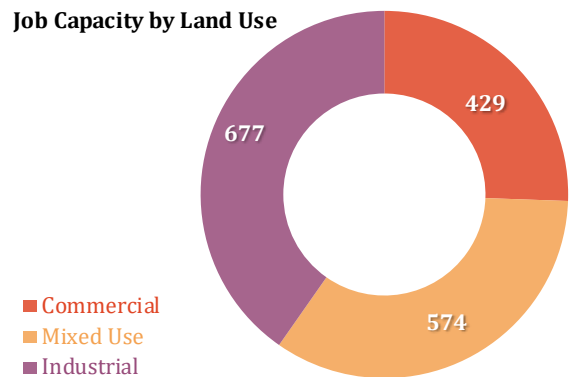
Urban Unincorporated - Commercial/Industrial Land Supply and Job Capacity

Land Supply	Gross Area (acres)	Critical Areas (acres)	ROWs (acres)	Public Purpose (acres)	Initial Land Supply	Market Factor	Buildable Area (acres)
Vacant / Redev.							
Commercial	4.5	1.9	0.1	0.1	2.4	10% - 25%	2.0
Mixed Use	79.3	8.0	3.6	3.6	64.2	0% - 50%	47.3
Industrial	154.4	47.8	5.3	16.0	85.3	0% - 30%	72.8
Non-Res Land Total	238.2	57.6	9.0	19.7	151.9		122.1

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	0.09	2.50	0.00	0.21	350 / 500	429
Redevelopable	0.00	2.50	0.00	0.00	350 / 500	0
Commercial Total	0.09	2.50	0.00	0.21	350 / 500	429
Mixed-Use						
Vacant	1.13	0.17 / 0.25	0.00	0.23	0 / 660	505
Redevelopable	0.93	0.17 / 0.25	0.18	0.04	0 / 660	68
Mixed Use Total	2.06	0.17 / 0.25	0.18	0.27	0 / 660	574
Industrial						
Vacant	1.12	0.25	0.00	0.28	0 / 1000	290
Redevelopable	2.05	0.25	0.13	0.38	0 / 1000	387
Industrial Total	3.17	0.25	0.13	0.67	0 / 1000	677
City Total						
Commercial	0.09	2.50	0.69	0.21	350 / 500	429
Mixed Use	2.06	0.17 / 0.25	0.91	0.27	0 / 660	574
Industrial	3.17	0.25	0.26	0.67	0 / 1000	677
<i>Job Capacity in Pipeline</i>						0
City Total	5.32	0.17 / 2.50	1.86	1.15	0 / 1000	1,680

Job Capacity by Assumed Density Level	#	%
Very Low Density	1,251	74%
Low Density	0	0%
Medium Low Density	0	0%
Medium High Density	429	26%
High Density	0	0%
<i>Capacity in Pipeline</i>		0
Total Capacity (jobs)		1,680
Remaining Target (2018-2035)		5,468
Surplus/Deficit Capacity (jobs)		-3,788

Job Capacity by Land Use



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 Rebecca 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!

¹Please email completed reporting documents to rmaskin@kingcounty.gov. If electronic submission is not possible, please contact Rebecca 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

Zone	A	B	C	D1	D2	E		
	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

Zone	Permit Year	Project Name	Mixed-use Project	A % of Mixed-use in Residential	B Gross Area	C1 Critical Areas	C2 Public Purpose Area	C3 Right-of-way Area	D Net Buildable Area	E 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*

Zone	A Number of ADUs	B Number of Units Added through Conversion	C Pre-existing Units	D Parcel Area	ADU/Convert Achieved Density	E 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*

Zone	A Total Residential Units	B 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

Zone	Permit Year	Project Name	Mixed-use Project	A % of Mixed-use in Commercial	B Gross Site Area	C1 Critical Areas	C2 Public Purpose Area	C3 Right-of-way Area	D Net Site Area	E Net Site Area	F1 MU Floor Area	F2 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*

Zone	A Total Floor Area	B 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 Rebecca 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 statute¹ 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:

Zone	Select:				DU/acre	FAR	Optional Fields (to assist with density calculation)						
	Residential	Non-Residential	Mixed-use	Other			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

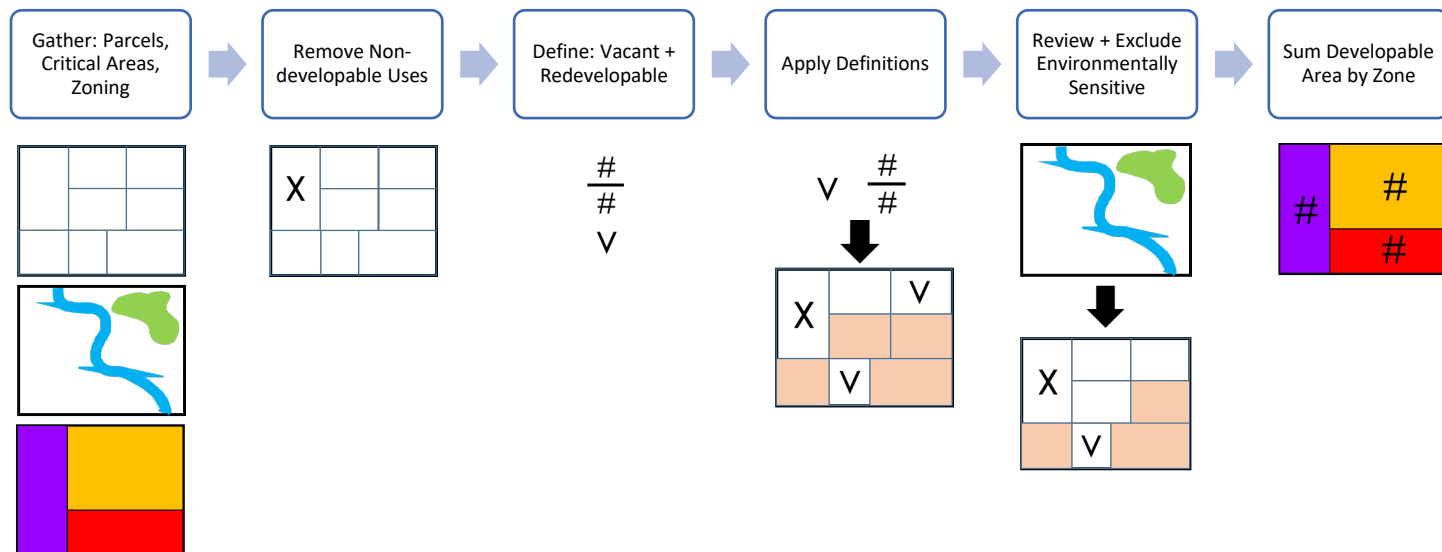
To quantify the developable land supply, jurisdictions will:

- 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,

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- 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*

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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	<p>KC Assessor indicates property tax exemption. PropType = X.</p> <p>KC Assessor. Query Owner field for records containing strings, such as “CITY OF” or “SCHOOL.”</p> <p>KC Assessor. Query PresentUse field for codes indicating various public uses (e.g., 184 for public schools).</p> <p>Individual jurisdiction parcel inventories of public facilities and parks.</p>	<p>Ownership may include city, school district, county, or state agencies.</p> <p>Watch out for multiple spellings or abbreviations used for public agency names (e.g., Dept. vs. Department vs. DNR).</p> <p>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.</p> <p>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.</p>
Religious institution use or ownership	<p>PropType screen (see above).</p> <p>Query for PresentUseCode = 165 (Church/Welfare/Relig. Svc.)</p> <p>Query Owner field for records containing strings, such as “CHURCH.”</p>	<p>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.</p> <p>Parcels in religious institution ownership, but not use, are more likely to be available for future development. Use discretion in selecting or excluding properties.</p> <p>Queries for strings in Owner name field (here and below) will select some parcels not intended for exclusion (e.g., “JOHN CHURCH”).</p> <p>Un-select these records by visually screening selected set.</p>

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Use Type	Identification Methods	Comments
Cemeteries	Query for PresentUseCode = 179 (Mortuary/Cemetery/Crematory) 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) 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. PropType query (see above) will likely select many private, non-profit educational institutions, most of which should be excluded from the inventory. 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). 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 was 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 and 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 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 statute 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 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.

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						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) <i>more information on this field will be provided in November</i>
	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!

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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.”

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Phase 2 Data Collection - Additional Guidance on Infrastructure Gaps

- 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:

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Phase 2 Data Collection - Additional Guidance on Infrastructure Gaps

- **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

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 Rebecca 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:

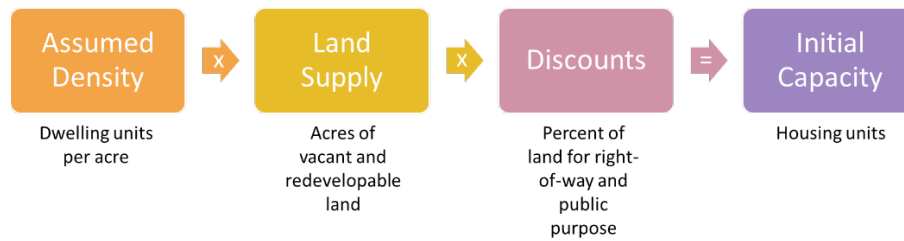
- Market Factor. An assumption that accounts for the amount of land kept out of development because of landowner preference not to develop.
- Square feet per Job Assumptions. These assumptions are used to convert non-residential capacity expressed in square feet to employees.

How Initial Capacity is calculated

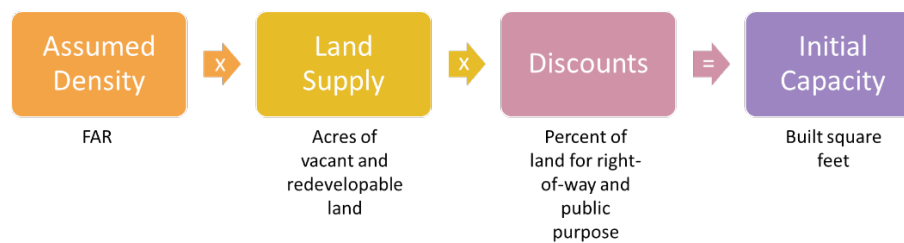
Generally, developable capacity is calculated by zone, and is the product of a zone’s assumed density and the area of land supply, minus a percentage accounting for streets, sidewalks, and public purpose land. Achieved densities calculated in Phase 1 of data collection form the basis for the assumed 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.

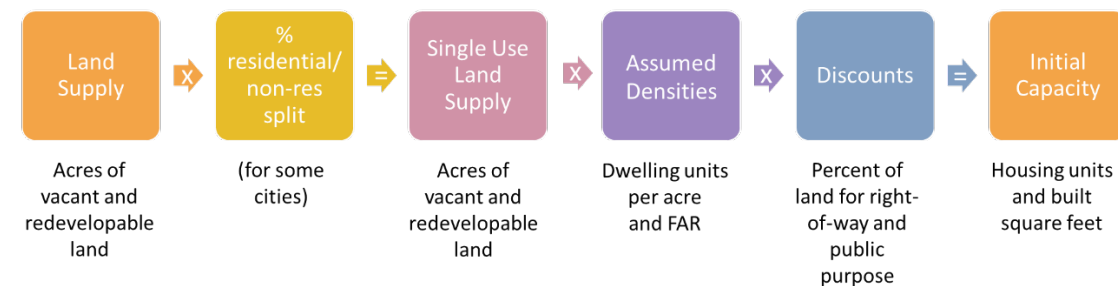
Calculating Residential Capacity



Calculating Non-Residential Capacity



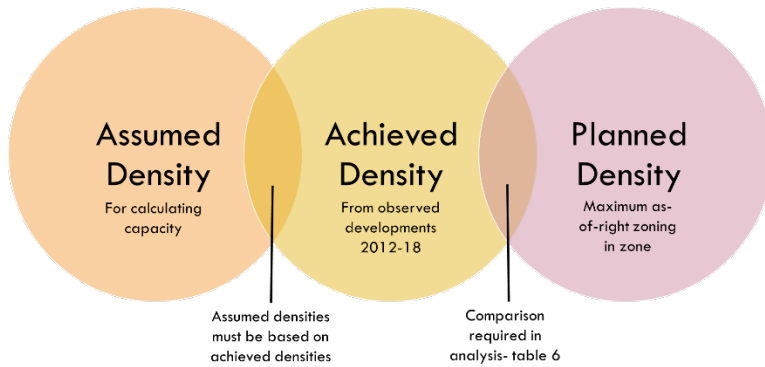
Calculating Mixed-use Capacity



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/armask#!/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

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- 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 have been pre-programmed 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 Calendly, 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 Rebecca 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.

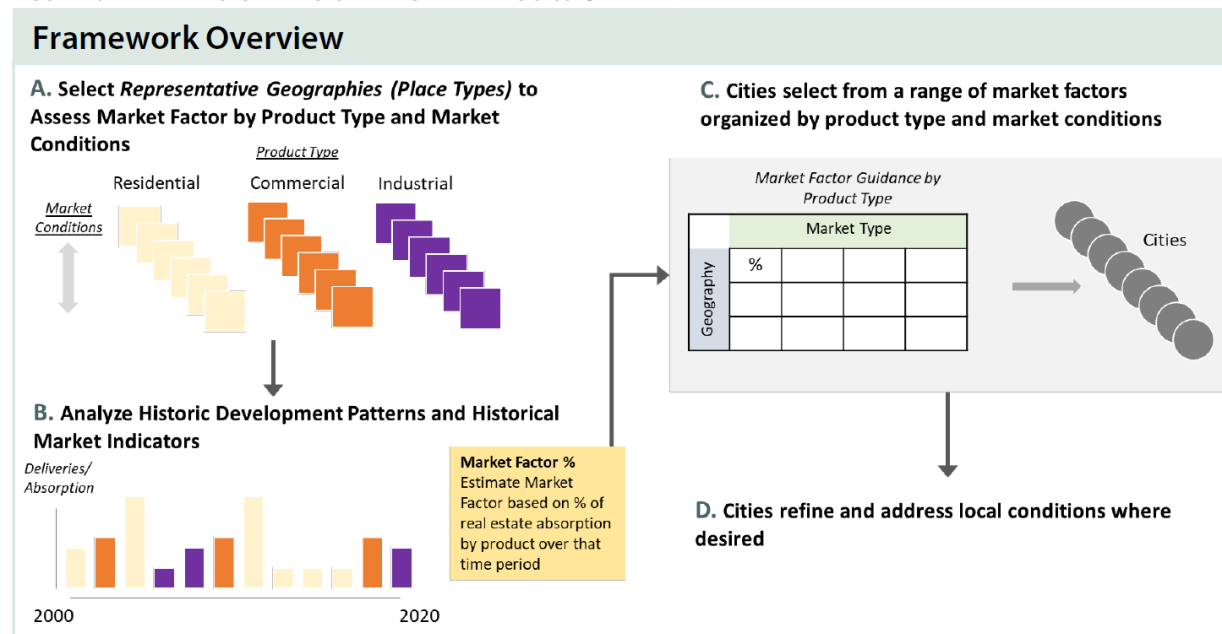
Through an updated analysis¹, recommended market factor ranges have been developed for residential and non-residential zones, varying by Regional Geography and relative market strength (market factor alignment). The analysis behind these recommended ranges compares historical development and land supply 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.

King County 2021 Urban Growth Capacity Report Phase 4 Guidance

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.

King County 2021 Urban Growth Capacity Report Phase 4 Guidance

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 likelihood 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.

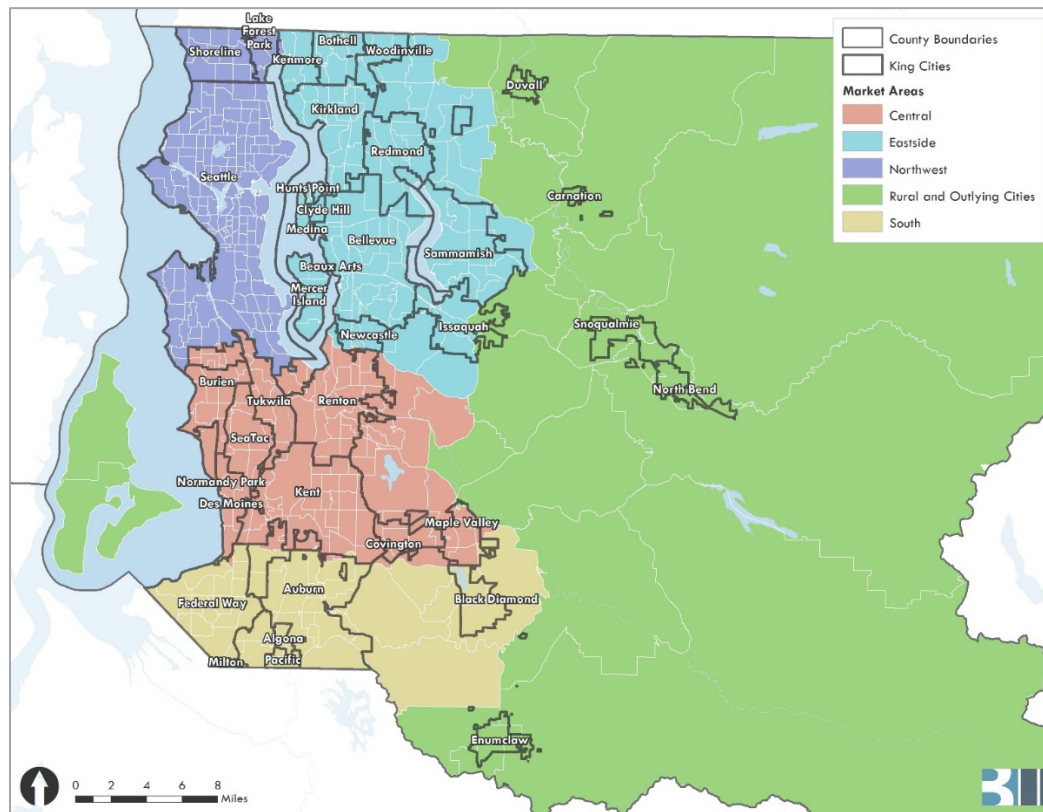
To prepare for the 2021 Urban Growth Capacity Report, an analysis of recent employment densities compared to past densities across King County was performed.² The analysis compared the amount of industrial and other commercial jobs to the aggregated amount of similarly classified non-residential built 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.**

King County 2021 Urban Growth Capacity Report
Phase 4 Guidance

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)
<div> <div> <div>Name of Zone</div> <div>Y/N</div> <div>SF/MF/MU</div> <div>Select Vacant or Redevelopable</div> <div>From Phase 3</div> <div>From Phase 3</div> <div>From Phase 3</div> <div>From Phase 3</div> <div>From Table 1</div> </div> <div> <div>= Column F * (1 - Column G - Column H - Column I)</div> <div>= Column E * Column J</div> </div> </div>										
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.

King County 2021 Urban Growth Capacity Report
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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 Rebecca 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

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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:

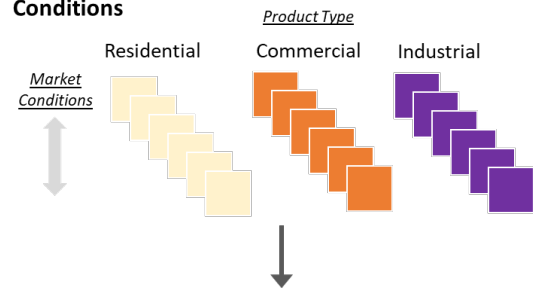
- What was delivered over the last 20 years by product type?
- How do historical rates of deliveries align with future capacity planned in the area?
- How does current supply for any given product type align with projected capacity?
- Leverage this data to inform Market Factor recommendations.

Provide recommendations for determining Market Factor based on:

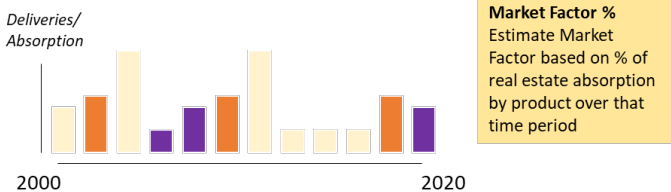
- Product-type
- Regional Geography
- Market conditions
- Other known market constraints

Methodology Overview

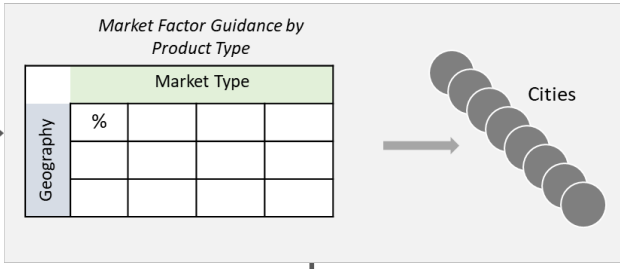
A. Select Representative Geographies (Place Types) to Assess Market Factor by Product Type and Market Conditions



B. Analyze Historic Development Patterns and Historical Market Indicators



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
Cities’ Planned capacity
- Regional Geographies: PSRC Regional Geographies classifications.
- Data Sources: - King County Parcel Data
- Year 2020 King County Buildable Lands Data
- 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

Market Factor: Establishing Market Factor Ranges

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.

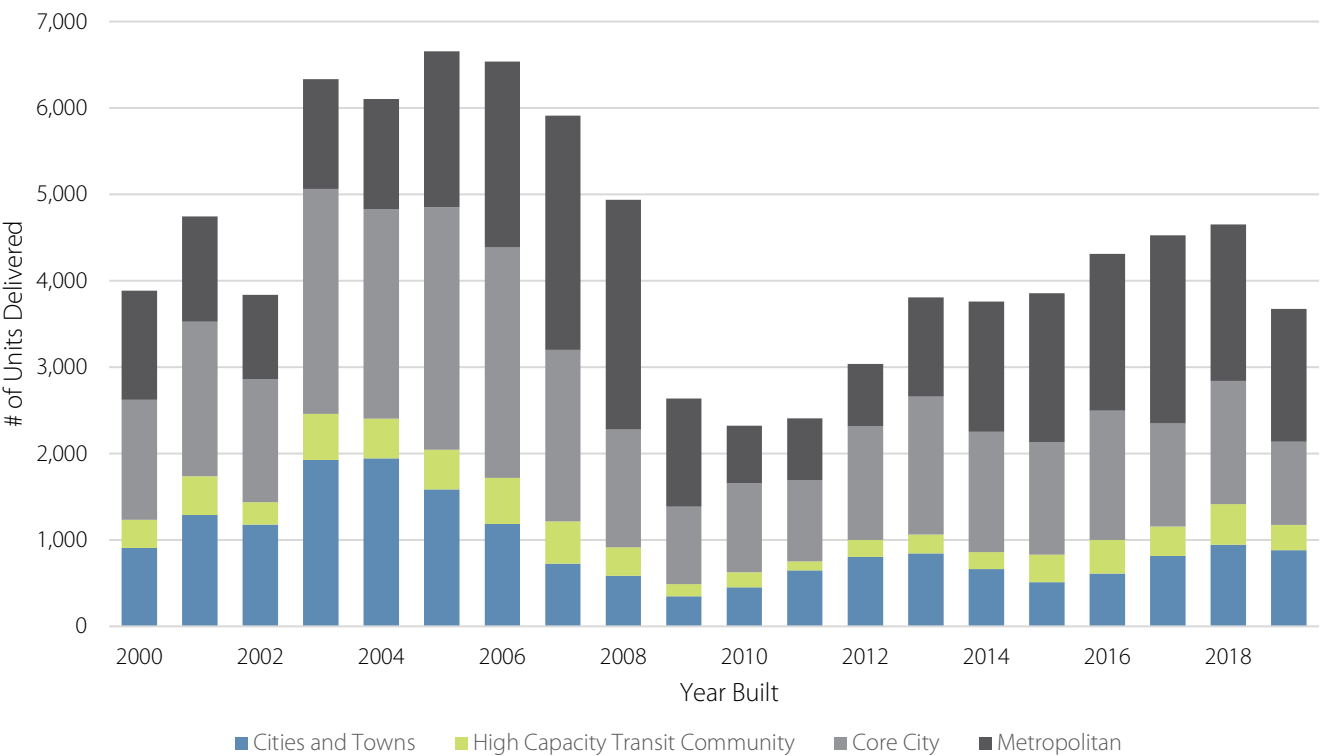
The three data sources combined provide a viewpoint of:

- 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:

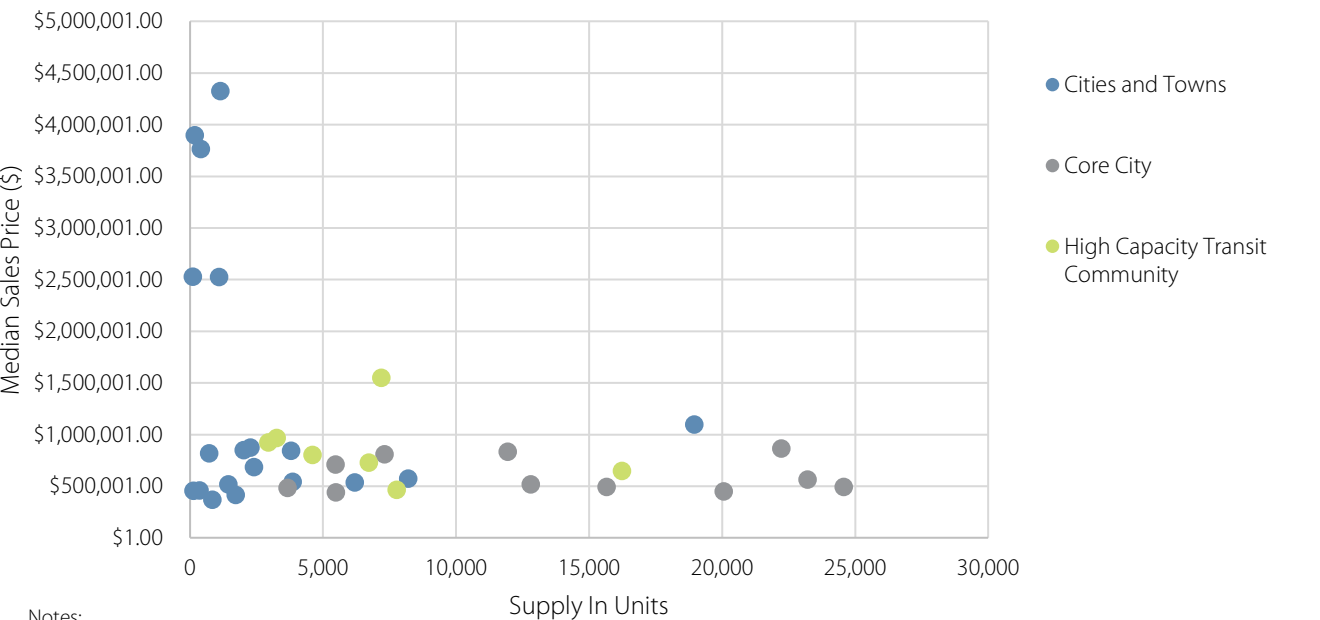
Several limitations exist and are important to acknowledge in the context of their impact to inform the Market Factor assumptions contained later in the Guidance Document. None of the data discussed herein lend themselves to a directly translatable Market Factor value, rather they are used to inform 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



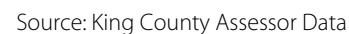
Source: King County Assessor Data

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



A scatter plot showing the relationship between Rent Rates (\$/SF) on the Y-axis and Supply In Units on the X-axis. The Y-axis ranges from 1.0 to 2.8 in increments of 0.2. The X-axis ranges from 0 to 25,000 in increments of 5,000. Three data series are plotted: Cities and Towns (blue dots), Core City (grey dots), and High Capacity Transit Community (yellow-green dots). The plot shows that for a given supply, High Capacity Transit Communities generally have higher rent rates than Core Cities, which in turn have higher rent rates than Cities and Towns. Additionally, Core Cities show a clear upward trend where rent rates increase significantly as supply increases beyond 10,000 units.

Community Type	Supply In Units (X)	Rent Rates \$/SF (Y)
Cities and Towns	0	1.50
Cities and Towns	0	1.52
Cities and Towns	0	1.55
Cities and Towns	0	1.90
Cities and Towns	500	1.50
Cities and Towns	500	1.52
Cities and Towns	500	1.55
Cities and Towns	500	1.68
Cities and Towns	1000	1.90
Cities and Towns	1000	1.90
Cities and Towns	1000	1.90
Cities and Towns	2500	1.90
Core City	4500	1.68
Core City	4500	1.88
Core City	6500	2.02
Core City	7500	1.68
Core City	8500	1.52
Core City	10500	2.08
Core City	16000	1.60
Core City	17000	1.88
Core City	18500	2.40
Core City	19500	2.38
Core City	21000	1.75
High Capacity Transit Community	500	2.02
High Capacity Transit Community	1500	2.02
High Capacity Transit Community	1500	2.08
High Capacity Transit Community	1500	2.18
High Capacity Transit Community	2500	2.02
High Capacity Transit Community	2500	2.60
High Capacity Transit Community	5500	1.68
High Capacity Transit Community	7500	2.05

Source: King County Assessor Data, Costar

Exhibit 3a: Commercial Space (sq ft) Deliveries 2000-2019

Commercial Space (sq ft) Deliveries, 2000-2019

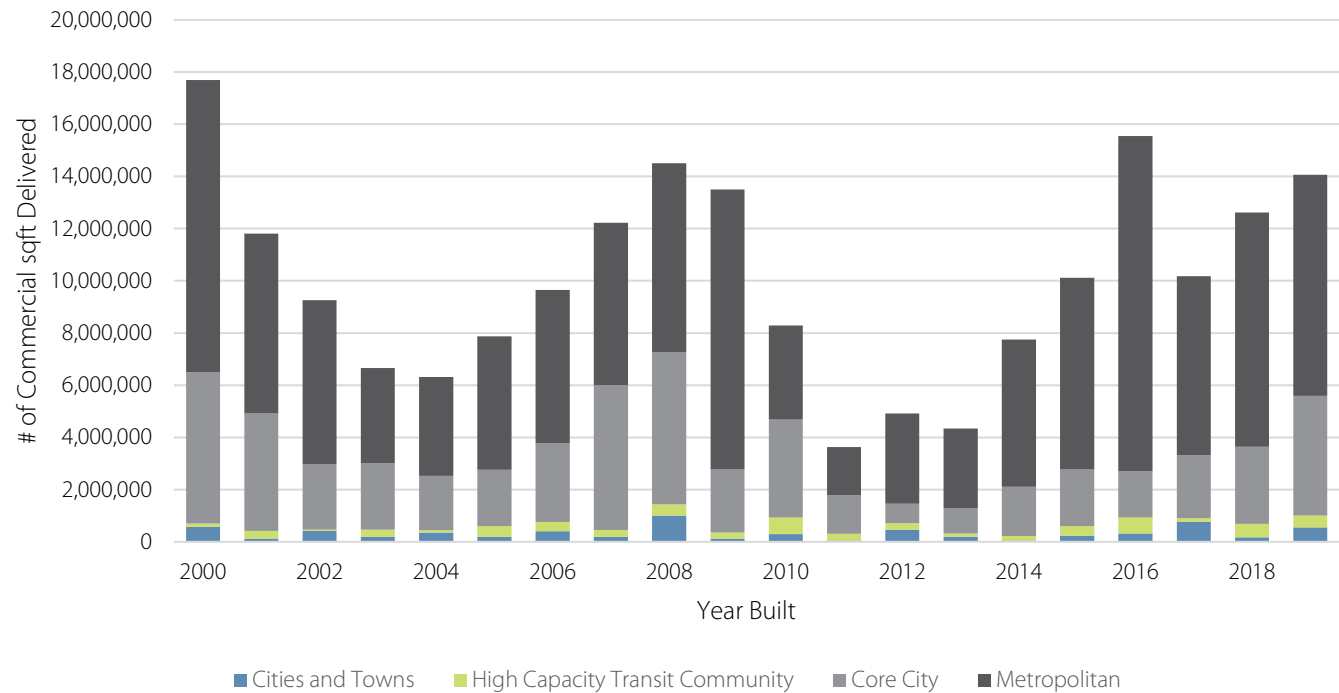
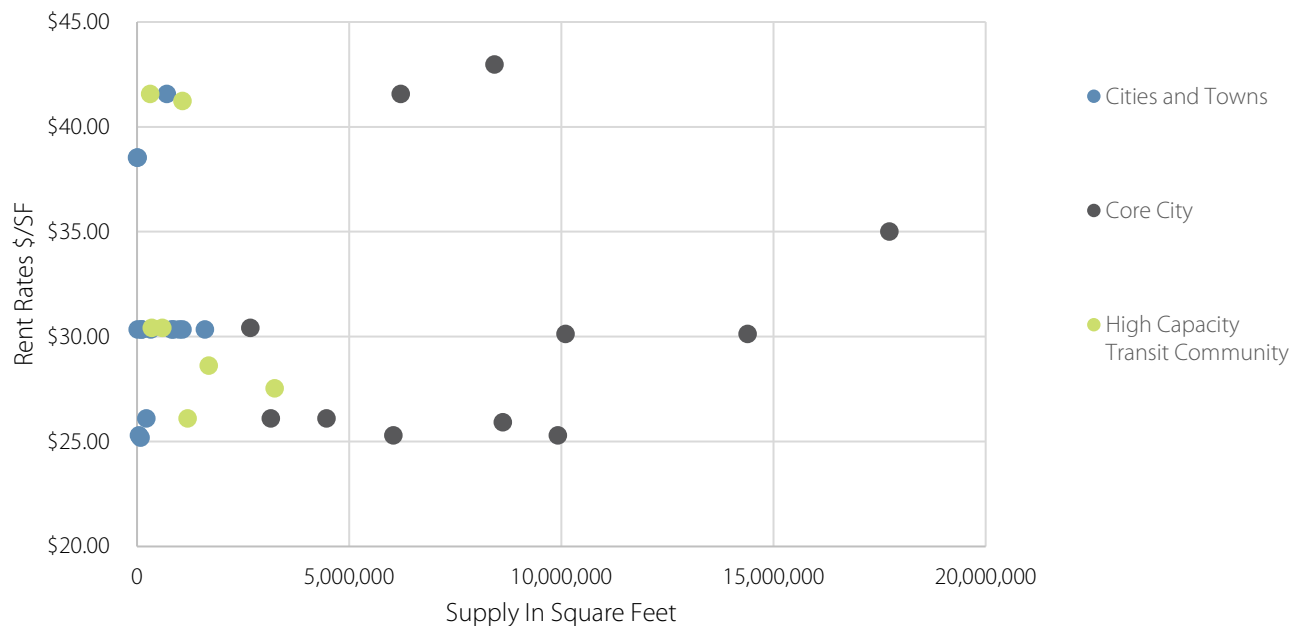


Exhibit 3b: Commercial Supply and Current Rent (\$/ sq ft)



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)	<ul style="list-style-type: none">• Select the Product-types that align with the zones within your City that have capacity• 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)	<ul style="list-style-type: none">• Select applicable Regional Geography based on the Menu• 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)	<ul style="list-style-type: none">• 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)	<ul style="list-style-type: none">• Review known conditions that impact Market Factor (p. 12)• Evaluate applicability in your City• 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	<ul style="list-style-type: none">Table 1A - Product-type Reference 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 or mixed). 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	<ul style="list-style-type: none">• Table 2A – Metropolitan• Table 2B – High-Capacity Transit Market Factor Alignment Table• Table 2C – Core Cities Market Factor Alignment Table• 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	
<i>Market Factor Alignment</i>	Multifamily/ Mixed-Res	Single Family	Commercial (Office/Retail/Mixed)	Industrial
Core City				
<i>Low</i>	5%-10%	1%-14%	1%-10%	1%-15%
<i>Medium</i>	11%-20%	15%-20%	11%-20%	16%-35%
<i>High</i>	21%-35%	21%-30%	21%-50%	36%-50%
High-Capacity Transit				
<i>Low</i>	5%-10%	1%-9%	1%-14%	1%-19%
<i>Medium</i>	11%-15%	10%-20%	15%-25%	20%-30%
<i>High</i>	16%-30%	21%-35%	26%-50%	31%-50%
Cities and Towns				
<i>Low</i>	10%-24%	1%-10%	1%-10%	1%-15%
<i>Medium</i>	25%-35%	11%-40%	11%-20%	16%-35%
<i>High</i>	36%-50%	41%-50%	21%-50%	36%-50%
Metropolitan				
<i>Low</i>	5%-10%	1%-14%	1%-10%	1%-15%

Methodology Reminder:

These ranges are informed by the Market Factor Indicator 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 <i>Market Factor Ranges</i> based on known conditions
Definitions and Reference	<ul style="list-style-type: none">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 these 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	
		<i>Select a lower value from the range if:</i>	<i>Select a higher value from the range if:</i>
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	<p>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.</p> <p>Important indicators to consider when adjusting for such a condition include:</p> <ul style="list-style-type: none"> – Whether home prices are below, on par or above median prices in the region – The age and quality of the housing stock – Recent transaction activity – Recent permitting activity 	<p>The conditions of the capacity lands with single family uses reflect the following conditions:</p> <ul style="list-style-type: none"> – Home prices at or below median prices for the area – The housing stock is aging – There is a higher rate of recent transactions reflecting interest from developers 	<p>The conditions of the capacity lands with single family uses reflect the following conditions:</p> <ul style="list-style-type: none"> – Home prices are above median prices for the area representing a potential market barrier to redevelopment – The housing stock includes recently constructed or updated structures – 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

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

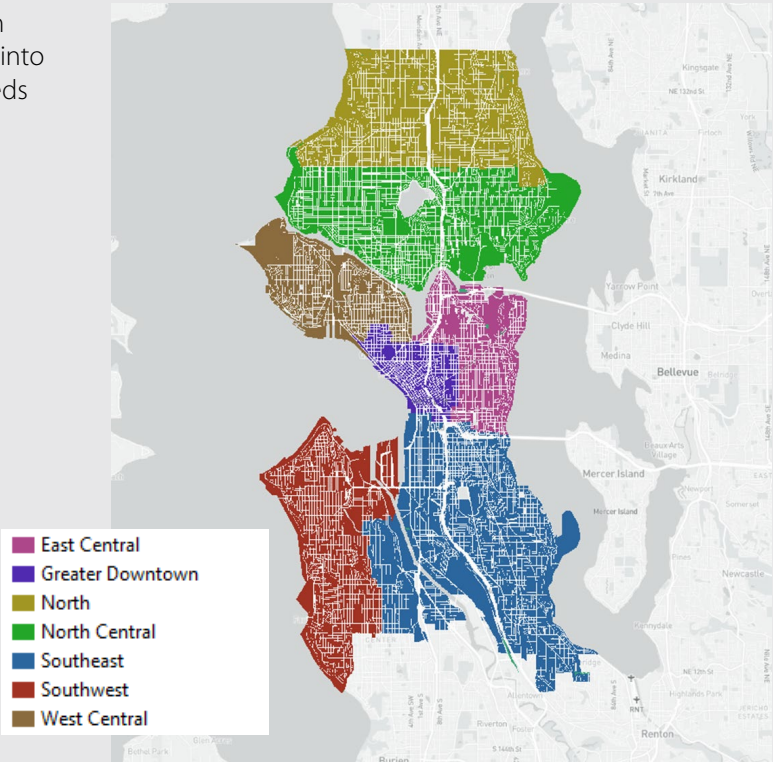
Sub-geographies

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.

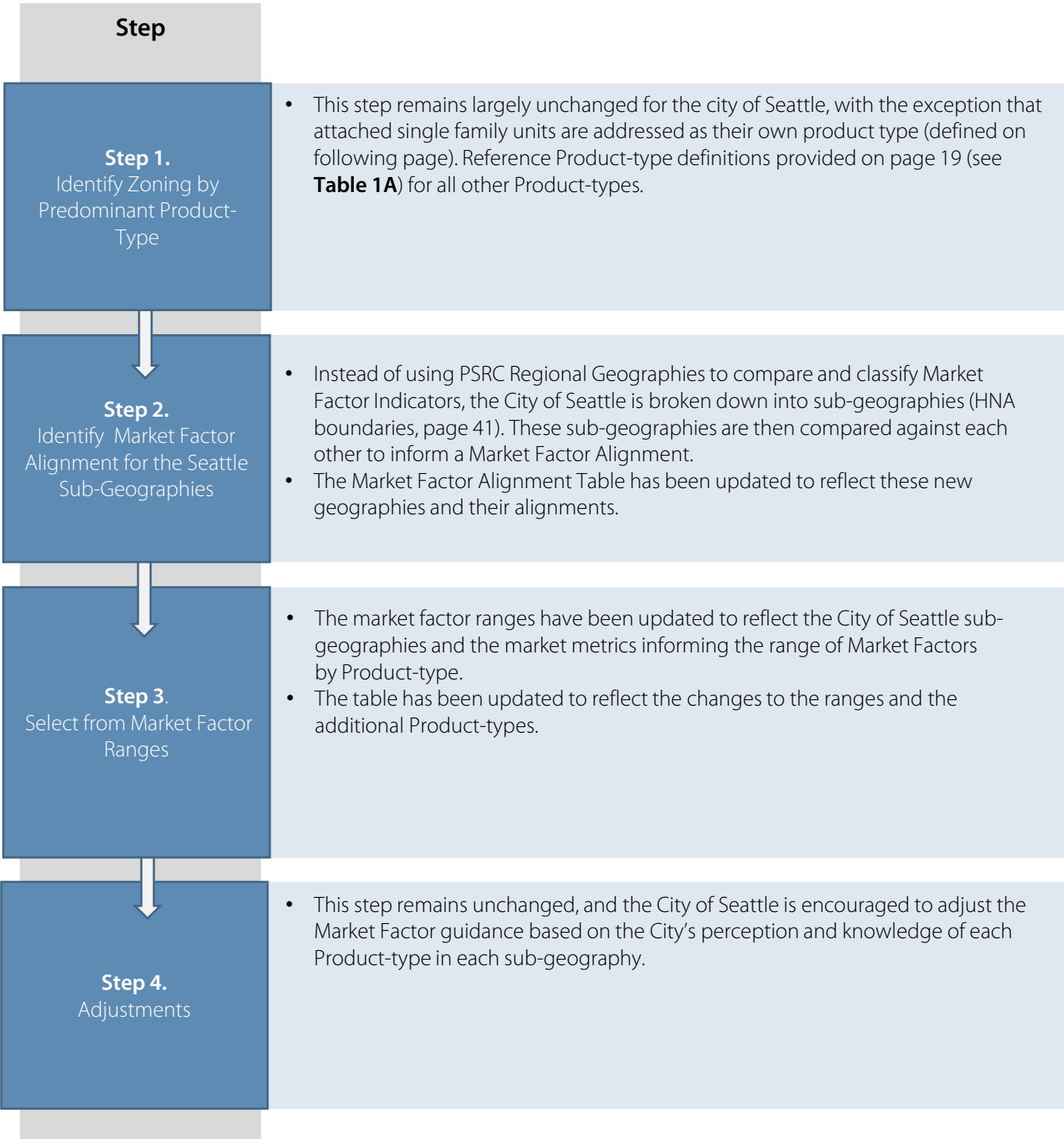
- North
- North Central
- West Central
- East Central
- Downtown
- Southwest
- Southeast

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 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				
	Multifamily/MU	Single Family Attached	Single Family Detached	Commercial (Office /Retail/Mixed-use)	Industrial
City					
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 Annual Supply (Units)	5-yr Average 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%

Market Factor Guidance – City of Seattle

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 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

Market Factor Guidance – City of Seattle

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:

$$\text{Total job capacity} = \text{Gross square footage}^1 \text{ of floor area capacity} / \text{gross square footage per job}$$

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.

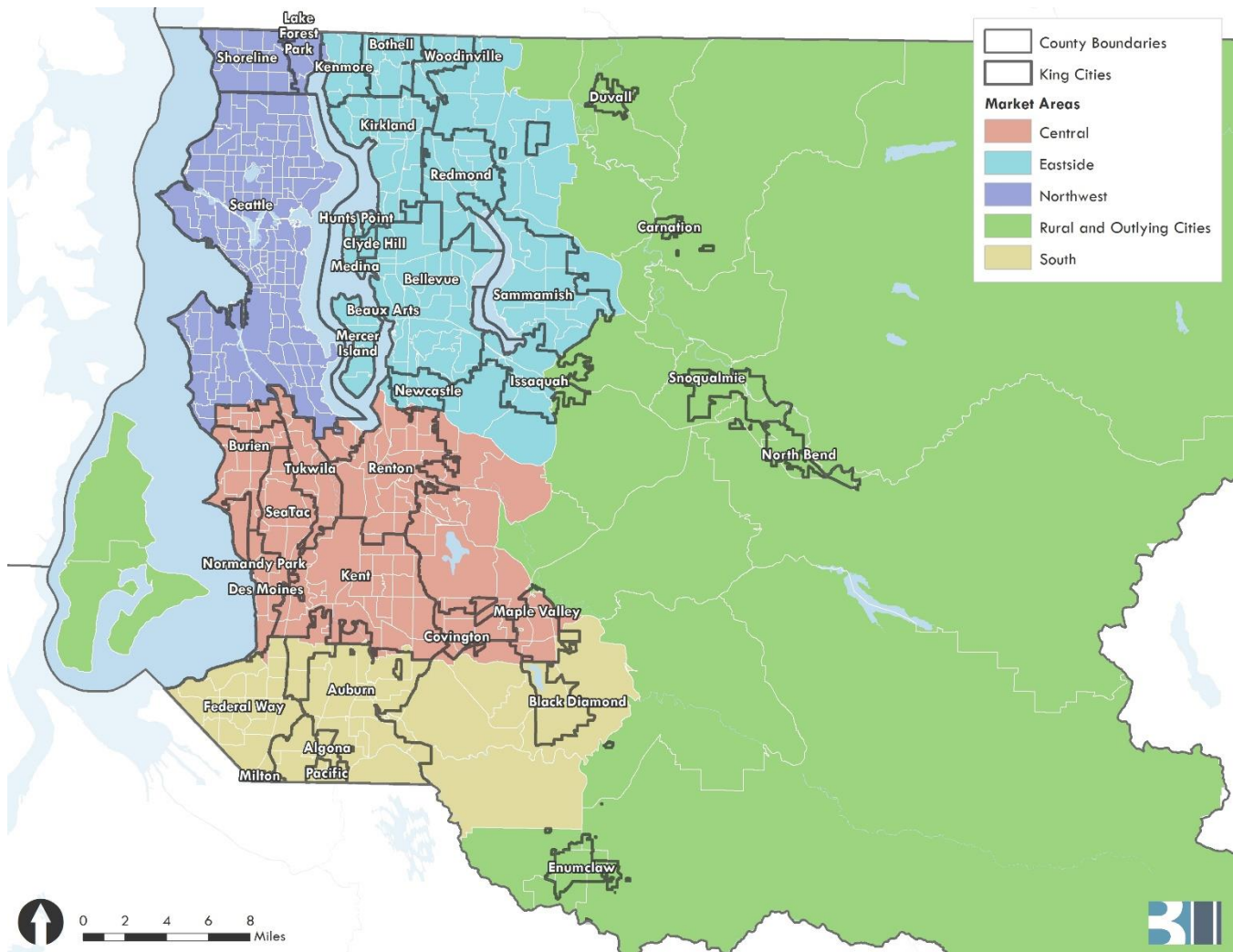
Jurisdictions have the discretion to choose whether to customize employment density assumptions for each zone or select broad assumptions. There is no single correct approach. The choice can depend upon local conditions, staff or consultant capacity for conducting analysis, and access to relevant data. 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:

$$\text{Total gross square footage per employee} = (\text{gross square footage for employment} / \text{number of employees}) \times (1 + \text{expected vacancy})$$

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 job⁴ 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.

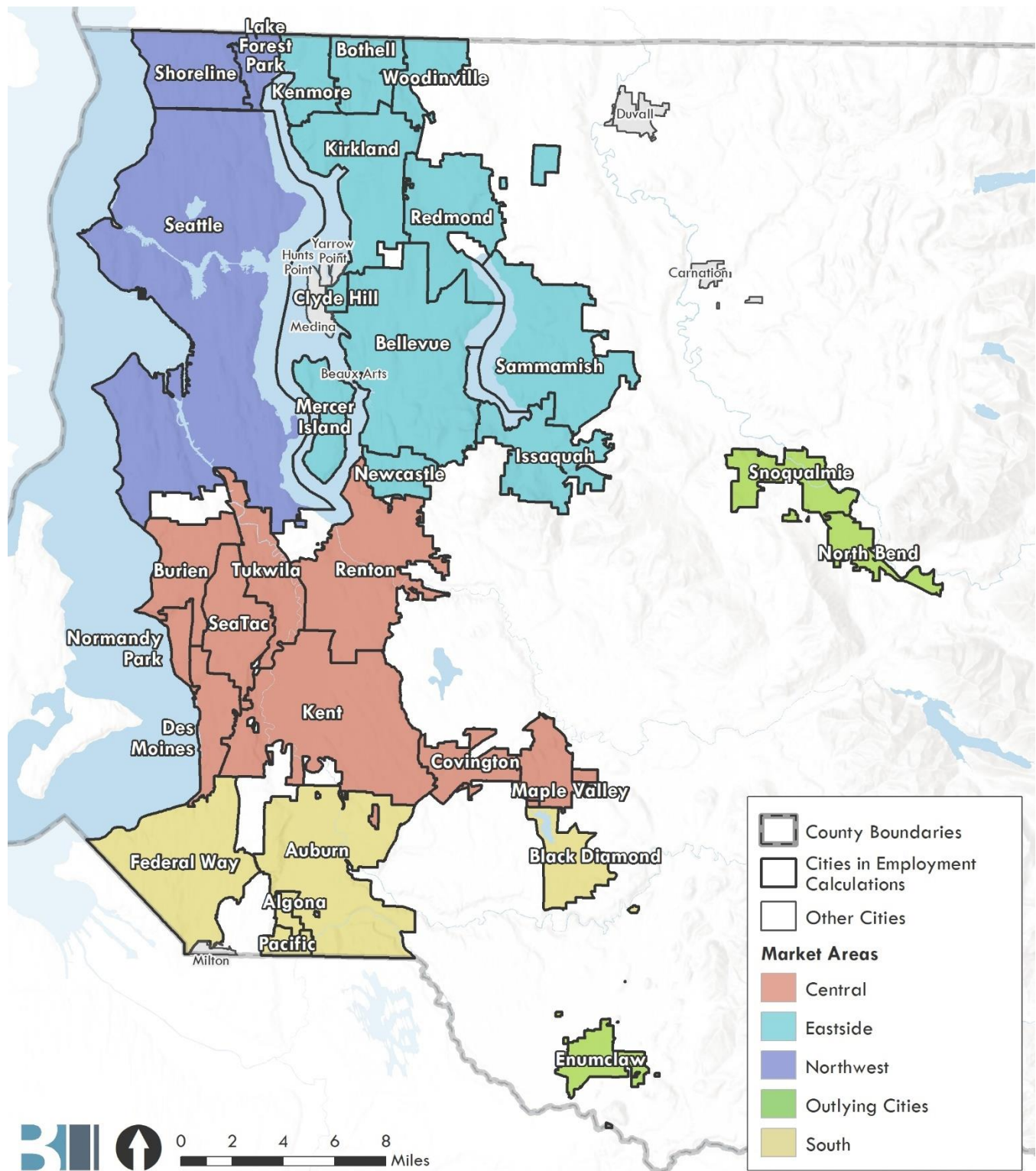
Exhibit 4 shows the total square feet per job in 2006 and 2019 for each of these market areas. While there was some variation between market areas, all areas except for South saw average square feet per job declines during this time period. In other words, employment density has been rising in most of 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

Edited June, 2021 for final report

Prepared by:



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.

Additional Comment from City of Sammamish, April 2021:

While the City's 2015 Comprehensive Plan did not include any gaps in service provision, the City's work with service providers as part of the 2021 Urban Growth Capacity Report pointed to several infrastructure gaps that could affect development of property to the full capacity allowed under City of Sammamish zoning. Some of these will be addressed by planned public improvements and/or will be made at the expense of developers. In many cases the effects of reported or identified gaps are difficult to pinpoint on specific properties. If left unaddressed, they could affect the desirability of developing in Sammamish, but the costs and environmental consequences of filling these gaps will also be factors in the decisions of citizens and developers to address them.

Sewer – A significant service capacity gap was identified related to wastewater/sewer in the north portion of the Sammamish Plateau Water service area due to the delay of necessary County regional infrastructure delivery (North Diversion). This capacity gap reduced Sammamish's land capacity by 62% for commercial/mixed use zones and 42% for residential zones. In addition to these capacity gaps, there were a few areas identified where a Lift Station would need to be constructed in order for sewer to become available which would require a capital investment of approximately a million dollars. There were also a few areas that would require a Critical Sewer Link, with multiple easement acquisitions needed as well as difficult construction. As such, the City felt it was unlikely that these areas would be redeveloped during the next planning period.

Traffic - There are several areas where concurrency requirements would trigger the need for additional infrastructure, consistent with the City's Transportation Improvements Program. With such improvements, most parcels could be developed to their zoned capacity. As the City updates its concurrency program to include segments and corridors, they expect to have transportation-related constraints along the two main corridors until funding for improvement is secured. There are also some parcels that could not be developed to their full zoned capacity without access improvements.

Schools - School districts serving the City indicated that most of their facilities in Sammamish are at or over base capacity and have limited capacity for expansion. Even with planned and funded capacity improvements some schools are projected to reach critical capacity within 10 years. While the City coordinates closely with the school districts on data

sharing, forecasting and reviewing Capital Facilities Plans, there are a limited number of vacant parcels in the city large enough to accommodate new schools. This means that building additional capacity in the future will be expensive and could involve using land zoned for other purposes. The costs of adding schools could affect future school tax levies, and overcrowding could affect the desirability of schools in the future.

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 projects** 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 Seattle** 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 remaining 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 DNRW 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:** $\geq 8"$ 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:** $\geq 8"$ main located within $\sim 1,000$ 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:** $\geq 12"$ main adjacent or within ~ 200 ft, preferred loop system existing. No low-pressure issues.
- **B:** $\geq 8"$ adjacent, or $\geq 12"$ main within $\sim 1,000$ ft. No pump station or pressure/treatment deficiencies.
- **C:** No nearby pipe. System deficiencies present.

Stormwater Tier Standards

- **A:** $\geq 12"$ public main adjacent or within ~ 200 ft, or ability to discharge to managed surface waters or on-site infiltration. No capacity issues.
- **B:** $\geq 12"$ 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 $(v/c) \leq 0.99$ (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.

Appendix H: Documentation of Market Factor and Infrastructure Assumptions

Appendix H: Documentation of Market Factor and Infrastructure Assumptions - Market Factor

This appendix documents specific assumptions on market factors used to calculate capacity and infrastructure gaps uncovered through the identification of land supply for development. The market factor table includes only jurisdictions and zones where the selected market factor deviates from the range suggested by the guidance in Appendix E. The infrastructure assumptions table includes identified infrastructure gaps by jurisdiction and service provider, as well as planned resolutions where known. Identified infrastructure gaps are intended to demonstrate jurisdictions' due diligence in identifying infrastructure-constrained lands, whether or not the constraint affected development potential.

Regional Geography	Jurisdiction	Zone	Zone Type	Suggested Market Factor (Description)	Suggested Market Factor (Range)	Selected Market Factor	Rationale for selected market factor, Notes
Core	Auburn	EP	MU	Low	1% - 10%	5%	This zone is no longer mapped
Unincorporated	Auburn PAAs	I	Ind	-	-	8%	Market Factor matches most closely related zone in affiliated city
Unincorporated	Auburn PAAs	R-4	SFR	-	-	15%	Market Factor matches most closely related zone in affiliated city
Unincorporated	Auburn PAAs	R-8	SFR	-	-	20%	Market Factor matches most closely related zone in affiliated city
Metro	Bellevue	EH-A	SFR	Low	1%-14%	0%	There is no land in this zoning category
Metro	Bellevue	EH-B	Ind/Comm	Low	1%-15%	0%	There is no land in this zoning category
Metro	Bellevue	EH-C	Ind/Comm	Low	1%-15%	0%	There is no land in this zoning category
Metro	Bellevue	EH-D	Ind/Comm	Low	1%-15%	15%	This is only 5 parcels in Northeast Bellevue
Unincorporated	Bellevue PAAs	R-1	SFR	-	-	10%	Market Factor matches most closely related zone in affiliated city
Unincorporated	Bellevue PAAs	R-4	SFR	-	-	10%	Market Factor matches most closely related zone in affiliated city
Cities and Towns	Black Diamond	B/IP	Comm/Ind	High	21% - 50%	70%	Conversion from mining to other forms of commercial development expected to take a long time.
Cities and Towns	Black Diamond	I	Ind	High	36% - 50%	70%	Uncertainty about the development of this zone. No development currently in industrial parcels.
Cities and Towns	Black Diamond	MDR8	MFR	High	36% - 50%	30%	Most of these parcels developed or have to plans to develop soon.
Unincorporated	Black Diamond PAAs	R-1	SFR	-	-	10%	Market Factor matches most closely related zone in affiliated city

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Regional Geography	Jurisdiction	Zone	Zone Type	Suggested Market Factor (Description)	Suggested Market Factor (Range)	Selected Market Factor	Rationale for selected market factor, Notes
Unincorporated	Black Diamond PAAs	R-4	SFR	-	-	10%	Market Factor matches most closely related zone in affiliated city
Unincorporated	Black Diamond PAAs	UR	SFR	-	-	20%	Market Factor matches most closely related zone in affiliated city
Unincorporated	Carnation PAAs	R-4	SFR	-	-	0%	Market Factor matches most closely related zone in affiliated city
Unincorporated	Carnation PAAs	UR	SFR	-	-	0%	Market Factor matches most closely related zone in affiliated city
Cities and Towns	Covington	MHO	MU	Medium	25% - 35%	10%	Avoid negative unit balance; there has been interest in zone with Development Pipeline.
Cities and Towns	Covington	MR	MFR	Medium	25% - 35%	0%	Lakepointe - added as pipeline/has development agreement/infrastructure is going in (Covington Connector).
Cities and Towns	Covington	R-1	SFR	Low	1% - 10%	10%	In range: Constrained, limited development
Cities and Towns	Covington	R-12	MFR	Medium	25% - 35%	0%	Lakepointe - added as pipeline/has development agreement/infrastructure is going in (Covington Connector).
Cities and Towns	Covington	R-4	SFR	Low	1% - 10%	1%	In range: Unlocked area with transportation investments
Cities and Towns	Covington	RCMU	MU	Medium	25% - 35%	0%	Lakepointe - added as pipeline/has development agreement/infrastructure is going in (Covington Connector).
Cities and Towns	Covington	TC	MU	Medium	25% - 35%	20%	Reduce due to investment in Civic Campus, SoCo Park, and developer purchase (Oakpointe).
Unincorporated	Covington PAAs	R-1	SFR	-	-	1%	Market Factor matches most closely related zone in affiliated city
HCT	Des Moines	RS-15,000	SFR	Low	1% - 9%	20%	Med - City understands properties, owners and potential to sell/develop

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Regional Geography	Jurisdiction	Zone	Zone Type	Suggested Market Factor (Description)	Suggested Market Factor (Range)	Selected Market Factor	Rationale for selected market factor, Notes
HCT	Des Moines	RS-4,000	SFR	Low	1% - 9%	20%	Med - City understands properties, owners and potential to sell/develop
HCT	Des Moines	RS-7,200	SFR	Low	1% - 9%	20%	Med - City understands properties, owners and potential to sell/develop
HCT	Des Moines	RS-8,400	SFR	Low	1% - 9%	20%	Med - City understands properties, owners and potential to sell/develop
HCT	Des Moines	RS-9,600	SFR	Low	1% - 9%	20%	Med - City understands properties, owners and potential to sell/develop
HCT	Des Moines	R-SE	SFR	Low	1% - 9%	20%	Med - City understands properties, owners and potential to sell/develop
HCT	Des Moines	R-SR	SFR	Low	1% - 9%	20%	Med - City understands properties, owners and potential to sell/develop
HCT	Des Moines	W-C North	Comm	Low	1% - 14%	20%	Med - local trends show lower market demand
Cities and Towns	Duvall	LI	Ind	Low	1% - 15%	15%	Only 1 lot left
Cities and Towns	Duvall	MT	MU	High	21% -50%	40%	mostly developed
Cities and Towns	Duvall	MUI	MU	High	21% -50%	50%	economic reality along BRR
Cities and Towns	Duvall	OT	MU	High	21% -50%	50%	Economy of Scale/cost issues / code
Cities and Towns	Duvall	R12	MFR	High	36% - 50%	40%	Most of zone is built out
Cities and Towns	Duvall	R20	MFR	High	36% - 50%	20%	There are 5 adjacent parcels zoned R20 that are yet to develop. It is likely that in the next planning horizon that most parcels will be developed. If one parcel did not develop, that would be 20% of the lots. We believe there is strong probability that all lots will develop in the planning horizon.
Cities and Towns	Duvall	R4	SFR	Low	1% - 10%	5%	Short plats

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Regional Geography	Jurisdiction	Zone	Zone Type	Suggested Market Factor (Description)	Suggested Market Factor (Range)	Selected Market Factor	Rationale for selected market factor, Notes
Cities and Towns	Duvall	R4.5	SFR	Low	1% - 10%	10%	Large lot estates with critical areas
Cities and Towns	Duvall	R6	SFR	Low	1% - 10%	10%	Mostly built-out - some individual infill
Cities and Towns	Duvall	R8	SFR	Low	1% - 10%	5%	area of high development activity/interest
Cities and Towns	Duvall	UT1	MU	High	21% -50%	50%	Economy of Scale/cost issues / code issues
Unincorporated	Duvall PAAs	CB	MU	-	-	50%	Market Factor matches most closely related zone in affiliated city
Unincorporated	Duvall PAAs	R-4	SFR	-	-	5%	Market Factor matches most closely related zone in affiliated city
Unincorporated	Duvall PAAs	UR	SFR	-	-	10%	Market Factor matches most closely related zone in affiliated city
Cities and Towns	Enumclaw	R-4	MU	High	36% - 50%	50%	*Low interest and historical performance in MFR in Enumclaw. 2021 Planning Commision is considering Multi-Famliy Tax Exemption to increase development in MFR. Amrket Factor may change over time.
Unincorporated	Enumclaw PAAs	NB	MU	-	-	50%	Market Factor matches most closely related zone in affiliated city
Unincorporated	Enumclaw PAAs	UR	SFR	-	-	5%	Market Factor matches most closely related zone in affiliated city
HCT	Federal Way PAAs	CB	MU	Low	5% - 15%	15%	same as FW
HCT	Federal Way PAAs	NB	MU	Low	5% - 15%	15%	same as FW
HCT	Federal Way PAAs	O	Comm	Medium	11% - 20%	15%	same as FW

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Regional Geography	Jurisdiction	Zone	Zone Type	Suggested Market Factor (Description)	Suggested Market Factor (Range)	Selected Market Factor	Rationale for selected market factor, Notes
HCT	Federal Way PAAs	R-1	SFR	Medium	15% - 20%	20%	High end of range for FW. Some adjustment from FW's 18% to reflect that some residential areas of FW are unsewered and this may impact potential rate of development, redevelopment coming forward. Within range applied in Auburn for SFR (15% and 20%) Much lower than proposed range for Pacific (11-40%) Higher than Newcastle (HCT - 14%)
HCT	Federal Way PAAs	R-12	MFR	Low	5% - 15%	10%	High end of range c/f FW (L-5-10% for Core Cities, not 5-15%) to reflect potential for some limited unsewered areas? (Need to check) This may impact potential rate of development, redevelopment coming forward. Market Factor is same as Newcastle (HCT). Suggested range for Pacific (cities and towns) though is High at 36% - 50%. (Is likely redevelopment of MFR in Federal Way more in line with Pacific future MFR development assumptions?)
Core	Issaquah	CBD	MU	Medium	11% - 20%	25%	Recently adopted regulations make it more difficult to develop in the CBD
Core	Issaquah	C-RES	SFR	Low	1% - 14%	25%	Access to these parcels is difficult. In order to build out entire parcels, bridges need to be constructed.
Core	Issaquah	UV-EV	Development Agreement	Medim	11% - 20%	NA	This Development Agreement sunsetted in 2017
Unincorporated	Issaquah PAAs	R-1	SFR	-	-	14%	Market Factor matches most closely related zone in affiliated city
Unincorporated	Issaquah PAAs	R-24	MFR	-	-	15%	Market Factor matches most closely related zone in affiliated city
Unincorporated	Issaquah PAAs	UR	SFR	-	-	12%	Market Factor matches most closely related zone in affiliated city

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Regional Geography	Jurisdiction	Zone	Zone Type	Suggested Market Factor (Description)	Suggested Market Factor (Range)	Selected Market Factor	Rationale for selected market factor, Notes
Core	Kent	CC	MU	Medium	11% - 20%	11%	More likely to redevelop in the future, if financial incentives and revised commercial standards.
Core	Kent	CC-MU	MU	Medium	11% - 20%	11%	More likely to redevelop
Core	Kent	CM-1/I1	Comm/Ind	Low	1% -15%	5%	***** Note. Now I1 *****
Core	Kent	CM-2/ CM	Comm/Ind	Low	1% -15%	15%	***** Note. Now only CM ***** Mostly developed with properties unlikely to redevelop.
Core	Kent	DC	MU	Medium	11% - 20%	20%	Small one block (Historic) area of town that is not likely to redevelop without significant investment.
Core	Kent	DCE	MU	Medium	11% - 20%	20%	Downtown, unlimited height, MFTE but has not seen significant development.
Core	Kent	DCE-T	MU	Medium	11% - 20%	20%	Small transitional zone, less likely to see redevelopment.
Core	Kent	GC	MU	Medium	11% - 20%	11%	More likely to redevelop
Core	Kent	GC-MU	MU	Medium	11% - 20%	11%	More likely to redevelop
Core	Kent	M1/ I1	Ind	Low	1% -15%	5%	***** Note, now I1*****
Core	Kent	M1-C/ I1	Ind	Low	1% -15%	5%	***** Note, now I1*****
Core	Kent	M2/ I2	Ind	Low	1% -15%	5%	***** Note, now I2*****
Core	Kent	M3/ I2	Ind	Low	1% -15%	5%	***** Note, now I3*****
Core	Kent	MCR	MU	Medium	11% - 20%	11%	Midway, Gracious height limit, MFTE, Sound transit, most likely to see redevelopment
Core	Kent	MHP	SFR	Low	5% - 10%	10%	Mobile home parks require one year notice and other land use designations to be redeveloped. Existing parks are maxed out on density.
Core	Kent	MR-D	MFR	Medium	11% - 20%	15%	Possible increased density after middle housing ordinance
Core	Kent	MR-G	MFR	Medium	11% - 20%	20%	Minimal Redevelopable multifamily left.
Core	Kent	MR-H	MFR	Medium	11% - 20%	20%	Minimal Redevelopable multifamily left.
Core	Kent	MR-M	MFR	Medium	11% - 20%	20%	Minimal Redevelopable multifamily left.
Core	Kent	MR-T12	MFR	Medium	11% - 20%	15%	Possible increased density after middle housing ordinance
Core	Kent	MR-T16	MFR	Medium	11% - 20%	15%	Possible increased density after middle housing ordinance

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Regional Geography	Jurisdiction	Zone	Zone Type	Suggested Market Factor (Description)	Suggested Market Factor (Range)	Selected Market Factor	Rationale for selected market factor, Notes
Core	Kent	MTC-1	MU	Medium	11% - 20%	11%	Midway, Gracious height limit, MFTE, Sound transit, most likely to see redevelopment
Core	Kent	MTC-2	MU	Medium	11% - 20%	11%	Midway, Gracious height limit, MFTE, Sound transit, most likely to see redevelopment
Core	Kent	NCC	Comm	High	21% - 50%	50%	Very Minimal NCC land left to redevelop and little vacancy. Requiring full redevelopment.
Core	Kent	SR-1	SFR	Low	1-14%	14%	Lots of large rural properties and critical areas with not a high redevelopment potential. Market Guidance states 1-14% for LOW alignment is acceptable for Core Cities. Assuming 14% of land is not Redevelopable due to hold outs and large lots that are not Redevelopable without tearing down the main home.
Core	Kent	SR-3	SFR	Low	1-14%	14%	Lots of large rural properties and critical areas with not a high redevelopment potential. Market Guidance states 1-14% for LOW alignment is acceptable for Core Cities. Assuming 14% of land is not Redevelopable due to hold outs and large lots that are not Redevelopable without tearing down the main home.
Core	Kent	SR-4.5	SFR	Low	1-14%	10%	Most likely to redevelop and have increased density after middle housing ordinance
Core	Kent	SR-6	SFR	Low	1-14%	10%	Most likely to redevelop and have increased density after middle housing ordinance
Core	Kent	SR-8	SFR	Low	1-14%	5%	Possible increased density after middle housing ordinance, likely less than SR 4.5 and SR 6 due to the smaller minimum lot sizes.
Unincorporated	Kent PAAs	I	Ind	-	-	5%	Market Factor matches most closely related zone in affiliated city
Unincorporated	Kent PAAs	M	Nat Res	-	-	0%	Market Factor matches most closely related zone in affiliated city

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Regional Geography	Jurisdiction	Zone	Zone Type	Suggested Market Factor (Description)	Suggested Market Factor (Range)	Selected Market Factor	Rationale for selected market factor, Notes
Unincorporated	Kent PAAs	NB	MU	-	-	11%	Market Factor matches most closely related zone in affiliated city
Unincorporated	Kent PAAs	R-1	SFR	-	-	14%	Market Factor matches most closely related zone in affiliated city
Unincorporated	Kent PAAs	R-12	MFR	-	-	15%	Market Factor matches most closely related zone in affiliated city
Unincorporated	Kent PAAs	R-4	SFR	-	-	10%	Market Factor matches most closely related zone in affiliated city
Unincorporated	Kent PAAs	R-6	SFR	-	-	10%	Market Factor matches most closely related zone in affiliated city
Unincorporated	Kent PAAs	RA-5	SFR	-	-	14%	Market Factor matches most closely related zone in affiliated city
Cities and Towns	Maple Valley	REC	Ind/Comm	High	36% - 50%	20%	We are seeing applications & preapplications for projects in this zone
HCT	Mercer Island	B	Comm	Medium	15% - 25%	18%	Middle of range; little development activity in this zone, but few properties are in this zone.
HCT	Mercer Island	MF-2L	MFR	High	16% - 30%	20%	Little redevelopment in recent years; however, there are periodic inquiries and pre-application meetings regarding redevelopment.
HCT	Mercer Island	R-8.4	SFR	Low	1% - 9%	3%	Middle of range; redevelopment is consistent.
HCT	Mercer Island	TCMF-3	MU	High	26% - 50%	10%	There has been a recent uptick in inquiries, pre-application meetings, and building permits for new development in the TC zones, which staff attribute to the planned opening of the light rail station in 2023. The light rail station is proposed to be adjacent to and within walking distance of the Town Center zone.
Cities and Towns	Milton	RM	SFR	High	41% - 50%	0%	Last few places likely to develop over the next 20 years
Cities and Towns	Milton	RS	SFR	High	41% - 50%	0%	Last few places likely to develop over the next 20 years

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Regional Geography	Jurisdiction	Zone	Zone Type	Suggested Market Factor (Description)	Suggested Market Factor (Range)	Selected Market Factor	Rationale for selected market factor, Notes
Unincorporated	Milton PAAs	R-4	SFR	-	-	0%	Market Factor matches most closely related zone in affiliated city
Unincorporated	Milton PAAs	R-6	SFR	-	-	0%	Market Factor matches most closely related zone in affiliated city
Unincorporated	Newcastle PAAs	R-1	SFR	-	-	10%	Market Factor matches most closely related zone in affiliated city
Cities and Towns	North Bend	CLDR	SFR	Low	1% - 10%	30%	North Bend saw no CLDR develop in the past 10 years, and there has been little to no interest to date. The combination of lower density with the same infrastructure costs of other residential means redevelopment may not pencil. Also, these properties tend to already be ones with larger homes on larger lots, owners may be less interested to subdivide.
Cities and Towns	North Bend	EP-1	Comm/Ind	High	36% - 50%	25%	Sewer ULID is coming to these lands, increasing interest in properties
Cities and Towns	North Bend	EP-2	Comm/Ind	High	36% - 50%	25%	Large tracts of industrial lands near an interstate are unique for King County
Unincorporated	North Bend PAAs	RA-2.5	SFR	-	-	10%	Market Factor matches most closely related zone in affiliated city
Unincorporated	North Bend PAAs	UR	SFR	-	-	4%	Market Factor matches most closely related zone in affiliated city
Unincorporated	Pacific PAAs	R-4	SFR	-	-	30%	Market Factor matches most closely related zone in affiliated city
Core	Redmond	AP	MU	Low	5%-10%	7%	Downtown, higher demand, lower market factor
Core	Redmond	BC	MU	Low	5%-10%	7%	Downtown, higher demand, lower market factor
Core	Redmond	BP	Comm	Low	1%-10%	5%	Higher demand for office, medium market factor
Core	Redmond	EH	MU	Low	5%-10%	7%	Downtown, higher demand, lower market factor
Core	Redmond	GC	Comm	Low	1%-10%	5%	Higher demand for office, medium market factor
Core	Redmond	I	Ind	Medium	16%-35%	35%	Preserve industrial and lower interest, high market factor

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Regional Geography	Jurisdiction	Zone	Zone Type	Suggested Market Factor (Description)	Suggested Market Factor (Range)	Selected Market Factor	Rationale for selected market factor, Notes
Core	Redmond	MDD1	MU	Low	5%-10%	7%	SE Redmond/Station Area, high demand, lower market factor
Core	Redmond	MDD2	MU	Low	5%-10%	7%	SE Redmond/Station Area, high demand, lower market factor
Core	Redmond	MDD3	MU	Low	5%-10%	7%	SE Redmond/Station Area, high demand, lower market factor
Core	Redmond	MDD4	Comm	Low	1%-10%	10%	MDD4: manufcaturing, existing uses, higher market factor
Core	Redmond	MDD5	MU	Low	5%-10%	10%	MDD5: longer time horizon for buildings to turn over, higher market factor
Core	Redmond	MP	Ind	Medium	16%-35%	35%	Preserve manufacturing and lower interest, high market factor
Core	Redmond	OBAT	MU	Low	5%-10%	5%	Overlake more likely to redevelop, lower market factor
Core	Redmond	OT	MU	Low	5%-10%	10%	Historic area, higher market factor
Core	Redmond	OV 1	MU	Low	5%-10%	5%	Overlake more likely to redevelop, lower market factor
Core	Redmond	OV 2	MU	Low	5%-10%	5%	Overlake more likely to redevelop, lower market factor
Core	Redmond	OV 3	MU	Low	5%-10%	5%	Overlake more likely to redevelop, lower market factor
Core	Redmond	OV 4	MU	Low	5%-10%	5%	Overlake more likely to redevelop, lower market factor
Core	Redmond	OV 5	MU	Low	5%-10%	5%	Overlake more likely to redevelop, lower market factor
Core	Redmond	R-1	SFR	Low	1%-14%	10%	Single family zones less likely to redevelop, higher market factor
Core	Redmond	R-12	MFR	Low	5%-10%	7%	Multifamily: interest in redevelopment, medium
Core	Redmond	R-18	MFR	Low	5%-10%	7%	Multifamily: interest in redevelopment, medium
Core	Redmond	R-2	SFR	Low	1%-14%	10%	Single family zones less likely to redevelop, higher market factor
Core	Redmond	R-20	MFR	Low	5%-10%	7%	Multifamily: interest in redevelopment, medium

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Regional Geography	Jurisdiction	Zone	Zone Type	Suggested Market Factor (Description)	Suggested Market Factor (Range)	Selected Market Factor	Rationale for selected market factor, Notes
Core	Redmond	R-3	SFR	Low	1%-14%	10%	Single family zones less likely to redevelop, higher market factor
Core	Redmond	R-30	MFR	Low	5%-10%	7%	Multifamily: interest in redevelopment, medium
Core	Redmond	R-4	SFR	Low	1%-14%	10%	Single family zones less likely to redevelop, higher market factor
Core	Redmond	R-5	SFR	Low	1%-14%	10%	Single family zones less likely to redevelop, higher market factor
Core	Redmond	R-6	SFR	Low	1%-14%	10%	Single family zones less likely to redevelop, higher market factor
Core	Redmond	R-8	SFR	Low	1%-14%	10%	Single family zones less likely to redevelop, higher market factor
Core	Redmond	RA-5	SFR	Low	1%-14%	10%	Single family zones less likely to redevelop, higher market factor
Core	Redmond	RIN	SFR	Low	1%-14%	10%	Single family zones less likely to redevelop, higher market factor
Core	Redmond	RVBD	MU	Low	5%-10%	7%	Downtown, higher demand, lower market factor
Core	Redmond	SMT	MU	Low	5%-10%	7%	Downtown, higher demand, lower market factor
Core	Redmond	TR	MU	Low	5%-10%	7%	Downtown, higher demand, lower market factor
Core	Redmond	TSQ	MU	Low	5%-10%	7%	Downtown, higher demand, lower market factor
Core	Redmond	TWNC	MU	Low	5%-10%	7%	Downtown, higher demand, lower market factor
Core	Redmond	UR	SFR	Low	1%-14%	10%	Single family zones less likely to redevelop, higher market factor
Core	Redmond	VV	MU	Low	5%-10%	7%	Downtown, higher demand, lower market factor
Unincorporated	Redmond PAAs	R-1	SFR	-	-	10%	Market Factor matches most closely related zone in affiliated city
Unincorporated	Redmond PAAs	R-24	MFR	-	-	7%	Market Factor matches most closely related zone in affiliated city
Unincorporated	Redmond PAAs	R-4	SFR	-	-	10%	Market Factor matches most closely related zone in affiliated city
Unincorporated	Redmond PAAs	R-6	SFR	-	-	10%	Market Factor matches most closely related zone in affiliated city

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Regional Geography	Jurisdiction	Zone	Zone Type	Suggested Market Factor (Description)	Suggested Market Factor (Range)	Selected Market Factor	Rationale for selected market factor, Notes
Unincorporated	Redmond PAAs	R-8	SFR	-	-	10%	Market Factor matches most closely related zone in affiliated city
Core	Renton	CA	Comm	Medium	11%-20%	11%	Predominant use is expected to be commercial and office
Core	Renton	CO	Comm	Medium	11%-20%	15%	Predominant use is expected to be commercial and office
Core	Renton	CO (TOD)	MU	High	21%-35%	20%	Expect slightly higher demand over the twenty year horizon than specified in suggested range
Core	Renton	COR	Comm	Medium	11%-20%	15%	High demand already expressed; including multiple entitled applications
Core	Renton	IH	Ind/Comm	Low	1%-15%	30%	Not a lot left; what is built is well utilized; not likely to redevelop
Core	Renton	IL	Ind/Comm	Low	1%-15%	20%	Available properties do not allow warehouse distribution thereby limiting demand
Core	Renton	IM	Ind/Comm	Low	1%-15%	25%	Available properties do not allow warehouse distribution thereby limiting demand
Core	Renton	R-10	MFR	High	21%-35%	20%	Townhomes allowed in zone; expect higher market demand as a result
Core	Renton	R-14	MFR	High	21%-35%	15%	Townhomes allowed in zone; expect higher market demand as a result
Core	Renton	UC	Comm	Medium	11%-20%	15%	Restrictive standards apply to properties for sale; properties do not allow residential
HCT	Renton PAAs	I	Ind	Low	1% - 15%	30%	very little land available
HCT	Renton PAAs	O	Comm	Medium	11% - 20%	10%	only one parcel in this zone
Unincorporated	Sammamish PAAs	R-1	SFR	-	-	10%	Market Factor matches most closely related zone in affiliated city
Unincorporated	Sammamish PAAs	R-4	SFR	-	-	10%	Market Factor matches most closely related zone in affiliated city
Unincorporated	Sammamish PAAs	RA-5	SFR	-	-	10%	Market Factor matches most closely related zone in affiliated city
Unincorporated	Sammamish PAAs	UR	SFR	-	-	10%	Market Factor matches most closely related zone in affiliated city

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Regional Geography	Jurisdiction	Zone	Zone Type	Suggested Market Factor (Description)	Suggested Market Factor (Range)	Selected Market Factor	Rationale for selected market factor, Notes
Core	SeaTac	AVC (Outside Urban Center)	Ind	High	10% -20%	50%	Parcels in this zoning are controlled by the Port of Seattle. While larger contiguous parcels outside of the flight path are more likely to be develop for lease at higher densities, much of this space has additional restrictions.
Core	SeaTac	AVO	Other	N/A	N/A	100%	This zone is specifically for Port of Seattle operational uses related to the SeaTac International Airport. Due to this use of land is not directly tied to number of jobs or residential units. Much of this land encompasses runways, and other operations areas that are unbuildable or have no direct relationship with job locations.
Core	SeaTac	CB-C	MU	High	21%-35%	50%	This zoning district has several factors creating a perceived higher market factor than the suggested range. These include Airport Related parking lots that remain extremely lucrative with minimal investment, Historic Under Investment tied to airport proximity and overall trends within South King County, Small groups of property owners controlling large amounts of land with conservative development history, long-term land leases of 30-50 years taking up large swatches of land, FAA height restrictions that are based project to project creating development uncertainty, and lack of financial comparables in the immediate area for denser developments.
Core	SeaTac	HDS-OZ	SFR	Medium	15%-20%	20%	Only 9 unit capacity

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Regional Geography	Jurisdiction	Zone	Zone Type	Suggested Market Factor (Description)	Suggested Market Factor (Range)	Selected Market Factor	Rationale for selected market factor, Notes
Core	SeaTac	I	Ind	High	36%-50%	10%	There is relatively little vacant or redevelopable industrial land in SeaTac. One potential area has a project in the early stages of development, and another has seen increased interest, in line with regional trends. Desire for industrial land has been perceived as high based on recent inquiries to staff.
Core	SeaTac	MHP	SFR	Medium	15%-20%	100%	We do not expect any MHP developments going forward based on comp plan designations and minimum park sizes for new developments.
Core	SeaTac	NB	Comm	Low	11%-20%	40%	This is a very small number of redevelopable parcels contingent upon future lot consolidations, and is expected to see less redevelopment due to the increased complexity and profitable non-conforming airport parking uses.
Core	SeaTac	O/C/MU	MU	High	21%-35%	35%	Many smaller parcels, and existing single-family would require substantial consolidation.
Core	SeaTac	OCM	MU	High	21%-35%	75%	This represents almost exclusively the single-family areas adj to Cedarbrook Hotel, and behind the Masterpark Garage. Any redevelopment will require substantial consolidation and demo of SF units.
Core	SeaTac	P	Other	N/A	N/A	100%	Parcels zoned "Parks" are anticipated as solely for this purpose and do not anticipate
Core	SeaTac	RBX (North of SR 509 ext)	MU	High	21%-35%	11%	This area contains a large amount of surface parking adjacent to a light rail station, has the potential for high density mixed use and commercial uses and eligibility for a MFTE should facilitate desirability for redevelopment.

Appendix H: Documentation of Market Factor and Infrastructure Assumptions - Market Factor

Regional Geography	Jurisdiction	Zone	Zone Type	Suggested Market Factor (Description)	Suggested Market Factor (Range)	Selected Market Factor	Rationale for selected market factor, Notes
Core	SeaTac	RBX (South of SR 509 ext)	Ind	High	36%-50%	40%	A significant consolidation underway in about 1/2 of single-family residential parcels for future project. However, a significant amount of overall redevelopable land area exists within single-family parcels that would require a significant consolidation, of which no efforts to date are known.
Core	SeaTac	T (In Urban Center)	MFR	High	21%-35%	50%	Almost entirely single-family residential parcels. Significant lot consolidation would be required for redevelopment. Staff not aware of any major efforts to do so.
Core	SeaTac	T (Outside Urban Center)	MFR	High	21%-35%	50%	Almost entirely single-family residential parcels. Significant lot consolidation would be required for redevelopment. Staff not aware of any major efforts to do so.
Core	SeaTac	UH-1,800	MFR	High	21%-35%	35%	A decent chunk of redevelopable land in this zone is adjacent to SR 509 extension, will likely limit density slightly.
Core	SeaTac	UH-900	MFR	High	21%-35%	35%	Segale (steep slope area), Angle Lake MHP and S. IB (historically low-density development area) are primary areas of redevelopment capacity.
Core	SeaTac	UH-UCR	MFR	High	21%-35%	50%	Much the redevelopable land in this zone exists in single-family parcels on lots ~10,000 sqft making redevelopment at expected density difficult.
Core	SeaTac	UL-15,000	SFR	Medium	15%-20%	40%	40% of parcels do not yet have immediate sewer access.

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Regional Geography	Jurisdiction	Zone	Zone Type	Suggested Market Factor (Description)	Suggested Market Factor (Range)	Selected Market Factor	Rationale for selected market factor, Notes
Core	SeaTac	UL-7,200	SFR	Medium	15%-20%	60%	About 20% of original capacity was removed based on minimum lot sizes (see UL, ShortPlatExercise Spreadsheet), not distinguishing between left over squarefootage in potential short plats vs. land area that would be contiguous and usable for additional SF parcels. Market Factor was also increased based on likelihood of existing home placement requiring a teardown to complete short plat to max number of lots.
Core	SeaTac	UL-9,600	SFR	Medium	15%-20%	60%	12 of 22 potential lots don't have immediate sewer access.
Metro	Seattle	C (commercial)	MU	Low	5%-10%	10% - 40%	varies across 10 maket areas for 5 product types with each zone assigned a single type; applied to the capacity, not the land; no differentiation between vacant and redev
Metro	Seattle	D (downtown)	MU	Low	5%-10%	10% - 40%	varies across 10 maket areas for 5 product types with each zone assigned a single type; applied to the capacity, not the land; no differentiation between vacant and redev
Metro	Seattle	HR (highrise multi-family)	MF	Low	5%-10%	5% - 25%	varies across 10 maket areas for 5 product types with each zone assigned a single type; applied to the capacity, not the land; no differentiation between vacant and redev
Metro	Seattle	I (industrial)	IND	Low	1%-15%	25%	varies across 10 maket areas for 5 product types with each zone assigned a single type; applied to the capacity, not the land; no differentiation between vacant and redev
Metro	Seattle	L (lowrise multi-family)	MF	Low	5%-10%	10% - 40%	varies across 10 maket areas for 5 product types with each zone assigned a single type; applied to the capacity, not the land; no differentiation between vacant and redev

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Regional Geography	Jurisdiction	Zone	Zone Type	Suggested Market Factor (Description)	Suggested Market Factor (Range)	Selected Market Factor	Rationale for selected market factor, Notes
Metro	Seattle	MR (midrise multi-family)	MF	Low	5%-10%	5% - 25%	varies across 10 maket areas for 5 product types with each zone assigned a single type; applied to the capacity, not the land; no differentiation between vacant and redev
Metro	Seattle	NC (neighborhood commercial)	MU	Low	5%-10%	10% - 40%	varies across 10 maket areas for 5 product types with each zone assigned a single type; applied to the capacity, not the land; no differentiation between vacant and redev
Metro	Seattle	RSL (residential small lot)	SF	Low	1%-14%	10% - 40%	varies across 10 maket areas for 5 product types with each zone assigned a single type; applied to the capacity, not the land; no differentiation between vacant and redev
Metro	Seattle	SF (single-family)	SF	Low	1%-14%	20% - 35%	varies across 10 maket areas for 5 product types with each zone assigned a single type; applied to the capacity, not the land; no differentiation between vacant and redev
Metro	Seattle	SM (seattle mixed)	MU	Low	5%-10%	10% - 40%	varies across 10 maket areas for 5 product types with each zone assigned a single type; applied to the capacity, not the land; no differentiation between vacant and redev
Cities and Towns	Snoqualmie	Business Office (BO)	Comm	Medium	11% - 20%	15%	Slow turnover of mostly existing homes
Cities and Towns	Snoqualmie	Business Retail 1 (BR)	Comm	Medium	11% - 20%	25%	We've not seen any redevelopment in the last 20 years
Cities and Towns	Snoqualmie	Constrained Residential	SFR	Low	1% - 10%	75%	Significant vacant land in floodway
Cities and Towns	Snoqualmie	Office Park (OP)	Comm	Medium	11% - 20%	45%	Owned by Snoqualmie Tribe, significant redevelopment not anticipated
Cities and Towns	Snoqualmie	Planned Commercial/Industrial (PCI)	Comm/Ind	High	36% - 50%	40%	Per DEIS

Appendix H: Documentation of Market Factor and Infrastructure Assumptions - Market Factor

Regional Geography	Jurisdiction	Zone	Zone Type	Suggested Market Factor (Description)	Suggested Market Factor (Range)	Selected Market Factor	Rationale for selected market factor, Notes
Cities and Towns	Snoqualmie	R-1-10	SFR	Low	1% - 10%	35%	Accessibility issues on only parcel with redevelopment potential. Other parts of zone contain new homes
Unincorporated	Snoqualmie PAAs	RA-10	SFR	-	-	10%	Market Factor matches most closely related zone in affiliated city
Unincorporated	Snoqualmie PAAs	RA-5	SFR	-	-	10%	Market Factor matches most closely related zone in affiliated city
Unincorporated	Snoqualmie PAAs	UR	SFR	-	-	10%	Market Factor matches most closely related zone in affiliated city
Unincorporated	Tukwila PAAs	R-1	SFR	-	-	20%	Market Factor matches most closely related zone in affiliated city
HCT	Woodinville	CBD (Central Business District)	MU	Low	5% - 10%	1%	Lots of future development expected in this zone. All vacant properties currently under development.
HCT	Woodinville	GB (General Business)	Comm	Low	1% - 14%	20%	Lots of critical areas and barriers to development. Minimal turnover of properties in the last 20 years. Lots of industrial development currently, little interest in conversion to commercial.
HCT	Woodinville	O (Office)	Comm	Low	1% - 14%	50%	Already very built out. Remaining parcel have barriers to development
HCT	Woodinville	P/I (Public Institutional)	Other	Low	N/A	N/A	Fire department might move, may become vacant over the planning period
HCT	Woodinville	R-18	MFR	Low	5% - 10%	5%	Built out
HCT	Woodinville	R-24	MFR	Low	5% - 10%	80%	Built out
HCT	Woodinville	R-48	MFR	Low	5% - 10%	100%	Built out, entirely senior housing development
Cities and Towns	Yarrow Point	R12	SFR	Low	1% - 10%	0%	All land is expected to be developed by 2044
Cities and Towns	Yarrow Point	R15	SFR	Low	1% - 10%	0%	All land is expected to be developed by 2044

Appendix H: Documentation of Market Factor and Infrastructure Assumptions - Infrastructure

Jurisdiction	Service Provider	Infrastructure Type	Service Deficiencies	Planned Investments	Infrastructure Gap Present?	Additional Notes
Bellevue	City of Bellevue	Sewer	Sewer line capacity for potential growth anticipated in Wilburton subarea	Sewer capacity improvements for future growth CIP projects Wilburton sewer capacity upgrade	No	
Bellevue	City of Bellevue	Sewer	Pump station, pipeline, monitoring and minor projects for renewal and replacement throughout the city	Sewer infrastructure renewal and replacement CIP projects - Sewer Pump Station Improvements - Midlakes Pump Station - Sewer System Pipeline Major Repairs - Lake Washington Sewer Lake Line Assessment Program - Sewer System Pipeline Replacement - Lakeline Sewer Replacement - Minor (Small) Capital Improvement Projects - I&I Investigations and Flow Monitoring	No	
Bellevue	City of Bellevue	Sewer	Portions of the Bridle Trails and Lakemont neighborhoods on septic.	Areas are currently designated for low density residential allowing for development to occur by septic. Only if a parcel is located within 200 feet of a sewer main is parcel required to hook up to the sewer system.	No	
Bellevue	City of Bellevue	Water	Water storage, supply and facilities for future growth in West Operating Area and BelRed	Water capacity improvements for future growth CIP projects - Increase Drinking Water Storage Availability for West Operating Area - New Water Inlet Station - Water Facilities for NE Spring Blvd Multi Modal Corridor - NE 40th and Enatai Inlet Water Supply Station Improvements	No	

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Jurisdiction	Service Provider	Infrastructure Type	Service Deficiencies	Planned Investments	Infrastructure Gap Present?	Additional Notes
Bellevue	City of Bellevue	Water	Water infrastructure renewal and replacement throughout the city	Water infrastructure renewal and replacement CIP projects - Small Diameter Water Main Replacement - Pressure Reducing Valve (PRV) Rehabilitation - Minor (Small) Water Capital Improvement Projects - Fire Hydrant Standardization - Reservoir Rehabilitation or Replacement - Water Pump Station Rehabilitation or Replacement - Replacement of Large Commercial Water Meters - Water Service Line & Saddle Replacement Program	No	
Bellevue	City of Bellevue	Stormwater	Stormwater infrastructure renewal and replacement	Stormwater infrastructure renewal and replacement CIP projects - Minor (Small) Storm Capital Improvement Projects - Storm System Conveyance Repairs and Replacement - Replace Coal Creek Pkwy Culvert at Coal Creek - Replace NE 8th St Culvert at Kelsey Creek - Stormwater Video Inspection Enhancement	No	

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Jurisdiction	Service Provider	Infrastructure Type	Service Deficiencies	Planned Investments	Infrastructure Gap Present?	Additional Notes
Bellevue	City of Bellevue	Stormwater	Stormwater projects for environmental preservation throughout the city with specific projects around Coal Creek and Kelsey Creek	Stormwater infrastructure for environmental preservation CIP projects - Fish Passage Improvement Program - Stream Channel Modification Program - Flood Control Program - Stream Restoration for Mobility & Infrastructure Initiative - Lower Coal Creek Flood Hazard Reduction Phase 1 - Storm Water Quality Retrofit in Kelsey Creek	No	
Bellevue	City of Bellevue	Transportation	Level of Service standards are projected to fail in three mobility management areas (2, 6 and 9) in the future if no adjustments are made to capacity, transportation demand management or to how levels of transportation services are measured.	The Mobility Implementation Plan is getting underway in 2020 to explore best practices for integration of multi-modal planning. Adoption is anticipated in 2021. Adjustments to planning along with CIP investments anticipated to accommodate future capacity for growth.	No	
Black Diamond	City of Black Diamond	Water	Supplemental water source currently being sought	System improvements to accommodate growth	Only where designated restricted	
Black Diamond	Covington Water District	Water	Supplemental water source currently being sought	System improvements to accommodate growth	Only where designated restricted	
Black Diamond	Soos Creek Sewer District	Sewer	Capacity for 2 future planned developments	System improvements to accommodate growth	Only where designated restricted	

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Jurisdiction	Service Provider	Infrastructure Type	Service Deficiencies	Planned Investments	Infrastructure Gap Present?	Additional Notes
Black Diamond	City of Black Diamond	Stormwater	None	None	No	
Burien	Southwest Suburban Sewer District	Sewer	Gaps is distances to sewer connections	Developer extensions	Yes	
Burien	Valley View Sewer District	Sewer	Gaps is distances to sewer connections	Developer extensions	Yes	
Burien	Midway Sewer District	Sewer	None identified	None identified	None identified	
Burien	Water District 20	Water	None identified	Water main improvement on 1st Avenue South under construction	None identified	
Burien	Water District 49	Water	None identified	Reservoir under construction	None identified	
Burien	Water District 125	Water	None identified	None identified	Very minimal land in Burien	
Burien	Highline Water District	Water	None identified	None identified	None identified	
Burien	Seattle Public Utilities	Water	None identified	None identified	Area is genrally built out	
Burien	City of Burien Stormwater	Storm Water	None identified	Captical Facilities Plan	None identified	
Covington	Covington Water District	Water	None identified	see attached summary document and maps	No	

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Jurisdiction	Service Provider	Infrastructure Type	Service Deficiencies	Planned Investments	Infrastructure Gap Present?	Additional Notes
Covington	Lake Meridian Water District (Dist 111)	Water	None identified	see attached summary document and maps	No	
Covington	City of Covington	Stormwater	None identified	see attached summary document and maps	No	
Covington	Multiple Jurisdictions	Transportation	None identified	see attached summary document and maps	No	
Covington	Soos Creek Sewer and Water	Sewer	Some parcels not within 200ft of a sewer line also have on-site septic, and could need upgrading should redevelopment occur, however conversations with Covington Planning Staff indicate that this is unlikely to be a constraint for development in these areas.	see attached summary document and maps	No	
Duvall	City of Duvall - Public Works	Sewer	WWTP Capacity	Fourth treatment train capacity project	No	
Duvall	City of Duvall - Public Works	Water	None	Continued system upgrades/improvements	No	
Duvall	City of Duvall - Public Works	Stormwater	None	Continued system upgrades/improvements	No	

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Jurisdiction	Service Provider	Infrastructure Type	Service Deficiencies	Planned Investments	Infrastructure Gap Present?	Additional Notes
Enumclaw	The City of Enumclaw	Sewer	424 Sewer Basin	Lift station necessary	Yes	
Enumclaw	The City of Enumclaw	Sewer	Takoba	Lift station necessary	Yes	
Enumclaw	The City of Enumclaw	Sewer	Willogate	Lift station necessary	Yes	
Enumclaw	The City of Enumclaw	Sewer	436th	Lift station necessary	Yes	
Enumclaw	The City of Enumclaw	Sewer	440th	Lift station necessary	Yes	
Enumclaw	The City of Enumclaw	Sewer	448th	Lift station necessary	Yes	
Enumclaw	The City of Enumclaw	Sewer/Storm	452nd	Lift station necessary	Yes	
Enumclaw	The City of Enumclaw	Sewer	Newakum	Lift station necessary	Yes	
Enumclaw	The City of Enumclaw	Sewer	420th	Lift station necessary	Yes	
Enumclaw	The City of Enumclaw	Sewer	Chinook	Lift station necessary	Yes	
Enumclaw	The City of Enumclaw	Sewer	470th	Lift station necessary	Yes	
Enumclaw	The City of Enumclaw	Sewer	452nd	Lift station necessary	Yes	
Kenmore	Northshore Utility District (NUD)	Water	Kenmore & Kirkland's planned urban core densification may increase water usage/demand slightly beyond NUD's current capacity	M-17: 366 ZONE RESERVOIR AND BOOSTER STATION (10-YEAR) --The District plans to construct a new 4 MG reservoir and booster station at the site of Evergreen Hospital to serve planned urban development	No	
Kenmore	Northshore Utility District	Sewer/Wastewater	Wastewater Comprehensive Plan last published in 2006 and amended in 2018	No update planned	No	

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Jurisdiction	Service Provider	Infrastructure Type	Service Deficiencies	Planned Investments	Infrastructure Gap Present?	Additional Notes
Kenmore	Northshore Utility District	Sewer/Wastewater	As of 2006, around 600 units in NUD's service area were served by on-site septic systems.	NUD created a sewer extension program charged with enabling all developed properties with the capacity to connect to the sewer system. This program was concluded as of the most recent wastewater comprehensive plan amendment published in 2018.	No	
Kenmore	City of Kenmore: Public Works	Stormwater/Surfacewater	There exist environmental challenges in Kenmore's management of stormwater/surfacewater. These challenges do not impact systemwide development potential.		No	
Kent	City of Kent Water System	Water	529 and 590 Zone Storage	New 587 Zone Reservoir on the West Hill to serve 587, 575, and 529 Zones		
Kent	City of Kent Water System	Water	271 Alvord: Limited by 8-inch main downstream of PRV, which was installed in 2012. Fire flow in zone limited to approximately 1,300 gpm due to this piping.			
Kent	City of Kent Water System	Water	339 Seattle: Limited by 6-inch main downstream of PRV, which was installed in 2006. Fire flow in zone limited to approximately 750 gpm due to this piping.			

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Jurisdiction	Service Provider	Infrastructure Type	Service Deficiencies	Planned Investments	Infrastructure Gap Present?	Additional Notes
Kent	City of Kent Water System	Water	368 Weiland: Limited by 6-inch main upstream and downstream of PRV, which was installed in 1993. Fire flow in zone limited to approximately 680 gpm due to this piping.			
Kent	City of Kent Water System	Water	<p>485 Zone:</p> <p>South of SR 516: 6-inch main throughout neighborhood limiting fire flow to approximately 1,100 gpm.</p> <p>North of 234th Street: limited by 8-inch main on either side of the 234th and 96th PRV. Fire flow in vicinity limited to 1,000 to 1,400 gpm.</p>			
Kent	City of Kent Water System	Water	590 and 640 Zones: Fire flow limitations largely localized issues at dead-ends, or as a result of 6-inch main within neighborhoods.			
Kent	City of Kent Water System	Water	West Hill Zones: Fire flow limitations largely localized issues at dead-ends, or as a result of 6-inch main within neighborhoods.			

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Jurisdiction	Service Provider	Infrastructure Type	Service Deficiencies	Planned Investments	Infrastructure Gap Present?	Additional Notes
Kent	City of Kent Water System	Water	Approximately 23% of City's water main is cast iron pipe; some are more than 50 years old (beyond life expectancy).	Replace aging water mains with ductile iron, per City's water system standards.		
Kent	City of Kent Water System	Water	366 Stetson: Limited by 6-inch main downstream of PRV, which was installed in 2012. Fire flow in zone limited to approximately 750 gpm due to this piping.			
Medina	City of Bellevue	Water	None	None	No	
Medina	City of Bellevue	Sewer	None	None	No	
Medina	City of Medina	Stormwater	None	None	No	
Mercer Island	City of Mercer Island	Sewer	None	None	No	
Mercer Island	Seattle Public Utilities	Water	None	None	No	
Newcastle	Coal Creek Utility District	Sewer	None	n/a	No	
Newcastle	Coal Creek Utility District	Water	None	n/a	No	
Normandy Park	Southwest Suburban Sewer District	Sewer	Portion of unsewered households available	None	No	

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Jurisdiction	Service Provider	Infrastructure Type	Service Deficiencies	Planned Investments	Infrastructure Gap Present?	Additional Notes
Normandy Park	Midway Sewer District	Sewer	Portion of unsewered households available	None	No	
Normandy Park	Highline Water District	Water	None	None	No	
Normandy Park	King County Water District #49	Water	None	None	No	
Normandy	King County	Water	None	None	No	
Normandy Park	City of Normandy Park	Stormwater	None	None	No	
North Bend	City of North Bend	Water	No major deficiencies. Leak detection should be strengthened. More aggressive water meter replacement program is needed.	Expansion of water mitigation portfolio. Continued removal and replacement of AC water mains.	None	
North Bend	Sallal Water Association	Water	In 2018 Sallal reached capacity for water for their water right and has several infrastructure issues that manifested most recently in a month-long e-coli outbreak (Fall 2019).	Sallal and North Bend are currently formulating an agreement to sell each other water. Per 2015 City of North Bend Comprehensive Plan (Goal CF-5.3), the City's Plan is to eventually take over water service areas within the City's UGA.	Yes, but it will be alleviated. Sallal is at capacity, but this is not seen as a 20-year-long constraint considering Comp Plan Goal CF-5.3 and the City's drive to alleviate this issue.	

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Jurisdiction	Service Provider	Infrastructure Type	Service Deficiencies	Planned Investments	Infrastructure Gap Present?	Additional Notes
North Bend	City of North Bend	Sewer	The City's wastewater treatment plant is nearing capacity. The City is still accepting commercial applications through the 2019 WWTP Concurrency Ordinance, but is not currently accepting residential subdivision applications. Approximately 30% of the City uses septic drainfields and is not connected to the City sewer system.	Treatment Plant expansion - Phase I is under construction and will be completed by the end of 2020. Phase II expansion is planned to begin in early 2021 and will hopefully be complete in approximately 2022 or 2023. One Sewer ULID is being planned for the NW portion of City and is in the conceptual design phase, expanding use to a mixed use and recreational section of the City.	Yes, the treatment plant is almost to capacity. Some parts of the City are currently not served by City sewer.	
North Bend	City of North Bend	Stormwater	High groundwater table, ponding in flat areas, no large centralized retention facilities. Special Flood Hazard Area covers the western third of the City.	The City has aspirations for centralized regional stormwater retention facilities, specifically near our downtown commercial area.	Yes, due to the design of a bridge on SR202 the adjacent lands are artificially frequently flooded inhibiting development. The bridge is a choke point that exacerbates flooding.	

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Jurisdiction	Service Provider	Infrastructure Type	Service Deficiencies	Planned Investments	Infrastructure Gap Present?	Additional Notes
North Bend	City of North Bend	Transportation	None currently	Several Roundabouts are planned for construction. Road connections planned in CIP. City intends to follow their 6-year TIP which includes several improvements to existing roads.	None	
North Bend	WSDOT	Transportation	There is an LOS failure at SR202 and North Bend Way, but this does not limit development.	WSDOT's new policy is to end funding pavement overlays on state routes with posted speed limits less than 45mph due to funding constraints (SR202 in downtown). The City will need to find funding to maintain this road.	None	
Pacific	City of Pacific	Sewer		None	No	
Pacific	City of Pacific	Storm	On-site infiltration may be required, however there are not topography issues in the LI/Commercial areas with the exception of 2 parcels (see Table 2.3)	None	No	
Pacific	Lakehaven Utility District	Sewer, Water	Lakehaven will be the purveyor if future development occurs.	Possible future Potential Annexation Area (PAA)	Lots size minimums may be set to 15,000 sq ft for on-site infiltration requirements due to soil quality in this area.	

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Jurisdiction	Service Provider	Infrastructure Type	Service Deficiencies	Planned Investments	Infrastructure Gap Present?	Additional Notes
Redmond	City of Redmond	Stormwater		Overlake Facility #3 Village Stormwater Infiltration Vault NE 40th Street Stormwater Trunk Extension Class II Stream Improvements (High School Creek and Monticello Creek) City Center Groundwater Protection - 90th Street Pond Retrofit Smith Woods Stream and Pond Rehabilitation SE Redmond Pond C - Property Acquisition Evans Creek Relocation	No	Redmond Stormwater Facility Plan and Municipal Code
Redmond	Cascade Water Alliance	Water			No	Water service area identified in the Water System Plan
Redmond	City of Redmond Wells	Water		Pressure Reducing Valve & Meter Replacement Infiltration Retrofit Program	No	
Redmond	City of Redmond via Brightwater Wastewater treatment plant	Sewer	Proposed annexation areas lack sewer. Some areas still rely on septic systems. However, King County has sufficient capacity to meet Redmond's future demand (Comp Plan) No sewer hook up+ CARA area pose potential contamination issues.	Marymoor Village NE 70th Street Force Main Control System and Telemetry Upgrades	Yes	Service area shown in City's adopted General Sewer Plan.

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Jurisdiction	Service Provider	Infrastructure Type	Service Deficiencies	Planned Investments	Infrastructure Gap Present?	Additional Notes
Redmond	Puget Sound Energy	Electric & Natural Gas	none			Electrical Facilities Plan (PSE) to be consistent with Redmond Land Use goals
Redmond	King County	Solid Waste	none			Adequate landfill capacity until 2018 (Comp Plan)
Renton	City of Renton Water District	Water	None	None	No	
Renton	City of Renton Sewer Service District	Sewer	None	None	No	
Renton	Cedar River Water & Sewer District	Sewer, Water	None	None	No	
Renton	Coal Creek Utility District	Sewer, Water	None	None	No	
Renton	King County Water District #90	Water	None	None	No	
Renton	Soos Creek Water & Sewer District	Sewer, Water	None	None	No	

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Jurisdiction	Service Provider	Infrastructure Type	Service Deficiencies	Planned Investments	Infrastructure Gap Present?	Additional Notes
Sammamish	Sammamish Plateau Water District	Sewer	Sewer connection or crossing needed	Louis Thompson Rd (CL-3), CIP	Yes	
Sammamish	Sammamish Plateau Water District	Sewer	Sewer connection or crossing needed	Pine Lake Creek & 212th Ave Crossing, ULID or DEA	Yes	
Sammamish	Sammamish Plateau Water District	Sewer	Sewer connection or crossing needed	Ebright Creek Park Crossing, ULID or DEA	Yes	
Sammamish	Sammamish Plateau Water District	Sewer	Sewer connection or crossing needed	Upper Waverly Connecting Sewer (CL-2), ULID or DEA	Yes	
Sammamish	Sammamish Plateau Water District	Sewer	Sewer connection or crossing needed	SE 32nd to SE 30th Connection, ULID or DEA	Yes	
Sammamish	Sammamish Plateau Water District	Sewer	Sewer connection or crossing needed	Beaver Lake Park Crossing, ULID or CIP	Yes	
Sammamish	Sammamish Plateau Water District	Sewer	Sewer connection or crossing needed	SE 32nd near Beaver Lake Middle School, ULID or CIP	Yes	
Sammamish	Sammamish Plateau Water District	Sewer	Lift station needed	Broadmoore Estates Lift Station (LS-10), ULID or DEA	Yes	

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Jurisdiction	Service Provider	Infrastructure Type	Service Deficiencies	Planned Investments	Infrastructure Gap Present?	Additional Notes
Sammamish	Sammamish Plateau Water District	Sewer	Lift station needed	Treefarm East Lift Station (LS-11), ULID	Yes	
Sammamish	Sammamish Plateau Water District	Sewer	Lift station needed	Tiburon Lift Station (LS-7), CIP	Yes	
Sammamish	Sammamish Plateau Water District	Sewer	Lift station needed	223rd Lift Station (LS-13), DEA	Yes	
Sammamish	Sammamish Plateau Water District	Sewer	Lift station needed	Loree Estates Lift Station (LS-14), ULID	Yes	
Sammamish	Sammamish Plateau Water District	Sewer	Lift station needed	Water's Edge Lift Station (LS-3), CIP	Yes	
Sammamish	Sammamish Plateau Water District	Sewer	Regional Wastewater conveyance improvement needed	King County Diversion Project (not currently funded)	Yes	
Shoreline	Seattle City Light	Electric Power	2-Phase Power to 3-Phase Power	185th Street Corridor Project - Roadway redesign with multi-modal access, sidewalks, and undergrounding of utilities	No	
Snoqualmie	Snoqualmie Public Works	Transportation	2032 LOS E anticipated at SR 202 & Newton St. Intersection	Full Traffic signal when volumes meet signal warrant.	No	

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Jurisdiction	Service Provider	Infrastructure Type	Service Deficiencies	Planned Investments	Infrastructure Gap Present?	Additional Notes
Snoqualmie	Snoqualmie Public Works	Water	A study on securing water rights is planned. If new rights are secured, the main line from Canyon Springs will need to be secured & enhanced.	Source of Supply Investments - Improvements (Canyon Springs water line stabilization and spring boxes)	Yes	
Snoqualmie	Snoqualmie Public Works	Water	Adequate Water Main supply across the Snoqualmie River	SR 202 Bridge Water Main Replacement (part); and 705 to 599 Zone Conversion	Yes	
Snoqualmie	Snoqualmie Public Works	Sewer	Adequate Sewer Main supply across the Snoqualmie River	SR 202 Bridge Sewer Main Replacement (part).	Yes	
Snoqualmie	Snoqualmie Public Works	Sewer	TSS filtration (processing capacity)	Oxidation Ditch Improvements, Third Secondary Clarifier and Reclaimed Water Filters Replacement.	Yes	
Woodinville	Woodinville Water	Water	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 3 West areas.	Yes	Yes	
Woodinville	Woodinville Water	Sewer	General deficiencies for the sewer system.	No	Yes	
Woodinville	City of Woodinville	Stormwater	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	Yes	Yes	
Algona	N/A	Individual Parcels	No system gaps present, infrastructure constrained parcels identified		Yes	

Appendix H: Documentation of Market Factor and Infrastructure Assumptions - Infrastructure

Jurisdiction	Service Provider	Infrastructure Type	Service Deficiencies	Planned Investments	Infrastructure Gap Present?	Additional Notes
Auburn	N/A	Individual Parcels	No system gaps present, infrastructure constrained parcels identified		Yes	
Beaux Arts	N/A	N/A	No gaps identified	None	No	
Bothell	N/A	N/A	No gaps identified	None	No	
Carnation	N/A	Individual Parcels	No system gaps present, infrastructure constrained parcels identified		Yes	
Clyde Hill	N/A	N/A	No gaps identified	None	No	
Des Moines	N/A	N/A	No gaps identified	None	No	
Federal Way	N/A	N/A	No gaps identified	None	No	
Hunts Point	N/A	Individual Parcels	No system gaps present, infrastructure constrained parcels identified		Yes	
Issaquah	N/A	N/A	No gaps identified	None	No	
Kirkland	N/A	N/A	No gaps identified	None	No	
Lake Forest Park	N/A	Individual Parcels	No system gaps present, infrastructure constrained parcels identified		Yes	
Maple Valley	N/A	N/A	No gaps identified	None	No	
Milton	N/A	Individual Parcels	No system gaps present, infrastructure constrained parcels identified		Yes	
SeaTac	N/A	N/A	No gaps identified	None	No	
Skykomish	N/A	Individual Parcels	No system gaps present, infrastructure constrained parcels identified		Yes	
Tukwila	N/A	N/A	No gaps identified	None	No	
Urban Unincorporated King County	N/A	Individual Parcels	No major system gaps present, infrastructure constrained parcels identified, parcels on septic		Yes	

Appendix H: Documentation of Market Factor and Infrastructure Assumptions - Infrastructure

Jurisdiction	Service Provider	Infrastructure Type	Service Deficiencies	Planned Investments	Infrastructure Gap Present?	Additional Notes
Yarrow Point	N/A	Individual Parcels	No system gaps present, infrastructure constrained parcels identified		Yes	