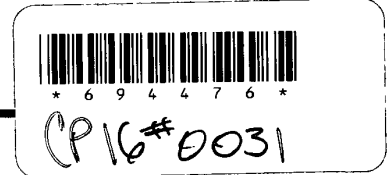


O'Donnell, Mary Beth



From: McCall, Marilee
Sent: Monday, February 03, 2014 4:07 PM
To: Orjiako, Oliver
Cc: Euler, Gordon; Anderson, Colete; Niten, Jeff; Albrecht, Gary; Kämp, Jacqueline; O'Donnell, Mary Beth; Lebowsky, Laurie; Alvarez, Jose
Subject: FW: City-County Coordination Meeting Agenda - Friday, February 14 10:00-11:30
Attachments: 14-0131_Clark County GMA Employment Projections 2035.pdf; 14-0214_City-County_AGENDA.pdf

Follow Up Flag: Follow up
Flag Status: Flagged

From: McCall, Marilee
Sent: Monday, February 03, 2014 4:00 PM
To: 'Amanda Smeller'; 'Dale Miller'; Eiken, Chad; 'Eric Eisemann (e.eisemann@e2landuse.com)'; 'Jeff Sarvis (jsarvis@ci.lacenter.wa.us)'; 'Lee Knottnerus'; 'Mitch Kneipp'; Niten, Jeff; James Weldon; 'Phil Bourquin'; 'Robert Maul' (robert.maul@cityofbg.org); Towne, Sandra; Snodgrass, Bryan
Subject: FW: City-County Coordination Meeting Agenda - Friday, February 14 10:00-11:30

Attached is the agenda for the upcoming meeting for the Planning Directors to be held at Washougal City Hall, 1701 "C" Street, Washougal, on Friday, February 14, at 10:00 a.m.

The Washington State Employment Security Department projection numbers are also attached in the first document. More information will be forwarded as it becomes available. If you have any questions, please feel free to call Oliver at 360.397.2280 ext. 4112.

Map and address to Washougal City Hall is below.

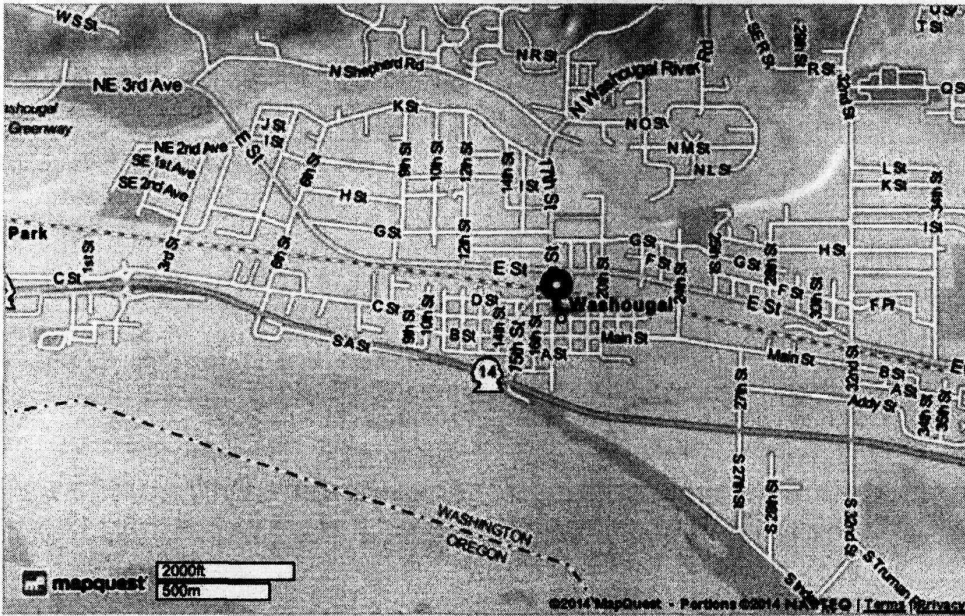
Thanks!



Map of:
1701 C St
 Washougal, WA 98671-2333

Notes

WASHOUGAL CITY HALL
 1701 "C" Street, Washougal WA 98671



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Community Planning AGENDA

Date: Friday, February 14, 2014

Time: 10:00 AM to 11:30 AM

Location: City of Washougal, City Hall
1701 C Street, Washougal, WA 98671

City-County Planning Directors Coordination Meeting

Outcomes:

- Collaboration for City-County population and employment allocation on the Comp Plan update.
- Agreement on methodology for allocation.
- Coordination on all BOCC work sessions on the Comp Plan update.

Agenda Item:	Introduced by:
Welcome & Introductions (5 minutes)	Oliver Orjiako
BOCC WS on Employment Forecast (5 min)	Oliver Orjiako
Population & Employment Allocation Discussion (30 minutes)	Oliver Orjiako & All
BOCC & PC WS schedule (20 minutes)	Oliver Orjiako & All
Initiative I-502 – Follow-up Update (15 minutes)	Gordy Euler
Roundtable (20 minutes)	ALL
Next Meeting Agenda and Location (5 minutes)	ALL

Next meeting: Time/location TBD.

January 31, 2014

To: Oliver Orjiako
Clark County Planning Department

From: Scott Bailey
Regional Economist
Washington Employment Security Department

Re: GMA Employment Projections

Thank you for requesting input on long-range employment projections for Clark County growth management. I have prepared scenarios for employment by industry for the year 2035 based on the population projection of 562,207. This memo is meant to guide readers through that scenario, and make explicit the assumptions I used.

Before starting, I want to make it clear that the projections below are in no way predictions or forecasts of the future. The question I'm answering in the projections is, "if Clark County grows such that its 2035 population is 562,207, what does that imply for employment?" While the county's development will take place within a larger economic context, local policies in place and yet to be adopted will have an impact as well.

The projections are based on the implicit assumptions that local governments will zone enough land and make capital investments adequate to support the projected population and jobs.

Finally, except for population, all projections will be shown rounded to the nearest 100.

Step 1. Population and Housing

The employment projections are based on a 2035 population projection of 562,207, the mid-range projection from the state Office of Financial Management, with estimates for age and sex by five-year cohorts. Using Metro's projection of 2.66 persons per household for Clark County, that works out to 211,400 households.

Step 2. Labor Force and Employed Residents

Based on the demographic projections, the working-age population—all those aged 16 and older—will be 429,500 in 2035. The total estimated labor force for the county was derived by applying labor force participation rates to each age and sex cohort and summing the result. The labor force participation rates were based on projections made by the U.S. Bureau of Labor Statistics. The overall labor force participation rate for the county is projected to be 60.4%, which reflects both the aging of the population and the subdued participation rates for younger workers coming out of the recent recession.

When this percentage is multiplied by the working-age population, the result is a projected labor force of 259,400. Assuming an unemployment rate of 5.5%, there would be 245,200 employed residents in the county in 2035.

Step 3. Gross Nonfarm Employment

How many jobs are associated with working residents? To get from employed residents to gross nonfarm employment, the following factors must be accounted for: farm employment, unpaid family workers, employees at private households (e.g. nannies, caretakers for the elderly), the self-employed, and multiple jobholders. Alternatively, one can simply make a projection based on the ratio of nonfarm jobs to employed residents. Using national projections showing a slight decline in the percentage of self-employed workers and an increase in the ratio of nonfarm jobs to employed residents, the gross number of jobs was estimated at 244,700.

A technical note: beginning in 2014, home care services funded through DSHS will be reclassified from NAICS 814 (private household employers) to NAICS 624 (social assistance). The former is not included in nonfarm employment, while the latter is included. Since these jobs have no impact on land use, projected nonfarm employment in this memo excludes them.

Step 4. Cross-County Commuting, Net Employment in the County, and the Jobs/Housing Ratio

The question for industrial and commercial land use planning becomes how many of these gross nonfarm jobs will be located in Clark County. Currently, the net number of cross-county commuters in Clark County is the equivalent of around 58,000 nonfarm jobs. The ratio of nonfarm jobs to housing units was 0.94 in 2012, compared with 1.19 for the four-county metro area. How these two figures will change in the future depends in large part upon land-use policy and infrastructure investments. Some possible scenarios:

Scenario 1: Constant proportion of net cross-county commuters. One possibility is that the ratio of net commuters to total jobs will remain constant. This would work out to a net of 76,200 cross-county commuters, putting county nonfarm employment at 167,100 (roughly 1,400 jobs would not be included as nonfarm employment). Job growth would average 0.8 percent annually for the 2015-2035 period, well below the long-term historical trend. The jobs/housing balance would fall to 0.79. Implicit in this scenario is that transportation infrastructure and land zoned for enterprise expand at an adequate pace to support both development in Clark County and commuting across the river.

Scenario 2: Constant jobs/housing ratio. Growth could happen in such a way that the jobs/housing ratio remained at 0.94. This translates into 198,700 nonfarm jobs in the county, and 44,300 net commuters. Annual job growth would average 1.7 percent. This scenario would likely require less capacity in terms of bridge crossings—a reduction in

net commuting doesn't necessarily mean a reduction in gross commuting—but more land made available for commercial and industrial development in the county.

Scenario 3: Clark County governments make a conscious effort to increase the jobs/housing ratio. The first two scenarios take somewhat of a passive approach to the jobs/housing ratio. This third scenario assumes that the County makes an explicit attempt to increase the jobs/housing ratio by zoning additional land for industrial and commercial uses. It may be feasible to increase the jobs/housing ratio to above 1.0, below the 1.32 projected for the four-county metropolitan area. An average growth rate of 2.2 percent would be required to reach a ratio of 1.04. Net commuting would decline to 24,900.

The outcome for each scenario is summarized in the table below, based on the current development density of 15.7 jobs per acre. Following your request, an estimate of 141,300 will be used for 2015 employment (a 5.4 percent increase over 2013).

SAMPLE TARGETS FOR JOB/HOUSING RATIO, WITH COMMERCIAL/INDUSTRIAL LAND USE IMPLICATIONS, 2015-2035				
Jobs/Housing Ratio	Total Nonfarm Jobs	Net Cross- County Commuters	Net New Jobs	Acreage Needed
0.84	177,500	67,200	36,200	2,300
0.94	198,700	46,000	57,400	3,700
1.04	219,800	24,900	78,500	5,000

Step 4. Employment by Industry

Industry employment projections were based on national and state projections and local history. As with any 20-year economic projections, these are highly speculative. Much will happen in the way of technological, social, and political change over the next 20 years that cannot be anticipated. I would welcome other opinions about different future trends for industries:

Some explicit assumptions made were that retail trade, some services, and much of government would be tied to population growth and would not be directly affected by adding commercial/industrial acreage. However, there might be secondary effects due to the retention of more of the workforce in the county. For example, in-county workers would have fewer chances to shop in Oregon, so it would be reasonable to assume that there would be some positive impact on retail trade.

Most of the job growth from more commercial/industrial acreage would come in construction, manufacturing, wholesale trade, distribution, information, financial services, and professional and business services.

POSSIBLE FUTURES: CLARK COUNTY NONFARM EMPLOYMENT					
	HISTORICAL	PROJECTED	2035 SCENARIOS		
	2013	2015	1	2	3
Total	134,100	141,300	167,100	198,700	219,800
Construction, Mining & Logging	9,400	10,800	9,200	11,200	12,600
Manufacturing	13,000	13,400	14,500	17,500	19,600
Wholesale Trade	5,700	5,900	7,000	9,000	10,000
Retail Trade	15,900	16,800	16,000	20,300	22,500
Transportation, Warehousing, Utilities	3,800	3,800	4,500	5,600	6,100
Information Services	2,700	3,400	4,000	4,700	5,200
Finance & Insurance	4,300	4,900	5,600	6,700	7,500
Real Estate, Rental & Leasing	2,300	2,300	2,800	3,500	4,000
Professional Services	7,100	7,300	10,800	13,100	15,000
Corporate Offices	2,100	2,100	3,000	3,600	4,000
Business Services	6,800	7,000	7,700	9,400	10,600
Private Education	1,400	1,400	1,600	1,900	2,000
Health Care & Social Assistance	18,100	18,800	27,100	35,000	40,900
Arts, Entertainment & Recreation	2,400	2,400	3,300	4,000	4,400
Accommodations & Food Services	10,700	11,300	12,700	15,200	16,700
Other Services	5,100	5,200	6,000	6,700	7,400
Government Administration	10,000	10,300	12,800	12,800	12,800
Public Education (K-20)	13,600	14,200	18,500	18,500	18,500

POSSIBLE FUTURES: CLARK COUNTY NONFARM EMPLOYMENT					
	HISTORICAL		2024 SCENARIOS		
	1990.	2004	1	2	3
Total	100.0%	100.0%	100.0%	100.0%	100.0%
Construction, Mining & Logging	7.0%	7.6%	5.5%	5.6%	5.7%
Manufacturing	9.7%	9.5%	8.7%	8.8%	8.9%
Wholesale Trade	4.3%	4.2%	4.2%	4.5%	4.5%
Retail Trade	11.9%	11.9%	9.6%	10.2%	10.2%
Transportation, Warehousing, Utilities	2.8%	2.7%	2.7%	2.8%	2.8%
Information Services	2.0%	2.4%	2.4%	2.4%	2.4%
Finance & Insurance	3.2%	3.5%	3.4%	3.4%	3.4%
Real Estate, Rental & Leasing	1.7%	1.6%	1.7%	1.8%	1.8%
Professional Services	5.3%	5.2%	6.5%	6.6%	6.8%
Corporate Offices	1.6%	1.5%	1.8%	1.8%	1.8%
Business Services	5.1%	5.0%	4.6%	4.7%	4.8%
Private Education	1.0%	1.0%	1.0%	1.0%	0.9%
Health Care & Social Assistance	13.5%	13.3%	16.2%	17.6%	18.6%
Arts, Entertainment & Recreation	1.8%	1.7%	2.0%	2.0%	2.0%
Accommodations & Food Services	8.0%	8.0%	7.6%	7.6%	7.6%
Other Services	3.8%	3.7%	3.6%	3.4%	3.4%
Government Administration	7.5%	7.3%	7.7%	6.4%	5.8%
Public Education (K-20)	10.1%	10.0%	11.1%	9.3%	8.4%

Let me know if you have any questions. I can be reached at (360) 735-4995 or scott.bailey@esd.wa.gov. Thanks.