From: Jeffrey Delapena
To: "Heidi Pozzo"
Cc: Oliver Orjiako; Jose Alvarez
Subject: RE: Comp Plan:Maps showing insufficient commercial land
Date: Monday, September 21, 2026 8:09:00 AM

Hello Heidi,

Thank you for providing these comments and attachments. Confirming these have all been received and will be added to the Comprehensive Plan Index of Record.

Best,

Jeff Delapena
Program Assistant
COMMUNITY PLANNING

564.397.4558

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-----Original Message-----
From: Heidi Pozzo <hcpheidi@yahoo.com>
Sent: Sunday, September 20, 2026 5:11 PM
To: Jeffrey Delapena <Jeffrey.Delapena@clark.wa.gov>
Cc: Oliver Orjiako <Oliver.Orjiako@clark.wa.gov>; Jose Alvarez <Jose.Alvarez@clark.wa.gov>
Subject: Comp Plan:Maps showing insufficient commercial land

EXTERNAL: This email originated from outside of Clark County. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Dear Jeff,

Please find attached a memo that describes the commercial land around 179th being insufficient to support the level of development and satisfy HB1181. I've uploaded the supporting maps to the link you provided me (Sept 20 at ~5:00), along with an economic analysis prepared by Hovee in 2018 that was part of the rationale for lifting the urban holding. If you could group all the maps together then the Hovee analysis after my memo, that would be appreciated.

Thank you,

Heidi

MEMORANDUM

DATE: September 20, 2026

FROM: Heidi Pozzo

RE: Clark County 2025–2045 Comprehensive Plan Update, Land Use Element — commercial land supply in the NE 179th Street corridor and the residential density assigned to it

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I. Summary

The NE 179th Street corridor has substantially less usable commercial land than the County's land supply figures show, and the residential density assigned to the corridor was premised on commercial development that is not occurring. The density should be reduced to what the commercial base and the transportation network can actually support.

Six composite maps accompany this memorandum. They record the commercial inventory parcel by parcel, and they show it being reduced four ways at once. Mixed use and office-residential land is developing as residential or nearly all residential, and the County has responded by proposing to halve the nonresidential minimum in the mixed use code while lowering the corresponding capacity assumption. Commercially designated land is being committed to public facilities: the County purchased the Neighborhood Commercial parcel at NW 11th Avenue and NW 164th Street, which will become part of the Fairgrounds park, and land held by the Ridgefield School District between I-5 and NE 29th Avenue is designated commercial and mixed use but will be schools. The future NE Delfel Road arterial will run through two General Commercial parcels, and because that alignment does not appear on the County's zoning mapping, the acreage it will consume is still counted as available. The General Commercial frontage that remains is being absorbed by self storage, vehicle and recreational vehicle storage, and single-tenant uses that generate almost no employment and few services for the households around them.

What survives is small and unevenly placed. Between NE Delfel Road and NE 15th Avenue, at the I-5 interchange, the Three Creeks South commercial center and the 179th Storage development will deliver some commercial; neither is built and what each will contain is not yet known. Beyond those, the inventory is fragmented into parcels averaging about two buildable acres. East of NE 15th Avenue, across two miles to NE 50th Avenue, there are three designated parcels: a mixed use parcel with a road designated to run through it and a stream between that road and the parcel line, the small parcel being developed as a dental office, and a mixed use parcel at NE 50th Avenue and 179th Street that faces rural land across the street and is unlikely to develop as mixed use.

The City of Vancouver has told the County the same thing at least four times in two years. In June 2026 the City wrote that large parts of the unincorporated Vancouver Urban Growth Area are proposed to be zoned only for housing with no close shopping or employment, forcing residents into drives of a mile or more for daily needs and leaving anyone who depends on transit or another non-driving mode unable to reach essential services — and that high density may not be

appropriate in those areas in the coming years. That describes this corridor. What is being built here is dense apartments and subdivisions with no transit, little employment and few stores. The deficiency is not one a few zoning changes cures; the area is not set up to support this form of development.

II. The Maps

The six composite maps are listed in Table 1. Each places the County's own zoning map over the County GIS parcel base, adds the adopted planned road network where one applies, and adds the development that is built, under construction, or designated. Boundaries follow parcel lines. Section VIII describes how the maps were prepared. They are not surveys, and parcel lines cannot be used to locate property boundaries on the ground.

Table 1. Maps submitted with this memorandum.

No.	Area covered	What it establishes
1	NE 179th Street at I-5, NE Delfel Road to NE 19th Avenue	General Commercial frontage occupied by storage, recreational vehicle and vehicle uses; the Three Creeks South commercial center; the future NE Delfel Road alignment crossing commercial parcels
2	NW 179th Street, NW 11th Avenue to NE Delfel Road and I-5	The General Commercial band absorbed by church, recreational vehicle park, public safety complex and storage uses
3	NE 179th Street, NE 10th Avenue to NE 29th Avenue	Office-residential land built out as apartments and single-family subdivisions; mixed use land with a road designated to run through it and a stream between that road and the parcel line; Ridgefield School District land designated commercial and mixed use
4	NE 179th Street north side, NE 29th Avenue to NE 50th Avenue	Continuous residential subdivision; the commercially designated corner parcel at NE 29th Avenue developed as a dental office
5	NE 179th Street south side, NE 29th Avenue to NE 50th Avenue	The mixed use parcel at NE 50th Avenue and 179th Street, facing rural land across the street
6	NW 11th Avenue and NW 164th Street, NW 164th Street to NW 154th Street	The Neighborhood Commercial parcel taken for the Fairgrounds park; mixed use blocks in the residential development pipeline; a mixed use parcel being rezoned to R-24

III. The Commercial Inventory

The economic feasibility study prepared for Clark County Public Works by E.D. Hovee & Company stated that the majority of commercial development in the Urban Holding area was expected to occur on mixed use zoned land. Mixed use accounted for roughly thirteen percent of

that land area, while land carrying a commercial plan designation accounted for about one percent. The commercial future of this corridor rested on the mixed use designation.

That premise has not held. At NW 11th Avenue and NW 164th Street, three mixed use blocks — Commons at Whipple Creek, Cedar Vista and Salmon Creek Apartments — are in the development pipeline as heavily residential projects, and the Ginn/Webber parcel immediately east is being rezoned from mixed use to R-24 multifamily residential. The mixed use parcel at NE 179th Street and NE 50th Avenue was the subject of a request to convert to residential, which the County did not grant. It remains mixed use on the map, but that does not make it commercial capacity: the other side of the street there is rural, so a mixed use development would draw from one side only, and it is unlikely to develop as mixed use. The mixed use land west of the dental office carries constraints of its own — a road is designated to run through it, and a stream lies between that designated road and the parcel line, leaving a limited developable remainder.

The mixed use inventory is therefore failing in both directions. Where conversion has been sought and granted, the land is lost to housing. Where conversion has been refused, the land keeps the designation on the map without the prospect of being built as mixed use. Either way the County's commercial capacity figure is overstated.

Office-residential land east of I-5 shows the same pattern at larger scale. Between NE 10th Avenue and NE 29th Avenue, the OR-24 and OR-36 land is built or designated as Three Creeks Apartments, Three Creeks East single-family, South Ridge Apartments West, South Ridge Central apartments and South Ridge East apartments. The only non-residential uses in that stretch are a school district site and a dental office. In 2016 the Columbia River Economic Development Council identified a thirty-five acre assemblage of office-residential land on this corridor as one of five countywide candidate employment sites, suitable for a corporate headquarters. That land is now housing, and nothing was designated to replace it.

The County has not disputed this pattern; it is amending the code and the capacity model to match it. Clark County Code 40.230.020(E) presently requires that, whether within a single building or across a development site, a minimum of twenty percent of a mixed use development be nonresidential and a minimum of twenty percent be residential. The twenty percent nonresidential floor is what makes mixed use land count as commercial capacity at all. This update proposes to lower that minimum to ten percent. The capacity assumption moves with it: an October 31, 2024 County staff memorandum in the land use narratives portion of the Planning Commission hearing materials proposed changing the assumed split of developed mixed use land from eighty-twenty to ninety-ten residential to employment, on the stated basis that recent development was running at roughly eighty percent residential. These are one change, not two. The County observed that mixed use was delivering about a fifth of its land as commercial, and responded by halving both the share the code requires and the share the model assumes. If the County reduces what mixed use is required and expected to deliver, the capacity that reduction writes off must be designated elsewhere. In this corridor it has not been.

Commercially designated land is also being committed to public facilities. At NW 11th Avenue and NW 164th Street the County purchased the Neighborhood Commercial parcel, which will become part of the Fairgrounds park; it was the neighborhood-serving commercial site for the residential blocks immediately south of it. The same applies to the land held by the Ridgefield School District between I-5 and NE 29th Avenue, which is designated commercial and mixed use and will be schools. The schools are a legitimate public need. None produces the retail, services or employment the commercial designation is counted on to provide, and the County has not replaced any of that designation elsewhere. This acreage should be treated as committed rather than available.

What remains of the General Commercial band is being absorbed by the lowest-employment uses the zoning allows. It holds 179th Storage, on a parcel on of NE Delfel Road; U-Haul Ridgefield, south of 179th Street east of I-5; Dicky's RV adjacent to it; and a recreational vehicle park at the west edge of the band near NE 2nd Avenue. A self-storage facility consumes its site for decades, produces a fraction of one job per acre, and provides no goods or services to surrounding households. Given the pattern already established here, additional self-storage development on the remaining General Commercial parcels is likely. The same absorption is appearing on employment land: industrial development is occurring on NE 10th Avenue south of 179th Street, and it too includes storage and vehicle parking.

The future NE Delfel Road right-of-way removes more. The 179th Street Circulation and Access Management Plan prepared by DKS Associates in July 2023 shows a proposed arterial running north from 179th Street as the future NE Delfel Road, and its alignment crosses two General Commercial parcels near the 179th Street intersection. The County's zoning mapping does not show this alignment, and neither does the land supply accounting built on it, so acreage that will become public right-of-way is still counted as developable commercial land. The effect is larger than the pavement: each parcel is left as two remnants too small for anything but small-format commercial, and the same plan shows shared-access and right-in, right-out treatments that will restrict how those remnants can be used.

Some commercial will be delivered, and it lies between NE Delfel Road and NE 15th Avenue. The Three Creeks South commercial center is designated and assembled for commercial development, and the 179th Storage development contains a commercial component. Neither is built, and what each will contain is not yet known. These are the corridor's realistic commercial prospects, more than two miles from the housing at its east end at 50th.

East of NE 15th Avenue there is nothing comparable. From NE 15th Avenue to NE 50th Avenue there are only three designated parcels: the mixed use parcel west of the dental office, constrained by the designated road and the stream beside it; the parcel where Maps 3 and 4 overlap, being developed as a dental office; and the mixed use parcel at NE 50th Avenue and 179th Street, which faces rural land across the street. Between them lies continuous residential subdivision. None of the three will produce a commercial center. The households in Ramble Creek, Mill Creek Terrace, Mountain View Ridge, Kozy Manor, Viers and the 174th Street subdivisions will have no store, no pharmacy and no other retail service within the corridor's commercial land along that stretch.

What is left is too fragmented to develop. The Hovee study identified 171 buildable acres of General Commercial, Community Commercial and mixed use land spread over 73 tax parcels, an average of 2.2 buildable acres each, with only three parcels carrying ten or more buildable acres. Business Park and Light Industrial land showed the same pattern at 238 buildable acres across 102 parcels. The study further found that eighty-five to ninety percent of future development in the study area would occur on properties containing some critical area on site. A parcel of that size does not support a grocery store, a pharmacy, a medical clinic, a multi-tenant office building or an employment center. It supports a storage unit, a fuel station or a single small pad, which is what the maps show being built. The study recommended incentives for parcel assembly as pivotal to achieving a meaningful employment base here. No such mechanism has been adopted, and the pressure has run the other way: assembly has occurred for residential projects, not commercial ones.

IV. Water and Sewer

The absence of water and sewer service across much of this corridor is addressed in my submission of February 16, 2026 and is not repeated at length here. The Hovee study treated water, sewer, transportation, stormwater and electrical infrastructure as the investments on which development of this area depended, and identified environmental and infrastructure costs as the added burden determining whether these sites would be locally and regionally competitive. Those prerequisites remain largely unfunded while residential buildout proceeds.

The consequence is visible in what has and has not been built. Industrial development has proceeded on NE 10th Avenue south of 179th Street. North of 179th Street nothing industrial has developed at all, and the absence of water, sewer and supporting infrastructure is the reason. That is the constraint the Hovee study identified, and it has not been resolved in the years since.

What service is arriving is arriving incrementally, extended by residential developers to reach their own projects. The Clark Regional Wastewater District materials of March 2026 show sewer reaching the corridor through project-by-project extensions with developer-built pump stations attached to individual subdivisions; the Mountain View Ridge and Viers pump stations appear that way on Maps 4 and 5. Extensions sized and routed to residential projects do not serve commercial parcels that are not adjacent to them, and a lateral sized for housing does not carry the fire flow and sewer capacity that retail, food service, medical and employment uses require. The cost of extending main line service falls hardest on the smallest parcels, which is to say on precisely the two-acre commercial remnants that remain.

V. What the City of Vancouver Has Told the County

The City of Vancouver has written to the County at least four times over two years on the absence of commercial and employment land near housing in the unincorporated Vancouver Urban Growth Area. Each letter is in the Comprehensive Plan Index of Record and each is signed by Councilmember Erik Paulsen. They are cited below by date.

The City's position is that the shortage is a compliance problem, not a preference. In its written testimony of November 6, 2024 it recommended that the County include new commercial and employment designations in the existing Vancouver Urban Growth Area near the residential areas that lack them, which the City stated is needed to comply with GMA mandates and the local Countywide Planning Policies. It described the Vancouver Urban Growth Area as unusually poorly integrated even for an unincorporated urban area, with much of its housing located miles from the nearest commercial services or employment, and reported that its own analysis found the shortage of employment land to be a major contributor to congestion on local and state roads because residents are forced to commute long distances, including into Oregon.

In its letter of June 18, 2026 the City addressed the form of development directly. It wrote that many parts of the Vancouver Urban Growth Area are proposed to be zoned only for single-family housing with no close shopping or employment, forcing residents into drives of a mile or more for daily needs and making it difficult for anyone who relies on transit or another non-driving mode to reach essential services, and that high density in these areas may not be appropriate in the coming years. Its objection was to the County's proposed new Policy 1.4.1, which the City read as calling for dense mixed use development in all corners of the Vancouver Urban Growth Area without distinguishing the parts that have no services to build around.

Writing on August 18, 2026 as the final adoption hearings opened, the City reported that large portions of the unincorporated Vancouver Urban Growth Area contain nothing but housing, that residents are forced to drive a mile or more to the nearest shopping or employment, and that this is inconsistent with the GMA climate requirement to reduce vehicle miles traveled and with longstanding Policy 1.4.1. It reported that although City staff had identified seventeen candidate sites in 2024, no zoning meaningfully incentivizing or requiring commercial or employment uses had been added in the parts of the Vancouver Urban Growth Area that need it, and that in most cases the proposed zoning does not even allow those uses.

VI. The Density Assigned to This Corridor

The corridor's future was described as a commercial and mixed use hub with supporting residential. The supporting residential has been delivered. The hub has not. What was designated commercial has been converted to housing, committed to a park and to school sites, absorbed by storage and vehicle parking, crossed by a future arterial, or reduced to fragments too small and too constrained to build on. What commercial is still expected lies between NE Delfel Road and NE 15th Avenue at the far west end, is not yet built, and is of unknown composition. Density premised on a commercial center that is not being built out as planned is density in the wrong place.

Comprehensive Plan Policy 1.4.1 directs that interrelated uses locate in close proximity to one another, and specifically that frequently used commercial activities and the residential areas they serve be allowed and encouraged to locate near each other, and that commercial, industrial and other employers and the residential areas they serve do the same. The County's proposed new Policy 1.4.1 goes further, committing the County to plan for connected and accessible communities

in the unincorporated Vancouver Urban Growth Area where a significant majority of daily needs can be met within a convenient and safe walk, ride, roll or transit ride.

Multifamily housing is the form of development for which that siting direction matters most. Apartments belong where residents can reach stores, services, jobs and transit without a car, and the County's own policy direction says so. In this corridor a household in one of the new apartment complexes cannot reach a grocery store, a pharmacy or an employer on foot, and through most of the corridor cannot reach one by transit either. The nearest commercial designation is a self-storage facility. Assigning multifamily density to land with no adjacent commercial and no transit service is not implementation of Policy 1.4.1; it is the outcome the policy exists to prevent.

HB 1181 makes this a compliance question rather than a preference. Clark County is one of the counties for which the greenhouse gas emissions reduction subelement is mandatory. Under the amended RCW 36.70A.070(1) the land use element must consider urban planning approaches that reduce per capita vehicle miles traveled without increasing emissions elsewhere in the state, and the plan must identify specific, measurable actions the County will take during the planning period. A corridor with housing and little commercial base does not reduce per capita vehicle miles traveled; it guarantees the opposite. Every grocery trip, errand and service appointment becomes a trip out of the corridor, and those travel patterns are set for the life of the buildings. Commerce guidance treats progress under the subelement as measured by whether a jurisdiction implements the measures it adopts, and a county that adopts vehicle miles traveled reduction language while converting the commercial land that would shorten those trips has not implemented anything.

Transportation concurrency in this corridor is a further and serious problem. I have commented extensively on it and submitted those comments to the Index of Record, and the detail is not repeated here.

VII. Conclusion

The commercial land supply figure the County is relying on for this corridor does not describe the corridor. It counts mixed use and office-residential acreage that is being permitted as housing, a Neighborhood Commercial parcel the County itself purchased for the Fairgrounds park, school district land that will be schools, right-of-way the County has already planned to take for NE Delfel Road, and General Commercial frontage committed to self storage and vehicle parking. What remains averages roughly two buildable acres per parcel, carries critical area on most sites, and lacks the water and sewer service that commercial intensity requires. The County is at the same time proposing to halve the nonresidential minimum in the mixed use code and the corresponding capacity assumption, without designating replacement commercial land anywhere in the corridor.

The residential density assigned to this corridor was premised on a commercial and mixed use center that is not being built. What is being built instead is dense apartments and subdivisions with no transit, little employment and few stores within reach, on a corridor whose transportation concurrency is already in question. The County should reduce that density to what the commercial base and the transportation network can support.

VIII. Preparation of the Maps

The maps are composites built on County data. Each begins with the Clark County GIS taxlot view as its parcel base, and everything above that layer is registered to it. The zoning layer is the County's own zoning map view of August 20, 2026, laid over the parcel base; districts retain the County's colors and hatching and nothing is reclassified, recolored or redrawn. The development layer records sites that are built, under construction, or designated/in the development process, transcribed from my annotated field maps and from the Clark Regional Wastewater District's Active and Potential Development Activities materials of March 2026. The planned road network is added only where a published alignment applies, and comes from Figures 6, 7 and 8 of the 179th Street Circulation and Access Management Plan.

IX. References

The documents relied on in this memorandum that were prepared or submitted by others are listed in Table 2. Documents submitted by the author are listed in Table 3. County code, Comprehensive Plan policies and the City of Vancouver correspondence discussed in Section V are already in the record and are cited in the body rather than relisted here.

Table 2. Documents prepared or submitted by others.

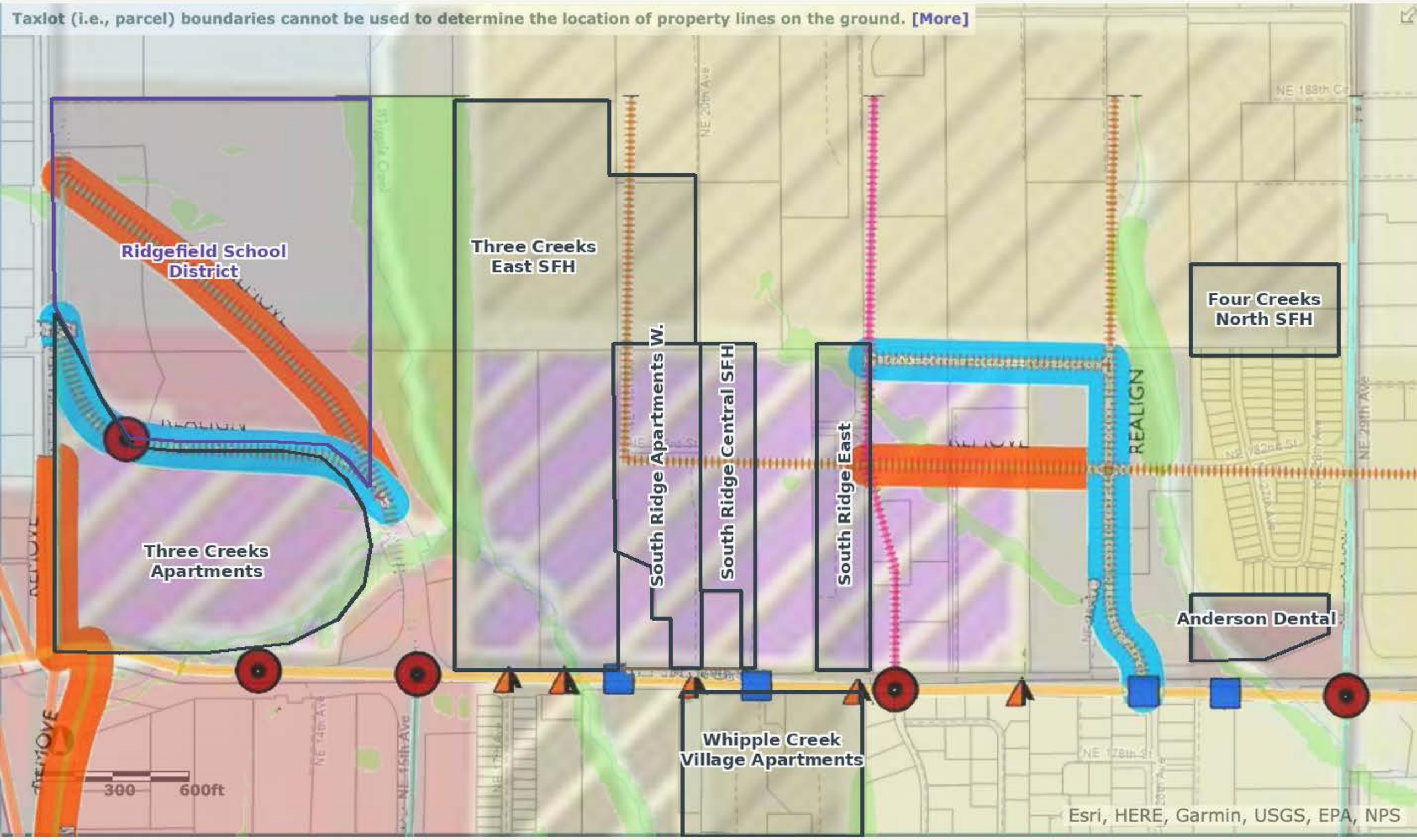
No.	Document
1	E.D. Hovee & Company, LLC, *Economic Feasibility Study for I-5/179th Interchange Area Development*, prepared for Clark County Public Works, 2018; data compiled mid-2017 to early 2018
2	DKS Associates, *179th Street Circulation and Access Management Plan*, July 2023, Figures 6, 7 and 8; source of the planned road network shown on the maps
3	Clark County staff memorandum, land use narratives portion of the Planning Commission hearing materials, October 31, 2024, proposing the change in the assumed mixed use development split from 80/20 to 90/10 residential to employment
4	Clark Regional Wastewater District, Active and Potential Development Activities, March 2026
5	Clark County zoning map view, and the Clark County GIS taxlot view, August 20, 2026

Table 3. Documents submitted by the author.

No.	Document	Date submitted to record
1	Submission addressing water and sewer service in the NE 179th Street corridor	February 16, 2026
2	The six composite maps listed in Table 1, accompanying this memorandum	September 20, 2026

NE 179TH STREET CORRIDOR — PARCELS, ZONING, PLANNED ROADS AND DEVELOPMENT

NE 10th Avenue to NE 29th Avenue, unincorporated Clark County, Washington | four sources composited on the county GIS parcel base



DEVELOPMENT (built, in process, or designated — as identified by the author)

- Ridgefield School District
- Three Creeks Apartments
- Three Creeks East SFH
- South Ridge Apartments West
- South Ridge Central SFH
- South Ridge East
- Whipple Creek Village Apartments
- Four Creeks North SFH
- Anderson Dental
- Separate parcel, not part of the named development

ZONING (Clark County zoning view, 8-20-26)

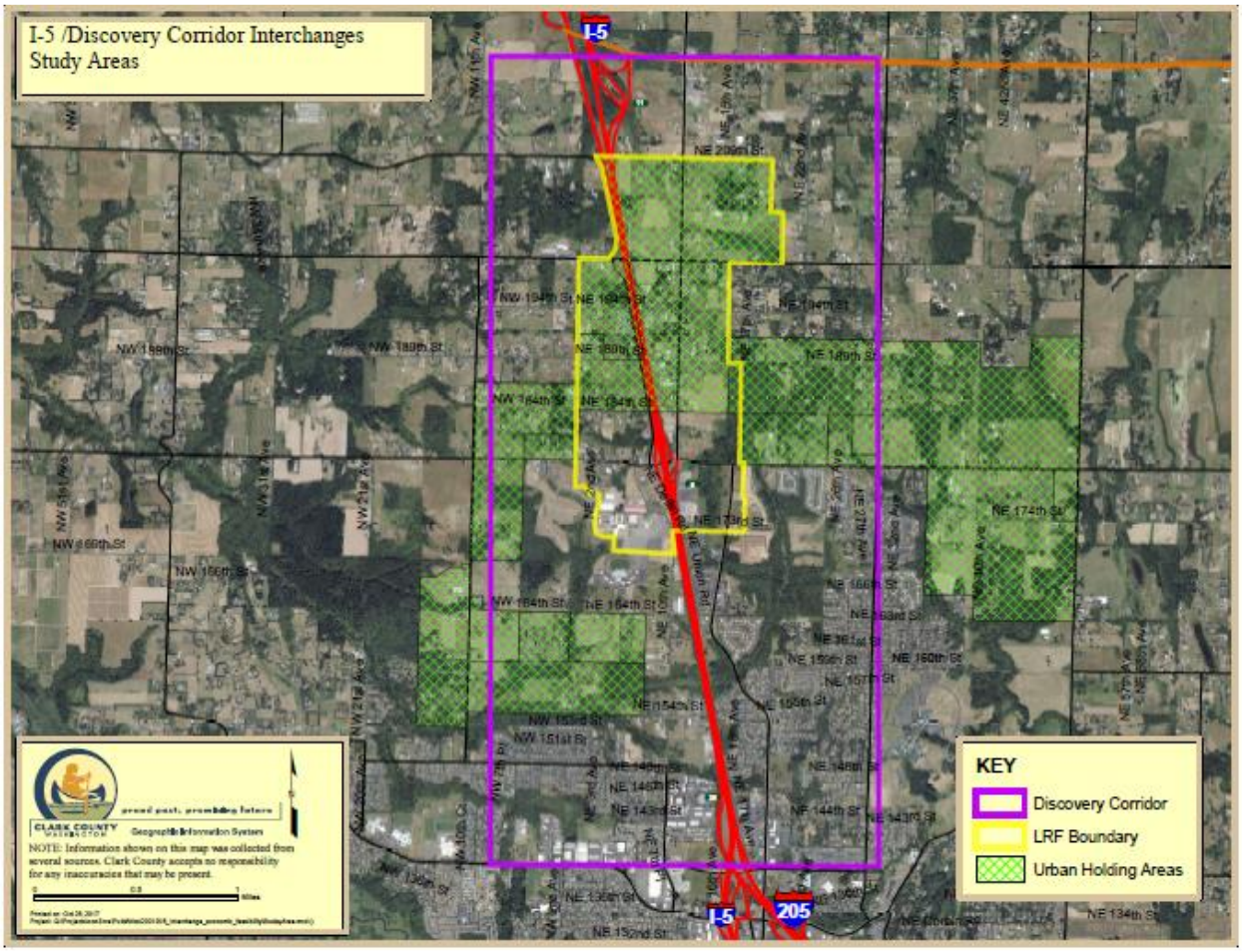
- **GC** General Commercial
- **OR-24** Office Residential
- **OR-36** Office Residential
- **R-24** Multifamily Residential
- **MX** Mixed Use
- **R1-10** Single-Family Residential
- **R1-6** Single-Family Residential
- **IL** Light Industrial

PLANNED ROAD NETWORK (179th Street Circulation and Access Management Plan, DKS, July 2023 — Figure 7)

- Remove existing alignment
- Realign
- Proposed arterial
- Roundabout
- Shared access, right-in / right-out
- Interim access, emergency use only
- Potential wetlands presence

Development boundaries are transcribed from the author's annotated field map, registered to this frame by matching the printed map furniture; they are approximate, not surveyed parcel lines. Figure 7 fitted by cross-correlation of shared linework; residual on independent check points about ±40 ft. Zoning fitted on NE 10th Ave, NE 25th Ave, NE 179th St and NE 188th St (under ±20 ft), then enlarged about 7.3x, so zone edges carry roughly ±30 ft of softness. Parcel lines are Clark County GIS and cannot be used to determine property lines on the ground. Not a survey.

CLARK COUNTY:
Economic Feasibility Study for I-5/179th Interchange Area Development



Prepared for:
Clark County Public Works

May 2018

E. D. Hovee & Company, LLC

Economic and Development Services

AT-A-GLANCE SUMMARY

As the last interchange on Interstate 5 to be upgraded in Clark County, 179th Street offers opportunity to serve as an economic catalyst for an employment-focused Discovery Corridor – extending across five interchanges from the I-5/I-205 junction north to the Clark County line. Funded by the Washington State Community Economic Revitalization Board (CERB), this feasibility study outlines a strategy offering realistic prospects for improved community economic vitality for above median wage jobs for the 179th interchange area and for the full Discovery Corridor. Key findings from this report follow.

The I-5/179th Interchange. The geography of the I-5/179th full study area comprises 5,300 acres extending on both sides of I-5 from 139th Street north to 219th Street. Of this area, 2,100 acres are currently covered by an Urban Holding (UH) designation, meaning that further development cannot proceed until 179th Street interchange and supporting infrastructure improvements are completed.

Based on the Clark County Vacant Buildable Lands Model (VBLM), 1,114 acres are identified as located within an urban growth area (UGA) and suitable for residential or employment development. The UH area has the bulk of the full study area's buildable land and housing potential; the rest of the study area is pivotal for creating a critical mass of family wage job opportunity for Clark County residents.

In addition to transportation infrastructure needs, 85-90% of parcels with buildable lands are affected – at least in part – by critical land constraints. A major share of new residential development will require intensified use of partially developed sites – also a factor with business development. Due to the fragmented nature of existing ownerships, considerable assembly of smaller parcels will be required to achieve significant employment potential on properties zoned for light industrial and business park use.

Economic & Fiscal Assessment. Based on current zoning and land suitable for development, at full build-out the full I-5/179th Study area offers opportunity for:

- **5,550 added jobs directly in the study area** – with a full economic multiplier impact including indirect and induced effects of 7,670 added jobs county-wide
- **5,650 new housing units** – including single-family, multi-family and mixed-use development
- **$2.9 billing in construction value** – yielding $239 million in one-time sales tax and real estate excise tax (REET) revenues to the State of Washington and local jurisdictions in Clark County
- **$34 million in on-going annual tax revenue** – from REET, property and sales tax sources

Market Analysis. Demographic, economic, and industrial site considerations are all well suited for the I-5/179th area to support the development of county-wide **industry clusters** for computers and electronics, clean tech, software, metals and machinery and life sciences – for a mix of local and outside investment, especially for firms requiring **immediate access** to I-5 corridor transport and labor force.

Market Strategy. Five **activity clusters** are identified as pivotal to creating anI-5/179th full-service jobs eco-system – for employment center, commercial/mixed use, entertainment/event, business/ commerce and surrounding residential uses. A 3-step **action agenda** includes recommendations to: 1) proceed with ready-to-build public-private partnership projects, 2) recruit private investment for the best available development and CERB-supported capital funding proposal; and 3) prepare a cooperative, multi-jurisdictional 20-year Discovery Corridor strategic plan.

CERB MINIMUM REQUIREMENTS

This I-5/179th interchange area feasibility study is aimed to outline a clear strategy offering realistic prospects for improved community economic vitality in unincorporated north Clark County. What follows is a summary statement of responses to the following **minimum requirements** that this planning study is to address with future CERB application for the Prospective Development Construction Program. For each CERB item specified, reference also is made to the portion of the report in which the topic is discussed in more detail.

a. A product market analysis linked to economic development.

Detailed components of a product market analysis are provided by the Section IV Market Analysis portion of this economic feasibility study report and Section V Market Strategy components of this analysis. More so than other developed or as-yet emerging areas of Clark County, the I-5/179th study area offers the unique opportunity to create what is described in this feasibility study report as a *full-service jobs eco-system.*

As described and mapped with the Section V Market Strategy, the five key activity clusters associated with this economic development concept include:

- **Employment center** – focused on light industrial and business park uses north of 179th Street as a primary though not the only source for generating family wage jobs
- **Commercial & mixed use** – the most immediate catalyst per current developer interest
- **Entertainment & events** – anchored by the Clark County fairgrounds and amphitheater
- **Business & commerce** – clustered along a newly improved NE 10th Avenue corridor south of 179th Street
- **Surrounding residential** – encompassing and supporting the I-5/179th economic clusters

b. A market strategy containing action elements linked to timelines.

As noted, Section V to this report covers the recommended market strategy – beginning with the overall concept, followed by discussion of activity clusters, economic feasibility, partnership opportunities and resulting action agenda. The action agenda involves three pivotal steps:

- **Proceeding with ready-to-build public-private partnership (P3) projects** – with lifting of Urban Holding as supported by committed infrastructure capacity (starting this year)
- **Recruiting for the best available economic development catalyst project** – with an above median wage (or family wage) private employment investment (next 2-3 years)
- **Preparing a cooperative, multi-jurisdictional, 20-year Discovery Corridor strategic plan** – encompassing all five I-5 interchange areas extending from the I-5/I-205 junction to the Clark County line (within the next 3-5 years)

c. Identification of targeted industries

As the state-designated Associate Development Organization (ADO) for Clark County, the Columbia River Economic Development Council (CREDC) has identified five targeted industry clusters for business development and recruitment:

- Computers and electronics
- Clean tech
- Software
- Metals and machinery
- Life sciences

As described by the Section IV Market Analysis, the study area presents definite opportunity to support and strengthen the life sciences hub that has emerged in the adjoining Salmon Creek/139th interchange area – anchored by major employers including WSU-Vancouver, Legacy Salmon Creek Medical Center, and Vancouver Clinic.

With unparalleled interstate freeway access for local and regional distribution, the Discovery Corridor is also well positioned to support Clark County and regionally based computer/electronic, clean-tech and software firms that depend on or otherwise benefit from the corridor's university research and life science attributes. And the corridor may be well situated for specialized metals and machinery manufacturing – both larger end users that want to own their own sites and for smaller niche players seeking an affordable, accessible industrial or business park location.

Added sources of family wage job growth may comprise a mix of professional and business, financial services, and the higher wage portions of the education/health services sector. Business activity should cover both tightly niched small as well as large employers. This mix can be accommodated with a combination of large sites for major corporate and branch facilities together with multi-tenant business parks for a diversity of small firms.

d. Identification of the group responsible for implementing the marketing strategy. Describe the group's capacity to complete the responsibility.

As described by the Section V Market Strategy, this feasibility study recommends that Clark County take the lead role for implementation and coordination of all three action agenda items. Clark County will pursue opportunities for cooperative marketing to secure an economic development catalyst project with the Columbia River Economic Development Council (CREDC) as the state-recognized Associate Development Organization for Clark County.

Clark County can also pursue creation of a working partnership with affected jurisdictions – including affected cities, port districts, tribal interests, and other public service providers in preparing and then implementing a 20-year Discovery Corridor strategic plan.

e. The site's appropriateness by addressing, at minimum, appropriate zoning, affect to the state or local transportation system, environmental restrictions, cultural resource review, and the site's overall adequacy to support the anticipated development upon project completion.

The capacity of the I-5/179th interchange for both employment and residential development is addressed by the Section II I-5/179th Interchange Area discussion which profiles the Urban Holding, local revitalization funding (LRF) and Discovery Corridor geographies of the full study area. This analysis relies on the Clark County Vacant Buildable Lands Model (VBLM) which quantifies capacity for added employment and residential development as consistent with current urban growth area (UGA) boundaries, comprehensive plan and zoning considerations and environmental restrictions as quantified with critical land exclusions.

The Urban Holding (UH) area in the immediate vicinity of the interchange is of particular importance – as development is conditioned on securing transportation infrastructure adequate to serve planned development. The Urban Holding overlay zone accounts for 2,100 acres of the total 5,300 full study area. Lands subject to Urban Holding constitute the bulk of the full study area's housing potential; the rest of the study area is more pivotal for creation of employment offering above median wage job opportunities.

f. A location analysis of other adequately served vacant industrial land.

The significance of the I-5/179th interchange area in relation to the full I-5/Discovery Corridor and the rest of Clark County is addressed by the industrial lands discussion with the Section IV Market Analysis. Of 56 potential employment sites (of 20+ acres) in Clark County, 17 sites are in the Discovery Corridor including five sites situated in or immediately adjacent to the I-5/179th study area.

The Discovery Corridor sites are advantageous for firms that value convenient access to I-5, notably for convenient freight service to the Puget Sound region. Of the Discovery Corridor sites, those in the I-5/179th study area offer the added advantages of central proximity to county-wide and regional workforce in what is planned as a *full-service jobs eco-system* with ready access to commercial services, mixed use and residential development.

g. Total funding for the public facilities improvements is secured or will be secured within a given time frame.

As described by the Introduction (Section I) to this economic feasibility study, the anticipated cost of improving the I-5/179th interchange is estimated at $35 million. Upgrading county arterials could cost an added $29 million. While the 2015 Legislature provided $50 million for the project, currently programmed state funds will not be available until 2023-25. Due to the critical nature of the project for the region's economic future, the 2018 Legislature approved $500,000 to begin project scoping and design work. The County is also interested in securing separate funds to augment or state transportation funding, especially for projects that serve a catalyst role in creating family wage job opportunities.

h. An analysis of how the project will assist local economic diversification efforts.

This analysis is provided by the Section V Market Strategy – beginning with a 10-point concept for this I-5/179th interchange set in the context of the greater five interchange Discovery Corridor as a major source of future Clark County family wage employment growth. For the I-5/179th study area, the concept includes identification of five key activity clusters as described by item (a) above. This analysis further addresses economic feasibility, partnership opportunities and a 5-year action agenda.

i. Indicate the specific issues that will be addressed.

The two issues most pivotal to sustained economic competitiveness consistent with the Section V Market Strategy and with any future proposed CERB capital projects are:

- Funding of required transportation and related infrastructure investments, first, to support lifting of the Urban Holding designation in the immediate vicinity of the interchange and, second, to support employment center development for above median wage jobs both south and north of the interchange area.
- The need for aggressive business development marketing to secure a lead or anchor family wage employer investment at the I-5/179th interchange and, more broadly, to pursue preparation of a cooperative 20-year strategic plan encompassing all five north county I-5 interchanges of the Clark County Discovery Corridor.

j. List one or more economic outcomes that you expect from the proposed CERB project.

Economic outcomes anticipated **with build-out** of the I-5/179th interchange study area are detailed by the Section III Economic & Fiscal Assessment portion of this report – including:

- **5,550 direct jobs** – covering industrial, commercial, and entertainment sectors important to Clark County's economic vitality
- **5,650 housing units** – as a mix of single attached/detached and multi-family workforce housing in support of the Discovery Corridor employment center.
- **$239 million in construction related and $34 million per year in on-going tax revenues** – to benefited state and local jurisdictions.
- **Achieving an above median wage** -- in excess of the approximately $20 per hour current county-wide median viewed as a minimum threshold for CERB infrastructure funding.

The #1 objective for any proposed CERB capital grant/loan request will be achieving a wage profile for benefited employer(s) in excess of the Clark County median wage. This is consistent with the adopted Clark County policy to prioritize assistance to employers who pay above a family wage. Family wage employment has been defined by Clark County as an above average wage for Clark County – similar to though not quiet the same as the median

wage determination by CERB. ***For purposes of this economic feasibility report, the terms "above median wage" and "family wage" are used interchangeably.***

For the already approved LRF, sales and property tax revenue generation for this portion of the I-5/179th study area will also be of considerable importance.

k. Describe the specific, quantifiable measures of the outcome(s) that will indicate success. Describe in measurable terms what you expect to be able to show as progress toward the outcome for each year before the whole outcome has been achieved.

Responses to items (k) – (m) are as outlined by the Section V Market Strategy with discussion of economic outcomes of this economic feasibility report. Output metrics are to be provided consistent with the response to item (i) above.

Key measures are jobs resulting from new development, residential housing units, tax revenues and wage levels. These metrics are proposed to be set in place and measured for the full study area. If CERB or related state economic development funding is provided for one or more specific projects, the same or similar metrics are expected to apply to the benefit area defined for each individual project.

l. Describe what data you will collect to determine whether the outcome is being achieved.

Regularly updated datasets that should be available consistent with the study area boundaries of the I-5/179th interchange area include:

- Square footage of new building space developed – for employment, residential and other uses
- Study area employment and wages
- Assessed valuation – by use type
- Property tax revenues
- Sales tax revenues (for properties within the LRF)

In the event that CERB funding is secured for a specific project area, Clark County could establish protocols for compilation of similar information for the specific development(s) benefited. This may involve agreements with the affected properties to provide outcome metrics – including payroll information in a manner as may be mutually determined.

m. Describe the data collection procedure including when data will be collected, from whom and by whom.

In the event of CERB capital funding and as outlined by Section V Market Strategy discussion of economic outcomes, Clark County should also be prepared to establish protocols that

include designation of a County department with the overall responsibility for data collection and management together with interagency agreements involving Clark County and the State of Washington for data sets that are within their respective purviews.

Data compilation is proposed to occur consistent with agency reporting cycles on an annual basis. The term of the data collection process is proposed to be for a period of not to exceed 10 years or as otherwise may be mutually agreed with the State of Washington / CERB program.

Anticipated data collection responsibilities are outlined as follows:

- **Clark County Auditor or Treasurer's Office** – for sales tax revenues (as currently maintained for the LRF)
- **Clark County Assessor/GIS** – building square footage, valuation of new construction and property taxes – by employment, residential and other use.
- **State of Washington Employment Security Department (ESD)** – average and median wage for all work district employment (subject to confidentiality requirements)
- **U. S. Census On-The-Map –** for employment and payroll estimates, if not available from other sources.

ESD data is proposed to be provided in the form of median hourly pay (not currently available except on a county-level for all job sectors combined but not for specific NAICS industrial sectors) as well as for average annual wages (which is currently a part of the normal ESD payroll reporting format).

n. The estimated median hourly wage of the jobs created when development occurs.

A pivotal objective of this CERB infrastructure investment is to leverage economic development that will result in wages exceeding the Clark County median. Ideally, tracking of outcomes is proposed to be through an interagency agreement whereby WA-ESD would provide this data in a form as mutually agreed between the County, ESD and CERB.

For any projects funded with CERB resources, it is understood that the median wage of those employed in the portion of the I-5/179th study area most directly benefitted will exceed the current Clark County median hourly wage (shown by CERB data as $19.99 per hour).

o. If the project is determined to be feasible, the following information must be provided within the final report:

This feasibility study indicates that build-out of the 1-5/179th study area as a full-service jobs eco-system should be feasible – contingent on funding for transportation and related development infrastructure. In the event that CERB capital funding is secured, information

for items (1)-(9) below will be provided for the portion of the study area most directly benefited.

What follows are preliminary estimates associated with build-out of the full study area.

1. **Total estimated jobs created (in FTEs).** Approximately 5,550 direct jobs within the study area, equating to 7,670 jobs county-wide including economic multiplier effects.
2. **Describe benefits offered to employees.** Information is not available and is not anticipated to be collected for new businesses in the area – except for firms that may be directly benefited by CERB capital funding. Clark County has included explicit calculation of benefits as a 25% add-on to the wage portion of employment compensation – with substitutability of above threshold wages for benefits as a possibility depending on individual firm practices and procedures.
3. **Describe the median hourly wage of the new jobs in relation to the median hourly county wage.** The feasibility study targets a mix of business types which combined is targeted to pay above the median wage for Clark County. Early non-CERB funded employment development may include a significant component of retail employment that is important as an early development catalyst but likely will not pay above the Clark County median wage. As companies and developers are attracted, employment center build-out will be aimed to achieve a higher wage profile – with the objective of exceeding the county-wide median wage for any CRB funded project and for the full study area at build-out.
4. **The county three-year unemployment rate in relation to the state rate.** Over the last three years (2015-17) for which annual average unemployment rates are now available, Clark County's unemployment has dropped from 6.5% to 5.1% – averaging 6.0% for the full three-year period. For Washington state, comparable rates have declined from 5.7% to 4.8% over the same time period – averaging 5.3% over all three years.
   While trending downward, Clark County's unemployment has averaged 13% above the statewide rate over the last three years. Additional unemployment rate information for Clark County and the entire state is provided by Appendix C to this report.
5. **County population change in the last five years.** As of 2017, OFM estimates that Clark County has 471,000 residents. From 2012-17, countywide population has increased by 39,750 residents, a gain of 9.2% in the last five years – equating to a growth rate averaging 1.8% per year. (See detailed chart with Appendix C to this report).
6. **The estimated jobs created represent what percentage of the county's labor force.** As of 2017, U.S. Bureau of Labor Statistics (BLS) data indicates that Clark County has a resident labor force estimated at 227,400 persons. The 5,550 jobs created directly within the I-5/179th study area at build-out represents 2.4% of the current countywide labor force. With economic multiplier effects included, the county-wide gain of 7,670 jobs would account for 3.4% of the county-wide labor force. These jobs represent opportunity to reduce current commuting for the one-third share of Clark County workers who currently travel to jobs outside the County – primarily to Oregon.

7. **The estimated jobs created represent what percentage of the county's unemployed workers.** For 2017, BLS data indicates that there were an estimated 11,600 unemployed resident workers in Clark County. The 5,550 direct job potential represents 48% of the number of unemployed workers in Clark County. With economic multiplier impacts included, the 7,670 jobs added directly and indirectly would represent about 66% of the currently unemployment resident workforce.
8. **Estimated new annual state and local revenue generated by the private business.** State and local sales tax on new construction together with Real Estate Excise Tax (REET) from sales of completed development is estimated at $239 million, received incrementally over a multi-year period to build-out of the I-5/179th interchange area. At build-out, the study area is expected to generate $34 million per year in added state and local property, REET and sales tax revenues. *Note:* All revenues are estimated in 2017 dollars and tax rates.
9. **Estimated private investment generated by project.** The added value of development realized to area build-out is conservatively estimated at $2.9 billion million by build-out (in 2017 dollars), consistent with current Clark County fair market value assessments. Total private investment can be expected to exceed this amount by another 25-35% due to funding of project indirect or soft costs plus furnishings and equipment.

The remainder of this economic feasibility report provides detailed analysis and documentation for the summary statements related to CERB minimum requirements as outlined above. Topics covered by the full report include a profile of the I-5/179th interchange area, economic and fiscal assessment, market analysis, and market strategy together with discussion of market and financial feasibility, marketing and economic outcomes.

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I. INTRODUCTION

This I-5/179th interchange area economic feasibility study is aimed to outline a clear strategy offering realistic prospects for improved community economic vitality while also addressing funding requirements of the Washington State Community Economic Revitalization Board (CERB). This introduction statement begins by describing the project purpose and background, followed by role of the CERB feasibility study, and an outline of the report's organization.[1]

PROJECT PURPOSE & BACKGROUND

In addition to briefly describing the project's purpose and background, key elements of this discussion cover project cost and funding, related projects, economic catalyst role of planned improvements, and pivotal role of the 179th Street interchange for the I-5/Discovery Corridor.

Project Purpose

Improve safety, enhance mobility and support job creation at the south end of Clark County's *Discovery Corridor,* an area along I-5 that has been identified for intensive job creation.

Background

The current I-5/NE 179th interchange was built in the 1960s, when north Clark County and the fairgrounds areas were still relatively rural. Vertical clearance under the freeway bridges no longer meets current standards, nor do the bridges comply with modern earthquake standards.

A *pinch point* under the freeway creates a major bottleneck for east-west traffic flow on NE 179th Street. There is little remaining traffic capacity in the corridor. Added job-creating projects are limited or thwarted because of inadequate I-5 and supporting local infrastructure.

Project Cost & Funding

As of 2017, improving the interchange has been estimated to cost $35 million. Upgrading county arterials near the interchange could cost an added $29 million. As part of a $16.1 billion statewide transportation package, the 2015 Legislature provided $50 million for the project but with state funds not available until 2023-25.

Due to the critical nature of the project for the region's economic future, Clark County requested the Legislature to accelerate construction and provide early state funds for design, engineering and permitting work. The 2018 Legislature approved $500,000 for project scoping and design work in conjunction with the $50 million Connecting Washington project.

Related Transportation Projects

Within the project study area, Clark County is currently proceeding with a separate project to extend, widen and improve NE 10th Avenue along the west side of I-5, including construction of a bridge over Whipple Creek. Construction began in 2017 at an expected cost of $22 million.

The NE 10th Avenue project will improve traffic circulation by closing a gap in the transportation grid, enhance public safety with an alternate route for first responders, increase access to the Event Center at the Clark County Fairgrounds, Sunlight Supply Amphitheater, and other recreational facilities, and support land uses as envisioned in the County's Comprehensive Plan.

Economic Development Catalyst

Consistent with the project purpose, I-5/179th interchange improvements are intended to support job creation in the southern half of Clark County's Discovery Corridor. Extending north from 134th street to the Clark County line, the Discovery Corridor is planned to serve as a major source of employment growth for southwest Washington for years to come.

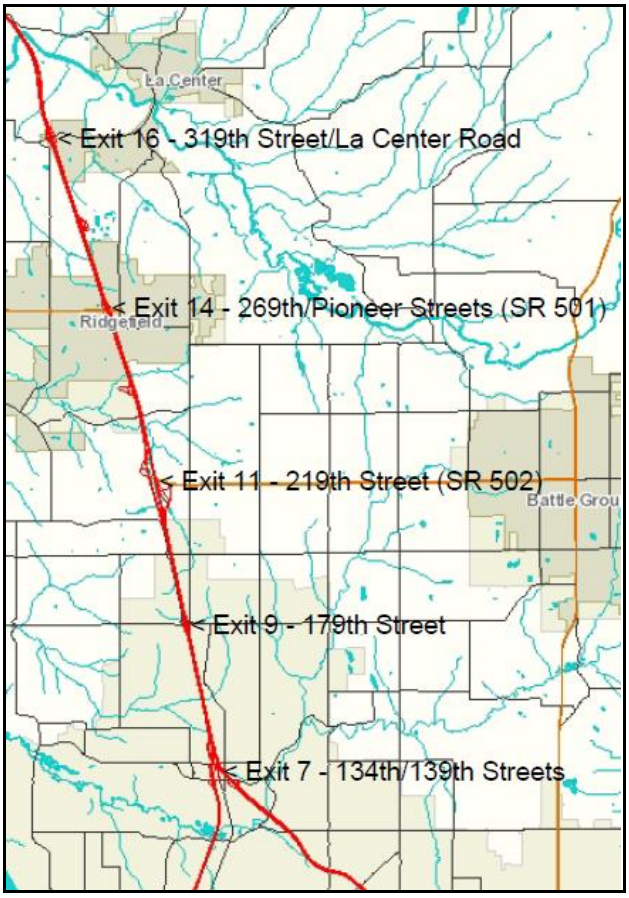
As detailed by Appendix B to this report, an earlier August 2015 analysis conducted for area property owners and developers first forecast an opportunity for significant job and tax revenue potential with development near the I-5 / NE 179th interchange. Clark County has signed a development agreement, pivotal for traffic improvements for the planned Three Creeks retail and mixed use center, as well as benefitting other planned area development.

Pivotal Role of 179th Interchange

As shown by the map to the right, the Discovery Corridor is served by five major sets of I-5 freeway interchanges:

- **134th / 139th interchange area** – also serving as the confluence of the I-5 and I-205 freeways – with 139th recently added as a reliever to overcrowding of the in-place 134th Street interchange.
- **179th Street interchange** – serving the Clark County fairgrounds and largely undeveloped area east and west of I-5 (a focus of this analysis).
- **219th Street Battle Ground (SR 502) interchange** – completed in 2016 to provide a direct connection from I-5 via SR 502 to Battle Ground.
- **269th Street Ridgefield (SR 501) interchange** – serving the I-5 Junction employment center and population growth of Ridgefield as one of the fastest growing communities in Washington state.

I-5 / Discovery Corridor Interchanges



Source: Clark GIS and E. D. Hovee.

- **319th Street / La Center Road interchange** – serving the town of La Center and the ilani tribal casino opened in 2017.

179th Street is the oldest of the I-5 / Discovery Corridor interchanges – with no substantial improvements made since its initial construction in the 1960s. In addition to providing for improved safety, mobility and economic expansion, the 179th interchange project will provide an opportunity to re-create the successful state-county partnership experienced with the $133 million Salmon Creek interchange (134th/139th). The result will be to cooperatively build infrastructure essential to regional competitive advantage, job creation and a robust economy – benefiting the Discovery Corridor and Clark County.

ROLE OF CERB ECONOMIC FEASIBILITY STUDY

CERB funding of this feasibility study represents an important first step in the path to local and county-wide economic recovery. As Washington's strategic economic development resource, CERB is focused on creating family wage, private sector jobs in partnership with local governments by financing infrastructure needed for industrial and office-related employment.

This economic feasibility study is intended to address topics including market analysis and marketing strategy, zoning and land use analysis, identify measurable economic outcomes and data collection processes along with projected employment figures. As specific eligible project activities are identified, this study may also serve as documentation for a Prospective Development Construction Program Application that could be submitted by Clark County for CERB capital funding consideration.

REPORT ORGANIZATION

The remainder of this economic feasibility study is organized to cover the following topics:

- **The I-5/179th interchange area** – describing area planning and zoning followed by a review of build-out potentials for Urban Holding and full study areas, respectively.
- **Economic & Fiscal Assessment** – providing quantitative estimates of direct and economic multiplier employment, payroll and revenue effects together with one-time construction and annualized tax revenue effects to benefited state and local jurisdictions (for both the Urban Holding and full study areas).
- **Market Analysis** – as a review of existing county-wide demographics and economics together with discussion of committed area development, industrial lands and opportunity for this I-5/179th area to be developed as a full-service jobs eco-system.
- **Market Strategy –** beginning with description of a development concept centered around five inter-connected activity clusters, followed by summary discussion of economic feasibility, partnership opportunities, marketing, economic outcomes and a recommended action strategy.

II. THE I-5/179TH INTERCHANGE AREA

Feasibility study discussion begins with an overview of the I-5/179th interchange area – including definition of study areas, comprehensive plan and zoning considerations. This is followed by a review of existing conditions affecting Urban Holding areas and what is described as a full study area – also including Discovery Corridor and Local Revitalization Financing (LRF) geographies.

INTERCHANGE STUDY AREAS

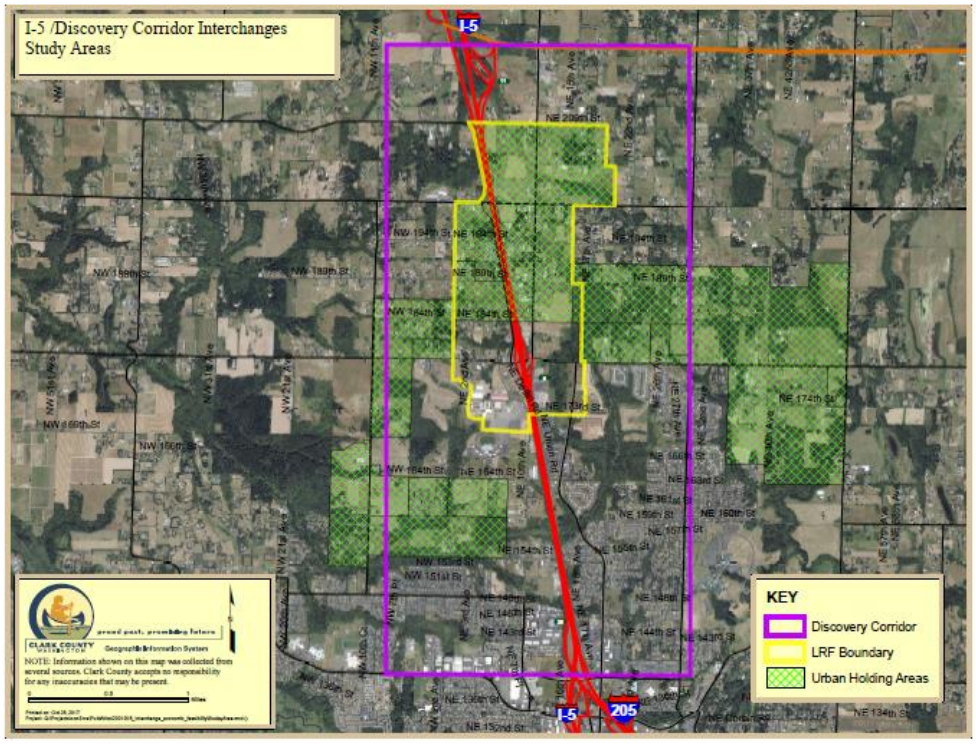
Economic effects of planned improvements are considered at two levels of geographic scale:

- **Urban Holding (UH) Areas** – for properties most directly impacted and currently subject to an Urban Holding designation, meaning that further urban development cannot proceed until interchange and supporting infrastructure improvements are completed.
- **Full I-5/179th Study Area** – includes but extends beyond the UH area to cover Discovery Corridor and LRF properties also benefitted by planned interchange improvements.

The inter-relationship of these areas is depicted by the map below. The full study area represents the *outermost boundary* of the UH, Discovery Corridor and LRF geographies (as further described in this section).

An approximate 2,100-acre portion of the full tudy area is subject to a Comprehensive Plan Urban Holding (UH) overlay. UH Properties are shown on the map by the **green cross-hatch area** – extending in a horseshoe shaped pattern around the I-5/179th interchange.

I-5/179th Interchange Full Study Area



Source: Clark GIS and E. D. Hovee. The Discovery Corridor area shown is for the portion of the corridor south of 219th Street.

As described by the updated 2016 Comprehensive Plan: "The Urban Holding Overlay protects areas from premature land division and development that would preclude efficient transition to urban development or large-scale industrial development."

Other properties generally situated in closest proximity both south and north of the interchange are part of the larger full study area. This larger study area also includes some rural property outside of the existing urban growth area (UGA).

For properties not subject to the Urban Holding (UH) designation, development can proceed prior to completion of planned interchange improvements. This includes commercial and public facility property in the immediate interchange area – as well as some industrial land along NE 10th Avenue plus land extending north to the 219th interchange area.

While not directly dependent on an upgraded interchange as a condition of development, non-UH properties of the LRF and Discovery Corridor will indirectly benefit. Improved local transportation and access to the I-5 corridor will serve as an additional impetus to development for commuters to and from area worksites and residences, freight mobility for local companies shipping via truck on I-5, and patronage of area shopping and entertainment/event facilities.

Zoning Designations

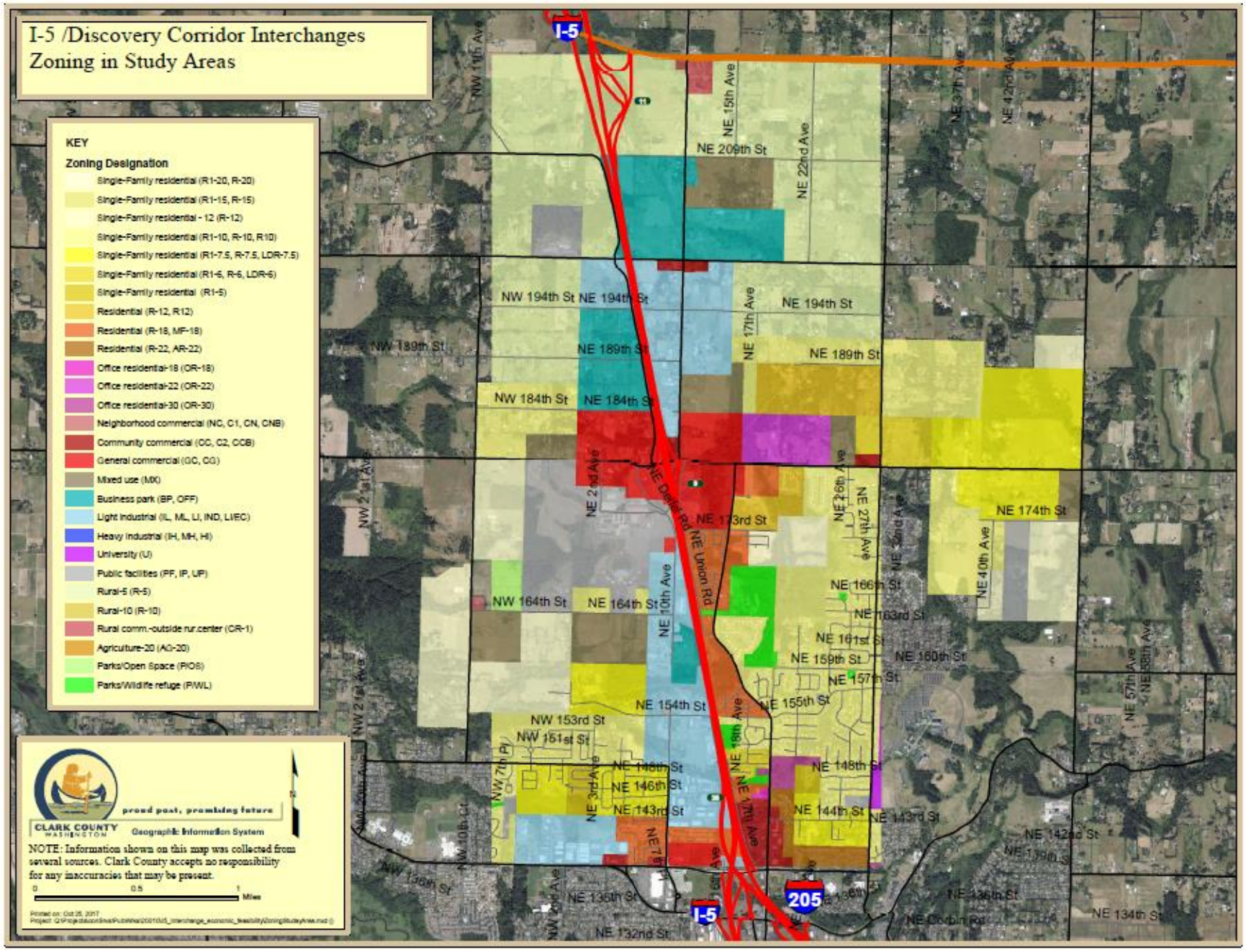
Land use planning associated with Clark County's Comprehensive Plan is implemented via property-specific zoning designations. Zoning and related land use regulations are provided by Title 40 of the county's Unified Development Code.

The Urban Holding area is associated with 11 separate zoning districts. The larger full study area encompasses a total of 21 zoning districts. As detailed with the chart (following the map on the next page), applicable zoning designations can be subsumed under broader categories of:

- Resource and rural districts
- Commercial, business, mixed use and industrial districts
- Urban area residential and office-residential districts
- Single-family residential districts
- Parks, open space and wildlife designations

The map on the next page illustrates current zoning designations applicable to the area surrounding the I-5/179th interchange. While the predominant land use designation has been for urban low density residential, properties closest to the interchange are indicated for a range of commercial, industrial, public facility, urban medium density, and mixed-use designations.

Of specific note is that industrial and business park zoning is situated away from the immediate interchange area – either north of 179th or south of the 179th commercial corridor. This means that future employment-focused development will likely depend on transportation and infrastructure investments beyond those anticipated for the immediate 179th Street corridor.


I-5 /Discovery Corridor Interchanges
Zoning in Study Areas
KEY
Zoning Designation
Single-Family residential (R1-20, R-20)
Single-Family residential (R1-15, R-15)
Single-Family residential - 12 (R-12)
Single-Family residential (R1-10, R-10, R10)
Single-Family residential (R1-7.5, R-7.5, LDR-7.5)
Single-Family residential (R1-6, R-6, LDR-6)
Single-Family residential (R1-5)
Residential (R-12, R12)
Residential (R-18, MF-18)
Residential (R-22, AR-22)
Office residential-18 (OR-18)
Office residential-22 (OR-22)
Office residential-30 (OR-30)
Neighborhood commercial (NC, C1, CN, CNB)
Community commercial (CC, C2, CCB)
General commercial (GC, CG)
Mixed use (MX)
Business park (BP, OFF)
Light industrial (IL, ML, LI, IND, LI/EC)
Heavy industrial (IH, MH, HI)
University (U)
Public facilities (PF, IP, UP)
Rural-5 (R-5)
Rural-10 (R-10)
Rural comm.-outside rur.center (CR-1)
Agriculture-20 (AG-20)
Parks/Open Space (P/OS)
Parks/Wildlife refuge (P/WL)
proud past, promising future
CLARK COUNTY
WASHINGTON
Geographic Information System
NOTE: Information shown on this map was collected from several sources. Clark County accepts no responsibility for any inaccuracies that may be present.
0
0.5
1
Miles
I-5
205
NE 209th St
NE 194th St
NW 194th St
NE 189th St
NW 189th St
NW 184th St
NE 184th St
NE 173rd St
NE 174th St
NW 164th St
NE 164th St
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NE 136th St
NE 134th St
NE 132nd St
NE Union Rd
NE Corbin Rd
NE 15th Ave
NE 22nd Ave
NE 17th Ave
NE 26th Ave
NE 27th Ave
NE 40th Ave
NE 10th Ave
NE 18th Ave
NE 3rd Ave
NE 57th Ave
NW 11th Ave
NW 21st Ave
NW 7th Pl
NW 10th Ct

I-5/179th Holding Area & Full Study Area Zoning Districts

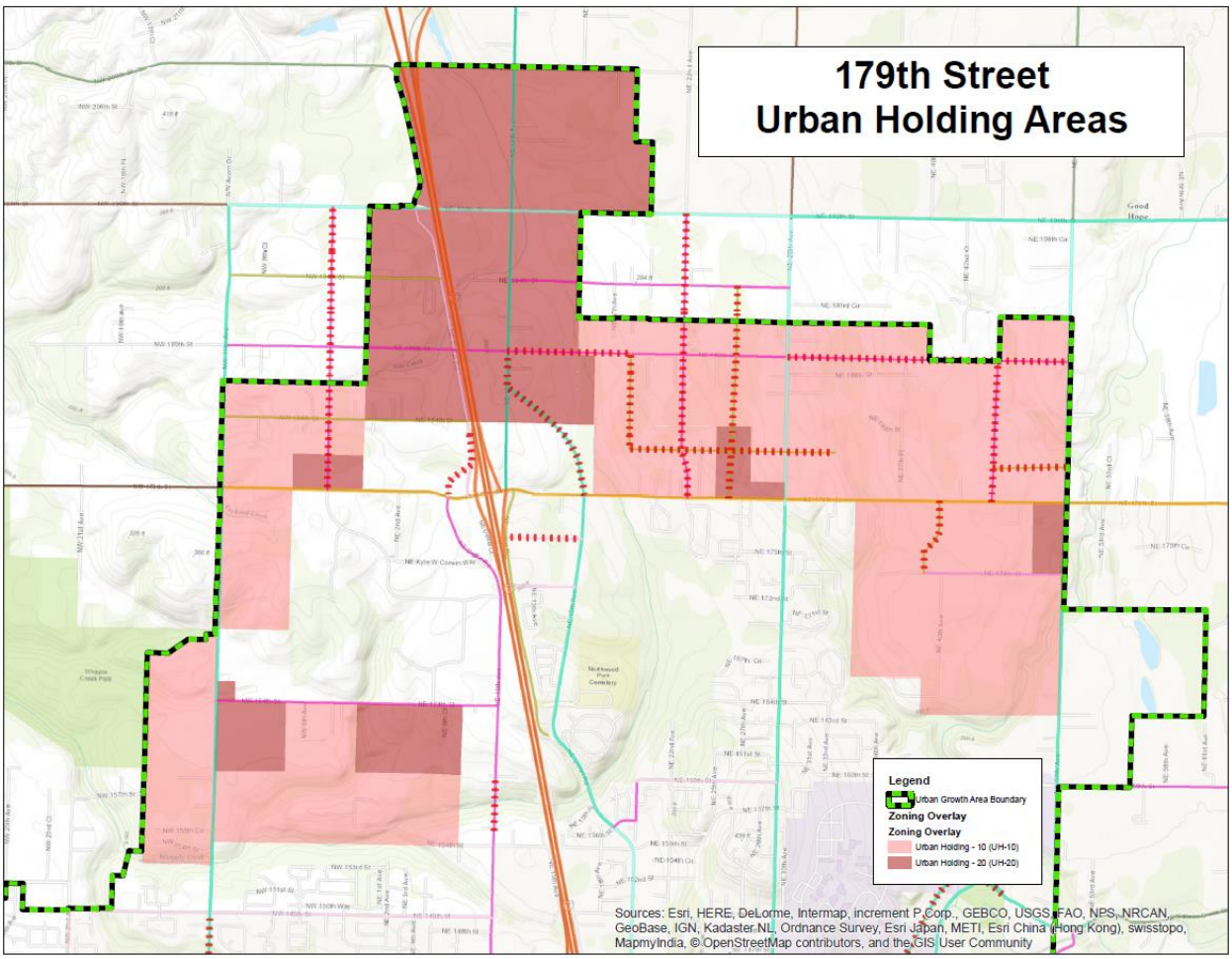
Zoning	Overview Description
Resource & Rural Districts:	
R-5	Intended for residential living and ag-forestry in rural areas; minimum 5-acre lot
CR-1 Rural Commercial	Intended to provide for the location of businesses and services that are sized to serve the rural community; CR-1 is a designation outside rural centers
Commercial, Business, Mixed Use & Industrial Districts:	
IL-Light Industrial	Intended for less-intensive industrial uses which produce little noise, odor and pollution; also provides for compatible resource-based uses and service uses
BP-Business Park	May include limited light manufacturing and wholesale trade, light warehousing, business and professional services, research, business, and corporate offices
PF-Public Facilities	For already developed public parks, open space, and facilities permanently in a specific location, such as schools and other governmental facilities
GC-General Commercial	Provides for a full range of goods and services necessary to serve large areas of the county and the traveling public, including service-industrial uses.
CC- Community Commercial	Provides for the regular shopping and service needs of several adjacent neighborhoods
MX-Mixed Use	Provides for a mix of mutually supporting retail, service, office and residential uses – integrating two or more land uses in a mutually supportive development
Urban Area Residential & Office-Residential Districts:	
OR-30	Provides for residential and professional office development, with minimum multifamily/office lot area of 10,000 sq ft (housing density of 18-30 units per acre)
OR-22	As with OR-30 (but at a residential density of 15-22 units per acre)
OR-18	As with OR-30/18 (but at a residential density of 12-18 units per acre)
R-22	Provides for medium/higher density residential development, at minimum lot area of 4,000 square feet (and density of 15-22 units per acre)
R-18	As with R-22, minimum lot area of 4,000 sq ft (density of 12-18 units per acre).
R-12	As with R-12/18, minimum lot area of 4,000 sq ft per unit (at 8-12 units per acre)
Single-Family Residential Districts:	
R1-5	Minimum average 5,000 square foot lot area, 4,000 square feet for duplex units; maximum 7,000 square foot lot (or density of 8.7-6.1 units per acre)
R1-6	Minimum average 6,000 square foot lot area, or 5,000 square feet for duplex units, maximum 8,500 square foot lot (or density of 7.3-5.1 units per acre)
R1-7.5	7,500 – 10,500 square foot lot area (or density of 5.8-4.1 units per acre)
R1-10	10,000-15,000 square foot lot area (or density of 4.4-2.9 units per acre)
R1-20	Minimum 20,000-30,000 maximum sq ft lot (density of 2.2-1.4 units per acre)
Parks, Open Space & Wildlife	
P/OS	Parks/open space designation for recreation and environmental protection
P/WL	Parks/wildlife designation as shown with zoning map

Notes: Zones in **bold face** are in Urban Holding areas. These plus other zones are with Discovery Corridor & LRF. Single family residential density ranges are for planned unit developments (PUDs).

Sources: Excerpted from Clark County Unified Development Code, Title 40.

URBAN HOLDING AREA

As illustrated by the following map, the horseshoe shaped Urban Holding (UH) area designation for the 179th Street area comprises approximately 2,100 acres. Urban scale development is effectively precluded pending completion of pertinent interchange improvements.



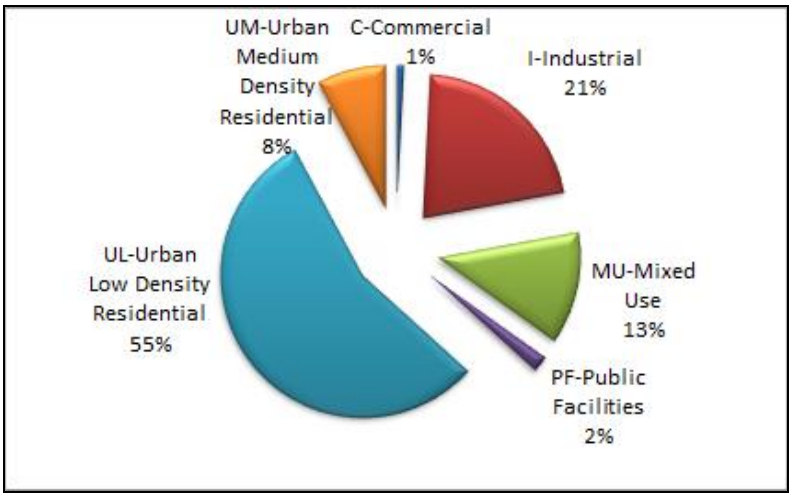
While within the Urban Growth Boundary (UGB), there are two specific Urban Holding overlays, described by Section 40.250.110 of the Clark County Unified Development Code as follows:

1) **The Urban Holding-10 overlay (UH-10)** – situated away from I-5 – is applied to protect lands identified within urban growth areas from premature residential development when public policy establishes urbanization criteria such as requiring annexation prior to development. The Urban Holding-10 district is also appropriate where public facilities are inadequate to support development under an urban residential zoning designation.[2]
2) **The Urban Holding-20 overlay (UH-20)** – much of which adjoins I-5 – has the same purpose as UH-10 except that the area is intended to be developed for industrial or office-type nonresidential uses; retention in larger lots is to ensure the site is adequate in size to accommodate large industrial or office developments now and in the future.

Holding Area Characteristics by Comprehensive Plan Designation. As illustrated by the graph to the right:

- Urban low residential accounts for the majority (55%) of land within the holding areas; medium density residential adds 8%.
- Industrial comprises 21%; commercial is at only 1% since C-zoned sites at I-5/179th are not directly affected by the holding zone.
- Mixed use zoning covers 13% of the land area, public facilities the remaining 2%.

I-5/179th Urban Holding Areas
% Distribution of Land Area Plan Designation



Source: Clark GIS and E. D. Hovee.

Holding Area Characteristics by Zoning. A more detailed look at existing uses is provided for each of 11 zoning designations found in in the UH areas. Both assessor and GIS acreage figures are noted – showing some modest measurement differences:

- R1-20 and R1-10 lower density residential comprise the largest acreage categories, followed by mixed use (MX) and employment (BP/IL) zones.
- Currently, there are just 467 housing units spread across all but the PF zones.
- Total building area is over 943,500 square feet – of which residential zones comprise 64%, employment 29% and MX 7%.

Current 179th Urban Holding Areas
Characteristics by Zoning Designation (2017)

Zoning	Site Area (Acres)		Housing Units	Building Area (SF)
	Assessor	GIS		
IL	192.16	186.48	62	131,902
BP	267.65	263.85	93	133,583
PF	39.55	38.73	0	0
CC	14.26	13.11	4	12,377
MX	270.14	261.30	27	62,748
OR-22	69.77	67.59	15	40,163
R-12	98.64	97.29	20	43,330
R1-6	54.71	52.37	12	21,387
R1-7.5	314.86	298.48	56	107,180
R1-10	374.48	365.02	98	222,701
R1-20	436.33	427.55	80	168,166
Totals	**2,132.55**	**2,071.79**	**467**	**943,537**

Source: Clark GIS and E. D. Hovee. See subsequent chart for zone summaries.

Property Valuation. As is detailed by the chart below, total assessed valuation of the I-5/179th holding zone area is estimated at approximately $163 million as of 2017. Of this, $70 million (43%) comprises land value with $92 million (57%) as building valuation. After deducting for tax exemptions, total taxable value of this targeted study area is $149 million (or 92% of the total assessed amount).

I-5/179th Interchange Urban Holding Areas Assessed Valuation (2017)

Zoning	Assessed Valuation			
	Land	Buildings	Total	Taxable
IL	$10,027,744	$9,925,801	$19,953,545	$18,030,305
BP	$7,258,717	$10,526,784	$17,785,501	$16,243,170
PF	$1,246,170	$0	$1,246,170	$0
CC	$892,445	$847,592	$1,740,037	$1,432,076
MX	$6,712,720	$5,484,065	$12,196,785	$9,303,903
OR-22	$2,608,355	$1,860,273	$4,468,628	$4,468,628
R-12	$3,365,707	$4,340,506	$7,706,213	$7,706,213
R1-6	$1,984,302	$2,944,095	$4,928,397	$4,549,461
R1-7.5	$8,341,444	$12,753,168	$21,094,612	$19,841,630
R1-10	$14,434,426	$25,059,958	$39,494,384	$37,358,356
R1-20	$13,479,945	$18,613,433	$32,093,378	$30,432,588
Totals	**$70,351,975**	**$92,355,675**	**$162,707,650**	**$149,366,330**

Sources: Clark GIS and E. D. Hovee.

Land value within the holding zones averages out to $33,000 per acre (or $0.76 per square foot). The range of tax assessed land values is from less than $30,000 per acre for BP, MX and R1-7.5 zoned property up to more than $50,000 per acre for IL and CC zoned land.

Critical Lands. Clark GIS data indicates that 964 acres or nearly one-half (47%) of the holding area overlays comprise critical areas and are not expected to support future development. Critical lands within the UH overlays are problematic for a greater share (58%) of employment than residential and mixed use zoned acreage (43%).[3]

Development Capacity. As depicted by the chart below and to the to the right, the next step in this analysis is to assess build-out capacity for additional housing and employment:

- Build-out is estimated at 4,815 added residential units for over 12,800 residents plus up to an added 2,850 jobs.
- The bulk of net new job potential is on MX, BP and IL zoned land; residential is from generally lower density single family zones, except for MX.

Capacity figures are as estimated via Clark GIS using the Clark County Vacant Buildable Lands Model (VBLM). Estimates represent capacity for additional development – above and beyond what is already built.

I-5/179th Urban Holding Areas Capacity

Zoning	Added Capacity @ Build-Out		
	Housing Units	Population	Jobs
IL	0	0	536
BP	0	0	917
PF	0	0	0
CC	0	0	85
MX	719	1,912	1,313
OR-22	227	605	0
R-12	363	965	0
R1-6	176	469	0
R1-7.5	993	2,640	0
R1-10	1,029	2,736	0
R1-20	1,308	3,480	0
Totals	**4,815**	**12,807**	**2,852**

Source: Clark GIS/VBLM and E. D. Hovee, 2017.

Employment densities with the VBLM model are estimated at 9.0 jobs per acre for net developable industrial land and 20.0 jobs per acre for commercial uses. Although allowed residential densities vary with the zone, VBLM data indicates that net vacant developable land is assumed to develop at an average density of 8.0 dwelling units (DUs) per acre. Actual employment and population will vary depending on densities realized as development occurs.

Added notes regarding development capacity are summarized as follows:

- Of the roughly 2,100 acres of holding zone land, just over 600 acres (or less than 30%) is **currently vacant**, as defined by the County's VBLM model.[4] The remaining 70% of land is already improved but often not to full urban development standards – meaning that a substantial portion of future development will come from intensified use of previously developed (but underutilized) parcels.
- Reliance on **already improved** properties is particularly apparent for residential uses. Nearly three-quarters (74%) of the 4,800+ housing units of added residential capacity is expected to come with increased utilization of already partially developed residential lands. In contrast, less than half (46%) of the added 2,850 job capacity forecast is expected to come with intensified use of existing properties.
- Even more striking is the reliance on future development of properties with **critical lands**. Fully 85% of added residential build-out potential is expected to occur on parcels affected by some level of critical land constraints. For employment lands, over 90% of added jobs are expected to occur on sites for which at least a portion of the tax parcel is identified with critical land constraints.

All of the development capacity estimates are based on zoning as of mid-2017 and do not reflect potential future changes to Comprehensive Plan or zoning designations. As an example, the Board of Clark County Councilors has been considering a change to three properties totaling 38.64 acres at the southeast quadrant of the 179th Street and NW 11th Avenue intersection from the Urban Low Density (UL) designation of the adopted 2016 Comprehensive Plan to an Urban Medium Density Residential (UM) plan designation. As changes such as these are approved, this development capacity analysis may be correspondingly modified.[5]

As proposed for this three-parcel site, accompanying zoning would be revised from R1-20 to R-12. Current R1-20 zoning allows for a density of 1.4-2.2 units per acre; potential R-12 zoning could allow a range of 8-12 units per acre.

While residential densities could increase and result in added traffic, the area has previously been modeled at the higher UM density as part of the assumptions used with the NE 179th Street / I-5 interchange analysis – with resulting ability to accommodate the projected densities once planned roadway improvements are made. In the meantime, this property (like others in the holding zone) is subject to Urban Holding until localized critical links and intersection improvements are funded per the 6-year Transportation Improvement Plan or through an approved development agreement.

Full Study Area

The full study area represents the combination of three geographies of importance to the economic future of the I-5/179th area.

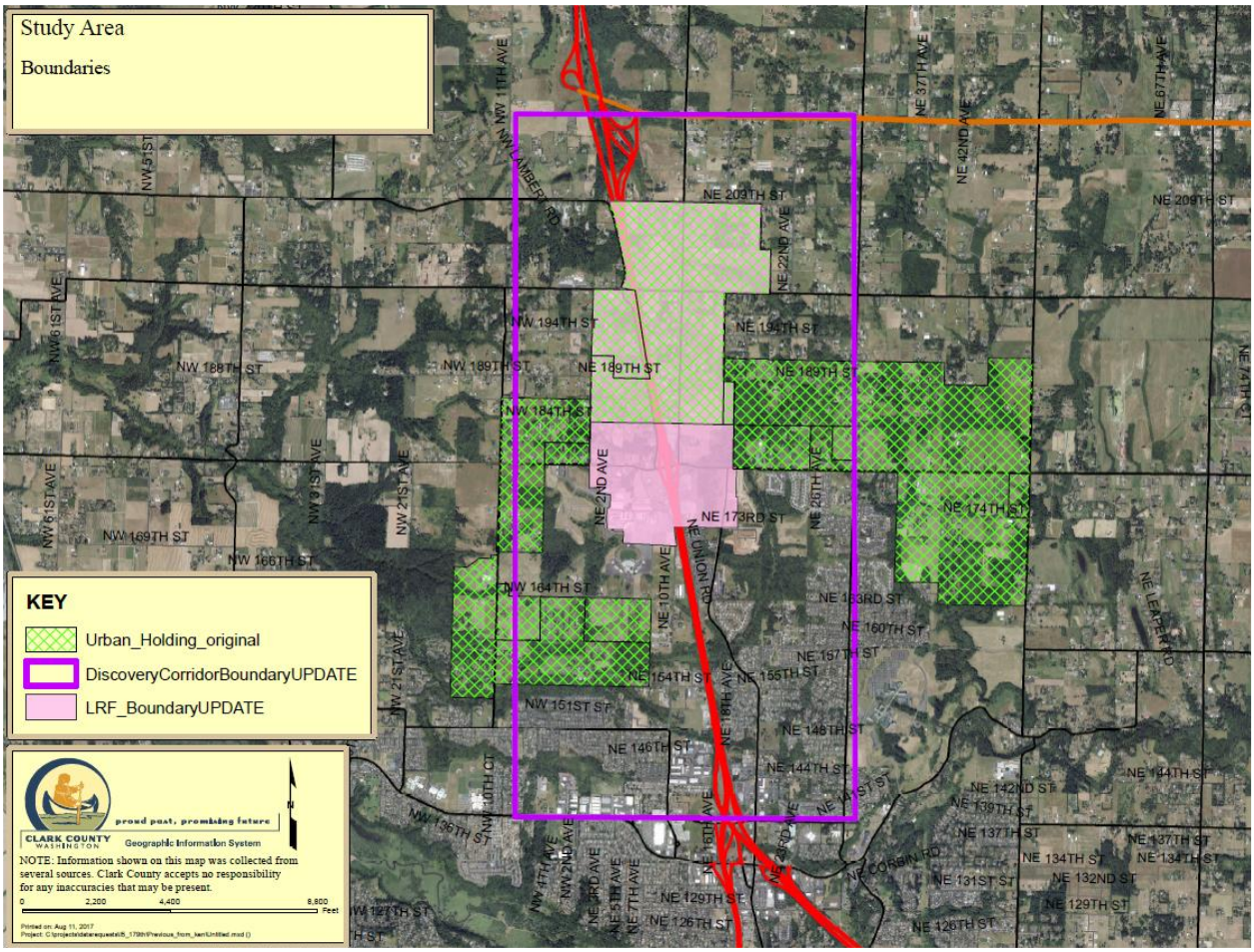
- **Urban Holding Areas** – as previously described with urban development contingent on improved infrastructure including reconstruction of the I-5/179th interchange.
- **Discovery Corridor** – as updated reflecting an area planned for significant added employment stretching north from the 139th Salmon Creek interchange area to the 219th Battle Ground interchange (not including the northern part of the Discovery Corridor extending further north to La Center).
- **Local Revitalization Funding (LRF) area** – an area on both sides of the I-5/179th interchange providing significant long-term commercial development opportunity in conjunction with state funding through the CERB/LIFT infrastructure program.

I-5/179th Full Study Area Geographies

Subarea	Acres
Urban Holding Area	2,132.55
Discovery Corridor	4,442.32
LRF Area	835.02
Total (w/o overlap)	**5,287.38**

Source: Clark GIS and E. D. Hovee.

As shown by the map on the next page, this southern Discovery Corridor area overlaps portions of the UH area and LRF areas. After deducting accounting for overlaps, the combined size of this full study area is approximately 5,287 acres – about 2½ times the size of the UH area alone.



This feasibility report treats the full study area as one combined geography. Having already described the Urban Holding overlay, a brief description is provided for the southern portion of the Discovery Corridor and full LRF area. This is followed by a more complete profile for the combined full study area geography.

Discovery Corridor

Clark County's Discovery Corridor was identified as one of 17 Focused Public Investment Areas (FPIAs) in 2003.[6] As initially described, the Discovery Corridor was situated about half in Vancouver's UGA and half in unincorporated Clark County – as the second largest FPIA in the county. Total potential industrial/commercial employment capacity with future build-out was estimated at 27,900 jobs with development on approximately 1,465 acres – including 553 acres of vacant land and 912 acres of redevelopment land. This would have included redevelopment of underutilized parcels including mostly single-family homes on 5- or 10-acre lots.

Needed potential infrastructure investments cited at the time were sewer (now provided by CRWWD), water (by CPU), transportation (Clark County and WSDOT), fire protection and emergency services (by local fire districts), addressing substantial stormwater and environmental issues (through Clark County), and electrical infrastructure (CPU).

This initial 2003 report noted that "transportation infrastructure is incomplete and existing roads are designed to serve rural rather than urban development." At the time, investment needs were noted for the NE 134th, 179th, 219th and Ridgefield (269th Street) interchanges. The need was also cited for a "frontage road system adjacent to I-5 to provide local land access."

Most of the interchanges noted have received significant upgrading together with supplemental new interchanges to (as at 139th and 219th). The remaining interchange improvement need is for 179th Street which is central to implementation of the full Discovery Corridor concept. The full study area for this I-5/179th area report covers the southern half of the Discovery Corridor, extending from 219th Avenue south to NE 139th Street.

This southern Discovery Corridor area approximates 4,442 acres – including current VBLM capacity for added industrial/commercial capacity of 400 acres. This covers a portion of the 1,465 acres of potentially developable employment land estimated in 2003 for the full corridor which previously also assumed conversion of residential land to industrial and commercial uses.

LRF Area

In 2009, Clark County obtained funding for *local revitalization funding* as an LRF program administered by the Washington State Department of Revenue (DOR). Five of six projects were awarded a state contribution through E2SSB 6609, based on applications in September 2009 for and award during a first come, first serve applications process.

These projects – including a 179th Revitalization Project in Clark County – were required to resubmit an application to the Department by September 1, 2010. The projects were then approved after an economic review was conducted by the University of Washington as outlined in E2SSB 6609.

In effect, the LRF program authorizes cities and counties to create "revitalization areas" and allows certain increases in local sales and use tax revenues and local property tax revenues generated from within the revitalization area, additional funds from other local public sources, and a state contribution to be used for payment of bonds issued for financing local public improvements within the revitalization area.

The state contribution is provided through a new local sales and use tax that is credited against the state sales and use tax (sometimes referred to as the "LRF tax"). This tax does not increase the combined sales and use tax rates paid by consumers. The maximum amount of state contribution for each demonstration project is specified in the bill, ranging from $200,000 to $500,000 per project.

Due to the Great Recession and ensuing challenges for retail development coupled with need for I-5/179th Street construction, the planned Three Creeks retail center has not yet been developed. While there is no specific timeline for completion of LRF projects, this has been expected to occur in conjunction with renewed north Clark County residential development for market support and with completion of interchange and related local street improvements. [7]

Clark County Local Revitalization Project

Project: 179th Street Revitalization Area **Award Amount: $500,000**
Sponsoring Government: Clark County

Proposed private development - Killian Pacific, DBA Fisher's Terrace VII LLC, has committed to development of a large regional retail center within the RA at a cost between $95 and $100 million. Construction is anticipated to begin in 2013 with the bulk of it taking place in 2014. Opening is anticipated prior to holiday shopping season in 2014. Retail development of this magnitude and regional reach is critical for recapturing Clark County (and state) sales tax revenue lost to Oregon. Killian Pacific hired E.D. Hovee, an economic analysis firm, to examine the extent of sales tax leakage from the area surrounding the 179th Street/I-5 interchange and received an estimate that approximately $620 million in annual retail sales are lost to Oregon. This new retail center is projected to curtail approximately $101 to $114 million of that loss. While Portland will continue to siphon potential retail sales so long as Oregon remains a sales-tax-free state, Clark County can counter a substantial portion of that damaging outflow by providing more convenient and more expansive retail opportunities closer to where residents live.

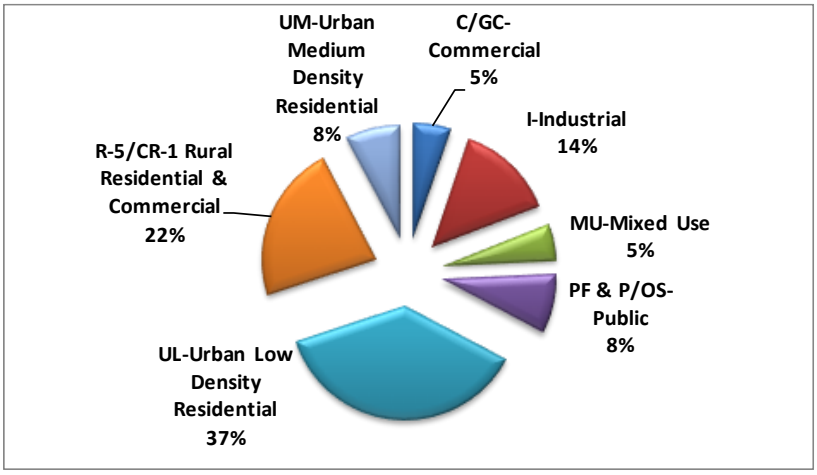
Proposed public improvements - Construction of a set of multi-lane roundabouts and/or signalized intersection improvements to the west and east of the existing I-5 interchange; reconfiguring the existing on and off ramps to I-5 northbound and southbound; improving approximately one-quarter mile of NE 179th Street between NE Delfel Road and NE 10th Avenue; widening NE 179th Street between NE 10th Avenue and 15th Avenue from two lanes to four lanes (70' wide) with two 12-foot wide travel lanes, two 11-foot wide travel lanes, medians, a 14-foot wide center left turn lane or median, 5-foot wide bicycle lanes, detached sidewalks, and improved storm drainage facilities.

- As described by Washington State Department of Revenue.[8]

Study Area Profile

Comp Plan Lands. The land distribution of the full study area differs from that of the UH area in that greater proportions of this larger area are designated for commercial and public use plus rural lands not found in the UH overlays. Urban medium density lands are in about the same proportion as in the UH area; other uses have smaller shares of the total.

I-5/179th Full Study Area
% Distribution of Land Area Plan Designation



Source: Clark GIS and E. D. Hovee.

Full Study Area Characteristics by Zoning. The full I-5/179th study area is covered by 21 different zoning designations – nearly double the 11 designations of the Urban Holding (UH) overlay areas. As shown by the following chart:

I-5/179th Full Study Area
Land Characteristics by Zoning Designation

Zoning	Site Area (Acres)		Housing Units	Building Area (SF)
	Assessor	GIS/VBLM		
R-5	1,183.77	-	285	579,091
CR-1	14.17	-	9	23,200
IL	453.95	443.61	98	1,185,562
BP	285.51	282.53	97	139,567
PF	349.70	307.93	0	430,383
GC	203.83	197.37	30	118,617
CC	56.28	54.23	7	438,202
MX	270.14	261.30	26	61,180
OR-18	1.77	1.74	3	2,908
OR-22	69.77	67.59	15	40,081
OR-30	16.90	16.66	1	3,016
R-22	36.92	42.26	659	714,879
R-18	138.67	135.81	681	1,035,154
R-12	141.42	139.51	134	43,330
R1-5	27.39	27.50	110	199,317
R1-6	67.45	65.17	87	130,277
R1-7.5	436.15	427.67	448	954,417
R1-10	925.83	940.85	1,812	3,962,105
R1-20	510.27	477.90	97	221,284
P/OS	36.24	35.72	0	0
P/WL	61.25	62.54	2	9,221
Totals	**5,287.38**	**3,987.89**	**4,601**	**10,291,791**

Source: Clark GIS and E. D. Hovee. See earlier chart for zone summaries.

- There is considerable difference between assessor and GIS/VBLM acreages, because rural (R-5/CR-1) lands are not included with County GIS/VBLM modeling.
- The full study area comprises just over 4,600 housing units, 10 times the existing housing inventory of the smaller UH area.
- Similarly, the 10.3 million square feet of residential plus commercial and industrial building area is 10 times the existing inventory of less than 1 million square feet in the UH portion of the full study area.
- While rural R-5 zoned land accounts for more acreage than any other zone, the urban R1-10 zone represents close to 40% of the residential units and total building space of the full study area.
- Lands zoned for industrial and commercial use account for over 1.9 million square feet of existing building area – less than 20% of the full study area total.

Property Valuation. As is detailed by the chart on the following page, total assessed valuation of the full study area exceeds $1.5 billion as of 2017. This is nine times the $163 million current assessed valuation of the Urban Holding (UH) area.

As it is currently relatively more developed, the full study area also has a higher ratio of improvements to land value than is the case for the UH area alone. Total assessed valuation is $287,000 per acre across the full study area as compared with $76,300 for the UH area alone.

I-5/179th Full Study Area Assessed Valuation (2017)

Zoning	Assessed Valuation			
	Land	Buildings	Total	Taxable
R-5	$51,089,358	$59,278,959	$110,368,317	$100,641,924
CR-1	$1,562,600	$546,800	$2,109,400	$2,109,400
IL	$44,638,530	$62,545,020	$107,183,550	$102,254,534
BP	$8,149,997	$10,875,001	$19,024,998	$17,482,667
PF	$25,923,322	$49,388,120	$75,311,442	$0
GC	$19,954,847	$9,535,236	$29,490,083	$28,087,585
CC	$25,423,984	$42,005,955	$67,429,939	$59,942,978
MX	$6,712,720	$5,484,065	$12,196,785	$9,303,903
OR-18	$513,800	$0	$513,800	$513,800
OR-22	$2,608,355	$1,860,273	$4,468,628	$4,468,628
OR-30	$4,825,900	$56,300	$4,882,200	$4,882,200
R-22	$6,579,674	$82,614,497	$89,194,171	$88,862,221
R-18	$31,956,081	$84,774,580	$116,730,661	$113,433,988
R-12	$8,217,989	$18,629,906	$26,847,895	$26,847,895
R1-5	$7,935,436	$20,889,647	$28,825,083	$28,654,353
R1-6	$7,469,911	$13,582,831	$21,052,742	$20,273,301
R1-7.5	$46,345,178	$100,958,506	$147,303,684	$144,513,882
R1-10	$168,370,111	$447,615,799	$615,985,910	$603,563,626
R1-20	$16,189,248	$18,613,433	$34,802,681	$33,141,891
P/OS	$307,743	$0	$307,743	$0
P/WL	$1,257,945	$2,007,815	$3,265,760	$378,615
Totals	**$486,032,729**	**$1,031,262,743**	**$1,517,295,472**	**$1,389,357,391**

Sources: Clark GIS and E. D. Hovee.

Land value for the full I-5/179th study area averages out to nearly $92,000 per acre – nearly triple the current $33,000 per acre land value of the UH area. This suggests considerably more value appreciation potential for the UH area – when developed. The current range of tax assessed land values for the full study area is from less than $30,000 per acre for BP, MX and P/OS zoned property up to more than $450,000 per acre (or more than $10 per square foot) for CC zoned land.

Critical Lands. Clark GIS data indicates that 1,858 acres of the full study area comprise critical areas and are not expected to support future development. This equates to 47% of land area in the UGA portion of the full study area, about the same proportion as for the smaller UH area.

Critical areas are problematic for a somewhat greater proportion of employment lands (47%) than for residential and mixed-use lands (43%). However, critical lands appear to be less problematic for employment lands outside than in the more narrowly defined UH Area.

Development Capacity. As detailed by the chart below, the next and final step with this full study area profile has been to assess VBLM build-out capacity for additional housing, population and employment:

I-5/179th Study Area Development Capacity

Zoning	Added Capacity @ Build-Out		
	Housing Units	Population	Jobs
R-5	-	-	-
CR-1	-	-	-
IL	-	-	1,132
BP	-	-	1,007
PF	-	-	-
GC	-	-	1,970
CC	-	-	127
MX	719	1,912	1,313
OR-18	9	23	-
OR-22	227	605	-
OR-30	58	154	-
R-22	3	9	-
R-18	91	242	-
R-12	447	1,188	-
R1-5	14	38	-
R1-6	182	483	-
R1-7.5	1,096	2,915	-
R1-10	1,356	3,607	-
R1-20	1,447	3,848	-
P/OS	-	-	-
P/WL	-	-	-
Totals	**5,648**	**15,023**	**5,550**

Source: Clark GIS/VBLM and E. D. Hovee, 2017.

- Build-out is estimated as accommodating close to 5,650 added housing units and an added 15,000+ residents. Because much of the remaining developable residential land is in the UH area, the number of new units is only 17% more than the 4,815 unit capacity of the UH portion of the study area. No added development is assigned by the county VBLM to R-5 lands outside of the Urban Growth Area (UGA).
- For employment land, the situation is considerably different. The 5,550 added potential jobs for the full study area is nearly double that which can be realized within the UH portion of the broader study area.
- For the full study area, added job potential is fairly evenly distributed across the spectrum of urban GC, MX, IL, and BP zones. The only exception is for CC designated lands, which appear to be near build-out capacity.
- Of the roughly 5,300 acres of land in the full study area, close to 1,800 acres (34%) is **currently vacant**, as defined by the County's VBLM model. This includes non-UGA lands which are not factored into VBLM projections of future development.
- As in the UH area, reliance on **already improved** properties is significant for residential uses, accounting for 67% of added housing capacity to build-out. By comparison, only 32% of added employment requires intensified use of already developed lands.

- As in the UH area, as much as 85-90% of future development in the full study area will require development on properties that include some **critical land** area on-site.

Parcel Sizing for Employment Use. A significant issue for light industrial (IL) and business park (BP) zoned buildable lands is that the existing inventory is fragmented across a relatively large number of small property holdings. At close to 238 acres of buildable BP/IL zoned lands on 102 tax parcels, this works out to an average of just 2.3 buildable acres per tax parcel. Of this VBLM identified buildable inventory for **industrial use:**

- Only three parcels have 10 or more buildable acres each (totaling 36 acres buildable)
- Nine parcels have 5-10 acres buildable (totaling 59 acres buildable)
- Over half the buildable inventory consists of parcels with 1-5 acres buildable apiece (totaling 130 acres)
- The remaining 26 parcels have less than one acre buildable area (totaling 13 acres)

There is also considerable fragmentation of GC, CC, and MX zoned parcels identified by the VBLM for commercial employment use. The buildable total of 171 acres works out to an average of just 2.2 buildable acres per tax parcel across 73 parcels. As with industrially zoned property, there are only three parcels with 10+ buildable acres per tax lot.

However, the situation for **commercially designated** parcels is currently less severe than the numbers might indicate. This is because considerable private sector parcel assembly has already occurred – most notably with the Three Creeks retail and mixed use development planned for the south and north sides of 179th Street, just east of the I-5 interchange.

There is also some added employment that may be generated from **Office-Residential** (OR) zoned properties. The VBLM assigns residential but no employment use to these lands, much of which is highly constrained by critical area. Out of 88 acres per assessor's data, less than 37 acres are indicated as net buildable.

As is further detailed in the Section IV Market analysis, there is at least one possible assemblage of OR-zoned land that has been considered for employment use by the Columbia River Economic Development Council (CREDC). This is a potential 35-acre multi-property assemblage situated on the 179th street corridor, just east of GC zoned property that comprises the Three Creeks planned development area.

As indicated by this discussion, incentives for property assembly may prove pivotal in achieving a meaningful employment base for the I-5/179th study area. In some cases, re-zoning to create additional BP or IL land may be appropriate to consider where development has been limited to date. Otherwise, future employment uses will likely involve primarily smaller firms with limited employment potential. And absorption demand can be expected to be considerably reduced, resulting in a potentially much longer time period to achieve employment build-out.

III. ECONOMIC & FISCAL ASSESSMENT

A key component of this feasibility study has involved the formulation of an economic model to quantitatively assess the economic and fiscal impacts associated with the I-5/179th interchange project and associated infrastructure improvements. On a preliminary basis, this analysis has been run for the 2,100 acre Urban Holding area and for the nearly 5,300 acre I-5/179th full study area – using assessor and vacant buildable lands model (VBLM) data sets as provided by Clark County GIS.

Key steps in this impact modeling process involve:

1. Creation of an assumed development program (or set of input assumptions)
2. Estimation of direct and economic multiplier effects
3. Estimation of direct fiscal tax revenues for benefitted jurisdictions

Each of these steps is briefly described with results illustrated, in turn – first for the Urban Holding area and then for the full impact area.

URBAN HOLDING AREA IMPACTS

A long-term development program is predicated on Clark County prepared VBLM developable land estimates by zoning designation. To this is added estimates of **one-time** construction related employment, business related revenues and resulting tax revenues – notably real estate excise tax (REET) and sales tax.

Similar calculations are made for annual **on-going** operations (post construction) – with tax revenue estimates expanded to also include property taxes. All economic and fiscal estimates are as of the time of study area development build-out. Tax rates are those in effect as of 2017 (prior to the new state schools levy implemented by the Legislature), leading to a one-year spike in 2018 followed by expected rate moderation thereafter.

Development Program

As shown by the chart on the following page, VBLM results indicate potential for development of more than 830 acres within the urban area. Over 600 acres (72%) of developable area is anticipated for residential uses with 230+ acres (28%) for commercial and industrial use. The majority of industrial development is expected to occur on BP zoned land with the majority of commercial development on MX zoned land.

At build-out, the Urban Holding area will accommodate an added 4,815 housing units plus an estimated added 2,850 jobs – totaling over 12 million square feet of added residential and commercial/industrial building space. Employment potential is split nearly evenly between commercial and industrial uses.

Urban Holding Area Development Program (At Build-Out)

DEVELOPMENT FACTOR	ZONING DESIGNATION											
	IL	BP	PF	CC	MX	OR-22	R-12	R1-6	R1-7.5	R1-10	R1-20	Totals
VBLM Developable Acreage												
Residential	-	-	-	-	89.86	28.41	45.33	22.04	124.07	128.58	163.54	**601.82**
Commercial	-	-	-	4.24	65.67	-	-	-	-	-	-	**69.91**
Industrial	59.60	101.91	-	-	-	-	-	-	-	-	-	**161.51**
Total	59.60	101.91	-	4.24	155.52	28.41	45.33	22.04	124.07	128.58	163.54	**833.23**
Density Factors												
Residential DU/Acre												
Per VBLM Outputs	-	-	-	-	8.0	8.0	8.0	8.0	8.0	8.0	8.0	**8.0**
Employees/Acre												
Commercial	-	-	-	20.0	20.0	-	-	-	-	-	-	**20.0**
Industrial	9.0	9.0	-	-	-	-	-	-	-	-	-	**9.0**
Planning Outputs												
Housing Units	-	-	-	-	719	227	363	176	993	1,029	1,308	**4,815**
Population	-	-	-	-	1,912	605	965	469	2,640	2,736	3,480	**12,807**
Population/Unit	-	-	-	-	2.66	2.66	2.66	2.66	2.66	2.66	2.66	**2.66**
Employment												
Commercial	-	-	-	85	1,313	-	-	-	-	-	-	**1,398**
Industrial	536	917	-	-	-	-	-	-	-	-	-	**1,454**
Total	536	917	-	85	1,313	-	-	-	-	-	-	**2,852**
Building NSF per Unit												
Residential (per DU)	-	-	-	-	850	1,100	1,900	1,800	1,700	2,350	2,800	
Commercial (per job)	-	-	-	500	500	-	-	-	-	-	-	
Industrial (per job)	1,250	750	-	-	-	-	-	-	-	-	-	
New Building Area (NSF)												
Residential	-	-	-	-	611,000	250,000	689,000	317,000	1,687,000	2,417,000	3,663,000	**9,634,000**
Commercial	-	-	-	42,000	657,000	-	-	-	-	-	-	**699,000**
Industrial	670,000	688,000	-	-	-	-	-	-	-	-	-	**1,358,000**
Employment Subtotal	670,000	688,000	-	42,000	657,000	-	-	-	-	-	-	**2,057,000**
Total All Uses	670,000	688,000	-	42,000	1,268,000	250,000	689,000	317,000	1,687,000	2,417,000	3,663,000	**11,691,000**
New Building Area (GSF)	670,000	724,000	-	47,000	1,492,000	294,000	766,000	317,000	1,687,000	2,417,000	3,663,000	**12,077,000**
Net to Gross %	100%	95%	100%	90%	85%	85%	90%	100%	100%	100%	100%	**97%**

Source: E. D. Hovee from Clark GIS base data and VBLM outputs.

The VBLM density assumption is to be 8.0 units per acre averaged across all residential zones, though each zoning category is associated with its own residential density targets. Consequently, development might occur in portions of the UH overlay area at different densities from this assumed overall average.[9]

Direct & Economic Multiplier Effects

As noted, a second major component of the impact analysis involves the estimation of direct and economic multiplier impacts of added development. Economic variables of primary interest are jobs, payrolls and business revenues.

Some of these estimates (especially business revenues) serve as inputs for subsequent assessment of fiscal impacts. Impacts are evaluated separately for construction activities followed by on-going operations upon project completion. The chart to the right illustrates results of preliminary calculations for the properties in the Urban Holding area.

- **Direct effects** are those occurring on-site at affected properties in the study area – identified separately for construction and then for operations.
- **Economic multiplier impacts** result from indirect business spending plus induced consumer expenditures occurring as *ripple effects* throughout Clark County. Multipliers are specific to the type of economic activity being evaluated.

Direct & Economic Multiplier Effects (Urban Holding Areas – At Build-Out)

Type of Impact	Estimate	Comments
Construction (One-Time)		
Direct Jobs	**11,758**	Measured as job-years w/ phased construction over a multi-year period
Direct + Indirect Jobs	**16,814**	
Multiplier	1.43	
Direct Payroll	**$793,667,000**	Direct payroll is for construction workers, multiplier for spin-off
Direct + Indirect Payroll	$1,015,893,000	
Multiplier	1.28	
Direct Revenues	**$2,305,319,000**	Multiplier covers Clark County impact over construction duration
Direct + Indirect Revenues	$3,158,287,000	
Multiplier	1.37	
Operations (Annual)		
Direct Jobs	**2,852**	Direct jobs are on-site as of build-out, mulplier for county-wide impact
Direct + Indirect Jobs	**3,999**	
Multiplier	1.40	
Direct Payroll	**$119,741,000**	Payroll is annual average in 2007 dollars for on-going jobs
Direct + Indirect Payroll	$162,623,000	
Multiplier	1.36	
Direct Revenues	**$478,734,000**	Covers total revenues, multiplier is weighted based on use mix
Direct + Indirect Revenues	$649,236,000	
Multiplier	1.36	

Source: Multipliers are specific to Clark County per IMPLAN.

Expansion of the study area to include the southern portion of the Discovery Corridor and LRF areas substantially increases the economic development impacts – as detailed in the next section of this report.

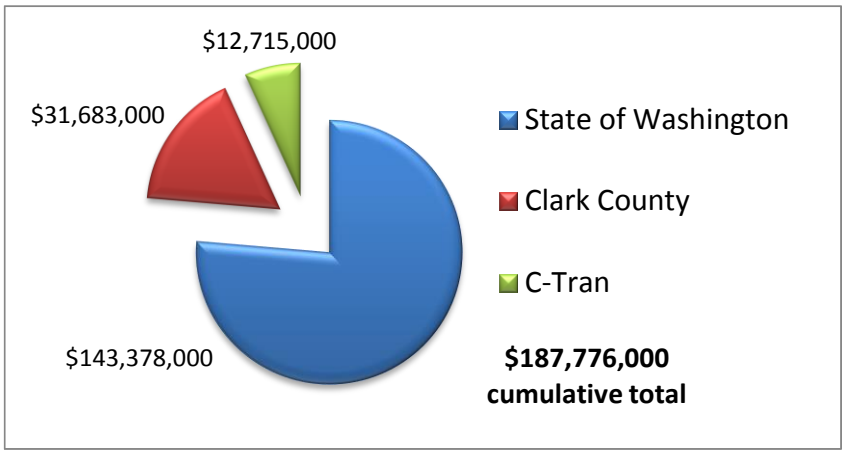
Fiscal Effects

Added tax revenues associated with study area development are those associated with direct on-site development. The graphs to the right depict revenues by jurisdiction:

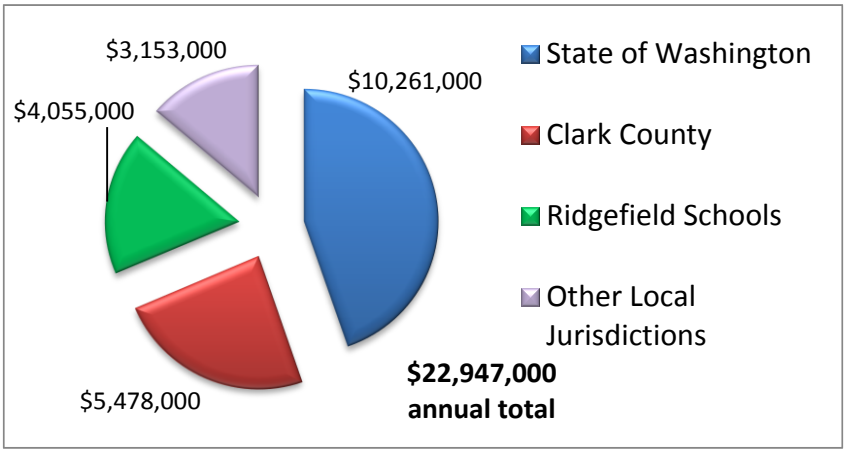
- One-time tax revenues associated with the period of **construction** are REET (based on land sales and sale of completed buildings) and sales tax (on value of construction).
- Post-construction, **on-going annual** tax revenues of significance are the added property tax (with development) together with REET (from periodic property re-sales) and sales tax (on taxable business revenues).

Added Tax Revenues with Development (Urban Holding Areas – At Build-Out)

Construction Effects (Cumulative To Build-Out)



Operating Effects (Average Annual – After Build-Out)



Note: All estimates are in 2017 dollars and tax rates.

The table on the next page provides a more detailed breakout of tax revenues by jurisdiction.

Estimated Tax Revenues by Jurisdiction with Construction & Operations (Urban Holding Areas – At Build-Out)

Benefited Jurisdiction	Applicable Tax Rate	One Time (w/ Construction)	On-Going (Per Year)	Tax Notes
Property Tax	Rate per $1,000 TAV			
School M&O	$2.2095148070	Not applicable with construction	$2,631,000	Ridgefield School District #122
WA State Schools	$1.9808714249		$2,359,000	State of Washington
Fire/EMS (Composite)	$1.6218032503		$1,931,000	Fire Districts 6, 11/12 Average
School Debt	$1.1961595879		$1,424,000	Ridgefield School District #122
County Roads	$1.3892465352		$1,654,000	Clark County
County General Fund	$1.1367196441		$1,353,000	General Fund
Fort Vancouver Library	$0.4172146004		$497,000	Regional Library
Port of Ridgefield	$0.1985610231		$236,000	General Fund
County Roads Diversion	$0.1827150739		$218,000	Fire District 12 Bond
Conservation Future	$0.0462087995		$55,000	Clark County
Development Disability	$0.0133019546		$16,000	Clark County
Mental Health	$0.0133019546		$16,000	Clark County
Veterans Assistance	$0.0119717513		$14,000	Clark County
Total Levy	**$10.4175904068**	--	**$12,404,000**	Levy without exemptions
Sales Tax	Rate % of Taxable Sales			
State of Washington	6.50%	$118,068,000	$4,537,000	
CTRAN	0.70%	$12,715,000	$489,000	For PTBA/UGA portion
Clark County	1.00%	$18,164,000	$698,000	
County Law & Justice	0.10%	$1,816,000	$70,000	
County Mental Health	0.10%	$1,816,000	$70,000	
Total All Jurisdictions	**8.40%**	**$152,579,000**	**$5,864,000**	On construction + retail Sales
* Note:	All estimates rounded.			
Real Estate Excise Tax				Assumes 6 yr average turnover
State of Washington	1.28%	$25,310,000	$3,365,000	
Clark County	0.50%	$9,887,000	$1,314,000	
Total	**1.78%**	**$35,197,000**	**$4,679,000**	Same rate for all Clark Co except Yacolt @ 1.53%
Total Property, REET & Retail Sales Tax		**$187,776,000**	**$22,947,000**	

Notes: Estimated as of year of build-out using 2017 tax rates and 2017 (uninflated) dollars.

As detailed by the table, anticipated one-time revenues to state and local taxing jurisdictions total an estimated $188 million. Included are sales tax and REET revenues, which are spread-out over the multi-year duration of construction through to Urban Holding area build-out.

On-going revenues are estimated at just under $23 million per year – as a combination of property, sales tax and REET (with periodic property resales). Both for one-time and on-going revenues, the state of Washington is the governmental jurisdiction most directly benefitted.

I-5/179TH FULL STUDY AREA IMPACTS

The full study area reflects the combination of the Urban Holding overlay, southern portion of the Discovery Corridor, and LRF areas. As with the holding zone discussion, this analysis begins with a review of build-out development for the full study area – driven by developable land estimates by zoning district as outputs from the County's vacant buildable lands model (VBLM).

To this can be added estimates of one-time construction related employment, business related revenues and resulting tax revenues – notably real estate excise tax (REET) and sales tax. Calculations are then made for annual on-going operations (post construction) – with tax revenue estimates expanded to also include property taxes (based on 2017 rates). All economic and fiscal estimates are as of the time of ultimate study area development build-out.

Development Program

As detailed by the chart on the following page, VBLM results indicate potential for development of nearly 1,115 currently undeveloped acres by build-out. This is 280+ acres (34%) more developable land than is available in the Urban Holding areas alone. Future development is spread across 16 zoning districts for the full study area – as compared with 10 zones for the Urban Holding area.

VBLM land for residential development increases from just over 600 acres for the Urban Holding areas to more than 705 acres with the full study area. This represents a less than 20% increase in developable acreage.

Industrial and commercial land increases from about 230 acres with the Urban Holding areas to nearly 410 acres of potential employment land in the full study area – a better than 75% increase. Industrial (IL) zoned land is much more prominent in the full study area than in the Urban Holding overlay areas. General Commercial (GC) zoning also is more prominent with the full study area – as GC designated property close to the interchange is not in the UH overlay.

At build-out, the full study area can be expected to accommodate nearly 5,650 added residential units. This represents a less than 20% increase in the number of housing units anticipated as compared with just the UH area. As noted, VBLM densities are assumed at 8.0 units per acre across all residential zones. If currently zoned mid-point densities are applied for each residential zone, residential development capacity is increased to about 5,700 units – a less than 1% increase in estimated potential housing build-out capacity.

Employment potential goes from 2,850 Urban Holding jobs at build-out to 5,550 jobs for the full study area. This represents a near doubling of job potential with addition of the Discovery Corridor and LRF areas to the Urban Holding area most directly dependent on I-5/179th interchange improvements. Employment is split 60/40 to commercial versus industrial use.

Build-out capacity of the full study area is 15.7 million square feet of job- and housing-related building area. This is 30% more than the developed square footage for the UH areas alone.

Full Study Area Development Program (At Build-Out)

DEVELOPMENT FACTOR	ZONING DESIGNATION																
	IL	BP	GC	CC	MX	OR-30	OR-22	OR-18	R-22	R-18	R-12	R1-5	R1-6	R1-7.5	R1-10	R1-20	Totals
VBLM Developable Acreage																	
Residential	-	-	-	-	89.86	7.22	28.41	1.07	0.41	11.36	55.84	1.80	22.70	136.99	169.50	180.82	**705.98**
Commercial	-	-	98.50	6.36	65.67	-	-	-	-	-	-	-	-	-	-	-	**170.53**
Industrial	125.78	111.90	-	-	-	-	-	-	-	-	-	-	-	-	-	-	**237.68**
Total	125.78	111.90	98.50	6.36	155.52	7.22	28.41	1.07	0.41	11.36	55.84	1.80	22.70	136.99	169.50	180.82	**1,114.19**
Density Factors																	
Residential DU/Acre																	
Per VBLM Outputs	-	-	-	-	8.0	8.0	8.0	8.0	8.0	8.0	8.0	8.0	8.0	8.0	8.0	8.0	**8.0**
Employees/Acre																	
Commercial	-	-	20.0	20.0	20.0	-	-	-	-	-	-	-	-	-	-	-	**20.0**
Industrial	9.0	9.0	-	-	-	-	-	-	-	-	-	-	-	-	-	-	**9.0**
Planning Outputs																	
Housing Units	-	-	-	-	719	58	227	9	3	91	447	14	182	1,096	1,356	1,447	**5,648**
Population	-	-	-	-	1,912	154	605	23	9	242	1,188	38	483	2,915	3,607	3,848	**15,023**
Population/Unit	-	-	-	-	2.66	2.66	2.66	2.66	2.66	2.66	2.66	2.66	2.66	2.66	2.66	2.66	**2.66**
Employment																	
Commercial	-	-	1,970	127	1,313	-	-	-	-	-	-	-	-	-	-	-	**3,411**
Industrial	1,132	1,007	-	-	-	-	-	-	-	-	-	-	-	-	-	-	**2,139**
Total	1,132	1,007	1,970	127	1,313	-	-	-	-	-	-	-	-	-	-	-	**5,550**
Building NSF per Unit																	
Residential (per DU)	-	-	-	-	850	1,000	1,100	1,250	1,100	1,250	1,900	1,850	1,800	1,700	2,350	2,800	
Commercial (per job)	-	-	500	500	500	-	-	-	-	-	-	-	-	-	-	-	
Industrial (per job)	1,250	750	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
New Building Area (NSF)																	
Residential	-	-	-	-	611,000	58,000	250,000	11,000	4,000	114,000	849,000	27,000	327,000	1,863,000	3,187,000	4,050,000	**11,351,000**
Commercial	-	-	985,000	64,000	657,000	-	-	-	-	-	-	-	-	-	-	-	**1,706,000**
Industrial	1,415,000	755,000	-	-	-	-	-	-	-	-	-	-	-	-	-	-	**2,170,000**
Employment Subtotal	1,415,000	755,000	985,000	64,000	657,000	-	-	-	-	-	-	-	-	-	-	-	**3,876,000**
Total All Uses	1,415,000	755,000	985,000	64,000	1,268,000	58,000	250,000	11,000	4,000	114,000	849,000	27,000	327,000	1,863,000	3,187,000	4,050,000	**15,227,000**
New Building Area (GSF)	1,415,000	795,000	1,094,000	71,000	1,492,000	68,000	294,000	12,000	5,000	127,000	849,000	27,000	327,000	1,863,000	3,187,000	4,050,000	**15,676,000**
Net to Gross %	100%	95%	90%	90%	85%	85%	85%	90%	85%	90%	100%	100%	100%	100%	100%	100%	**97%**

Source: E. D. Hovee from Clark GIS base data and VBLM outputs.

Direct & Economic Multiplier Effects

As was provided for the Urban Holding areas, evaluation of direct and economic multiplier effects are also estimated for the full study area. Economic variables of primary interest are jobs, payrolls and business revenues.

The chart below and to the right illustrates results of preliminary calculations for the properties of the full study area:

- **Direct effects** of on-site economic activity include nearly 15,000 job-years spread out over the duration of construction followed by on-going on-site employment of about 5,550 jobs when all business facilities are fully operational.
- **Economic multiplier impacts** involve an estimated 43% add-on to direct construction employment from businesses that serve construction firms and workers throughout Clark County. For resulting on-site businesses, there is an estimated 38% add-on to what happens in the study area spread county-wide.

Direct & Economic Multiplier Effects
(Full Study Area – At Build-Out)

Type of Impact		Estimate	Comments
Construction (One-Time)			
	Direct Jobs	**14,976**	Measured as job-years w/ phased construction over a multi-year period
	Direct + Indirect Jobs	21,414	
	Multiplier	1.43	
	Direct Payroll	**$1,010,884,000**	Direct payroll is for construction workers, multiplier for spin-off
	Direct + Indirect Payroll	$1,293,933,000	
	Multiplier	1.28	
	Direct Revenues	**$2,929,650,000**	Multiplier covers Clark County impact over construction duration
	Direct + Indirect Revenues	$4,013,620,000	
	Multiplier	1.37	
Operations (Annual)			
	Direct Jobs	**5,550**	Direct jobs are on-site as of build-out, mulplier for county-wide impact
	Direct + Indirect Jobs	7,670	
	Multiplier	1.38	
	Direct Payroll	**$223,044,000**	Payroll is annual average in 2007 dollars for on-going jobs
	Direct + Indirect Payroll	$301,478,000	
	Multiplier	1.35	
	Direct Revenues	**$862,430,000**	Covers total revenues, multiplier is weighted based on use mix
	Direct + Indirect Revenues	$1,171,306,000	
	Multiplier	1.36	

Source: Multipliers are specific to Clark County per IMPLAN.

Overall, the full study area is associated with an added 27% impact to **construction-related** jobs, payrolls and business revenues – as compared to what would be expected from the Urban Holding areas alone. When considered from the standpoint of **on-going business operations** post-construction, the economic contribution of the full study area is even greater. The full study area offers potential to deliver nearly double the impact on jobs, payrolls and business revenues as can be expected from the Urban Holding areas alone.

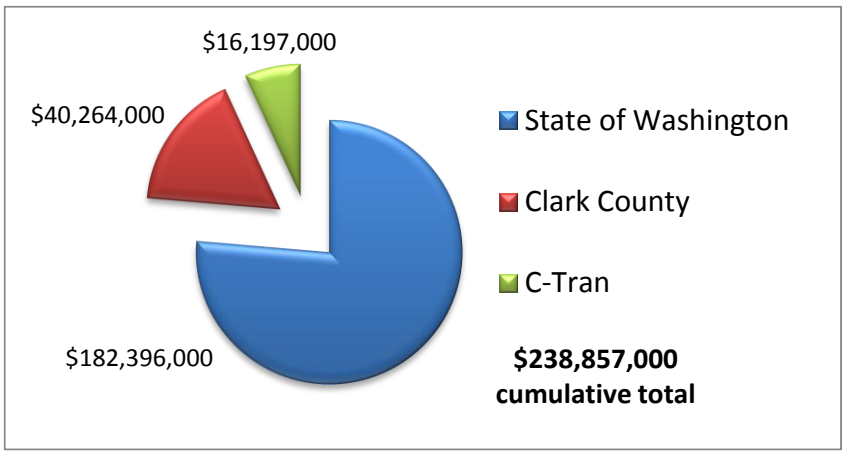
Fiscal Effects

As noted, added tax revenues associated with study area development are limited to those associated with direct on-site development. The graphs to the right depict revenues by jurisdiction:

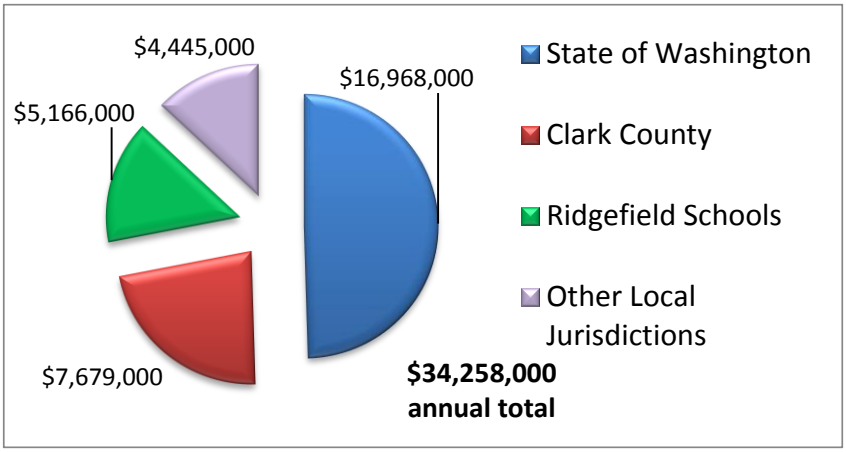
- **One-time** REET and sales tax revenues associated with the period of **construction** are estimated at a cumulative total of $239 million to all state and local taxing jurisdictions, spread over the multi-year duration of construction
- Post-construction, **on-going annual** tax revenues are estimated at over $34 million per year, including property as well as REET and sales tax revenues.

Added Tax Revenues with Development (Full Study Area – At Build-Out)

Construction Effects (Cumulative To Build-Out)



Operating Effects (Average Annual – After Build-Out)



Note: All estimates are in 2017 dollars and tax rates.

The one-time construction-related revenue generated from the full study area is about 27% above what could be expected from development of the Urban Holding areas alone. The gap is even greater with the operating effects – as the non-holding areas have a greater share of the added employment than added residential potential. On-going revenues from the full study area are estimated to be nearly 50% above what might be realized from UH areas alone at full build-out.

More detailed calculations of one-time and on-going tax revenues – by jurisdiction – at build-out are provided by the chart on the following page.

Estimated Tax Revenues by Jurisdiction with Construction & Operations (Full Study Area – At Build-Out)

Benefited Jurisdiction	Applicable Tax Rate	One Time (w/ Construction)	On-Going (Per Year)	Tax Notes
Property Tax	Rate per $1,000 TAV			
School M&O	$2.2095148070	Not applicable with construction	$3,352,000	Ridgefield School District #122
WA State Schools	$1.9808714249		$3,005,000	State of Washington
Fire/EMS (Composite)	$1.6218032503		$2,460,000	Fire Districts 6, 11/12 Average
School Debt	$1.1961595879		$1,814,000	Ridgefield School District #122
County Roads	$1.3892465352		$2,107,000	Clark County
County General Fund	$1.1367196441		$1,724,000	General Fund
Fort Vancouver Library	$0.4172146004		$633,000	Regional Library
Port of Ridgefield	$0.1985610231		$301,000	General Fund
County Roads Diversion	$0.1827150739		$277,000	Fire District 12 Bond
Conservation Future	$0.0462087995		$70,000	Clark County
Development Disability	$0.0133019546		$20,000	Clark County
Mental Health	$0.0133019546		$20,000	Clark County
Veterans Assistance	$0.0119717513		$18,000	Clark County
Total Levy	**$10.4175904068**	--	**$15,801,000**	Levy without exemptions
Sales Tax	Rate % of Taxable Sales			
State of Washington	6.50%	$150,402,000	$9,758,000	
CTRAN	0.70%	$16,197,000	$1,051,000	For PTBA/UGA portion
Clark County	1.00%	$23,139,000	$1,501,000	
County Law & Justice	0.10%	$2,314,000	$150,000	
County Mental Health	0.10%	$2,314,000	$150,000	
Total All Jurisdictions	**8.40%**	**$194,366,000**	**$12,610,000**	On construction + retail sales
* Note:	All estimates rounded.			
Real Estate Excise Tax				Assumes 6 yr average turnover
State of Washington	1.28%	$31,994,000	$4,205,000	
Clark County	0.50%	$12,497,000	$1,642,000	
Total	**1.78%**	**$44,491,000**	**$5,847,000**	Same rate for all Clark Co except Yacolt @ 1.53%
Total Property, REET & Retail Sales Tax		**$238,857,000**	**$34,258,000**	

Notes: Estimated as of year of build-out using 2017 tax rates and 2017 (uninflated) dollars.

As detailed by the table, anticipated one-time revenues to state and local taxing jurisdictions total an estimated $239 million. More than three-quarters (76%) of one-time tax revenues accrue to the State of Washington with 24% to Clark county and local jurisdictions.

On-going revenues are estimated at more than $34 million per year. These recurring revenue streams are split nearly 50/50 between the state and local jurisdictions in Clark County.

SUMMARY NOTES

By way of summary, the chart to the right compares key economic impact indicators for the Urban Holding areas with the full study area.

While the Urban Holding areas comprise the bulk of developable land, the ability of the I-5/179th interchange to influence the larger full study area is significant. The added benefit of leveraged development in this greater area is most important for added jobs.

While the I-5/179th full study area adds 34% more developable land overall, this expanded area increases the commercial/ industrial land benefited by 76%. Direct employment is nearly doubled (up by 95%) as the full study area includes both considerable industrial land in the Discovery Corridor area (extending north from the UH areas) plus commercial land in the LRF area (to the south of the UH overlay).

One-time construction revenues are up by just 27%. On-going revenues increase much more, particularly for sales tax.

Comparison of UH & Full Study Area Impacts

Description	Urban Holding Areas	Full Study Area	% Chg
DEVELOPMENT PROGRAM			
Land Area (Acres)			
VBLM Developable	**833.23**	**1,114.19**	34%
Commercial/Industrial	*231.42*	*408.21*	76%
Potential Development			
Added Housing Units	**4,815**	**5,648**	17%
Gross Building SF	**12,077,000**	**15,676,000**	30%
Development Cost	**$2,305,319,000**	**$2,929,650,000**	27%
DIRECT & ECONOMIC MULTIPLIER BENEFITS			
Construction (One-Time)			
Direct Jobs	**11,758**	**14,976**	27%
Direct + Indirect Jobs	**16,814**	21,414	27%
Multiplier	1.43	1.43	-
Direct Payroll	**$793,667,000**	**$1,010,884,000**	27%
Direct + Indirect Payroll	$1,015,893,000	$1,293,933,000	27%
Multiplier	1.28	1.28	-
Direct Revenues	**$2,305,319,000**	**$2,929,650,000**	27%
Direct + Indirect Revenues	$3,158,287,000	$4,013,620,000	27%
Multiplier	1.37	1.37	-
Operations (Annual)			
Direct Jobs	**2,852**	**5,550**	95%
Direct + Indirect Jobs	**3,999**	7,670	92%
Multiplier	1.40	1.38	-1%
Direct Payroll	**$119,741,000**	**$223,044,000**	86%
Direct + Indirect Payroll	$162,623,000	$301,478,000	85%
Multiplier	1.36	1.35	-0%
Direct Revenues	**$478,734,000**	**$862,430,000**	80%
Direct + Indirect Revenues	$649,236,000	$1,171,306,000	80%
Multiplier	1.36	1.36	-
DIRECT TAX EFFECTS			
Construction Revenues			
Sales Tax	$152,579,000	$194,366,000	27%
Real Estate Excise Tax	$35,197,000	$44,491,000	26%
Total One-Time Revenues	**$187,776,000**	**$238,857,000**	27%
Annual Revenues			
Property Tax	$12,404,000	$15,801,000	27%
Sales Tax	$5,864,000	$12,610,000	115%
Real Estate Excise Tax	$4,679,000	$5,847,000	25%
Total Annual Revenues	**$22,947,000**	**$34,258,000**	49%

IV. MARKET ANALYSIS

The first three sections of this report have focus on conditions and opportunities specific to the I-5/179th interchange area. With this section of the report, the analysis lens is widened to cover broader features of the regional market that clearly affect I-5/179th area potentials.

Following this broader look, it is then possible to combine the interchange area and regional perspectives to arrive at an economic development market strategy – provided in the next and final section of this economic feasibility study.

Topics covered by this market analysis include:

- **Comparative demographics** – for Clark County and Washington State
- **Sources of income** – with particular focus on wage and salary income as pivotal to Clark County's economic vitality
- **Labor force and employment** – addressing trends extending from before the Great Recession to the most recent information available (with emphasis on sectors offering the best opportunities for family wage jobs)
- **Committed developments** – setting the pace for recent I-5/119th area investments
- **Industrial land** – as an assessment of county-wide and Discovery Corridor site attributes and challenges
- **A full-service jobs eco-system –** outlining a competitive niche that plays to existing and prospective comparative advantages of this highly accessible interchange area as an employment, residential and entertainment/event hub for Clark County going forward

INFORMATION SOURCES

Information is drawn from a range of readily accessible data sources, including:

- **Federal agency data** – notably from the U.S. Census Bureau, U. S. Bureau of Labor Statistics (BLS) and U. S. Bureau of Economic Analysis (BEA).
- **State agency data** –from the Office of Financial Management (OFM) and the Washington State Employment Security Department (ESD)
- **Local public and non-profit organizations** – including Clark County and the Columbia River Economic Development Council (CREDC)
- **Private data provider** – primarily Environics, a nationally recognized provider of current and trend information (formerly under the auspices of Nielsen/Claritas)

DEMOGRAPHICS

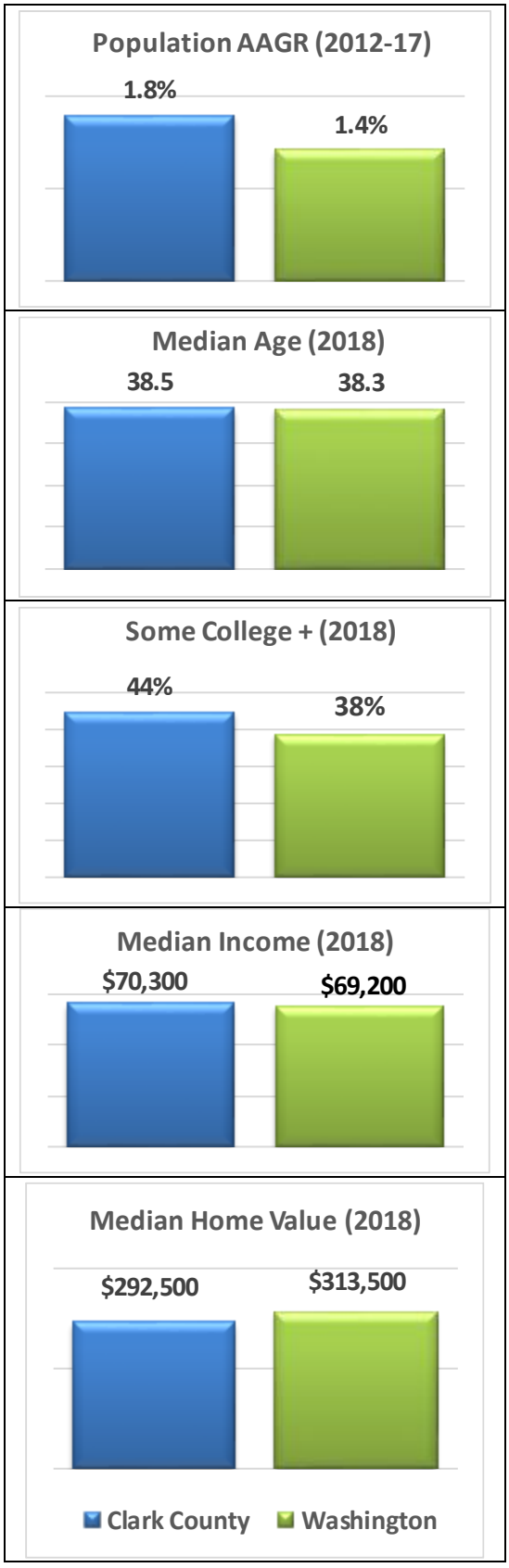
This market analysis begins with a brief review of strategic demographic indicators important for economic growth – all with comparisons between Clark County and Washington state.

Strategic Demographics

As shown by the graphs to the right, Clark County mirrors the state in some ways, but differs in others:

- A key difference is that since 2012, Clark County's **population** is again growing more rapidly than the rest of the state, as indicated by a county-wide average annual growth rate (AAGR) of 1.8% versus 1.4% state-wide.
- At between 38-39 years, the **median age** of Clark County residents is comparable to that of all residents state-wide. However, this median conceals a distribution that is somewhat different. Clark County has a higher proportion of family age adults with children but is under-represented with young adults age 25-34.
- Clark County workers are **well educated** compared to the state. Approximately 44% of adults county-wide (age 25+) have at least some college education or degrees, as compared with 38% across Washington state. Clark County is particularly strong with above average rates of adults with some college, no degree or with an Associate's degree – indicating an extremely well technically trained workforce.
- At $70,300, **median household income** county-wide is somewhat (about 2%) above the statewide median. Clark households are particularly well represented at incomes ranging from $35,000-$150,000 – but under-represented in higher incomes categories of $150,000+.
- **Median home values** are about 7% less than the statewide median. With stronger incomes and lower cost housing, Clark County residents get more for their money – although recent rapid price escalation is creating greater challenges to maintain affordability both locally and throughout the rest of the state.

Taken together, these and other demographic characteristics indicate a county that is family, work and career oriented. The challenge is that too many residents have to commute out-of-county to work.



Source: OFM and Environics

Population Rich - But Jobs Poor

With recovery from the Great Recession of a decade ago, Clark County has benefitted from considerable job growth in in the last several years. But as demonstrated by the chart to the right, this has not been enough to make up for past employment shortfalls relative to Clark County's resident population.

As of 2016, there are only 0.32 jobs located in Clark County for every resident living in Clark County. By comparison, Washington state employment works out to 0.45 jobs per resident.

Jobs-Population Shortfall (2016)

Job Shortfall Factors	Clark County	Washington State
Employment	149,048	3,214,722
Population	461,010	7,183,700
Jobs/Resident	0.32	0.45
Net Deficiency per Resident	0.12	-
Job Shortfall	57,255	-

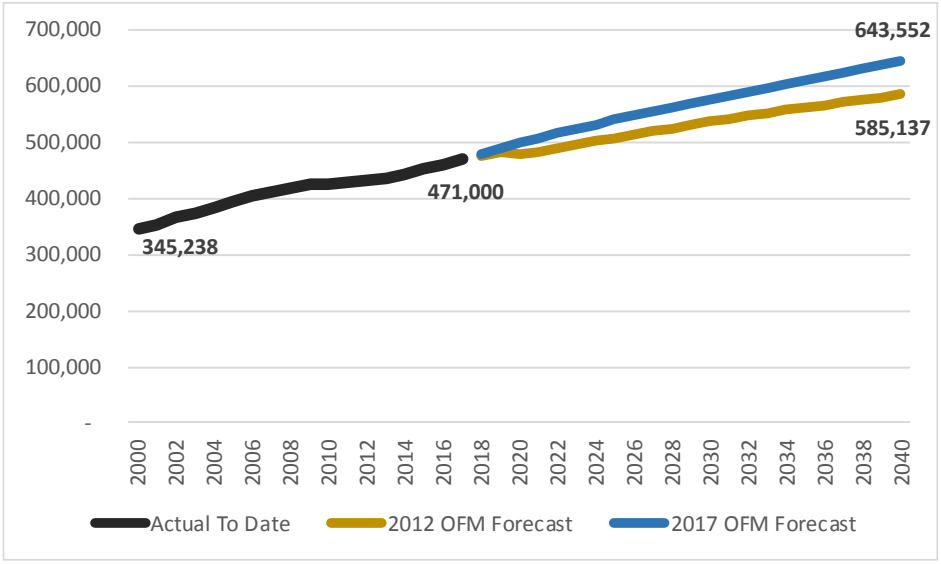
Source: Based on Washington State OFM and ESD data.

The resulting shortfall is an estimated 57,255 jobs. With labor force participation on a par with the rest of the state, this means that a sizable share of in-county residents is commuting out-of-county and out-of-state for employment. The regional ESD economist estimates that about one-third of the county's labor force, over 50,000 workers, commutes to Portland (Oregon) on a daily basis, while only 11,000 commute in the opposite direction (into Clark County)."[10]

Job Needs with Population Growth

As adopted, Clark County's updated Comprehensive Plan has forecast population growth based on a 2012 OFM medium growth forecast. As of late 2017, OFM has released new forecast scenarios (high, medium and low). The adopted and newly released *medium* projections are compared with actual growth since 2000 – as depicted by the graph to the right.

Forecast Population Growth (Medium Scenarios)



Source: Washington State OFM and E. D. Hovee.

From 2010-17, Clark County's population increased at an average rate of 1.84% per year – well above the statewide growth rate of 1.27%. With the currently adopted 2012 OFM medium growth projection, county-wide population growth would slow to a rate averaging just under 1% from 2017-40 – with growth more rapid in the early years of the forecast, then slowing in the out-years closer to 2040. The just-released 2017 provisional forecast would add another 58,400 residents to what was previously projected for Clark County by 2040 – reflecting a 2017-40 growth rate averaging 1.37% per year.

The effects of the population growth forecast for employment are significant. With the earlier 2012 medium forecast, Clark County would need to create close to 113,000 net new jobs. About half of this job need would be to catch-up with the current in-county jobs shortfall and half to serve future added population – assuming that moving toward the statewide average of 0.45 jobs per resident is included as a key planning objective. If the new higher growth alternative suggested by OFM materializes – as consistent with renewed local population growth – the total need could increase to as many as 139,000 added jobs by 2040.

A fundamental premise of this feasibility study is to position the I-5/179th interchange area at the center of action to fulfill the Discovery Corridor vision as a major job engine into the next generation. By no means will this one long-neglected interchange serve as the only or even primary locus for job growth, but it can serve as a useful starting point – due to the area's I-5 corridor accessibility for freight transport and to county-wide/regional labor force.

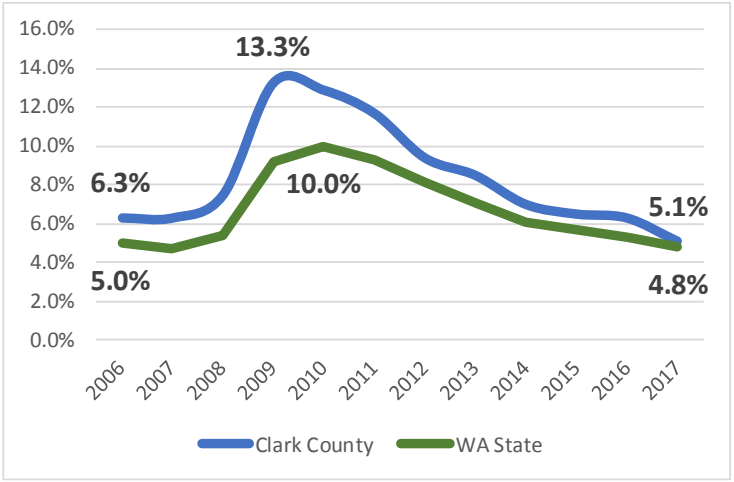
Unemployment

With strong economic performance of the last several years, unemployment is now reaching new lows – even below rates seen to the recession a decade ago. However, the experience of the last recession demonstrated a disproportionate vulnerability to economic downturns.

As of 2017, Clark County's unemployment rate is just 0.3% points above the statewide average. In the last recession, Clark County unemployment rose more quickly and peaked well above the entire state. In 2009, the Clark County rate averaged 13.3% – 4.1% points above the statewide rate of 9.2% (with the state peaking a year later at 10.0%).

The experience of the last recession illustrates a need for improved local job resiliency. This can occur, in part, by having more of the job base that residents depend on located in Clark County.

Unemployment Trend (2006-17)



Source: Washington State ESD.

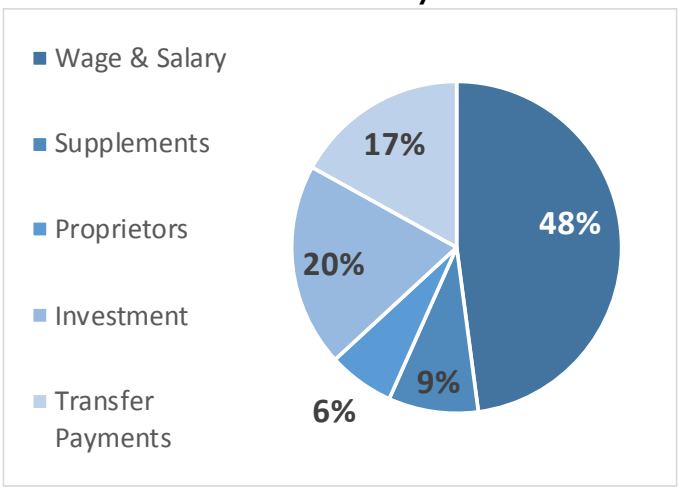
SOURCES OF INCOME

As illustrated by the *pie charts* to the right, there are some important differences in the sources of income for residents of Clark County as compared with all residents throughout Washington state:

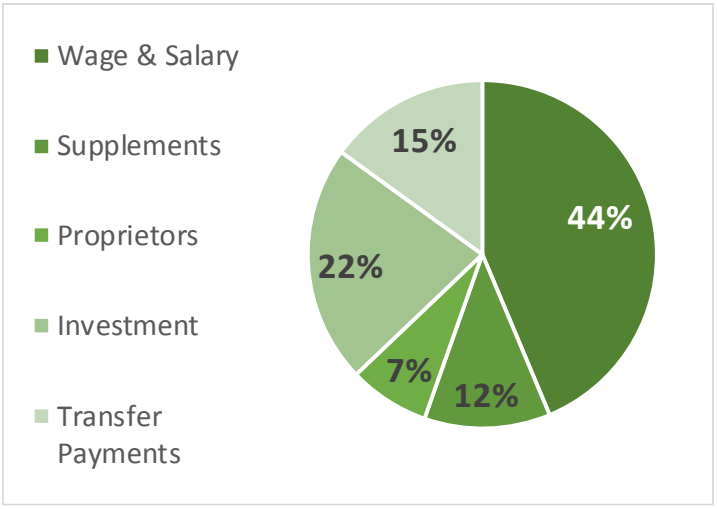
- Taken together**, wages and salaries coupled with transfer payments** (including social security and public assistance) account for nearly two-thirds (65%) of all personal income in Clark County as compared with 59% of personal income statewide. In the last decade, reliance on transfer payments has increased while the proportion of incomes received from wages and salaries has declined – more so in Clark County than is the case statewide.
- Only about 35% of Clark County incomes are derived from **investments, proprietors and wage supplement income** (as retirement contributions) as compared with 41% statewide. Reliance on wage supplements and proprietors (self-employed) income has declined over the last decade, while the proportion coming from investment income has increased somewhat.

Personal Income Distribution (2016)

Clark County



Washington State



Source: U.S. Bureau of Economic Analysis (BEA).

The relatively strong reliance on wage and salary income fits with other demographic information indicating that Clark County is a work-focused community. However, the erosion of this pivotal income wage and salary source in recent years coupled with the rise in transfer payments (from 13% to 17% of total income) in the last decade and the increased costs of commuting out-of-county serve to reinforce the continuing need to increase the emphasis on local job creation.

LABOR FORCE & EMPLOYMENT

As of 2016, Clark County had a resident labor force of close to 220,800 persons. With an in-county employment base of just over 149,000, there is only about two-thirds (2/3) of a job available locally for every person in the labor force – whether employed or looking for work.

Over the last 11 years, Clark County's resident labor force has increased by only 10.4%, below the statewide labor force increase of 12.1%. This is somewhat surprising since population increased more rapidly within Clark County than for the state over the same time frame. In effect, as mobility to jobs elsewhere in the region becomes more challenging with congestion, the lack of local employment appears to be affecting labor force participation more so than in the past.

Employment & Wage Trend

With this overall job need in mind, this feasibility study analysis turns to a more focused review of employment and wage trends in Clark County over the last decade. As shown by the chart on the following page, Washington State Employment Security Department (ESD) data indicates that there were just over 149,000 jobs in over 13,600 firms in Clark County in 2016 – paying an average wage of over $48,850 per year. Additional key observations are summarized as follows:

Employment:

- Government is the largest single employment sector, followed by health care and social assistance. Together, these two sectors account for over 47,000 jobs or close to one-third (32%) of all employment in Clark County.
- Taken together, the primarily industrial sectors of mining, utilities, construction, manufacturing, wholesale trade, transportation and warehousing represent 34,000 jobs or less than one-quarter (23%) of county-wide employment.
- Of the other service-related sectors, retail together with accommodations and food services account for over 30,200 (20%) of the county's job base. All other sectors comprise the remaining 25%.

Job Growth:

- Clark County employment has increased by 15% in the last decade – a positive number as this reflects change occurring since about the peak of the last economic cycle.
- In percentage terms, the most rapid job growth since 2006 is noted for management of companies (up by 148%) followed by healthcare/social assistance and private educational services.
- In numerical terms, by far the most rapid employment growth has occurred with healthcare and social assistance – up by more than 7,000 jobs in 10 years and accounting for 37% of all net job growth in Clark County. Other growing sectors include retail trade (up by 2,900 jobs) and professional and technical services (+2,400 jobs).

- By comparison, there has been virtually no net job growth with industrial activities.

Clark County Employment & Wage Profile (2006-16)

NAICS	Industry Sector	2016 Annual Averages			% Change (2006-16)		
		# of Firms	# of Jobs	Annual Wage	# of Firms	# of Jobs	Annual Wage
Total All Sectors		**13,642**	**149,048**	**$48,852**	**28%**	**15%**	**29%**
11	Agriculture, Forestry, Fishing & Hunting	100	636	$34,653	-19%	-2%	34%
21-22	Mining & Utilities	5	162	$63,812	-67%	-62%	21%
23	Construction	1,670	11,125	$53,040	-1%	-5%	32%
31-33	Manufacturing	470	13,215	$56,387	15%	-3%	20%
42	Wholesale Trade	1,139	6,371	$71,481	28%	22%	27%
44-45	Retail Trade	840	17,816	$30,388	11%	19%	17%
48-49	Transportation & Warehousing	288	3,140	$51,491	22%	-2%	31%
51	Information	198	3,148	$59,741	75%	4%	11%
52	Finance & Insurance	420	4,949	$82,381	4%	25%	61%
53	Real Estate, Rental& Leasing	400	2,568	$46,600	6%	-4%	45%
54	Professional, Scientific & Technical Services	1,446	8,625	$77,898	67%	39%	18%
55	Management of Companies & Enterprises	45	2,060	$97,123	7%	148%	35%
56	Administrative & Waste Services	780	7,623	$37,223	45%	11%	55%
61	Educational Services	160	1,094	$23,892	78%	71%	19%
62	Healthcare & Social Assistance	3,906	22,760	$46,913	466%	45%	17%
71	Arts, Entertainment & Recreation	125	2,334	$21,911	21%	4%	10%
72	Accommodation & Food Services	641	12,428	$18,169	22%	18%	27%
81	Other Services	904	4,679	$37,268	-67%	-10%	76%
92	Government	107	24,316	$55,061	-1%	10%	29%

Notes: NAICS is the acronym for the North American Industry Classification System.

Source: Washington State Employment Security Department (ESD). Employment data is for workers covered by unemployment insurance. Excluded are sole proprietors and others without coverage.

Firm Size:

- Average firm size across all sectors in Clark County is relatively small – at just 11 employees per firm. And with the notable exceptions of retail trade, finance/insurance, firm management, other services and government, average business entity size has generally declined over the last decade. Excluding these exceptions, reduced firm size has occurred as the number of establishments has outpaced job growth.

Wages:

- Across all sectors, the average annual 2016 wage in Clark County was just over $48,850, 17% below the statewide average (strongly influenced by the Puget Sound region).
- The highest wage sector in Clark County is found with management of companies, at over $97,100 per year. Other notable high wage sectors are found with wholesale trade and professional, scientific and technical services – each paying above $70,000 per year.

- Overall, industrial activities pay well – averaging $57,700 per job. Industrial wages are up by 27% in the last ten years, close to the overall gain of 29% across all sectors.
- There can be wide variation within subsectors of an overall industry sector. For example, retail wages average less than $30,400 per year – ranging from a low of $18,600 with service stations to over $50,000 with motor vehicle and parts dealers.
- Wage growth has been strongest in the otherwise shrinking sector of other services – with average wage up by 76% – followed by administrative/waste services (+55%).
- Wage growth has been slowest in arts, entertainment and recreation (up by just 10%), information (+11%), retail trade (+17%) and healthcare/social assistance (+17%).

Statewide Comparison:

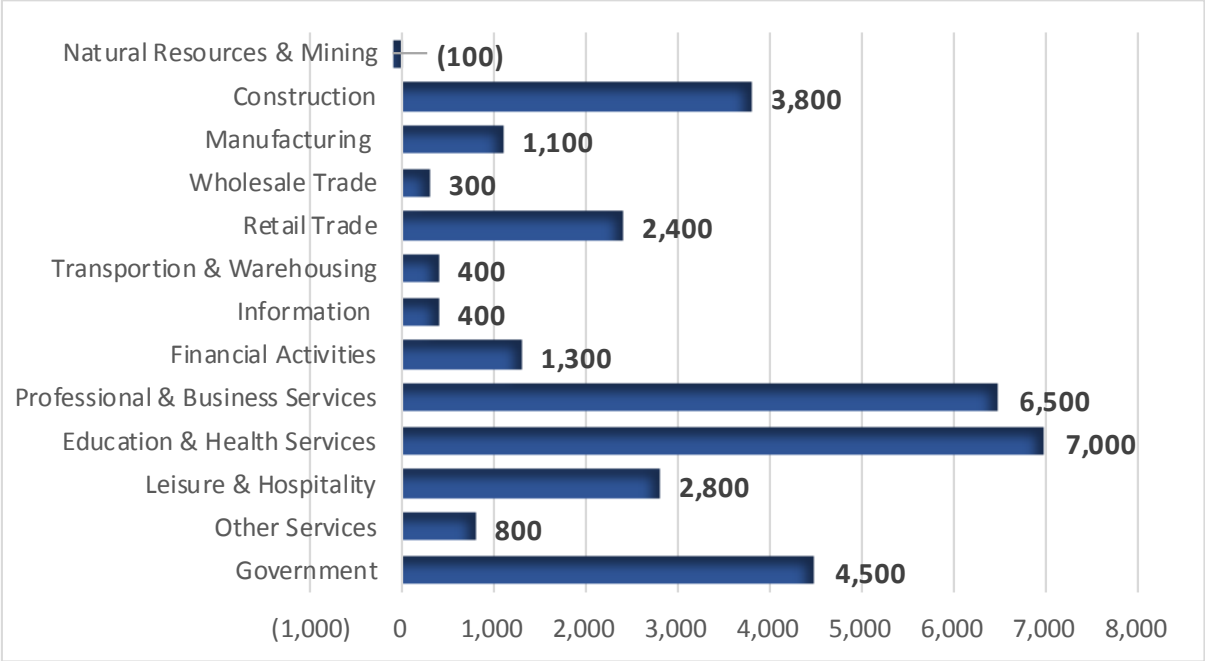
- Two items are noted. First, job gains of 15% in the last decade for Clark County have outpaced the state for which employment increased by 13%. Compared to the state, local job growth has been particularly strong in construction, wholesale trade, retail trade, finance and insurance, professional services, management of firms, educational services, health care and social assistance, and government. Jobs have lagged the state in manufacturing, information, arts/entertainment, and accommodation/food services.
- Second, wages are not only below state-wide averages but have grown more slowly in recent years. Wage growth (in % terms) has been subpar across most sectors – with notable exceptions including finance and insurance, management of companies, administrative/waste services, and transportation/warehousing. Of particular note is that the information sector statewide (concentrated in King County) has experienced rapid job growth and even more rapid wage increases – up by 75% statewide to an annual average of over $159,000 as of 2016. By comparison, the average wage for information workers in Clark County is less than $60,000.

Employment Outlook

ESD provides employment forecasts on a regional multi-county basis. Southwest Washington covers Clark, Cowlitz, and Wahkiakum Counties. Clark County makes up close to 80% of this region's job base. From 2015-25, ESD forecasts that the region will add 31,200 jobs – with an average job growth rate of about 1.5% per year. As shown by the graph on the following page:

- The most rapid employment growth (in numerical terms) is forecast to be with education and health services (up by 7,000 jobs), followed by professional and business services – with professional and business services paying above average wages.
- Taken together, the high paying industrial sectors of natural resources, construction, wholesale trade, transport, warehouse and utilities are forecast to add 5,500 jobs – led by construction and then manufacturing. Within manufacturing, the largest job gains are anticipated with fabricated metals, computer and electronic equipment (up by about 400 and 300 jobs, respectively)
- Government is forecast to add 4,500 jobs – with 73% in public educational services.

Southwest Washington Non-Farm Employment Forecast (Job Growth 2015-25)



Note: ESD forecasts include combinations of some 2-digit NAICS categories. For example, professional and business services includes management of companies as well as professional and related services. Financial activities include real estate together with finance and insurance.

Source: Washington State Employment Security Department (ESD).

CREDC Industry Clusters

As the state-designated Associate Development Organization for Clark County, the Columbia River Economic Development Council (CREDC) updated its 5-year Clark County Comprehensive Economic Development Plan in 2017. The plan is highlighted by the following vision statement:

> Clark County is one of the most inclusive, healthy, and amenity-rich communities in the country. As a result, and with a continued focus on growing a diverse base of community-minded employers, talent (both inside and outside the region) sees greater opportunity here than anywhere else in the country.[11]

The vision recognizes that "the most efficient way to grow the economic base is to support the existing companies by understanding their barriers to growth and supply chain needs." This is to be accomplished by working to "remove barriers and tactically recruit companies with focus on five identified industry clusters:

- Computers and electronics
- Clean tech
- Software
- Metals and machinery
- Life sciences

Each of these industry clusters represents opportunity for the I-5/179th study area as well as for the greater Discovery Corridor – some more readily than others. The study area presents definite opportunity to support and strengthen the life sciences hub that has emerged in the Salmon Creek area – anchored by major employers including WSU-Vancouver, Legacy Salmon Creek Medical Center, and Vancouver Clinic. As available sites in the Salmon Creek become more scarce, the I-5/179th area offers proximity to conveniently reinforce and expand this cluster that is increasingly pivotal to Clark County's economic as well as physical well-being.

While much of Southwest Washington's region's high-tech industry is clustered in east Clark County, the I-5/Discovery Corridor offers opportunity for firms that support high-tech – as with suppliers for whom I-5 transportation access for local and regional distribution. The Discovery Corridor also is well positioned for computer-electronic, clean-tech and software applications that are dependent on or otherwise benefit from the corridor's university research and life science attributes.

And the corridor may be well situated for metals and machinery manufacturing – whether for larger end users that want to own their own sites or for smaller niche players seeking an affordable, accessible industrial or business park location.

Implications for I-5/179th & Discovery Corridor Development

Five overall implications of this employment and business cluster analysis are important for the economic feasibility and vitality of I-5/179th interchange area development:

- While industrial use as traditionally defined remains an important contributor to economic vitality, it should not be relied on as the sole or even primary driver of family wage employment growth. Manufacturing job growth can be encouraged, especially for advanced technology firms. Distribution and construction support services also may play an important role – playing to the strategic advantages of a central I-5 corridor location.
- Added sources of family wage job growth may comprise a mix of professional and business, financial services and the higher wage portions of the education/health sector.
- Lower wage retail, leisure and hospitality and food services also play an important role in providing for a competitive employment center – benefitting from an I-5 location and catering to nearby family wage employers and workers who increasingly want proximity to these services.
- The mix of business activity should accommodate both tightly niched small as well as large employers – recognizing Clark County's shift to smaller firms over time. This mix can be accommodated with a combination of large sites for major corporate and branch facilities together with multi-tenant business parks for a greater diversity of small firms.
- In effect, I-5/179th and Discovery Corridor development offers the best prospect for success *at the intersection* between county-wide/CREDC business cluster opportunities and the corridor's distinctive advantages. This suggests building on the combination of life science and transportation-intensive firms – both large and small – coupled with the ability to draw from a broad, readily accessible labor market in multiple directions.

COMMITTED DEVELOPMENT

Considerable development is already either underway or pending for the I-5/179th Street corridor. Clark County tracks projects that are approved, built or under construction, development agreements (with trips reserved), approved projects in review for land use modifications, and pre-applications.

As of 2017, this listing included the developments as listed by the following chart.

I-5/179th Corridor Current Development Projects (2017)

Project	Type	Quadrant	Status	Comments
Approved Built or Under Construction				
179th Commercial Center	COM	SW	No Activity	Initial phase of development complete
Hawken Building	COM	SW	No Activity	Pre-approved for warehouse/office
Fairground Station	COM	SW	Constructed	Site is partially developed
179th Street Apartments	MFR	SE	Under Construction	
University Estates	SFR	SE	Constructed	
Pioneer Vista Apartments	MFR	SE	Constructed	
Velveteen Meadows Subdivision	SFR	SE	Under Construction	
Green Acres Subdivision	MFR	SE		
Trips Reserved by Development Agreement				
Three Creeks Development	COM/MU	NE/SE	Amendment Proposed	Amendment to include property added on north side of 179th Street
Projects Approved but In Review for Land Use Modification				
Whipple Creek Subdivision	SFR	SE	Approved	
Legacy Place Subdivision	SFR	SE	Approved	
Peach Springs Subdivision	SFR	SE	Approved	
Pre Application				
Evergreen Business Park	COM	SW	No Activity	
179th Street RV Park	COM	SW	In Review	
Elevate Church	INST	NW	No Activity	

Notes: Listing updated as of 2017. Quadrant refers to location to NW, SW, NE or SE of I-5/179th interchange.

Source: Clark County Public Works.

As indicated by the listing, the most active developments underway are residential projects, both single- and multi-family. There is also commercial development planning activity but with less construction to date. Largely missing from the listing to date are industrial projects or other developments with clearly defined family wage potential.

The most significant employment-related project for the 179th corridor currently is the Three Creeks development both south and north of 179th Street just east of the I-5 interchange. The initial property acquired on the south side of 179th Street has been planned for a major retail center. Due to slowing demand from major retail anchor uses and increasing competition with

electronic commerce, development of this south-side site has been slowed pending major tenant commitments.

Approximately 90 acres on the north side of 179th has been purchased more recently – with focus on creating a mixed-use residential and employment center with supportive office-retail development. Due to continued if not increasing strength of the residential market, the northern property is now more likely to serve as the lead development for Three Creeks. Proposed by the developer Killian Pacific is an amendment of the current development agreement to address infrastructure needs with inclusion of the north property.

Three Creeks Development Agreement

Killian Pacific and Clark County entered into a Development Agreement with Clark County for the Three Creeks property in December 2012. Amending the agreement may be considered to include expanded site area and updating of infrastructure planning.

Key features of updated master planning may include:

- ✓ Approximately 107 acres of usable site area – split about evenly north / south
- ✓ 1.8 - 2.1 million square feet of development at build-out
- ✓ 179th North planned for mixed use development – single and multi-family residential together with commercial (likely including a mix of retail, lodging, medical or other office, and/or assisted living)
- ✓ 179th South development focus for convenience and lifestyle plus entertainment uses
- ✓ Phasing starting from north, then south – depending on market opportunity
- ✓ Local arterial access to be re-aligned to reduce intersection conflicts near the interchange – by re-aligning NE 10th to connect with 179th further east (possibly with interim and final phases), and closure of NE Union Road with NE 15th Avenue to become the primary north-south access
- ✓ Proposed removal of Urban Holding (UH) designation from the northern portion of the site based on public-private infrastructure funding program
- ✓ Private funding to include right-of-way control, site studies/technical support, off-site mitigation and pre-paid transportation impact fee (TIF)
- ✓ Public portion of funding to include bonding, local revitalization finance (LRF) and grants (including potential CERB)
- ✓ CERB funding opportunity best for infrastructure to support family wage employment (as with medical, WSU research or tech-related flex/office)

INDUSTRIAL LANDS

Demand for industrial land represents one side of the equation for local and regional economic development. Supply represents the *flip side* – addressing the question of: *Can the needs of the business – for land, buildings, transportation and utility access – be supplied where and when needed?*

In conjunction with its Comprehensive Economic Development Plan, CREDC completed a *Clark County Employment Land Site Readiness* Analysis in November 2016. The purpose of the analysis was to determine the supply and readiness of industrial sites to meet short- and long-term market demand for employment growth county-wide. A related objective has been to compare the land supply to the needs of targeted industries for Clark County.

The study identified 56 potential employment sites of 20+ acres (including site assemblages) throughout the county. Of these sites:

- 17 sites (30%) are in the greater **Discovery Corridor** area extending from north of the I-5/205 Junction to the county line at Woodland – including five sites in or immediately adjacent to the I-5/179th study area.
- Only 15 sites county-wide of the 56 are identified as **Tier 1 properties** that could be development ready within a 6-month time frame – including four sites in the Discovery Corridor but with no sites in the immediate I-5/179th study area indicated as development ready within 6 months.
- Another 29 sites are labeled as **Tier 2** properties that could require 13-30 months to become development ready – including four of the five sites within the I-5/179th study area. One of these sites is situated directly on 179th Street on OR-22 zoned property; one is situated in proximity to the WSU campus at Salmon Creek; the others are located further north toward 219th Street.

Industrial Site Readiness Opportunities & Challenges

As part of its review, CREDC conducted more intensive analysis of five sites county-wide, including **a potential 35-acre assemblage on the 179th Street corridor.**

This site exemplifies features and challenges faced by this as well as other study area potential employment sites:

- ✓ The property is indicated as ideal for corporate heqdquarters use – either single user or multi-tenant
- ✓ Multiple ownerships are involved, requiring parcel assembly for marketability
- ✓ Zoning is for Office-Residential (OR-22) but currently with an Urban Holding-10 (UH-10) Overlay over the entire site
- ✓ Sewer capacity has been improved with a new regional pump station
- ✓ There are wetlands requiring on-site mitigation
- ✓ Road improvements must be in place before development
- ✓ CREDC also identifies amenity build-out at 179th interchange as pivotal to site marketability

- CREDC, *Clark County Employment Site Readiness Analysis,* November 2016

A FULL-SERVICE JOBS ECO-SYSTEM

As is the case nationally, CREDC's Comprehensive Economic Development Plan recognizes the need to go full service – for full amenity value. The first goal of the CREDC plan to expand the existing base with industry clusters is immediately followed by a second and a third goal, to:

- **Support people** – with skilled workforce
- **Create place** – distinctive to each community within Clark County

The post-recession experience makes clear that employers and workers no longer want to be in sterile 9-5 industrial campuses. Rather, successful employment centers increasingly are those that offer great amenity value – both in terms of diverse, readily accessible consumer services and also immediately proximate housing choices.

Retail and service amenity is now clearly recognized as important to attracting and keeping quality workforce. Employees want access to places to shop, eat, recreate and socialize – before, during and after work.

And proximity to diverse, affordable housing has now come to the fore as also being of pivotal importance. This is due in large part to the run-up in housing costs – a phenomenon that has spread beyond major urban centers to include fast-growing western U.S. communities as in Clark County.

Anecdotal accounts and empirical research provide clear evidence of how a weak inventory of housing choices undermines business location decisions and resulting job prospects. A few examples of the types of impacts experienced are highlighted by the sidebar to the right.

To address these market imperatives, the I-5/179th study area is proposed as a **multi-use employment center**. At build-out, the area will feature family wage employers, immediately proximate retail and service businesses, regionally significant entertainment venues, and a diverse mix of single and multi—family housing. True mixed use.

Economic Development & Housing Nexus

"...high housing costs make California a less attractive place to call home, making it more difficult for companies to hire and retain qualified employees, likely preventing the state's economy from meeting its full potential."

- Alejandro Lazo "California's Housing Costs Hurt Economy, Increase Poverty, Report Finds," *Wall Street Journal,* March 17, 2015.

"... a lack of affordable housing makes it more difficult to recruit and retain employees. In addition, to the extent that an affordable housing shortage forces workers to "drive 'til they qualify," a region may be faced with congested roads, which can reduce economic competitiveness.

- Keith Wardrip, et al, "The Role of Affordable Housing in Creating Jobs and Stimulating Local Economic Development," Center for Housing Policy, January 2011.

"Cities with less-affordable housing tend to experience slower employment growth, because land rents are so high that the supply of land must have reached some limit. These land supply limits are the ultimate restrictions on local employment growth."

- Ritashree Chakrabarti and Junfu Zhang, *Unaffordable Housing and Local Employment Growth*, Federal Reserve Bank of Boston, 2010.

V. MARKET STRATEGY

Building from the knowledge of the foregoing I-5/179th interchange area and market analyses, this market strategy starts with a 10-point concept. This is followed by identification of activity clusters, economic feasibility, partnership opportunities, marketing plan, economic outcomes and a summary action agenda.

THE CONCEPT

A series of 10 observations emerge from the combination of the quantitative and qualitative analyses – including stakeholder interviews – completed for this feasibility study:

1) **There is substantial but as yet unrealized economic development potential for the I-5 corridor extending north to the Clark County line.** Of 56 sites identified by CREDC as employment lands of 20+ acres, 17 sites are located in what has been described as the Discovery Corridor, extending from the I-5/205 junction north past La Center to the county line. Within the portion of the corridor extending from the I-5/205 confluence north to the 219th interchange (and centered at 179th), there is capacity for at least 5,550 added jobs dependent on infrastructure. Creating family wage jobs at sites proximate to this I-5 travel corridor also offers convenient opportunity to reduce the unneeded outflow of Clark County commuters to the Oregon side of the Columbia River.

2) **The Discovery Corridor appears to a potentially powerful marketing concept but with no clear strategic plan for multi-year, multi-jurisdiction implementation.** As this I-5/179th study makes clear – there appear to be two distinct segments to the Discovery Corridor Concept – a southern 134th to Battle Ground interchange segment with 179th at the center and a northern Battle Ground to La Center segment. Each is associated with a distinctive mix of target industry (or business cluster) opportunities.

3) **Targeted economic development opportunities need to be clearly defined.** A broad strategy for each interchange area might be sketched out as follows (from south to north):
   - **134th/139th –** Higher education (WSU), medical, local service-commercial (but closer to build-out capacity than the other interchanges)
   - **179th –** entertainment/recreation complex, commercial/mixed use hub, I-5 visible business park/office campus and supporting residential (with mid-range home values)
   - **219th –** a swing interchange with development more future-oriented pending UGA inclusion and possible extension of the interchange for west-side access.
   - **Ridgefield –** ideal for large site industrial including warehouse-distribution with ready access to Puget Sound and Portland/Vancouver markets, coupled with prospective Clark College and Peace Health expansions
   - **La Center** – anchored by casino driven entertainment with regional destination lodging and retail anticipated together with longer term east-side industrial potential

With the exception of the Clark County fairgrounds/amphitheater complex, the **179th interchange** does not yet have a clearly identified business development identity. The most market-ready uses currently are residential, commercial retail-service and possible mixed-use development. Corporate office development is a longer-term opportunity.

While there is light industrial and business park zoning, it is located away from the interchange, parcels are often fragmented and relatively small, and there appears to be minimal industrial development interest to date (with the possible exception of NE Delfel/10th Avenue most proximate to the fairgrounds).

Non-retail employment-focused development will rely not on any single economic driver, but rather will come from a multiplicity of sources – possibly including spinoff from nearby medical and higher education centers. The commonalities will be firms reliant on I-5 visibility and access, with a possible emphasis on incremental business park development oriented to smaller locally owned business uses – as with the Eastridge Business Park north of Orchards. Clark County has a lack of privately owned multi-tenant business parks compared to the rest of the metro region; I-5/179th could be a good location to fill this gap.

4) **Environmental and infrastructure issues – particularly transportation – represent added costs to be addressed in a manner that will render pivotal economic development sites as locally and regionally competitive.** Priority investments appear to be I-5 interchange reconstruction, 179th Street improvement, and north-south connector roads including NE 10th and 15th (in rough priority order). A major need is to establish full north-south connectivity parallel to and on both sides of I-5 extending from 134th to 199th/219th for improved internal circulation – especially service to industrial and business park designated properties. This is complicated because the northern portions of these corridors are outside current UGA boundaries and cannot readily be improved to urban arterial standards.

5) **If infrastructure and environmental constraints can be proactively addressed, the mix of business-industrial, commercial, entertainment, and residential choices fit well with resident and business preferences – as a distinctive competitive advantage going forward.** Put simply, there is no other location in Clark County that can concurrently "check the boxes" of I-5 access/visibility, vacant buildable land, and a mix of residential, commercial and industrial/flex choices so convenient to urban populations of southwest Washington.

6) **Leveraging community, political and funding support requires sustained focus to generate family wage jobs for Clark County residents.** Since before the Great Recession, much of the public discussion and economic development emphasis for this interchange has been on the Three Creeks development on the south side of 179th with a primarily retail orientation. While there can be exceptions, a challenge with retail and associated dining/entertainment uses is a relatively lower wage profile which does not as directly address county economic development priorities. Also noted is that retail is not an eligible use for CERB infrastructure funding, and residential is not favored either.

To package a competitive and successful CERB application, Clark County will need to demonstrate a primary focus on creating jobs that pay above the Clark County median wage. The best case will likely involve an infrastructure project demonstrated to directly create higher wage industrial, professional office, medical, educational, R&D or some combination of similar uses.

Based on current zoning, this will most likely occur on industrial or business park property located either north or south of the 179th corridor. In other words, as a job-creating adjunct to core I-5 interchange / 179th improvements. If a substantial family wage office use were to be developed on more proximate commercial property (as with Three Creeks north of 179th), this could also serve as rationale for CERB-related investment – as with a new road/bridge connector from about NE 15th Avenue at 179th) back to 10th Avenue.

7) **Business cluster targeting also is important to make the case for state, local and private sector investment leveraging.** CERB and other economic development funding sources will want to see a clear delineation of family wage job industry for which there the area is or will be competitive. Better yet, CERB would prefer to have an up-front *bird-in-hand* commitment from a lead investment or family wage employer ready to build, contingent only on the CERB investment. So in rough order of priority, the options would be to:

   - Secure a major user with family wage profile (which could mean waiting to apply for CERB until this anchor user is identified)
   - Obtain developer commitment to build the first phase of a multi-phase business park/office campus (with or without anchor tenants but targeting a family wage tenant profile)
   - Submit for CERB without any user/development commitment but with market analysis demonstrating strong demand (a tougher sell, especially at a location for which there has been limited family wage industrial or office user experience to date).
   - Whichever path is chosen, it is also worthwhile to make the case for strong linkages to nearby residential, retail-service and entertainment options – as this is increasingly important to employer location decisions (especially to attract younger millennial workforce that is currently under-represented in the Clark County demographic mix).

8) **Public-private partnership (P3) provides the best opportunity to create and sustain market-ready development offering compelling return on investment.** One variation on the P3 model has been demonstrated with fairgrounds/amphitheater development – notably the partnership with Quincunx. Another variation is anticipated to occur with the Three Creeks commercial and mixed use development now being planned for the opposite side of the interchange.

   More partnerships with development agreements are likely needed. If CERB funds are to be brought to the table, a P3 arrangement is suggested for business park/office campus development – perhaps just beyond the commercially designated 179th corridor.

9) **Economic development marketing and coordinated implementation depends on identification of a lead organization together with committed multi-jurisdiction and private supporting roles.** At this time, there would appear to be two primary options for this lead role – Clark County or CREDC. Supporting roles (including leads on some project components) may be appropriate for public agencies including WSDOT, the Columbia Regional Wastewater District (CRWWD), Clark County Events Center at the Fairgrounds, and private participants (particularly via development agreements) – extending to other players including WSU Vancouver, the Port of Ridgefield and Cities of Vancouver, Battle Ground, Ridgefield, and La Center.

10) **Successful I-5/179th interchange area development can best be realized under the umbrella of a 20+ year flexible, cooperative Discovery Corridor strategic plan.** A recurrent theme expressed by stakeholders interviewed as part of this feasibility study has been for the development of a single cohesive, comprehensive, multi-jurisdictional Discovery Corridor strategic plan. The Port of Ridgefield is credited with creating the concept. Now there is need for clearly articulated geographic, programmatic and land use definition. While the plan could be created on a contractual basis, the jurisdictional lead role would appear to best fit Clark County in cooperation with the other entities noted above.

Family Wage Jobs For Clark County

The **2004-2024 Clark County Comprehensive Plan** defined a "family wage job" as a job which pays a combined amount at or above the average wage for Clark County plus an added 25% for benefits. The more recent **20-Year Comprehensive Growth Management Plan 2015-2035** places continued emphasis on family wage jobs for economic development

A framework plan policy is stated to: "Encourage businesses which pay a family wage to locate in Clark County." (Policy 9.1.3)

A 20-year planning policy for the unincorporated county is to: "Provide priority assistance to employers who pay a family wage. (Policy 9.2.4)

Included as an implementation strategy with the plan's transportation element is a priority to "allocate or reserve corridor capacity for land uses likely to produce family wage jobs."

A Washington state CERB program requirement is to fund projects resulting in an hourly wage that pays above the county-wide median. CERB also prioritizes projects with clear specification of employee benefits.

While not defined precisely the same, the terms "family wage job" and "above median wage" employment are used interchangeably in this feasibility report.

ACTIVITY CLUSTERS

The question now is: *What are the best, most marketable employment uses for development of the I-5/179th full study area?*

At first glance, I-5/179th might be considered as a *blank slate* from an economic development perspective. Compared to other freeway interchanges in Clark County, much of the area visible from the I-5 freeway appears as undeveloped or underutilized.

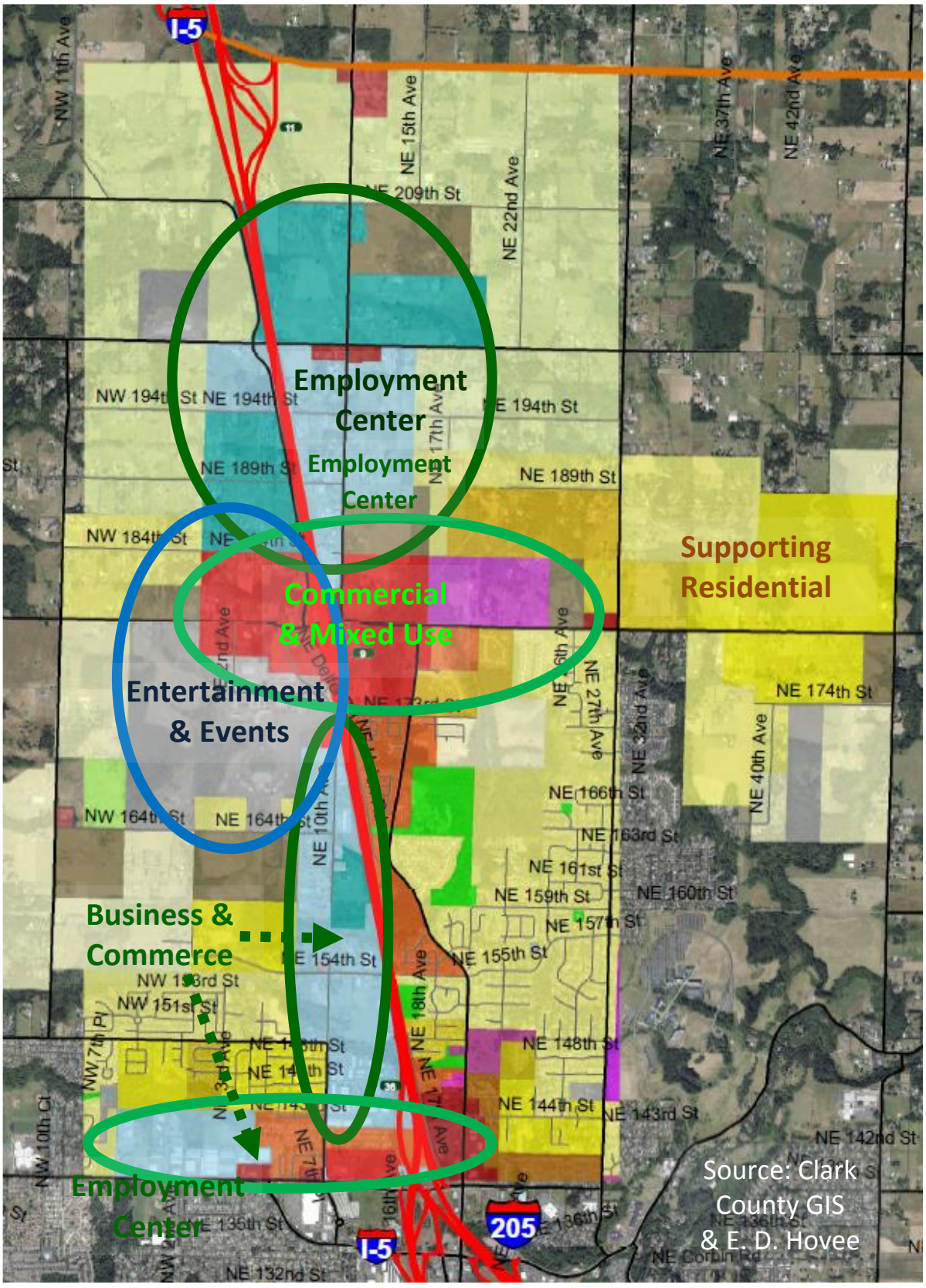
However, despite first impressions, there appear to be some definite opportunities – some clear direction going forward. The path of future development will be shaped by the freeway and interchange, the existing pattern of uses and zoning, and by development interests prepared to make major investments.

Taken together, existing conditions and expectations begin to narrow the range of realistically achievable opportunities. Going from north to south (as illustrated by the map on the next page), five key **activity clusters** are associated with a suggested economic development concept:

- **Employment center** – as the largest repository of light industrial/business park land and best long-term opportunity for family wage employment creation – situated between 179th and 209th and as yet awaiting a lead investment (as a targeted use for CERB or other economic development related funding support).
- **Commercial & mixed use** – most likely the most immediate economic catalyst development – anchored by Three Creeks right at the interchange – but with opportunity for major office campus at the eastern end and hospitality/entertainment at the western end of the 179th corridor.
- **Entertainment & events** – anchored by the fairgrounds/amphitheater complex with long-term economic development potential tied to improved access and increased year-round utilization including supporting lodging and related hospitality investments.
- **Business & commerce** – clustered along a newly improved NE 10th Avenue corridor with a southern T-axis supported by the 134th/139th Street corridors and associated I-5 Interchange improvement – attractive for local serving light industrial and service businesses, many at the mid-upper end of the employment wage range.
- **Surrounding residential** – encompassing the economic clusters on all sides – with a mix of single-family, multi-family and recreational use opportunities – ideally oriented to support the emerging business and employment core clusters.

Not directly a part of the I-5/179th area but closely affiliated is the WSU university and medical cluster situated just beyond the southeast edge of the study area. Also noted is the longer-term opportunity for extension of the Discovery Corridor employment center north to the 219th/Battle Ground interchange pending future UGA decisions.

Activity Clusters for an I-5/179th Corridor Full Service Jobs Eco-System



ECONOMIC FEASIBILITY

The economic feasibility of future development planned for the I-5/179th study area can be assessed on two levels:

- **Project-by-project** – which is beyond the scope of this study but will be assessed by each owner or proponent based on the merits of the types of investment being considered (as summarized by the side-bar to the right).
- **Build-out of the UGA portion of the 5,300 acre study area** – the focus of this feasibility report.

Economic feasibility for build-out of the 1-5/179th study area as a **full-service jobs eco-system** appears to be eminently achievable – conditioned primarily on the ability to fund and re-build the 179th interchange and on associated local road network improvements. Of great importance to the viability of a family wage Employment Center is the development of a local north-south road network reaching from 179th north to the 219th/Battle Ground interchange. Mechanisms to encourage parcel assembly of smaller sites should also be considered.

The NE 10th Avenue improvements underway will greatly improve access to local business and commerce development opportunities south of the fairgrounds. Similarly, **NE 15th/10th Avenue** improvements on the east side of I-5 from 179th north will prove instrumental to realization of the interchange's best opportunity for a family wage industrial and business park employment center as well as for a commercial and mixed use center.

If successful, the **public-private partnership (P3)** approach to development agreements currently being refined for the commercial and mixed-use area on 179th can serve as a model for other similar joint investment opportunities – especially for the northern Employment Center and future potential fairgrounds/event center intensification.

And the feasibility of I-5/179th area development is best served if conducted as a **multi-jurisdictional, cooperative** effort involving all five Discovery Corridor interchanges.

Project-Based Feasibility

Factors pivotal for project feasibility likely vary by activity cluster as follows:

- ✓ **Employment Center** project feasibility may be determined on a user basis for an adequately sized build-to-suit site or as a multi-tenant real estate investment based on rental income returns to invested capital.
- ✓ **Commercial & Mixed-Use** feasibility is most likely assessed as a multi-tenant real estate development opportunity – with more development and financing sophistication required for mixed use than single use projects.
- ✓ **Entertainment & Events** feasibility will be driven by decisions of the Clark County Events Center, with supporting private hospitality investment driven by opportunity for year-round utilization.
- ✓ **Business & Commerce** feasibility is assessed similar to that of employment center uses, but focused more on local, smaller scale owner and multi-tenant development.
- ✓ **Supporting Residential –** is driven by local owner and developer opportunity for quick absorption of each project or phase.

PARTNERSHIP OPPORTUNITIES

In conducting this economic feasibility study, interview contacts were made with key area stakeholders including developers and their legal representatives as well as with neighborhood and fairgrounds interests. A broader regional perspective was obtained via discussions with organizations including the Regional Transportation Council (RTC), Washington State Department of Transportation, and the Columbia River Economic Development Council (CREDC).

This network of contacts and supporting organizations will need to be further widened, especially to the extent that the jurisdictional interests of all five Discovery Corridor interchanges can be brought to the table. In addition to private sector and project-specific partnership opportunities, these additional institutional and public sector partners can be expected to include:

- City of Vancouver, WSU and major health care providers (134th/139th interchange)
- Cities of Battle Ground and Ridgefield (219th interchange)
- City and Port of Ridgefield (269th interchange)
- City of LaCenter and ilaini/Cowlitz tribal interests (319th interchange)

MARKETING I-5/179 & DISCOVERY CORRIDOR

As funder of this economic feasibility study, CERB asks for "identification of the group responsible for implementing the marketing strategy" on behalf of the affected project area. Also requested is information regarding the group's capacity to complete this responsibility.

As discussed with the study area development concept, the jurisdictional lead role for coordinating and marketing the I-5/179th full-service jobs center would appear to best fit Clark County in cooperation with other public jurisdictions and public/private development partners.

Determination of roles and responsibilities for coordinated marketing of the greater Discovery Corridor's set of five interchange areas is not as straightforward. What is most important – at least in the early going – is the identification of an entity that can best serve as inter-jurisdictional convener.

Due to its jurisdictional responsibilities that extend across all five interchanges, Clark County is suggested as an appropriate convener – especially for purposes of preparing a multi-jurisdictional strategic plan. Project implementation lead and support roles would then vary depending on the interchange area under consideration, project requirements, and specific jurisdictional responsibilities.

Conceptually, key participants and responsibilities can be outlined– on a preliminary basis – as outlined by the matrix chart on the following page.

I-5/179th and Discovery Corridor Marketing Roles / Responsibilities (Conceptual)

Function	Lead Role	Support Roles
I-5/179th Study Area		
Property Owner & Developer Coordination	Clark County	WSDOT, property owners and development interests
Infrastructure Planning & Implementation	Clark County and WSDOT	Property owners, developers and public agency funders
Business Development & Recruitment	CREDC	Property owners, developers and Clark County
Full Discovery Corridor		
Strategic Plan	Clark County	All participating jurisdictions, business and civic representatives
Infrastructure Planning & Implementation	Depends on interchange and jurisdictional responsibility	All participating jurisdictions, business and civic representatives
Business Development & Recruitment	CREDC	Property owners, developers, cities, Port, utility providers and Clark County

Source: E. D. Hovee. This matrix chart is preliminary and subject to revision.

ECONOMIC OUTCOMES

As detailed in Section III of this report, economic outcomes anticipated with full **build-out** of the I-5/179th interchange study area are currently projected to include:

- **5,550 direct jobs** – covering industrial, commercial, and entertainment sectors important to Clark County's economic vitality
- **5,650 housing units** – as a mix of single attached/detached and multi-family workforce housing in support of the Discovery Corridor employment center.
- **$234 million in one-time construction plus $34 million per year in subsequent on-going tax revenues** – to benefited state and local jurisdictions.
- **Achieving an above median wage** – in excess of the approximately $20 per hour current county-wide median.

Metrics for Monitoring

Datasets that should be available consistent with the study area boundaries of the I-5/179th interchange area include:

- Square footage of new building space – for employment, residential and other uses
- Study area employment and wages
- Assessed valuation – by use type
- Property tax and REET revenues
- Sales tax revenues (for properties within the LRF)

In the event that CERB funding is secured for a specific project area, Clark County should be prepared to establish protocols for compilation of similar information for the specific development(s) benefited. This may involve agreements with directly benefited property owners to provide outcome metrics – including payroll and employee benefits information in a manner as may be mutually determined.

Tracking Outcomes

Monitoring progress toward planned outcomes is important for compliance with CERB funding requirements. Outcome measures also are useful to track for Clark County and project partners. If performance (on a cumulative basis) is below expectations, policy and incentive options that might be useful for improving performance can be considered and implemented.

In the event of CERB capital funding, Clark County is prepared to establish protocols that include designation of a County department with the overall responsibility for data collection and management. This approach could include interagency agreements involving Clark County and the State of Washington for datasets that are within their respective purviews.

Data compilation is proposed to occur consistent with agency reporting cycles on an annual basis. The term of the data collection process is proposed to be for a period of not to exceed 10 years or as otherwise may be mutually agreed with the State of Washington / CERB program.

Anticipated data collection responsibilities are outlined as follows:

- **Clark County Auditor or Treasurer's Office** – sales tax and REET revenues (tracked in a manner similar to what as currently maintained for the LRF)
- **Clark County Assessor/GIS** – building square footage, valuation of new construction and property taxes – by employment, residential and other use.
- **State of Washington Employment Security Department (ESD)** – average and median wage for all work district employment (subject to confidentiality requirements)
- **U. S. Census On-The-Map** – for employment and payroll estimates, if not available from other sources.

ESD data is proposed to be provided in the form of median hourly pay. This data is not currently available except on a county-level for all job sectors combined but not for specific NAICS industrial sectors. However, data regarding average annual wages is currently a part of the normal ESD county-level reporting format.

A consistently applied data collection process for a customized geography that is a sub-portion of the County depends on reaching protocols early on as to: the department of the County with overall coordinating or reporting responsibility, agreements with participating county and state agencies, and agreement as to the reporting period (annually or otherwise) together with a clear understanding of the duration of the monitoring activity.

ACTION AGENDA

Because there is no project specific application anticipated in the near term, the action agenda outlined below is more generalized – but also potentially more far-reaching. Three **action steps** are proposed for Clark County consideration:

I-5/179th and Discovery Corridor Marketing Roles/Responsibilities (Conceptual)

Action Step	Comments	Time Frame
1) Proceed with ready-to-build public-private partnership (P3) projects	Finalize development agreements; include lifting of the Urban Holding (UH) overlay to the extent supported by public-private committed infrastructure capacity and with reasonable return on investment for public and private participants	**Starting this year** (2018)
2) Recruit for the best available privately developed and CERB-supported capital funding proposal	Focus to be on securing a commitment from a clearly identified above median wage employer (either as sole site owner or as anchor tenant to a multi-use development) – with CERB or other similar economic development funding incentives	**Next 2-3 years** (2019-20)
3) Prepare a cooperative, multi-jurisdictional 20-year Discovery Corridor strategic plan	To encompass the five I-5 interchange areas extending from the I-5/I-205 junction to the north Clark County line with involvement of all directly affected state and local jurisdictions and with broad-based private sector and civic participation	**In 3-5 years** (2020-22)

Source: E. D. Hovee. This matrix chart is preliminary and subject to revision.

These three action steps might be considered independently – with or without action on the full agenda. However, the long-term economic impact – for jobs, wages and tax base – is maximized if the full 3-step agenda is actively pursued:

- Proceeding with ready-to-build **public-private partnerships** builds momentum for further investment – starting on 179th Street in closest proximity to the interchange.
- Active recruitment of a **family wage employer** is pivotal to extending development interest beyond the current market for mixed use residential and commercial – by bringing additional infrastructure resources and possible land assembly assistance to the table in what can be a *win-win* for a significant employer and infrastructure providers.
- And implementing a cooperative **Discovery Corridor strategy** may be the best if not only way to better leverage current piece-meal initiatives, creating a jobs center that truly can make a dent in providing more jobs for Clark County residents in their home community.

APPENDIX A. PREPARER PROFILE

This economic feasibility study for the I-5/179th interchange study area has been prepared for Clark County by E. D. Hovee & Company, LLC. Since 1984, E. D. Hovee has provided economic and development consulting services for a wide range of public agency, non-profit and private clients – primarily in the Pacific Northwest states of Washington and Oregon.

As a specialized professional consulting practice, the firm's focus is on assessing market and financial feasibility, economic impacts and business development strategies for major public and private capital investment projects.

Based in Vancouver, EDH has extensive experience with projects locally and regionally – with clients including Clark County, most of the cities, all three port districts, and non-profit development organizations such as CREDC, Identity Clark County, and the Fort Vancouver National Trust. EDH has also worked with a wide range of private clients – including property owners and real estate development firms.

EDH has completed a range of economic feasibility studies addressing CERB requirements:

- CERB/LIFT tax benefits analysis for a regional retail center and business park in proximity to I-5 and NE 179thStreet on behalf of Killian-Pacific.
- Port Townsend's Howard Street Corridor economic feasibility for a $7 million street and utility extension (with $1.5 million funded by CERB) – providing the first fully-served, shovel-ready industrial land in Port Townsend as a work district marketed to both entrepreneurial and established firms as a place where "we speak craft."
- Skagit Manufacturing Feasibility study – leading to the successful marketing and reuse of a former steel manufacturing firm in Sedro-Woolley for industrial incubator space.
- Health care industry assessment for the Lake Chelan valley area in north central Washington – both with and without a new hospital facility.
- Feasibility study leading to Public Works Trust Funding of sewer improvements to serve industrial and commercial development on Tennant Way in Longview.
- Economic feasibility study leading to CERB funding for infrastructure to serve a 42-acre business park in Skamania County.

The firm is currently engaged in CERB-funded feasibility studies as lead consultant for the 55-acre Bell Creek Economic Opportunity Area in Sequim on the Olympic Peninsula in Clallam County and as sub-consultant for the 4,000-acre Arlington-Marysville Manufacturing Industrial Center in Snohomish County.

APPENDIX B. PRIOR AREA ANALYSIS

In August 2015, an *Economic Impact and Return on Investment Analysis for NE 179th Street Improvements* report was prepared by Johnson Economics for area property interests involved with planned developments for the I-5/179th interchange area. As detailed by the chart to the right, the Johnson Economics analysis yielded higher estimates of potential economic impact than estimated with this 2018 economic feasibility report prepared by E. D. Hovee. Key differences include the following:

- The study area defined by Clark County for the 2017-18 E. D. Hovee analysis extended further south and west but did not encompass as much land to the east as considered by Johnson Economics.
- Johnson's area included about 650 more vacant acres than E. D. Hovee.
- More pivotally, the Johnson analysis resulted in an estimate of developable land area of 4,100 acres, 3.7 times the developable acreage figure of E. D. Hovee analysis as provided by the Clark County Vacant Buildable Lands Model (VBLM).

Comparison of Economic Impacts

Description	Johnson Economics	E. D. Hovee
DEVELOPMENT PROGRAM		
Land Area (Acres)		
Vacant Land Area	2,192.20	1,541.10
Developable Land Area	4,100.10	1,114.19
Commercial/Industrial	768.80	408.21
Potential Development		
Added Housing Units	24,105	5,648
Gross Building SF	50,782,145	15,676,000
Development Cost	$7,317,290,600	$2,929,650,000
DIRECT & ECONOMIC MULTIPLIER BENEFITS		
Construction (One-Time)		
Direct Jobs	54,357	14,976
All Jobs (w/Multiplier)	84,933	21,414
Direct Payroll	$3,009,590,003	$1,010,884,000
All Payroll (w/Multiplier)	$4,237,357,279	$1,293,933,000
Direct Revenues	$7,317,293,688	$2,929,650,000
All Revenues (w/Multiplier)	$11,235,622,720	$4,013,620,000
Operations (Annual)		
Direct Jobs	23,728	5,550
All Jobs (w/Multiplier)	30,502	7,670
Direct Payroll	$698,520,728	$223,044,000
All Payroll (w/Multiplier)	$959,723,222	$301,478,000
Direct Revenues	$1,368,961,248	$862,430,000
All Revenues (w/Multiplier)	$2,164,635,778	$1,171,306,000
DIRECT TAX EFFECTS		
Construction Revenues		
Sales Tax	$629,286,992	$194,366,000
Real Estate Excise Tax	NA	$44,491,000
Total One-Time Revenues	$629,286,992	$238,857,000
Annual Revenues		
Property Tax	$85,362,049	$15,801,000
Sales Tax	$41,667,000	$12,610,000
Real Estate Excise Tax	NA	$5,847,000
Total Annual Revenues	$127,029,049	$34,258,000

Sources: Johnson Economics & E. D. Hovee, as described.

Two primary factors account for the difference in developable land estimates. *First,* the Johnson analysis does not appear to have excluded critical lands which the VBLM indicates as affecting close to half of all land area in the full study area – and the majority of otherwise vacant land that might be considered for added residential or employment purposes.

Second, the Johnson analysis includes a more encompassing estimate of redevelopable land than is associated with the VBLM which serves as a basis for Clark County's growth management planning. The Johnson analysis defined redevelopment lands based on valuation of current improvements "at 50% of average in study area or below." As a result, redevelopment sites account for close to one-half (47%) of the total developable land acreage assumed with the Johnson report.

In contrast, the Clark County VBLM defines under-improved properties as including residential sites of up to $13,000 assessed valuation of building improvements on a residentially zoned parcel or up to $67,500 for a commercially or industrially zoned property. This results in a more conservative estimate of redevelopment potential on already developed properties.

Differences in developable land estimates account for most of the differences in economic impacts estimated by the Johnson Economics report and this current economic feasibility study. Depending on the output metric considered, Johnson impact estimates range 2-4 times higher than impacts estimated by E. D. Hovee.

Other less significant differences noted between the two analyses include:

- Johnson used FAR estimates as a basis for estimating residential development; the E. D. Hovee analysis is based on average Clark County VBLM unit per acre estimates.
- For commercial and industrial space, Johnson applied FAR ratios of 0.24 and 0.31 respectively; E. D. Hovee applied VBLM employment density factors of 9 and 20 employees per acre factors together with typical employee square footage space requirements to arrive at somewhat lower imputed FAR ratios of 0.16-0.26 which may be more typical at lower density suburban locations.
- Economic multipliers were the same to somewhat higher than those utilized by E. D. Hovee – with both firms drawing from the IMPLAN input-output model. E. D. Hovee estimates are limited to Clark County.
- Johnson includes estimates of income associated with households that would locate in new homes built in the area. The E. D. Hovee analysis is limited to economic effects associated with new employment within the I-5/179th study area.
- The E. D. Hovee analysis includes fiscal benefits to the state and Clark County associated with Real Estate Excise Tax (REET) with property sale and subsequent periodic re-sale which is not included with the Johnson Economics report.

APPENDIX C. SUPPLEMENTAL DATA

Supplemental data for this I-5/179th interchange area Economic Feasibility Study provided with this appendix covers:

- Comparative Population Trends
- Comparative Unemployment & Labor Force Trends
- Comparative Median & Average Wage Trends

Comparative Population Trends (2000-17)

Year	Population		% Change from Prior Year	
	Clark County	Washington State	Clark County	Washington State
2000	345,238	5,894,143	--	--
2001	352,715	5,970,452	2.2%	1.3%
2002	364,855	6,059,698	3.4%	1.5%
2003	374,091	6,126,917	2.5%	1.1%
2004	385,370	6,208,532	3.0%	1.3%
2005	394,600	6,298,797	2.4%	1.5%
2006	404,737	6,420,219	2.6%	1.9%
2007	412,692	6,525,121	2.0%	1.6%
2008	419,091	6,608,234	1.6%	1.3%
2009	423,775	6,672,263	1.1%	1.0%
2010	425,363	6,724,540	0.4%	0.8%
2011	428,000	6,767,900	0.6%	0.6%
2012	431,250	6,817,770	0.8%	0.7%
2013	435,500	6,882,400	1.0%	0.9%
2014	442,800	6,968,170	1.7%	1.2%
2015	451,820	7,061,410	2.0%	1.3%
2016	461,010	7,183,700	2.0%	1.7%
2017	471,000	7,310,300	2.2%	1.8%
Annual Average Growth Rate (AAGR):				
2000-17			1.8%	1.3%
2006-17			1.4%	1.2%
2012-17			1.8%	1.4%

Sources: U. S. Census, OFM.

Comparative Unemployment & Labor Force Trends (2006-17)

Year	Labor Force		Unemployment Rate	
	Clark County	Washington State	Clark County	Washington State
2006	205,896	3,323,938	6.3%	5.0%
2007	209,985	3,403,163	6.3%	4.7%
2008	215,138	3,478,577	7.5%	5.4%
2009	219,478	3,535,200	13.3%	9.2%
2010	216,620	3,511,326	12.9%	10.0%
2011	211,482	3,461,428	11.7%	9.3%
2012	209,404	3,471,282	9.4%	8.1%
2013	208,351	3,463,869	8.5%	7.0%
2014	209,309	3,489,666	7.0%	6.1%
2015	214,351	3,545,904	6.5%	5.7%
2016	220,790	3,635,200	6.3%	5.3%
2017	227,382	3,724,722	5.1%	4.8%
Average Annual Growth Rate (AAGR - Labor Force):				
2006-17	0.9%	1.0%	--	--
2012-17	1.7%	1.4%	--	--

Sources: U.S. Bureau of Labor Statistics. Data is as of April 2018.

Comparative Wage Trends (2000-16)

Year	Median Hourly Wage		Average Hourly Wage		Median Annual Wage*	
	Clark County	Washington State	Clark County	Washington State	Clark County	Washington State
2000	$14.07	$14.99	$18.71	$22.45	$38,979	$41,528
2001	$14.63	$15.75	$19.58	$22.44	$39,916	$42,972
2002	$15.05	$16.12	$20.11	$22.75	$40,518	$43,399
2003	$15.25	$16.34	$20.47	$23.44	$40,260	$43,138
2004	$15.57	$16.66	$20.93	$23.60	$40,282	$43,102
2005	$15.99	$17.15	$21.66	$24.16	$39,915	$42,811
2006	$16.37	$17.76	$22.30	$25.18	$39,799	$43,178
2007	$16.96	$18.38	$23.12	$26.22	$40,380	$43,761
2008	$17.30	$18.98	$23.88	$27.26	$40,123	$44,020
2009	$17.80	$19.48	$24.73	$28.02	$41,152	$45,036
2010	$18.01	$19.92	$24.85	$28.74	$40,961	$45,305
2011	$18.32	$20.25	$25.36	$29.60	$40,511	$44,779
2012	$18.66	$20.56	$26.17	$30.42	$40,652	$44,791
2013	$19.01	$21.00	$26.37	$31.04	$40,871	$45,150
2014	$19.27	$21.48	$27.16	$32.28	$40,816	$45,497
2015	$19.99	$22.03	$28.01	$32.98	$42,193	$46,499
2016	$20.39	$22.72	$28.93	$34.61	$42,737	$47,621
Average Annual Growth Rate:						
2000-16	2.3%	2.6%	2.8%	2.7%	0.6%	0.9%
2006-16	2.2%	2.5%	2.6%	3.2%	0.7%	1.0%
2012-16	2.2%	2.5%	2.5%	3.3%	1.3%	1.5%

$19.99 denotes the median minimum wage threshold for CERB capital funding, per CERB web site: https://deptofcommerce.app.box.com/v/cerbcountymedianwage, as of February 2018.

* Note: Annual wage figures are adjusted for inflation.
Hourly wage figures are not inflation-adjusted.

Source: Scott Bailey, Regional Labor Economist,
Washington State Employment Security Department.
Includes all jobs covered by unemployment insurance,
except for private households and federal government.

END NOTES

[1] Information for this economic feasibility study has been obtained from sources deemed to be reliable. Data for this assessment was compiled over the mid-2017 to early-2018 time period. The accuracy of information from third party sources is not guaranteed and is subject to change without notice. Observations and findings of this report are those of the author and should not be construed as the opinion of any other party prior to their express approval, whether in whole or part.

[2] The southeastern portion of the UH-10 Urban Holding area includes the Mill Creek Overlay District.

[3] Critical/constrained lands are defined based on the Clark County *Buildable Lands Report,* Appendix C, June 2015. Constrained lands include:

- 100-year floodplain or flood fringe
- Wetlands inventory (NWI, high quality, permitted, modeled) with 100-foot buffer
- Slopes greater than 15%
- Land slide area that has active or historically unstable slopes
- Designated shorelines
- Hydric soils with 50-foot buffer
- Habitat areas with 100-foot buffer
- Species areas with 300-foot buffer
- Riparian stream buffers by stream type

[4] Clark County's VBLM defines vacant residential parcels has having building values of less than $13,000. For commercial and industrial lands, vacant is defined as a parcel with building value less than $67,500.

[5] The proposed re-designation is associated with Annual Review Case CPZ2017-00012 Wollam. Transportation analysis indicates that trips at build-out could go from 61 DUs and 581 trips per day at current R1-10 densities to 335 DUs with 3,192 trips per day with the R-12 designation as proposed. However, it is unclear whether this would affect VBLM capacity estimates for 179th Street area holding zones – as the VBLM appears to assume an average of 8.0 units per acre across the area independent of zoning designation.

[6] A *Focused Public Investment Plan: Infrastructure Cost Report* was prepared for the Clark County Department of Community Development consulting services support from David Evans and Associates, Inc., Parsons Brinkerhoff, and Henderson, Young and Company, by report dated April 28, 2003.

[7] The major planned commercial development is Three Creeks, situated on both sides of NE 179th street immediately east of the I-5 freeway interchange. Owned by Killian Pacific, Three Creeks has trips reserved by an existing development agreement with the stipulated property not part of a designated Urban Holding area.

[8] As described by Washington State Department of Revenue, *First Come Basis Project Demonstrations,* per web site: http://www.dor.wa.gov/Docs/Pubs/LocalRevitalization/FirstComeBasisDescriptions.doc

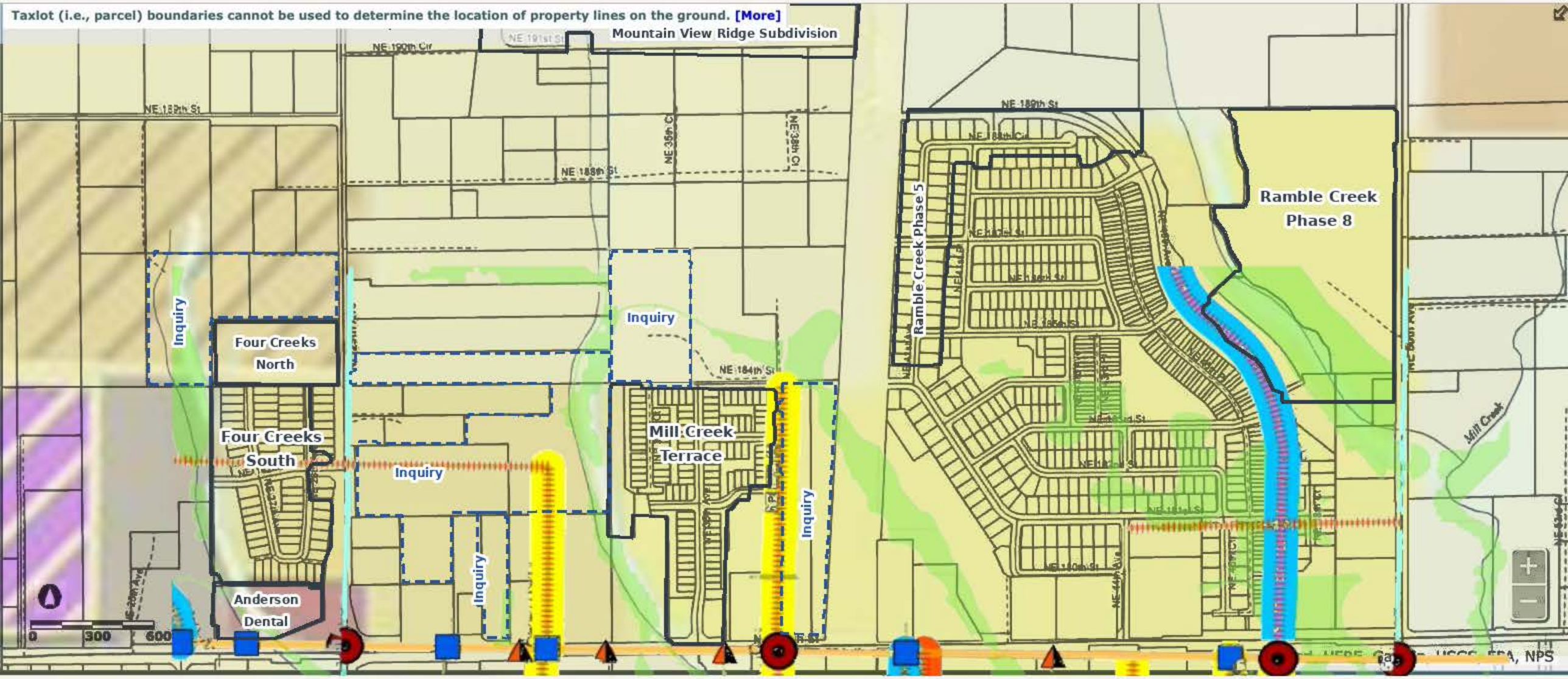
[9] If densities were to be adjusted to the mid-point between current minimum and maximum zoned densities by zone district for the UH overlay area, the number of added residential units accommodated at build-out might be increased somewhat from 4,815 to about 4,965 units – a relatively small 3% difference across all residential zones when aggregated together.

[10] Scott Bailey, Regional Labor Economist, *Clark County Profile,* updated January 2016.

[11] Per CREDC web site www.credc.org, as of January 2018.

NE 179TH STREET CORRIDOR — NORTH SIDE, NE 29TH AVENUE TO NE 50TH AVENUE

Parcels, zoning, planned roads and development | unincorporated Clark County, Washington | four sources composited on the county GIS parcel base



DEVELOPMENT (Clark Regional Wastewater District, Active and Potential Development Activities, March 2026)

- Mountain View Ridge Subdivision & Pump Station
- Four Creeks North Subdivision
- Four Creeks South Subdivision
- Anderson Dental
- Mill Creek Terrace Subdivision
- Ramble Creek Subdivision Phase 5
- Ramble Creek Subdivision Phase 8
- Development inquiry (unnamed in CRWWD slides)

ZONING (Clark County zoning view, 8-20-26)

- **R-24** Multifamily Residential
- **OR-36** Office Residential
- **MX** Mixed Use
- **CC** Community Commercial
- **R1-20** Single-Family Residential
- **R1-10** Single-Family Residential
- **R1-6** Single-Family Residential
- **R1-7.5** Single-Family Residential
- **R-5** Rural-5 (outside UGA)
- **AG-20** Agriculture-20 (outside UGA)

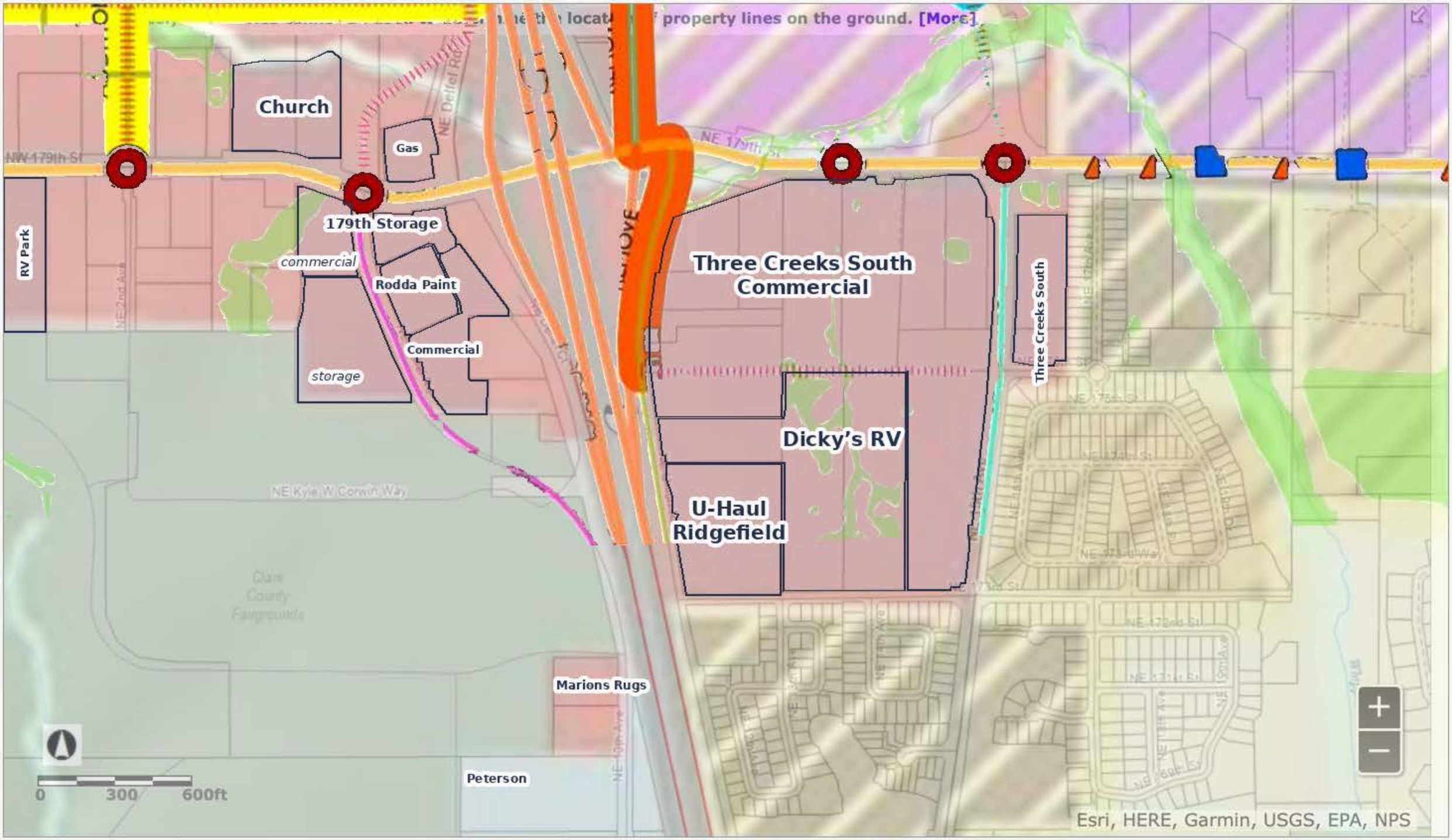
PLANNED ROAD NETWORK (179th Street Circulation and Access Management Plan, DKS, July 2023 — Figure 8)

- Remove existing alignment
- Realign
- Addition (new street)
- Proposed arterial
- Roundabout
- Shared access, right-in / right-out
- Interim access, emergency use only
- Potential wetlands presence
- Minor arterial – 4 lanes w/CLT & bike
- Collector – 2 lanes w/ bike lanes
- Principal arterial (NE 179th St)

Development boundaries are transcribed from the CRWWD slides of 3-19-26 (overview map for inquiries; NE 29th Ave and NE 50th Ave sheets for named sites), registered to this frame by fitting their taxlot linework to the GIS parcel lines (residual about ±18 ft), then snapped to the GIS parcels each site covers. Mountain View Ridge continues north of this tile. The county viewer's cyan parcel-selection highlight was removed from the base.
Zoning is the county's own zoning map (8-20-26), registered to the parcel base; parcels that one solid zone clearly covers take the county's colour for that zone so edges follow parcel lines; hatched and split parcels keep the county rendering.
Figure 8 registered on NE 29th Ave, NE 50th Ave and NE 179th St (residual about ±40 ft); its map frame ends about 1,900 ft north of NE 179th St, so the upper part of the tile has no planned-road coverage.
Parcel lines are Clark County GIS and cannot be used to determine property lines on the ground. Not a survey.

NE 179TH STREET AT I-5 — PARCELS, ZONING, PLANNED ROADS AND DEVELOPMENT

NE Delfel Road to NE 19th Avenue, unincorporated Clark County, Washington | four sources composited on the county GIS parcel base



DEVELOPMENT (sites as marked on the author's field map)

- Three Creeks South Commercial
- 179th Storage — spans NE Delfel Rd
- Church
- Dicky's RV
- Rodda Paint
- Gas
- U-Haul Ridgefield
- RV Park — west edge
- Three Creeks South
- Commercial

ZONING (Clark County zoning view, 8-20-26)

- **GC** General Commercial
- **R-36 / R-50** Multifamily Residential
- **OR-24** Office Residential
- **IL** Light Industrial
- **OR-36** Office Residential
- **R1** Single-family residential, subtype not resolved
- **R-24** Multifamily Residential
- **n/a** Fairgrounds — no district shown

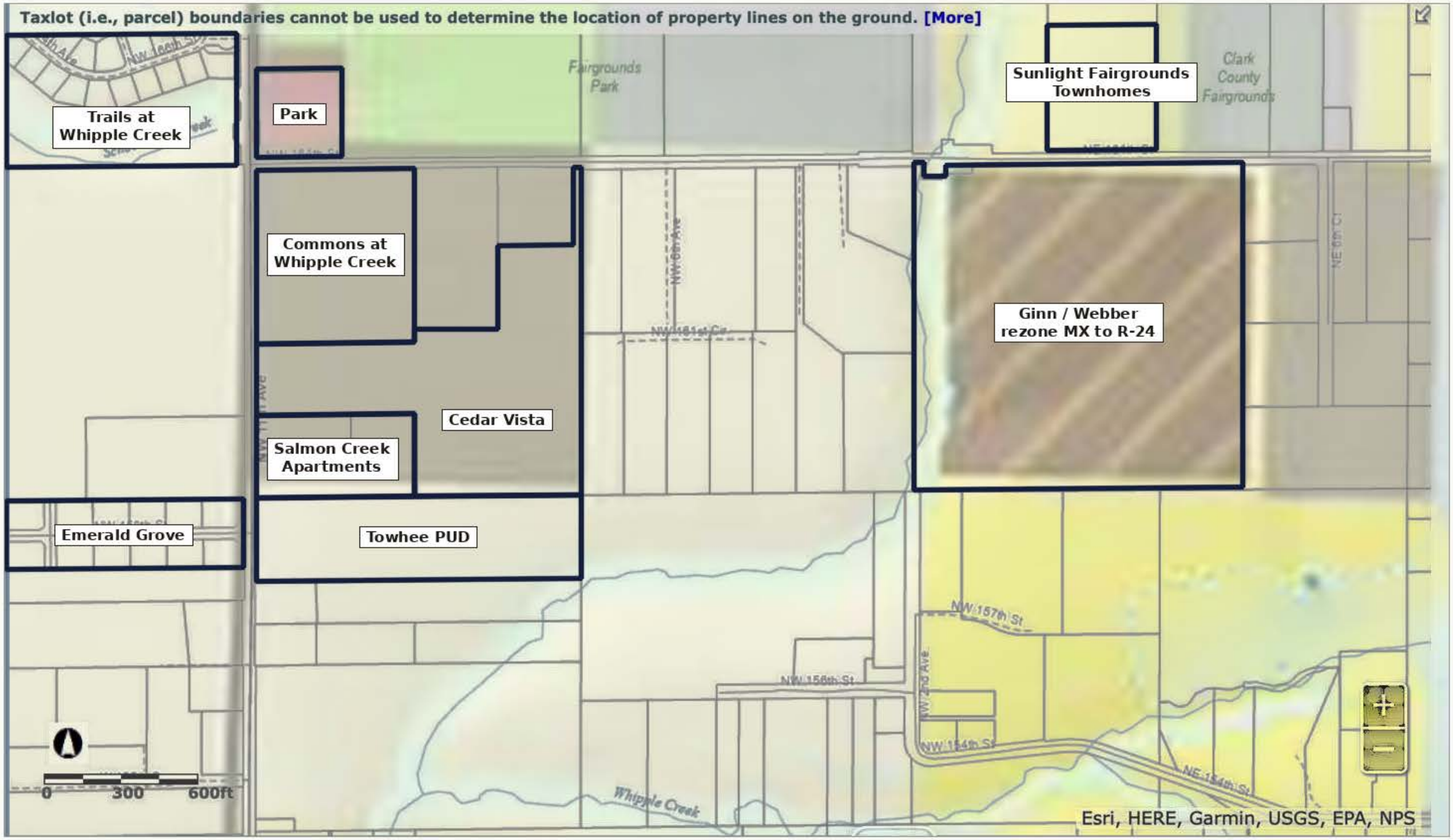
PLANNED ROAD NETWORK (179th Street Circulation and Access Management Plan, DKS, July 2023 — Figures 6 and 7)

- Remove existing alignment
- Roundabout
- Realign
- Shared access, right-in / right-out
- Street addition
- Interim access, emergency use only
- Proposed arterial
- Potential wetlands presence

Development sites are the county taxlot polygons themselves: each site was identified from the author's annotated field map, photographed and registered to this frame by homography, and every boundary then taken from the parcel linework. The one exception is the line between 179th Storage (east) and Commercial, which divides a single L-shaped taxlot and is drawn as marked. Marions Rugs and Peterson were marked as labels without boundaries. The RV Park parcel at the west edge runs off the side of the tile, and its written label falls outside the photograph. 179th Storage is one development on both sides of NE Delfel Road; on the west side the north parcel is commercial, the south parcel storage. F residual about ±40 ft. Zoning enlarged 7.31× and fitted by driving its district boundaries onto the parcel linework; the source carries about 28 ft per pixel, so zone edges carry roughly ±40 ft of softness. Single-family districts and the R-36 / R-50 pair cannot be told apart at this raster resolution. Parcel lines are Clark County GIS and cannot be used to determine property lines on the ground. Not a survey.

NW 11TH AVENUE & NW 164TH STREET — PARCELS, ZONING AND DEVELOPMENT

NW 164th St to NW 154th St, west of I-5, unincorporated Clark County, Washington | county GIS parcel base with zoning and development overlaid



DEVELOPMENT (built, in process, or designated — as identified by the author)

- Trails at Whipple Creek
- Cedar Vista
- Ginn / Webber (rezone MX to R-24)
- Emerald Grove
- Salmon Creek Apartments
- Park
- Towhee PUD
- Commons at Whipple Creek
- Sunlight Fairgrounds Townhomes

— Unoutlined parcels are not spoken for

ZONING (Clark County zoning view, 8-20-26, laid over the parcel base — county colours, see note)

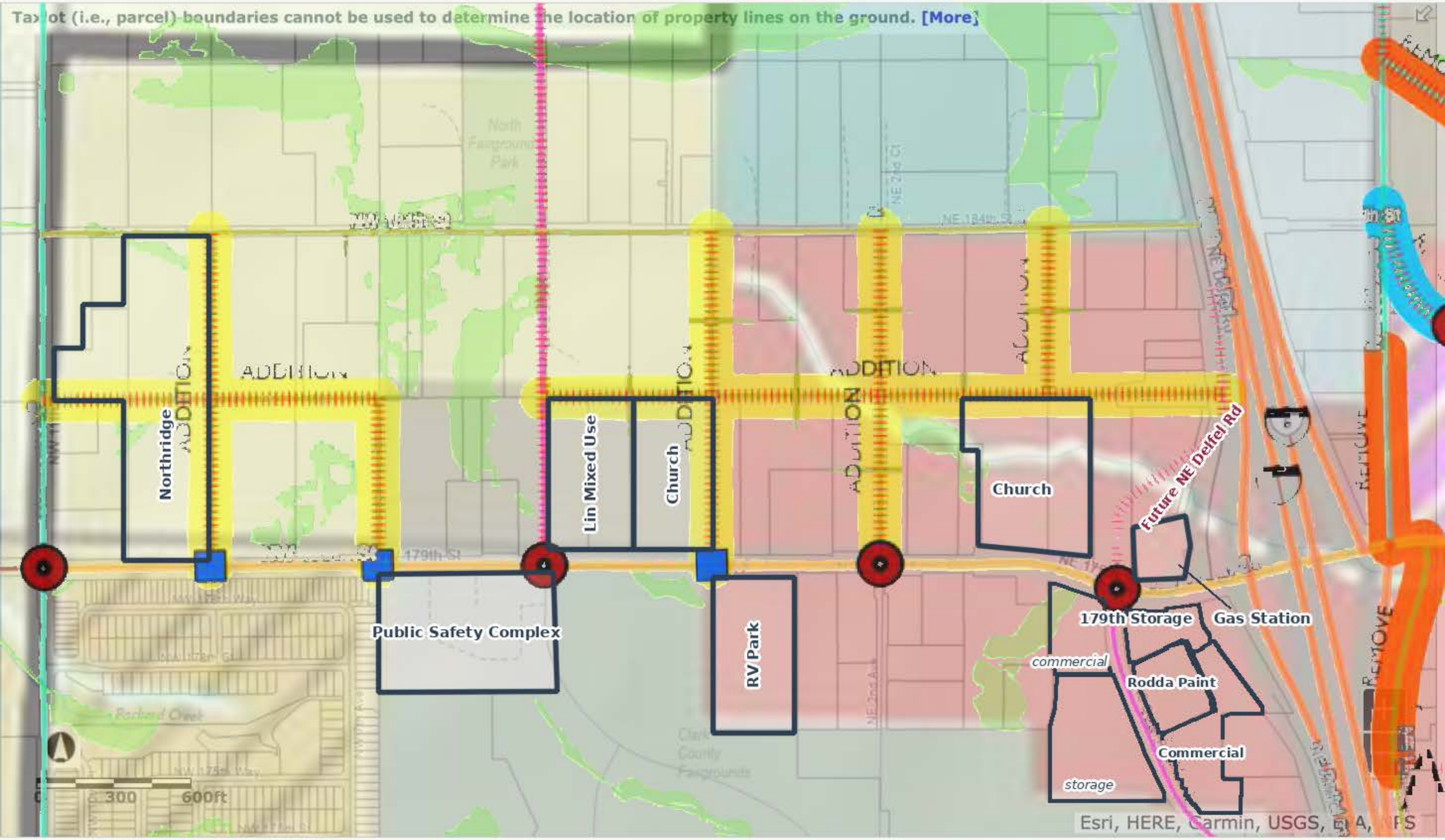
- **R1-20** Single-Family 20,000 sf
- **R1-10** Single-Family 10,000 sf
- **R1-7.5** Single-Family 7,500 sf
- **MX** Mixed Use
- **NC** Neighborhood Commercial
- **R-24 / R-36 / R-50** Multifamily Residential
- **Parks / Open Space** Fairgrounds Park
- **No zoning shown** Fairgrounds — basemap shows through

Parcel base: Clark County GIS taxlot view. Taxlot boundaries cannot be used to determine the location of property lines on the ground; this is not a survey.

Development boundaries are transcribed from the author's annotated field map, registered to this frame by feature matching, then snapped to the parcel lines they were drawn against. Parcels shown without an outline carry no development designation on that map. The zoning layer is the county zoning view of 8-20-26 itself, registered to this frame, enlarged about 7.6x and laid over the parcel base at partial opacity — the colours, hatching and zone edges are the county's own, not redrawn. At that enlargement zone edges carry roughly ±30 ft of softness and do not always coincide with the parcel lines beneath them; R-24, R-36 and R-50 share one hatch and are not separable. Zoning for any individual parcel should be confirmed against the county zoning map before it is relied on.

NW 179TH STREET CORRIDOR — PARCELS, ZONING, PLANNED ROADS AND DEVELOPMENT

NW 11th Avenue to NE Delfel Road / I-5, unincorporated Clark County, Washington | four sources composited on the county GIS parcel base



DEVELOPMENT (built, in process, or designated — as identified by the author)

- **Northridge**
- **Lin Mixed Use**
- **Church (two sites)**
- **Public Safety Complex**
- **RV Park**
- **Gas station (by future NE Delfel Rd)**
- **179th Storage — spans NE Delfel Rd**
- **Rodda Paint**
- **Commercial (east of NE Delfel Rd)**

ZONING (Clark County zoning view, 8-20-26)

- **GC** General Commercial
- **MX** Mixed Use
- **R1-10** Single-Family Residential
- **R-24** Multifamily Residential
- **BP** Business Park
- **IL** Light Industrial
- **OR-36** Office Residential
- **—** No zoning district shown

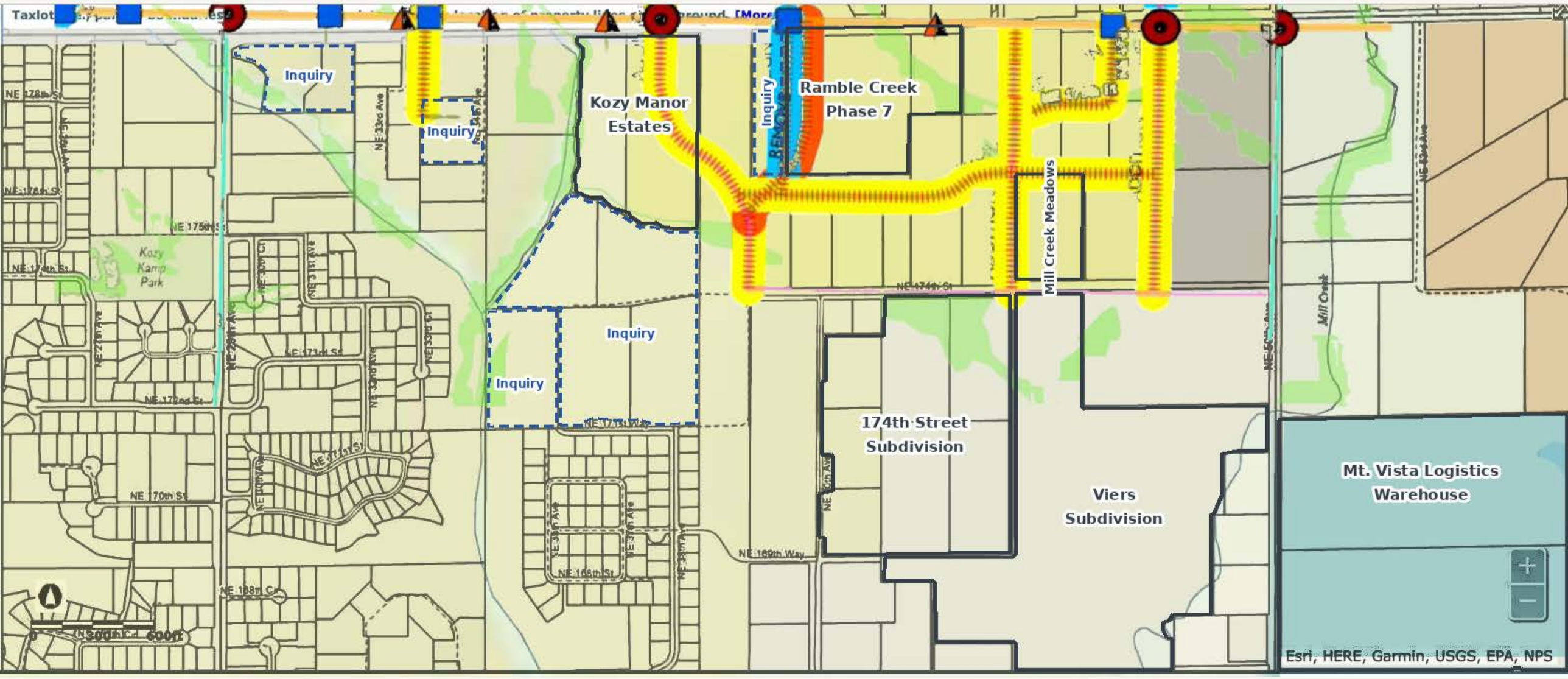
PLANNED ROAD NETWORK (179th Street Circulation and Access Management Plan, DKS, July 2023 — Figure 6)

- **Addition (new street connection)**
- **Proposed arterial — future NE Delfel Rd**
- **Remove existing alignment**
- **Realign**
- **Roundabout**
- **Shared access, right-in / right-out**
- **Potential wetlands presence**
- **Existing arterial classification**

Development boundaries are drawn to Clark County GIS parcel lines, from the author's annotated field map registered to this frame by matching the printed map furniture; they are approximate, not surveyed lines.
Figure 6 fitted by cross-correlation of shared linework and carries the source figure's ~1.6° rotation from north; residual along NW 179th St on independent check points is about ±10 ft, loosening to roughly ±25 ft near the I-5 interchange.
Zoning fitted on NW 11th Ave, NW 184th St, NW 179th St and the Whipple Creek tributary, then enlarged about 7.3x, so zone edges carry roughly ±30 ft of softness. Grey areas carry no zoning district in the source view.
179th Storage (both sides of NE Delfel Rd, north parcel commercial and south parcel storage), Rodda Paint and Commercial are carried over from the author's NE 179th St at I-5 composite, registered to this frame by cross-correlation of the shared linework; their boundaries are the county taxlot polygons exactly as drawn there.
Parcel lines are Clark County GIS and cannot be used to determine the location of property lines on the ground. Not a survey.

NE 179TH STREET CORRIDOR — SOUTH SIDE, NE 29TH AVENUE TO NE 50TH AVENUE

Parcels, zoning, planned roads and development | unincorporated Clark County, Washington | four sources composited on the county GIS parcel base



DEVELOPMENT (Clark Regional Wastewater District, Active and Potential Development Activities, March 2026)

- Kozy Manor Estates Subdivision
- Ramble Creek Subdivision Phase 7
- Mill Creek Meadows
- 174th Street Subdivision
- Viers Subdivision & Pump Station
- Mt. Vista Logistics Warehouse
- Development inquiry (CRWWD — no project name given)

ZONING (Clark County zoning view, 8-20-26)

- **R1-20** Single-Family Residential
- **R1-10** Single-Family Residential
- **R1-7.5** Single-Family Residential
- **MX** Mixed Use
- **BP** Business Park
- **R-5** Rural-5 (outside UGA)
- **AG-20** Agriculture-20 (outside UGA)

PLANNED ROAD NETWORK (179th Street Circulation and Access Management Plan, DKS, July 2023 — Figure 8)

- Remove existing alignment
- Realign
- Addition (new street)
- Proposed arterial
- Roundabout
- Shared access, right-in / right-out
- Interim access, emergency use only
- Potential wetlands presence
- Minor arterial – 4 lanes w/CLT & bike
- Collector – 2 lanes w/ bike lanes
- Principal arterial (NE 179th St)

Development boundaries are transcribed from the CRWWD slides of 3-19-26 (overview map and the NE 174th St / NE 50th Ave sheet), registered to this frame by fitting their taxlot linework to the GIS parcel lines (residual about ±20 ft), then snapped to the GIS parcels each site covers. The overview map ends near NE 171st Way, so the southern edge of the large inquiry south of Kozy Manor is taken to the next parcel line and may extend farther.
Zoning is the county's own zoning map (8-20-26), registered to the parcel base; each parcel that one zone clearly covers takes the county's colour for that zone so zone edges follow parcel lines, and split parcels keep the county rendering.
Figure 8 registered on NE 29th Ave, NE 50th Ave, NE 179th St and NE 174th St (residual about ±40 ft); it ends about 1,900 ft south of NE 179th St, so the lower part of the map has no planned-road coverage.
Parcel lines are Clark County GIS and cannot be used to determine property lines on the ground. Not a survey.