

From: Sarah Fox
Sent: Monday, April 19, 2021 11:44 AM
BCC: Planning Commission
Cc: Phil Bourquin; Robert Maul; Madeline Sutherland; David Schultz
Subject: April 20th Planning Commission Meeting
Attachments: Camas HAP - Revised Economic Conditions and Trends.pdf

Good morning Commissioners,

This email will provide a little more information on the draft Housing Action Plan that is on your agenda. Most importantly, this draft is a working copy that will be amended through this legislative process.

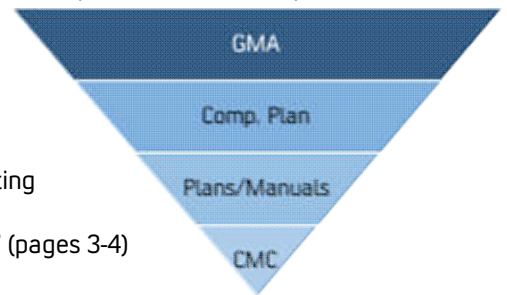
The Housing Action Plan is intended to move the city forward on its housing goals and policies. You may want to review the comprehensive plan, Chapter 2 Housing. Here is a link to the comprehensive plan:

https://www.cityofcamas.us/sites/default/files/fileattachments/community_development/page/5841/compplan2016.pdf

We will talk more in depth about how this plan *and other city plans* fit between the comprehensive plan and the municipal code ("CMC") on Tuesday.

Much of the draft plan has not changed from the previous version that you reviewed, and if you would like to focus on the changes, you can skip to these pages:

- Added an acknowledgements page (page i)
- Revised introduction to reflect that this is the entire draft report versus just the existing conditions (page 2)
- Added two definitions: "Growth Management Act" and "HUD Median Family Income" (pages 3-4)
- Added comments received on the project website (pages 20-21)
- Revised Camas population forecasts to align with forecasts used in the housing need projections (page 25)
- **Attached** to this email are **revisions to pages 36-47** that reflect new economic data that was recently released
- Added housing need projections as required by Dept. of Commerce and added map and data from Clark County Vacant Buildable Lands Modeling (pages 83-90)
- Chapter 7: Housing Strategies begins on page 105 (pages 105-121)



And lastly, please remember to not "respond all" to emails sent to the Commission in accordance with the Open Public Meetings Act (OPMA). With that said, you are always welcome to contact me or other staff directly with questions.



Sarah Fox, AICP (She/Her)

Senior Planner

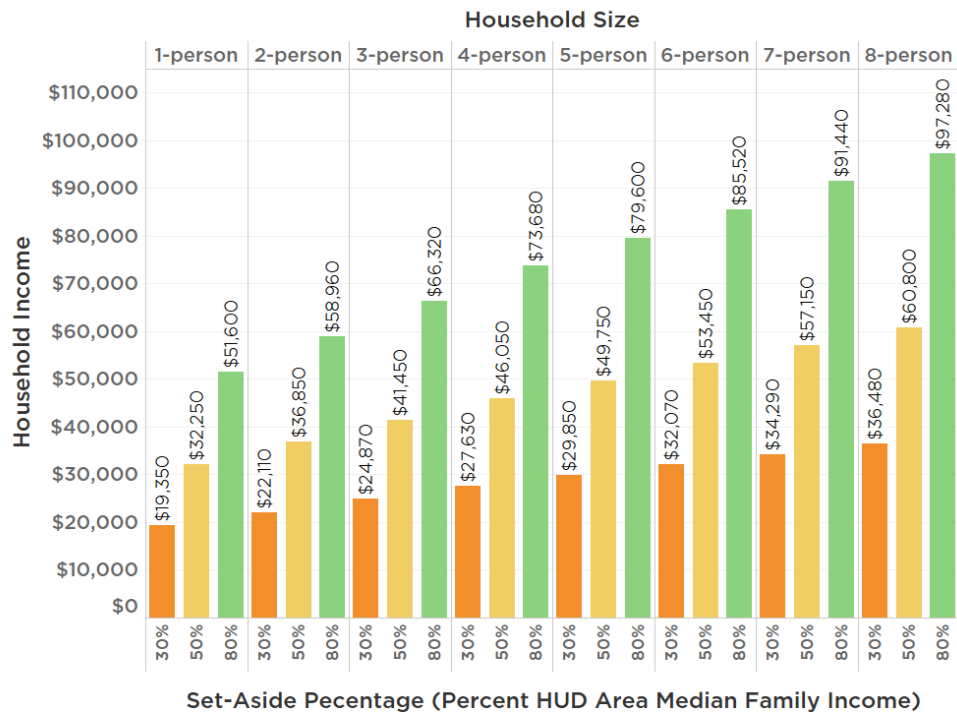
Desk 360-817-7269

Cell 360-513-2729

www.cityofcamas.us | sfox@cityofcamas.us

(Note: These pages replace pages 36-47 of the draft HAP in your packets.)

Figure 19: Income Limits by Household Size for Selected Percentages of HUD Area Median Family Income, Clark County, 2020



Data Source: Washington State Housing Finance Commission. (2020). Income and Rent Limits for All Tax Credit and Bond Financed Properties. Clark County Income and Rent Limits. Effective 4/1/20.

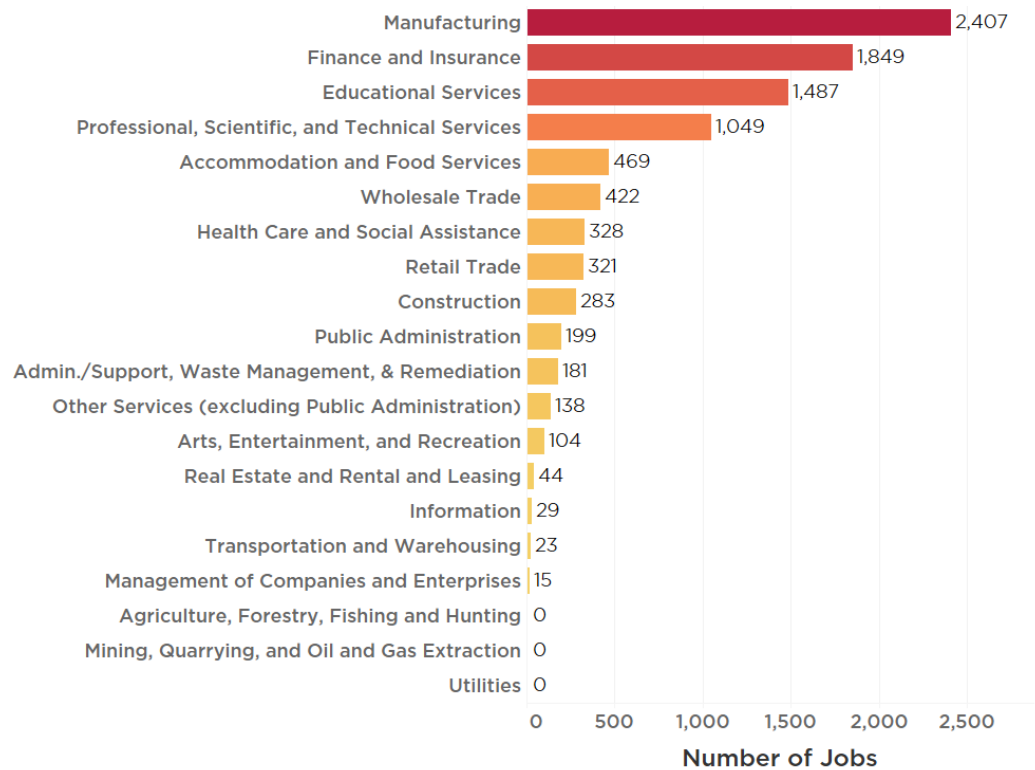
Economic Conditions and Trends

Current Workforce and Employment Trends

An estimated [9,348,720](#) total jobs ~~were~~ ~~are~~ located in the city of Camas ~~as of 2018~~. Jobs in the sectors of manufacturing, [finance and insurance](#), educational services, and professional, scientific, and technical services make up the majority of these jobs (72.662.7%, or an estimated [6,792,452](#) jobs). In addition to those top sectors, the accommodation and food services, wholesale trade, retail trade, and healthcare and social assistance sectors each provide between 300 and 500 jobs in the city (see Figure 20). Of the [9,348,720](#) jobs located in Camas, an estimated [8,969,678](#) (95.941%) are workers' primary jobs,² indicating that some individuals working in the city hold multiple jobs.

² A primary job is the highest paying job for an individual worker for the year. The count of primary jobs is the same as the count of workers.

Figure 20: Number of Jobs by NAICS Industry Sector (All Jobs), City of Camas, 2018



Data Source: Census OnTheMap, 2018

The top employers in 2020 were Fisher Investments (1,725 employees), Wafertech (1,000), and the Camas School District (800 employees). Fisher Investments, a professional services investment firm, comprises 20.2% of the city's jobs and represents the fastest growing sector of employment in the city (see Figure 20b).

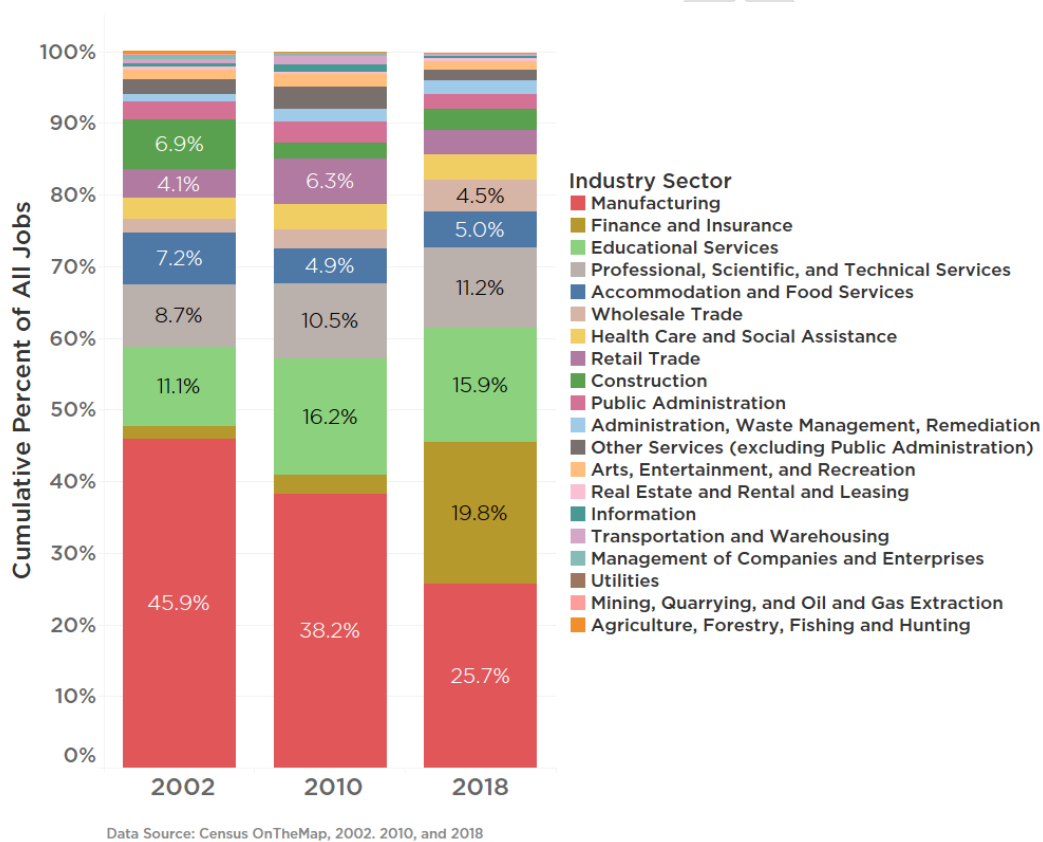
Figure 20b: Principal Employers, City of Camas, 2020

EMPLOYER	EMPLOYEES	PERCENT OF TOTAL CITY EMPLOYMENT
Fisher Investments	1,725	20.2%
Wafertech	1,000	11.7%
Camas School District	800	9.4%
Linear Technology (Analog)	340	4.0%
Sigma Design	273	3.2%
City of Camas	226	2.6%
Georgia Pacific	150	1.8%
Fuel Medical	150	1.8%
Plexys	91	1.1%
Bodycote	50	0.6%
Total	4,805	56.3%

Data Source: [Washington Employment Security Department](#), [Columbian Newspaper](#)

While manufacturing jobs made up a high proportion of all jobs in 2018 and prior decades, the share has been declining over time, and the city's economy has become more diversified. In 2018, ~~While manufacturing jobs made up a high proportion all jobs in 2017, the share has been declining over time, and the city's economy has become more diversified. Manufacturing jobs declined as a percentage of all jobs from 43.5% in 2002 to 30.2% in 2017. During the same time period, jobs in finance and insurance, educational services, wholesale trade, and professional, scientific, and technical services made up increasing proportions of jobs in the city (see Figure 21). The wholesale trade and healthcare and social assistance sectors also increased as shares of the city's jobs.~~

Figure 21: Jobs Located in the City of Camas by NAICS Industry Sector, 2002, 2010, and 2018 (All Jobs)

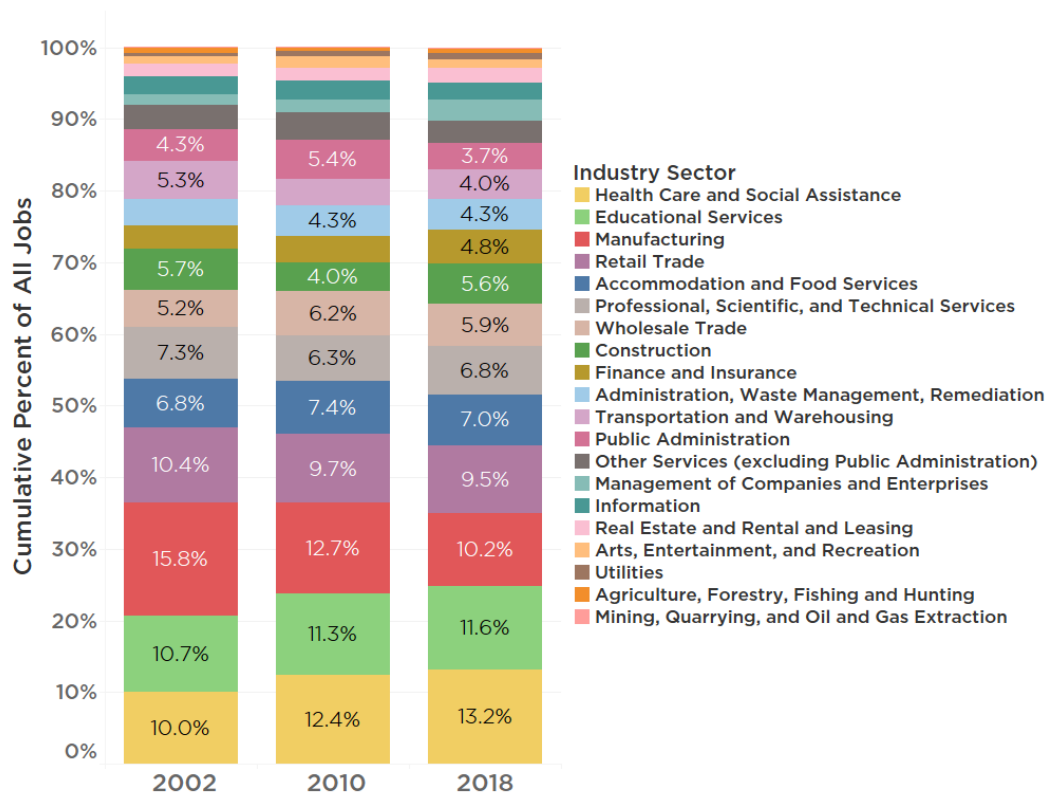


While manufacturing jobs have represented the largest share of jobs based in Camas, the city's residents ~~are have been~~ employed in a more diverse array of industry sectors (see Figure 22). As manufacturing jobs declined as a proportion of jobs located in the city from 2002 to 2018, healthcare and social assistance and educational services overtook manufacturing as residents' top sources of employment. During that time period, healthcare and social assistance, ~~finance and insurance, and management of companies and enterprises, and educational services~~ saw the greatest increases as shares of jobs held by Camas residents

(3.26, 1.5, and 1.30 percentage point increases, respectively), while manufacturing and transportation and warehousing, and public administration saw the greatest declines (5.63, 1.4, and 1.32 percentage point declines, respectively). Other industry sectors have remained relatively constant as shares of total jobs held by Camas residents, each increasing or declining as shares of jobs held by residents by less than 1 percentage point.

The differences in industry sectors of jobs located in the city and jobs held by the city's residents indicate high levels of commuting into and out of the city by workers and residents to access employment.

Figure 22: Jobs Held by Camas Residents by NAICS Industry Sector, 2002, 2010, and 2018 (All Jobs)



Data Source: Census OnTheMap, 2002, 2010, and 2018

As these shifts in industry sectors have occurred, the city has seen an increase in the numbers of jobs with higher wages, while the numbers of jobs with low and very-low wages have remained relatively constant and slight decreases in jobs with low and very-low wages (see Figure 23). Longitudinal Employer-Household Dynamics (LEHD) statistics track jobs in the wage categories of \$1,250 per month and below (\$15,000 per year and below); \$1,251 to \$3,333 per month (\$15,001 to \$39,996 per year); and \$3,333 per month and above (\$39,996 per year and

above). Although not an exact indicator of living wages, the percentage of jobs that pay \$3,333 and above can be used to approximate the potential for households to be able afford to support their families based on typical expenses, family size, composition, and location. For example, in Clark County, a household with two working adults and two children is estimated to require \$73,017 per year in income before taxes to afford basic expenses such as housing, food, childcare, medical care, transportation, taxes, and other expenses.³

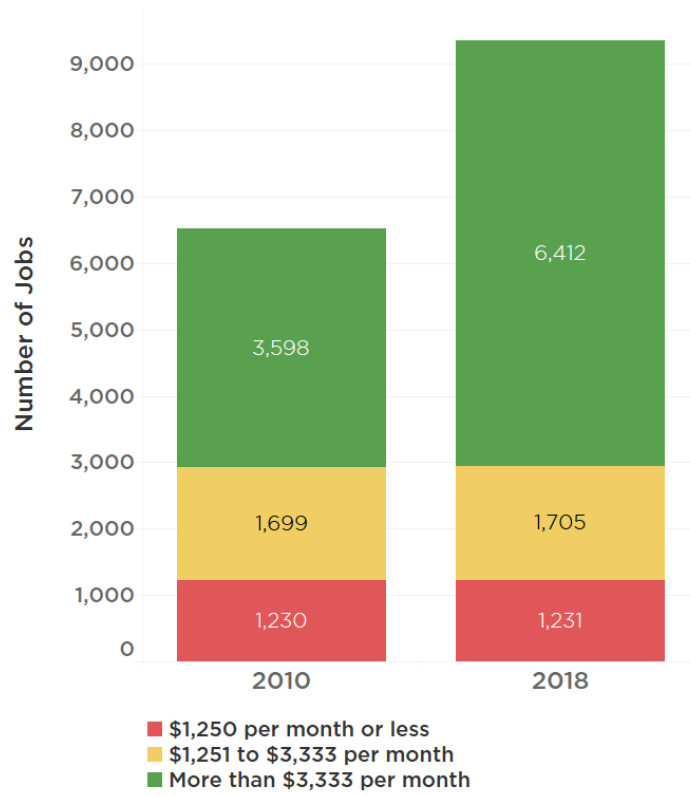
In this way, if two workers in a household with that composition earn \$39,996 per year and above, the household would typically be able to afford estimated basic expenses in Clark County. However, in the case of some other household compositions—for example, a household with two adults in which only one is working, or with two working adults and three or more children—the working individuals would need to have incomes significantly more than \$39,996 per year, making the wage categories less useful in some cases. Still, these categories provide a useful benchmark for examining changes in employee wages and ability to afford basic expenses over time.

From 2010 to 2018, Camas gained an estimated 2,814 jobs with wages of \$3,333 per month and above, a 78.2% increase, while it lost an estimated 24 jobs with wages between \$1,251 and \$3,333 (a 1.5% decline) and an estimated 133 jobs with wages of \$1,250 per month and below (a 2.7% decline).

Relative to Clark County and the Portland-Vancouver-Hillsboro metropolitan area, Camas has a higher percentage of jobs that pay more than \$3,333 per month and lower percentages of jobs that pay less than \$3,333 per month (see Figure 24). Still, an estimated 31.4% of jobs located in the city pay less than \$3,333 per month, indicating that many employees working in Camas may have difficulty meeting basic needs or affording housing in the city. Notably, the median household income in Camas is \$106,513, and just 13.9% of residents earn \$35,000 or less. The higher proportion of low-wage jobs located in the city relative to the low proportion of residents with lower incomes indicates that many Camas residents work at higher-paying jobs based outside of the city, while residents working lower-wage jobs often must commute into the city.

³ MIT Living Wage Calculator. (2020). Living Wage Calculation for Clark County, Washington. Retrieved from: <https://livingwage.mit.edu/counties/53011>

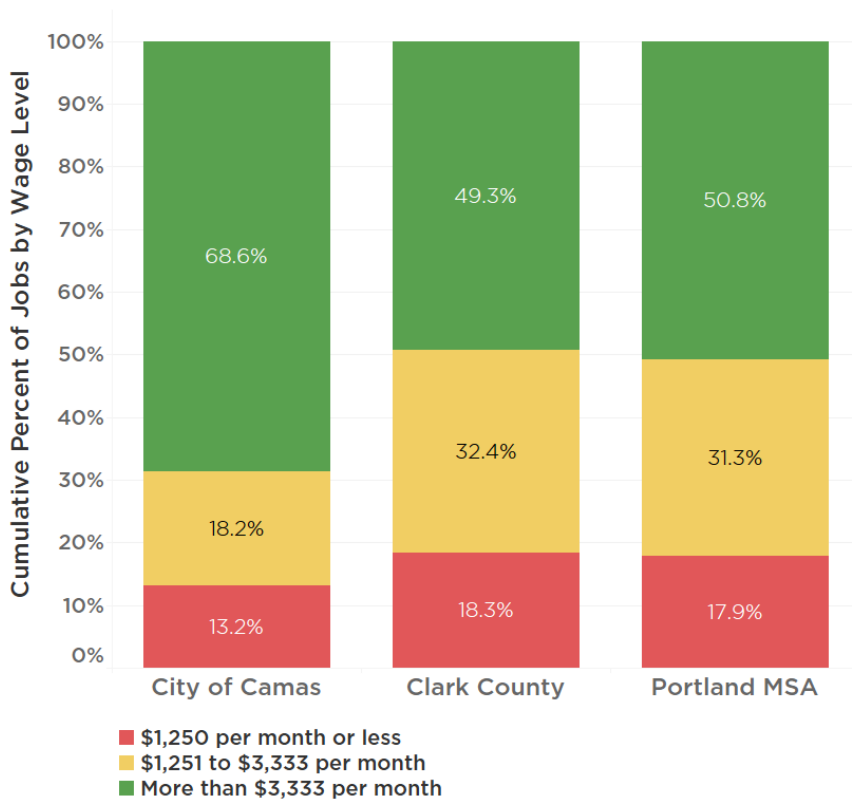
Figure 23: Number of Jobs by Wage Level (All Jobs), City of Camas, 2010 and 2018



Data Source: Census OnTheMap, 2010 and 2018

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Figure 24: Percent of Jobs by Wage (All Jobs), City of Camas, Clark County, and Portland-Vancouver-Hillsboro OR-WA Metro Area, 2018



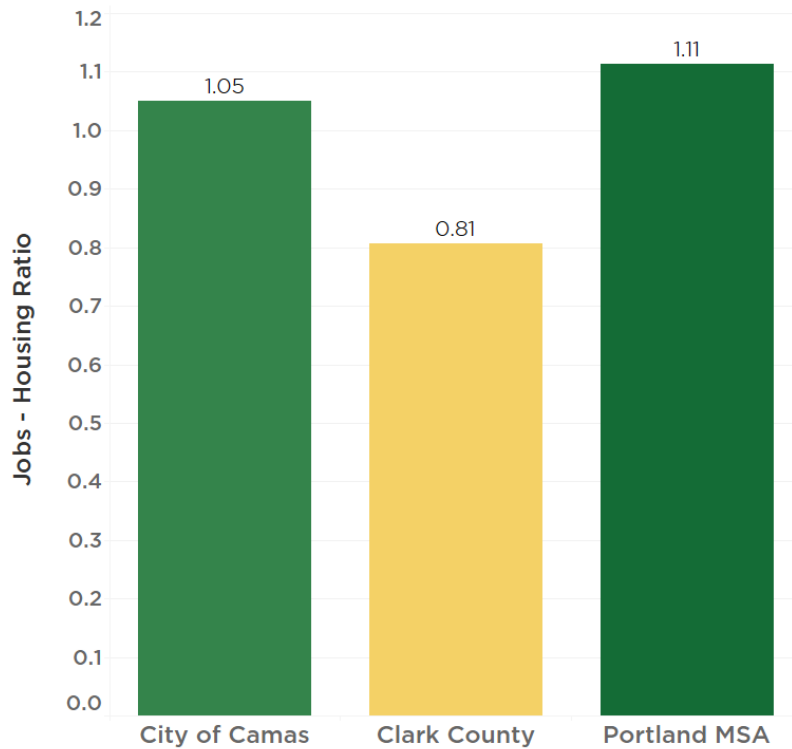
Data Source: Census OnTheMap, 2018

Jobs-Housing Balance

As of 2018, an estimated 8,969 primary jobs and 8,538 housing units were located in Camas, a ratio of 1.0508 jobs per housing unit. In Clark County as a whole, there were an estimated 149,193 jobs and 184,794 housing units, a jobs-housing ratio of .8178.

The jobs-housing ratios in Camas and There are significantly more jobs per housing unit in the Portland-Vancouver-Hillsboro metropolitan area (a jobs-housing ratio of 1.11) are significantly higher than the county's ratio, pointing to the clustering of jobs in and around the city of Portland, relative to the city and county. Given similar unemployment and labor force participation rates among the jurisdictions, the lower jobs-housing ratios in Camas and Clark County indicates that residents living further from job centers in and around the city of Portland in these areas are more likely to commute outside of their jurisdictions for work or to work from home for employers located outside of the county-city or county.

Figure 25: Jobs – Housing Ratio, City of Camas, Clark County, and Portland-Vancouver-Hillsboro OR-WA Metro Area, 2018⁷ (Primary Jobs)

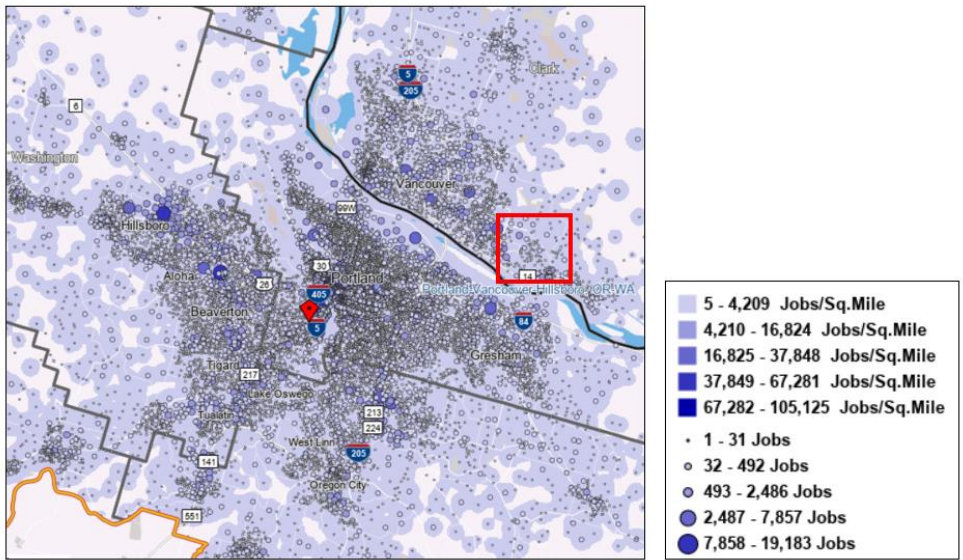


Data Source: Census OnTheMap (2018 Primary Jobs), State of Washington Office of Financial Management, 2020 (2018 Housing Units in City of Camas and Clark County), American Community Survey 1-Year Estimates (2018 Housing Units in Portland-Vancouver Hillsboro OR-WA MSA)

Geographic Distribution of Jobs

Jobs in the region are clustered in the city of Portland and in some of its surrounding suburbs (see Figure 26). In Clark County, jobs tend to be clustered in the southern portion of the county in and around Vancouver, which lies about 14 miles west of Camas (see Figure 27). Jobs in the city of Camas itself are clustered in the city's downtown (southeast Camas) and in the northern and western portions of the city (see Figure 28).

Figure 26: Locations of Jobs in Portland-Vancouver-Hillsboro OR-WA MSA, 2017 (All Jobs)



Data Source: Census OnTheMap, 2017. City of Camas

Figure 27: Locations of Jobs in Clark County, 2017 (All Jobs)

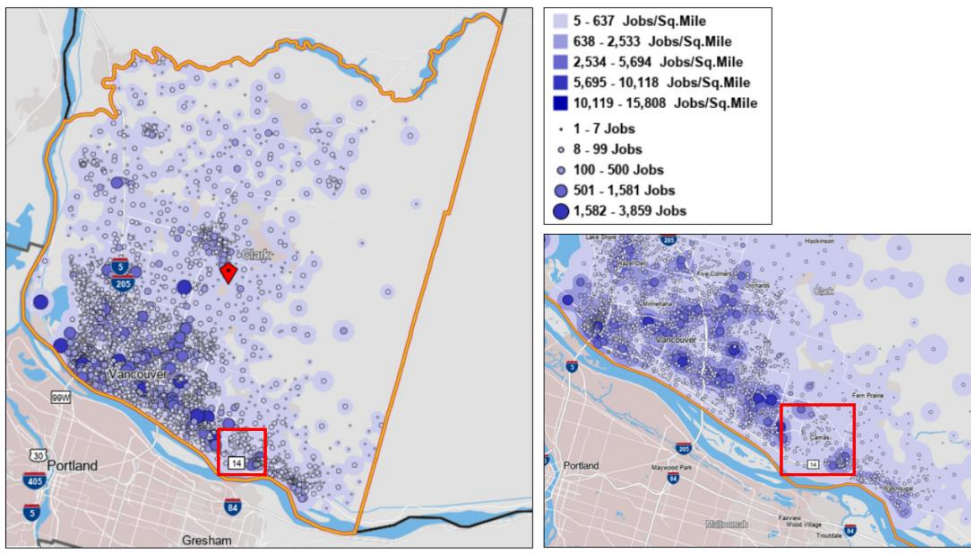
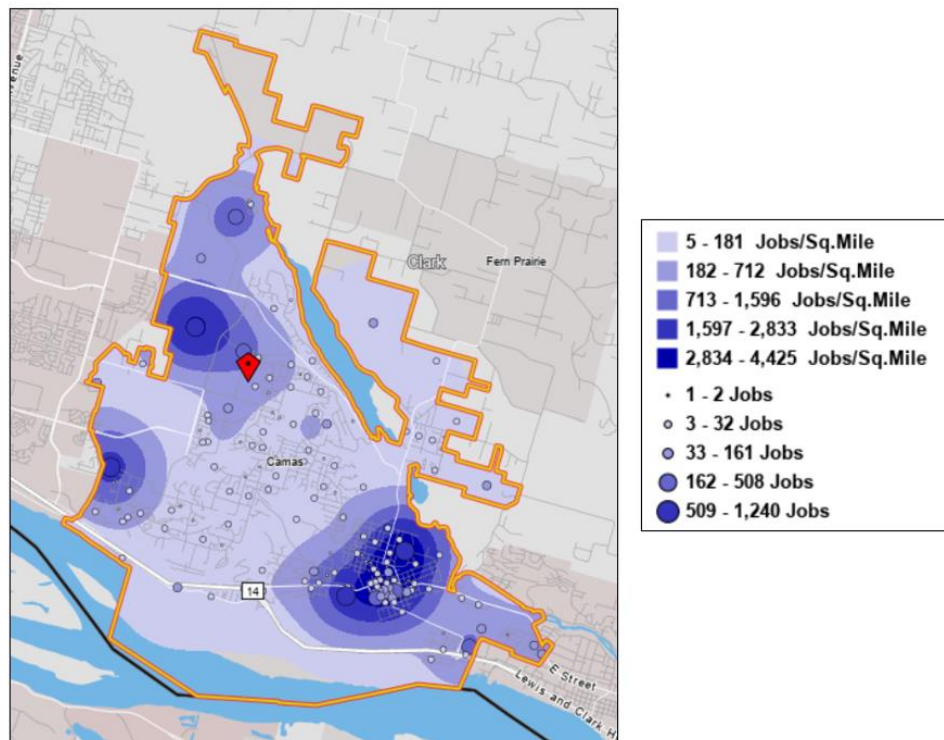


Figure 28: Locations of Jobs, City of Camas, 2017 (All Jobs)



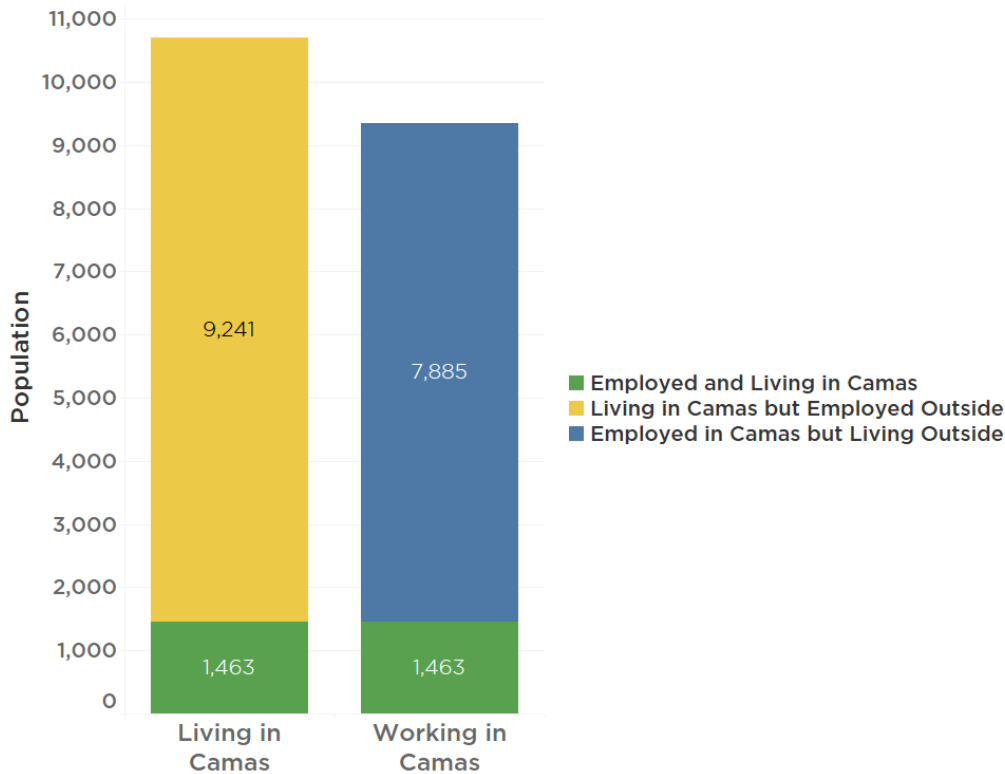
Data Source: Census OnTheMap, 2017

Commuting Patterns

While an estimated [9,348,208](#) jobs are located within the city of Camas, just [1,463,232](#) are held by residents who both live and work in the city ([15.7](#) of jobs in Camas). An estimated [7,885,976](#) jobs ([84.329](#)% of jobs in the city) are held by workers who are employed in Camas but live outside of the city. At the same time, an estimated [9,241,521](#) of the [10,704,753](#) jobs held by Camas residents ([86.374](#)% of jobs held by residents) are located outside of the city (see Figure 29).

Residents and stakeholders who participated in this planning process also noted that Camas residents tend to be employed outside of the city or state, with some emphasizing a need to attract additional high-wage jobs to the city. Participants more often noted schools, amenities, and other quality of life factors as reasons that residents move to Camas than jobs located within the city. Stakeholders also emphasized a lack of affordable housing as a primary reason that individuals employed in Camas may have to find housing outside of the city.

Figure 29: Commuting Patterns of Resident and Non-Resident Workers, City of Camas, 2018 (All Jobs)



Data Source: Census OnTheMap, 2018

Commute distances vary only slightly by workers' wage levels. An estimated 84.74% of all workers commute 50 miles or less to their jobs, and 80.89% commute less than 25 miles. At the same time, an estimated 15.36% of all workers commute more than 50 miles to their jobs, and 19.1% commute more than 25 miles.

Workers with lower wages are slightly more likely than higher-wage workers to commute more than 50 miles for their jobs (16.74% of workers with monthly wages up to \$1,250, 17.1% of workers with monthly wages of \$1,251 to \$3,333, and 14.47% of workers with wages \$3,333 and above). Lower-wage workers are also slightly more likely to commute less than 10 miles to work (50.019% of workers with monthly wages up to \$1,250, 46.92% of workers with monthly wages of \$1,251 to \$3,333, and 44.852% of workers with wages \$3,333 and above).

Figure 30: Distance Traveled to Work by Wage, City of Camas Residents (for Primary Jobs), 2018⁷



Data Source: Census OnTheMap, 2018

Employment Projections

Total non-farm employment in the Southwest Washington region is projected to grow from 208,000 to 233,900 from 2018 to 2028, an increase of 25,900 jobs. Education and health services (40,400 jobs), government (37,900 jobs), professional and business services (25,700 jobs), and retail trade (24,800 jobs) are projected to continue providing the most jobs in the region, while the sectors projected to add the most jobs by 2028 include education and health services (6,600 jobs), leisure and hospitality (4,100 jobs), government (3,900 jobs), and professional and business services (3,500 jobs). The information, leisure and hospitality, and education and health services sectors are projected to have the fastest average annual growth rates during the time period (2.3%, 2.1%, and 2.0%, respectively). The manufacturing, retail trade, and wholesale trade sectors are projected to have the slowest average annual growth rates (0.19%, 0.38%, and 0.71%, respectively).