

APPENDIX B

Phase 1 Analyses

Existing Conditions, Opportunities, and Constraints
Market Analysis



Existing Conditions, Opportunities, and Constraints

**City of Camas
North Shore Subarea Plan**

Submitted to

**City of Camas
Camas, Washington**

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Submitted by

**WSP USA
210 East 13th Street, Suite 300
Vancouver, Washington 98660-3231**

3160072.000

EXISTING CONDITIONS, OPPORTUNITIES, AND CONSTRAINTS

North Shore Subarea Camas, Washington

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EXISTING CONDITIONS, OPPORTUNITIES, AND CONSTRAINTS

NORTH SHORE SUBAREA PLAN

CAMAS, WASHINGTON

1.0 INTRODUCTION

The City of Camas (City) is beginning work on a subarea plan for the area north of Lacamas Lake, known as the North Shore (see Figure 1). Over the next 20 years, the entire city – including the North Shore – is anticipated to experience substantial growth and development as a result of population growth in the greater Southwest Washington region. The population of Camas itself is growing at a rapid rate, having jumped over 20% from 2010 to 2019, and projected to grow by another 40% by 2035.¹

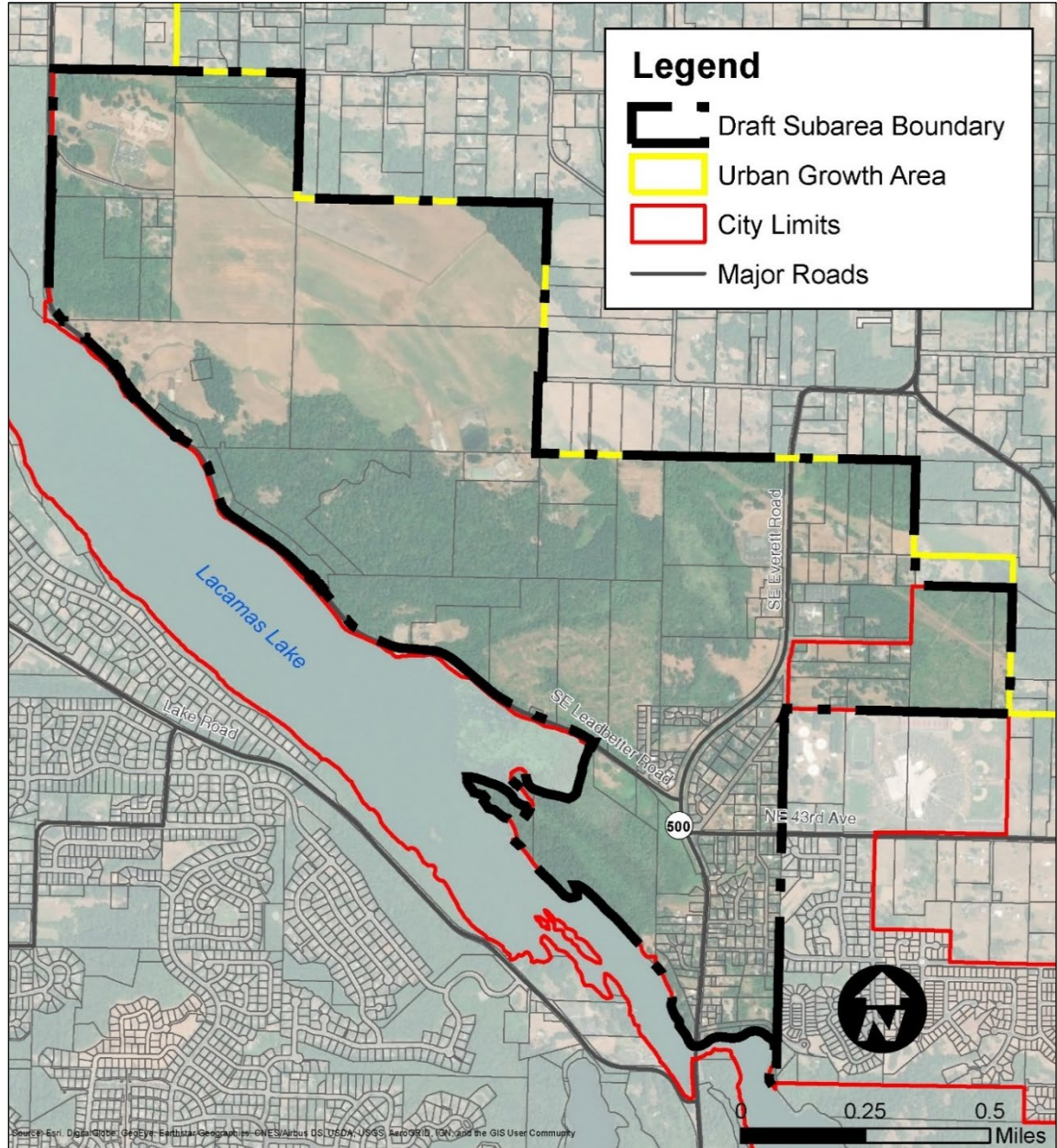
The North Shore subarea consists of over 900 acres of primarily agricultural land, single-family residences with large, rural acreages in the North Shore area and smaller lot residential development along SR 500 with some commercial uses at the southern end of the lake. Large, sparsely developed parcels have made the North Shore a prime target for developers seeking to locate in the rapidly growing city. For the past decade, development interests have focused on the large parcels available in the north of the subarea, hoping to capitalize on the large-acreage “business park” zoned properties. In addition, multiple single-family subdivisions have been constructed or planned near Lacamas Lake. Some of these are slated for luxury dwellings, and the most recently approved subdivision will consist of over 200 lots². This trend of large subdivisions and homes for high-income families, while one type of housing needed in the city, does not provide the variety of housing or mixed-use development that the community envisioned in their comprehensive plan, Camas 2035 that was adopted in 2016.

As the city faces ongoing population growth and development pressure, many residents have expressed frustration at the loss of open space and a desire to maintain the small town feel that they love. In addition, residents have expressed concerns that the booming population will continue to squeeze the existing housing market, making homes in Camas less affordable for future generations. The long-range North Shore Subarea Plan presents a unique opportunity for the community to establish a vision for over 900 acres in the city, one that balances the need for employment lands to provide living wage jobs; residential lands to provide for a mix of income and residence types; and sufficient parks and trails to maintain access to open spaces and recreation, which is considered a defining feature of Camas life.

¹ The 2019 population estimate is 24,090 and the 2035 population projection is 34,098 (Washington Office of Financial Management [OFM] 2019).

² The subdivision, if constructed, is named “CJ Dens”.

Figure 1. North Shore draft subarea boundary



The purpose of the subarea planning process is to guide future development in the North Shore in a way that respects private property rights and preserves the unique character of the area while anticipating the needs of future residents.

This report includes an assessment of existing conditions within the boundaries of the North Shore subarea and evaluates the adequacy of Camas' regulatory framework to support the types of land uses anticipated for this area based on the community's desire for balanced growth. Key considerations for the development of the subarea plan are summarized in section 4.

2.0 EXISTING CONDITIONS

The following sections describe the existing conditions within the subarea including land use and zoning; parks, trails, and open spaces; critical areas; utility (water and sewer) infrastructure and capacity; and the current transportation network and planned improvements. Consideration is given as to how these existing conditions will contribute to the future of the North Shore, which was envisioned in Camas 2035, as an area to fulfill the employment and retail needs of the growing population and reduce trips outside of the city.

2.1 LAND USE AND ZONING

The North Shore subarea consists of a range of development, from small lot, residential and “main street” commercial development in the southern portion of the area along SR 500, to farmland and large, developable rural parcels in the north. The nearby Port of Camas-Washougal airport (Grove Field), Clark County’s Lacamas Park, and Camas High School provide destinations for many passing through the area.

Zoning within the subarea is identified on Figure 2 and includes Camas designations. The portion of the subarea that falls outside of city limits, and within the city’s urban growth area has adopted comprehensive plan designations and will receive associated zoning when it is eventually annexed. Camas zoning within the subarea includes a mix of both single-family residential (R-7.5, R-10, R-12) and multifamily residential (MF-10, MF-18), Business Park (BP), Community Commercial (CC), and Open Space (OS). A Gateway/Corridor overlay zone extends along State Route 501 (SR 501) from NE Everett Drive (a primary gateway) to just past NE Lake Road (a secondary gateway). The purpose of this overlay is to create a sense of place in Camas along with building design cohesiveness. A primary gateway is a main entry into Camas and includes a corridor, whereas a secondary gateway is limited to an intersection or a few city blocks. In addition, most of the subarea lies within the Airport Overlay (zones A, B, and C), which restricts the height of proposed structures and land uses to ensure compatibility.

There is a mix of comprehensive plan land use designations within the subarea, which are reflective of the zoning (Figure 3). Designations include industrial, commercial, multifamily residential, single-family residential, and open space/parks. The portion outside of the city limits is designated as Urban Holding (UH) by the County.

City zoning adjacent to the subarea consists primarily of residential zones (R-6, R-7.5, R-10, R-12) and one parcel zoned neighborhood park (NP). The county zoning adjacent to the subarea includes a mix of residential acreage lots (5 to 10-acre parcels), as well as airport (A) and agriculture (AG-20).

It is anticipated that the portion of the subarea outside of city limits (but within the Urban Growth Boundary) will eventually be annexed into the city. As currently designated³, this portion of the subarea would likely be annexed into Camas as single

³ The city’s comprehensive plan map includes land use designations for areas outside city limits, yet within the urban growth area. Each comprehensive plan designation has associated zoning. Refer to the table of corresponding zones at [Camas Municipal Code, Section 18.050.020](#).

family residential, based on the current residential use of the properties and adjacent zoning.

Development standards for city zoning designations are outlined in Table 1 and Table 2 below.

Table 1. Development Standards

Standard	Zone						
	R-7.5	R-10	R-12	MF-10	MF-18	CC	BP
Maximum Density (dwelling units/net acre)	5.8	4.3	3.6	10	18	n/a allowed with a development agreement	n/a Residential not allowed
Minimum Density (dwelling units/net acre)	n/a	n/a	n/a	6.0	6.0		
Average Lot Size (sq. ft.)	7,500 ¹	10,000 ¹	12,000 ¹	n/a	n/a		
Min Lot Size (sq. ft.)	6,000	8,000	9,600	3,000	2,100	None	1/2 acre
Max Lot Size (sq. ft.)	12,000	14,000	18,000	n/a	n/a	None	None
Minimum Lot Width (ft.)	70	80	90	36	26	None	100
Minimum Lot Depth (ft.)	90	100	100	70	60	None	100
Max Building Coverage	40% ²	35% ²	30% ²	55%	65%	None	50%
Maximum Building Height	35 ³	35 ³	35 ³	35 ³	50 ⁴	None	None

¹ Average lot area is based on the square footage of all lots within the development or plat. The average lot size may vary from the stated standard by no more than 500 square feet.

² The maximum building lot coverage for single-story homes may be up to 45% in R-6 and R-7.5 zones, and 40% in R-10 and R-12 zones. To qualify for increased lot coverage, a single-story home cannot include a basement or additional levels.

³ Maximum building height: three stories and a basement, not to exceed height listed.

⁴ Maximum four stories but not to exceed height listed.

Table 2. Building Setbacks

Lot Area	Single-Family Zones ¹				MF-10	MF-18	CC ⁴	BP ⁴
	Up to 4,999 sq. ft.	5,000 to 11,999 sq. ft.	12,000 to 14,999 sq. ft.	15,000 or more sq. ft.				
Minimum front yard (ft.)	20	20	25	30	15 ²	10 ²	Note ⁵	15
Minimum side yard and corner lot rear yard (ft.)	5	5	10	15	3 ³	3 ³	None	15
Minimum side yard flanking a street (ft.)	10	10	15	15	15	15	None	15
Minimum rear yard (ft.)	20	25	30	35	10	10	None	50
Minimum lot frontage on a cul-de-sac or curve (ft.)	25	30	35	40	Note ⁶	Note ⁶	Note ⁶	Note ⁶

¹ Setbacks may be reduced to be consistent with the lot sizes of the development in which it is located. Notwithstanding the setbacks requirements of the zoning code, setbacks and/or building envelopes clearly established on an approved plat or development shall be applicable.

² 20 feet at garage front.

³ Maximum four stories but not to exceed height listed.

- ⁴ Commercial and industrial development setbacks shall be as follows, unless along a flanking street of a corner lot. If along flanking street, then the setback must be treated like a front, and provide safe sight distance.
- ⁵ Residential dwelling units shall satisfy the front setbacks of CMC Section 18.09.040 Table 2, based on comparable lot size.
- ⁶ Code is silent on this standard.

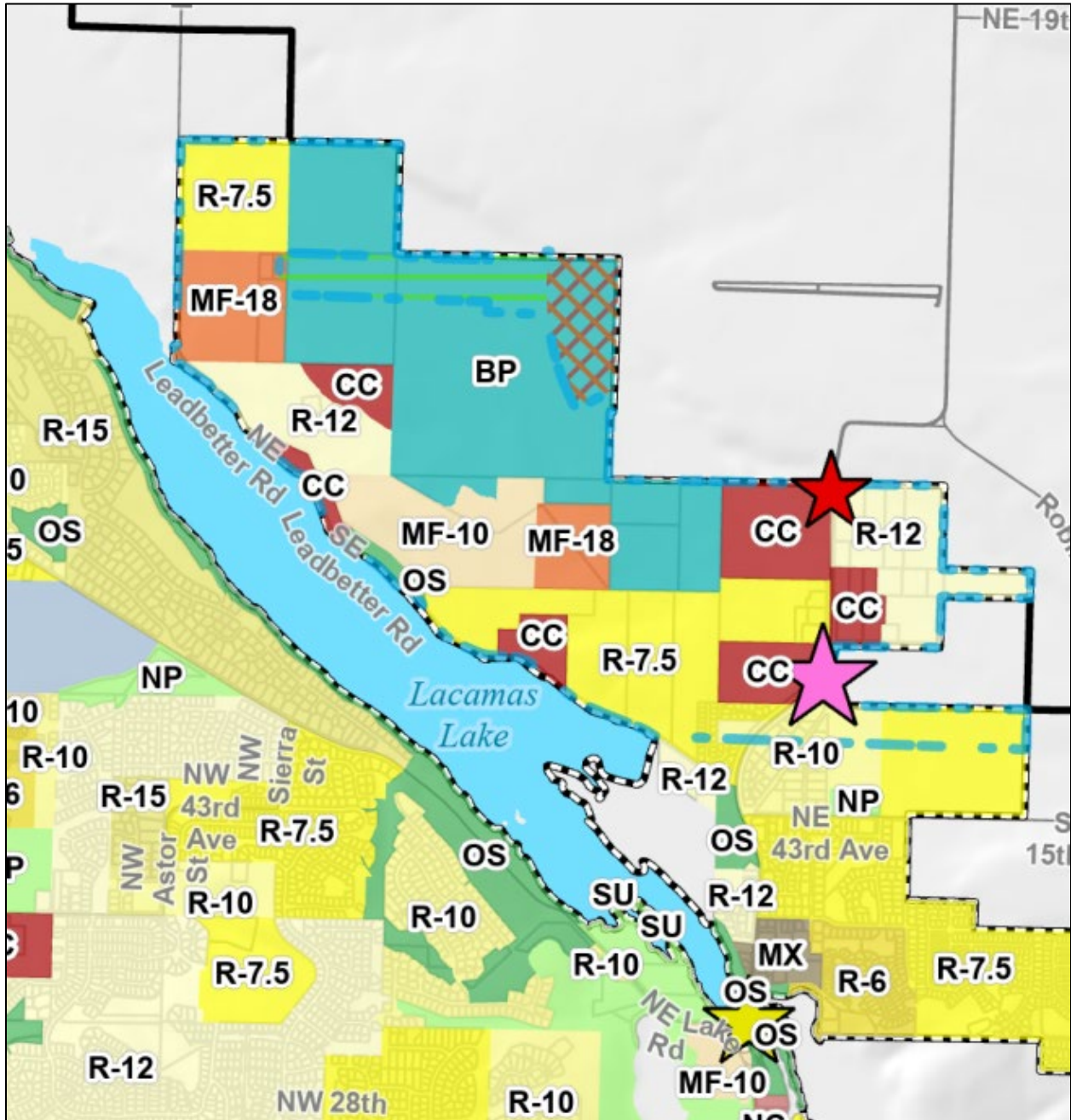
There is more flexibility in the development standards identified above through the City’s ordinance dealing with planned residential developments (PRD) and through development agreements in commercial zones. The PRD process is further described in section 3.3.4

Portions of the subarea are located in shoreline jurisdiction associated with Lacamas Lake and Round Lake. Future development within shoreline jurisdiction will be subject to the provisions of the city’s shoreline master program (SMP). Shoreline environment designations along Lacamas Lake consist primarily of Urban Conservancy, with two stretches of shoreline designated as Medium Intensity (see Figure 4). Per the SMP, “Medium Intensity shoreline designation is provided in the northeast portion of Lacamas Lake to provide a center for mixed-use development that will include water-dependent and water-oriented uses that increase the public’s ability to enjoy public waters and may include residential use in mixed-,use proposal.”

Although preliminary shoreline jurisdiction is shown on the SMP’s shoreline designations map, the actual extent is determined by site conditions. Jurisdiction includes lands extending 200 feet in all directions, as measured on a horizontal plane from the ordinary high water mark (OHWM), floodways, and contiguous floodplain areas landward 200 feet from such floodways, associated wetlands, critical areas with associated buffer areas, river deltas associated with the streams, and lakes and tidal waters that are subject to the provisions of this program. Therefore, more of the subarea may fall within shoreline jurisdiction than what is shown on the shoreline map.

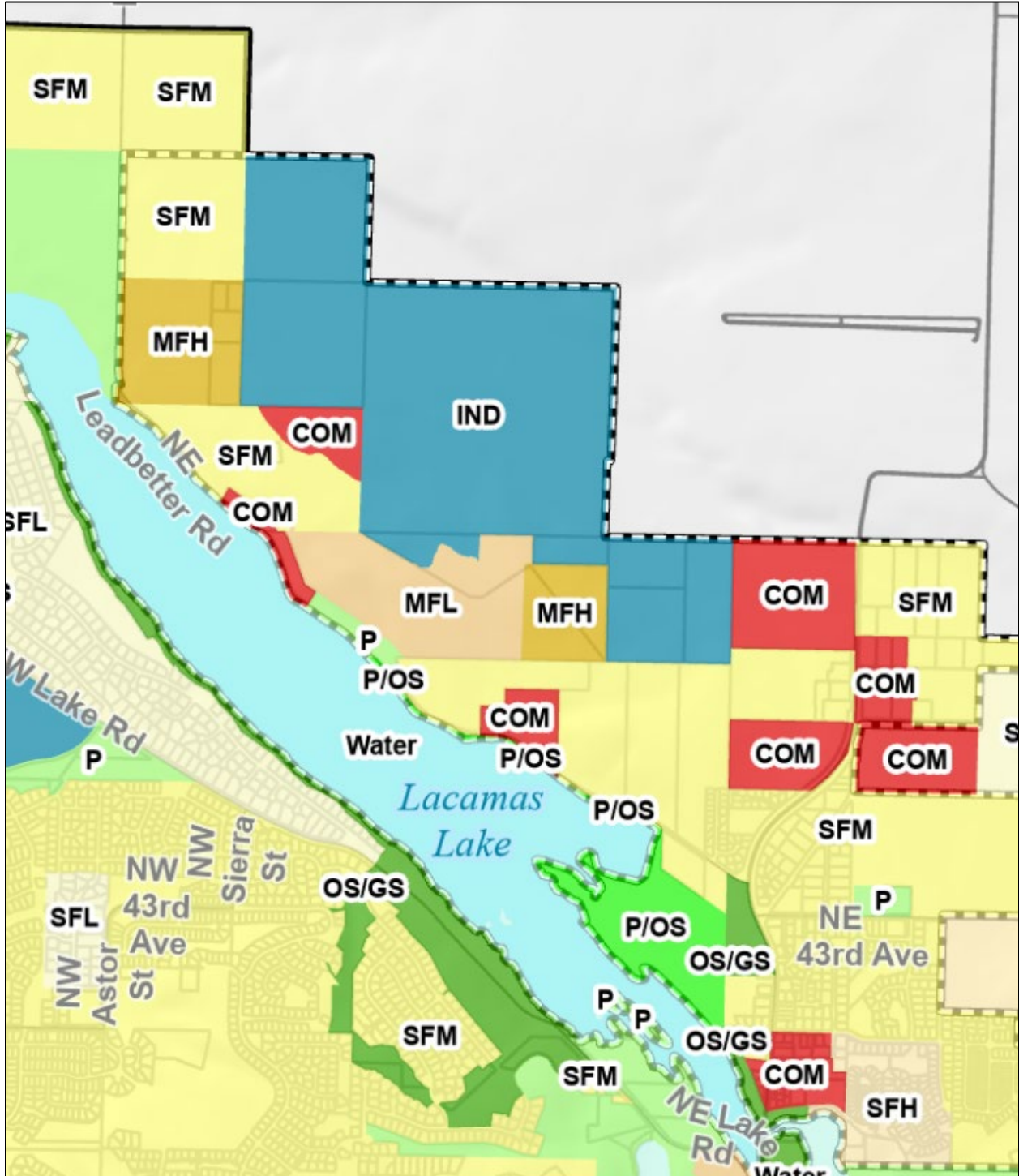
Development under the existing zoning would be subject to market demands and current zoning. Under the existing zoning there are limited provisions requiring mixed-use developments, walkability, or the preservation of open space beyond areas that are already protected as critical areas (e.g., streams, wetlands, steep slopes). The subarea planning process will identify the zone(s) that best accommodate the land uses anticipated within the subarea, and new zoning designations – specific to North Shore – may be recommended.

Figure 2. Zoning designations



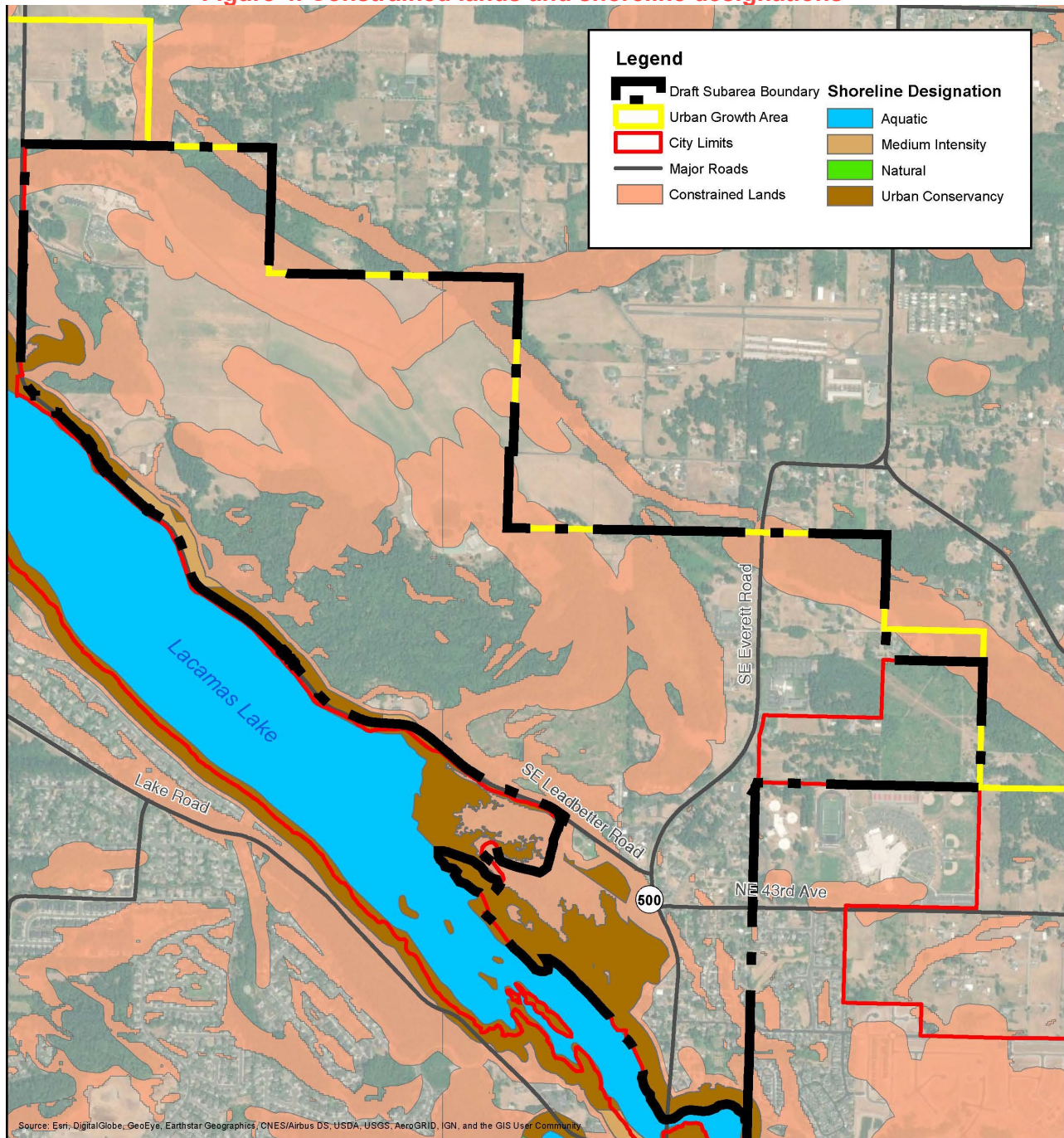
Key: Single-family residential (R-7.5, R-10, R-12), Multifamily residential (MF-10, MF-18), Business Park (BP), Community Commercial (CC), and Open Space (OS).

Figure 3. Comprehensive plan designations



Key: Single-family medium (SFM); Multi-family high (MFH); Multifamily low (MFL); Industrial (IND); Commercial (COM); Parks/Open Space (P/OS).

Figure 4. Constrained lands and shoreline designations



2.2 PARKS, TRAILS, AND OPEN SPACE

Existing and proposed parks, trails, and open spaces are identified in the city’s Parks, Recreation, and Open Space Comprehensive Plan (PROS) Plan (see Figure 5). There are no existing trails or developed park facilities within the subarea, although the county’s Lacamas Lake Regional Park is located just southeast of the study area. The regional park provides 312 acres of various recreational uses, including fishing and hiking. In addition, Camp Currie, a Clark County-owned property currently in use as

a youth camp, is located on 140 acres of forested lands bordering the subarea to the northwest.

Figure 5. Parks, Recreation & Open Space (PROS) plan map



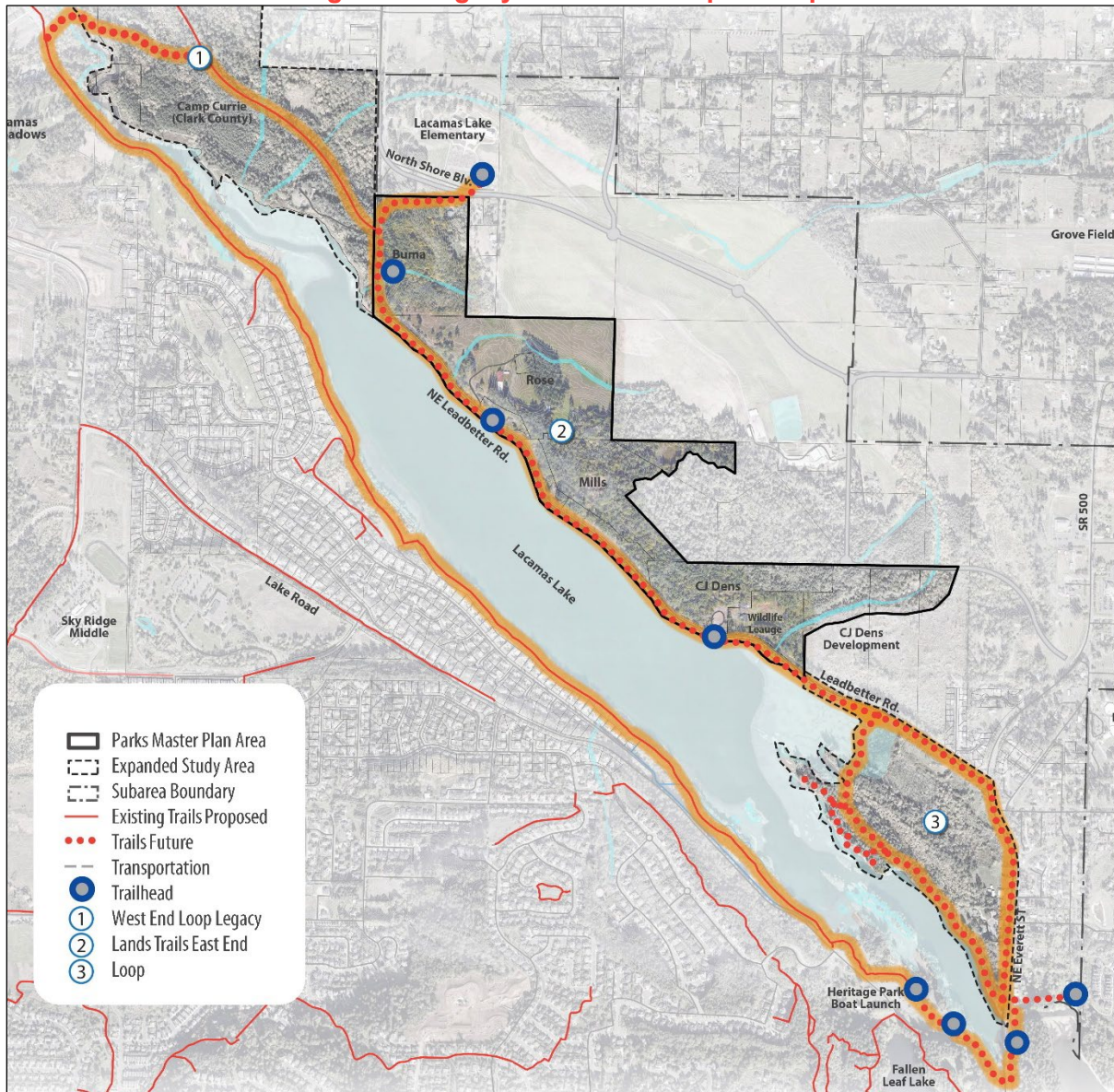
The City has taken several steps towards planning and developing new recreational areas to serve the growing population. Conceptual opportunities for additional recreational facilities in the North Shore were identified in the PROS Plan as detailed in section 3.4.

The City recently acquired property abutting the north side of the lake as part of a coordinated conservation effort for the North Shore, known as the Legacy Lands project. This project will expand the Lacamas Corridor park and greenway system by approximately 100 acres and will establish a multiuse trail loop around Lacamas Lake (see Figure 6). To accommodate this trail loop, the City is considering closing a portion of Leadbetter Road to vehicular traffic and converting it to a multiuse trail. Additional information is provided in section 2.5, Transportation Network and Capacity. Planning for the Legacy Lands project is currently underway and may include water-related recreational uses near the lake, such as boating facilities and shoreline trails, as well as active recreational uses further from the shoreline, such as sports fields and equestrian facilities. In addition to recreational uses, the plan may include commercial or retail uses, such as restaurants, event facilities, and equipment rental businesses to support recreational activities. The City will need to coordinate the evaluation of parks and open space needs under the subarea planning process with those identified and planned for the Legacy Lands project.

Stakeholders have expressed a strong desire for the existing natural areas within the study area to be maintained, as well as an interest in bike and pedestrian connections through the subarea. City staff have identified trail and park system connectivity as a high priority throughout the city. In order to meet this objective, further identification of land to accommodate proposed parks and trail facilities is anticipated through this subarea planning process.

In addition to defined parks and trails, stakeholders would like to see balanced development that retains natural areas along the lake front, with commercial and light industrial uses further north. Policy recommendations and design standards to address the character and uses of the subarea should be included in the subarea final report.

Figure 6. Legacy Lands master plan map



2.3 CRITICAL AREAS AND ARCHAEOLOGICAL RESOURCES

Critical areas are ecologically sensitive and hazardous areas that the state and city have identified for certain development restrictions in order to protect their functions and values, while allowing for reasonable use of property. The Camas Municipal Code (CMC) identifies five types of critical areas: wetlands, fish and wildlife habitat conservation areas, geologically hazardous areas (steep slopes, erosion hazard areas, and seismic hazard areas), critical aquifer recharge areas (CARAs), and frequently flooded areas.

Several digital databases and online mapping tools were reviewed in late 2019 to identify mapped critical areas in the subarea. These resources include the National Wetland Inventory (NWI), Clark County Maps Online, Washington Department of

Natural Resources' (DNR) Forest Practices Application and Review System (FPARS), and Washington Department of Fish and Wildlife's (WDFW) Priority Habitat and Species list (PHS on the Web) and SalmonScape.

Based on a review of these resources, all five types of critical areas are present within the study area (see Figure 5). Approximately 50% (or 477 acres) of land within the study area contains critical areas. The amount of critical areas contained within the study area will affect future development, and the extent of critical areas must be considered as a concept plan for the subarea design. Furthermore, future development on specific properties will require the preparation of a critical areas report and compliance with critical areas regulations found in CMC 16.51 through 16.61, to protect critical areas.

2.3.1 Wetlands

NWI identifies several wetlands dispersed throughout the subarea, including freshwater ponds, freshwater emergent wetland habitat, and freshwater forested/shrub wetlands. The largest mapped wetland is located in the north of the subarea, identified as a forested/shrub wetland.

A site visit in the general area was previously conducted as part of the SR 500 and NW/NE 6th Avenue corridor project. BergerABAM (now WSP USA) scientists visited the project alignment corridors in April 2016 to evaluate the potential existence of wetlands and/or other waterbodies. The field observations were generally consistent with the NWI mapping, although some additional areas of potential wetlands were observed. Future development may require a formal wetland delineation and OHWM determination to determine functions and appropriate wetland and stream buffer widths during future permitting processes. If wetlands or wetland buffers are determined to be present, a critical areas report prepared by a professional ecologist or biologist will likely be required. The report will document how the development would achieve no net loss of wetland or buffer functions.

2.3.2 Frequently Flooded Areas

Frequently flooded areas are present in pockets along the south of the subarea, adjacent to Lacamas Lake and Round Lake, with the largest pocket occurring on vacant forested park land owned by the City. Development within the floodway or 100-year floodplain, which are defined as "special flood hazard areas" by the Federal Emergency Management Agency, will require compliance with CMC 16.57, Frequently Flooded Areas, and will likely require a floodplain permit.

2.3.3 Fish and Wildlife Habitat Conservation Areas

Aquatic and Riparian Habitat

The study area includes aquatic habitats (lakes, wetlands, and streams) and their associated riparian habitat, as well as state priority habitat and areas associated with state priority species (e.g., resident coastal cutthroat [*Oncorhynchus clarki*] in Lacamas Lake and Round Lake).

There are three unnamed streams mapped in the North Shore. A mapped stream runs across the north border of the subarea, connecting the large wetland to Lacamas Lake. While this stream is identified as a perennial Type F (fish-bearing) stream by DNR, it is not identified as fish habitat by PHS on the Web. In addition, both NWI and SalmonScape identify it as an intermittent stream.

The other two streams in the subarea are consistently identified as Type Ns (intermittent, non-fish-bearing). Per the critical areas ordinance, Type F, non-anadromous fish-bearing streams require a base buffer width of 74 feet, and Type Ns streams require 25 feet. Stream conditions will need to be verified on site during future permitting processes, and critical areas reports may be required to demonstrate no net loss of functions.

Terrestrial Habitat

The entire township and range in which the subarea is located is mapped by PHS on the Web as a “cave-rich area.” Per the WDFW, caves are a priority habitat feature, and not necessarily a priority habitat in and of itself. During the 2016 site visits, rock outcropping areas were observed, which included cavities, recesses, voids, and potentially interconnected passages. Whether caves are present on a given parcel would need to be site verified at the time development is proposed, with a professional opinion given as to the presence of priority habitat.

After the April 2016 site visits, scientists determined that given the lack of suitable habitat, no state or federally listed species or habitat for them were expected to occur within the SR 500 and NW/NE 6th Avenue project corridors, which transverse much of the subarea.

A small portion of the subarea, near the crossing of Lacamas Lake, is located within and/or adjacent to the Camas biodiversity corridor. According to the WDFW, the Camas biodiversity corridor supports mature timber and frequent observations of Vaux swifts (*Chaetura vauxi*).

The critical areas ordinance also identifies three habitats of local importance: (1) Oregon white oak (*Quercus garryana*), including snags, individual trees with a 20-inch diameter (or greater), and stands of trees greater than 1 acre; (2) fields of Camas lily (*Camassia quamash*) one quarter acre or more in size; and (3) areas identified as “natural open space” by the City’s PROS plan. PHS on the Web identifies several small areas mapped as oak woodland in the North Shore. Camas lily is not included in the PHS database as it is not a WDFW priority habitat. White oak habitat and Camas lily fields are known to exist in Lacamas Lake Park, just southeast of the subarea. The only natural open space in the subarea identified in the PROS plan is the City-owned property west of SR 500 and south of Leadbetter Road (parcel numbers 178099000 and 178253000). This open space is included in the Legacy Lands project.

2.3.4 Geologically Hazardous Areas

Geologically hazardous areas in the subarea include landslide hazard areas, seismic hazard areas, and erosion hazard areas, which are primarily located along the banks of

Lacamas Lake and Round Lake. DNR maps an active seismogenic fault⁴ along the north side of Lacamas Lake; however, the subarea is rated low on the National Earthquake Hazards Reduction Program (NEHRP) scale (site classes B and C), and most of the subarea is rated low for liquefaction susceptibility. The entire region is mapped by DNR as a volcano hazard zone for regional lava flows associated with an eruption event at Mount Adams.

Future development within geologically hazards areas require critical areas reports prepared by a registered geotechnical engineer or registered geologist. The reports would include an evaluation of the impacts of the geologic hazard area(s) on the proposed development, and recommendations for mitigation measures to protect human health and safety.

2.3.5 Critical Aquifer Recharge Areas

The majority of the subarea, as well as the general vicinity, is within a Category II CARA. A small Category I CARA, and associated Category II CARA, are located along Leadbetter Road. It is not anticipated that any land uses that constitute a high risk to aquifers would be proposed (e.g., chemical treatment storage). Future development activities may require hydrogeological assessments and would be required to demonstrate compliance with the city’s critical areas ordinance, as well as Washington Administrative Code (WAC) 173-218 and other applicable state and federal regulations.

2.3.6 Archaeological Resources

In addition to the critical areas described above, most of the study area is within an area of high to moderate-high probability of archaeological sites per the county’s Archaeological Predictive Model map. Future development will likely require the preparation of archaeological studies and compliance with CMC 16.35, Historic Preservation, to ensure identification, evaluation, and protection of cultural and historic resources in the city. Coordination with an archaeologist early in the development planning process is recommended.

2.4 UTILITY INFRASTRUCTURE AND CAPACITY

The subarea is currently underserved by public and private utilities. The subarea is largely underdeveloped with large parcels and are lack public services. The eastern edge of the subarea around NE Everett St/SR500 is served with utility infrastructure. The City recently extended critical backbone infrastructure for water and sewer systems through the subarea within SE Leadbetter Road through the North Shore Sewer Transmission System (NS-STs).

2.4.1 Sewer

Sanitary sewer service within the subarea will ultimately be provided by the City of Camas. Most of the subarea is currently undeveloped or served by septic tanks. Sewer infrastructure exists around the existing residential and commercial development

⁴ “Active” means that a fault has evidence for movement within the Holocene time period (beginning 12,000 years ago), and typically means that there are documented earthquakes (including small ones) on the fault.
<https://www.dnr.wa.gov/geology-glossary#.14>

around the NE Everett St/SR500 corridor. This area is served by the City’s STEP (septic tank effluent pump) system. The City also recently extended conventional gravity sewer and pump station type system along NE Leadbetter Road. The recently extended system is providing conventional service to Lacamas Lake Elementary and Camp Currie both located at the western extent of the subarea near NE 232nd Avenue.

The City completed a number of studies and recent sewer system construction to provide the backbone to serve the subarea. WSP (formerly BergerABAM) completed a planning study which included the subarea limits. The outcome of the sewer planning study identified that the subarea could largely be served by conventional gravity sewer and pump stations. This alternative was selected and ultimately the NS-STS was constructed in 2018.

The NS-STS constructed a backbone of sewer force mains, pump stations, and conventional gravity sewer along NE Leadbetter Road. The backbone was sized to accommodate 20-years of anticipated growth within the subarea assuming that new development within the subarea will extend from this system with gravity sewers.

The STEP system located around NE Everett St/SR500 has some remaining capacity within it for further development and densification. However, the STEP system is more costly to operate due to increased maintenance requirements, septic tank pumping, and maintenance/replacement of individual septic tank pumps. The City decided during development of NS-STS that conventional sewer is preferred to serve the subarea and further extension of the STEP system shall be limited to areas in which conventional systems cannot provide service.

2.4.2 Stormwater

Stormwater is currently managed locally throughout the subarea by each individual parcel/owner. Portions of publicly owned stormwater culverts exist at driveways and are scattered throughout the subarea. It is anticipated that future development will include stormwater detention/retention basins sized appropriately to handle stormwater runoff on a development by development basis.

The subarea is located within the Lacamas lake watershed and will require enhanced stormwater quality treatment. Lacamas Lake is currently listed on EPA and Washington State’s impaired waterbody 303(d) list for phosphorous. Stormwater treatment within the basin will need to provide enhanced water quality treatment and may potentially be subject to future total maximum daily loads (TMDLs), which may be forthcoming.

2.4.3 Water

Corollo Engineers Inc. completed an updated Water System Plan for the City of Camas. The updated Water System Plan provides planning to serve the subarea. The subarea is currently served similar to sewer by a backbone of a 12” diameter water transmission main located within NE Leadbetter Road. Water service will be extended throughout the area will require further redundant looping through a proposed future east/west connector likely in the future extension of North Shore Boulevard to NE 3rd Street. The City will need to continue to develop its source

supply, treatment and storage capacities in order to accommodate long term growth. Local transmission and distribution system can be extended from the existing City's backbone and transmission system.

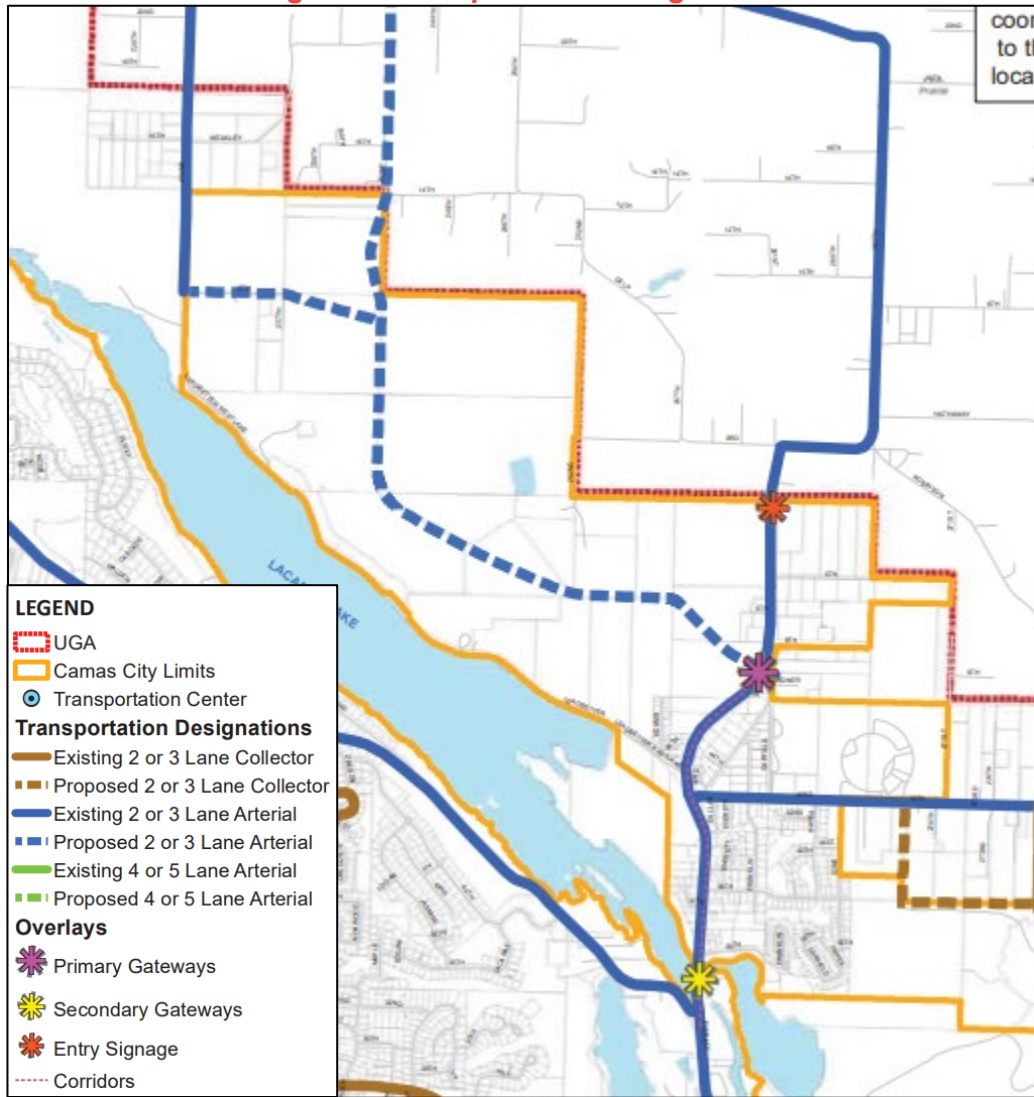
2.5 TRANSPORTATION NETWORK

As part of the existing conditions analysis, the City evaluated the existing transportation network, including pedestrian and bicycle facilities and planned transportation improvements.

2.5.1 Existing Transportation Network

The Transportation System Plan classifies existing and future roadways in the city as shown on Figure 7. These classifications will guide the facility cross sections and access spacing standards applied with future improvements. As illustrated, there is a lack of east-west facilities in the subarea. Leadbetter Road and Everett/SR 500 serve as the major north-south facilities. The Transportation System Plan identifies a proposed two or three arterial connecting Everett/SR 500 to the northwest corner of the subarea.

Figure 7. Transportation Designations



Pedestrian and bicycle infrastructure within the subarea is extremely limited, with sidewalks only available on some local roads in the south of the subarea and no existing bike lanes. Existing street cross sections require the construction of sidewalks and bicycle facilities in conjunction with future development. Below is a summary of key characteristics for roadways in the city. Through the subarea planning process, revisions to applicable cross sections may be proposed in order to achieve the character desired for streets within the North Shore subarea.

5-Lane Arterial

- 100-foot right-of-way
- 14-foot median
- 6-foot bike lanes
- Planter strip
- Sidewalks

- No on-street parking

3-Lane Collector/Arterial

- 74-foot right-of-way
- 12-foot median
- 5-foot bike lanes
- Planter strip
- Sidewalks
- No on-street parking

2-Lane Collector/Arterial

- 60-foot right-of-way
- 5-foot bike lanes
- Planter strip
- Sidewalks
- No on-street parking

2-Lane Local - Neighborhood

- 36-foot right-of-way
- No bike lanes
- Planter strip
- Sidewalks
- No on-street parking

2.5.2 Planned Improvements

The City's Six Year Transportation Improvement Program is updated each year and includes a map and list identifying the City's priority transportation projects for the next six years. Figure 8 and Table 3 identify the priority projects in the North Shore for the 2023 to 2026 period. The City Council's intent is to use this list as a prioritized framework to guide transportation decisions in coordination with the more detailed and technical Transportation System Plan.

Figure 8. 2023 – 2028 Six Year Street Priorities

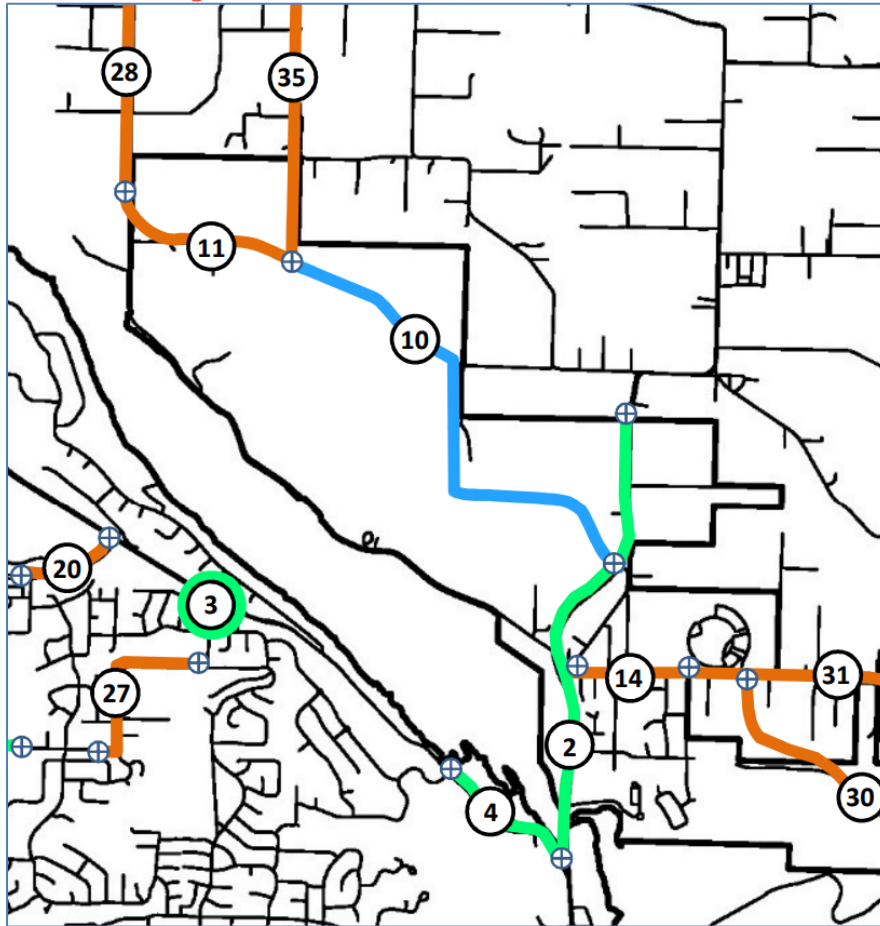


Table 3. 2023 – 2028 Six Year Street Priorities

Priority Number	Name and Description	From	To
2	SR-500 (Everett St./Rd.) <i>Widen with bike lanes, sidewalks, illumination, bridge replacement</i>	NW Lake Rd.	SE 4th St.
10	New North Shore E/W Arterial <i>New construction; Includes Critical Areas and Alignment Investigation</i>	NE North Shore Blvd.	Everett Rd.
11	NE Northshore Blvd <i>New construction; Includes Critical Areas and Alignment Investigation</i>	NE 232nd Ave.	NE 242nd Ave.
14	NE 43rd Avenue <i>Widen to 3 lanes with bike lanes, sidewalk</i>	SR 500	East City Limits
28	NE 232nd Avenue <i>Widen to 3 lanes with bike lanes, sidewalk</i>	NE 28th	NE North Shore Blvd.
35	NE 242nd Avenue <i>Widen to 3 lanes with bike lanes, sidewalk</i>	NE 28th St.	NE North Shore Blvd.

3.0 REGULATORY CONTEXT AND PLANNING FRAMEWORK

The existing policy and regulatory documents that will affect development within the study area include the Camas Comprehensive Plan (2016), the PROS Plan (2014), and the CMC, particularly Title 17 – Land Development and Title 18 – Zoning. Based on the initial stakeholder interviews and discussions with City staff, it is anticipated that development within the study area will include a mix of residential, office, and commercial uses. The sections below evaluate the current land use policies and development standards relevant to addressing this type of development.

3.1 CAMAS COMPREHENSIVE PLAN

The City updated their citywide comprehensive plan, titled “Camas 2035,” in 2016. Several comprehensive plan policies support the subarea planning process, along with the development of a mix of uses within the subarea plan boundary. However, comprehensive plan policy amendments will likely be required to ensure consistency with the anticipated development pattern within the subarea. Stakeholders have expressed an interest in maintaining the natural character of the subarea and retaining larger expanses of open space. Policy recommendations to support the subarea concept plan should be included in the final subarea plan report.

Future development within the study area must be consistent with the city’s comprehensive plan, which will necessitate that the comprehensive plan be updated to incorporate policy amendments that are developed under the North Shore subarea plan, and the subarea plan should be adopted by reference into the comprehensive plan. Furthermore, as allowed by state law, subarea plans can be implemented through a planned action ordinance. A planned action ordinance typically includes an environmental impact statement that considers the impacts of all projects proposed within the subarea plan.

Relevant comprehensive plan goals and policies include:

Land Use

LU1.1 – Maintain a land use pattern that respects the natural environment and existing uses while accommodating a mix of housing and employment opportunities to meet the City’s growth projections. Ensure the appropriate mix of commercial-, residential-, and industrial-zoned land to accommodate the City’s share of the regional population and employment projections for the 20-year planning horizon.

LU-2.2: Support village-style employment and retail development in the North Shore area to serve the growing population. Discourage strip developments.

LU-2.5: Ensure industrial development and other employment lands are compatible with adjacent neighborhoods through development and landscaping regulations and design review.

LU-2.7: Protect employment land from conversion to residential uses in order to ensure an adequate supply of commercial and industrial land to meet 20-year employment projections.

LU-3.1: Encourage a variety of housing typologies to support the overall density goal of six dwelling units per acre.

LU-3.5: Where neighborhoods adjoin natural areas or trails, ensure connections through neighborhoods to enhance access to recreation amenities.

LU-4.2: Support the purchase by the City, or the dedication and preservation by private owners, of open space and encourage careful consideration and integration of the natural environment in any planning activity to perpetuate the park-like setting of Camas.

The land use policies for the city generally promote walkable neighborhood environments and a balance of residential and employment land uses. The North Shore subarea plan is an opportunity for the City to evaluate these land uses and establish the appropriate mix of uses.

Housing

H-1.4: Require a percentage of newly created lots to include one or more of the following unit types (to be designated on the face of the plat):

- *Single-story dwellings*
- *Barrier-free dwellings (consistent with Americans with Disabilities Act [ADA] guidelines)*
- *ADUs, to be constructed concurrent with primary dwellings*

H-2.1: Support and encourage a wide variety of housing types throughout the City to provide choice, diversity, and affordability and promote homeownership.

H-2.3: Any comprehensive plan designation change that increases residential capacity should require a quarter (25 percent) of the new units to be affordable to households earning 50 to 80 percent of Camas' MHI at the time of development.

The North Shore subarea plan should support the policies to provide residential land to meet the city's anticipated population growth while balancing the need for employment lands.

Economic Development

North Shore Economic Development

ED 4: To encourage master planning that allows a more intense level of development, well-served by transportation options and includes facilities for pedestrian and bicycle travel, a range of housing choices, and a mix of shops, services, and public spaces.

ED-4.1: Promote the growth of businesses such as grocery stores, medical offices, and restaurants that will meet the retail and service needs of the population.

ED-4.2: Protect the viability of the airport as a significant economic resource to the community by encouraging compatible land uses⁵ and densities, and reducing hazards that may endanger the lives and property of the public and aviation users consistent with state laws RCW 36.70A.510 and RCW 36.70.547.

⁵ Refer to "Airport and Compatible Land-Use Program Guidebook," Washington State Department of Transportation; available online at <http://www.wsdot.wa.gov/aviation/Planning/ACLUguide.htm>.

ED-4.3: Encourage new developments to include provisions for neighborhood parks that are within walking and biking distance of a person's home or work to encourage greater physical activity, including shared-use paths (or trails) that link homes, work and commercial centers, public transit, and community facilities.

ED-4.4: Promote economic development opportunities adjacent to the Port of Camas-Washougal's Grove Field that will benefit from additional transportation options.

ED-4.5: Preserve large tracts of land for large industry and master-planned commercial development.

ED-4.6: Support public-private partnerships for infrastructure development.

ED-4.7: Advocate better transit routes and service.

Gateways and Corridors Economic Development

ED-6.2: Ensure zoning regulations and design standards promote development/redevelopment in gateways that include the gateway and corridor overlay features identified in the Land Use Element and the Camas Design Review Manual.

ED-6.3: Coordinate gateway and corridor development/redevelopment with Public Works planning to leverage resources and ensure adequate right-of-way is available for gateway/corridor improvements.

As outlined in the Land Use Element of the comprehensive plan, gateways are established as an overlay zone and identified on the Camas zoning map. The North Shore subarea contains a primary gateway at the intersection of SR 500 and NE Everett Drive, and a secondary gateway to the south where SR 500 crosses Lacamas Lake.

Natural Environment

NE-1.5: Protect, conserve, and manage existing natural resources and valuable historic and cultural areas in order to ensure their long-term preservation.

NE-1.6: Encourage the preservation of the night sky through dark sky standards in development regulations and design guidelines.

NE-2.4: Regulate land use and development so as to protect natural topographic, geologic, vegetative, and hydrologic features.

SMP-3.3: To ensure, at minimum, no net loss of shoreline ecological functions and processes and to plan for restoring shorelines that have been impaired or degraded.

Natural resources in the subarea include shorelines, Lacamas Lake, streams, and fish and wildlife habitat areas. By protecting these resources in this area, the North Shore subarea plan will support these natural environment policies, and in turn support the comprehensive plan.

Transportation

T-1.3: Construct streets that are interconnected and avoid long cul-de-sacs or dead ends. Block lengths should be less than 1,000 feet.

T-1.6: Minimize access to new development and redevelopment along the City’s arterials, and consolidate access points when spacing is insufficient.

T-2.5: Coordinate with schools and the community to designate safe pedestrian and bicycle routes between residential areas, schools, and public facilities.

T-3.1: Coordinate with local municipalities, the Washington State Department of Transportation, adjacent counties, and C-TRAN to ensure that minimum roadway and multi-modal design standards are consistent.

Off-street trails for pedestrian and bicycle use should be included in the concept plan for the North Shore subarea. The trails will provide connections within the subarea to Lacamas Lake and connect to the city’s existing trail system outside the subarea.

3.2 SHORELINE MASTER PROGRAM

Portions of the subarea are located in shoreline jurisdiction associated with Lacamas Lake and Round Lake. Shoreline environment designations along Lacamas Lake consist primarily of Urban Conservancy, with two stretches of shoreline designated as Medium Intensity (see Figure 5). Development within shorelines will need to demonstrate compliance with SMP policies, including meeting the purpose of the shoreline designations, which are as follows.

The purpose of the “Urban Conservancy” shoreline designation is to protect and restore ecological functions of open space, floodplains, and other sensitive lands, where they exist in urban and developed settings, while allowing a variety of compatible uses.

The purpose of the “Medium Intensity” shoreline designation is to accommodate primarily residential development and appurtenant structures, but to also allow other types of development that are consistent with this chapter. An additional purpose is to provide appropriate public access and recreational uses.

The SMP also states that the Medium Intensity shoreline designation in the northeast portion of Lacamas Lake is intended to “provide a center for mixed-use development that will include water-dependent and water-oriented uses that increase the public’s ability to enjoy public waters and may include residential use in mixed use proposal.” In addition, the SMP notes that in order to mitigate impacts from development, “Leadbetter Road should be relocated further from the shoreline and a continuous buffer of native vegetation provided, if feasible. Public access should be provided throughout the shoreline area.”

Future development in shoreline jurisdiction will be required to demonstrate compliance with the SMP and will likely require a shoreline permit.

3.3 DEVELOPMENT AND ZONING CODES

The following sections address the adequacy of the CMC to support the types of development anticipated within the study areas.

3.3.1 Authorized Uses (CMC Chapter 18.07)

Uses allowed in each zone are outlined below in Table 4. These uses are either permitted outright (P), allowed as a conditional use, through a conditional use permit (C), or are prohibited in that zone (X).

Likely or anticipated uses were identified based on existing development in the city and stakeholder feedback on preferred uses. It is possible that additional uses will be identified as the project progresses and additional stakeholder feedback is collected.

Table 4. Uses by Zone

Use ⁴	Zone			
	R	MF	CC	BP
Single-Family Residential (detached)	P	P	X	X
Single-Family Residential (attached)	X/P ¹	P	X	X
Duplex	C	P	X	X
Apartments	P ¹	P	X/P ²	X
Accessory dwelling unit	P	P	X	X
Home Occupation	P	P	P	X
Open Space, Park or Trail	P	P	P	P
Sports Fields	C	C	P	P
High Tech Industry	X	X	C	P
Professional office(s)	X	X	P	P
Restaurant	X	X	P	P
Grocery, large scale ³	X	X	C	C
Grocery, small scale ³	X	X	C	P
Banks, savings and loan	X	X	P	P
Gas/fuel station	X	X	C	P

¹ Permitted in the R zones as part of a planned development only.

² On tracts ten acres or more, subject to approval by city council of a master plan and development agreement, a mixed-use development may be approved provided no less than 51% of the net developable acreage is committed to commercial uses.

³ If grocery store is less than one hundred thousand square feet then use is outright permitted. If one hundred thousand square feet or over then a conditional use permit is required.

⁴ For a complete list of land uses, see CMC Sections 18.07.030 Table 1 and 18.07.040 Table 2

As a concept plan is developed through this subarea plan process, the limitations and conditions identified above are important to consider.

3.3.2 Airport Overlay Zoning (CMC Chapter 18.34)

The purpose of the airport overlay zone is to regulate the use of property and to regulate and restrict the height of structures and objects of natural growth in the vicinity of the Grove Field Airport. The overlay zone takes into account the need to protect the approaches to the airport from incompatible land uses that would limit or adversely affect the airport's ability to serve its present and future air transportation needs. A majority of the subarea (687 acres) lies within Airport Overlay Zone C, with

smaller portions within Zone A (30 acres) and Zone B (40 acres). Within any zone, building heights are restricted to 150 feet in height, and any proposed structure over 100 feet requires an obstruction evaluation letter (Form 7460-1) from the Federal Aviation Administration (FAA). It should be noted that the North Shore lies at a substantially lower elevation than the airport, which will help ameliorate concerns from the FAA. It is not anticipated that proposed buildings would intrude into restricted airspace.

In addition to the limitations on development and uses contained in the underlying zone, additional development standards are required within the three zones. In Zone C, most uses permitted in the underlying zoning are allowed, although it is recommended that the owner be informed of construction or remodeling techniques that would decrease the noise associated with airport operation. Additional, more restrictive prohibited uses for Zones A and B will apply to a smaller area (70 acres) in the north of the subarea.

3.3.3 Business Park (CMC Chapter 18.37)

Approximately 312 acres of the subarea are zoned BP. Per the CMC, the BP district is intended to provide for employment growth in the city by protecting industrial areas for future employment. Design of business park facilities in the BP district are required to be “campus-style,” with landscaped buffers and architectural features compatible with, and not offensive to, surrounding uses.

3.3.4 Planned Residential Development (CMC Chapter 18.23)

The purpose of the PRD ordinance is to facilitate the innovative development of land and to provide greater flexibility in the development of residential lots in medium and high density districts. A further purpose is to allow for the modification of certain regulations when it can be demonstrated that such modification would result in a development that would not increase the density and intensity of land use; would preserve or create features or facilities of benefit to the community, such as open space or active recreational facilities; would be compatible with surrounding development; and would conform to the goals and policies of the city’s comprehensive plan.

The PRD process is an optional process for developments. The requirements and standards set forth in the PRD ordinance encourage well-designed communities that include a mix of single-family and multifamily residential buildings. Permitted or conditional uses currently listed in the applicable zoning classification are permitted within a PRD.

The existing PRD ordinance may be effective in developing higher density residential areas within the subarea if they do not negatively impact adjacent low density uses, such as agriculture and large-lot residential. Within the framework of the PRD ordinance, density and development rights transfers are tools that could also be considered to encourage property owner coordination and allow for greater protection of critical areas and open space. Per CMC 18.09.060, density transfers are allowed in all residential zones to achieve the density goals of the comprehensive plan while preserving environmentally sensitive lands. The City could consider additional

standards to allow density transfers in other zoning districts within North Shore to further encourage the preservation of critical areas, trees, and open spaces.

3.4 PARKS, RECREATION, AND OPEN SPACE COMPREHENSIVE PLAN

The PROS plan, updated in December 2014, outlines a community vision for Camas that includes a high-quality park and recreation system, with a comprehensive trail system linking all recreational sites to the regional trail network.

As described in the PROS plan, two potential park sites have been identified within the study area. One is a proposed neighborhood park (NP-17) in the northwest corner of the subarea, just east of Camp Currie, and the second is the proposed Camas sports field complex (SU-13) further south. Per the PROS plan, the sports field complex would concentrate on competitive-level play and offset some of the demand for sports field use in other areas of the city. Several proposed trails are planned to traverse the study area, including the East Camas Regional Trail 1 (T-3), a proposed trail running along the north shore of Lacamas Lake and connecting Lacamas Park, Camp Currie, and the County’s Green Mountain Trail heading north. Other planned trails include North Camas 1, 2, and 3 (T-27, T-28, and T-32), which are envisioned in the PROS plan as providing trail connections between Lacamas Lake and future land uses in the North Shore.

The PROS plan also identified three planned trailheads in the subarea. Trailheads Y (sports field complex) and V2 (Lacamas Lake Trail 3) are proposed primary trailheads, which would include both dedicated parking and restrooms, and trailhead U (Lacamas Lake Trail 1), which is proposed as a secondary trailhead (trail access but no restrooms).

Parks and recreational opportunities in Camas include neighborhood parks located to serve individual neighborhoods, natural open space areas that preserve resources throughout the community, and special use areas to provide for specific recreation needs. Supplementing these sites are public and private sites and facilities, such as school sites, regional parks, and privately-owned recreation facilities.

In order to meet the policies and standards outlined in the PROS plan, park and trail connection locations should be further identified through this subarea planning process.

4.0 KEY CONSIDERATIONS FOR SUBAREA PLAN

The subarea plan will define a vision and map out a route to its realization—in this case, a vision that celebrates the distinguishing characteristics of the North Shore while reflecting the priorities of the Camas community at-large. A summary of key considerations for the subarea plan, based on the existing conditions analysis, follows below.

Land Use and Zoning

- Adopt the North Shore subarea plan by reference into the Camas comprehensive plan in order to ensure future development within the study area adheres to the goals and objectives established through the subarea planning process.

- Accommodate the Washington State Office of Financial Management (OFM) forecasted population growth by planning for a variety of housing and employment lands that will serve a range of incomes and education levels.
- Establish a sense of place through the development of design standards for streetscapes, lighting, signs, and architecture.
- As the subarea concept plan is developed, analyze planned capital improvements to address the anticipated increase in population and jobs.
- Consider North Shore-specific zoning and development standards (such as density transfers beyond residential zones or other bonuses) to address the unique conditions of the North Shore and encourage greater preservation of natural areas and open space.

Parks, Trails and Open Space

- City staff have identified trail and park system connectivity as a high priority throughout the city. In order to meet this objective, identify land to accommodate proposed neighborhood parks and trail facilities through the subarea plan process.
- Coordinate the evaluation and identification of park needs in the subarea plan with the planned parks and open spaces identified for the Legacy Lands project.
- Supply sufficient parks, open spaces, and trails to balance out the new growth and provide community access to both local and regional recreational opportunities.
- Develop a useable open space network that will support quality of life attributes including walkability and access to the outdoors.
- Maintain open space around Lacamas Lake to the extent practicable and provide connections to the planned trail around the lake.

Critical Areas

- The study area includes approximately 477 acres of critical areas, including wetlands, streams, riparian habitat conservation areas, steep slopes, and a Category II CARA. The extent of critical areas contained within the study area will affect future development and must be considered as a subarea concept plan is developed.
- Consistent with the Critical Areas Ordinance, , development of properties with critical areas will require a critical areas report prior to development, with a priority to avoid impacts.
- Future development will likely require an archaeological study. Coordination with an archaeologist early in the development planning process is recommended.

Shorelines

- Future development in shoreline areas will need to demonstrate compliance with the city's SMP and will likely require shoreline permits.
- The subarea plan should reflect the SMP's vision for the Medium Intensity shoreline on the northeast portion of Lacamas Lake as "a center for mixed-use

development that will include water-dependent and water-oriented uses that increase the public’s ability to enjoy public waters and may include residential use in mixed-use proposal.”

- Provide opportunities for public access throughout the shoreline area of Lacamas Lake.

Utility Infrastructure and Capacity

- Extension of services will occur in conjunction with development.

Transportation Network and Capacity

- Consider anticipated growth and development when identifying transportation improvements.
- Include active transportation facilities (e.g., bike lanes on roadways, separated trails and pathways) on new roadways to improve safety and provide a variety of transportation options.

5.0 NEXT STEPS

This existing conditions, opportunities, and constraints analysis will be part of the information used to inform the vision for the North Shore (Phase 1) and develop concept plans to be included in the North Shore subarea plan (Phase 2).

6.0 REFERENCES

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Memorandum

Date March 2020
To Don Hardy and Nicole McDermott, WSP
From Brian Vanneman and Sam Brookham, Leland Consulting Group
Subject Market Analysis
Project Camas North Shore Subarea Plan

Introduction

The City of Camas is beginning to work on the North Shore Subarea Plan. The subarea plan will answer two fundamental questions: What will the North Shore area be in 20 years and what is the path to get there?

Today, the North Shore area consists of agricultural land and single-family residences with large, rural acreages. Current zoning supports a range of uses including employment, multifamily and single-family residential, commercial services, and parks and open spaces. The City anticipates significant growth and redevelopment in the North Shore area over the next 20 years. Therefore, it is important to take a comprehensive look at allowed uses and the infrastructure (streets and utilities) required to support future development.

Objectives

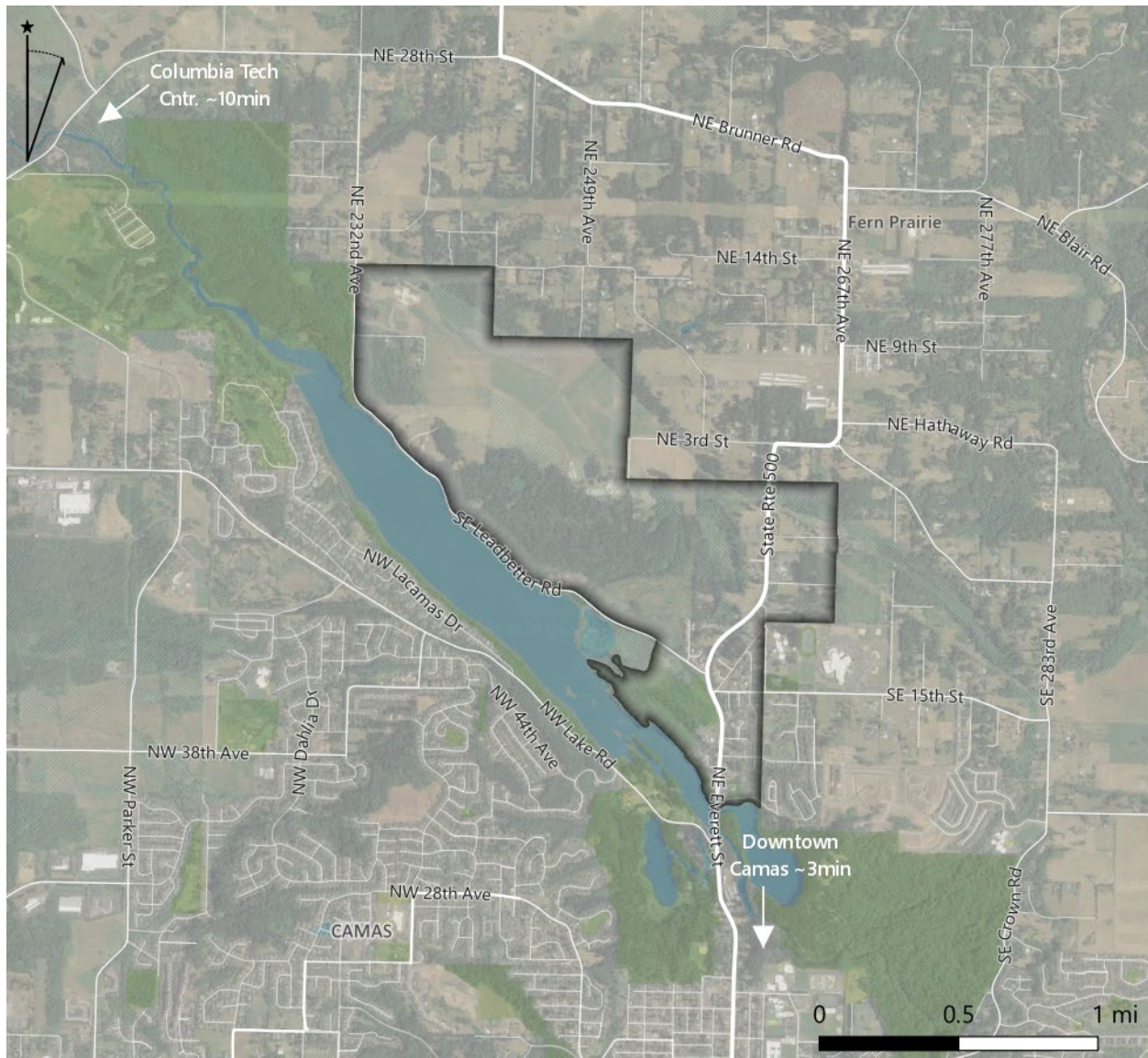
- Balance development with the preservation of natural resources,
- Ensure development on the north side of the lake includes a diversity of land uses,
- Provide access to recreation and new parks and trails,
- Encourage smaller-scale commercial,
- Foster employment-generating uses on non-residential lands,
- Promote multifamily over single-family residential, and
- Consider the proximity to the high school from a use and traffic standpoint.

This market analysis aims to establish the opportunities and constraints of the Camas North Shore in order to balance these goals with market realities.

STUDY AREA

The North Shore Subarea is generally bounded by Lacamas Lake to the south, the city limits to the north, Northeast 232nd Avenue to the west, and Everett Street to the east. The plan area includes the North Shore land that was annexed into the city in 2008.

Figure 1. Camas North Shore Area



Source: Leland Consulting Group

PURPOSE OF THIS MARKET ANALYSIS

Leland Consulting Group (LCG) prepared this market analysis to identify opportunities and constraints in the North Shore area and to ensure that the strategies identified in the subarea plan are grounded in market realities.

LCG's Market Analysis report summarizes the economic and demographic existing conditions and trends impacting the North Shore and includes a demand analysis for employment (office and industrial), housing, and commercial (e.g., retail) uses. This is a "broad brush" analysis that identifies the types of employment, commercial, and residential land uses that are likely to be feasible versus those that probably not feasible.

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Executive Summary

The City of Camas anticipates substantial growth in the Camas North Shore area over the next 20-years. Planned transportation infrastructure will improve transportation connectivity throughout the City and support the employment and retail uses desired in the North Shore area. A large portion of the land in this area is zoned Business Park and Multi-Family, with some Commercial and lower density residential zoning. The Port of Camas-Washougal manages an airport that is outside City limits, but most of the developable land in the North Shore area is within the airport influence area.

The City's economic development goal of the North Shore area is to encourage master planning that allows a more intense level of development, well-served by transportation options and includes facilities for pedestrian and bicycle travel, a range of housing choices, and a mix of shops, services, and public spaces.

The policies that support this goal include:

- **Promote the growth of businesses** such as grocery stores, medical offices, and restaurants that will meet the retail and service needs of the population.
- **Protect the viability of the airport as a significant economic resource** to the community by encouraging compatible land uses and densities and reducing hazards that may endanger the lives and property of the public and aviation users.
- **Encourage new developments to include provisions for neighborhood parks** that are within walking and biking distance of a person's home or work to encourage greater physical activity, including shared-use paths (or trails) that link homes, work and commercial centers, public transit, and community facilities.
- **Promote economic development opportunities** adjacent to the Port of Camas-Washougal's Grove Field that will benefit from additional transportation options.
- **Preserve large tracts of land for large industry** and master-planned commercial development.
- **Support public-private partnerships** for infrastructure development.
- **Advocate for better transit routes and service.**

OPPORTUNITIES AND STRENGTHS

- **Supportive demographic characteristics.** Demographic data shows highly educated, high-income, and large-sized households for both the City of Camas and the surrounding region. These characteristics are likely attractive for residential and retail developers.
- **Strong residential growth.** There is a strong regional market for housing, driven largely by substantial population growth. Continuing with this trend, Clark County is projected to experience population growth at about 1.4 percent annually over the next two decades. Historically, east Clark County has experienced faster growth than the broader region—a trend that can be expected to continue. This growth is likely to manifest in substantial new single-family, townhome, and multifamily development, which will in turn further support additional neighborhood-supporting retail development.
- **Strong regional market for employment uses.** The Portland market is one of the top growing high-tech job markets in the nation. With more than 78,300 jobs and record low unemployment, Portland not only offers an expanding tech market but continues to be a prime West Coast location for tech expansion and innovation. Office space remains in very high demand across the metro region, and particularly in Clark County. Indeed, there has been positive net absorption in at least three out of four quarters each year from 2010 onward.
- **Nearby employment-based projects demonstrate positive trends.** The buildout of the Columbia Tech Center, for example, which is approximately double the size of the net developable acres designated for industrial development in the North Shore. Construction began in CTC in 1997 (16 years after HP was built) and total build-out is expected in 2024. Currently, there is about 4.4 million square feet of standing inventory, relatively evenly split between land uses.
- **Supportive property owners.** A key factor that enables plans to become reality is property owners that support the vision for the area. The Camas North Shore, for the most part, has property owners who have expressed interest in developing their property, providing a foundation on which to build a positive, implementable, and enduring plan.
- **Large, developable land tracts.** There are few areas within the Portland metro region with developable land tracts of this scale, which is likely to be attractive to businesses looking for substantial greenfield sites.
- **Aesthetically attractive location and high quality of life.** Camas has experienced significant population growth, with families and other residents attracted to a certain lifestyle in an aesthetically pleasing environment.
- **Suburban opportunities are increasing.** Construction and redevelopment have remained key topics for Portland office properties with construction found throughout the region. This new development has made way for expansion in prime submarkets along with bringing new life to historic buildings that are staples in the market.

CONSTRAINTS AND WEAKNESSES

- **Challenging access.** With so few access points to and from the Camas North Shore area, significant development of any land use will require major upgrades to the capacity and connectivity in the area.
- **Lack of existing infrastructure.** The vast majority of the North Shore area is a greenfield site with very little existing utility or transportation infrastructure. In order for the City to attract a major user to the

site, the city must be prepared to make substantial upfront investments given the other challenges facing the site and surrounding area.

- **Presence of development impediments.** Steep slope, existing right-of-way, wetlands, utility easements, and tree groves are among the physical and regulatory barriers to development in the area. Redevelopment of existing structures is unlikely, other than in a handful of appropriate, high-activity nodes.
- **Lack of existing amenities.** Many prospective office and industrial businesses place a high value on locations that offer their employees a range of amenities because these are prized by potential employees. Some examples include high capacity roadways and transit, walking and biking trails, parks, and places to dine and shop. These amenities are currently lacking in the area, although these amenities could be planned for and developed through implementation of the subarea plan; in addition, downtown Camas is nearby, where some of these amenities already exist.
- **Availability of more centrally-located, development-ready employment land.** The Columbia Tech Center, Section 30 (English Pit), Columbia Palisades, and other projects in east Clark County are likely to be more competitive than the North Shore for most development types due to accessibility, location, and development readiness, among other reasons.
- **High construction costs.** Despite the global collapse of commodity prices, local prices of construction materials have not fallen. The size of the construction workforce also remains well below pre-recession levels, which has led to labor shortages in several major markets. Growth in multifamily construction activity is partially offsetting the steep decline in single-family homebuilding compared with the last cycle, driving up construction costs.
- **Retail challenges.** Given the lack of existing rooftops, the surrounding area's lower-density housing inventory, competition from competitive commercial areas to the west and south, it will be potentially challenging to attract new retailers. However, with the Comp Plan vision for the area outlining small- and moderate-scale retail development to simply provide amenities for residents and employees, this is unlikely to be a significant burden.
- **Development Cycles.** Some economists are predicting a recession in the next two years. This could slow development of the subarea in the near term, although it will not impede development of the subarea over the 20-year planning timeframe.

DEVELOPMENT PROGRAM

The table below provides an overview of total market-area demand and the estimated amount that the North Shore could capture, as well as the rationale for this capture rate. It should be noted that these numbers are largely based on demand and the North Shore's regional competitiveness, and certain City actions may elevate this market share above what is proposed below.

Table 1. 20-year Development Program

Land Use	Market Area Demand	North Shore Est. Capture	Capture Rationale
Single-Family Residential	33,260 units	881 units	The Camas North Shore area could conceivably capture significantly more of market area demand for single-family uses given both the strength of the residential market and the fact that single-family detached units are also permitted in multifamily zones. However, as a low-density use, additional development greatly limits the capacity of the area to accommodate other uses. Industrial employment lands become especially difficult due to the incompatibility between industrial and residential uses.
Multifamily Residential	14,430 units	1,028 units	Most of the multifamily growth in the submarket has been further west, and several projects are expected to be built before anything is built in the North Shore area. With that said, the North Shore is likely an attractive location for senior housing, which could increase the overall market capture if very successful.
Employment Office/ Industrial	3.4 million sf	1.4 million sf	Current concepts for the industrial area of the North Shore (provided by an existing property owner) total approximately 2.1 million square feet, shared between industrial, office, and flex. This is expected to be total square footage at full build-out in the land designation for industrial development. Over the next 20 years, 1.4 million square feet is a more reasonable assumption based on construction and absorption trends in east Clark County. In fact, market area demand may increase depending on the state of the economy and actual industry growth.
Retail	764,000 sf	240,000 sf	Due to its location on the urban edge of the metropolitan region, lack of visibility and challenging access, lack of existing households, and the prominent retail services available nearby to the west, the North Shore is not likely to be a major retail center; retail at a neighborhood scale is more likely. There will be demand for small-scale retail along the perimeter arterial to serve new development and the adjoining neighborhood. Retail will primarily be driven by the pace of residential development, both in the immediate North Shore vicinity and in the broader east Clark County region. Therefore, most retail development is likely to follow major residential and employment development.
Other	N/A	N/A	Lodging (hotel), parks, sports and recreational facilities, public uses (services, libraries, etc.) and other specialty uses are anticipated as employment and population growth occurs in and around the North Shore.

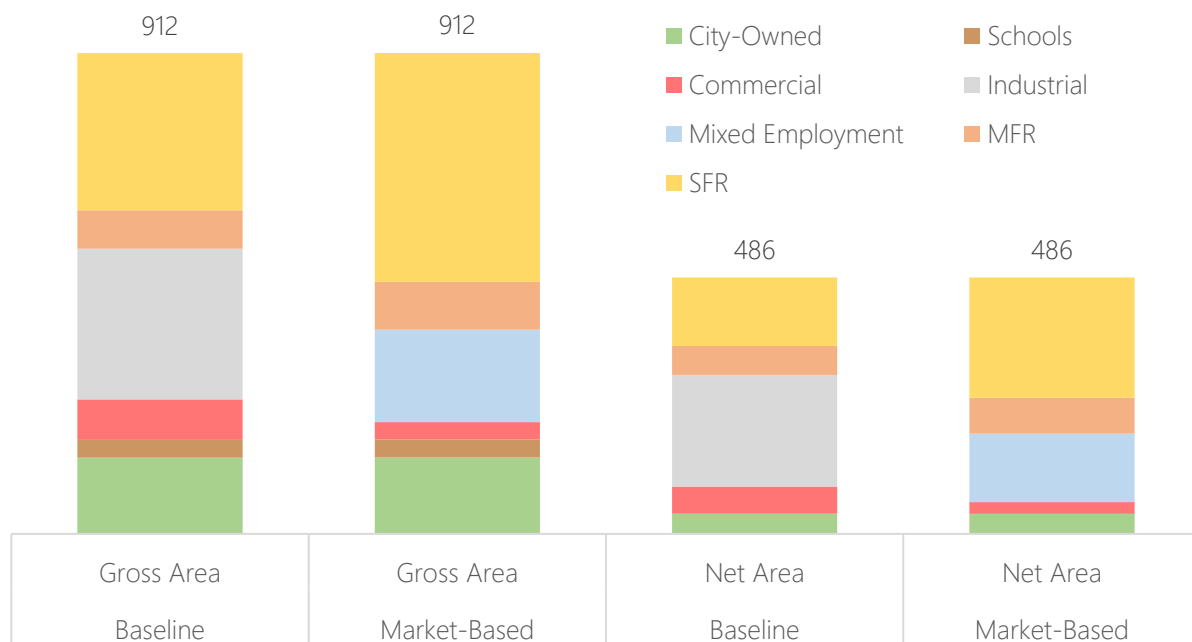
Source: Leland Consulting Group

Land Use Scenarios

It is important to explore the existing land use designations in the North Shore area to decide whether these designations are appropriate given the market-driven development program on the previous page.

The following chart in Figure 2 shows “gross” and “net developable” acreage for two development scenarios. The gross area is the entire study area; in order to calculate the net developable area, we have deducted the considerable areas dedicated to utility easements, sloped land, wetlands, right-of-way, existing developed properties, and other development impediments from the gross area. The “baseline” scenario reflects the acreage as designated in the existing comprehensive plan, while an alternative “market-based” land use program is based on Leland Consulting Group’s assessment of the market and the specific opportunities in the North Shore area.

Figure 2. “Baseline” Development Scenario by Land Use, Gross and Net Developable Acreage



Source: Leland Consulting Group

Note: The City-Owned category includes properties purchased by the City with the intent to preserve the land for parks, recreation, and natural areas. Approximately 25 percent of the land is expected to be developed with community-serving amenities and the rest preserved as natural areas.

Key takeaways from the baseline scenario include:

- The North Shore is approximately 912 gross acres in size, of which there are about 486 net developable acres due to development impediments, existing developments, and other restrictions. Currently, the Comprehensive Plan designates a majority of land for employment-based land use, such as industrial, office, and flex.
- Approximately one-third (298 acres) of gross acreage and one-quarter (130 acres) of net developable acreage is designated low-density single-family residential, and an additional 73 acres (55 net acres) is designated for multifamily, which also allows single-family at a minimum of 6 units per acre.
- Commercial accounts for about eight percent of gross acreage and 11 percent of net.

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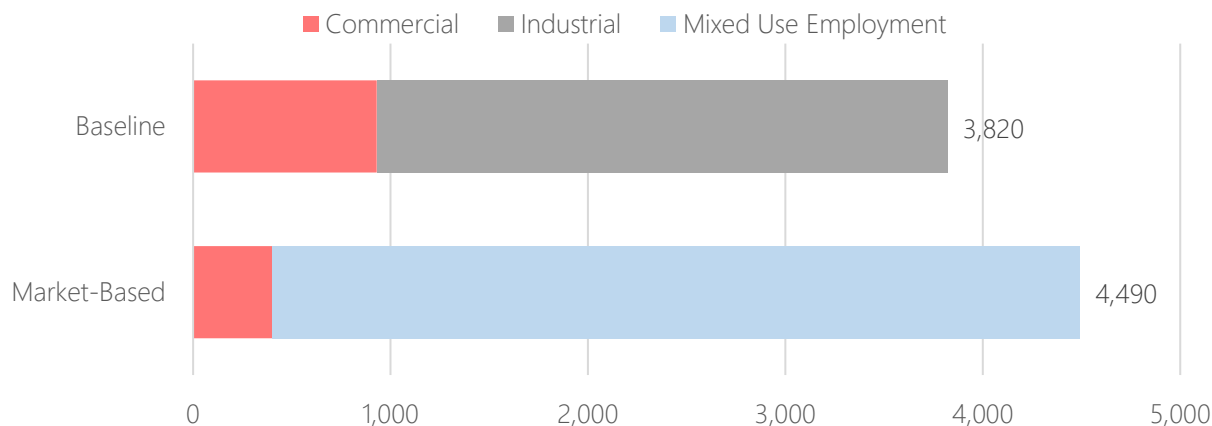
Key takeaways from the market-based scenario include:

- A more flexible employment-based scenario that allows a greater diversity of uses, such as retail and multifamily residential, is recommended.
- A strong residential market and near-term development opportunities suggest a need to increase the residential program. Given the feasibility challenges and lack of near-term demand for new industrial and commercial development in the North Shore, an increased residential program may act as an incentive for developers and investors to develop a mix of uses in the area. Simply speaking, being able to sell off land for near-term residential development will help fund alternative uses, such as industrial, office, and retail.
- The desire for smaller-scale neighborhood-oriented retail and a relatively small capture rate of market area retail demand suggests a lesser need for land for retail.

The following chart in Figure 3 shows the potential jobs generated under each of these two development scenarios.

- LCG used industry standard job density data to calculate these job projections. Based on a review of WAESD and LEHD data, it appears that about six office-using jobs (averaging 350 square feet per employee) will be created in the market area for every industrial job (averaging 800 square feet per employee).
- Despite 130 net acres of employment-based land in the market-based scenario versus 212 net acres in the baseline scenario, the market-based scenario is projected to generate approximately 18 percent more jobs. This is largely due to the higher employment density and floor-area ratio of mixed-use employment (415 square feet per employee and 0.30 FAR) versus traditional industrial (800 square feet per employee and 0.25 FAR). Significantly fewer commercial jobs are generated in the market-based scenario because of the reduction of the commercial net acreage from 51 to 22.
- These higher density “mixed employment” jobs are generally trending in this part of the county. The Columbia Tech Center and proposed Section 30 developments serve as good examples of the land use mix, density, size, and development rate that the North Shore could achieve. These are best reflected in the market-based scenario.
- Traditional industrial-focused industries with lower-density jobs, such as transportation and warehousing, which are typically at least 1,000 square feet per employee, are much less likely to locate in the North Shore area and may not be best suited to collocate with other land uses. Higher-density industrial-focused industries such as manufacturing, on the other hand, may collocate with office, retail, and even housing, to an extent.

Figure 3. Potential Job Generation by Development Scenario



Source: Leland Consulting Group

NORTH SHORE RECOMMENDATIONS

- Encourage fine grain mixing of land uses throughout the subarea rather than a large-scale block pattern. In general, place multifamily land adjacent to commercial and employment areas, with single family zoned land at the fringe of development.
- Be flexible with zoning designations to allow developers to respond to the market. Specifically, allow a broader set of land uses within the industrial/business park area.
- Assuming employment remains the primary focus, think long-term (i.e. longer than the current 20-year planning horizon) for total build out in the North Shore area.
- In the next phase of planning, determine how transportation connections that are sufficient to serve approximately 1.4 million square feet of employment space can be built. This should include the locations of connections and size of proposed facilities. Transit should be a part of transportation recommendations.
- Focus major retail/commercial uses along primary arterials and key nodes and recognize that a majority of these uses are likely to follow employment and residential development.
- Allow but do not require “vertical mixed-use” (e.g., residential over retail, office over retail). Encourage “horizontal mixed-use”—i.e., commercial and residential uses being built side by side.

Potential Actions

In order to achieve either Option, the City may elect to undertake the following actions. Some of these may be completed during Phase 2 of this study.

- Changes to the City’s Comprehensive Plan and Zoning Code regulations
- Work with Property owners to complete more detailed Master Plans for specific parts of the study area;
- Define Infrastructure Funding Plans that may include public and private funding sources, and “district funding” sources such as a local improvement district;
- Establish Development Agreement(s) with individual developers and/or property owners, or groups of developers and property owners. These agreements may include development requirements (e.g., for the amount of employment development or number of jobs to be created by developers) and corresponding public actions that would be triggered only when these requirements are met (e.g., construction of roads or

infrastructure). Development agreements have been used extensively in Clark County in order to ensure that new developments deliver the public benefits that are expected by residents.

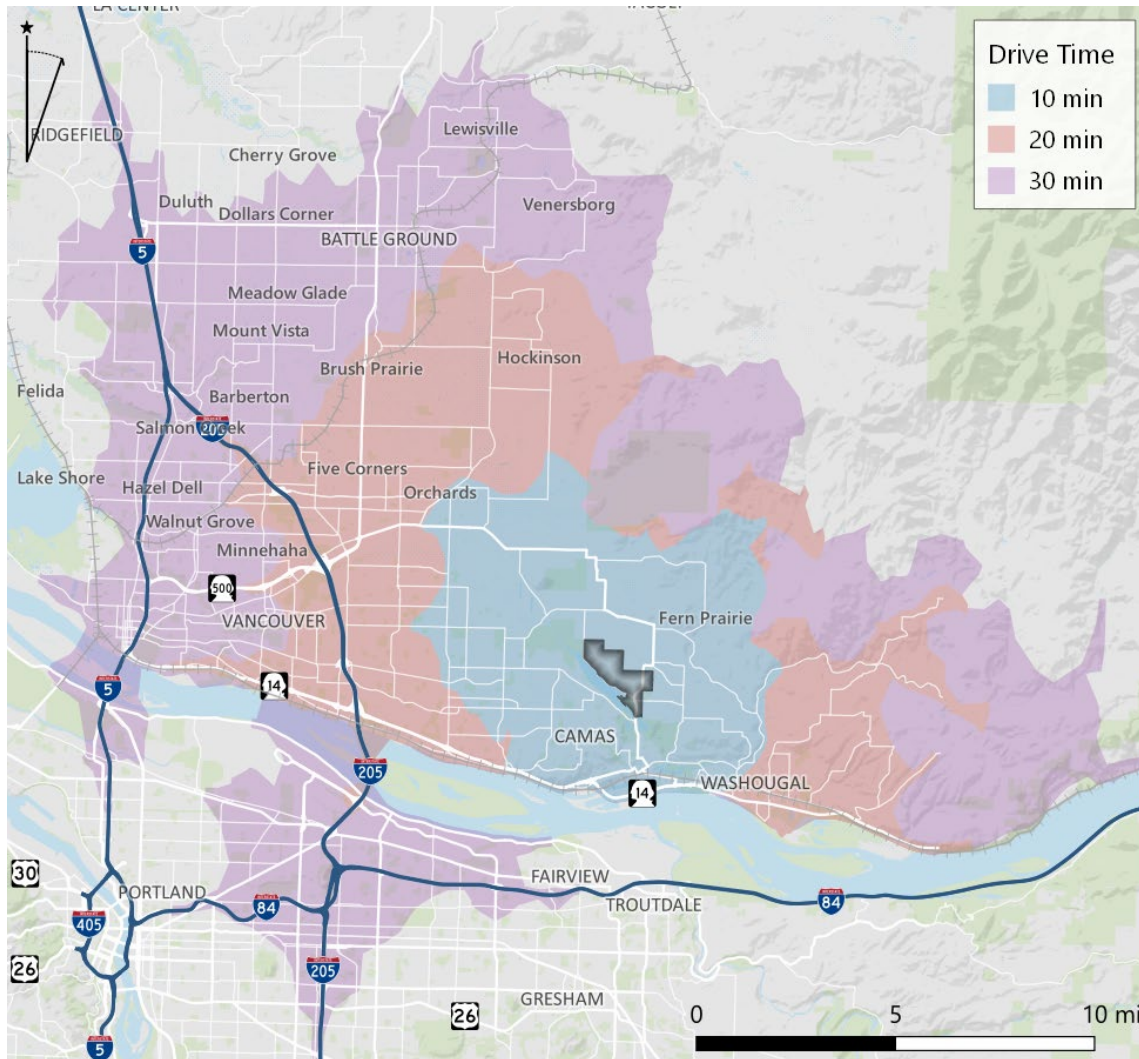
Site Summary

The North Shore Subarea is located in the east of the Portland Metropolitan Region. With Lacamas Lake bordering the entire length of the subarea's western edge, transportation and connectivity are limited to two primary routes to the north and south.

To the south, Highway 14 serves as the primary route to downtown Vancouver and the rest of the metro, primarily via Interstate 205 and Interstate 5. To the north, SR 500 provides access to Interstate 205 and other northern neighborhoods.

The following map shows travel times by car from the Camas North Shore Subarea by 10-minute increments. The average U.S. commute, as of 2018, is 26 minutes one-way, according to the U.S. Census Bureau. For future employees and residents of Camas North Shore, few significant destinations in the Portland Metro Region are within a 30-minute drive.

Figure 4. Drive Time Analysis



Source: Open Street Map (OSM), Google, TIGER, MetroRLIS, Leland Consulting Group

With its location on the edge of the metro region, access to and from Camas North Shore is limited to two primary arterials. However, downtown Camas and the Columbia Tech Center—two prominent activity centers that offer both commercial amenities and significant employment opportunities—are within a 10-minute drive from the subarea. The Columbia Tech Center, on Mill Plain Boulevard, is one of the few major employment clusters in Clark County outside of downtown Vancouver.

REGULATORY CONDITIONS

The City of Camas anticipates substantial growth in the Camas North Shore area over the next 20-years. Planned transportation infrastructure will improve transportation connectivity throughout the City and support the employment and retail uses desired in the North Shore area. A large portion of the land in this area is zoned Business Park and Multi-Family, with some Commercial and lower density residential zoning. The Port of Camas-

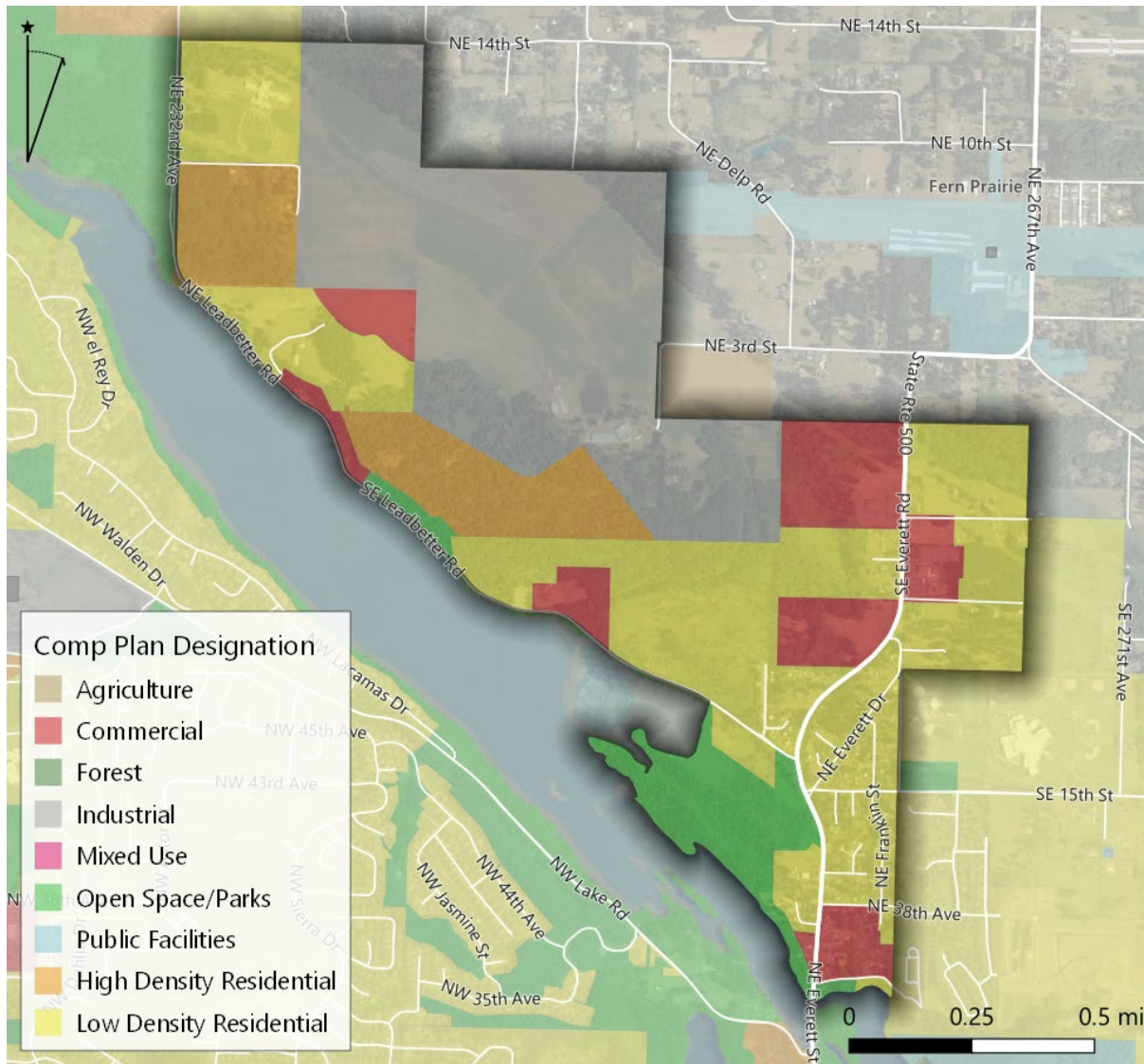
Camas North Shore Subarea Plan | Market Analysis

Washougal manages an airport that is outside City limits, but most of the developable land in the North Shore area is within the airport influence area.

Most of the North Shore's contiguous developable land is designated industrial in the City's Comprehensive Plan and zoned Business Park, providing for employment uses (e.g., office, retail, service industries, high tech, and light manufacturing). While there are several large tracts of multifamily zoned land, these zones also allow for single-family residential. Planned developments (PRDs) can accommodate other conditional uses, regardless of residential density.

- The design of business park facilities in this district is expected to be campus-style, with landscaped buffers, and architectural features compatible with surrounding areas.
- Community Commercial (CC) provides for the goods and services of longer-term consumption. Typical goods include clothing, hardware, and appliance sales. Some professional services are offered, e.g., real estate office or bank. Eating and drinking establishments may also be provided. Lot sizes within this zone tend to vary in size as there are no minimum or maximum lot size requirements.
- Single-family residential zones in the area range from three to six units per acre, with average lot sizes ranging from 7,500 to 12,000 square feet.
- Multifamily zones in the area range from 6 to 18 units per acre. A "Cottage Overlay" zone would allow up to 24 units per acre. If detached, single family dwellings are proposed, then the development would need to meet the minimum of six units per acre.
- There are no maximum dwelling unit requirements for Mixed Use zones or in CC zones, where a development agreement would allow for residential mixed use.

Figure 5. Comprehensive Plan Designations in the North Shore Area



Source: Clark County GIS.

Note: There are no Agriculture, Forest, Mixed Use, or Public Facilities designations in the North Shore area or within the City of Camas. These are County designations.

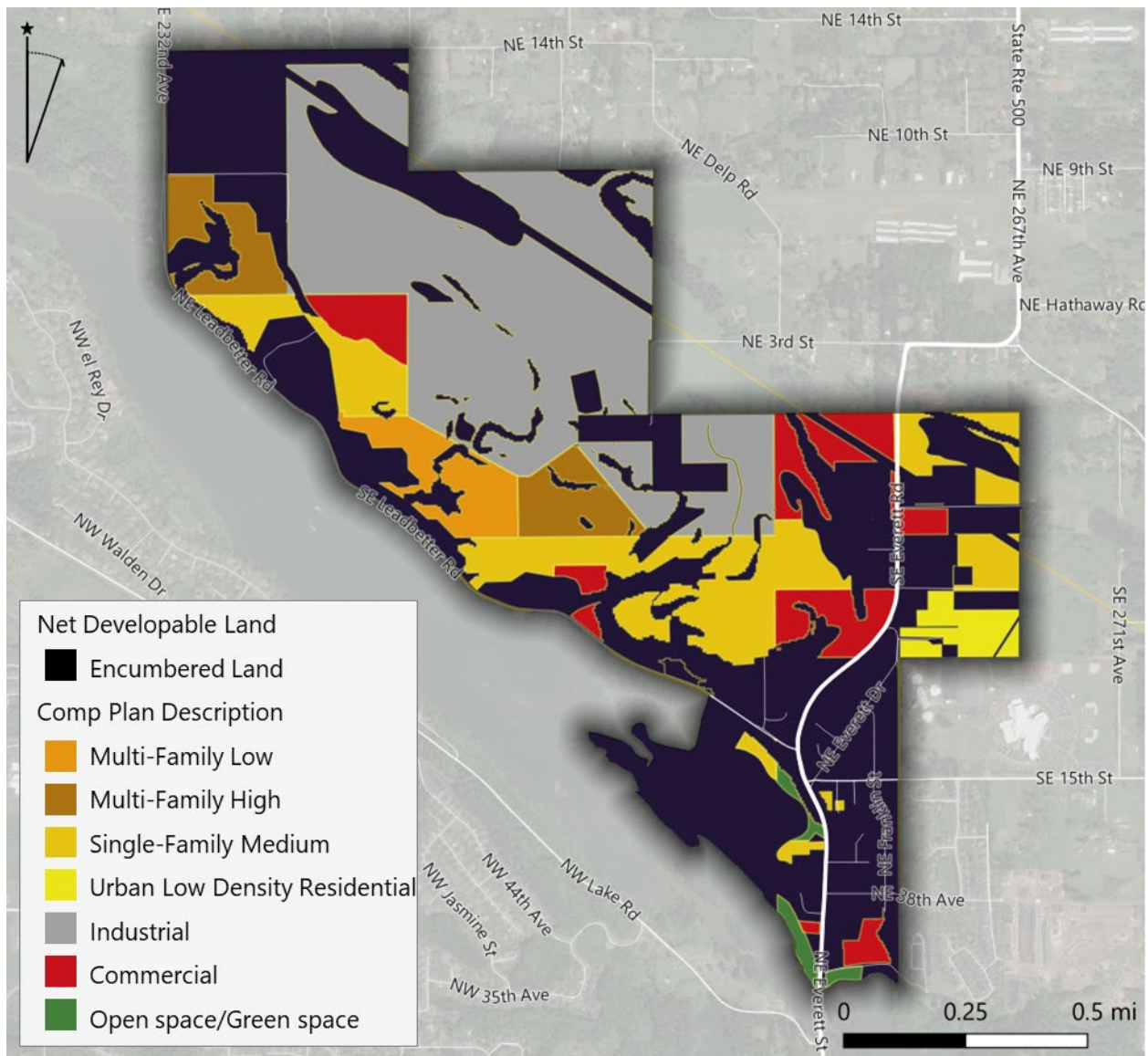
DEVELOPABLE LAND

The “gross area” of the North Shore Subarea is approximately 912 acres. However, this gross area is much larger than the “net developable area” amount of land that is likely to be available for the development of new businesses, homes, and associated roads and utilities. Figure 6 is LCG’s attempt to show land that is undevelopable. What remains is the net developable land, which is color-coded by Comprehensive Plan designation.

Land can be considered undevelopable for a number of reasons. For the purposes of this analysis, LCG has assumed that the following types of land are undevelopable: land that already contains existing residential or

commercial development (specifically, where the assessed value of structures exceeds the assessed value of land, thus indicating a relatively valuable structure); easements (primarily associated with the high-voltage electrical transmission lines and access/road easements); slopes of 15% or more; wetlands; and existing rights-of-way. In addition, LCG assumes that 75 percent of City-owned land will be preserved as parks, recreation, and natural areas, and therefore 25 percent is developable.

Figure 6. Developable Land by Zone



Source: City of Camas, Leland Consulting Group

All of the development limitations summarized above should be seen as reasonable working assumptions that are necessary to inform this market analysis. They do not represent binding policy decisions by the City or other agencies. In addition, some assumptions could prove to be incorrect. For example, developers can build on steeply sloped land, and some existing developed sites could be demolished and then redeveloped.

Nonetheless, our hope is that they inform the subarea planning process and help the community understand what areas are *most likely* to be developable in the future.

Economic Overview

Major industry sectors in Clark County include healthcare and social assistance (24,600 jobs in 2018), professional and business services (20,200), retail trade (19,000 jobs), leisure and hospitality (16,000 jobs) and manufacturing (14,200 jobs). In addition, the government employed 27,100 people, over half of which were in public education.

The primary economic driver for any metropolitan region is job growth. New jobs create more demand for office and industrial space to house employment growth.

- In the last two years, Clark County's rate of job growth (4.6%) has been significantly higher than the three counties in the Portland Region (2.2%).
- Employment, population, and GDP growth will continue to keep the Portland region, including Clark County, among the top five fastest growing metropolitan regions in the nation and the most rapidly growing region on the West Coast over the next year or two.
- High income households are expected to continue to make major gains.
- Growth of the national economy is slowing after decade-high gains in 2018.
- Moderated job growth will continue to tighten the labor market
- Forecasters believe that Washington will continue to outperform the United States
- Employment growth is expected to be moderate to three percent.

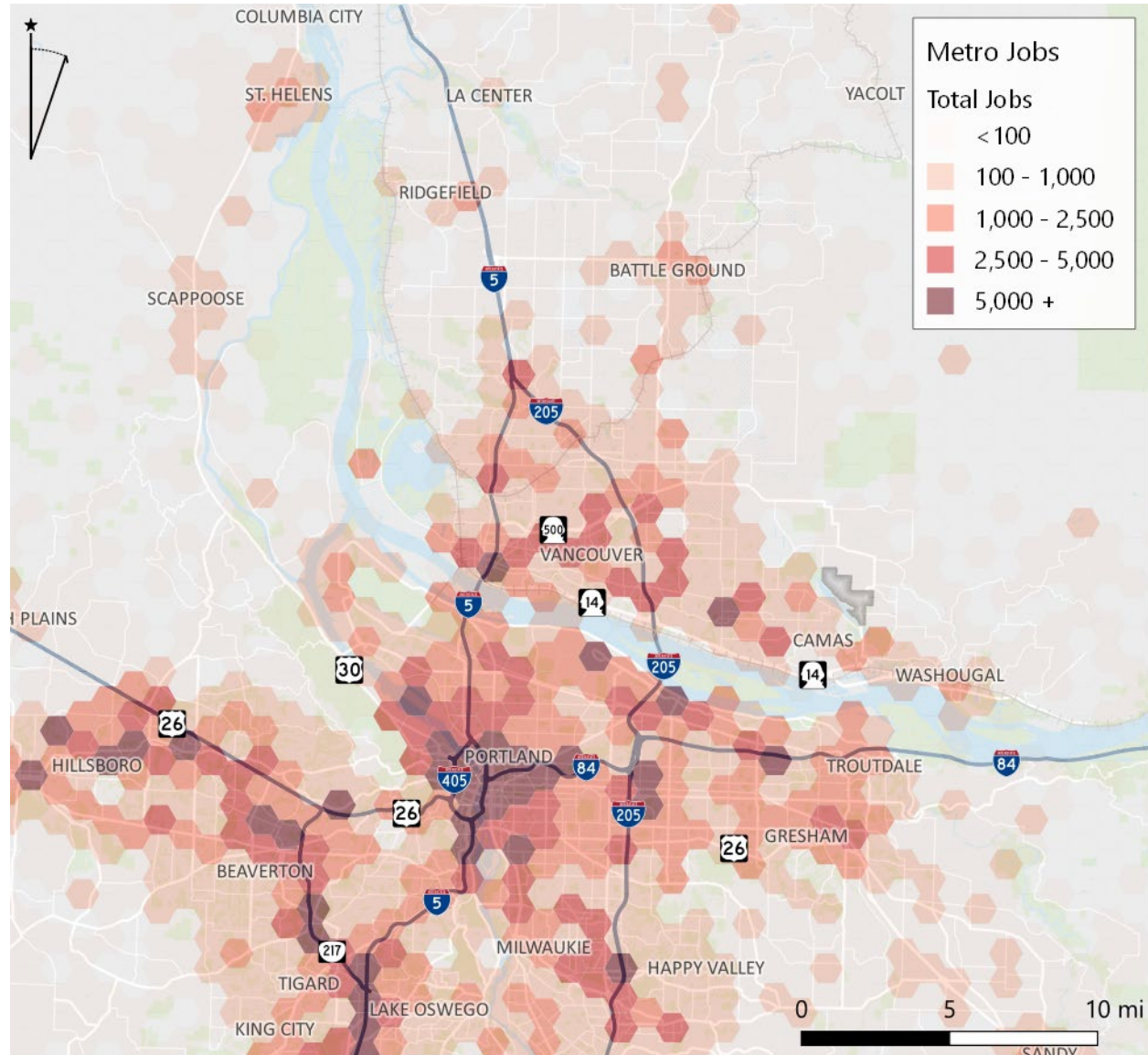
Going forward, the Columbia River Economic Development Council (CREDC) has identified manufacturing, technology, healthcare, and construction as high-growth industries. These industries are likely to be relevant for the Camas North Shore and the surrounding region.

- **Manufacturing** – CREDC recognizes local manufacturing for employment opportunities, technological advancements, and spurring productivity in both innovation and development.
- **Technology** – technology crosses nearly every sector in our economy. From health care and manufacturing to finance and retail, technology is changing the economic landscape of the region. Tech and tech-enabled industries are expected to grow 20 percent with 10,000 new jobs projected by 2026. An influx of young, skilled, creative talent has fueled the development of new startups and innovative solutions across a broad swath of industries. A diverse array of training providers has emerged to increase the supply of skilled workers.
- **Healthcare** – healthcare makes up approximately 12 percent of the region's private sector employment and payroll and is projected to grow by at least 23 percent over the next 10 years. Further, more than half of the jobs in the industry pay \$20 or more an hour. With the aging population projected to substantially increase, the industry is forecast to grow significantly to meet these demands.
- **Construction** – demand for construction jobs remains very high throughout the region as real estate development continues.

The following map shows the location of significant job centers in the Portland metropolitan region relative to major transportation routes. The greatest job densities tend to be located in downtown Portland and along

highways, such as US-26, SR-217, I-5, and I-205. The relative isolation—at least in terms of proximity to these major transportation corridors—of the Camas North Shore area is apparent.

Figure 7. Portland Metro Region Job Density (2017)



Source: LEHD OnTheMap (QCEW), Leland Consulting Group

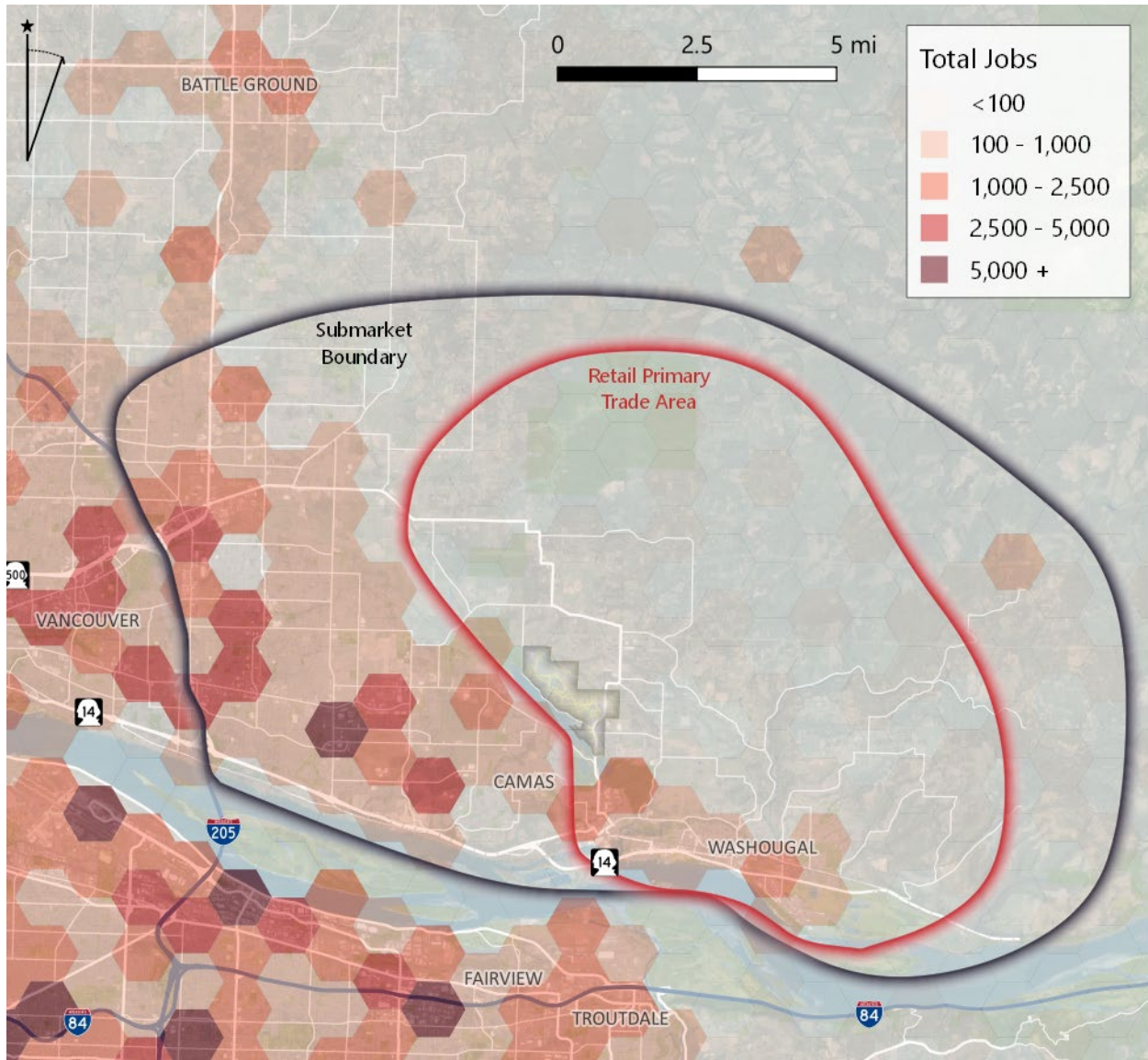
SUBAREA EMPLOYMENT PROFILE

The following map shows job clusters in the region surrounding the Camas North Shore. There are very few jobs to the east of the North Shore area, and the highest concentration of jobs within the submarket is the Columbia Tech Center along Mill Plain Boulevard in Vancouver. The I-205 corridor is also home to many jobs, as is the industrial area that lines the south side of the Columbia River.

The map also shows the retail primary trade area and submarket boundary.

- **Retail primary trade area:** The primary trade area represents the area from which most retail spending will be derived. This area is used for the retail demand model presented later in this document, which provides estimated demand by square feet per retail category.
- **Submarket:** The submarket denoted in black represents the residential and employment market areas, reflecting the area from which most competitive development will originate.

Figure 8. Activity Centers & North Shore Submarket (2017)



Source: LEHD OnTheMap (QCEW), Leland Consulting Group

The following table shows wage information for Clark County versus the USA, and employment information for the North Shore Submarket (as identified in the map above).

- Retail is the dominant industry in terms of total jobs in the submarket jobs shown in the above map but has one of the lowest average wages.

Camas North Shore Subarea Plan | Market Analysis

- Office demand-generating jobs in industries such as finance and insurance, management of companies and enterprises, and information all show significantly higher concentrations of jobs in the submarket than on average in the rest of the Portland metro region.
- Industrial demand-generating jobs in industries like manufacturing are about as concentrated in the submarket as the rest of the metro but have a very high number of jobs.

Table 1. Employment and Wage Profile

NAICS	Industry Sector	Clark Co Avg. Wage 2018	USA Avg. Wage 2018	Submarket Jobs 2017	Location Quotient MSA 2017
52	Finance and Insurance	\$88,688	\$109,231	3,075	1.59
61	Educational Services	\$31,462	\$51,250	5,987	1.30
51	Information	\$65,846	\$113,781	1,682	1.30
44-45	Retail Trade	\$33,105	\$32,362	6,712	1.23
55	Mgmt. of Companies & Enterprises	\$106,513	\$122,843	2,203	1.19
72	Accommodation & Food Services	\$20,541	\$21,559	5,086	1.09
42	Wholesale Trade	\$74,919	\$77,870	2,919	1.07
31-33	Manufacturing	\$59,836	\$68,525	5,739	1.05
54	Professional, Scientific & Tech Svcs.	\$78,920	\$97,113	3,592	1.02
53	Real Estate and Rental and Leasing	\$49,556	\$59,129	883	0.96
81	Other Services	\$40,716	\$38,464	1,934	0.91
23	Construction	\$58,867	\$62,727	2,667	0.86
71	Arts, Entertainment, Recreation	\$22,919	\$38,887	5,660	0.81
62	Health Care & Social Assistance	\$53,028	\$50,326	746	0.80
56	Administrative & Support Svcs.	\$39,014	\$40,985	2,529	0.80
48-49	Transportation, Warehousing	\$NA	\$53,197	507	0.28
11	Ag, Forest, Fishing & Hunting	\$NA	\$35,841	149	0.26
21	Mining, Oil & Gas Extraction	\$NA	\$35,841	8	0.24
22	Utilities	\$NA	\$109,957	41	0.24

Source: Bureau of Labor Statistics, QCEW data (note: Some data not available for Clark County for confidentiality reasons)

Tax Structure

Clark County's economy is based around the major industry of healthcare and social assistance, professional and business services, retail trade, leisure and hospitality, and manufacturing.

Employment grew rapidly in all sectors during the 1990s but slowed after the 2001 recession. Construction and homebuilding remained strong until the housing bubble burst in 2006-2007. The county lost a substantial proportion of its employment base in the downturn, about the same as the state and nation, but has since seen significantly better job growth than both the state and nation. The economic forecast for Clark County remains positive.

As part of the Portland-Vancouver market, which spans two states (OR and WA), Clark County is in a unique position tax-wise (profiled in the following table). About one-third of the county's labor force commutes to Portland on a daily basis, while only about 11,000 people commute in the opposite direction. Washington levies

Camas North Shore Subarea Plan | Market Analysis

a sales tax on retail purchases, and a business receipt tax but no income tax, while Oregon levies individual and business income tax but no sales tax. There are no local business taxes in Clark County outside standard business licensing fees.

Table 2. Tax Comparison

Tax Type	WA (Clark County)	OR (Mult. County)	OR (Wash. County)
Corporate Excise Tax	None	6.6% of net Oregon income.	6.6% of net Oregon income.
Personal Income Tax	None	Up to 9% of taxable income.	Up to 9% of taxable income.
Personal Income Tax (Co)	None	1.45% of net Oregon income	None
State Business Tax	Manufacturing/Wholesaling 0.484%; Retailing 0.471%; Service and other activity 1.50%. Based on gross sales.	None	None
Business License Fee (City)	\$10 annual fee (City of Camas) \$100 per employee surcharge (City of Vancouver)	2.2% of net business income \$100 minimum (City of Portland)	0-4 Employees: \$50 per year; each additional employee \$8.50 per year. (City of Beaverton)
Sales Tax	State 6.5%, Clark County 1.7%	None	None
Transit District Tax	None	0.6718% flat rate payroll tax	0.6718% flat rate payroll tax
Real & Personal Property Tax	Average rate \$10.48 per \$1,000 of assessed value.	Average Rate. \$18.6 per \$1,000 of assessed value.	Average Rate. \$16.40 per \$1,000 of assessed value.
Unemployment Insurance Tax	Average 1.7% on the first \$34,000 in wages	0.9%-5.4% of the first \$30,200 of an employee's salary.	0.9%-5.4% of the first \$30,200 of an employee's salary.
Industrial Insurance (WA), Workers Compensation (OR) <i>*See Note</i>	Industrial Insurance sample rates: Misc. Manufacturing: \$0.6639; Transportation & Warehousing: \$1.608; Misc. Professional Services: \$0.1748 (per hour worked)	Workers' Compensation is broken down into 3 separate taxes. 1) Premiums paid to private insurance companies that range from \$1.8-\$7.2 per \$100 of wages paid. 2) 4.6% Premium Assessment fee of the annual total premium. 3) Workers Benefit Fund, paid to the state, 1.4 cents per worker hour worked paid by employees, and 1.4 cents per hour worked paid by employer.	Workers' Compensation is broken down into 3 separate taxes. 1) Premiums paid to private insurance companies that range from \$1.8-\$7.2 per \$100 of wages paid. 2) 4.6% Premium Assessment fee of the annual total premium. 3) Workers Benefit Fund, paid to the state, 1.4 cents per worker hour worked paid by employees, and 1.4 cents per hour worked paid by employer.

Source: Columbia River Economic Development Council, February 2009

ECONOMIC FORECASTS

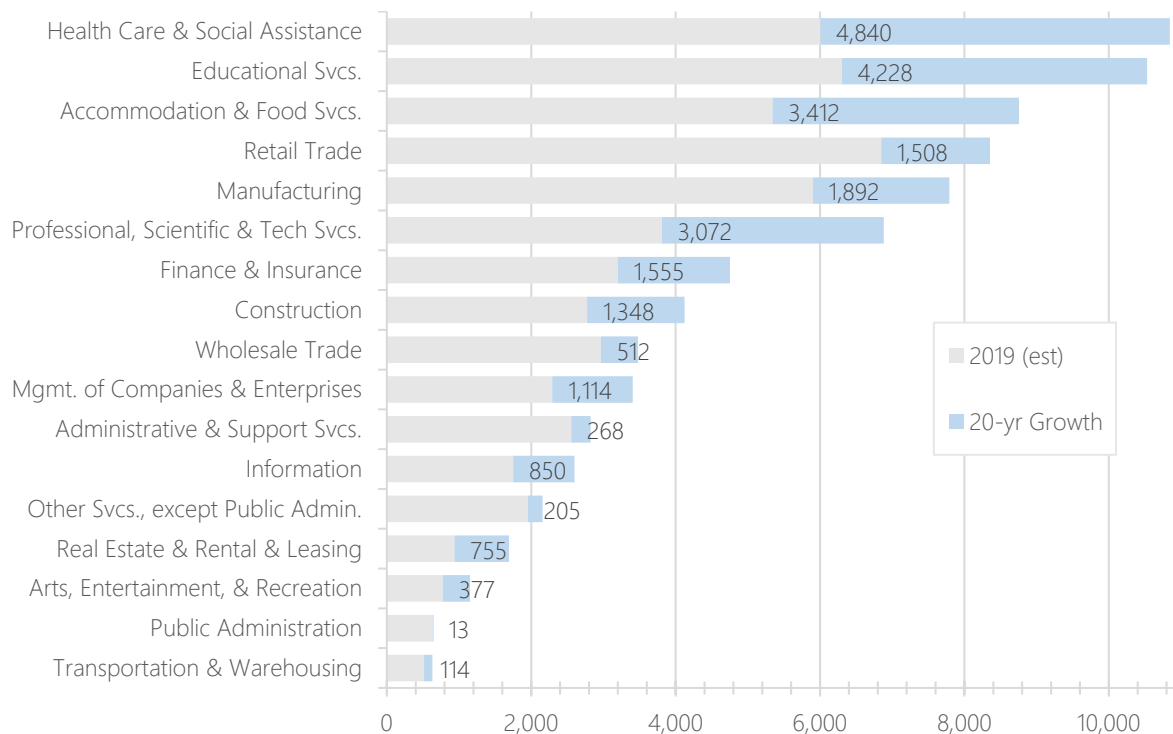
The Washington Employment Security Department (WAESD) provides 10-year employment projections (2017 to 2027) for Clark County. These projections demonstrate the regional economic trends that could be applied to the types of development targeted in the [east of I-205] submarket and the Camas North Shore area.

Among the fastest-growing industries for the next decade, according to WAESD, are:

- Education Services (2.8 percent)
- Health Services and Social Assistance (2.2 percent)
- Professional, Scientific, and Technical Services (2.2 percent)
- Accommodation and Food Services (1.8 percent)
- Construction (1.8 percent)

Realistically, however, employment growth in east Clark County is likely to fluctuate based on a number of differentiating factors, such as location, market dynamics, and politics. Employment trends over the past five to 10 years for the submarket give an indication of how these projections might change for this area. The following chart shows 20-year employment projections based on WAESD’s 10-year forecasts for Clark County and historical employment trends for the submarket.

Figure 9. Projected 20-year Job Growth, East of I-205 Submarket



Source: WAESD, LEHD, Leland Consulting Group

KEY TAKEAWAYS

- The prominence of healthcare, educational, retail, and accommodation and food service jobs is typical of suburban locations situated on the periphery of more significant employment clusters.
- With almost 4,000 jobs in the Professional, Scientific, and Technical Services industry, the area demonstrates its attraction for suburban office development. Significant growth is expected over the next 20 years, driving demand for additional office space.
- Employment forecasts for the industries of Manufacturing, Technology, Healthcare, and Construction look positive for east Clark County—trends on which future development in the North Shore area can leverage.
- Clark County’s tax structure is attractive to prospective large businesses.

Demographic Profile

EXISTING DEMOGRAPHIC CONDITIONS

While the North Shore area is largely undeveloped, it is expected to continue to experience substantial growth over the next two decades. In recent years, many new residents have been attracted to Camas for many different reasons, including its tax structure, housing availability, small-town feel, access to both the Portland metro and Cascade Range, schools, and high quality of life.

These attractive qualities are reflected in the high growth of Camas and Washougal—which shares similar characteristics—over the past two decades. In fact, per the following table, Camas experienced one of the highest rates of population growth (2.53 percent) among cities in the Portland Metropolitan Area (MSA), and the highest rate in Clark County among cities with a population of 10,000 or more.

Camas remains largely residential as opposed to a significant employment destination, reflected in the city’s greater proportion of daytime residential population versus worker population.

Table 3. Population Characteristics

Population	North Shore Subarea	Camas	Washougal	Vancouver	Clark County	MSA	United States
2000 Total	187	12,640	9,686	148,886	345,238	1.9m	281.5m
2010 Total	377	19,848	14,102	167,554	425,363	2.2m	308.5m
2019 Total	462	24,845	17,089	188,923	496,461	2.5m	332.5m
00-19 CAGR	4.88%	3.62%	3.03%	1.26%	1.93%	1.42%	0.88%
10-19 CAGR	2.28%	2.53%	2.16%	1.34%	1.73%	1.38%	0.82%
2019 Daytime Pop	335	24,512	13,299	206,568	441,355	2.5m	330.5m
Workers	87	11,424	3,998	106,958	177,348	1.3m	158.5m
Residents	248	13,088	9,301	99,610	264,007	1.2m	172.0m

Source: ESRI. CAGR: Compound Annual Growth Rate.

The following table demonstrates some of the key household characteristics across all comparison areas.

Camas North Shore Subarea Plan | Market Analysis

- Camas has some of the highest earning households across the region, with a median income of \$110,637 in 2019.
- Households in Clark County are generally cheaper than the regional average, yet Camas households are by far the highest value homes among comparison areas.
- These home values are perhaps reflective of owner-occupied single-family homes that are accommodating significantly larger households. Indeed, recent growth trends—which are summarized in the next section—indicate that single-family residential has been by far the predominant land use type, with multifamily and non-residential uses (including recent development) more prominent in eastern Vancouver within the submarket.

Table 4. Household Characteristics

	North Shore Subarea	Camas	Washougal	Vancouver	Clark County	MSA	United States
Avg. HH Size	3.05	2.99	2.72	2.45	2.71	2.55	2.60
1- & 2-person HHs	55.9%	48.0%	55.9%	63.4%	57.1%	61.1%	59.5%
Med. HH Income	\$101,496	\$110,637	\$81,721	\$62,590	\$77,499	\$75,170	\$60,548
Med. Home Val.	\$482,143	\$476,770	\$350,482	\$287,516	\$343,496	\$394,258	\$234,154
% Rented HHs	24%	21%	25%	47%	32%	38%	36%

Source: ESRI

Camas appears an attractive city for families with children, per the following table which shows 43 percent of the population aged 35 to 64 and 27 percent aged under 18. These trends are more pronounced than the surrounding cities, Clark County, and the region.

Educational attainment levels are also uncharacteristically high, with more than half of the population (aged 25 and over) with at least a bachelor's degree.

Table 5. Age & Education Characteristics

	North Shore Subarea	Camas	Washougal	Vancouver	Clark County	MSA	United States
Median Age	39.9	38.2	39.1	38.0	38.3	38.3	38.5
% Under 18	22.0%	26.8%	23.6%	22.0%	23.5%	21.2%	21.8%
% 18-34	21.1%	17.7%	20.7%	23.3%	21.6%	23.5%	23.4%
% 35-64	41.1%	43.0%	40.4%	38.2%	39.3%	40.1%	38.4%
% 65+	15.8%	12.5%	15.3%	16.5%	15.6%	15.2%	16.4%
% with bachelor's	41.0%	51.6%	30.2%	28.6%	30.6%	40.2%	32.5%

Source: ESRI

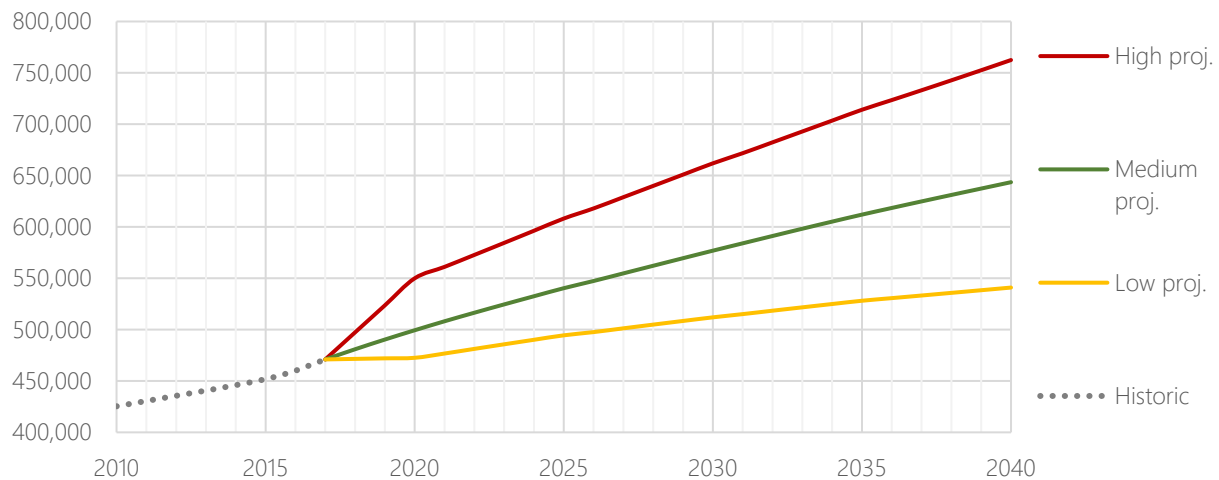
DEMOGRAPHIC FORECASTS

- Today, Camas is home to almost 25,000 people, but this is expected to increase to 34,000 in the next 20 years, an increase of 36 percent. Growth projections (shown in red in the following chart) for Clark

County indicate population increasing by about 179,000 people in the next 20 years, a slightly lesser increase of 34 percent.

- Clark County has been the beneficiary of retired households moving to Clark County from Portland, to escape Oregon income taxes.
- The Portland Region has added an average of approximately 30,000 jobs per year in the last five years. This trend has kept the Portland housing market among the strongest in the nation.

Figure 10. Population Growth Projections, Clark County



Source: Projections of the Total Resident Population for Growth Management, 2017 GMA Projections, WAOFM - Forecasting & Research

Housing Impacts of Shifting Age Demographics

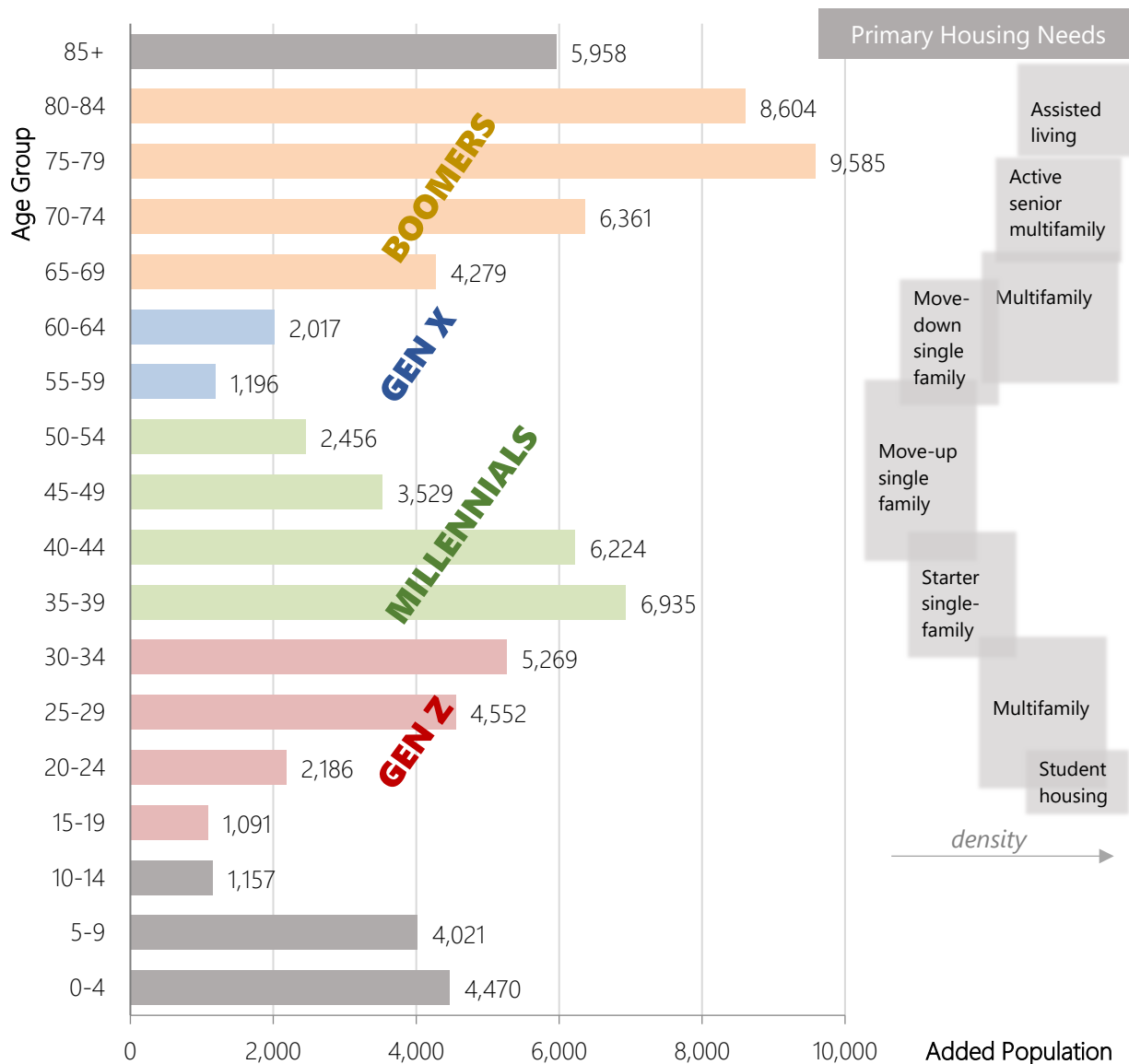
Housing needs change significantly depending on life stage. Given the projected growth in those aged 30 to 44 and 70 and over, the housing “needs” of those age groups are mainly multifamily, starter single-family (typically attached, such as townhomes, stacked flats, or duplexes), and senior housing. It is worth noting that these needs are associated with *current* trends and may shift significantly in the coming years. Indeed, in the past 20-somethings have generally moved away from multifamily and sought single-family homes instead.

These trends are presented in the following figure, which shows projected population growth by 2029 for Clark County. The age structure of Camas’ population is currently very similar to that of Clark County, so the housing impacts of shifting age demographics are likely to be similar for Camas.

- Much is made of the housing needs and desires for current generations, with the most common argument surrounding the Millennial propensity for inner-city apartment living. While recent trends indicate that many Millennials are moving in a more traditional direction to single-family owner-occupied housing as they marry and/or settle down, these trends are not as pronounced as in the past.
- Baby Boomer growth is likely to present unique opportunities and challenges to those of the Millennials. It appears to be an open question whether aging Baby Boomers—who are typically less encumbered by financial constraints than their younger counterparts—will be attracted to apartment rental living by choice.

- Research such as the “America in 2015” survey done by the Urban Land Institute (ULI) indicates that as nests begin to empty, Boomers will turn to smaller, lower-maintenance housing choices, albeit still in the suburbs.
- Other recent opinion research, such as a 2013 survey done by The Demand Institute, however, seems to suggest that most Boomers may still be drawn to the idea of homeownership and yards in the suburbs.

Figure 11. Projected New Clark County Growth by Age (2029)



Source: Office of Financial Management 2017 Population Projections for Clark County

KEY TAKEAWAYS

- Camas experienced one of the highest rates of population growth (2.53 percent) among cities in the Portland Metro Region (MSA), and the highest rate in Clark County among cities with a population of 10,000 or more. Growth is expected to continue at a faster rate than Clark County.
- Camas is home to some of the most educated, highest income residents in the region. On a related note, home values are among the highest in the region. This is potentially because of the growth of larger houses leveraging the family-friendly attraction of the city (demonstrated by the high proportion of children and those aged 35 to 64).
- Projected population growth for the next decades indicates significant growth in those aged 30 to 44 and 70 and over, the housing “needs” of those age groups are mainly multifamily, starter single-family (typically attached, such as townhomes, stacked flats, or duplexes), and senior housing.
- The Portland Region has added an average of approximately 30,000 jobs per year in the last five years. This trend has kept the Portland housing market among the strongest in the nation.

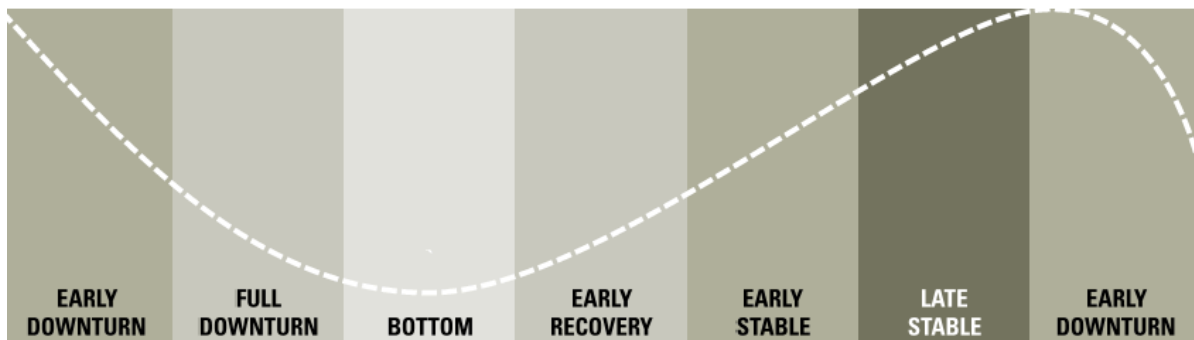
Real Estate Market

NATIONAL CONTEXT

National Market Trends

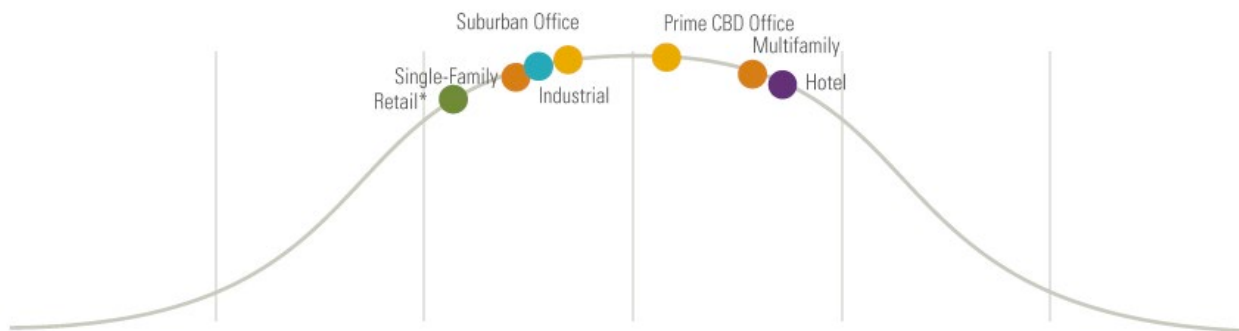
All real estate land uses are governed by the real estate cycle. These land uses move upwards from the bottom of a cycle after a recession, like in 2009/2010, to the top of the cycle and then transition into a downward trend.

Figure 12. The Real Estate Cycle



Different land uses are usually at different stages in the real estate cycle with leaders and followers. The graph below shows where selected land uses are currently at a national level in the major metropolitan markets across the country. Leland Consulting Group believes this graph is relatively applicable to the Portland Regional market.

Figure 13. Position of Selected Land Uses in the Real Estate Cycle



- Nationally, hotels and multifamily residential are leading other land uses into a downturn. Due to the significant amount of new multifamily housing construction in Clark County since 2012, we believe multifamily housing is also ahead of other land uses in the real estate cycle.
- The national, regional, and local real estate markets are, for the most part, in the mature phase of the real estate cycle. Demand has leveled off, but construction still continues, particularly in multifamily apartments, at a tepid pace. Overbuilding is a strong possibility.
- Markets are likely to begin trending downward starting in 2020. Many economists are predicting a national economic recession, albeit a mild one compared to 2009, in 2020 or 2021.

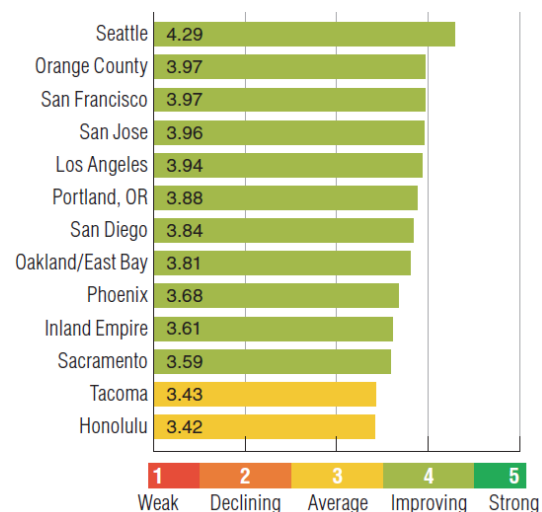
Development and Land Use Types

This section includes excerpts from the Urban Land Institute’s (ULI) Emerging Trends in Real Estate report for 2019, an annual publication that assesses the state of real estate markets both nationally and locally based on interviews and surveys with experts in development and finance. Both national and regional trends have an impact on future land uses in the study area: they set the stage for the types of investments that are desirable for real estate developers and investors.

*Emerging Trends*¹ suggests that access to talent (i.e., well-educated workers) is what drives the economies of many of the Pacific Northwest markets.

The Portland metropolitan region² is described by ULI as a "solid 18-hour city" whose strengths include strong economic growth due to increased wealth in the market, high quality of life and attractive outdoor activities, and a diverse workforce that helps to supply trained labor to industries.

Figure 14. Local Outlook: Pacific Northwest



Source: ULI

¹ URL

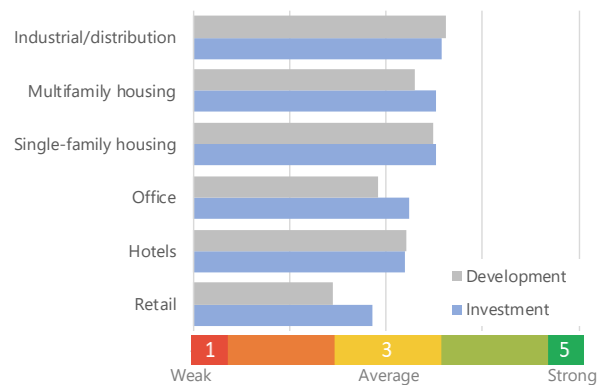
² Since McMinnville is on the periphery of the Portland metropolitan area, Portland directly impacts McMinnville’s economy.

While the regional economy is not considered as strong as other Pacific Coast major metropolitan regions, it has experienced the benefit of being able to offer a more competitive cost structure to its more expensive neighbors along with a high quality of life for residents. This is a prime example of how quality of life can drive an economy and one that Camas can continue to leverage, especially given the affordability challenges facing the Portland metro.

Development Prospects

National development prospects indicate investor behavior. These prospects are summarized in the Urban Land Institute’s (ULI) annual report, Emerging Trends, which provides guidance about the types of development that are likely to be most desirable in the coming years from a developer and investor perspective. While this is a national outlook, the guidance is relevant for most local markets, including Camas’.

ULI’s development prospects for 2019 are shown at right. These align somewhat with recent development trends in Camas, which are mostly residential.

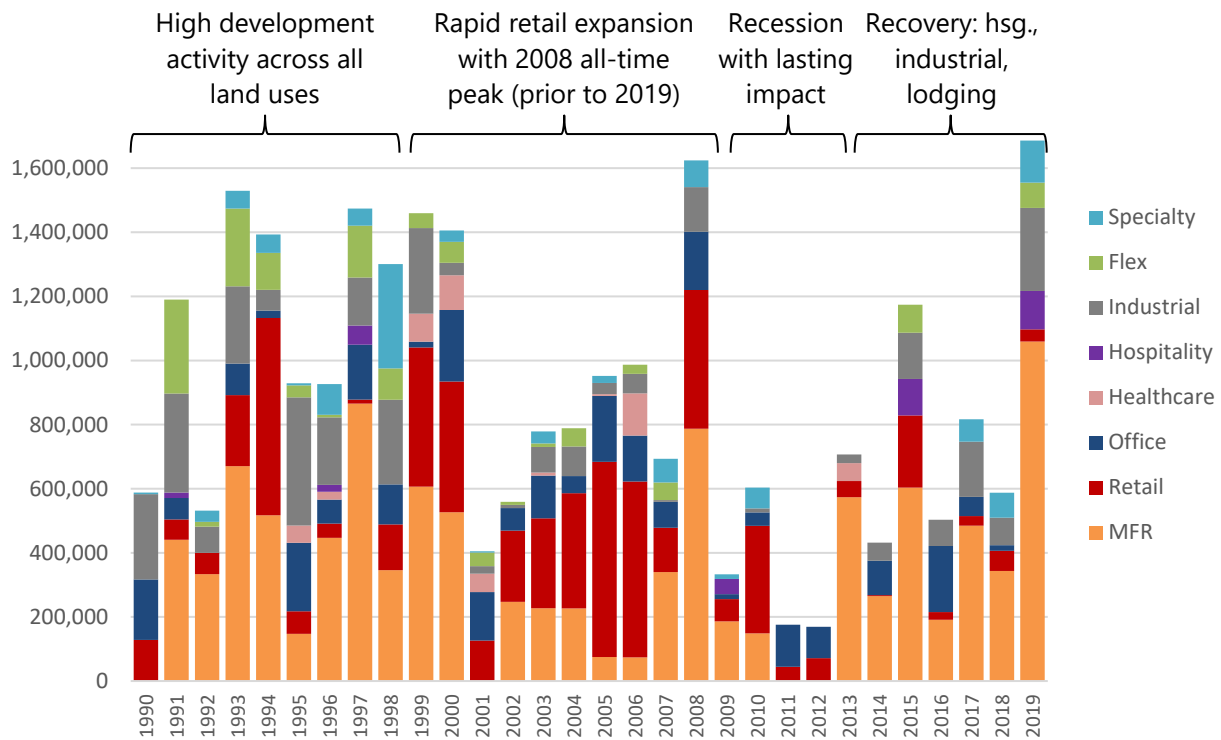


- Industrial development prospects have recently surged, largely due to e-commerce and the heightened need for facilities linked with logistics and distribution.
- Residential prospects remain strong, both nationally and regionally. The two largest generational cohorts—Baby Boomers and Millennials—are driving the bulk of residential demand. As Boomers get close to retirement age, demand for move-down single-family and multifamily housing has surged. For Millennials, the focus on multifamily appears to have slowed somewhat and are at a historical low of 62% homeownership, with more now looking to get on the property ladder as the economy improves, they start families and/or move up the career ladder.
- The “retail apocalypse” has been well-documented in recent years, with traditional brick-and-mortar retailers struggling to compete with the rapid growth of ecommerce and shifting consumer habits. However, this is not to say that retail is a failing development type in general. In fact, total retail spending has continued to climb, and recent spending on experiential and food-based retail, in particular, has seen significant growth. Under the right conditions—where demand exists and development is feasible—certain retailers can thrive, helping foster a live-work-play mixed-use environment and building a sense of place.
- Office prospects are mixed, with trends showing a continued decline in office space use per employee, more mobility in the employment market as remote work becomes increasingly feasible and employment growth slows. Mixed-employment campuses including flex, office, light industrial, and other compatible retail and even residential uses are increasingly popular in locations boasting access to natural and physical amenities, high capacity transportation, and skilled workforces. The North Shore could be poised to capitalize on this trend, but will require some investments, particularly in transportation and infrastructure.
- Hotel prospects are positive in certain markets/specialized locations.

SUBMARKET DEVELOPMENT TRENDS

Historically, currently, and in the foreseeable future, the Cascade Park submarket between I-205 and SE 192nd has been and will remain the primary competitor for the Camas/Washougal subarea for all land uses except single-family housing. Further, as discussed earlier in this report, there is still a large supply of vacant developable commercial and industrial land west of 192nd. Multi-family apartment land is more constrained due to the rapid pace of construction that has taken place throughout Vancouver over the last 10 years.

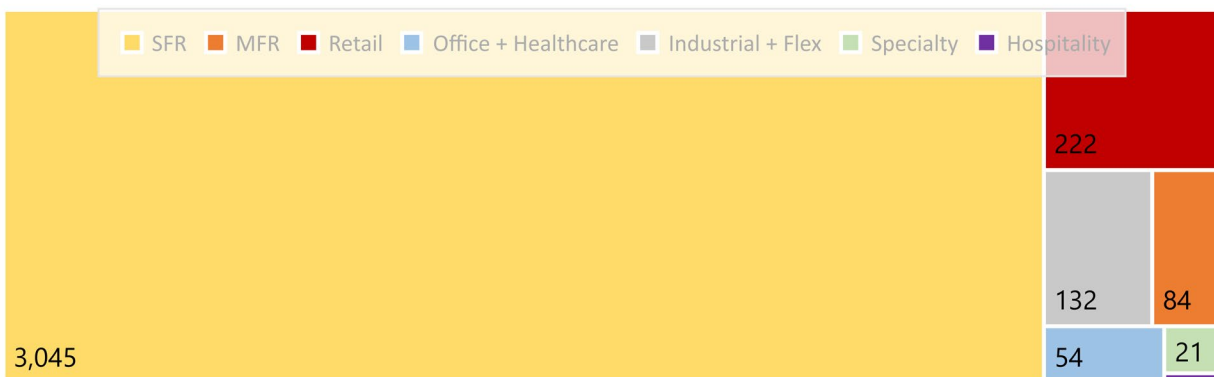
Figure 15. Development Trends Analysis, 1990-2019, Camas North Shore Submarket



Source: Costar, Leland Consulting Group

While the above chart excludes single-family residential, the following chart shows all land uses in terms of acres developed over the past decade. Single-family residential is responsible for about 86 percent of development between 2008 and 2018.

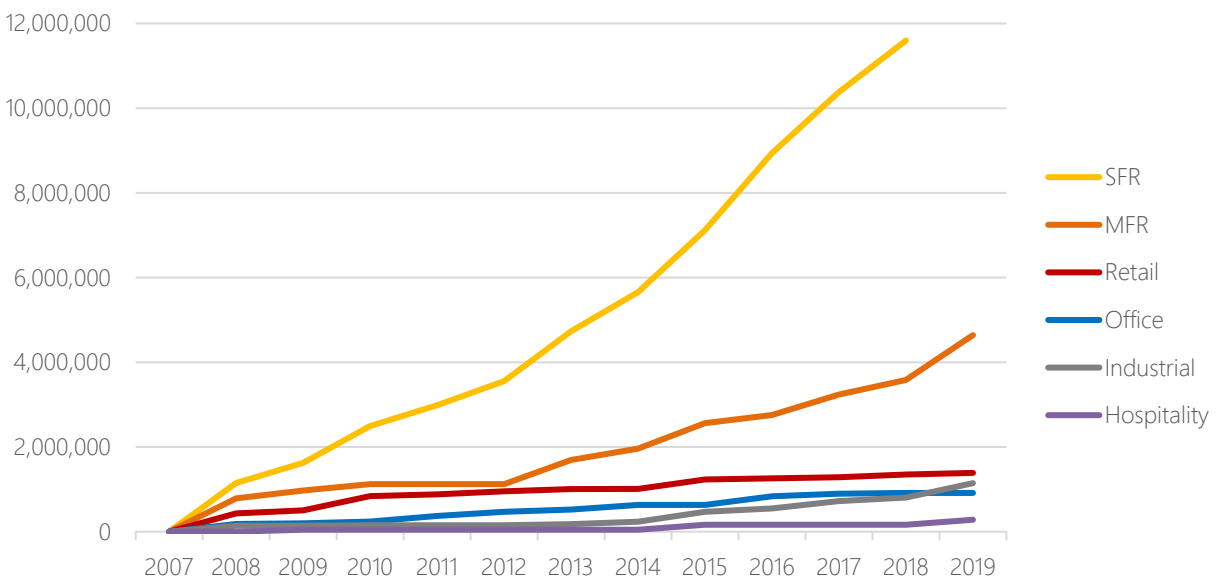
Figure 16. Acres Developed by Land Use, East of I-205, 2008-2018



Source: CoStar, Clark County Assessor

Single-family residential accounts for a lesser proportion of net new building area as about 62 percent of the total. Due to the higher density of multifamily residential, apartments are responsible for 19 percent of net new development despite having only two percent of total acres developed during this same period. Office portrays a similar picture, with five percent of total building area and just two percent of land acres developed.

Figure 17. Gross Building Area (Square Feet) of Development by Land Use, East of I-205, 2008-2019



Source: CoStar, Clark County Assessor

Note: 2019 SFR Data Unavailable

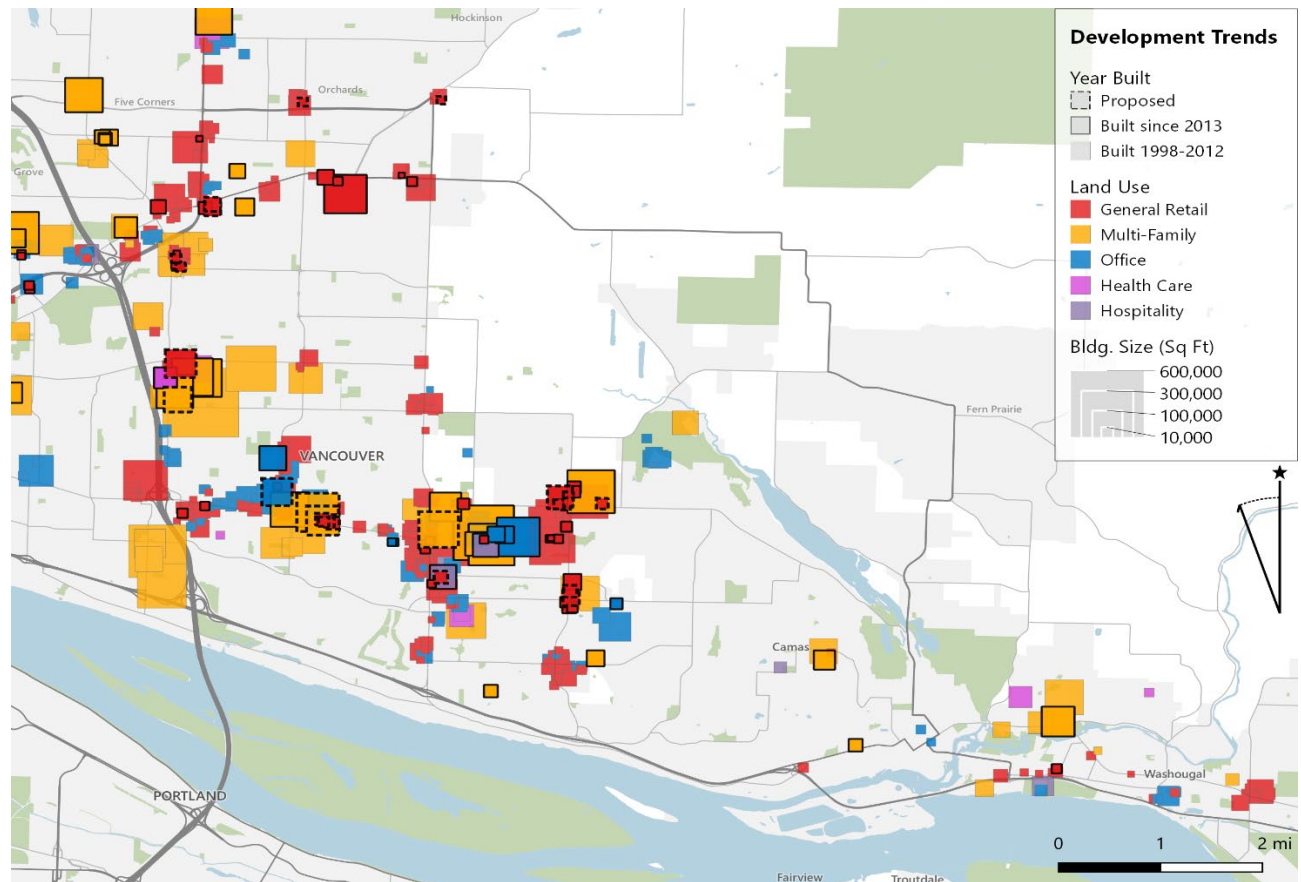
The development trends shown above are depicted spatially on the following map, which shows historical, current, and proposed commercial and multifamily real estate developments east of I-205 since 1998.

- These projects are color-coded by land use.
- The size of the square is representative of the size of the project.
- Squares/projects with no line around them were constructed from 1998 to 2012.
- Squares/projects with a solid line have been built since 2013 or are under construction.

- Squares/projects with dotted lines are proposed.

As the map shows, the newest development has been built along Mill Plain Boulevard near 136th Ave and 164th Ave (Columbia Tech Center). In fact, the vast majority of past and pipeline market supply is located west of SE 192nd.

Figure 18. Historical and Future Projects East of I-205



Source: CoStar

EMPLOYMENT MARKET

Employment in this section refers to office and industrial uses. Trends are presented for the east of I-205 submarket. This submarket is dominated by the Columbia Tech Corridor rather than the Camas/Washougal area, which has seen only a few new additions to the inventory.

Office Market

The East of I-205 submarket has experienced significant office growth in the past decade. Absorption is expected to increase over the next few years and remain higher than planned and proposed office building deliveries, indicating demand for more construction in the near-term.

Camas North Shore Subarea Plan | Market Analysis

- The vacancy rate is currently around 6.4 percent, which is reflective of a somewhat undersupplied market. A 10 percent vacancy rate is generally viewed as an office market that is in balance between supply and demand.
- Rent growth has been moderate in recent years but the market has been tightening, which is expected to push rents up. Average annual rent growth is forecasted to decline over the next five years and overall vacancy is expected to increase slightly.
- The primary competitor for office space in the North Shore area is going to be the Cascade Park subarea to the west, which includes the Columbia Tech Corridor.

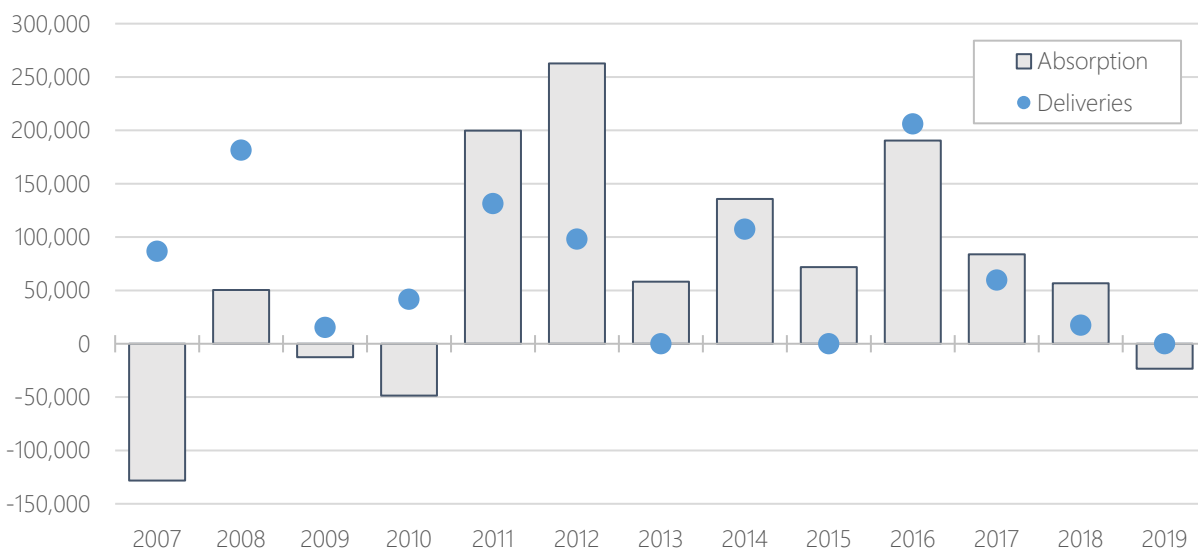
Table 6. Office Submarket Trends

	Historical (2015-2019)		Projected (2020-2022)	
	Total Sq. Ft.	Annual Avg.	Total Sq. Ft.	Annual Avg.
Current Inventory (2019)	4,124,901			
Projected Inventory (2022)			4,338,101	
New Supply	283,132	56,626	213,200	71,067
Absorption	379,264	75,853	330,876	110,292
Over/Under Supply	96,132	19,226	117,676	39,225
Rent Growth		1.7%		
Vacancy (2019)	6.4%			

Source: Costar, Leland Consulting Group

Absorption and construction trends are shown in the following figure. While absorption and deliveries have been in decline in the last few years, both are expected to rebound to 2016/2017 levels. The Cascade Park submarket (between SE 164th and 192nd) has been responsible for approximately half of Clark County office absorption. This is expected to slow but continue as new employment lands are developed in the area.

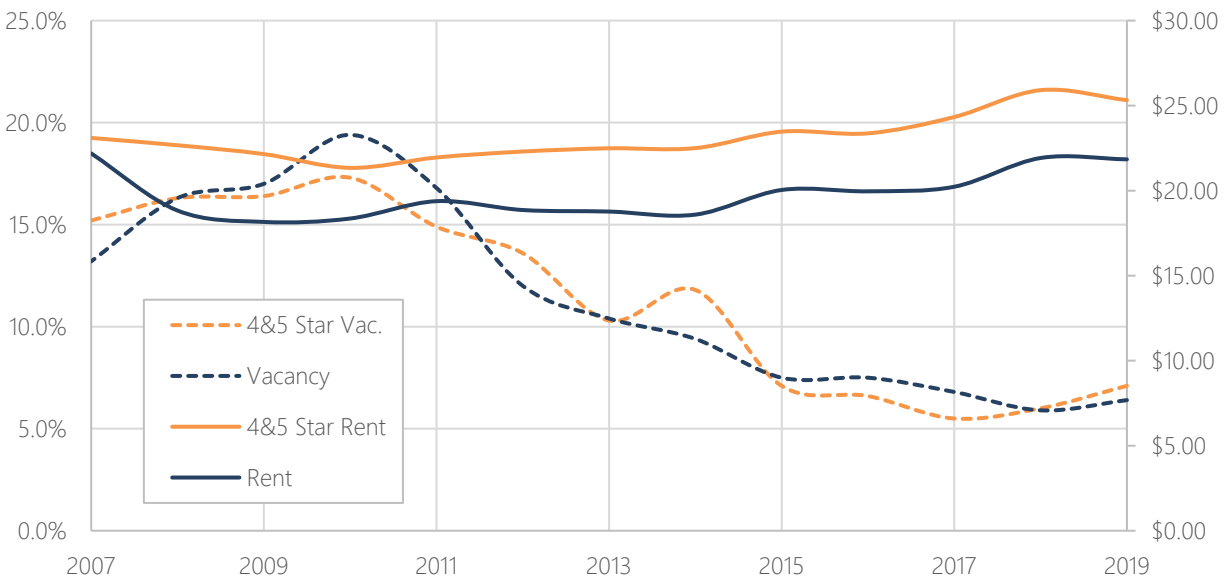
Figure 19. Office Deliveries and Absorption, East of I-205 Submarket



Source: Costar, Leland Consulting Group

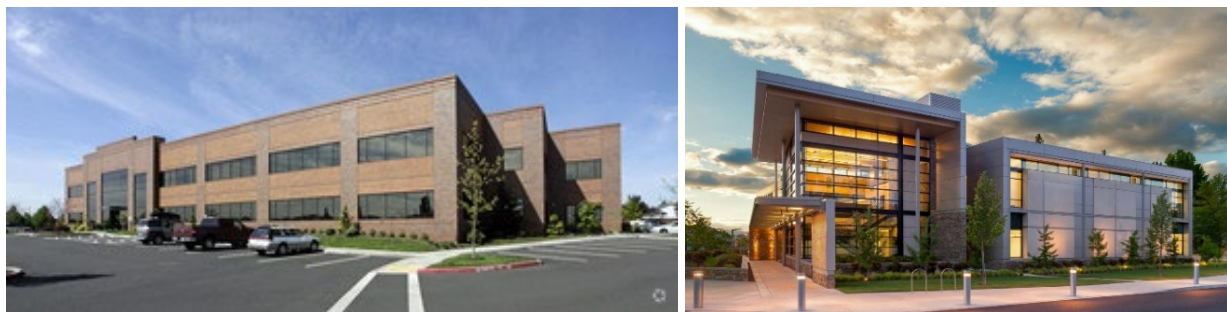
The following charts show office rent and vacancy trends. The average rent per square foot has not increased since its high in 2006. This is typical of the nation and the Portland region due to the decrease in demands, in large part, as a result the declining ratio of office space per employee and other trends previously discussed. However, high-quality office space has, on average, commanded rents about \$3.70 higher than the market average.

Figure 20. Office Rent & Vacancy, East of I-205 Submarket



Source: Costar, Leland Consulting Group

Additionally, master plan developments, such as Columbia Palisades and Columbia Tech Center, tend to command the highest rents in the region. Rents at the Columbia Palisades (proposed) are being advertised at \$40 to \$45 per square foot triple-net, and since its inception, the Columbia Tech Center has continued to rent at upwards of \$26 per square foot full-service.



Industrial Market

At mid-year 2019, the Portland industrial market slowed to negative absorption for the first time since mid-2009. Although Q2 2019 saw multiple deals completed, the number of move-outs was closely equal concluding the quarter with negative 48,253 sq. ft. of absorption. The East of I-205 submarket, on the other hand, has displayed

improving market conditions for industrial development, with increasing year-on-year absorption and construction starts, as well as a lower vacancy rate than the Portland metro region.

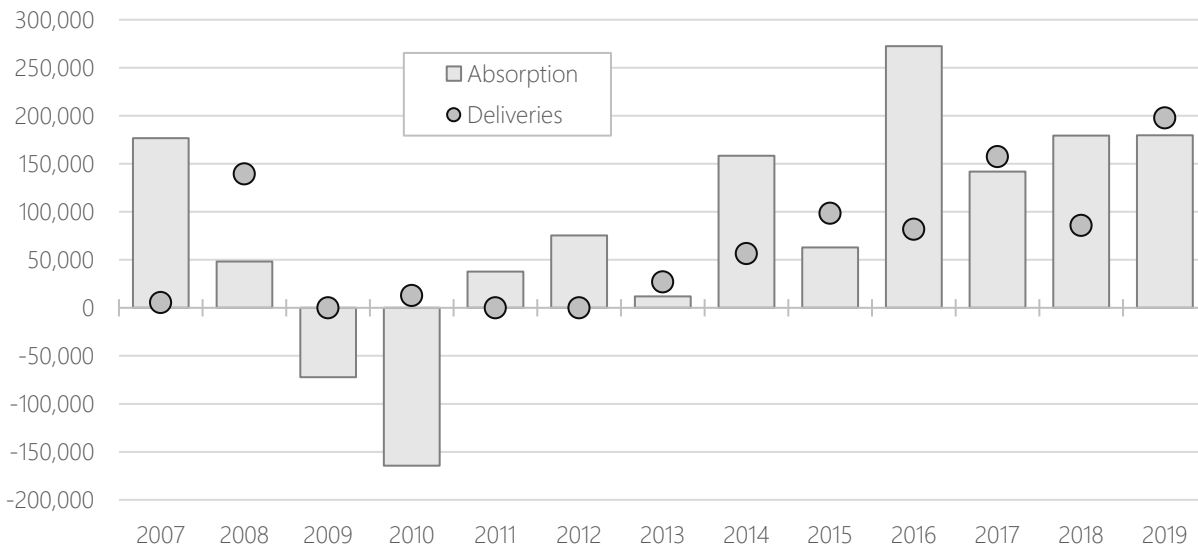
Table 7. Industrial Submarket Trends

	Historical (2015-2019)		Projected (2020-2022)	
	Total Sq. Ft.	Annual Avg.	Total Sq. Ft.	Annual Avg.
Current Inventory (2019)	5,357,318			
Projected Inventory (2022)			5,382,318	
New Supply	621,034	124,207	25,000	8,333
Absorption	836,034	167,207	593,508	197,836
Over/Under Supply	215,000	43,000	568,508	189,503
Rent Growth		7.2%		
Vacancy (2019)	1.4%			

Source: Costar, Leland Consulting Group

After many years of stagnant development activity, construction and absorption have been steadily increasing since 2013, as the following chart shows. The current pipeline, however, is highly constrained, potentially resulting in pent-up demand for industrial development going forward.

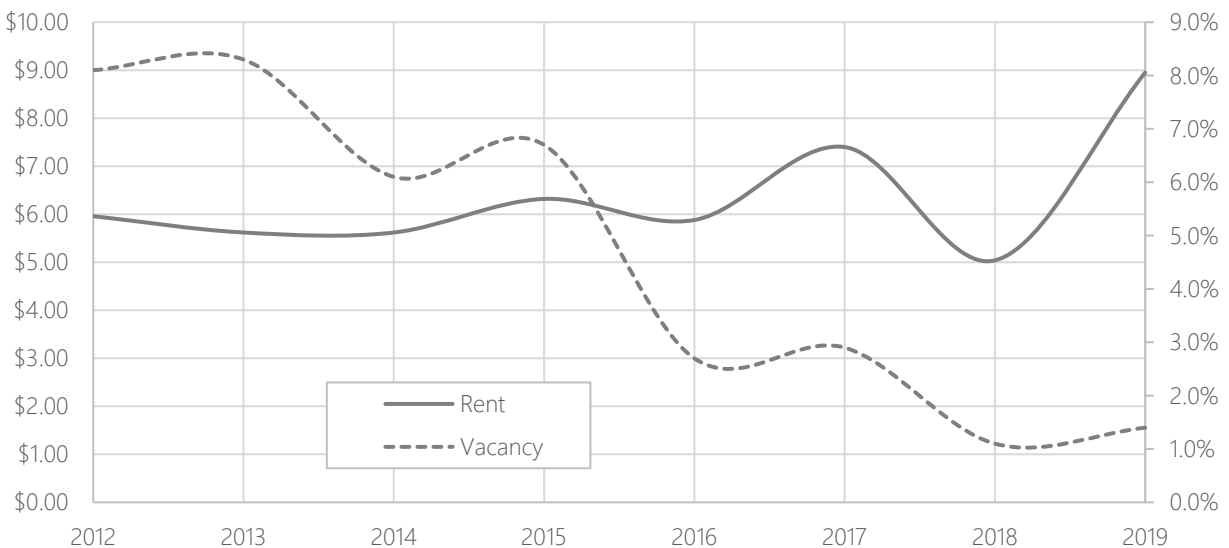
Figure 21. Industrial Deliveries and Absorption, East of I-205 Submarket



Source: Costar, Leland Consulting Group

As the following chart shows, rent growth has been constrained but has recently responded to drastic declines in the vacancy rate, which in 2018 hit a 10-year low. This would appear to indicate reasonable demand for new industrial development.

Figure 22. Industrial Rent & Vacancy, East of I-205 Submarket



Source: Costar, Leland Consulting Group

Flex Space

Flex space is a term used for lightly zoned buildings. It is mainly used when referring to industrial or office space.

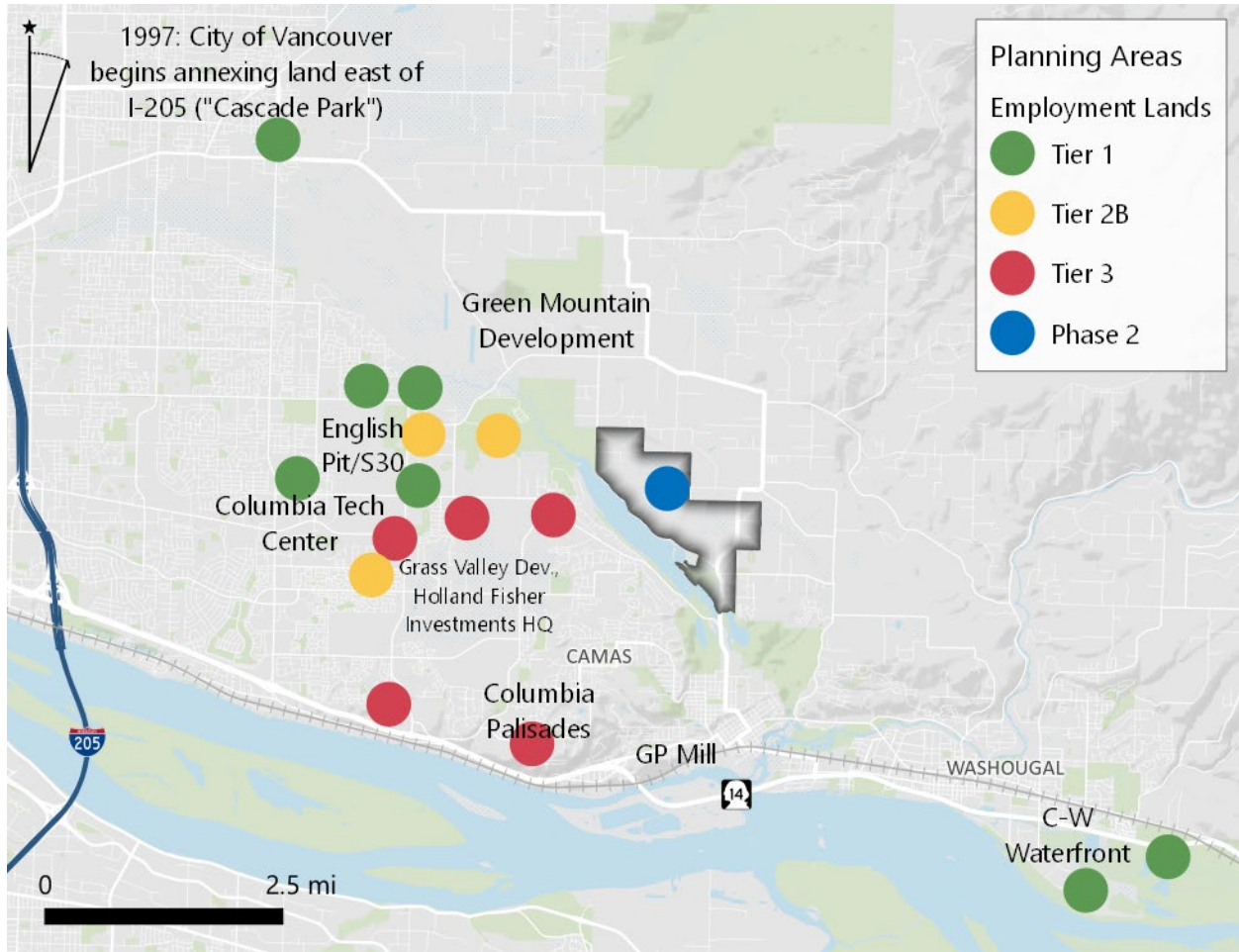
- There is an additional 1.6 million square feet of flex space in the submarket, much of which is in the Columbia Tech Center.
- Flex space absorption has averaged 33,860 square feet annually and is expected to increase marginally to 43,000 square feet annually over the next few years as around 190,000 square feet of new flex space comes online, despite a vacancy rate of almost 20 percent.
- Flex rents are averaging around \$10 per square foot triple-net, about 50 percent higher than average industrial rents.

EMPLOYMENT AREAS AND LAND SUPPLY

With vacancies for both office and industrial development at or nearing historic lows, demand appears strong for additional industrial and office space. Employment growth is expected to continue in this area, so it is important to understand the availability and timing of the development of existing and planned employment areas.

Several other significant planned project areas in this region will greatly increase employment and commercial employees, amenities, and building square footage, and also provide more competition for the Camas North Shore. These project areas are identified in the map below and profiled in the following text.

Figure 23. CREDC Employment Lands Sites, East of I-205 Submarket



Columbia Tech Center

The Columbia Tech Center (CTC) is a 450-acre, master-planned employment center offering around four million square feet of retail, office and flex/office space, single-family and multifamily homes and other amenities (shown in the charts below). Given the preliminary vision for the Camas North Shore, CTC appears to be an appropriate case study to profile.

Established in 1996, CTC received approximately \$62 million in public infrastructure investments and now employs around 8,500 people. CTC has largely been the focus of new employment-based development in east Clark County, but the Center is now close to full build-out, with only 69 acres remaining vacant for further development. With land supply now limited, there are additional pressures on potential employment lands elsewhere in the submarket.

The following charts show the land use mix by total building area and lot acreage development for the Columbia Tech Center. Both include HP (office), which was built in 1981.

Figure 24. Land Use by Total Building Area (SqFt)

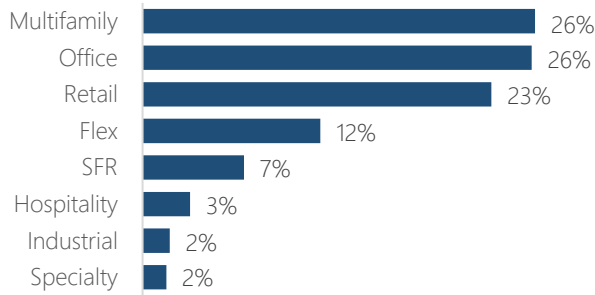
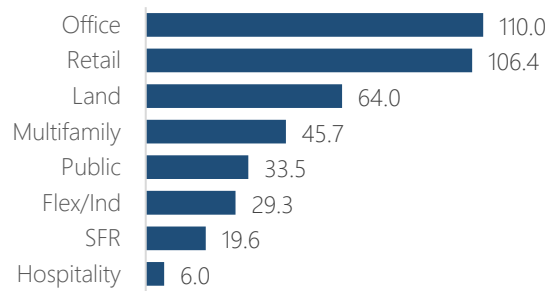


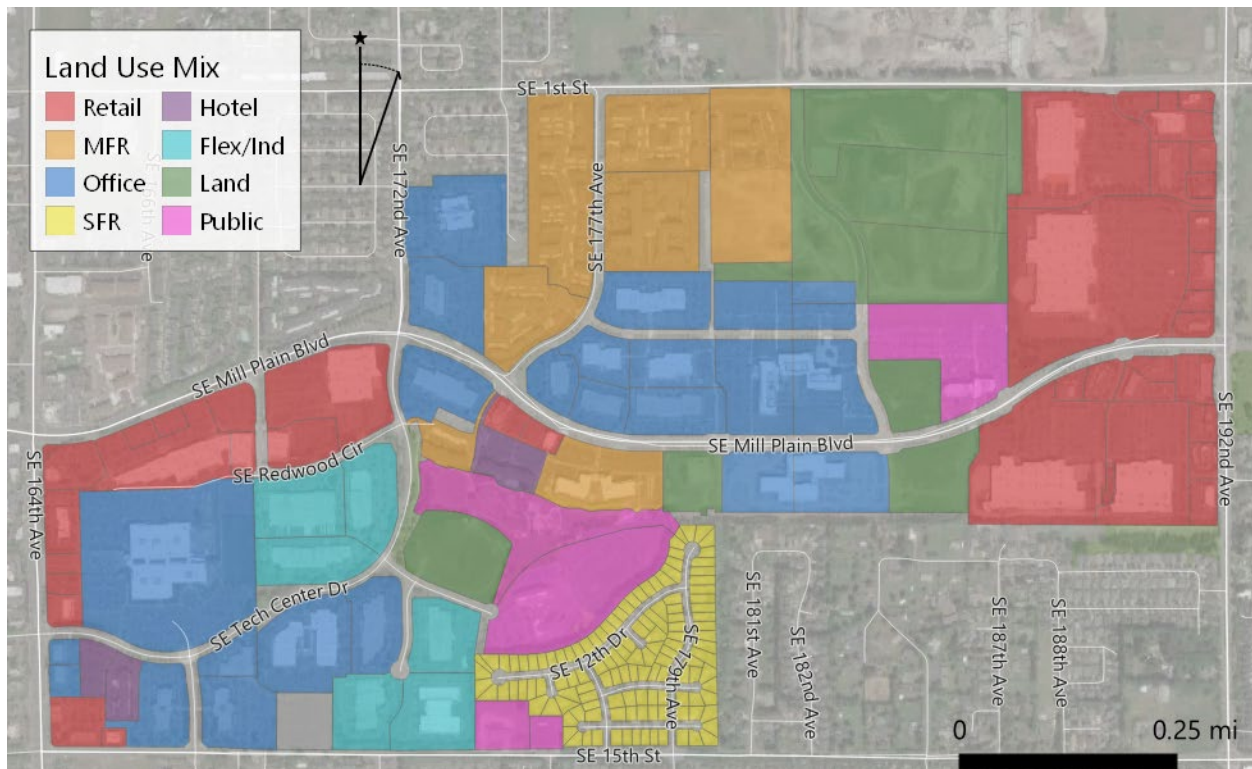
Figure 25. Land Use Mix by Acreage Developed



Source: Costar, Clark County, Leland Consulting Group

The following map shows where these land uses are placed in the Columbia Tech Center. Retail uses bookend the CTC near major nodes and arterials. Multifamily uses (which include senior housing) are clustered in a central location, as are office and flex/industrial land uses (in two locations). The Center includes several public uses, including a school, a college, a park, and a fire station. A screen capture of the CTC's home page follows. This shows that the brand of this master planned area is "Live, Work, Thrive." It is intended to be a complete community—far more than just a suburban employment center.

Figure 26. Columbia Tech Center Land Use Mix and Building Area (sq. ft.) by Location



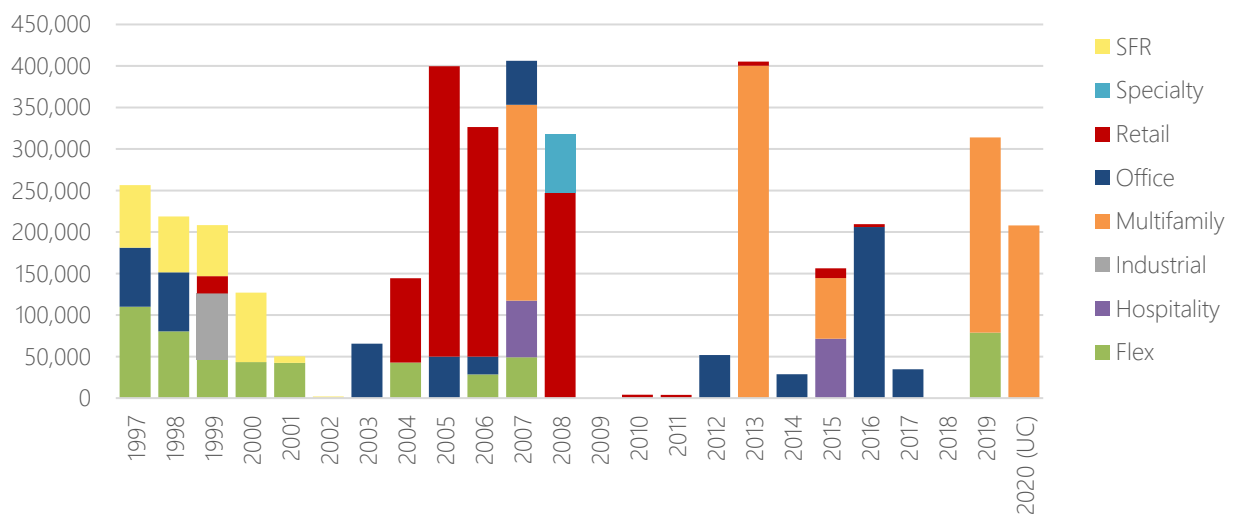
Source: Costar, Leland Consulting Group

Figure 27. Columbia Tech Center Home Page



The Center’s development occurred during some distinct cycles. Notably, it started with single-family residential and employment uses (office and flex), followed by significant retail development (presumably as the area became more populated) and some multifamily apartments. Development since the Great Recession in 2008/2009 has predominately been multifamily, in keeping with broader national trends.

Figure 28. Columbia Tech Center Land Use Mix and Building Area (sq. ft.) by Year Built



Source: Costar, Clark County, Leland Consulting Group

Other pertinent development trends for CTC include:

- Of the 450 gross acres, approximately 35 acres are right-of-way (7.8 percent), leaving 415 acres as net developable.
- Developed parcels account for 346 acres, with 64 acres or 15.4 percent of the total net still vacant.

Camas North Shore Subarea Plan | Market Analysis

- Only 25 acres were developed before 1997; 332 acres have been developed post-1997. A total of 3.9 million square feet in total building area has been built since 1997. This has averaged 11,875 square feet per acre developed (0.28 average FAR).
- The annual rate of development since 1997 has been 14.8 acres. Based on this rate, there are approximately 4.3 years of land supply remaining in CTC.
- Based on the current average FAR and remaining acreage, CTC can be expected to accommodate an additional 774,000 square feet of new development. This projection is expected to be higher if new development is multifamily residential.

The Columbia Tech Center serves as an important case study for the Camas North Shore. Approximately 544,000 square feet of “employment” uses (office, industrial, flex) were developed in the first five years of construction (109,000 square feet per year). The highest quality office construction was only built in the latter years, seemingly as the market improves, and multifamily residential has since been responsible for the bulk of new development, demonstrating the strongest market dynamics in the region.

CTC remains better positioned in the region for large-scale industrial and office, although land supply is now dwindling with less than five year’s land supply remaining. However, there is a 553-acre redevelopment site located to the immediate north of CTC, called Section 30 or the “English Pit” which appears poised to take up the mantle.

Section 30/English Pit

Section 30 is a former gravel mine turned master-planned community including a similar mix of uses to the Columbia Tech Center. Approximately 9,500 jobs are projected at full build-out.

Table 8. Section 30 Land Use Mix

Land Use	Net Acres	Dwelling Units
Traditional Retail	9 acres	
Mixed-Use Town Centers	20 acres	360 units
Town homes/Apartments	70 acres	1400 units
Office Industrial	100 acres	
Industrial	113 acres	
Subtotal	312 net acres	1760 units
Existing Uses	134 acres	
Total	446 net acres	1760 units

Columbia Palisades

The total developable land area is 51.2 acres. Percentages of developed land area by type of use are shown below. Office is the predominant land use, followed by single-family residential. Other employment uses, such as industrial, are not included in the plan. As such, the Columbia Palisades project is expected to compete directly with the Camas North Shore developments for office and residential prospects.

Figure 29. Columbia Palisades Conceptual Development Plan



CREDC Employment Lands

Columbia River Economic Development Council (CREDC) conducted an employment land study as an economic development and policy tool for civic leaders and policymakers. The study moves beyond a quantitative inventory of land availability and considers the challenges of developing large and complex sites with considerable development constraints. The tool has been used by leaders in other communities to attract new investment, align land supply with the needs of firms looking to locate or expand, and to develop policies that remove costly barriers to development that threaten economic growth and prosperity.

- The Study identified 56 employment sites that are 20 acres and larger throughout Clark County (see Figure 23 on page 35). The site inventory identifies a tier for each site and considers the market, land use, and physical characteristics to assess site readiness. This Study can be used as a tool to inform policymakers about opportunities and constraints for employment development and provides strategic infrastructure estimates. The Study does not recommend public investment in specific infrastructure projects or result in any regulatory actions on the properties studied. Phase 2 of the Study uses a conceptual depiction of an employment use on select study sites to assess site characteristics but does not propose any development action.
- CREDC identified the North Shore area as a Phase 2 site, selected for further analysis. Immediately to the west of Lacamas Lake in east Vancouver and west Camas, there are several sites identified by CREDC as prime locations for near-term development to support employment growth. These sites are likely to absorb demand for industrial and office construction sooner than the Camas North Shore site (designated a Phase 2 site by CREDC).
 - Tier 1: six months to development ready.
 - Tier 2B: 13 to 30 months to development ready.
 - Tier 3: more than 2.5 years to development ready.
 - Phase 2: selected for further analysis.

RESIDENTIAL MARKET

A 2019 Housing Market Outlook report from Penrith Home Loans in Vancouver is projecting that two mortgage interest rate hikes will happen during the year, with rates eventually topping 5.5 percent. The rates are still near historic lows, but they're starting to tick upwards.

The report also projects moderate housing inventory growth of less than 7 percent, a shift from luxury- to entry-level construction and a slowdown of appreciation, with median home prices rising 2 to 3 percent.

Nationally and regionally, there's pent up demand around Millennial-aged buyers—which make up the largest sector—looking for affordable homes. Boomers, on the other hand, are downsizing and many of the Gen-X generation is now moving up to larger homes.

Multifamily Residential

The majority of multifamily construction activity has been taking place within the city limits of Vancouver. The remainder of Clark County consists primarily of single-family housing (See Appendix B for graphical depictions of building permit activity from 2009 – 2018 in Clark County, Vancouver, and Camas/Washougal).

- Since 2013 almost three-quarters of all Clark County multifamily building permits have been issued in the City of Vancouver.
- During this period, there were almost no multifamily building permits issued in the City of Camas.
- In the last six years, almost every single building permit in Camas has been for single-family homes.
- Residential building permits in Clark County has averaged 3,225 units per year in the last six years (2013 through 2018)
 - Annual average – 2,171 single-family (67 percent)
 - Annual average – 1,054 multifamily (33 percent)
- 2017 was the banner year for new apartments in the last two decades (1,707 units), exceeding the annual average of the previous five years by 62 percent. In 2018 multi-family building permits dropped back to the historical average of the previous five years (805 units per year).
- Except for the development taking place on the waterfront in downtown Vancouver, new multifamily construction is expected to slow in the future because of rising land and construction costs, which are forcing rents for new apartments above affordable levels.

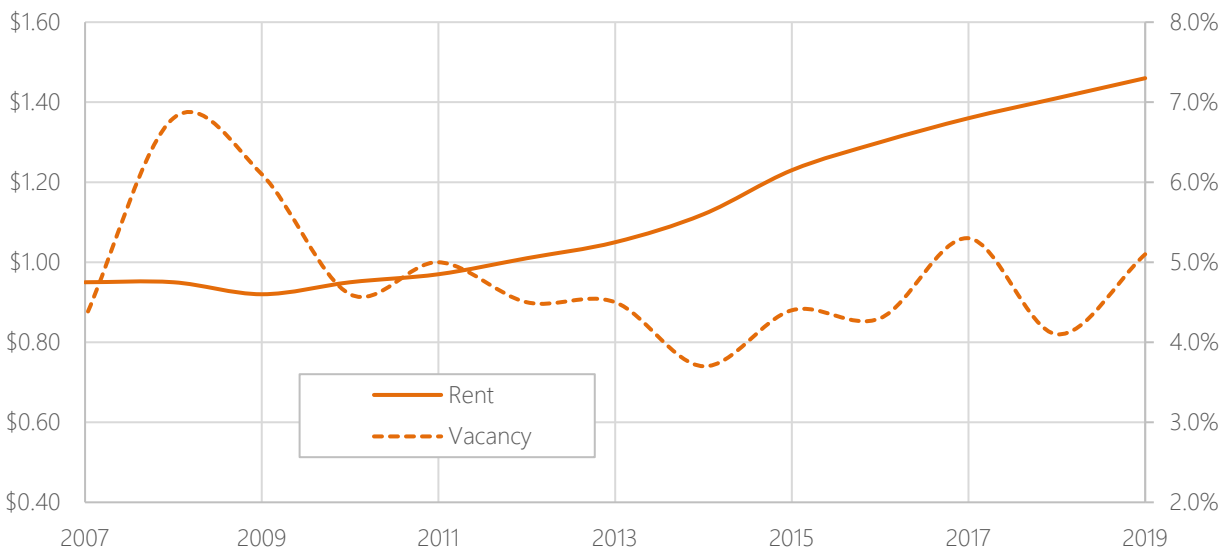
Table 9. Multifamily Submarket Trends

	Historical (2015-2019)		Projected 2020-2022)	
	Total Units	Annual Avg.	Total Units	Annual Avg.
Current Inventory (2019)	13,552			
Projected Inventory (2022)			14,197	
New Supply	1,844	369	645	215
Absorption	1,607	321	733	244
Over/Under Supply	(237)	(47)	88	29
Rent Growth		3.5%		
Vacancy (2019)	5.1%			

Source: Costar, Leland Consulting Group

A vacancy rate of five percent or under indicates demand for additional multifamily development. Vacancies have remained at or below that five percent threshold since the Great Recession, despite substantial construction growth. During this same time, average rents have continued to increase.

Figure 30. Multifamily Apartment Rent & Vacancy, East of I-205 Submarket



Source: Costar, Leland Consulting Group

A selection of the highest renting projects in the submarket is profiled below. These projects show that new apartment projects can achieve rents upwards of \$2.00 per square foot, 37 percent above the market average. Common characteristics among all examples include low- and mid-rise building types at no higher than four stories, no ground floor retail, and surface parking.

Considering the relatively recent construction of these projects, we presume that these rents can support a similar type of development in the Camas North Shore, but a more dense or mixed-use development may require higher rents to be financially feasible.

The Landing at Vancouver (100 SE Olympia Dr)

- 250 units built in 2019.
- \$1.97 per square foot asking rent



Parkside Lofts (17701 SE Mill Plain Blvd)

- 91 units built in 2015
- \$2.37 per square foot asking rent

The Club at the Park (17775 SE Mill Plain Blvd)

- 206 units built in 2019
- \$2.21 per square foot asking rent

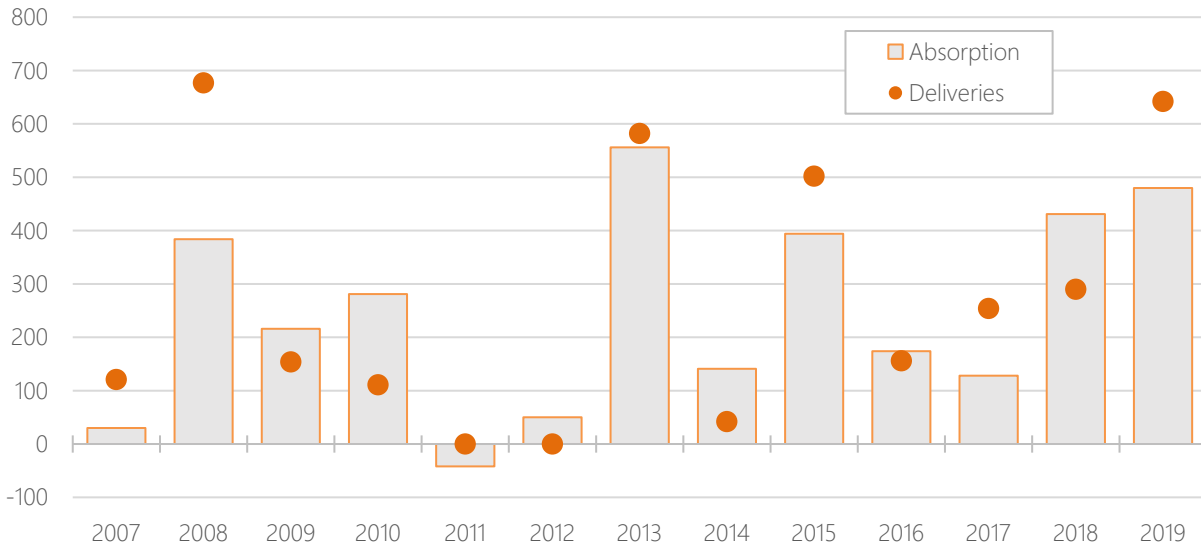


Trio Pointe (19600 NE 3rd St)

- 240 units built in 2017
- \$1.83 per square foot asking rent

The following chart shows multifamily construction and absorption trends for the submarket. Absorption has largely kept pace with new deliveries, indicating continued demand for apartments.

Figure 31. Multifamily Apartment Deliveries and Absorption, East of I-205 Submarket



Source: Costar, Leland Consulting Group

Single-family/Ownership Housing

The market for ownership housing is very active and deep in Clark County generally, and the Camas/Washougal submarket specifically.

Absorption has been very high for all homes less than \$400,000 or \$500,000. There is only 3.1 months of standing inventory across all housing types and prices, and significantly less for more affordable homes. Anything less than six months of standing inventory indicates significant demand for owner-occupied homes.

Currently, developers are not constructing wood frame stacked condominiums because of the long-term legal liability in the State of Washington for construction defects. Because condominiums often have active and aggressive homeowner associations, developers view a wood frame condominium in today's market as risky.

Table 10. 12-month Homeownership Sale Trends & Active Listings

Home Price	Closed Sales	Percent of Total	Absorption (Units Sold per Month)	Active Listings	Months of Inventory
Single-Family					
Under \$200k	29	1%	2.4	1	0.4
\$200k to \$300k	323	13%	26.9	14	0.5
\$300k to \$400k	987	40%	82.3	99	1.2
\$400k to \$500k	572	23%	47.7	199	4.2
\$500k to \$600k	245	10%	20.4	142	7.0
\$600k to \$700k	122	5%	10.2	82	8.1
\$700k to \$800k	85	3%	7.1	35	4.9
\$800k to \$900k	27	1%	2.3	14	6.2
\$900k to \$1m	19	1%	1.6	5	3.2
\$1m to \$1.5m	21	1%	1.8	22	12.6
\$1.5m +	10	0%	0.8	19	22.8
Single Family Total	2,440		203	632	3.1
Townhomes					
Under \$200k	1	1%	0.1	0	0.0
\$200k to \$300k	51	41%	4.3	3	0.7
\$300k to \$400k	61	50%	5.1	29	5.7
\$400k to \$500k	9	7%	0.8	13	17.3
\$500k to \$600k	1	1%	0.1	4	48.0
Townhome Total	123		10	49	4.8
Condos					
Under \$200k	51	32%	4.3	3	0.7
\$200k to \$300k	70	44%	5.8	8	1.4
\$300k to \$400k	12	8%	1.0	4	4.0
\$400k to \$500k	5	3%	0.4	4	9.6
\$500k to \$600k	11	7%	0.9	10	10.9
\$600k to \$700k	2	1%	0.2	0	0.0
\$700k to \$800k	6	4%	0.5	1	2.0
\$800k to \$900k	1	1%	0.1	0	0.0
Condo Total	158		13	30	2.3
All Housing Types	2,721		227	711	3.1

Source: Redfin (September 2019), Leland Consulting Group

COMMERCIAL MARKET

This section refers to the retail primary trade area (a smaller area than the submarket), defined as the area to the north and east of Lacamas Lake. Lodging uses are also included as a commercial use in this section.

Retail Trends

There is no other land use that changes as often and as dramatically as retail. Retail shopping formats, shopping centers and other types of consumer goods outlets are constantly evolving.

- Currently, the goods-based consumer retail industry is undergoing a seismic shift and transformation. Big-name retailers are declaring bankruptcy and closing hundreds of stores as online purchases grow and American buying habits change.
- Last year saw a record number of store closings. This is having a trickle-down effect on communities, as some see their brick-and-mortar retail bases slowly eroding, with impacts felt in shopping centers and along traditional Main Streets.
- Planners in some cities are taking proactive approaches to the shifting retail landscape. They're commissioning studies of the marketplace and developing new strategies to maintain and foster better retail environments.
- Retailers offering a special experience, or offering services that cannot be procured online, have the potential to thrive.
 - A prime example is dining. Food and beverage establishments have become a larger part of the retail experience.
 - Another growing "retail" sector is healthcare. Small, neighborhood-scale providers are moving into retail center locations.

Given the city's vision for the area, as detailed in the comp plan, the dwindling prospects for traditional big-box brick-and-mortar retail is less concerning. Food and beverage establishments, as well as grocery, will remain in demand and will continue to grow as population and jobs increase in the area.

The Rise of Ecommerce

Despite all of the different evolving types of "bricks and mortar retail" the primary type of retail that is having the greatest impact on shopping and retail supply is ecommerce.

- Between 2001 and 2015, online retail sales grew 22 percent annually and accounted for 22 percent of total retail sales growth.
- During the same period, brick and mortar stores grew only 3.7 percent annually. Market share decreased from 98 percent to 89 percent.
- While market share is still relatively small in comparison, estimates indicate up to 20 percent of total U.S. sales will be through ecommerce by the end of 2019.
- The rapid growth of ecommerce has significantly slowed the growth of other types of retail. In many areas of the country. Without rapid population growth, bricks and mortar retail demand will decline.

Local Retail Market

Retail trends are shown in the following table and figures. Absorption has been relatively strong over the past five years, totaling 565,000 square feet while only 364,000 square feet of new space was built, resulting in a decreasing vacancy rate. However, planned, under construction, and proposed projects between 2020 and 2022 total 623,000 square feet, while absorption is forecasted at 270,000 square feet. If all or most of this projected supply gets built, vacancies will increase once more.

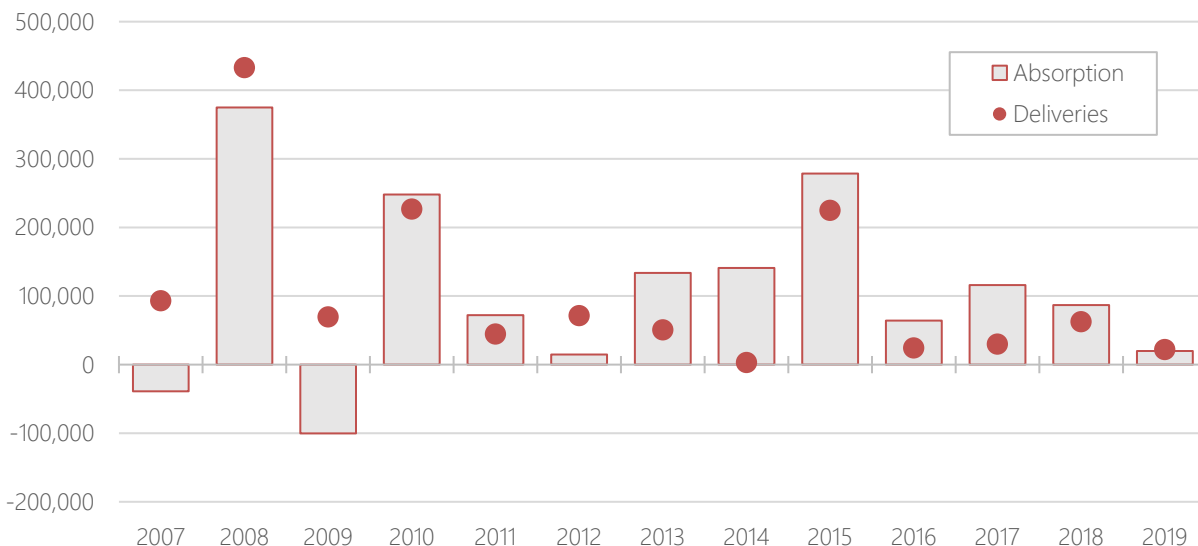
Table 11. Retail Submarket Trends

	Historical (2015-2019)		Projected 2020-2022)	
	Total Sq. Ft.	Annual Avg.	Total Sq. Ft.	Annual Avg.
Current Inventory (2019)	7,563,753			
Projected Inventory (2022)			8,186,723	
New Supply	363,656	72,731	622,970	207,657
Absorption	565,287	113,057	266,917	88,972
Over/Under Supply	201,631	40,326	(356,053)	(118,684)
Rent Growth		0.7%		
Vacancy (2019)	3.2%			

Source: Costar, Leland Consulting Group

The following shows historical retail absorption and deliveries for the submarket. Construction starts have slowed over the past several years, reminiscent of an industry currently in flux (see national retail trends). Absorption has fallen by more than 60 percent since the high of 2015 and has continued to decline into 2019.

Figure 32. Retail Deliveries and Absorption, East of I-205 Submarket

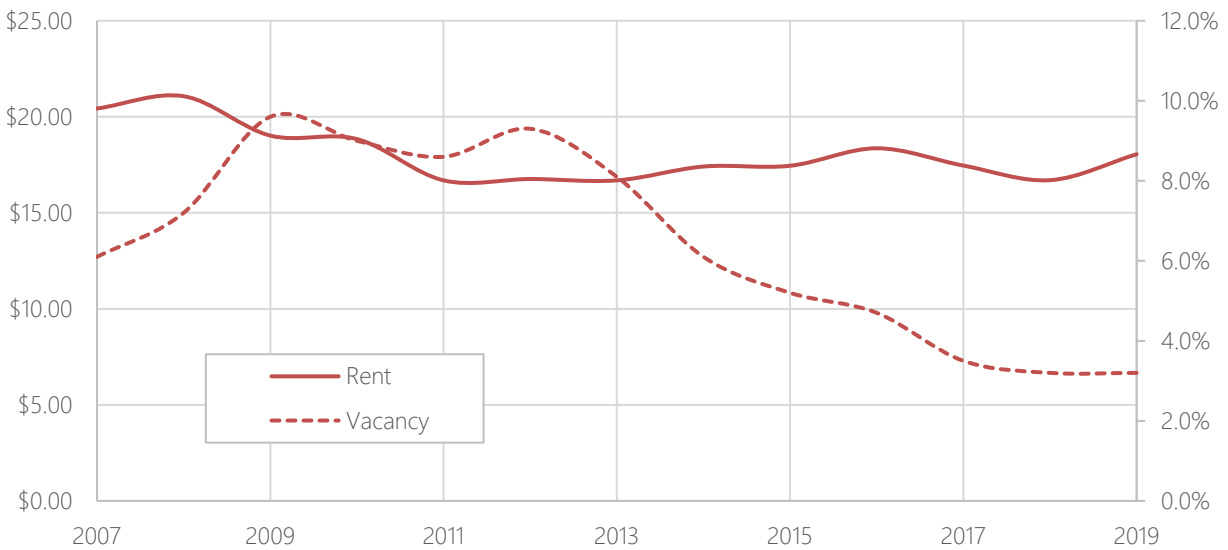


Source: Costar, Leland Consulting Group

Retail and vacancy trends are shown below. Since the recession, the vacancy rate has fallen from a high of 10 percent in 2009 to only 3 percent in 2019, indicating the overall market is undersupplied. However, retail

demand and vacancy are location specific and can vary considerably by submarket and city. From 2009 to 2018 average rents per square foot have remained relatively static at approximately \$19 per square foot triple net.

Figure 33. Retail Rent & Vacancy, East of I-205 Submarket

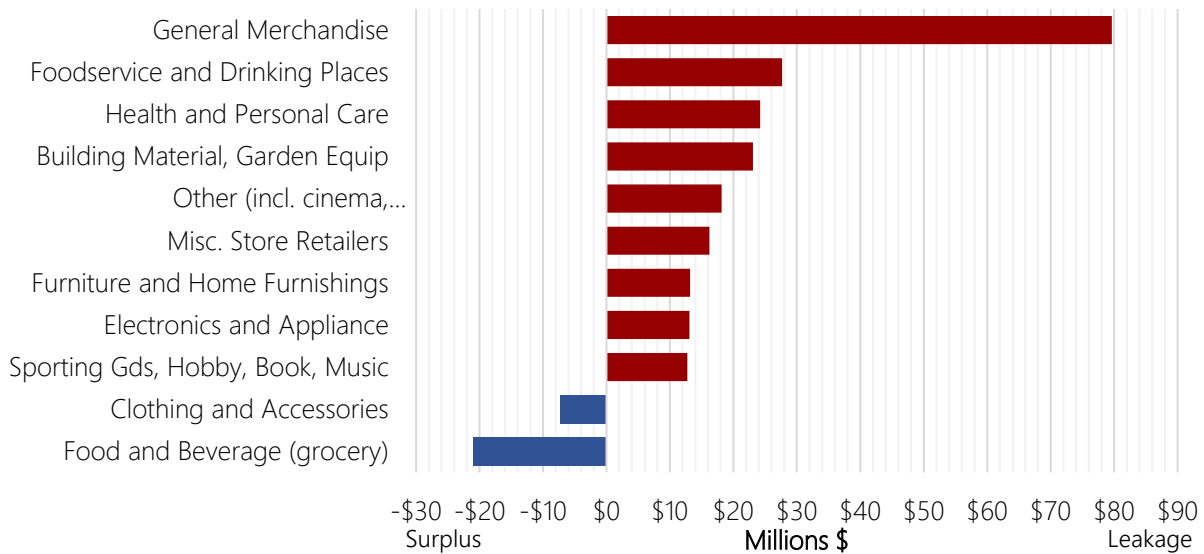


Source: Costar, Leland Consulting Group

Current household spending patterns are presented in the following leakage chart. Retail leakage occurs when household spending is not captured within the defined trade area. When local demand for a specific product is not being met within a trade area, consumers are going elsewhere to shop, creating retail leakage.

- The most substantial leakage is seen in the General Merchandise retail category. The submarket is unlikely to recapture a significant proportion of this spending leakage due to the proximity to Oregon, where there is no sales tax. Oregon’s proximity generally has had a dampening effect on retail demand in Clark County, especially for commodity retail products.
- Community-serving retailers, such as restaurants, grocery stores, and health stores are likely to make significant inroads in recapturing existing leakage. As such, the highest percentage of leakage recapture can be expected in food service and drinking establishments, which tends to have a much smaller trade area than other retail categories as people generally like to dine out and drink locally.
- Grocery appears to be outperforming other retail sectors, attracting more spending than current household demand. As one of the most easterly urban locations, the trade area may be drawing people further east and north than the trade area boundaries extend. With this said, future grocery demand is unlikely to be hampered by this current surplus. Retailers tend to consider household growth of 5,000 to be a target number for additional grocery stores.

Figure 34. Retail Primary Trade Area* Leakage



Source: ESRI, Leland Consulting Group

*Defined as a 10-minute drive area west and extends east beyond the Clark County line to the midway point between Camas North Shore and North Bonneville, as shown in the Economic Overview section.

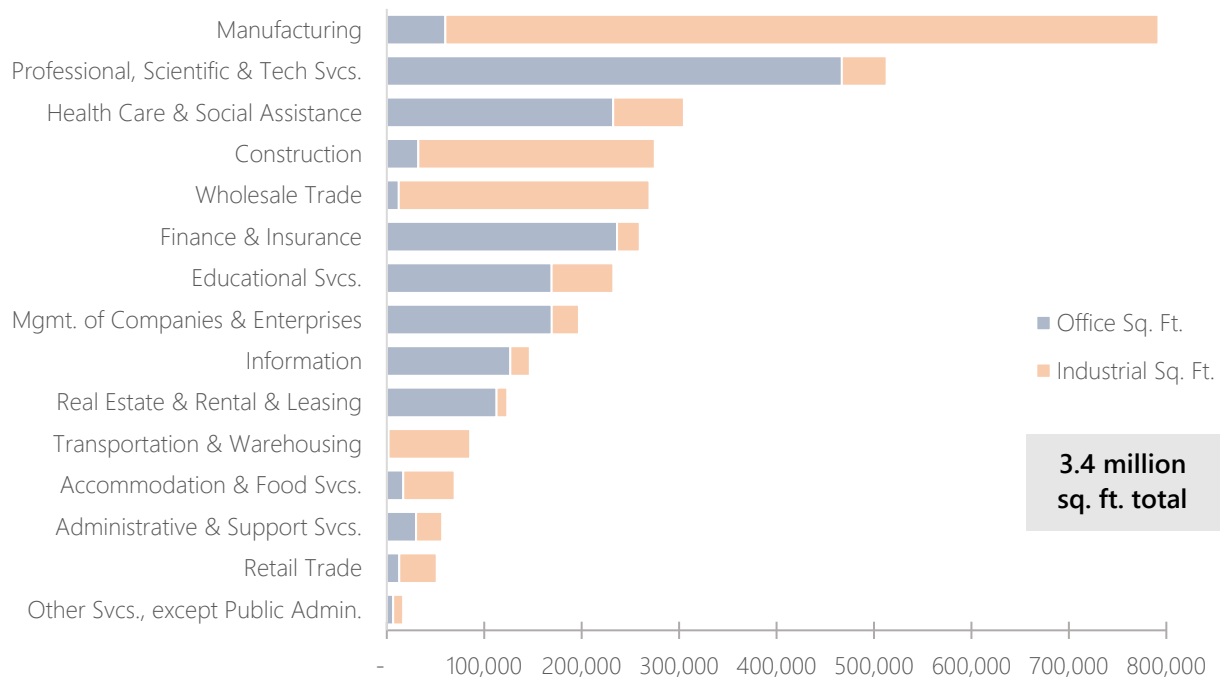
Demand Forecast

EMPLOYMENT (OFFICE AND INDUSTRIAL) DEMAND

The East of I-205 submarket is projected to see about 3.4 million square feet of new office and industrial development. This is likely a relatively conservative estimate, which is based on an anticipated 2.0 percent annual employment growth in the area. Construction data for the past five years indicate that around 4.3 million square feet of new employment-based development would be in line with historical trends.

Projected growth in the industries of professional, scientific, and technical services, healthcare, and finance and insurance is likely to drive demand for new office construction. Industrial construction is likely to be driven by growth in the industries of manufacturing, construction, and wholesale trade. A relatively even split (1.69 million square feet office, 1.72 million square feet industrial) is expected.

Figure 35. 20-year Projected New Office and Industrial Demand*



Source: Leland Consulting Group
 *Industries expected to use 10k sf or more shown

Office. Based on past employment growth in east Clark County, demand for office space should be healthy, and sites in the North Shore will provide opportunities for new mid-rise office buildings. The site also lends itself well to large, institutional uses that have characteristics similar to office complexes. Technical schools and medical facilities are potential uses for the North Shore and could accelerate the time horizons for the development of the site.

Industrial. Industrial uses in the Camas North Shore area will likely take two forms—light industrial buildings and “tech/flex” buildings. Warehouse/distribution is not envisioned as a likely use on the site because this industry typically prefers to be near freeways. In addition, warehouse/distribution generally creates relatively few jobs per acre and is not conducive to developing an urban environment. Demand for light industrial or tech/flex buildings will likely be strong as national demand continues. Shortages of industrially designated lands within the Vancouver/Portland metropolitan area put Camas and the North Shore area in a good position to capture a healthy portion of future growth.

The North Shore also presents the opportunity to support development on larger (50 acres plus) sites. In the Vancouver/Portland metropolitan area, there continues to be a shortage of larger, unfragmented sites that could accommodate large industrial facilities, similar to the large industrial land users already in east Clark County.

North Shore Capture Rate. While significantly more land is available—per the comprehensive plan designation—for “business park” and other employment uses in the Camas North Shore, we anticipate the area to capture as much as 1.4 million square feet of office, industrial, and flex building space, which would equate to approximately 33 to 40 percent of projected submarket demand.

Given that the Columbia Tech Center—probably one of the most appropriate case study sites for the North Shore—captured between one-quarter and one-third of new submarket construction in recent years, 33 to 40 percent for the Camas North Shore still seems to be an aggressive goal.

Planned and Proposed Employment Projects

Major employment lands in the submarket that are likely to compete for new development with the North Shore include Section 30 (the “English Pit”) and the remaining 60 acres at Columbia Tech Center. Section 30 includes approximately 213 acres of land for office and industrial development. Between these two major centers, around two million square feet of new employment-based development could be built in the market over the next two or three decades. These sites are likely in a more competitive, accessible, and prominent location.

The Columbia Palisades development is also expected to feature significant office development, yet the scale and quantity remain unknown (the current plan describes 84.2 acres of luxury residences, offices, parks, a hotel, a modern outdoor shopping mall).

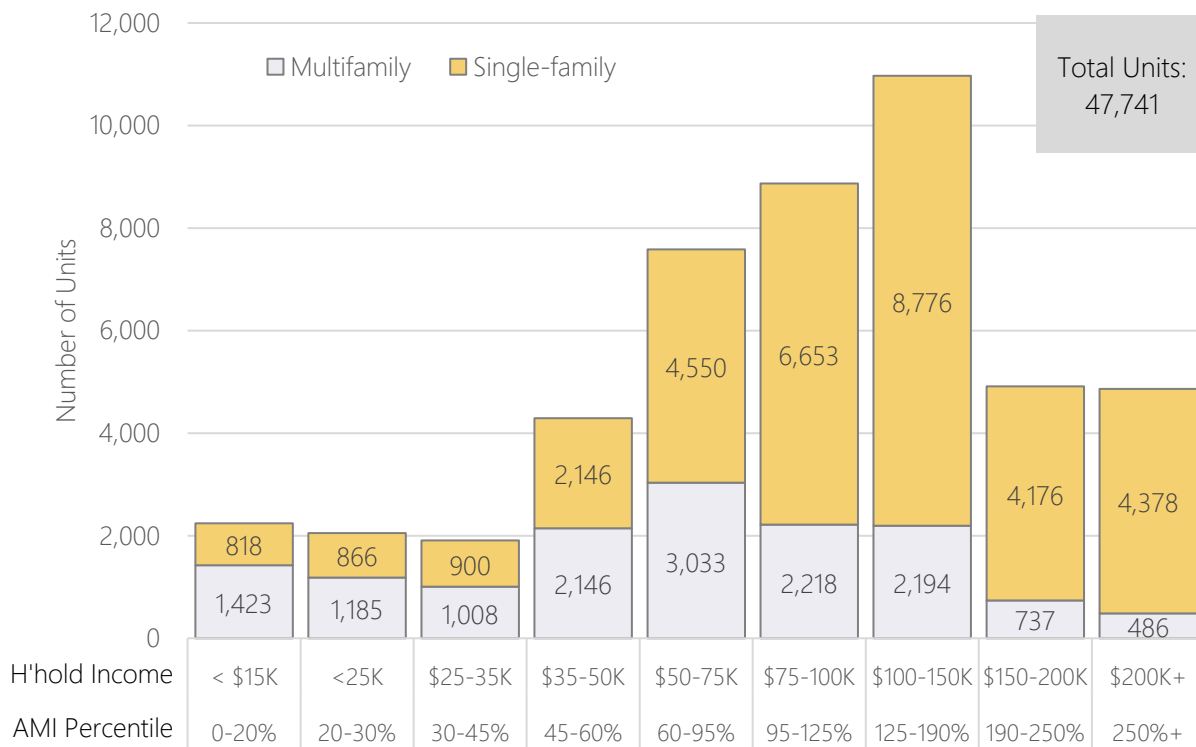
Smaller-scale projects include Stonemill Center near Mill Plain Blvd and 136th Ave, a proposed 100,000 sf, four-story office building.

RESIDENTIAL DEMAND

In keeping with past trends in the area, housing is likely to be an integral component of a new urban center in the North Shore area. Demand for residential is stronger than the demand for employment and retail uses but is not likely to be a dominant use given that the existing regulatory structure supports more of an employment center.

Based on a projected annual growth rate of 1.96 percent, we forecast demand in the East of I-205 submarket for approximately 47,700 additional residential units over the next 20 years. In the first decade, approximately 21,500 units are projected, with 6,500 multifamily and 15,000 single-family units.

Figure 36. 20-year Projected Residential Demand, Submarket



Source: Leland Consulting Group

The Camas North Shore is expected to capture a small proportion of submarket growth, due to the sheer number of proposed housing projects forecasted for the next decade. In fact, **the North Shore may only capture up to four percent of submarket demand over the next decade (approximately 1,900 units)**, incorporated in single-family structures, attached townhomes and multiplexes, and apartments. Some opportunities for vertical mixed-use may be likely at major nodes, although existing rents may not support this type of development in the near-term.

Initial construction is likely to follow the trend seen at the Columbia Tech Center, where development was cyclical and single-family homes were built about 10 years before substantial multifamily development. Existing demand for single-family is strong in Camas, and a glut of multifamily units is expected in the coming years.

As investments are made in the area, such as transportation infrastructure, parks, and added amenities over the next decade, we expect the area to see a greater degree of multifamily construction.

Planned and Proposed Residential Projects

Many large residential developments are underway or in the final stages of planning in east Clark County. These include Section 30 (1,800 units), Green Mountain (1,300 to 1,800 units), a single-family subdivision east of Green Mountain (400 units), and others. Other, smaller-scale planned, and proposed projects include:

- Port of Camas-Washougal development,
- Grass Valley – 276 units in 12 apartment buildings, Camas,
- Parkside Lofts Phase 2 – 208 units near Mill Plain Blvd, Vancouver,

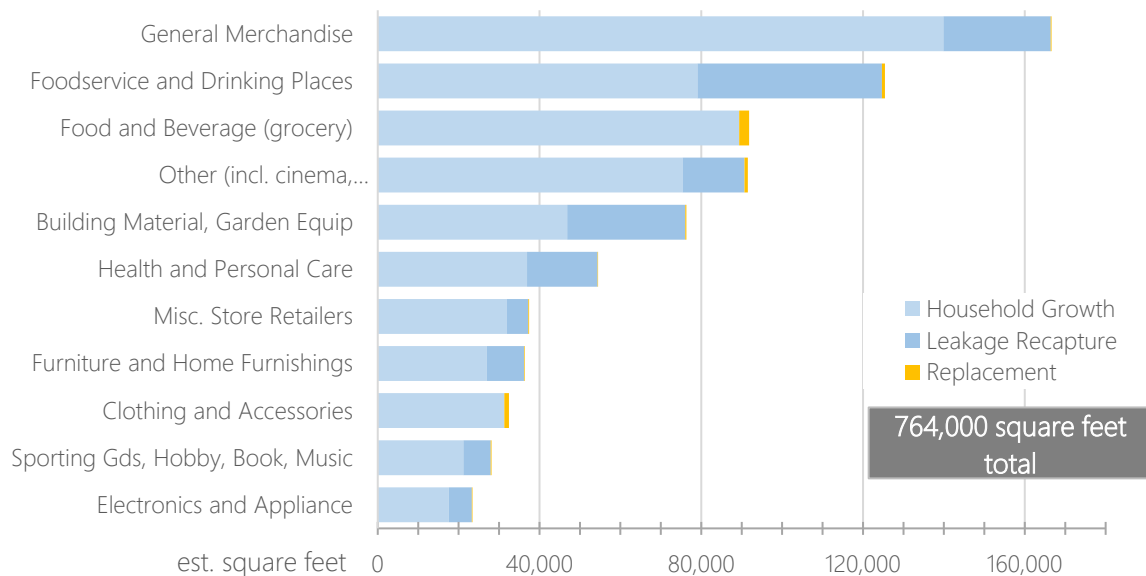
- Villas on 28th Street – 170 units in Vancouver,
- Affinity at Vancouver – 170 units due in June 2020, and
- The Landing at Vancouver – a proposed retirement community.

COMMERCIAL (E.G., RETAIL) DEMAND

Household and, to a lesser extent, employment growth are the primary drivers of demand for new retail construction.

Based on an estimated household growth rate of 1.96 percent, we project demand for approximately 764,000 square feet of retail over the next 20 years in the primary trade area.

Figure 37. 20-year Demand Forecast for New Retail Development, Primary Retail Trade Area



Source: Leland Consulting Group

Due to its location on the urban edge of the metropolitan region, lack of visibility and challenging access, lack of existing households, and prominent retail services nearby to the west, the North Shore is not likely to be a major retail center, but retail at a more neighborhood scale. There will be demand for small-scale retail along the perimeter arterial to serve new development and the adjoining neighborhood.

Retail will largely be driven by the pace of residential development, both in the immediate North Shore vicinity and in the broader east Clark County region.

The Camas North Shore could conceivably capture about one-third, or 240,000 square feet, of demand for additional retail development in the primary trade area over the next two decades. The primary competition includes downtown Camas, the Port of Camas-Washougal, Green Mountain Urban Village, and other future projects that arise.

Planned and Proposed Retail Projects

The primary retail competition is the planned Green Mountain development. While the project is largely residential, it includes 9.04 acres of well-located land for retail development. This is likely to be mid-box development. Plans also include 16 acres designated for apartments, which could involve some mixed-use structures.



SITE SELECTION CRITERIA

As the City of Camas proceeds in this process of identifying development opportunities for the Camas North Shore area, it is important to acknowledge the primary criteria that various tenants typically look for in a site when making relocation and development decisions. The following table summarizes the key site selection criteria for industrial, office, and retail users. The remainder of this document summarizes the conditions that will either attract or repel development attention from the area.

Table 12. Typical Key Site Selection Criteria for Office, Industrial, and Retail Developers and Tenants

Office	Industrial	Retail
<ul style="list-style-type: none"> • Availability of “talent”—a large, educated, skilled workforce in close proximity • High capacity transportation facilities and service, including auto, transit, bicycle, pedestrian, etc. • Infrastructure (sewer, water, stormwater, electricity, internet) • Proximity to business cluster: clients, collaborators, suppliers, vendors, and competitors • Proximity to executives’ residences • Access to amenities: open space, trails, views, local-serving retail • Labor costs/demographics • Reasonable access to air travel • Rental rates/occupancy costs • Cost of doing business including taxes, fees, energy cost, development incentives • Low crime • Floor plate size 	<ul style="list-style-type: none"> • High capacity transportation facilities and service, particularly for freight and autos; if possible, for transit, bicycle, and pedestrian. • Large parcels, flat, buildable land • Direct access to major freeway(s) • Proximity to airport(s) • Availability of skilled labor/quality workforce • Labor costs/demographics • Telecommunication infrastructure • Cost of doing business including taxes, fees, energy cost, development incentives • Proximity to major and/or prominent target markets • Minimal potential future conflicts (e.g., with residential) • Environmental conditions 	<ul style="list-style-type: none"> • High population- and employment-growth markets • High income markets/high levels of discretionary spending • High traffic volumes and flow direction • Good visibility and easy accessibility • Maximum street frontage • Parcel size • Parking availability • Short time to market • Minimal direct competition • Real estate and energy costs • Demand for product and/or existing leakage • Gap in existing market • Political acceptance • Presence or potential presence of desirable covenants • Regulatory flexibility

Source: Leland Consulting Group

Next Steps

This market analysis is just one part of the North Shore Subarea Plan. The City, Camas residents, and planning consultants will continue to work on the plan during 2020, and to define the vision for the North Shore, and specific action steps to achieve this vision. Part of the work ahead includes reviewing this market analysis and determining how the analysis and findings should be integrated into the planning process. Population and employment growth, and the real estate market, are only some of the inputs that should be taken into account when completing a subarea plan. These inputs must be weighed alongside other considerations, such as the community’s vision, topography and physical planning, infrastructure demands and budgets, etc.

During “Phase 2” of the subarea plan, the public outreach and dialogue process will continue, and there will be additional physical and infrastructure planning. The team will evaluate the capacity for infrastructure improvements to attract development to the subarea. The consultant team will also evaluate implementation measures, which may include revisions to the Comprehensive Plan, zoning codes, transportation system plan, and other policy documents such as budgets.