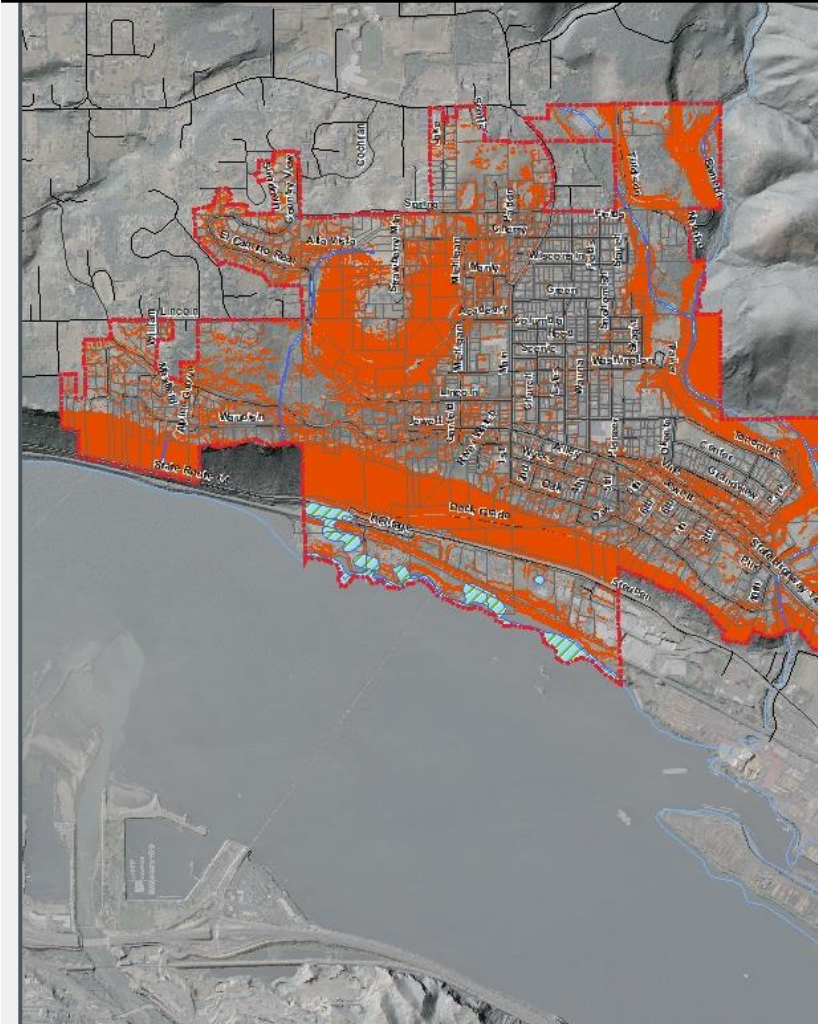




White Salmon

Urbanization Study



Acknowledgements

This work is made possible through input provided by the City of White Salmon, Klickitat County and Klickitat County Public Economic Development Authority (KCPEDA) along with community and business participants. While the views, findings and policy recommendations expressed in this report are those of the consultants, we specifically recognize and appreciate the time and attention dedicated to this work by the following individuals. (A complete list of study participants is included in Appendix B).

City of White Salmon

Marla Keethler, Mayor

Jan Brending, Clerk/Treasurer

Klickitat County

Richard Foster, KCPEDA Special Projects Manager

Dave McClure, KCPEDA Director

Jacob Anderson, KCPEDA

Gordie Kelsey, Public Works Director

Mo-Chi Lindblad, Klickitat County Planning Director

Local Participants

Betty Barnes, Mayor of Bingen

Larry Bellamy, Goldendale City Administrator

Greg Bringle, Republic Services

Sherry Carver, Goldendale Planning Commission Chair

Dale Connell, Riverview Community Bank

Jeremy Denny, Pacific Rim Brokers Inc.

Jerry Lewis, White Salmon Valley School District

Joel Madden, Mid-Columbia Housing Authority

Art Mains, Republic Services

Leslie Naramore, Washington Gorge Action Programs

Carrie Pipinich, Mid-Columbia Economic Development District

Jeff Renard, Columbia Gorge Regional Airport

Dean Schlenker, Goldendale School District

Maya Sullivan, Insitu

David Telford, Klickitat Valley Realty Inc.

Tammara Toppel, Mt. Adams Chamber of Commerce

Nancy White, Custom Interface Inc.

Consultants

FCS GROUP

Todd Chase, AICP, LEED ^{AP}, Principal/Project Manager

Timothy Wood, Project Consultant

Zech Hazel, Analyst

WSP USA, Inc.

Scott Keillor, AICP, Senior Project Manager/Planner

Nick Fazio, Planner/Public Involvement Specialist

Ethan Spoo, AICP, Senior Planner

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Section I. INTRODUCTION

White Salmon’s unique location creates both opportunities and challenges for future development. The City of White Salmon has the most residents of any urban area on the Washington side of the Columbia Gorge National Scenic Area (NSA). Yet, the Columbia and White Salmon rivers (to the south and west) and steep topography (to the north and east) create barriers and restrictions on future development. As growth continues, the City and County are working with local property owners, businesses and residents to ensure that community livability is retained as buildable lands are efficiently utilized.

The City of White Salmon and the Klickitat County Public Economic Development Authority Board (KCPEDA) selected FCS GROUP and WSP USA (planning and infrastructure consultants) to conduct a study of future land needs within White Salmon and the surrounding Urban Exempt Area. The study entails a countywide assessment of buildable lands, infrastructure, economic opportunities, housing needs and identifies potential strategies to address future urbanization needs. Work Completed

This work was completed during 2019 and 2020 and included input from county and city staff, stakeholders and community officials, developers, real estate brokers, business owners, school district representatives and housing advocacy groups.

Key work elements entailed the following.

Buildable Lands Inventory Tasks

- This includes a countywide Buildable Lands Inventories (BLI). The BLI findings and maps for the City of White Salmon and the White Salmon/Bingen Urban Exempt Area include information about the suitability of vacant land for future residential and employment development. The countywide findings are provided in a separate report.

Housing Needs Assessment Tasks

- A countywide housing needs assessment (HNA) with analysis of the socioeconomic characteristics and trends affecting housing demand.
- Existing housing stock inventory, including location of existing housing as well as the amount of housing that is owner occupied, and an inventory of rental housing.
- Review regional trends that affect housing needs in Klickitat County including the amount of housing used for short-term rentals and vacation homes.
- Market analysis that considers the cost of housing and related factors.
- A 20-year forecast of housing needs by type, density and land requirements.

Employment Land Needs Analysis Tasks

- Includes a countywide economic opportunities analysis and employment land needs assessment.
- Analysis of economic trends that affect employment land needs in Klickitat County including parcel size, building type and location.
- Forecast of employment need by industry type and development density.

White Salmon Urbanization Analysis Tasks

- Assessment of employment and housing land needs for the White Salmon/Bingen areas.
- Development of strategies to maximize opportunities on developable lands as well as annexation candidate sites.
- Includes draft policy considerations for making changes to housing policy and zoning codes to encourage residential development as identified by local stakeholders.

This study along with separate technical analyses of transportation and infrastructure will be used to inform the City of White Salmon and Klickitat County about ways to update long-range plans to ensure adequate levels of public services to address future growth.

I.A. COMMUNITY INPUT

To obtain input on the proposed plan, WSP USA, Inc. conducted stakeholder interviews and focus groups early in 2020. Interviews were conducted as informal conversations intended to understand individual and organizational perspectives, including up to four stakeholders per interview. Discussion topics generally covered the following:

- The adequacy of housing options in their community
- What specific types of housing are needed to meet current demand
- Assessments of economic opportunities known throughout the county
- Specific barriers to housing development in Klickitat County and the City of White Salmon
- Identification of potential “catalyst sites.” If developed, these sites are expected to generate significant housing or employment opportunities.
- Specific knowledge about utility and infrastructure needs to support housing for a site or community
- Identification of top priorities.

A complete summary of community input received from interview participants is provided in **Appendix B**.

Section II. BUILDABLE LAND INVENTORY

This buildable land inventory (BLI) includes an assessment of current land area that is most suitable for additional residential and employment development (e.g., commercial, industrial and housing) within the City of White Salmon and adjacent unincorporated urban exempt areas and provides the city with a catalog of developable lands (including potential catalyst sites) to address housing immediate and long-term housing and business development needs.

Using Geographic Information System (GIS) tools, FCS GROUP utilized available data provided by the Klickitat County Assessor and other sources to analyze existing property types, zoning designations, valuation, and environmental constraints. Klickitat County property assessment data were used as a basis for determining land vacancy status, which was refined with an analysis of potential environmental constraints (floodways, protected areas, open spaces, steep slopes) to remove lands that are generally unsuitable for additional development based on natural feature limitations.

Draft BLI maps were subsequently subjected to “ground truthing” through a combination of analysis via Google Earth maps, in-field surveys, and input obtained from local stakeholders.

The resulting BLI includes detailed information about tax lots (parcels) and their suitability for residential and employment development. This inventory provides a tabular and graphic representation of the key focus areas. The datasets and sources of information used are listed below in **Exhibit 2.1**.

Exhibit 2.1: White Salmon BLI Data Sources

Dataset	Description	Source
Boundary	Boundary of Klickitat County	Klickitat County
Urban Areas	Boundary of Urban Areas in National Scenic Area used for Focus Area delineation	NSA Data Library ¹
Cities	Cities of Goldendale, Bingen, and White Salmon city limits	Klickitat County
Parcels	Parcels/Tax lots with owner, use code and assessed value	Klickitat County
Pipeline	Layer representing locations of pipelines	Klickitat County
Railroad	Railroad centerline	Klickitat County
Roads	County and City roads. State highways.	Klickitat County
Stlkpoly	Water courses, streams, and rivers	Klickitat County
Waterbodies	Water bodies and features	Klickitat County
Zone1023	Zoning designations for unincorporated areas in Klickitat County	Klickitat County
Goldendale Zoning	Zoning designations for the City of Goldendale	City of Goldendale
White Salmon Zoning	Zoning designations for the City of White Salmon	City of White Salmon
Bingen Zoning	Zoning designations for the City of Bingen	City of Bingen
NWI Wetlands - USFWS	Local or National Wetlands Inventory - March 2013	USFWS
Steep Slopes	Slopes 25% or greater derived from LiDAR Digital Terrain Model (DTM)	WADNR ²
Aerial Imagery	National Agriculture Imagery Program (NAIP) aerial imagery - July 2017	USDA ³

¹ - [Columbia River Gorge National Scenic Area \(NSA\) Data Library](#)

² - [WADNR - Washington Department of Natural Resources LiDAR Portal](#)

³ - [USDA - National Agriculture Imagery Program \(NAIP\)](#)

II.A. BUILDABLE LAND INVENTORY METHODOLOGY

The objective of the BLI is to determine the amount of developable land available for future development in the City of White Salmon and adjacent urban areas. The steps taken to perform this analysis are as follows:

1. **Calculate gross acres** by zoning designation, including classifications for fully vacant and partially vacant parcels. This step entails “clipping” all the parcels that are contained in the White Salmon Urban Exempt Area (for parcels bisected by the UEA or City limites, the BLI allocates portions of that parcel to each defined area) and excludes parcels outside the urban exempt area for consideration of development at this time.
2. **Identify development constraints and calculate gross buildable acres** by zoning designation by subtracting land that is constrained from future development, such as existing public right-of-way, parks and open space, steep slopes, and waterways. While the buildable land maps depict areas with slopes of 25% or less; in White Salmon where there is bedrock below the surface, slopes of up to 40% are often buildable with engineering methods; and slopes between 15-40% may be unbuildable if mapped as landslides. Hence, the 25% slope layer is intended to reflect generalized location for land that is constrained due to topography.
3. **Identify and tabulate vacant, partially-vacant and redevelopment land area.** *Vacant* tax lots (parcels) are assumed to be tax lots with less than \$10,000 in existing assessed improvement value (i.e., building value) according to the Klickitat County Assessor. *Partially-vacant* tax lots (those which can be subdivided) were also determined by identifying parcels with improvements greater than \$10,000 that possess enough land to accommodate additional development in the future. *Redevelopable* tax lots include parcels with land value greater than its improvement value. Vacant and partially-vacant parcels with less than 0.5 acres (1/2 acre) are classified separately.
4. **Determine buildable acres by zoning designation.** This step requires utilizing the net buildable acres from step three and grouping the results into general zoning designations (e.g., low density residential, medium-density residential, high-density residential, industrial, commercial, etc.).

The steps used to create the buildable land inventory are summarized below. Please refer to the **Klickitat County Buildable Land Inventory Report** for a more detailed discussion of the methods used in this analysis.

Based on zoning information provided by Klickitat County, as well as input received from the City of White Salmon, FCS GROUP grouped the land base in White Salmon and the urban exempt area into development categories, which are detailed in **Exhibit 2.2**.

Residential Lands

Among residential-zoned properties, the BLI has been organized into four development categories based on allowable density per the underlying zoning of each parcel (*housing must be permitted outright or allowed by conditional development approval*).

The residential land base is organized as follows:

- **Very Low density (i.e., rural large-lot detached housing)**: Land organized in the very low category generally allows development at less than one dwelling unit per acre. Specifically, these land uses allow between 0.05 and .5 dwelling units per acre.
- **Low density (i.e., large lot single-family detached housing)**: Land classified as low density allows between one and 1.5 dwellings per acre.
- **Medium density (i.e., single-family detached and attached housing)**: Medium density land allows between 2 and 10 dwelling units per acre.
- **High density (i.e., multi-family housing with 5+ units per structure)**: High density properties in this analysis allow between 11 and 34 dwelling units per acre.

The Employment Land Base is divided between industrial and commercial development uses. The commercial category is zoned to accommodate retail and service employment while the industrial category is zoned for either light or heavy industrial uses.

Draft BLI findings and results were reviewed by County and City staff and refined accordingly based on the input received.

Exhibit 2.2: General Land Use Development Categories

Land Type	Very Low-Density Residential	Low-Density Residential	Medium-Density Residential	High-Density Residential	Industrial Employment	Commercial Employment
R-1 Single-Family Residential		✓				
R-2 Two-Family Residential			✓			
R-3 Multi-Family Residential				✓		
RL Single-Family Large Lot Residential	✓					
C Commercial						✓
RPD Riverfront District						✓
SR Suburban Residential	✓					
Industrial Park					✓	
General Commercial						✓

II.B. CITY OF WHITE SALMON BUILDABLE LANDS

The analysis of buildable lands considers both residential and employment categories.

Exhibit 2.3 displays current zoning within the City of White Salmon.

Exhibit 2.4 displays environmental constraints such as steep slopes and waterways.

Using the methodology discussed in step three of the BLI Methodology, the net vacant and partially-vacant lands within the City are summarized below and detailed in **Appendix A**.

Residential Land

Vacant and partially-vacant residential land in White Salmon includes a mix of net buildable acreage among all four housing density categories (**Exhibit 2.3**). The current BLI within the City of White Salmon includes approximately 97 acres of low and very-low density residential land (RL and R1 zones), 15.8 acres of medium-density land (R-2), and 4.5 acres of high-density land (R3). Remaining high-density properties are relatively small, averaging just over 1 acre each, requiring creative development for more dense housing.

Based on average housing density assumptions ranging from 2 dwellings per acre in RL to 14 dwellings per acre in R-3, within the White Salmon city limits the expected housing capacity includes approximately 479 net new dwellings at full utilization of vacant and part-vacant tax lots.

Exhibit 2.3: Vacant Residential Land and Potential Housing Capacity, City of White Salmon

City of White Salmon Buildable Land (acres) and Dwelling Capacity (units)*					
	RL	R-1	R-2	R-3	Total
Vacant	37.1	44.3	15.2	3.9	100.5
Part-Vacant	0.0	5.2	0.0	0.0	5.2
Redevelopable	1.0	9.6	0.6	0.6	11.8
Total Acres	38.1	59.1	15.8	4.5	117.5
	RL	R-1	R-2	R-3	Total
Avg. Density (units/acre)	2.0	4.0	10.0	14.0	
Dwelling unit capacity					
on vacant land	74	177	152	54	458
on part-vacant land	0	21	0	0	21
Total Dwellings	74	198	152	54	479

* Depicts estimated housing capacity within City limits, assuming 100% utilization of vacant and part-vacant lands.

Employment Land

Vacant employment land in White Salmon is limited to a few commercial parcels within the Riverfront Plan District (RPD) totaling approximately 5 acres and no industrial land (**Exhibit 2.4**). While no significant vacant commercial land exists outside the RPD area, there may be a few redevelopment opportunities (as summarized below).

Exhibit 2.4: Vacant Employment Land in City of White Salmon

RPD Riverfront District, City of White Salmon

		0.5-1 Acres	1-5 Acres	5+ Acres
Vacant	Count	4	2	0
	Acres	3.0	2.1	0.0

Redevelopment Opportunities

In addition to vacant and partially-vacant parcels tabulated above, FCS GROUP also identified redevelopable properties in accordance with step three of the BLI Methodology. Potential redevelopment opportunities in White Salmon have been identified (but not mapped) and include: 23 residential properties across all four housing categories totaling 15.1 acres (0.65 acres per tax lot on average). In addition, there is approximately 12-14 acres of commercial and PRD zoned land that could be redeveloped over time.

Further details can be found in **Appendix A**.

Exhibit 2.5: White Salmon Zoning Map

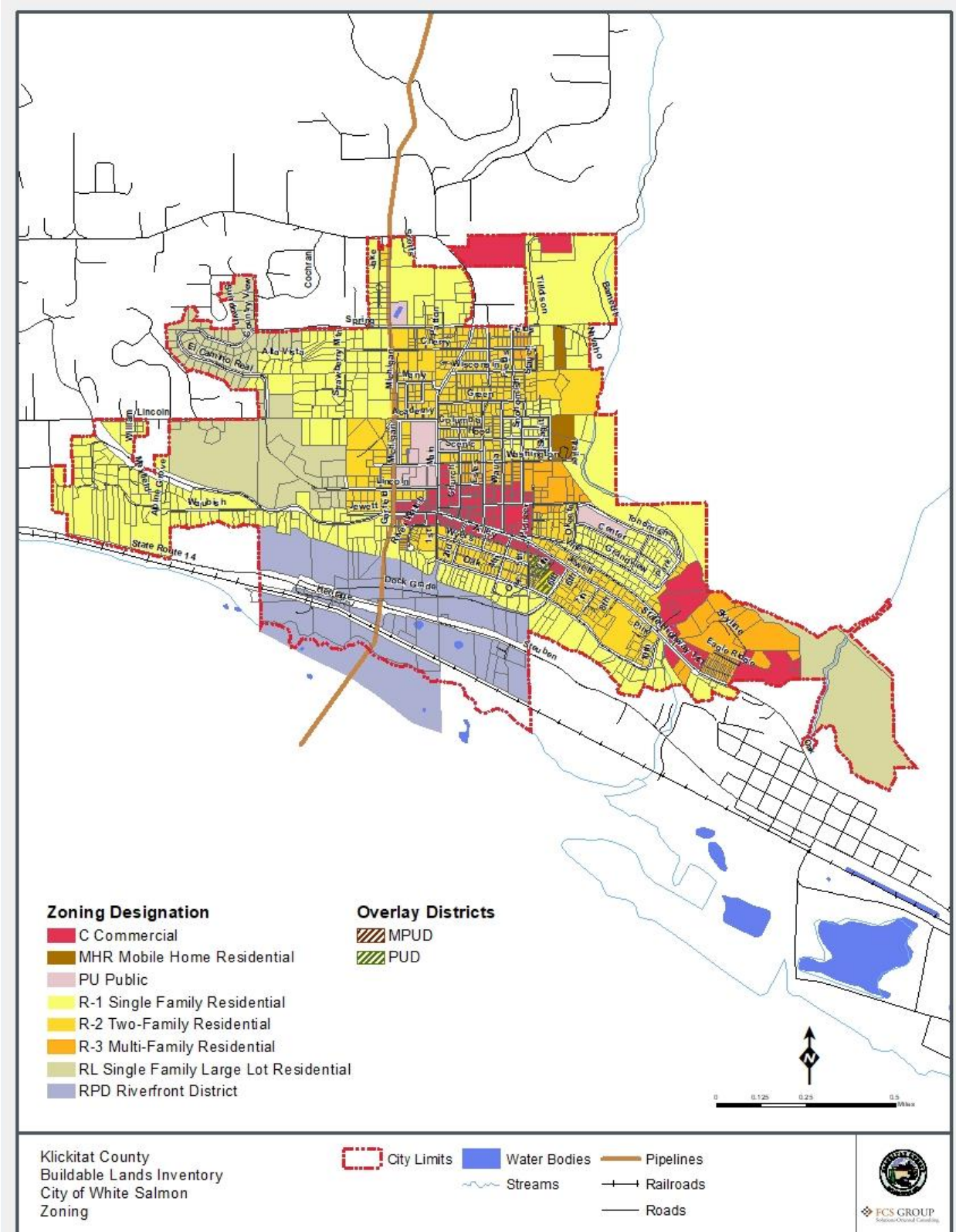


Exhibit 2.6: White Salmon Environmental Constraints

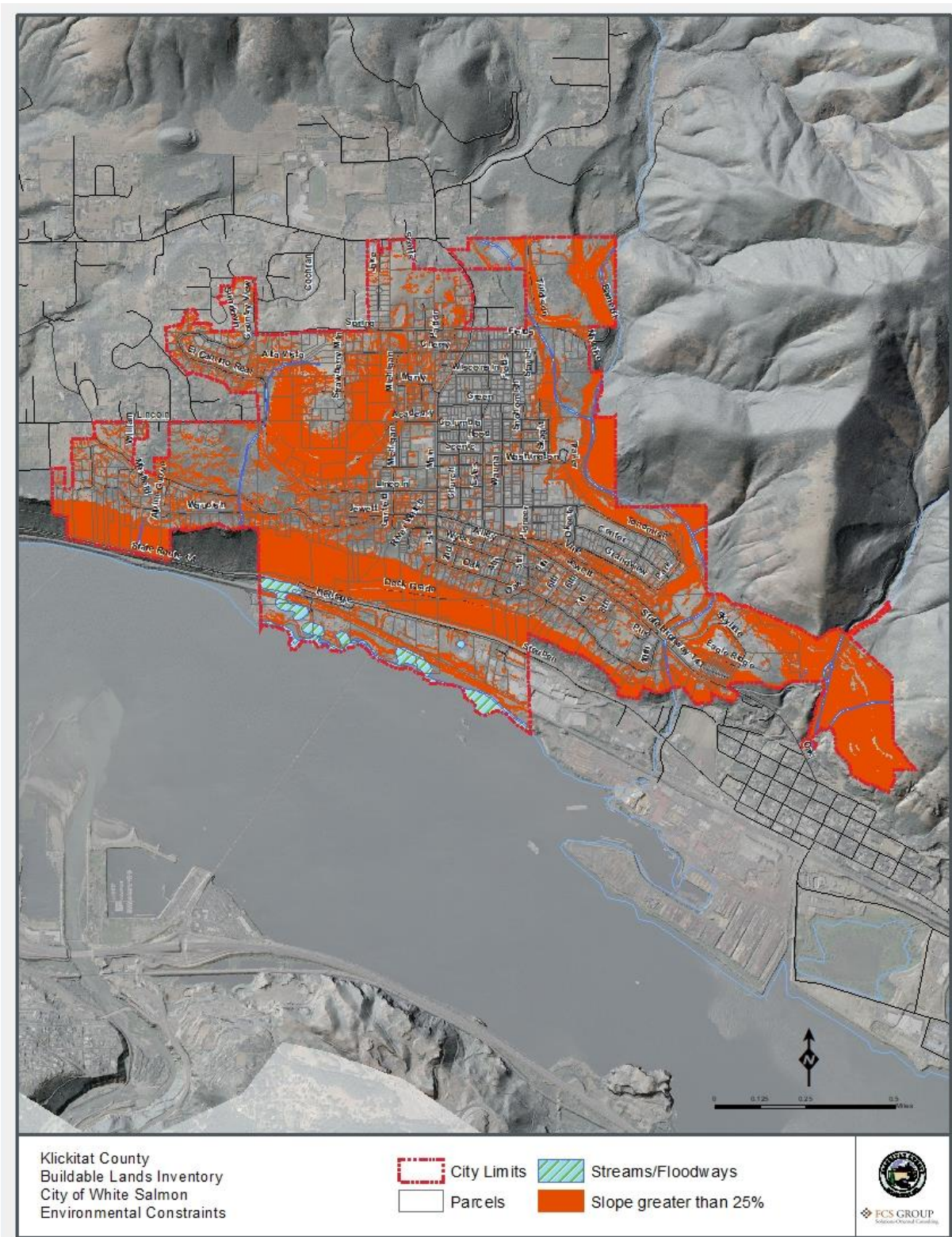


Exhibit 2.7: White Salmon Buildable Residential Land Map

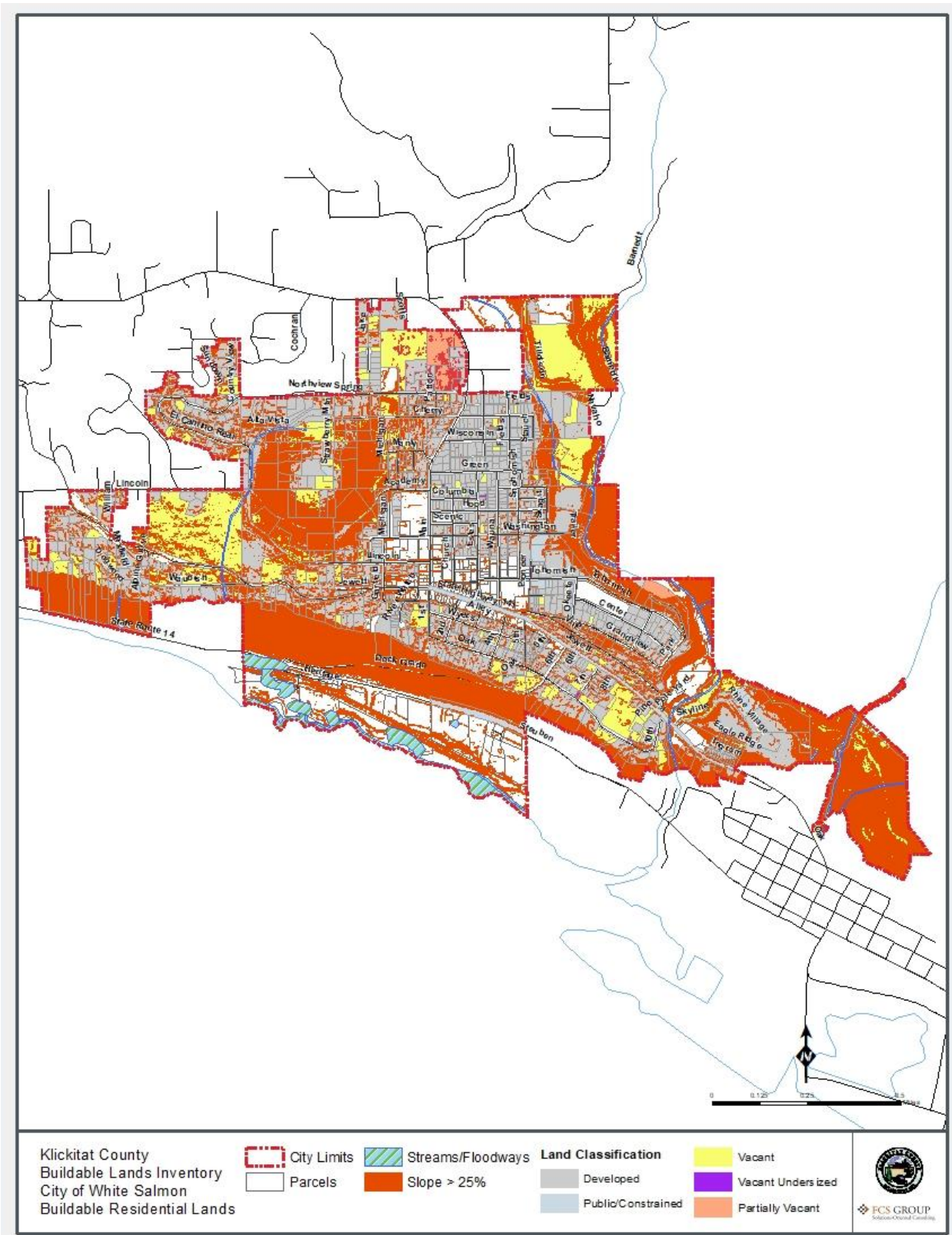
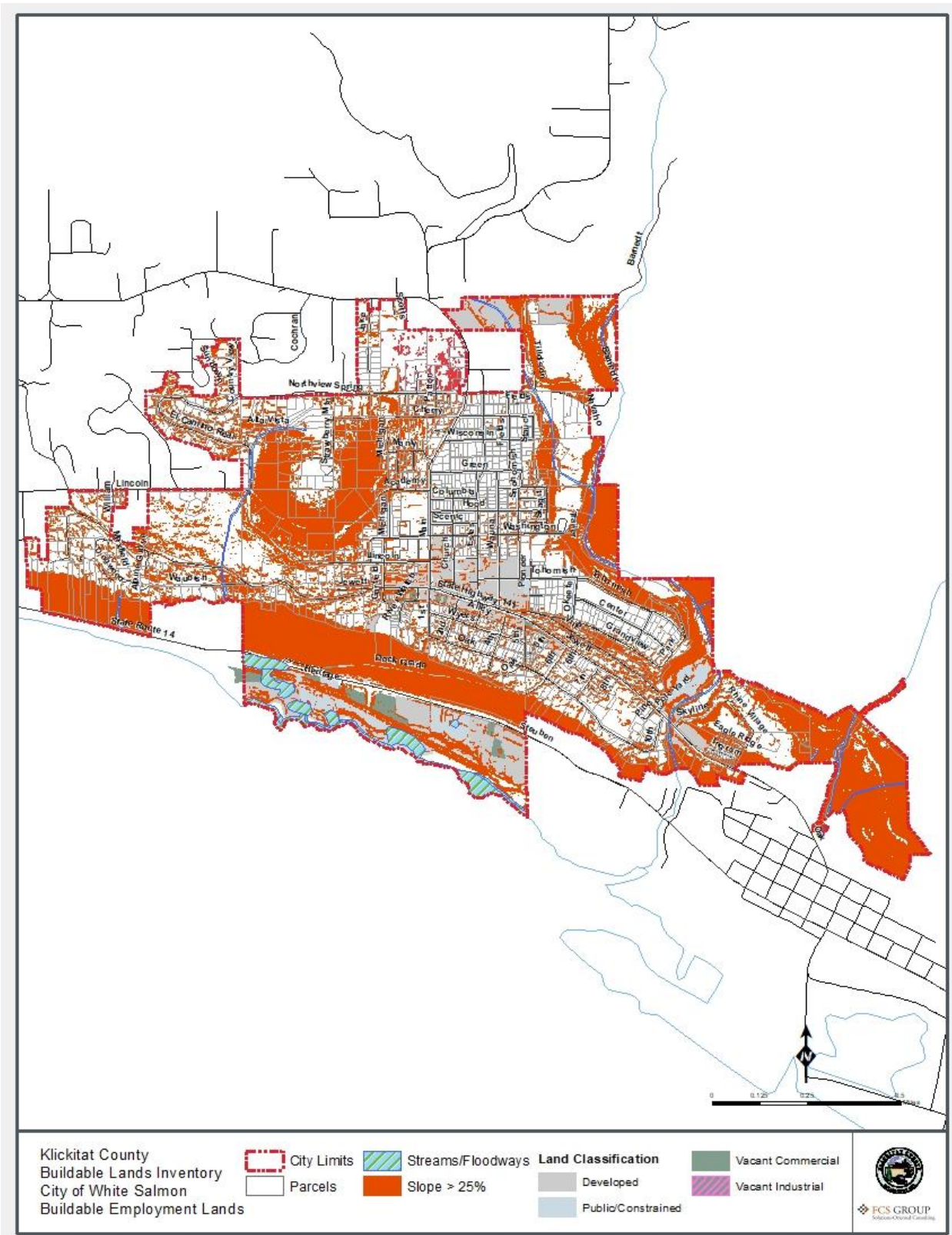


Exhibit 2.8: White Salmon Buildable Employment Land Map



II.C. URBAN EXEMPT AREA BUILDABLE LANDS

As part of the White Salmon Urbanization Study, the BLI analysis also considered the amount of buildable land located within the White Salmon/Bingen Urban Exempt Area (includes land outside city limits discussed previously and land that is exempt from National Scenic Area restrictions). This included consideration of both residential and employment categories.

Exhibit 2.9 provides a current zoning map.

Exhibit 2.10 displays environmental constraints.

Residential Lands

Vacant residential land in the White Salmon/Bingen Urban Exempt Area is limited to properties with current land use classifications for very low-density residential (**Exhibit 2.9**). This includes land zoned “Suburban Residential” and “Rural Residential 1” with a total of 334.8 vacant acres. While there are a few properties zoned for medium density, all of those properties are classified as developed and/or constrained by environmental features.

Exhibit 2.9: Vacant Residential Land, Urban Exempt Area

Land Type	Gross Land Base	Less Constraints	Less Developed	Net Buildable Acres
Very Low Density Residential	877.7	213.6	296.3	334.8
Low Density Residential	0.0	0.0	0.0	0.0
Medium Density Residential	3.4	0.2	3.2	0.0
High Density Residential	0.0	0.0	0.0	0.0

Employment Lands

The White Salmon/Bingen Urban Exempt Area includes parcels zoned for commercial and industrial development (**Exhibit 2.10**). Developable parcels include two vacant General Commercial parcels totaling 8.1 acres and two part-vacant parcels zoned Industrial Park totaling 75.7 acres. Within these partially-vacant employment lands, the Port of Klickitat County is actively marketing 23 separate tax lots at the Bingen Point Business Park with a combined total of +/-46 acres. These development sites range in size from 1.08 to 3.36 buildable acres.

Exhibit 2.10: Vacant Employment Land, Urban Exempt Area

Land Type	Gross Land Base	Less Constraints	Less Developed	Net Buildable Acres
Industrial Employment	252.2	115.1	61.4	75.7
Commercial Employment	33.5	3.9	21.5	8.1

Redevelopment Opportunities

Redevelopment opportunities in the White Salmon/Bingen Urban Exempt Area include two Industrial Park parcels totaling 60.4 acres, two General Commercial parcels totaling 1.2 acres; and 43 low-density residential parcels totaling 33.9 acres (average of 0.78 acres per parcel).

Exhibits 2.11 & 2.12 map developable lands in the residential and employment categories. Additional details are provided in **Appendix A**.

Exhibit 2.11: White Salmon/Bingen Urban Exempt Area General Zoning Map (outside city limits)

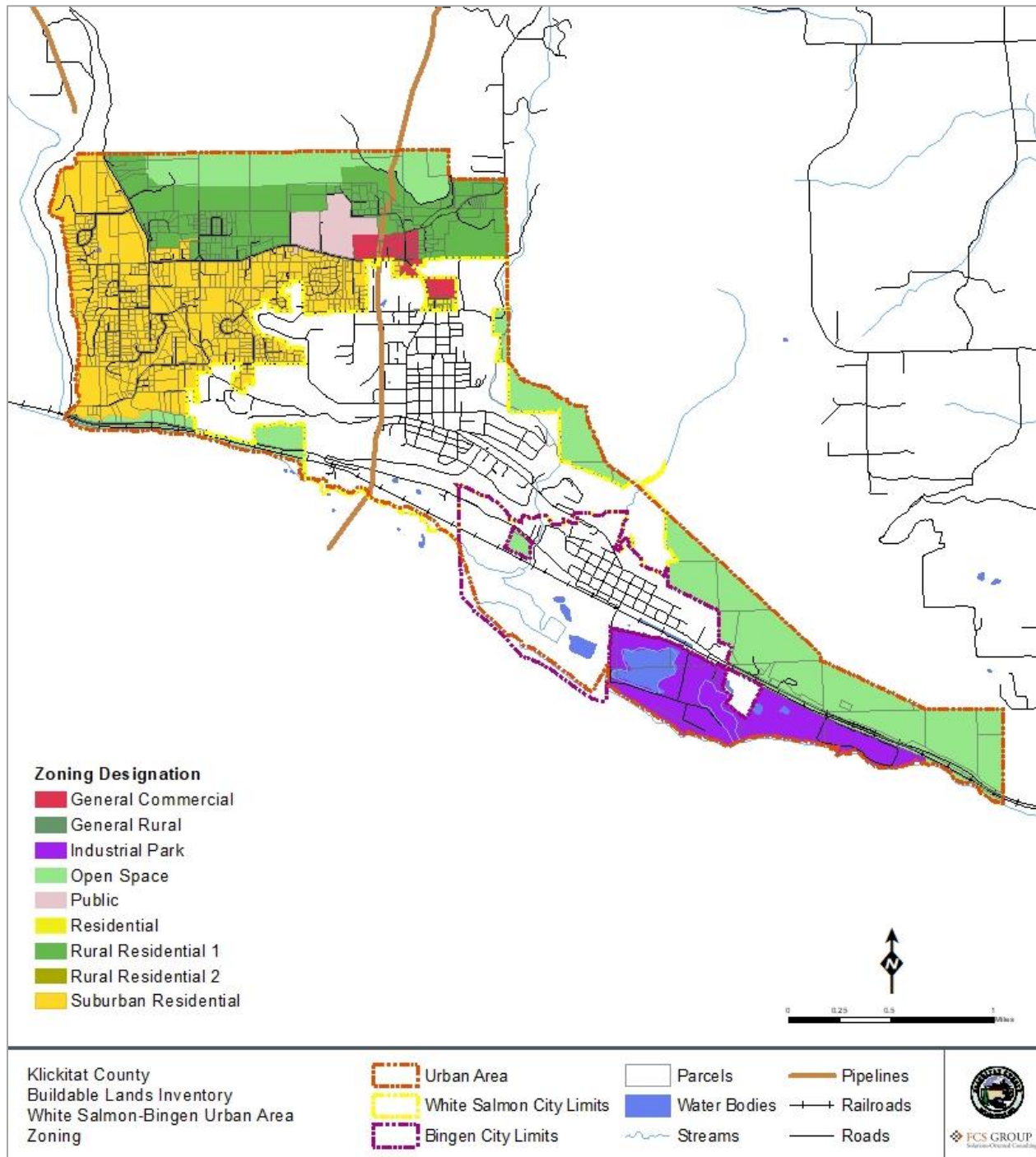


Exhibit 2.12: Environmental Constraints, White Salmon/Bingen Urban Exempt Area (outside city limits)

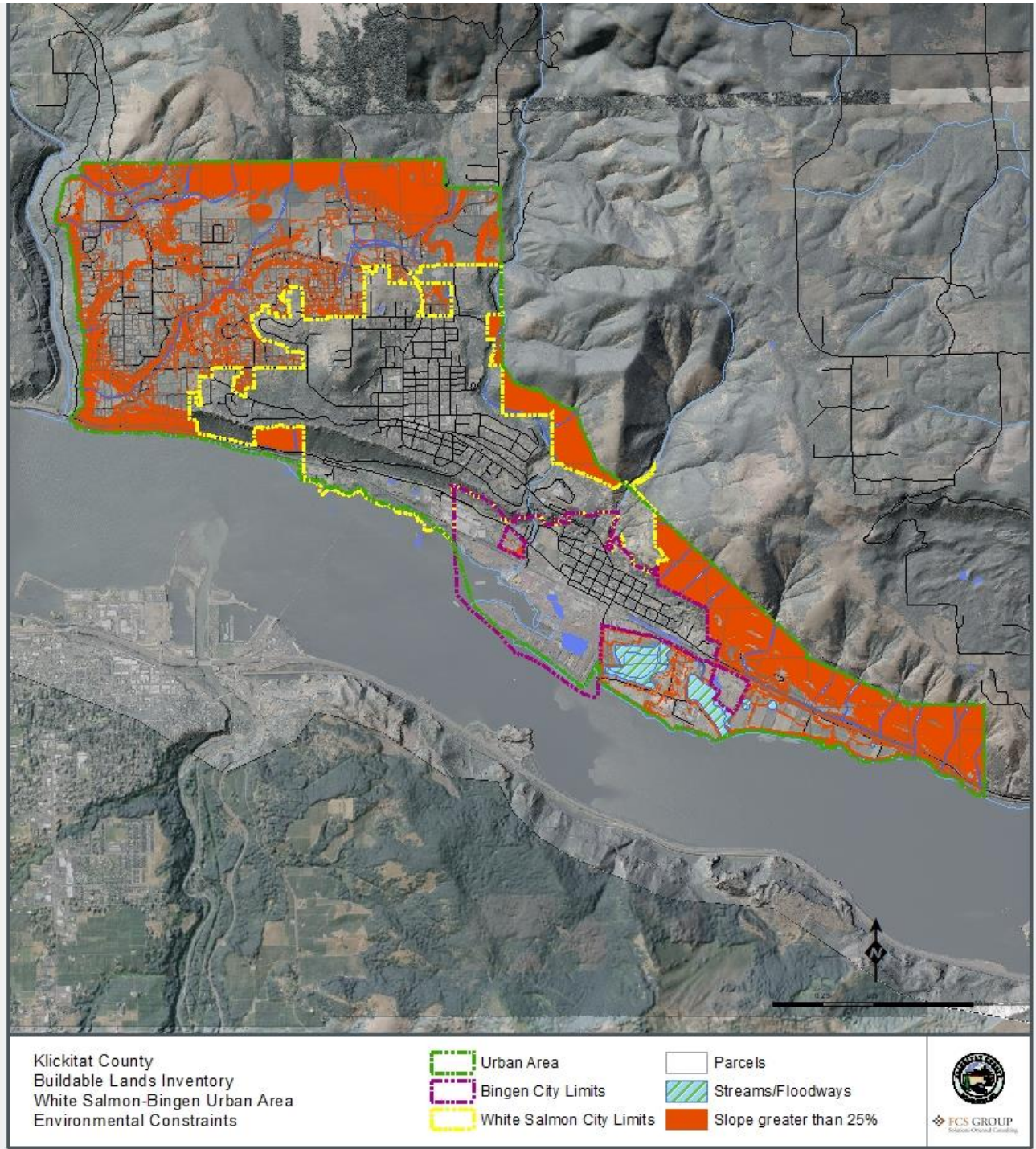


Exhibit 2.13: White Salmon/Bingen Urban Exempt Area Buildable Residential Lands (outside city limits)

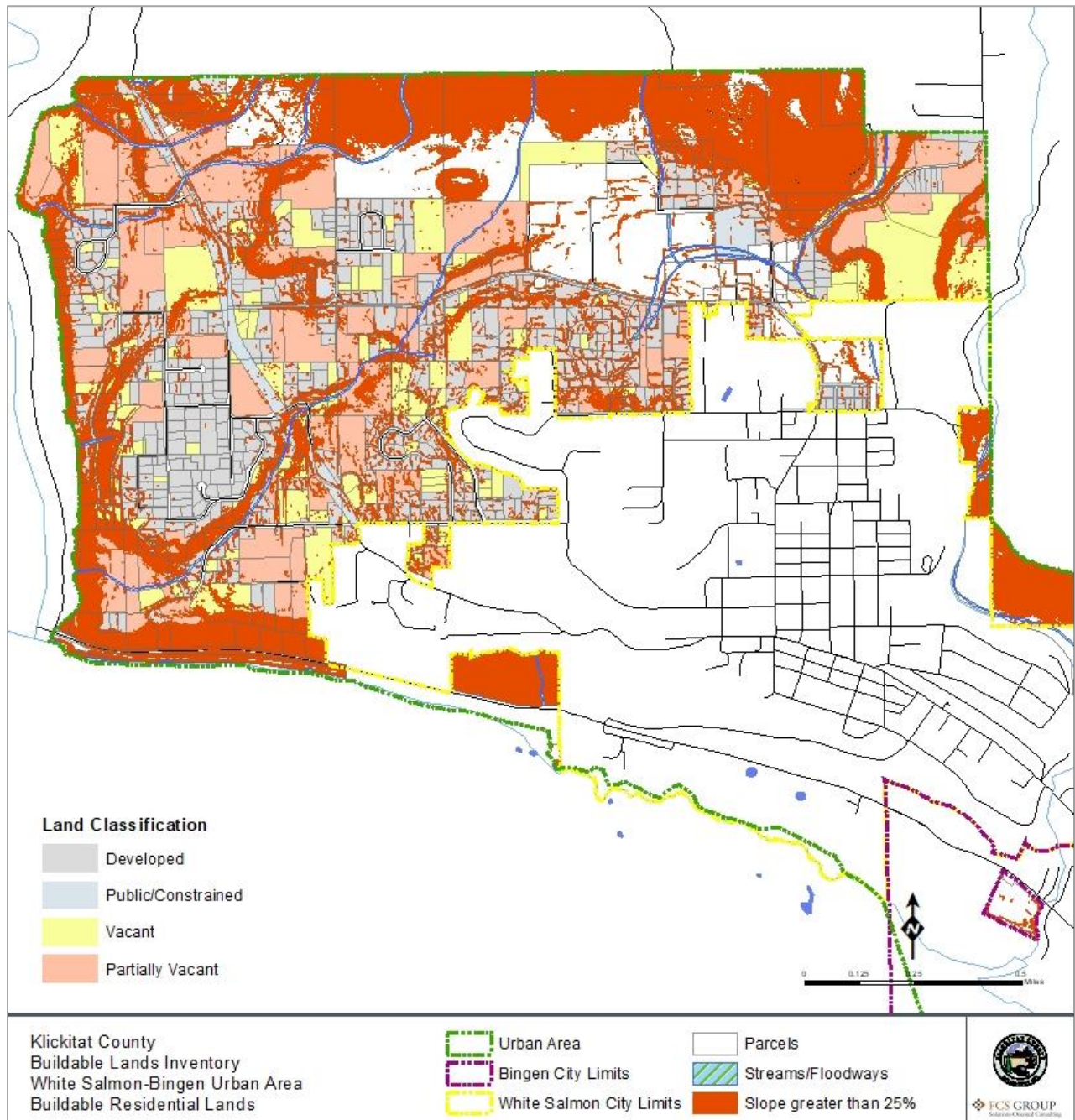
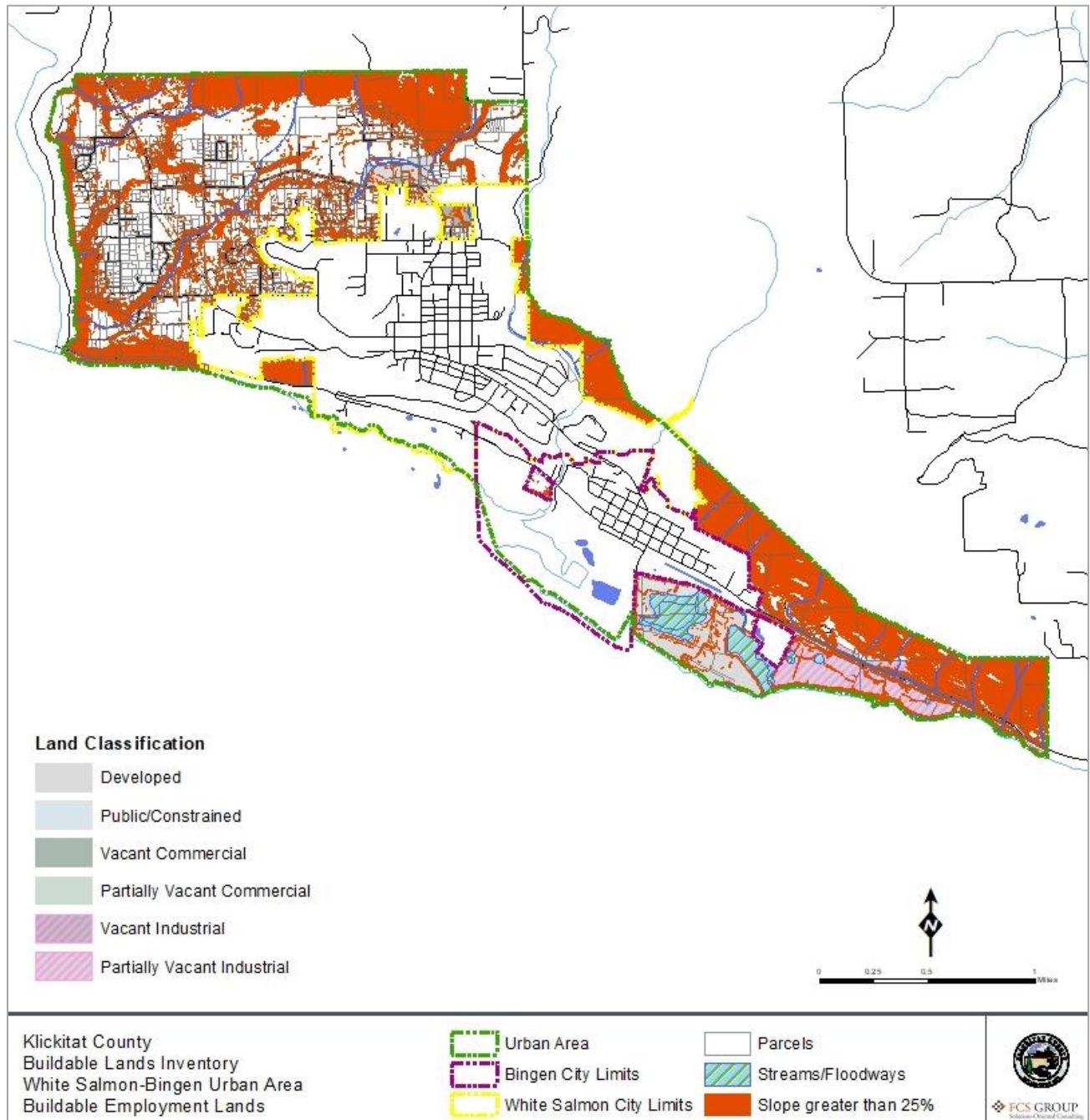


Exhibit 2.14: White Salmon/Bingen Urban Exempt Area Buildable Employment Lands (outside city limits)



Section III. ECONOMIC OVERVIEW

This section includes an analysis of economic trends and local competitive advantages. The analysis is intended to provide information for the long-term forecast for employment land needs.

FCS GROUP conducted an economic overview and market analysis of office, commercial, industrial, and public government development for Klickitat County. This analysis focused on the expected level of demand for new development related to job growth over the next 20 years.

III.A. MARKET OVERVIEW

A global health pandemic caused by the Coronavirus (COVID-19) disease began during the first quarter of 2020. The pandemic combined with falling oil prices and weakening international trade, is now causing a profound economic disruption on the U.S. and world economies. After nearly 11 years of economic expansion, the U.S. entered an economic recession in April 2020.

Most notably travel, tourism, and entertainment activities, which account for about 7% of the national GDP, have all but ceased. Other sectors, such as restaurants and industries which are heavily dependent on global supply chains are expected to suffer as well.

According to a Federal Reserve Bank report released in early April 2020, U.S. unemployment is expected to increase measurably and economic growth (as measured by GDP: value of goods and services produced) is expected to decline in 2020 compared with the prior year. Given the uncertainty surrounding the pandemic, near-term growth is expected to range between 1.6% to 1.9% annually over the next three years (2020-2022). However, until a COVID-19 vaccine is created and distributed on a wide scale any near-term growth forecast is suspect.

Before COVID, Washington had the 3rd fastest growing economy in the U.S. in terms of GDP growth. While much of the state's growth is accounted for in the Puget Sound Region, Klickitat County generally benefited from visitation within the Columbia River Gorge National Scenic Area, a stable viticulture sector, and growing high-tech and waste management sectors.

It is not yet clear how the pandemic will affect long-term growth for White Salmon. It is possible that urban residents may be more inclined to move to small rural areas with more open space and less overall population density. However, the economic impact of the pandemic will likely curtail employment and wages for many years, which would limit new development in the near-term. This urbanization study assumes that the long-term (20-year) housing, employment and land need forecasts by the Washington Office of Financial Management that are referenced in this report would require a slightly longer time frame (i.e., 25-30 years) to achieve.

Population

Population continues to expand within White Salmon, Klickitat County and Washington as a whole. Over the last 19 years, White Salmon's population increased 19%, from about 2,193 permanent (year round) residents in 2000 to 2,610 in 2019 (preliminary estimate by OFM). While the local growth in population is below the state average, the recent decade (2010 to 2019) has evidenced much faster population growth than the prior decade (**Exhibit 3.1**).

Long-term population forecasts by Washington Office of Financial Management (OFM) depict a wide range in projected population growth for the county. **Exhibit 3.2** reflects the actual change in local population under the medium and high growth forecast. During the 2020 to 2040 timeframe,

OFM’s low growth forecast assumes negative population change for Klickitat County; the medium OFM forecast (0.05% AGR) assumes population growth of only 240 people; and the high growth forecast (0.96% AGR) assumes that 4,719 people will be added to Klickitat County.

Given the fact that the high growth scenario is most consistent with the trends established over the past decade, this analysis relies upon the high-growth forecast to determine housing and land needs requirements.

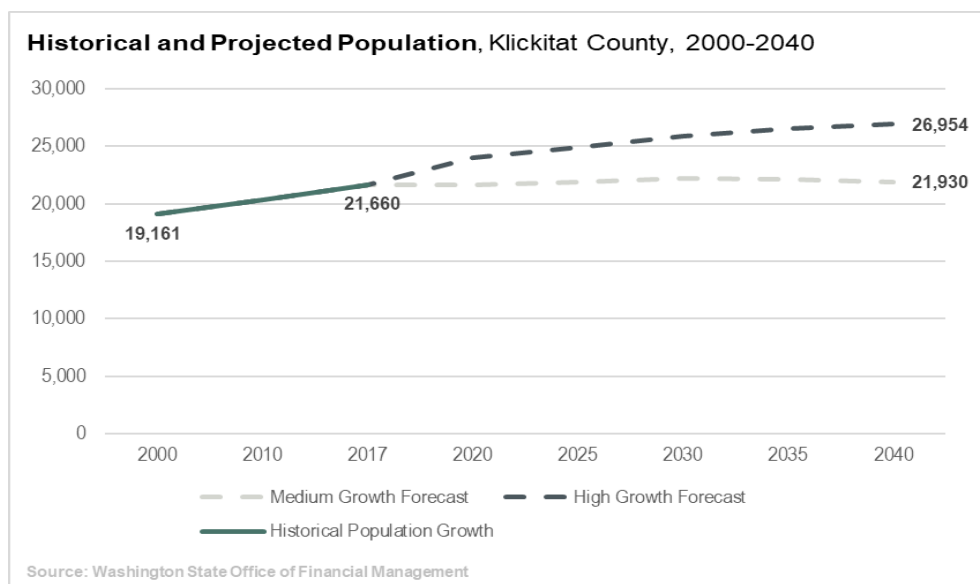


Exhibit 3.1: Population Trends

Population	2000	2010	2018	2019	2000 to 2019	2000-2019 AGR	2010-2019 AGR
Klickitat County	19,161	20,318	21,980	22,430	3,269	0.8%	1.1%
Alderdale	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Bingen	672	720	735	750	78	0.6%	0.5%
Dallesport	1,185	1,202	1,313	1,331	146	0.6%	1.1%
Goldendale	3,760	3,407	3,530	3,545	(215)	-0.3%	0.4%
Husum	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Lyle	530	499	535	536	6	0.1%	0.8%
Roosevelt	79	156	178	178	99	4.4%	1.5%
Trout Lake	494	557	605	621	127	1.2%	1.2%
White Salmon	2,193	2,224	2,505	2,610	417	0.9%	1.8%
Wishram	324	342	345	345	21	0.3%	0.1%
Washington State	5,894,141	6,724,540	7,427,570	7,546,410	1,652,269	1.3%	1.3%

Source: Washington State Office of Financial Management, Small Areas Estimate Program (Sep. 2019) and Estimates of April 1 Population. AGR = average annual growth rate.

Exhibit 3.2: Population Projections, 2000-2040



Within the City of White Salmon, the number of households increased from approximately 763 in 1990 to 889 in 2018 (latest available estimate). During this time, the average household size declined from 2.43 to 2.2 people per household. It is also apparent that the number of dwellings added (580) during this timeframe increased faster than the number of year-round households (344), which reflects a growing second-home market (**Exhibit 3.3**). *Please note, Exhibit 3.3 reflects U.S. Census estimates which in the past have had a large standard of error for small urban areas like White Salmon; OFM does not prepare estimates for households nor dwelling units.*

Exhibit 3.3: White Salmon Population, Households and Dwelling Units

	1990	2000	2010	2018	Change: 1990-2018
Households (HH)	763	887	889	1,107	344
Avg. HH Size	2.43	2.46	2.23	2.2	(0.2)
Dwelling units	816	949	1,087	1,396	580

Source: U.S. Census, and American Community Survey 2013-2018 estimates.

Income

According to the latest U.S. Census estimate, the 2017 household income level in Klickitat County was \$54,056 and the median family income level was \$63,357. The median income in Klickitat County increased 2.3% (between 1999 and 2017). Overall, Klickitat County still has a higher share of low-income households than the state average but the growth rate for income between 1999 and 2017 exceeded the state average (**Exhibit 3.4**).

White Salmon’s household income levels remain at the lower-end of the range of communities shown in the following table and income growth is not keeping pace with the county nor state. This dynamic can lead to increasing housing cost burdens among local residents, which is further discussed below.

It should be noted that the income data shown in Exhibit 3.4 has been shown by the City of White Salmon to skew income estimates higher than what it is within city limits, given Census estimates are taken at the zip code level and tend to include large “estate homes” outside city boundaries.

Exhibit 3.4: Median Household Income, 1999-201

	1999	2017	AGR
Washington	\$45,610	\$66,174	2.09%
Klickitat County	\$34,457	\$51,258	2.23%
Bingen	\$25,156	\$52,833	4.21%
Dallesport	\$34,167	\$51,852	2.34%
Goldendale	\$26,404	\$40,354	2.38%
Lyle	\$32,969	\$51,063	2.46%
Trout Lake	\$35,000	\$61,250	3.16%
White Salmon	\$34,750	\$47,418	1.74%
Wishram	\$24,625	\$30,714	1.24%

Source: U.S. Census, 2000 and 2013-2017 estimates.

AGR = annual average growth rate.

Employment and Unemployment

Employment has been on a relatively steady upwards trajectory in Klickitat County until 2020. And unemployment rates hit a historic low during 2019. Statewide unemployment rates increased to 5.3%

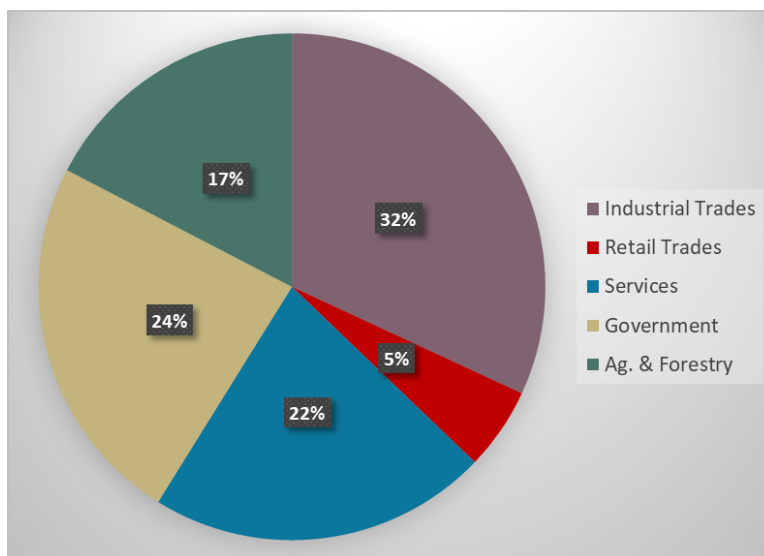
in March 2020 up from 4.5% one year prior. The COVID pandemic will push unemployment higher in 2020 as service industries take time to recover and may not hire back all former employees until 2021 or later.

Klickitat County unemployment declined during most of 2019 to 4.9% in September; before ending the year slightly higher at 5.4%. According to the Washington Employment Security Department (ESD), much of 2019 fluctuation in jobs was attributed to layoffs at Insitu, a designer and fabricator of unmanned drones (located in Bingen) and impacts on its suppliers March unemployment estimates place the county's unemployment rate at 5.7% in March 2020, up from 4.2% year-over-year.

Because the unemployment rate is a measure of the percentage of workers age 20+ that are actively looking for a job, it does not reflect factors regarding labor participation rates and under-employment (workers that have accepted low paying jobs since other jobs are not available locally). Overall, labor force participation rates within Klickitat County during 2014-2018 were at 70.7% of the working age population age 25 to 54, which is below the national average (77.7%). Much of this difference is attributed to the aging population within the county.

In 2019, the total employment within Klickitat County remained near the all-time high at 7,452 workers (farm and nonfarm workers). The largest job sectors include industrial trades (construction, manufacturing, high tech, utilities and warehousing) with 32% of the base. Government and service sectors are next with 24% and 22% of the job base. Agriculture, forestry and fishing related jobs account for 17% of the overall job base, followed by the retail sector (**Exhibit 3.5**).

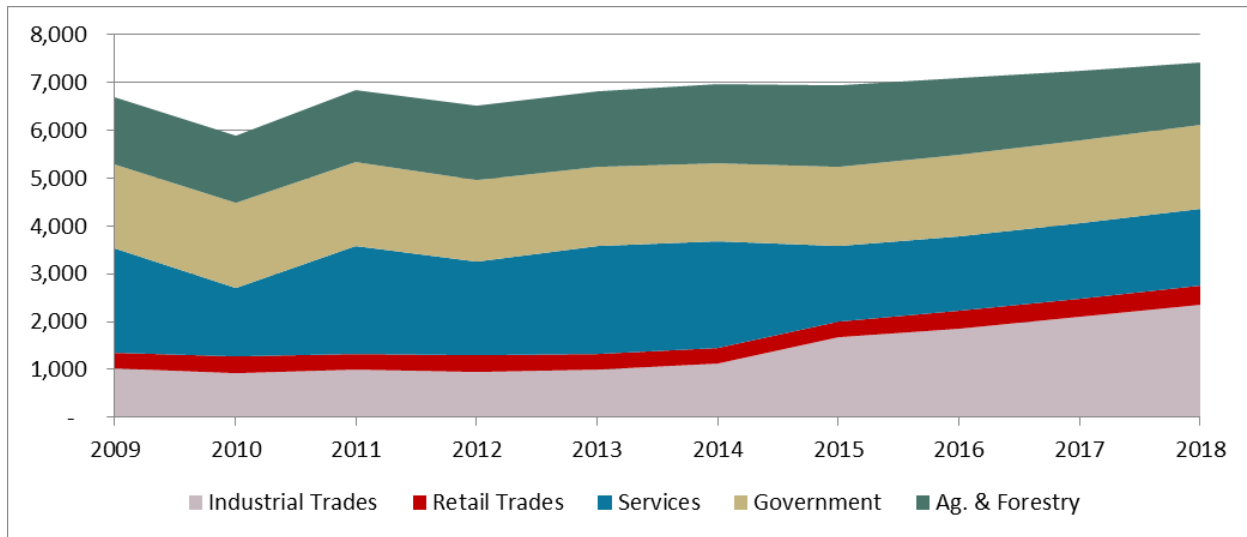
Exhibit 3.5: Employment by Sector in Klickitat County, 2018



Source: Washington Office of Employment Security.

Total employment within Klickitat County has been increasing steadily over the past decade (**Exhibit 3.6**). Between 2010 and 2018, the industrial sector added 1,339 jobs while the services sector lost 556 jobs. Other sectors experienced more modest changes, including retail which gained 54 jobs, agriculture which lost 96 jobs, and government which declined by only 8 jobs.

Exhibit 3.6: Employment Trends by Sector in Klickitat County, 2009-2018



Source: Washington Employment Security Department.

Accurate employee counts are difficult to obtain for small urban and rural locations. Available survey data obtained from the U.S. Census, OntheMap database for employment by place of work indicates that total employment within the City of White Salmon increased from 612 jobs to 1,064 jobs between 2010 and 2017. A similar increase in employment also occurred in the City of Bingen (Exhibit 3.7).

Major local employers in White Salmon and Bingen include local schools, city employees, Skyline Hospital, Insitu, maker of unmanned aeronautical vehicles (UAVs) and their suppliers (e.g., Innovative Composites Engineering).

Exhibit 3.7

White Salmon Employment Trends

	2010	2017	change
Agriculture & Forestry	-	14	14
Industrial	104	296	192
Retail	62	78	16
Services	402	340	(62)
Government/other	44	336	292
Total	612	1,064	452

Bingen Employment Trends

	2010	2017	change
Agriculture & Forestry	-	62	62
Industrial	77	254	177
Retail	7	22	15
Services	40	257	217
Government/other	1	-	(1)
Total	125	595	470

U.S. Census OntheMap database.

Recreation and Tourism

Visitor spending continues to be a bright spot within Klickitat County. County residents and visitors enjoy access to abundant recreational activities afforded by the Columbia River, White Salmon River, Mt. Adams Wilderness, Cowboy Lake National Wildlife Refuge, Goldendale Observatory, Maryhill Museum and several wineries, breweries and local attractions.

Exhibit 3.8 depicts trends in visitor spending within Klickitat County between 2012 and 2018. Visitor spending reached a record level in 2018 at \$52 million, up 4.7% from the prior year.

Exhibit 3.9 illustrates the potential demand for additional lodging facilities within Klickitat County based on forecasted growth in tourism, business and group demand. Based on growth in visitation, and group (i.e., meetings, weddings, etc.) demand, nearly 400 additional lodging rooms could be supported over the next 20 to 30 years.

New or expanded lodging facilities within White Salmon, along with an increase in short-term rentals is very likely over the next decade.

Exhibit 3.8: Klickitat County Visitor Spending in Millions (2012-2018)

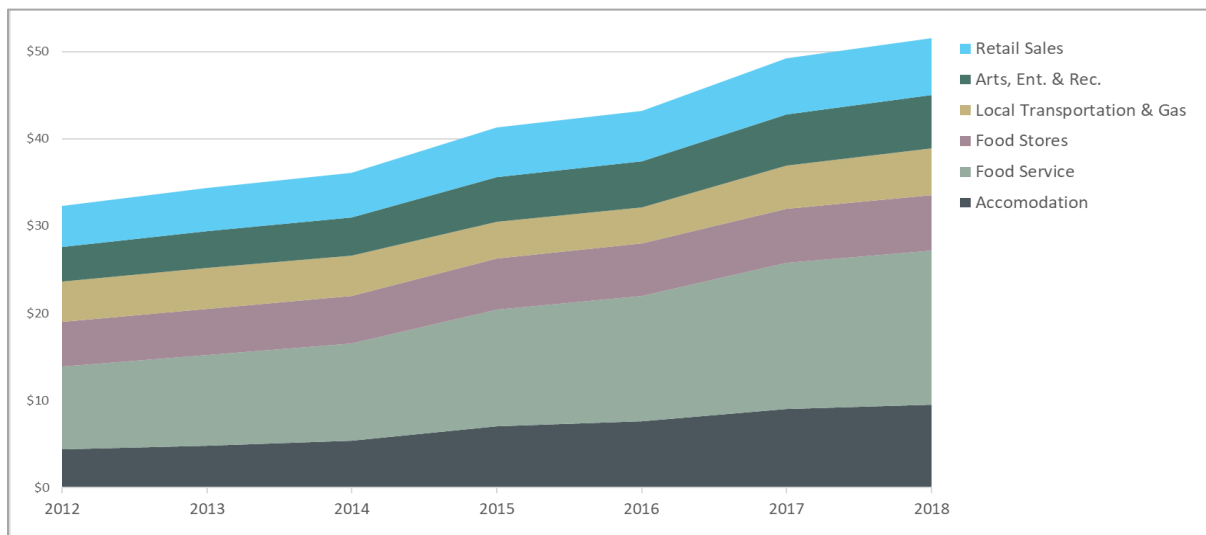


Exhibit 3.9: Klickitat County Lodging Demand Analysis

Existing Lodging Demand for Klickitat County

Accommodation Type	Facilities	Rooms	Est. Avg. Annual Occupancy Rate	Annual Room-night Demand
Hotels with Meeting Facilities	5	199	70.00%	50,845
Other Hotels/Motels/B&Bs	7	48	70.00%	12,264
Other Short-term Rooms (i.e., Air B&B)	2	2	50.00%	365
Total	14	249		63,474

Lodging Type	Visitors	Groups	Business	Total
With Meeting Facilities	65%	20%	15%	100%
Without Meeting Facilities	90%	0%	10%	100%
Other Short-term Rooms (i.e., Air B&B)	90%	0%	10%	100%

Estimated 2019 Room-night Demand by Lodging Type

Lodging Type	Visitors	Groups	Business Travelers	Total
With Meeting Facilities	33,049	10,169	7,627	50,845
Without Meeting Facilities	11,038	-	1,226	12,264
Other Short-term Rooms (i.e., Air B&B)	329	-	37	365
Total	44,415	10,169	8,890	63,474

Estimated 2040 Room-night Demand by Lodging Type**

Lodging Type	Visitors	Groups	Business Travelers	Total
With Meeting Facilities	82,414	12,298	9,497	104,209
Without Meeting Facilities	27,524	-	1,527	29,052
Other Short-term Rooms (i.e., Air B&B)	819	-	45	865
Total	110,757	12,298	11,070	134,125

Existing Lodging Rooms	Net New Room-Night Demand	Total Supportable Rooms by 2040*	Net New Supportable Rooms*	% Needing Meeting Facilities
249	70,652	645	396	78%

*Assumes 70% minimum required average annual occupancy.

** Future roomnight demand based on the following growth rates/sources:

Visitors	4.67%	Dean Runyan Travel Impacts, Klickitat County, 2010-2018
Groups	0.96%	WA OFM Population Forecast (High Series) 2017-2040
Business Travelers	1.10%	WA ESD, South Central WA Job Forecast (2017-2027)

Compiled by FCS GROUP.

III.B. EMPLOYMENT GROWTH FORECAST

The Washington Employment Security Department (ESD) prepares employment forecasts for “regions” throughout Washington; and defines Kittitas, Yakima, Skamania and Klickitat counties as the South-Central Region. The South-Central Region is expected to experience moderate growth over the next 10 years in almost all sectors, with most new job growth expected in services, retail, industrial and government. For analysis purposes, FCS extrapolated the regional job growth forecast for a 20-year period.

As reflected below in **Exhibit 3.10**, a range of low, medium, and high capture rates of job growth are assumed for long range planning purposes. The **low capture rate** reflects the 2018 share of employment within Klickitat County in proportion to the South-Central Region. The **high capture rate** reflects a doubling of the low capture rate (for all sectors except Government which is held

constant at the low rate assumption). The *medium capture rate* reflects the midpoint between the low and high assumption.

Exhibit 3.10: Klickitat County Capture Rate Assumptions (share of South-Central Region)

	Klickitat County Capture (low/current)	Klickitat County Capture (high)	Klickitat County Capture (midpoint)
Industrial*	8.2%	16.4%	12.3%
Retail	2.8%	5.5%	4.1%
Services	3.5%	7.1%	5.3%
Government	6.5%	6.5%	6.5%

** Reflects construction, light ind., warehousing, mfg. and data/com businesses.*

Does not reflect demand for special sites, data centers or energy operations.

FCS also evaluated trends in Klickitat County employment capture rates within the larger South-Central Region to inform a “fair share” capture rate for three main county subareas.

These areas include:

- West County (extends from White Salmon/Bingen to Lyle);
- Central County (includes Dallesport, Goldendale and Wishram); and
- East County (includes Roosevelt, Alderdale and other rural portions of the east county).

The employment forecast is summarized in **Exhibit 3.11**. Over the next 20 years, Klickitat County employment could increase by 1,315 jobs (low) to 2,206 jobs (high); and thereby accommodate between 5.1% and 8.6% of the South-Central Region’s job growth.

Exhibit 3.11: Klickitat County 20-year Employment Forecast

	Low	Medium	High
Industrial*	393	589	785
Retail	50	75	99
Services	446	669	892
Government/other	426	428	429
Total	1,315	1,760	2,206

** Reflects construction, light ind., warehousing, mfg. and data/com businesses.*

Does not reflect demand for special sites, data centers or energy operations.

Source: FCS GROUP, based on fair share capture rates of regional growth forecast.

Target Industries

Klickitat County developed a county-wide 10-year economic development strategic plan that outlines goals and actions in pursuit of economic development. Goals included the identification of catalyst development opportunities, workforce development, identification of programs and services and implementation strategies. The plan also identified target industry clusters for Klickitat County by geographic region (west, central and east county).

West Klickitat County (includes White Salmon):

- High-Tech Industry, including UAV and composite industries.

- Forest Products Industry
- Wine Production Industry

Entire County:

- HUBZone Certification, leveraging the Small Business Administration program which provides qualified businesses with prioritized access to federal contracting opportunities. One business county-wide is presently certified.

III.C. EMPLOYMENT LAND NEEDS

FCS GROUP evaluated employment patterns within Klickitat County to estimate low, medium and high growth potential for subregions. The 20-year employment land need forecast provided in **Exhibit 3.12** reflects the potential amount of new development (buildable land needs) required to accommodate the job growth described above. The overall employment land needs required to address long-term growth in the west portion of the county would require 8 to 19 net acres of commercially zoned land and 16 to 35 net acres of industrially zoned land.

Exhibit 3.12: Klickitat County Employment Land Need by Scenario (Buildable Acres)

Commercial	Low	Medium	High
West County	8	14	19
Central County	7	13	18
East County	-	1	2
Total	15	27	39
Light Industrial & Public*	Low	Medium	High
West County	16	26	35
Central County	51	88	124
East County	-	4	8
Total	67	117	168

** Reflects construction, light ind., warehousing, mfg. and data/com businesses.*

Does not reflect demand for special sites, data centers or energy operations.

Excludes new school or parks facilities and related land requirements.

Not all business and job growth will require new sites or developable land. While existing White Salmon commercial building vacancies are reported to be very low (5% or less), businesses (and government entities) can usually add employees without the need to develop additional floor area. For example, restaurants can add hourly workers during peak times to handle increased trade in the short term. Companies, such as Insitu, which laid off workers in 2019, can rehire workers if business picks up and utilize vacant workstations. This phenomenon is usually limited to the short-term, and is referred to as the “building refill factor.”

Building refill factors in the White Salmon/Bingen area is expected to range from 10% for service jobs to 20% for retail and government/other jobs and 50% for industrial jobs. After accounting for expected job growth, refill rates, and new building floor area, the projected employment growth for White Salmon/Bingen will likely require 9 acres (low) to 22 acres (high) for industrial and 9 acres (low) to 18 acres (high) for commercial/other uses over the long term (**Exhibit 3.13**).

Exhibit 3.13: White Salmon/Bingen Employment Land Need (buildable acres)

White Salmon/Bingen Area Land Needs (buildable acres), 20 year forecast***

Employment Growth (jobs)		Low	Medium	High	
Industrial*		100	166	243	
Retail		13	23	36	
Services		142	247	375	
Government/other**		136	147	159	
Total		391	584	813	
Building Area (SF)		Low	Medium	High	
	Avg. SF per Job				
Industrial*	1,000	100,252	166,474	243,428	
Retail	500	6,527	11,609	17,904	
Services	450	63,804	111,094	168,643	
Government/other**	350	47,426	51,478	55,556	
Total Floor Area (SF)		218,009	340,656	485,530	
Land Need (acres)		Low	Medium	High	
	Bldg. FAR				
	Bldg. Refill factor				
Industrial*	0.15	0.50	9	16	22
Retail	0.3	0.2	0	1	1
Services	0.35	0.1	5	8	12
Government/other**	0.25	0.2	4	5	5
Total			18	29	41

* Reflects construction, light ind., warehousing, mfg. and data/com businesses.

Does not reflect demand for special sites, data centers or energy operations.

Excludes new school or parks facilities and related land requirements.

Building FAR is ratio of building floor area to land area. Refill factor is share of jobs added in existing space.

III.D. STAKEHOLDER INPUT

Stakeholders indicated that communities in the western part of Klickitat County have real challenges with the perceived lack of available buildable lands, low housing affordability and lack of vacant for-lease commercial and industrial buildings. Local topography and the National Scenic Area development restrictions contribute to the perception that there is not enough available land that can be developed. Some stakeholders described the feeling of “land being off limits” and, therefore, unavailable to help accommodate the growth pressures the community is experiencing.¹

According to stakeholders, there are negative impacts to economic development resulting from this competitive and expensive housing market. It was noted that many new employees search for long-term housing six months or longer, and a large portion end up facing long commutes to jobs in White Salmon/Bingen after moving to Goldendale or Carson, which generally have more affordable workforce housing options.

¹ A more detailed summary of stakeholder input is provided separately in Appendix B.

White Salmon and Bingen have strong job markets with low unemployment. Stakeholders noted that when layoffs do occur, it is the result of companies “right-sizing” their workforce and is generally not a reflection of the health of the local economy.

There is strong demand for industrial space in the White Salmon and Bingen area. However, one challenge for the community is that there is a lack of vacant sites with water/sewer/power service and few vacant industrial buildings. Stakeholders noted that there are many small vacant sites at the Port of Klickitat but some of these properties are missing water and power hookups.

One recurring hurdle discussed by stakeholders is the cost of industrial development. Land in the White Salmon and Bingen area is expensive and building new industrial buildings from bare ground often does not pencil out for business owners. One local industrial business recently downsized by more than 80 employees, in part because the company was unable to find adequate industrial space within budget. Physical limitations of the transportation network may be partly responsible for high industrial development costs; heavy construction equipment is hard to get to White Salmon and Bingen due to height and width restrictions on the various tunnels and bridges serving the area.

Demand for commercial space is high as well; especially for restaurants and business incubator space. While restaurants are subject to seasonal swings in business (they reportedly struggle during the winter), stakeholders recognize that diverse and plentiful choices in dining and other services drive additional development and investment, leading to a vibrant economy. What little commercial space is available, is largely unaffordable for most small businesses. In addition to the Port’s plans and vision, a multiuse development at the Port area, that includes commercial space for restaurants and other small businesses, was repeatedly mentioned by stakeholders as an exciting potential prospect.

Local schools have indicated that they have enough space and land inventory to expand and modernize their campuses over the coming years. This alleviates the pressure for the community to consider reserving additional land for school expansion.

One stakeholder suggested that additional commercial development (such as restaurants and entertainment) is needed in White Salmon or Bingen. A lack of commercial is hampering economic development and limiting growth by existing industrial businesses. One business employer noted that to attract and retain workers, existing industrial businesses must offer higher than average wages to make up for the paucity of commercial amenities.

Other stakeholders suggested that construction and development costs for commercial and industrial buildings have risen by 20 to 30 percent over the past five years, making new development out-of-reach for not just small but also large business owners. Stakeholders noted that long development timelines are partly responsible for this increased cost, with the average wait time from ground-breaking to occupation in excess of two years. Contributing factors to these timelines include navigating the permitting and inspection process, as well as the backlog in site preparation and building construction due to the ongoing labor shortage.

III.E. EMPLOYMENT LAND POLICY CONSIDERATIONS

Based on the buildable land inventory (BLI) documented in Section II and Appendix A, the remaining buildable vacant land in the City of White Salmon is fairly limited. The Riverfront District zoned land includes approximately 6 tax lots with 5.1 acres of vacant buildable land area, and 5 tax lots with slightly over 9 acres of redevelopable land area. Within the Commercial category, there are 3 tax lots with a total

of 5.6 acres of potentially redevelopable land, which could potentially become a location for retail, restaurants, hotel or services.

The remaining buildable employment land within the City of White Salmon may be suitable for addressing *retail and service* land needs (5 to 9 acres) under the low and medium growth forecasts.

Remaining buildable land in Bingen is likely to address a portion of the retail and service land needs, along with most of the *industrial* land demand (9 to 22 acres) for the combined White Salmon/Bingen area.

Recommended employment-related policies for the City of White Salmon focus on providing adequate public infrastructure and facilities (such as water, sanitary sewer and telecommunications) which are further discussed in the next section.

Section IV. HOUSING NEEDS

This housing needs analysis represents a 20-year forecast from the base year (2020) through year 2040. These technical findings are intended to provide information for long-range planning for land use and infrastructure.

IV.A. MARKET TRENDS

With a population of 2,610 year-round residents (2019 WA Office of Financial Management), White Salmon is the second largest city in Klickitat County. In terms of new housing development, the White Salmon/Bingen area accounted for approximately 20-25% of the housing growth in the county over the past two decades. As shown in **Exhibit 4.1**, approximately 580 dwellings were added in the City of White Salmon between 1990 and 2018.

Exhibit 4.1: White Salmon Households and Dwelling Units

	1990	2000	2010	2018
Households	763	887	889	1,107
Avg. HH Size	2.43	2.46	2.23	2.2
Dwelling units	816	949	1,087	1,396

Source: U.S. Census, and American Community Survey 2013-2018 estimates.

Existing Housing Characteristics

The current housing stock in White Salmon consists of approximately 1,396 housing units. This inventory is dominated by single single-family detached homes which accounts for 69% of all housing. Townhomes, plexes and apartments comprise 20% of the inventory. Mobile homes comprise 11% of inventory (**Exhibit 4.2**). It should be noted that the “mobile home/other” housing type also includes manufactured housing.

Exhibit 4.2: White Salmon Housing Types, 2018

	2000		2018	
	#	%	#	%
Single Family Detached	606	64%	968	69%
Townhomes/Plexes/Apts	211	22%	275	20%
Mobile Home/Other	131	14%	153	11%
Total Housing Units	948	100%	1,396	100%

Source: U.S. Census, and American Community Survey estimates.

As shown in **Exhibit 4.3**, between 2000 and 2018, the City of White Salmon accounted for 27% of the overall net increase in housing added within Klickitat County, and approximately one third of the net new multi-family housing (5 or more units per structure).

Exhibit 4.3 White Salmon and Klickitat County Housing Units

	Klickitat County	White Salmon	% in White Salmon
Single Family Detached	7,600	889	12%
Townhouses / Plexes	748	153	20%
Multi Family (5+ units)	387	128	33%
Mobile Homes/other	1,566	170	11%
Total	10,301	1,340	13%

Change in Dwellings	Klickitat County	White Salmon	% in White Salmon
2000 to 2018	1,668	448	27%

Source: U.S. Census, and American Community Survey estimates.

Tenancy and Vacancy Rates

Over the past two decades, there has been a measurable increase in the share of seasonal housing in White Salmon. While owner-occupied housing is still the predominant form of tenancy, the seasonal/vacant housing inventory increased from 6% to 21% of the housing inventory between 2000 and 2018 (**Exhibit 4.4**).

Vacancy rates for long-term rental housing in western Klickitat County is reported to be well below 5% currently, as housing demand continues to outpace growth in housing supply.

Exhibit 4.4 White Salmon Housing Tenancy and Seasonal/Vacant Supply

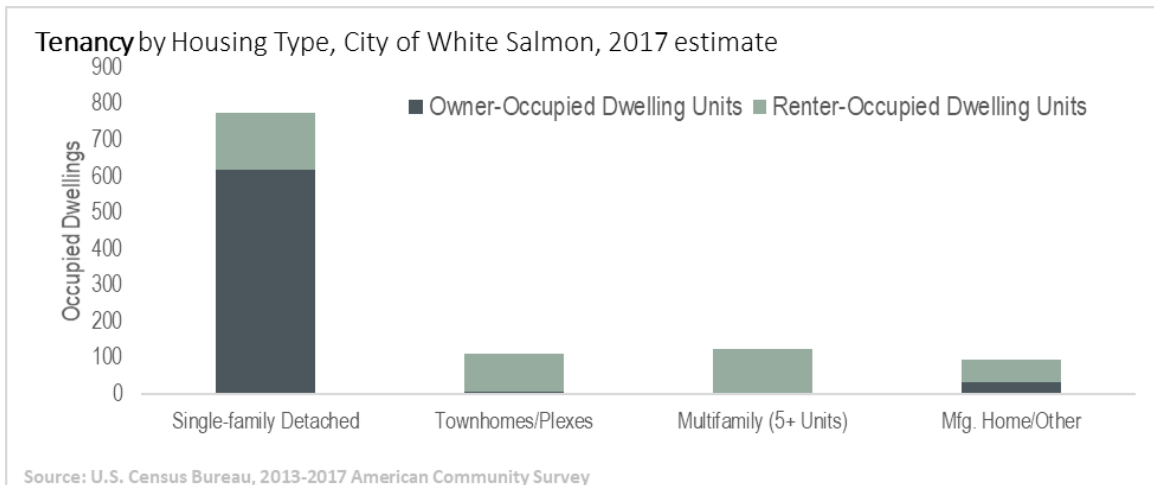
	2000		2010		2018	
	#	%	#	%	#	%
Housing Tenancy						
Owner Occupied Units	507	53%	516	47%	660	47%
Renter Occupied Units	380	40%	405	37%	447	32%
Subtotal	887	94%	921	85%	1,107	79%
Other Units *	61	6%	166	15%	289	21%
Total Housing Units	948	100%	1,087	100%	1,396	100%

* includes seasonally-occupied units, short term rentals and other vacant units.

Source: U.S. Census, and American Community Survey 2013-2018 estimates.

As shown in **Exhibit 4.5**, most homeowners in White Salmon reside in single-family detached homes and most renters occupy townhomes and multifamily housing products. Occupants within mobile homes include a mix of 65% renters and 35% owners.

Exhibit 4.5: White Salmon Tenancy



Housing Construction and Home Sales

During the past several years new building construction in Klickitat County has been dominated by single-family housing. Despite falling slightly following the recession, the county has issued an average of 91 single-family permits annually for new construction since 2008.

Within Klickitat County, median home sales prices increased by nearly 4.8% (November 2018 to November 2019) to \$307,000. Median home prices in White Salmon recorded a year-over-year increase of 5.9% from \$427,000 in 2018 to \$454,000 in 2019 (**Exhibit 4.6**).

Exhibit 4.6: Home Sales Prices by Local Area

	Nov. 2018	Nov. 2019	Change %
Klickitat County	\$293,000	\$307,000	4.8%
Alderdale	n/a	n/a	n/a
Bingen	\$270,000	\$285,000	5.6%
Dallesport	\$266,000	\$284,000	6.8%
Goldendale	\$170,000	\$179,000	5.3%
Husum	n/a	n/a	n/a
Lyle	\$247,000	\$259,000	4.9%
Roosevelt	\$116,000	\$114,000	-1.7%
Trout Lake	\$427,000	\$454,000	6.3%
White Salmon	\$427,000	\$452,000	5.9%
Wishram	n/a	n/a	n/a

Note: Zillow's study areas are larger than the city limits of the above areas. N/A = no data available.

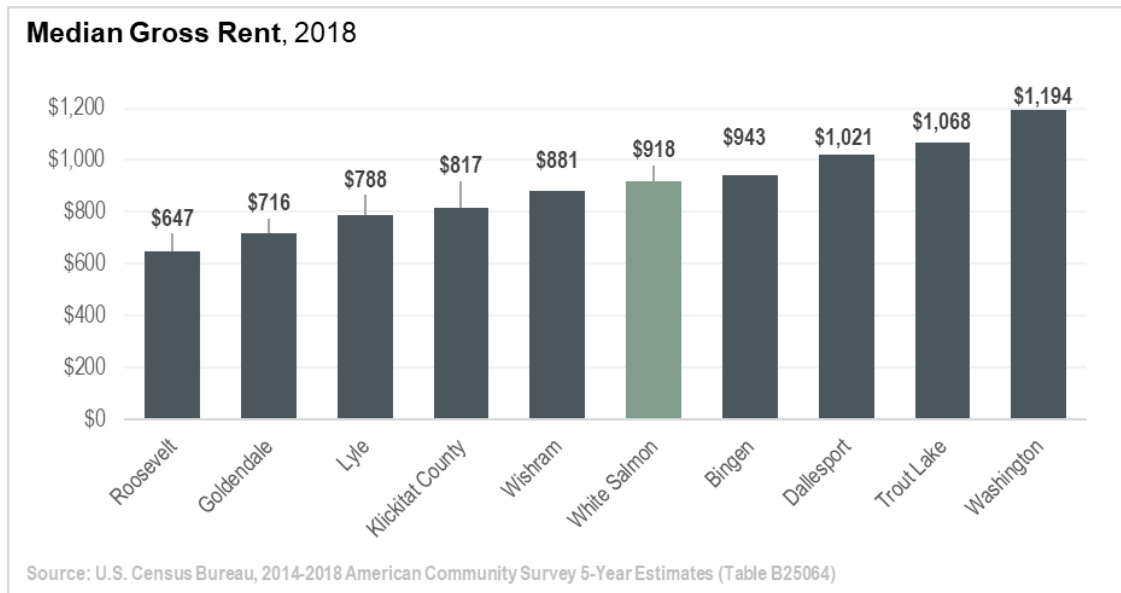
Source: Zillow.com Home Value Index; compiled by FCS GROUP.

Rents

According to U.S. Census estimates, the 2018 median rent in White Salmon was \$918, which was Klickitat County was \$791). This level was about 12% higher than Klickitat County as a whole (**Exhibit 4.7**). Given the fact that U.S. Census data understates current rental rates, and housing

prices are rising faster than income levels, it is apparent that housing affordability is a growing concern.

Exhibit 4.7: Median Rents by Location



Owner/Renter Characteristics

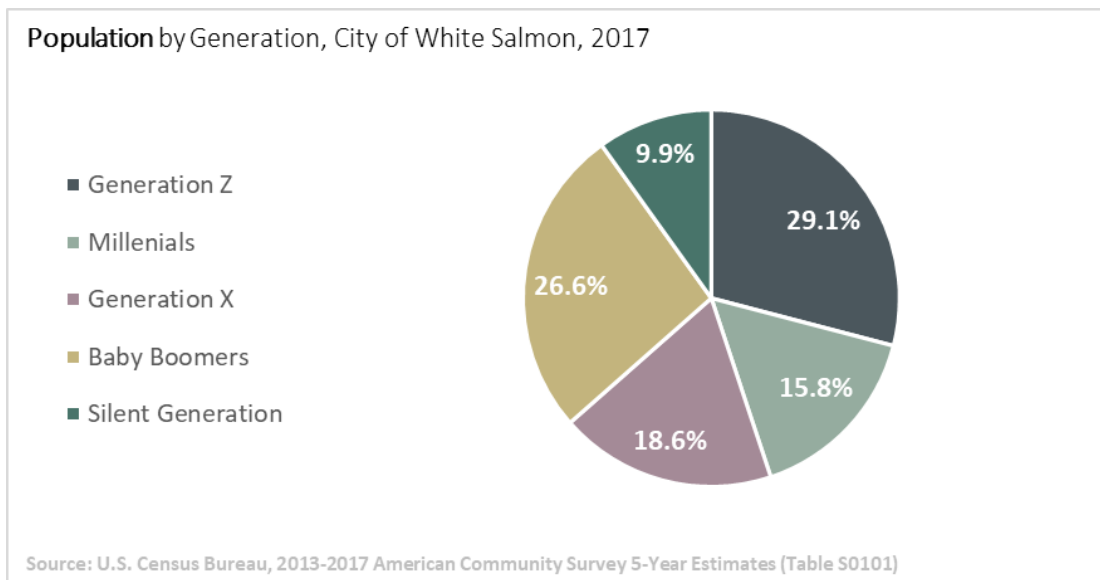
There is a linkage between demographic characteristics and housing choice, as housing needs change over a person's lifetime. Other factors that influence housing include:

- Homeownership rates increase as income rises.
- Single-family detached homes are the preferred housing choice as income rises.
- Renters are much more likely to choose multi-family housing options (such as apartments or plexes) than single-family housing.
- Very low-income households (those earning less than 50% of the median family income) are most at-risk for becoming homeless if their economic situation worsens.

The relationship between population cohorts and housing needs can be used to forecast future housing needs.

White Salmon has a relatively older population than the state average. In White Salmon, 21.5% of the population are 65 or older, compared to 14.7% for Washington as a whole. The median age of county residents was 41 in 2017, compared with the State median age of 37.6.

Exhibit 4.8: White Salmon Population Cohorts



Greatest/Silent Generation (those born before 1925 to 1945)

This includes retirees over age 74, who were raised during the Great Depression, World War I or World War II. This cohort accounts for 10% of the City's population. As they reach their 80s some move into assisted living facilities with convenient health care services.

Baby Boom Generation (those born 1946 to 1964)

Baby boomers (currently age 55 to 74) account for 27% of residents. The boomer segment has been growing more rapidly than the other cohorts and many are now entering their retirement years. Boomers usually prefer to "age in place" but may downsize or move in with family members (sometimes opting to reside in accessory dwellings off the main house).

Generation X (born early 1965 to 1980)

Gen X (currently includes people between age 39 to 54) account for 19% of residents. GenX households often include families with children, and many prefer to live in single-family detached dwellings at various price points.

Millennials (born early 1980s to early 2000s)

Millennials (currently in their twenties or thirties) accounted for 16% of residents. Younger millennials tend to rent as they establish their careers and/or pay back student loans. Working millennials often become first-time homebuyers, opting to purchase smaller (attainable) single-family detached homes or townhomes.

Generation Z (born mid-2000s or later)

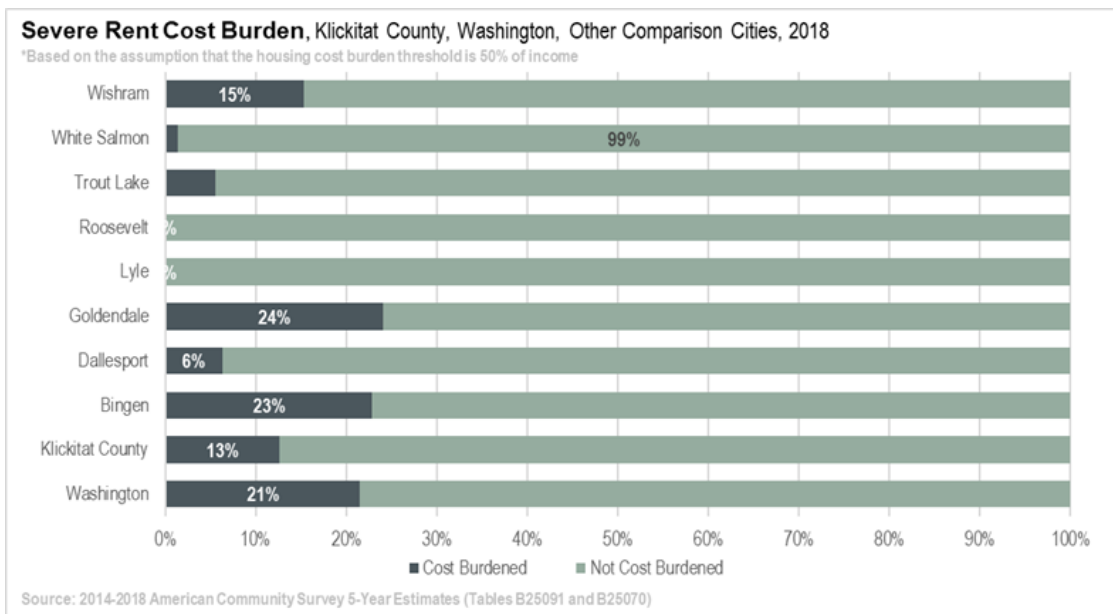
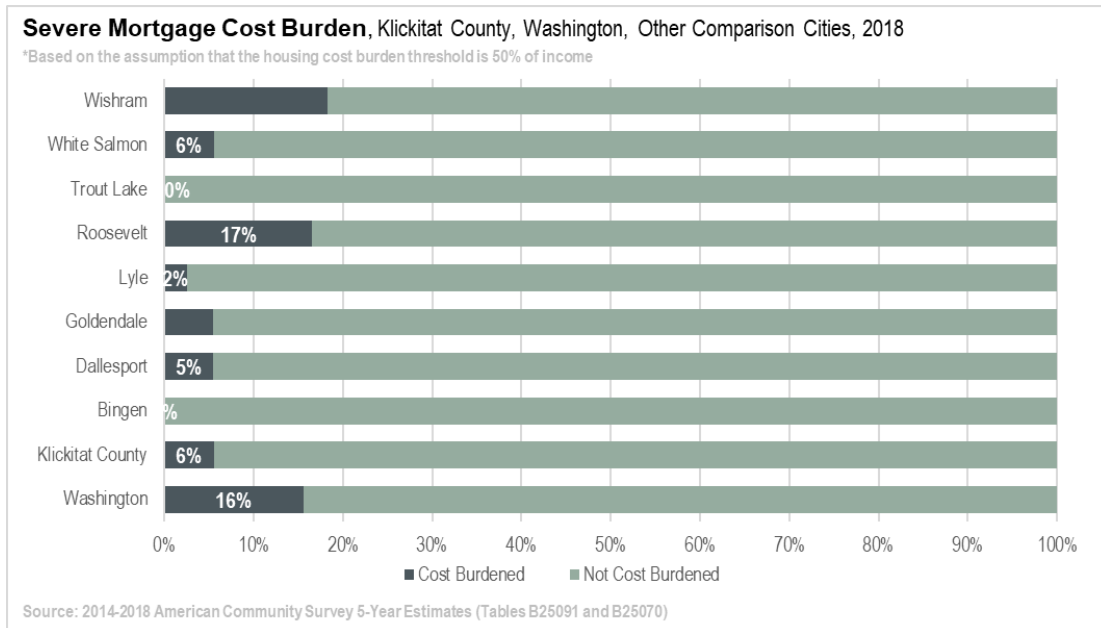
GenZ includes residents under age 20, which accounted for 29% of residents. This segment mostly includes children living with Gen Xers or younger Baby Boomers.

IV.B. HOUSING AFFORDABILITY

According to the U.S. Housing and Urban Development (HUD), households are considered “cost burdened” if they pay over 30% of their gross income on housing. Households are “severely cost burdened” if they pay over 50% of their gross income on housing.

As of year 2018, approximately 6% of homeowners and 13% of the renters in Klickitat County were severely cost burdened (**Exhibit 4.9**). If housing rents and home prices continue to increase faster than incomes, the share of severely cost burdened households will increase in the future.

Exhibit 4.9: Severe Housing Cost Burden by Locality



To help gauge housing attainability, FCS GROUP examined current median household income (MHI) (**Exhibit 4.10**) data for Klickitat County. The 2018 MHI estimate for Klickitat County was \$54,056.

HUD guidelines for housing affordability assume 30% of income is allocated to housing; therefore middle-income families earning 80% of the MHI, should be able to afford monthly rents at \$1,081 or lower and homes priced at less than \$236,000. These price levels are considered “attainable” to families earning 80% of the local MHI. If households pay more than these amounts, they are likely “cost burdened” to some degree.

Using 2018 statistics, the monthly affordable housing cost for low-income families is as follows:

- Low Income, \$676 to \$1,081
- Very Low Income, \$405 to \$676
- Extremely Low Income, \$405 or less

Census Definitions

Incomes are typically classified for both “families” and “households”

A family consists of two or more people (one of whom is the householder) related by birth, marriage, or adoption residing in the same housing unit.

A household consists of all people who occupy a housing unit regardless of relationship. A household may consist of a person living alone or multiple unrelated individuals or families living together.

Klickitat County Household Income (2018)*	\$54,056	
Available Monthly Rent or Payment (@30% of income level)	Lower-end	Upper-End
Upper (120% or more of MHI)	\$1,622	or more
Middle (80% to 120% of MHI)	\$1,081	\$1,622
Low (50% to 80% of MHI)	\$676	\$1,081
Very Low (30% to 50% of MHI)	\$405	\$676
Extremely Low (less than 30% of MHI)	\$405	or less
Approximate Attainable Home Price**	Lower-end	Upper-End
Upper (120% or more of MHI)	\$353,000	or more
Middle (80% to 120% of MHI)	\$236,000	\$353,000
Low (50% to 80% of MHI)	\$147,000	\$236,000
Very Low (30% to 50% of MHI)	\$88,000	\$147,000
Extremely Low (less than 30% of MHI)	n/a	n/a

Notes:

* based on current U.S. Census estimates of household income for Klickitat County.

** assumes 5% down payment on 30-year fixed mortgage at 4.0% interest.

Source: analysis by FCS GROUP using U.S. Census, Amercian Community Survey, 2013-18 data.

Exhibit 4.10: Analysis of Attainable Housing Price/Rents

By comparison, the current U.S. Housing and Urban Development (HUD) Fair Market Rents in Klickitat County range from \$674 for an efficiency unit to \$1,388 for a four-bedroom unit, as shown below. According to input received from stakeholders, there are very few (if any) non-government subsidized properties that would meet HUD fair market rents in White Salmon.



Point in Time Homeless Residents

The homeless population in Klickitat County has fluctuated between zero and 120 over the past decade. In 2019, Klickitat County’s homeless population included 17 (down from 33 in 2018) people or about 0.06% of the statewide homeless count, which is less than the county’s 0.29% overall share of statewide population. Stakeholder input indicates that the number of homeless residents appears to have increased between 2019 and 2020.

Measures of Economic Hardship

Like many growing communities across the western U.S., 1 in 3 Klickitat County households are experiencing economic hardship as the cost of living rises faster than income levels.

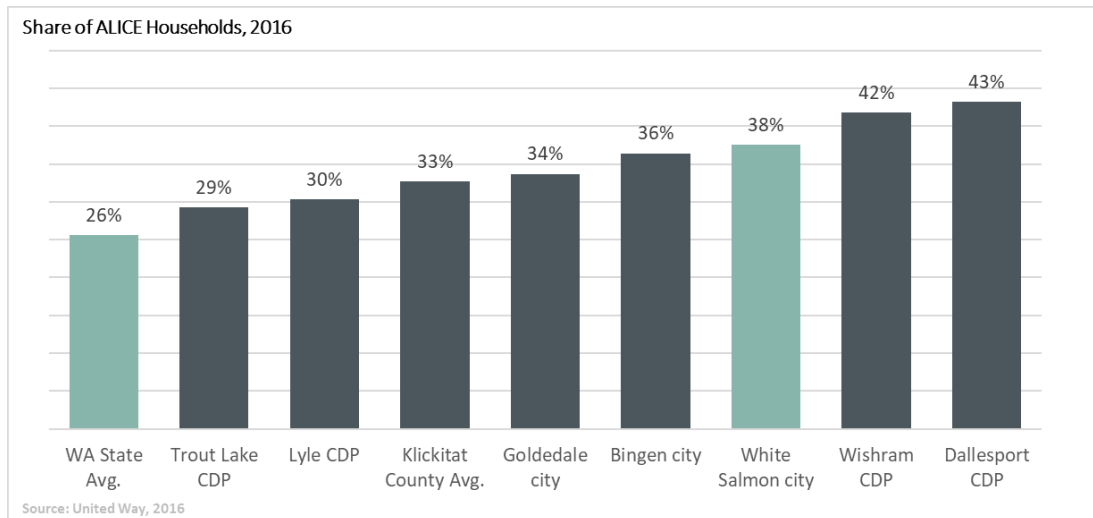
Since the War on Poverty began in 1965, the Federal Poverty Level (FPL) has provided a standard for determining the proportion of people living in poverty in the U.S. Despite the FPL’s benefit of providing a nationally recognized income threshold for determining who is poor, its shortcomings include the fact that the FPL is not based on the current cost of basic household necessities, and except for Alaska and Hawaii, it is not adjusted to reflect cost of living differences across the U.S.

In fact, federal poverty statistics indicate that the number of Klickiat County households living in poverty decreased by 309 between 2010 and 2016. In 2016 14.4% of the households in Klickitat County and 12.1% of White Salmon households met federal poverty thresholds compared with the state average of 10.9%.

In recognition of the short comings associated with federal poverty statistics, the United Way now provides a new measure of economically distressed households struggling in each county in a state. This effort provides a framework, to measure households that do not earn enough to afford basic necessities, with a population segment called ALICE (Asset Limited, Income Constrained, Employed).

As shown below, in 2016, the Washington state ALICE threshold was 26%, which is well below the ALICE share of households for most Klickitat County, particularly White Salmon which had a ALICE share of 38% (**Exhibit 4.11**).

Exhibit 4.11 Share of ALICE Households (Asset Limited Income Constrained Employed)

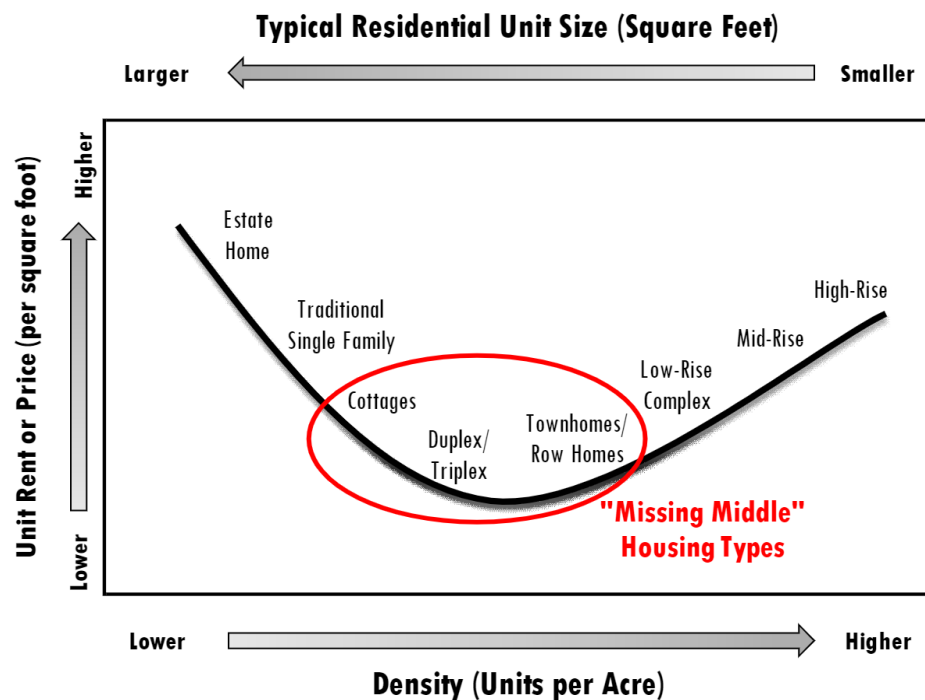


Middle Housing Demand

Representatives from local businesses and public agencies have expressed concern over the lack of attainable and good quality workforce housing for their employees. To find attainable housing, some workers must travel long distances to between their homes and their jobs to find attainable housing.

Given the need for workforce housing, the City will need to spur development of additional “middle income” housing types, such as apartments, plexes, townhomes, cottages, manufactured homes and accessory dwelling units (ADUs). These housing types can be delivered at a lower cost and rent level per square foot than standard single family detached and mid-rise housing types (**Exhibit 4.12**).

Exhibit 4.11 Middle Housing Types



Source: Washington Department of Commerce Housing Memorandum (PNW Economics and LDC)

IV.C. HOUSING NEEDS FORECAST

Klickitat County Housing Needs Forecast

The Klickitat County housing needs analysis is based on population growth of 0.96% annually over 20 years.² This would result in a countywide population increase of approximately 4,719 year-round residents. After accounting for group quarters and seasonal housing demand, it is expected that the market for housing in Klickitat County will require about 2,259 net new dwelling units over 20-30 years (**Exhibit 4.12**).

Housing demand within the western portion of the County is expected to account for approximately 59% of the county’s total demand or 1,330 dwellings. About 80% of the future housing demand in the western county will likely be supported by year-round residents (through in-migration). The remaining 20% market share of future housing demand would be derived from seasonal residents and visitors.

Exhibit 4.12: Projected Klickitat County Housing Demand (20-30 year forecast)

	West County	Central County	East County	Total
Population Growth Forecast (high)	2,454	2,123	189	4,719
Group quarters population (@1.0%)	10	10	27	47
Population in Households	2,444	2,113	162	4,719
Avg. persons per occupied dwelling	2.3	2.6	2.7	2.44
Resident Housing Units	1,062	813	60	1,935
Seasonal Housing Units*	267	22	34	324
Seasonal/short term Unit Share*	19.5%	1.5%	10%	
Total Housing Demand (dwelling units)	1,330	835	94	2,259
Distribution of Housing Demand	59%	37%	4%	100%

Source: FCS GROUP based on trends analysis.

In consideration of each subarea, FCS evaluated population and housing market demand patterns to estimate long-term growth in housing. Given the lack of buildable land and limited or no water/sewer infrastructure capacity in many western communities (Bingen, Trout Lake, Husum and Lyle), White Salmon is expected to experience strong market interest and development pressure over the next few decades.

² The 0.96% growth rate used for forecasting population is derived from the WA Office of Financial Management, high growth scenario. This scenario was selected over the middle growth scenario (0.05% growth rate) because it most closely reflects that 1.2% actual rate of population growth that has occurred between 2010-2018.

Exhibit 4.13 summarizes the expected market capture estimates for key focus areas. The White Salmon area is projected to “capture” approximately 45% of the overall net new housing demand within Klickitat County.

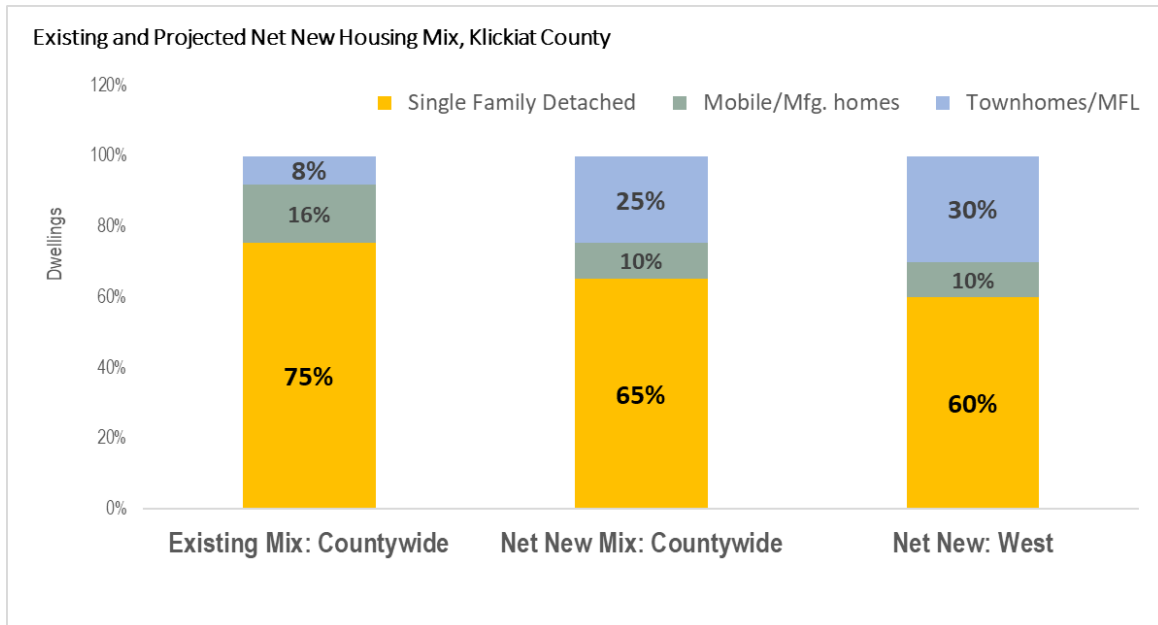
Exhibit 4.13: Projected Market Capture of Housing Demand

Housing Demand Forecast	Single family Detached (low density)	Mobile/Mfg. Homes & Cottages	Townhomes/ Plexes/ADU/ MFL	Total
West County				
White Salmon Area	27%	4%	15%	45%
Bingen Area	5%	1%	3%	8%
Husum /Trout Lake	2%	1%	0%	3%
Lyle	2%	1%	0%	2%
Subtotal West	35%	6%	18%	59%
Central County				
Dallesport/Murdock	5%	1%	0%	6%
Goldendale	22%	2%	5%	30%
Wishram	1%	0%	0%	1%
Subtotal Central	28%	4%	6%	37%
East County				
Alderdale	1%	0%	1%	2%
Roosevelt	1%	0%	1%	2%
Subtotal East	2%	0%	1%	4%
Total Klickitat County				
Residential Demand (Dwelling units)	65%	10%	25%	100%

Source: based on trends analysis.

To address changing demographic and householder preferences, the future housing mix is likely to shift towards more diverse housing options. The optimal housing mix in western Klickitat County is expected to require 60% detached single family housing, 30% townhomes/plexes/multi-family low rise (MFL), and 10% mobile/manufactured homes (**Exhibit 4.14**).

Exhibit 4.14: Projected Housing Mix



White Salmon Housing and Land Needs Forecast

To address future housing growth, the White Salmon Area should plan for approximately 1,019 net new housing units over the next 20-30 years. Future housing demand is likely to include 602 detached housing units, and 338 townhomes/plexes/ADU/multi-family units and 80 dwellings within planned mobile home or manufactured home parks or cottage clusters (**Exhibit 4.15**).

Exhibit 4.15: Projected Housing Demand in White Salmon Area

Housing Demand Forecast	Detached Homes	Mobile/Mfg. Homes & Cottages	Townhomes/ Plexes/ADU/ MFL	Total
West County				
White Salmon	602	80	338	1,019
Bingen	114	19	57	189
Husum /Trout Lake	49	20	-	69
Lyle	34	14	4	53
Subtotal West	798	133	399	1,330
Total Klickitat County				
Residential Demand (Dwelling units)	1,476	226	557	2,259

Source: based on market trends.

As noted earlier in Section II, based on buildable land inventory findings, current zoning, and average housing density assumptions, the White Salmon city limits has the potential to add approximately 479 net new dwellings at full utilization of vacant and part-vacant tax lots (**Exhibit 4.16**).

Exhibit 4.16: Projected Housing Capacity in City of White Salmon

City of White Salmon Buildable Land (acres) and Dwelling Capacity (units)*

	RL	R-1	R-2	R-3	Total
Vacant	37.1	44.3	15.2	3.9	100.5
Part-Vacant	0.0	5.2	0.0	0.0	5.2
Redevelopable	1.0	9.6	0.6	0.6	11.8
Total Acres	38.1	59.1	15.8	4.5	117.5

	RL	R-1	R-2	R-3	Total
Avg. Density (units/acre)	2.0	4.0	10.0	14.0	
Dwelling unit capacity					
on vacant land	74	177	152	54	458
on part-vacant land	0	21	0	0	21
Total Dwellings	74	198	152	54	479

* Depicts estimated housing capacity within City limits, assuming 100% utilization of vacant and part-vacant lands.



As indicated below, it is expected that average “urbanized” housing densities will range from: 4 dwellings/acre for single-family detached housing; 10 dwellings/acre for mobile homes; and 14 dwellings/acre for townhomes and multi-family low rise developments.

Housing Units per Acre Density	West County
Single Family Detached	4.0
Mobile/Mfg. Home Park	10.0
Townhome/ADU/Multifamily	14.0

The majority of the future residential land need for the White Salmon Area (150 net buildable acres) will be in the single-family detached zones (RL, R1 and PUD) categories. Medium-density (R-2 and R-3) zones would require approximately 24 net buildable acres, and mobile home park (MHP) zones would likely require 8 acres (see **Exhibit 4.16**).

Exhibit 4.16: White Salmon Area Housing Land Needs (buildable acres)

	Single-Family Detached (RL, R-1)	Mobile/Mfg. Home Park (MHR)	Medium Density (R-2-3)	Total
West County				
White Salmon Area	150	8	24	182
Bingen Area	28	2	4	34
Husum /Trout Lake	12	2	-	14
Lyle	9	1	0	10
Subtotal West	199	13	28	241
Total Klickitat County				
Residential Land Needs (net acres)	403	22	42	466

Source: based on prior tables.

Urbanization Requirements

As we compare the baseline housing demand forecast shown above with the remaining buildable residential land area within the City of White Salmon, we can make informed findings about potential land use regulations and urbanization requirements.

If the City captures 100% of the White Salmon Area housing demand, the total amount of buildable land needed to address future housing growth in the the City is expected to require approximately 182 buildable acres; whereas the existing vacant and part vacant land supply consists of 117 acres. In this scenario, the City of White Salmon would likely need to annex at least 76 acres of buildable land area over the next 20-30 years to meet future housing demand requirements (**Exhibit 4.17**).

During review of the draft Urbanization Study, a White Salmon Planning Commissioner noted that the 100% City Capture scenario is not likely since the majority of single-family detached demand has been occurring outside the City (in rural county locations). It was noted that over the past seven years (2013 to 2019), 304 new housing construction permits were issued in the White Salmon Area, including 60% in the City and 40% in the county. During this time, single family detached permits accounted for 45% of the City’s housing construction, and 81% of the new housing within the County area. It was noted that if these trends continue, the potential demand for new single-family housing in the City would diminish.

In any event, to address the growing demand for cottages, townhomes, plexes and apartments, the City should consider rezoning (discussed below) to allow for new medium-density housing which will require approximately 12.9 acres of additional medium-density zoned land to meet demand.

Exhibit 4.17: Reconciliation of Land Need for Housing (buildable acres)

	Low Density (RL, R1)	Medium Density (MHP, R2, R-3)	Total
Projected Land Need for Housing	150.0	32.0	182.0
Less: Vacant Land Supply in City	(86.6)	(19.1)	(105.7)
Equals: Additional Land Need	63.4	12.9	76.3

Source: based on prior tables.

IV.D. STAKEHOLDER INPUT

The cities of White Salmon and Bingen are considered desirable places to live, and demand for housing is strong; the current state of the tight housing market reflects this fact. The stakeholders that were interviewed as part of this study stated plainly – there is simply not enough housing stock. Prospective home buyers face a competitive landscape, and several stakeholders advised that strong cash offers are often accepted almost immediately, pricing out many first-time homebuyers or new arrivals. Finding available and affordable rental housing is also a significant challenge, particularly for White Salmon and Bingen. Stakeholders noted that average rents are borderline exorbitant, and that for most workforce employees (teachers, government employees, service workers, etc.) and young people (like interns and college students), finding a good-quality place for \$1,000 to \$1,200 per month is almost impossible.

Housing stock for low-income populations is equally slim. Recent closures of manufactured home parks are resulting in the displacement of former residents to Lyle, Klickitat, and The Dalles, or in some cases, living out of personal vehicles and RVs. One stakeholder noted that homelessness is on the rise, and that the recent point-in-time count is showing a significant increase in homeless individuals over the same point-in-time last year. Many of these homeless individuals are “couch surfing” or finding temporary living arrangements, limiting the number of people living unsheltered on city streets.

The high rate of second homes and short-term rentals are cited as one possible reason; locals are having a hard time competing with high-worth individuals from other areas looking to build a summer home in White Salmon, or investment companies buying smaller units for vacation rentals. Still, others suggest that the lack of a cohesive community vision around housing affordability and community character contribute to these challenges. While the community seems open to having the conversation in a new way, there is still work to be done around revising the zoning and development codes, investing in infrastructure (especially in the Urban Exempt Area [UEA] outside of White Salmon city limits), and redefining concepts, such as “capacity,” “infill” and “gentle density.”

Please refer to **Appendix B** for additional detail regarding stakeholder input.³

³ During review of the draft Urbanization Study, the White Salmon Planning Commission noted that in addition to the stakeholder comments, there are long-term residents that desire to keep the “village-like” atmosphere of White Salmon along with the “feel” of individual neighborhoods which is expressed in the current draft Comprehensive Plan Vision Statement.

IV.E. FINDINGS AND POLICY CONSIDERATIONS

The draft findings contained in this report support the following conclusions and policy considerations for the City of White Salmon:

Findings

- Under the Washington OFM high-growth forecast, the average long-term population growth rate for Klickitat County is forecasted at 0.96%. Since this growth rate forecast is below the actual population growth rate that occurred in Klickitat County between 2010 and 2018 (1.2%) it is used in this study for long-term urbanization planning. Based on this growth rate, the population in Klickitat County is projected to increase by 4,719 residents over the next 20-30 years.
- After accounting for group quarters housing population, seasonal housing demand and average household size characteristics, approximately 2,260 dwelling units will need to be added throughout Klickitat County over the next 20-30 years.
- The west portion of Klickitat County (including White Salmon, Bingen, Husum and Lyle) is expected to capture about 59% of the overall housing demand. The central portion of the county (including Goldendale, Dallesport, Murdock and Wishram) is projected to capture 37% of the demand, and the east portion of the county (including Alderdale and Roosevelt) is projected to capture 3% of the County housing demand over the next 20 years.
- White Salmon is the fastest growing city (in terms of population and housing) within the County, and the City is likely to capture the majority of demand for housing within the west portion of the County, as long as developable residential-zoned land and adequate water, sewer and transportation infrastructure is available. If developable land continues to diminish in the City and land prices increase relative to other areas of the county, single family housing growth will likely be “pushed” further away into Bingen, Husum, Trout Lake, or Lyle (to the extent those areas can accommodate future demand).
- These long-term forecasts support demand for approximately 1,020 housing units in the west portion of Klickitat County over the next 20-30 years, of which 75-79% would be accounted for in the White Salmon/Bingen Urban Exempt Area. As noted above, to the degree developable land diminishes and land prices increase relative to other areas of the county, this capture rate could be lower as housing demand “seeps” into other portions of county.

- Long-term housing demand in the White Salmon Area will require approximately 600 detached homes, 80 mobile/manufactured homes, and 338 middle housing types (such as townhomes, plexes, accessory dwelling units and apartments).⁴
- This amount of new housing in White Salmon Area will require approximately 150 buildable acres of low density or PUD zoned land area, 8 acres of mobile home park acres, and 24 acres of medium density (R1-R3) land area.
- The existing supply of buildable land (zoned for housing) within the existing White Salmon City limits includes approximately 73 acres of low and very low-density land, and 19 acres of medium and high-density land area. This remaining vacant land supply within the City appears to be enough for addressing single family detached housing demand but may not be enough for addressing longer-term land needs for middle housing types, such as townhomes, cottages and apartments.
- The commercial/industrial land supply within the City of White Salmon appears to be adequate for meeting long-term growth requirements. Over time, the City should encourage commercial and mixed-use redevelopment opportunities that result in a net new housing and employment opportunities.

Policy Considerations

The City of White Salmon is in the process of evaluating potential regulatory changes that are intended to address current barriers and support additional “middle housing” development, such as townhomes, plexes, cottages, ADUs and apartments. Please refer to **Appendix D** for a more detailed review of existing barriers to development along with a description of policy recommendations. The findings contained in this study support the following recommendations.

City of White Salmon

- **Allow Rezoning of Low-density Land to Allow Middle Housing.** The City should evaluate the potential for rezoning and/or annexing areas to R-2 or R-3 to allow medium and higher-density residential uses. Criteria for rezoning could include availability of water/sewer, access and proximity to services, schools and commercial uses.
- **Limit or disallow new single-family detached housing within the R-3 zone.**

• ⁴ During review of the draft Urbanization Study, the Planning Commission noted that most single-family detached housing demand can be accommodated outside the City limits within the County area, and that the City should focus on land use policies that can address the demand for other housing types.

- **Consider adopting minimum-density standards for R-3 zones.**
- **Allow accessory dwellings (ADUs) and cottage developments outright** in the R-1, R-2 and R-3 zones and consider adopting new design guidelines for ADUs and cottages that are compatible with the local area to preserve neighborhood character as infill development occurs.
- **Consider revisions to the residential development standards to mitigate barriers**, including changes to building setbacks, heights, coverage requirements and minimum lot sizes.
- Consider rezoning portions of land near downtown and the hospital district to R3, General Commercial or mixed-use, while preserving the character of historic areas and neighborhoods.
- **Develop IGA for Urbanization.** The City of White Salmon and Klickitat County staff have expressed a need for an intergovernmental agreement (IGA) between the City and the County to ensure that development standards between the two communities more cohesive as development of the urban exempt area occurs.
- **Plan for and Support Future Annexations for Housing Developments.** Based on these findings, the City may need to expand its service boundary to accommodate new housing development. Within the urban exempt area, the City should plan on annexing adjacent lands that can be efficiently served by adequate public utilities, with input from property owners, especially if these areas can include diverse housing or employment opportunities.
- **Update Public Facility Master Plans.** The availability of infrastructure is a limiting factor. Critical services, such as water, sewer, and high-speed internet, are not available in some areas of the UEA that have buildable land. It is recommended that the City work with Klickitat County to develop long-term water and sewer master plans.

Klickitat County

- **Update zoning code and development standards** to permit urban land uses and densities within the Urban Exempt Area once the IGA is established.
- **Establish a new mixed-use commercial node** within the Urban Exempt Area (UEA) for long-term development of a commercial and neighborhood center within the framework of the IGA, if extension of services is feasibility and if supported through a larger visioning effort. Priority should be given to development within the downtown and current commercial districts, while planning for longer-term commercial uses in the UEA.
- **Explore new Funding Tools and Techniques.** It is also recommended that the City of White Salmon coordinate with Klickitat County staff to explore new public funding sources and development incentives for attainable housing construction. Many of the funding tools/techniques that are available in Washington state for the construction of housing for middle and low-income residents are summarized in **Exhibit 4.18**.

These and other policy considerations will be discussed and refined based on input from the City of White Salmon and local community stakeholders.

Exhibit 4.18: Summary of Housing Funding Tools in WA State

Funding Source	Funding Focus	Required Use of Funds	Income Restrictions
Low Income Housing Tax Credits (LIHTC)	Affordable Housing & Homelessness	Creation of new units	60% of the Area Median Income (AMI) or below
Washington State Housing Trust Fund	Affordable Housing & Homelessness	Preservation, creation of new units, and supportive services	80% of the AMI or below with special focus on those at 30% of AMI or below
State Authorized Sales Tax	Affordable Housing	Development of new units & housing-related services	60% of the AMI or below
Housing Choice Voucher (Section 8)	Affordable Housing	Subsidizing rents	50% of the AMI or below
Community Development Block Grants (CDBG)	Affordable Housing	Renovations to housing stock & affordable home ownership opportunities	80% of the AMI or below
HOME Investment and Partnership Program	Affordable Housing	Development and maintenance of affordable units, subsidized rents	50% of the AMI or below
Affordable Housing Property Tax Levy	Affordable Housing	Programs identified in local affordable housing plans	50% of the AMI or below
HB 1406 Funds	Affordable Housing	Local investments in affordable housing	60% of city median family income
HUD Continuum of Care Program	Homelessness	Housing and wrap-around services for the homeless	N/A
Document Recording Fees	Homelessness	Development of homeless housing units, homelessness prevention activities	N/A
Mental Illness and Drug Dependency Tax	Homelessness	Housing and wrap-around services for mentally ill or drug addicted residents	N/A
Real Estate Excise Tax (REET)	Affordable Housing & Homelessness	Development, planning, property acquisition, maintenance of affordable housing, especially for the homeless	N/A
Lodging Tax (Hotel/Motel Tax)	Workforce Housing	Paying down debt issued to fund transit adjacent workforce housing.	N/A
Public Private Partnerships	Workforce Housing & Business Development	Usually entails private construction of housing or commercial on public land	Varies

Source: Association of Washington Cities and Municipal Research Service Center; and FCS GROUP.

APPENDIX A: BUILDABLE LAND INVENTORY BY ZONE

(Source: Klickitat County Buildable Land Inventory, April 2020)

White Salmon City

R-1 Single-Family Residential White Salmon

		0.5-1 Acres	1-5 Acres	5-25 Acres	25+ Acres	Total
Vacant	Count	15	3	2	0	44.3
	Acres	10.6	6.5	27.2	0.0	
Part-Vacant	Count	0	2	0	0	5.2
	Acres	0.0	5.2	0.0	0.0	
Redevelopable	Count	15	0	0	0	9.6
	Acres	9.6	0.0	0.0	0.0	

R-2 Two-Family Residential White Salmon

		0.5-1 Acres	1-5 Acres	5-25 Acres	25+ Acres	Total
Vacant	Count	1	2	2	0	15.2
	Acres	1.2	2.5	11.6	0.0	
Part-Vacant	Count	0	0	0	0	0.0
	Acres	0.0	0.0	0.0	0.0	
Redevelopable	Count	6	0	0	0	3.9
	Acres	3.9	0.0	0.0	0.0	

R-3 Multi-Family Residential White Salmon

		0.5-1 Acres	1-5 Acres	5-25 Acres	25+ Acres	Total
Vacant	Count	0	1	0	0	3.9
	Acres	0.0	3.9	0.0	0.0	
Part-Vacant	Count	0	0	0	0	0.0
	Acres	0.0	0.0	0.0	0.0	
Redevelopable	Count	1	0	0	0	0.6
	Acres	0.6	0.0	0.0	0.0	

Single-Family Large Lot Residential (RL) White Salmon

		0.5-1 Acres	1-5 Acres	5-25 Acres	25+ Acres	Total
Vacant	Count	2	3	2	0	37.1
	Acres	1.1	6.0	30.0	0.0	
Part-Vacant	Count	0	0	0	0	0.0
	Acres	0.0	0.0	0.0	0.0	
Redevelopable	Count	1	0	0	0	1.0
	Acres	1.0	0.0	0.0	0.0	

Appendix A (continued)

Commercial White Salmon

		0.5-1 Acres	1-5 Acres	5+ Acres	25+ Acres
Vacant	Count	0	0	0	0
	Acres	0.0	0.0	0.0	0.0
Part-Vacant	Count	0	0	0	0
	Acres	0.0	0.0	0.0	0.0
Redevelopable	Count	2	1	0	0
	Acres	1.3	4.3	0.0	0.0

RPD Riverfront District White Salmon

		0.5-1 Acres	1-5 Acres	5+ Acres	25+ Acres
Vacant	Count	4	2	0	0
	Acres	3.0	2.1	0.0	0.0
Part-Vacant	Count	0	0	0	0
	Acres	0.0	0.0	0.0	0.0
Redevelopable	Count	1	4	0	0
	Acres	0.7	8.4	0.0	0.0

White Salmon/Bingen Urban Exempt Area

Land Type	Gross Land Base	Less Constraints	Less Developed	Net Buildable Acres
Very Low Density Residential	877.7	213.6	296.3	334.8
Low Density Residential	0.0	0.0	0.0	0.0
Medium Density Residential	3.4	0.2	3.2	0.0
High Density Residential	0.0	0.0	0.0	0.0

Land Type	Gross Land Base	Less Constraints	Less Developed	Net Buildable Acres
Industrial Employment	252.2	115.1	61.4	75.7
Commercial Employment	33.5	3.9	21.5	8.1

APPENDIX B: STAKEHOLDER INPUT

(provided in separate Technical Memorandum by WSP)

APPENDIX C: POLICY CONSIDERATIONS

(provided in separate Technical Memorandum by WSP)