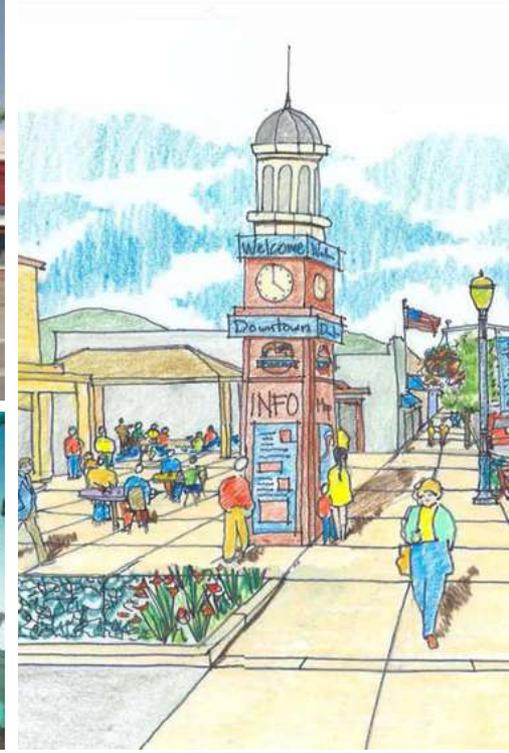


**Philomath's Housing Needs
Analysis, Economic Opportunities
Analysis, Buildable Lands
Inventory, and Main Street Plan**

Project Advisory Committee Meeting #3

July 15, 2020

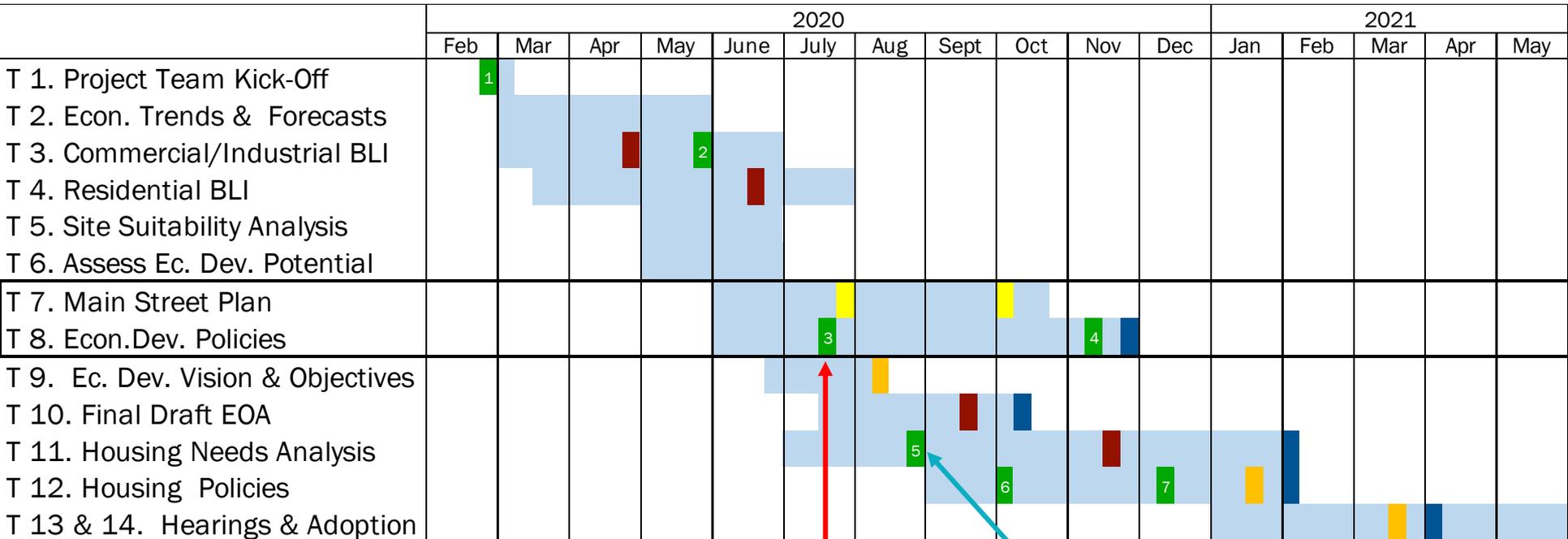
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Today's Focus: Philomath's Economic Opportunities Analysis and Economic Development Policies

- Review Preliminary Results: Commercial and Industrial Land Sufficiency Analysis
- Discuss Preliminary Target Industries and Required Site Types
- Discuss Philomath's Draft Economic Development Policies
- Next Steps

Overview of Project Schedule



PAC meeting 

Draft Product 

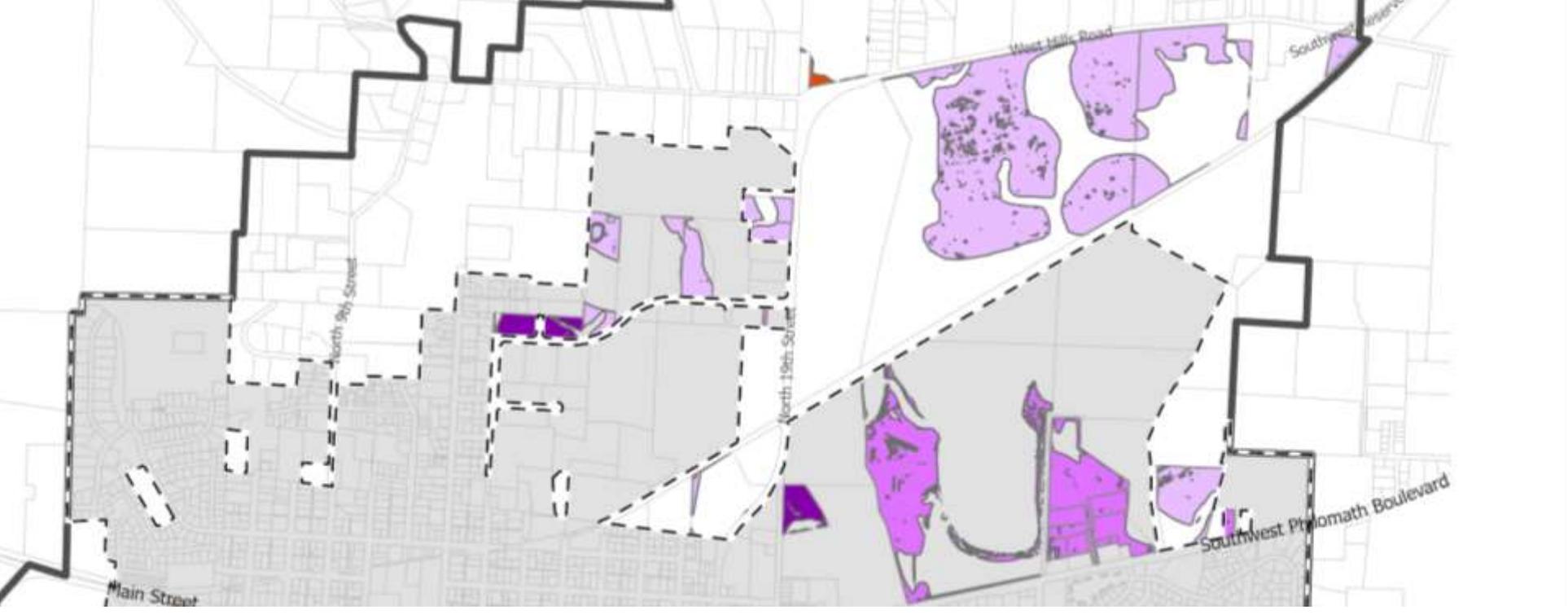
Joint PC/CC 

Final Product 

Main St Meetings 

We are here

Next meeting:
Switch to housing topics



Preliminary Employment Land Sufficiency Results

Recap: Employment Forecast Assumptions

- Employment base
- Growth rates
- Mix of employment
- Employment in residential areas
- Employment density

Please note: The numbers in the employment forecast are subject to change, with refinement of the EOA.

Employment Forecast

Year	Jobs grow at the rate of...	
	Population growth for the City (1.53%)	Employment growth in the region (0.69%)
2021	1,714	1,714
2041	2,320	1,968
Change 2021 to 2041		
Employees	606	254
Percent	35%	15%
AAGR	1.53%	0.69%

We tested 2
employment
growth
assumptions



Note: This analysis begins with an employment base of 1,904 employees. It then accounts for COVID-19 related employment losses between 2018 and 2021, by reducing the employment base by 10%. ECONorthwest will continue to monitor unemployment throughout the project—modifying this assumption as needed.

New Employment Mix by Land Use Type

Option A: If we assume employment grows at a rate consistent with the region's employment forecast (0.69%):

Land Use Type	2021		2041		Change 2021 to 2041
	Employment	% of Total	Employment	% of Total	
Industrial	462	27%	529	27%	67
Retail Commercial	149	9%	173	9%	24
Office & Commercial Services	857	50%	984	50%	127
Government	246	14%	282	14%	36
Total	1,714	100%	1,968	100%	254

Option B: If we assume employment grows at a rate consistent with Philomath's population forecast (1.53%):

Land Use Type	2021		2041		Change 2021 to 2041
	Employment	% of Total	Employment	% of Total	
Industrial	462	27%	624	27%	162
Retail Commercial	149	9%	203	9%	54
Office & Commercial Services	857	50%	1,160	50%	303
Government	246	14%	333	14%	87
Total	1,714	100%	2,320	100%	606

Employment in Residential Areas

Option A: If we assume employment grows at a rate consistent with the region's employment forecast (0.69%):

Land Use Type	New Employment Growth	Emp. In Res. Designations	New Emp. on Vacant Land
Industrial	67	8	59
Retail Commercial	24	4	20
Office & Commercial Services	127	23	104
Total	218	35	183

Note: we also deducted government employment. These jobs are assumed to locate on public lands.

Option B: If we assume employment grows at a rate consistent with Philomath's population forecast (1.53%):

Land Use Type	New Employment Growth	Emp. In Res. Designations	New Emp. on Vacant Land
Industrial	162	19	143
Retail Commercial	54	10	44
Office & Commercial Services	303	55	248
Total	519	84	435

Employment Densities and Land Need

Option A: If we assume employment grows at a rate consistent with the region's employment forecast (0.69%):

Land Use Type	New Emp. on Vacant Land	Employees per Net Acre	Land Demand (Net Acres)	Land Demand (Gross Acres)
Industrial	59	10	6	6
Retail Commercial	20	20	1	1
Office & Commercial Services	104	20	5	7
Total	183	-	12	14

The conversation from net to gross acres accounts for land needed for rights of way. In Philomath, land in rights of way are:

Option B: If we assume employment grows at a rate consistent with Philomath's population forecast (1.53%):

Land Use Type	New Emp. on Vacant Land	Employees per Net Acre	Land Demand (Net Acres)	Land Demand (Gross Acres)
Industrial	143	10	14	15
Retail Commercial	44	20	2	3
Office & Commercial Services	248	20	12	16
Total	435	-	29	34

- Industrial: 6% of developed land
- Commercial: 23% of developed land

Employment Land Sufficiency

Option A: If we assume employment grows at a rate consistent with the region's employment forecast (0.69%):

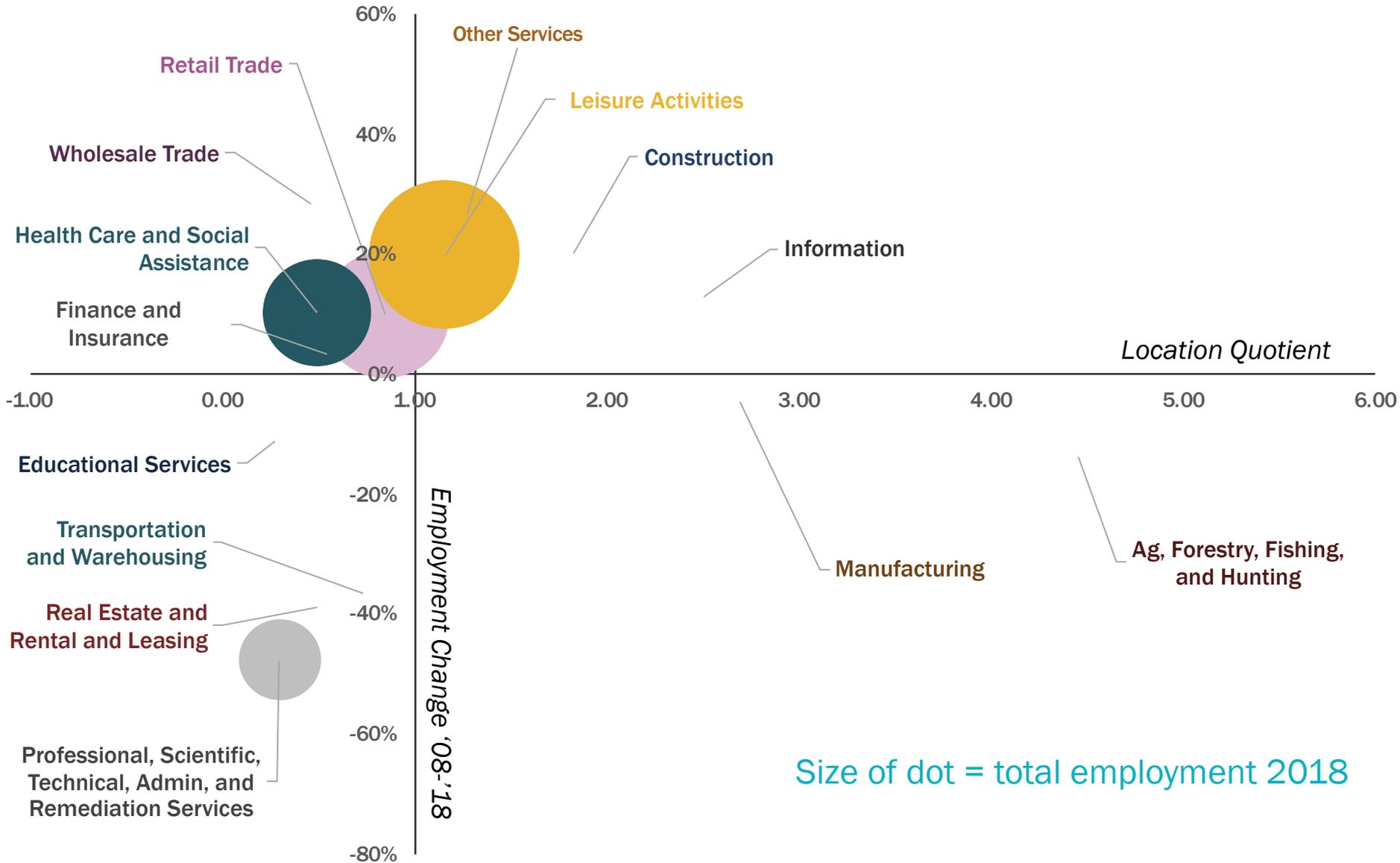
General Plan Designation	Land Supply (Suitable Gross Acres)	Land Demand (Gross Acres)	Land Sufficiency (Deficit, Gross Acres)	
Industrial	105	8	97	Surplus of land
Commercial (incl. Retail and Office)	13	9	4	

Option B: If we assume employment grows at a rate consistent with Philomath's population forecast (1.53%):

General Plan Designation	Land Supply (Suitable Gross Acres)	Land Demand (Gross Acres)	Land Sufficiency (Deficit, Gross Acres)	
Industrial	105	19	86	Surplus of industrial land
Commercial (incl. Retail and Office)	13	21	(8)	Deficit of commercial land

Preliminary Target Industries and Required Site Types

Target Industry Analysis



Potential Growth Industries

Examples of industries with the most potential for growth in Philomath?

- Manufacturing: small- to mid-scale manufacturing
 - Wood product and secondary manufacturing
 - Machinery manufacturing
 - Electronics and related manufacturing
 - Food and beverage manufacturing
- Construction
- Agriculture and forestry services
- Services for visitors and locals
 - Restaurants, local retail, and services for visitors
 - Health care and services for residents

Site Needs for Potential Growth Industries

Manufacturing industries

- Flat sites smaller than 2 acres up to sites of 25 acres
- Easy access to Highway 20; no freight movement through neighborhoods
- Some may need greater access to water and wastewater

Service for visitors and locals

- Sites smaller than 1 ac up to 3 ac; spaces in existing buildings
- High visibility location near other businesses and neighborhoods

Draft Economic Development Policies

Categories of Policies

1. Land Supply
2. Infrastructure Planning
3. Development, Infill Development, and Redevelopment
4. Existing Business Retention, New Business Development, and Attraction of New Businesses
5. Workforce Development

- Finalize draft Economic Opportunities Analysis
- Refine draft economic development policies
- Continue to work on Housing Needs Analysis and residential Buildable Lands Inventory

Next Project Meeting: July 28 @ 7p

- Topic: Main Street Plan (Stakeholder Meeting #1)

Next PAC Meeting: date to be determined

- Topic: Housing Needs Analysis

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