

Comprehensive Plan (*Plan*) Update 2036:
Land Capacity Analysis

Draft Employment Capacity Analysis

SAN JUAN COUNTY
PLANNING COMMISSION JANUARY 17, 2020
DEPARTMENT OF COMMUNITY DEVELOPMENT
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Will help answer the question:

Is there sufficient commercial and industrial land capacity to accommodate the forecast of 2036 population and jobs?

Note: Throughout this presentation, "commercial capacity" refers to both commercial and industrial land capacity.

Purpose

Provide an overview of the results of the Employment Capacity Analysis (ECA).

Presentation Overview

- Background about the Land Capacity Analysis and ECA
- Summarize ECA results
- What's next

Background

Land Capacity Analysis (LCA)

More information is posted at: <https://www.sanjuanco.com/1306/Comprehensive-Plan-Elements>

- The LCA is required by the Growth Management Act.
- It requires us to determine whether our land use designations can accommodate our 2036 population and employment forecast.
- To do that, we looked at and reported to you the amount of future development possible based on:
 - existing development, and
 - current densities and regulations.

Background

Employment Capacity Analysis (ECA)

More information is posted at: <https://www.sanjuanco.com/1306/Comprehensive-Plan-Elements>

- The ECA is the final component of the LCA.
- In the LCA, Commercial/Industrial capacity for development on developable land is shown as building square footage.
- The ECA is required to compare commercial capacity, projected population, and future employment.

Background

Draft Employment Capacity Analysis (ECA)

- The draft Employment Capacity Methodology established five steps for comparing forecasted population growth to commercial land capacity.
- The methodology was presented in 2019.
- No substantive comments were received.
- Staff performed the ECA.

Five Steps in the ECA

- Step 1: Calculate the ratio of 2016 jobs to 2016 households
- Step 2: Forecast new jobs in 2036
- Step 3: Calculate the ratio of existing jobs to existing building square footage
- Step 4: Calculate how many jobs can be accommodated in forecasted commercial capacity in building square footage
- Step 5: Determine if there is a future employment capacity (jobs) surplus or deficit

Draft ECA Results

KEY NUMBERS FROM THE EMPLOYMENT CAPACITY ANALYSIS

One Caveat:

- This analysis provides general information about developable land and employment capacity.
- It does not address capacity for specific types of uses or developments.
- For example, it does not show how much land capacity is specifically available for employment in the healthcare field. It only shows general employment capacity.

Forecasted Jobs (see Steps 1 and 2)

CCD	Total Forecasted 2036 Jobs	2017 Existing Jobs	Forecasted New Jobs, 2036
San Juan without Friday Harbor	822	787	35
Friday Harbor	3,042	2,149	893
Lopez	742	646	96
Orcas	2,095	1,753	342
Total	6,701	5,335	1,366

Source: January 6, 2020 staff report, Attachment A, Table 35

2036 New Jobs Forecast

UGA Allocation

January 6, 2020 staff report, Attachment A, Table 36.

Table 3. Job Growth Allocation for Eastsound and Lopez Village UGAs.

Island	Total 2036 New Jobs in CCD	Fifty Percent of 2036 New Jobs Allocated to the UGA
Orcas (Eastsound UGA)	342	171
Lopez (Lopez Village UGA)	96	48

Source: January 6, 2020 staff report, Attachment A, Table 36.

Area	2036 Job Capacity in New Jobs (Steps 3 & 4)	2036 New Jobs Forecast (Steps 1 & 2)	2036 Job Capacity +/-
San Juan CCD without Friday Harbor	2,787	35	2,745
Lopez CCD, Non-UGA*	9,166.8	48	9,118.8
Orcas CCD, Non-UGA	427.7	171	256.7

Source: January 6, 2020 staff report, Attachment A, Table 39
*Note: this includes the substantial RGU area on Decatur Island.

Scenario	2036 Job Capacity in Possible New Jobs	2036 New Jobs Forecast	2036 Job Capacity +/-
Scenario A Mixed-Use 100% Commercial	5,561.1	48	5,513.1
Scenario B 50/50% Commercial and Residential	2,780.5	48	2,732.5
Scenario C 100% Residential	0	48	-48

Scenario	2036 Job Capacity in Possible New Jobs	2036 New Jobs Forecast	2036 Job Capacity +/-
Scenario A Mixed-Use 100% Commercial	1,119.3	171	948.3
Scenario B 50/50% Commercial and Residential	603.4	171	432.4
Scenario C 100% Residential	487.6	171	316.6

Source: January 6, 2020 staff report, Attachment A, Table 39

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Summary

Overall, the ECA results indicate that there is sufficient land capacity in building square footage in existing commercial and industrial land use designations to accommodate the forecasted job growth through 2036.

What's Next?

- Brief County Council on January 27.
- Discuss urban land use issues in February.
- Discuss rural and resource land use issues in March.

General *Plan* Update Comments

Send public comments to compplancomments@sanjuanco.com

Staff reports are posted under the 'Land Capacity Analysis' tab at <https://www.sanjuanco.com/1306/Comprehensive-Plan-Elements>

Questions?

Employment Capacity Unincorporated San Juan CCD

Land Use Designation	Future Employment Capacity in Jobs
Rural General Use	1,642.6
Master Planned Resort	1,144.8
Total	2,787.5

Source: January 6, 2020 staff report, Attachment A, Table 38.A

Employment Capacity Lopez CCD outside UGA

Land Use Designation	Future Employment Capacity in Jobs
Rural General Use	8,683.7
Rural Industrial	24.2
Marine Center	112.9
Island Center	345.9
Subtotal	9,166.8

Source: January 6, 2020 staff report, Attachment A, Table 38.B

Employment Capacity Lopez Village UGA

Land Use Designation	Future Employment Capacity in Jobs
Scenario A (100% commercial)	5,561.1
Scenario B (50/50 commercial and residential)	2,780.5
Scenario C (100% residential)	0

Source: January 6, 2020 staff report, Attachment A, Table 38.B

Employment Capacity Orcas CCD outside UGA

Land Use Designation	Future Employment Capacity in Jobs
Rural Industrial	32
Island Center	76.9
Deer Harbor Hamlet Commercial	37.1
Deer Harbor Hamlet Industrial	41.9
Orcas Village Commercial	64.1
Master Planned Resort	4.4
Country Corner Commercial	0.9
Service Park	170.1
Subtotal	427.7

Source: January 6, 2020 staff report, Attachment A, Table 38.C

Employment Capacity Eastsound UGA

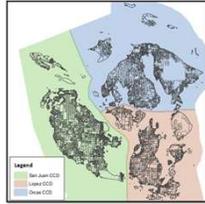
Land Use Designation	Future Employment Capacity in Jobs
Scenario A (100% commercial)	1,119.3
Scenario B (50/50% commercial and residential)	603.4
Scenario C (100% residential)	487.6

Source: January 6, 2020 staff report, Attachment A, Table 38.C

Note: Service and Light Industrial is not a mixed-use designation and provides capacity for 487.60 jobs

Data Sources

- U.S. Census Bureau *On the Map* web application
 - Uses several U.S. Census Bureau data sets
 - Provides jobs information from 2002 to 2017
- County adopted 2036 Population Forecast
- Draft Land Capacity Analysis Report



Map of U.S. Census County Divisions (CCD) in San Juan County
