



Memorandum

DATE: July 25, 2007

TO: Shoreline Planning Commission

FROM: Steven Cohn, Senior Planner

RE: Buildable Lands Update

At your next meeting, staff will present a summary of a recently completed Buildable Lands Analysis for Shoreline. The report is an update of the work done in 2002. In preparing the report, staff identified vacant and redevelopable sites, and using recent development trends, estimated a 20-year development capacity reported in terms of households and jobs. A summary of information in the report will be distributed at the meeting.

In addition to discussing Shoreline's analysis, staff will also present draft findings for King County as a whole. These findings, summarized in the next several pages, were presented to the King County Growth Management Hearings Board in June, and are currently being circulated to stakeholder groups throughout the County.

BACKGROUND AND OVERVIEW OF METHODOLOGY

(from a June 20 memo from Chandler Felt and Michael Hubner to the King County Growth Management Planning Council)

In 1997, the Washington State legislature adopted the Buildable Lands amendment to the Growth Management Act (RCW 36.70A.215), requiring a review and evaluation program to be implemented in six counties (King, Snohomish, Pierce, Thurston, Kitsap, and Clark). The purpose of Buildable Lands is to measure capacity to absorb growth, and to evaluate the effectiveness of local plans. This is achieved through a determination of the amount of land suitable for urban development and its capacity for housing and jobs, based upon observed development patterns and trends.

Where capacity is found to be insufficient to accommodate planned growth, the county or cities must adopt measures that are reasonably likely to address inconsistencies between actual and planned development and to provide sufficient capacity for housing and jobs. Such “reasonable measures” may include amendments to comprehensive plans and development regulations, public investments to support urban development, or other actions. Annual monitoring is required to assess the effectiveness of any measures adopted.

King County and the other five counties must submit a comprehensive Buildable Lands evaluation report to the State every five years. The first report was due September 1, 2002. The second five-year Buildable Lands Report (BLR) is due to the State on September 1, 2007. It will contain data on residential and commercial land development activity in King County’s 40 jurisdictions during the years 2001 through 2005. It also will contain a new, reliable inventory of land supply (in acres) and land capacity (in housing units, building square feet and jobs) to accommodate targeted growth through 2022. This information will supplement and extend the data in our first Buildable Lands Evaluation Report of 2002.

Buildable Lands implementation in King County is a collaborative effort of all 40 jurisdictions. It consists primarily of coordination among relatively independent local efforts, achieved through:

- Technical assistance and project coordination provided by Suburban Cities Association staff in partnership with King County
- Technical guidelines for local data collection and analysis, based on State Buildable Lands Program Guidelines (CTED 2000) and the recommendations of the King County Land Capacity Task Force (GMPC 1995, 1997)
- Use of standardized worksheets and templates to collect and analyze data
- Technical forums and other meetings to coordinate Buildable Lands data collection among jurisdictions
- Collaboration of staff from all four caucuses on countywide methodologies, overall review and evaluation framework, and contents of the report

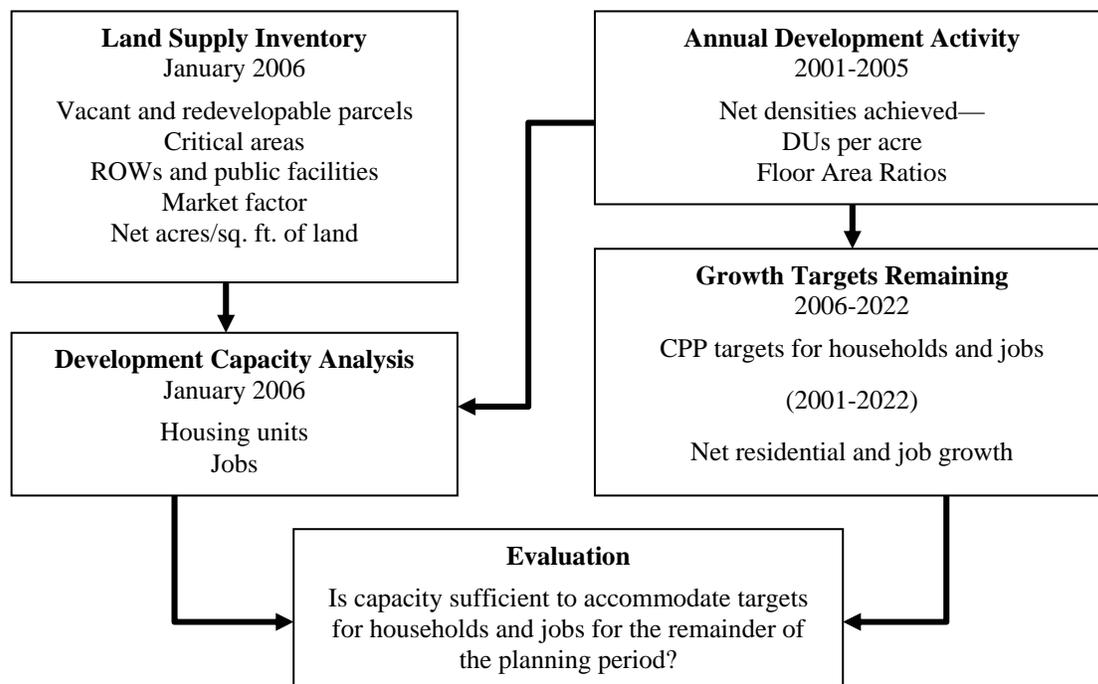
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The Buildable Lands Report incorporates the results of several related technical elements, including:

- Analysis of subdivision plat and building permit data for the years 2001-2005
- Analysis of parcel and critical areas data using geographic information systems to estimate the acres of vacant and redevelopable land within zoning designations as of early 2006
- Conversion of the land supply data to units of capacity (housing units, jobs), based on analysis assumptions for land dedications, market availability, densities, and other factors
- Evaluation of the sufficiency of the capacity for housing and jobs to accommodate growth needs for the remainder of the planning period (2006-2022).

The flowchart below illustrates the relationship among these technical elements within the entire data collection, analysis, and evaluation process.

Elements of Buildable Lands Analysis and Evaluation



Overall, the technical framework for the 2007 Buildable Lands Report is consistent with that used in the 2002 report. New and updated elements of the methodology include the following:

- Assumed future densities were updated based on actual densities achieved 2001-2005, which were generally higher than the densities used in the 2002 Buildable Lands analysis

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- Assumed land needs for rights-of-way and public purposes were updated based on observed development patterns 2001-2005, which generally resulted in higher discounts than used in the 2002 Buildable Lands analysis
- Analysis incorporates information on critical areas ordinance updates and other changes to local regulations adopted since 2002
- Assumed residential vacancy rates were used to convert housing units to households.

SUMMARY OF PRELIMINARY FINDINGS FOR KING COUNTY

RESIDENTIAL GROWTH

The data reflect residential building permits issued 2001-2005. Major findings include:

- King County gained more than 49,000 net new housing units in the UGA during the second five-year review period (2001-2005). Accounting for vacancy rates, this translates into about 47,300 net new households in Urban-designated King County, which is about 31% of the 22-year Household Growth Target added in 23% of the planning period.
- During this five-year period, population grew by more than 90,000 persons, or more than 29% of the population forecast for the planning period (2001-2022).
- Overall residential permitting in each subarea is also ahead of pace to reach targeted growth levels by 2022.
- Approximately half of all permitted units UGA-wide were multifamily units.
- Overall residential permitting has increased from 46,500 in the 1996-2000 period to 51,500 in the 2001-2005 period. Residential growth in the most recent period was evenly spread between SeaShore, East County, and South County subareas.
- Single-family permitting has increased from 19,500 units for 1996-2000 to over 26,000 units in the 2001-2005 period. Most of that increase happened in the East and South County subareas, which made up 80% of the single-family units permitted 2001-2005.
- Countywide, the over 25,000 permitted multifamily units represents a modest drop from multifamily figures for 1996-2000. However, new multifamily units had become more concentrated in SeaShore during the 2001-2005 period, compared to a more even distribution of multifamily permitting among the 3 large subareas prior to 2001. Attachments D and E contain more detailed data comparing residential permits for the two review periods.
- The majority of jurisdictions in the county are on or nearly on pace to attain their individual Household Growth Targets by 2022.

SINGLE-FAMILY RESIDENTIAL DENSITIES

- UGA-wide single-family densities have increased from 4.6 dus/ac during the 1996-2000 review period to 6.2 dus/ac in the more recent 5-year period. Densities have increased within each subarea as well, with the largest jump in East County.
- Gross densities are considerably lower than net achieved densities, reflecting the impact of constraints due to critical areas and land dedications for roads, stormwater, and open space (particularly in Urban Planned Developments and other planned unit developments with large open space tracts).

MULTIFAMILY RESIDENTIAL DENSITIES

- UGA-wide multifamily residential densities have increased from 22 dus/ac in the 1996-2000 review period to 38 dus/ac in the most recent 5-year period.
- SeaShore (the Seattle/Shoreline subarea) has seen the greatest amount of multifamily development (over 13,000 units) at the highest overall densities in the county (73 dus/ac). The largest proportion of this development occurred in Seattle.
- Densities have also increased in suburban areas, most dramatically in East County, which saw multifamily attain 33 dus/ac, a 65% increase from the previous 5 years.
- Among individual jurisdictions, Seattle, Bellevue, and Mercer Island led the county in multifamily densities, with averages greater than 70 dus/acre. Seattle, alone, issued permits for half of the multifamily units in the county. In suburban areas, Bellevue, Renton, Kirkland, Redmond, and unincorporated King County each permitted more than 1000 multifamily units during the 2001-2005 period. Attachment H contains data on multifamily development for cities and unincorporated areas.

COMMERCIAL AND INDUSTRIAL DEVELOPMENT

- King County lost more than 70,000 jobs during the recession of 2001 through 2004, and is only starting to gain those jobs back. As of the end of 2005, there were slightly fewer jobs in King County than at the beginning of the decade, and many individual jurisdictions have not fully regained pre-recession employment levels.
- Despite the recent recession, over 18 million square feet of commercial space was permitted in commercial and mixed-use zones countywide in the years 2001-2005, only slightly less than the 20 million commercial square feet permitted in the previous five years. Nearly half of the commercial square footage was permitted in the SeaShore subarea.
- Over 10 million square feet of space was permitted in industrial zones during the years 2001-2005, falling off to almost half of the 20 million square feet of industrial floor area added 1996-2000. Two-thirds of the new industrial square footage was permitted in South County.
- Overall commercial FAR increased from 0.47 in the 1996-2000 review period to 0.68 in the most recent five years, indicating more intensive use of commercial land. The

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most intensive development of commercial and industrial land occurred in SeaShore, with an achieved FAR of 2.12.

RESIDENTIAL LAND SUPPLY

- The Urban area of King County contains almost 22,000 net acres of vacant or potentially redevelopable residential land. More than half of this total is in South County. This land supply is approximately 5,000 acres less than the residential land supply reported in the 2002 Buildable Lands Report.
- Overall, approximately 50% of the gross acreage was deducted for critical areas, ROWs, public uses, and the market availability factor.
- 25% of the land supply in single-family zones is encumbered by critical areas; 10% of the land in multifamily and mixed-use zones is rendered unbuildable in this analysis due to critical areas.

RESIDENTIAL CAPACITY VS. GROWTH TARGETS

- The King County UGA has capacity, based on current plans, for 290,000 additional housing units holding 278,000 new households—more than twice the capacity needed to accommodate the remainder of the 2000-2022 growth target (nearly 105,000 hhlds).
- At projected household sizes, the 290,000 new housing units, together with the existing housing stock in 2006, could accommodate more than 400,000 additional persons within the Urban Growth Area (UGA). This is more than twice the population growth needed to meet the 2022 state forecast of 2,048,000 people.
- The residential capacity as of 2006 is slightly greater than the 263,000 housing unit capacity reported in the 2002 Buildable Lands Report, despite the consumption of more than 6,500 net acres of residential land in the last 5 years. The increase in capacity reflects greater residential densities achieved and expected in future years, the impact of higher land values on the number of parcels deemed redevelopable, and other updated analysis assumptions.
- Capacity for housing/households within each subarea is more than sufficient to accommodate the cumulative remaining Household Growth Targets for jurisdictions in those areas.
- Just over half of the housing capacity is located in the SeaShore subarea..
- The capacity includes room for more than 84,000 units in single-family zones, 1/3 of the total, and 205,000 units in multifamily and mixed-use zones, 2/3 of total residential potential.
- Approximately 30% of the housing capacity UGA-wide is on vacant land, 70% on redevelopable land (including SF-zoned parcels with subdivision potential and underutilized parcels in MF zones). Attachment L shows the percentages of vacant and redevelopable land and capacity for housing within the UGA.

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- Preliminary findings at the jurisdiction level indicate that all cities and unincorporated areas have sufficient capacity to accommodate their Household Growth Targets for the remainder of the planning period. Attachment J contains data on capacity and targets for each city and urban unincorporated subarea.

COMMERCIAL AND INDUSTRIAL LAND SUPPLY

- The land supply for commercial and industrial development covers nearly 6,300 net acres.
- South County contains the biggest share of developable non-residential land—half of commercial and mixed-use land, two-thirds of industrial land in the UGA.
- Approximately 15% of the gross developable land in non-residential zones is encumbered by critical areas and their buffers. Future land needs for rights-of-way and other on-site public uses is minimal in commercial and industrial development.

EMPLOYMENT CAPACITY VS. GROWTH TARGETS

- King County has the capacity for more than 500,000 more jobs within the Urban Growth Area – well above the overall 2000-2022 target of about 289,000 jobs.
- The total capacity is about 100,000 jobs less than the capacity of over 600,000 jobs estimated in the 2002 Buildable Lands Report. The difference reflects changes in analysis assumptions as well as the fact that some vacant and redevelopable site were developed between 2001 and 2006.
- About 80% of the total capacity is on land zoned for commercial uses, including both commercial-only and mixed commercial-residential zoning. Industrial capacity represents about 20% of the county’s potential job capacity.
- More than half of the county’s total employment capacity is in the SeaShore sub-area. Seashore and East County contain the majority of commercial/mixed-use capacity, while SeaShore and South County lead the county in industrial capacity.
- Approximately 40% of the job capacity UGA-wide is on vacant land, 60% on redevelopable land (including underutilized parcels zoned for commercial and industrial uses).
- Preliminary findings suggest that nearly all jurisdictions with Job Growth Targets have sufficient capacity to accommodate them within the 2001-2022 planning period.