

Medford Commercial & Industrial Land Study Goal 9 Supplement

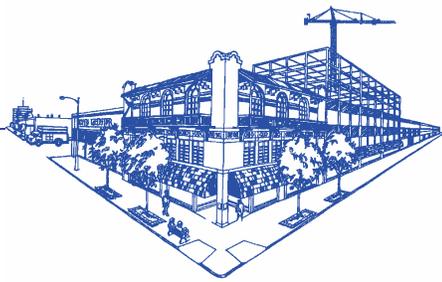
Prepared for:

City of Medford

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& Company**

Economic and Development Services



Medford Commercial & Industrial Land Study Goal 9 Supplement

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AT-A-GLANCE SUMMARY

The *Medford Economic Analysis* completed for the City of Medford in March 2003 was intended to address the community's economic development prospects currently and over a longer 20-year planning horizon. This supplemental Goal 9 analysis builds on the initial economic analysis and is focused on a) refinements to a commercial/industrial land inventory; b) selection of an appropriate employment growth and land needs forecast; and c) identification of siting criteria that can be considered modifications to Medford's Comprehensive Plan.

What follows is an *at-a-glance* summary of findings and recommendations resulting from this analysis.

Updated Commercial & Industrial Land Inventory. In cooperation with City of Medford planning and economic development, five land use inventory iterations were conducted starting with the 2003 economic market analysis. An approach was selected that includes all identified industrial and commercial vacant lands including sites of less than one acre, adds downtown and redevelopment sites, excludes only those portions of sites that are environmentally constrained, and provides manual parcel data review to adjust environmental constraints. The *recommended inventory* identifies an estimated 350 acres of vacant and redevelopable commercial land together with almost 1,288 acres of industrial land – for a combined developable commercial/industrial land inventory of approximately 1,638 acres.

Future Economic Outcomes. Using a recommended land demand scenario predicated on a *changing share* methodology assuming some continued shift from industrial to commercial use, demand for commercial land is projected at 650 acres over a 20-year period with demand for industrial projected at 844 acres – for a combined commercial/industrial land need of 1,494 acres.

A *comparison of land demand (or need) with supply* indicates that Medford could require designation of up to 300 added acres of commercial land while at the same time being oversupplied with industrial sites in the amount of an estimated 444 acres. Taken together, there appears to be an *adequate inventory* of commercial and industrial land, although redesignation of some industrial sites to commercial may be warranted – potentially leaving a reserve of nearly 144 acres. This reserve could be offset by redesignating some commercial/industrial lands to other uses and/or swapping commercial/industrial lands with other land designations.

Siting Criteria. This report outlines criteria that could be considered for siting of future anticipated industrial and commercial uses in the City of Medford plus the as-yet unincorporated Urban Growth Boundary (UGB). As described in this report, a *matrix format* is suggested, illustrative uses by General Land Use Plan (GLUP) designation together with potentially relevant criteria pertaining to location and access, valuation and property sizing/parcelization.

Next Steps. Based on the analysis and findings of this study, the following *next steps* are recommended for discussion with the City of Medford Planning Commission and City Council:

- Adoption of the commercial/industrial inventory and land demand/needs forecast recommended with this report as a basis for Goal 9 compliance and future land use designations.
- Acceptance of recommended siting criteria as a *working guide* to redesignation of industrial and commercial GLUP and zoning classifications.
- Matching appropriate revised GLUP/zoning designations to existing uses, followed by mapping for prospective uses including new development and redevelopment.

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I. INTRODUCTION

The economic and development consulting firm E.D. Hovee & Company has been retained by the City of Medford, Oregon, to assess Medford's future economic potential, identify commercial and industrial lands available to serve Medford's long-term economic needs, and provide recommendations on siting future commercial and industrial activities. The study builds upon the *Medford Economic Market Analysis* completed in 2003.

BACKGROUND

In March 2003, E. D. Hovee & Company completed the *Medford Economic Market Analysis*. This report provided an evaluation of employment growth and the resulting need for commercial and industrial lands over the next 20 years. Also recommended was consideration of changes to comprehensive plan and zoning regulations as appropriate to implement a preferred economic development strategy.

Subsequently, the Planning Commission has identified issues for economic development and recommended courses of action by inter-office memorandum to the City Council dated February 25, 2004. Included with the Planning Commission's report were recommendations to:

- Consider designation of added commercial land – but to a “very limited extent” for the immediate future.
- Increase minimum lot sizes in the industrial zones.
- Develop additional standards to identify when commercial uses can occur in industrial zones.
- Maintain land in the Heavy Industrial zone, subject to a target industry analysis to better determine the size, type and appropriate locations needed for land in each use category.

The Medford City Council concurred with these recommendations – as a basis for proceeding with subsequent economic and planning analysis. Based on recommendations of the economic market analysis and subsequent Planning Commission and City Council reviews, the City of Medford retained E. D. Hovee & Company to prepare a more refined Goal 9/Target Industry Analysis.

The first and primary purpose of this supplemental analysis is to refine the commercial and industrial lands inventory. This inventory is then compared with projected employment growth and associated land demand consistent with Goal 9 requirements of the state of Oregon Department of Land Conservation and Development (DLCD). A secondary purpose of this supplemental analysis is to identify and describe siting or locational criteria that could be considered for future designation of commercial and industrial lands.

APPROACH

E.D. Hovee & Company has taken a *four-step* approach in assisting the City of Medford in addressing each of the Planning Commission recommendations:

- Update of earlier commercial and industrial lands inventory with the aid of City GIS files and prior inventory work.
- Presentation of three economic opportunity forecasts completed in the 2003 Medford Economic Market Analysis followed by staff/consultant recommendation of a preferred scenario that appears to best fit with Medford's long-term economic opportunities and policy objectives.
- Preliminary assessment of potential siting criteria that could be applied to future modifications to Medford's Comprehensive Plan, land use designations and associated land development code.
- Outline of summary findings and recommendations for consideration by the Medford Planning Commission and City Council.

A preliminary draft of this report was submitted for review by City of Medford Economic Development and Planning personnel in October 2004. This final report is based on that review with minor editorial revisions for clarity. Staff participation in provision of data and review of working drafts of this analysis is gratefully acknowledged.

QUALIFICATIONS & LIMITATIONS

This analysis has been prepared by E. D. Hovee & Company as project consultant. A brief profile of the consultant is attached as an appendix to this report.

This supplemental analysis is based on information generally deemed to be reliable. However, accuracy of information from third party sources is not guaranteed and is subject to change without notice.

Actual conditions may well vary from estimates due to local economic conditions, local/non-local policy decisions, and exogenous market dynamics. Consequently, the general conclusions drawn from this analysis should be viewed as being of greater significance than the point reliability of specific numerical estimates.

The conclusions and opinions expressed in this report are those of the authors. They should not be construed as representing the opinion of any other party without prior express approval – whether in whole or part.

REPORT ORGANIZATION

The remainder of this report is organized to summarize the results of the four-step approach within the following main topics:

Updated Commercial & Industrial Land Inventory
 Future Economic Outcomes
 Siting Criteria
 Findings & Recommendations

II. UPDATED COMMERCIAL & INDUSTRIAL LAND INVENTORY

As the first major task with this supplemental analysis, E.D. Hovee & Company completed a revised commercial and industrial lands inventory for the Medford UGA. This inventory and analysis has proved to be a substantial undertaking involving coordination with City staff to obtain current GIS base data and then review assumptions appropriate for inclusion or exclusion of lands as part of a developable inventory. As is described in this section of the report, a total of five inventory iterations have been conducted starting with the 2003 economic market analysis.

This inventory update is compared with the prior inventory completed in June along with an updated table that contains Medford City Planning staff's 2003 inventory and the earlier E.D. Hovee & Company's 2002 inventory. This discussion describes methodologies that have been considered, comparative results and a recommended land inventory.

METHODOLOGIES

E.D. Hovee & Company obtained GIS files from the City of Medford's Planning Department. GIS shape files have covered data items including:

- City Limits
- Urban Growth Boundary (UGB)
- Roads/Streets
- Zoning
- Tax Lots (entire UGB)
- Environmental Constraints
- General Land Use Plan (GLUP) Designations

The tax lot file was augmented to include zoning, GLUP (or Comp Plan) designations, vacant/developed status, and site size classifications by property record. Properties are classified by zoning district and GLUP designation according to the center of the property. For example, if the center of a parcel falls within a light industrial zone, it is classified light industrial because the majority of the property lies within that designation. In effect, this method makes no attempt to split or allocate properties that fall within multiple GLUP designations.

Private properties are designated vacant through a *two-step* process. The first step classifies a property as vacant if its improvement value is zero. The list is further refined by reviewing the assessor's property description. Properties are classified as developed if they are not designated as vacant, publicly owned, exempt, or with improvement value less than one-third of land value (consistent with the City of Medford Planning Department methodology). Each property is then assigned one of seven site size classifications:

- < 0.5 acres – sites less than 0.5 acres
- 0.5-1.0 acres – sites 0.5 to 0.99 acres
- 1.0-2.0 acres – sites 1.0 to 1.99 acres
- 2.0-5.0 acres – sites 2.0 to 4.99 acres
- 5.0-10.0 acres – sites 5.0 to 9.99 acres
- 10.0-15.0 acres – sites 10.0 to 14.99 acres
- 15+ acres – sites 15.0 acres or larger

In addition to the methodology described above, some differences are noted between the 2003 E.D. Hovee & Company inventory analysis and this 2004 update, as well as with Medford Planning Department's updated 2003 study. These differences are briefly discussed below.

2003 E.D. Hovee & Company Market Study. Based on previous Medford Planning staff studies, E.D. Hovee & Company did not consider redevelopment potential of underutilized sites as part of its 2003 market study. All vacant sites including those with environmental constraints were considered with the initial inventory. *Note:* This is denoted on the following table as the EDH 03A inventory.

As a second step to the evaluation, sites with potential environmental constraints were also considered separately. At the time of the 2003 report, the Medford Planning Department had not fully delineated environmental constraint boundaries so that entire sites with some level of environmental constraints were excluded from the potentially developable inventory (shown as the EDH 03B inventory).

2003 Medford Planning Staff Study. During mid-2003, the City of Medford's Planning staff conducted an independent evaluation of Medford's commercial and industrial lands. At this time, Planning staff incorporated their newly completed environmental constraint delineations as well as inclusion of potential redevelopment sites.

The City of Medford adopted an inventory of riparian areas and wetlands in late Spring 2003. Geographic areas within the 100-year flood plain as well as the riparian and wetland areas were removed from their inventory. Planning staff also determined that parcels are underutilized (or redevelopable) if they have an improvement value that is less than one-third of the land value. Medford Planning staff excluded parcels less than one acre in size and properties located within the downtown (or CC) area. *Note:* this is shown on the table as the MPS 03 inventory.

2004 E.D. Hovee & Company Update. This inventory update utilizes the previous methodology employed in the 2003 study with two significant refinements. The 2004 update utilizes Medford Planning staff's environmental delineations to remove environmentally constrained areas within each parcel (as a proportion of the parcel rather than the entire parcel). Based upon consultation with City Planning staff, this revised inventory does rely upon additional manual inspection – which is the primary reason for the increased developable land inventory estimates.

The 2004 study also employs Medford Planning staff's underutilization methodology to identify properties with high redevelopment potential. As with the 2003 study, this evaluation considers properties of less than one acre in size as well as sites located in Downtown Medford. *Note:* This is depicted on the following table as the EDH 04 inventory.

Summary Methodology Comparison. The differences in methodology between the separate inventories conducted are visually depicted by the following table.

Figure 1. Industrial & Commercial Land Inventory Methodology Comparison

Methodology	Industrial & Commercial Property			
	EDH 03A	EDH 03B	MPS 03	EDH 04
Includes vacant lands	●	●	●	●
Includes sites of less than 1 acre	●	●		●
Adds downtown sites	●	●		●
Adds redevelopment sites			●	●
Excludes entire site if portion is environmentally constrained		●		
Excludes only the portion of the site constrained			●	●
Parcel size information provided	●	●		●
Manual parcel data review to adjust environmental constraints				●

Note: EDH 03A refers to 2003 industrial land inventory with *Medford Economic Market Analysis*, before exclusion of land with environmental constraints. EDH 03B refers to the same inventory, but after deletion of parcels with environmental constraints. MPS 03 is the City of Medford Planning staff's inventory. EDH 04 is based on the current updated land inventory methodology and results are outlined by this memorandum.

Source: City of Medford Planning and E. D. Hovee & Company.

In summary, the current methodology (EDH 04) represents a composite of the best features of earlier inventories – based on new information as it has been compiled. This updated inventory procedure is intended to provide a more reliable estimate of vacant and redevelopable industrial and commercial land potentially suitable for industrial and commercial development in the City of Medford and associated Urban Growth Boundary (UGB).

COMPARATIVE RESULTS

To illustrate the effect of the manual site by site inspection, two inventories were eventually completed as part of this 2004 update. The initial inventory (denoted as EDH 04A) relied primarily on computerized information to develop estimates of vacant and underutilized commercial and industrial lands.

The second (or refined) inventory (indicated as EDH 04B) entailed a manual site by site review of each identified environmentally constrained parcel. This revision produces added developable land inventory, especially acreage within the 15+ acre category.

The revised inventory contains 350 more acres of industrial land and 90 added acres of commercial land. Eighty-five percent of the increase in industrial acreage is captured by parcels of 15 acres or greater. Parcels 15 acres or larger account for the majority (53%) of the increase in commercial land.

Figure 2. Comparative Results of the 2004 Industrial & Commercial Inventory Analysis

Parcel Size	Industrial		Commercial	
	EDH 04A	EDH 04B	EDH 04A	EDH 04B
< 0.50 acres	30.57	33.84	43.49	45.75
0.5-0.99 acres	93.45	101.82	39.81	43.50
1.0-1.99 acres	66.66	73.49	45.79	52.80
2.0-4.99 acres	134.95	157.43	54.04	64.05
5.0-9.99 acres	57.48	70.27	51.55	57.64
10.0-14.99 acres	93.19	93.19	11.02	23.49
15+ acres	462.48	757.73	15.82	62.48
All Vacant Parcels	938.78	1,287.77	261.52	349.71

Note: Inventory includes all vacant and underutilized properties with portions of parcels that are environmentally constrained removed from the inventory. "A" indicates the initial June 18th inventory and "B" denotes the refined July 22nd inventory.

Source: E.D. Hovee & Company using City of Medford Planning Department data and GIS files.

Each of the three studies (i.e., EDH 2003, Medford Planning 2003, and revised EDH 2004) produces different land supply estimates, reflective of their different methodologies. The earlier 2003 E.D. Hovee & Company economic market study identified 1,229.83 acres of vacant industrial land (including all vacant and environmentally constrained areas), compared to Medford Planning staff's 1,118.40 acres (including underutilized sites) and E.D. Hovee & Company's 2004 final updated estimate of 1,287.77 acres.

Perhaps the greatest methodological difference between Medford Planning staff's estimate and the E.D. Hovee & Company 2004 initial update was the inclusion of properties that are smaller than one acre in size and inclusion/exclusion of environmentally sensitive areas. *Note: The environmental inventory completed in 2003 assumed 50 foot buffers. Planning staff has been considering reducing the buffers to 25 feet, which could result in a further increase in the supply of industrial and commercial lands.*

The initial 2003 E.D. Hovee & Company study identified 447.50 acres of vacant commercial land (including all vacant environmentally constrained areas), compared to Medford Planning staff's 286.90 acres (including underutilized sites) and E.D. Hovee & Company's 2004 updated estimate of 349.71 acres. While Medford Planning staff's estimate and the E.D. Hovee & Company revised 2004 update are relatively similar, differences occur because the E.D. Hovee & Company inventory includes downtown together with vacant/underutilized properties smaller than one acre, and includes/excludes environmentally sensitive areas.

Figure 3. Comparative Results of Recommended Current vs. Earlier Inventories

Parcel Size	Industrial Property				Commercial Property			
	EDH 03A ¹	EDH 03B ²	MPS 03 ³	EDH 04B ⁴	EDH 03A ¹	EDH 03B ²	MPS 03 ³	EDH 04B ⁴
< 0.50 acres	23.66	20.43	NA	33.84	35.48	31.96	NA	45.75
0.5-0.99 acres	99.50	80.23	NA	101.82	25.29	19.59	NA	43.50
1.0-1.99 acres	78.54	41.86	NA	73.49	29.85	18.87	NA	52.80
2.0-4.99 acres	144.01	74.26	NA	157.43	56.54	45.69	NA	64.05
5.0-9.99 acres	99.44	53.17	NA	70.27	59.73	41.48	NA	57.64
10.0-14.99 acres	104.24	78.68	NA	93.19	34.66	0.00	NA	23.49
15+ acres	680.44	115.18	NA	757.73	205.95	15.82	NA	62.48
All Vacant Parcels	1,229.83	463.80	1,118.40	1,287.77	447.50	173.41	286.90	349.71

Notes: 1) The E.D. Hovee & Company 2003 study did not remove environmentally constrained portions of sites. Downtown commercial sites are included. Redevelopment sites were not considered. 2) This second estimate removed all environmentally constrained sites. Downtown commercial sites are included. Redevelopment sites were not considered. 3) Detailed parcel size information was not available, as GIS files specific to these results did not equate to published results. Downtown sites are omitted, but underutilized sites are included. 4) Inventory reflects the refined July 22nd estimates and includes all vacant and underutilized properties with portions of parcels that are environmentally constrained removed from the inventory.

Source: E.D. Hovee & Company using City of Medford Planning Department data and GIS files.

The approach of reducing the inventory only for the *portions of sites with environmental constraints* rather than for complete sites that may have some environmental constraint results in a larger potential inventory of developable sites. This is particularly the case for properties designated for industrial use under the GLUP. The updated inventory is also augmented by inclusion of redevelopment parcels.

RECOMMENDED INVENTORY

As indicated by the chart above, the final EDH 04B iteration is recommended as the inventory to be carried forward for Goal 9 economic needs analysis. This is the inventory that is compared with alternative projections of industrial and commercial land demand – a topic to which this report now turns.

III. FUTURE ECONOMIC OUTCOMES

E.D. Hovee & Company completed an economic forecast as part of the 2003 Economic Market Analysis. Three alternative job and land demand forecasts were presented as possible future outcomes for Medford. This section summarizes the alternatives presented in the 2003 study, discusses the applicability to more recent conditions, and examines the implications of Medford's commercial and industrial land supply.

ALTERNATIVE DEMAND FORECASTS

For the future, Medford is faced with several possible economic scenarios. The community's realized economic future will, in part, be determined by some combination of past economic trends, Medford's current industrial and commercial land inventory, regional and local competitive advantages, and local policy decisions.

Consequently, a series of alternative job and land demand forecasts were prepared for consideration by the City of Medford. The job target and land absorption outcomes that Medford actually realizes should reflect a realistic assessment of the community's current and prospective competitiveness and its vision for the future, followed by implementation of the vision.

Updated Market Conditions. The alternative economic forecasts presented in the 2003 study were predicated on market conditions through year 2000. Long-term employment growth averaged 3.6% (or 2,265) per year between 1970 and 2000.

The local economy slowed considerably between 2000 and 2002, with job growth dropping to annual growth of only 1.1% during this time period. However, this has not appreciably changed the long-term employment growth rate, which from 1970-2002 averages 3.4% annually.

Figure 4. Jackson County Historic Job Growth (1970-2002)

<u>Year</u>	<u>Jackson County</u>
Jobs:	
1970	36,133
1980	58,793
1990	76,441
2000	104,087
2002	106,355
AAGR:	
1970-80	5.0%
1980-90	2.7%
1990-00	3.1%
2000-02	1.1%
1970-00	3.6%
1970-02	3.4%

Note: AAGR denotes average annual growth rate. Jobs include full-time, part-time, and proprietors.

Source: U.S. Bureau of Economic Analysis.

Alternative Demand Forecasts. Three alternative demand scenarios were recommended for consideration by the City of Medford with the 2003 economic market study. Due to the fact that local conditions have not changed appreciably, the wide range of employment forecasts presented in 2003 all still represent possible outcomes:

- **Historic Growth Rate** – According to data collected from the U.S. Bureau of Economic Analysis (BEA), Jackson County’s job base has been growing at a *rate of 3.6% per year* between 1970 and 2000. Continuation on this trend would lead to the creation of 107,840 jobs, or a total employment base of 212,690 by 2020. Medford provides 36% of all Jackson County jobs. Given its regional role, it is reasonable to anticipate that Medford could continue to create 36% of Jackson County’s employment opportunities, and therefore, add *another 38,820 jobs*.
- **Historic Annual Job Creation** – Over the last 30 years, Jackson County has been producing an *average of 2,250 new jobs per year*. The Oregon Employment Department is projecting an annual employment growth rate of 1.6% over the next 10 years, leading to the addition of 1,960 jobs per year. Given the slow economy during the early part of this decade, it is reasonable to assume that job growth for the first 10 years will come closer to the State’s forecast. However, a longer-term average of 2,250 per year could still result from higher job growth in the later 10 years of the forecast period. The resulting effect for Medford would be *16,200 new jobs* over the next two decades – or a long-term average annual growth rate of 1.8%.

Figure 5. Projected Added Medford Jobs Based on Historic Trends (2000-2020)

	Historic Growth Rate	Historic Annual Job Creation
2000 IMPLAN Employment	104,845	104,845
Annual Growth Rate	3.6%	1.8%
2020 Employment	212,688	149,845
Employment Growth	107,843	45,000
Medford Share	36%	36%
Medford Added Jobs	38,823	16,200

Source: E.D. Hovee & Company using information obtained from Minnesota IMPLAN Group, U.S. Bureau of Economic Analysis (BEA), and Oregon Employment Department.

- **Regional Problem Solving Project** – Medford has been participating in a long-range strategic planning project with the Rogue Valley Council of Governments and other government agencies within Jackson County. The strategic plan in 2003 projected Medford to receive over 47,900 new people by 2050, or 19,400 added households based on Medford’s forecasted average household size of 2.47 persons per household. Planning participants targeted an average jobs-housing ratio of 1.5, which is coincidentally Medford’s current average. For Medford to maintain its current jobs-housing balance, it would need to create 29,100 new jobs over the next +/-50 years, or *12,945 added jobs* within the shorter time horizon of 2020. This equates to a much slower rate of job growth of less than 0.6% per year.

Figure 6. Projected Added Medford Jobs Based on Regional Problem Solving Project

	2020	2050
x2 Pop Growth	21,317	47,914
Average Household Size	2.47	2.47
Added Households	8,630	19,398
Jobs-Housing	1.50	1.50
Added Jobs	12,945	29,097

Source: E.D. Hovee & Company using information obtained from Rogue Valley Council of Governments, Minnesota IMPLAN Group, U.S. Census Bureau, U.S. Bureau of Economic Analysis (BEA), and Oregon Employment Department.

The three alternative forecast approaches indicate a range of possible outcomes – for an added 12,900, 16,200 or 38,800 jobs in Medford by 2020. Due to the recent economic slowdown and longer-term aging of the population, the higher number would not appear to be a most likely forecast. Conversely, the Regional Problem Solving estimate may prove unduly conservative particularly if the City of Medford continues to attract a younger and more diverse population mix. Consequently, for purposes of this Goal 9 supplemental analysis, *the forecast alternative of 16,200 added jobs in Medford is recommended* on a preliminary basis for industrial and commercial land needs projections.

Employment Mix. Selecting an appropriate jobs target constitutes the first step of the forecasting process. Allocating jobs to commercial and industrial land uses represents the second step in the job forecast process.

The specific employment opportunities available in the future will depend, in part, on the lands available for development. Three employment mix projections illustrate alternative focuses on job creation and resulting land utilization. Each assumes a 20-year Medford overall job target of an added 16,200 jobs.

- **Current Mix** – Assumes employment growth occurs on lands according to employment distributions examined in the 2003 study. For example, 21% of Medford’s employment is currently located on industrial land. Under this forecast scenario, commercial lands would accommodate 10,370 jobs, with 3,400 jobs allocated to industrial properties, and 2,430 to other lands (e.g., residential, agricultural, etc.).
- **Changing Share** – This forecast alternative presumes a focus on commercial development, assuming that Medford’s economy continues some transition toward a greater mix of commercial-related jobs, with a tightening of land use regulations that preserve industrial land for industrial-related jobs (i.e., manufacturing, distribution, wholesale, etc.). Allocations are consistent with growth trends observed over the last five years.
- **Industrial Land Focus** – Job creation on industrial properties would continue to occur at an annual rate of approximately 400 jobs per year. Commercial uses would still be permitted, but restricted to smaller, highly visible properties (parcels smaller than 5 acres). This forecast would result in a 50/50 mix of added jobs between commercial and industrial lands.

Figure 7. Medford Job Growth Allocations by Land Type

	Land Type			Total
	Com'l	Ind'l	Other	
20 Year Job Growth				16,200
Current Mix:				
Allocations	64%	21%	15%	100%
Added Jobs by Land Type	10,370	3,400	2,430	16,200
Changing Share:				
Allocations	75%	25%	0%	100%
Added Jobs by Land Type	12,150	4,050	0	16,200
Industrial Land Focus:				
Allocations	50%	50%	0%	100%
Added Jobs by Land Type	8,100	8,100	0	16,200

Source: E.D. Hovee & Company using information obtained from the City of Medford and Oregon Employment Department.

Each alternative employment mix forecast can be translated into a corresponding set of land demand projections. Current employment densities specific to commercial and industrial lands are assumed to continue into the future.

With these employment mix scenarios, projected 20-year demand (or need) for commercial land could range from 430 to 650 acres. Between 710 and 1,690 acres of industrial land could be required to meet future needs.

Specifically noted is that approximately 15% of the job allocation with the current mix scenario is to lands designated for uses other than industrial and commercial development – reflecting current development patterns. With this scenario, 13,770 jobs (or 85% of the employment forecast) would be allocated to industrial and commercial use. With the other two scenarios, 100% of projected employment growth is allocated to industrial and commercial lands.

Figure 8. Medford Employment Land Demand Forecasts (Commercial vs. Industrial)

	Land Type		Total
	Com'l	Ind'l	
Employment Density (Jobs per Acre)	18.7	4.8	
Current Mix:			
Job Growth (2000-2020)	10,370	3,400	13,770
Land Demand (Acres)	555	708	1,263
Changing Share:			
Job Growth (2000-2020)	12,150	4,050	16,200
Land Demand (Acres)	650	844	1,494
Industrial Land Focus:			
Job Growth (2000-2020)	8,100	8,100	16,200
Land Demand (Acres)	433	1,688	2,121

Source: E.D. Hovee & Company using information obtained from the City of Medford and Oregon Employment Department. Land needs are *based on use* rather than the designation of the land on which the employment actually occurs. To the extent that, for example, commercial use is encouraged or actually occurs on industrial land, the resulting zoning allocations between commercial/industrial could be shifted accordingly.

Total industrial and commercial land demand is minimized at 1,263 acres with the current mix – which assumes a continued pattern of some employment growth elsewhere, rather than industrial or commercial lands. Examples include schools, self-employed and expansion of otherwise non-conforming uses.

Total 20-year land need would be greatest at 2,121 acres with the industrial land focus. This assumes continued use of at least some industrial lands by commercial uses and/or much more active effort to increase industrial investment in the Medford area.

LAND DEMAND VS. SUPPLY

Medford may not have enough vacant commercial and industrial land to meet future market demand. Medford currently has 1,640 acres (both industrial and commercial) of vacant employment lands, but demand over the next 20 years could range from 1,263 to 2,121 acres. Consequently, Medford could experience a potential deficit of 481 acres to a surplus of as much as 377 acres.

Commercial. Medford currently has an extremely limited supply of commercial land. With only 350 acres of unconstrained vacant commercial property, Medford is likely to experience an 80-300 acre deficit through 2020. The lack of commercial property will increase market pressure to locate on industrial lands.

There is currently 210 acres of industrial land that is comprised of parcels less than 2.0 acres in size; and another 157.43 acres ranging 2.0-4.99 acres in size. Medford could rezone a portion of these smaller sites for commercial uses to alleviate market demands in existing commercial

areas. There is enough surplus vacant industrial land with the current mix and changing share scenarios to absorb the commercial deficit. However, if the city chooses to pursue an industrial land focus strategy, Medford will have to consider other means to balance commercial demands with available lands (e.g., more focused development in commercial nodes, much greater utilization of downtown sites, etc.).

Industrial. Industrial land comprises almost 80% of Medford’s vacant employment property. Depending on the economic development focus, Medford could have between a 400-acre deficit to a 580-acre surplus of industrial land. Surpluses occurring with the current mix and changing share scenarios could be applied to alleviate potential market pressures on commercial lands.

Figure 9. Land Demand/Supply with Alternative Forecasts

Employment Lands*	Current Mix	Changing Share	Industrial Land Focus
Commercial Lands:			
Land Supply (acres)	349.71	349.71	349.71
Land Demand (acres)	555.00	650.00	433.00
Surplus (+)/Deficit (-)	- 205.29	- 300.29	- 83.29
Industrial Lands:			
Land Supply (acres)	1,287.77	1,287.77	1,287.77
Land Demand (acres)	708.00	844.00	1,688.00
Surplus (+)/Deficit (-)	579.77	443.77	- 400.23

*Note: Includes the total of commercial and industrial lands. Land supply numbers are for unconstrained acreage per E.D. Hovee & Company July 22, 2004 memorandum.

Source: E.D. Hovee & Company.

Comparison with Other Forecasts. The results of this forecast process can be compared with two other forecasting processes that the City has used in recent years – the land absorption analysis method utilized by the Planning Department and the recent (June 2003) Medford Office Market Study conducted for the Medford Urban Renewal Agency by Bruce M. Ostly, Real Estate Consultant.

The City of Medford’s Planning Department has examined recent land absorption for commercially and industrially zoned lands. Planning Department officials estimate Medford needing 422 acres (or 21.11 acres per year) of commercial and 442 acres (or 22.11 acres per year) of industrially designated land to meet market demands over the next 20 years.

The City’s projection for commercial property comes closest to the E.D. Hovee & Company industrial land focus alternative, illustrating the need for additional commercial land to be designated (with any forecast scenario). However, a key difference in allocation methodology is that the City’s absorption data is organized by the zoning designation on which a development is located, while the E.D. Hovee forecast allocation is by the use of the new development. The E.D. Hovee alternatives include all commercial uses, while the City allocation is based on the type(s) of development actually occurring on commercially zoned land.

For industrial land, the E.D. Hovee & Company employment mix scenarios all exceed the City estimates of 20-year need for industrially designated land. In effect, the E. D. Hovee alternatives all reflect the potential for Medford to be positioned to capture industrial employment growth proportional to its current share of countywide industrial employment. A larger industrial land inventory also may prove helpful to maintain a price competitive supply of sites.

The Ostly report is focused primarily on land needs for commercial office space, particularly in the downtown Medford area. The Ostly analysis projects Jackson County employment growth to occur at a rate of 2.2% per year over the next ten years. This rate is twice the rate of growth that has occurred within the last two years and is half a percentage point greater than the job growth rate associated with the recommended forecast alternative in this study. However, Ostly projects downtown office demand over the next ten years to only require two city blocks, well within the downtown area inventory of sites identified with this study.

Recommended Land Demand Scenario. As noted, an overall jobs forecast scenario based on approximately 1.8% annual job growth over the next 20 years is recommended as an appropriate and reasonably attainable employment growth target. Of equal importance (and perhaps of greater policy significance to the City) is the selection of an appropriate commercial/industrial job mix that reflects both realistic market expectations together with City planning and policy objectives.

Three alternatives have been identified and resulting land demand implications evaluated with the 2003 economic market analysis and this updated report – current mix, changing share, and industrial land focus. Undoubtedly other alternatives or hybrid scenarios could also be considered.

Recommended for further consideration by the City of Medford is a scenario that approximates the *changing share* alternative. Reasons for this recommendation include:

- Consistency with recent market trends in Medford, as well as statewide and nationally.
- General consistency with the approach suggested by the preliminary draft review of *Siting Criteria for Commercial & Industrial Lands* (dated June 18, 2004).
- Need to add less commercial and industrial land than would be indicated by the industrial land focus alternative.
- Accounting for all employment uses to occur on industrial and commercial land – with no need to accommodate a portion of future employment growth on residential or other land.
- Opportunity with this approach to provide more flexibility in land use and economic development to capture most likely sources of job growth in the future.

Despite these potential advantages, selection of a changing share method poses a clear set of issues and challenges for Medford. Perhaps most significant would be the need to obtain added commercially designated land – likely involving redesignation of some industrial lands. Of particular importance would be the need to select sites for future commercial use that are most likely to be at locations with outstanding access and valued by the market. At the same time, mechanisms to preserve the remaining industrial inventory from further commercial encroachment would be warranted.

IV. SITING CRITERIA

The second major purpose of this supplemental commercial and industrial lands study has been to identify and characterize a set of siting criteria that can be applied to making modifications to the City of Medford's Comprehensive Plan, land use designations and associated land development code.

Criteria are outlined in a manner allowing for an assessment of the types of land best suited for commercial versus industrial activity. Properties identified for future development as a result of the lands inventory analysis versus demand forecast can then be evaluated against each of the criteria to ascertain most appropriate land use. In effect, this assessment is intended to lead toward preliminary recommendations as to best locations for varying types of industrial and commercial activity in Medford.

INDUSTRIAL LANDS REVIEW

Topics covered include a description of current General Land Use Plan (GLUP) and implementing zoning designations for industrial lands, followed by a review of market and policy questions resulting from the prior market analysis, Planning Commission discussion, and this update evaluation.

Current Designations: There are two industrial land use designations available with Medford's General Land Use Plan (GLUP):

- *Heavy Industrial (HI)* – for uses associated with a large amount of noise, vibration, air pollution or other nuisance. Implementing zoning occurs through both Heavy Industrial (I-H) and General Industrial (I-G) districts.
- *General Industrial (GI)* – for all other industrial use. Zoning that is applied on a site-by-site basis is determined as either:
 - ✓ Light Industrial (I-L) – intended for office uses and light manufacturing and deemed suitable for areas near residential and commercial properties.
 - ✓ General Industrial (I-G) – for industrial uses involving a degree of noise, vibration, air pollution, radiation, glare, fire and/or explosive hazards, and therefore suitable for areas near Heavy Commercial and Heavy Industrial zoning.

The area of the Rogue Valley International Airport is designated under GLUP as Airport (A), with some implementation of Light Industrial (I-L) as well as Airport Approach (A-A) zoning. Some land outside the City limits but within the Urban Growth Boundary (UGB) is targeted for future industrial use but currently designated as Agriculture – with the intent of eventual transition to an industrial designation.

Industrial Designation Market & Policy Questions: On an initial basis, the Planning Commission memorandum of February 25, 2004 concluded that there appears to be an adequate (30+ year) supply of vacant industrial land within the City and Urban Growth Boundary (UGB). The updated inventory and economic forecast presented earlier indicates a more uncertain result

– with the potential of having a less than adequate 20-year supply depending on the land forecast methodology selected and the extent to which sites affected by environmental constraints prove to be unsuitable for development.

Both the Planning Commission and 2003 Medford Economic Market Analysis also have identified commercial use of industrial lands as a significant policy issue. With 35% of commercial development in Medford occurring on industrial lands, the effect of this commercial use encroachment is to reduce land available for industrial uses and to increase land pricing as commercial uses typically will pay more for property than industrial uses.

Market issues specific to the heavy and light industrial GLUP designations together with policy recommendations for consideration are outlined as follows:

- *Heavy Industrial (HI)* – is identified by the Planning Commission as providing more than an adequate supply of land, with the added expectation that the City will not attract significant new heavy industrial uses in the future. Also noted is that modern industrial development and regulatory practices have substantially diminished the *externality* (or nuisance) effects of what traditionally has been considered as heavy industrial activity. Recommended for consideration is the transition of HI to a reconfigured General Industrial designation for GLUP that would encompass the full range of potential industrial activity. This broad list of allowed uses would be subject to performance standards to address or minimize readily apparent nuisance issues extending beyond the property line or to adjoining non-industrial areas.
- *General Industrial (GI)* – currently covers a broad range of uses from light and general manufacturing to office development. Resolution of conflicts between widely varying uses with differing site needs and abilities to pay for land is identified with this analysis as a potentially important priority for land use updates.

Recommended for consideration is an approach that would redesignate what is currently shown as light industrial land (GI) into one of two new or reconfigured GLUP categories:

- ✓ A reconfigured General Industrial land designation – including existing HI uses plus the former GI uses at locations associated with lesser land values that are least competitive for commercial office, service and retail uses. This revamped GI classification might be accompanied by commercial use restrictions and minimum parcel size limitations – or measures to discourage premature parcelization in advance of end user demand.
- ✓ A new Business Park (BP) type of designation – for existing GI sites that are more highly valued and which currently or prospectively are most likely to be developed for uses extending beyond traditional industrial activities, including campus office and a limited range of complementary retail uses. Master planning of BP sites should be encouraged. If new land is zoned for BP use, strong consideration should be given to identifying high amenity sites attractive to campus oriented technology, research and development and office related uses. Included for consideration might be sites on rolling terrain at the edge of the City and/or UGB.

COMMERCIAL LANDS REVIEW

As with the industrial review, this discussion starts with a description of current GLUP and associated zoning designations, followed by an outline of market and policy questions for commercial lands.

Current Designations: Medford's General Land Use Plan (GLUP) has three commercial designations plus additional implementing zoning districts:

- *Service Commercial (SC)* – permitting offices, medical facilities, other limited service oriented businesses as well as residential under certain circumstances. Implementing zoning is C-S/P (Service Commercial and Professional Office).
- *Commercial (CM)* – permitting the largest spectrum of commercial development as well as residential uses under certain circumstances. Zoning categories are:
 - ✓ Neighborhood Commercial (C-N) – for smaller sites of less than 3 acres within residential neighborhoods.
 - ✓ Community Commercial (C-C) – a general commercial designation with locations on collector and arterial roadways.
 - ✓ Regional Commercial (C-R) – with larger sites serving shoppers from the surrounding region as well as from the local community.
 - ✓ Heavy Commercial (C-H) – for heavy auto/truck and service oriented commercial development situated along highways and near industrial zones.
- *City Center (CC)* – as the designation for the regional governmental, financial and business service center complex in the downtown area. CC encompasses the areas within the *City Center Revitalization Plan* (for urban renewal) and the *Civic Center Plan*. While there is no specific zoning district, the Central Business (C-B) overlay zone which mostly includes CC zones with some HC zoning covers most of the City Center plan designated area and provides special standards recognizing the unique and historic character of the downtown.

A new *City Center 2050 Plan* completed in March 2004 recommends the City Center as a Regional Transit Oriented District with five land use/zoning categories – Regional Transit High Density Residential, Regional Mixed Use Residential, Regional Transit Employment, Civic and Open Space.

Commercial Designation Market & Policy Questions: The Planning Commission, the 2003 economic market analysis and this analysis all conclude that commercial land is in far shorter supply than industrial land. The Planning Commission report indicates that there is only an 11.7-year supply of developable commercial land in the City (with a 13-year supply in the UGB) and, on an interim basis, recommends designating additional commercial on a limited case-by-case basis pending completion of this updated commercial/industrial lands analysis. The conclusion of a long-term (20-year) commercial land shortage is corroborated by this lands study.

Market issues specific to the commercial GLUP designations together with policy recommendations for consideration are outlined as follows:

- *Service Commercial (SC)* – was associated with a limited (less than 10 acre) inventory of vacant sites according to the 2003 economic market analysis. However, because of the role that SC land can play for rapidly growing employment activities such as offices, medical facilities and service oriented businesses, more attention to these needs may be warranted.

One option might be to allocate SC-type land between one of two possible GLUP designations:

- ✓ A new BP designation (outlined above) – which could be tailored to also accommodate such former SC uses as office parks and medical facilities.
 - ✓ A new Mixed Use (MU) designation – encouraging mixed use office, residential and commercial, perhaps in conjunction with refinement of the Central City (CC) GLUP designation and also with transit oriented development (TOD) as may be designated elsewhere in the City.
- *Commercial (CM)* – accounts for over 95% of the vacant commercially designated property inventory and is perhaps the most problematic of the commercial GLUP designations, indicated by the wide range of zoning designations which are covered:
 - ✓ Neighborhood Commercial (C-N) – appears to be applied sparingly in Medford at present. The 3-acre size designation is generally too small to accommodate a multi-tenant, grocery-anchored neighborhood center. Recommended for consideration would be allocation of larger sites of 5-10 acres consistent with current development practices for grocery-anchored neighborhood convenience and community centers as part of a revised C-C zone.

With the possible exception of pre-existing uses not expected to change appreciably, some smaller C-N sites might then be transitioned to some form of a Mixed Use (MU) category which encourages residential, small scale neighborhood convenience retail and possibly office (or work/live) uses. *Note:* The C-N zone currently limits retail use sizes (to 2,500 square foot), while C-C allows substantially larger uses (up to 50,000 square feet).

- ✓ Community Commercial (C-C) – represents a category commonly applied to commercial along major transportation corridors, often resulting in a overly wide range of uses and unsatisfactory visual aesthetics for the community. This zone could be maintained as-is. Alternatively, consideration could be given to redesignating some C-C sites to a more precise C-R, C-H or MU designation, depending on location and refocusing this category on anchored neighborhood centers including addition of larger C-N properties.
- ✓ Regional Commercial (C-R) – represents a use category for which continued strong demand can be expected, especially for large format retail uses serving Medford and the southern Oregon region. C-R sites are appropriately master planned – with attention to design including traffic/parking management and aesthetic improvements. Configurations of building space and existing sites also can be expected to evolve over time – due to rapid changes occurring with retail development both regionally and nationally. A review process that covers design

and other potential site-specific impacts might be considered as part of C-R redesignation or authorization.

- ✓ Heavy Commercial (C-H) – serves an important role for auto and repair oriented uses, with locations along major arterials – typically situated away from the commercial core of the community. Recommendations are limited to the possible addition of some C-H inventory if the C-C zone is phased out and the long-term improvement of aesthetic standards for both new development and existing sites. Another option might be to transition some C-H sites with a strong wholesale/service industrial orientation to either a GI or BP designation.
- *City Center (CC)* – is identified as having virtually no vacant commercial sites and has experienced little new construction (with the new library a notable exception) but with substantial building rehabilitation activity. The downtown’s ability to accommodate new construction represents an important land use market and policy question for the City of Medford because significant new office or retail development in downtown could lessen the need for some of this activity elsewhere in Medford.

The recently completed *City Center 2050 Plan* recommends that 30% of the office space anticipated to be developed City-wide over the next 10 years be located in the downtown. Achieving this would represent a significant departure from recent experience, with less than 1% of new office space developed since 1990 being located downtown (based on the June 2003 *Medford Office Market Study*).

As is indicated by our land demand projections, two alternative office futures can be envisioned: a) continuation of recent experience with minimal new office development in the downtown (shown as the baseline forecast); and b) adoption of a policy objective backed by implementation measures to actively target 30% of new office construction for downtown.

There also is a parallel opportunity to revisit land use planning for the City Center area. One approach would be to create transit overlay zones as is recommended by the *City Center 2050 Plan*. It is possible that the 2050 plan objectives could be accomplished within the land use streamlining framework suggested by this analysis. Potential changes consistent with this framework might include measures such as:

- ✓ Removal of the C-B (Central Business) overlay system in favor of a streamlined zoning designation more comparable to that of other commercial districts.
- ✓ Possible transition to a Mixed Use (MU) designation, similar to what is suggested for some SC land, but perhaps associated with higher permitted densities.
- ✓ Incorporation of incentives to encourage additional new investment – both new construction and rehabilitation, and more intensified use of underutilized properties.

INDUSTRIAL & COMMERCIAL SITING CRITERIA

The market and policy discussion outlined above provides a suggested framework within which the need for new industrial and commercial lands and possible redesignation of existing sites can be considered. The discussion now becomes more *location specific*.

Three steps could be considered as part of a location analysis: a) identification of siting criteria suitable for various industrial and commercial uses; b) matching appropriate GLUP and zone designations to existing uses; and then c) mapping where GLUP and zone designations prospectively occur for new development or significant redevelopment.

This report addresses the *first step* – by outlining recommended location criteria as part of the matrix chart on the following page. Use categories (or designations) are consistent with those suggested for consideration by this analysis. However the discussion is intended to illustrate siting criteria appropriate even if an alternative set of GLUP and zoning designations were selected.

Four overall sets of criteria are identified and briefly outlined for each of the designations:

- *Illustrative uses* – indicating the most appropriate types of industrial/commercial employment activity intended with each GLUP/zoning designation.
- *Location & access* – covering key location requirements for each designation, especially transportation access.
- *Valuation* – of land indicated on a relative basis (from low to high) for one set of uses compared with the other industrial/commercial designations considered.
- *Sizing* – based on market requirements of the use, focused on new uses and including comments as appropriate regarding parcelization.

Also provided are additional *comments*, covering other key features likely to be important for implementation of the recommended designation.

Figure 10. Industrial & Commercial Siting Criteria

Designation	Illustrative Uses	Location & Access	Valuation	Sizing	Comments
General Industrial (GI)	Manufacturing wholesale/distribution, construction, transportation, utilities, regional public facilities	Historic industrial areas plus large sites suitable for truck access and buffered from residential. Rail accessibility not required but is an asset	Low	10-50+ acres, discourage premature parcelization	Allows outdoor storage. Accompanied by performance standards to limit nuisance effects beyond the industrial area
Business Park (BP)	Industrial, office, and ancillary retail (as conditional use and/or with size limitations)	On or with access to arterials suitable for truck traffic. Near airport, commercial and/or high amenity locations	Medium/Low	5-30+ acres, encourage master planned development	Limits outdoor storage, emphasizes quality of site plan including landscaping, possible retail limit of 10%
Commercial (CM)					
• Heavy (C-H)	Service-commercial especially uses with auto/truck orientation	Situated on major arterial or highway with historic heavy commercial use	Medium	For new uses, encourage parcel and access consolidation	Emphasis on improving visual and aesthetic qualities of new and existing uses over time
• Regional (C-R)	Multi-tenant centers and free-standing large format retailers serving local plus regional market areas	Major arterial(s) with direct freeway access	Medium/High	10-50+ acres with master planned development	Encourages reconfiguration of older centers, emphasizes quality of site plan and addressing site-specific impacts with redesignation
• Neighborhood & Community (C-C)	Multi-tenant and free-standing convenience retail and services, often grocery-anchored	Major city street and intersection locations, serving 10,000+ population, located to complement neighborhood services and amenities	Medium	Ideally 5-10+ acres for new sites, potentially smaller for existing uses	Encourages pedestrian orientation. Potentially includes size limitations on commercial uses, with greater flexibility for grocery
Mixed Use (MU)					
• City Center	Retail, office, public/non-profit, multi-level residential	Historic downtown location with improved gateways from major arterials	High	For new uses, encourage ¼ block or larger sites	Needs incentives for density plus public/private parking
• Village Center/ Transit Oriented Development (TOD)	Similar to City Center but with more residential, small scale retail, office and work/live	Typically on major arterials and as buffer between residential to commercial/industrial use	Medium	4+ acres, encourage master planned development	Offers flexibility for developer proposal

V. FINDINGS & RECOMMENDATIONS

This commercial and industrial land study concludes with a summary of major findings and next steps recommended for consideration by the City of Medford.

SUMMARY OF FINDINGS

Key *findings and observations* resulting from this analysis are summarized as follows:

- In cooperation with City of Medford planning and economic development, five land use inventory iterations were conducted, starting with the 2003 economic market analysis.
- The recommended inventory identifies an estimated 350 acres of vacant and redevelopable commercial land together with almost 1,288 acres of industrial land – for a combined developable commercial/industrial land inventory approaching 1,638 acres.
- Using a recommended land demand scenario predicated on a changing share methodology with some continued shift from industrial to commercial use, demand for commercial land is projected at 650 acres over a 20-year period with demand for industrial projected at 844 acres – for combined commercial/industrial land need of 1,494 acres.
- A comparison of land demand (or need) with supply indicates that Medford could require designation of up to an added 300 acres of commercial land while at the same time being oversupplied with industrial sites in the amount of an estimated 444 acres. Taken together, there appears to be an adequate inventory of commercial and industrial land, although redesignation of some industrial sites to commercial may be warranted – potentially leaving a reserve of nearly 144 acres unless offset by redesignation of some commercial/industrial lands to other uses and/or swapping of commercial/industrial with other land designations.
- This report outlines criteria that could be considered for siting of future anticipated industrial and commercial uses in the City of Medford plus the as-yet unincorporated Urban Growth Boundary (UGB). A matrix format is suggested, describing illustrative uses by General Land Use Plan (GLUP) designation together with potentially relevant criteria pertaining to location and access, valuation and property sizing/parcelization.

NEXT STEPS

Based on the analysis and findings of this study, the following *next steps* are recommended for discussion with the City of Medford Planning Commission and City Council:

- Adoption of the commercial/industrial inventory and land demand/needs forecast recommended with this report as a basis for *Goal 9 compliance* and future land use designations.
- Acceptance of recommended siting criteria as a *working guide* to redesignation of industrial and commercial GLUP and zoning classifications.
- Matching appropriate revised GLUP/zoning designations to existing uses, followed by *mapping for prospective uses* including new development and redevelopment.

APPENDIX. CONSULTANT BACKGROUND

The 2003 economic market study and this 2004 Goal 9 supplemental analysis have been prepared for the City of Medford by the economic and development consulting firm E. D. Hovee & Company. Since 1984, the firm has conducted market and feasibility assessments together with strategic economic development plans for private, non-profit and public agency clients – primarily in the Pacific Northwest states of Oregon and Washington.

A particular focus of the firm is on industrial and commercial land assessments in compliance with state land use planning requirements for industrial and commercial lands – Goal 9 in the state of Oregon and the Growth Management Act (GMA) in the state of Washington. Examples of comparable project assignments have included:

- Industrial marketing and image assessment for the City of Roseburg and Douglas County.
- Goal 9 industrial/commercial assessments for Oregon jurisdictions including the Cities of Wilsonville, Gresham, and Forest Grove and for Hood River and Deschutes Counties.
- Key industries analysis and site marketing for the Oregon Economic and Community Development Department.
- Phase I of a greater Portland metropolitan employment lands study (GMELS) on behalf of a public-private consortium with representation from Metro, the Port of Portland, Oregon DLCDC, local jurisdictions and participating private interests including the Commercial Real Estate Economic Coalition (CREEC).
- Economic development components of GMA plans for Washington State jurisdictions including Clark, Lewis and Skagit Counties and the cities of Longview and Shelton.
- Economic need and land use assessments for a range of private clients including local/regional property owners and development firms as well as major national regional firms such as Fred Meyer, Home Depot and Wal-Mart.
- Downtown and mixed use redevelopment projects on behalf of clients as diverse as the Portland Development Commission, Port of Hood River, and Cities of Eugene, Salem, Gresham, Hillsboro, Vancouver, Tacoma, SeaTac, Snoqualmie and Bellingham.

This commercial and industrial lands study has been prepared jointly by Eric Hovee, Principal and Paul L. Dennis, Associate Principal.