

Appendix A. Outreach Summary

The City of West Linn of West Linn is conducting an economic opportunities analysis (EOA). The EOA will serve as a basis for the City to help make West Linn a more economically viable community while maintaining a good quality of life for residents, businesses, and workers. By creating this EOA, City staff will address state requirements to periodically review and update:

- West Linn’s vision for strengthening its economy through the adoption of policies that include community economic development objectives.
- Urban growth requirements (land needs) for providing an adequate land needed to accommodate 20-year employment growth forecasts.

The City is engaging community members in a variety of ways to help develop this updated vision and associated community economic development objectives. The Cogan Owens Cogan consultant team conducted interviews with six (6) officials and economic development experts to help assess current and future economic development needs and issues as part of their economic development comprehensive plan update. These interviews include:

- City of West Linn elected officials
- Clackamas County Business and Economic Development
- West Linn Chamber of Commerce

In addition, 87 community members responded to an online questionnaire to share their ideas about future economic development and employment in West Linn. This report is a summary of stakeholder interview and community questionnaire results.

Summary of Six Stakeholder Interviews

1. What is West Linn’s market advantage in the State of Oregon and Metro Region with regard to attracting population and jobs? What do you feel are its greatest assets today?

Benefits

- Good commercial core near 10th St. and Robinwood.
- Livability, quiet bedroom community, good schools, nice parks/access to Willamette River.
- Nice historic core in Old Willamette District.
- Paper industry, home-based businesses, small retail operations, large pool of professionals.
- Proximity to Portland.

Challenges

- Competition from suburban office markets such as Kruse Way and campuses off of I-205 in Clackamas.
- Lack of affordable and “workforce” housing.
- Not a lot of vacant commercial land.
- Need to diversify with professional and business services. Not likely to attract traditional industrial businesses.

Opportunities

- Incentives such as improvement grants and tax breaks to make West Linn a more attractive office market, especially where I-205 runs through the city.

- Mixed-use housing and commercial retail. Great opportunity to redevelop Highway 43 corridor with mix of office, commercial and housing.
- More office uses after Kruse Way builds out over the long term.

2. From the list below, please identify West Linn’s primary strengths as a place to do business?

Stakeholders agree unanimously that the quality of life in West Linn is its primary strength as a place to do business. Interviewees also agree that the general business climate in West Linn is good, thanks to dedicated staff and elected officials. Public infrastructure, other than a lack of public transportation, is also seen as a strength. While there is not much vacant land available for new commercial or industrial development, there is quite a bit of redevelopment potential. Stakeholders vary in their assessment of West Linn’s access to local markets and customers as well as the I-5 corridor, with responses ranging from “excellent” to “poor.” Stakeholders also disagree about the quality of West Linn’s workforce. Those citing an “excellent” workforce referred to the high level of education. Those rating it as “poor” mention lower wage employees commuting from other parts of the region due to a lack of affordable housing in West Linn. Stakeholders indicate there is little in the way of business clusters or interaction among firms in the same and/or related industries in West Linn.

3. What can West Linn do in terms of local actions that can complement the regional and state economy?

- Consider incentives and varying system development charges (SDCs) for strategic non-residential development.
- Identify and attract businesses that enhance community and livability.
- Nothing specific, but consider some incentives to tip the scale for the office market a bit.
- Tax, SDC breaks and reduction of “red tape” as it relates to new development.

4. What are the best opportunities for economic development, in terms of specific sites or redevelopment areas? Number of mentions sited in parenthesis.

- Arch Bridge area (2)
- Savannah Oaks (2)
- Tannler/Blankenship (2)
- Across from Albertsons
- School district properties
- Urban growth boundary expansion, Borland Road
- Best property would be if paper mill closed
- Settling pond area owned by City
- A few small nodes, and redevelopment corridors and Bolton District
- Potential for retail development adjacent to I-205

5. What business clusters exist or should exist in West Linn? What can the City do to build and strengthen these clusters?

- Medical industry: dental offices, chiropractors, internal medicine, etc. (3)
- Assisted living/health care (2)
- Professional business services (2)
- Activity around river to draw in people

- Boutique retail
- Hi-tech, have class A office space
- Home-based businesses, incubation, start ups
- Paper mill

6. What actions should be taken by the City to create a more balanced and sustainable community?

- Establish partnerships to provide workforce training and support for small businesses
- Identify redevelopment areas/sites where employment can be attracted.
- Include affordable housing in order to facilitate a more sustainable economy.
- Give home-based businesses somewhere to grow.
- Preserve lands for intended employment uses and protect them for jobs (limit housing).
- Study expanding into the Borland area long term.
- Target desired strategic businesses and market towards attracting them.

7. Is there anything else you'd like to add?

- Bring entrepreneurs together to help them collaborate.
- Capitalize on Willamette Falls development and access to river with support services for tourists and boaters; explore opportunities to reopen the locks.
- Market to/recruit desired businesses.
- Partner with Chamber of Commerce and other organizations.

Community Questionnaire

1. Indicate your support for West Linn's current Economic Development Goals. Responses from nearly 90 community members follow.

Goal	Do not support	Somewhat support	Support	Strongly support	Average rating
Encourage businesses that enhance the community; provide wanted goods and services; and pay living wages. Small, locally-owned businesses with strong ties to the community are especially desired.	3	5	22	52	3.50
Encourage the retention, expansion and economic viability of existing business and industry.	3	14	28	33	3.17
Make the most efficient use of our existing commercial and industrial lands.	5	11	26	34	3.17
Support telecommuting, home-based businesses compatible with residential neighborhoods and, in general, a higher jobs-to-housing ratio.	6	15	32	27	3.00
Retain, strengthen, and expand the City's existing business base.	4	19	30	27	3.00
Provide adequate commercial and industrial land for a range of employment opportunities in the City.	20	17	24	20	2.54

2. Identify West Linn’s strengths to build on and weaknesses to address as a place to do business.

Strength/Weakness	Major Weakness	Minor Weakness	Minor Strength	Major Strength	Average rating
Quality of life	0	1	13	64	3.81
Proximity to I-5 and other transportation corridors	3	8	25	41	3.35
Available, skilled workforce	2	12	24	32	3.23
Access to local markets and customers	4	18	41	13	2.83
Streamlined permitting processes	13	23	18	12	2.44
Interaction with firms in the same and/or related industries	7	31	26	3	2.37
General business climate	16	23	26	8	2.36
Public infrastructure (transportation, utilities, etc.)	17	28	25	9	2.33
Reasonable development fees	18	22	20	7	2.24
Available land and buildings for employment growth	19	31	19	5	2.14

3. What services are needed to complement existing businesses and help West Linn residents meet their daily needs?

- Restaurants (10)
- Market, bakery, coffee (8)
- Streets, traffic, circulation, parking (8)
- Gym/activity center with a pool (6)
- Hotel and hospitality (6)
- Walkability, sidewalks, paths (5)
- Clothing (4)
- Gas station, automotive services, car wash (4)
- Office supplies (4)
- Drug store (3)
- Entertainment: movie theater, bowling alley (3)
- Favorable tax incentives, reasonable permitting (3)
- Homewares, hardware, gardening (3)
- Public transit (3)
- Boutique, clothing, gifts (2)
- Educational services (2)
- Intra-urban shuttle (2)
- Sports complex (2)

4. What business clusters should we attract or grow in West Linn?

- Professional services: design, finance, education (8)
- Light/clean industry/manufacturing (5)
- Retail (5)
- Tourism/hospitality (4)
- Hi-tech (3)
- Start up (2)
- Government/administration offices (2)
- Home office based businesses (2)

- Medical (2)
- Storage facilities
- Aquaculture
- Large corporate campus
- Large retirement communities

5. What are the best opportunities for economic development, in terms of specific sites or redevelopment areas?

- Arch Bridge (17)
- Along Hwy 43 (11)
- Robinwood shopping plaza (5)
- Old Town Willamette (4)
- Market of Choice (4)
- I-205 corridor (3)
- Existing properties (3)
- Savannah Oaks (3)
- Willamette area (3)
- Albertsons shopping center (2)
- Downtown (2)
- Safeway/Tanner Creek Park area (3)
- Stafford (2)
- Ace Hardware shopping area
- Adjacent/behind post office
- Cascade Summit Plaza
- Corner of Hood and Burns
- Next to Key/Ameriprise are several parcels
- 5 Guys shopping center
- Tannler Drive
- West Linn Central Village

APPENDIX B. RETAIL DEMAND AND SUPPLY IN WEST LINN

Summary Demographics					
2014 Population	25,930				
2014 Households	9,912				
2014 Median Disposable Income	\$71,819				
2014 Per Capita Income	\$46,082				
Store Group	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/ Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	\$87,064,704	\$3,677,854	\$83,386,850	91.9	7
Automobile Dealers	\$73,310,089	\$2,094,074	\$71,216,015	94.4	1
Other Motor Vehicle Dealers	\$6,285,409	\$1,262,093	\$5,023,316	66.6	4
Auto Parts, Accessories & Tire Stores	\$7,469,206	\$321,687	\$7,147,519	91.7	2
Furniture & Home Furnishings Stores	\$10,291,615	\$2,104,101	\$8,187,514	66.1	9
Furniture Stores	\$5,533,033	\$933,963	\$4,599,070	71.1	3
Home Furnishings Stores	\$4,758,582	\$1,170,138	\$3,588,444	60.5	6
Electronics & Appliance Stores	\$12,621,484	\$2,110,641	\$10,510,843	71.3	3
Bldg Materials, Garden Equip. & Supply Stores	\$15,870,165	\$3,975,127	\$11,895,038	59.9	13
Bldg Material & Supplies Dealers	\$13,137,208	\$1,584,009	\$11,553,199	78.5	11
Lawn & Garden Equip & Supply Stores	\$2,732,957	\$2,391,118	\$341,839	6.7	2
Food & Beverage Stores	\$82,980,824	\$118,328,690	(\$35,347,866)	-17.6	26
Grocery Stores	\$77,049,421	\$113,453,073	(\$36,403,652)	-19.1	10
Specialty Food Stores	\$2,366,817	\$1,031,582	\$1,335,235	39.3	10
Beer, Wine & Liquor Stores	\$3,564,586	\$3,844,035	(\$279,449)	-3.8	6
Health & Personal Care Stores	\$26,688,629	\$27,788,682	(\$1,100,053)	-2.0	10
Gasoline Stations	\$36,152,010	\$28,369,828	\$7,782,182	12.1	12
Clothing & Clothing Accessories Stores	\$26,491,409	\$3,992,138	\$22,499,271	73.8	22
Clothing Stores	\$19,514,044	\$1,726,500	\$17,787,544	83.7	13
Shoe Stores	\$3,693,970	\$156,799	\$3,537,171	91.9	1
Jewelry, Luggage & Leather Goods Stores	\$3,283,395	\$2,108,839	\$1,174,556	21.8	8
Sporting Goods, Hobby, Book & Music Stores	\$11,743,976	\$3,326,755	\$8,417,221	55.9	24
Sporting Goods/Hobby/Musical Instr Stores	\$9,819,206	\$2,722,531	\$7,096,675	56.6	21
Book, Periodical & Music Stores	\$1,924,770	\$604,224	\$1,320,546	52.2	3
General Merchandise Stores	\$75,103,389	\$239,835	\$74,863,554	99.4	1
Department Stores Excluding Leased Depts.	\$31,525,262	\$0	\$31,525,262	100.0	0
Other General Merchandise Stores	\$43,578,127	\$239,835	\$43,338,292	98.9	1
Miscellaneous Store Retailers	\$14,768,769	\$3,772,320	\$10,996,449	59.3	45
Florists	\$520,326	\$600,554	(\$80,228)	-7.2	5
Office Supplies, Stationery & Gift Stores	\$4,636,482	\$875,328	\$3,761,154	68.2	17
Used Merchandise Stores	\$2,276,810	\$134,463	\$2,142,347	88.8	2
Other Miscellaneous Store Retailers	\$7,335,151	\$2,161,975	\$5,173,176	54.5	21
Nonstore Retailers	\$31,726,018	\$4,582,277	\$27,143,741	74.8	10
Electronic Shopping & Mail-Order Houses	\$27,517,808	\$4,229,463	\$23,288,345	73.4	4
Vending Machine Operators	\$538,576	\$0	\$538,576	100.0	0
Direct Selling Establishments	\$3,669,634	\$352,814	\$3,316,820	82.5	6
Food Services & Drinking Places	\$49,337,081	\$32,754,881	\$16,582,200	20.2	41
Full-Service Restaurants	\$20,709,863	\$20,329,660	\$380,203	0.9	18
Limited-Service Eating Places	\$21,896,105	\$10,695,736	\$11,200,369	34.4	16
Special Food Services	\$2,027,938	\$694,854	\$1,333,084	49.0	4
Drinking Places - Alcoholic Beverages	\$4,703,175	\$1,034,631	\$3,668,544	63.9	3

Source: ESRI Marketplace Profile Report

Appendix C. Employment Land Need Assumptions

West Linn Employment Sectors to Building Type Assignment Assumptions						
Employment Sectors	Building Types					
	Office	Institutional	Flex/Bus. Park	Gen. Industrial	Retail	Total
Retail	5%		10%	0%	85%	100%
Services	70%	10%	0%	0%	20%	100%
Industrial	0%	0%	90%	10%	0%	100%
Government/Education	10%	90%		0%		100%

Source: Metro Draft 2009-2030 Urban Growth Report; modified to reflect local observations.

Net New Employment Forecast by Building Type, Scenario A Forecast for 2035

	Office	Institutional	Flex/Bus. Park	Gen. Industrial	Retail	Total
Retail Trades	23	-	46	-	391	460
Services	641	92	-	-	183	916
Industrial	-	-	260	29	-	289
Government/Education	24	213	-	-	-	237
Total	688	305	306	29	574	1,902

Net New Employment Forecast by Building Type, Scenario B Forecast for 2035

	Office	Institutional	Flex/Bus. Park	Gen. Industrial	Retail	Total
Retail Trades	28	-	55	-	468	550
Services	814	116	-	-	232	1,162
Industrial	-	-	36	4	-	40
Government/Education	15	135	-	-	-	150
Total	856	251	91	4	700	1,902

Source: FCS GROUP based on Metro Urban Growth Report; modified to reflect local observations.

Building Type to Land Needs Assumptions*

	Office	Government/Institutional	Flex/Bus. Park	Gen. Industrial	Retail
Refill/Redevelopment Job Allocation ¹	25%	5%	5%	20%	10%
Jobs Needing Vacant Allocation ²	75%	95%	95%	80%	75%
Building SF Per Job ²	250	600	550	700	500
Floor-Area-Ratio ²	0.40	0.30	0.30	0.25	0.30
Public Facility Net:Gross Adjustment	1.10	1.10	1.10	1.10	1.10
Work at Home Adjustment ⁴	0.20		0.15	-	0.05

* assumptions are intended to reflect a long-term average.

1/ Adjusts for building refill & vacancy allowances.

2/ Building density derived from Metro UGR assumptions.

3/ Allowances take into account land dedicated to public/utility easements.

4/ Allowance based on local business license data; and is generally consistent with national statistics by US Dept. of Labor, Bureau of of Labor Statistics, Technical information: "Work at Home in 2004".

Source: assumptions are generally consistent with the Metro Urban Growth Report; modified to reflect local observations.

Net New Redevelopment Building Space Needs (Floor Area) - 2035 Forecast

	Office	Institutional	Flex/Bus. Park	Gen. Industrial	Retail	Total
Scenario A	34,000	9,000	7,000	4,000	27,000	81,000
Scenario B	43,000	8,000	2,000	1,000	33,000	87,000

Net New Building Floor Area Development on Vacant Lands (Floor Area) - 2035 Forecast

	Office	Institutional	Flex/Bus. Park	Gen. Industrial	Retail	Total
Scenario A	103,000	174,000	136,000	16,000	205,000	634,000
Scenario B	128,000	143,000	40,000	2,000	249,000	562,000

Vacant Land Need (gross buildable acres) - 2035 Forecast

	Office	Institutional	Flex/Bus. Park	Gen. Industrial	Retail	Total
Scenario A	7	15	11	2	17	51
Scenario B	8	12	3	0	21	45

Building to Land Use Assignment Assumptions

Local Zoning Classification	Office	Institutional	Flex/Bus. Park	Gen. Industrial	Retail
Commercial/Office	90%	20%	20%	0%	80%
Mixed Use	10%	0%	0%	0%	20%
Institutional	0%	80%	0%	0%	0%
Industrial	0%	0%	80%	100%	0%
Total	100%	100%	100%	100%	100%

Assumptions by FCS GROUP and City of Lake Oswego planning staff based on local observations.

Vacant Land Demand by Zoning Classification, West Linn USB (with current zoning regulations), 2035 Forecast

Land Use Classification	Scenario A	Scenario B
Commercial/Office	25	27
Mixed Use	4	5
Institutional	12	10
Industrial	11	3
Total	51	45

Assumptions by FCS GROUP based on above listed assumptions and local observations.

Appendix D: Summary of West Linn Employment Zones

The following is an overview of employment lands and zones for the City of West Linn. A general description of each zone is provided along with common and specific development standards when applicable.

Commercial Zones

Neighborhood Commercial (NC)

Provide for convenience goods and services within a cluster of stores. Convenience goods are goods which are bought frequently, at least weekly, and for which people do not engage in comparison shopping. The range of uses is limited to those uses which can be supported by a limited trade area. Uses in this district are intended to meet neighborhood needs as opposed to community-wide needs.

General Commercial (GC)

Provide for the concentration of major retail goods and services at centers. The intent is to provide for the provision of a variety of goods and services and for comparison shopping, to accommodate new businesses and employment opportunities, to promote a suitable mix of commercial uses, to contribute to community identity and to assure that the commercial development is scaled to blend with nearby residential areas, and that the residential areas are protected from noise, glare of lights, traffic congestion and other possible adverse effects.

Office Business Center (OBC)

Provide for groups of business and offices in centers, to accommodate the location of intermediate uses between residential districts and areas of more intense development, to provide opportunities for employment and for business and professional services in close proximity to residential neighborhoods and major transportation facilities, to expand the City's economic potential, to provide a range of compatible and supportive uses, and to locate office employment where it can support other commercial uses. The trade area will vary and may extend outside the community.

Industrial Zones

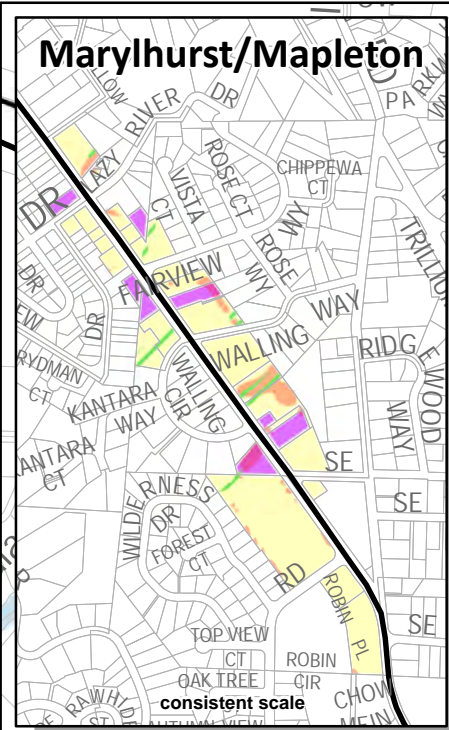
Campus Industrial (CI)

Provide a mix of clean, employee intensive industries, offices, and retail commercial uses which have no off-site impacts in terms of noise, odor, glare, lights, vibration, smoke, dust or other types of off-site impacts. The zone provides for combining parking, landscaping and other design features which physically and visually link structures and uses within one development.

General Industrial

Provide for manufacturing, processing and assembling uses which are of a size and scale which makes them generally incompatible with other adjoining non-industrial uses. The uses included in this zone are generally characterized by large buildings and large storage areas and have off-site effects from smoke, odor, noise, dust, lights or other externalities.

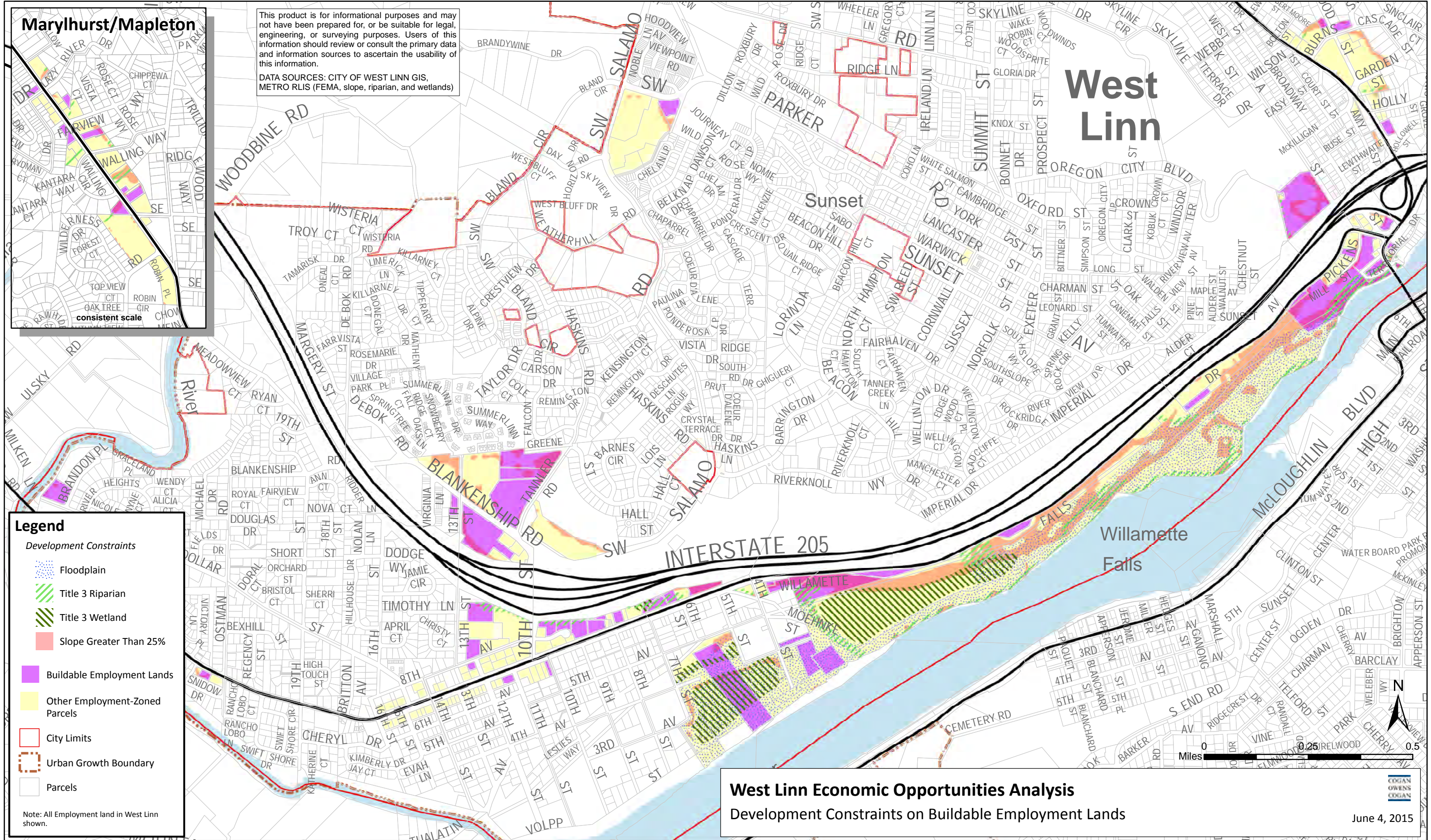
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DATA SOURCES: CITY OF WEST LINN GIS, METRO RLIS (FEMA, slope, riparian, and wetlands)

West Linn



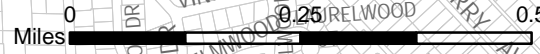
Legend

- Development Constraints**
- Floodplain
 - Title 3 Riparian
 - Title 3 Wetland
 - Slope Greater Than 25%
- Buildable Employment Lands**
- Buildable Employment Lands
 - Other Employment-Zoned Parcels
- Other Features**
- City Limits
 - Urban Growth Boundary
 - Parcels
- Note: All Employment land in West Linn shown.

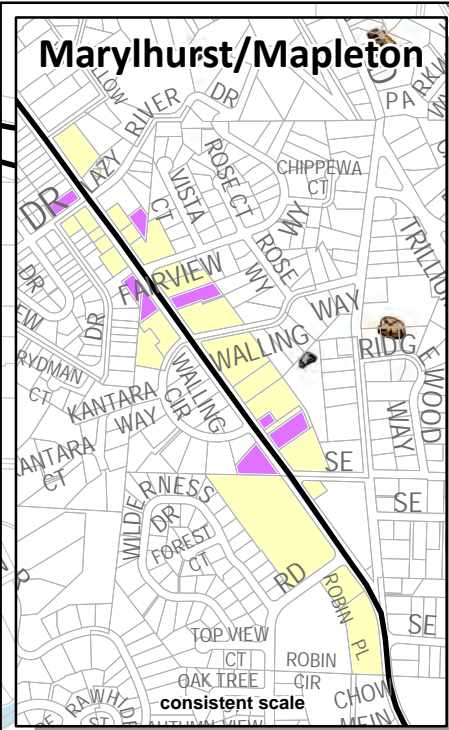
West Linn Economic Opportunities Analysis
 Development Constraints on Buildable Employment Lands



June 4, 2015

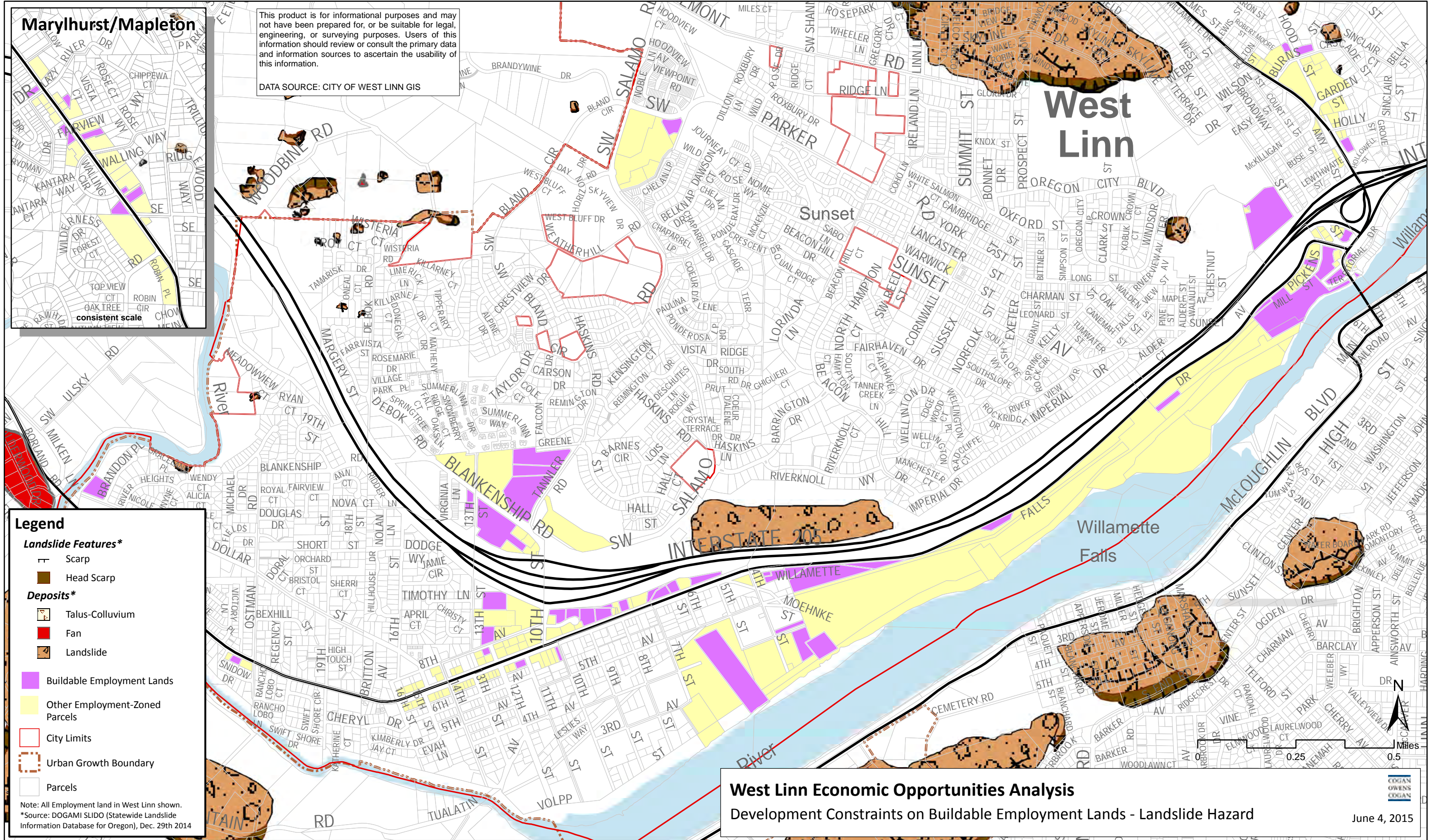


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DATA SOURCE: CITY OF WEST LINN GIS



Legend

Landslide Features*

- Scarp
- Head Scarp

Deposits*

- Talus-Colluvium
- Fan
- Landslide

Buildable Employment Lands

Other Employment-Zoned Parcels

City Limits

Urban Growth Boundary

Parcels

Note: All Employment land in West Linn shown.
*Source: DOGAMI SLIDO (Statewide Landslide Information Database for Oregon), Dec. 29th 2014

West Linn Economic Opportunities Analysis

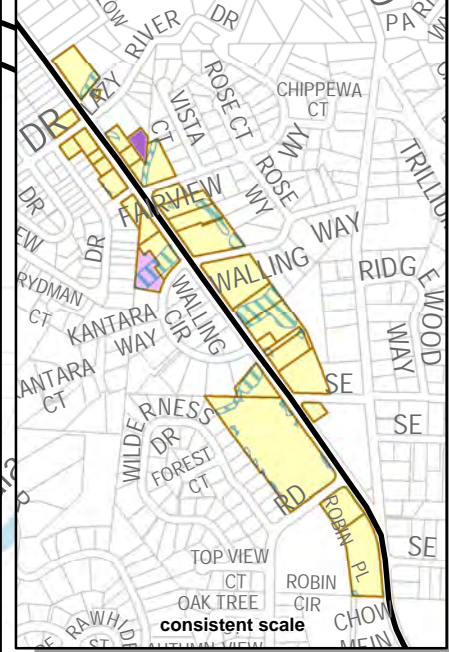
Development Constraints on Buildable Employment Lands - Landslide Hazard



June 4, 2015

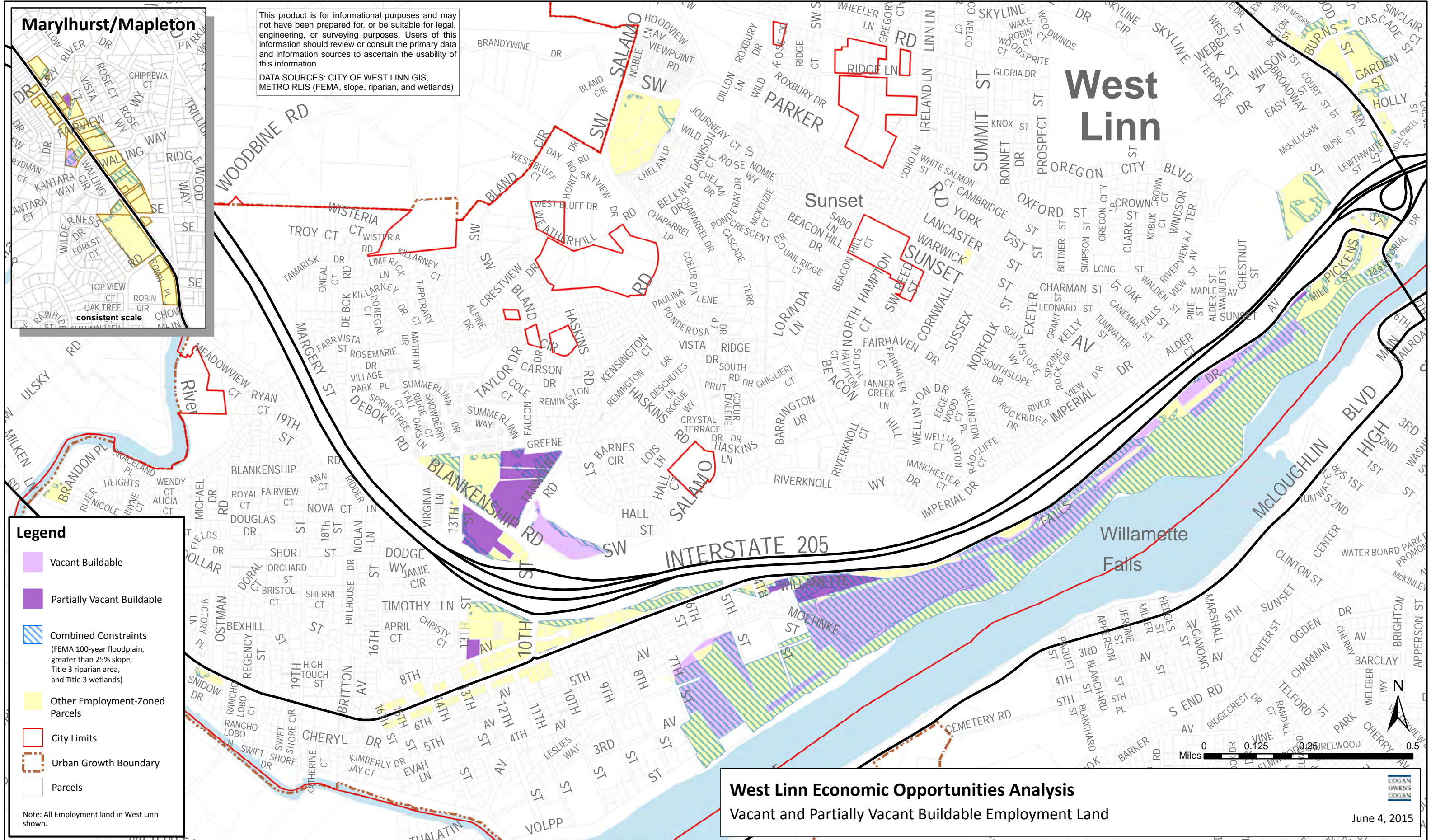


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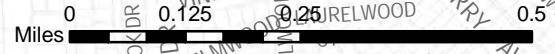
- Vacant Buildable
- Partially Vacant Buildable
- Combined Constraints
(FEMA 100-year floodplain, greater than 25% slope, Title 3 riparian area, and Title 3 wetlands)
- Other Employment-Zoned Parcels
- City Limits
- Urban Growth Boundary
- Parcels

Note: All Employment land in West Linn shown.

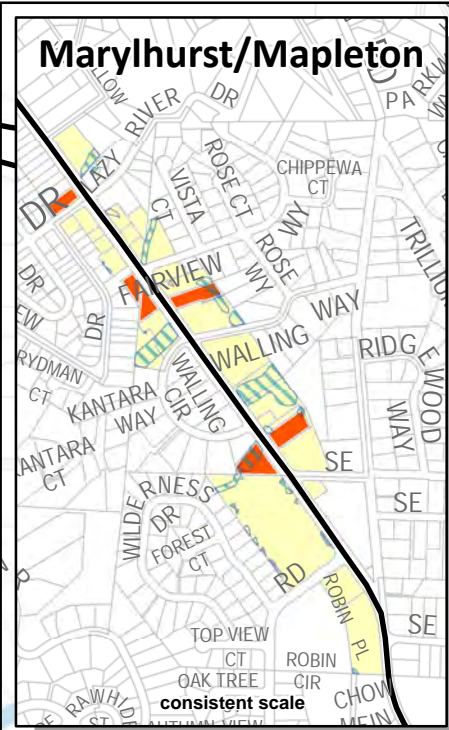
West Linn

West Linn Economic Opportunities Analysis
Vacant and Partially Vacant Buildable Employment Land

June 4, 2015

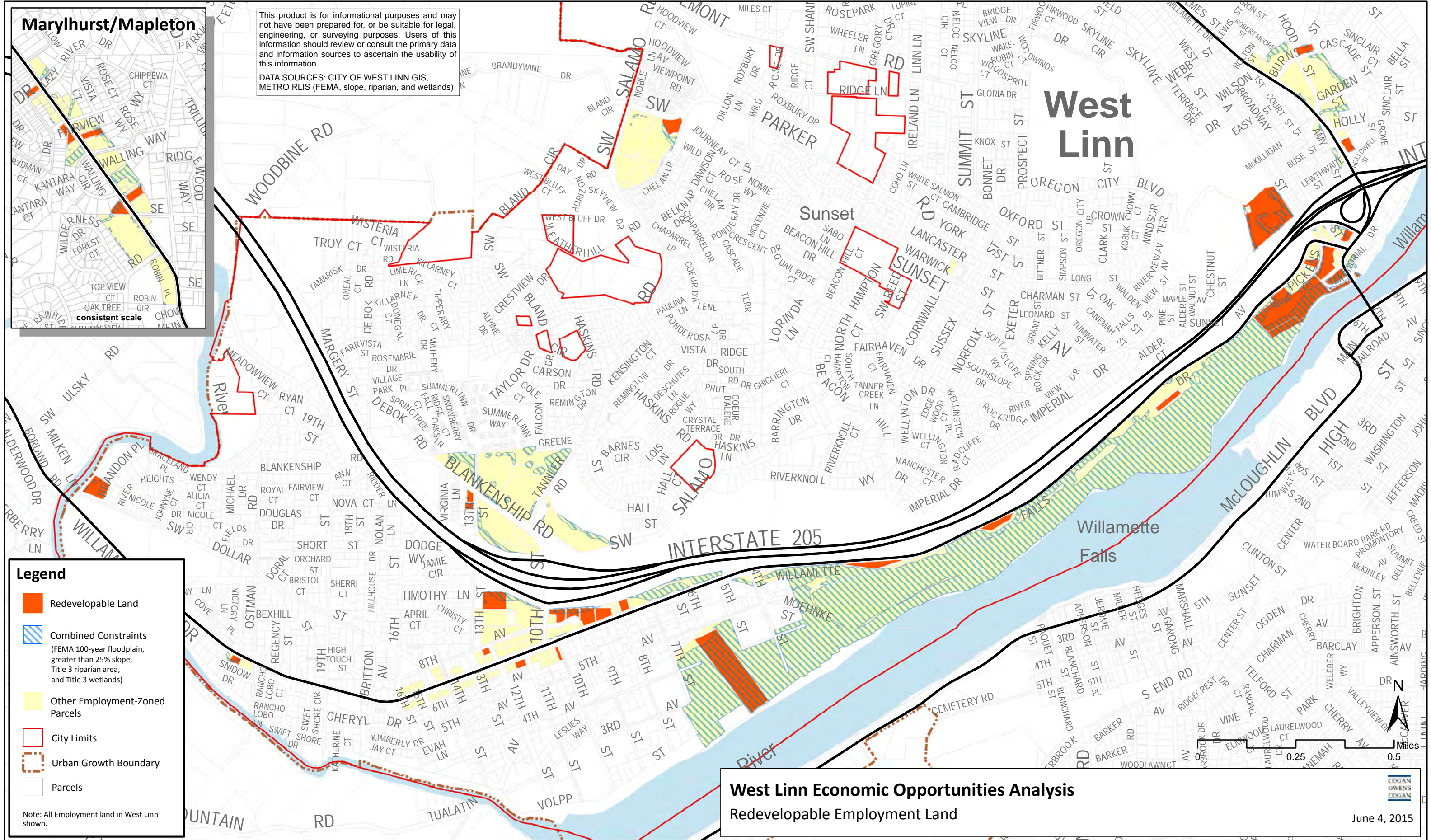


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DATA SOURCES: CITY OF WEST LINN GIS, METRO RLIS (FEMA, slope, riparian, and wetlands)



Legend

- Redevelopable Land
- Combined Constraints (FEMA 100-year floodplain, greater than 25% slope, Title 3 riparian area, and Title 3 wetlands)
- Other Employment-Zoned Parcels
- City Limits
- Urban Growth Boundary
- Parcels

Note: All Employment land in West Linn shown.

West Linn Economic Opportunities Analysis Redevelopable Employment Land



June 4, 2015

