

**ECONOMIC OPPORTUNITIES ANALYSIS
FOR THE CITY OF CONDON**

AND

**BUILDABLE LANDS INVENTORIES
FOR THE CITIES OF ARLINGTON AND LONEROCK**

JUNE 2019



Prepared for the
Oregon Department of Land Conservation and Development

ANDERSON PERRY & ASSOCIATES, INC.
La Grande, Redmond, and Hermiston, Oregon
Walla Walla, Washington

and

FCS GROUP
Lake Oswego, Oregon

**ECONOMIC OPPORTUNITIES ANALYSIS
FOR THE CITY OF CONDON**

AND

**BUILDABLE LANDS INVENTORIES
FOR THE CITIES OF ARLINGTON AND LONEROCK**

JUNE 2019

FINAL DRAFT

ANDERSON PERRY & ASSOCIATES, INC.
La Grande, Redmond, and Hermiston, Oregon
Walla Walla, Washington

and

FCS GROUP
Lake Oswego, Oregon

Table of Contents

Executive Summary	ES-1
Section 1.0 - Introduction	1-1
1.1 Project Background and Purpose.....	1-1
1.2 Organization of Report	1-1
1.3 Objectives	1-2
Section 2.0 - Emerging Market Trends	2-1
2.1 Introduction	2-1
Section 3.0 - Buildable Employment Lands Inventories	3-1
3.1 Introduction	3-1
3.2 Purpose of Buildable Land Supply.....	3-1
3.3 Oregon Regulatory Requirements for Buildable Employment Lands Inventories.....	3-1
3.4 Employment Lands Mapping Methodology	3-1
3.4.1 Determination of Developed, Vacant, and Redevelopable Employment Lands	3-2
3.5 City of Condon Buildable Employment Lands Inventory	3-3
Section 4.0 - Economic Opportunities	4-1
4.1 Introduction	4-1
4.2 Requirements for Assessment of Community Economic Development Potential	4-1
4.3 Recommended Target Industries for the City of Condon	4-1
4.3.1 Value-added Agriculture, Light Manufacturing, and Value-added Waste Management Defined.....	4-2
4.4 Assessment of Community Economic Development Potential for the City of Condon based on Target Industries	4-4
4.4.1 Value-added Agriculture/Light Manufacturing.....	4-4
4.4.2 Value-added Waste Management.....	4-5
4.4.3 Renewable Energy	4-7
4.4.4 Specialty Trade Contractors.....	4-8
4.4.5 Tourism and Recreation.....	4-9
4.5 Reconciliation of Land Demand and Supply and Factors Affecting Development	4-9
4.5.1 Reconciliation of Land Demand and Supply for Condon	4-9
4.5.2 Factors Affecting Development of Employment Lands in Condon.....	4-11
Section 5.0 Draft Economic Policy Recommendations	5-1
5.1 Introduction	5-1
5.2 Recommended Amendments to Current Economic Development Policies; Recommended New Policies; Objectives and Strategies	5-1
5.3 Draft Recommended Next Steps	5-3

TABLES

Table 3-1 Airport Development Buildable Lands Inventory.....	3-3
Table 3-2 Commercial Buildable Lands Inventory.....	3-4
Table 3-3 Industrial Buildable Lands Inventory.....	3-5

Table 3-4 Public Employment Buildable Lands Inventory.....	3-6
Table 4-1 Summary of Condon’s Site Requirements	4-9
Table 4-2 Summary of Condon’s Buildable Lands Inventory	4-10
Table 4-3 Summary of Condon’s Employment Land Needs and Supply	4-10

FIGURE

Figure 3-1 City of Condon - Buildable Employment Lands Inventory Map

APPENDICES

- Appendix A Cities of Gilliam County EOA Market Opportunities Analysis and Employment Lands Needs, Prepared by FCS GROUP
- Appendix B Interviews with City Officials for Lonerock and Arlington to Gauge Level of Satisfaction with Existing Employment Land Supplies

Executive Summary

In 2018, the Oregon Department of Land Conservation and Development (DLCD) received \$300,000 from the Oregon Legislature via House Bill (HB) 5201 for economic development planning assistance “for the purpose of providing technical assistance grants to eastern Oregon counties for economic opportunity analyses (EOAs).” The purpose of an EOA is to ensure that a city will have an adequate available land supply to support economic growth. An EOA includes analysis of local and regional economic trends, evaluation of the community’s opportunities and barriers to economic growth, and a determination of the types and amounts of land and infrastructure needed to support expected employment. Implementation of HB 5201 by DLCD became known as the Eastern Oregon Economic Development Project. Cities and counties were invited to apply for technical assistance, and in August 2018, Gilliam County and the City of Condon were selected to receive funding assistance. The Cities of Arlington and Lonerock chose not to participate in the project. As a result, the project became locally referred to as the City of Condon EOA Project. Because EOAs apply only to areas within cities’ urban growth boundaries (UGB), Gilliam County served in a coordinating role for the project.

Anderson Perry & Associates, Inc. (AP) was selected as the consultant to provide technical planning assistance for the City of Condon EOA project. AP subcontracted with FCS GROUP to prepare the local, regional, state, and national economic trends and site needs analysis portion of the project, which can be found in Section 2.0 of this report and in Appendix A. Based on these trends, FCS GROUP found the following industries offered the City of Condon its best opportunities to target new businesses or to support expansion of existing businesses: value-added agriculture and light manufacturing; value-added waste management; renewable energy; tourism and recreation; and specialty trade contractors. Site needs, or the types and amounts of land needed by the City to accommodate projected growth and expansion of businesses associated with these target industries for the 20-year planning period, from 2019 to 2039, were identified. These site needs became the basis for determining, after a review of the existing supply of vacant buildable and redevelopable employment-type lands, whether Condon is expected to have an adequate land supply to meet these industry needs, as discussed in Section 3.0 of this report.

Based on the information and analyses contained in Sections 2.0 and 3.0 of this report, Section 4.0 sets out to reconcile whether the City of Condon is expected to have an adequate buildable land supply within its UGB that can accommodate projected growth and expansion for the target industries. AP found that Condon is expected to have a surplus of commercial and industrial land within its UGB during the 20-year planning period. The City owns approximately 7 acres south of the Condon State Airport zoned for public use that can also be made available for industrial use, if needed.

An assessment of community economic development potential based on community strengths and locational factors in relation to each target industry is also contained in Section 4.0. Condon has potential to benefit from businesses or industries associated with value-added agriculture and light manufacturing, especially light manufacturing or processing that involves adding value to agricultural products produced in Gilliam County and the region. Hemp and hemp-related products may provide especially promising opportunities for Gilliam County and Condon. Waste management remains a strong industry in Gilliam County, with opportunities related to recycling, energy production, hazardous waste management, and composting. Renewable energy in the form of wind farms and solar farms appears to be a growing industry in the County. The challenge for Condon will be determining how to tap into these industries. Construction and maintenance of these facilities will continue to contribute to the City’s

economy whether directly or indirectly through support activities. Recreational assets in the County and region, such as the John Day River and Cottonwood Canyon, provide attractions for boating, fishing, hiking, camping, sight-seeing, and other recreational activities that should provide opportunities for new or existing businesses in the tourism and recreation industry. With the right approach and strategies, Condon could have potential to become more of a destination for artisans seeking quality of life factors to develop their crafts, which would, in turn, bring more visitors to the area.

Factors that tend to affect economic development in small cities in eastern Oregon, both positively and negatively, are briefly discussed in Section 4.0 of this report. These factors include environment and topography; location and lot sizes; access and public services; public water, wastewater, and storm drainage system capacities; ownership (of vacant buildable land supply); workforce housing; fiber optic broadband; and climate change. Condon has a historic downtown and wide-open views that help give it a certain quality of life feel. The City has more than adequate capacities in its public water and wastewater systems to accommodate projected growth. Like many other cities in the region, however, Condon has a severe lack of affordable workforce housing, which is a limitation for attracting new businesses to the community. Condon has worked with Gilliam County to bring high-speed fiber optic cable to the community, which is vital to attracting new businesses and helping existing businesses expand.

Throughout the entire planning process, advisory committee and public meetings were held to review information and analyses provided by AP and FCS GROUP. Feedback from these meetings helped ensure that issues important to the community were addressed and assure a reasonable level of accuracy in the information provided to guide policy development.

Amendments to the City's Comprehensive Land Use Plan policies are recommended in Section 5.0 of this report and are intended to help the City implement its economic development plan. Recommended objectives and strategies are also included to help guide specific actions and provide measures for implementation of certain economic development policies.

Although the Cities of Arlington and Lonerock chose not to participate, AP identified the vacant buildable and redevelopable commercial, industrial, and other employment-type lands for each city, which are included in Appendix B of this report. Interviews with elected and/or appointed representatives for each city were conducted to assess the level of satisfaction by each city regarding its buildable vacant commercial and industrial land inventories. The City of Arlington updated the Goal 9 Economic Development element in its Comprehensive Land Use Plan in 2015, which included updates to its buildable vacant commercial and industrial land inventories. As a result, Arlington indicated it was satisfied with its buildable vacant commercial and industrial land inventories. The City of Lonerock, with a total population of 20, does not have any land planned or zoned for commercial or industrial use. All platted land within the City is zoned for residential use. A considerable amount of land within the City is used in conjunction with a couple of large ranches in the area. Gilliam County conducts Lonerock's land use planning due to the City's small size. Interviewees for Lonerock expressed that, for a number of reasons, a business in Lonerock would not be economically viable. These City representatives felt the citizens of Lonerock are satisfied with not having any commercial or industrial land within the UGB.

Section 1.0 - Introduction

1.1 Project Background and Purpose

The economic recovery after the downturn of 2008-09 has not lifted in all regions of Oregon. Portions of eastern Oregon have not experienced the level of growth in jobs and trade as seen in many other parts of the state. At the same time, many of the local governments in this region have not had adequate financial and human resources to keep their comprehensive land use plans current, leading to possible missed opportunities because a community was not ready for development.

The Oregon Department of Land Conservation and Development (DLCD) contracted with Anderson Perry & Associates, Inc. (AP) to develop Economic Opportunities Analyses (EOAs) as part of their Eastern Oregon Economic Development Project. Gilliam County led this effort, inviting all the cities in the County to participate. Having recently completed industrial lands work funded by DLCD, Arlington declined to participate. The City of Lonerock does not have any employment lands zoned and also declined to participate. Based on their scope of work with the DLCD, AP provided non-participating cities with a draft Buildable Lands Inventory and attempted to have qualitative discussions with city leadership to determine their satisfaction with their existing employment lands. The results of the conversations will be included in an Appendix in the final EOA for Gilliam County.

This project provided assistance to update economic development plans for the participating City of Condon, which has experienced lagging growth in population and employment. The City of Condon is hereby provided with an updated EOA in accordance with Oregon Administrative Rules (OAR) 660-009-0015. DLCD staff will work with City of Condon leadership to adopt this updated analysis and associated policies into its comprehensive plan following completion of this project.

1.2 Organization of Report

This EOA report is divided into five main sections with an Executive Summary. Specifically, the EOA report includes the following:

Section 1 - Introduction provides a brief overview of the background and purpose for the project, organization of the report, and the objectives the EOA is intended to meet.

Section 2 - Emerging Market Trends, prepared by FCS GROUP under contract with AP, identifies major categories of industrial or other employment uses that could reasonably be expected to locate or expand in the planning area based on information about national, state, regional, county, or local economic trends. This review of trends is the principal basis for estimating future industrial and other employment uses. The number of sites by type reasonably expected to be needed to accommodate expected employment growth is projected based on site characteristics typical of expected uses.

Section 3 - Buildable Employment Lands Inventories develops inventories of vacant and redevelopable lands within the planning area designated for industrial or other employment use in accordance with OAR 660-009-0015(3).

Section 4 - Economic Opportunities conducts an assessment of Community Economic Development Potential for the City of Condon as described in OAR 660-009-0015(4). A draft assessment, summary of

trends, and inventory information were presented to the local advisory committee for review and feedback, and to the community at a public meeting. Revisions from these meetings were incorporated into the draft EOA.

Section 5 - Draft Economic Policy Recommendations provides recommended economic policies, objectives, and strategies for the City of Condon to consider adopting to address barriers to economic development and guide City economic development efforts.

1.3 Objectives

The EOA prepared in this report is intended to meet the following objectives:

1. Develop economic trends analyses upon which to identify target industries. Target industries should offer the City of Condon the best opportunities upon which to focus its economic development efforts to attract new businesses and expand existing businesses.
2. Identify site requirement needs for the types of businesses associated with target industries likely to locate in the planning area for the City.
3. Develop a Buildable Employment Lands Inventory for the City to assess whether the current available employment land supply is sufficient to meet the site requirement needs for projected new development during the 20-year planning period.
4. Reconcile projected employment land needs with available land supply. Where land supply is found to be deficient, the City will need to consider conducting further research and analysis to acquire the additional needed employment land, whether by rezoning land currently in the City's urban growth boundary (UGB) or expanding the UGB.
5. Provide an assessment of community economic development potential based on information from each of the above objectives and from environmental, location, or other development factors that create distinct advantages or disadvantages to economic development efforts.

Section 2.0 - Emerging Market Trends

2.1 Introduction

Information about emerging market trends was prepared by FCS GROUP under contract with Anderson Perry & Associates, Inc. FCS GROUP identified the major categories of industrial and other employment uses (“target industries”) that could reasonably be expected to locate or expand in the planning area for the City of Condon based on information about national, state, regional, county, or local trends. FCS GROUP’s review of these trends is the principal basis for estimates of future industrial and other employment uses. A use or category of use could reasonably be expected to expand or locate in the City’s planning area if the area possesses the appropriate locational factors for the use or category of use. FCS GROUP analyzed trends and established employment projections to determine the percentage of employment growth reasonably expected to be captured within the City’s planning area. Based on FCS GROUP’s analysis and discussion with Condon advisory committee members, the target industries for Gilliam County and the City of Condon include:

- Value-added Agriculture/Light Manufacturing
- Value-added Waste Management
- Tourism and Recreation
- Renewable Energy
- Specialty Trade Contractors

FCS GROUP further identified the number of sites by type reasonably expected to be needed to accommodate employment growth for the City of Condon based on the site characteristics typical of projected uses by examining existing firms in the planning areas to identify the types of sites that may be needed for expansion. Industrial or other employment uses with compatible site characteristics may be grouped together into common site categories.

- Industrial Site Requirements: Three 2-acre sites and two 4-acre sites
- Commercial Site Requirements: Flex buildings on 6 acres
- Other Site Requirements: Downtown infill and home-based occupations

This analysis informed the reconciliation of demand for employment and current employment land supply found in Section 4.5.

Please refer to Appendix A of this report for the *Cities of Gilliam County EOA Market Opportunities Analysis and Employment Land Needs*, prepared by FCS GROUP, for a detailed review and analysis of market trends and site requirements for the City of Condon.

Section 3.0 - Buildable Employment Lands Inventories

3.1 Introduction

This section presents data and information pertaining to Condon's employment land supply based on current comprehensive plan and zoning designations within the planning area for the City. Employment lands consist of those properties included in City's airport development, commercial, industrial, and public zones, while the planning area is defined as all land within the city limits and urban growth boundary (UGB). A map of employment lands created using Esri's ArcGIS is presented showing the City's vacant, developed, and redevelopable commercial and industrial land supplies, along with tables identifying individual tax lots included in the Buildable Lands Inventories (BLIs).

3.2 Purpose of Buildable Land Supply

The purpose of the BLI for employment lands for the City of Condon is to identify the types, sizes, and total amount of vacant and redevelopable industrial, commercial, or other employment-type land within the City's UGB. This information is used in Section 4, along with the employment land needs identified in Section 2, to reconcile whether reasonably sufficient land is available in the City to accommodate projected economic expansion and growth over the designated 20-year planning period, from 2019 to 2039.

3.3 Oregon Regulatory Requirements for Buildable Employment Lands Inventories

The requirement to include an inventory of vacant and redevelopable industrial and other employment lands when conducting an Economic Opportunities Analysis is contained under Oregon Administrative Rules (OAR) 660-009-0015(3). An inventory is required to include a description of the site characteristics of vacant or developed sites within each industrial, commercial, or other zoning district that provide significant employment opportunities. While OAR 660-009-0015(3)(a) indicates "vacant and developed" sites, the definition of "developed land" under OAR 660-009-0005 clearly refers to non-vacant industrial and employment-type lands that are likely to be *redeveloped* within the 20-year planning period. The term "redevelopable" is used, therefore, to refer to such lands to minimize the potential for confusion. Non-vacant employment lands *not* likely to be redeveloped within the 20-year planning period are discussed herein as "developed" along with "vacant" and "redevelopable" employment lands to provide a more wholistic view of the City's employment land supply. The BLI further takes into account lands that have one or more "development constraints" associated with them, as that term is defined under OAR 660-009-0005(2).

3.4 Employment Lands Mapping Methodology

The City of Condon adopted its current Comprehensive Plan Map/Zoning Map in 2012. Condon's zoning designations are the same as its Comprehensive Plan Map designations. The adopted map was used as the starting point for identifying all properties with zoning intended to accommodate economic

development. Within the City of Condon's UGB, the following zoning designations were identified as employment-type zones:

- Airport Development (AD) Zone
- Commercial (C) Zone
- Industrial (I) Zone
- Public (P) Zone

No other employment-type zoning designation was identified for the City.¹

Using Esri's ArcGIS, Anderson Perry & Associates, Inc. (AP) created a tax lot-based GIS map of these employment-type lands within Condon's UGB. GIS shapefiles with associated assessor's data obtained from Lane County, which Gilliam County contracts with to maintain its County Assessor's information, were utilized to create the initial employment lands map. AP then incorporated known plan amendment/zone changes approved by the City since adoption of the Comprehensive Plan Map/Zoning Map to reflect the most up-to-date GIS employment lands map and inventory possible. Road areas contained within the employment-type zones were then removed from the GIS data layer to reflect a more accurate land supply within each zone.

3.4.1 Determination of Developed, Vacant, and Redevelopable Employment Lands

AP analyzed the Gilliam County Assessor's data associated with each tax lot.² Using the County Assessor's data, AP used the standard assessment model comparing real market improvement value (RMIV) to real market land value (RMLV) for each tax lot as a first step in determining whether each tax lot was vacant, developed, or redevelopable. Where the RMIV was shown as zero dollars compared to the RMLV, the tax lots were considered vacant. Where the RMIV was shown as greater than the RMLV, the property was considered to be developed. For those tax lots where the RMIV was greater than zero but less than the RMLV, the tax lot was considered redevelopable. If a tax lot was developed but still contained significant vacant area suitable for new development, the vacant area was added to the vacant lands inventory.

In a few cases, the RMIV was low (generally less than \$15,000) and only slightly more than the RMLV. In these cases, additional consideration was given to the nature of the existing use and whether the use seemed likely to be redeveloped during the 20-year planning period. As an example, a few existing dwellings, primarily older mobile homes, on commercially zoned lots fit this description. If the tax lot appeared to be greatly underdeveloped compared to the commercial or industrial uses permitted in the zone, then the tax lot was classified as redevelopable rather than developed.

¹ The Economic Trends Analysis identified home-based occupations as a potential economic development objective. Home occupations tend to be permitted as conditional uses in residential zones; however, residential zones are not considered employment-type zones. Consideration should be given to the city's policies and home occupation standards for how best to address home-based occupations as an economic development objective.

² It should be noted that tax lot sizes reflected in the County Assessor's shapefiles tend to differ from those shown on County Assessor paper maps.

Draft iterations of the BLI maps were reviewed by a local advisory committee through a series of meetings, and by the public through a public meeting held March 19, 2019. The final BLI map shown on Figure 3-1 reflects changes from these meetings.

From the draft BLI map, an inventory of vacant and redevelopable employment lands by individual tax lot was created in an Excel table for further analysis of lot sizes and physical constraints, such as flood zones, wetlands, steep slopes, or other environmental or topographical factors. Each tax lot was reviewed based on these factors to assess its suitability for meeting projected employment land needs for the 20-year planning period.

3.5 City of Condon Buildable Employment Lands Inventory

Figure 3-1 shows all of the identified employment lands within Condon as developed, redevelopable, or vacant. Based on the lot size values contained in the GIS data layer for the BLI map, the total area within each of Condon’s employment-type zones is indicated below:

- Airport Development (AD) Zone - 9.09 acres
- Commercial (C) Zone - 64.98 acres
- Industrial (I) Zone - 49.14 acres
- Public (P) Zone - Not determined³

Tables 3-1 through 3-4 below include an inventory and total acres of only the vacant and redevelopable tax lots in each of Condon’s employment-type zones. Within each of the tables that follow in this section, “constrained vacant acres” include land found to have development constraints as defined in OAR 660-009-0005(2).⁴ Like the final BLI map, Tables 3-1 through 3-4 incorporate changes from the local advisory committee and public meetings.

**TABLE 3-1
 AIRPORT DEVELOPMENT BUILDABLE LANDS INVENTORY**

Map (T-R-S)	Tax Lot	Zone	Category	Gross Vacant Acres	Environmental or Physical Development Constraint	Minus Constrained Vacant Acres	Net Buildable Vacant Acres	Plus Redevelopable Acres	Total Buildable Vacant Acres
04S21E02	500	AD	Vacant	7.74	N/A	N/A	7.74	N/A	7.74
04S21E02C	600	AD	Vacant	1.35	N/A	N/A	1.35	N/A	1.35
Total Airport Development Acres				9.09	N/A	N/A	9.09	N/A	9.09

T-R-S = Township-Range-Section

³ In Condon, land is zoned Public if it is owned by a federal, state, county, city, or nonprofit agency. The future land needs of public agencies were not considered in this report even though public agencies tend to make up a significant percentage of total local employment.

⁴ Under OAR 660-009-0005(2) vacant land that is constrained has one or more factors associated that temporarily or permanently limit or prevent use of the land for economic development. Development constraints include, but are not limited to, wetlands, environmentally sensitive areas such as habitat, environmental contamination, slope, topography, cultural and archeological resources, infrastructure deficiencies, parcel fragmentation, or natural hazard areas.

As shown on Table 3-1 above, Condon has 9.09 acres in the Airport Development zone that are vacant, no acres that are unsuitable for development, and no acres that are redevelopable, leaving Condon with a total of 9.09 buildable acres in its Airport Development zone.

Table 3-2 below shows Condon with 12.08 acres in the Commercial zone that are vacant, 4.35 acres that are unsuitable for development, and 2.88 acres that are redevelopable, leaving Condon with a total of 10.61 buildable acres in its Commercial zone.

**TABLE 3-2
 COMMERCIAL BUILDABLE LANDS INVENTORY**

Map (T-R-S)	Tax Lot	Zone	Category	Gross Vacant Acres	Environmental or Physical Development Constraint	Minus Constrained Vacant Acres	Net Buildable Vacant Acres	Plus Redevelopable Acres	Total Buildable Vacant Acres
04S21E10AC	401	C	Redevelopable					0.25	0.25
04S21E10AC	3300	C	Redevelopable					0.34	0.34
04S21E10AC	3900	C	Redevelopable					0.23	0.23
04S21E10BC	2800	C	Redevelopable					0.25	0.25
04S21E10BD	4500	C	Redevelopable					0.11	0.11
04S21E10BD	5700	C	Redevelopable					0.21	0.21
04S21E10CA	1600	C	Redevelopable					0.23	0.23
04S21E10CA	8901	C	Redevelopable					0.05	0.05
04S21E10CD	701	C	Redevelopable					0.11	0.11
04S21E10CD	800	C	Redevelopable					0.11	0.11
04S21E10DB	8102	C	Redevelopable					0.14	0.14
04S21E10DB	8502	C	Redevelopable					0.09	0.09
04S21E10DB	8505	C	Redevelopable					0.21	0.21
04S21E10DB	9400	C	Redevelopable					0.32	0.32
04S21E10DC	601	C	Redevelopable					0.23	0.23
04S21E10CD	2700	C	Partially Vacant	0.17	East Half is Vacant		0.17		0.17
04S21E10AC	1600	C	Vacant	0.11			0.11		0.11
04S21E10AC	3200	C	Vacant	0.11			0.11		0.11
04S21E10AC	3700	C	Vacant	0.11			0.11		0.11
04S21E10AC	3800	C	Vacant	0.23			0.23		0.23
04S21E10AC	4100	C	Vacant	0.23			0.23		0.23
04S21E10BC	2900	C	Vacant	1.50			1.50		1.50
04S21E10BD	5500	C	Vacant	0.11			0.11		0.11
04S21E10BD	5600	C	Vacant	0.03			0.03		0.03
04S21E10BD	5602	C	Vacant	0.07			0.07		0.07
04S21E10BD	5900	C	Vacant	0.23			0.23		0.23
04S21E10BD	6101	C	Vacant	0.11			0.11		0.11
04S21E10BD	6301	C	Vacant	0.23			0.23		0.23
04S21E10BD	6500	C	Vacant	0.11			0.11		0.11
04S21E10BD	7401	C	Vacant	0.11			0.11		0.11
04S21E10BD	7800	C	Vacant	0.11			0.11		0.11
04S21E10BD	8200	C	Vacant	0.06			0.06		0.06
04S21E10BD	8201	C	Vacant	0.11			0.11		0.11
04S21E10BD	8202	C	Vacant	0.06			0.06		0.06
04S21E10BD	8500	C	Vacant	0.34			0.34		0.34
04S21E10BD	8600	C	Vacant	0.11			0.11		0.11
04S21E10BD	9000	C	Vacant	0.23			0.23		0.23
04S21E10CA	1101	C	Vacant	0.06			0.06		0.06
04S21E10CA	7300	C	Vacant	0.09			0.09		0.09
04S21E10CA	7301	C	Vacant	0.08			0.08		0.08

04S21E10CA	7800	C	Vacant	0.07			0.07		0.07
04S21E10CA	8300	C	Vacant	0.39			0.39		0.39
04S21E10CA	8800	C	Vacant	0.23			0.23		0.23
04S21E10CA	8900	C	Vacant	0.07			0.07		0.07
04S21E10CA	9000	C	Vacant	0.25			0.25		0.25
04S21E10CA	9201	C	Vacant	0.11			0.11		0.11
04S21E10CA	9500	C	Vacant	0.17			0.17		0.17
04S21E10CA	9700	C	Vacant	0.11			0.11		0.11
04S21E10CA	10201	C	Vacant	0.20			0.20		0.20
04S21E10CA	13900	C	Vacant	0.11			0.11		0.11
04S21E10DB	8200	C	Vacant	0.10			0.10		0.10
04S21E10DB	8500	C	Vacant	0.14			0.14		0.14
04S21E10DB	8506	C	Vacant	0.11			0.11		0.11
04S21E10DB	9300	C	Vacant	0.21			0.21		0.21
04S21E10DB	9401	C	Vacant	0.32			0.32		0.32
04S21E10DB	9600	C	Vacant	0.32			0.32		0.32
04S21E10DC	600	C	Vacant	0.11			0.11		0.11
04S21E10DC	300	C	Unsuitable	1.03	Flood Zone A	1.03			
04S21E10BC	2400	C	Unsuitable	0.50	Flood Zone A	0.50			
04S21E10BC	3400	C	Unsuitable	2.13	Flood Zone A	2.13			
04S21E10DB	9200	C	Unsuitable	0.69	Flood Zone A	0.69			
Total Commercial Acres				12.08		4.35	7.73	2.88	10.61

Table 3-3 below shows Condon with 20.35 vacant acres in the Industrial zone, no acres that are unsuitable for development, and 7.06 acres that are redevelopable, giving Condon a total of 27.41 buildable acres in the Industrial zone.

**TABLE 3-3
 INDUSTRIAL BUILDABLE LANDS INVENTORY**

Map (T-R-S)	Tax Lot	Zone	Category	Gross Vacant Acres	Environmental or Physical Development Constraint	Minus Constrained Vacant Acres	Net Buildable Vacant Acres	Plus Redevelopable Acres	Total Buildable Vacant Acres
04S21E10BA	7000	I	Redevelopable					0.73	0.73
04S21E03DC	700	I	Redevelopable					0.96	0.96
04S21E10AC	1400	I	Redevelopable					0.23	0.23
04S21E10BA	6900	I	Redevelopable					4.61	4.61
04S21E10BB	100	I	Redevelopable					0.53	0.53
04S21E	400	I	Vacant	4.59			4.59		4.59
04S21E03DC	100	I	Vacant	1.63			1.63		1.63
04S21E03DC	200	I	Vacant	5.16			5.16		5.16
04S21E03DC	400	I	Vacant	1.93			1.93		1.93
04S21E03DC	600	I	Vacant	0.79			0.79		0.79
04S21E10AB	200	I	Vacant	0.51			0.51		0.51
04S21E10AB	1900	I	Vacant	4.26			4.26		4.26
04S21E10AC	1100	I	Vacant	1.03			1.03		1.03
04S21E10AC	1300	I	Vacant	0.11			0.11		0.11
04S21E10BA	100	I	Vacant	0.34			0.34		0.34
Total Industrial Acres				20.35			20.35	7.06	27.41

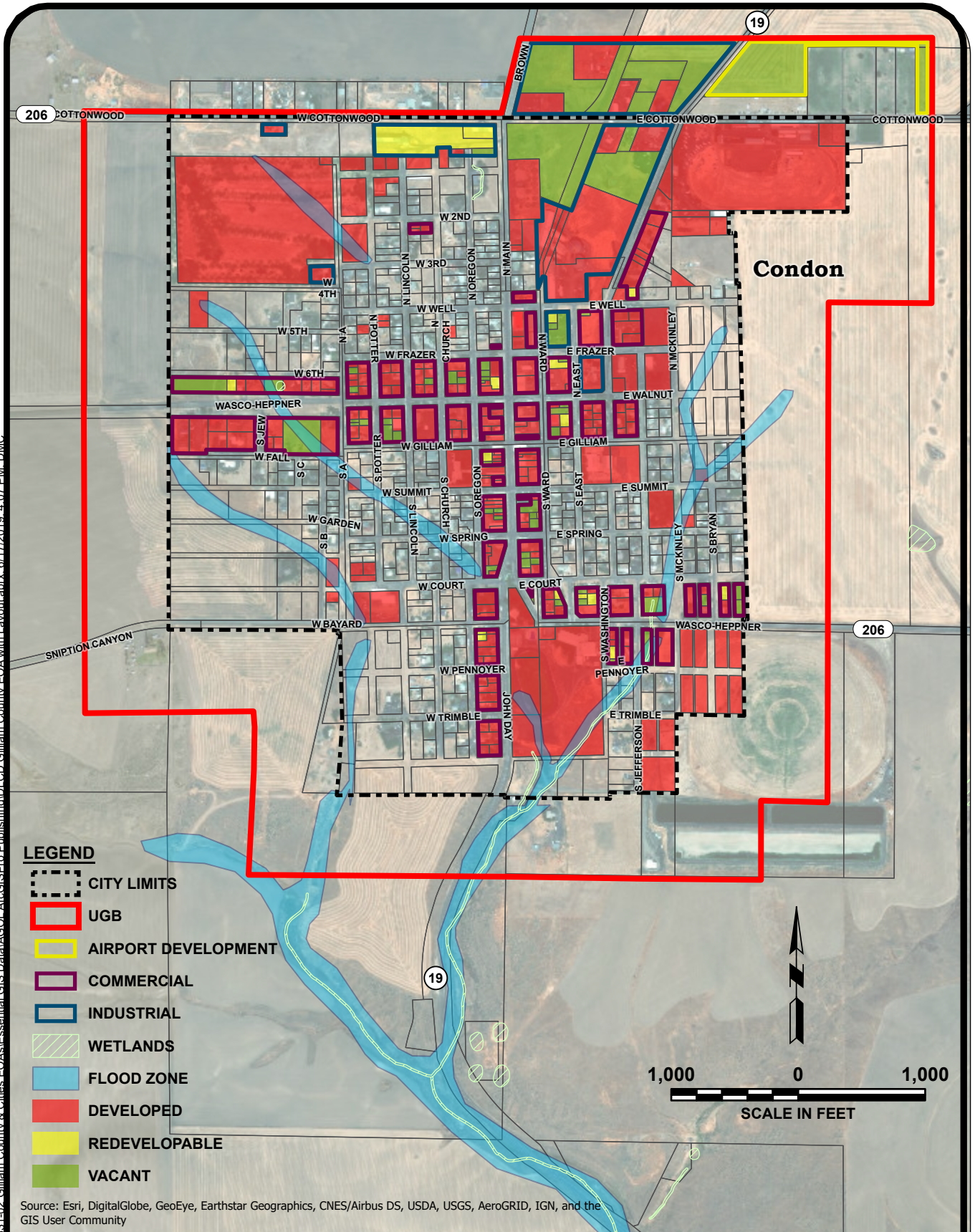
As shown on Table 3-4 below, Condon has 7.11 acres in the Public zone that are vacant that could be considered for future industrial development. The vacant acres inventoried reflect only a portion of the total area in the Public zone. In Condon, land is zoned Public if it is owned by a federal, state, county, city, or nonprofit agency. The future land need of public agencies was not studied as part of this report.

However, the City of Condon owns the 7.11 vacant acres of land and indicated it could be made available for industrial development, if needed.

**TABLE 3-4
 PUBLIC EMPLOYMENT BUILDABLE LANDS INVENTORY**

Map (T-R-S)	Tax Lot	Zone	Category	Gross Vacant Acres	Environmental or Physical Development Constraint	Minus Constrained Vacant Acres	Net Buildable Vacant Acres	Plus Redevelopable Acres	Total Buildable Vacant Acres
04S21E10AB	400	P	Vacant	1.60	N/A	N/A	1.60	N/A	1.60
04S21E10AB	500	P	Vacant	5.51	N/A	N/A	5.51	N/A	5.51
Total Public Acres				7.11	N/A	N/A	7.11	N/A	7.11

\\LGSVR\GIS\projects\DL\CD\1831_02_Gilliam County & Cities EOAs\Essential GIS Data\AGOL-ArcGISPro-Publishing\DL_CD_Gilliam County EOA with Layout.aprx - 6/17/2019 - 4:07 PM - DMC



**OREGON DEPARTMENT OF LAND
CONSERVATION AND DEVELOPMENT**
GILLIAM COUNTY CITIES ECONOMIC OPPORTUNITIES ANALYSIS

**CITY OF CONDON - BUILDABLE
EMPLOYMENT LANDS INVENTORY MAP**

**FIGURE
3-1**

Section 4.0 - Economic Opportunities

4.1 Introduction

This section presents the information required for preparing an Assessment of Community Economic Development Potential for the City of Condon, as required under Oregon Administrative Rules (OAR) 660-009-0015(4).

The types of uses that could reasonably be expected to locate or expand within Condon's planning area are identified and assessed in relation to the recommended target industries. These industries and the types of uses identified present the most favorable opportunities for the City to focus its economic development efforts.

Condon's projected commercial, industrial, and other employment land needs (i.e., demand) are then reconciled with its available land supplies to determine whether or not the City is expected to have enough land available during the 20-year planning period to meet its projected land needs. Factors (good or bad) that impact economic development efforts that are typical for small cities in eastern Oregon are then briefly assessed.

4.2 Requirements for Assessment of Community Economic Development Potential

The final step in developing an Economic Opportunities Analysis under OAR 660-009 is to conduct an assessment of community economic development potential. An assessment of community economic development potential under OAR 660-009-0015(4) is required to:

- Estimate the types and amounts of industrial and other employment uses likely to occur in the planning area based on information and findings from previous steps;
- Reconcile existing land supply with projected land need for employment use;
- Consider each planning area's relevant economic advantages and disadvantages including, but not limited to, such factors as location, size, and buying power of markets, transportation facilities, public facilities and utilities, labor market factors, and others.

As noted during development of the Buildable Lands Inventory (BLI), the planning area for the City of Condon includes all land within its city limits and urban growth boundary (UGB).

4.3 Recommended Target Industries for the City of Condon

The following industries were identified by FCS GROUP during its review of economic trends as the top five target industries that provide the best opportunities for new businesses or expansion of existing businesses in the City of Condon:

- Value-added Agriculture/Light Manufacturing
- Value-added Waste Management
- Tourism and Recreation
- Renewable Energy
- Specialty Trade Contractors

During review of FCS GROUP's economic trends analysis, local advisory committee members felt that light manufacturing should be included along with value-added agriculture to provide a broader range of business and industry for the City to include in its planning efforts.

In addition to the above target industries, the City of Condon recently secured fiber optic broadband service to the community to better serve existing homes and businesses and to provide additional incentive for new businesses and industries to locate in the area.

Gilliam County and the City of Condon are located within the federally funded Greater Eastern Oregon Economic Development District. However, Gilliam County and Condon share similar locational advantages and industries with adjacent Sherman County, which is located within the federally funded Mid-Columbia Economic Development District. Gilliam County and Condon appear to be strategically positioned to benefit from both of these economic development districts through inclusion in the planning efforts for each of these districts.

4.3.1 Value-added Agriculture, Light Manufacturing, and Value-added Waste Management Defined

Before assessing Condon's economic development potential, a brief explanation of the nature of certain target industries is provided to help understand the types of uses that could be expected to locate or expand in the area in relation to those industries.

4.3.1.1 Value-added Agriculture Defined

The U.S. Department of Agriculture Rural Development defines value-added products as follows:

- A change in the physical state or form of the product (such as milling wheat into flour or making strawberries into jam).
- The production of a product in a manner that enhances its value, as demonstrated through a business plan (such as organically produced products).
- The physical segregation of an agricultural commodity or product in a manner that results in the enhancement of the value of that commodity or product (such as an identity preserved marketing system).

As a result of the change in physical state or the manner in which the agricultural commodity or product is produced and segregated, the customer base for the commodity or product is expanded and a greater portion of revenue derived from the marketing, processing, or physical segregation is made available to the producer of the commodity or product.

One researcher⁵ described the process of adding value to agriculture as follows:

⁵ Jennifer Vandeburg, MS, Ag Economics, Community College Ag Prof, Ag in my blood and dirt on my hands, June 8, 2015.
<https://www.quora.com/profile/Jennifer-Vandeburg>

From a supply chain viewpoint, value-added happens anytime you take an ag product and do something to it that makes it more valuable to the next stage of the supply chain... That value may simply be transport to a location where the product can be used, or warehousing until a time when it can be used... The key to profitably engaging in value-added activity is to learn the supply chain for your product and then do something to your product that makes it more valuable to the stages of the chain after you... Ultimately, it is about the end consumer.

The Agriculture Marketing Resource Center at <https://www.agmrc.org/> provides a wealth of information for understanding “value-added agriculture.” The website includes a number of examples of farmers and farmers’ cooperatives adding value to their crops such as developing dry cookie mixes from homemade recipes, and producing consumer-ready frozen dough products for pizzas, cinnamon rolls, and bread.

The literature around value-added agriculture emphasizes the need for a solid business plan for financing, marketing, quality production, and distribution. Unfortunately, there is no simple formula that applies to everyone for value-added agriculture.

4.3.1.2 Light Manufacturing Defined

Light manufacturing is activity that uses partially processed materials to produce items of relatively high value per unit. Value is added by the application of skill to physical or raw materials where all processing, fabricating, assembly, or disassembly of items takes place within an enclosed building. Clothes, shoes, furniture, consumer electronics, and household items are a few examples of light manufacturing industries.⁶

4.3.1.3 Value-added Waste Management Defined

There are five types of waste management⁷:

- Liquid waste, which includes dirty water, organic liquids, wash water, waste detergents, and rain water;
- Solid rubbish, which includes plastic bags, bottles, and packaging; paper, newspapers, and cardboard; aluminum, tin, and other metals; ceramics and glass;
- Organic waste, which includes food waste, garden waste, and manure, which contribute to the production of methane;
- Recyclable rubbish, which includes solid items such as paper, metals, and furniture that can be converted into other products and used again;
- Hazardous waste, which includes all types of rubbish that are flammable, toxic, corrosive, or reactive.

⁶ <http://itsallaboutbusiness.com/Manufacturing.htm>.

⁷ <https://4waste.com.au/rubbish-removal/5-types-waste-know/>

Different waste management processes have been developed by various waste management companies to add economic value to waste management that also provides greater protection for the environment.

Waste management companies and their processes used in Gilliam County are discussed under the following section, along with additional value-added waste management that may provide additional opportunities for Condon and Gilliam County.

4.4 Assessment of Community Economic Development Potential for the City of Condon based on Target Industries

An assessment of Condon's economic development potential is discussed below in relation to each of the recommended target industries. As noted by FCS GROUP during its review of economic trends, businesses that benefit from interaction across multiple sectors will present significant economic opportunities for Condon and Gilliam County. Gilliam County's waste management and agriculture industries make up the largest portions of its industrial sector. As these industries thrive, opportunities exist to benefit from other sectors, such as services related to the support and maintenance of agriculture production facilities, value-added waste management facilities, and related supply chains.

4.4.1 Value-added Agriculture/Light Manufacturing

4.4.1.1 Grain

Grain farming, primarily wheat production, is the second largest industry in Gilliam County in terms of its impact on the economy and the number of jobs. Grain farming contributed more than \$15 million to the local economy and employed 114 people in 2016.

Mid-Columbia Producers (MCP), which is headquartered in the City of Moro, maintains facilities in the City of Condon. MCP provides a number of value-added services for grain growers, including market research, transportation, storage, seed supply, and fuel delivery. These types of value-added services cover the most basic needs of grain farmers within Gilliam County. Changes and innovations have occurred over the years in how these services have been provided with improvements in technology and transportation, but the basic service needs have largely remained the same.

To benefit from value-added grain production, the industry must continually explore markets for processed grain products that offer added value along the supply chain, or to the end consumer. Facilities to develop market-viable grain products will provide Condon with its best opportunities to create new industries and jobs from grain produced in the County.

4.4.1.2 Hemp

A relatively new agricultural commodity that appears to have tremendous potential for growth and job creation is the growing and processing of hemp. Hemp is actually one of the oldest plants cultivated by man but was banned in the U.S. in 1937 under the Controlled Substances Act due to its close relationship to cannabis, also known as

marijuana. Hemp is considered “new” because it was delisted only in December 2018 as a Schedule I Controlled Substance by the federal government. The delisting allows hemp farmers to obtain federal crop insurance and bank financing, which is crucial to starting or maintaining any type of agricultural crop production. Hemp growers and processors are required to obtain a permit from the Oregon Department of Agriculture prior to start of operations.

Hemp can be used in making a wide variety of products including clothes, ropes, food products, medicinal products, paper, bio-fuel, construction materials, and a multitude of other products. There seems little doubt that with the legalization of hemp, much more research will be conducted into new uses for this versatile plant.

The real demand for hemp currently stems from the production of cannabidiol products, which are believed by many to help relieve pain, reduce anxiety and depression, and have other health-related benefits. The low tetrahydrocannabinol content in hemp (0.3 percent or less) means it is incapable of producing the “high” associated with cannabis.

A good example is the hemp processing facility recently opened in Grass Valley located in adjacent Sherman County. The processing facility currently employs nearly 60 people and is located in an elementary school building that had been closed. The wide range of uses associated with hemp could provide opportunities for hemp-related industries or businesses in Condon.

4.4.2 Value-added Waste Management

By far the leading industry in Gilliam County is waste management, which was responsible for 163 jobs and more than \$37.5 million in annual output in 2016. Value-added waste management in Gilliam County is primarily associated with the Columbia Ridge Landfill located south of the City of Arlington. The company that owns and operates the Columbia Ridge Landfill, Waste Management, serves residential, commercial, and industrial customers in cities throughout Oregon and Washington through landfill operations, curbside collection, dumpster, recycling, and other waste collection services.



Source: <http://wmnorthwest.com/landfill/columbiaridge.htm>

Waste Management cites the following information on its website for the Columbia Ridge Landfill:

- Year Opened: 1990
- Projected Life Remaining: 143 years
- Facility Acreage: 12,000 acres
- Permitted Footprint: 700 acres
- Remaining Permitted Capacity: 329 million tons
- Tons Processed Annually: 2.74 million in 2017
- Ownership: Waste Management Disposal Services of Oregon
- Permit Type and Permit Number: Oregon Department of Environmental Quality Solid Waste Permit No. 391
- Number of Employees: 111



Source: <http://wmnorthwest.com/landfill/columbiaridge.htm>

According to Waste Management's website, Columbia Ridge Landfill pays Gilliam County an annual host fee to support essential public sector services, capital improvements, and economic development, and that its host fee payments to Gilliam County in 2017 totaled \$3.8 million. In 1991, Gilliam County passed an ordinance directing how and where the money from host fees is distributed and updates the ordinance at least every five years.

Waste Management's information indicates that it donates to support youth and community vitality across Gilliam County, with contributions in 2017 totaling more than \$50,000 to support the chambers of commerce in Arlington and Condon, the Gilliam County Fair, and the Waste Management Community Partnership Scholarship Program (college scholarships for local students).

Construction and support services related to the following industries associated with value-added waste management and the Columbia Ridge Landfill could provide additional opportunities for expanding existing businesses or attracting new businesses to both Condon and Gilliam County.

4.4.2.1 Recycling

According to its website, Columbia Ridge Landfill does not accept certain types of waste, such as appliances, batteries, tires, discarded vehicles, and used oil. These kinds of

waste can be recycled, however. Recycling operations associated with these types of waste could provide additional opportunity for new businesses.⁸

4.4.2.2 Energy Production

The Columbia Ridge Landfill manages landfill gas to generate renewable energy, reduce emissions, and prevent odor. The system collects 5,400 cubic feet per minute of landfill gas through more than 84 wells. A portion of the gas is sent to an on-site energy plant, with the remaining gas managed by flares per federal requirements.

InEnTec is a waste treatment facility located near the Columbia Ridge Landfill that was constructed between 2010 and 2015. The InEnTec waste treatment facility was built and designed to use plasmas (generally hotter than 5,000 degrees Celsius) to treat waste without adverse effects on the environment while maximizing the potential for new energy through this type of recycling. However, according to the Sherman County Planning Director, the facility has not been in operation for at least the last four years.

4.4.2.3 Hazardous Waste Management

Chemical Waste Management of the Northwest, Inc., is located near the Columbia Ridge Landfill and offers a variety of hazardous waste management services including stabilization, microencapsulation, disposal, and transportation.

4.4.2.4 Composting

Composting could be a viable industrial opportunity associated with the Columbia Ridge Landfill. For example, Recology is a waste management company that uses composting as an added-value to its waste management operations to recover organic waste and turn it into compost soil, which it then sells to farmers, landscapers, and gardeners. Recology has locations in Oregon, Washington, and California.

4.4.3 Renewable Energy

Renewable energy is a recommended target industry for the City of Condon. Renewable energy comes in several forms including conventional hydroelectric power; biomass such as wood, waste, and alcohol fuels; geothermal; solar; and wind. Of these types of renewable energy, wind energy from vast wind farms extending throughout Gilliam County and energy generated from value-added waste management as discussed above represent the significant renewable energy industries in Gilliam County.

In adjacent Sherman County, Avangrid constructed a solar farm capable of producing 10 megawatts and is considering constructing another large solar farm on 3,000 to 5,000 acres elsewhere in the County. Considering Gilliam County's location, geography, and wide-open spaces are similar to those in Sherman County, it seems only a matter of time before energy

⁸ An interesting fact to note: recycling one aluminum can saves enough energy to run a television for two hours, a computer for three hours, or a 100-watt light bulb for 20 hours. Waste Management, <https://www.wm.com/recycling-services/home.jsp#recycle-bucket>

companies will be looking for sites in Gilliam County to construct additional wind and solar energy farms.

Although more research is needed, considering its versatility, hemp production could provide an opportunity to develop a facility for processing hemp into bio-fuel as a renewable energy.

Construction and support services related to the industries discussed above could provide opportunities for expanding existing businesses or attracting new businesses.

4.4.4 Specialty Trade Contractors

The North American Industry Classification System (NAICS) used by the U.S. Census Bureau provides a greater understanding of the types of contractors that fall within the specialty trade contractors industry. Specialty trade contractors can be found under NAICS code 238, which further separates specialty trade contractors into their more detailed types of construction activities.

According to the NAICS, the subsector of specialty trade contractors,

... comprises establishments whose primary activity is performing specific activities (e.g., pouring concrete, site preparation, plumbing, painting, and electrical work) involved in building construction or other activities that are similar for all types of construction, but that are not responsible for the entire project. The work performed may include new work, additions, alterations, maintenance, and repairs. The production work performed by establishments in the subsector is usually subcontracted from establishments of the general contractor type or operative builders, but especially in remodeling and repair construction, work also may be done directly for the owner of the property. Specialty trade contractors usually perform most of their work at the construction site, although they may have shops where they perform prefabrication and other work. Establishments primarily engaged in preparing sites for new construction are also included in this subsector.

Although the Condon Chamber of Commerce's website shows a list of 16 contractors that provide specialized construction in Condon and the surrounding area, the City has found there is actually a shortage of qualified contractors in Condon and Gilliam County.

The City, and other public and nonprofit agencies in the area helping to promote economic development, would like to see specialty trade contractors locate or expand in the planning area; however, the draw of large construction projects outside the planning area that attract these professionals appears to be a difficult obstacle to overcome at this time. One idea raised during the public meeting was to encourage development of a partnership program with the local high school to provide education and hands-on training in the construction trades as a way of increasing interest in students to pursue specialty trade contractor jobs and stay in the area after high school.

4.4.5 Tourism and Recreation

Condon has several assets and locational advantages that provide opportunities to attract new tourism and recreation-related businesses or to expand existing businesses. Assets include the City’s historic downtown and the nine-hole Condon Golf Course. Condon also serves as a gateway to Cottonwood Canyon State Park approximately 25 miles to the west via Highway 206 and the John Day Fossil Beds to the south from Highway 19. Cottonwood Canyon State Park is a new 8,000-acre state park along the John Day River that offers hiking, fishing, boating, picnicking, and camping. These recreational activities could provide opportunities for expanding existing businesses or creating new businesses or services to meet visitor needs.

4.5 Reconciliation of Land Demand and Supply and Factors Affecting Development

4.5.1 Reconciliation of Land Demand and Supply for Condon

4.5.1.1 Summary of Site Requirements

Table 4-1 summarizes the site requirement needs identified by FCS GROUP for projected industrial, commercial, and other employment land needs for the City of Condon for the 20-year planning period.

**TABLE 4-1
 SUMMARY OF CONDON’S SITE REQUIREMENTS**

Industrial Site Requirements	Commercial Site Requirements	Other
Three 2-acre sites and Two 4-acre sites	Flex buildings on 6 acres	Downtown Infill and Home-based Occupations

Source: FCS GROUP, 2019

Flex buildings are existing or new buildings that offer flexibility for businesses to economically reconfigure their interiors for space in ways that best suits their needs, whether that is for office space, retail use, production or distribution areas, showroom, studio, or any combination that meets their needs. Reconfiguration does not impact the structural integrity of a building. Flex buildings will vary in size and ability to meet certain needs and can be located in downtown areas or other parts of a community where space and off-street parking needs are greater.

4.5.1.2 Summary of Buildable Employment Lands Inventory

Table 4-2 summarizes the total vacant and redevelopable employment lands available to meet commercial and industrial site requirement needs for Condon for the 20-year planning period.

**TABLE 4-2
 SUMMARY OF CONDON'S BUILDABLE LANDS INVENTORY**

Zone	Total Developed and Vacant Acres	Vacant Acres Only	Vacant Constrained Acres	Redevelopable Acres	Net Buildable Acres
Airport Development	9.09	9.09	N/A	N/A	9.09
Commercial	64.98	12.08	4.35	2.88	10.61
Industrial	49.14	20.35	N/A	7.06	27.41
Public	Not determined	7.11	N/A	N/A	7.11

As shown on Table 4-2, Condon has 10.61 acres of commercially zoned vacant and redevelopable land and 27.41 acres of industrially zoned vacant and redevelopable land to meet its needs during the 20-year planning period. In addition, 9.09 acres in the Airport Development zone and 7.11 acres in the Public zone could potentially meet some of the City's industrial land needs.

The above summary on Table 4-2 is derived from the BLIs shown in Section 3 of this report.

4.5.1.3 Reconciliation

Table 4-3 below shows that Condon has a net surplus of 4.61 acres of commercially zoned land to meet its need for retail- and service-type uses.

The City's existing supply of Industrial zoned land exceeds projected land needs for industrial-type uses by 13.41 acres.

**TABLE 4-3
 SUMMARY OF CONDON'S EMPLOYMENT LAND NEEDS AND SUPPLY**

Zone	Projected Land Demand	Available Land Supply	Surplus (+)/ Deficiency (-)
Airport Development	Not Projected	9.09 acres	+ 9.09 acres
Commercial	6 acres	10.61 acres	+ 4.61 acres
Industrial	14 acres	27.41 acres	+13.41 acres
Public	Not Projected	7.11 acres	+ 7.11 acres

In addition to its Commercial and Industrial zoned land, Condon has 9.09 acres of vacant buildable land along the south side of the Condon State Airport zoned Airport Development that could meet some of the City's need for industrial development in addition to airport-related uses. Since a determination of need for Airport Development land could not be made at this time, there is no estimate as to whether the available supply of Airport Development land is sufficient to meet the City's need for airport-related uses. The City would like to see its future industrial land supply more concentrated in the vicinity of the airport.

City, county, federal, and state-owned property in Condon is zoned Public. These properties are developed with public employment-type uses such as City Hall, the County Courthouse, Oregon Department of Transportation highway maintenance shops, the City-owned golf course, and others. No determination of need for new or expansion of existing public uses was made as part of this report. As a result, there is no estimation of land need for public uses. The City did identify two vacant lots owned by the City totaling 7.11 acres in the northeast section of Condon zoned Public that could be re-zoned for other employment type uses, if needed. Considering the location of the property and surrounding uses, the most likely employment-type use suited for the property is industrial.

4.5.2 Factors Affecting Development of Employment Lands in Condon

A number of factors may constrain the ability or desirability of employment lands to meet land supply needs. Listed below are factors that individually, or in combination with each other, affect certain inventoried vacant and redevelopable employment lands within the City of Condon. The City Administrator for Condon, Kathryn Greiner, conducted a drive-by tour of the employment lands shown on the draft BLI map and provided valuable feedback in assessing each tax lot with these factors in mind.

4.5.2.1 Environment and Topography

Environmental and topographic factors that affect the development of employment lands include flood zones, wetlands, slope, depth to bedrock, and similar factors. The presence of one or more environmental or topographic factors may not necessarily preclude development since the application of special development standards may be an option to mitigate constraints. Compliance with special development standards does tend to significantly increase the costs of development, which may otherwise limit the feasibility of a number of economic development opportunities.

Within the city limits and UGB of the City of Condon, the only identifiable environmental constraints affecting inventoried employment lands were flood zone designations. Despite the large number of lots within Condon's Commercial zoned district, only four vacant lots (totaling 4.35 acres) appear to be within a flood zone according to Federal Emergency Management Agency flood map 4100720005B (September 24, 1984) for Condon. These four lots were not counted in the BLI for Condon due in part to other topographical considerations related to the flood zones.

4.5.2.2 Location and Lot Size

Location, lot size, and, to some extent, lot configuration can pose limitations on certain types of commercial or industrial development.

Lot sizes and lot configurations throughout Condon's Commercial zone are relatively small and uniform, approximately 0.25 acre in size or less. Vacant and/or redevelopable lots are dispersed throughout the commercially zoned areas, and there appears to be some opportunity for consolidation of vacant and redevelopable lots to accommodate larger commercial uses, if needed.

Several vacant and redevelopable lots in the Industrial zone are concentrated in the north-central and northeast portions of Condon a relatively short distance south of the airport, with sizes in the 4- to 5-acre range.

4.5.2.3 Access and Public Services

Access and public services, primarily water, wastewater, and electrical facilities, are critical factors that influence the ability, cost, and timing of economic development, as well as the amount of land needed to meet projected land needs.

A review of access from existing streets to inventoried vacant and redevelopable employment lands in Condon indicated that most, if not all, lots appear to have decent frontage along one or more city streets, suggesting that access should not constitute undue constraint to appropriate development.

Similarly, water, wastewater, and electrical services are assumed to be available, or could be made available from within existing street rights-of-way, to each of the inventoried lots. Although costs for extending public services are sometimes prohibitive in being able to develop a lot, such costs cannot be a factor as a matter of public policy for excluding a lot from the City's buildable employment lands inventory.

Considering the relatively small sizes of vacant and redevelopable lots, the existing street networks, and the assumed availability, or capability, of providing public services from within existing rights-of-way, no allowance was made in the inventory to deduct area for roads and utilities to serve any of the vacant or redevelopable commercially zoned lots.

Although land needs tend to vary greatly for different types of industrial uses, for much the same reasons as lands in the Commercial zone, no allowance was made to deduct area for roads and utilities to serve potential uses in the Industrial zone.

4.5.2.4 Public Water, Wastewater, and Storm Drainage System Capacities

The ability for a city to accommodate economic development is contingent upon whether the city's water and wastewater systems have the capacities to supply and treat the demands of projected development during the 20-year planning period.

The City indicated that its water and wastewater systems have capacity to accommodate the projected commercial and industrial land development for the 20-year planning period, from 2019 to 2039.

4.5.2.5 Ownership

Ownership is a less obvious factor that can affect the availability of land for development. For example, a significant number of vacant or redevelopable lots in the same ownership may indicate speculative private investment with unrealistic return

expectations. Conversely, vacant land owned by a city may present unique opportunities using a public/private partnership approach.

During development of the buildable employment lands inventory for Condon, Anderson Perry & Associates, Inc., made a cursory review of the ownership of vacant and redevelopable lots to determine if there appeared to be any obvious patterns that could hinder – or help – development. Ownership of vacant and redevelopable lots within both the Commercial and Industrial zones appears to be relatively diverse, suggesting that speculation or, conversely, lack of interest in developing or redeveloping these properties is unlikely to be a constraint factor.

The City of Condon owns 7.11 acres in the Public zone at the southeast corner of Cottonwood Lane and N. Main Street that could be rezoned and made available for industrial development. Land-banking could be an objective for Condon to acquire vacant and/or redevelopable lots to make them more readily available for commercial or industrial development, for example, through the use of public incentives or in accordance with other City planning efforts.

4.5.2.6 Lack of Affordable Workforce Housing

Local advisory committee members emphasized the lack of available and affordable workforce housing in Condon (and Gilliam County) as a major impediment to new businesses or expansion of existing businesses that require employees to live near where they work, including home-based professionals and telecommuters.

The lack of affordable workforce housing is a problem expressed by many communities in eastern Oregon. For example, in Grass Valley, one new major employer has underwritten several small mobile-unit homes placed in the Grass Valley RV Park to provide housing for some of its employees to address this issue. This case demonstrates how real the housing problem is, but the effort by this employer is not likely to be repeated by other employers.

Although the issue of affordable housing is beyond the scope of this report, the issue is noted here to underscore the importance of housing to economic development.

4.5.2.7 Fiber Optic Broadband Service Capability

Condon, working with Gilliam County, the Port of Arlington, and the City of Arlington, recently installed fiber optic cable to allow residents and businesses in the community the ability to obtain high-speed broadband and Internet service. The new fiber optic cable will provide the City of Condon with the same broadband and Internet capabilities that exists in larger cities in the region, including The Dalles and Hermiston. Fiber optic cable availability provides critical infrastructure and data access needed to attract new businesses to the community and allow existing businesses greater opportunity to expand.

4.5.2.8 Climate Change

In August 2018, the Oregon Climate Change Research Institute prepared a report entitled *Climate Change Influence on Natural Hazards in Eight Oregon Counties*. The report identified 11 types of natural hazards and projected the risks that the Earth's warming climate may have on each type of natural hazard by the 2050s as compared to the baseline study period from 1971 to 2000. Gilliam County is one of the eight counties included in the report.

The natural hazards discussed include heat waves, cold waves, heavy rains, river flooding, drought, wildfire, poor air quality, windstorms, dust storms, increased invasive species, and loss of wetland ecosystems. For Gilliam County, the risk of climate warming on drought and windstorms by the 2050s is expected to stay about the same. Cold waves and dust storms are projected to decrease. For the seven other types of natural hazards, the risks are anticipated to increase in the number of occurrences and severity.

The increased risk of climate warming on natural hazards may, in turn, have adverse impacts on existing industries and businesses, and livability in general. Similarly, new economic development opportunities may arise. The wind energy industry, processes associated with waste management, and recycling are examples of opportunities to reduce climate warming while meeting energy needs and creating jobs.

Section 5.0 Draft Economic Policy Recommendations

5.1 Introduction

This section includes Condon's current economic development goal and polices with draft amendments and new recommended draft community economic development policies and objectives consistent with Oregon Administrative Rules 660-009-0020. A list of recommended next steps is provided following the updated draft economic development comprehensive plan policies for Goal 9. The draft policies and objectives listed below are intended to guide positive economic development within the urban growth boundary.

Condon's existing stated economic goal and policies are shown in Section 5.2. Recommended amendments and new policies, objectives, and strategies are shown in **bold**. Existing language recommended to be deleted is shown with a strikethrough line, like ~~this~~.

5.2 Recommended Amendments to Current Economic Development Policies; Recommended New Policies; Objectives and Strategies

Goal 9: Economics

To strengthen, diversify and maintain the economy of Condon and the state with a particular focus on existing important local sectors including, but not limited to, value-added agriculture, value-added waste management, renewable energy, construction, recreation and government. ~~To provide adequate opportunities throughout the state for a variety of economic activities vital to the health, welfare, and prosperity of Oregon cities.~~

Policies

1. The City of Condon shall strive to provide adequate plans for economic activities that contribute to the well-being of the City.

Objective 1.1: Consider strategies to make Condon a destination for tourism as well as year-round residents and potential employers.

Strategies:

- **Develop a community vision that reflects community values and can serve as a basis for a five-year economic development strategy.**
- **Encourage unique opportunities to attract visitors to experience Condon's scenic and historic qualities consistent with the community's vision.**
- **Focus on quality of life draws such as theater, bowling alley, breweries, etc.**
- **Continue coordinating with Sherman, Wheeler, and Grant Counties on a John Day River Territory tourism marketing strategy.**

Objective 1.2: Support Oregon Aviation Department, Gilliam County, and Port of Arlington efforts that result in an updated Condon State Airport Master Plan and associated infrastructure improvements.

Objective 1.3: Develop a capital improvement program for public infrastructure needed to support and encourage development of vacant and redevelopable commercial and industrial sites identified in the buildable employment lands inventory.

Objective 1.4: Consider developing an industrial park on land currently owned by the City of Condon zoned Public to provide space to encourage business startups.

2. Recognizing the City's finite commercial area, the City shall strive to maintain the viability of the downtown commercial core area.

Objective 2.1: Support full utilization of buildable vacant lands within the City's downtown commercial core for multiple types of businesses.

Objective 2.2: Develop a downtown improvement plan that builds on the work currently contained in Condon's Comprehensive Land Use Plan. The Community Assessment Report for Condon, Oregon, conducted by the Oregon Economic and Community Development Department's Main Street Program in March 2009, contains information in this regard.

3. The City shall strive to provide an adequate amount of **employment** (commercial and industrial) land for future needs.

Objective 3.1: Maintain 20-year buildable land inventory of vacant Commercial and Industrial zoned sites proportionally to meet business expansion requirements for target industries that are identified in this Economic Opportunities Analysis (Section 3), as current sites develop.

Objective 3.2: Work with Gilliam County, the Port of Arlington, and Business Oregon to attract traded sector businesses on airport and industrial land that offer living wages (includes average wage rates higher than the statewide average median wage for all private business establishments).

Objective 3.3: Support full utilization of buildable vacant lands within the City for multiple types of businesses, including commercial and industrial.

Strategies:

- Provide public services that can be extended to employment lands.
- Develop a tracking system for the development of employment lands.
- Promote commercial and industrial lands for sale or for lease on Business Oregon's www.oregonprospector.com.

4. The City shall continue to support home-based occupations and provide for a streamlined review and approval process for them.

Objective 4.1: Monitor home-based business occupations.

Strategies:

- **Upon City Council request, conduct annual survey of local businesses to determine local business expansion needs.**

5. The City shall strive to provide a streamlined approach to all development review.

6. **Become a Visible Economic Development partner in Gilliam County.**

Objective 6.1: Support City, Port, County, regional, state, and federal projects and initiatives that may positively impact or influence business development in Condon.

Strategies:

- **Promote update of the Condon State Airport Master Plan by the Oregon Aviation Department.**

Objective 6.2: Seek and foster working relationships with the Greater Eastern Oregon Economic Development District and Mid-Columbia Economic Development District that encourage cooperation to leverage assistance and funding options for economic planning and economic development projects.

Objective 6.3: Establish working relationships with Gilliam County and the Port of Arlington to routinely obtain guidance and assistance with opportunities in the target industries.

Objective 6.4: Encourage and partner to develop educational and training programs within the construction trades to promote and retain a larger, more diversified pool of construction contractors within the local area.

5.3 Draft Recommended Next Steps

1. **Develop a community vision and economic development strategy through a community process to help guide appropriate economic opportunities and development, and identify partner roles and responsibilities.**
2. **Continue to address workforce housing needs and opportunities through Goal 10 Housing, Department of Land Conservation and Development, and Oregon Housing and Community Services.**
3. **Update the City's capital improvement program for public infrastructure to support and encourage needed employment and housing development.**

APPENDICES

Appendices Table of Contents

Appendix A Cities of Gilliam County EOA Market Opportunities Analysis and Employment Lands Needs,
Prepared by FCS GROUP

Appendix B Interviews with City Officials for Lonerock and Arlington to Gauge Level of Satisfaction with
Existing Employment Land Supplies

APPENDIX A
Cities of Gilliam County EOA Market
Opportunities Analysis and Employment
Lands Needs, Prepared by FCS GROUP

Cities of Gilliam County

EOA Market
Opportunities
Analysis and
Employment Land
Needs

FCS GROUP

Appendix A

TABLE OF CONTENTS

Table of Contents	i
Section I. Summary	1
I.A. Market Region	1
I.B. Population Trends	1
I.C. Socio-Economic Characteristics	1
I.D. Employment Land Needs	4
II. Market Analysis	5
Market Region	5
Population Trends	5
Socio-Economic Characteristics	6
Racial and Ethnic Composition	8
Labor Force	9
Potential Target Industry Sectors	13
III. City Profiles & Site Requirements	17
Employment Land Needs	17

Section I. SUMMARY

This section includes an analysis of economic trends and local competitive advantages according to prepared employment growth forecasts in accordance with OAR 660-009-0015(1-4). The analysis considers regional economic development objectives to inform the growth forecast.

I.A. MARKET REGION

FCS GROUP conducted an economic overview of Gilliam County in context with a large market region and the state of Oregon. Gilliam County is part of the Greater Eastern Oregon Economic Development Corporation region, which consists of most of eastern and southeastern Oregon. However, for analysis purposes of this study, the defined Primary Market Area (PMA) consists of Gilliam, Hood River, Sherman and Wasco Counties in Oregon as well as Klickitat and Skamania Counties in Washington (Exhibit 2). These counties were selected because they share a common labor shed along with access to Interstate 84, the Columbia River as well as Union Pacific and Burlington Northern Santa Fe (BNSF) rail lines (**Appendix A, Market Region**).

I.B. POPULATION TRENDS

In 2017 the PMA had a total population of 84,840. While the population of other counties in the region have increased, Gilliam County population has held fairly constant at around 1,900 residents. Forecasts from Portland State University's (PSU) Population Research Center (PRC) project positive growth for Gilliam County and the region over the next 25 years (**Appendix A, Population Trends**).

I.C. SOCIO-ECONOMIC CHARACTERISTICS

Income

As with most rural counties, Gilliam County income levels have been well below the state average, but median family income levels appear to be rising. According to U.S. Census estimates, Gilliam County median family income was \$55,625 in 2017 up 0.7% from \$52,885 in 2012 (**Appendix A, Socio-Economic Trends**).

Education

Gilliam County's economic opportunities are further defined by the educational attainment of its labor force. Most of Gilliam County's residents aged 25 and older have obtained a high school diploma or equivalent. However, Gilliam County residents were surpassed by the region and state average with regard to the share with college degrees.

Recent analysis of job vacancies indicates that there are many unfilled job opportunities in Gilliam County, particularly in agriculture and construction, which may indicate a tight labor market and possibly the need for additional local workforce (Oregon Employment Department 2017).

Unemployment

Since 2000, Gilliam County's unemployment rates have been slightly below the PMA region but above the statewide average. However by the end of 2018, Gilliam County caught up with the state average with unemployment rates as follows: Oregon at 4.1%, the PMA at 5.7% and Gilliam at 4.1%.

Labor Force

Labor force includes residents aged 16 years and older that are working or actively looking for work. The labor force of the PMA region was 45,345 in 2017.

Employment

Within the PMA region, most businesses are concentrated within cities along the Columbia River.

According to IMPLAN statistics, in 2016 Gilliam County comprised 3% of the region's total employment. The county is particularly strong within the services sector, which makes up nearly half of its employment. As a share of the PMA, the county's share of industrial employment has ranged from 3% to 4% of the over the past decade.

The leading employment sectors in Gilliam County are depicted in **Exhibit 1**. The top-10 sectors in the county make up 30% of the county's output and 30% of its total employment. The top three sectors include: waste management, government and agriculture (grain farming). By far the leading sector in Gilliam County is waste management, which was responsible for 163 jobs and over \$37.5 million in annual output in 2016.

Exhibit 1: Top-Ten Sectors in Gilliam County

Sorted by Top 10 Sectors	Employment	Output
Waste management and remediation services	163	\$37,510,117
Local govt, non-education	128	\$7,418,082
Grain farming	114	\$15,097,464
Beef cattle ranching and farming	87	\$5,435,499
Local govt, education	53	\$2,886,735
Warehousing and storage	49	\$5,014,889
Wholesale trade	48	\$7,692,873
Professional, scientific, and technical services	42	\$1,206,566
Management of companies and enterprises	26	\$4,645,005
Support activities for agriculture	24	\$1,392,655
Subtotal	734	\$88,299,884
Other	1,720	\$210,044,436
Total	2,453	\$298,344,320

Source: IMPLAN model for Gilliam County, 2016.

Agriculture

Trends observed in the U.S. Census of Agriculture show a slight increase in total number of farms and a negligible loss of farmland between 2007 and 2012 (**Exhibit 17**). Despite this small reduction in farmland, the aggregate value of agriculture products sold from Gilliam County increased nearly 20% during the same time period.

Potential Target Industry Sectors

The Location Quotient analysis for Gilliam County identifies several potential target business clusters, including:

- Value-added Waste Management (largest cluster which includes various solid waste streams)
- Utilities (significant cluster with high LQ could include additional establishments to support renewable energy)
- Wholesale Trade (cluster with high LQ and 11% annual job growth forecast)
- General manufacturing and vehicle/truck maintenance
- Miscellaneous services (emerging LQ cluster expected to support businesses along the Columbia River Gorge freight corridor).

Based on these findings, cities in Gilliam County are best situated to leverage their unique position in the PMA by investing in sectors that have an established presence in the county. Recommended target industries, such as waste management have a very strong presence in the county and hold potential to further economic opportunity with value added services.

Businesses that benefit from interaction across multiple sectors will present significant economic opportunities for cities in Gilliam County. Gilliam County’s agriculture industry makes up a large part of its industrial sector. As these industries thrive, opportunities exist to benefit from other sectors, such as services related to the support and maintenance of agriculture production facilities, value-added waste management facilities and related supply chains. Looking forward, cities in Gilliam County could seek to accommodate some or all of the target clusters listed in **Exhibit 20**.

I.D. EMPLOYMENT LAND NEEDS

The analysis of employment land needs takes into account the projected level of job growth within the PMA region, and the potential for Gilliam County cities to attract a proportionate share of business activity. The overall findings portend continued positive growth for the region in all major job sectors, with the possible exception of government jobs which tend to be largely driven by federal and state spending patterns as well as local population growth.

Based on historic trends and related economic forecasts discussed previously, FCS GROUP expects overall private job growth within the PMA to approach 9,000 jobs over the next 20 years (high growth scenario).

In accordance with the projections for Gilliam County, the city of Condon should plan to accommodate up to 20 buildable acres for employment over the next 20 years. The recommended mix of land supply should include up to 14 acres for industrial development and up to 6 acres for commercial development as shown below in on Exhibit 20 of Appendix B.

Projected 20-Year Employment Site Requirements: High Growth Scenario			
	Industrial Site Requirements	Commercial Site Requirements	Other
Condon	Three 2-acre sites & two 4-acre sites	Flex building(s) on 6 acres	Downtown infill and home-based occupations

Source: derived from prior tables.

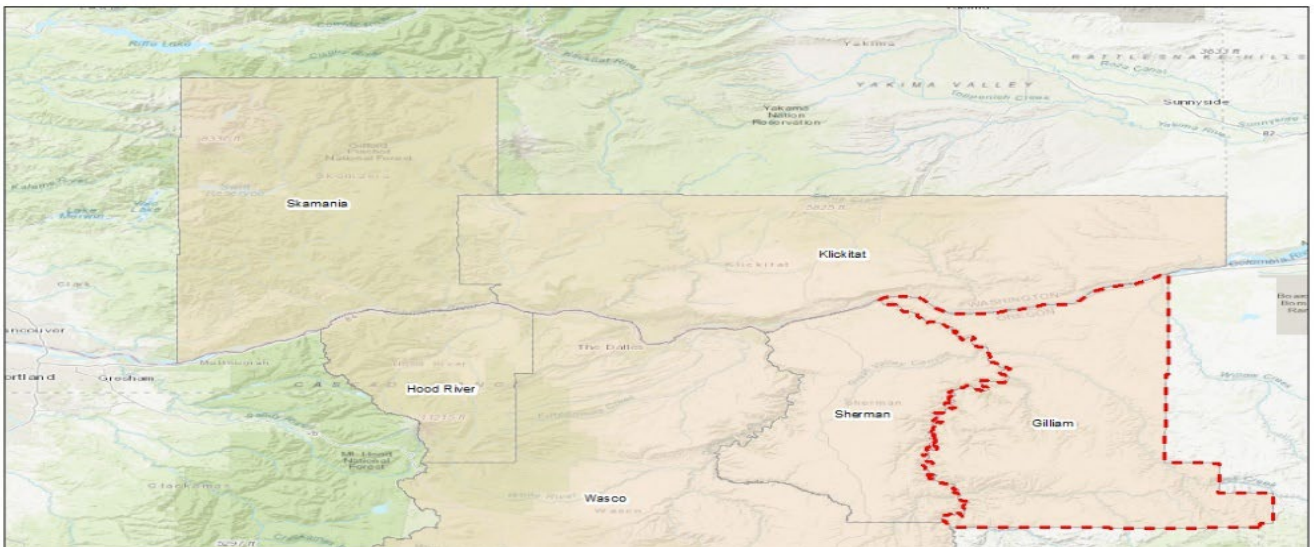
II. MARKET ANALYSIS

This section includes an analysis of economic trends and local competitive advantages according to prepared employment growth forecasts in accordance with OAR 660-009-0015(1-4). The analysis considers regional economic development objectives to inform the growth forecast.

MARKET REGION

FCS GROUP conducted an economic overview of Gilliam County in context with a large market region and the state of Oregon. Gilliam County is part of the Greater Eastern Oregon Economic Development Corporation region, which consists of most of eastern and southeastern Oregon. However, for analysis purposes of this study, the defined Primary Market Area (PMA) consists of Gilliam, Hood River, Sherman and Wasco Counties in Oregon as well as Klickitat and Skamania Counties in Washington (**Exhibit 2**). These counties were selected because they share a common labor shed along with access to Interstate 84, the Columbia River as well as Union Pacific and Burlington Northern Santa Fe (BNSF) rail lines.

Exhibit 2: Gilliam County and the Primary Market Region



POPULATION TRENDS

In 2017 the PMA had a total population of 84,840. Over the last two decades the PMA has experienced significant population growth with variability among the counties of the region. While

the population of other counties in the region have increased, Gilliam County population has held fairly constant at around 1,900 residents (**Exhibit 3**).

Exhibit 3: Population Trends (2000-2017)

	2000	2010	2017	Change (2000 to 2017)	AGR %
Gilliam	1,915	1,871	1,910	-5	0.0%
Condon	759	601	595	-164	-1.4%
Hood River	20,411	22,346	22,938	2,527	0.7%
Klickitat	19,161	20,318	21,172	2,011	0.6%
Sherman	1,934	1,765	1,635	-299	-1.0%
Skamania	9,872	11,066	11,498	1,626	0.9%
Wasco	23,791	25,213	25,687	1,896	0.5%
Primary Market Area	77,084	82,579	84,840	7,756	0.6%
Oregon	3,421,389	3,831,074	3,982,267	560,878	0.9%

Source: US Census Bureau, Decennial Census 2000, 2010 (Table DP-1) and ACS 2017 (Table DP05).
AGR = Annual Growth Rate.

Forecasts from Portland State University’s (PSU) Population Research Center (PRC) project positive growth for Gilliam County and the region over the next 25 years (**Exhibit 4**).

Exhibit 4: Population Forecasts (2016-2040)

	2016	2020	2025	2030	2035	2040
Gilliam County	2,010	2,046	2,089	2,129	2,167	2,206
Region (GEODC)	142,977	146,322	150,339	154,256	158,052	161,827
Oregon	3,982,267	4,252,100	4,516,200	4,768,000	4,995,200	5,203,000

Source: Portland State University Population Forecasts and Washington State Government Office of Financial Management.

SOCIO-ECONOMIC CHARACTERISTICS

Income

As with most rural counties, Gilliam County income levels have been well below the state average, but median family income levels appear to be rising. According to U.S. Census estimates, Gilliam County median family income was \$55,625 in 2017 up 0.7% from \$52,885 in 2012 (**Exhibit 5**).

Exhibit 5: Income Trends (2010-2017)

	2010	2017	AGR
Median Household Income			
Gilliam County	\$42,148	\$39,831	-0.8%
Oregon	\$49,260	\$56,119	1.9%
Median Family Income			
Gilliam County	\$52,885	\$55,625	0.7%
Oregon	\$60,402	\$69,031	1.9%
Per Capita Income			
Gilliam County	\$25,559	\$24,178	-0.8%
Oregon	\$26,171	\$30,410	2.2%

Source: 2000 Census (in 1999 dollars) and 2017 ACS 5-year Estimates (in 2017 inflation-adjusted dollars).

AGR = Annual Growth Rate.

Education

Gilliam County’s economic opportunities are further defined by the educational attainment of its labor force. The majority of Gilliam County’s residents aged 25 and older have obtained a high school diploma or equivalent. However, Gilliam County residents were surpassed by the region and state average with regard to the share with college degrees (**Exhibit 6**).

Exhibit 6: Educational Attainment of Population 25 years and over

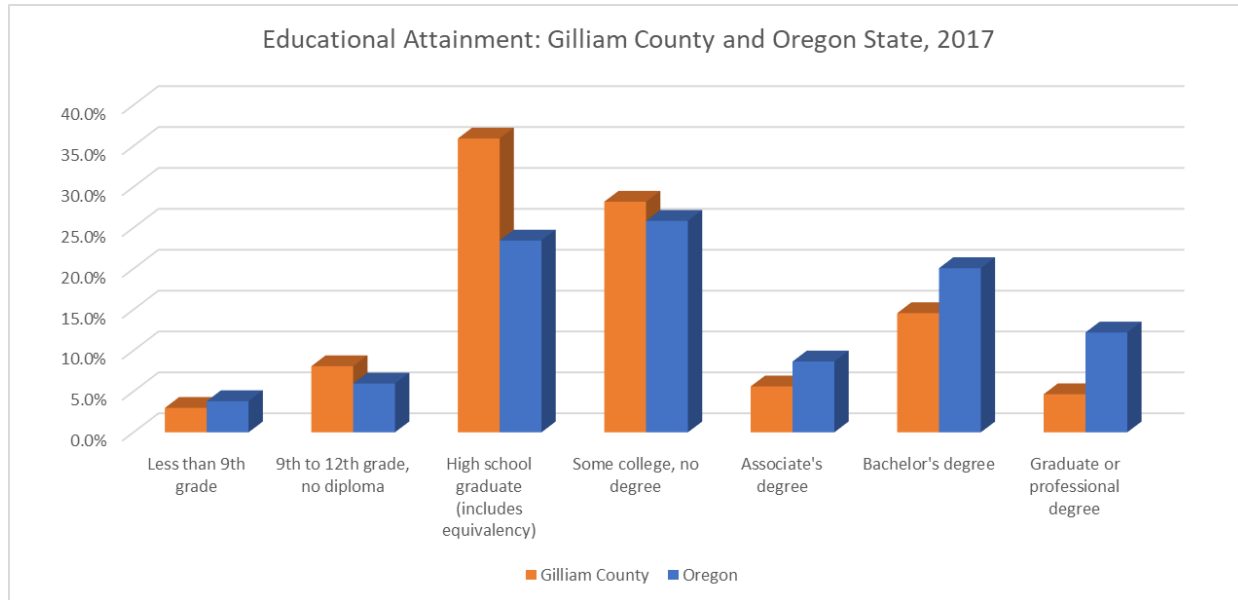
Gilliam County and the State of Oregon, 2017

	Gilliam County	% Dist.	Oregon	% Dist.
Less than 9th grade	41	3.0%	106,711	3.8%
9th to 12th grade, no diploma	111	8.1%	166,982	6.0%
High school graduate (includes equivalency)	493	35.9%	655,921	23.4%
Some college, no degree	387	28.2%	723,165	25.8%
Associate's degree	77	5.6%	242,247	8.7%
Bachelor's degree	200	14.6%	561,492	20.1%
Graduate or professional degree	64	4.7%	341,435	12.2%
Total	1,373	100%	2,797,953	100%

Source: 2017 ACS 5-year Estimates.

Recent analysis of job vacancies indicates that there are many unfilled job opportunities in Gilliam County, particularly in agriculture and construction, which may indicate a tight labor market and possibly the need for additional local workforce (Oregon Employment Department 2017).

Exhibit 7: Educational Attainment (source: American Community Survey)



Racial and Ethnic Composition

Gilliam County’s racial and ethnic characteristics also highlights the changing nature of the workforce in the county as well as business needs. Gilliam County’s population has decreased overall between 2000 and 2017, however, has experienced growth among its American Indian and Alaska Native population as well as the population of Hispanic or Latino residents (**Exhibit 8**).

Exhibit 8: Racial and Ethnic Composition of Gilliam County and Oregon (2000-2017)

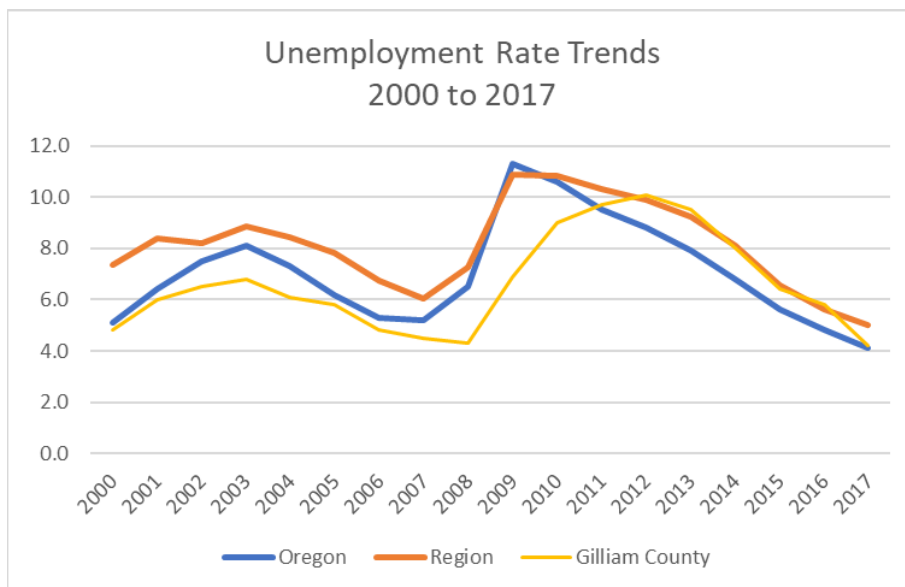
	Gilliam County			Oregon		
	2000	2017	Change	2000	2017	Change
Total:	1,915	1,910	-0.3%	3,421,399	4,025,127	17.6%
White alone	1,853	1,783	-3.8%	2,961,623	3,416,776	15.4%
Black or African American alone	3	-	-100.0%	55,662	76,347	37.2%
American Indian and Alaska Native alone	16	99	518.8%	45,211	45,332	0.3%
Asian alone	3	-	-100.0%	101,350	166,351	64.1%
Native Hawaiian and Other Pacific Islander alone	-	14	N/A	7,976	15,157	90.0%
Some other race alone	22	14	-36.4%	144,832	121,000	-16.5%
Two or more races:	18	-	-100.0%	104,745	184,164	75.8%
Two races including Some other race	1	-	-100.0%	29,929	17,499	-41.5%
Two races excluding Some other race, and three or more r	17	-	-100.0%	74,816	166,665	122.8%
Hispanic or Latino	35	154	340.0%	275,314	509,507	85.1%

Source: 2000 Census (SF1, T able QT-P3) and 2017 ACS 5-year Estimates (Tables B02001 & B03002).

Unemployment

Since 2000, Gilliam County's unemployment rates have been slightly below the PMA region but above the statewide average. However by the end of 2018, Gilliam County caught up with the state average with unemployment rates as follows: Oregon at 4.1%, the PMA at 5.7% and Gilliam at 4.1% (**Exhibit 9**).

Exhibit 9: Oregon, PMA, Gilliam County Unemployment (2000-2017)



Labor Force

Labor force includes residents aged 16 years and older that are working or actively looking for work. The labor force of the PMA region was 45,345 in 2017. The average commute time for workers living in the PMA was 20.6 minutes which compares favorably to most urban areas (**Exhibit 10**).

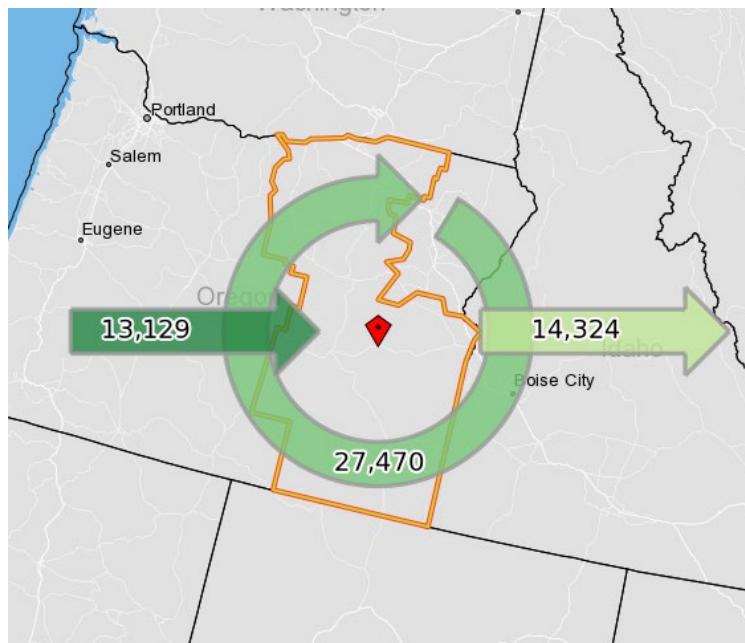
Exhibit 10: PMA Labor Force and Commute Patterns

	Labor Force	Commute Time (in min)	Car or Carpool	Works at Home	Other
Gilliam	865	17.5	82.8%	7.4%	9.8%
Hood River	14,359	17.4	79.5%	11.2%	9.3%
Klickitat	10,051	24.1	82%	12%	6.0%
Skamania	5,218	30.5	84.1%	9.9%	6.0%
Sherman	897	22.3	80.3%	10.8%	8.9%
Wasco	13,955	17.6	85.8%	7.9%	6.3%
Total	45,345	20.6	82.6%	10.1%	7.3%

Source: Bureau of Labor Statistics, 2017 Unemployment Data and US Census Bureau ACS 2017, Table S0801.

In 2015 there were 40,552 workers employed at businesses within the PMA region. About half of these workers lived and worked inside of the PMA region. About one in four workers commuted outside of the PMA to jobs elsewhere. In addition, the PMA region had 8,317 workers commuting in from outside of the area (see **Exhibit 11**).

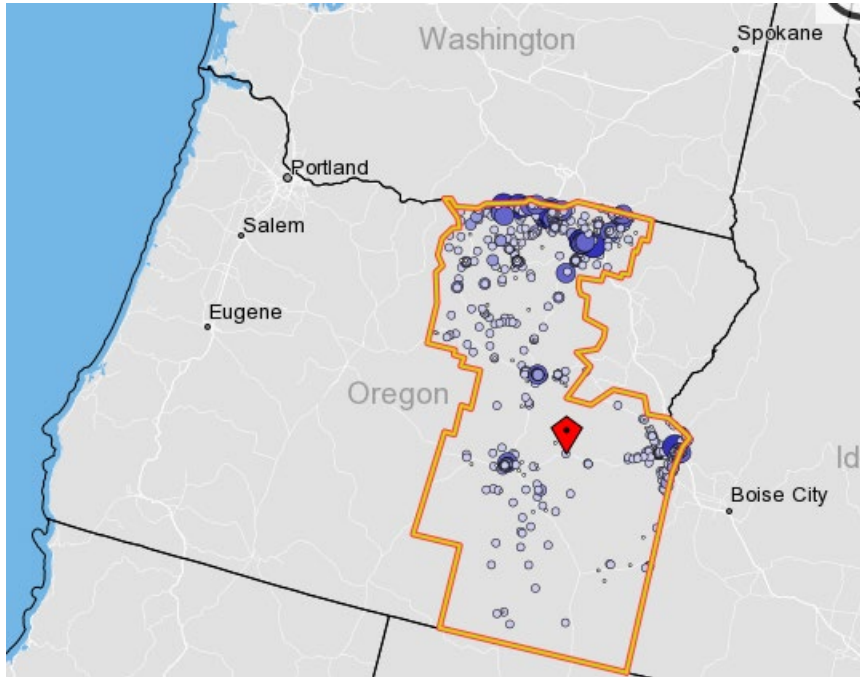
Exhibit 11: Commuter Inflow & Outflow, PMA Region



Employment

Within the PMA region, many businesses are concentrated within cities along the Columbia River (**Exhibit 12**).

Exhibit 12: Job Concentration



According to IMPLAN statistics, in 2016 Gilliam County comprised 3% of the region’s total employment. The county is particularly strong within the services sector, which makes up nearly half of its employment. As a share of the PMA, the county’s share of industrial employment has ranged from 3% to 4% of the over the past decade.

Exhibit 13: Total Employment, 2016

	PMA Employment	Gilliam County Employment	Gilliam County Share
Industrial (incl. Ag)	10,677	472	4%
Retail	3,793	81	2%
Services	18,117	451	2%
Government	3,925	222	6%
Total	36,512	1,227	3%

Source: IMPLAN model, 2016; includes full-time and part-time jobs.

The leading employment sectors in Gilliam County are depicted in **Exhibit 14**. The top-10 sectors in the county make up 30% of the county’s output and 30% of its total employment. The top three sectors include: waste management, government and agriculture (grain farming). By far the leading sector in Gilliam County is waste management, which was responsible for 163 jobs and over \$37.5 million in annual output in 2016.

Exhibit 14: Top-Ten Sectors in Gilliam County

Sorted by Top 10 Sectors	Employment	Output
Waste management and remediation services	163	\$37,510,117
Local govt, non-education	128	\$7,418,082
Grain farming	114	\$15,097,464
Beef cattle ranching and farming	87	\$5,435,499
Local govt, education	53	\$2,886,735
Warehousing and storage	49	\$5,014,889
Wholesale trade	48	\$7,692,873
Professional, scientific, and technical services	42	\$1,206,566
Management of companies and enterprises	26	\$4,645,005
Support activities for agriculture	24	\$1,392,655
Subtotal	734	\$88,299,884
Other	1,720	\$210,044,436
Total	2,453	\$298,344,320

Source: IMPLAN model for Gilliam County, 2016.

Within the PMA region, large employment gains have been made in both industrial and services clusters between 2005 and 2015 (**Exhibit 15**).

Exhibit 15: Job Trends by Industry Sector – PMA Region

Region Jobs by NAICS Industry Sector	2005 - 2015 Job Growth	2005	2015	Change
Industrial		5,575	7,388	1,813
Retail Trade		2,769	2,834	65
Services		10,905	13,483	2,578
Government		1,513	1,422	(91)
Total		20,762	25,127	4,365

Source: US Census Bureau, 2000 to 2015, provided by OnTheMap.com

An analysis of Gilliam County highlights the change in jobs from 2005 to 2015 (**Exhibit 16**).

Exhibit 16: Job Trends by Industry Sector – Gilliam County

Gilliam Jobs by NAICS Industry Sector	2005 - 2015 Job Growth	2005	2015	Change
Industrial		285	237	-48
Retail Trade		42	43	1
Services		226	217	-9
Government		95	96	1
Total		648	593	-55

Source: US Census Bureau, 2000 to 2015, provided by OnTheMap.com

Agriculture

Trends observed in the U.S. Census of Agriculture show a slight increase in total number of farms and a negligible loss of farmland between 2007 and 2012 (**Exhibit 17**). Despite this small reduction in farmland, the aggregate value of agriculture products sold from Gilliam County increased nearly 20% during the same time period.

Exhibit 17: Gilliam County Agricultural Statistics (2007-2012)

	2007	2012	Change
# of Farms	164	170	4%
Land in Farms (acres)	733,387	723,405	-1%
Average Size of Farm (Acres)	4,742	4,255	-5%
Market Value of Products Sold	\$37,048,000	\$44,054,000	19%
Average Per Farm	\$225,902	\$259,141	15%
Government Payments	\$5,327,000	\$7,931,000	49%
Average per farm receiving payments	\$42,616	\$51,836	22%

Source: US Census of Agriculture.

The most recent employment forecast conducted by the Oregon Employment Department (OED) projects robust job growth in the East Cascades Sub-region, which consists of Gilliam, Hood River, Sherman, Wasco and Wheeler counties (**Exhibit 18**).

Exhibit 18: Employment Forecasts for the East Cascades Region (2017-2027)

Sector	2017	2027	Change	Projected Growth
Industrial	9,110	9,980	870	10%
Retail	3,340	3,590	250	7%
Services	18,380	21,060	2,680	15%
Government	4,120	4,300	180	4%
Total	34,950	38,930	3,980	11%

Source: State of Oregon Employment Department, 2018; includes Gilliam, Hood River, Sherman, Wasco and Wheeler counties; FCS GROUP.

Potential Target Industry Sectors

An analysis of location quotients (LQs) was performed to ascertain the relative attractiveness of Gilliam County to certain industries. LQ analysis is a method of determining which business sectors are clustered in Gilliam County in comparison to the PMA region. LQ analysis reveals what makes the local economy “unique” in comparison to a broader geography. The LQ analysis in this study indicates existing and emerging business clusters present in Gilliam County based on their size (as

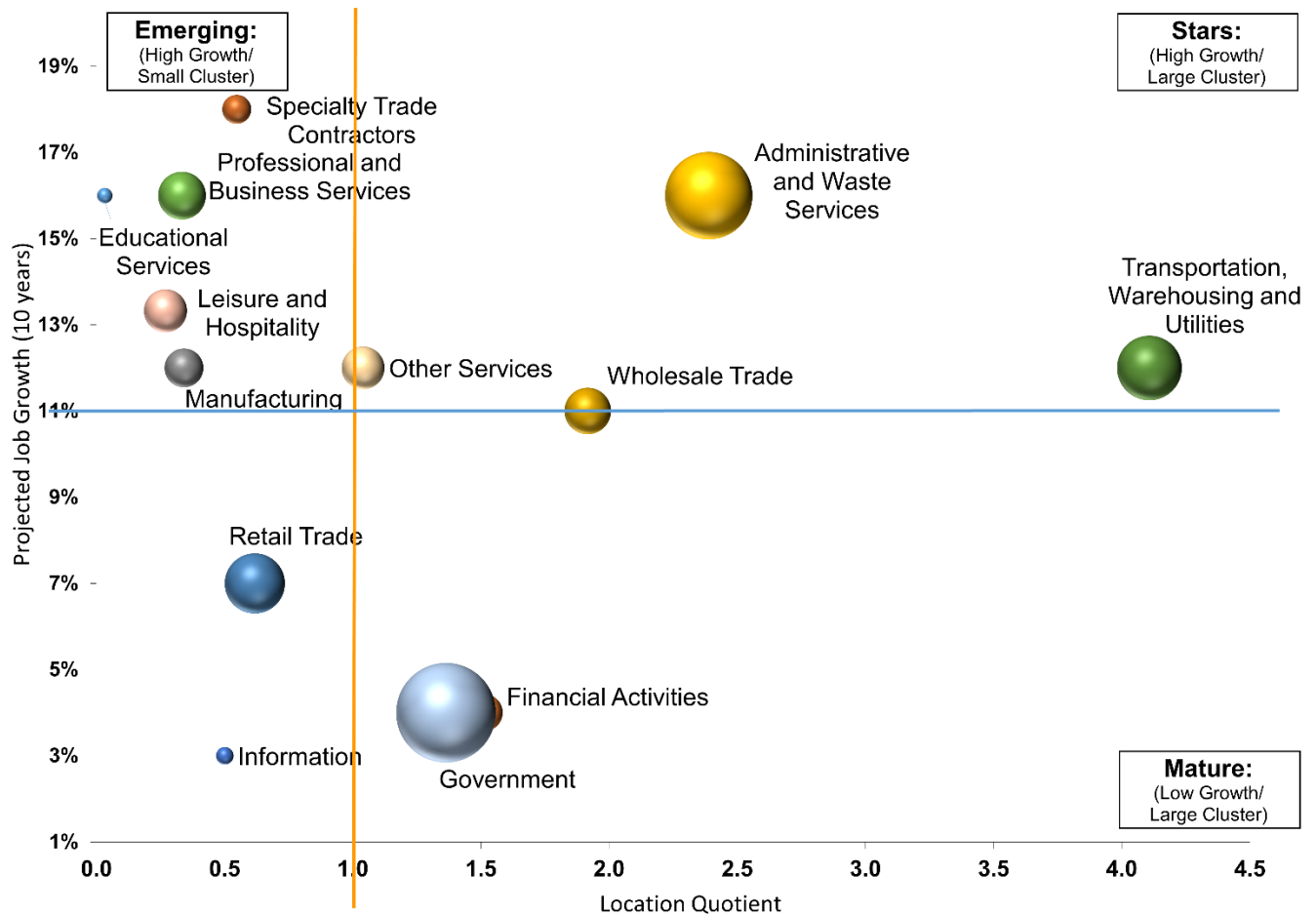
measured by employment) and projected growth potential. The data used for the cluster analyses were derived from the Oregon Employment Department 2017 wage and salary employment statistics and ten-year job growth forecasts (**Exhibit 19**).

Business clusters in Gilliam County with high LQs include transportation, warehousing and utilities, as well as wholesale trade and construction. The utilities sector, which includes Gilliam County's sizable wind farms, has an LQ of 6 (six times more concentrated than the regional average).

The LQ analysis for Gilliam County identifies several potential target business clusters, including:

- Value-added Waste Management (largest cluster which includes various solid waste streams)
- Utilities (significant cluster with high LQ could include additional establishments to support renewable energy)
- Wholesale Trade (cluster with high LQ and 11% annual job growth forecast)
- Miscellaneous services (emerging LQ cluster expected to support businesses along the Columbia River Gorge freight corridor).
- Specialty Trade Contractors (potential emerging cluster in Gilliam County which also claims the highest projected annual job increases)

Exhibit 19: Location Quotient Analysis – Gilliam County



Based on these findings, cities in Gilliam County are best situated to leverage their unique position in the PMA by investing in sectors that have an established presence in the county. Recommended target industries, such as agriculture and waste management have a very strong presence in the county and hold potential to further economic opportunity with value added services. Of the industries discussed throughout this analysis those highlighted in **Exhibit 20** represent excellent opportunities for growth for the cities of Gilliam County.

As mentioned earlier, businesses that benefit from interaction across multiple sectors will present significant economic opportunities for cities in Gilliam County. Gilliam County’s agriculture industry makes up a large part of its industrial sector. As these industries thrive, opportunities exist to benefit from other sectors, such as services related to the support and maintenance of agriculture production facilities, value-added waste management facilities and related supply chains. Looking forward, cities in Gilliam County could seek to accommodate some or all of the target clusters listed below.

Exhibit 20: Target Employment Clusters

Target Use	Market Potential	Relative Wage Rates	Potential Job Creation	Recommended Target Industry for Cities for Gilliam County
General manufacturing and vehicle maintenance	●	●	●	☑
Value-added Agriculture Mfg.	●	●	●	☑
Renewable Energy	●	●	●	☑
Waste By Products	●	●	●	☑
Tourism & Recreation	●	●	●	☑
Home Based Businesses	●	●	●	☑
Legend:				
	Good: ●	Fair: ●	Poor: ○	

Source: FCS GROUP based on EOA findings.

III. CITY PROFILES & SITE REQUIREMENTS

In addition to information provided above, FCS GROUP undertook individual analysis of each of the major cities of Gilliam County. In order to determine the relative market strength of each city, FCS GROUP compiled information relating to infrastructure, existing employment, history, demographics, and geographic location. Using these datapoints in concert with the larger regional trends discussed previously, recommended target industries for each city are identified below along with distinguishing information which impacted the recommendations.

EMPLOYMENT LAND NEEDS

The analysis of employment land needs takes into account the projected level of job growth within the PMA region, and the potential for Gilliam County cities to attract a proportionate share of business activity. The overall findings portend continued positive growth for the region in all major job sectors, with the possible exception of government jobs which tend to be largely driven by federal and state spending patterns as well as local population growth.

Based on historic trends and related economic forecasts discussed previously, FCS GROUP expects overall private job growth within the PMA to approach 9,000 jobs over the next 20 years (high growth scenario). As indicated in **Exhibit 20**, it is anticipated that the most significant increase will be in the service sector (includes business, personal, health care and hospitality industries) with 5,156 net new jobs expected. The industrial and agricultural sectors are expected to add 3,626 jobs, and the retail sector is expected to add only 150 net new jobs, as much traditional retail is replaced by on-line non-store sales. It should be noted that these estimates exclude home-based workers, which would not require employment-zoned land.

Using population as a basis for forecasting Gilliam County's capture of commercial and service job growth, and historic industrial job growth over the past 10 years as a basis for forecasting future industrial job growth, FCS GROUP determined future job growth potential for Gilliam County for two primary categories:

- Industrial and Agriculture-related employment
- Commercial/Service employment

A range of low and high job growth capture rates have been prepared in order to determine the lower and upper-bound of projected land needs. Local city job growth forecasts assume a "fair share" allocation that takes into account current population/employment capture rates and relative market strength in attracting business investment. As indicated in **Exhibit 21**, the expected net new job growth for Gilliam County over the next 20 years equates to 490 private-sector jobs under the high forecast scenario. Projected job growth for the City of Condon includes 215 jobs over the next 20

years. Again, most of these jobs are expected to be within the industrial, agricultural and service sectors.

Using industry standards for estimated land needs based on job growth, this level of job growth is expected to require industrial and commercial zoned sites within each city as depicted in **Exhibit 21**. The employment site requirements under the high-growth scenario for each city is shown below.

Exhibit 21: 20-Year Employment and Land Needs Forecast

Projected Employment Growth Capture Rates					
	Pop	% share of PMA Region	Low Scenario	High Scenario	Notes
Gilliam County	1,910	2%			
Commercial & Service capture			2%	4%	based on emp.
Industrial & Ag capture rates			4%	6%	based on emp.
Local Cities		% share of County Pop.	Low Scenario	High Scenario	
Condon	595	31%	31%	50%	based on pop.
PMA Region	84,840				

Projected 20-year Employment Growth, High Scenario				
	Industrial & Ag.	Retail	Services	Total
PMA Region	3,626	150	5,156	8,932
Gilliam County	218	6	206	430
Local Cities				
Condon	109	3	103	215

Projected Employment Land Needs (buildable acres)				
	Industrial & Ag.	Retail	Services	Total
Jobs Per Acre	8	16	16	
Acres Required				
Condon	14	0.2	6	20

Source: derived from prior tables.

Projected 20-Year Employment Site Requirements: High Growth Scenario			
	Industrial Site Requirements	Commercial Site Requirements	Other
Condon	Three 2-acre sites & two 4-acre sites	Flex building(s) on 6 acres	Downtown infill and home-based occupations

Source: derived from prior tables.

THE CITY OF CONDON

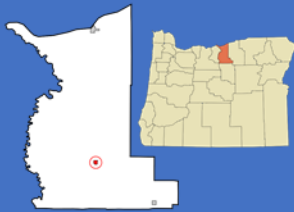


Image Source: Wikipedia

Condon serves as the seat of Gilliam County and rests on a high plateau from where the blue mountains and the cascades can be seen on clear day.

The Condon Commercial Historic District is a welcoming centerpiece to the city and historical landmark.

Of the city's recent initiatives Condon's broadband goals stand out. In 2016 the city approved a Broadband Adoption and Utilization Plan to increase broadband availability.



At a Glance

Population: 675

Number of Businesses: 71

Labor force within 45 Minutes of UGB: 228

10 – year Employment Growth Rate: 4.8%

Distance from Interstate 84: 38 Miles

Leading Sectors

1. Public Administration
2. Healthcare
3. Educational Services



Existing Assets

1. Condon State Airport
2. John Day Fossil Beds (proximity)
3. Interstate 84, Oregon Routes 19 and 206



Recommended Target Industries

1. Value-added agriculture (mfg.)
2. Value-added Waste Management
3. Renewable Energy
4. Specialty Trade Contractors
5. Tourism and Recreation

APPENDIX B

Interviews with City Officials for Lonerock and Arlington to Gauge Level of Satisfaction with Existing Employment Land Supplies

APPENDIX B
Interviews with City Officials for Lonerock and Arlington
to Gauge Level of Satisfaction with Existing Employment Land Supplies

In July 2018, the Cities of Lonerock and Arlington were invited to participate in the Gilliam County and Cities Economic Opportunities Analysis project funded by the Oregon Department of Land Conservation and Development (DLCD). Both cities declined to participate in the project. As a result, a proportionate share of the funding for the project was reallocated to accomplish additional work for Gilliam County and the City of Condon, which did participate.

DLCD desired to understand whether the Cities of Lonerock and Arlington were satisfied with their existing supply of employment land within their respective urban growth boundaries (UGBs) for being able to meet their needs for their associated 20-year planning periods. Toward that end, Anderson Perry & Associates, Inc. (AP) agreed to develop draft updated inventories of employment-type land for each city and to interview up to two elected or appointed officials and/or staff from each city to gauge each city's level of satisfaction with its buildable employment land supply.

City of Lonerock

The city limits and UGB for Lonerock are coterminous. Lonerock is planned and zoned entirely for residential use. There are no commercial, industrial, or other employment-type lands within the UGB to inventory. Consequently, AP did not create a buildable lands inventory map or develop an inventory list of vacant individual lots for Lonerock. Due to its small size (population 20), land use planning for the City is conducted by Gilliam County. A Buildable Lands Map obtained from Gilliam County's Transportation System Plan is attached as Figure B-1. Following are summaries of the interviews for the City of Lonerock.

1. Interview with Paul O'Dell, Mayor of Lonerock - June 4, 2019

Mr. O'Dell has lived in Lonerock for approximately 22 years. He thinks the City is satisfied with not having any commercial or industrial land within its city limits or UGB for the following reasons:

- The City has a population of 14 year-round residents and only about 20 when part-time residents are present.
- The size of the City is one square mile, but most of that area is used for ranching and owned by a couple of large ranches.
- The City's population is not large enough to support a business. The City gets a few visitors each year, but that is not enough to support a business.
- The City has a public water system but not a public wastewater system. Any business would need to develop an on-site sanitary system.
- Residents like the quiet and solitude the community offers.
- Condon is located only 22 miles from Lonerock and provides Lonerock residents with the ability to meet their basic shopping needs. Residents do not mind traveling 90 miles (one way) to The Dalles or Hermiston for major shopping trips, medical appointments, etc.
- Mr. O'Dell does not think the City would object if someone wanted to rezone their property to allow for a business, but cannot see that happening for the reasons listed above.

2. Interview with Tammy Forrest, City Clerk - June 7, 2019

Ms. Forrest is the City Clerk/Bookkeeper for the City of Lonerock. She has lived in Lonerock for approximately four years. Ms. Forrest thinks the City is satisfied with not having any commercial or industrial land within the city limits or UGB for the following reasons:

- Ms. Forrest indicated that about 80 percent of the current population is in their 70s and 80s. She stressed that everyone who lives in Lonerock takes very good care of their properties and is concerned that newcomers to the community may not be willing to do the same.
- Lonerock is located at the end of the road. You have to leave the same way you come in.
- Residents do not care for change. The road into Lonerock was just recently paved and several residents objected to that. Prior to being paved, the road was gravel and very much like a “washboard” in many places.
- Ms. Forrest indicated there is an old hotel in Lonerock that is no longer in use, and there used to be a store and gas station years ago. She thought the community would not be opposed if someone were to fix up the hotel and use it for something like a bed and breakfast-type business.

City of Arlington

AP created an updated buildable lands inventory map and inventory list of vacant and redevelopable commercial, industrial, and airport development lots for the City of Arlington. The Buildable Employment Lands Inventory Map and inventory list are attached as Figures B-2 and B-3. Copies of the map and inventories were provided to the City to review prior to conducting interviews. Following is a summary of the interview for the City of Arlington.

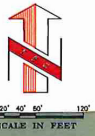
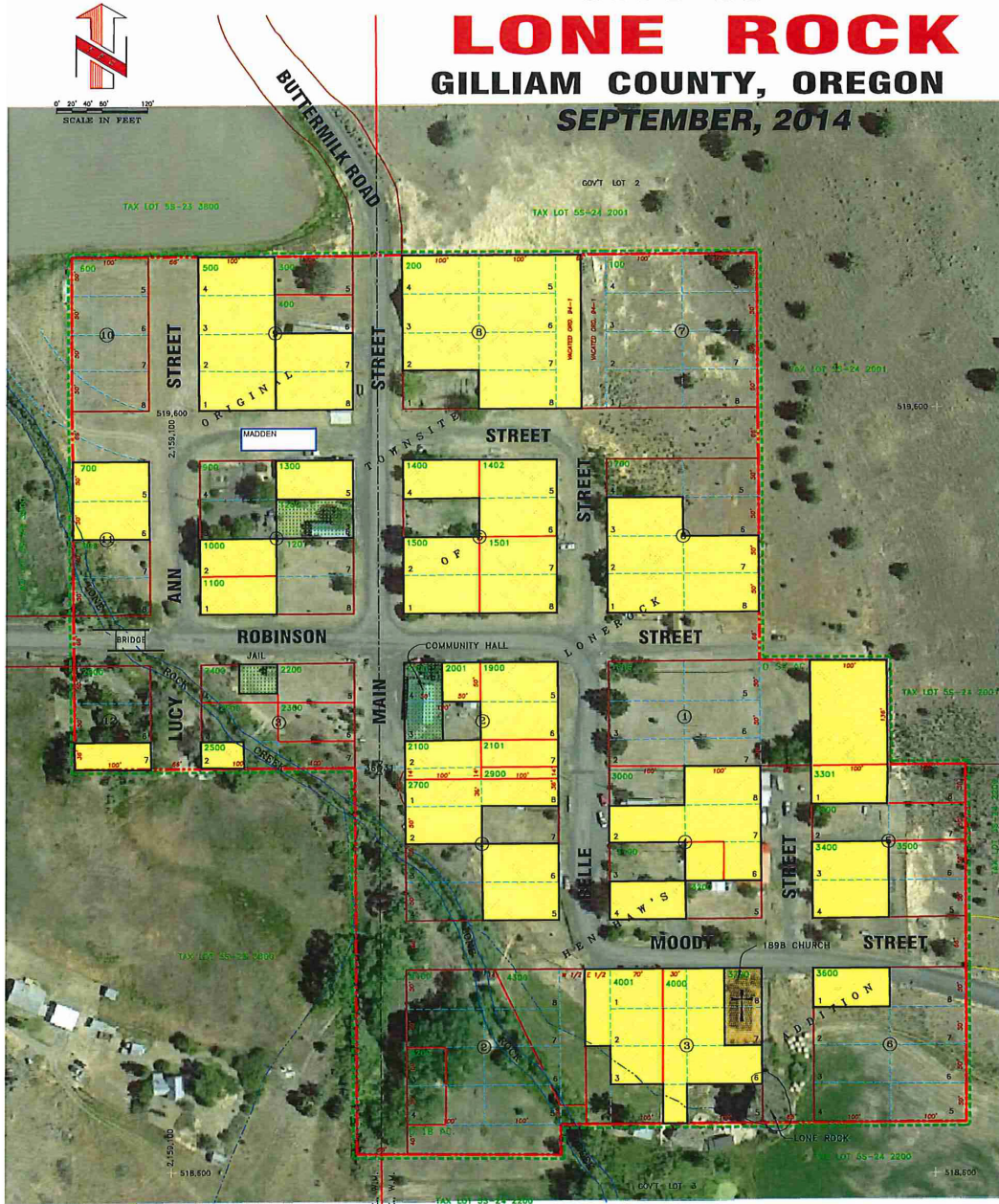
1. Interview with Pam Rosenbalm, City Recorder - June 7, 2019

AP explained during the interview that, although Arlington did not participate, based on AP’s initial inventory analysis, the City may have some justification to include additional commercially zoned land within the UGB, but likely could not justify additional industrial or airport development land at this point in time. Ms. Rosenbalm thinks the City is satisfied with its current vacant buildable lands inventory for commercial, industrial, and airport development lands for the following reasons:

- Ms. Rosenbalm explained that the City updated its Comprehensive Plan in 2015 to address the need for commercial and industrial lands and she did not see any reason why the City would want or need to go through the process again so soon. This is the same reason the City gave for not participating in the project from the beginning.
- Ms. Rosenbalm expressed that the City does not get a lot of inquiries from people wanting to open new commercial businesses, so the commercial land supply is probably adequate.

Ms. Rosenbalm indicated she would pass on information to the mayor, planning commission chair, or any other city official in case they had any further comment. No comments were received.

CITY OF LONE ROCK GILLIAM COUNTY, OREGON SEPTEMBER, 2014



LEGEND:

- BUILDABLE LAND (UNDEVELOPED)
- DEVELOPED (RESIDENTIAL) PROPERTY
- DEVELOPED PROPERTY COMMERCIAL/INDUSTRIAL
- DEVELOPED (PUBLIC) PROPERTY
- + DEVELOPED (CHURCH) PROPERTY

- LEGEND:**
- CITY LIMITS LINE (23.1 AC.)
 - URBAN GROWTH BOUNDARY

MAP OBTAINED FROM
GILLIAM COUNTY 2015
TRANSPORTATION
SYSTEM PLAN

K:\ACAD\CITY\LONE_Rock.dwg

BUILDABLE LANDS MAP

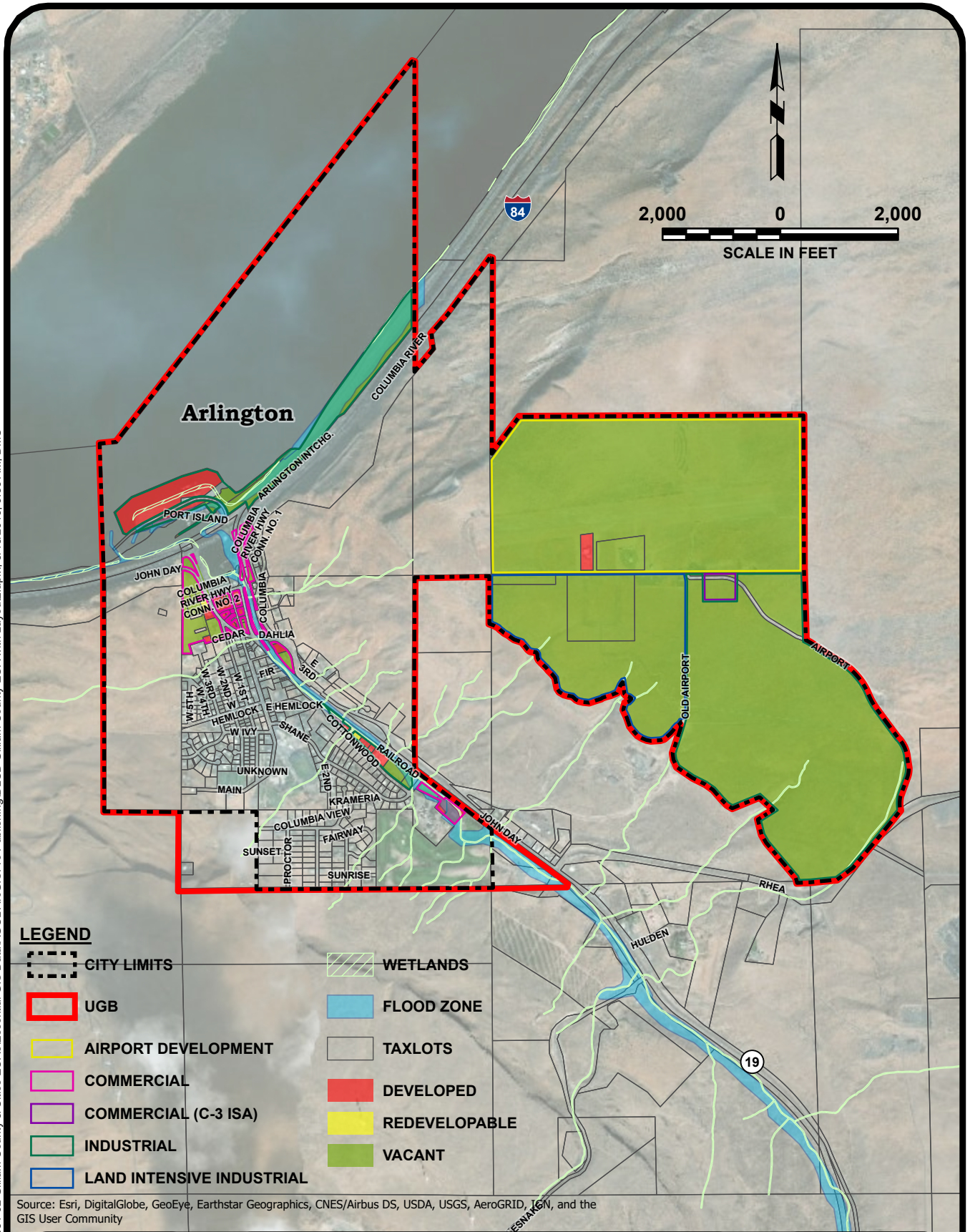
OREGON DEPARTMENT OF LAND
CONSERVATION AND DEVELOPMENT
GILLIAM COUNTY CITIES ECONOMIC OPPORTUNITIES ANALYSIS

CITY OF LONEROCK BUILDABLE LANDS MAP

FIGURE
B-1



\\LGSVR6\gis\projects\DLCD\631-02 Gilliam County & Cities EOAs\Essential GIS Data\AGOL-ArcGISPro-Publishing\DLCD Gilliam County EOA with Layout2.aprx. 6/13/2019, 9:39 AM, DMC



Source: Esri, DigitalGlobe, GeoEye, Earthstar Geographics, CNES/Airbus DS, USDA, USGS, AeroGRID, IGN, and the GIS User Community



**OREGON DEPARTMENT OF LAND
 CONSERVATION AND DEVELOPMENT**
 GILLIAM COUNTY CITIES ECONOMIC OPPORTUNITIES ANALYSIS
**CITY OF ARLINGTON - BUILDABLE
 EMPLOYMENT LANDS INVENTORY MAP**

**FIGURE
 B-2**

**INVENTORY OF DEVELOPED, REDEVELOPABLE, AND VACANT EMPLOYMENT LANDS
WITHIN THE CITY OF ARLINGTON**

Map (T-R-S)	Tax Lot	Zone	Lot Size (Acres)	Vacant (Acres)	Environmental/Physical Development Constraint	Unbuildable Vacant Area	Net Buildable Vacant Acres	Redevelopable Acres	Total Buildable Acres
AIRPORT DEVELOPMENT LANDS INVENTORY									
03N21E	702	AD	3.00						
03N21E	700	AD	303.86	237.85	Airport Approach Zones		237.85		237.85
03N21E	701	AD	10.00	3.65			3.65		3.65
Total Airport Development Acres			316.86	241.50			241.50		241.50
COMMERCIAL LANDS INVENTORY									
03N21E28	204	C-1	2.10						
03N21E28	207	C-1	1.03						
03N21E28BA	900	C-1	0.71						
03N21E28BB	700	C-1	0.38						
03N21E28BB	700	C-1	0.44						
03N21E28BB	1000	C-1	0.12						
03N21E28BB	1100	C-1	0.39						
03N21E28BB	1200	C-1	0.13						
03N21E28BB	1600	C-1	0.34						
03N21E28BB	1700	C-1	0.47						
03N21E28BB	1701	C-1	0.05						
03N21E28BB	1800	C-1	0.14						
03N21E28BB	2200	C-1	0.11						
03N21E28BB	2300	C-1	0.23						
03N21E28BB	2301	C-1	0.15						
03N21E28BB	2400	C-1	1.36						
03N21E28BB	2600	C-1	0.13						
03N21E28BB	2700	C-1	0.40						
03N21E28BB	2803	C-1	0.69						
03N21E28BB	3001	C-1	0.38						
03N21E28BB	4700	C-1	0.35						
03N21E28BB	2801	C-1	0.63					0.63	0.63
03N21E21CC	100	C-1	2.04	2.04	Slope/Ownership	2.04			
03N21E21CC	100	C-1	4.48	4.48	Slope/Ownership	4.48			
03N21E28	205	C-1	1.20						
03N21E28BA	1000	C-1	0.15						
03N21E28BB	100	C-1	1.10	1.10	Slope/Configuration	1.10			
03N21E28BB	1300	C-1	0.13						
03N21E28BB	1400	C-1	0.45						
03N21E28BB	2000	C-1	0.22	0.22			0.22		0.22
03N21E28BB	2500	C-1	0.14	0.14			0.14		0.14
03N21E28BB	2800	C-1	2.00	2.00	Slope/Ownership	2.00			
03N21E28BB	2900	C-1	0.49	0.49	Slope/Ownership	0.49			
03N21E28BB	3000	C-1	6.07	6.07	Slope/Access	6.07			
03N21E28BB	3100	C-1	1.10	1.10	Slope/Access	1.10			
03N21E28BD	800	C-1	1.37						
03N21E	501	C-3 ISA	5.18	5.18			5.18		5.18
Total Commercial Acres			36.86	22.82		17.28	5.54	0.63	6.17
INDUSTRIAL LANDS INVENTORY									
03N21E	1280	M-1	18.79						
03N21E28	702	M-1	0.64						
03N21E28BD	3500	M-1	0.25						
03N21E28BD	3501	M-1	0.14						
03N21E28DB	200	M-1	1.43						
03N21E	1280	M-1	0.50						
03N21E	1281	M-1	2.68						
03N21E28DB	201	M-1	0.37						
03N21E28DB	300	M-1	0.64						
03N21E28DB	500	M-1	0.41						
03N21E28DB	400	M-1	0.48					0.48	0.48
03N21E	102	M-1	1.25	1.25	I-84 and Railroad Right-of-Way	1.25			
03N21E	102	M-1	33.52	33.52	Railroad and River Edge	33.52			
03N21E	501	M-1	294.41	294.41			294.41		294.41
03N21E	1200	M-1	0.37	0.37	Boat Moorage Area	0.37			
03N21E	1202	M-1	0.09	0.09	Boat Moorage Area	0.09			
03N21E	1282	M-1	2.09	2.09	Harbor/Moorage Area	2.09			
03N21E	1282	M-1	1.33	1.33	Harbor/Moorage Area	1.33			
03N21E28DB	100	M-1	0.96	0.96			0.96		0.96
03N21E28DB	203	M-1	2.35						
03N21E	501	M-2	113.79	113.79			113.79		113.79
03N21E	508	M-2	30.00	30.00			30.00		30.00
03N21E	800	M-2	4.38	4.38			4.38		4.38
Total Industrial Acres			510.87	482.19		38.65	443.54	0.48	444.02



OREGON DEPARTMENT OF LAND CONSERVATION
AND DEVELOPMENT
BUILDABLE EMPLOYMENT LANDS INVENTORIES FOR CITIES
IN GILLIAM COUNTY
**INVENTORY OF DEVELOPED, REDEVELOPABLE,
AND VACANT EMPLOYMENT LANDS WITHIN THE
CITY OF ARLINGTON**

**FIGURE
B-3**