North Santiam Canyon Regional Land Inventory

SUMMARY REPORT

Prepared for:
Marion County and Business Oregon
January 9, 2017

Project No: 0612.03.01

MAUL FOSTER ALONGI

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Prepared by
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The material and data in this report were prepared under the supervision and direction of the undersigned.

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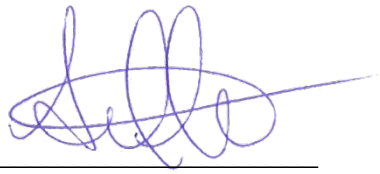

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FOLLOWING REPORT:

SUMMARY

This summary is not intended as a stand-alone document and must be evaluated in context with the entire document.

This report summarizes the work completed by Maul Foster & Alongi, Inc. (MFA) in support of the North Santiam Canyon Regional Wastewater Analysis and Land Inventory project. The project was commissioned by the Oregon Business Development Department (Business Oregon) and with financial support from Marion County on behalf of regional stakeholders, which include Marion and Linn counties, the Mid-Willamette Valley Council of Governments, and the incorporated communities of the North Santiam Canyon: Mehama, Lyons, Mill City, Gates, Detroit, and Idanha.

MFA completed a regional land inventory and redevelopment analysis that included the development of a comprehensive geodatabase, regional growth projections, and analysis of redevelopment opportunities in the canyon study area. This work was completed in parallel with a regional wastewater analysis performed by Keller & Associates), which evaluated the preliminary feasibility and cost of a regional sewer system for the canyon; and a regional health impact analysis completed by the Oregon Health Authority. The outcome of the three studies is a high-level summary of the conditions that determine economic growth and development in the study area, and a preliminary assessment of the cost and impact of implementing one of the priority improvements: a regional wastewater management system.

1 INTRODUCTION

1.1 Project Objectives

Marion County (the County) and the Mid-Willamette Valley Council of Governments (COG), in partnership with Oregon Business Development Department (Business Oregon), has embarked on a study of obstacles to community and economic development in the North Santiam Canyon (the study area). The lack of community municipal wastewater management and a commensurate over-reliance on on-site septic and small-scale sewage systems is regarded as one of the most pressing impediments to economic and population growth in the region.

A starting point for the study is a regional land inventory (inventory) of properties and existing conditions in the region. Maul Foster & Alongi, Inc. (MFA), in partnership with the economic consulting firm Elesco Limited (Elesco), has completed the inventory, which will support short- and long-range planning around issues of land use, infrastructure, real estate marketability, and redevelopment potential.

In parallel with the inventory, Keller & Associates is evaluating options for governance over a shared regional water/wastewater district (the wastewater study). This will include conceptual design for constructing wastewater systems in the study area as well as estimated costs and potential phasing of construction projects.

Work on this project was guided in part by a technical advisory committee (TAG) consisting of representatives of state and local agencies. Their assistance and advice were invaluable in refining our technical analyses of population and employment growth demand as well as developing the site suitability redevelopment matrix. We want to acknowledge the following for their role in this project:

Barb Young	Marion County Sr. Policy Analyst/Government Relations
Danielle Gonzalez	Marion County Management Analyst
James LaBar	Regional Solutions—Governor's Office
Renata Wakeley	Mid-Willamette Valley Council of Governments
Matt Knudson	Marion County Public Works
Dennis Mansfield	Marion County Public Works
Karen Homolac	Infrastructure Finance Authority—Business Oregon

Execution of the inventory has focused on these primary objectives:

- Developing an understanding of specific opportunities and constraints affecting community and economic development goals in the study area
- Using the best available data to provide the COG, study area communities, and regional stakeholders with an analytical tool to assist in appropriate and successful decision-making and prioritization of resources

Completion of the inventory has provided the following:

- An interactive Geographic Information Systems (GIS) database providing insight into priority development areas, specific properties, and catalytic projects to stimulate economic and community development in the region
- Analysis related to understanding the impact of modeling wastewater treatment options explored in a parallel wastewater study on population and employment growth projections

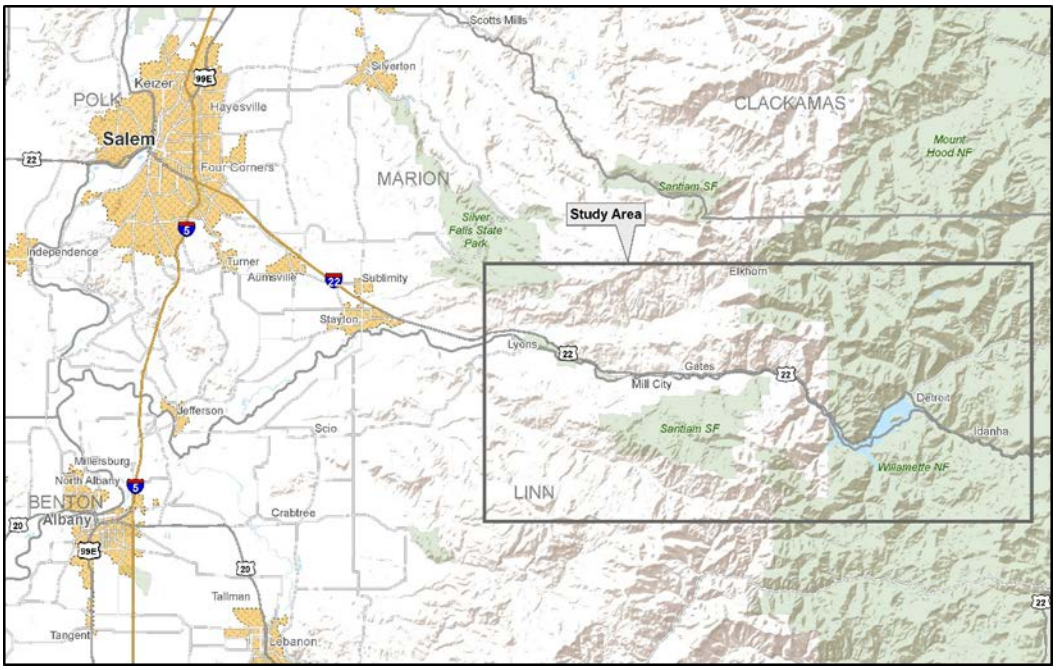
1.2 Study Area

The study area, shown on Figure 1-1, starts approximately 25 miles east of Salem along Oregon State Highway 22 and extends 31 miles farther east to the city of Idanha.

There are five communities in the study area where primarily industrial and commercial activities are conducted. For the purposes of the analysis completed for this project, the city of Lyons in Linn County was combined with unincorporated Mehama, which is a Census Defined Place for data collection. This unincorporated community is within Marion County and included by request of Mehama and the county, as a portion of the Mehama area is within the Lyons Urban Growth Boundary (UGB) and is entirely zoned for commercial uses. The other cities in the study area are Mill City, Gates, Detroit, and Idanha.

The cities of Mill City, Gates, and Idanha are partially in Marion County and partially in Linn County; only the city of Detroit is entirely in Marion County.

Figure 1-1: Location Overview Map



1.3 Scope of Work

The following tasks were completed as part of the inventory project.

1.3.1 Data Compilation and Review

The project kicked off by gathering available data from multiple sources and compiling them into a single geodatabase. The data were made available for access and use through a secure Web-based interactive map application.

1.3.2 Field Surveys

This task involved direct data gathering and analysis of the study area through property windshield surveys and targeted interviews with key area stakeholders. The purpose of this task was to gather information that was otherwise not available and/or quantifiable through existing data sets. MFA compiled and digitized hard copies of information (e.g., plans and infrastructure as-builts) pertaining to the study area but not incorporated into GIS.

1.3.3 Redevelopment Analysis

MFA and Elesco modeled growth projections to determine future land demand in the study area. These growth projections helped inform the parallel wastewater study.

MFA used the North Santiam Canyon Corridor Industrial & Commercial Land Demand Forecast (Land Demand Forecast) (see Appendix A) to assess and rank commercial and industrial properties according to readiness to develop or redevelop, using the following approach:

1. Develop typologies to sort commercial and industrial properties for modeling redevelopment options and impact.

2. Apply a Site Suitability comparative ranking matrix to show weighted scores for each typology factor and total comparative scores to rank the suitability of the types for various uses. The TAG was convened to review the data and help prioritize matrix variables.

3. Apply the matrix to the population of properties identified by typology.

4. Rank the properties according to matrix under different growth scenarios.

1.3.4 Impact Analysis

MFA was initially tasked with completing an order-of-magnitude analysis to determine potential utility demand generated by property redevelopment. As we progressed through the development of the inventory and the analysis of redevelopment, it became clear that this new demand would be included in the model generated through the wastewater study, and that it was more valuable to understand the impact of a sewer system on growth projections and land demand. Therefore, in collaboration with staff from the county and COG, MFA developed and applied an alternative "augmented" growth scenario to the Land Demand Forecast (Appendix A).

1.3.5 Project Deliverables

1.3.5.1 Interactive GIS Database of Properties

This final deliverable consists of a secure Web-based interactive map application that enables project stakeholders and partners to interact with the compiled datasets and deliverables.

In tandem with the Web application, ArcGIS file geodatabases have been provided to appropriate project partners at the county. The geodatabases consist of all supporting datasets integrated into the analysis, along with the final layers generated through project-specific analysis. The geodatabases contain appropriate metadata and is accompanied by documentation describing the methodology and analysis (summarized in Appendix B).

1.3.5.2 Land Demand Forecast and Redevelopment Matrix

Elesco completed the Land Demand Forecast (Appendix A), which modeled land demand for industrial and commercial uses, based on employment growth projections for the study area. The analysis was complemented by the impact analysis, which modeled the potential growth, based on the availability of sewer infrastructure and services in the study area. The growth projections and the Land Demand Forecast were provided to project partners to support system modeling in the wastewater study.

Working with the TAG, we sorted the commercial and industrial properties into typologies for modeling redevelopment options and impact. The typologies are based on zoning and parcel size. Our team then developed a unique site suitability comparative ranking matrix to calculate weighted scores for each typology factor and generate total comparative scores to rank the suitability of the parcels for development. MFA and the TAG reviewed and revised the comparative matrix; final scores are included in the GIS dataset.

1.3.5.3 Catalyst Property Cut Sheets

Based on the outputs of the redevelopment and impact analyses, MFA identified the highest scored properties that met the anticipated growth demands for development or redevelopment based on the output of the redevelopment site suitability matrix analysis for the baseline growth scenario. These are the properties that are considered the most generally desirable for development, based on the relative weighting established in the site suitability matrix; however, individual business requirements may identify additional criteria that were not included in this study and may not score the properties in the same way. Regional scale maps identifying the distribution of these properties are included in this report. Summary cut sheets for these properties are included as Appendix C.

2 STUDY AREA

2.1 Summary Overview

2.1.1 Communities

The analysis completed in the Land Demand Forecast (see Appendix A) and summarized in this section shows that the communities of Lyons/Mehama and Mill City have strong economic bases anchored by the manufacturing sector concentrated primarily in lumber and wood products. They are employment centers for residents of other communities, such as Gates, in the study area. While their dependence on the volatile wood-products industry puts them at risk, companies in these communities appear to have adjusted to changes in the industry and have stabilized their employment.

Put together, these two communities provide a complete range of commercial and public services to keep them self-sustaining. This will enable them to continue to draw new residents as the population in the Willamette Valley grows.

Gates is a rural residential community and there are no signs that this will change in the near future. There may be minor additions to its commercial base to service an increasing volume of tourists from the Willamette Valley. Detroit should also see increased demand for tourist commercial services in its central business district and at lakefront businesses.

Opportunities for Idanha are limited. The former mill properties likely will be purchased at some point and used primarily for transportation and warehousing facilities that would require only limited improvements to existing infrastructure.

2.1.2 Employment

Overall, total primary employment in the study area averaged 24.94 percent of the total population compared to a ratio of 42.6 percent for the whole state of Oregon. Several reasons have been cited for this disparity, including an aging labor force, more seasonal and part-time employment, and volatility in the lumber and wood products sector of the economy.

Observations of traffic flows also indicate there are significant numbers of workers who commute to jobs in Salem, Albany, and other cities along the I-5 corridor, especially from the Lyons/Mehama and Mill City communities. There is also a large population of retirees, consistent with the aging of the labor force. (See Appendix A)

2.1.3 Land Demand

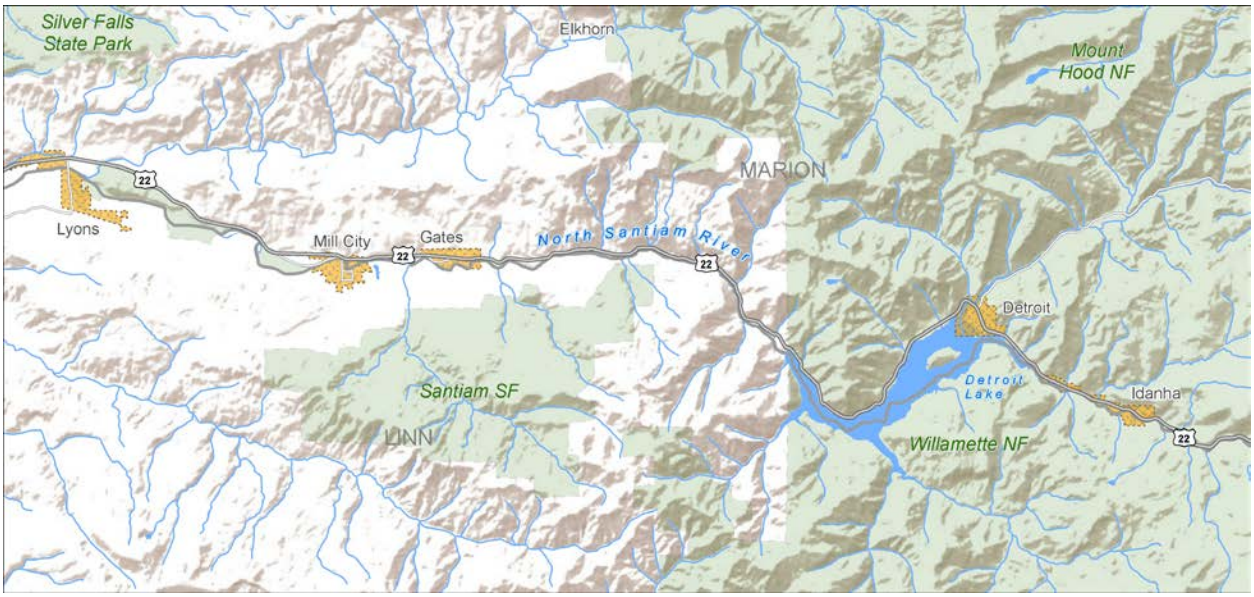
For the North Santiam Corridor, the analysis indicates that there will be demand for both industrial and commercial land over the next 20 years. Demand for industrial land is estimated at 17.0 acres under the baseline average annual growth rate (aagr) projections, and demand for commercial land is estimated at 7.4 acres, for a combined total of 24.4 acres. Under the augmented aagr assumptions, new demand would rise by 34.4 acres for industrial land and 15.0 acres for commercial land, for a combined increase of 49.4 acres.

2.2 Study Area

The study area is an eastern extension from the Salem metropolitan area in Oregon's Willamette Valley, about 50 miles south of Portland. Its main distinguishing feature is the North Santiam River, which runs through the entire study area. The cities along the corridor are all served by Oregon State Highway 22, which is a two-lane main arterial that connects at its western end with U.S. Highway 101 (also known as the Oregon Coast Highway) and, at its eastern end, with U.S. Highway 20 at Santiam Junction. U.S. Highway 20 extends eastward to Bend and points beyond. Add ODOT recent traffic Count along Hwy 22.

A geographic feature of the study area shown on Figure 2-1 is that the terrain changes significantly from the relatively flat Willamette Valley to mountainous conditions with steep slopes of 25 percent or more. That forces virtually all of the residential, commercial, and industrial development into the relatively narrow river valley.

Figure 2-1. Study Area Communities



2.3 Population

2.3.1 Description

The 2000–2015 population numbers for the five communities in the study area are shown below in Table 2-1 to provide comparison of their growth rates. Greater detail on population growth and characteristic is provided in the attached Land Demand Forecast (Appendix A).

Table 2-1: Combined Population Trends for North Santiam Study Area, 2000 to 2015

City	2000	2015	Total Δ # 2000–2015	Annual Δ % 2000–2015
Lyons/Mehama	1,301	1,452	151	0.73%
Mill City	1,563	1,855	292	1.15%
Gates	471	485	14	0.20%
Detroit	262	210	-52	-1.46%
Idanha	232	140	-92	-3.31%
TOTAL	3,829	4,142	313	0.53%

Source: 2000 U.S. Census; 2015 from PSU Certified Population Estimates 7/1/2015; projections from *Population Forecasts for Marion County, 2008*, extrapolated to 2035 and including portions of communities in Linn County.

2.3.2 Growth Projection—Baseline standard

The baseline growth rate used in the study is the 20-year growth rate produced by the Population Research Center of Portland State University and certified by the county. That report covered the period from 2010 to 2030 and the projections were extrapolated an additional five years to provide estimates for 2015 to 2035. The individual baseline aagr for each community is calculated and aggregated for a total canyon-wide population growth rate of 0.89 percent.

Table 2-2: Baseline Population Growth Projections

City	Baseline	Certified Population 2015	Population with Baseline 2035
Lyons/Mehama	1.70%	1,452	2,034
Mill City	0.50%	1,855	2,050
Gates	0.07%	485	492
Detroit	0.40%	210	228
Idanha	0.18%	140	145
Total Corridor	0.89%	4,142	4,949
Source: Land Demand Forecast (see Appendix A).			

2.3.3 Augmented Growth—with Sewer

Augmented aagrs assume an increase in the rate of population growth, based on the availability of sewer infrastructure and services. This percentage was calculated by Brandon Reich, senior planner for Marion County Public Works/Planning, and based on a survey of similarly sized and located communities. The increase in growth rate after sewer is 190 percent of the baseline aagr.

This augmented rate is applied to the baseline rate for each community in the model. Because the sewer system does not currently exist (except in Mill City, which was excluded from the augmented aagr increase) and will take time to design, permit, and construct, the model assumes that the augmented rate will not apply until year 11 (2025) of the 20-year planning period. In the augmented-rate scenario, the model shows baseline growth for years 1 through 10 and the augmented rate for years 11 through 20. This is expected to reflect a conservative and realistic growth scenario.

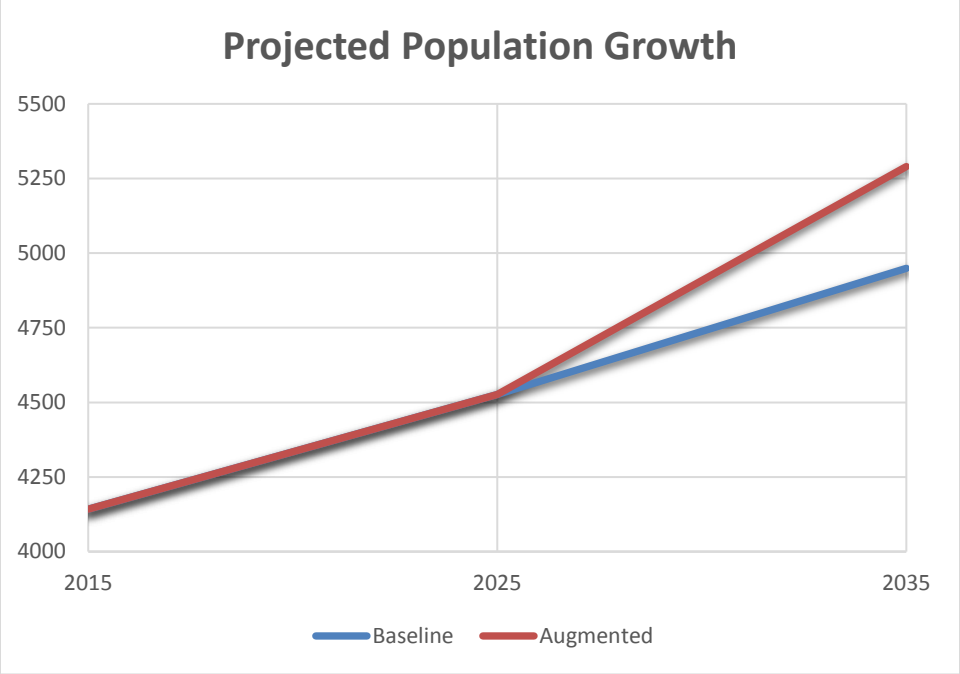
Table 2-3: Augmented Population Growth Projections

City	Baseline	Augmented Growth Rate with Sewer	Certified Population 2015	Population with Baseline 2035	Augmented Growth Rate with Sewer 2035
Lyons/Mehama	1.70%	3.23%	1,452	2,034	2,362
Mill City*	0.50%	0.50%	1,855	2,050	2,050
Gates	0.07%	0.14%	485	492	495
Detroit	0.40%	0.76%	210	228	236

City	Baseline	Augmented Growth Rate with Sewer	Certified Population 2015	Population with Baseline 2035	Augmented Growth Rate with Sewer 2035
Idanha	0.18%	0.33%	140	145	147
Total Corridor	0.89%	1.69%	4,142	4,949	5,290

*Mill City has sewer in place already and so was excluded from the augmented growth calculations.
Source: Land Demand Forecast (see Appendix A).

Figure 2-2. Projected Population Growth



2.4 Employment and Land Demand

Employed population is calculated as a ratio of total population. The statewide ratio of employment to population in Oregon is 42.6 percent. In discussions with the TAG, it was agreed to use the current rate for the study area, again calculated as a unique ratio for each community. This is reflected in the Land Demand Forecast model (see Appendix A). The average employed population percentage across the study area was rounded to 25 percent for the model. As a benchmark, this rate will be closer to the current conditions in the study area.

The numbers in Table 2-4 show that total combined primary employment in the study area increased from 848 workers in 2002 to 1,033 workers in 2014, for a gain of 185 workers and a percentage gain of 21.8 percent. That represents an average annual employment increase of 1.7 percent, even with the effects of the recession and the slow recovery that has followed.

Table 2-4: Combined Employment Numbers, 2002 and 2014

City	Total Jobs 2002	Total Jobs 2014
Lyons	559	559
Mill City	216	408
Gates	23	14
Detroit	50	47
Idanha	0	5
Total	848	1,033
Source: Land Demand Forecast (see Appendix A).		

Calculating total annual average increases at 0.89 percent over the 20-year period from 2015 to 2035 produces an estimated increase in the study area population from 4,142 in 2015 to 4,949 in 2035. However, adding the augmented growth rate due to the development of sewers in 2025 raises the total 2035 population to 5,290. That is an increase of 1,148 persons over the 20-year period versus an increase of only 807 persons at the base rate without sewers.

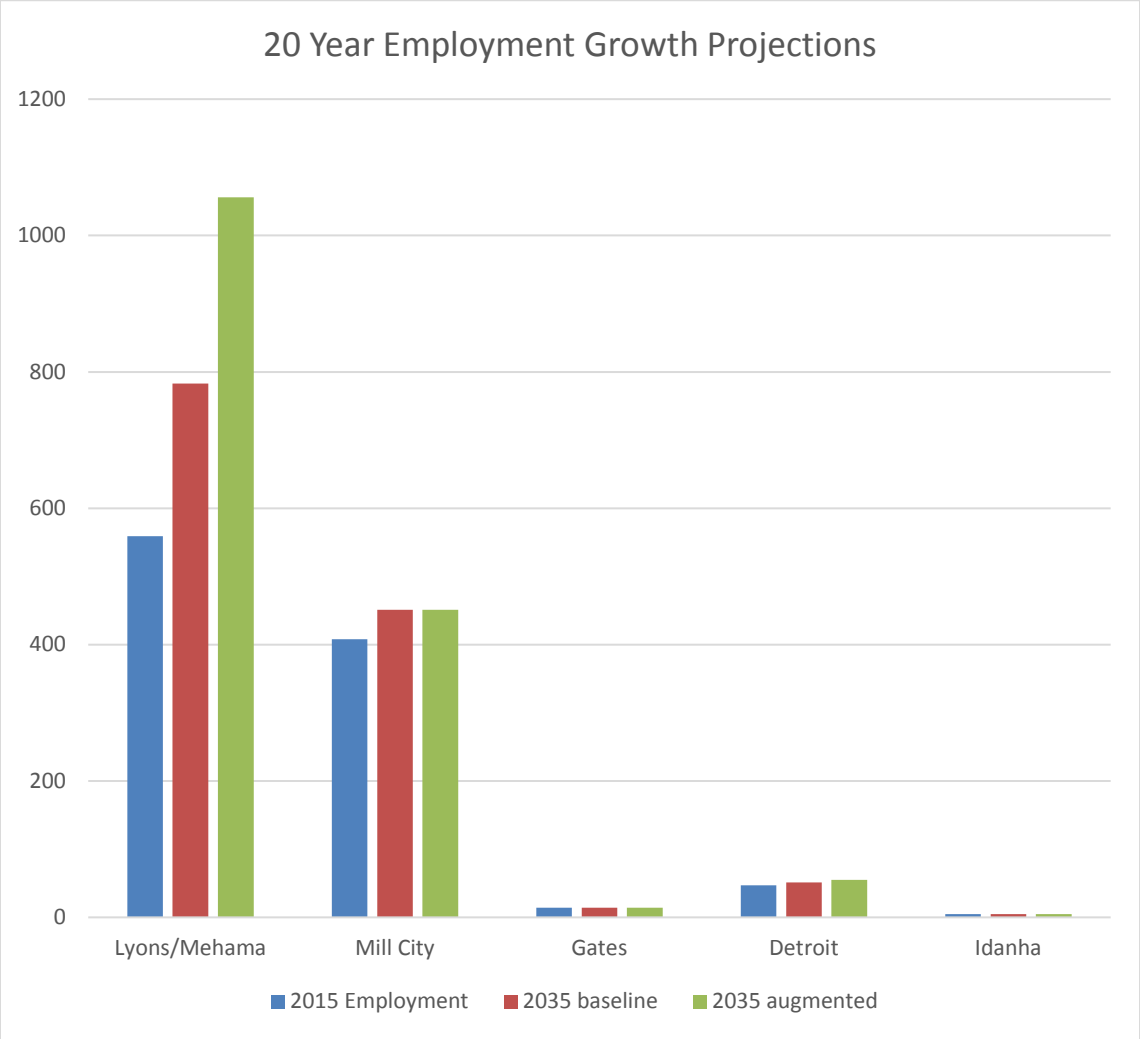
Similar estimates can be calculated for total employment in the study area over the 20-year period using the employment-to-population ratio of 25 percent.

Table 2-5: 20-Year Employment Growth Projections, 2015 to 2035

City	Employment 2015	Employed Percentage 2015	Baseline aagr 2035	Augmented aagr 2035
Lyons/Mehama	559	0.38	783	1056
Mill City	408	0.22	451	451
Gates	14	0.03	14	14
Detroit	47	0.22	51	55
Idanha	5	0.04	5	5
Total	1033	0.25	1304	1581
			Change	Change
			271	548
Source: Land Demand Forecast (see Appendix A).				

Under this scenario, applying the augmented aagr to the second half of the 20-year projection period raises total employment from 271 additional workers to 548 additional workers in 2035.

Figure 2-3. Projected Employment Growth



Based on the industrial and commercial employment projections developed in this report for the study area, those utilization factors result in the following tables of 20-year demand.

Table 2-6: Industrial and Commercial Land Requirements, 2015 to 2035, on Baseline AAGR

Land Use Type	Employment Growth	USEPA (Net Acres)	Land Demand (Net Acres)	Land Demand (Gross Acres)
Industrial	148	10	14.8	17.0
Commercial	123	20	6.2	7.4
Total	271		21.0	24.4

USEPA = U.S. Environmental Protection Agency.
Source: Land Demand Forecast (see Appendix A).

Table 2-7: Industrial and Commercial Land Requirements, 2015 to 2035, on Augmented AAGR

Land Use Type	Employment Growth	USEPA (Net Acres)	Land Demand (Net Acres)	Land Demand (Gross Acres)
Industrial	299	10	29.9	34.4
Commercial	249	20	12.5	15.0
Total	548		41.4	49.4
Source: Land Demand Forecast (see Appendix A).				

For the study area, the analysis indicates that there will be demand for both industrial and commercial land over the next 20 years. Demand for industrial land is estimated at 17.0 acres under the baseline aagr projections, and for commercial land at the estimate is 7.4 acres, for a combined total of 24.4 acres. Under the augmented aagr assumptions, new demand would rise by 34.4 acres for industrial land and 15.0 acres for commercial land, for a combined increase of 49.4 acres.

3 INVENTORY

This section summarizes the process and general methodology for compiling the source data and generating the inventory. Additional detail can be found in the technical memorandum in Appendix B.

3.1 Data Sources

GIS-formatted source data for the project were obtained from the following entities in May 2016:

- Linn County
- Marion County
- COG
- City of Detroit
- City of Gates
- City of Idanha

GIS data included tax parcel and assessor information, zoning and comprehensive plan data, rail lines, roads, city limits and UGBs, Federal Emergency Management Agency floodplains, river and stream data, and aerial imagery. Records from the Oregon Department of Environmental Quality (DEQ) Leaking Underground Storage Tank (LUST) Cleanup Site Database (as of April 5, 2016) and Environmental Cleanup Site Information (ECSI) (as of April 2016) were downloaded. Ten-meter-resolution elevation data were obtained from the U.S. Geological Survey Digital Elevation Model (2012) obtained from the Oregon Spatial Library.

Sewer and water data were obtained in paper format from each of the cities involved. Text data pertaining to environmental issues for the area were obtained from DEQ. Additional health GIS data were obtained from the Environmental Public Health Tracking Network database, Oregon Health Authority Public Health Division, for inclusion in the online viewer (for comparison purposes).

3.2 Methodology

The study area was delineated by creating a GIS polygon. The source GIS data were consolidated into an Esri filegeodatabase format, and the coordinate systems were standardized to NAD 1983 HARN State Plane International Feet (WKID 2913). DEQ text data were processed to extract the site addresses, and these were geocoded using Esri address geocoders (May 2016) and converted to point locations in the GIS database.

Paper utilities maps were scanned and georeferenced, and the general utility lines and basic attributes were digitized into GIS format.

Parcels intersecting a quarter mile buffer from a combined UGB and city limit dataset were extracted, to ensure that all appropriate parcels would be included. The two counties' datasets were merged and harmonized for selected attributes relevant to the project, and the combined dataset was then checked manually. The combined dataset formed the basis for the field inventory dataset.

Zoning datasets were updated to incorporate splitzones where needed, and comprehensive plan/zoning information was added to the parcel datasets, using a majority rules approach. In addition, the UGB and/or city that contained the parcel were added as attributes.

All sites falling in commercial or industrial zones were identified and attributed for the field inventory. Additional fields were added to allow for the capture of relevant information, such as the presence of a DEQ LUST or ECSI record in that parcel (by address location), the utilization ratio, the likely presence of water or sewer infrastructure and services at the property (based on the distance from the main lines digitized), as well as fields to be populated during the fieldwork, such as current land use, site configuration, likely brownfield status, and business type. The data were then set up in an online collector tool for field inventory.

3.3 Fieldwork and Inventory

Fieldwork (a "windshield study") was undertaken to inventory the identified commercial and industrial sites. This was conducted in a day by two MFA staff members using a tablet-based GIS collector application. This allowed staff to identify the parcel in question on a map, update a series of attributes for the parcel, and add a photograph if required. Fields populated during this assessment included an assessment of brownfield status, the business type (if applicable), a qualitative assessment of site configuration, and the general development status. A summary of the initial fieldwork is provided in Table 3-1.

Table 3-1. Field Inventory Summary

Type	Count	Acres
Total Parcels Inventoried	653	1073.16
Parcels assessed Developed	459	690.12
Parcels assessed Undeveloped	147	234.82
Parcels assessed as Vacant	43	146.93
Parcels assessed Suspect Brownfield	77	512.02
Parcels known LUST/ECSI record	14	99.47

3.4 Parcel Typologies

Working with the TAG, MFA grouped the commercial and industrial properties into typologies for modeling redevelopment options and impact.

The following formula was used to assign parcels to typologies:

Small Commercial < 0.57 acres / 25,000 sq. ft. (min .25 ac.)
Large Commercial > 0.57 acres / 25,000 sq. ft.
Small Industrial < 5 acres / 217,800 sq. ft. (min 1 ac.)
Large Industrial > 5 acres / 217,800 sq. ft.

Examples of the types of businesses that make up each typology are listed in Table 3-2.

Table 3-2. Typology and Example Businesses

Typology	Use
Small Commercial	Highway commercial Small Office—Professional Restaurant Small Service—Laundry, Dentist
Large Commercial	Grocery Store Retail Cluster Recreational Cluster
Small Industrial	Specialized Manufacturing Custom Boat Building Equipment Service and Repair
Large Industrial	Secondary Wood Products Metal Fabrication and Machinery Construction Materials Manufacturing

The assignment of typologies and criteria resulted in a significant reduction in the number of parcels used as analysis properties (mainly because the parcel-size criteria excluded a large number of small parcels from consideration, but also from exclusion of parcels not within an identified city limit or UGB). A summary of the inventoried parcels used for analysis is provided in Table 3-3.

Table 3-3. Typology Summary

Type	Count	Acres
Total Parcels	281	902.82
Parcels assessed Developed	208	598.03
Parcels assessed Undeveloped	51	162.07
Parcels assessed Vacant	22	142.71
Parcels assessed Suspect Brownfield	55	493.42
Parcels known LUST/ECSI record	9	91.72
Highway Access	116	303.44
Parcels with Utility access	143	123.95

A detailed summary of the typology parcels is given in Table 3-4, which breaks down each of the typologies and describes the acreage and square footage totals for key metrics. For a detailed breakdown of the data, please refer to the attached Summary Tables section.

Table 3-4. Summary Statistics by Typology

ALL PROPERTIES	Commercial (Large)		Commercial (Small)		Industrial (Large)		Industrial (Small)	
	(Acres)	(Sq. Ft.)	(Acres)	(Sq. Ft.)	(Acres)	(Sq. Ft.)	(Acres)	(Sq. Ft.)
Criteria	> 0.57/ 25,000		< 0.57 / 25,000 (min .25 ac)		> 5 / 217,800		< 5 / 217,800 (min 1 ac)	
No. of Properties	67		152		28		34	
Average Parcel Size	2.94	128066	0.37	16117	20.53	894286	2.23	97138
Min Parcel Size	0.57	24829	0.25	10890	5.02	218671	1	43560
Max Parcel Size	45.1	1964556	0.57	24829.	108.6	4730616	4.65	202554
Developed Land								
No. of Properties	45		122		20		21	
Total Acreage	62.81	2736004	44.61	1943212	447.87	19509217	42.74	1861754
Average Parcel Size	1.4	60984	0.37	16117	22.4	975744	2.04	88862
Undeveloped Land								
No. of Properties	14		21		5		11	
Total Acreage	51.97	2263813	7.83	341075	77.36	3369801	24.91	1085080
Average Parcel Size	3.71	161608	0.37	16117	15.47	673873	2.26	98445
Vacant Land								
No. of Properties	8		9		3		2	
Total Acreage	82.71	3602848	3.33	145055	49.51	2156655	7.16	311890
Average Parcel Size	10.34	450410	0.37	16117.2	16.5	718740	3.58	155945
No. Suspect Brownfields	10		15		18		12	
No. LUST/ECSI	1		4		4		0	
No. on Highway	40		60		8		8	
No. with Utility Access	40		98		3		2	

4 REDEVELOPMENT ANALYSIS

4.1 Summary of Analysis

4.1.1 Redevelopment Matrix

The site suitability redevelopment matrix was developed to sort and rank properties, based on variables affecting the general development desirability of the property for its zoned use. Each matrix and the variables involved is described below.

4.1.1.1 Variables

The variables used for ranking the properties are listed in the matrix table (Table 4-1) below, along with the weighting applied. A positive weighting reflects a positive impact of that variable, a negative weighting reflects the opposite. A neutral variable (or one excluded from consideration) would have a weighting of 0. Water and sewer access was assigned as a positive if the property has access (or assumed access), and a negative if it did not (or was assumed not).

The matrix was developed and adjusted for two different ranking scenarios:

1. Baseline Growth Scenario: Growth occurs as forecast, with no additional sewer system in place.

2. Augmented Growth Scenario: Growth occurs as forecast in the case of a sewer system being built in the study area (e.g., water and sewer access was assumed for all properties).

Table 4-1: Summary of Redevelopment Matrix Scenarios

Matrix	Baseline	Augmented
Variable	*Weighting*	*Weighting*
Underutilized	0	0
Undeveloped	+1	+1
Vacant	+1	+1
Suspect Brownfield	-1	-1
LUST/ECSI	-2	-2
Water Utility	-1 / +1	+1 / +1
Sewer Utility	-1 / +1	+1 / +1
Visibility (Commercial)	+1	+1
Highway Access (Industrial)	0	0
Distance to I-5 (Industrial) (20 mi)	+1	+1
Good Site Configuration	+1	+1

4.1.1.2 Ranking

The output of the matrix calculations was a rank for each property. This allows identification of a parcel's general level of desirability in terms of development in comparison to other parcels in the study area. In general, a higher rank indicates that the parcel could be considered more desirable from a development standpoint. The ranking is subjective and does not incorporate specific business needs, the cost of the property, or the land preparation that may be required.

Using the Land Demand Forecast, the highest-ranked properties that would meet that demand were identified to determine if capacity was available, and indicate likely locations for development to occur. Typologies were assigned to the estimated land demand, using the following ratios: Large Industrial 65 percent, Small Industrial 35 percent; Large Commercial 25 percent, Small Commercial 75 percent, in line with estimates generated by Elesco. Properties were selected until the projected land demand acreage was met or exceeded (all properties with the same rank were added each time to reflect the equal consideration of variables).

4.2 Evaluation and Identification of Catalyst Properties

The properties identified as the most desirable for development and meeting the baseline growth scenario projected demand are considered to be catalyst properties. While not the only properties with a high potential for development, those identified are considered to be generally easily developable for a range of activities, and likely to be more readily available and without significant visible restrictions that would delay development.

A further comparison was conducted to estimate the impact of a sewer system in the study area on the desirability of industrial and commercial zoned parcels. In this case the difference in ranking between the baseline and augmented scenarios was calculated, with a positive difference indicating a parcel that increased in desirability following the development of a sewer system in the study area. In this last analysis, all parcels (undeveloped, vacant, and developed), were included.

To identify the catalyst properties, the total area of the highest-ranked properties (by typology) was applied to the projected demand, and if this was insufficient, the total area of the next-lowest-ranked properties was added. This continued until the projected demand was met or exceeded. The properties ranked for development were located inside city UGBs. There may be alternative properties, not involved in the study, on federal or state lands surrounding the communities but it was assumed in this study that properties within a UGB are most appropriate for development.

The total acreage of catalyst properties identified in the baseline growth scenario is shown in Table 4-2.

Table 4-2. Count of Catalyst Properties

UGB	Typology	Count	Acres
Total	Large Commercial	4	2.86
Total	Small Commercial	19	7.13
Total	Large Industrial	2	12.72
Total	Small Industrial	5	10.58

See the matrix calculations section for further information on the variables and weighting.

4.3 Property Cut Sheets

Following the identification of the catalyst properties, a one-page summary of each was developed. The purpose of these "cut sheets" is to generate discussion and consideration of the type of properties available, and allow stakeholders to more easily visualize, assess, and compare the properties identified as meeting the forecast demand. Each cut sheet includes the property ranking (baseline score) from the matrix calculation, as well as summary information about the property, including the acreage, assessed value, average slope, zoning and typology, and field data collected. A map of the property and its overall location, along with a photograph (if available), are included. While useful, the cut sheets do not represent the only properties that could be considered desirable for all potential business uses in the study area, and should not be considered an endorsement of any particular property, nor should it be inferred that the property is available for development or on the market.

5 IMPLICATIONS

The purpose of the inventory was to support community and economic development initiatives such as the wastewater study. This project was not intended to evaluate specific initiatives or evaluate economic opportunities (for a better overview of those issues, see the North Santiam Canyon Economic Opportunity Study [COG, 2014]). However, it is clear from the redevelopment analysis completed through this project that the study area communities are not necessarily achieving their full potential and that a range of issues presents legitimate challenges. The analysis presented in this report attempts to make the case that the study area includes properties that will be highly developable under certain foreseeable conditions and especially after investments are made in improving infrastructure and formalizing an economic development strategy.

Based on our observations, analysis, research, and engagement with local stakeholders (summarized in Appendix C), we offer the following strategies for addressing obstacles to development in the study area. The following recommendations are based on the best professional judgment of this report's authors. They do not reflect the outcome of a focused market and business development plan, which is included in the recommendations.

5.1 Recommended Strategy

5.1.1 Rural Regional Visioning

Set up an event or series of events to bring community members together to undergo "right-sized" regional visioning. Planning to determine potential tourism/recreation related growth (emergency response, housing/accommodation, food & beverage, transportation, public services) and cost impact associated with continued growth in that industry. Develop a unified long-range vision(s) for the study area. Community buy-in to community and economic development projects (such as a regional wastewater system) is crucial to success.

5.1.2 Regional Marketing Strategy

- Create a unique identity for the North Santiam Canyon and market all of the communities together as part of that region. Consider building the identity around recreation and livability. Create a regional marketing coalition.
- Inventory and promote all of the recreational and environmental advantages of the region, such as campgrounds, parks, hiking trails, fishing, and boating. Plan and develop opportunities for targeted activities such as mountain biking.
- Develop a unified marketing strategy including a Web site, flyers and brochures, billboards, and other tourism advertising.

5.1.3 Improvement and Redevelopment

- Persuade local communities to focus on cleanup and dress-up projects. Consider storefront improvement and other beautification programs to give the communities a physical uplift and present a vibrant face to visitors.
- Address vacant and underutilized properties. Consider developing a regional brownfield land bank authority to take ownership of orphaned and foreclosed brownfield properties. Allow the transfer of legacy industrial properties to public ownership so that they can be cleaned up and used for public purposes or sold for private development.

5.1.4 Business Development

- Develop a strategic business plan for short- and long-term initiatives. Coordinate this with all regional stakeholders to ensure a consistent message and vision.
- Promote and support entrepreneurial business development. Create a shared-space working facility (incubator or maker space) to support tech development, arts and crafts, and other homegrown opportunities.
- Use the inventory to promote and market the study area to attract businesses. Promote those through Business Oregon and the real estate community.

5.1.5 Regional Investment Board

We echo the recommendation, provided by the COG in its 2014 Economic Opportunity Study, that a Regional Investment Board be established:

> to provide a regional decision-making mechanism for establishing investment priorities and monitoring the effectiveness of investments in the region. The board will also provide a means for improving communications between, and among, the communities and interests within the region on development matters.

LIMITATIONS

The services undertaken in completing this report were performed consistent with generally accepted professional consulting principles and practices. No other warranty, express or implied, is made. These services were performed consistent with our agreement with our client. This report is solely for the use and information of our client unless otherwise noted. Any reliance on this report by a third party is at such party's sole risk.

Opinions and recommendations contained in this report apply to conditions existing when services were performed and are intended only for the client, purposes, locations, time frames, and project parameters indicated. We are not responsible for the impacts of any changes in environmental standards, practices, or regulations subsequent to performance of services. We do not warrant the accuracy of information supplied by others, or the use of segregated portions of this report.

SUMMARY TABLES

Augmented Property Information

TAXLOT ID	Typology	ACRES	ZONING	Prop Class Code Descr	LAND VAL	IMPR VAL	TOTAL VAL	Utilization Ratio	AGOL UGB	AGOL CITY LIMIT	Status	Land Use	Storefront Appeal
093E27DA01700	Small Commercial	0.34926188	Commercial	RESIDENTIAL IMPROVED-COMM ZONE	61450	23680	85130	0.385354012	Gates	Gates	Vacant	Commercial	Poor
093E27DB01100	Large Commercial	0.622948064	Commercial	COMMERCIAL IMPROVED	66960	2000	68960	0.02986858	Gates	Gates	Undeveloped	Open Space	
093E27DD00900	Large Commercial	0.574706851	Commercial	COMMERCIAL VACANT	59980	0	59980	0	Gates	Gates	Undeveloped	Open Space	
093E30C 00601	Large Commercial	9.392738162	Commercial	RURAL SPECIAL IMPROVED	7920	0	18490	0	Mill City	Mill City	Undeveloped	Open Space	
093E30DB02500	Small Commercial	0.369841942	Commercial	COMMERCIAL VACANT	56160	0	56160	0	Mill City	Mill City	Undeveloped	Open Space	
093E30DB03401	Small Commercial	0.324188641	Commercial	COMMERCIAL VACANT	30960	0	30960	0	Mill City	Mill City	Undeveloped	Open Space	
105E01CB07500	Small Commercial	0.433131121	Commercial	COMMERCIAL VACANT	90600	0	90600	0		Detroit	Undeveloped	Open Space	
106E16CA01100	Large Commercial	8.283376614	Commercial	COMMERCIAL VACANT	155450	0	155450	0	Idahna	Idanha	Undeveloped	Open Space	
106E16CB01300	Large Commercial	11.82986489	Commercial	COMMERCIAL VACANT	204130	0	204130	0	Idahna	Idanha	Undeveloped	Open Space	
106E16D 01400	Small Commercial	0.479132311	Commercial	COMMERCIAL VACANT	6990	0	6990	0	Idahna	Idanha	Undeveloped	Open Space	
092E18BC01000	Small Commercial	0.256886528	Commercial	RESIDENTIAL IMPROVED	64000	25660	89660	0.400937498		Mehama	Undeveloped	Commercial	
093E27CB00100	Large Industrial	18.51613505	Industrial	SPECIAL FOREST VACANT	6700	0	10920	0	Gates	Gates	Undeveloped	Open Space	
093E27DA01800	Small Commercial	0.566966408	Commercial	COMMERCIAL IMPROVED	88910	191950	280860	2.158925056	Gates	Gates	Vacant	Commercial	Fair
093E27DD00902	Small Commercial	0.285509407	Commercial	COMMERCIAL VACANT	30020	0	30020	0	Gates	Gates	Undeveloped	Open Space	
093E27DD01200	Small Commercial	0.341288145	Commercial	COMMERCIAL VACANT	54000	0	54000	0	Gates	Gates	Undeveloped	Open Space	
093E29CB02300	Small Commercial	0.383230832	Commercial	COMMERCIAL IMPROVED	60180	71590	131770	1.189597964	Mill City	Mill City	Vacant	Commercial	Poor
093E29CD02100	Small Commercial	0.498325442	Commercial	RESIDENTIAL VACANT	45960	0	45960	0	Mill City	Mill City	Undeveloped	Open Space	
093E30DA00400	Small Commercial	0.336170262	Commercial	RESIDENTIAL VACANT	35660	0	35660	0	Mill City	Mill City	Undeveloped	Open Space	
093E30DA01100	Small Commercial	0.399447938	Commercial	STATE	17180	0	17180	0	Mill City	Mill City	Undeveloped	Open Space	
106E16CA00400	Small Commercial	0.35078728	Commercial	COMMERCIAL VACANT	36000	0	36000	0	Idahna	Idanha	Undeveloped	Open Space	
106E16CA00700	Small Commercial	0.469650451	Commercial	COMMERCIAL VACANT	48000	0	48000	0	Idahna	Idanha	Undeveloped	Open Space	
106E16CB00600	Small Commercial	0.452078308	Commercial	COMMERCIAL VACANT	48000	0	48000	0	Idahna	Idanha	Vacant	Commercial	
106E16CB01200	Small Commercial	0.538536712	Commercial	COMMERCIAL VACANT	22760	0	22760	0	Idahna	Idanha	Undeveloped	Open Space	
106E17B 00700	Small Commercial	0.313403985	Commercial	STATE	16990	0	16990	0	Idahna	Idanha	Undeveloped	Open Space	
09S02E19DB02100	Small Commercial	0.294504758	Commercial	COMMERCIAL VACANT	57970	0	57970	0	Lyons	Lyons	Undeveloped	Open Space	
09S02E19C 00100	Small Industrial	3.903135437	Industrial	COUNTY RESP INDUSTRIAL, LAND & B	0	0	0	0	Lyons	Lyons	Undeveloped	Industrial	
09S03E31 00900	Large Industrial	7.210472437	Industrial	TRACT IMPROVED	118430	56420	174850	0.476399601	Mill City		Vacant	Other	
09S03E31BA00600	Small Industrial	2.64846005	Industrial	TRACT WITH MFG STRUCTURE	89920	380	90300	0.004225979	Mill City		Undeveloped	Open Space	
092E18BC02100	Small Commercial	0.289196482	Commercial	COMMERCIAL IMPROVED	43910	146930	190840	3.346163034		Mehama	Vacant	Commercial	Poor
092E18BC04300	Small Commercial	0.277918786	Commercial	COMMERCIAL IMPROVED	46620	0	46620	0		Mehama	Undeveloped	Open Space	
093E30CA01200	Small Commercial	0.264546662	Commercial	RESIDENTIAL VACANT	33000	0	33000	0	Mill City	Mill City	Undeveloped	Open Space	
106E16D 00202	Small Industrial	2.21683027	Industrial	SPECIAL FOREST VACANT	530	0	870	0	Idahna	Idanha	Undeveloped	Open Space	
106E17B 00900	Small Commercial	0.354139124	Commercial	FEDERAL	46070	0	46070	0	Idahna	Idanha	Undeveloped	Open Space	
106E22B 00200	Small Industrial	1.406407596	Industrial	TRACT VACANT >1A	44060	0	44060	0	Idahna	Idanha	Undeveloped	Open Space	Poor
106E22B 00500	Small Industrial	2.39234649	Industrial	COMMERCIAL VACANT	39850	0	39850	0	Idahna	Idanha	Undeveloped	Open Space	
09S02E19DB03100	Small Commercial	0.449276593	Commercial	RESIDENTIAL VACANT	14200	0	14200	0	Lyons	Lyons	Undeveloped	Open Space	
09S03E31AA02200	Small Commercial	0.444020164	Commercial	COMMERCIAL IMPROVED	52660	4660	57320	0.088492207	Mill City	Mill City	Vacant	Commercial	
09S02E19A 00900	Small Commercial	0.480786566	Commercial	RESIDENTIAL VACANT	10140	0	10140	0	Lyons	Lyons	Undeveloped	Open Space	
09S02E19DB02000	Small Commercial	0.31226143	Commercial	COMMERCIAL VACANT	57970	0	57970	0	Lyons	Lyons	Undeveloped	Open Space	
09S02E19BD08700	Small Commercial	0.278436271	Commercial	COMMERCIAL VACANT	55840	0	55840	0	Lyons	Lyons	Vacant	Open Space	
09S02E19BD08701	Small Commercial	0.293239587	Commercial	COMMERCIAL VACANT	36150	0	36150	0	Lyons	Lyons	Vacant	Open Space	
09S02E20C 02600	Small Industrial	1.451913659	Industrial	INDUSTRIAL VACANT	77860	0	77860	0	Lyons	Lyons	Undeveloped	Industrial	
09S02E20C 02000	Small Industrial	1.386869056	Industrial	INDUSTRIAL VACANT	69360	0	69360	0	Lyons	Lyons	Undeveloped	Open Space	
09S02E36 00101	Small Industrial	2.096040901	Industrial	VACANT TRACT	96160	0	96160	0	Mill City		Undeveloped	Other	
09S03E31BA00500	Small Industrial	3.845018318	Industrial	VACANT TRACT	69360	0	69360	0	Mill City		Undeveloped	Open Space	
093E27DA01300	Small Commercial	0.278358973	Commercial	COMMERCIAL VACANT	30320	0	30320	0	Gates	Gates	Vacant	Commercial	

Augmented Property Information

TAXLOT ID	Business Type	Tourism Primary	Site Configuration	Brownfield	Avg Slope	Distance I5 mi	Augmented Rank	Comments
093E27DA01700	None	No	Good	Non-Suspect	1.268317	30.08145653	5	
093E27DB01100		No	Good	Non-Suspect	2.73518	29.69587791	5	
093E27DD00900		No	Good	Non-Suspect	0.636721	30.03566763	5	
093E30C 00601	None	No	Good	Non-Suspect	1.358471	26.62760999	5	
093E30DB02500		No	Good	Non-Suspect	4.790418	27.07121339	5	
093E30DB03401		No	Good	Non-Suspect	2.247484	26.93721796	5	
105E01CB07500	None	No	Good	Non-Suspect	1.30764	43.00238227	5	
106E16CA01100		No	Good	Non-Suspect	3.244446	46.70834888	5	
106E16CB01300	None	No	Good	Non-Suspect	4.451275	46.45483829	5	Narrow parcel blocks access to property from road
106E16D 01400	None	No	Good	Non-Suspect	0.850077	47.00010998	5	Neighboring parcel blocks street access
092E18BC01000	None	No	Good	Non-Suspect	1.57039	20.04250327	4	
093E27CB00100		No	Good	Non-Suspect	9.569336	29.17088278	4	
093E27DA01800	None	No	Fair	Non-Suspect	1.363756	30.09406828	4	
093E27DD00902	None	No	Good	Non-Suspect	1.832122	30.06370353	4	
093E27DD01200		No	Good	Non-Suspect	1.663588	30.15364762	4	
093E29CB02300	Auto Related	No	Good	Suspect	4.263043	27.65622666	4	
093E29CD02100	None	No	Good	Non-Suspect	3.484222	27.82099186	4	
093E30DA00400	None	No	Fair	Non-Suspect	5.580475	27.18019553	4	
093E30DA01100	None	No	Poor	Non-Suspect	12.24663	27.29433047	4	Long, narrow and steep grade
106E16CA00400		No	Fair	Non-Suspect	10.66246	46.89368652	4	Flat, lots of trees
106E16CA00700		No	Fair	Non-Suspect	10.3835	46.82738465	4	
106E16CB00600		No			6.362835	46.5782861	4	Garbage collection storage
106E16CB01200	None	No	Poor	Non-Suspect	4.365722	46.55999542	4	Long narrow road front parcel
106E17B 00700	None	No	Poor	Non-Suspect	0.687367	45.46080576	4	Long and narrow parcel
09S02E36 01305	None	No	Good	Non-Suspect	1.693489	25.70679695	4	
09S01E24 01101	Timber Indust	No	Poor	Non-Suspect	1.505566	19.98914419	4	
09S02E19DB02100		No	Good	Non-Suspect	0	21.1761812	4	
09S02E19C 00100	Timber Indust	No	Good	Non-Suspect	0.773523	20.76855237	4	
09S03E31 00900	None	No	Good	Non-Suspect	0.954742	26.82871922	4	Unknown business activity, appears to be farm
09S03E31BA00600		No	Good	Non-Suspect	1.863689	26.97095175	4	
092E18BC02100	None	No	Fair	Non-Suspect	2.208303	20.08288751	3	
092E18BC04300		No		Non-Suspect	4.593102	20.06102863	3	
093E30CA01200		No	Poor	Non-Suspect	1.687823	26.86303858	3	Steep
106E16D 00202		No	Poor	Non-Suspect	18.01837	47.36770832	3	Trees
106E17B 00900	None	No	Poor	Non-Suspect	0.230433	45.41482507	3	Narrow and adjacent to river
106E22B 00200		No	Poor	Non-Suspect	13.88997	47.77076077	3	
106E22B 00500		No	Poor	Non-Suspect	5.265851	47.50443663	3	Not developable
09S02E19DB03100		No		Non-Suspect	0	21.16240636	3	
09S03E31AA02200		No	Fair	Non-Suspect	1.115601	27.57489791	3	Half parking, half field
09S02E19A 00900		No		Non-Suspect	4.694342	21.12542566	3	
09S02E19DB02000		No		Non-Suspect	0.775036	21.15733743	3	
09S02E19BD08700	None	No	Fair	Non-Suspect	0.811467	20.9547258	3	
09S02E19BD08701	None	No	Poor	Non-Suspect	1.749869	20.96006246	3	
09S02E20C 02600		No		Non-Suspect	0.920567	21.80707296	3	
09S02E20C 02000		No		Non-Suspect	0.409874	21.72098077	3	
09S02E36 00101		No	Fair	Non-Suspect	6.409228	26.45076756	3	
09S03E31BA00500		No		Non-Suspect	2.599755	26.93561595	3	
093E27DA01300		No	Fair	Suspect	0.871968	30.01346361	2	Junk yard?

Baseline Property Information

TAXLOT ID	Typology	ACRES	ZONING	Prop Class Code Descr	LAND VAL	IMPR VAL	TOTAL VAL	Utilization Ratio	AGOL UGB	AGOL CITY LIMIT	Status
093E30DB02500	Small Commercial	0.369841942	Commercial	COMMERCIAL VACANT	56160	0	56160	0	Mill City	Mill City	Undeveloped
093E30DB02700	Large Commercial	0.607336291	Commercial	COMMERCIAL VACANT	83110	0	83110	0	Mill City	Mill City	Vacant
093E30DA00400	Small Commercial	0.336170262	Commercial	RESIDENTIAL VACANT	35660	0	35660	0	Mill City	Mill City	Undeveloped
093E30DA01100	Small Commercial	0.399447938	Commercial	STATE	17180	0	17180	0	Mill City	Mill City	Undeveloped
093E27DB01100	Large Commercial	0.622948064	Commercial	COMMERCIAL IMPROVED	66960	2000	68960	0.02986858	Gates	Gates	Undeveloped
093E27DD00900	Large Commercial	0.574706851	Commercial	COMMERCIAL VACANT	59980	0	59980	0	Gates	Gates	Undeveloped
09S03E29CC00804	Large Commercial	1.055997602	Commercial	RESIDENTIAL VACANT	78480	0	78480	0	Mill City	Mill City	Undeveloped
093E30DB03401	Small Commercial	0.324188641	Commercial	COMMERCIAL VACANT	30960	0	30960	0	Mill City	Mill City	Undeveloped
105E01CB07500	Small Commercial	0.433131121	Commercial	COMMERCIAL VACANT	90600	0	90600	0		Detroit	Undeveloped
106E16D 01400	Small Commercial	0.479132311	Commercial	COMMERCIAL VACANT	6990	0	6990	0	Idahna	Idanha	Undeveloped
093E27DD00902	Small Commercial	0.285509407	Commercial	COMMERCIAL VACANT	30020	0	30020	0	Gates	Gates	Undeveloped
093E27DD01200	Small Commercial	0.341288145	Commercial	COMMERCIAL VACANT	54000	0	54000	0	Gates	Gates	Undeveloped
093E29CD02100	Small Commercial	0.498325442	Commercial	RESIDENTIAL VACANT	45960	0	45960	0	Mill City	Mill City	Undeveloped
093E29CB02300	Small Commercial	0.383230832	Commercial	COMMERCIAL IMPROVED	60180	71590	131770	1.189597964	Mill City	Mill City	Vacant
093E30CA01200	Small Commercial	0.264546662	Commercial	RESIDENTIAL VACANT	33000	0	33000	0	Mill City	Mill City	Undeveloped
106E16D 02200	Large Industrial	5.516169316	Industrial	COMMERCIAL VACANT	84580	0	84580	0	Idahna	Idanha	Undeveloped
093E27DA01700	Small Commercial	0.34926188	Commercial	RESIDENTIAL IMPROVED-COMM ZONE	61450	23680	85130	0.385354012	Gates	Gates	Vacant
09S03E31AA02200	Small Commercial	0.444020164	Commercial	COMMERCIAL IMPROVED	52660	4660	57320	0.088492207	Mill City	Mill City	Vacant
092E18BC01000	Small Commercial	0.256886528	Commercial	RESIDENTIAL IMPROVED	64000	25660	89660	0.400937498		Mehama	Undeveloped
106E16CA00400	Small Commercial	0.35078728	Commercial	COMMERCIAL VACANT	36000	0	36000	0	Idahna	Idanha	Undeveloped
106E16CA00700	Small Commercial	0.469650451	Commercial	COMMERCIAL VACANT	48000	0	48000	0	Idahna	Idanha	Undeveloped
106E16CB01200	Small Commercial	0.538536712	Commercial	COMMERCIAL VACANT	22760	0	22760	0	Idahna	Idanha	Undeveloped
106E17B 00700	Small Commercial	0.313403985	Commercial	STATE	16990	0	16990	0	Idahna	Idanha	Undeveloped
09S02E19DB02100	Small Commercial	0.294504758	Commercial	COMMERCIAL VACANT	57970	0	57970	0	Lyons	Lyons	Undeveloped
09S03E31 00900	Large Industrial	7.210472437	Industrial	TRACT IMPROVED	118430	56420	174850	0.476399601	Mill City		Vacant
09S02E36 01305	Small Industrial	2.292989778	Industrial	VACANT TRACT	59670	0	59670	0	Mill City		Undeveloped
09S01E24 01101	Small Industrial	1.267139663	Industrial	INDUSTRIAL VACANT	740	0	740	0	Lyons		Undeveloped
09S02E19C 00100	Small Industrial	3.903135437	Industrial	COUNTY RESP INDUSTRIAL, LAND & B	0	0	0	0	Lyons	Lyons	Undeveloped
09S03E31BA00600	Small Industrial	2.64846005	Industrial	TRACT WITH MFG STRUCTURE	89920	380	90300	0.004225979	Mill City		Undeveloped

Baseline Property Information

TAXLOT ID	Land Use	Storefront Appeal	Business Type	Tourism Primary	Site Configuration	Brownfield	Avg Slope	Distance I5 mi	Baseline Rank	Comments
093E30DB02500	Open Space			No	Good	Non-Suspect	4.790417647	27.07121339	5	
093E30DB02700	Open Space			No	Good	Non-Suspect	3.550458221	27.03649131	5	Buildings cleared
093E30DA00400	Open Space		None	No	Fair	Non-Suspect	5.58047545	27.18019553	4	
093E30DA01100	Open Space		None	No	Poor	Non-Suspect	12.24663236	27.29433047	4	Long, narrow and steep grade
093E27DB01100	Open Space			No	Good	Non-Suspect	2.735179931	29.69587791	3	
093E27DD00900	Open Space			No	Good	Non-Suspect	0.636721172	30.03566763	3	
09S03E29CC00804	Open Space			No	Fair	Non-Suspect	2.630309645	27.58372216	3	For sale
093E30DB03401	Open Space			No	Good	Non-Suspect	2.247483945	26.93721796	3	
105E01CB07500	Open Space		None	No	Good	Non-Suspect	1.307640251	43.00238227	3	
106E16D 01400	Open Space		None	No	Good	Non-Suspect	0.850076879	47.00010998	3	Neighboring parcel blocks street access
093E27DD00902	Open Space		None	No	Good	Non-Suspect	1.832121706	30.06370353	2	
093E27DD01200	Open Space			No	Good	Non-Suspect	1.663587887	30.15364762	2	
093E29CD02100	Open Space		None	No	Good	Non-Suspect	3.484221923	27.82099186	2	
093E29CB02300	Commercial	Poor	Auto Related	No	Good	Suspect	4.263042882	27.65622666	2	
093E30CA01200	Open Space			No	Poor	Non-Suspect	1.687822825	26.86303858	1	Steep
106E16D 02200	Open Space		None	No	Fair	Non-Suspect	6.999941562	47.24685116	1	Dirt access road
093E27DA01700	Commercial	Poor	None	No	Good	Non-Suspect	1.268316529	30.08145653	1	
09S03E31AA02200	Commercial			No	Fair	Non-Suspect	1.11560095	27.57489791	1	Half parking, half field
092E18BC01000	Commercial		None	No	Good	Non-Suspect	1.570390034	20.04250327	0	
106E16CA00400	Open Space			No	Fair	Non-Suspect	10.66245679	46.89368652	0	Flat, lots of trees
106E16CA00700	Open Space			No	Fair	Non-Suspect	10.38350401	46.82738465	0	
106E16CB01200	Open Space		None	No	Poor	Non-Suspect	4.365721828	46.55999542	0	Long narrow road front parcel
106E17B 00700	Open Space		None	No	Poor	Non-Suspect	0.68736738	45.46080576	0	Long and narrow parcel
09S02E19DB02100	Open Space			No	Good	Non-Suspect	0	21.1761812	0	
09S03E31 00900	Other		None	No	Good	Non-Suspect	0.954742056	26.82871922	0	Unknown business activity, appears to be farm
09S02E36 01305	Industrial		None	No	Good	Non-Suspect	1.693489352	25.70679695	0	
09S01E24 01101	Open Space		Timber Industry	No	Poor	Non-Suspect	1.505566027	19.98914419	0	
09S02E19C 00100	Industrial		Timber Industry	No	Good	Non-Suspect	0.773523085	20.76855237	0	
09S03E31BA00600	Open Space			No	Good	Non-Suspect	1.863688939	26.97095175	0	

Inventoried Sites Typology Statistics

ALL PROPERTIES	Commercial (Large)		Commercial (Small)		Industrial (Large)		Industrial (Small)	
	(Acres)	(Sq Feet)	(Acres)	(Sq Feet)	(Acres)	(Sq Feet)	(Acres)	(Sq Feet)
Criteria	> 0.57 / 25,000		< 0.57 / 25,000 (min .25 ac)		> 5 / 217,800		< 5 / 217,800 (min 1 ac)	
# of Properties	67		152		28		34	
Avg Parcel Size	2.94	128066.4	0.37	16117.2	20.53	894286.8	2.23	97138.8
Min Parcel Size	0.57	24829.2	0.25	10890	5.02	218671.2	1	43560
Max Parcel Size	45.1	1964556	0.57	24829.2	108.6	4730616	4.65	202554
Developed Land								
# of Properties	45		122		20		21	
Total Acreage	62.81	2736003.6	44.61	1943211.6	447.87	19509217.2	42.74	1861754.4
Average Parcel Sz	1.4	60984	0.37	16117.2	22.4	975744	2.04	88862.4
Undeveloped Land								
# of Properties	14		21		5		11	
Total Acreage	51.97	2263813.2	7.83	341074.8	77.36	3369801.6	24.91	1085079.6
Average Parcel Sz	3.71	161607.6	0.37	16117.2	15.47	673873.2	2.26	98445.6
Vacant Land								
# of Properties	8		9		3		2	
Total Acreage	82.71	3602847.6	3.33	145054.8	49.51	2156655.6	7.16	311889.6
Average Parcel Sz	10.34	450410.4	0.37	16117.2	16.5	718740	3.58	155944.8
# Suspect Brownfields	10		15		18		12	
# LUST/ECSI	1		4		4		0	
# on Highway	40		60		8		8	
# with Utility Access	40		98		3		2	
Site Configuration								
# Good	33		79		18		14	
# Fair	16		24		3		4	
# Poor	7		11		1		5	
# <Null>	11		38		6		11	

Inventoried Sites Typology Statistics

LYONS	Commercial (Large)		Commercial (Small)		Industrial (Large)		Industrial (Small)	
	(Acres)	(Sq Feet)	(Acres)	(Sq Feet)	(Acres)	(Sq Feet)	(Acres)	(Sq Feet)
Criteria	> 0.57 / 25,000		< 0.57 / 25,000 (min .25 ac)		> 5 / 217,800		< 5 / 217,800 (min 1 ac)	
# of Properties	5		31		14		15	
Avg Parcel Size	0.85	37026	0.36	15681.6	22.67	987505.2	1.89	82328.4
Min Parcel Size	0.61	26571.6	0.25	10890	5.02	218671.2	1.05	45738
Max Parcel Size	1.16	50529.6	0.57	24829.2	108.61	4731051.6	4.65	202554
Developed Land								
# of Properties	3		25		12		11	
Total Acreage	2.41	104979.6	8.97	390733.2	271.05	11806938	20.4	888624
Average Parcel Sz	0.8	34848	0.36	15681.6	22.59	984020.4	1.85	80586
Undeveloped Land								
# of Properties	1		4		1		4	
Total Acreage	0.67	29185.2	1.54	67082.4	16.51	719175.6	8.01	348915.6
Average Parcel Sz	0.67	29185.2	0.38	16552.8	16.51	719175.6	2	87120
Vacant Land								
# of Properties	1		2		1		0	
Total Acreage	1.16	50529.6	0.57	24829.2	29.87	1301137.2	0	0
Average Parcel Sz	1.16	50529.6	0.28	12196.8	29.87	1301137.2	0	0
# Suspect Brownfields	0		6		12		6	
# LUST/ECSI	0		0		3		0	
# on Highway	0		0		0		0	
Utility Access - Sewer	0		0		0		0	
Utility Access - Water	0		0		0		0	
Site Configuration								
# Good	0		10		10		7	
# Fair	0		4		0		3	
# Poor	1		1		0		1	
# <Null>	4		16		4		6	

Inventoried Sites Typology Statistics

MEHAMA	Commercial (Large)		Commercial (Small)		Industrial (Large)		Industrial (Small)	
	(Acres)	(Sq Feet)	(Acres)	(Sq Feet)	(Acres)	(Sq Feet)	(Acres)	(Sq Feet)
Criteria	> 0.57 / 25,000		< 0.57 / 25,000 (min .25 ac)		> 5 / 217,800		< 5 / 217,800 (min 1 ac)	
# of Properties	6		12		2		1	
Avg Parcel Size	1.38	60112.8	0.36	15681.6	13.99	609404.4	3.86	168141.6
Min Parcel Size	0.62	27007.2	0.25	10890	8.19	356756.4	3.86	168141.6
Max Parcel Size	3.75	163350	0.53	23086.8	19.8	862488	3.86	168141.6
Developed Land								
# of Properties	6		9		2		1	
Total Acreage	8.27	360241.2	3.44	149846.4	27.99	1219244.4	3.86	168141.6
Average Parcel Sz	1.38	60112.8	0.38	16552.8	13.99	609404.4	3.86	168141.6
Undeveloped Land								
# of Properties	0		2		0		0	
Total Acreage	0	0	0.53	23086.8	0	0	0	0
Average Parcel Sz	0	0	0.27	11761.2	0	0	0	0
Vacant Land								
# of Properties	0		1		0		0	
Total Acreage	0	0	0.29	12632.4	0	0	0	0
Average Parcel Sz	0	0	0.29	12632.4	0	0	0	0
# Suspect Brownfields	3		0		2		1	
# LUST/ECSI	0		0		0		0	
# on Highway	2		2		2		1	
Utility Access - Sewer	0		0		0		0	
Utility Access - Water	0		0		0		0	
Site Configuration								
# Good	3		6		2		1	
# Fair	1		3		0		0	
# Poor	0		0		0		0	
# <Null>	2		4		0		0	

Inventoried Sites Typology Statistics

MILL CITY	Commercial (Large)		Commercial (Small)		Industrial (Large)		Industrial (Small)	
	(Acres)	(Sq Feet)	(Acres)	(Sq Feet)	(Acres)	(Sq Feet)	(Acres)	(Sq Feet)
Criteria	> 0.57 / 25,000		< 0.57 / 25,000 (min .25 ac)		> 5 / 217,800		< 5 / 217,800 (min 1 ac)	
# of Properties	25		70		6		11	
Avg Parcel Size	1.29	56192.4	0.37	16117.2	28.06	1222293.6	2.2	95832
Min Parcel Size	0.57	24829.2	0.25	10890	5.06	220413.6	1	43560
Max Parcel Size	9.39	409028.4	0.55	23958	75.07	3270049.2	3.85	167706
Developed Land								
# of Properties	17		62		4		6	
Total Acreage	16.26	708285.6	22.65	986634	132.85	5786946	10.76	468705.6
Average Parcel Sz	0.96	41817.6	0.37	16117.2	33.21	1446627.6	1.79	77972.4
Undeveloped Land								
# of Properties	5		6		1		4	
Total Acreage	13.31	579783.6	2.19	95396.4	28.32	1233619.2	10.88	473932.8
Average Parcel Sz	2.66	115869.6	0.37	16117.2	28.32	1233619.2	2.72	118483.2
Vacant Land								
# of Properties	3		2		1		1	
Total Acreage	2.77	120661.2	0.82	35719.2	7.21	314067.6	2.57	111949.2
Average Parcel Sz	0.92	40075.2	0.41	17859.6	7.21	314067.6	2.57	111949.2
# Suspect Brownfields	1		5		1		1	
# LUST/ECSI	0		3		0		0	
# on Highway	13		39		0		0	
Utility Access - Sewer	20		67		0		0	
Utility Access - Water	11		45		0		0	
Site Configuration								
# Good	13		41		2		4	
# Fair	5		9		2		1	
# Poor	2		4		0		1	
# <Null>	5		16		2		5	

Inventoried Sites Typology Statistics

GATES	Commercial (Large)		Commercial (Small)		Industrial (Large)		Industrial (Small)	
	(Acres)	(Sq Feet)	(Acres)	(Sq Feet)	(Acres)	(Sq Feet)	(Acres)	(Sq Feet)
Criteria	> 0.57 / 25,000		< 0.57 / 25,000 (min .25 ac)		> 5 / 217,800		< 5 / 217,800 (min 1 ac)	
# of Properties	11		13		1		1	
Avg Parcel Size	2.26	98445.6	0.37	16117.2	10.78	469576.8	3.04	132422.4
Min Parcel Size	0.57	24829.2	0.25	10890	3.04	132422.4	3.04	132422.4
Max Parcel Size	14.39	626828.4	0.57	24829.2	18.52	806731.2	3.04	132422.4
Developed Land								
# of Properties	6		8		0		1	
Total Acreage	6.52	284011.2	3	130680	0	0	3.04	132422.4
Average Parcel Sz	1.09	47480.4	0.38	16552.8	0	0	3.04	132422.4
Undeveloped Land								
# of Properties	3		2		1		0	
Total Acreage	2.94	128066.4	0.63	27442.8	18.52	806731.2	0	0
Average Parcel Sz	0.98	42688.8	0.31	13503.6	18.52	806731.2	0	0
Vacant Land								
# of Properties	2		3		0		0	
Total Acreage	15.35	668646	1.19	51836.4	0	0	0	0
Average Parcel Sz	7.68	334540.8	0.4	17424	0	0	0	0
# Suspect Brownfields	4		2		0		1	
# LUST/ECSI	0		1		0		0	
# on Highway	11		7		1		1	
Utility Access - Sewer	0		0		0		0	
Utility Access - Water	8		9		0		0	
Site Configuration								
# Good	7		9		1		1	
# Fair	4		3		0		0	
# Poor	0		1		0		0	
# <Null>	0		0		0		0	

Inventoried Sites Typology Statistics

DETROIT	Commercial (Large)		Commercial (Small)		Industrial (Large)		Industrial (Small)	
	(Acres)	(Sq Feet)	(Acres)	(Sq Feet)	(Acres)	(Sq Feet)	(Acres)	(Sq Feet)
Criteria	> 0.57 / 25,000		< 0.57 / 25,000 (min .25 ac)		> 5 / 217,800		< 5 / 217,800 (min 1 ac)	
# of Properties	10		17		0		0	
Avg Parcel Size	1.36	59241.6	0.38	16552.8	0	0	0	0
Min Parcel Size	0.61	26571.6	0.25	10890	0	0	0	0
Max Parcel Size	3.13	136342.8	0.53	23086.8	0	0	0	0
Developed Land								
# of Properties	10		16		0		0	
Total Acreage	13.58	591544.8	5.96	259617.6	0	0	0	0
Average Parcel Sz	1.36	59241.6	0.37	16117.2	0	0	0	0
Undeveloped Land								
# of Properties	0		1		0		0	
Total Acreage	0	0	0.43	18730.8	0	0	0	0
Average Parcel Sz	0	0	0.43	18730.8	0	0	0	0
Vacant Land								
# of Properties	0		0		0		0	
Total Acreage	0	0	0	0	0	0	0	0
Average Parcel Sz	0	0	0	0	0	0	0	0
# Suspect Brownfields	1		3		0		0	
# LUST/ECSI	1		0		0		0	
# on Highway	4		5		0		0	
Utility Access - Sewer	0		0		0		0	
Utility Access - Water	10		17		0		0	
Site Configuration								
# Good	7		12		0		0	
# Fair	2		3		0		0	
# Poor	1		1		0		0	
# <Null>	0		1		0		0	

Inventoried Sites Typology Statistics

IDAHNA	Commercial (Large)		Commercial (Small)		Industrial (Large)		Industrial (Small)	
	(Acres)	(Sq Feet)	(Acres)	(Sq Feet)	(Acres)	(Sq Feet)	(Acres)	(Sq Feet)
Criteria	> 0.57 / 25,000		< 0.57 / 25,000 (min .25 ac)		> 5 / 217,800		< 5 / 217,800 (min 1 ac)	
# of Properties	10		9		5		6	
Avg Parcel Size	11.42	497455.2	0.4	17424	8.48	369388.8	2.55	111078
Min Parcel Size	0.79	34412.4	0.25	10890	5.52	240451.2	1.03	44866.8
Max Parcel Size	45.11	1964991.6	0.54	23522.4	12.43	541450.8	4.59	199940.4
Developed Land								
# of Properties	3		2		2		2	
Total Acreage	15.77	686941.2	0.57	24829.2	15.98	696088.8	4.69	204296.4
Average Parcel Sz	5.26	229125.6	0.29	12632.4	7.99	348044.4	2.34	101930.4
Undeveloped Land								
# of Properties	5		6		2		3	
Total Acreage	35.06	1527213.6	2.5	108900	14.01	610275.6	6.02	262231.2
Average Parcel Sz	7.01	305355.6	0.41	17859.6	7.01	305355.6	2.01	87555.6
Vacant Land								
# of Properties	2		1		1		1	
Total Acreage	63.42	2762575.2	0.45	19602	12.43	541450.8	4.59	199940.4
Average Parcel Sz	31.71	1381287.6	0.45	19602	12.43	541450.8	4.59	199940.4
# Suspect Brownfields	1		0		3		2	
# LUST/ECSI	0		0		1		0	
# on Highway	10		8		5		6	
Utility Access - Sewer	0		0		0		0	
Utility Access - Water	2		2		3		1	
Site Configuration								
# Good	3		1		3		1	
# Fair	4		3		1		3	
# Poor	3		4		1		3	
# <Null>	0		1		0		0	

SEWER IMPROVED PARCEL STATISTICS 12/8/16

Total by Typology	Count	Acres
Large Commercial	57	188.49
Small Commercial	110	40.4
Large Industrial	26	529.04
Small Industrial	34	74.81
	227	**832.74**

Total by Site Status	Count	Acres
Developed	159	530.73
Undeveloped	47	159.91
Vacant	21	142.11
	227	**832.75**

Gates	Count	Acres
Large Commercial	11	24.81
Small Commercial	13	4.83
Large Industrial	1	18.52
Small Industrial	1	30.4
	26	**78.56**

Idahna	Count	Acres
Large Commercial	10	114.25
Small Commercial	9	3.53
Large Industrial	5	42.42
Small Industrial	6	15.3
	30	**175.5**

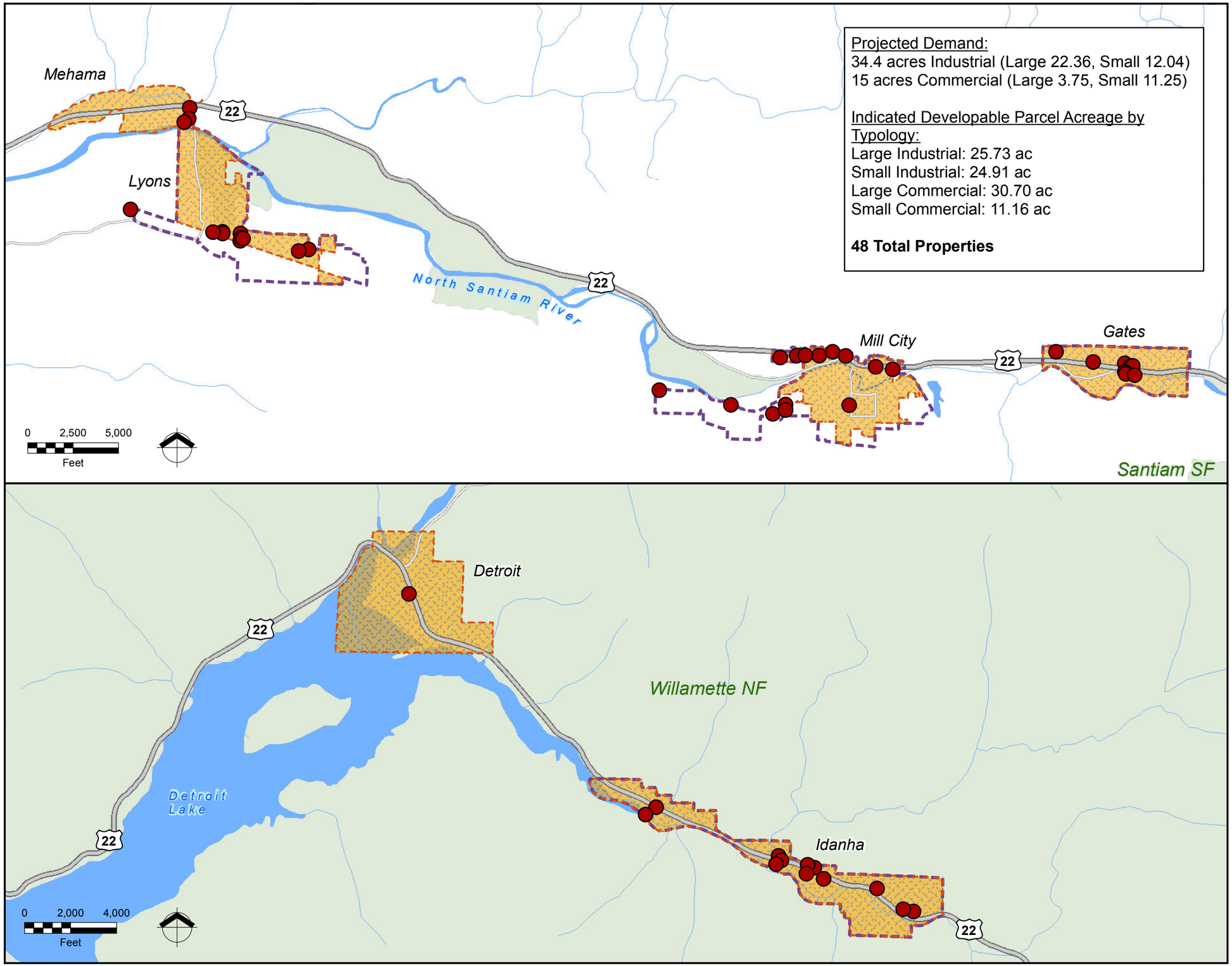
Lyons	Count	Acres
Large Commercial	5	4.24
Small Commercial	31	11.07
Large Industrial	12	271.74
Small Industrial	15	28.41
	63	**315.46**

Mill City	Count	Acres
Large Commercial	15	23.33
Small Commercial	28	10.3
Large Industrial	6	168.38
Small Industrial	11	24.21
	60	**226.22**

Detroit	Count	Acres
Large Commercial	10	13.58
Small Commercial	17	6.4
Large Industrial	0	0
Small Industrial	0	0
	27	**19.98**

Mehama	Count	Acres
Large Commercial	6	8.28
Small Commercial	12	4.27
Large Industrial	2	27.99
Small Industrial	1	3.86
	21	**44.4**

MAPS



Projected Demand:
34.4 acres Industrial (Large 22.36, Small 12.04)
15 acres Commercial (Large 3.75, Small 11.25)

Indicated Developable Parcel Acreage by Typology:
Large Industrial: 25.73 ac
Small Industrial: 24.91 ac
Large Commercial: 30.70 ac
Small Commercial: 11.16 ac

48 Total Properties

Figure
Augmented Assessment Identified Developable Parcels (Matrix 3)

Business Oregon
North Santiam River Valley, Oregon

Legend

- Identified Developable Properties
- City Limits
- Urban Growth Boundary
- Urban Area
- Parks/State & National Forests

Source: Aerial photograph obtained from Esri ArcGIS Online

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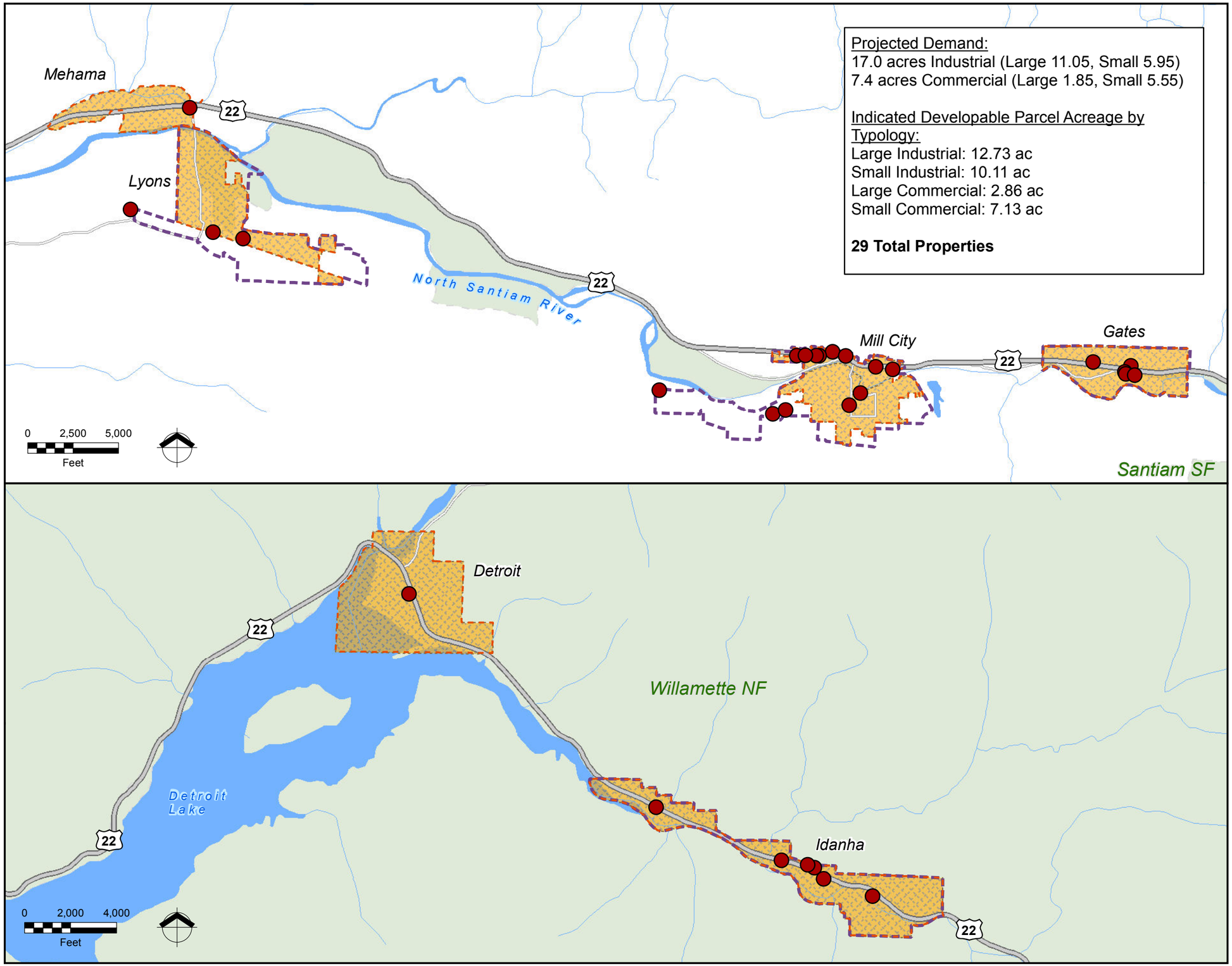
Path: X:\0612.03 Business Oregon\Projects\Fig_Baseline Identified Developable Properties_M2.mxd



Projected Demand:
17.0 acres Industrial (Large 11.05, Small 5.95)
7.4 acres Commercial (Large 1.85, Small 5.55)

Indicated Developable Parcel Acreage by Typology:
Large Industrial: 12.73 ac
Small Industrial: 10.11 ac
Large Commercial: 2.86 ac
Small Commercial: 7.13 ac

29 Total Properties

Figure
Baseline Assessment
Identified Developable Parcels (Matrix 2)

Business Oregon
North Santiam River Valley, Oregon

Legend

- Identified Developable Properties
- City Limits
- Urban Growth Boundary
- Urban
- Parks/State & National Forests

Source: Aerial photograph obtained from Esri ArcGIS Online

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Print Date: 12/20/2016
Approved By: sotto
Produced By: jschane
Project: 0612.03

Path: X:\0612.03 Business Oregon\Projects\Fig_Sewer Improved Properties.mxd

Print Date: 12/8/2016

Approved By: sotto

Produced By: jschane

Project: 0612.03

Mehama

Lyons

Mill City

Gates

Detroit

Idanha

North Santiam River

Detroit Lake

Santiam SF

Willamette NF

22

0 2,500 5,000

Feet

0 2,000 4,000

Feet

Indicated Developable Parcel Acreage by Typology:
Large Industrial: 26 properties, 529.04 ac
Small Industrial: 34 properties, 74.81 ac
Large Commercial: 57 properties, 188.49 ac
Small Commercial: 110 properties, 40.40 ac

227 Total Properties

Figure
Sewer Improved Properties
Identifying an increase in development desirability score following sewer improvements

Business Oregon
North Santiam River Valley, Oregon

Legend

- Sewer Improved Properties
- City Limits
- Urban Growth Boundary
- Urban
- Parks/State & National Forests

Source: Aerial photograph obtained from Esri ArcGIS Online

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APPENDIX A

LAND DEMAND FORECAST

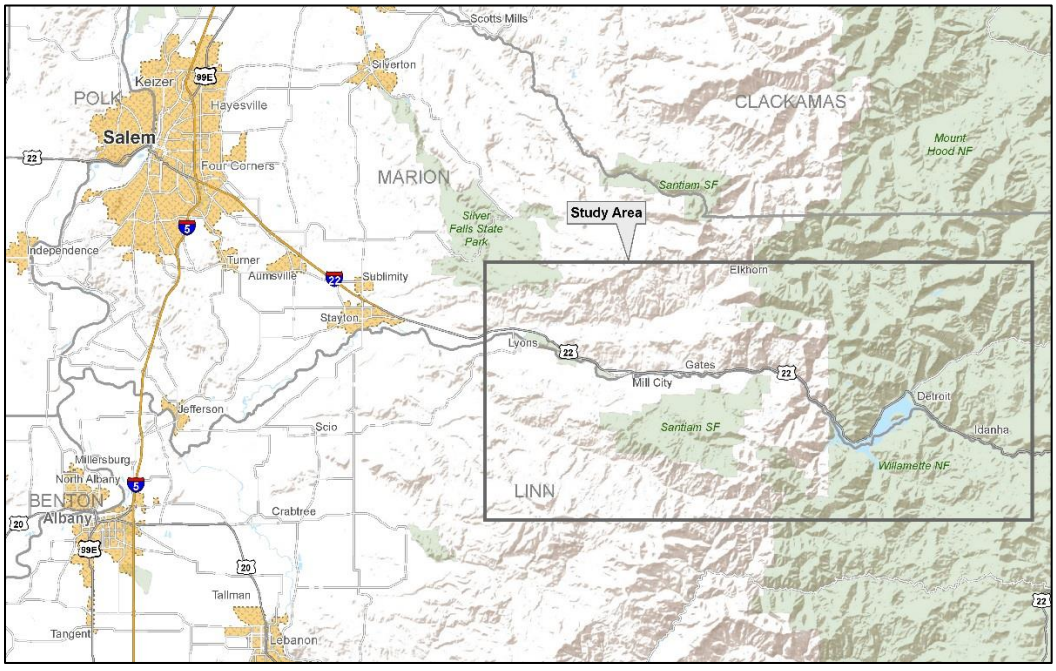
TECHNICAL MEMORANDUM

To: Seth Otto, Maul Foster & Alongi, Inc.
Prepared by: Leland F. Smith, President & Chief Economist, Elesco Limited
Re: North Santiam Canyon Corridor Industrial & Commercial Land Demand Forecast
October 17, 2016

Orientation

This Technical Memorandum is provided to Maul Foster & Alongi, Inc., (MFA) by Elesco Limited in support of the North Santiam Canyon Regional Land Inventory. Its purpose is to assess commercial and industrial land use patterns and to forecast future demand for zoned business sites served by appropriate infrastructure. The demand focus is a 20-year forecast from 2015 to 2035. The information and forecasts in this report will be used by MFA to assess the economic growth impacts of developing sewer infrastructure in the several communities.

The North Santiam Canyon Corridor, shown on Map 1, starts approximately 25 miles east of Salem along State Highway 22 and extends 31 miles farther east to the city of Idanha.



Map 1: Location Overview Map, with North Santiam Corridor Outlined

There are five communities where industrial and commercial activities are located along the Corridor. The analysis combines the city of Lyons in Linn County with unincorporated Mehama, which is a Census Defined Place (CDP) for data collection. This unincorporated community is included by request of Mehama and Marion County as a portion of the Mehama area is within the Lyons Urban Growth Boundary and is entirely zoned for commercial uses. The other cities in the study area are Mill City, Gates, Detroit, and Idanha. A location overview map is shown below with the study area outlined. It shows the location of the study area in relation to the city of Salem and the I-5 Corridor.

The cities of Mill City, Gates, and Idanha are partially in Marion County and partially in Linn County; only the city of Detroit is entirely within Marion County. This limits some of the forecast references in this model because each county has a separate methodology and time frame for its population forecasts for its urban areas.

While the larger study looks at the entire North Santiam Corridor, this analysis only examines patterns and trends of employment and land demand for the communities listed above. Oregon's land use laws generally prohibit extension of municipal utilities to serve industrial and commercial activities outside of urban growth boundaries.

Methodology

Organization of the Report

This Report is organized in three parts. Part 1 provides a general overview of recent patterns and trends of population changes along with industrial and commercial employment in each of the five communities that comprise the North Santiam Canyon Corridor. Its' purpose is to provide the base data upon which future patterns and trends can be estimated and employment projections translated into demand for industrial and commercial sites.

Recent trends in population were obtained from the U.S. Census Bureau for the year 2000 along with certified estimates of population on July 1, 2015 by Portland State University's Center for Population Research and Census (PRC).

Standard sources of employment data such as the Oregon Department of Employment, the U.S. Bureau of Labor Statistics, and the U.S. Bureau of Economic Analysis generally do not provide employment by industry sectors for small areas such as the communities in the North Santiam Corridor in order to avoid disclosing data for individual companies. For that reason, the primary source of data used in this analysis is the U.S. Census Bureau's program "On the Map" (http://onthemap.ces.census.gov/. This is an interactive tool that allows the user to define areas for examination that are not confined to certified boundaries such as city limits, zip codes, or census districts. The areas selected in this report include all concentrations of employment within city limits and/or their UGBs but are extended to capture any existing employment concentrations in rural areas adjacent to those cities.

The On the Map program provides a Work Area Profile that includes all employment data within the defined boundaries. Most of its data is drawn from Census Tracts which enables it to be comprehensive even for undefined geographical areas. This can also be tailored by specific qualifiers. For this report, only "primary" jobs are counted meaning that a person with two jobs is not counted twice. Also, the counts are for place of "work" rather than place of "residence".

Population and Employment Projections

Part 2 provides projections of population and employment for the 20-year period of 2015 to 2035 for each of the five communities along with aggregate projections for the Corridor. The analysis uses approved methodologies for making those projections and conforms to statutory requirements. Several planning staff of Marion County and the Mid-Willamette Valley Council of Governments (MWVCOG) participated in developing the models. The basis of the

population forecasts used in this report were provided by Marion County[1] with 20-year growth rates projected to the year 2030 and extrapolated to the year 2035. More details on the methodology of the forecasts are provided in the introduction to Part 2.

The only exception to this methodology was forecasting population growth rates for the city of Lyons. Based on contacts with City officials and the Oregon Cascades West Council of Governments, it was determined that an adopted forecast for Lyons was not available. As an alternative, growth rates for the three cities located between Salem and Lyons/Mehama were averaged and applied to the certified July 1, 2015 population estimate for Lyons produced by the Portland State University Population Research Center. Those three communities share the common trait with Lyons of attracting residents and economic activities from the population centers along the I-5 Corridor.

At the time this report was written, the PSU Population Research Center was in the process of developing 50-year coordinated forecasts for all cities and counties in the state of Oregon but those data were not yet available. Preliminary projections were available for only eastern and southern areas of Oregon and only at the county level. The North Santiam Corridor is part of Region 3 for the forecast project and that data will be released over the time period of July 2016 to July 2017.

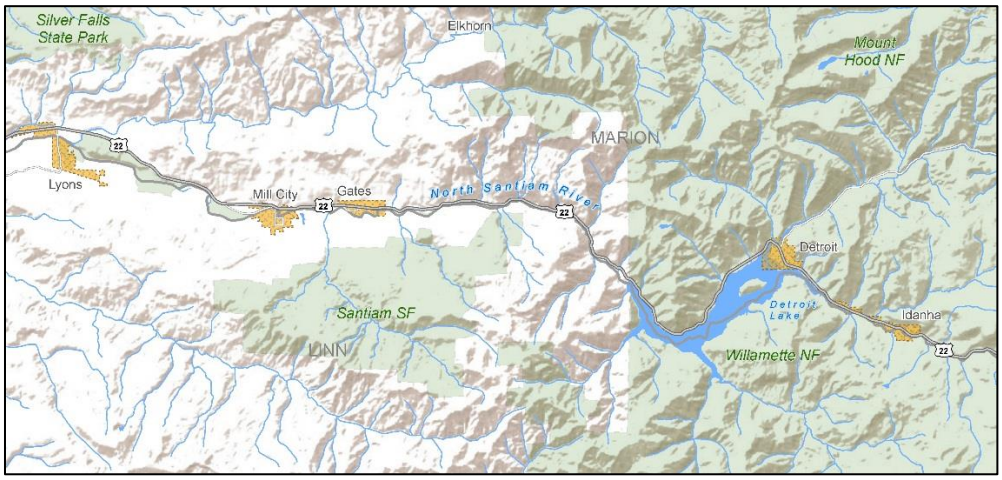
Part 3, Land Demand, was also calculated using formulas developed by collaboration with Marion County and MWVCOG planning staff. The methodology is further described in the introduction to Part 3 of this report.

[1] Population Forecasts for Marion County, its Cities and Unincorporated Area - 2010-2030. Prepared by: Population Research Center, College of Urban and Public Affairs, Portland State University, September 2008

PART 1: OVERVIEW OF RECENT POPULATION AND EMPLOYMENT PATTERNS AND TRENDS

Overview of the North Santiam Corridor

As Map 1 shows, the North Santiam Corridor is an eastern extension from the Salem Metropolitan Area in the Willamette Valley of Oregon, which is about 50 miles south of Portland. Its main distinguishing feature is the North Santiam River that runs through the entire Corridor. The cities along the Corridor are all served by Oregon State Highway 22, which is a two-lane arterial that connects with U.S. Hwy 101 (aka the Oregon Coast Highway) at its western end and with U.S. Hwy 20 at Santiam Junction at its eastern end. U.S. Hwy 20 extends eastward to Bend and points beyond.



Map 2: Locations of Cities in the North Santiam Corridor

A geographic feature of the Corridor shown on Map 2 is that the terrain changes significantly from the relatively flat Willamette Valley to mountainous conditions with steep slopes of 25% or greater. That forces virtually all of the residential, commercial and industrial development into the relatively narrow river valley.

This report looked specifically at whether there might be externalities or linkages between Salem and the I-5 Corridor with the North Santiam Corridor. Where those occur, most of the impacts are observed in Stayton and the other communities west of Lyons/Mehama and most of those are in residential development and special-purpose commercial. For example, there are two major automobile dealerships along OR 22 at Stayton that advertise their ability to sell vehicles for lower costs because they are located on lower priced land than is found in Salem. There is also expansion of population and housing eastward from Salem as residents seek lower costs and a suburban lifestyle.

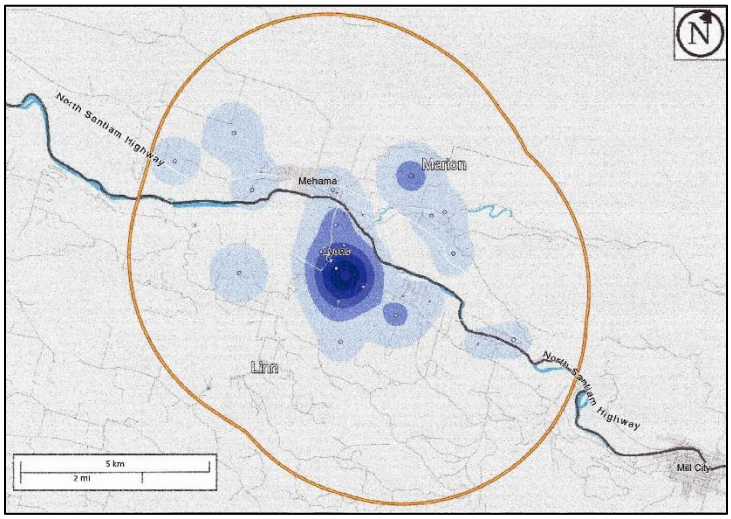
Those trends do not appear to have had any significant effects on the North Santiam Corridor at this time but are likely to do so in the future, especially in the Lyons/Mehama and Mill City areas as population grows in the Willamette Valley.

The other impact that Salem and the I-5 Corridor is having on the North Santiam Corridor is the recreational draw from the larger population of that region. The primary beneficiary of this is the city of Detroit because of its location on Detroit Lake, a major boating and fishing destination. The North Santiam River is also a prime fishing destination and there are numerous campgrounds, parks, trailheads and commercial services to meet the needs of recreational visitors.

With this overview, this report continues by examining recent patterns and trends of population growth and industrial and commercial employment in the individual communities.

LYONS/MEHAMA

Map 3: Lyons/Mehama Employment Analysis Area



Most of the employment in the Lyons/Mehama area is concentrated in the city of Lyons with several outlying smaller employment clusters. Those include a hardwood lumber mill on the north side of OR Hwy 22 in Mehama and a U.S. Forest Service complex on the North Santiam Road. The ring drawn for this analysis extends approximately two miles from the center of the city of Lyons.

Recent trends in population growth in the Lyons/Mehama area are shown in Table 1. For the year 2000, the U.S. Census numbers are combined for the City of Lyons and the Mehama CDP. For 2015, the PSU certified population number for the City of Lyons is combined with the estimated population for the Mehama CDP using U.S. Census numbers for 2000 and 2010 with the growth rate extrapolated an additional five years to 2015.

Table 1: Population Trends for Lyons/Mehama, 2000 to 2015

	2000	2015	Total Δ # 2000 - 2015	Annual Δ % 2000 - 2015
Lyons/Mehama	1,301	1,452	151	0.73%
North Santiam Study Area	3,829	4,142	313	0.53%
Oregon	3,431,100	4,001,600	570,500	1.03%

Source: 2000 U.S. Census; 2015 from PSU Certified Population Estimates 7/1/2015 for the City of Lyons, plus the extrapolated growth for Mehama CDP based on U.S. Census population numbers for 2000 and 2010.. North Santiam Study Area figures are aggregated from individual community numbers in this report. Oregon population figures from U.S. Census 2000 plus PSU certified estimates for 2015.

Table 2: Employment Profile, Lyons/Mehama Area, 2002 Compared to 2014

			LYONS/MEHAMA			
	2002		2014		Change	
Total Primary Jobs	559	100.0%	559	100.0%	0	0.0%
Jobs by NAICS Sector						
Ag., Forest, Fishing, Hunting	34	6.1%	33	5.9%	-1	-2.9%
Mining, Quarry, Oil, Gas	0	0.0%	0	0.0%	0	0%
Utilities	0	0.0%	2	0.4%	2	*200.0
Construction	16	2.9%	34	6.1%	18	112.5%
Manufacturing	396	70.8%	328	58.7%	-68	-17.2%
Wholesale Trade	23	4.1%	47	8.4%	24	104.3%
Retail Trade	20	3.6%	21	3.8%	1	5.0%
Transportation, Warehouse	7	1.3%	7	1.3%	0	0%
Information	0	0.0%	0	0.0%	0	0%
Finance & Insurance	0	0.0%	1	0.2%	1	*100.0
Real Estate, Renting & Lease	0	0.0%	3	0.5%	3	*300.0
Professional, Scientific, Tech.	3	0.5%	10	1.8%	7	133.3%
Mgt. of Companies, Enterprise.	0	0.0%	0	0.0%	0	0%
Admin. & Support, Waste Mgt.	6	1.1%	1	0.2%	-5	-83.3%
Educational Services	13	2.3%	17	3.0%	4	30.8%
Health Care & Social Assistance	1	0.2%	3	0.5%	2	200.0%
Arts, Entertainment, Recreation	0	0.0%	0	0.0%	0	0%
Accommodation, Food Service	0	0.0%	18	3.2%	18	*1800.0
Other Services	12	2.1%	9	1.6%	-3	-25.0%
Public Administration	28	5.0%	25	4.5%	-3	-10.7%

Source: On the Map profile for area selected. * Measuring an increase from zero cannot be calculated as a percentage gain. The changes shown by the asterisks in these tables indicate gains as numbers of basis points.

It is not known why employment in the Lyons/Mehama area shows the same total amount in 2014 as it was in 2002, especially since the population of Lyons increased by 11.6% during the period of 2000 to 2015. However, the jobs figures represent place of "work" so it may be that most of the population increase represents persons who commute to work in Albany or other nearby cities.

The breakdown by industrial sector shows that the Lyons/Mehama area is dominated by Manufacturing, most of it concentrated in the Lumber & Wood Products industry. Manufacturing

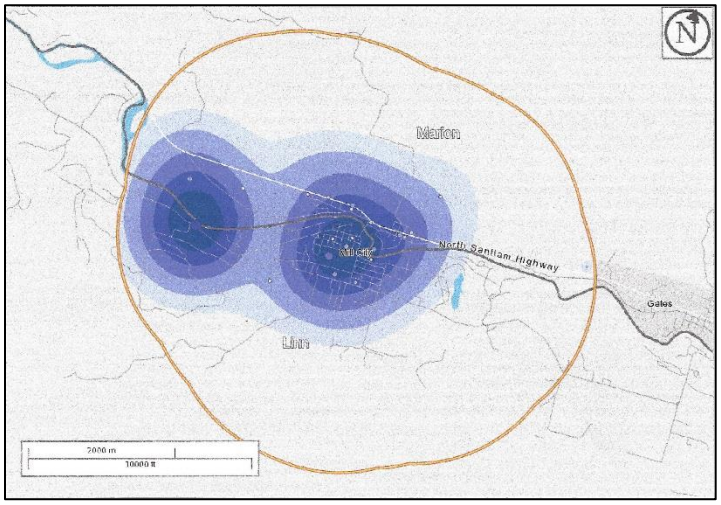
represented 70.8% of all primary jobs in 2002, falling to 58.7% in 2014. Those percentages are far greater than the statewide average of 10.4% in 2014.

The largest gainers during this period were Construction, Wholesale Trade, Professional Services, and Accommodations & Food Service.

One trend that is common to all the communities along the North Santiam Corridor is the aging of the labor force. The Lyons/Mehama area showed a 69.1% increase in the 55+ component of the work force while the 30 to 54 component grew by only 2.2% and the 29 and younger component shrank by -47.3%. This raises questions about whether the region can sustain its current employment levels as the older workers retire.

MILL CITY

Map 4: Mill City Employment Analysis Area



Mill City shows a more concentrated employment pattern than the Lyons/ Mehama area. The downtown area sits south of the North Santiam Highway but that highway also supports a strip of commercial businesses that cater to tourists passing through as well as local residents. There are several closed businesses along the highway, such as service stations, that could be redeveloped into new retail locations to serve that tourist market as population in the region and traffic volumes increase in the area.

Table 3: Population Trends for Mill City, 2000 to 2015

	2000	2015	Total Δ # 2000 - 2015	Annual Δ % 2000 - 2015
Mill City	1,563	1,855	292	1.15%
North Santiam Study Area	3,829	4,142	313	0.53%
Oregon	3,431,100	4,001,600	570,500	1.03%

Source: 2000 U.S. Census; 2015 from PSU Certified Population Estimates 7/1/2015.

Mill City had the largest population of all the communities along the North Santiam Corridor in 2015 and had an annual population growth rate higher than that for the State of Oregon. It was not determined whether any of that growth was due to annexations.

Employment figures for Mill City produce an anomaly. In an area that includes all of the city limits plus a radius of .3 miles, the Census Bureau reports there were only 215 total primary jobs in 2002 and 237 primary jobs in 2014 as measured by place of work. To get a better picture of the overall employment situation, the radius around the city was extended to 1.3 miles to include a greater part of the surrounding unincorporated area.

It was found that there are two large forest products operations southwest of the city limits – the Freres Plywood Plant #3 and a Frank Lumber Company sawmill, along with C W Specialty Lumber Company, a smaller mill. Including those operations increased primary employment at Mill City to 408 workers in 2014.

This is still well below the total number of 699 Mill City residents who worked in primary jobs in 2014 when the parameters of the analysis were shifted to place of *residence* rather than place of *work*. It is reasonable to assume that a very large number of Mill City residents commute to jobs outside of the immediate area, possibly to the mills at Lyons or even commuting to jobs in Salem or other nearby communities.

Table 4: Employment Profile, Mill City Area, 2002 Compared to 2014

			MILL CITY			
	2002		2014		Change	
Total Primary Jobs	216	100.0%	408	100.0%	192	88.9%
Jobs by NAICS Sector						
Ag., Forest, Fishing, Hunting	25	11.6%	4	1.0%	-21	-84.0%
Mining, Quarry, Oil, Gas	0	0.0%	0	0.0%	0	0.0%
Utilities	0	0.0%	0	0.0%	0	0.0%
Construction	4	1.9%	8	2.0%	4	100.0%
Manufacturing	5	2.3%	183	44.9%	178	3560.0%
Wholesale Trade	3	1.4%	0	0.0%	-3	-100.0%
Retail Trade	40	18.5%	41	10.0%	1	2.5%
Transportation, Warehouse	0	0.0%	0	0.0%	0	0.0%
Information	5	2.3%	0	0.0%	-5	-500.0%
Finance & Insurance	2	0.9%	5	1.2%	3	150.0%
Real Estate, Renting & Lease	3	1.4%	0	0.0%	-1	-300.0%
Professional, Scientific, Tech.	0	0.0%	8	2.0%	8	*800.0
Mgt. of Companies, Enterprise.	0	0.0%	0	0.0%	0	0.0%
Admin. & Support, Waste Mgt.	1	0.9%	2	0.5%	1	100.0%
Educational Services	67	31.0%	80	19.6%	13	19.4%
Health Care & Social Assistance	7	3.2%	8	2.0%	1	14.3%
Arts, Entertainment, Recreation	2	0.9%	0	0.0%	-2	-200.0%
Accommodation, Food Service	38	17.6%	49	12.0%	11	28.9%
Other Services	7	3.2%	8	2.0%	1	14.3%
Public Administration	7	3.2%	12	2.9%	5	71.4%

Source: On the Map profile for area selected.

Mill City also shows the trend of an aging work force, with the 55+ component growing by 207.7% between 2002 and 2014. Unlike the Lyons/Mehama area however, Mill City was able to capture a growing segment of its workers aged 29 and younger.

Manufacturing employment, mostly in the Lumber & Wood Products sector, showed only five employees in 2002 so the percentage growth to 183 workers in 2014 was exceptionally high. The reason for such a low figure in 2002 is not known. The nation was still in a recession that year caused by the dot.com bust in 2000 and the events of 9/11/2001 so it is possible the mills

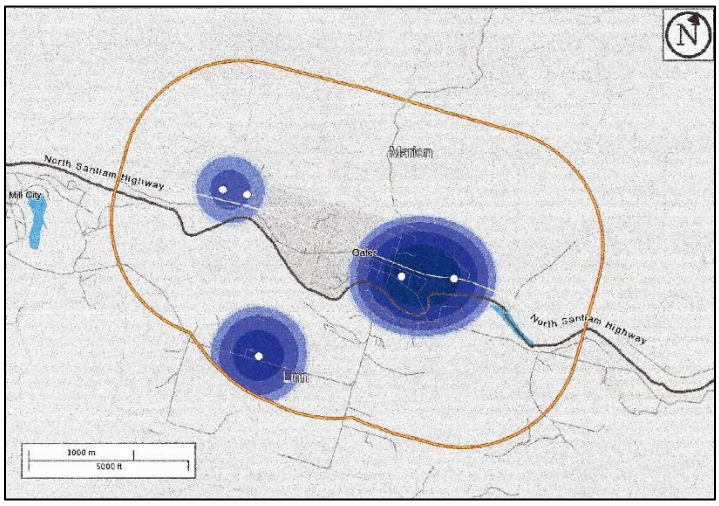
were temporarily shut down. In any case, it would not be reasonable to assume that level of growth could be sustained into the future.

Mill City has approximately double the employment in Retail Trade than was shown in the Lyons/Mehama area. That may be partly due to the commercial businesses along OR 22 that cater to tourists passing through the area. It is also possible that Mill City attracts retail traffic from Gates and Lyons.

The other notable differences are in the sectors of Educational Services and Accommodation & Food Services. These numbers indicate a relatively strong commercial sector overall for the Mill City area.

GATES

Map 5: Gates Employment Analysis Area



It needs to be noted that while the colored circles appear the same on each map, they represent different scales of employment for each community. The job density for the center of Gates represents only 10-14 primary jobs per square mile while at Lyons the center of the circle represented a job density of 582-905 primary jobs per square mile. The smaller circle at the upper left shows a maximum density at the center of only 7-9 primary jobs per square mile. The purpose of these circles is to show locations of job concentration rather than densities or comparative sizes.

Table 5: Population Trends for Gates, 2000 to 2015

	2000	2015	Total Δ # 2000 - 2015	Annual Δ % 2000 - 2015
Gates	471	485	14	0.20%
North Santiam Study Area	3,829	4,142	313	0.53%
Oregon	3,431,100	4,001,600	570,500	1.03%

Source: 2000 U.S. Census; 2015 from PSU Certified Population Estimates 7/1/2015.

The population of Gates showed an increase of only 14 persons during the period from 2000 to 2015 for an annual average growth rate of 0.20%. An aerial view of Gates shows that it is mostly a rural residential community located only 3.4 miles east of Mill City. It has a Post Office, school, and limited commercial services to serve the needs of local residents along with a motel and restaurant on OR 22 to serve highway travelers.

Table 6: Employment Profile, Gates, 2002 Compared to 2014

			GATES			
	2002		2014		Change	
Total Primary Jobs	23	100.0%	14	100.0%	-9	-39.1%
Jobs by NAICS Sector						
Ag., Forest, Fishing, Hunting	1	4.3%	0	0.0%	-1	-100.0%
Mining, Quarry, Oil, Gas	0	0.0%	0	0.0%	0	0.0%
Utilities	0	0.0%	0	0.0%	0	0.0%
Construction	2	8.7%	1	7.1%	-1	-50.0%
Manufacturing	0	0.0%	0	0.0%	0	0.0%
Wholesale Trade	0	0.0%	0	0.0%	0	0.0%
Retail Trade	0	0.0%	0	0.0%	0	0.0%
Transportation, Warehouse	0	0.0%	0	0.0%	0	0.0%
Information	0	0.0%	0	0.0%	0	0.0%
Finance & Insurance	0	0.0%	0	0.0%	0	0.0%
Real Estate, Renting & Lease	0	0.0%	0	0.0%	0	0.0%
Professional, Scientific, Tech.	0	0.0%	0	0.0%	0	0.0%
Mgt. of Companies, Enterprise.	0	0.0%	0	0.0%	0	0.0%
Admin. & Support, Waste Mgt.	2	8.7%	1	7.1%	-1	-50.0%
Educational Services	8	34.8%	0	0.0%	-8	-800.0%
Health Care & Social Assistance	0	0.0%	1	7.1%	1	*100.0
Arts, Entertainment, Recreation	0	0.0%	0	0.0%	0	0.0%
Accommodation, Food Service	8	34.8%	3	21.4%	-5	-62.5%
Other Services	1	4.3%	4	28.6%	3	300.0%

			GATES			
	2002		2014		Change	
Public Administration	1	4.3%	4	28.6%	3	300.0%

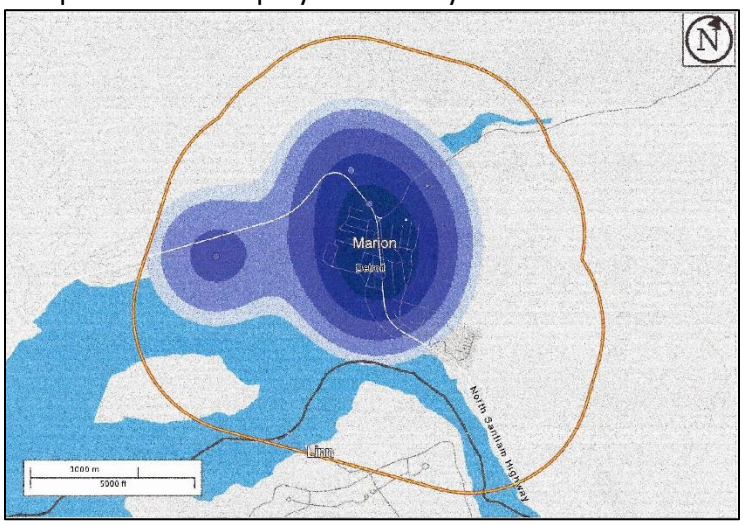
Source: On the Map profile for area selected.

The employment numbers confirm the overview above, that Gates is primarily a residential community and commercial service center. There was no manufacturing employment in either 2002 or 2014. Of the 14 primary jobs in 2014, eleven were in Accommodation & Food Service, Other Services, and Public Administration. Fourteen of the twenty sectors listed in the table showed no employment at all in 2014.

It appears that Gates supplies workers to other communities, primarily Mill City, but does not have a significant commercial / industrial base of its own.

DETROIT

Map 6: Detroit Employment Analysis Area



Detroit is often referred to as the "Detroit Recreation Area". While it is an incorporated city, the surrounding area is predominately owned by State and Federal agencies such as the BLM and Forest Service and the area has a large number of State parks, boat ramps, campgrounds, hiking trails, and other recreational amenities. It is also an important commercial service area for travelers on OR 22 between the Willamette Valley and central and eastern Oregon. The Oregon Department of Transportation operates a highway maintenance facility at Detroit and there is a major U.S. Forest Service Ranger District office located within a mile west of the community.

Table 7: Population Trends for Detroit, 2000 to 2015

	2000	2015	Total Δ # 2000 - 2015	Annual Δ % 2000 - 2015
Detroit	262	210	-52	-1.46%
North Santiam Study Area	3,829	4,142	313	0.53%
Oregon	3,431,100	4,001,600	570,500	1.03%

Source: 2000 U.S. Census; 2015 from PSU Certified Population Estimates 7/1/2015.

According to the U.S. Census of 2000 and PSU certified estimates as of July 1, 2015, the population of Detroit fell by 52 persons between those two benchmark dates. That represents a decline of just under 20% and an average annual rate of decline of 1.46%.

Table 8: Employment Profile, Detroit, 2002 Compared to 2014

			DETROIT			
	2002		2014		Change	
Total Primary Jobs	50	100.0%	47	100.0%	-3	-6.0%
Jobs by NAICS Sector						
Ag., Forest, Fishing, Hunting	0	0.0%	0	0.0%	0	0.0%
Mining, Quarry, Oil, Gas	0	0.0%	0	0.0%	0	0.0%
Utilities	0	0.0%	0	0.0%	0	0.0%
Construction	6	12.0%	7	14.9%	1	16.7%
Manufacturing	0	0.0%	0	0.0%	0	0.0%
Wholesale Trade	0	0.0%	0	0.0%	0	0.0%
Retail Trade	9	18.0%	5	10.6%	-4	-44.4%
Transportation, Warehouse	0	0.0%	0	0.0%	0	0.0%
Information	0	0.0%	0	0.0%	0	0.0%
Finance & Insurance	0	0.0%	0	0.0%	0	0.0%
Real Estate, Renting & Lease	0	0.0%	0	0.0%	0	0.0%
Professional, Scientific, Tech.	0	0.0%	0	0.0%	0	0.0%
Mgt. of Companies, Enterprise.	0	0.0%	0	0.0%	0	0.0%
Admin. & Support, Waste Mgt.	0	0.0%	5	10.6%	5	*500.0
Educational Services	0	0.0%	0	0.0%	0	0.0%
Health Care & Social Assistance	0	0.0%	0	0.0%	0	0
Arts, Entertainment, Recreation	0	0.0%	11	23.4%	11	*1100.0
Accommodation, Food Service	25	50.0%	14	29.8%	-11	-44.0%
Other Services	4	8.0%	2	4.3%	-2	-50.0%
Public Administration	6	12.0%	3	6.4%	-3	-50.0%

Source: On the Map profile for area selected.

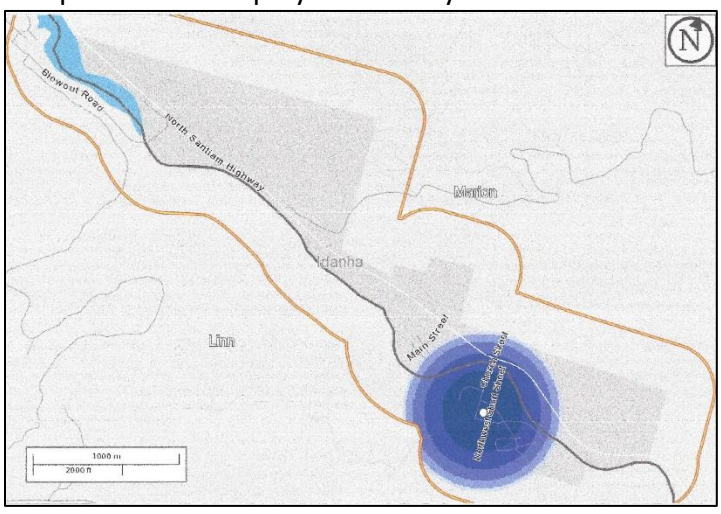
Employment numbers for Detroit clearly show its orientation to tourism. The largest single category of employment in 2014 was Accommodation & Food Service. This sector declined from 25 workers in 2002 to 14 workers in 2014. The Arts, Entertainment & Recreation sector was in second place in 2014 with 11 workers but showed no employment in this sector in 2002. That may have been due to changes in industry classifications following the shift from the former Standard Industrial Classification (SIC) codes to the North American Industrial Classification System (NAICS) codes.

The only other sectors showing employment in 2014 were Construction, Retail Trade, Administration & Support Services, Other Services, and Public Administration.

Overall, total primary jobs fell from 50 workers in 2002 to 47 workers in 2014. While this was a fairly small numerical decline of only 3 workers, it still represented a loss of 6.0% on the small employee base.

IDANHA

Map 7: Idanha Employment Analysis Area



Idanha is located at the eastern end of the North Santiam Corridor. It is 31 miles east of the Lyons/Mehama area at the western end of the Corridor and only 4.3 miles east of Detroit. As seen on the map, all employment in Idanha is concentrated around a commercial center although the city limits extend both east and west for some distance. Most of the population of Idanha lives in a cluster of homes on the south side of the North Santiam River in an area shown on some maps as “New Idanha”. That part of town also contains the River Mountain RV Park.

Table 9: Population Trends for Idanha, 2000 to 2015

	2000	2015	Total Δ # 2000 - 2015	Annual Δ % 2000 - 2015
Idanha	232	140	-92	-3.31%
North Santiam Study Area	3,829	4,142	313	0.53%
Oregon	3,431,100	4,001,600	570,500	1.03%

Source: 2000 U.S. Census; 2015 from PSU Certified Population Estimates 7/1/2015;

As seen in Table 9, Idanha had a significant decline in population from 2000 to 2015 due to the closure of its major industry, Green Veneer and Lumber Mill. This facility was located on 17 acres of land between OR 22 and the North Santiam River. Much of the mill plant has been demolished, the equipment removed, and the land cleared for new development. However, a few of the buildings remain and are used for storage of boats, campers, and other recreational vehicles. While this makes use of some of the property, it produces virtually no employment.

Table 10: Employment Profile, Idanha, 2002 Compared to 2014

			IDANHA			
	2002		2014		Change	
Total Primary Jobs	0	100.0%	5	100.0%	5	500.0%
Jobs by NAICS Sector						
Ag., Forest, Fishing, Hunting	0	0.0%	0	0.0%	0	0.0%
Mining, Quarry, Oil, Gas	0	0.0%	0	0.0%	0	0.0%
Utilities	0	0.0%	0	0.0%	0	0.0%
Construction	0	0.0%	0	0.0%	0	0.0%
Manufacturing	0	0.0%	0	0.0%	0	0.0%
Wholesale Trade	0	0.0%	2	40.0%	2	*200.0
Retail Trade	0	0.0%	0	10.6%	0	0.0%
Transportation, Warehouse	0	0.0%	3	60.0%	3	*300.0
Information	0	0.0%	0	0.0%	0	0.0%
Finance & Insurance	0	0.0%	0	0.0%	0	0.0%
Real Estate, Renting & Lease	0	0.0%	0	0.0%	0	0.0%
Professional, Scientific, Tech.	0	0.0%	0	0.0%	0	0.0%
Mgt. of Companies, Enterprise.	0	0.0%	0	0.0%	0	0.0%
Admin. & Support, Waste Mgt.	0	0.0%	0	0.0%	0	0.0%
Educational Services	0	0.0%	0	0.0%	0	0.0%
Health Care & Social Assistance	0	0.0%	0	0.0%	0	0.0%
Arts, Entertainment, Recreation	0	0.0%	0	0.0%	0	0.0%

			IDANHA			
	2002		2014		Change	
Accommodation, Food Service	0	0.0%	0	0.0%	0	0.0%
Other Services	0	0.0%	0	0.0%	0	0.0%
Public Administration	0	0.0%	0	0.0%	0	0.0%

Source: On the Map profile for area selected.

Knowing that Idanha has a Post Office, a small general store, and an equipment repair shop makes it improbable that there was no employment in the community in 2002 and only five workers in 2014, all in the two sectors of Wholesale Trade and Transportation & Warehousing. It is possible that the other workers are part-time and/or seasonal so are not counted as primary workers. In any case, there does not appear to be any stimulus for new business development in Idanha.

The Mill property is currently listed with a realtor who works out of Salem. In a discussion about potential buyers, she reported that several people have expressed interest in the property, primarily to use for additional dry storage of boats and other recreational vehicles and equipment. There appears to be demand for that kind of storage so that owners will not have to trailer their boats to Detroit Lake during the prime recreational season. She said that the main reason it has not been sold is that offers have provided for small down payments and extended terms which were not acceptable to the owners.

NORTH SANTIAM CANYON CORRIDOR

The 2000 - 2015 population numbers for the five communities in the North Santiam Canyon Corridor are shown below in Table 11 to provide comparison of their growth rates. The combined *employment* numbers are shown in Tables 12, 13 and 14.

Table 11: Combined Population Trends for North Santiam Corridor, 2000 to 2015

	2000	2015	Total Δ # 2000 - 2015	Annual Δ % 2000 - 2015
Lyons/Mehama	1,301	1,452	151	0.73%
Mill City	1,563	1,855	292	1.15%
Gates	471	485	14	0.20%
Detroit	262	210	-52	-1.46%
Idanha	232	140	-92	-3.31%
Total	3,829	4,142	313	0.53%

Source: 2000 U.S. Census; 2015 from PSU Certified Population Estimates 7/1/2015; Projections from Population Forecasts for Marion County, 2008, extrapolated to 2035 and including portions of communities in Lynn County.

Table 12: Combined Employment Numbers by Sector, **2002**

			2002			
	Lyons	**Mill City**	**Gates**	**Detroit**	**Idanha**	**Total**
Total Primary Jobs	559	216	23	50	0	848
Jobs by NAICS Sector						
Ag., Forest, Fishing, Hunting	34	25	1	0	0	60
Mining, Quarry, Oil, Gas	0	0	0	0	0	0
Utilities	0	0	0	0	0	0
Construction	16	4	2	6	0	28
Manufacturing	396	5	0	0	0	401
Wholesale Trade	23	3	0	0	0	26
Retail Trade	20	40	0	9	0	69
Transportation, Warehouse	7	0	0	0	0	7
Information	0	5	0	0	0	5
Finance & Insurance	0	2	0	0	0	2
Real Estate, Renting & Lease	0	3	0	0	0	3
Professional, Scientific, Tech.	3	0	0	0	0	3
Mgt. of Companies, Enterprise.	0	0	0	0	0	0
Admin. & Support, Waste Mgt.	6	1	2	0	0	9
Educational Services	13	67	8	0	0	88
Health Care & Social Assistance	1	7	0	0	0	8
Arts, Entertainment, Recreation	0	2	0	0	0	2
Accommodation, Food Service	0	38	8	25	0	71
Other Services	12	7	1	4	0	24
Public Administration	28	7	1	6	0	42

Source: Combined employment profiles from On the Map, U.S. Census Bureau

Table 13: Combined Employment Numbers by Sector, **2014**

			2014			
	Lyons	**Mill City**	**Gates**	**Detroit**	**Idanha**	**Total**
Total Primary Jobs	559	408	14	47	5	1033
Jobs by NAICS Sector						
Ag., Forest, Fishing, Hunting	33	4	0	0	0	37
Mining, Quarry, Oil, Gas	0	0	0	0	0	0
Utilities	2	0	0	0	0	2
Construction	34	8	1	7	0	50
Manufacturing	328	183	0	0	0	511
Wholesale Trade	47	0	0	0	2	49
Retail Trade	21	41	0	5	0	67
Transportation, Warehouse	7	0	0	0	3	10
Information	0	0	0	0	0	0
Finance & Insurance	1	5	0	0	0	6
Real Estate, Renting & Lease	3	0	0	0	0	3
Professional, Scientific, Tech.	10	8	0	0	0	18
Mgt. of Companies, Enterprise.	0	0	0	0	0	0
Admin. & Support, Waste Mgt.	1	2	1	5	0	9
Educational Services	17	80	0	0	0	97
Health Care & Social Assistance	3	8	1	0	0	12
Arts, Entertainment, Recreation	0	0	0	11	0	11
Accommodation, Food Service	18	49	3	14	0	84
Other Services	9	8	4	2	0	23
Public Administration	25	12	4	3	0	44

Source: Combined employment profiles from On the Map, U.S. Census Bureau

The numbers in tables 12 and 13 show that total combined primary employment in the North Santiam Corridor increased from 848 workers in 2002 to 1,033 workers in 2014 for a gain of 185 workers and a percentage gain of 21.8%. That represents an average annual employment increase of 1.7% even with the effects of the recession and the slow recovery that has followed.

Some of that gain was caused by the data showing only 5 persons employed in Manufacturing in Mill City in 2002 and increasing to 183 workers in that sector in 2014. However, that increased the base on which employment projections can be made from 2015 to 2035.

The combined employment numbers comparing 2002 with 2014 are shown in Table 14.

Table 14: 2002 and 2014 Combined Employment Numbers

	NORTH SANTIAM CORRIDOR					
	2002	%	2014	%	Change	% Change
Total Primary Jobs	848	100.0%	1,033	100.0%	185	21.8%
Jobs by NAICS Sector						
Ag., Forest, Fishing, Hunting	60	7.1%	37	0.0%	-23	-38.3%
Mining, Quarry, Oil, Gas	0	0.0%	0	0.0%	0	0.0%
Utilities	0	0.0%	2	0.0%	2	200.0%
Construction	28	3.3%	50	7.1%	22	78.6%
Manufacturing	401	47.3%	511	49.5%	110	27.4%
Wholesale Trade	26	3.1%	49	0.0%	23	88.5%
Retail Trade	69	8.1%	67	0.0%	-2	-2.9%
Transportation, Warehouse	7	0.8%	10	0.0%	3	42.9%
Information	5	0.6%	0	0.0%	-5	-100.0%
Finance & Insurance	2	0.2%	6	0.0%	9	450.0%
Real Estate, Renting & Lease	3	0.4%	3	0.0%	0	0.0%
Professional, Scientific, Tech.	3	0.4%	18	0.0%	15	500.0%
Mgt. of Companies, Enterprise.	0	0.0%	0	0.0%	0	0.0%
Admin. & Support, Waste Mgt.	9	1.1%	9	7.1%	-1	-11.1%
Educational Services	88	10.4%	97	0.0%	9	10.2%
Health Care & Social Assistance	8	0.9%	12	7.1%	3	37.5%
Arts, Entertainment, Recreation	2	0.2%	11	0.0%	9	450.0%
Accommodation, Food Service	71	8.4%	84	21.4%	13	18.3%
Other Services	17	2.0%	23	28.6%	-2	-11.8%
Public Administration	35	4.1%	44	28.6%	-3	-8.6%

Source: On the Map data aggregated by Elesco Limited.

SUMMARY OF PART 1

The analysis in Part 1 shows that the communities of Lyons/Mehama and Mill City have strong economic bases anchored by the Manufacturing sector concentrated primarily in Lumber & Wood Products. They are employment centers for residents of other communities in the Corridor, such as Gates. While their dependence on the volatile wood products industry puts them at risk, those companies appear to have adjusted to changes in the industry and have stabilized their employment.

Put together, these two communities provide a complete range of commercial and public services to keep them self-sustaining. That will enable them to continue to draw new residents as the population in the Willamette Valley grows.

Gates is a rural residential community and there are no signs that will change in the near future. There may be minor additions to its commercial base to service an increasing tourism volume from the Willamette Valley. Detroit should also see increased demand for tourist commercial services in its central business district and at lakefront businesses.

Opportunities for Idanha are limited. The former mill properties will likely be purchased at some point and used primarily for transportation and warehousing facilities that would require only limited improvements to existing infrastructure.

Overall, total primary employment in the North Santiam Corridor averaged 24.94% of the total population compared to a ratio of 42.6% for the whole state of Oregon. Several reasons have been cited for this disparity including an aging labor force, greater seasonal and part time employment, and volatility in the lumber and wood products sector of the economy.

Observations of traffic flows also indicate there are significant numbers of workers who commute to jobs in Salem, Albany and other cities along the I-5 corridor, especially from the Lyons/Mehama and Mill City communities. There is also a large population of retirees consistent with the aging of the labor force.

With this overview of current patterns and trends of population and employment in the North Santiam Corridor, the next section of this report provides projections of those patterns and trends for the 20-year period of 2015 to 2035.

PART 2: POPULATION AND EMPLOYMENT PROJECTIONS

As noted in the introductory section of this report, Portland State University's Center for Population Research and Census is currently producing a 50-year projection of population in Oregon's counties and cities but the data for Marion County and the adjacent parts of Linn County had not yet been released at the time this report was written. The timeframe for release of data for Region 3, which contains those two counties, is July 2016 to July 2017. County data will be released during the first part of that time period followed by projections for cities during the latter part.

As a consequence of this absence of certified projections, there were extensive discussions among local planning officials and the consultants on alternative ways to forecast population and employment growth in the communities of the North Santiam Corridor using methodologies that conform to statutory requirements and were based on defensible planning assumptions. In addition, the discussions considered methodologies to estimate accelerated growth rates of population and employment that would be caused by the provision of sewer infrastructure to those communities.

The *baseline* growth rate used in this report is the 20-year growth rate produced by the Population Research Center (PRC) of Portland State University certified by Marion County, cited above. That report covered the period from 2010 to 2030 and the projections were extrapolated an additional five years to provide estimates for 2015 to 2035. The individual baseline average annual growth rate (baseline aagr) for each community is calculated in a spreadsheet and aggregated for a total canyon-wide population growth rate of 0.89%.

Augmented average annual growth rates assume an increase in the rate of population growth based on the availability of sewer. This percentage was calculated by Brandon Reich, Senior Planner for Marion County Public Works/Planning based on a survey of similarly sized and located communities. The increase in growth rate after sewer is 190% of the baseline aagr.

This augmented rate is applied to the baseline rate for each community individually in the model. Because the sewer system does not currently exist (except in Mill City which was excluded from the aagr increase) and will take time to design, permit and construct, the model assumes the augmented rate does not apply until year 11 (2025) of the 20-year planning period. In the augmented rate scenario, the model shows baseline growth for years 1 to 10 and the augmented rate for years 11 to 20. This is expected to reflect a conservative and realistic growth scenario.

Employed population is calculated as a ratio of total population. It was originally proposed to use the statewide ratio of employment to population of 42.6% but after the discussions it was agreed to use the rate that is currently found in the Canyon area, again calculated as a unique ratio for each community. This is reflected in the model. The average employed population percentage was shown above as 24.94% and is rounded to 25% for the model across the Canyon. As a benchmark, this rate will be closer to the current conditions in the Canyon.

Following are the numbers copied from the spreadsheets that are the result of these calculations.

Table 15: 20-Year Population Growth Projections, 2015 to 2035

City	Baseline aagr	Augmented Growth Rate 190% increase with sewer		Certified Population 2015	Population with Baseline aagr 2035	First 10-Year Population at Base aagr 2015-2025	Second 10-Year Population at Augmented aagr 2025-2035
Lyons/Mehama	1.70%	3.23%		1452	2034	1719	2362
Mill City*	0.50%	0.50%	*has sewer	1855	2050	1950	2050
Gates	0.07%	0.14%		485	492	488	495
Detroit	0.40%	0.76%		210	228	219	236
Idanha	0.18%	0.33%		140	145	142	147
Total Corridor	0.89%	1.69%		4142	4949	4,526	5290

Calculating total annual average increases at 0.89% over the 20-year period of 2015 to 2035 produces an estimate that the population of the Corridor will increase from 4,142 in 2015 to 4,949 in 2035. However, adding the augmented growth rate due to the development of sewers in 2025 raises the total population in 2035 to 5,290. That is an increase of 1,148 persons over the 20-year period versus an increase of only 807 persons at the base rate without sewers.

Similar estimates can be calculated for total employment in the Corridor over the 20-year period using the employment-to-population ratio of 25%.

Table 16: 20-Year Employment Growth Projections, 2015 to 2035

City	Employment	Employed Percentage	Baseline aagr	Augmented aagr
	2015	**2015**	**2035**	**2035**
Lyons/Mehama	559	0.38	783	1056
Mill City*	408	0.22	451	451
Gates	14	0.03	14	14
Detroit	47	0.22	51	55
Idanha	5	0.04	5	5
Total	1033	0.25	1304	1581
			Change	Change
			271	548

Under this scenario, applying the Augmented Average Growth Rate to the second half of the 20-year projection period raises total employment from 271 additional workers to 548 additional workers in the year 2035.

PART 3: DEMAND FOR INDUSTRIAL AND COMMERCIAL SITES

Assumptions and Land Demand Forecasts

Two categories of land zoning are included in the forecast: Industrial and Commercial. The Industrial land category includes the following sectors, which represented 54.6% of all primary jobs in the Corridor in 2014:

Utilities
Construction
Manufacturing
Wholesale Trade
Transportation and Warehousing

These five sectors combined employed a total of 462 workers in the North Santiam Corridor in 2002, increasing to 622 workers in 2014. The additional 160 workers represented a total increase of 34.6% over the 12-year period or an annual average growth rate of 2.5%.

That growth rate is unlikely to be sustained in the future. The largest industries in the Corridor are engaged in the Lumber and Wood Products sector of Manufacturing. There are many pressures on that industry, especially the diminished supply of timber from Federal lands. However, there are opportunities to compete successfully in the market with specialty products such as engineered structural members and cross laminated timber (CLT) beams. For example, CLT beams are increasingly being used for high-rise building structures in place of concrete and steel. The companies located in the Corridor have proven they can adapt to changes in the industry and it is reasonable to assume that they still have growth potential.

As population in the Willamette Valley grows and expands into the suburban and exurban areas east of Salem, it can be assumed that new industries will be developed in places such as Lyons and Mill City. Along the U.S. Hwy 99W corridor northwest of Salem, the viticulture and winery industry has stimulated significant growth of both population and employment. There is no certainty that will happen in the North Santiam Corridor but it cannot be ruled out.

There is a wide range of models showing the amount of building space per employee in industrial sectors. For this report, a model is used that was developed by the consulting firm

ECONorthwest as part of the Economic Opportunities Analysis (EOA) for the Buildable Lands Inventory for the City of Newport in 2012.[2]

The study allocates future employment to land use types with similar building and site requirements, based on the North American Industry Classification System (NAICS), which assigns a classification code to every business with employment. The land use types are:

Industrial businesses in the following sectors: Natural Resources and Mining, Construction, Manufacturing, Wholesale Trade, and Transportation, Warehousing, and Utilities.

Commercial businesses in the following sectors: Retail trade, Information, Finance and Insurance, Real Estate, Professional and Scientific Services, Management of Companies, Administrative and Support Services, Private Educational Services, Health Care and Social Assistance, Accommodations and Food Services, and Other Services.

Government includes employment local, state, and federal agencies, including public educational services.

The ECONorthwest analysis then assumes the following employment densities per acre of future employment: Industrial will have an average of 10 employees per acre (EPA) and Commercial and Government will have an average of 20 EPA.

The report then recognizes that some types of employment will have higher employment densities (e.g., a multistory office building) and some will have lower employment densities (e.g., a convenience store with a large parking lot). In Prineville, Oregon, the Facebook data center was initially established on 122 acres to accommodate planned permanent employment of only 35 workers.

[2] Commercial and Industrial Buildable Lands Inventory and Economic Opportunities Analysis. Prepared for City of Newport by ECONorthwest, Eugene, Oregon. July 2012

Finally, the ECONorthwest study converts net acres to gross acres by adding a factor for public right of way. For the Newport study, the conversion factor from net to gross was 15% for industrial and 20% for commercial and government land uses.

Based on the projections of industrial and commercial employment in the North Santiam Corridor developed in this report, those utilization factors result in the following tables of 20-year demand:

Table 17: Industrial and Commercial Land Requirements, 2015 – 2035, on **Baseline** AAGR

Land Use Type	Employment Growth	EPA (Net Acres)	Land Demand (Net Acres)	Land Demand (Gross Acres)
Industrial	148	10	14.8	17.0
Commercial	123	20	6.2	7.4
Total	271		21.0	24.4

Calculations by Elesco Limited based on ECONorthwest model

Table 18: Industrial and Commercial Land Requirements, 2015 – 2035, on **Augmented** AAGR

Land Use Type	Employment Growth	EPA (Net Acres)	Land Demand (Net Acres)	Land Demand (Gross Acres)
Industrial	299	10	29.9	34.4
Commercial	249	20	12.5	15.0
Total	548		41.4	49.4

Calculations by Elesco Limited based on ECONorthwest model

Based on visual observations of employment concentrations, it appears that about 70% of the industries in the North Santiam Corridor would fit the requirements for “large industry lots” while about 30% are located on “small Industry lots”. However, most commercial facilities are smaller buildings located in the downtown centers indicating that about 80% of the commercial uses would require “small commercial lots” and 20% would require “large commercial lots”.

While the ECONorthwest model produces the numbers shown in Table 18, it needs to be noted that the projections contain an element of variability. The population forecasts by Marion

County contain a comparison of population growth for both high growth scenarios and low growth scenarios. While these are not developed at the level of the smaller communities, for the whole county the low population growth projections are based on a growth rate of 0.85% while the high population growth projections are based on a growth rate of 1.53%. Holding the percentage of population employed in the labor force as a constant would result in employment matching the growth rate of the population.

The employment growth rates shown in tables 15 and 16 reflect a base average annual growth rate of 0.89% which is close to the lower end of the Marion County population growth rates. If those rates should reach the high rate projections, then employment growth in the whole county would be 72% higher. Those higher growth rates would not necessarily be the same in the smaller communities or the unincorporated areas of the county.

SUMMARY OF PART 3

For the North Santiam Corridor, the analysis indicates that there will be demand for both industrial and commercial land over the next 20 years. Demand for industrial land is estimated at 17.0 acres under the baseline aagr projections and demand for commercial land is estimated at 7.4 acres, for a combined total of 24.4 acres. Under the augmented aagr assumptions, new demand would rise by 34.4 acres for industrial land and 15.0 acres for commercial land for a combined increase of 49.4 acres.

No effort has been made to allocate the locations of that demand but it must be assumed that most of the industrial demand will occur at the western end of the Corridor around Lyons/Mehama and Mill City. There will be very little demand of either type at Gates or Idanha, and most of the demand at Detroit will be for tourist commercial uses.

It also needs to be noted that the analysis does not include a review of lands within the UGB areas of the cities that can accommodate this demand. It is possible that all this demand will be

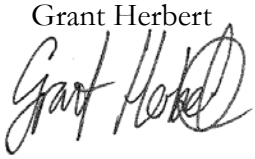
met inside existing UGBs. No conclusions have been drawn in this analysis that apply to zone changes, infill, redevelopment or other land use issues.

APPENDIX B

TECHNICAL MEMORANDUM

MEMORANDUM

To:	Danielle Gonzalez, Marion County	Date:	January 9, 2017
From:	Grant Herbert	Project:	0612.03.01



RE: North Santiam Canyon Regional Land Inventory—Technical Memorandum

This technical memorandum describes the data sources and methodology used in the North Santiam Canyon Regional Land Inventory. It is intended to accompany both the report and the geodatabase deliverables.

Geodatabase Description

The data deliverable is made up of two geodatabases: SourceData and Inventory. The SourceData geodatabase contains the primary data, including scanned images. The Inventory geodatabase contains all derived data, including the inventory dataset with captured imagery.

Data Sources

Source data were obtained from the following entities in May 2016:

- Linn County
- Marion County
- Mid-Willamette Valley Council of Governments
- City of Detroit
- City of Gates
- City of Idanha
- Oregon Department of Environmental Quality (DEQ).

The GIS data obtained included tax parcel and assessor information, zoning and comprehensive plan data, rail lines, roads, city limits and urban growth boundaries (UGBs), Federal Emergency Management Agency floodplains, river and stream data, and aerial imagery. Records from the DEQ Leaking Underground Storage Tank (LUST) Cleanup Site Database (as of April 5, 2016) and Environmental Cleanup Site Information (ECSI) (as of April 2016) were downloaded. Ten-meter-resolution elevation data (2012) was obtained from the U.S. Geological Survey (USGS).

In addition to GIS data, sewer and water information was obtained in paper format from each of the cities involved. Supplemental GIS health data were obtained from the Environmental Public Health Tracking Network database, Oregon Health Authority Public Health Division, for inclusion in the online viewer (for comparison purposes).

City Discussions

As part of the discovery process, interviews were held with city officials regarding their opinions on the types of industries they wanted to have in their communities, the industries they thought were growing, and any barriers and opportunities that they recognized. This data was summarized and included in the final report.

Data Processing

All GIS data were consolidated into Esri filegeodatabase formats. Coordinate systems were standardized to NAD 1983 HARN State Plane International Feet (WKID 2913). DEQ data were processed to extract the site addresses and were geocoded using Esri address geocoders (May 2016).

A general area of interest was created to delineate the study area.

Tax parcels were selected by intersecting with a quarter-mile buffer from a combined Urban Growth Boundary and City Limit dataset, to ensure that all appropriate parcels would be included. This dataset was then manually checked. The two county datasets were merged and harmonized for selected attributes relevant to the project, and the combined dataset was then manually checked. The combined dataset formed the basis for the field inventory dataset.

Zoning datasets were updated to incorporate splitzones where needed, and comprehensive plan/zoning information was added to the parcel datasets, using a majority rules approach. In addition, the UGB and/or city that contained the parcel were added as attributes.

Paper utilities maps were scanned and georeferenced, and the general utility lines and basic attributes were digitized into GIS format.

Imagery obtained from Linn County was clipped to the study area.

All sites falling within areas zoned commercial or industrial were identified for the field inventory. Additional fields were added to a combined parcels dataset to allow for the capture of relevant information, such as the presence of a DEQ LUST or ECSI record in that parcel (by address location), the utilization ratio, the likely presence of water or sewers at the property (based on a distance from the main lines digitized), as well as fields to be populated during the fieldwork, such as current land use, site configuration, likely brownfield status, and business type. The data were then set up in an online collector tool for field inventory.

Inventory

A field data inventory of the identified commercial and industrial parcels in the North Santiam study area was conducted on July 14, 2016, by two MFA staff members using an online GIS collector application and a mixture of iPad tablets and Android phones. This allowed staff to identify the parcel in question, collect a series of attributes, add a photograph, etc. Fields populated during this assessment included an assessment of brownfield status, the business type, a qualitative assessment of site configuration, and the general development status.

Field work captured fields and brief description:

Status: Subjective visual assessment of property status. Undeveloped properties are greenfields, Vacant properties may have an empty building or remains of a building/structure on site, developed has a building in use at time of assessment.

Land Use: Subjective visual assessment of current land use (residential, commercial, industrial).

Site Configuration: Subjective visual assessment of general site configuration as assessed during field work.

Brownfield: Subjective visual assessment of property regarding suspect brownfield status.

Road Type: Largest road type abutting property (eg Highway larger than local)

On Highway: Property has highway access

Tourism Primary: Subjective visual assessment of whether Tourism is a primary driver of the business

Business Type: Subjective visual assessment of general business type

Storefront Appeal: Subjective visual assessment of the general appeal of the storefront

Field Survey Results

A brief summary of the parcel inventory conducted:

Type	Count	Acres
Total Parcels Inventoried	653	1073.16
Parcels assessed Developed	459	690.12
Parcels assessed Undeveloped	147	234.82
Parcels assessed Vacant	43	146.93
Parcels assessed Suspect Brownfield	77	512.02
Parcels known LUST/ECSI record	14	99.47

Typologies

Four typologies were developed to categorize the properties, based on property size and zoning. Parcel area and minimums were decided following discussion with the Technical Advisory Group.

1. Industrial—large (> 217,800 square feet)
2. Industrial—small (< 217,800 square feet), minimum 1 acre
3. Commercial—large (> 25,000 square feet)
4. Commercial—small (< 25,000 square feet), minimum 0.25 acre

The Large Industrial typology consists of parcels zoned industrial and larger than 5 acres (217,800 square feet). The Small Industrial typology comprises parcels zoned industrial and smaller than 5 acres. Small Industrial parcels smaller than 1 acres were excluded from further consideration.

The Large Commercial typology consists of parcels zoned commercial and larger than 1 acre (25,000 square feet). The Small Commercial typology consists of parcels zoned commercial and smaller than 1 acre. Small Commercial parcels smaller than 0.25 acre were excluded from further consideration.

Below are examples of the possible types of businesses for each typology. Note that these are indicative only.

Typology	Use
Small Commercial	Highway commercial Small Office—Professional Restaurant Small Service—Laundry, Dentist
Large Commercial	Grocery Store Retail Cluster Recreational Cluster
Small Industrial	Specialized Manufacturing Custom Boat Building Equipment Service and Repair
Large Industrial	Secondary Wood Products Metal Fabrication and Machinery Construction Materials Manufacturing

Following the typology assessment, the effective number of parcels to be evaluated and analyzed was reduced to 281 properties (mainly because the parcel-size criteria excluded a large number of small parcels from consideration, but also from exclusion of parcels not within an identified city limit or UGB). A summary of these is provided below:

Type	Count	Acres
Total parcels inventoried	281	902.82
Parcels assessed Developed	208	598.03
Parcels assessed Undeveloped	51	162.07
Parcels assessed Vacant	22	142.71
Parcels assessed Suspect Brownfield	55	493.42
Parcels known LUST/ECSI record	9	91.72
Highway access	116	303.44
Parcels with utility access	143	123.95

Parcel summary by typology:

ALL PROPERTIES	Commercial (Large)		Commercial (Small)		Industrial (Large)		Industrial (Small)	
	(Acres)	(Sq Feet)	(Acres)	(Sq Feet)	(Acres)	(Sq Feet)	(Acres)	(Sq Feet)
Criteria	> 0.57sc / 25,000sqft		< 0.57ac / 25,000sqft (min .25 ac)		> 5ac / 217,800sqft		< 5ac / 217,800sqft (min 1 ac)	
No. of Properties	67		152		28		34	
Average Parcel Size	2.94	128066	0.37	16117.2	20.53	894286.8	2.23	97138.8
Min Parcel Size	0.57	24829.2	0.25	10890	5.02	218671.2	1	43560
Max Parcel Size	45.1	1964556	0.57	24829.2	108.6	4730616	4.65	202554
Developed Land								
No. of Properties	45		122		20		21	
Total Acreage	62.81	2736004	44.61	1943212	447.87	19509217.2	42.74	1861754
Average Parcel Size	1.4	60984	0.37	16117.2	22.4	975744	2.04	88862.4
Undeveloped Land								
No. of Properties	14		21		5		11	
Total Acreage	51.97	2263813	7.83	341075	77.36	3369801.6	24.91	1085080
Average Parcel Size	3.71	161608	0.37	16117.2	15.47	673873.2	2.26	98445.6
Vacant Land								
No. of Properties	8		9		3		2	
Total Acreage	82.71	3602848	3.33	145055	49.51	2156655.6	7.16	311890
Average Parcel Size	10.34	450410	0.37	16117.2	16.5	718740	3.58	155945
No. Suspect Brownfields	10		15		18		12	
No. LUST/ECSI	1		4		4		0	
No. on Highway	40		60		8		8	
No. with Utility Access	40		98		3		2	

Redevelopment Analysis

Additional calculated fields

A number of additional fields were calculated into the inventory dataset to assist with assessing parcel development potential.

Distance to Interstate 5: Parcel distance from Interstate 5 was calculated as the straight-line distance from a geographically registered point location at the intersection of Highway 22 and Interstate 5 to each parcel centroid, using the Esri ArcGIS Spatial Analyst "Near" geoprocessing tool. This gives an indicated distance to the entry to Interstate 5.

Slope: For each property, slope was calculated from a 10-meter spatial resolution USGS digital elevation model. The percent-slope was calculated using the Esri ArcGIS Spatial Analyst "Slope" geoprocessing tool to derive an average percent-slope for each property.

Water and Sewer Utilities: Utility main locations were digitized from the georeferenced maps provided by individual municipalities for areas where there is coverage. Where attributes were available on the maps, these were added to the dataset. A spatial selection of all parcels that fell with 65 feet from a utility line was used to estimate which parcels had, or could have, utility access. Note: sewer data were available only for Mill City.

Utilization Ratio

Using assessor data provided by Linn and Marion counties, a utilization ratio was calculated for each property. The utilization ratio is the relationship between assessed improved value divided by the assessed land value. In general terms, a property with a ratio greater than 50 percent is considered "utilized." Properties with lower utilization may be more suitable targets for development, either in potential extra buildings/infrastructure, or in the potential for expansion or replacement.

Residential Property Septic System Requirements

Residential properties were not a focus of this study; however, individual parcels that did not meet the current minimum septic system size (assuming a representative house) were identified for future reference.

Guidance received from Keller & Associates as to the minimum viable lot size was used to identify lots that would not meet septic system installment requirements without being combined with neighboring lots. For the analysis, it was assumed that all lots met the general assumptions discussed below, and only the size of the lot was considered. An aerial analysis yielded an average house size of 3,600 square feet, and this was incorporated into the calculation. The minimum lot size (including setback) provided below was doubled to represent Marion County requirements that a replacement area be provided.

Criteria provided by Keller & Associates:

The minimum area required for a septic absorption trench (area free of property lines, foundation lines for any building, groundwater supply wells, and all utilities) is **5,600 square feet** (minimum of 46'x122') (including setback from property line) or **2,652 square feet** (26'x102') without a 10-foot property line buffer (not including setback from property line). This represents a looped equal distribution system based on the following assumptions:

- All groundwater depth requirements met.
- Trench width of 24" (minimum without increasing length of trench) using 2.25" to .75" gravel as drainage media.
- Ground slope less than 30 percent (separate guidelines for >30%).
  - Sewage production of 450 gallons per day.
  - Four-bedroom single-family dwelling.
- Trench length of 450' (linear).
  - Type C soil (conservative—soil in the communities is a mix from A through D).
  - Effective soil depth of 24" to 36".
  - Depth to temporary groundwater table 24" to 48".
- Property lines are free of:
  - Groundwater supply wells
  - Surface waters
  - Ground water interceptors
  - Irrigation canals
  - Downgradient escarpments or manmade cuts >30"
- Property topography allows the abovementioned dimensions.
- Absorption trenches must be on elevation contours with tolerance of 1".

Also, Marion County requires twice the needed area so that there is enough area to completely replace the drain field if needed.

Guidelines used:

- OAR 340-071-0220(2)
- Supporting Tables
- Marion County Onsite Sewage Disposal

Matrices and Property Ranking

A calculation matrix was developed to rank properties, based on variables affecting the general development desirability of the property for its currently zoned use. Each matrix and the variables involved are described below.

The variables considered included the utilization ratio, developed status, brownfield and LUST/ECSI status, utility access, visibility from the highway and highway access, distance to Interstate 5, and the general site configuration as assessed in the field (a qualitative value). Each of these was assigned a value, positive or negative, to develop a rank for the parcel.

A positive weighting reflects a positive impact of that variable; a negative weighting reflects the opposite. A neutral variable (or one excluded from consideration) would have a weighting of 0. Water and sewer access was assigned as a positive if the property had access, and a negative if it did not. In the final scenario, water and sewer access was assumed for all properties.

Matrix 1 was investigated and compared with Matrix 2; after discussion with the Technical Advisory Group, it was decided to go ahead with Matrix 2, as it was more representative of identifying developable properties. Matrix 2 was used for the Baseline Growth impact calculations, and Matrix 3 was used for the Augmented Growth calculations as well as to assess the improvement in ranking if sewer and water access was assumed equal throughout the study area. Matrix 3 removes the positive/negative effect of sewer and water, as it assumes a post-sewer-installation scenario.

MATRIX 1		
Variable	*Weighting*	*Notes*
Underutilized	0	
Undeveloped	0	
Vacant	0	
Suspect Brownfield	-1	
LUST/ECSI	-2	
Water Utility	-1 / +1	negative if no access
Sewer Utility	-1 / +1	negative if no access
Visibility (Commercial)	+1	
Highway Access (Industrial)	0	
Distance to I-5 (Industrial) (20 mi)	+1	
Good Site Configuration	+1	

MATRIX 2		
Variable	*Weighting*	*Notes*
Underutilized	0	
Undeveloped	+1	
Vacant	+1	
Suspect Brownfield	-1	
LUST/ECSI	-2	
Water Utility	-1 / +1	negative if no access
Sewer Utility	-1 / +1	negative if no access
Visibility (Commercial)	+1	
Highway Access (Industrial)	0	
Distance to I-5 (Industrial) (20 mi)	+1	
Good Site Configuration	+1	

MATRIX 3		
Variable	*Weighting*	*Notes*
Underutilized	0	
Undeveloped	+1	
Vacant	+1	
Suspect Brownfield	-1	
LUST/ECSI	-2	
Water Utility	+1 / +1	Assumed all properties
Sewer Utility	+1 / +1	Assumed all properties
Visibility (Commercial)	+1	
Highway Access (Industrial)	0	
Distance to I-5 (Industrial) (20 mi)	+1	
Good Site Configuration	+1	

Ranking

The output of the matrix calculations was a parcel rank value. Higher-ranked properties are considered more desirable from a development standpoint. The ranking is subjective and does not incorporate specific business needs, the cost of the property, or the land preparation that may be required.

Analysis

Using land demand estimates generated by Elesco Limited (Elesco), the highest-ranked properties that would meet the demand were identified to determine if capacity was available, and indicate likely locations for development to occur.

The Baseline Growth scenario used Matrix 2 to identify the highest-ranked vacant and undeveloped industrial and commercial parcels that meet the projected Baseline Growth rate land demand, and indicate those more desirable for development. Typologies were assigned to the estimated land demand, using the following ratios: Large Industrial 65 percent, Small Industrial 35 percent; Large Commercial 25 percent, Small Commercial 75 percent, in line with Elesco estimates.

The Augmented Growth scenario used Matrix 3 to identify the highest-ranked vacant and undeveloped industrial and commercial parcels that meet the Augmented Growth rate land demand, and indicate those more desirable for development. Typologies were assigned to the estimated land demand using the following ratios: Large Industrial 65 percent, Small Industrial 35 percent; Large Commercial 25 percent, Small Commercial 75 percent, in line with Elesco estimates.

A comparison was made between Matrix 2 and Matrix 3 rankings to estimate the impact of a sewer system in the canyon on the desirability of industrial and commercial zoned parcels. A positive difference indicates a parcel that increased in desirability following the development of a sewer system in the canyon. In this analysis, all parcels (undeveloped, vacant, and developed), are included.

APPENDIX C

PROPERTY CUT SHEETS

Property 1
SR22 & Northwest 7th Avenue Mill City, Oregon

BASELINE SCORE
5

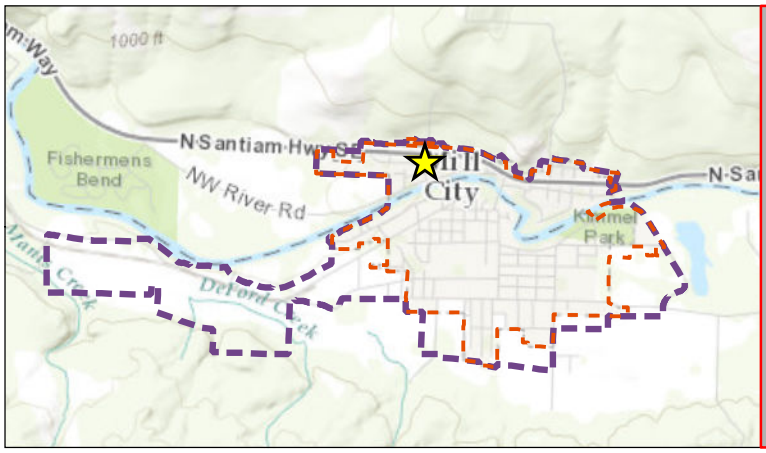
Baseline score generated from ranked variables. A higher score indicates the property is considered more desirable for development. Maximum value = 5.

Legend

- Identified Developable Parcel
- City Limits
- Urban Growth Boundary
- Tax Lot

0 50 100
Feet

Source: Aerial photograph obtained from Linn County. Site location basemap obtained from Esri ArcGIS Online. Parcel boundaries and streets obtained from Marion and Linn Counties.



NO PHOTO AVAILABLE

Tax Lot ID	093E30DB02500
Acreage	0.37
Avg % Slope	4.79
Property Class	COMMERCIAL VACANT
Zoning	Commercial
Land Value	$56,160
Improvement Value	$0
Total Value	$56,160
Utilization Ratio	0
Brownfield	Non-Suspect

Typology	Small Commercial
Status	Undeveloped
UGB	Mill City
City Limit	Mill City
Storefront Appeal	N/A
Business Type	N/A
Tourism	No
Site Configuration	Good
Distance to I5 (mi)	27.07
Field Notes	N/A

Land values per County assessor, 2016. I5 distance indicative and does not reflect driving distance.

Path: X:\0612.03 Business Oregon\Projects\Property Cutsheets\v2\Prop1_SR22 & NW 7th Ave.mxd
Print Date: 11/30/2016
Approved By: sotto
Produced By: GIS_Admin1
Project: 0612.01

Property 2
718 Northwest Santiam Boulevard

Mill City, Oregon

BASELINE SCORE

5

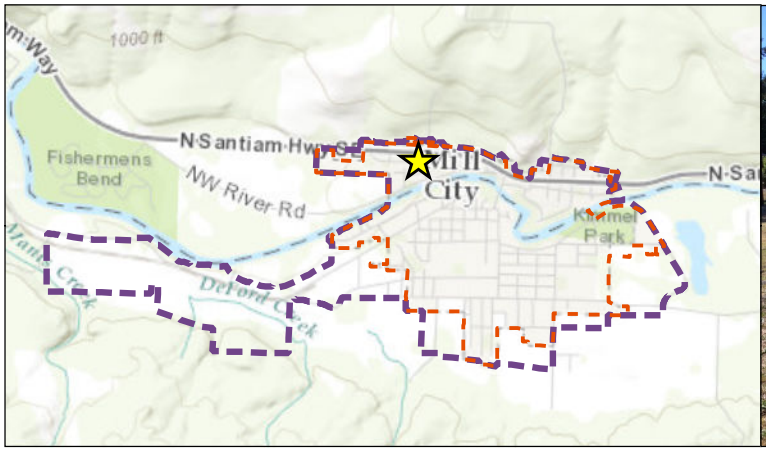
Baseline score generated from ranked variables. A higher score indicates the property is considered more desirable for development. Maximum value = 5.

Legend

- Identified Developable Parcel
- City Limits
- Urban Growth Boundary
- Tax Lot

0 50 100
Feet

Source: Aerial photograph obtained from Linn County. Site location basemap obtained from Esri ArcGIS Online. Parcel boundaries and streets obtained from Marion and Linn Counties.



Tax Lot ID	093E30DB02700
Acreage	0.61
Avg % Slope	3.55
Property Class	Commercial Vacant
Zoning	Commercial
Land Value	$83,110
Improvement Value	$0
Total Value	$83,110
Utilization Ratio	0.00%
Brownfield	Non-Suspect

Typology	Large Commercial
Status	Vacant
UGB	Mill City
City Limit	Mill City
Storefront Appeal	N/A
Business Type	N/A
Tourism	No
Site Configuration	Good
Distance to I5 (mi)	27.04
Field Notes	Buildings cleared

Land values per County assessor, 2016. I5 distance indicative and does not reflect driving distance.

Path: X:\0612.03 Business Oregon\Projects\Property Cutsheets\v2\Prop2_718 NW Santiam Blvd.mxd
Print Date: 11/22/2016
Approved By: sotto
Produced By: GIS_Admin1
Project: 0612.01

Property 3
415 Northwest Santiam Boulevard

Mill City, Oregon

BASELINE SCORE

4

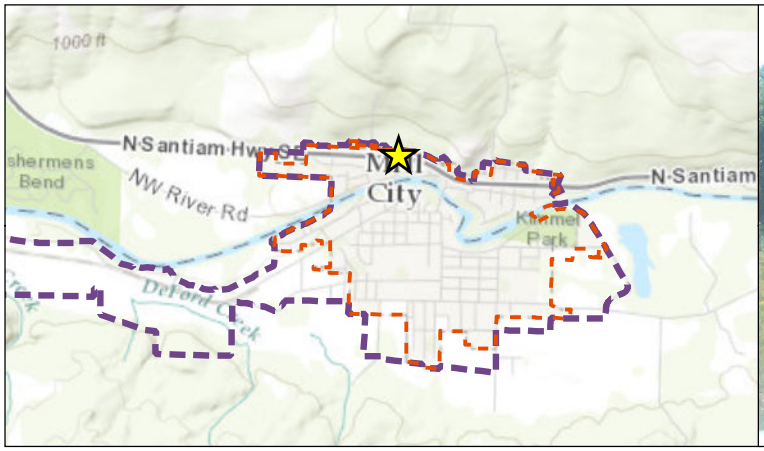
Baseline score generated from ranked variables. A higher score indicates the property is considered more desirable for development. Maximum value = 5.

Legend

- Identified Developable Parcel
- City Limits
- Urban Growth Boundary
- Tax Lot

0 50 100
Feet

Source: Aerial photograph obtained from Linn County. Site location basemap obtained from Esri ArcGIS Online. Parcel boundaries and streets obtained from Marion and Linn Counties.



Tax Lot ID	093E30DA00400
Acreage	0.34
Avg % Slope	5.58
Property Class	Residential Vacant
Zoning	Commercial
Land Value	$35,660
Improvement Value	$0
Total Value	$35,660
Utilization Ratio	0.00%
Brownfield	Non-Suspect

Typology	Small Commercial
Status	Undeveloped
UGB	Mill City
City Limit	Mill City
Storefront Appeal	N/A
Business Type	None
Tourism	No
Site Configuration	Fair
Distance to I5 (mi)	27.18
Field Notes	N/A

Land values per County assessor, 2016. I5 distance indicative and does not reflect driving distance.

Path: X:\0612.03 Business Oregon\Projects\Property Cutsheets\v2\Prop3_415 NW Santiam Blvd.mxd
Print Date: 11/22/2016
Approved By: sotto
Produced By: GIS_Admin1
Project: 0612.01

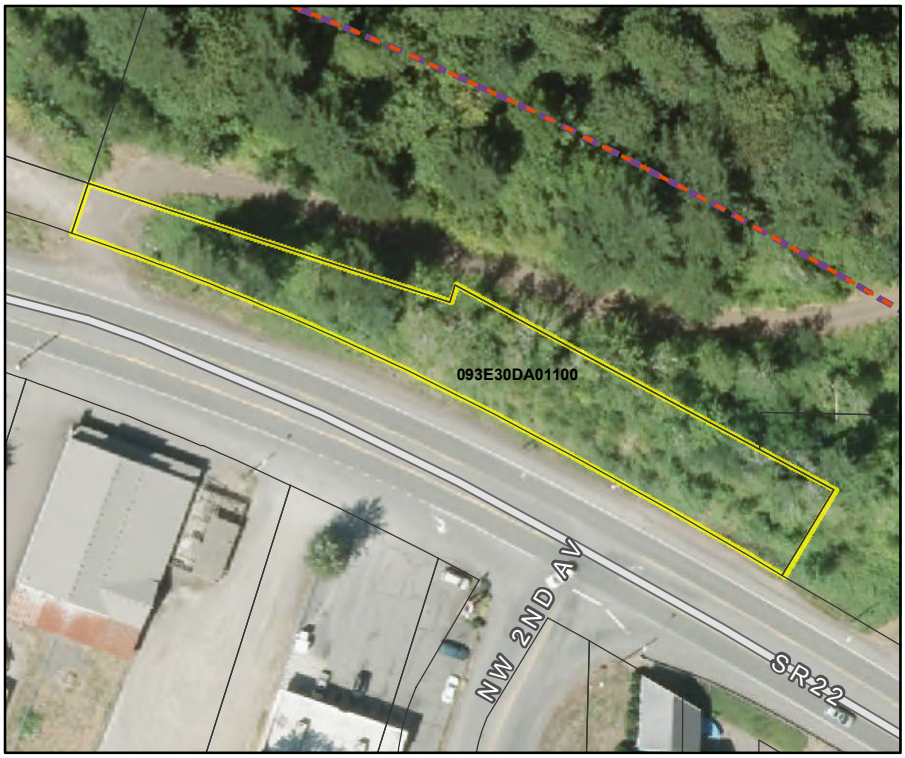
Property 4
223 Northwest Santiam Boulevard

Mill City
Oregon

BASELINE SCORE

4

Baseline score generated from ranked variables. A higher score indicates the property is considered more desirable for development. Maximum value = 5.

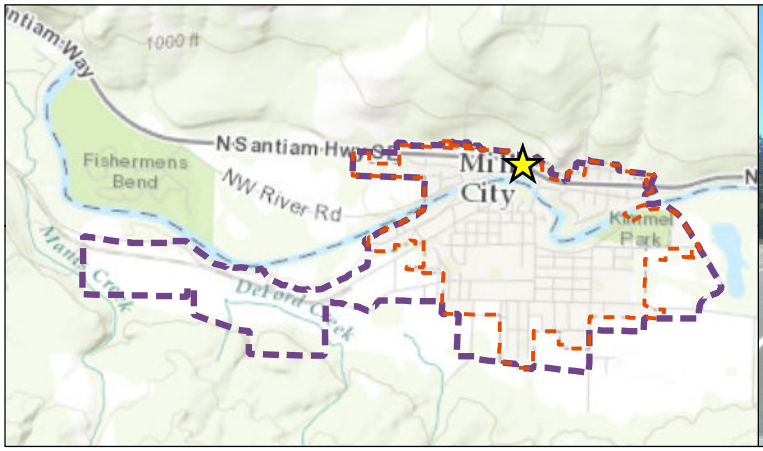


Legend

- Identified Developable Parcel
- City Limits
- Urban Growth Boundary
- Tax Lot

0 50 100
Feet

Source: Aerial photograph obtained from Linn County. Site location basemap obtained from Esri ArcGIS Online. Parcel boundaries and streets obtained from Marion and Linn Counties.



Tax Lot ID	093E30DA01100	**Typology**	Small Commercial
Acreage	0.40	**Status**	Undeveloped
Avg % Slope	12.25	**UGB**	Mill City
Property Class	State-Owned	**City Limit**	Mill City
Zoning	Commercial	**Storefront Appeal**	N/A
Land Value	$17,180	**Business Type**	None
Improvement Value	$0	**Tourism**	No
Total Value	$17,180	**Site Configuration**	Poor
Utilization Ratio	0.00%	**Distance to I5 (mi)**	27.29
Brownfield	N/A	**Field Notes**	Long, narrow/steep grade

Land values per County assessor, 2016. I5 distance indicative and does not reflect driving distance.

Path: X:\0612.03 Business Oregon\Projects\Property Cutsheets\v2\Prop4_223 NW Santiam Blvd.mxd
Print Date: 11/22/2016
Approved By: sotto
Produced By: GIS_Admin1
Project: 0612.01

Property 5
650 North Santiam Highway Gates, Oregon

BASELINE SCORE

3

Baseline score generated from ranked variables. A higher score indicates the property is considered more desirable for development. Maximum value = 5.

Legend

- Identified Developable Parcel
- City Limits
- Urban Growth Boundary
- Tax Lot

0 50 100
Feet

Source: Aerial photograph obtained from Linn County. Site location basemap obtained from Esri ArcGIS Online. Parcel boundaries and streets obtained from Marion and Linn Counties.

Tax Lot ID	093E27DB01100	**Typology**	Large Commercial
Acreage	0.62	**Status**	Undeveloped
Avg % Slope	2.74	**UGB**	Gates
Property Class	Commercial Improved	**City Limit**	Gates
Zoning	Commercial	**Storefront Appeal**	N/A
Land Value	$66,960	**Business Type**	N/A
Improvement Value	$2,000	**Tourism**	No
Total Value	$68,960	**Site Configuration**	Good
Utilization Ratio	2.99%	**Distance to I5 (mi)**	29.70
Brownfield	Non-Suspect	**Field Notes**	N/A

Land values per County assessor, 2016. I5 distance indicative and does not reflect driving distance.

Path: X:\0612.03 Business Oregon\Projects\Property Cutsheets\v2\Prop5_650 N Santiam Hwy.mxd
Print Date: 11/22/2016
Approved By: sotto
Produced By: GIS_Admin1
Project: 0612.01

Property 6
West Central Avenue & Louisa Street

Gates, Oregon

BASELINE SCORE

3

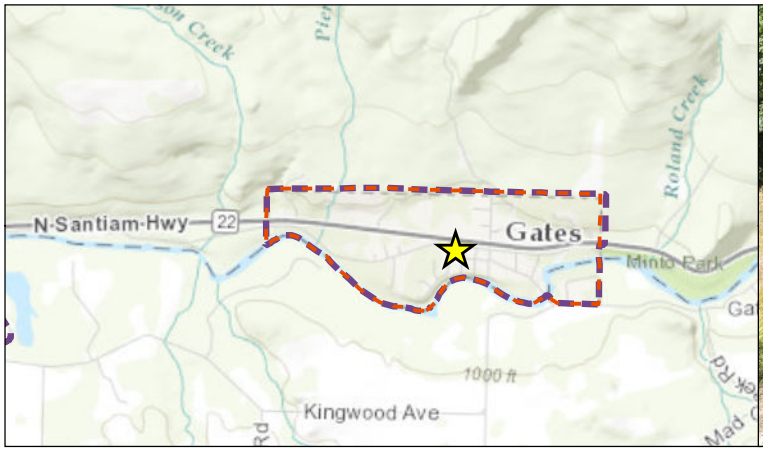
Baseline score generated from ranked variables. A higher score indicates the property is considered more desirable for development. Maximum value = 5.

Legend

- Identified Developable Parcel
- City Limits
- Urban Growth Boundary
- Tax Lot

0 50 100
Feet

Source: Aerial photograph obtained from Linn County. Site location basemap obtained from Esri ArcGIS Online. Parcel boundaries and streets obtained from Marion and Linn Counties.



Tax Lot ID	093E27DD00900	**Typology**	Large Commercial
Acreage	0.57	**Status**	Undeveloped
Avg % Slope	0.64	**UGB**	Gates
Property Class	Commercial Vacant	**City Limit**	Gates
Zoning	Commercial	**Storefront Appeal**	N/A
Land Value	$59,980	**Business Type**	N/A
Improvement Value	$0	**Tourism**	No
Total Value	$59,980	**Site Configuration**	Good
Utilization Ratio	0.00%	**Distance to I5 (mi)**	30.04
Brownfield	Non-Suspect	**Field Notes**	N/A

Land values per County assessor, 2016. I5 distance indicative and does not reflect driving distance.

Path: X:\0612.03 Business Oregon\Projects\Property Cutsheets\v2\Prop6_W Central Ave & Louisa St.mxd
Print Date: 11/22/2016
Approved By: sotto
Produced By: GIS_Admin1
Project: 0612.01

Property 7
301-375 Southeast Fairview Street

Mill City, Oregon

BASELINE SCORE

3

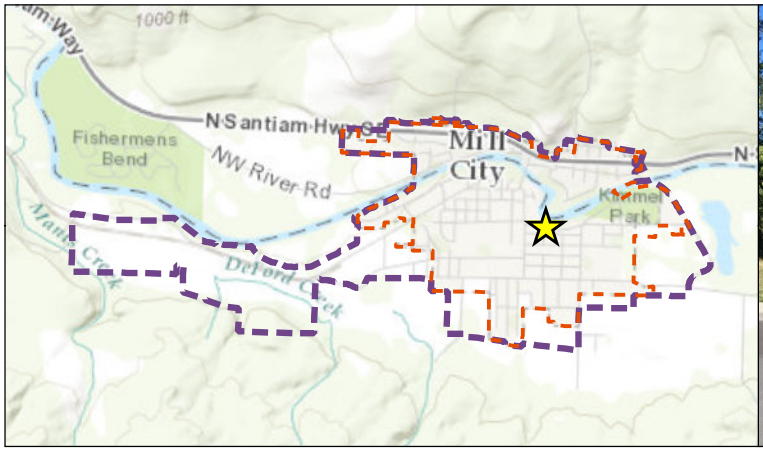
Baseline score generated from ranked variables. A higher score indicates the property is considered more desirable for development. Maximum value = 5.

Legend

- Identified Developable Parcel
- City Limits
- Urban Growth Boundary
- Tax Lot

0 75 150
Feet

Source: Aerial photograph obtained from Linn County. Site location basemap obtained from Esri ArcGIS Online. Parcel boundaries and streets obtained from Marion and Linn Counties.



Tax Lot ID	09S03E29CC00804	**Typology**	Large Commercial
Acreage	1.06	**Status**	Undeveloped
Avg % Slope	2.63	**UGB**	Mill City
Property Class	RESIDENTIAL VACANT	**City Limit**	Mill City
Zoning	Commercial	**Storefront Appeal**	N/A
Land Value	$78,480	**Business Type**	N/A
Improvement Value	$0	**Tourism**	No
Total Value	$78,480	**Site Configuration**	Fair
Utilization Ratio	0.00%	**Distance to I5 (mi)**	27.58
Brownfield	Non-Suspect	**Field Notes**	For sale

Land values per County assessor, 2016. I5 distance indicative and does not reflect driving distance.

Path: X:\0612.03 Business Oregon\Projects\Property Cutsheets\v2\Prop7_301-375 SE Fairview St.mxd
Print Date: 11/22/2016
Approved By: sotto
Produced By: GIS_Admin1
Project: 0612.01

Property 8
250 Northwest 9th Avenue Mill City, Oregon

BASELINE SCORE

3

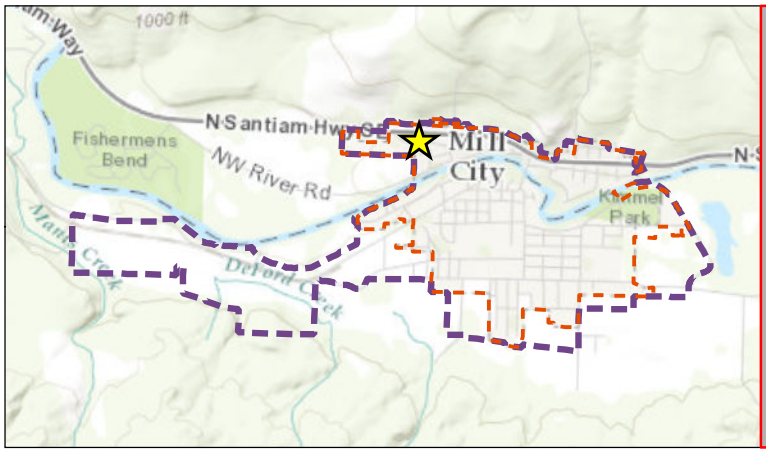
Baseline score generated from ranked variables. A higher score indicates the property is considered more desirable for development. Maximum value = 5.

Legend

- Identified Developable Parcel
- City Limits
- Urban Growth Boundary
- Tax Lot

0 50 100
Feet

Source: Aerial photograph obtained from Linn County. Site location basemap obtained from Esri ArcGIS Online. Parcel boundaries and streets obtained from Marion and Linn Counties.



NO PHOTO AVAILABLE

Tax Lot ID	093E30DB03401	**Typology**	Small Commercial
Acreage	0.32	**Status**	Undeveloped
Avg % Slope	2.25	**UGB**	Mill City
Property Class	Commercial Vacant	**City Limit**	Mill City
Zoning	Commercial	**Storefront Appeal**	N/A
Land Value	$30,960	**Business Type**	N/A
Improvement Value	$0	**Tourism**	No
Total Value	$30,960	**Site Configuration**	Good
Utilization Ratio	0.00%	**Distance to I5 (mi)**	26.94
Brownfield	Non-Suspect	**Field Notes**	N/A

Land values per County assessor, 2016. I5 distance indicative and does not reflect driving distance.

Path: X:\0612.03 Business Oregon\Projects\Property Cutsheets\v2\Prop8_250 NW 9th Ave.mxd
Print Date: 11/22/2016
Approved By: sotto
Produced By: GIS_Admin1
Project: 0612.01

Property 9
125 Detroit Avenue South

Detroit, Oregon

BASELINE SCORE

3

Baseline score generated from ranked variables. A higher score indicates the property is considered more desirable for development. Maximum value = 5.

Legend

- Identified Developable Parcel
- City Limits
- Urban Growth Boundary
- Tax Lot

0 50 100
Feet

Source: Aerial photograph and site location basemap obtained from Esri ArcGIS Online. Parcel boundaries and streets obtained from Marion and Linn Counties.

Tax Lot ID	105E01CB07500
Acreage	0.43
Avg % Slope	1.31
Property Class	Commercial Vacant
Zoning	Commercial
Land Value	$90,600
Improvement Value	$0
Total Value	$90,600
Utilization Ratio	0.00%
Brownfield	Non-Suspect

Typology	Small Commercial
Status	Undeveloped
UGB	N/A
City Limit	Detroit
Storefront Appeal	N/A
Business Type	None
Tourism	No
Site Configuration	Good
Distance to I5 (mi)	43.00
Field Notes	N/A

Land values per County assessor, 2016. I5 distance indicative and does not reflect driving distance.

Path: X:\0612.03 Business Oregon\Projects\Property Cutsheets\v2\Prop9_125 Detroit Ave S.mxd
Print Date: 11/22/2016
Approved By: sotto
Produced By: GIS_Admin1
Project: 0612.01

Property 10
112 North Santiam Highway Idanha, Oregon

BASELINE SCORE

3

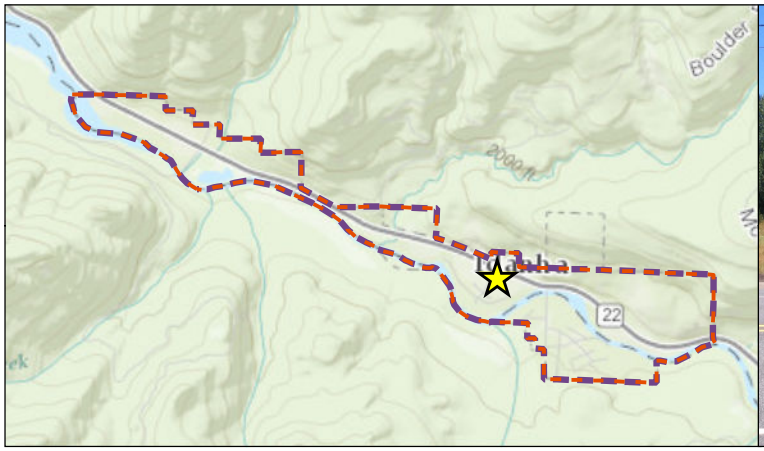
Baseline score generated from ranked variables. A higher score indicates the property is considered more desirable for development. Maximum value = 5.

Legend

- Identified Developable Parcel
- City Limits
- Urban Growth Boundary
- Tax Lot

0 50 100
Feet

Source: Aerial photograph and site location basemap obtained from Esri ArcGIS Online. Parcel boundaries and streets obtained from Marion and Linn Counties.



Tax Lot ID	106E16D 01400
Acreage	0.48
Avg % Slope	0.85
Property Class	Commercial Vacant
Zoning	Commercial
Land Value	$6,990
Improvement Value	$0
Total Value	$6,990
Utilization Ratio	0.00%
Brownfield	Non-Suspect

Typology	Small Commercial
Status	Undeveloped
UGB	Idahna
City Limit	Idanha
Storefront Appeal	N/A
Business Type	None
Tourism	No
Site Configuration	Good
Distance to I5 (mi)	47.00
Field Notes	Neighboring parcel blocks street access

Land values per County assessor, 2016. I5 distance indicative and does not reflect driving distance.

Path: X:\0612.03 Business Oregon\Projects\Property Cutsheets\v2\Prop10_112 N Santiam Hwy.mxd
Print Date: 11/23/2016
Approved By: sotto
Produced By: GIS_Admin1
Project: 0612.01

Property 11
110 O'Toole Street Gates, Oregon

BASELINE SCORE

2

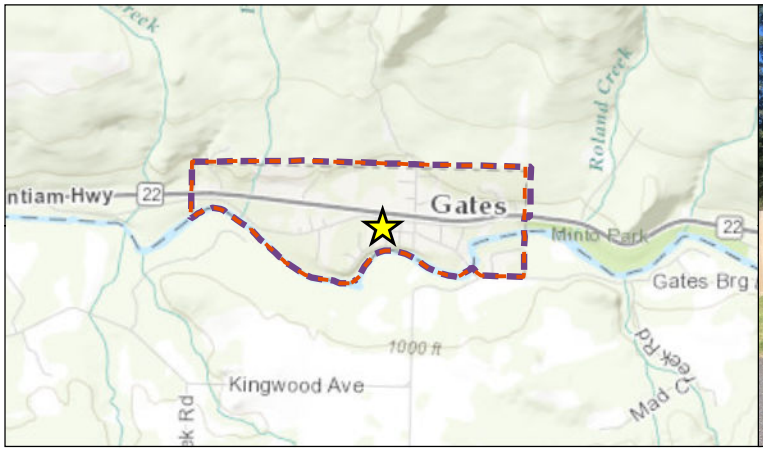
Baseline score generated from ranked variables. A higher score indicates the property is considered more desirable for development. Maximum value = 5.

Legend

- Identified Developable Parcel
- City Limits
- Urban Growth Boundary
- Tax Lot

0 50 100
Feet

Source: Aerial photograph and site location basemap obtained from Esri ArcGIS Online. Parcel boundaries and streets obtained from Marion and Linn Counties.



Tax Lot ID	093E27DD00902
Acreage	0.29
Avg % Slope	1.83
Property Class	Commercial Vacant
Zoning	Commercial
Land Value	$30,020
Improvement Value	$0
Total Value	$30,020
Utilization Ratio	0.00%
Brownfield	Non-Suspect

Typology	Small Commercial
Status	Undeveloped
UGB	Gates
City Limit	Gates
Storefront Appeal	N/A
Business Type	None
Tourism	No
Site Configuration	Good
Distance to I5 (mi)	30.06
Field Notes	N/A

Land values per County assessor, 2016. I5 distance indicative and does not reflect driving distance.

Path: X:\0612.03 Business Oregon\Projects\Property Cutsheets\v2\Prop11_110 O'Toole St.mxd
Print Date: 11/23/2016
Approved By: sotto
Produced By: GIS_Admin1
Project: 0612.01

Property 12
West Sorbin Avenue & Santiam Street

Gates, Oregon

BASELINE SCORE
2

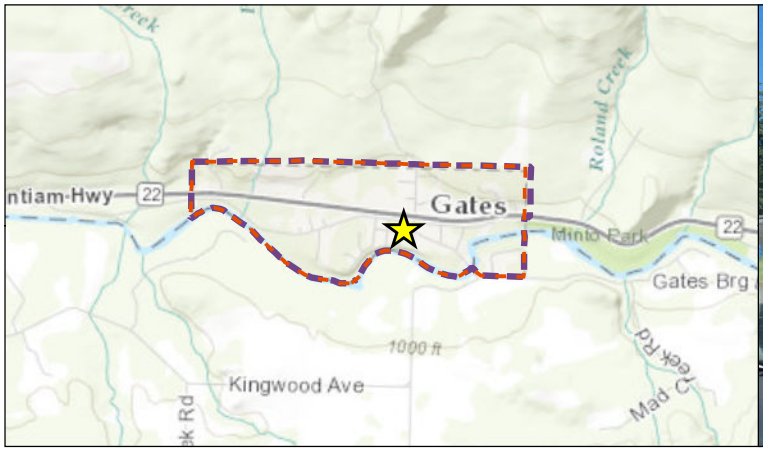
Baseline score generated from ranked variables. A higher score indicates the property is considered more desirable for development. Maximum value = 5.

Legend

- Identified Developable Parcel
- City Limits
- Urban Growth Boundary
- Tax Lot

0 50 100
Feet

Source: Aerial photograph and site location basemap obtained from Esri ArcGIS Online. Parcel boundaries and streets obtained from Marion and Linn Counties.



Tax Lot ID	093E27DD01200	**Typology**	Small Commercial
Acreage	0.34	**Status**	Undeveloped
Avg % Slope	1.66	**UGB**	Gates
Property Class	Commercial Vacant	**City Limit**	Gates
Zoning	Commercial	**Storefront Appeal**	N/A
Land Value	$54,000	**Business Type**	N/A
Improvement Value	$0	**Tourism**	No
Total Value	$54,000	**Site Configuration**	Good
Utilization Ratio	0.00%	**Distance to I5 (mi)**	30.15
Brownfield	Non-Suspect	**Field Notes**	N/A

Land values per County assessor, 2016. I5 distance indicative and does not reflect driving distance.

Path: X:\0612.03 Business Oregon\Projects\Property Cutsheetsv2\Prop12_W Sorbin Ave & Santiam St.mxd
Print Date: 11/23/2016
Approved By: sotto
Produced By: GIS_Admin1
Project: 0612.01

Property 13
220 Northeast 7th Avenue

Mill City, Oregon

BASELINE SCORE

2

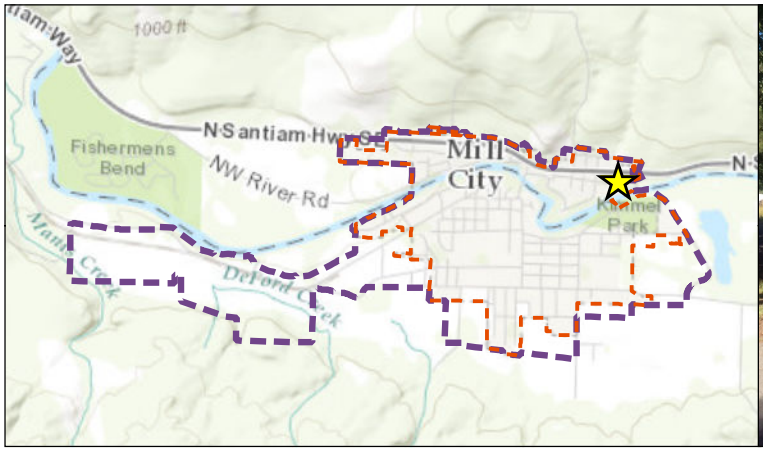
Baseline score generated from ranked variables. A higher score indicates the property is considered more desirable for development. Maximum value = 5.

Legend

- Identified Developable Parcel
- City Limits
- Urban Growth Boundary
- Tax Lot

0 50 100
Feet

Source: Aerial photograph and site location basemap obtained from Esri ArcGIS Online. Parcel boundaries and streets obtained from Marion and Linn Counties.



Tax Lot ID	093E29CD02100
Acreage	0.50
Avg % Slope	3.48
Property Class	Residential Vacant
Zoning	Commercial
Land Value	$45,960
Improvement Value	$0
Total Value	$45,960
Utilization Ratio	0.00%
Brownfield	Non-Suspect

Typology	Small Commercial
Status	Undeveloped
UGB	Mill City
City Limit	Mill City
Storefront Appeal	N/A
Business Type	None
Tourism	No
Site Configuration	Good
Distance to I5 (mi)	27.82
Field Notes	N/A

Land values per County assessor, 2016. I5 distance indicative and does not reflect driving distance.

Path: X:\0612.03 Business Oregon\Projects\Property Cutsheets\v2\Prop13_220 NE 7th Ave.mxd
Print Date: 11/23/2016
Approved By: sotto
Produced By: GIS_Admin1
Project: 0612.01

Property 14
382 Northeast Santiam Boulevard

Mill City, Oregon

BASELINE SCORE

2

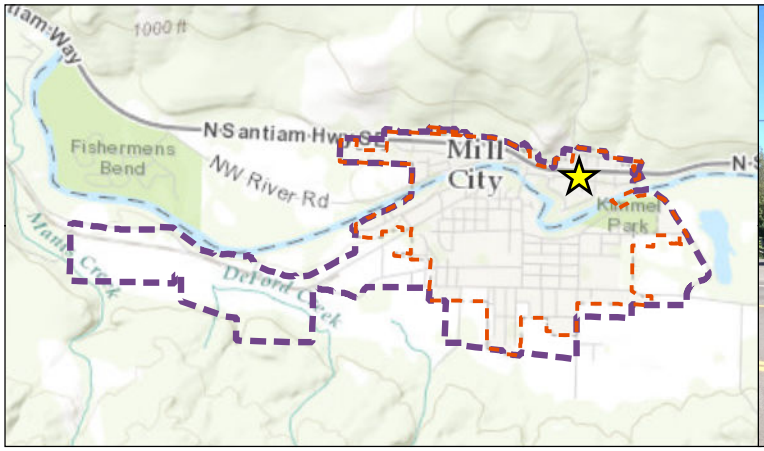
Baseline score generated from ranked variables. A higher score indicates the property is considered more desirable for development. Maximum value = 5.

Legend

- Identified Developable Parcel
- City Limits
- Urban Growth Boundary
- Tax Lot

0 50 100
Feet

Source: Aerial photograph and site location basemap obtained from Esri ArcGIS Online. Parcel boundaries and streets obtained from Marion and Linn Counties.



Tax Lot ID	093E29CB02300
Acreage	0.38
Avg % Slope	4.26
Property Class	Commercial Improved
Zoning	Commercial
Land Value	$60,180
Improvement Value	$71,590
Total Value	$131,770
Utilization Ratio	118.96%
Brownfield	Suspect

Typology	Small Commercial
Status	Vacant
UGB	Mill City
City Limit	Mill City
Storefront Appeal	Poor
Business Type	Auto Related
Tourism	No
Site Configuration	Good
Distance to I5 (mi)	27.66
Field Notes	N/A

Land values per County assessor, 2016. I5 distance indicative and does not reflect driving distance.

Path: X:\0612.03 Business Oregon\Projects\Property Cutsheets\v2\Prop14_382 NE Santiam Blvd.mxd
Print Date: 11/23/2016
Approved By: sotto
Produced By: GIS_Admin1
Project: 0612.01

Property 15
1090 Northwest Alder Street Mill City, Oregon

BASELINE SCORE
1

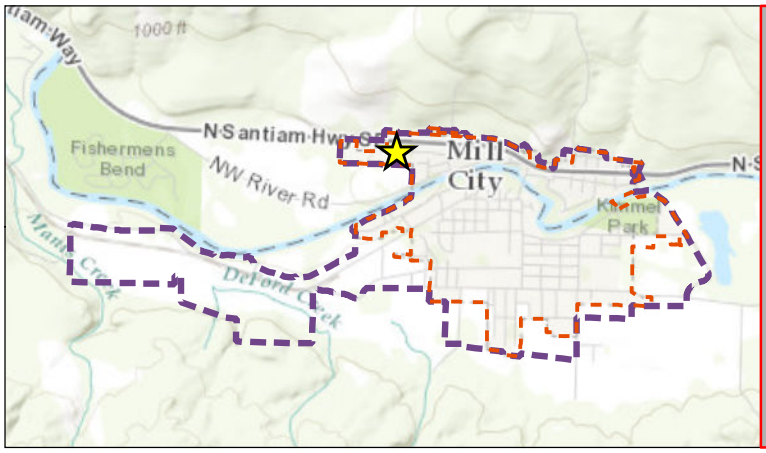
Baseline score generated from ranked variables. A higher score indicates the property is considered more desirable for development. Maximum value = 5.

Legend

- Identified Developable Parcel
- City Limits
- Urban Growth Boundary
- Tax Lot

0 50 100
Feet

Source: Aerial photograph and site location basemap obtained from Esri ArcGIS Online. Parcel boundaries and streets obtained from Marion and Linn Counties.



NO PHOTO AVAILABLE

Tax Lot ID	093E30CA01200	**Typology**	Small Commercial
Acreage	0.26	**Status**	Undeveloped
Avg % Slope	1.69	**UGB**	Mill City
Property Class	Residential Vacant	**City Limit**	Mill City
Zoning	Commercial	**Storefront Appeal**	N/A
Land Value	$33,000	**Business Type**	N/A
Improvement Value	$0	**Tourism**	No
Total Value	$33,000	**Site Configuration**	Poor
Utilization Ratio	0.00%	**Distance to I5 (mi)**	26.86
Brownfield	Non-Suspect	**Field Notes**	Steep grade

Land values per County assessor, 2016. I5 distance indicative and does not reflect driving distance.

Path: X:\0612.03 Business Oregon\Projects\Property Cutsheetsv2\Prop15_1090 NW Alder St.mxd
Print Date: 11/23/2016
Approved By: sotto
Produced By: GIS_Admin1
Project: 0612.01

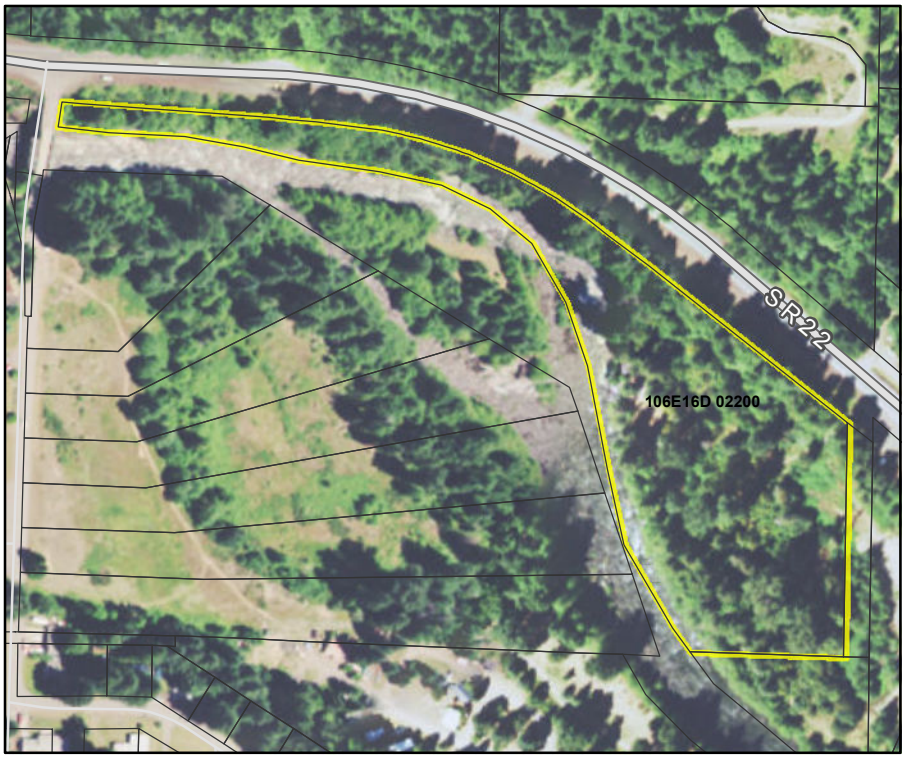
Property 16
North Santiam Highway & Church Street

Idanha, Oregon

BASELINE SCORE

1

Baseline score generated from ranked variables. A higher score indicates the property is considered more desirable for development. Maximum value = 5.

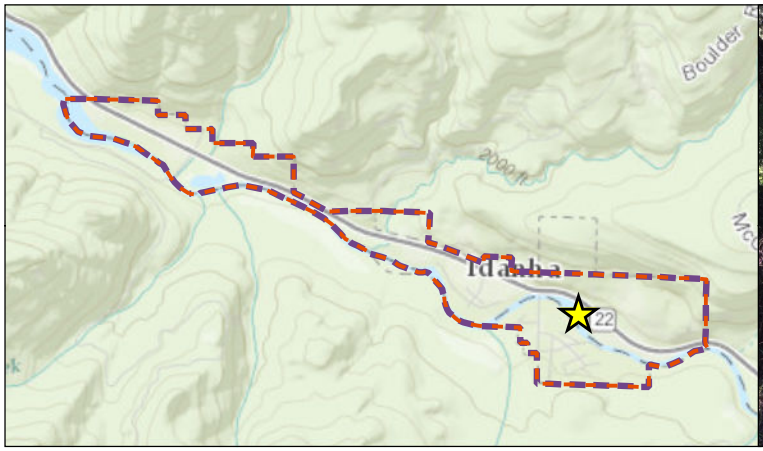


Legend

- Identified Developable Parcel
- City Limits
- Urban Growth Boundary
- Tax Lot

0 150 300
Feet

Source: Aerial photograph and site location basemap obtained from Esri ArcGIS Online. Parcel boundaries and streets obtained from Marion and Linn Counties.



Tax Lot ID	106E16D 02200	**Typology**	Large Industrial
Acreage	5.52	**Status**	Undeveloped
Avg % Slope	7.00	**UGB**	Idahna
Property Class	Commercial Vacant	**City Limit**	Idanha
Zoning	Industrial	**Storefront Appeal**	N/A
Land Value	$84,580	**Business Type**	None
Improvement Value	$0	**Tourism**	No
Total Value	$84,580	**Site Configuration**	Fair
Utilization Ratio	0.00%	**Distance to I5 (mi)**	47.25
Brownfield	Non-Suspect	**Field Notes**	Dirt access road

Land values per County assessor, 2016. I5 distance indicative and does not reflect driving distance.

Path: X:\0612.03 Business Oregon\Projects\Property Cutsheets\v2\Prop16_N Santiam Hwy & Church St.mxd
Print Date: 11/23/2016
Approved By: sotto
Produced By: GIS_Admin1
Project: 0612.01

Property 17
212 North Santiam Highway Southeast

Gates, Oregon

BASELINE SCORE

1

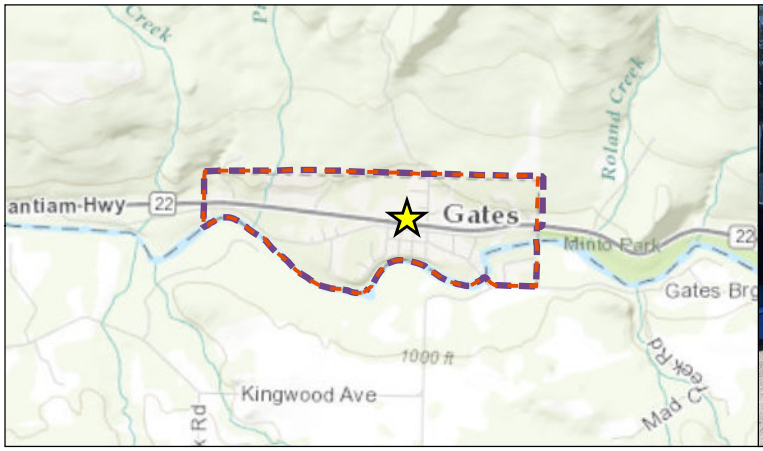
Baseline score generated from ranked variables. A higher score indicates the property is considered more desirable for development. Maximum value = 5.

Legend

- Identified Developable Parcel
- City Limits
- Urban Growth Boundary
- Tax Lot

0 50 100
Feet

Source: Aerial photograph and site location basemap obtained from Esri ArcGIS Online. Parcel boundaries and streets obtained from Marion and Linn Counties.



Tax Lot ID	093E27DA01700
Acreage	0.35
Avg % Slope	1.27
Property Class	Residential Improved Comm-Zone
Zoning	Commercial
Land Value	$61,450
Improvement Value	$23,680
Total Value	$85,130
Utilization Ratio	38.54%
Brownfield	Non-Suspect

Typology	Small Commercial
Status	Vacant
UGB	Gates
City Limit	Gates
Storefront Appeal	Poor
Business Type	None
Tourism	No
Site Configuration	Good
Distance to I5 (mi)	30.08
Field Notes	N/A

Land values per County assessor, 2016. I5 distance indicative and does not reflect driving distance.

Path: X:\0612.03 Business Oregon\Projects\Property Cutsheets\v2\Prop17_212 N Santiam Hwy SE.mxd
Print Date: 11/28/2016
Approved By: sotto
Produced By: GIS_Admin1
Project: 0612.01

Property 18
829 Southwest 1st Street Mill City, Oregon

BASELINE SCORE
1

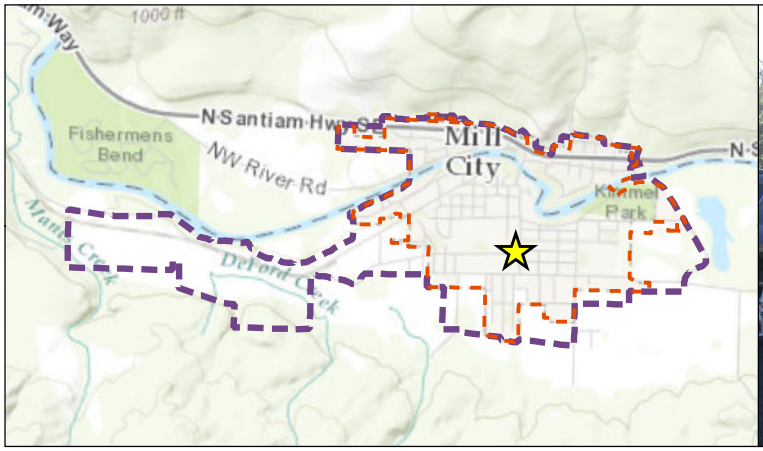
Baseline score generated from ranked variables. A higher score indicates the property is considered more desirable for development. Maximum value = 5.

Legend

- Identified Developable Parcel
- City Limits
- Urban Growth Boundary
- Tax Lot

0 50 100
Feet

Source: Aerial photograph and site location basemap obtained from Esri ArcGIS Online. Parcel boundaries and streets obtained from Marion and Linn Counties.



Tax Lot ID	09S03E31AA02200	**Typology**	Small Commercial
Acreage	0.44	**Status**	Vacant
Avg % Slope	1.12	**UGB**	Mill City
Property Class	Commercial Improved	**City Limit**	Mill City
Zoning	Commercial	**Storefront Appeal**	N/A
Land Value	$52,660	**Business Type**	N/A
Improvement Value	$4,660	**Tourism**	No
Total Value	$57,320	**Site Configuration**	Fair
Utilization Ratio	8.85%	**Distance to I5 (mi)**	27.57
Brownfield	Non-Suspect	**Field Notes**	Half parking, half field

Land values per County assessor, 2016. I5 distance indicative and does not reflect driving distance.

Path: X:\0612.03 Business Oregon\Projects\Property Cutsheets\v2\Prop18_829 SW 1st St.mxd
Print Date: 11/28/2016
Approved By: sotto
Produced By: GIS_Admin1
Project: 0612.01

Property 19
21937 Emma Street Southeast

Mehama, Oregon

BASELINE SCORE
0

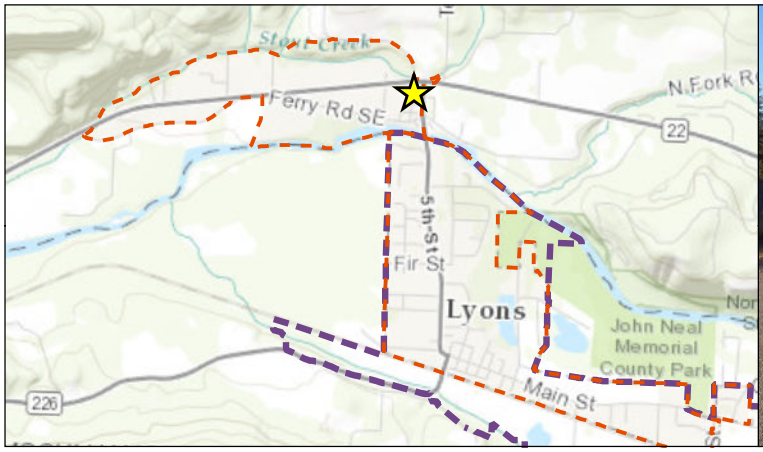
Baseline score generated from ranked variables. A higher score indicates the property is considered more desirable for development. Maximum value = 5.

Legend

- Identified Developable Parcel
- City Limits
- Urban Growth Boundary
- Tax Lot

0 50 100
Feet

Source: Aerial photograph and site location basemap obtained from Esri ArcGIS Online. Parcel boundaries and streets obtained from Marion and Linn Counties.



Tax Lot ID	092E18BC01000	**Typology**	Small Commercial
Acreage	0.26	**Status**	Undeveloped
Avg % Slope	1.57	**UGB**	N/A
Property Class	Residential Improved	**City Limit**	Mehama
Zoning	Commercial	**Storefront Appeal**	N/A
Land Value	$64,000	**Business Type**	None
Improvement Value	$25,660	**Tourism**	No
Total Value	$89,660	**Site Configuration**	Good
Utilization Ratio	40.09%	**Distance to I5 (mi)**	20.04
Brownfield	Non-Suspect	**Field Notes**	N/A

Land values per County assessor, 2016. I5 distance indicative and does not reflect driving distance.

Path: X:\0612.03 Business Oregon\Projects\Property Cutsheets\v2\Prop19_21937 Emma St SE.mxd
Print Date: 11/29/2016
Approved By: sotto
Produced By: GIS_Admin1
Project: 0612.01

Property 20
111 North Santiam Highway (1) Idanha, Oregon

BASELINE SCORE

0

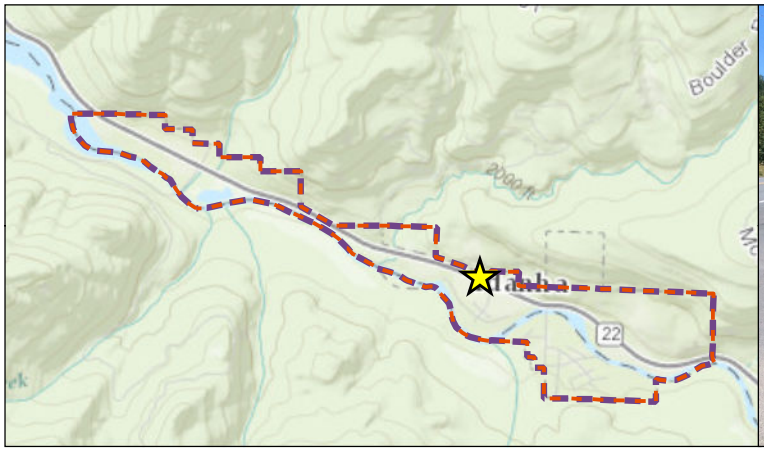
Baseline score generated from ranked variables. A higher score indicates the property is considered more desirable for development. Maximum value = 5.

Legend

- Identified Developable Parcel
- City Limits
- Urban Growth Boundary
- Tax Lot

0 50 100
Feet

Source: Aerial photograph and site location basemap obtained from Esri ArcGIS Online. Parcel boundaries and streets obtained from Marion and Linn Counties.

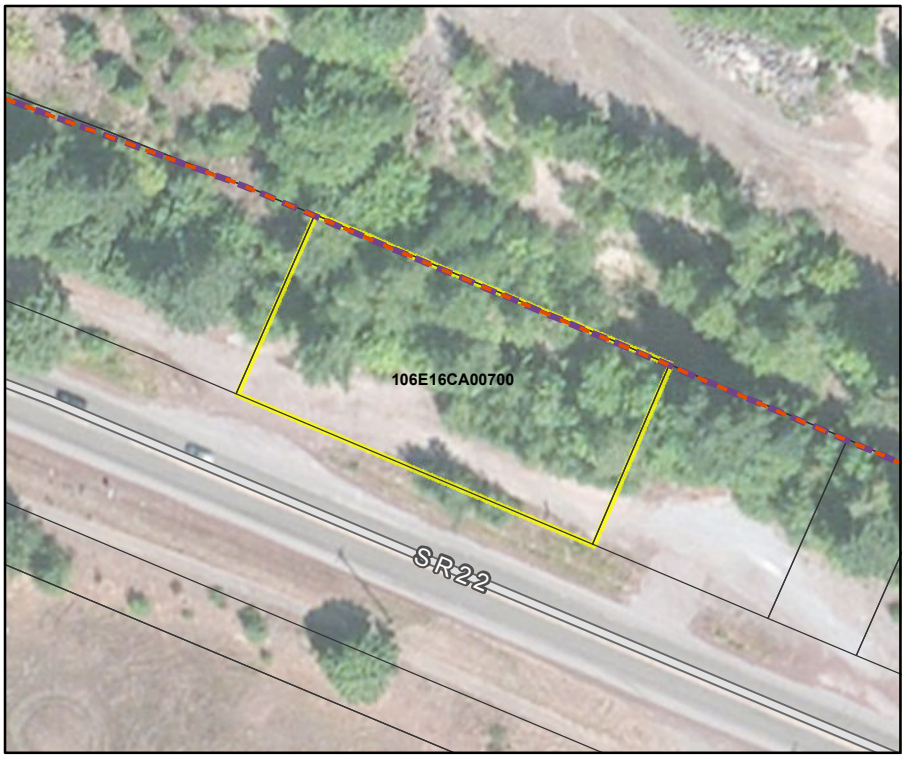


Tax Lot ID	106E16CA00400	**Typology**	Small Commercial
Acreage	0.35	**Status**	Undeveloped
Avg % Slope	10.66	**UGB**	Idahna
Property Class	Commercial Vacant	**City Limit**	Idanha
Zoning	Commercial	**Storefront Appeal**	N/A
Land Value	$36,000	**Business Type**	N/A
Improvement Value	$0	**Tourism**	No
Total Value	$36,000	**Site Configuration**	Fair
Utilization Ratio	0.00%	**Distance to I5 (mi)**	46.89
Brownfield	Non-Suspect	**Field Notes**	Flat, lots of trees

Land values per County assessor, 2016. I5 distance indicative and does not reflect driving distance.

Path: X:\0612.03 Business Oregon\Projects\Property Cutsheets\v2\Prop20_111 N Santiam Hwy (1).mxd
Print Date: 11/29/2016
Approved By: sotto
Produced By: GIS_Admin1
Project: 0612.01

Property 21
111 North Santiam Highway (2) Idanha, Oregon



BASELINE SCORE

0

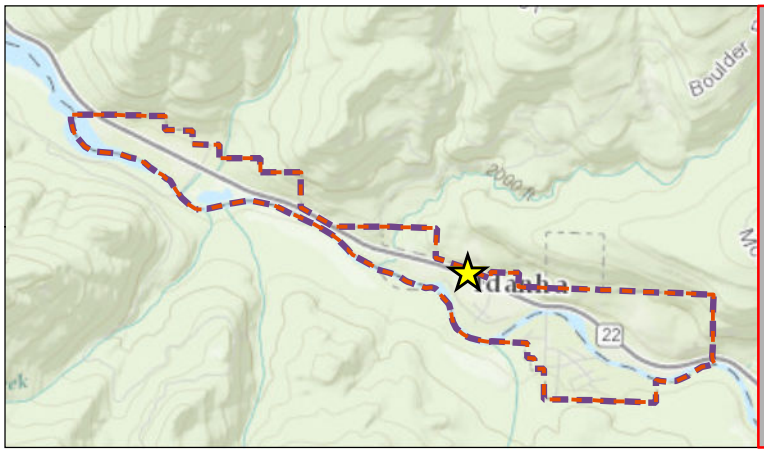
Baseline score generated from ranked variables. A higher score indicates the property is considered more desirable for development. Maximum value = 5.

Legend

- Identified Developable Parcel
- City Limits
- Urban Growth Boundary
- Tax Lot

0 50 100
Feet

Source: Aerial photograph and site location basemap obtained from Esri ArcGIS Online. Parcel boundaries and streets obtained from Marion and Linn Counties.



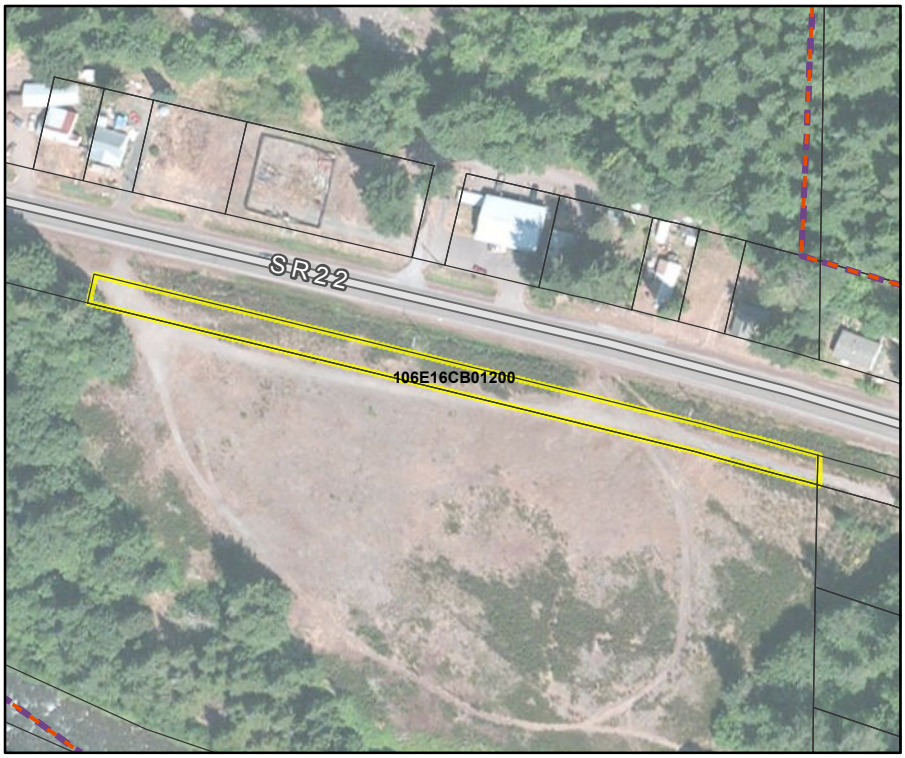
NO PHOTO AVAILABLE

Tax Lot ID	106E16CA00700	**Typology**	Small Commercial
Acreage	0.47	**Status**	Undeveloped
Avg % Slope	10.38	**UGB**	Idahna
Property Class	Commercial Vacant	**City Limit**	Idanha
Zoning	Commercial	**Storefront Appeal**	N/A
Land Value	$48,000	**Business Type**	N/A
Improvement Value	$0	**Tourism**	No
Total Value	$48,000	**Site Configuration**	Fair
Utilization Ratio	0.00%	**Distance to I5 (mi)**	46.83
Brownfield	Non-Suspect	**Field Notes**	N/A

Land values per County assessor, 2016. I5 distance indicative and does not reflect driving distance.

Path: X:\0612.03 Business Oregon\Projects\Property Cutsheets\v2\Prop21_111 N Santiam Hwy (2).mxd
Print Date: 11/29/2016
Approved By: sotto
Produced By: GIS_Admin1
Project: 0612.01

Property 22
401 North Santiam Highway Idanha, Oregon



BASELINE SCORE

0

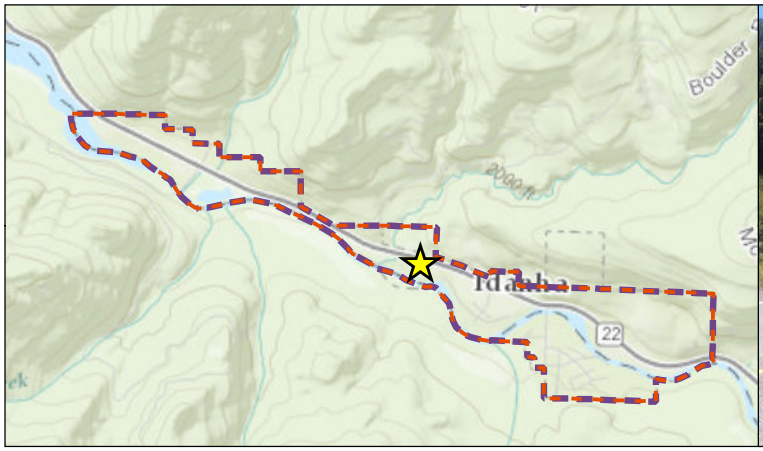
Baseline score generated from ranked variables. A higher score indicates the property is considered more desirable for development. Maximum value = 5.

Legend

- Identified Developable Parcel
- City Limits
- Urban Growth Boundary
- Tax Lot

0 100 200
Feet

Source: Aerial photograph and site location basemap obtained from Esri ArcGIS Online. Parcel boundaries and streets obtained from Marion and Linn Counties.



Tax Lot ID	106E16CB01200	**Typology**	Small Commercial
Acreage	0.54	**Status**	Undeveloped
Avg % Slope	4.37	**UGB**	Idahna
Property Class	Commercial Vacant	**City Limit**	Idanha
Zoning	Commercial	**Storefront Appeal**	N/A
Land Value	$22,760	**Business Type**	None
Improvement Value	$0	**Tourism**	No
Total Value	$22,760	**Site Configuration**	Poor
Utilization Ratio	0.00%	**Distance to I5 (mi)**	46.56
Brownfield	Non-Suspect	**Field Notes**	Long narrow road front parcel

Land values per County assessor, 2016. I5 distance indicative and does not reflect driving distance.

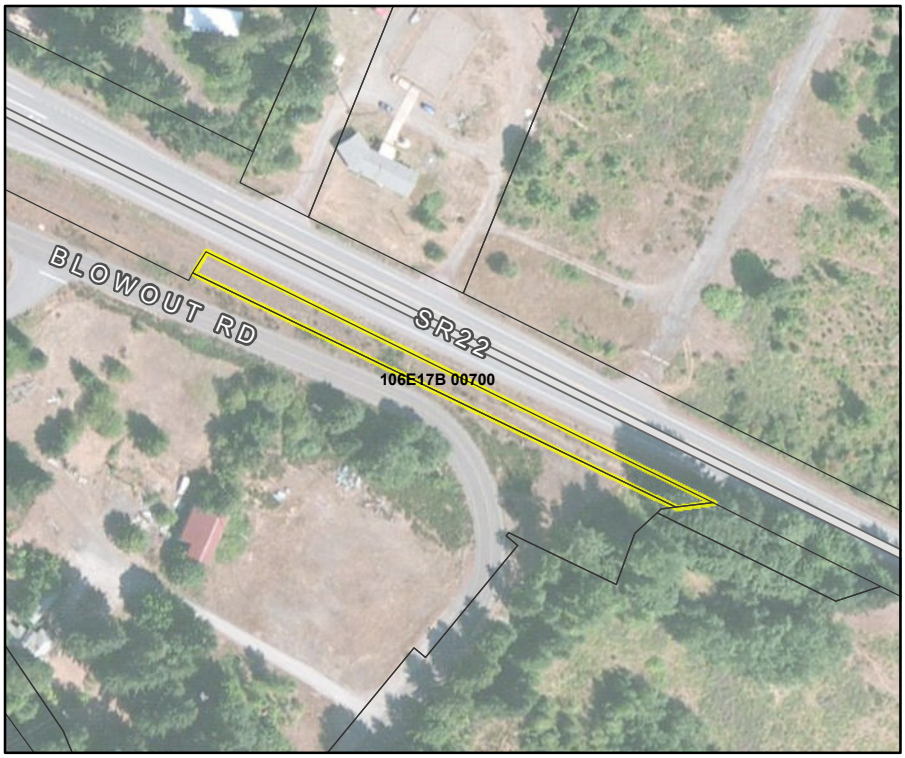
Path: X:\0612.03 Business Oregon\Projects\Property Cutsheets\v2\Prop22_401 N Santiam Hwy.mxd
Print Date: 11/29/2016
Approved By: sotto
Produced By: GIS_Admin1
Project: 0612.01

Property 23
Blowout Road

Idanha, Oregon

BASELINE SCORE
0

Baseline score generated from ranked variables. A higher score indicates the property is considered more desirable for development. Maximum value = 5.

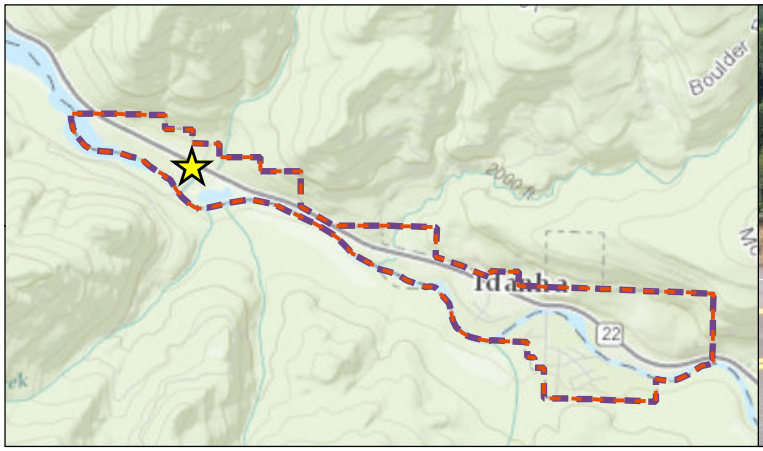


Legend

- Identified Developable Parcel
- City Limits
- Urban Growth Boundary
- Tax Lot

0 100 200
Feet

Source: Aerial photograph and site location basemap obtained from Esri ArcGIS Online. Parcel boundaries and streets obtained from Marion and Linn Counties.



Tax Lot ID	106E17B 00700	**Typology**	Small Commercial
Acreage	0.31	**Status**	Undeveloped
Avg % Slope	0.69	**UGB**	Idahna
Property Class	State	**City Limit**	Idanha
Zoning	Commercial	**Storefront Appeal**	N/A
Land Value	$16,990	**Business Type**	None
Improvement Value	$0	**Tourism**	No
Total Value	$16,990	**Site Configuration**	Poor
Utilization Ratio	0.00%	**Distance to I5 (mi)**	45.46
Brownfield	Non-Suspect	**Field Notes**	Long and narrow parcel

Land values per County assessor, 2016. I5 distance indicative and does not reflect driving distance.

Path: X:\0612.03 Business Oregon\Projects\Property Cutsheets\v2\Prop23_Blowout Rd.mxd
Print Date: 11/29/2016
Approved By: sotto
Produced By: GIS_Admin1
Project: 0612.01

Property 24
1324 Main Street

Lyons, Oregon

BASELINE SCORE
0

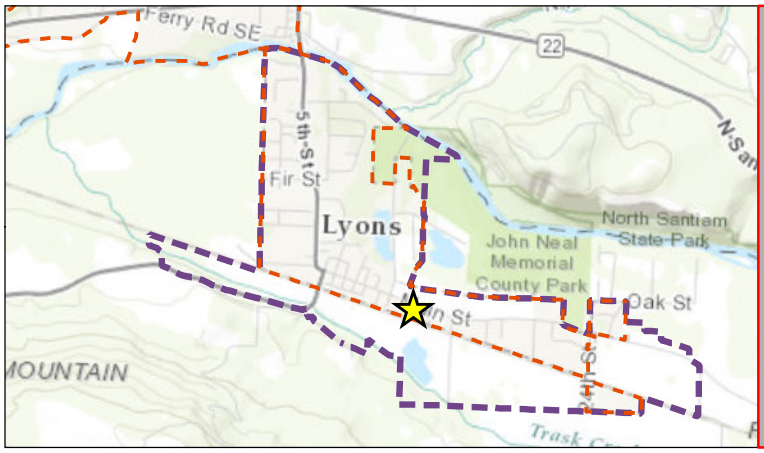
Baseline score generated from ranked variables. A higher score indicates the property is considered more desirable for development. Maximum value = 5.

Legend

- Identified Developable Parcel
- City Limits
- Urban Growth Boundary
- Tax Lot

0 50 100
Feet

Source: Aerial photograph and site location basemap obtained from Esri ArcGIS Online. Parcel boundaries and streets obtained from Marion and Linn Counties.



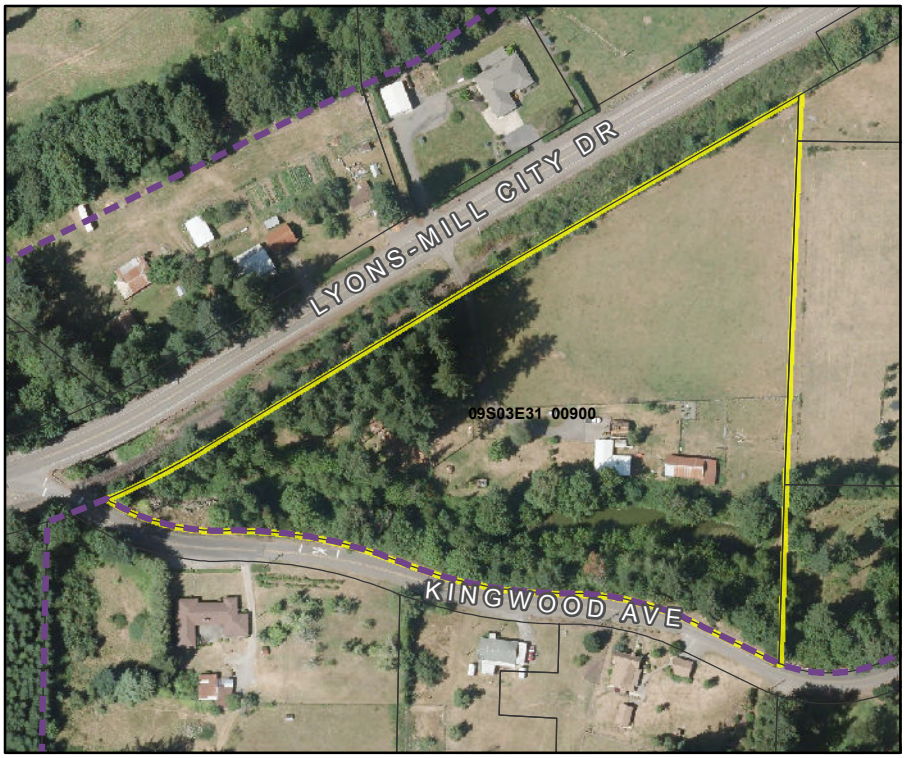
NO PHOTO AVAILABLE

Tax Lot ID	09S02E19DB02100	**Typology**	Small Commercial
Acreage	0.29	**Status**	Undeveloped
Avg % Slope	0.00	**UGB**	Lyons
Property Class	Commercial Vacant	**City Limit**	Lyons
Zoning	Commercial	**Storefront Appeal**	N/A
Land Value	$57,970	**Business Type**	N/A
Improvement Value	$0	**Tourism**	No
Total Value	$57,970	**Site Configuration**	Good
Utilization Ratio	0.00%	**Distance to I5 (mi)**	21.18
Brownfield	Non-Suspect	**Field Notes**	N/A

Land values per County assessor, 2016. I5 distance indicative and does not reflect driving distance.

Path: X:\0612.03 Business Oregon\Projects\Property Cutsheets\v2\Prop24_1324 Main St_Lyons.mxd
Print Date: 11/30/2016
Approved By: sotto
Produced By: GIS_Admin1
Project: 0612.01

Property 25
48210 Lyons Mill City Drive Mill City, Oregon



BASELINE SCORE

0

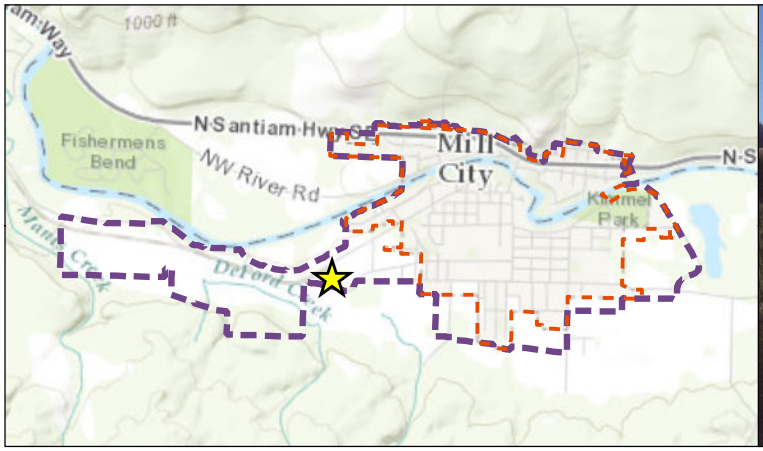
Baseline score generated from ranked variables. A higher score indicates the property is considered more desirable for development. Maximum value = 5.

Legend

- Identified Developable Parcel
- City Limits
- Urban Growth Boundary
- Tax Lot

0 125 250
Feet

Source: Aerial photograph and site location basemap obtained from Esri ArcGIS Online. Parcel boundaries and streets obtained from Marion and Linn Counties.



Tax Lot ID	09S03E31 00900	**Typology**	Large Industrial
Acreage	7.21	**Status**	Vacant
Avg % Slope	0.95	**UGB**	Mill City
Property Class	TRACT IMPROVED	**City Limit**	N/A
Zoning	Industrial	**Storefront Appeal**	N/A
Land Value	$118,430	**Business Type**	None
Improvement Value	$56,420	**Tourism**	No
Total Value	$174,850	**Site Configuration**	Good
Utilization Ratio	47.64%	**Distance to I5 (mi)**	26.83
Brownfield	Non-Suspect	**Field Notes**	Unknown business activity/appears to be farm

Land values per County assessor, 2016. I5 distance indicative and does not reflect driving distance.

Path: X:\0612.03 Business Oregon\Projects\Property Cutsheets\v2\Prop25_48210 Lyons Mill City Dr_Mill City.mxd
Print Date: 11/30/2016
Approved By: sotto
Produced By: GIS_Admin1
Project: 0612.01

Property 26
47601 East Lyons Mill City Drive

Lyons, Oregon

BASELINE SCORE

0

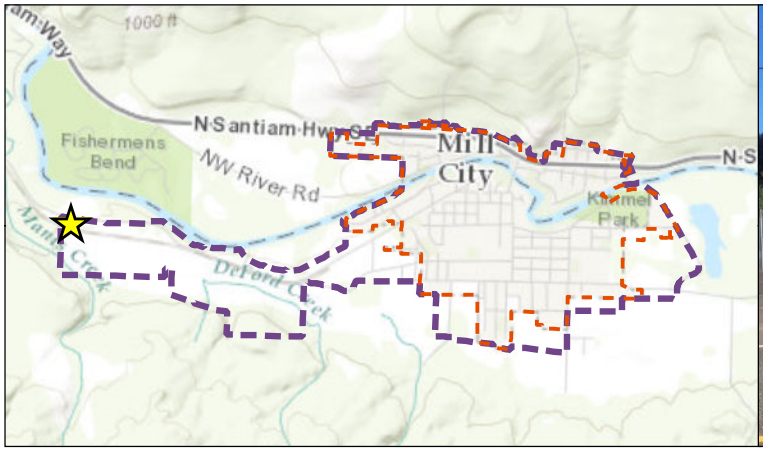
Baseline score generated from ranked variables. A higher score indicates the property is considered more desirable for development. Maximum value = 5.

Legend

- Identified Developable Parcel
- City Limits
- Urban Growth Boundary
- Tax Lot

0 75 150
Feet

Source: Aerial photograph and site location basemap obtained from Esri ArcGIS Online. Parcel boundaries and streets obtained from Marion and Linn Counties.



Tax Lot ID	09S02E36 01305	**Typology**	Small Industrial
Acreage	2.29	**Status**	Undeveloped
Avg % Slope	1.69	**UGB**	Mill City
Property Class	VACANT TRACT	**City Limit**	N/A
Zoning	Industrial	**Storefront Appeal**	N/A
Land Value	$59,670	**Business Type**	None
Improvement Value	$0	**Tourism**	No
Total Value	$59,670	**Site Configuration**	Good
Utilization Ratio	0.00%	**Distance to I5 (mi)**	25.71
Brownfield	Non-Suspect	**Field Notes**	N/A

Land values per County assessor, 2016. I5 distance indicative and does not reflect driving distance.

Path: X:\0612.03 Business Oregon\Projects\Property Cutsheetsv2\Prop26_47601 East Lyons Mill City Dr_Lyons.mxd
Print Date: 11/30/2016
Approved By: sotto
Produced By: GIS_Admin1
Project: 0612.01

Property 27
44711 Oregon 226 Lyons, Oregon

BASELINE SCORE
0

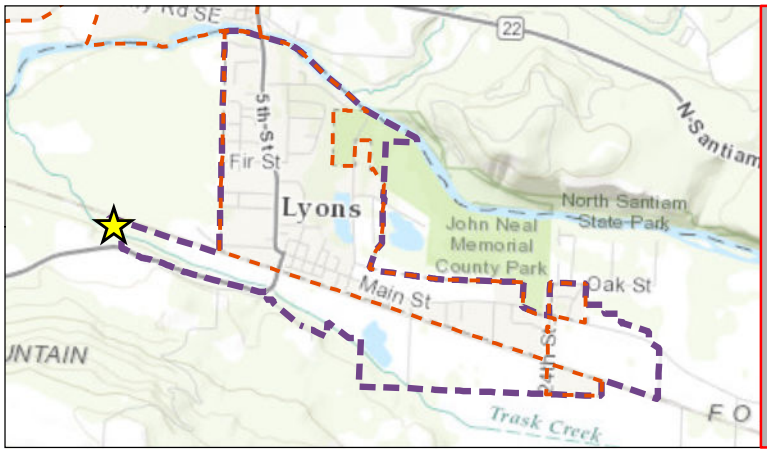
Baseline score generated from ranked variables. A higher score indicates the property is considered more desirable for development. Maximum value = 5.

Legend

- Identified Developable Parcel
- City Limits
- Urban Growth Boundary
- Tax Lot

0 75 150
Feet

Source: Aerial photograph and site location basemap obtained from Esri ArcGIS Online. Parcel boundaries and streets obtained from Marion and Linn Counties.



NO PHOTO AVAILABLE

Tax Lot ID	09S01E24 01101	**Typology**	Small Industrial
Acreage	1.27	**Status**	Undeveloped
Avg % Slope	1.51	**UGB**	Lyons
Property Class	Industrial Vacant	**City Limit**	N/A
Zoning	Industrial	**Storefront Appeal**	N/A
Land Value	$740	**Business Type**	Timber Industry
Improvement Value	$0	**Tourism**	No
Total Value	$740	**Site Configuration**	Poor
Utilization Ratio	0.00%	**Distance to I5 (mi)**	19.99
Brownfield	Non-Suspect	**Field Notes**	N/A

Land values per County assessor, 2016. I5 distance indicative and does not reflect driving distance.

Path: X:\0612.03 Business Oregon\Projects\Property Cutsheets\v2\Prop27_44711 Oregon 226_Lyons.mxd
Print Date: 11/30/2016
Approved By: sotto
Produced By: GIS_Admin1
Project: 0612.01

Property 28
1400 Douglas

Lyons, Oregon

BASELINE SCORE

0

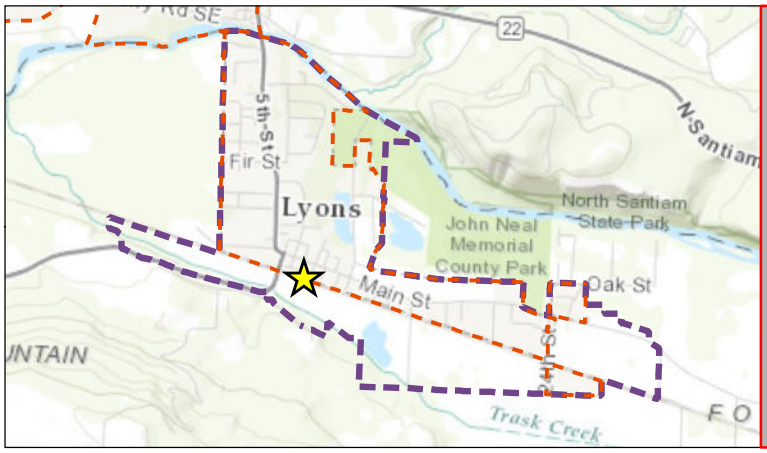
Baseline score generated from ranked variables. A higher score indicates the property is considered more desirable for development. Maximum value = 5.

Legend

- Identified Developable Parcel
- City Limits
- Urban Growth Boundary
- Tax Lot

0 125 250
Feet

Source: Aerial photograph and site location basemap obtained from Esri ArcGIS Online. Parcel boundaries and streets obtained from Marion and Linn Counties.



NO PHOTO AVAILABLE

Tax Lot ID	09S02E19C 00100
Acreage	3.90
Avg % Slope	0.77
Property Class	County Resp. Industrial, Land & B
Zoning	Industrial
Land Value	$0
Improvement Value	$0
Total Value	$0
Utilization Ratio	0.00%
Brownfield	Non-Suspect

Typology	Small Industrial
Status	Undeveloped
UGB	Lyons
City Limit	Lyons
Storefront Appeal	N/A
Business Type	Timber Industry
Tourism	No
Site Configuration	Good
Distance to I5 (mi)	20.77
Field Notes	N/A

Land values per County assessor, 2016. I5 distance indicative and does not reflect driving distance.

Path: X:\0612.03 Business Oregon\Projects\Property Cutsheets\v2\Prop28_1400 Douglas_Lyons.mxd
Print Date: 11/30/2016
Approved By: sotto
Produced By: GIS_Admin1
Project: 0612.01

Property 29
40070 Southwest 11th Avenue Mill City, Oregon

BASELINE SCORE

0

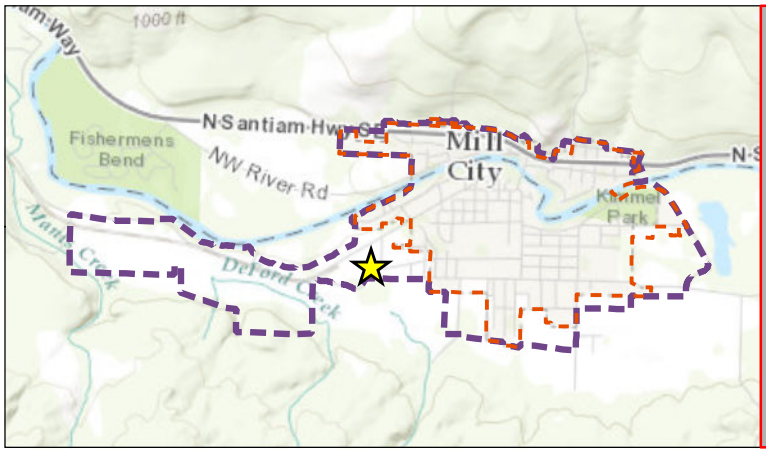
Baseline score generated from ranked variables. A higher score indicates the property is considered more desirable for development. Maximum value = 5.

Legend

- Identified Developable Parcel
- City Limits
- Urban Growth Boundary
- Tax Lot

0 50 100
Feet

Source: Aerial photograph and site location basemap obtained from Esri ArcGIS Online. Parcel boundaries and streets obtained from Marion and Linn Counties.



NO PHOTO AVAILABLE

Tax Lot ID	09S03E31BA00600
Acreage	2.65
Avg % Slope	1.86
Property Class	Tract with MFG Structure
Zoning	Industrial
Land Value	$89,920
Improvement Value	$380
Total Value	$90,300
Utilization Ratio	0.42%
Brownfield	Non-Suspect

Typology	Small Industrial
Status	Undeveloped
UGB	Mill City
City Limit	N/A
Storefront Appeal	N/A
Business Type	N/A
Tourism	No
Site Configuration	Good
Distance to I5 (mi)	26.97
Field Notes	N/A

Land values per County assessor, 2016. I5 distance indicative and does not reflect driving distance.

Path: X:\0612.03 Business Oregon\Projects\Property Cutsheets\v2\Prop29_40070 SW 11th Ave_Mill City.mxd
Print Date: 11/30/2016
Approved By: sotto
Produced By: jschane
Project: 0612.01

APPENDIX D

STAKEHOLDER INTERVIEWS

MEETING NOTES

Meeting Topic:	Study Area Stakeholder Interviews
Meeting Date & Time:	June 6, 2016
Project No.:	0612.03.01
Project Name:	North Santiam Canyon Regional Land Inventory
Meeting Location:	various
Recorded By:	Grant Herbert
Attendees:	Grant Herbert, MFA Peter Olsen, Keller

1. **City Representatives:**

Idanha: Mayor Yohe—2.5 years to go

Detroit: Debbie Ruyle, Sandy Franz (City Councilors), Bob Bruce, Christine Pavoni (city recorder)

Lyons: Richard, Darrell Ritchie (Public Works), Micki Valentine (city recorder)

Not present: Troy Donahue (mayor), Mike (Council)

Mill City: Thorin Thacker (mayor), Stacie Cook (city recorder), Russ Foltz (Public Works)

Gates: Jerry Marr (mayor), Gary Crumb, Greg Benthin (Public Works), Traci Archer (city recorder)

2. **What issues are your community's top priorities for economic and business development?**

Idanha:

No farming in the area; ice plant is only business. Green Veneer property (old mill) is a property of concern.

Detroit:

Business community growth very important.

Lyons:

N/A.

Mill City:

a. Want a more sustainable economy.
b. River is the lifeblood.

Gates:

a. Jobs
a. Community services

3. What types of industries and/or employers (businesses) are you seeking to attract to your community?

Idanha:

a. Would like an industrial employer for jobs, 12+ people. Housing is available for workers.
b. Possibly B&B, tourism. Camping, Pacific Crest Trail.
c. Mushrooms a possibility—morels, etc.

Detroit:

a. Tourism, hotel rooms "Outdoor Recreation Location."
b. Laundromat.
c. Restaurants, breweries and similar services to attract tourists/provide fun amenities.
d. Gas station (city has a Tesla Supercharger electric car charger unit).

Lyons:

Services: groceries, gas, barber/haircut, banks, healthcare

Mill City:

a. Tourism the goal—not much industrial land available.
b. Happy to adjust zoning for AirBnB, B&B, etc. Lack of lodging in the city, promoting small scale.
c. Jobs for kids—Subway, etc.
d. Support services for recreation, dinner spots (plenty of lunch places), brew pubs, 24-hour fitness.

Gates:

a. Restaurants, stores
b. Truck stop?

4. What types of industries are growing in the region?

Idanha:

None.

Detroit:

Tourism (kayak rental)

Lyons:

a. Wood products main employer. Freres' lumber (300–400 people). Will remain a strong company for some time. BUT outside the city limits (within UGB)—no taxes. Also, Conifer Canyon.

b. New bakery and car repair businesses in town.

Mill City:

Seven new businesses recently—online school, storage units, dollar general, chicken restaurant, Subway, catering business. Burger restaurant expanding. NRG Kayak.

5. What do you see are the greatest opportunities and constraints to growth and development in your community?

Idanha:

a. Need improved water distribution, roads, infrastructure, Internet expansion, cell coverage, electrical supply (power issues in winter), phone lines are bad, repair service slow. Radio service stops in Mill City.

b. Governance was a problem, now getting much better, gaining trust and producing something for the community.

Detroit:

a. Lack of sewer is a big problem for businesses, not being able to put in bathrooms, has affected potential businesses already. (Businesses currently using portable toilets)

b. Proposal for a bikeway from Estacada to Detroit—could be a big boost.

c. Lake levels have a big impact on tourism activity.

d. Skiing is important.

e. Business seasonality an issue.

f. Internet is good (fibre stops at Detroit).

g. Phone is good.

h. Only place for development is downtown.

i. Extending the season would be required—e.g., snowmobiling?

Lyons:

a. Urban development limit from septic requirements: 0.5 acre min. Average residential is 0.75 acres. Business currently use portable toilets.

b. Commercial/industrial unlikely due to septic requirements.

c. Commercial/industrial limited to a strip in downtown + along Main Street + Clipfell Lane + Front Street.

d. Main street mainly full.

e. Marijuana interests have approached city.

f. Trails—Canyon Journeys Trail Plan identified opportunities.

g. Lack of rental properties is a big problem.

Mill City:

a. Has a wastewater system and excellent water system.

b. But—experiencing more maintenance issues (new reservoir/old distribution for water, reverse for sewer).

c. Rails to Trails program to drive tourism.

d. Lack of worker rentals available.

e. No serviceable industrial land.

f. Lot size/lack of services has lost them small industrial opportunities in past.

Gates:

a. Power issues
b. No industrial users
c. Lack of sewer
d. No worker accommodation, no rentals, tight housing market—1 motel—6 rooms
e. No gas station
f. Fibre optic available
g. Is off the highway, no main street
h. ODOT issues getting signage on highway

6. What are the high-priority public improvements you are focused on making to your community?

Idanha:

N/A.

Detroit:

Community center improvements—big enough for events

Lyons:

a. Mehama community center
b. Street improvements (ODOT, fibre upgrade)

Mill City:

a. Cultural Arts Center.

b. Community Center.
c. Has museum, park facilities, further park developments planned.
d. Skatepark development.
e. Bridge refurbishment as part of Rails to Trails.
f. Highway 22 improvements.
g. Façade grants (Highway 22 area improvements).
h. New public works building planned.
i. Park development for boaters.
j. Improved signage to bring people into the city.

Gates:

a. Roads.
b. Public access to river (cliff is a problem). Parcel by bridge/fire station a possibility.
c. Facilities such as basketball court (currently 20' x 20').

7. What issues are most important to the citizens of your community?

Idanha:

a. Aging population.

b. No nearby school—nearest is Mill City K-12.

c. Medical—nearest is Stayton.

d. Public safety, volunteer fire dept shared with Detroit, lots of mental health/disability callouts. No ambulance, no police—Sheriff's dept + neighborhood watch.

Detroit:

a. Lack of medical, car repair, general services.

b. Want to keep the small-town feel and quietness; vacationers also like this.

c. Age of permanent residents a factor.

d. Transportation CART bus goes to Gates only. Highly dependent on cars—issue for aging population. May affect tourists getting here.

Lyons:

a. Jobs.
b. Activities for the kids to do.
c. CARTS public bus reducing service.
d. Affordability—nobody wants to pay more.
e. New developments unlikely to be interested, as have new system in place.

Mill City:

a. Cost—raising rates is not popular.

b. Nobody represents communities on both sides of the river; Linn Co. less involved than Marion Co.

Gates:

Resistance to property tax increases. No upfront money.

8. Are there properties you are aware of that are most suitable for redevelopment? What barriers do they face to redeveloping?

Idanha:

Green Veneer property, no barriers

Detroit:

a. Lakeside hotel (beautiful property, sewer issues)
b. Hardware store site

Lyons:

Old gas station on corner near city hall

Mill City:

a. Highway 22 property available
b. Old deer horn apartment site
c. Old Texaco (USTs removed 90s)—highly neglected at present

Gates:

Large property on Clark(?) Street available.

9. Data Availability

Idanha:

a. Zoning from COG.
b. Maps of wastewater, etc., from 1995—no additions since. Keller to scan paper maps and documents.
c. No electronic data that they are aware of.
d. No transportation plan.
e. First American Title made maps in 2015—zoning, parcels, looks like county/COG data.
f. City limit is Pacific Pride—commercial fueling only.
g. No aerials available (Linn County has none, either).
h. 1.7 million gallons/month of missing water—Feb 2016.
i. HBH Consulting doing work—Keller to contact.

Detroit:

a. Willamette COG for zoning.
b. Water management plan pdf.

c. Christine will try to request utilities data.
d. Forest service/COE for imagery?

Lyons:

a. Predominantly Linn County
b. Cascades West Council of Government
c. 1980 comp plan the latest

Mill City:

a. Not part of any Council of Government
b. Marion County + Linn County
c. Have an economic study (Dave Kinney)

Gates:

a. Tracey to email water meter addresses to MFA
b. Keller have some data as well

10. General Feel

Idanha:

a. Mixed feelings about putting sewer in community 50/50. Confident that could sway the vote to pro with education. Property value increase could be desirable. Currently paying $50-55/month water.
b. Mostly owner-occupied.
c. Improving relationships between Detroit and Idanha.

Detroit:

a. Mostly vacation homeowners, nice homes, expensive septic systems in place.
b. May be opposition, esp related to cost; residential less likely to be interested in sewer scheme.
c. Residents tend to be older, Social Security/fixed income. These are the voting community.
d. Water charged at base rate + consumption—something similar would work.

Lyons:

a. UGB contains a small part of Mehama.
b. Perception that resident income will not support new businesses.
c. Residents commute to jobs.
d. Grade school k-8 in Lyons, from 260 kids in 90s to 190 now.
e. Happy to be bedroom community.
f. Not a tourist town.

Mill City:

a. Very proactive.
b. A lot of planning for housing, etc.
c. Some fear of other cities connecting to Mill City wastewater—need to reassure public it can handle it, impact on employment for city + costs.
d. City not likely to want to give up sewer ownership easily.
e. Retirement and bedroom community.
f. Home sales have picked up—mostly people moving in.
g. Recreation is the selling point.

Gates:

a. Bedroom community—most people commute to Stayton/Mill City/Salem.
b. Mostly retired.
c. Handful of vacation homes.
d. City not really united, not really interested, resistance to extra costs. Not really asking for extra facilities, barely want to pay for what there is.
e. No real identity as a community, want to stay rural.
f. Bicycle path to tie communities together could be good.

11. Resources

Idanha:

Hill Family—Hills and Son trucking, Kevin Hills in Detroit, for community knowledge

Detroit:

N/A.

Lyons:

Bill Grimes (water district)—35 years.

Mill City:

N/A.

Gates:

N/A.


MARKET
Country Store
OPEN
ICED
• LATTES
• MOCHAS
ICE CREAM
ESPRESSO
Hand Made TRUFFLES