

Background Report

Clallam County Housing Needs Assessment

*Population, and Housing Profiles
of Clallam County, Forks,
Port Angeles, and Sequim*

Prepared by Pacific Development Concepts

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Introduction, Demographic and Housing Background Report, Clallam and Jefferson Counties

In spring of 1991, a group of private and public individuals from Jefferson and Clallam Counties and the State of Washington commissioned a comprehensive housing needs assessment to detail the demographic, economic, housing, and land use, conditions of these two counties, and each of the four incorporated cities, Forks, Port Angeles, Sequim, and Port Townsend.

They wished to use this information for many purposes including to:

- Assist private real estate professionals such as builders, bankers, realtors, and appraisers, have access to historic and current market information.
- Assist City and County planners and community groups to make decisions in ongoing local land use planning processes which take into account the need for all types of housing for a range of income groups.
- Assist social service and low income housing agencies and advocacy groups to make decisions about types of projects needed by low income people and to set goals and priorities for types of housing.
- To supply background data needed to justify applications for housing funding assistance from federal, state, and local sources.
- Explore special market conditions which exist in these areas such as housing conditions in Clallam Bay or those which exist on Indian reservations.

Data contained in this reference book were obtained from federal, state, and local sources, as well as from survey work. The data is presented in a format which allows update, using the same sources, most of which are periodically updated.

All the sources are readily available, and most are free or available at nominal cost.

This background report is presented as a reference manual which can be used to obtain data relevant to individual users. Users are welcome to copy materials and use them to serve their individual information and presentation requirements.

Information about how to get additional copies and related reports can be obtained from the Clallam Jefferson Community Action Agency:

Clallam County Office: 540 East 8th, Port Angeles, WA, 98362

Jefferson County Office, 802 Sheridan, 1st Floor, Port Townsend, WA 98368

West End Office: Forks Recreation Center, P.O. Box 1644, Forks, WA 98331.

**Population, Economic and
Housing Profile, Clallam County**

Population, Economic, and Housing Profile Clallam County

- The population of Clallam County has increased by 9% between 1980 and 1990. This was the slowest rate of growth for any decade since 1930-40. The population of the three incorporated areas has grown by 4% while the unincorporated area has grown by 14%.
- 57% of the population now live in cities, and 43% live in unincorporated areas.
- Consistent with the nationwide trend in decreasing household size, the average household size in Clallam County went from 2.54 in 1980 to 2.4 in 1990.
- In Clallam County, the Office of Financial Management estimates that almost half of the population increase came from natural increase (excess of births over deaths) and the balance came from net migration. This contrasts with Jefferson County where 14% of its population increase came from natural increase and the balance came from net migration.
- Clallam County is one of five counties in the State where persons age 65 years and older comprise one-fifth population or more. 9,026 persons or 28% of the population are over 65. The fastest growing age group in the County is the elderly over the age of 75, which increased by 34%. The number of people between the ages of 20 and 29 decreased by 13%, and the population 0-19 decreased by 2%, which were the only age groups to record a loss in their relative share of the overall population.
- The population of the County is becoming ethnically more diverse. African-Americans, Native Americans and Alaskan Natives, Asian and Pacific Islanders, and people of Hispanic origin all increased in number between 1980 and 1990. The population is still predominantly Caucasian at 93% and 7% minority.

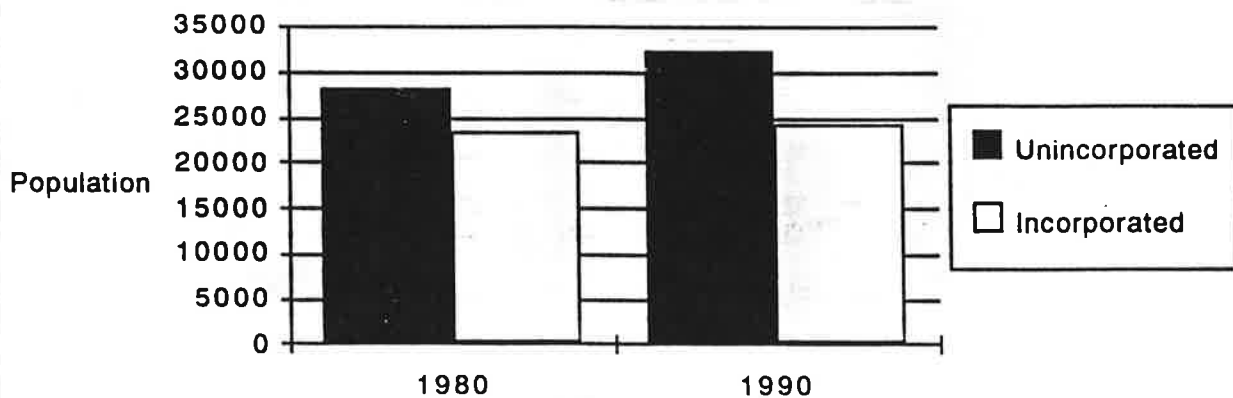
- Renter households in the County increased by 18% between 1980 and 1990, while owner households increased by 14% during that same period.
- Overall housing units increased by 3,842 units between 1980 and 1990. Only 876 of these units were built within City limits in Clallam County, the balance were added in unincorporated areas. Mobile home units increased by 43% between 1980 and 1990, compared with a 13% increase in single family units and an 15% increase in multi-family units. The County is primarily at single family density, 86% of all units are single family homes or mobile homes and 14% are multifamily.
- Of the mobile homes in Clallam County, 45% of the units are located in parks, with the balance located on individually platted lots. There are 76 parks in Clallam County. 20% of the mobile homes are estimated to be renter occupied.
- 20% of the housing stock is in poor to fair condition. (This does not include multi-family buildings larger than duplexes for which condition data was not available.)
- The median home value increased by 49% in the ten year period, from \$56,000 to \$83,431. At the same time, the amount of income required to purchase the average priced home rose from \$27,103 to \$32,968, an increase of 22%.
- In order to afford the 1990 average priced home of \$83,431 in Clallam County, a family must make 110% of the median income for a family of four. In Clallam County, the 1990 average priced single family housing was most affordable in Forks (average price \$45,175), in Port Angeles (average price \$69,195) and least affordable in Sequim (average price \$88,244)
- The rental housing stock is comprised approximately of 3,500 multifamily units and 2,752 mobile home and single family units.
- There were 483 assisted rental housing units in the County in 1980. That number has grown to 910 in 1990.

- Average rents vary by City and housing type as these examples of two bedroom rents for apartment and houses by City illustrate:

Forks	Apartment	\$275	House	\$350
Port Angeles		\$375		\$500
Sequim		\$388		\$475

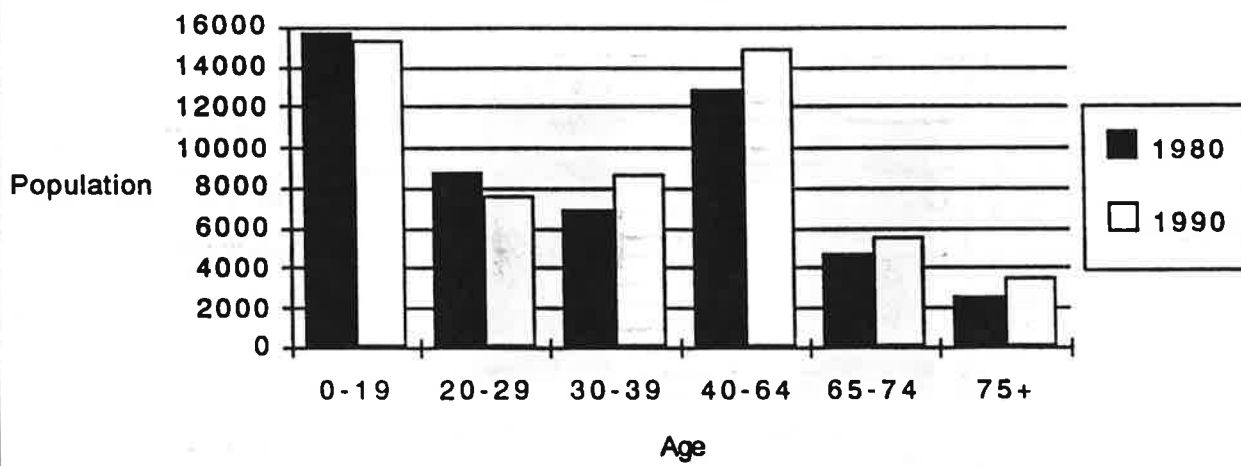
- Vacancies in every Clallam community are very low, at 0 to 1% in most rental housing types. The only type of availability is for leased land in mobile home parks and a tenant has to own their own mobile home and be able to afford moving and installation costs of a mobile home in these spaces. In all markets, rents are expected to increase. Forks has the tightest rental market with Sequim having some vacancies in single family homes renting for over \$700 a month.
- Families earning less than 50% of median cannot afford to rent an average priced 2 bedroom house in any Clallam rental market. (Based upon a definition of affordability which defines affordability as 30% of gross income for rent and utilities) Apartments are more affordable, but are still out of reach of many families who earn minimum wage, average wage, or fixed incomes from public sources.
- Household median income has increased by 40% to \$23,700 in 1990, while family median income (family of four) has increased by 52% to \$30,000.
- There are 73.9 recipients of public assistance per 1,000 Clallam County residents as compared with the State figure of 66.6 recipients per 1,000 population.
- The County's labor force has increased by 16%, and the percentage of unemployed persons in the total labor force has dropped from 13.6% in 1980 to 7.6% in 1990.
- The average income per job has risen by 26% over the last decade to \$17,745 in 1990.

**Clallam County Population Distribution
1980 vs. 1990**



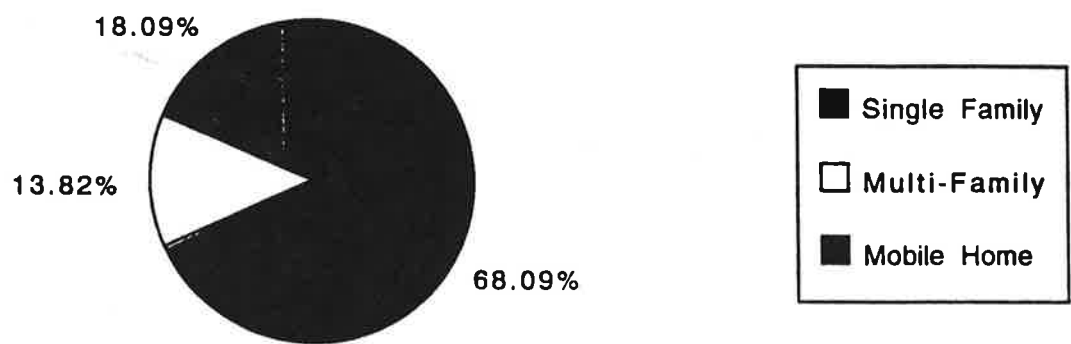
Source: Pacific Development Concepts/1980 Census/WA State OFM 1991

Clallam County Age Distribution 1980 vs. 1990



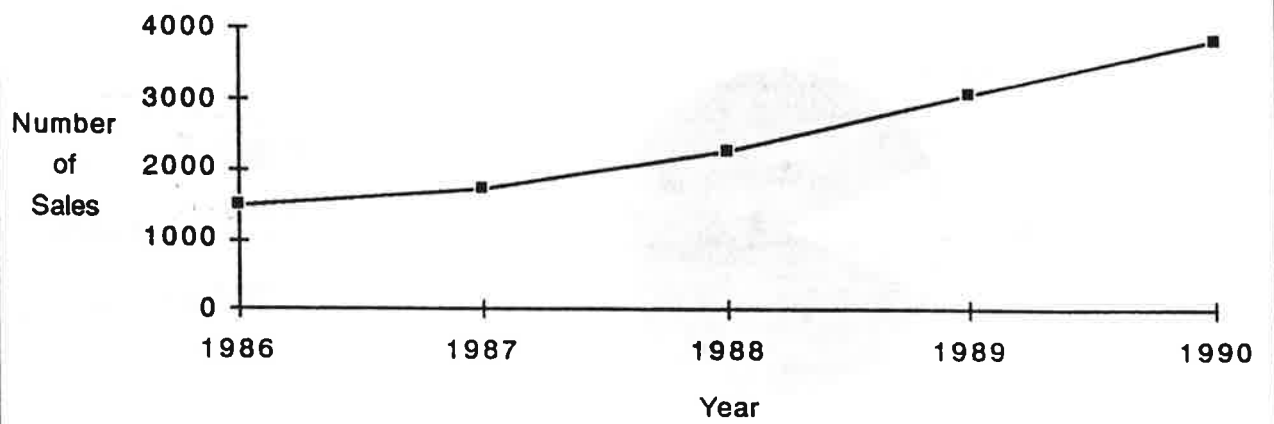
Source: Pacific Development Concepts/WA State OFM 1991

**Clallam County Housing Mix
1990**



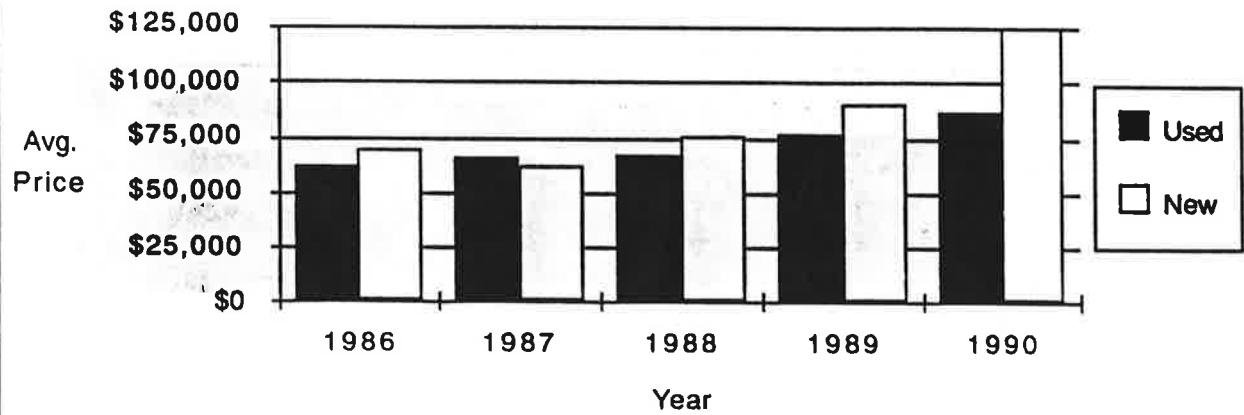
Source: Pacific Development Concepts/WA State OFM 1991

**Total Number of Real Estate Sales in
Clallam County 1986-1990**



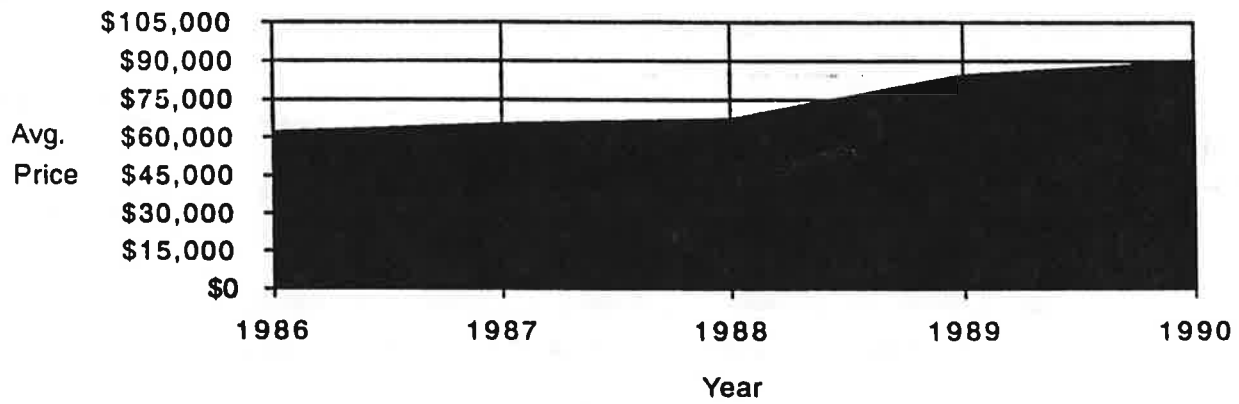
Source: Pacific Development Concepts/The Digest 1991

**Average New and Used Home Prices,
Clallam County 1986-1990**



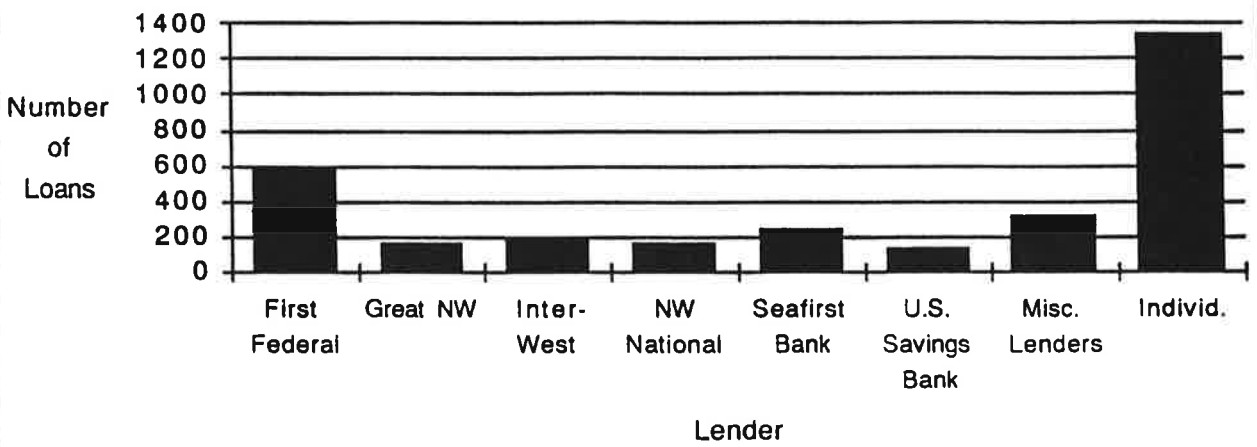
Source: Pacific Development Concepts/The Digest 1991

**Weighted Average Single Family Home Price
Clallam County 1986-1990**



Source: Pacific Development Concepts/The Digest 1991

**Most Active Clallam County Lenders
1990**



Source: Pacific Development Concepts/The Digest 1991



**SELECTED POPULATION, ECONOMIC, AND HOUSING DATA
JEFFERSON-CLALLAM HOUSING NEEDS STUDY, 1991**

CLALLAM COUNTY

Population and Households

Population	1980	1990	% Change
Unincorporated	28,264	32,235	14%
Incorporated	23,384	24,229	4%
Forks	3,060	2,902	-5%
Port Angeles	17,311	17,710	2%
Sequim	3,013	3,617	20%
Total	51,648	56,464	9%
Households	19,996	22,837	14%
Owner Households	14,131	16,674	18%
Renter Households	5,865	6,303	7%
Household Size	2.54	2.4	-6%
Age Distribution			
00-19	15,710	15,380	-2%
20-29	8,779	7,625	-13%
30-39	6,970	8,729	25%
40-64	12,877	14,962	16%
65-74	4,687	5,512	18%
75+	2,625	3,514	34%
Race			
White	48,674	52,509	8%
Black	114	321	182%
Indian, Eskimo & Aleut	2,113	2,695	28%
Asian and Pacific Islander	385	614	59%
Other	341	325	-5%
Hispanic Origin	671	1,150	71%

Housing Units

Unit Type	1980	1990	% Change
Total Units	21,851	25,693	18%
Single Family Units	15,501	17,495	13%
Multi-Family Units	3,094	3,551	15%
Mobile Home Units	3,256	4,647	43%

Assisted Units

Owner		263	
Renters	483	910	88%

Persons in

Group Quarters	819	1,639	100%
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Occupied Units	19,996	22,837	14%
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Vacant Units	1,399	2,388	71%
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Housing Condition and Valuation

Single Family Housing Condition	1980	1990	% Change
Low		835	
Fair		2,565	
Average		6,365	
Good		5,371	
Very Good		1,974	
Excellent		16	
Total		17,126	

School District

Assessed Value 000's	\$1,502,560	\$1,902,530	27%
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Owner Characteristics

	1980	1990	% Change
Owner Households	14,131	16,674	18%
Median Home Value	\$56,000	\$83,431	49%
Income Needed to Afford Average Home	\$27,103	\$32,968	22%

Renter Characteristics

	1980	1990	% Change
Renter Households	5,865	6,303	7%
Median Contract Rent	\$196		
Rental Vacancy Rate	7.3		
Income Needed to Afford Average Rent	\$9,840		

Income Characteristics

	1980	1990	% Change
Household Income			
> \$5,000	2,252	Available 1990	
\$5,000 to \$7,499	1,691	Census-Summer	
\$7,500 to \$9,999	1,544	1993	
\$10,000 to \$14,999	3,391		
\$15,000 to \$19,999	2,799		
\$20,000 to \$24,999	2,806		
\$25,000 to \$34,999	3,171		
\$35,000 to \$49,999	1,475		
\$50,000 or more	770		
Household Median	\$16,890	\$23,700	40%
Family Median	\$19,796	\$30,000	52%
30% of Median	\$5,939	\$9,000	52%
50% of Median	\$9,898	\$15,000	52%
80% of Median	\$15,837	\$24,000	52%
Public Assistance			
P. A./Clallam County			
Recipients		3,154	
Recipients per 1000		73.9	
State Recipients		310,507	
Recipients per 1000		66.6	

Labor Characteristics

	1980	1990	% Change
Total Labor Force	21,100	24,430	16%
Employed	18,230	22,570	24%
Unemployed	2,880	1,860	-35%
Unemployment Rate	13.6	7.6	
Per Capita Income	\$9,402	\$14,142	50%
Avg Income Per Job	\$14,082	\$17,745	26%

Homeless

	1980	1990	% Change
Homeless Individuals		1,443	
Bednights Provided		11,519	
Turnaways		137	

Note: The data presented for 1980 and 1990 are derived from a number of sources and from slightly different time-frames. The data presented is the most recent data available in March, 1991. As 1990 Census Data becomes available, and other sources are updated by the State, the data can be readily updated.

JEFFERSON-CLALLAM HOUSING NEEDS STUDY, 1991

CLALLAM COUNTY

1980 Census		1990 Forecast		1995 Forecast		2000 Forecast	
Age	Total	Male	Female	Age	Total	Male	Female
0-4	4008	2038	1970	0-4	4014	2048	1968
5-9	3844	1918	1926	5-9	4078	2097	1983
10-14	3862	1956	1907	10-14	4031	2028	1984
15-19	4195	2121	2074	15-19	4013	2028	1964
20-24	4424	2228	2204	20-24	3213	1684	1529
25-29	4537	2310	2227	25-29	3482	1801	1681
30-34	3996	2104	1892	30-34	3748	2025	1724
35-39	2974	1488	1486	35-39	4125	2108	2118
40-44	2385	1241	1144	40-44	4651	2435	2305
45-49	2209	1053	1156	45-49	4424	2119	2305
50-54	2495	1222	1273	50-54	4283	2153	2130
55-59	2923	1540	1383	55-59	3462	1807	1655
60-64	2965	1422	1543	60-64	3045	1511	1534
65-69	2774	1359	1415	65-69	2782	1387	1387
70-74	1913	893	1020	70-74	2080	1107	1101
75-79	1328	614	714	75-79	1237	543	694
80-84	739	301	438	80-84	1054	325	729
85+	658	182	476	85+	807	229	578
Total	51648	26743	25905	Total	69886	28847	29738
Median	31.87	30.68	32.76	Median	39.308	38.218	40.428

Note: The WA State OFM will prepare new population projections in late summer 1991 using U.S. Census STF 2 data (projected to be available in August). These projections will be used to meet State growth planning population projection requirements.

Source: WA State OFM, State and County Populations by Age and Sex, 1980-2000, August 1989

**AFFORDABILITY ANALYSIS
JEFFERSON-CLALLAM HOUSING NEEDS STUDY, 1991**

CLALLAM COUNTY

Homeowner Affordability

Underlying Assumptions:

- (1) Median home value is \$83,431.
- (2) Income needed to afford average home is \$32,968.*
- (3) Percentage of median income necessary to afford average home is 110%.

	<u>1990</u>	<u>Income (Gap) or Surplus to Afford Average Home</u>
Family Median Income	\$30,000	(\$2,968)
80% of Median Income	\$24,000	(\$8,968)
50% of Median Income	\$15,000	(\$17,968)

* Based on 10/90 loan to value ratio, 360 periods, 9.91% interest rate, 13% of value for taxes and \$250/year for insurance all equaling 28% of gross income.

Summary of Clallam County Real Estate Sales By Area and Land Use 1986-1990
 Source: Pacific Development Concepts/The Digest 1991

1986

Type of Property	Sequim		P. Angeles		Forks		Other		Total	
	#	\$	#	\$	#	\$	#	\$	#	\$
Used Single Family on 5 Acres or Less	56	3,155,037	275	14,379,471	41	218,189	297	20,503,454	669	40,219,854
Used Single Family on More than 5 Acre	1	162,500	0	0	0	0	39	4,016,623	40	4,179,123
New Single Family	1	70,000	22	1,394,962	0	0	6	533,700	29	1,998,662
Multi Unit Residential	6	894,450	16	1,405,100	4	375,000	2	253,000	28	2,927,550
Commercial or Industrial	11	3,534,170	23	5,112,457	6	678,181	29	7,263,750	69	18,588,558
Condominiums-Residential & Moorage	14	816,300	1	175,000	0	0	13	1,582,000	28	2,573,300
Land with Mobile Home	5	144,000	2	38,000	4	89,402	71	2,857,513	82	2,928,915
Land Only Platted Lots Some Incl. Mitpl	18	345,000	40	635,050	4	35,500	125	2,170,471	187	3,188,021
Land Only Short Plats	25	618,850	11	381,700	6	57,900	100	2,146,164	142	3,182,614
Land Only Unplatted Tracts	19	914,000	1	45,000	2	80,000	186	12,203,859	208	13,242,859
Reports Incomplete or Not Available	1	54,000	4	38,500	2	51,500	14	329,875	21	473,875
TOTALS FOR PERIOD	157	10,706,307	395	23,585,240	69	3,549,175	882	53,860,409	1,503	91,501,131
Average Price Used Single Family 5 Ac Or Less		56,340		52,288		53,212		69,035		80,119
Average Price New Single Family any acreage		70,000		63,407		0		88,950		88,919

1987

Type of Property	Sequim		P. Angeles		Forks		Other		Total	
	#	\$	#	\$	#	\$	#	\$	#	\$
Used Single Family on 5 Acres or Less	72	4,203,578	283	18,430,883	34	151,881	355	24,834,007	744	48,985,082
Used Single Family on More than 5 Acre	3	259,500	1	54,000	0	0	60	5,831,212	64	5,944,712
New Single Family	8	547,000	21	1,224,778	0	0	8	548,650	37	2,320,428
Multi Unit Residential	7	832,860	7	1,149,500	4	344,000	9	698,885	27	3,025,345
Commercial or Industrial	7	1,987,985	25	5,019,428	7	490,000	18	2,276,530	55	9,773,943
Condominiums-Residential & Moorage	12	872,250	2	264,500	0	0	7	707,700	21	1,844,450
Land with Mobile Home	8	315,375	0	0	8	150,884	104	4,002,889	118	4,468,948
Land Only Platted Lots Some Incl. Mitpl	7	90,300	47	932,378	4	34,000	160	3,148,145	218	4,202,821
Land Only Short Plats	43	1,281,050	9	187,500	5	64,500	139	2,709,420	196	4,202,470
Land Only Unplatted Tracts	12	883,400	3	50,500	2	30,350	213	7,258,317	230	8,202,567
Reports Incomplete or Not Available	1	38,250	0	0	0	0	1	10,000	2	48,250
TOTALS FOR PERIOD	180	11,071,648	398	25,293,285	62	2,830,350	1072	51,823,755	1,712	90,819,016
Average Price Used Single Family 5 Ac Or Less		58,383		58,059		44,812		69,955		63,152
Average Price New Single Family any acreage		88,375		58,323		0		68,581		82,714

1988

Type of Property	Sequim		P. Angeles		Forks		Other		Total	
	#	\$	#	\$	#	\$	#	\$	#	\$
Used Single Family on 5 Acres or Less	88	5,586,423	353	18,825,820	48	2,370,014	407	31,119,149	896	57,901,406
Used Single Family on More than 5 Acre	3	352,000	0	0	0	0	72	7,177,041	75	7,529,041
New Single Family	8	784,921	28	1,764,977	0	0	12	1,085,090	48	3,634,988
Multi Unit Residential	4	579,750	21	3,139,400	1	30,000	10	788,958	36	4,538,108
Commercial or Industrial	19	2,317,950	31	6,789,184	13	2,420,072	32	80,301,170	95	91,828,356
Condominiums-Residential & Moorage	13	667,631	6	720,225	0	0	17	1,926,900	36	3,314,756
Land with Mobile Home	16	710,100	4	59,500	8	208,225	105	4,325,031	133	5,300,858
Land Only Platted Lots Some Incl. Mitpl	26	359,850	92	1,887,531	3	42,990	246	3,786,878	367	5,858,848
Land Only Short Plats	59	2,093,750	12	470,000	2	52,962	149	2,867,930	222	5,484,642
Land Only Unplatted Tracts	16	1,201,683	2	215,500	5	61,950	338	17,706,412	361	19,185,545
Reports Incomplete or Not Available	0	0	1	41,500	0	0	2	100,000	3	141,500
TOTALS FOR PERIOD	252	14,853,858	550	33,893,817	80	5,184,213	1390	151,184,359	2,272	204,716,047
Average Price Used Single Family 5 Ac Or Less		63,482		53,331		49,375		76,460		64,622
Average Price New Single Family any acreage		98,115		63,035		0		90,424		75,729

1989

Type of Property	Sequim		P. Angeles		Forks		Other		Total	
	#	\$	#	\$	#	\$	#	\$	#	\$
Used Single Family on 5 Acres or Less	92	6,637,742	379	22,604,782	49	223,1027	479	40,422,690	999	71,896,241
Used Single Family on More than 5 Acre	8	2,110,500	2	253,500	2	189,500	83	9,793,030	95	12,346,530
New Single Family	14	1,250,752	27	1,840,581	0	0	34	3,734,324	75	6,825,657
Multi Unit Residential	8	799,000	30	3,828,988	1	47,500	15	1,708,900	54	8,382,388
Commercial or Industrial	15	2,027,113	35	6,542,646	6	115,2000	26	10,844,055	82	20,565,814
Condominiums-Residential & Moorage	12	737,950	1	130,000	0	0	22	2,026,532	35	2,894,482
Land with Mobile Home	11	535,445	5	152,500	2	47,500	134	5,771,451	152	6,508,896
Land Only Platted Lots Some Incl. Mitpl	48	918,950	102	2,191,544	5	32,415	419	9,062,023	574	12,204,932
Land Only Short Plats	92	3,642,316	12	369,850	2	17,500	299	6,818,917	405	10,848,383
Land Only Unplatted Tracts	33	1,298,550	6	384,500	5	134,450	555	43,148,229	599	44,848,729
Reports Incomplete or Not Available	0	0	0	0	0	0	4	408,502	4	408,502
TOTALS FOR PERIOD	333	19,959,318	599	38,278,691	72	3,851,892	2070	133,738,653	3,074	195,828,554
Average Price Used Single Family 5 Ac Or Less		72,149		59,843		45,531		84,390		71,968
Average Price New Single Family any acreage		89,339		88,170		0		109,833		91,009

1990

Type of Property	Sequim		P. Angeles		Forks		Other		Total	
	#	\$	#	\$	#	\$	#	\$	#	\$
Used Single Family on 5 Acres or Less	84	7,412,501	432	29,892,416	53	239,4287	445	44,899,449	1014	84,598,853
Used Single Family on More than 5 Acre	2	598,000	0	0	1	40,000	71	9,668,855	74	10,307,855
New Single Family	28	2,882,298	28	2,118,118	0	0	47	7,818,077	101	12,814,489
Multi Unit Residential	11	1,442,000	33	5,027,550	1	50,000	15	2,029,000	60	8,548,550
Commercial or Industrial	38	6,568,028	63	9,191,931	5	508,000	47	8,008,050	153	24,274,008
Condominiums-Residential & Moorage	23	1,958,700	1	143,000	0	0	30	5,072,989	54	7,175,889
Land with Mobile Home	18	1,120,500	4	138,000	8	230,500	131	7,339,189	161	8,828,189
Land Only Platted Lots Some Incl. Mitpl	69	2,012,048	102	2,190,550	5	46,500	608	16,052,942	784	20,302,038
Land Only Short Plats	78	4,483,050	15	345,850	10	129,500	538	15,533,622	639	20,492,122
Land Only Unplatted Tracts	38	2,454,935	3	93,420	11	322,200	770	45,174,108	822	48,044,683
Reports Incomplete or Not Available	2	303,000	0	0	0	0	1	43,000	3	346,000
TOTALS FOR PERIOD	389	31,238,058	681	49,138,933	84	3,718,887	2701	161,438,281	3,865	245,530,257
Average Price Used Single Family 5 Ac Or Less		88,244		89,185		45,175		100,898		83,431
Average Price New Single Family any acreage		110,858		75,576		0		162,044		124,898

**Population, Economic and
Housing Profile, Forks**

Population, Economic, and Housing Profile Forks

- Forks population decreased 6% over the last ten years and housing units have increased by a mere 2%. This is in sharp contrast to population increase in the previous decade which increased 130% from 1,328 to 3,060.
- As in most U.S. communities, average household size has decreased. In Forks, household size has decreased from 2.79 persons to 2.68 persons.
- 77% of Forks housing stock is comprised primarily of single family or mobile home units.
- 27% of the housing stock is in fair or poor condition.
- The assessed valuation of property for the Forks School District declined by 22% over the ten year period.
- Median home value declined 10% over ten years, and Forks was the only community in Clallam County where the income needed to afford an average home in 1990 is less than was needed in 1980.
- There are 93.5 recipients per 1,000 public assistance recipients in Forks as compared with 73.5 for Clallam County and 66.6 recipients per 1,000 statewide.
- 64 units of assisted housing have been built in Forks over the past ten years.
- The composition of the rental housing stock is 270 multifamily units and the balance of rental units are provided by single family homes and mobile homes.
- Vacancy rates for all rental housing types (single family houses, duplex and fourplex units, and apartments), are negligible based upon units available for rent in March of 1991. Only mobile home parks with leased spaces for rent have significant vacancies.
- No new rental housing construction has taken place since 1980 or is planned for the near future. Many rental homes have sold

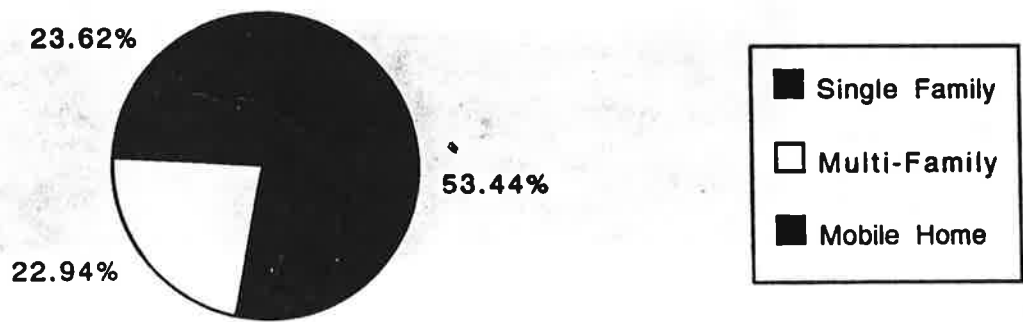
and are becoming owner occupied. A waiting list exists for 2-3 bedroom homes in the \$350-\$450 range. In spite of local economic conditions, upward pressure on rents is expected.

- Average rents for single family homes are between 7% and 21% higher depending upon unit size than rents for duplex, fourplex, or apartment units.
- The average monthly rent for two bedroom units in each of the rental unit types are as follows:

Single family house	\$350
Duplex/fourplex	\$325
Apartment	\$275

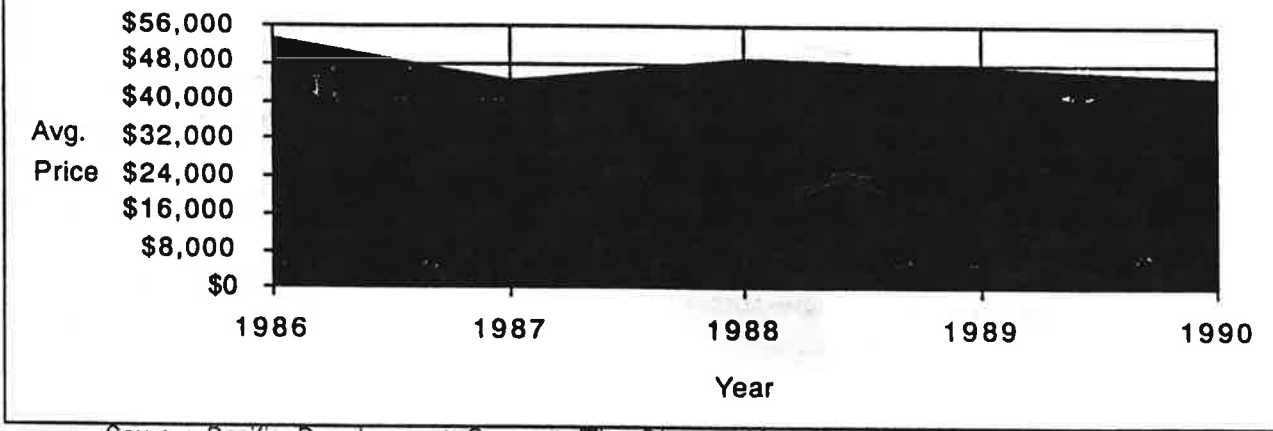
- Mobile home space rentals average \$85 for single wide and \$100 for double wide mobile homes. Availability of mobile home space rental is good.
- While the rents in Forks are the most affordable in Clallam County, rental affordability is still a problem for very low income individuals and families. At current rents, housing affordability (assuming that affordability is measured by the federal standard of 30% of monthly income for rent and utilities) a four person household at the poverty level, households earning minimum wage, and any household earning less than 50% of median or less cannot afford to rent a house in Forks. Apartments are more affordable, but often are not available and unless subsidized, are not affordable to any family earning less than 43% of median income, single head of household minimum wage earners, welfare recipients and others.
- A family must earn 61% of median income or more to afford the average priced home in Forks. Forks is the most affordable ownership market in Clallam County. The average priced home in Forks is 53% more affordable than Port Angeles and 95% more affordable than Sequim. For that reason, Forks is attracting retired buyers, California buyers, and vacation home buyers who compete with local renters for housing. If households have the down payment, families can often afford to buy for the same price it costs to rent, further effecting the supply of houses offered for rent.

**Forks Housing Mix
1990**



Source: Pacific Development Concepts/WA State OFM 1991

**Weighted Average Single Family Home Price
Forks 1986-1990**



Source: Pacific Development Concepts/The Digest 1991

**SELECTED POPULATION, ECONOMIC, AND HOUSING DATA
JEFFERSON-CLALLAM HOUSING NEEDS STUDY, 1991**

FORKS

Population and Households

Population	1980	1990	% Change
Unincorporated	28,264	32,235	14%
Incorporated	23,384	24,229	4%
Forks	3,060	2,862	-6%
Sequim	3,013	3,617	20%
Port Angeles	17,311	17,710	2%
Total	51,648	56,464	9%
 Households	 1,095	 976	 -11%
Owner Households	684	Available 1990	
Renter Households	411	Census 8/91	
 Household Size	 2.79	 2.68	 -4%
 Age Distribution			
00-19	1,168	Available 1990	
20-29	730	Census 8/91	
30-39	502		
40-64	515		
65-74	98		
75+	47		
 Race			
White	2,870	2,487	-13%
Black	1	64	6300%
Indian, Eskimo & Aleut	101	147	46%
Asian and Pacific Islander	46	50	9%
Other	42	114	171%
Hispanic Origin	36	197	447%

Housing Units

Unit Type	1980	1990	% Change
Total Units	1,158	1,177	2%
Single Family Units	697	629	-10%
Multi-Family Units	226	270	19%
Mobile Home Units	235	278	18%

Assisted Units

Renters:

Family	64
Elderly	0

Persons in

Group Quarters	0	283
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Occupied Units	1,095	976	-11%
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Vacant Units	60	82	37%
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Housing Condition and Valuation

Single Family Housing Condition	1980	1990	% Change
Low		60	
Fair		147	
Average		351	
Good		207	
Very Good		14	
Excellent		0	
Total		779	

School District

Assessed Value 000's	\$186,944	\$145,679	-22%
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Owner Characteristics

	1980	1990	% Change
Owner Households	684	Available 1990 Census 8/91	
Median Home Value	\$50,400	\$45,175	-10%
Income Needed to Afford Average Home	\$24,482	\$18,260	-25%

Renter Characteristics

	1980	1990	% Change
Renter Households	411	Available 1990 Census 8/91	
Median Contract Rent	\$211		
Rental Vacancy Rate	7.4		
Income Needed to Afford Average Rent	\$10,440		

Income Characteristics

	1980	1990	% Change
Household Income			
> \$5,000	106	Available 1990	
\$5,000 to \$7,499	67	Census Summer	
\$7,500 to \$9,999	56	1993	
\$10,000 to \$14,999	228		
\$15,000 to \$19,999	148		
\$20,000 to \$24,999	207		
\$25,000 to \$34,999	160		
\$35,000 to \$49,999	80		
\$50,000 or more	64		

Household Median	\$16,890	\$23,700	40%
Family Median	\$19,796	\$30,000	52%
30% of Median	\$5,939	\$9,000	52%
50% of Median	\$9,898	\$15,000	52%
80% of Median	\$15,837	\$24,000	52%

Public Assistance

Forks/Clallam Recipients	1,112
Recipients per 1000	93.5
State Recipients	310,507
Recipients per 1000	66.6

Labor Characteristics

	1980	1990	% Change
Total Labor Force	21,100	24,430	16%
Employed	18,230	22,570	24%
Unemployed	2,880	1,860	-35%
Unemployment Rate	13.6	7.6	
Per Capita Income	\$9,402	\$14,142	50%
Avg Income Per Job	\$14,082	\$17,745	26%

Homeless

	1980	1990	% Change
Homeless Individuals		1,443	
Bednights Provided		11,519	
Turnaways		137	

Note 1: The data presented for 1980 and 1990 are derived from a number of sources and from slightly different time-frames. The data presented is the most recent data available in March, 1991. As 1990 Census Data becomes available, and other sources are updated by the State, the data can be readily updated.

Note 2: The shaded regions represent data which is presented at the County-wide level.

**AFFORDABILITY ANALYSIS
JEFFERSON-CLALLAM HOUSING NEEDS STUDY, 1991**

FORKS

Homeowner Affordability

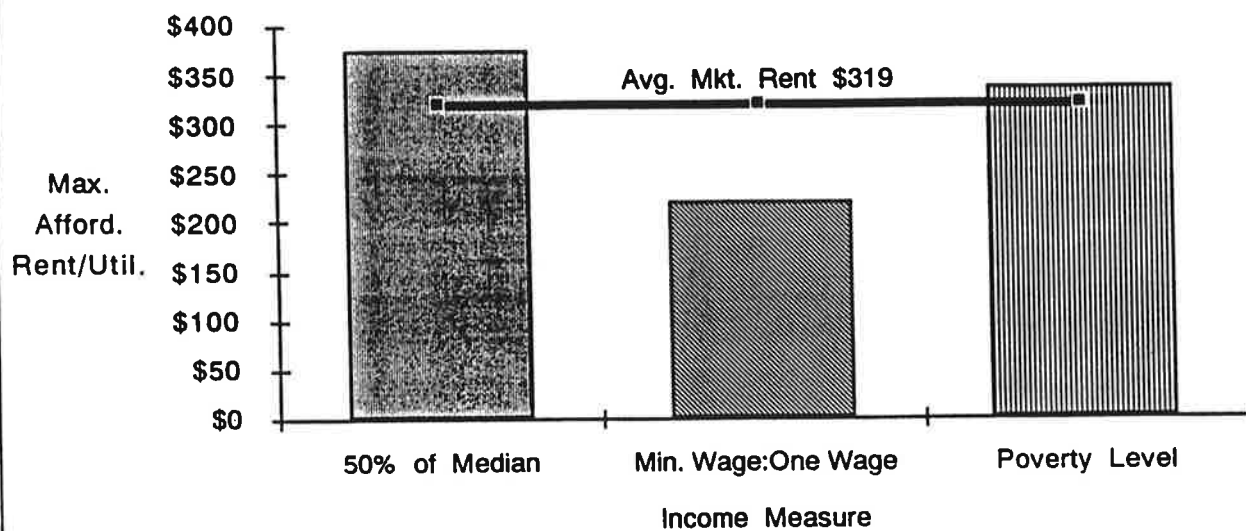
Underlying Assumptions:

- (1) Median home value is \$45,175.
- (2) Income needed to afford average home is \$18,260.*
- (3) Percentage of median income necessary to afford average home is 61%.

	<u>1990</u>	<u>Income (Gap) or Surplus to Afford Average Home</u>
Family Median Income	\$30,000	\$11,740
80% of Median Income	\$24,000	\$5,740
50% of Median Income	\$15,000	(\$3,260)

* Based on 10/90 loan to value ratio, 360 periods, 9.91% interest rate, 13% of value for taxes and \$250/year for insurance all equaling 28% of gross income.

Forks-Affordability of 2-Bedroom Apartment Family of Four, Rent+Utilities, 1991



Source: Pacific Development Concepts

**AFFORDABILITY ANALYSIS
JEFFERSON-CLALLAM HOUSING NEEDS STUDY, 1991**

FORKS

Affordability of Average Rent for a 2-Bedroom Apartment
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Underlying Assumptions:

- (1) Federal affordability standard: rent + utilities = 30% of gross income.
- (2) Based upon family of four.
- (3) Average rent for 2-bedroom apartment is \$275.
- (4) Average utility/service allowance is \$44.
- (5) Average rent + utilities is \$319.

<u>Income Measure</u>	<u>Annual Income</u>	<u>Max. Affordable Rent + Utilities @30% of Gross</u>	<u>Income (Gap) or Surplus to Afford Avg. Rent/Mo.</u>	<u>% of Income Needed to Afford Avg. Rent</u>
Poverty	\$13,400	\$335	\$16	29%
Minimum Wage:				
One Wage	\$8,840	\$221	(\$98)	43%
Two Wage	\$17,680	\$442	\$123	22%
Average Wage:				
One Wage	\$17,784	\$445	\$126	22%
Two Wage	\$35,568	\$889	\$570	11%
50% of Median	\$15,000	\$375	\$56	26%
Median	\$30,000	\$750	\$431	13%

**AFFORDABILITY ANALYSIS
JEFFERSON-CLALLAM HOUSING NEEDS STUDY, 1991**

FORKS

Affordability of Average Rent for a 2-Bedroom House

Underlying Assumptions:

- (1) Federal affordability standard: rent + utilities = 30% of gross income.
- (2) Based upon family of four.
- (3) Average rent for 2-bedroom house is \$350.
- (4) Average utility/service allowance is \$82.
- (5) Average rent + utilities is \$432.

<u>Income Measure</u>	<u>Annual Income</u>	<u>Max. Affordable Rent + Utilities @30% of Gross</u>	<u>Income (Gap) or Surplus to Afford Avg. Rent/Mo.</u>	<u>% of Income Needed to Afford Avg. Rent</u>
Poverty	\$13,400	\$335	(\$97)	39%
Minimum Wage:				
One Wage	\$8,840	\$221	(\$211)	59%
Two Wage	\$17,680	\$442	\$10	29%
Average Wage:				
One Wage	\$17,784	\$445	\$13	29%
Two Wage	\$35,568	\$889	\$457	15%
50% of Median	\$15,000	\$375	(\$57)	35%
Median	\$30,000	\$750	\$318	17%

**RENTAL HOUSING SUMMARY
JEFFERSON-CLALLAM HOUSING NEEDS STUDY, 1991**

FORKS AREA

Rental Housing Composition

<u>Housing Type</u>	<u>No. of Units*</u>	<u>% of Total</u>
Multi-Family	270	66%
Single Family- and Mobile Home	141	34%

*Based on 1980 Census figures.

Single Family Residence Rents and Vacancies

<u>Number of Bedrooms</u>	<u>1991 Rent Range*</u>	<u>Average Rent</u>	<u>% Vacant</u>
1 Bedroom	None Available		
2 Bedroom	\$285-\$400	\$350	0%
3 Bedroom	\$350-\$475	\$450	0%
4 Bedroom	\$400-\$575	\$550	0%

*1991 rent figures represent actual current effective rents in March and April 1991.

Note: Expect continued upward pressure on rents. Several rental homes have sold during the last year which further contributed to the rental shortage.

Duplex to Fourplex Rents and Vacancies

<u>Number of Bedrooms</u>	<u>1991 Rent Range*</u>	<u>Average Rent</u>	<u>% Vacant</u>
1 Bedroom	None Available		
2 Bedroom	\$295-\$365	\$325	0%
3 Bedroom	None Available		
4 Bedroom	None Available		

*1991 rent figures represent actual current effective rents in March and April 1991.

Note: Approximately 30 duplexes are currently available as rentals in the Forks area.

Apartment Rents and Vacancies

<u>Number of Bedrooms</u>	<u>1991 Rent Range*</u>	<u>Average Rent</u>	<u>% Vacant</u>
1 Bedroom	\$200-\$250	\$225	0-1%
2 Bedroom	\$250-\$350	\$275	2%
3 Bedroom	\$315-\$325	\$325	0%
4 Bedroom	None Available		

*1991 rent figures represent actual current effective rents in March and April 1991.

Note: Approximately 160 apartment units are available in the Forks area. A modest vacancy exists in 2-bedroom, non-subsidized units as the Timberline apartments are in foreclosure and the Calawah apartments are in poor condition. No new apartment construction is anticipated in 1991. Expect some modest upward pressure on asking rents through 1991.

Mobile Home Park-Leased Space, Rents and Vacancies

Type of Space	1991 Rent Range*	Average Rent	% Vacant
Single Wide	\$85-\$100	\$85	30%
Double Wide	\$100	\$100	30%
RV	None Available		

*1991 rent figures represent actual current effective rents in March and April 1991.

Note: Limited demand exists for the leased parks in the area. Mobile home parks tend to attract transitory tenants in Forks. Elk Creek has 40 vacant spaces. Alder Grove has 37 vacant spaces and the Forks Mobile Home Park has 7 vacant spaces. Park owners report strong demand for mobile homes inside the parks as rentals. Rents range from \$225 for one bedroom units, \$250-\$300 for 2-bedroom units, and \$375-\$400 for 3-bedroom units. No mobile home developments are planned for the near future.

Summary Comments

Shortages are evident in most property types as no new construction has taken place since 1980. Many rental homes have sold and are becoming owner occupied. A waiting list exists for 2-3 bedroom homes in the \$350-\$450 range. Anticipate upward pressure on rents. There are some reports of people staying in vehicles waiting for housing.

Source: Russ Mellon, Rent Survey 4/91, Pacific Development Concepts.

**Population, Economic and
Housing Profile, Port Angeles**

Population, Economic, and Housing Profile Port Angeles

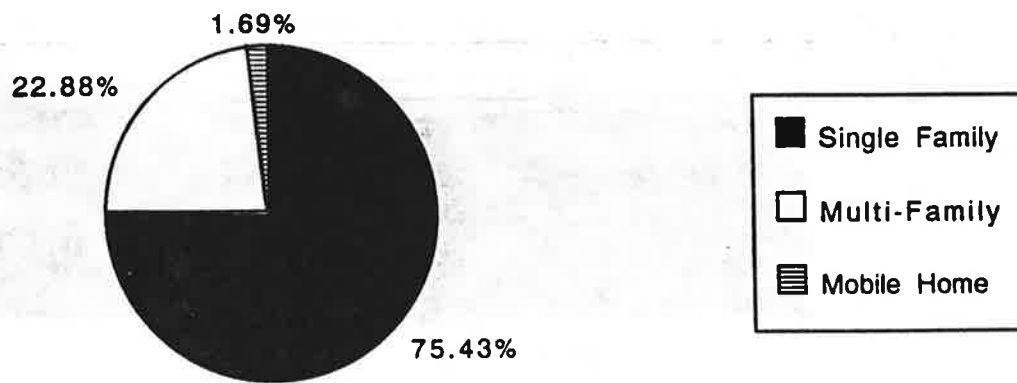
- The population of Port Angeles has increased by 2% between 1980 and 1990 as contrasted with a growth rate of 5.77% in the decade before.
- Consistent with the nationwide trend in decreasing household size, the average household size in Clallam County went from 2.42 in 1980 to 2.34 in 1990.
- The population of Port Angeles is becoming ethnically more diverse. African-Americans, Native Americans and Alaskan Natives, Asian and Pacific Islanders, and people of Hispanic origin all increased in number between 1980 and 1990. The population is still predominantly Caucasian at 95% and 5% minority.
- Overall housing units increased by 575 units between 1980 and 1990. Mobile home units increased by 23% between 1980 and 1990, compared with a 6% increase in single family units and an 12% increase in multi-family units. The City is primarily at single family density, 77% of all units are single family homes or mobile homes and 23% are multifamily units.
- 16% of the housing stock is in poor to fair condition. (This does not include multi-family buildings larger than duplexes for which condition data was not available.)
- The median home value increased by 34% (as compared to 49% for the County) in the ten year period, from \$51,600 to \$69,195. At the same time, the amount of income required to purchase the average priced home rose from \$25,043 to \$27,495, an increase of 10%.
- In order to afford the 1990 average priced home of \$69,195 in Port Angeles, a family must make 92% of the median income for a family of four.

- The rental housing stock is comprised approximately of 1,601 multifamily units and 1,055 mobile home and single family units.
- There were 483 assisted rental housing units in the County in 1980. That number has grown to 910 in 1990.
- Average rents vary by housing type as these examples of two bedroom rents for apartments and houses illustrate:

Apartment	\$375
Duplex, Fourplex	\$400
House	\$500

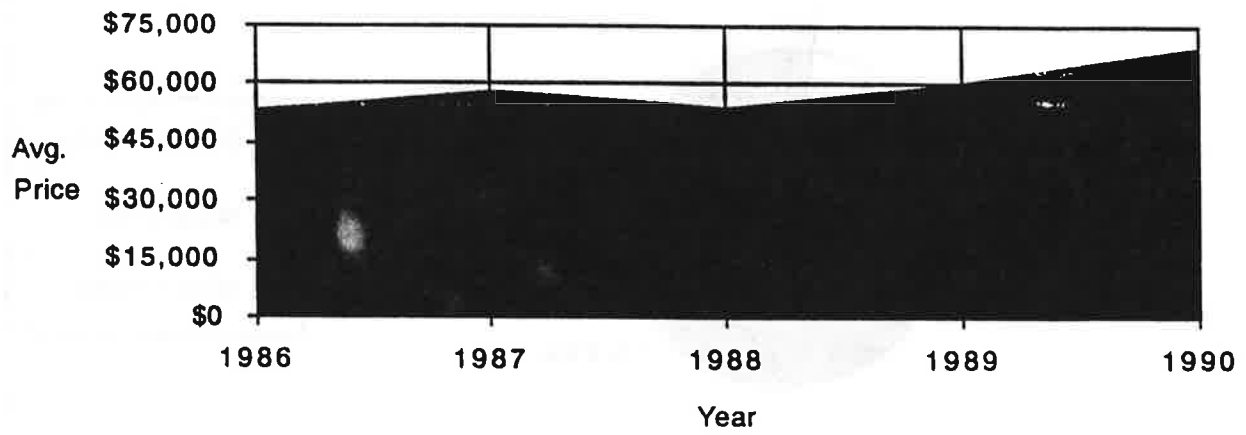
- Vacancies in Port Angeles are very low, at 0 to 1% in most rental housing types. There is a shortage of 2-3 bedroom homes for rent. Many homes are being converted out of rental status for home ownership.
- Families earning less than 78% of median income for a family of four cannot afford to rent an average priced 2 bedroom house in the Port Angeles rental market. (Based upon a definition which defines affordability as 30% of gross income for rent and utilities) Apartments are more affordable, but are still out of reach of many families who earn minimum wage, average wage, or fixed incomes from public sources.
- There are 73.9 recipients of public assistance per 1,000 Port Angeles/Clallam County residents as compared with the State figure of 66.6 recipients per 1,000 population.

**Port Angeles Housing Mix
1990**



Source: Pacific Development Concepts/WA State OFM 1991

**Weighted Average Single Family Home Price
Port Angeles 1986-1990**



Source: Pacific Development Concepts/The Digest 1991

**SELECTED POPULATION, ECONOMIC, AND HOUSING DATA
JEFFERSON-CLALLAM HOUSING NEEDS STUDY, 1991**

PORT ANGELES

Population and Households

Population	1980	1990	% Change
Unincorporated	28,264	32,235	14%
Incorporated	23,384	24,229	4%
Port Angeles	17,311	17,710	2%
Forks	3,060	2,902	-5%
Sequim	3,013	3,617	20%
Total	51,648	56,464	9%
 Households	 6,937	 7,360	 6%
Owner Households	4,281	Available 1990	
Renter Households	2,656	Census 8/91	
 Household Size	 2.42	 2.34	 -3%
 Age Distribution			
00-19	5,085	Available 1990	
20-29	3,153	Census 8/91	
30-39	2,187		
40-64	4,335		
65-74	1,459		
75+	1,092		
 Race			
White	16,563	16,880	2%
Black	47	70	49%
Indian, Eskimo & Aleut	436	448	3%
Asian and Pacific Islander	155	249	61%
Other	110	63	-43%
Hispanic Origin	252	288	14%

Housing Units

Unit Type	1980	1990	% Change
Total Units	7,288	7,863	8%
Single Family Units	5,579	5,931	6%
Multi-Family Units	1,601	1,799	12%
Mobile Home Units	108	133	23%

Assisted Units

Renters:

Family	190
Elderly	227

Persons in

Group Quarters	516	488	-5%
Occupied Units	6,937	7,360	6%
Vacant Units	346	473	37%

Housing Condition and Valuation

Single Family Housing Condition	1980	1990	% Change
Low		179	
Fair		820	
Average		2,443	
Good		2,165	
Very Good		467	
Excellent		0	
Total		6,074	

School District

Assessed Value 000's	\$791,998	\$948,696	20%
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Owner Characteristics

	1980	1990	% Change
Owner Households	4,281	Available 1990 Census 8/91	
Median Home Value	\$51,600	\$69,195	34%
Income Needed to Afford Average Home	\$25,043	\$27,495	10%

Renter Characteristics

	1980	1990	% Change
Renter Households	2,656	Available 1990 Census 8/91	
Median Contract Rent	\$189		
Rental Vacancy Rate	5.8		
Income Needed to Afford Average Rent	\$9,560		

Income Characteristics

	1980	1990	% Change
Household Income			
> \$5,000	951	Available 1990	
\$5,000 to \$7,499	664	Census Summer	
\$7,500 to \$9,999	567	1993	
\$10,000 to \$14,999	1,043		
\$15,000 to \$19,999	914		
\$20,000 to \$24,999	825		
\$25,000 to \$34,999	1,175		
\$35,000 to \$49,999	556		
\$50,000 or more	239		
Household Median	\$16,890	\$23,700	40%
Family Median	\$19,796	\$30,000	52%
30% of Median	\$5,939	\$9,000	52%
50% of Median	\$9,898	\$15,000	52%
80% of Median	\$15,837	\$24,000	52%

Public Assistance

Port Angeles/Clallam	
Recipients	3,154
Recipients per 1000	73.9
State Recipients	310,507
Recipients per 1000	66.6

Labor Characteristics

	1980	1990	% Change
Total Labor Force	21,100	24,430	16%
Employed	18,230	22,570	24%
Unemployed	2,880	1,860	-35%
Unemployment Rate	13.6	7.6	
Per Capita Income	\$9,402	\$14,142	50%
Avg Income Per Job	\$14,082	\$17,745	26%

Homeless

	1980	1990	% Change
Homeless Individuals		1,443	
Bednights Provided		11,519	
Turnaways		137	

Note 1: The data presented for 1980 and 1990 are derived from a number of sources and from slightly different time-frames. The data presented is the most recent data available in March, 1991. As 1990 Census Data becomes available, and other sources are updated by the State, the data can be readily updated.

Note 2: The shaded regions represent data which is presented at the County-wide level.

**AFFORDABILITY ANALYSIS
JEFFERSON-CLALLAM HOUSING NEEDS STUDY, 1991**

PORT ANGELES

Homeowner Affordability

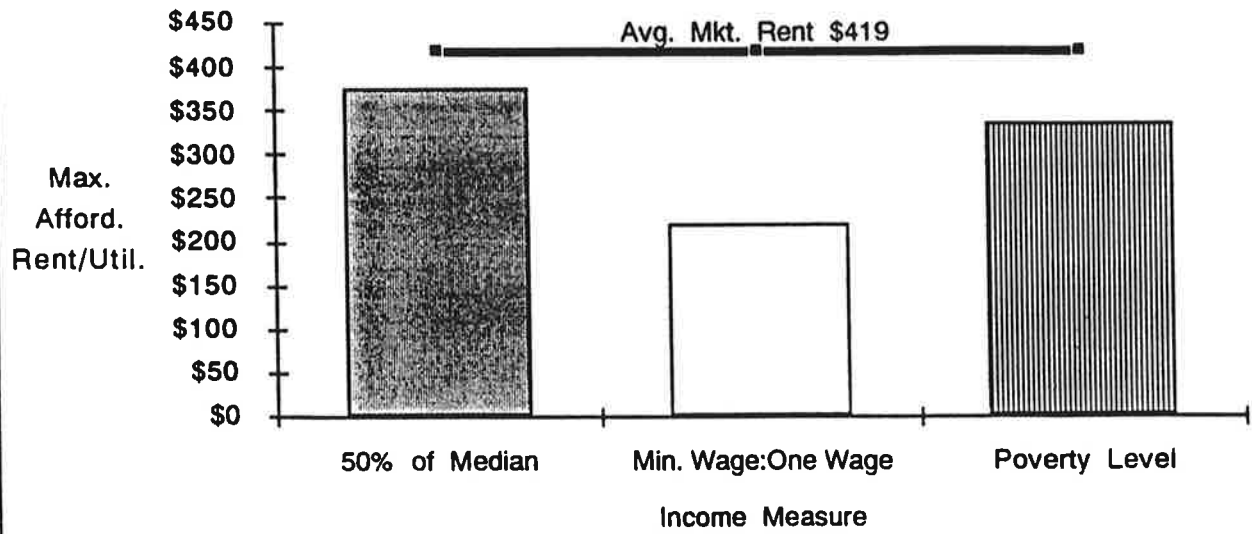
Underlying Assumptions:

- (1) Median home value is \$69,195.
- (2) Income needed to afford average home is \$27,495.*
- (3) Percentage of median income necessary to afford average home is 92%.

	<u>1990</u>	<u>Income (Gap) or Surplus to Afford Average Home</u>
Family Median Income	\$30,000	\$2,505
80% of Median Income	\$24,000	(\$3,495)
50% of Median Income	\$15,000	(\$12,495)

* Based on 10/90 loan to value ratio, 360 periods, 9.91% interest rate, 13% of value for taxes and \$250/year for insurance all equaling 28% of gross income.

**Port Angeles-Affordability of 2-Bedroom Apartment
Family of Four, Rent+Utilities, 1991**



Source: Pacific Development Concepts

**AFFORDABILITY ANALYSIS
JEFFERSON-CLALLAM HOUSING NEEDS STUDY, 1991**

PORT ANGELES

Affordability of Average Rent for a 2-Bedroom Apartment

Underlying Assumptions:

- (1) Federal affordability standard: rent + utilities = 30% of gross income.
- (2) Based upon family of four.
- (3) Average rent for 2-bedroom apartment is \$375.
- (4) Average utility/service allowance is \$44.
- (5) Average rent + utilities is \$419.

<u>Income Measure</u>	<u>Annual Income</u>	<u>Max. Affordable Rent + Utilities @30% of Gross</u>	<u>Income (Gap) or Surplus to Afford Avg. Rent/Mo.</u>	<u>% of Income Needed to Afford Avg. Rent</u>
Poverty	\$13,400	\$335	(\$84)	38%
Minimum Wage:				
One Wage	\$8,840	\$221	(\$198)	57%
Two Wage	\$17,680	\$442	\$23	28%
Average Wage:				
One Wage	\$17,784	\$445	\$26	28%
Two Wage	\$35,568	\$889	\$470	14%
50% of Median	\$15,000	\$375	(\$44)	34%
Median	\$30,000	\$750	\$331	17%

**AFFORDABILITY ANALYSIS
JEFFERSON-CLALLAM HOUSING NEEDS STUDY, 1991**

PORT ANGELES

Affordability of Average Rent for a 2-Bedroom House

Underlying Assumptions:

- (1) Federal affordability standard: rent + utilities = 30% of gross income.
- (2) Based upon family of four.
- (3) Average rent for 2-bedroom house is \$500.
- (4) Average utility/service allowance is \$82.
- (5) Average rent + utilities is \$582.

<u>Income Measure</u>	<u>Annual Income</u>	<u>Max. Affordable Rent + Utilities @30% of Gross</u>	<u>Income (Gap) or Surplus to Afford Avg. Rent/Mo.</u>	<u>% of Income Needed to Afford Avg. Rent</u>
Poverty	\$13,400	\$335	(\$247)	52%
Minimum Wage:				
One Wage	\$8,840	\$221	(\$361)	79%
Two Wage	\$17,680	\$442	(\$140)	40%
Average Wage:				
One Wage	\$17,784	\$445	(\$137)	39%
Two Wage	\$35,568	\$889	\$307	20%
50% of Median	\$15,000	\$375	(\$207)	47%
Median	\$30,000	\$750	\$168	23%

**RENTAL HOUSING SUMMARY
JEFFERSON-CLALLAM HOUSING NEEDS STUDY, 1991**

PORT ANGELES AREA

Rental Housing Composition

<u>Housing Type</u>	<u>No. of Units*</u>	<u>% of Total</u>
Multi-Family	1601	60%
Single Family- and Mobile Home	1055	40%

*Based on 1980 Census figures.

Single Family Residence Rents and Vacancies

<u>Number of Bedrooms</u>	<u>1991 Rent Range*</u>	<u>Average Rent</u>	<u>% Vacant</u>
1 Bedroom	\$300-\$400	\$350	0%
2 Bedroom	\$400-\$650	\$500	0%
3 Bedroom	\$450-\$1,000	\$600	0%
4 Bedroom	\$500-\$850	\$650	0%

*1991 rent figures represent actual current effective rents in March and April 1991.

Note: Expect continued upward pressure on rents. Some rental homes have been lost to owner occupied housing during the last year which further contributed to the rental shortage. Approximately 400 homes are available as long term rentals in the Port Angeles area.

Duplex to Fourplex Rents and Vacancies

<u>Number of Bedrooms</u>	<u>1991 Rent Range*</u>	<u>Average Rent</u>	<u>% Vacant</u>
1 Bedroom	\$325-\$350	\$325	0%
2 Bedroom	\$350-\$495	\$400	0%
3 Bedroom	None Available		
4 Bedroom	None Available		

*1991 rent figures represent actual current effective rents in March and April 1991.

Note: No additions to supply are projected in 1991. Expect upward pressure on rents for 1991.

Apartment Rents and Vacancies

<u>Number of Bedrooms</u>	<u>1991 Rent Range*</u>	<u>Average Rent</u>	<u>% Vacant</u>
1 Bedroom	\$210-\$350	\$325	0-1%
2 Bedroom	\$275-\$475	\$375	0-1%
3 Bedroom	None Available		
4 Bedroom	None Available		

*1991 rent figures represent actual current effective rents in March and April 1991.

Note: Approximately 250 apartment units are available in the Port Angeles area. A modest vacancy exists in non-subsidized units as Landmark Management reports 5 available units. No new apartments are being built at present. Expect mild upward pressure on rents. A waiting list currently exists for subsidized units.

Mobile Home Park-Leased Space, Rents and Vacancies

Type of Space	1991 Rent Range*	Average Rent	% Vacant
Single Wide	\$135-\$165	\$140	0%
Double Wide	\$140-\$160	\$160	0%
RV	\$120-\$265	\$190	Seasonal Fluctuations

*1991 rent figures represent actual current effective rents in March and April 1991.

Note: Strong demand as most parks are 100% occupied. No new mobile home parks are planned in the near future.

Summary Comments

Shortage of 2-3 bedroom homes for rent. The three property managers have only 3 homes and 11 apartments for rent. Many homes are being purchased by future retirees. A limited care retirement home, Park View Villa has 27 vacant units out of a total 107. Rents range from \$600-\$1,400 per month.

Source: Russ Mellon, Rent Survey 4/91, Pacific Development Concepts.

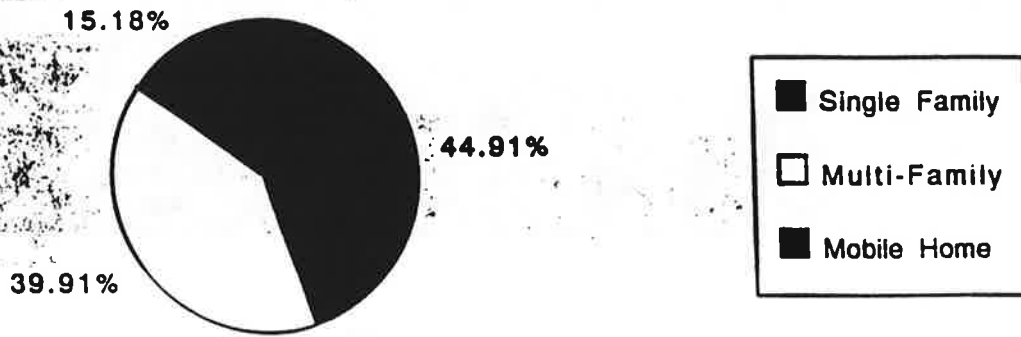
**Population, Economic and
Housing Profile, Sequim**

Population, Economic, and Housing Profile Sequim

- The population of Sequim has increased by 20% between 1980 and 1990, by far the largest percentage increase of any Clallam Community in the last decade. The population increase between 1970 and 1980 was even more dramatic, when Sequim grew 94.51%.
- The average household size is lowest in the County and has decreased as all other Clallam Communities from 1.99 persons to 1.84 persons per household.
- The population of Sequim is becoming somewhat more ethnically more diverse. African-Americans, Native Americans and Alaskan Natives, and people of Hispanic origin all increased in number between 1980 and 1990. However, in 1990, 97% of all persons are white.
- Mobile home units increased by 18% between 1980 and 1990, compared with a 14% increase in single family units and an 29% increase in multi-family units. Overall housing units increased by 320 units.
- The composition of the housing stock is balanced between multifamily units (39.91%), single family units (44.9%) and mobile homes (15.18%). Overall single family density still predominates in Sequim with 60% of Sequim occupied by either single family homes or mobile homes.
- There are 247 assisted rental housing units in Sequim.
- 23% of the housing stock is in poor to fair condition. (This does not include multi-family buildings larger than duplexes for which condition data was not available.)

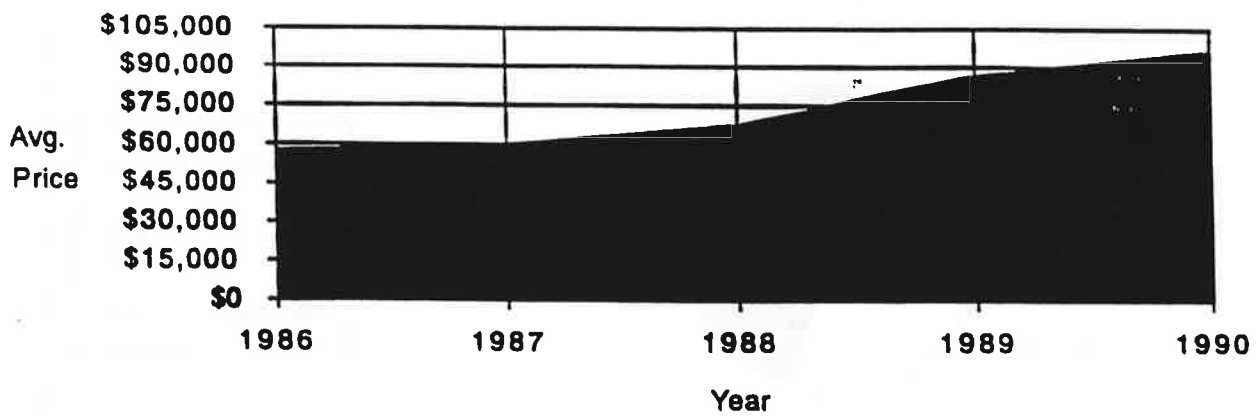
- Sequim experienced the largest increase in average home values in Clallam County in the last ten years. Much of the increase occurred since 1986. The median home value increased by 72% in ten year period of 1980-1990 from \$51,300 to \$88,244. At the same time, the amount of income required to purchase the average priced home rose from \$24,903 to \$34,818 an increase of 40%. In Sequim in 1990 a family had to earn 116% of median income to afford the average home.
- Rental rates in Sequim range from an average of \$475 for a two bedroom house to an average of \$450 for a duplex to fourplex, and \$388 for a 2 bedroom apartment. Vacancy rates are 0-2%, with a few vacancies existing in higher priced homes for rent. In the leased land category for placement of mobile homes, all existing parks 3 years old and older are full. Over 100 spaces are or will be available in new parks in Sequim. Spaces rent from \$120 to \$190.
- Sequim is the least affordable rental market in the County. Families and workers who are needed to provide services in the area cannot afford to live in Sequim. For example, a full time minimum wage earner would pay 59% of his income to afford an average priced 2 bedroom apartment in Sequim.
- The assessed valuation for the Sequim School District increased 73% in the ten year span.

**Sequim Housing Mix
1990**



Source: Pacific Development Concepts/WA State OFM 1991

**Weighted Average Single Family Home Price
Sequim 1986-1990**



Source: Pacific Development Concepts/The Digest 1991

**SELECTED POPULATION, ECONOMIC, AND HOUSING DATA
JEFFERSON-CLALLAM HOUSING NEEDS STUDY, 1991**

SEQUIM

Population and Households

Population	1980	1990	% Change
Unincorporated	28,264	32,235	14%
Incorporated	23,384	24,229	4%
Sequim	3,013	3,617	20%
Forks	3,060	2,902	-5%
Port Angeles	17,311	17,710	2%
Total	51,648	56,464	9%
 Households	 1,406	 1,828	 30%
Owner Households	832	Available 1990	
Renter Households	574	Census 8/91	
 Household Size	 1.99	 1.84	 -8%
 Age Distribution			
00-19	553	Available 1990	
20-29	327	Census 8/91	
30-39	240		
40-64	623		
65-74	629		
75+	641		
 Race			
White	2,912	3,499	20%
Black	8	10	25%
Indian, Eskimo & Aleut	24	48	100%
Asian and Pacific Islander	55	47	-15%
Other	14	12	-14%
Hispanic Origin	25	66	164%

Housing Units

Unit Type	1980	1990	% Change
Total Units	1,597	1,917	20%
Single Family Units	758	861	14%
Multi-Family Units	592	765	29%
Mobile Home Units	247	291	18%

Assisted Units

Renters:

Family	72
Elderly	175

Persons in

Group Quarters	216	249	15%
Occupied Units	1,406	1,828	30%
Vacant Units	187	126	-33%

Housing Condition and Valuation

Single Family Housing Condition	1980	1990	% Change
Low		66	
Fair		190	
Average		467	
Good		247	
Very Good		126	
Excellent		0	
Total		1,096	

School District

Assessed Value 000's	\$404,200	\$698,302	73%
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Owner Characteristics

	1980	1990	% Change
Owner Households	832	Available 1990	
		Census 8/91	
Median Home Value	\$51,300	\$88,244	72%
Income Needed to Afford Average Home	\$24,903	\$34,818	40%

Renter Characteristics

	1980	1990	% Change
Renter Households	574	Available 1990 Census 8/91	
Median Contract Rent	\$187		
Rental Vacancy Rate	13.4		
Income Needed to Afford Average Rent	\$9,480		

Income Characteristics

	1980	1990	% Change
Household Income			
> \$5,000	191	Available 1990	
\$5,000 to \$7,499	218	Census-Summer	
\$7,500 to \$9,999	194	1993	
\$10,000 to \$14,999	310		
\$15,000 to \$19,999	207		
\$20,000 to \$24,999	148		
\$25,000 to \$34,999	101		
\$35,000 to \$49,999	36		
\$50,000 or more	6		

Household Median	\$16,890	\$23,700	40%
Family Median	\$19,796	\$30,000	52%
30% of Median	\$5,939	\$9,000	52%
50% of Median	\$9,898	\$15,000	52%
80% of Median	\$15,837	\$24,000	52%

Public Assistance

Port Angeles/Clallam		
Recipients		3,154
Recipients per 1000		73.9
State Recipients		310,507
Recipients per 1000		66.6

Labor Characteristics

	1980	1990	% Change
Total Labor Force	21,100	24,430	16%
Employed	18,230	22,570	24%
Unemployed	2,880	1,860	-35%
Unemployment Rate	13.6	7.6	
Per Capita Income	\$9,402	\$14,142	50%
Avg Income Per Job	\$14,082	\$17,745	26%

Homeless

	1980	1990	% Change
Homeless Individuals		1,443	
Bednights Provided		11,519	
Turnaways		137	

Note 1: The data presented for 1980 and 1990 are derived from a number of sources and from slightly different time-frames. The data presented is the most recent data available in March, 1991. As 1990 Census Data becomes available, and other sources are updated by the State, the data can be readily updated.

Note 2: The shaded regions represent data which is presented at the County-wide level.

**AFFORDABILITY ANALYSIS
JEFFERSON-CLALLAM HOUSING NEEDS STUDY, 1991**

SEQUIM

Homeowner Affordability

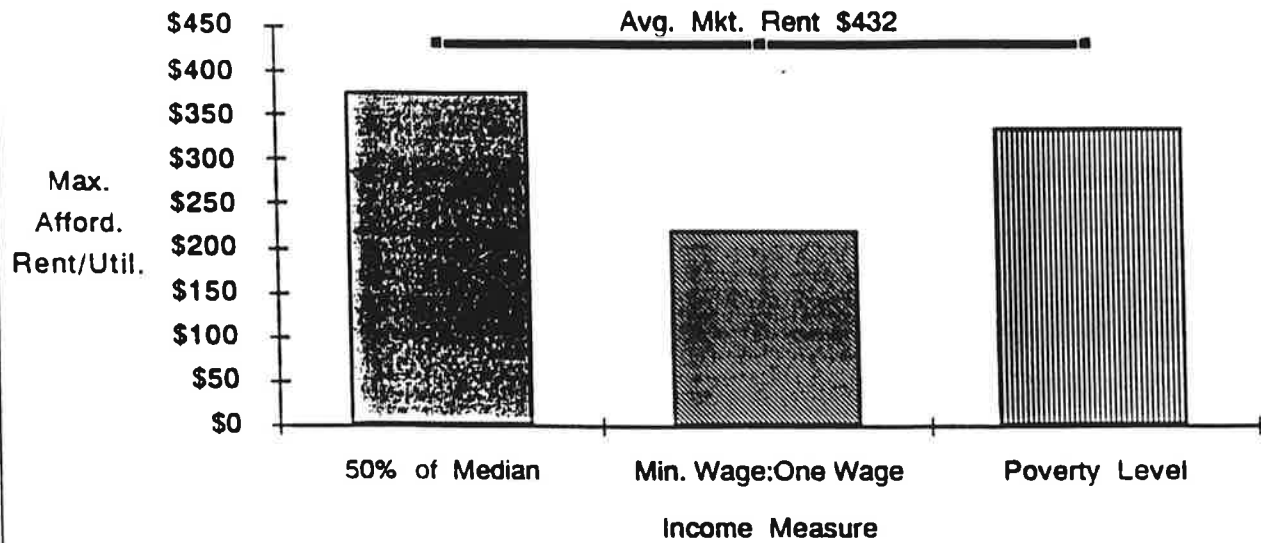
Underlying Assumptions:

- (1) Median home value is \$88,244.
- (2) Income needed to afford average home is \$34,818.*
- (3) Percentage of median income necessary to afford average home is 116%.

	<u>1990</u>	<u>Income (Gap) or Surplus to Afford Average Home</u>
Family Median Income	\$30,000	(\$4,818)
80% of Median Income	\$24,000	(\$10,818)
50% of Median Income	\$15,000	(\$19,818)

* Based on 10/90 loan to value ratio, 360 periods, 9.91% interest rate, 13% of value for taxes and \$250/year for insurance all equaling 28% of gross income.

**Sequim-Affordability of 2-Bedroom Apartment
Family of Four, Rent+Utilities, 1991**



Source: Pacific Development Concepts

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**AFFORDABILITY ANALYSIS
JEFFERSON-CLALLAM HOUSING NEEDS STUDY, 1991**

SEQUIM

Affordability of Average Rent for a 2-Bedroom Apartment

Underlying Assumptions:

- (1) Federal affordability standard: rent + utilities = 30% of gross income.
- (2) Based upon family of four.
- (3) Average rent for 2-bedroom apartment is \$388.
- (4) Average utility/service allowance is \$44.
- (5) Average rent + utilities is \$432.

<u>Income Measure</u>	<u>Annual Income</u>	<u>Max. Affordable Rent + Utilities @30% of Gross</u>	<u>Income (Gap) or Surplus to Afford Avg. Rent/Mo.</u>	<u>% of Income Needed to Afford Avg. Rent</u>
Poverty	\$13,400	\$335	(\$97)	39%
Minimum Wage:				
One Wage	\$8,840	\$221	(\$211)	59%
Two Wage	\$17,680	\$442	\$10	29%
Average Wage:				
One Wage	\$17,784	\$445	\$13	29%
Two Wage	\$35,568	\$889	\$457	15%
50% of Median	\$15,000	\$375	(\$57)	35%
Median	\$30,000	\$750	\$318	17%

**AFFORDABILITY ANALYSIS
JEFFERSON-CLALLAM HOUSING NEEDS STUDY, 1991**

SEQUIM

Affordability of Average Rent for a 2-Bedroom House

Underlying Assumptions:

- (1) Federal affordability standard: rent + utilities = 30% of gross income.
- (2) Based upon family of four.
- (3) Average rent for 2-bedroom house is \$475.
- (4) Average utility/service allowance is \$82.
- (5) Average rent + utilities is \$557.

<u>Income Measure</u>	<u>Annual Income</u>	<u>Max. Affordable Rent + Utilities @30% of Gross</u>	<u>Income (Gap) or Surplus to Afford Avg. Rent/Mo.</u>	<u>% of Income Needed to Afford Avg. Rent</u>
Poverty	\$13,400	\$335	(\$222)	50%
Minimum Wage:				
One Wage	\$8,840	\$221	(\$336)	76%
Two Wage	\$17,680	\$442	(\$115)	38%
Average Wage:				
One Wage	\$17,784	\$445	(\$112)	38%
Two Wage	\$35,568	\$889	\$332	19%
50% of Median	\$15,000	\$375	(\$182)	45%
Median	\$30,000	\$750	\$193	22%

RENTAL HOUSING SUMMARY
JEFFERSON-CLALLAM HOUSING NEEDS STUDY, 1991

SEQUIM AREA

Rental Housing Composition

<u>Housing Type</u>	<u>No. of Units*</u>	<u>% of Total</u>
Multi-Family	399	70%
Single Family- and Mobile Home	175	30%

*Based on 1980 Census figures. Multi-Family housing is computed based on 592 units reported in the 1980 Census less 13% vacancy and 116 units which had been converted from apartments to condominiums, resulting in 399.

Single Family Residence Rents and Vacancies

<u>Number of Bedrooms</u>	<u>1991 Rent Range*</u>	<u>Average Rent</u>	<u>% Vacant</u>
1 Bedroom	None Available		
2 Bedroom	\$375-\$1100	\$450-\$500	0-1%
3 Bedroom	\$450-\$1,200	\$700	0-1%
4 Bedroom	\$600-\$1200	\$700	0%

*1991 rent figures represent actual current effective rents in March and April 1991.

Note: Approximately 250-300 homes are available as rentals in the Sequim area. Land Mark Management has about 170 homes with 10 presently available. A slight increase in rental housing may occur as retirees purchase existing homes and rent them for 1-5 years. Rents are expected to remain stable and may show a moderate over the next year. The three property management firms have 8 two-bedroom homes for rent with all except two over \$500/month. They have 5 three-bedroom homes available with none under \$700/month.

Duplex to Fourplex Rents and Vacancies

<u>Number of Bedrooms</u>	<u>1991 Rent Range*</u>	<u>Average Rent</u>	<u>% Vacant</u>
1 Bedroom	\$300-\$350	\$325	0%
2 Bedroom	\$400-\$700	\$450	0-1%
3 Bedroom	None Available		
4 Bedroom	None Available		

*1991 rent figures represent actual current effective rents in March and April 1991.

Note: Approximately 6 units are currently under construction with asking rents likely to fall in the \$600-\$700 range. Currently, 40-50 units make up the rental supply. Expect rents to remain stable for the remainder of 1991.

Apartment Rents and Vacancies

<u>Number of Bedrooms</u>	<u>1991 Rent Range*</u>	<u>Average Rent</u>	<u>% Vacant</u>
1 Bedroom	\$295-\$375	\$325	1-2%
2 Bedroom	\$365-\$550	\$375-\$400	0-1%
3 Bedroom	\$425	\$425	0%
4 Bedroom	None Available		

*1991 rent figures represent actual current effective rents in March and April 1991.

Note: Over 350 apartment units are available in the Sequim area. There are currently 11 vacant one-bedroom apartments and 4 vacant two-bedroom units. No new apartment construction is scheduled for 1991. Rents are expected to remain fairly stable as supply is in balance with demand. Subsidized apartments have a waiting list of at least 20 per apartment building.

Mobile Home Park-Leased Space, Rents and Vacancies

Type of Space	1991 Rent Range*	Average Rent	% Vacant
Single Wide	\$120-\$143	\$120	0%
Double Wide	\$142-\$190	\$165	0%
RV	\$195-\$225	Seasonal Fluctuations	

*1991 rent figures represent actual current effective rents in March and April 1991.

Note: All of the existing parks 3 years old and older are full. Hendrickson's new park in town with 54 available spaces has only 4 occupied at present. Hendrickson's asking rents are \$190/month which is the highest in the area. Demand has generally been quite good as some retirees prefer this life style. Parkwood #2 has 54 potential new spaces. A new park off N 5th is to have 38 spaces. Hendrickson plans a total of 70 spaces and has only 4 filled at present.

Summary Comments

No significant stock of condominium rentals exists. Dominion Terrace has 2 two-bedroom units 1 @ \$725/mo. and 1 @ \$850/mo. The 5th Ave. retirement complex has 71 units with rents ranging from \$1,075 (studio) to \$1,975 (deluxe) per month. There are 42 one-bedroom units @ \$1,295/mo. with ten on the current waiting list for these units. The home provides three meals per day a recreation hall, transportation to town and other various programs. Thirty more units may enter the retirement home supply in the near future. Demand from retirees is down somewhat from 1990. A few single family homes are available in the upper range, but available supply between \$400-\$600/mo. is limited. Most tenants stay put as landlords generally don't raise rent until a change in tenancy. Greatest vacancy (11) is in one-bedroom apartment units as some tenants have moved into two-bedroom units and share expenses. Little to no vacancy exists in existing mobile home parks and a good supply of new spaces is available.

Source: Russ Mellon, Rent Survey 4/91, Pacific Development Concepts.

**Subsidized Housing, Clallam
County**

Subsidized Housing, Clallam County

- There are 910 units of subsidized rental housing in Clallam County offering income eligible occupants units at controlled rents or rents supplemented by rent subsidies.
- All of the permanent rental subsidized housing is located in incorporated areas except 34 units located in Clallam Bay.
- Subsidized housing comprises 21% of all multifamily housing in the County.
- 526 units (58%) of all subsidized housing (permanent and rent vouchers and certificates) are located in Port Angeles.
- An estimated 14% of renter households live in subsidized housing in Clallam County.
- While 16% of the population is over 64, 49% of subsidized rental housing is reserved for senior populations. 51% of subsidized housing is available to families.
- The primary sources of funds for development of subsidized rental housing in Clallam County have been Farmer's Home Administration and Department of Housing and Urban Development. Other sources include low income tax credits, and tax exempt financing.
- Farmer's Home Administration (FmHA) also provides low interest purchase and repair loans to income eligible homeowners. In 1991, FmHA has 226 borrowers in Clallam County. Since 1987, FmHA has invested \$6,286,250 in Clallam and Jefferson Counties in single family purchase and repair loans. Most recent single family loan activity is derived from Clallam County. The repair loan program is underutilized, with only 8 loans having been made since 1987.

- The Section 8 rental assistance and conventional housing waiting lists for Clallam kept by the County Housing Authority reveals many characteristics of demand for affordable housing in Clallam County:

Most households waiting for rental assistance from the Clallam County Housing Authority live in Port Angeles.

68% of the demand is for 2 and 3 bedroom units.

Only households which meet federal preference criteria for provision of subsidized housing are receiving rental assistance. In order to qualify families must pay over 50% of their income for rent, live in substandard housing, or be displaced or homeless.

Most households waiting are headed by a single heads of household. Many more families with children wait for subsidized housing than do elderly households. 321 families wait, while 67 elderly households and 121 disabled households wait.

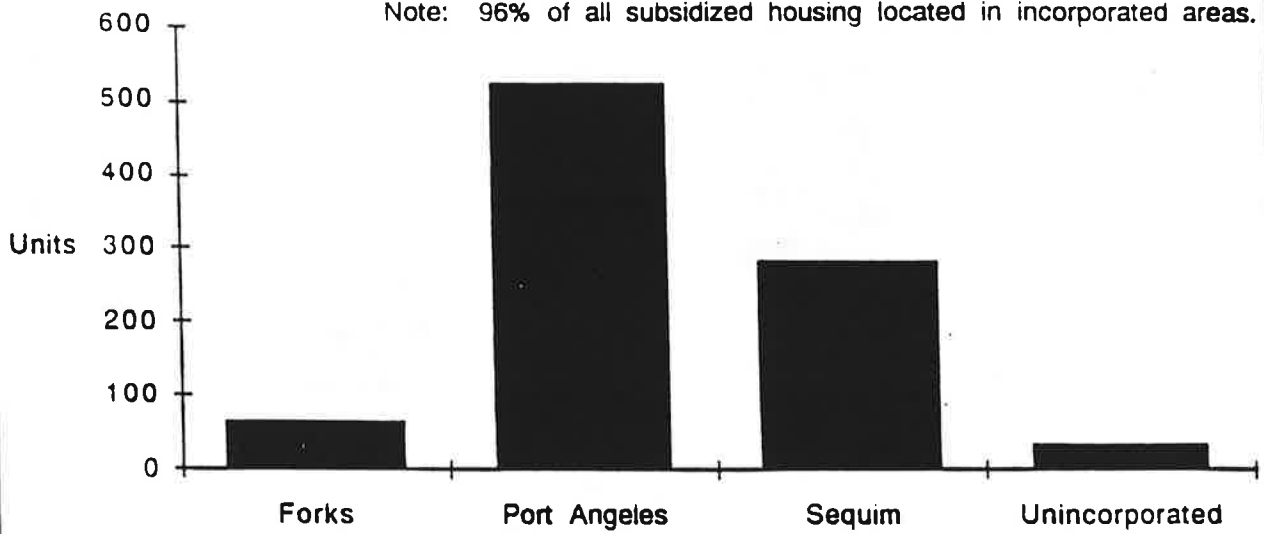
The typical wait is from 12 to 24 months for 2 bedroom units and over.

Some households are unable to use rental assistance once it is made available to them because rental properties cannot be found for the rent amount allowed for rental assistance, especially for 3 bedroom units.

The average gross rent paid by the housing authority and tenant is \$459 including utilities.

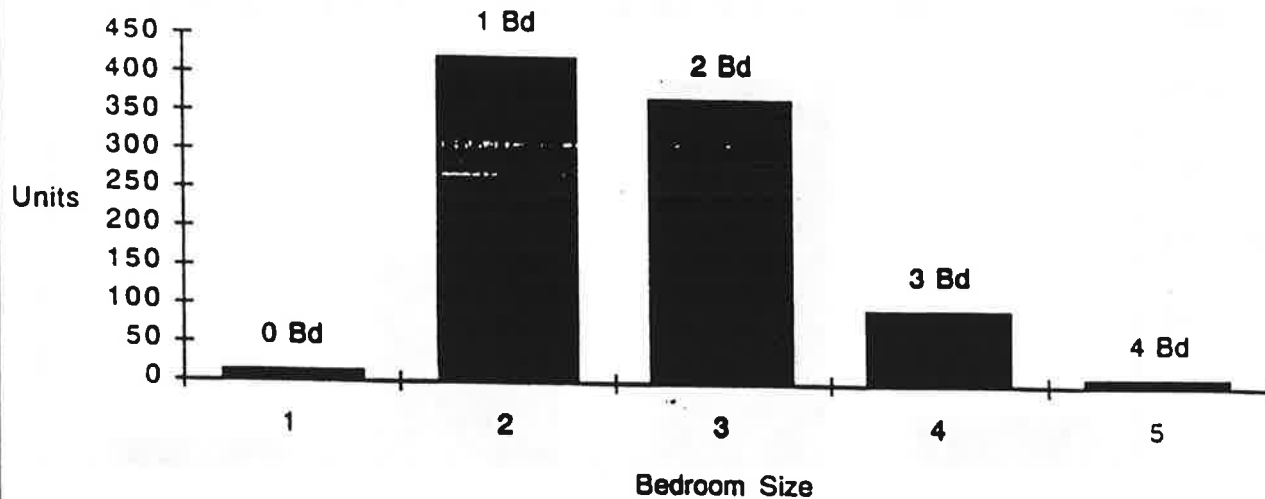
Geographic Distribution of Subsidized Rental Units

Note: 96% of all subsidized housing located in incorporated areas.



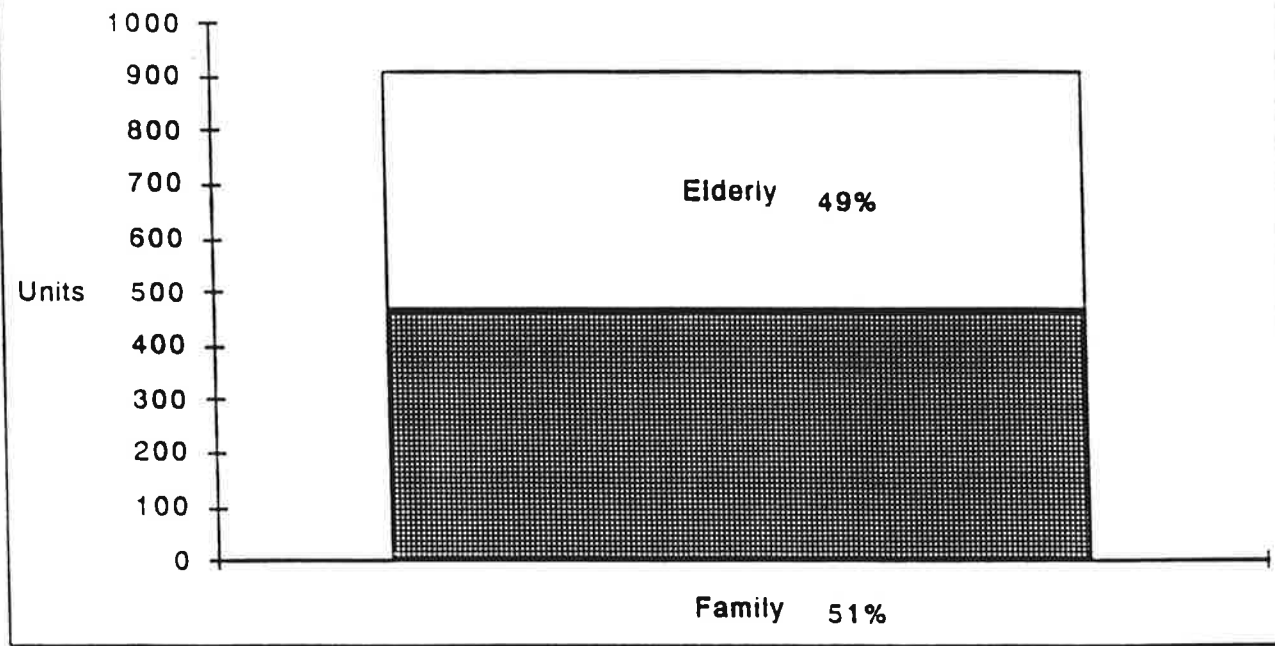
Source: Pacific Development Concepts 4/91

Subsidized Rental Housing by Bedroom Size, Clallam County



Source: Pacific Development Concepts, 1991

Elderly and Family Housing Subsidy Distribution, Clallam County



Source: Pacific Development Concepts, 1991

**Table 1. Subsidized Rental Housing by Location, Renter Group, and Bedroom Size
Clallam County**

	Bedroom Size					Total
	0	1	2	3	4	
Permanent Housing						
Forks						
Family		15	46	3		64
Elderly						
Port Angeles						
Family		26	102	54	8	190
Elderly	6	221				227
Sequim						
Family			72			72
Elderly		97	78			175
Unincorporated (Clallam Bay)						
Family	6	20	8			34
Elderly						
Certificates and Vouchers						
Family		8	57	37	3	105
Elderly		36	5	2		43
Total All Sub- sidized units	12	423	368	96	11	910

Source: Pacific Development Concepts from Department of Housing and Urban Development, Farmer's Home Administration, and State Housing Finance Commission Data

**Table 2. Distribution of Vouchers and Certificates by Community
Clallam County**

Forks	1
Port Angeles	105
Sequim	36
Unincorporated	2
Unknown	4
Total	148

Source: Clallam County Public Housing Authority, 4-91

**Table 3. Family and Elderly/Disabled Subsidized Housing Distribution
Clallam County**

Total Family	465
Total Elderly	445
Total	910

Source: Pacific Development Concepts Analysis of Department of Housing and Urban Development, Farmers Home Administration, State Housing Finance Commission and Public Housing Authority Data, 4/91

**Table 4. Distribution of Subsidized Rental Housing by Community
Clallam County**

Forks	65
Port Angeles	526
Sequim	283
Unincorporated	36
Total	910

Source: Pacific Development Concepts, 4/91

**Table 5, Department of Housing and Urban Development Income Limits, 1/90
Clallam County**

FY 1990 Median Family Income: \$30,000									
Hshld Size	1 person	2 person	3 person	4 person	5 person	6 person	7 person	8 person	
Lower Income	\$16,800	\$19,200	\$21,600	\$24,000	\$25,500	\$27,000	\$28,500	\$30,000	
Very Low	\$10,500	\$12,000	\$13,500	\$15,000	\$16,200	\$17,400	\$18,600	\$19,800	

Note: Applicable in Port Angeles, Forks, and Sequim
Source: DHUD, 2-91

Table 6, Federal 1991 Poverty Guidelines

Hshld Size	1 person	2 person	3 person	4 person	5 person	6 person	7 person	8 person
	\$6,620	\$8,880	\$11,140	\$13,400	\$15,660	\$17,920	\$20,180	\$22,440

Source: February 20, 1991 Federal Register, Vol 56, No. 34.

**Table 7, Fair Market Rents (Certificate, Voucher and Moderate Rehabilitation Programs)
Clallam County**

		Bedroom Size		
0 Br	1 Br	2 Br	3 Br	4 Br
\$355	\$431	\$508	\$635	\$713

Source: Department of Housing and Urban Development, Eff 10/1/90

**Table 8, Manufactured Home Spaces, Fair Market Rents
Clallam County**

	Single Wide	Double Wide
Rent	\$130	\$151

Source: Clallam County Housing Authority 2-91

**Table 9, Programs Administered by Clallam County Housing Authority
Clallam County**

Program	Bedroom Size					Total
	0	1	2	3	4	
Elderly Certs		23	2			25
Elderly Vouchers		13	3	2		18
Elderly Conv 1	6	61	3			70
Elderly Conv 2		40				40
Elderly Conv 3		55	5			60
Subtotal	6	192	13	2		213
Family Certs		8	38	27	2	75
Fam Vouchers			19	10	1	30
Family Conv		6	38	48	8	100
Subtotal, Family		14	95	85	11	205
TOTAL PH	6	206	108	87	11	418

Note: All rental housing owned by the housing authority is located in Port Angeles.

Source: Clallam County Housing Authority, 2-91

Table 10. Farmer's Home Administration Rental Housing Projects, Forks

Type/Name Family	Bedroom Size and Rent Range				Total
	0	1	2	3	
Peninsula Apts Forks		12 331	32 362		44
Ox Bow Apts		3	14	3	20
	220/382	268/490	315/599		
Total FmHA		15	46	3	64

Source: Farmers Home Administration, 2/91

**Table 11. Farmer's Home Administration Permanent Rental Projects:
Port Angeles, Clallam County**

Type/Name Family	Bedroom Size and Rent Range					Total
	0	1	2	3	4	
Wildwood Terrace Port Angeles		16	40			56
		184/269	211/319			
Hilltop Ridge Port Angeles		4	24	6		34
		240/455	275/525	320/575		
Subtotal		20	64	6		90
Elderly						35
Pine Road Port Angeles		32	3			35
		255/450	275/485			
Subtotal		32	3			35
Total FmHA		52	67	6		125

Source: Farmer's Home Administration District Office, 1991

**Table 12. HUD Subsidized Housing
Port Angeles, Clallam County**

Type/Name Elderly	Bedroom Size					Total
	0	1	2	3	4	
Clallam County Hostels		12				12
Total						12

Source: Households at Risk: Loss of Federally Assisted Housing in Washington, James L. McIntire, 1989.

**Table 13. Tax Exempt Financed Housing
Port Angeles, Clallam County**

Type/Name Elderly	Bedroom Size					Total
	0	1	2	3	4	
Park View Villas		9	12			21
Total			21			21

Source: Housing Finance Commission Rental Resource Guide. 11/89

**Table 14, Farmer's Home Administration Rental Projects
Sequim**

Type/Name Family	Apartments by Bedroom Size and Rent Range					Total
	0	1	2	3	4	
Mt. View I Sequim			40			40
			218/303			
Mt. View II Sequim			32			32
			252/377			
Subtotal			72			72
Elderly						
Suncrest 1 Sequim		44				44
Suncrest II Sequim		19	5			24
Subtotal Elder		63	5			68
Total FmHA		63	77			140

Source: Farmer's Home Administration District Office Port Angeles, 3/91

**Table 15, HUD Subsidized Rental Housing
Sequim**

Type/Name Elderly	Bedroom Size					Total
	0	1	2	3	4	
Section 8 Pioneer Villa Sequim		34	1			35
Total		34	1			35

**Table 16. Farmer's Home Administration Rental Projects
Unincorporated Areas**

Type/Name	Bedroom Size and Rent Range				Total
	0	1	2	3	
Family					
Clallam Bay Apts	6	20	8		34
Clallam Bay	235/255	285/310	335/365		
Total	6	20	8		34

Source: Farmer's Home Administration, 2/91

**Table 17, Farmer's Home Administration Rural Housing Activity,
Clallam and Jefferson Counties, Single Family Purchase and Repair Loans**

Program	VLI 502	LI 502	Mod 502	504	Total
1987					
Cases	3	14	1	1	19
Amount	\$155,700	\$515,220	\$7,800	\$7,500	\$686,220
1988					
Cases	3	21	1	0	25
Amount	\$152,100	\$1,042,650	\$7,550		\$1,202,300
1989					
Cases	7	25	1	3	36
Amount	\$276,430	\$1,242,800	\$4,700	\$12,600	\$1,536,530
1990					
Cases	10	29	1		40
Amount	\$503,730	\$1,487,160	\$16,670		\$2,007,560
1991 YTD, 4/91					
Cases	4	11			15
Amount	\$198,240	\$716,100			\$853,640
Total					
Cases	27	100	4	4	135
Amount	\$1,286,200	\$5,003,930	\$36,720	\$20,100	\$6,286,250

Note: Most recent Farmer's Home Administration loan activity has occurred in Clallam County. In FY 90 3 loans for a total of \$69,730 were made in Jefferson County. In FY 91 YTD 2 loans have been made for a total of \$32,410.

Source: Farmer's Home Administration, 4/91

**Table 18, Total Active Single Family Loans, Farmer's Home Administration,
Jefferson and Clallam Counties**

1988	433
1989	360
1990	356
1991	342

Note: In 1991, 116 borrowers are in Jefferson County and 226 are in Clallam County.
Source: Farmer's Home Administration, 4-91

Table 19 Clallam County Housing Authority Waiting List by Program and Household Type

	Bedroom Size				Total
	1	2	3	4	
Elderly					
Section 8	36	3	1		40
Conventional	27				27
Total	63	3	1		67
Disabled Individual					
Section 8	54	8	5		67
Conventional	33				33
Total	87	8	5		100
Family					
Section 8	1	157	131		289
Conventional	13	12	5	2	32
Total	14	169	136	2	321
Family Disabled					
Section 8	1	6	3		10
Conventional		9	2		11
Total	1	15	5		21
Grand Total	165	195	147	2	509

Source: Clallam County Housing Authority, Pacific Development Concepts, 3-91

**Table 20, Section 8 Waiting List as of February 1991
Households by Location of Current Residence, Clallam County**

	#Households	% Total HH
Incorporated		
Port Angeles	308	76%
Sequim	55	14%
Unincorporated	5	1%
Out of Town	37	9%
Total	405	100%

Source: Pacific Development Concepts/Clallam County Housing Authority

Note: 281 households of 405 meet federal preference criteria for qualification, which include paying over 50% of income for rent, displaced or homeless, or living in substandard housing. These households receive first priority when vacancies occur. Most households wait from 12 months to two years for housing. Only households meeting federal preferences are being housed through the certificate program.

**Table 21, Section 8 Waiting List as of February 1991
Households by Size of Unit Needed, Clallam County**

	#Households	% Total HH
1 Bedroom	92	23%
2 Bedroom	174	43%
3 Bedroom	139	34%
4 Bedroom		
Total Households	405	

Source: Pacific Development Concepts/ Clallam County Housing Authority

**Table 22, Section 8 Waiting List as of February 1991,
Household Composition, Clallam County**

	#Households	% Total HH
Single Head of Household	332	82%
Two Head of Household	73	18%
Total Households	405	

Source: Pacific Development Concepts/ Clallam County Housing Authority

**Table 23. Section 8 Waiting List as of February 1991
Household by Age of Head of Household, Clallam County**

	#Households	% Total HH
62+	46	11%
Under 62	359	89%
Total HH	405	100%
Disabled Households	76	19%

Source: Pacific Development Concepts/ Clallam County Housing Authority

**Table 24. Section 8 Waiting List as of February 1991
Households by Income Source, Clallam County**

	#Households	% Total HH
Wage/salary	46	11%
SSI/Pension	67	17%
Public Assistance	161	40%
Unknown	131	32%
Total Households	405	100%

Source: Pacific Development Concepts/ Clallam County Housing Authority

**The Homeless Population,
Clallam County**

The Homeless Population, Clallam County

- New homeless households have increased by 18%, new homeless individuals have increased by 28%, and even with an increase of bednights provided of 27%, the number of turnaways from sources of assistance for the homeless have increased by 9%, comparing homeless statistics for 1989 and 1990. Overall in this period, 850 households and 1,315 individuals were homeless as reported by the agencies serving homeless persons.

- Using July, 1990 to January, 1991 program statistics, the characteristics of the homeless in Clallam County are:

Families with children represent 25% of the total homeless.

Single men represent 50% of those seeking shelter.

Children represent 19% of the homeless, with the largest age groups being individuals between the ages of 18 and 44, who are 58% of the homeless seeking shelter.

The largest minority group among the homeless is native american, with white persons being the majority of homeless persons at 74%.

The four leading causes of homelessness for households were alcohol and substance abuse, domestic violence, new to area, and lack of employment and income.

**Table 25, Comparison of Selected Homeless Statistics for Clallam County
1989 and 1990**

	Jan 1989 - Dec 1989	Jan 1990 - Dec 1990	Actual Change	% Change
# New Households	719	850	131	18%
# New Individuals	1,026	1,315	289	28%
# Bednights	10,374	13,212	2838	27%
# Turnaways	126	137	11	9%

Source: Pacific Development Concepts/Community Action Agency

**Table 26, Homeless Individuals, Households, Bednights Provided, and Turnaways
Clallam County 1990**

New Households	120
New Individuals	262
Total Individuals	342
Bednights Provided	3,146
Turnaways	116

Source: Community Action Agency

**Table 27, Household Status as a Percentage of Total Homeless Households
Clallam County, July 1990-January 1991**

Household Status	Total Number	% Total HH
Single male	257	50%
Single female	105	21%
Single female w/childre	68	13%
Single male w/children	8	2%
Couple w/children	49	10%
Couple/no children	26	5%
Single youth	1	0%
Total Households	512	

Source: Community Action Agency

**Table 28, Age Composition of the Homeless Population
Clallam County, July 1990-January 1991**

Client Age	Total Number	% Total
Age 0-5	207	19%
Age 6-17	150	13%
Age 18-44	647	58%
Age 45-59	62	6%
Age 60+	48	4%
Total Individuals	146	

Source: Community Action Agency

**Table 29, Ethnic Composition of Homeless Population
Jefferson County, July 1990-January 1991**

	Total Number	% Total
Ethnicity		
Asian American	6	1%
Hispanic	26	2%
Black	50	4%
Native American	201	18%
White	828	74%
SE Asian	3	0%
Other	0	0%
Total Individuals	1,114	

**Table 30, Households by Reason for Homelessness
Clallam County, July 1990-January 1991**

	Total Number	% Total
Reason For Homelessness		
Mental Illness	83	8%
Alcohol/Substance Abus	408	38%
Employment/Income	144	13%
Eviction/Displacement	67	6%
Domestic Violence	307	28%
Family Crisis	60	6%
Runaway	1	0%
New to Area		20%
Transient		3%
Natural Disaster		3%
Medical		2%
Other		
Total	1082	

Source: Community Action Agency

Special Housing Markets

Clallam Bay

CLALLAM BAY

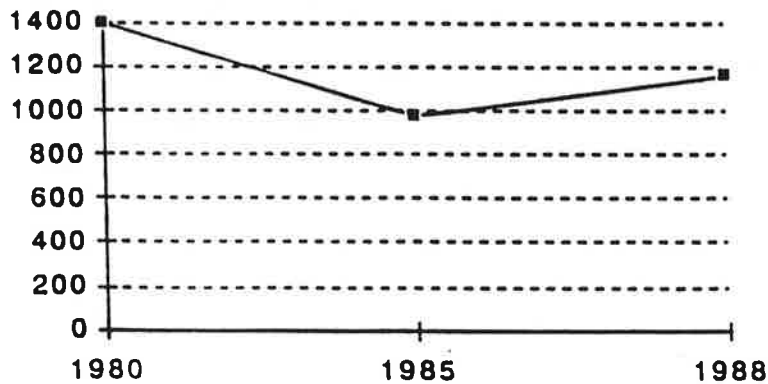
- Population and housing data in Clallam Bay are based on the 1980 U.S. Census and two separate community surveys prepared in 1985 and 1988 as part of the research study funded by the National Institute of Justice and the Clallam County Sheriff's Department¹.

Population and Housing Units

	1980	1985	1988
Population	1,398	971	1,157
Housing Units (total units)		587	547

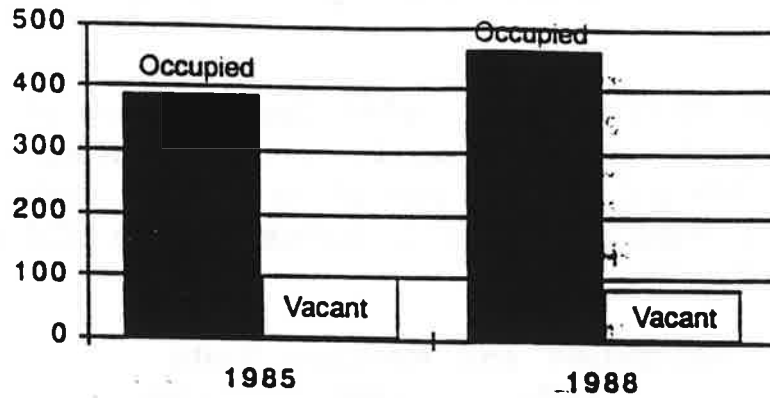
While the 1988 population is only 83 percent of the total population in 1980, it represents a 19 percent increase since 1985.

POPULATION



¹Carlson, Katherine. "The impacts of a new prison on a small town: Twice blessed or double whammy?" 1990.

HOUSING UNITS



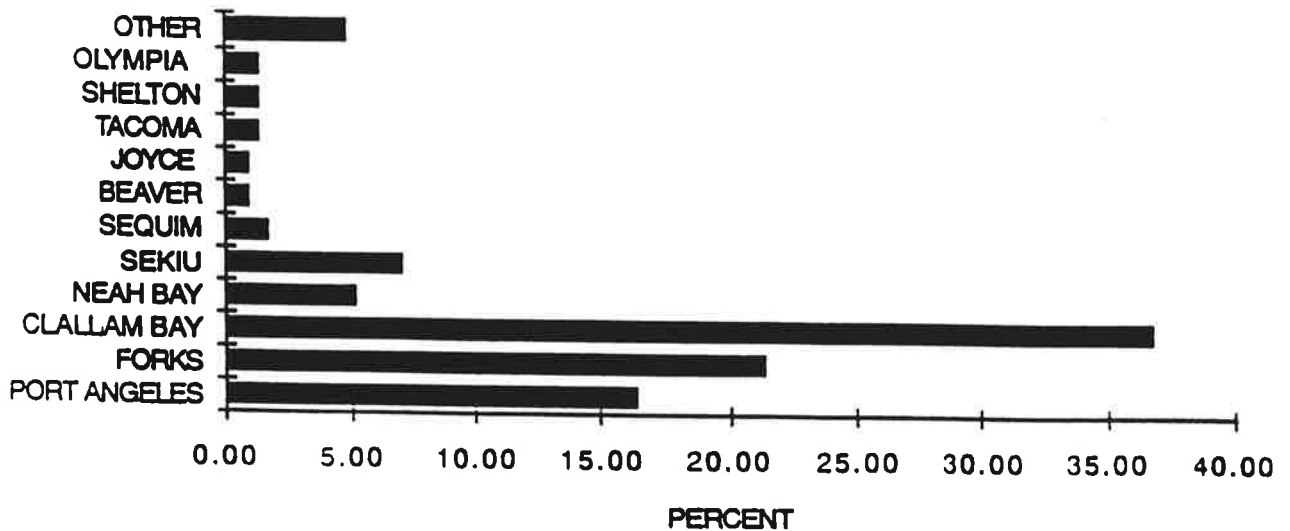
- Clallam Bay Correction Center, CBCC, is the major employer in the Clallam Bay area. In a 1988 survey, 59 percent of the CBCC employees owned their residences, while the remainder, 41 percent, rented. The majority, 56 percent, lived in houses; 31 percent lived in mobile homes; and 11 percent lived in apartments. The average monthly rent was \$317.² It is expected that housing demand patterns will be similar to the original development of the corrections facility.
- The Clallam Bay Corrections Center development involves both renovation of the existing facility and construction of a 4 story, 400-bed medium security housing unit. CBCC is the State's newest correctional facility. The first phase of the correction facility started in 1984 and became operational in 1986. The facility reached full capacity in 1988. CBCC is located approximately 1.5 miles southwest of Clallam Bay's business district and is roughly 29 miles northeast of Forks and 50 miles west of Port Angeles.
- Construction of the new phase will begin in the Spring of 1991 and is scheduled to be completed in 1992. According to the final environmental impact statement prepared for the Washington State Department of Corrections and Clallam

²Carlson, Katherine. "The impacts of a new prison on a small town: Twice blessed or double whammy?" 1990.

County, the expansion of 400 additional inmates will increase the total population of the correction facility to 970.³

- The direct staffing population, including correctional staff, technical employees and administrative personnel of this facility, will increase 98-103 employees, for a total of 370-385. The annual payroll estimated for the 100 direct jobs is approximately \$2,265,000. It is estimated that 50% of the new employees are from outside the County and will relocate to the area. Approximately 20-25 families will require housing in the Clallam Bay area and 10-15 families will locate in Forks.⁴

**RESIDENCE OF CBCC STAFF
1989 SURVEY**



Source: Draft EIS for Clallam Bay Corrections Center Expansion, 1991.

³Draft EIS for Clallam Bay Corrections Center expansion, 1991.

⁴Draft EIS for Clallam Bay Corrections Center expansion, 1991.

Native American Tribes

Population and Housing Data for Clallam and Jefferson County Native American Tribes

- There are 3,261 Native Americans in Clallam and Jefferson Counties, representing 4% of the total population of the two-county area. There are 2,695 Native Americans living in Clallam County and 566 in Jefferson County. The Native American population has increased by 28% in the two counties between 1980 and 1990.
- 57% of the Native American population lives on the five reservations in Clallam and Jefferson Counties and 48% lives off of the reservations.
- 31% of the Native American population is under the age of 16.
- The Makah Tribe has the largest housing stock with 333 units followed by the Quileute Tribe with 114 units. The Lower Elwha Tribe has 93 units, the Quinault Tribe has 64 units (the Quinault Tribe has a total for 325 units but only 64 are located in Jefferson County), the Jamestown Klallam Tribe has 61 units, and the Hoh Tribe has 33 units.
- Housing needs vary by tribe, depending on the size of the tribal population, the number of housing units on the reservation, the availability of land for new units and amounts of funding that have been and are available from the Department of Housing and Urban Development (HUD) and the Bureau of Indian Affairs (BIA).
- 32% (222 units) of the Native American-owned housing in Clallam and Jefferson Counties is in substandard condition. Of these, 156 housing units need renovation and 66 units need replacement.

- The housing assistance programs available from the Bureau of Indian Affairs provide primarily rehabilitation assistance for existing homeowners and limited assistance to purchase or construct ownership housing. Funding from HUD is available for the construction of both ownership and rental housing. Funding for all programs is limited. For example, HUD has an annual regional allocation of between 100 and 130 units to assist 22 tribes.
- 90% (300 units) of the federally assisted housing for Native Americans is ownership housing. The Makah Tribe has 22 units of subsidized rental housing and the Quinault Tribe has 10 units.
- Three to five bedroom units for families make up 90% of the federally assisted housing stock.
- Both the federal funding agencies and the tribes place a greater emphasis on the development of family housing for homeownership than on rental housing. The operating costs of federally subsidized rental housing often exceed the amount of subsidy provided, resulting in a financial impact on the tribe. In addition, homeownership provides stability and responsibility and is, therefore, important in fostering independence from government programs. Many federal and tribal representatives talked about the importance of providing "a hand-up rather than a hand-out" type of assistance.
- Following are the total number of households on the waiting lists for those tribes who manage rental housing and lease/purchase ownership housing:

Hoh Tribe	2 households
Lower Elwha Tribe	55 households
Makah Tribe	56 households
Quileute Tribe	50 households
Quinault Tribe	25 households

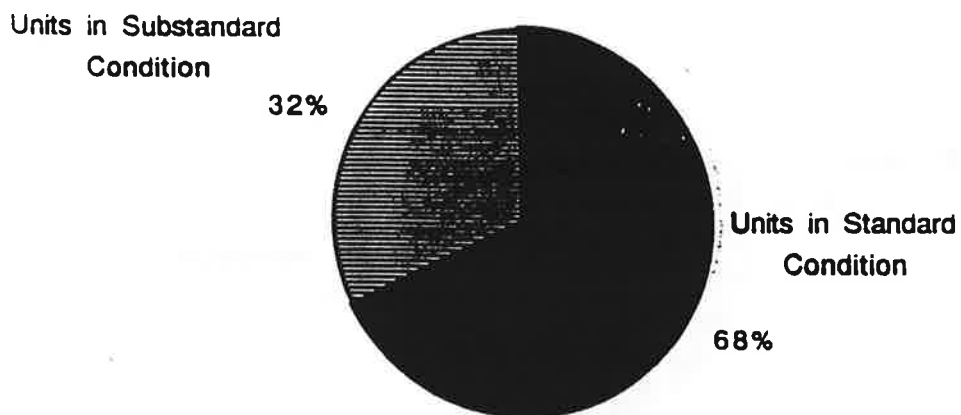
- Tribal representatives and federal officials say that the groups most in need of housing are young single individuals, predominantly males, and one and two parent families with children. Existing programs primarily serve families with annual incomes between \$10,000 and \$25,000. Rental housing for lower income individuals and families is limited, as is housing for those whose income exceeds federal program eligibility guidelines.
- The Makah Tribe has identified the need for emergency and transitional housing for single individuals and families employed seasonally in the fishing industry.
- Land ownership has been an issue in the development of tribal housing. Tribal trust lands cannot be sold and, therefore, cannot be used as collateral for private financing. This has prevented Native Americans from building or buying privately financed housing on the reservation. A new HUD insurance program, Section 248, will now provide mortgage insurance for homes built on tribal trust lands.

Distribution of Native Americans Living On and Off of Reservations in Clallam and Jefferson Counties, 1990



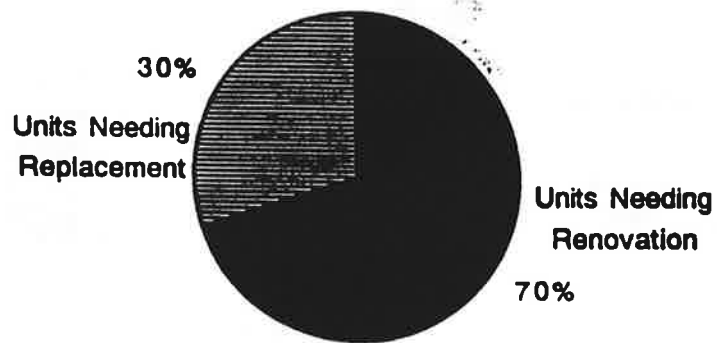
Source: Pacific Development Concepts/Bureau of Indian Affairs, 1991

Condition of Native American-Owned Housing in Clallam and Jefferson Counties, 1989



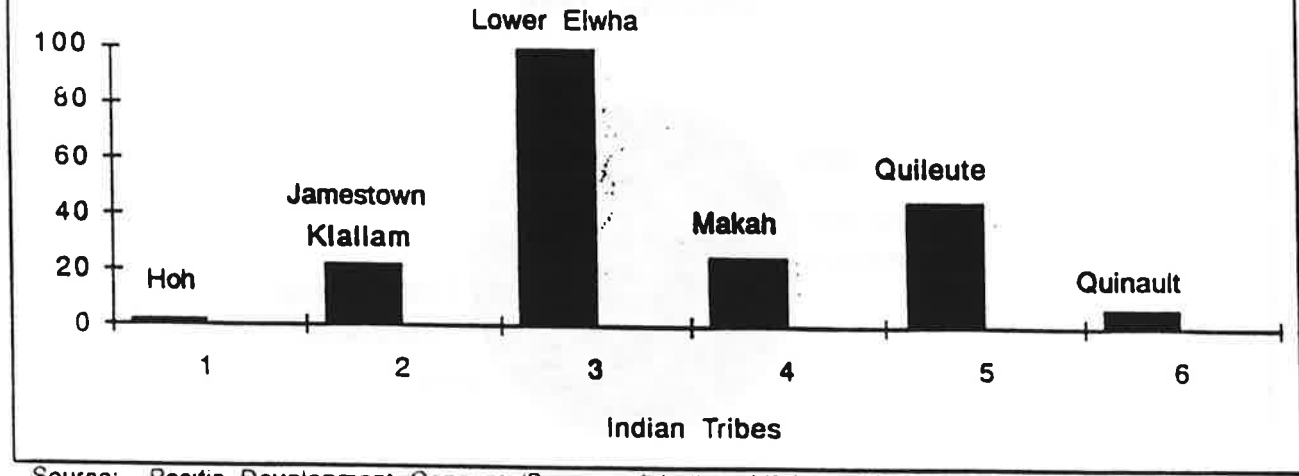
Source: Pacific Development Concepts/Bureau of Indian Affairs, 1991

**Renovation/Replacement Needs of Native American-Owned
Housing in Substandard Condition in Clallam and Jefferson
Counties, 1989**



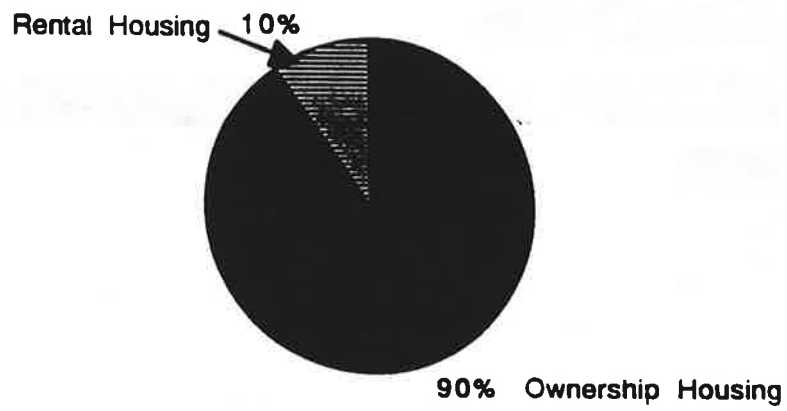
Source: Pacific Development Concepts/Bureau of Indian Affairs, 1991

**Native American Families Needing Assistance to
Replace/Purchase Their Own Home In Clallam and Jefferson
Counties, 1989**



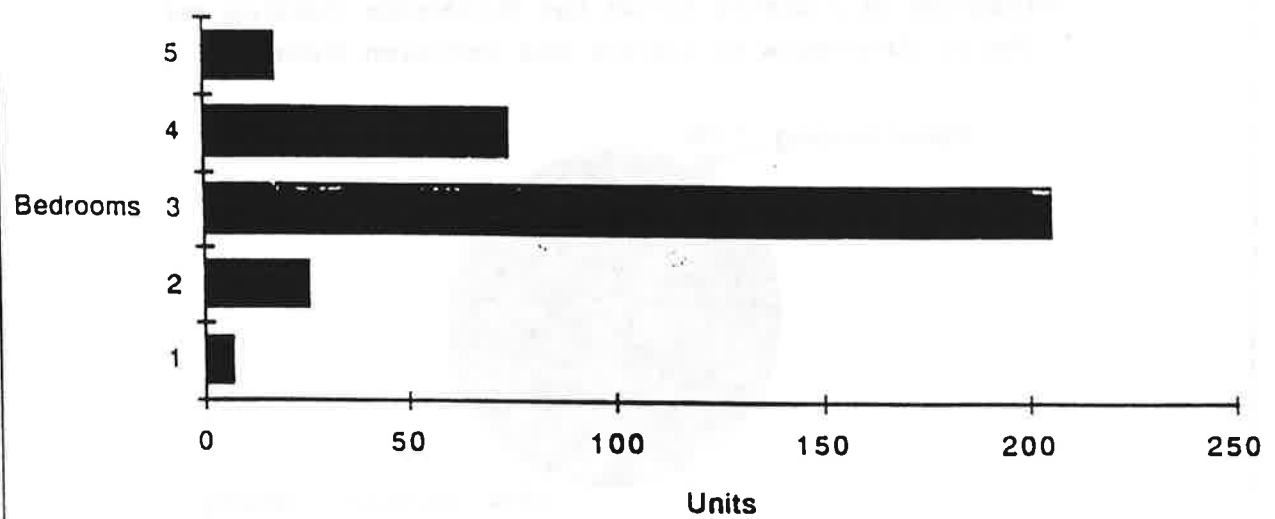
Source: Pacific Development Concepts/Bureau of Indian Affairs, 1991

Distribution of Assisted Rental and Ownership Housing for Native Americans in Clallam and Jefferson Counties



Source: Pacific Development Concepts, 1991

Number of Assisted Housing Units for Native Americans in Clallam and Jefferson Counties by Bedroom Size



Source: Pacific Development Concepts, 1991

Table 31, Population Characteristics for Clallam and Jefferson County Native Americans, 1990

Tribe	Total Population	Male	Female	Under 16	Living on Reservation	Living off Reservation
Hoh	85	38	47	32	85	0
Jamestown-Klallam	416	208	208	100	3	413
Lower Elwha	1,149	471	678	399	556	593
Makah	960	490	478	363	927	33
Quileute	784	389	396	151	596	188
Quinault	2,260	1,146	1,114	723	1,080	1,180
Total*	5,654	2,742	2,921	1,768	3,247	2,407

*Note: The totals shown here are higher than Census totals for Jefferson and Clallam Counties. These totals include Quinault Tribal members living in Grays Harbor County. Data was not available separately for the Quinault populations in Jefferson and Grays Harbor Counties.

Source: Bureau of Indian Affairs, Population and Labor Force Report

Table 32, Housing Inventory for Jefferson and Clallam County Native Americans, 1989

Tribe	Existing Housing Units	Units in Standard Condition	Units in Substandard Condition	Units Needing Renovation	Units Needing Replacement	Families Needing Own Home	New Housing Units Required
Hoh	33	30	3	1	2	0	2
Jamestown-Klallam	61	41	20	17	3	19	22
Lower Elwha	93	59	34	17	17	83	100
Makah	333	254	79	63	16	9	25
Quileute	114	48	66	43	23	22	45
Quinault	64	44	20	15	5	2	7
Total	698	476	222	156	66	135	201

Source: Bureau of Indian Affairs

Table 33, Housing Inventory, Hoh Tribe, 1989

	# Housing Units	% Total Units
Units/Standard Condition	30	91%
Units/Substandard Condition	3	9%
Units Needing Renovation	1	3%
Unit Needing Replacement	2	6%
Total Housing Units	33	

Source: Bureau of Indian Affairs

Table 34, Housing Inventory, Jamestown Klallam Tribe, 1989

	# Housing Units	% Total Units
Units/Standard Condition	41	67%
Units/Substandard Condition	20	33%
Units Needing Renovation	17	28%
Unit Needing Replacement	3	5%
Total Housing Units	61	

Source: Bureau of Indian Affairs

Table 35, Housing Inventory, Lower Elwha Tribe, 1989

	# Housing Units	% Total Units
Units Standard Condition		
Units/Substandard Condition	59	63%
	34	37%
Units Needing Renovation		
Unit Needing Replacement	17	18%
	17	18%
Total Housing Units	93	

Source: Bureau of Indian Affairs

Table 36, Housing Inventory, Makah Tribe, 1989

	# Housing Units	% Total Units
Units/Standard Condition	254	76%
Units/Substandard Condition	79	24%
Units Needing Renovation	63	19%
Unit Needing Replacement	16	5%
Total Housing Units	333	

Source: Bureau of Indian Affairs

Table 37, Housing Inventory, Quilleute Tribe, 1989

	# Housing Units	% Total Units
Units/Standard Condition	48	42%
Units/Substandard Condition	66	58%
Units Needing Renovation	43	38%
Unit Needing Replacement	23	20%
Total Housing Units	114	

Source: Bureau of Indian Affairs

Table 38, Housing Inventory, Quinault Tribe, 1989

	# Housing Units	% Total Units
Units/Standard Condition	44	69%
Units/Substandard Condition	20	31%
Units Needing Renovation	15	23%
Unit Needing Replacement	5	8%
Total Housing Units	64	

Source: Bureau of Indian Affairs

**Table 39, Assisted Housing for Native Americans
Clallam and Jefferson Counties, 1990**

Tribe	Homeownership				Total	Rental Units					Total
	2 BR	3 BR	4 BR	5 BR		1 BR	2 BR	3 BR	4 BR	5 BR	
Hoh	0	17	1	1	19	0	0	0	0	0	0
Lower Elwha	0	23	10	3	36	0	0	0	0	0	0
Makah	11	103	46	9	169	7	7	4	4	0	22
Quileute	8	39	6	3	56	0	0	0	0	0	0
Quinault	0	15	5	0	20	0	0	5	3	2	10
Total	19	197	68	16	300	7	7	9	7	2	32

Source: Lower Elwha Housing Authority, Makah Housing Authority, Quileute Housing Authority, and Quinault Housing Authority

**Table 40, Distribution of Assisted Rental and Ownership Housing for Native Americans
Clallam and Jefferson Counties, 1991**

Unit Type	# Units	% Total
Rental Units	32	10%
Owner Units	300	90%
Total Units	332	

**Table 41, Distribution of Assisted Housing Units for Native Americans by Bedroom Size
Clallam and Jefferson Counties, 1991**

	# Units	% Total
1 Bedroom	7	2%
2 Bedroom	26	8%
3 Bedroom	206	62%
4 Bedroom	75	23%
5 Bedroom	18	5%
Total Units	332	

Data Sources

**SELECTED POPULATION, ECONOMIC, AND HOUSING DATA
JEFFERSON-CLALLAM HOUSING NEEDS STUDY, 1991**

CLALLAM COUNTY - NOTES AND SOURCES OF DATA

<u>Item</u>	<u>Source Note No.</u>	<u>Source References and Notes</u>
Population and Households		1. US Department of Commerce, Bureau of Census. Summary of General Population Characteristics:1980.
Population	1,2	
Unincorporated	1,2	2. WA State Office of Financial Management (OFM) Revised April 1, 1990 Population of Cities, Towns and Counties. 3/13/91
Incorporated	1,2	
Forks	1,2	
Port Angeles	1,2	
Sequim	1,2	3. Washington State and County Housing Data Base 3/89.
Total		4. University of Washington Institute for Public Policy and Management, regression estimates. Not available for Cities. Replace with 1990 Census Data when available.
Households	3,4	
Owner Households	3,4	
Renter Households	3,4	
Household Size	2,3	
Age Distribution	5	5. WA State OFM: State and County Populations by Age and Sex: 1980-2000, August 1989.
00-19	5	
20-29	5	6. US Department of Commerce, Bureau of Census. 1990 Census, Population by Race and Hispanic Origin, April,1,1990
30-39	5	
40-64	5	
65-74	5	
75+	5	

Race				
	White	1,6		7. WA State OFM: 1990 Population Trends for Washington State, August 1990, Table 6.
	Black	1,6		
	Indian, Eskimo & Aleut	1,6		8. Pacific Development Concepts Analysis of Department of Housing and Urban Development, Farmer's Home Administration, State Housing Finance Commission and Public Housing Authority Data, 4/91.
	Asian and Pacific Islander	1,6		
	Other	1,6		
	Hispanic Origin	1,6		9. Assessor's data, Jefferson and Clallam Counties, compiled 3/91, analyzed and summarized by Pacific Development Concepts and Planning Departments, not available for 1980.
Housing Units				
	Total Units	7		
	Single Family Units	7		
	Multi-Family Units	7		
	Mobile Home Units	7		10. Clallam County Assessed Valuation by School District 1981-1990, Pacific Development Concepts, Clallam County Assessor.
Assisted Units				
	Owner	8		
	Renters	8		11. US Department of Commerce, Bureau of Census. Summary of General Housing Characteristics:1980.
Persons in Group Quarters				
		1,2		12. THE DIGEST of Real Estate Sales and Loans, Summary of Clallam County Real Estate Sales, Average Price-Used Single Family 5 Acres or Less for 1990.
Occupied Units				
		1,2		
Vacant Units				
		1,2		13. Pacific Development Concepts Calculation based on 90% LTV Ratio, 360 payments, fixed rate mortgage at 12.41% interest rate (9.91% for 1990), 13% of value added for taxes, and \$250/yr. insurance. Affordability ratio is equivalent to 28% of Gross Household Income.
Housing Condition and Valuation				
Single Family Housing Condition		9		
School District Assessed Value 000's		10		14. Russ Mellon Estimate, Census Data out in 1991 will have a 1990 Contract Rent.

Owner Characteristics			
Owner Households	4, 11		15. Pacific Development Concepts Calculation Based on the Median Contract Rent, plus, \$50/month for utilities. Affordability ratio is equivalent to 30% of Gross Household Income.
Median Home Value	11, 12		
Income Needed to Afford Average Home	13		16. US Department of Commerce, Bureau of Census. Income Characteristics in 1979 for Counties, Table 180.
Renter Characteristics			
Renter Households	11, 14		17. US Department of Housing and Urban Development (HUD) Office of Economic Affairs, Economic and Market Analysis Division, January 2, 1990.
Median Contract Rent	11		18. Income Assistance, Social Services, and Medical Assistance, WA State Department of Social and Health Services, October, 1990 (Not Available fo 1980).
Rental Vacancy Rate	11		
Income Needed to Afford Average Rent	15		19. WA State Employment Security Department, Labor Market and Economic Analysis Branch, 1991.
Income Characteristics			
Household Income	16		20. Jefferson Clallam Community Action Agency - from shelter statistics.
	> \$5,000	16	
	\$5,000 to \$7499	16	
	\$7,500 to \$9,999	16	
	\$10,000 to \$14,999	16	
	\$15,000 to \$19,999	16	
	\$20,000 to \$24,999	16	
	\$25,000 to \$34,999	16	
	\$35,000 to \$49,999	16	
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Clallam County
Economic Trends

Background Report
For Clallam/Jefferson County
1991 Housing Needs Assessment

Prepared By
Pacific Development Concepts
April, 1991

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Forestry and Related Industries continues to influence the region

Any discussion concerning the economy and health of Jefferson County and the Peninsula Region must consider the conditions affecting the forest industry. The most productive forest land in the United States is located on the Olympic Peninsula. This timber has been the mainstay of employment opportunities for the majority of persons living in the area.

In Clallam County, forest product employers produce a variety of different products. ITT-Rayonier is a major exporter of logs as well as an operator of a large mill in the County. Daishowa America purchased the Crown Zellerbach plant in Port Angeles and invested \$50 million in modernization equipment to compete in foreign markets.

Despite the attempts to modernize and diversify, the lumber and wood products jobs in Clallam County have continued to decline. To provide new jobs, planners are placing high hopes on diversification through value-added manufacturing. Value-added manufacturing refers to any improvement to raw logs. For example, the manufacture of two-by-four's has added value as does manufacturing of furniture parts or fencing systems. The Washington Employment Security Department reports that jobs in this sector declined 28 percent between 1980 and 1989.

The listing of the northern spotted owl as an endangered species has greatly reduced the amount of land available for commercial timber production. In addition, legislation limiting the export of raw logs by 75 percent to foreign markets has placed the timber industry and local jurisdictions in Clallam County, which depend heavily on timber cutting revenues, in an economic crisis. Coupled with the national slump in lumber products has

Clallam County Economic Trends

Introduction

The purpose of this report is to provide an overview of the economic trends in Clallam County. This background report is prepared as part of the 1991 Clallam County Housing Needs Assessment Report.

Economic data for the County and the peninsula region is available principally through the Washington State Employment Security Department, Port of Port Angeles, and Clallam County Economic Development Council.

A brief population and economic profile

Between 1970 and 1980, Clallam County population grew nearly twice the rate of growth for the rest of the state during the same period. Of this growth, most occurred in the County's incorporated areas of Port Angeles, Forks and Sequim.

Between 1980 and 1990, the County grew and at significantly slower rate. This slower rate of growth may be attributed to declines in economic activity, particularly in the timber and related industries. The county's population in 1980 was 51,648, representing a 48.5 percent growth over the previous decade. In 1990, the population of Clallam County totaled 56,464, representing a 9 percent growth in 1980's. Clallam County growth during this period was substantially slower than the rest of the counties throughout the state. By contrast, the population of the state of Washington totaled 4,660,700 in 1990, an increase of 16.11 percent from 1980.

Sequim- Port Angeles Corridor

In east Clallam County, jobs will continue to be located along the Sequim-Port Angeles corridor. Port Angeles is the largest city in the county and will continue to be the manufacturing center and is the westernmost harbor in the Puget Sound region. The Daishowa plant in Port Angeles currently produces one-tenth of Japan's domestically produced paper and paperboard.³

Fastest growing retirement community

Sequim will continue to attract business and services that support retired households and is the fastest growing retirement community on the peninsula.

A proposed major destination resort

This activity will be complemented by the proposed major development of a destination resort on Miller Peninsula by Peninsula Partners, a subsidiary of Mitsubishi Corporation. The developers will submit development proposals to the County in April, 1991, for a planned recreational community and begin the permit process. Developers will attempt to provide a housing product similar to those being produced in the Sequim, Kala Point and Pt. Ludlow areas. Ground breaking is anticipated to commence in 24 months with housing units available for occupancy in the summer of 1994. Development of the project will likely be phased over a 20-25 year period. Preliminary planning includes the development of single family and attached housing to be built in phases. The exact mix of housing has not been set.

³Clallam County Economic Development Council, Investor's guide to Clallam County.

caused prices to increase and demand for lumber products to decline.

The Northwest Policy Center of the University of Washington has projected that between 8,000 and 16,000 jobs will be lost in Washington State's wood products industry because of the spotted owl habitat designations and other impending reductions in timber supply.¹ Despite attempts to diversify, it is unlikely jurisdictions in rural areas will be able to successfully diversify in the short term. It is more likely that the recent events negatively effecting the timber industry will be felt through year 2000.

Trends In Occupational Structure

Clallam County is a study of contrast and change. Clallam County's eastern portion is experiencing growth in service and health related industries, while the western portion, historically dependant on natural resource based industries, is experiencing the work force shifting to other industries.

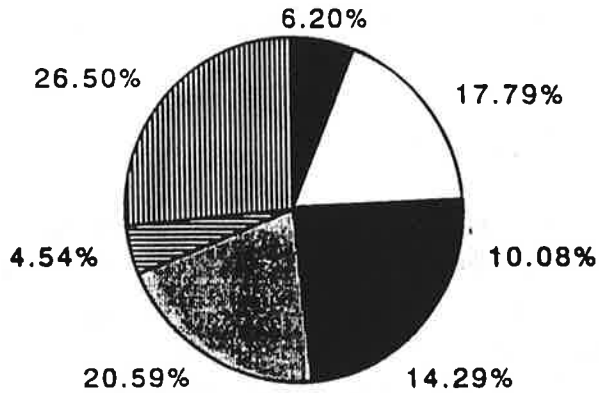
Clallam Job Base

Between the years 1988-1993, the number of jobs in the Clallam-Jefferson region will increase by 1,800 jobs, or 8.3 percent.² Jobs in the two county area will continue to concentrate in the existing and emerging employment centers. In 1989, the major industrial employers in Clallam County included ITT Rayonier, Daishowa America, K-Ply, Rogerson Hiller Corp., Hoh River Logging/Cedar, Portac and Sea Farm Washington.

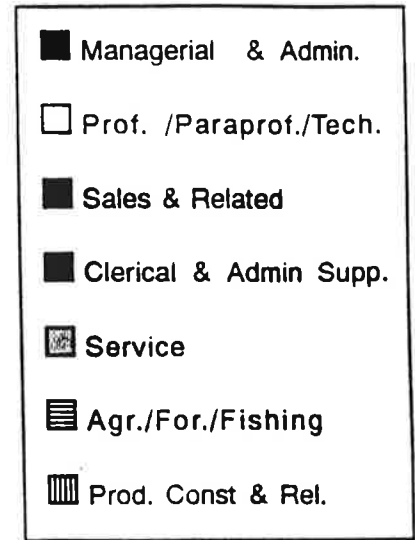
¹ Evergreen Community Development Assoc. Olympic Peninsula Region Diversification Strategy, November, 1990.

² Washington State Employment Security, Occupational Projections 1988 - 1993.

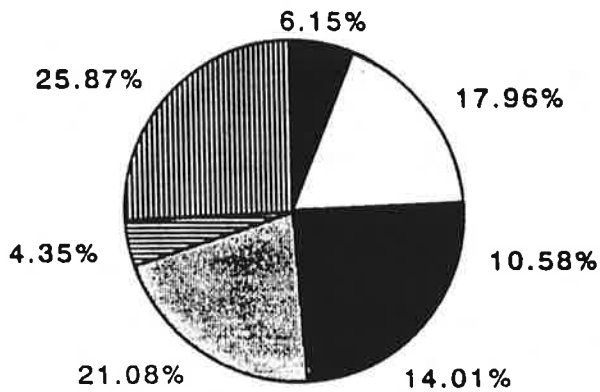
**CLALLAM-JEFFERSON COUNTIES
EMPLOYMENT BY OCCUPATIONS
1988**



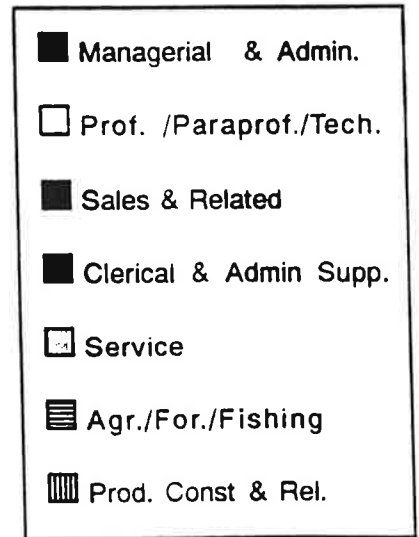
Source: Washington State Employment Security



**CLALLAM-JEFFERSON COUNTIES
EMPLOYMENT BY OCCUPATION
1993**



Source: Washington State Employment Security



In Clallam-Jefferson Counties, the resident civilian labor force totaled 31,300 in 1989, 29,270

Carlsborg

Situated between Sequim and Port Angeles, along Highway 101, is a 70 acre industrial park improved for light manufacturing, distribution and research facilities. In 1990, water service was added to the site making the site attractive for new investment in the County.

West Clallam County

Employment opportunities in the western portion of the County are principally related to forestry, fishing, tourism and public sector activity. The two employment centers are located in Forks and Clallam Bay. In Forks, over 75 percent of the jobs in the area are associated with the wood-products industry.

The largest employer in Clallam Bay is the Clallam Bay Correction facility (CBCC). The facility was built in 1988 and reached capacity in the same year. Construction will begin in the Spring of 1991 to expand the facility, adding an additional 400 beds. Upon completion, the facility is expected to employ up to 385 persons.

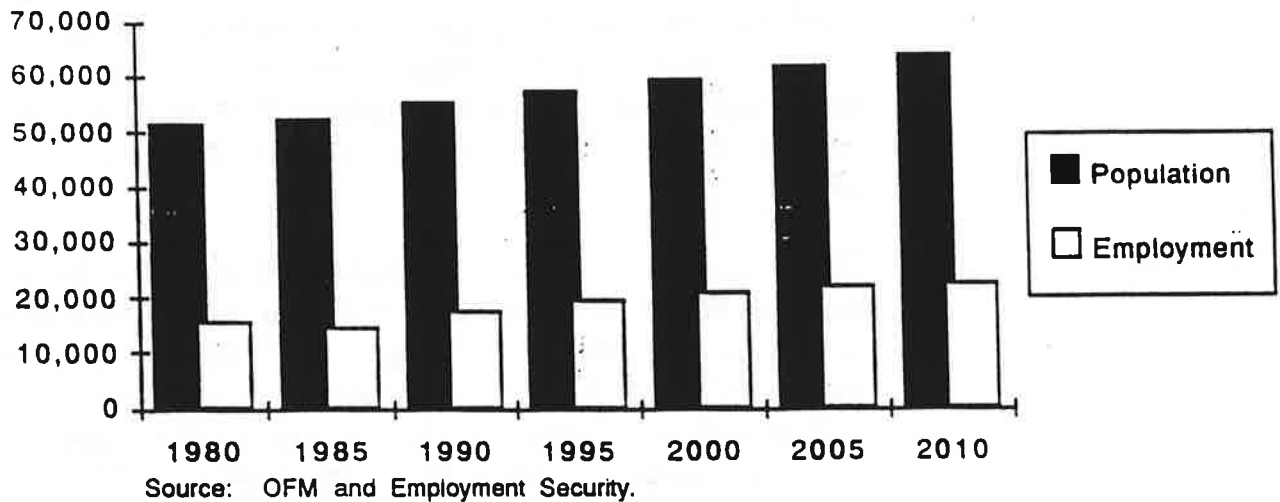
Occupations in manufacturing will continue to be a significant source of employment; Service and sales occupations are growing.

The following chart compares the composition of the employment force between 1988-1993. Comparison of the charts suggest despite the growth in service and sales occupations, the production, construction, and manufacturing occupations will continue to be dominant employment sectors in Clallam-Jefferson Counties.

related the the changes in the demographic make up of the region.

The following Chart shows the relationship of population and employment over a 10 year period and is forecasted an additional 20 years. Growth in the labor force will continue follow population growth and will expand at a modest rate in the 1990's.

**CLALLAM COUNTY
POPULATION AND EMPLOYMENT FORECAST
1980-2010**



The health of the County continues to depend on the natural resource and manufacturing industries

Clallam County's economy has been dominated by the natural resource and manufacturing industries. As with the rest of the nation, manufacturing jobs are declining and will continue to do so while employment in the service sector industries increase in relation to the overall labor force.

The manufacturing sector will grow at a very slow pace between 1988-1993 and is expected to add a mere 70 jobs to the work force. The number of

were employed while 2,030 were unemployed. The labor force growth between 1980 and 1989 was faster than population growth, an increase of 15 percent. The Washington State labor force totaled 2,441,300 in 1989, a 22 percent increase from 1980.⁴

Labor Force Trends

Nationally, during the 1970's and early 1980's, there was a significant growth in the labor force as the baby boom generation and women joined the labor force. By Mid 1980's, the labor force grew at slower rate. Both the State of Washington and the Clallam-Jefferson Counties have followed this national trend. In the 1990's the labor force in Washington will continue to grow at a slower rate and most growth will concentrate in the Puget Sound region.

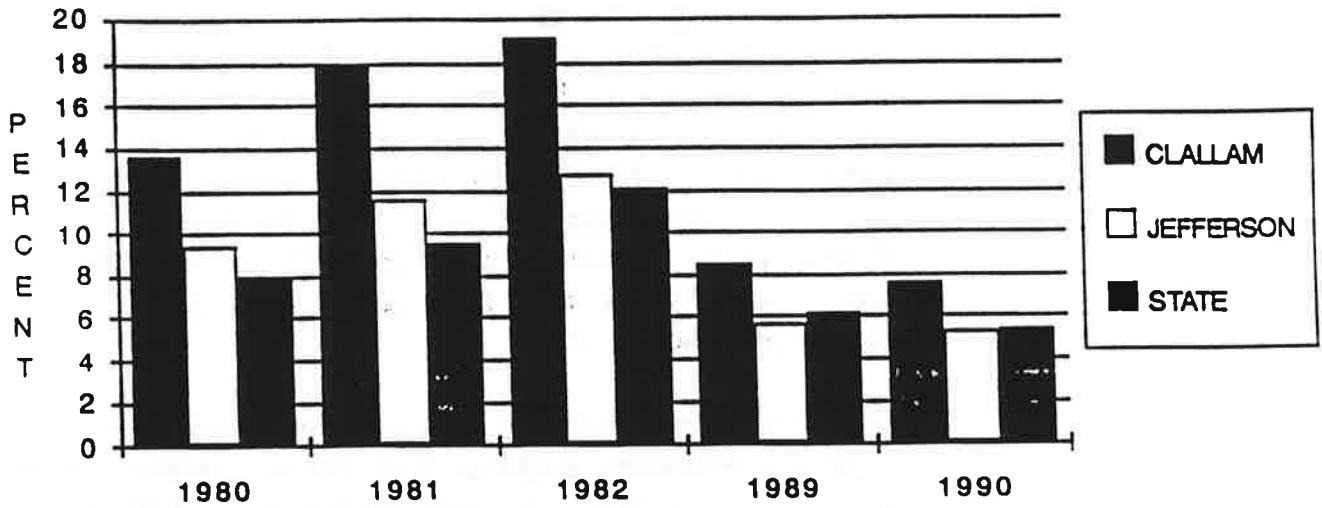
There will be a decline throughout the region in the number of 16-24 year olds, the age of workers that generally fill entry-level jobs. Despite the decline in the number of young workers, a labor shortage is not expected. Rather, it can be expected to see older workers will seek entry level jobs. This trend of older workers re-entering the work force and a shift from forestry and related industry jobs to service related jobs will cause business and government to invest in training and retraining programs to assist the labor force in employment opportunities from unskilled to skilled labor positions.

Historically, the labor force growth in the Clallam-Jefferson County region has paralleled the population growth in the area. This trend changed in the 1980's, when labor force grew at a rate slightly faster than the rate of population growth. The trend in the labor force will continue to be

⁴ Washington State Employment Security, Occupational Projections 1988 - 1993.

that throughout the 1980's, unemployment rates in Clallam County have been higher than the state. The following Chart compares selected unemployment rates of the State, Clallam and Jefferson Counties.

Comparison of Selected Unemployment Rates



Source: Washington State Employment Security

Wages

The following Chart summarizes the average hourly rate paid to workers in different industries.

service jobs will increase by approximately 700 jobs, a 10 percent increase between 1988-1993.⁵ According to State forecasts, most of the new jobs will be in hotel and motel services, educational services, and medical services.

Additional training programs will be necessary

As the service sector grows as part of the area's new job formation, additional education will be essential to retrain those in the forestry and manufacturing related jobs seeking employment in the service area. Retail trade will be the fastest growing sector in the area, adding approximately 600 new jobs, a 12 percent increase between 1988-1993.⁶ Restaurant, grocery stores, and retail stores will lead the growth in this sector. Examples of miscellaneous retail stores include drug stores, book stores, jewelry stores and sporting goods stores.

Forecasts regarding the general health of Clallam County's economy suggest that the moderately slow recovery from the recession of the early 1980's will continue in the 1990's, although the rate of growth will be slightly higher. The area is expected to continue to grow at a slower rate than the state of Washington.

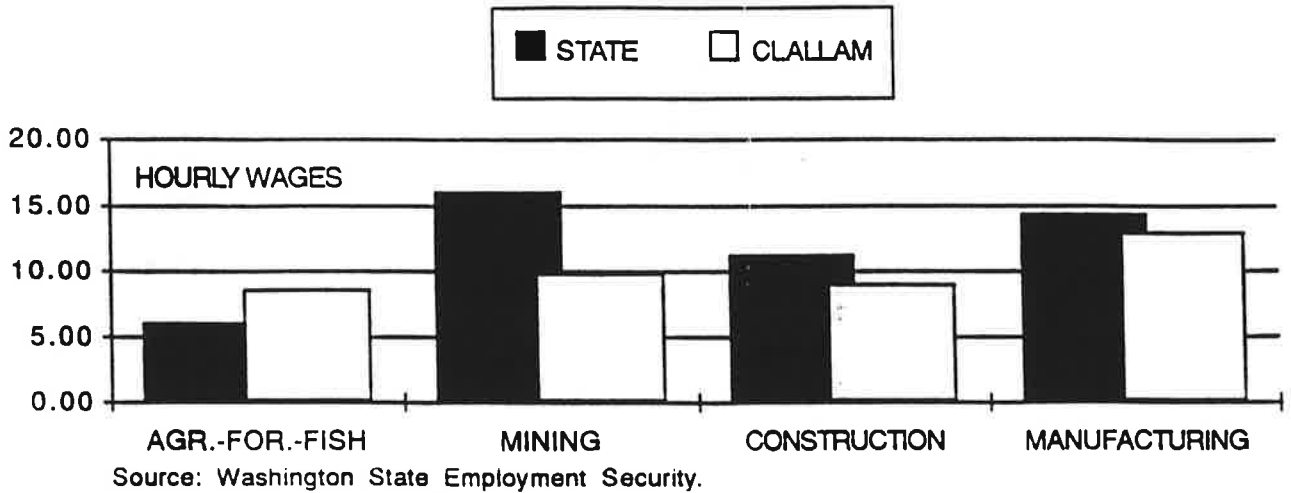
Unemployment

The unemployment rate is often used as an indication of an area's health and is used for historical comparisons. In the early 1980's both the state and the region experienced a recessionary period. In 1980 the unemployment rate was 13.8 percent. By the end of the 1980's both the state and the region showed signs of recovery and expansion. By 1990, the unemployment rate had declined to 7.6 percent. It is interesting to note

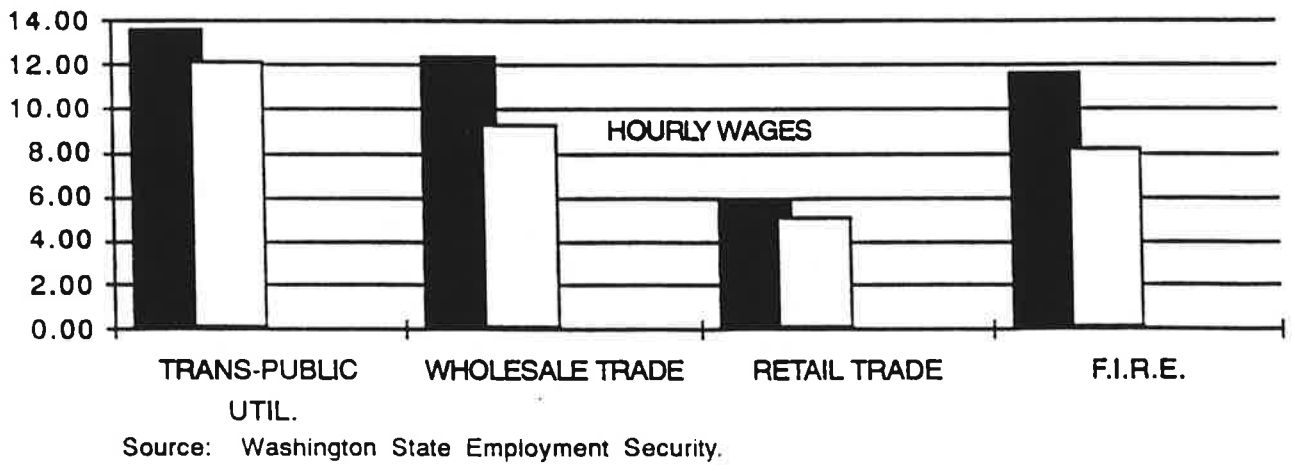
⁵ Washington State Employment Security, Occupational Projections 1988 - 1993.

⁶ Washington State Employment Security, Occupational Projections 1988 - 1993.

**CLALLAM COUNTY
ANNUAL AVERAGE HOURLY WAGE BY INDUSTRY
1989**



**CLALLAM COUNTY
ANNUAL AVERAGE WAGE BY INDUSTRY
1989**



**COVERED EMPLOYMENT AND WAGES
CLALLAM COUNTY
1989**

<u>INDUSTRY</u>	<u>HOURLY RATE</u>
Agric. Fishing	\$8.51
Mining	\$9.77
Construction	\$9.07
Manufacturing	\$12.88
Trans. and Pub. Utilities	\$12.14
Wholesale Trade	\$9.34
Retail Trade	\$5.11
F.I.R.E.	\$8.19
Services	\$5.43
Government	\$10.07
Total	\$8.55

Source: Washington State Employment Security.

In all industry categories, except agriculture, forestry and fishing industries, hourly wages paid in Clallam County are less than the average wage paid statewide. The lower average wages paid are attractive to business expansion and new business investment. The following three Charts compare Clallam County and State annual average hourly rates paid by industry in 1989.

Overall, the gradual shift from forest and manufacturing industries to service and related industries is likely to decrease employee wages. In addition, service and related industries are typically non-unionized. As a result, service and related industry jobs often do not offer benefits such as health insurance to their workers.

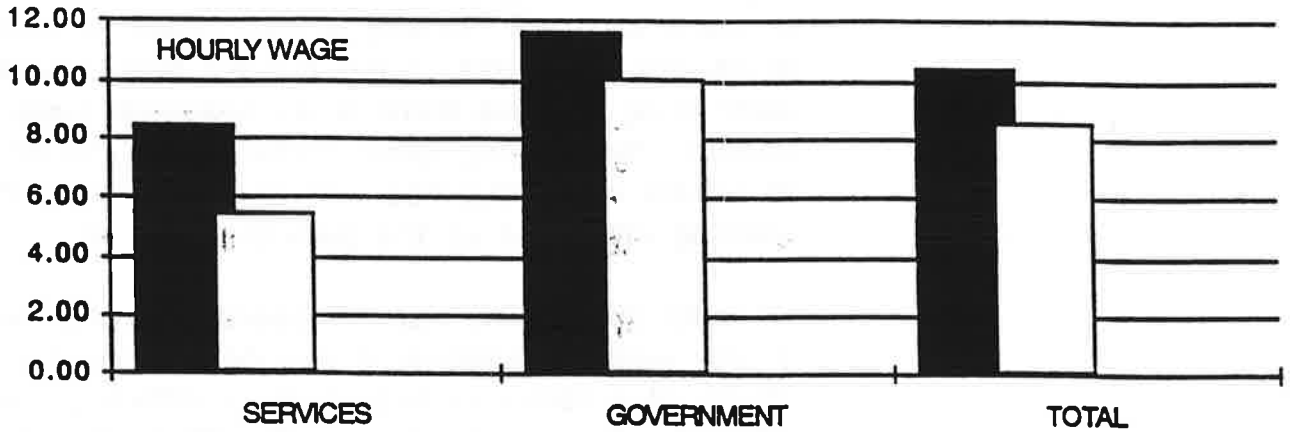
Affordability

A key question related to the overall economic health of any region is whether there is sufficient supply of housing present and infrastructure to produce sufficient housing in the future at costs which are affordable to the current and projected labor force. Unless there is an adequate supply of housing for working labor force, it will be difficult to attract new industries and sustain growth in the existing industries of the peninsula region.

Housing affordability can be described many ways. In the simplest measure, it can be described as the ability of a family or individual to afford adequate housing. As a general rule, affordable housing is obtained if 30 percent or less of household income is spent on direct housing expenses including monthly payments and utilities.

The following chart lists the fastest growing occupations in Clallam-Jefferson Counties between 1988-1993. As employment opportunities move from manufacturing occupations to service and related occupations, housing affordability decreases for persons working in the fastest growing occupational fields.

**CLALLAM COUNTY
ANNUAL AVERAGE HOURLY WAGE BY INDUSTRY
1989**



Source: Washington State Employment Security.

Income

Income levels are often used to assess the economic health of an area. The national trend toward greater reliance on investment income (dividend/interest/rent) has been very strong in Clallam County. Transfer payments and investments accounted for 26 and 24 percent of the county's personal income.⁷

Per capita income for the Clallam-Jefferson County area followed the State trend. Clallam County figures have averaged about 90 percent of the state figures. In 1990, the per capita income was \$14,142, a 50 percent increase over the 1980 figure of \$9,402. However, as the economy shifts over time from manufacturing and forestry and related industries to service and related industries, it is expected the rate of increase in per capita income to grow more slowly. This can partly be explained by the shift from higher paying jobs to lower paying service and related jobs.

⁷Clallam County Economic Development Council, Investor's guide to Clallam County.

This equates to approximately \$17,784 annually for a single wage earner. Assuming a wage earner is willing to spend up to 30 percent of this income for housing expenses, the average wage earner could afford to spend \$444 per month. A closer look at the occupational fields indicated that there is a significant difference in the hourly earnings within occupational fields.

Affordability is greatest in the manufacturing industry

Wages paid in the manufacturing industry was highest in the county, paying an average \$12.88 per hour. The manufacturing occupations averaged hourly wages 51% higher than the average hourly wage for the entire labor force. Assuming a wage earner is willing to spend up to 30 percent of this income for house expenses, the wage earner in the manufacturing sector could afford to spend \$669 per month.

Fastest growing occupations are the lowest paid

By contrast, the fastest growing occupations are in the service and retail trade industries. The service industry and retail trade industry pays workers 64 percent, and 60 percent, respectively, of the average hourly wage paid the overall labor force.

Access to affordable housing will be most difficult for persons working in lower paying occupations

The average person in the service industry can afford to pay approximately \$282 per month for housing (1989 figures). The largest industry within this sector is the hotel and other lodging, followed by health services.

Similarly, the average person in the retail trade industry can afford to pay \$265 per month for housing (1989 figures). Eating and drinking

**FASTEST GROWING OCCUPATIONS
CLALLAM-JEFFERSON COUNTIES
1988-1993**

<u>Occupation</u>	<u>Percent Growth 1988-1993</u>
Child Care Workers	20.00
Communication, Transportation and Utility Operations Managers	20.00
Lawyers	20.00
Medical Secretaries	20.00
Social Workers, Medical and Psychiatric	20.00
Cooks, Short Order	16.70
Other Food Service Workers	16.70
Sales Persons, Parts	16.70
Other Sales and Related	16.70
Social Service Technicians	16.70
Other Transportation and Related Workers	16.70
Bus Drivers	16.70
Salepersons, Retail	16.70
Stock Clerks, Sales Floor	15.00
Registered Nurses	14.60
Cooks, Specialty Fast Foods	14.30
Hosts and hostesses, Restaurant	14.30
Hotel Desk Clerks	14.30
Housekeepers	14.30
Library Asistants and Bookmobile Drivers	14.30
Physical and Life Science Techs	14.30
Education Administrators	12.50
Forest and Conserv. Workers	12.50
Teachers	12.50
Cashiers	12.30
Waiters and Waitresses	12.20

(Based on occupations of more than 50 employed.)

Source: Washington State Emp. Sec., Occupational Projections 1988-1993.

In 1989, the average hourly wage paid to all covered employees in Clallam County was \$8.55.⁸

⁸Washington State Employment Security, Employment and Payrolls in Washington State by County and Industry, 1989 Annual Averages.

establishments and food stores are the largest industries within this sector.

In summary, the trends of declining manufacturing jobs and the growth in the service, retail trade and other lower paying jobs, will likely place additional pressure on the already significant demand for lower priced housing in the area throughout the county.

