

Douglas County, Washington

Population Allocation, Housing Needs, and Residential Land Capacity Analysis Memo



Prime Contractor:



Subcontractor:



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Executive Summary:

This study serves as a foundational step in updating Douglas County's comprehensive plan, with a focus on ensuring the county's housing supply aligns with projected population growth over the next two decades. The core purpose is to evaluate whether the current urban and rural zoning regulations and land availability can accommodate the expected housing demand from 2027 to 2046.

By analyzing projected population growth, estimating housing demand, and comparing that to the existing land inventory, the study aims to identify potential gaps or surpluses in housing that could arise from the current zoning landscape. This document details the assumptions, and the methodology adopted to derive the results of this study.

The table below compares the total housing demand vs the total estimated housing supply that the region can support based on the current zoning of the land. Regions where the estimated supply is likely to meet the projected housing demand are Rural Douglas County, Mansfield UGA, Waterville UGA, and Bridgeport UGA. The three regions in which the estimated housing supply does not meet the future housing demand are East Wenatchee UGA, Rock Island UGA, and Coulee Dam UGA.

Table 0.1 Future Housing Demand vs. Supply, 2027-2046

Region	Total Demand (No. of Housing Units)							Total Supply (No. of Housing Units)	Supply Meets Demand?
	0-30% AMI	30-50% AMI	50-80% AMI	80-100% AMI	100-120% AMI	120%+ AMI	Total (All Income Levels)		
Rural Douglas County	0	0	211	95	4	598	908	21,064	Yes
East Wenatchee UGA	847	819	993	493	335	1,738	5,225	4,348	No
Bridgeport UGA	12	12	14	7	2	21	68	1,009	Yes
Rock Island UGA	193	186	226	111	67	377	1,160	296	No
Waterville UGA	1	1	1	0	0	0	3	292	Yes
Mansfield UGA	2	2	2	1	0	0	7	37	Yes
Coulee Dam UGA	1	1	1	1	1	3	8	0	No

Source: Housing for All Planning Tool Method C; WCRER Housing Permit Data; HUD Area Median Incomes; HUD Fair Market Rents; Douglas County Land Services Department Data, 2024

The study will serve as a tool for proactive planning, enabling the county to make data-driven decisions regarding zoning, infrastructure, and policy changes to support growth.

This document is produced by Points Consulting in collaboration with Douglas County Land Services staff, presenting the revised and enhanced edition of BERK Consulting's Douglas County Population Allocation and Land Capacity Memo produced in 2023.

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List of Acronyms

AMI	Area Median Income
BPA	Bonneville Power Association
DUA	Dwelling units per acre
FEMA	U.S. Federal Emergency Management Agency
FMR	Fair Market Rent
GMA	Growth Management Act
HAPT	Housing for All Planning Tool
HB 1220	House Bill 1220
HUD	U.S. Department of Housing and Urban Development
LCA	Land Capacity Analysis
OFM	Washington State Office of Financial Management
UGA	Urban Growth Area
WCRER	University of Washington Center for Real Estate Research

Douglas County Zoning Districts

AC-10	Commercial Agriculture Zoning District
AC-5	Commercial Agriculture Zoning District
A-D	Dryland Agriculture Zoning District
RR-2	Rural Resource Zoning District
RR-5	Rural Resource Zoning District
RR-20	Rural Resource Zoning District
R-REC	Rural Recreation Zoning District
RSC	Rural Service Center Zoning District

East Wenatchee UGA Zoning Districts

R-L	Residential Low Density Zoning District
R-M	Residential Medium Density Zoning District
R-H	Residential High Density Zoning District
M-U	Mixed Use Zoning District

Rock Island UGA Zoning Districts

R-L	Low Residential Zoning District
M-R	Recreation Mixed Use District

Bridgeport Zoning Districts

R-1	Single-Family Low Density Zoning District
R-2	Mixed-Family Medium Density Zoning District
R-3	Multifamily Residential Zoning District

Coulee Dam Zoning Districts

R1	First Residential Zoning District
R2	Second Residential Zoning District

- R3 Third Residential Zoning District
- SR Special Residential Zoning District

Mansfield Zoning Districts

- R1 Single-family Zoning District
- R2 Multi-family Zoning District

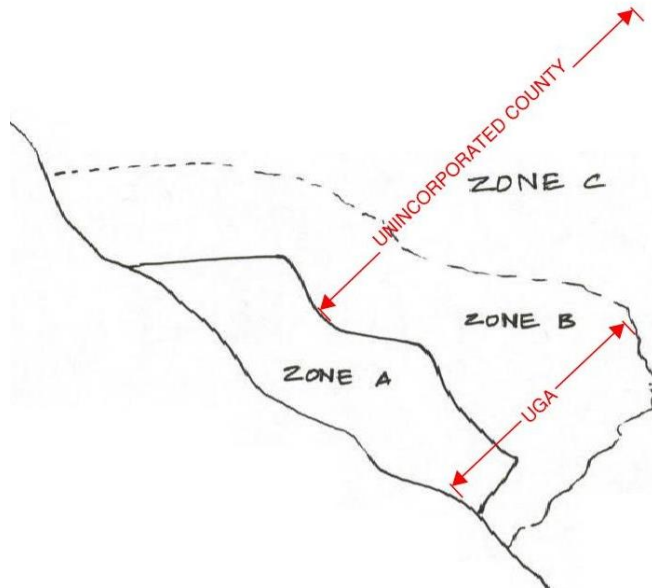
Waterville Zoning Districts

- R-1 Residential Single-Family Zoning District
- R-2 Residential Multifamily Zoning District

Important Notes

1. As defined by the Washington State Department of Commerce, the Urban Growth Areas (UGA) consist of both the area within the city limits as well as Unincorporated UGA surrounding the city limits. See the illustration below. Therefore, for the purpose of this memo, UGA is understood to include both the area within the city limits as well as the surrounding unincorporated urban growth area, unless noted otherwise.

Figure 0.1 An Illustration of Urban Growth Area and Rural Douglas County



Source: Douglas County Land Services Department

Zone A: UGA, within City Limits
 Zone B: UGA, Unincorporated
 Zone C: Rural Douglas County (excluding UGA)
 Zones A + B = UGA

2. For the purposes of this memo, "urban" is synonymous with "Urban Growth Areas" or Zone A+B as indicated above. Similarly, "rural" is synonymous with "Rural Douglas County" or Zone C as denoted above.
3. It is important to note that this study is not a result of a parcel-by-parcel analysis. The results of this study may contain some margin of error due to limitations of the data sources available. For instance, a parcel of land that appears to be vacant and available for development whose improvement value was found to be less than \$10,000, may already be developed. This and other such discrepancies in the data may exist for reasons such as impending data updates, errors in data samples etc.

1. Introduction

Douglas County is in the process of updating its Comprehensive Plan to account for population growth expected between 2027 and 2046. This report outlines the first step in the process undertaken by Douglas County to ensure sufficient land is available for future housing demands, based on projected population growth and corresponding housing demand of all income-segments through 2046. The county's planning process follows these key steps:

- **Population Projection for 2046:** The Washington State Office of Financial Management (OFM) provides population projections for 2046, which are essential for planning and making land use decisions.
- **Population Growth Distribution:** The Douglas County Regional Council utilizes these estimates and distributes the population growth that the county expects to see from 2020 to 2024, to different geographical regions, such as Urban Growth Areas (UGAs) and rural areas of the county, ensuring balanced distribution.
- **Future Housing Demand:** Utilizing the Housing for All Planning Tool (HAPT) from the Washington State Department of Commerce, the county determines the housing needs for all income levels within the allocated regions. This helps to ensure that housing is available for all demographic groups, considering varying levels of affordability.
- **Land Inventory and Estimated Housing Supply:** To accommodate the future housing demand, this report provides an inventory of land that includes vacant, re-developable, and underutilized parcels. This inventory is crucial in identifying land that could potentially meet this future housing demand. The parcels are assessed within different geographical areas of the county, such as Urban Growth Areas (UGAs) and rural regions. The land is evaluated based on its ability to support housing development for various income levels. It considers the potential for the land in each zoning district to contribute to affordable, moderate-income, and market-rate housing.
- **Comparing Future Housing Demand and Estimated Housing Supply:** The future housing demand and the estimated housing supply are then compared to identify any shortages or surpluses of land that may be available in the planning period (2027-2046) to accommodate affordable, moderate income and market-rate housing.

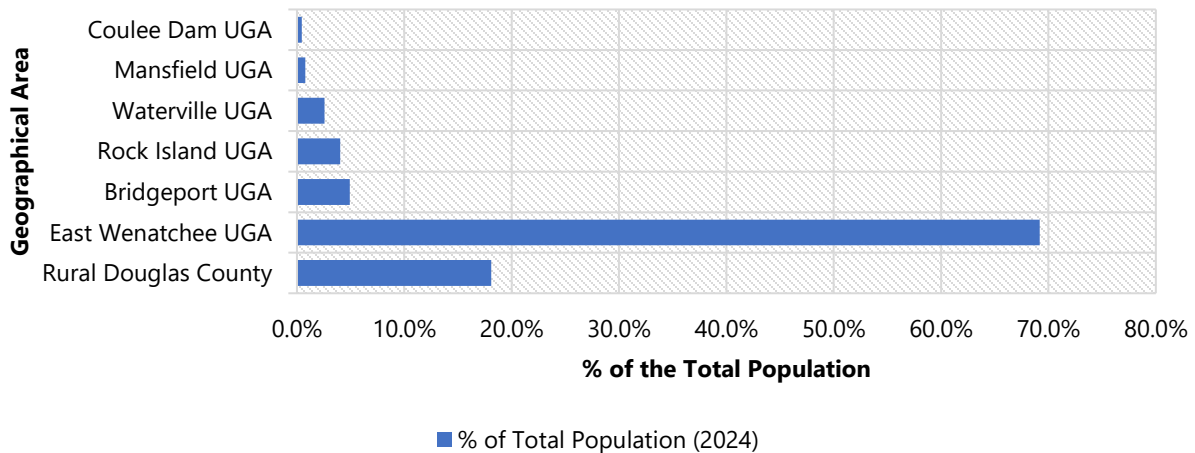
This approach helps the county plan strategically and efficiently, ensuring that future growth is well-supported by available land and resources. By following this methodology, the county aims to proactively address population growth and ensure adequate land is available for future housing development, thus supporting sustainable community growth and addressing the diverse needs of its population. The findings of this study will be further utilized to inform the update of the *Land Use* as well as other components of the Comprehensive Plan.

2. Population Estimates, Trends and Projections

2.1. Population Estimates, 2024

In the year 2024, the total county population is estimated at 45,150. Of this total population, nearly 18.11% of the population is estimated to reside in Rural Douglas County. Approximately 69.18% of the population resides in the East Wenatchee UGA, 4.91% of the population resides in Bridgeport UGA, 4.02% of the population resides in Rock Island UGA, 2.57% resides in Waterville UGA, 0.77% resides in Mansfield UGA and 0.44% resides in Coulee Dam UGA. See [Appendix A](#) for reference.

Figure 2.1 Percent Share of Total County Population by Geographical Areas, 2024



Source: Small Area Estimates Program – Urban Growth Area Population Estimates, Washington State Office of Financial Management

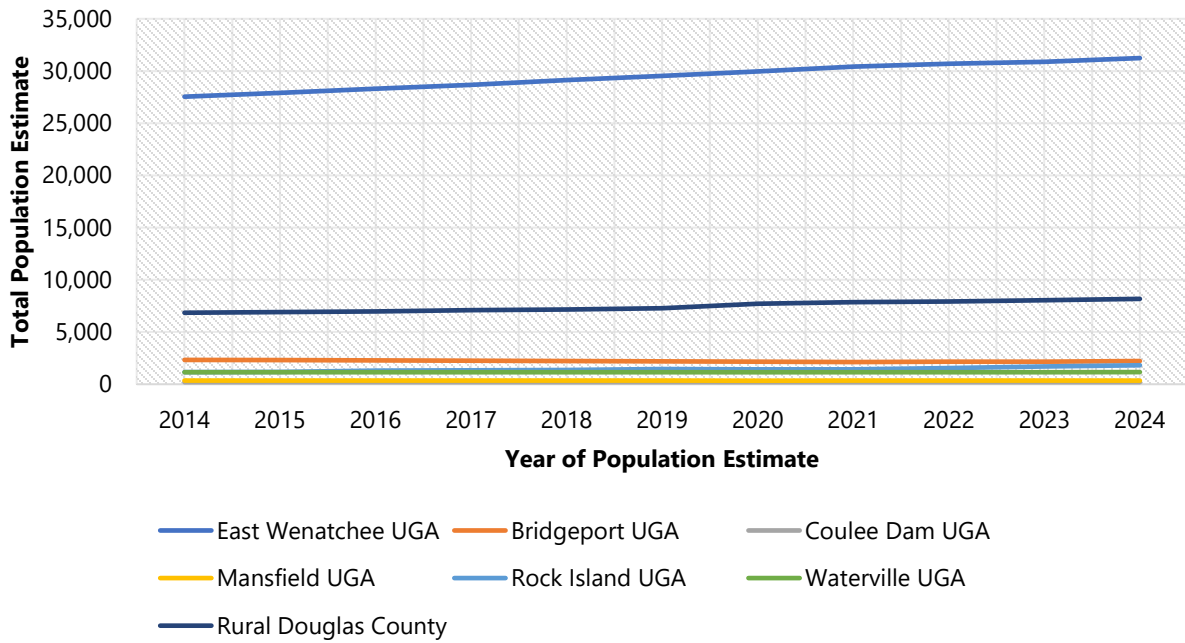
2.2. Population Growth Trends: 2014 to 2024

In the year 2014, the total county population was estimated at 39,557. Of this total population, nearly 17.31% of the population was estimated to reside in Rural Douglas County. Approximately 69.62% of the population resided in the East Wenatchee UGA, 5.89% of the population resided in Bridgeport UGA, 2.93% of the population resided in Rock Island UGA, 2.91% resided in Waterville UGA, 0.85% resided in Mansfield UGA and 0.49% resided in Coulee Dam UGA.

Overall, the County's population increased by 14.14% between 2014 and 2024. East Wenatchee UGA and Rock Island UGA were the major growth contributors within this decade. East Wenatchee UGA experienced a population growth of 3,679 (13.42% increase) and Rock Island experienced a population growth of 656 (56.51% increase). Figure 2.2 below depicts the estimated population for the rural and urban areas of the county from 2014 to 2024. See [Appendix A](#) for reference.

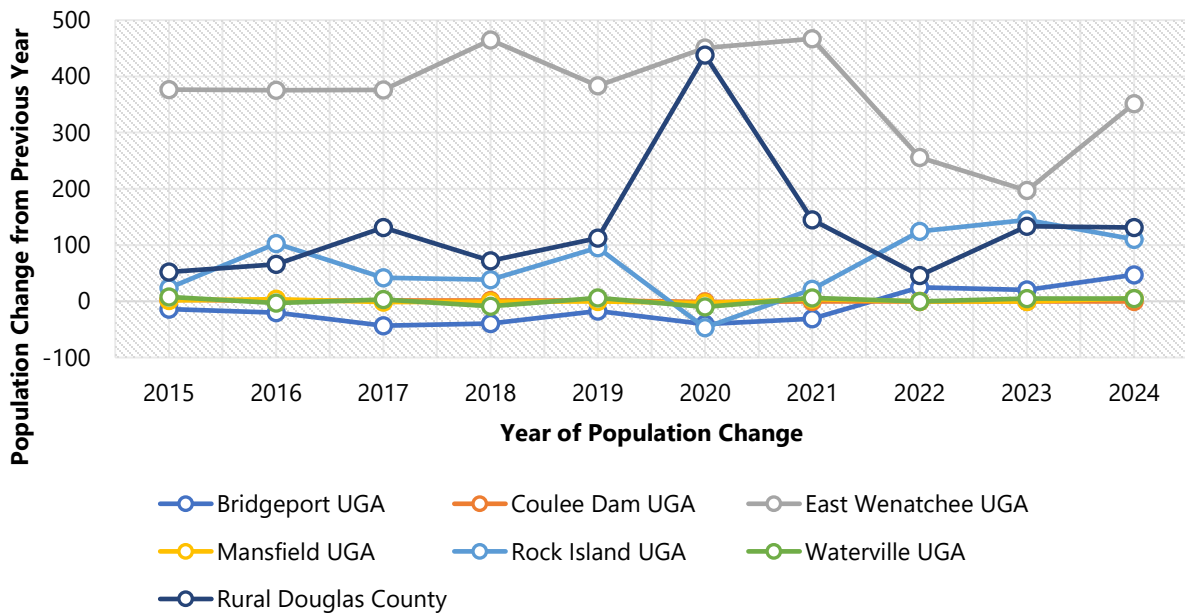
Figure 2.3 and Figure 2.4 depict population change, in absolute numbers and percentages, respectively, from the previous year over a decade (2014-2024) for the Rural Douglas County and the Urban Growth Areas. See Table A.2, Table A.3, Table A.4 and Table A.5 for reference.

Figure 2.2 Douglas County Urban and Rural Area Population Estimates, 2014-2024



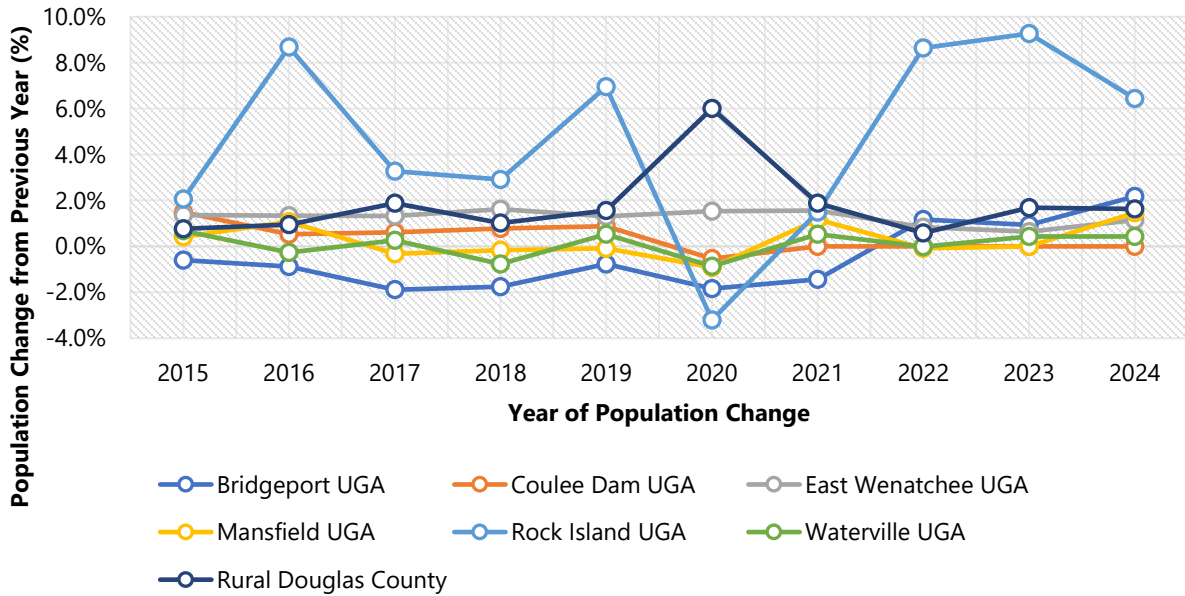
Source: Small Area Estimates Program – Urban Growth Area Population Estimates, Washington State Office of Financial Management

Figure 2.3 Population Change Across Douglas County, 2014-2024



Source: Small Area Estimates Program – Urban Growth Area Population Estimates, Washington State Office of Financial Management

Figure 2.4 Population Change (% Share of Total Population) Across Douglas County, 2014-2024

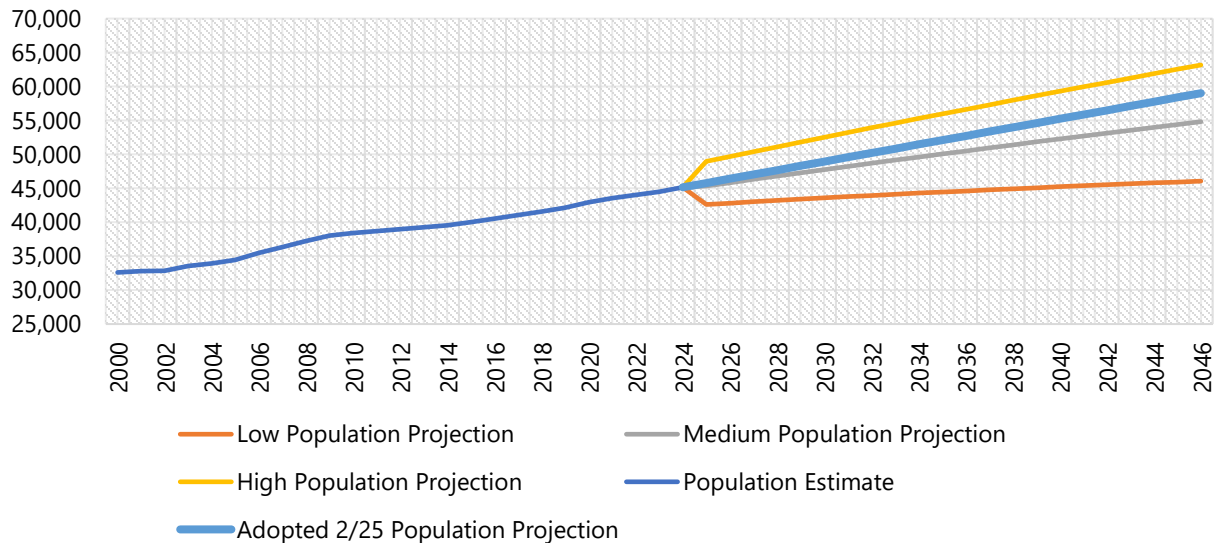


Source: Source: Small Area Estimates Program – Urban Growth Area Population Estimates, Washington State Office of Financial Management

2.3. Population Projection 2046

Figure 2.5 shows the projected population of Douglas County for 2046, noting the high, medium, and low targets as provided by Washington State Office of Financial Management. On February 25th, 2025, the Douglas County Regional Council adopted a new population projection target of 59,000 residents by 2046, set between the medium and high OFM projection series. See Table A.6 for reference.

Figure 2.5 Population Estimates and Projections for Douglas County, 2000-2046

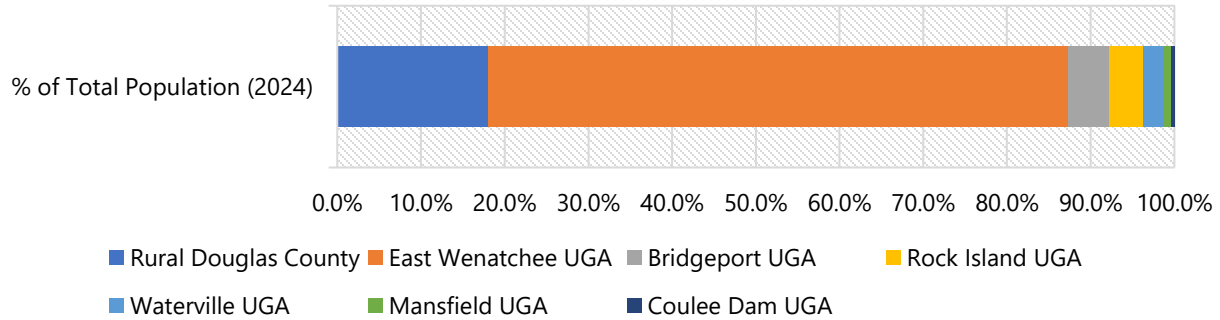


Source: Washington State Office of Financial Management, Small Area Estimate Program, 2023

2.4. Population Share in Urban Growth Areas and Rural Douglas County

Figure 2.6 depicts the 2024 population estimates by region, noting that 81.89% of the Douglas County residents live in the Urban Growth Areas (UGAs), while approximately 18.11% reside in the rural county. See Table A.1 for reference.

Figure 2.6 Douglas County Population Share by Geographical Areas, 2024



Sources: Washington State Office of Financial Management (Small Area Estimate Program 2024); Douglas County Comprehensive Plan 2021

2.5. Population Growth Allocation

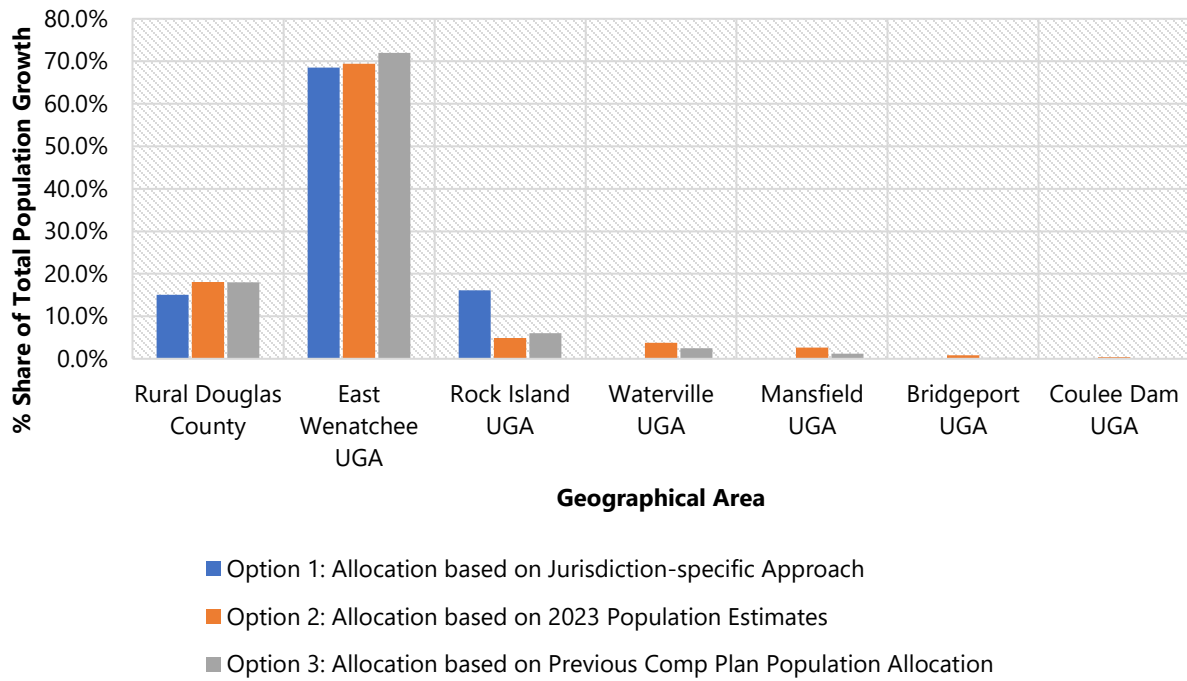
Douglas County Regional Council was tasked with distributing the projected population growth to both urban and rural areas of the county. The options provided for allocating population growth are represented in Figure 2.7 below, which shows the different ways in which the population could be distributed between urban growth areas and rural areas over the planning period 2027 to 2046.

The Regional Council chose to plan for the medium population targets for 2046, as provided by the Office of Financial Management (OFM). The medium population target projects a total population of 54,806 in for Douglas County in year 2046. The three options for population distribution are explained below:

- **Option 1:** The population allocations in Option 1 are based on each jurisdiction’s willingness to accommodate future growth. With this option, Douglas County Regional Council took a flexible, jurisdiction-specific approach to population distribution considering how much growth each urban or rural area is prepared to support based on various factors such as infrastructure capacity, zoning and land use policies etc.
- **Option 2:** This option allocates population based on each jurisdiction’s share of the 2023 countywide population, assuming each jurisdiction will support the same share of the countywide population in 2046.
- **Option 3:** This option allocates population according to the shares from the previous comprehensive plan, assuming these shares will remain relevant through 2046.

See Table A.7 for reference.

Figure 2.7 Population Growth Allocation Options for Douglas County (2027-2046)



Source: Washington State Office of Financial Management, Small Area Estimates Program, 2023; Douglas County Countywide Comprehensive Plan 2021

Of the three options presented to the Douglas County Regional Council, the Council decided to allocate population based on Option 1 on July 17th, 2023, but with a slight amendment to add 1.0% to Bridgeport UGA and subtract 0.5% each from Rock Island UGA and Rural Douglas County. The new population allocation growth distributions were adopted by the Regional Council on March 10th, 2025. The population allocated to the urban and rural areas of the county are as follows:

Table 2.1 Population Growth Allocation adopted by Douglas County Regional Council in March 2025

Geographical Area	Population Allocation (% of Total County Population Growth)
Bridgeport UGA	1.00%
Coulee Dam UGA	0.10%
East Wenatchee UGA	68.50%
Mansfield UGA	0.15%
Rock Island UGA	15.60%
Waterville UGA	0.10%
Rural Douglas County	14.55%
Total	100.00%

Source: Douglas County Land Services Department

3. Future Housing Demand

Using the population allocation adopted by the Douglas County Regional Council on March 10th, 2025, the future housing needs were calculated using Housing for All Planning Tool. This tool is a product of Washington State House Bill 1220 (HB 1220), a revision of the Growth Management Act (GMA). The tool is intended to assist counties in planning for growth to account for housing needs for different income levels that will accompany that growth. Using the Washington State Office of Financial Management (OFM) GMA population projections for 2046, housing needs are broken down by percentage share of the Area Median Income (AMI) using three different methods. On March 10th, 2025, the Douglas County Regional Council adopted HAPT Method C, which is reflected in the tables and figures of this report.

Allocation Method C:

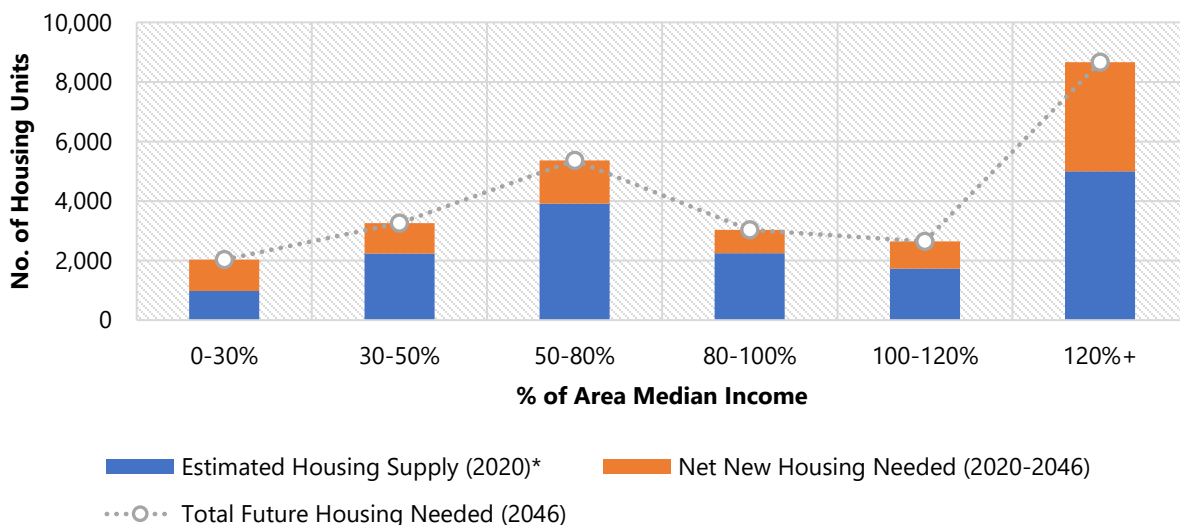
- All low-income housing is allocated to UGAs
- Rural areas are allocated a larger share of higher income housing, while UGAs are allocated a smaller share of higher income housing as compared to Method A.

In this case, HAPT Method C is used to calculate housing needs for both urban and rural areas of the County. The County and the cities are required to use the same method of housing needs allocation to ensure that all the housing needed to accommodate the population growth in Douglas County is accounted for.

3.1. Housing Demand by Income Level, 2020-2046

The HAPT model estimates the future housing demand (2020-2046) of all urban and rural areas of the county. This demand is based on the population allocation percentages as adopted by the Douglas County Regional Council on March 10th, 2025. Figure 3.1 represents the future housing demand of the entire county from 2020 to 2046. See Table B.1 for reference.

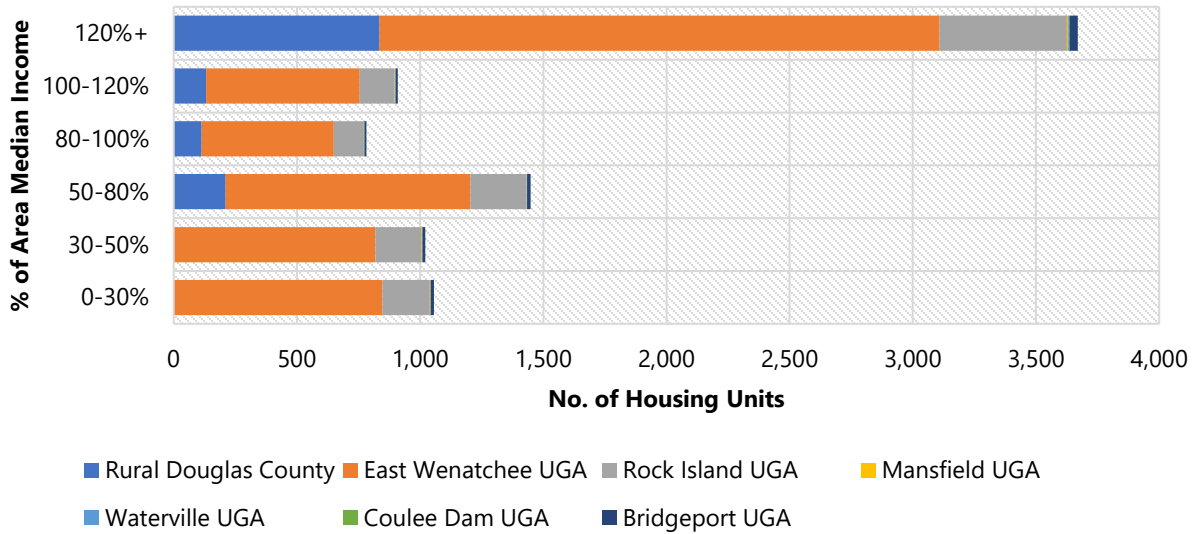
Figure 3.1 Countywide Housing Demand by Income Level, 2020-2046



Source: *Housing for All Planning Tool, Washington State Department of Commerce*

Figure 3.2 depicts the housing demands of the county by each region and income level. See Table B.2 for reference.

Figure 3.2 Housing Demand by Region and Income Level (% of Area Median Income), 2020-2046



Source: Housing for All Planning Tool, Method C, Washington State Department of Commerce

3.2. Estimated Housing Supply by Income Level and Region, 2020-2026

The Comprehensive Planning update covers a 20-year growth period. However, the HAPT model produces housing demand estimates for 2020-2046. To ensure that planning occurs for the twenty-year growth period, housing supply is estimated for the years 2020 to 2026. These housing supply estimates (2020-2026) are then deducted from the estimated housing demand (2020-2046) to estimate the housing demand for the twenty-year period of 2027-2046.

The calculation of housing supply estimates for the period 2021-2026 is based on the housing permit data from the University of Washington’s Center for Real Estate Research (WCRER).

3.2.1. Residential Permits Issued, 2021-2023

The housing permit data from the University of Washington’s Center for Real Estate Research (WCRER) reflects the number of housing permits issued by local jurisdictions and their respective permit values from 2021 to 2023. The values of the housing units were estimated using the permit values.

3.2.2. Estimating Housing Supply, 2024-2026

A three-year moving average of the total number of dwelling units built in 2021-2023 is used to forecast the number of units to be built in the next year. This moving average is then applied as follows: 2021-2023 for 2024 estimates, 2022-2024 for 2025 estimates, and 2023-2025 for 2026 estimates.

3.2.3. Estimating Housing Supply, 2021-2026

Figure 3.3 depicts the total housing supply by affordability levels that is estimated to be built in the county from year 2021 to 2026. See Table B.1 for reference. The graph shows that majority of housing built in the county from 2021 to 2026 is likely to be built in the Rural Douglas County, East Wenatchee UGA and Rock Island UGA.

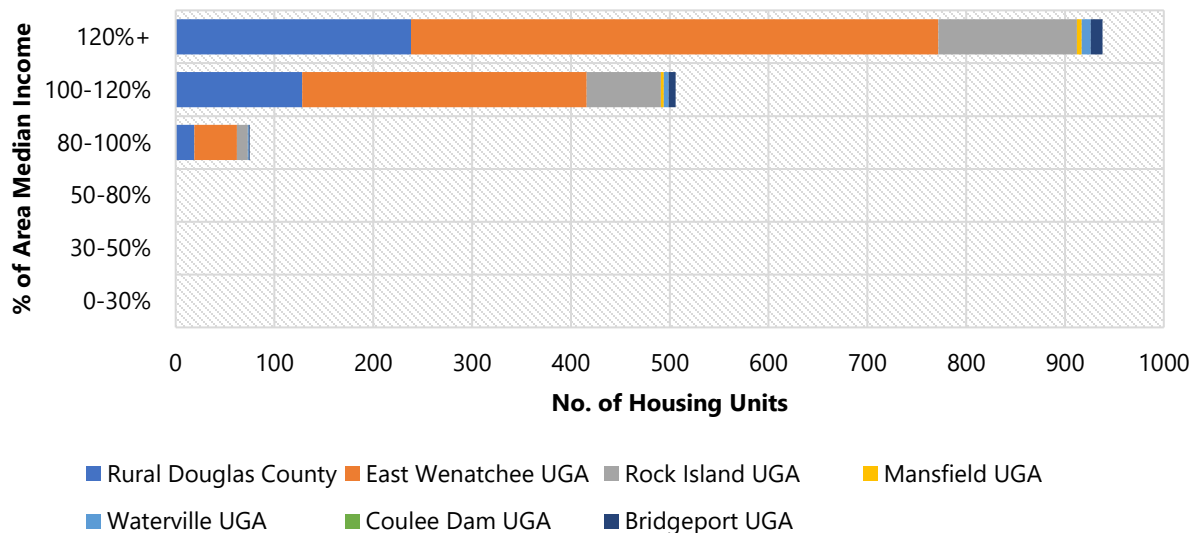
3.2.4. Determining Affordability of the Estimated Housing Supply

To estimate the affordability level of these units, a mortgage payment calculation was applied to single-family and two-unit structures. Housing and Urban Development’s (HUD) Median Family Incomes (MFIs) data was used to determine affordability at each Area Median Income (AMI) level. For five or more-unit structures, the project team used HUD’s Fair Market Rents (FMRs) to determine the affordability level.

3.2.5. Adjustments based on Local Housing Market

The initial analysis and projections indicate that some housing units were built for affordability levels of less than 80% AMI income earners. However, discussions with staff members of Douglas County and the City of East Wenatchee reveal that it is highly unlikely that any of the housing built within the region was affordable. As a result, all housing units estimated to have been built between 2020 and 2026 were assumed to provide housing options to population earning more than 80% of the Area Median Income. Specifically, 5% of the housing units supply were estimated to provide housing affordable to population earning 80-100% of the Area Media Income while the remaining 95% were split evenly between the 100-120% AMI level and the 120%+ AMI level. See Table B.3 for reference.

Figure 3.3 Estimated Housing Supply by Region and Income Level, 2021-2026

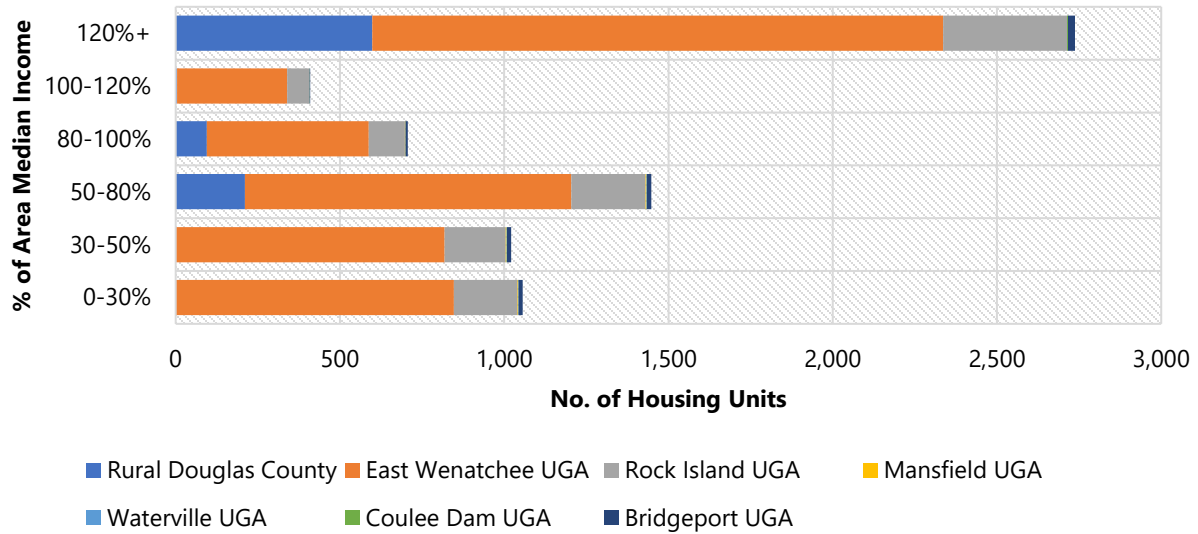


Source: Housing for All Planning Tool, Method C; WCRER Housing Permit Data; HUD Area Median Incomes; HUD Fair Market Rents

3.3. Housing Demand by Income Level and Region, 2027-2046

The housing demand for the duration of planning (2027-2046) was obtained by deducting the estimated housing supply in 2020-2026 from the estimated housing demand in 2020-2046. Douglas County expects to see total regional demand of 7,368 housing units to accommodate the projected growth in the planning period. Of these units, a demand for 2,732 single-family dwelling units and 4,636 multi-family dwelling units is estimated. Figure 3.4 below depicts the housing demand for this planning period by levels of affordability. As allocated, the majority of the housing demand for is to be accommodated within Rural Douglas County, East Wenatchee UGA and Rock Island UGA. See [Appendix B](#) for reference.

Figure 3.4 Housing Demand by Region and Income Level, 2027-2046



Source: Housing for All Planning Tool, Method C; WCRER Housing Permit Data; HUD Area Median Incomes; HUD Fair Market Rents

3.4. Temporary, Emergency Housing Demand, 2027-2046

Additionally, the HAPT model produced housing unit needs for temporary, emergency housing. As of 2020, Douglas County has an estimated 40 temporary, emergency housing units. According to the HAPT model, the County will need 80 such units by 2046. This is 40 more units than the current total. Using Method C, 33 of these 40 new emergency housing units are allocated to East Wenatchee UGA, and seven are allocated to Rock Island UGA. See Table B.6 for reference.

4. Residential Land Capacity Analysis

4.1. Purpose

The Residential Land Capacity Analysis identifies vacant, re-developable, and underutilized residential land in the County’s urban and rural areas that have the potential to be developed with new or additional residential developments to accommodate the housing needs for the next twenty years (2027-2046).

This chapter lays out the assumptions and the methodology used in creating an inventory of the vacant, re-developable and underutilized lands. This analysis refines the assumptions borrowed from the City of East Wenatchee and the previous Population Allocation and Land Capacity Memo (2023) for Douglas County prepared by BERK Consulting. These assumptions were customized to accommodate the regional conditions as well as unique local circumstances.

The geographic scope of the residential LCA includes all Urban Growth Areas (cities and unincorporated UGAs) as well as rural Douglas County.

4.2. Assumptions to create Land Inventory

This study is based on the following assumptions:

- (1) It was assumed that the land in each zoning district would be developed to the highest possible density limitations permitted in that particular zoning district.
 - o For instance, Rural Service Center (RSC) zoning district in rural Douglas County allows both single-family homes and duplexes. For the purposes of calculating potential housing development on such parcels, it is assumed that these parcels will be developed with duplexes wherever sufficient land area is available.

The following zoning districts allow single-family dwellings only and are therefore assumed to develop at a lower residential density.

RURAL DOUGLAS COUNTY		EAST WENATCHEE UGA	
AC-10	Commercial Agriculture Zoning District	R-L	Residential Low Density Zoning District
AC-5	Commercial Agriculture Zoning District		
A-D	Dryland Agriculture Zoning District	ROCK ISLAND UGA	
RR-2	Rural Resource Zoning District	R-L	Low Residential Zoning District
RR-5	Rural Resource Zoning District		
RR-20	Rural Resource Zoning District	COULEE DAM CITY UGA	
		R1	Single-family Zoning District
BRIDGEPORT UGA		WATERVILLE UGA	
R-1	Single-Family Low Density Zoning District	R-1	Residential Single-Family Zoning District
MANSFIELD UGA			
R1	First Residential Zoning District		

The following zoning districts permit duplexes or multi-family dwellings. Some of these zoning districts allow single-family dwellings as well. However, it is assumed that they will be developed to the highest allowed residential density to meet the housing demand of the region.

RURAL DOUGLAS COUNTY		EAST WENATCHEE UGA	
R-REC	Rural Recreation Zoning District	R-M	Residential Medium Density Zoning District
RSC	Rural Service Center Zoning District	R-H	Residential High Density Zoning District
BRIDGEPORT UGA		M-U	Mixed Use Zoning District
R-2	Mixed-Family Medium Density Zoning District	ROCK ISLAND UGA	
COULEE DAM CITY UGA		M-R	Recreation Mixed Use District
R2	Multi-family Zoning District	MANSFIELD UGA	
WATERVILLE UGA		R2	Second Residential Zoning District
R-2	Residential Multifamily Zoning District	R3	Third Residential Zoning District
		SR	Special Residential Zoning District

- (2) It is assumed that land under certain types of ownership or current uses will not be converted to residential uses even when zoned for residential purposes. Such ownership or uses include the following:
- a. Government-owned parcels
 - b. School District-owned parcels
 - c. Tribe-owned parcels
 - d. Fire District-owned parcels
 - e. Public/ Quasi-Public land, Recreational land (parks, golf courses etc.)
 - f. Home-owner association owned parcels for utilities, infrastructure, recreation or open-space
 - g. Cemeteries
 - h. Churches
 - i. Existing Utility Corridors or Easements that restrict development.
- (3) For instance, Rock Island has electrical easements owned by Chelan County PUD, Douglas County PUD and Bonneville Power Administration (BPA) that are significantly larger than the typical electrical easement restricting development. Land under this easement is not able to be developed for residential purposes and was reduced from the eligible land for Rock Island. This easement is depicted in [Appendix D](#). It is assumed that steep slopes of over 15% grade and development in the FEMA Special Flood Hazard Area Zones A, AE and AO present unique challenges to development in these areas often increasing the cost of development.
- (4) Market Factors: It is assumed that approximately 25% of the land will not develop due to market factors such as unwilling sellers, buyers, or developers or owners conserving land through land conservation trusts. Therefore, this reduction was made from the land inventory.
- o For potentially re-developable parcels, we assumed a 35% market factor. Fewer of these properties will develop with additional housing compared to vacant lands due to the existence of current residential structures. So, we applied a higher market factor.
 - o Underutilized parcels, the least likely property classification to redevelop, also used higher market factors. Specifically, we assumed a 50% market factor. While these properties are not used to their full potential, they use the entire property for residential purposes, making them even less likely to redevelop than potentially re-developable properties. For Rock

Island, we assumed a 60% market factor, due to the current zoning code not including a true multi-family residential district.

- An additional, community-specific adjustment was made to account for new single-family home development. This adjustment uses a gross, percentage reduction based on the number of single-family homes that have been developed in the last five years. See the process in [Appendix N](#).
- (5) Public Infrastructure and Roads: It is assumed that as development occurs, nearly 25% of the land in the inventory would be used to accommodate public infrastructure and public rights-of-way that would support the said future development.
- (6) Vacant Land: Parcels with an improvement value of \$10,000 or less were considered to be vacant.
- (7) Re-developable Land: Residential parcels that are not vacant (parcels with an improvement value of more than \$10,000) and have an improvement-to-land value ratio of less than 1.0 were classified as “potentially re-developable,” assuming that such parcels could be considered for redevelopment to accommodate more housing. The improvement-to-land ratio is equivalent to a 50% improvement-to-total assessed value ratio.
- For instance, if the total assessed value of a parcel is \$200,000, and the improvement value is \$75,000, the land value would be \$125,000. This parcel would be classified as potentially re-developable. These parcels are not considered vacant because their improvement values exceeds \$10,000, but their improvement value is less than the land value of the parcel.
- (8) Underutilized Land: This category of land inventory includes residential parcels that are assumed to be underutilized that do not fall in either vacant nor potentially re-developable parcels category. This category includes parcels that are developed a lower density than that permitted by the zoning district in which the parcel is located.
- For instance, parcels that are assigned a Department of Revenue Code of 11 – Residential – Single-Family but are located in a zone with a higher maximum density (for example, R-M in East Wenatchee), such parcels are considered underutilized.
 - In another example, in Bridgeport UGA and East Wenatchee UGA, parcels that are located in R-3 or R-H zones but have a DOR Code of 12 – Residential – 2-4 units, are considered underutilized.
- (9) The following assumed development densities were used for each of the zoning districts to calculate the potential number of housing units that can be built on vacant land, re-developable or underutilized land. Maximum allowable densities were not used for these calculations because it is not likely for housing developments to reach the maximum in most cases.
- For East Wenatchee UGA, the assumed development densities were derived from the Greater East Wenatchee Comprehensive Plan. The assumed densities are 4 du/a in R-L, 12 du/a in R-M, and 8 du/a in R-H zoning districts. Since R-H Residential High Density Zoning District permits development of commercial uses as well, it is assumed that some of the development occurring in this zoning district would be commercial in nature. Maximum allowable densities in East Wenatchee’s residential zones are 5 du/a, 20 du/a, and 30 du/a, respectively.

- For Rock Island UGA, the assumed development densities were derived from the city's zoning ordinances. The R-L zoned parcels are assumed to develop at 4 duu density. The M-R zoned parcels are assumed develop at 8 duu density presuming that all of the land area in this mixed-used zoning district may develop with uses other than residential. Maximum allowable densities in Rock Island's residential-allowable zones are 5 duu and 10 duu, respectively.
- Many of the other jurisdictions in the region do not specify maximum densities in their zoning codes (such as Coulee Dam and Waterville). To calculate the potential housing units that could develop in the remaining UGAs, we derived assumed densities from the Greater East Wenatchee Comprehensive Plan as East Wenatchee is the premier development center for the county. The low-residential density zones are assumed to develop at 4 duu density, the middle-residential density zones are assumed to develop at 10 duu density, and the high-residential density zones are assumed to develop at 15 duu density.

4.3. Methodology to create Land Inventory

The analysis began with a comprehensive evaluation of all parcels in Douglas County. Using the above noted assumptions, the following steps were taken to create the land inventory.

- (1) The local zoning codes were used to identify and extract all parcels zoned for residential development in all the Urban Growth Areas and rural areas of the county.
- (2) Subsequently, the residential parcels were segregated by zoning districts to identify land that could be developed with single-family dwellings and multi-family residential development.
- (3) The parcels with ownership or uses such as government-owned parcels, school district-owned parcels, tribe-owned parcels, fire district-owned parcels, public/ quasi-public land, recreational land (parks, golf courses etc.), home-owner association owned parcels, land reserved for cemeteries, or developed with churches were removed from the inventory.
- (4) Land containing steep slopes of over 15% grade and FEMA Special Flood Hazard Area Zones A, AE and AO were removed from the land inventory.
- (5) 25% of the remaining land area was deducted from the land inventory to accommodate market factors.
- (6) 25% of the remaining land area was deducted from the land inventory to accommodate development of public infrastructure and roads that would support the future development.
- (7) The remaining inventory was then separated into three different categories using improvement values, land values and Department of Revenue (DOR) tax codes based on the assumptions noted above. The three categories of land inventory is as follows:
 - a. Vacant Land
 - b. Re-developable Land
 - c. Underutilized Land

- (8) The area of land (in acres) obtained with the land inventory was then multiplied with assumed residential densities for each of the zoning districts (as noted in the assumptions above) to derive the potential number of housing units that could be accommodated on that land.

This methodology can be more closely examined through the data included in Table F.1 through Table F.9.

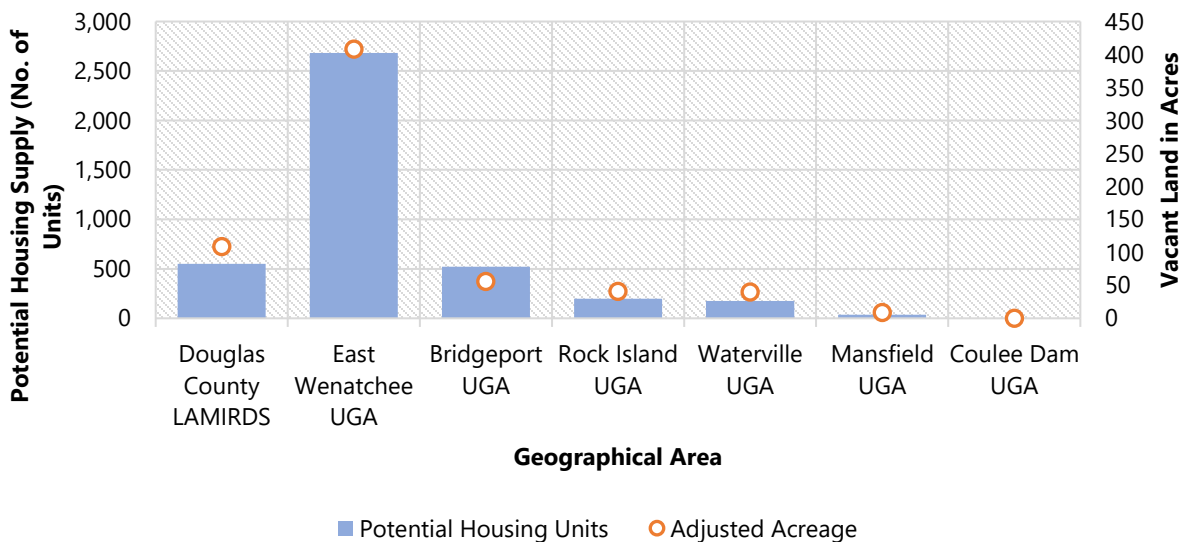
4.4. Vacant Land Inventory and Potential Housing Units Supply

As noted in the assumptions, parcels with an improvement value of less than \$10,000 are assumed to be vacant.

The figures below depict the vacant land inventory derived using the assumptions and methodology noted in the previous section.

Figure 4.1 depicts the vacant land available in the Urban Growth Areas and Rural Douglas County along with the corresponding number of housing units that the vacant land can support to accommodate the twenty-year growth expected to occur in the county from 2027 to 2046. See Table F.1 for reference.

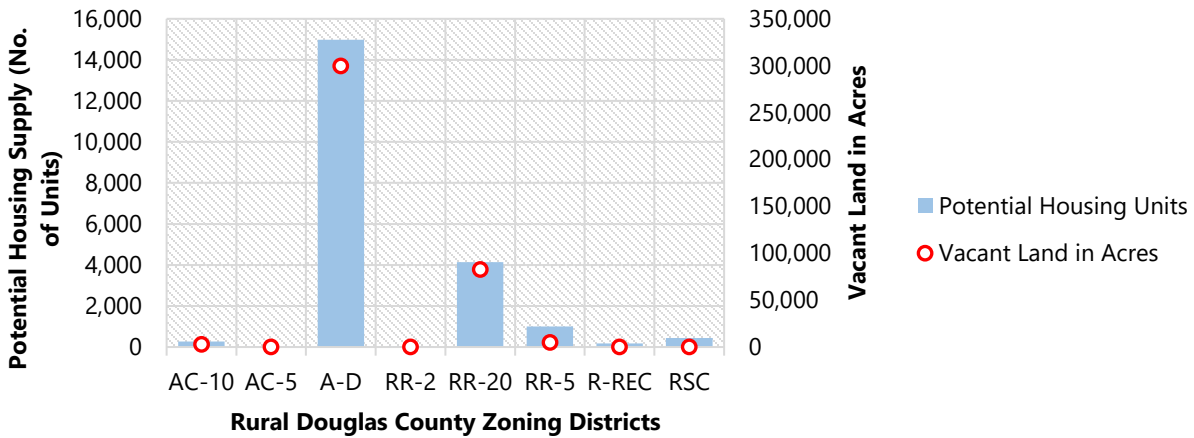
Figure 4.1 Residential Land Capacity Analysis – Vacant Land Inventory and Potential Housing Unit Supply



Source: Douglas County Land Services Department, 2024

Figure 4.2 depicts the vacant land available in the various zoning districts of Rural Douglas County and the corresponding number of housing units that the vacant land can support to accommodate the twenty-year growth expected to occur in the county from 2027 to 2046. See Table F.2 for reference.

Figure 4.2 Rural Douglas County – Vacant Land Inventory and Potential Housing Unit Supply

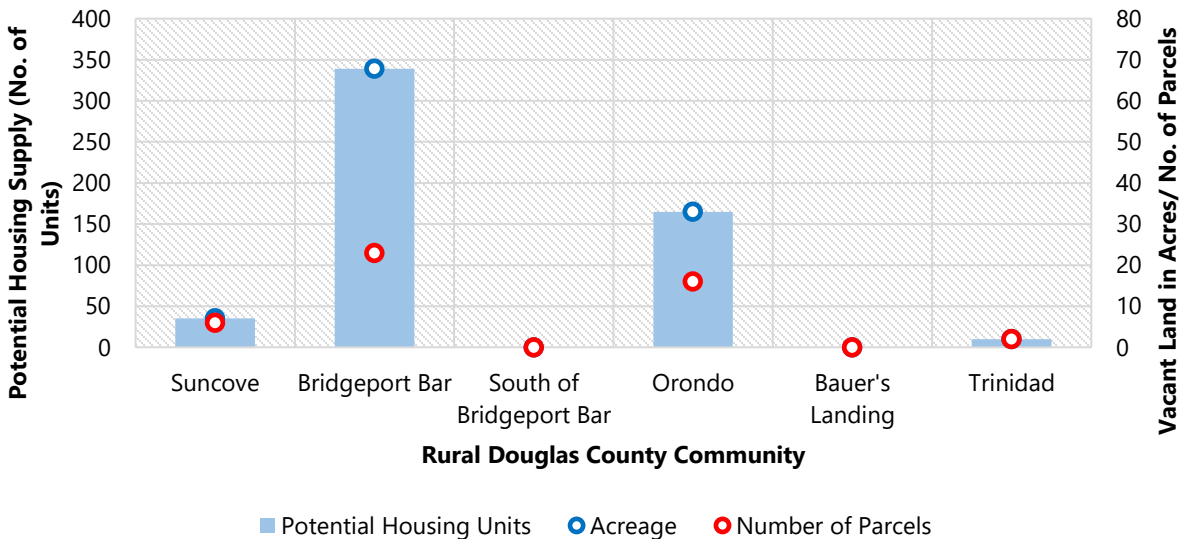


Source: Douglas County Land Services Department, 2024

Figure 4.3 depicts the vacant land inventory and the corresponding potential housing supply in specific communities zoned Rural Service Center (RSC) or Rural Recreation (R-REC) in the rural county, that may have partial availability of urban services. These zoning districts permit development of duplexes and may afford housing opportunities for middle-income and high-income earners in rural Douglas County. General extent of these communities is illustrated in [Appendix H](#). See Table F.3 for reference.

It is important to note that there is no availability of vacant land in Bauer’s Landing and South of Bridgeport Bar that is more than 0.5 acres in area.

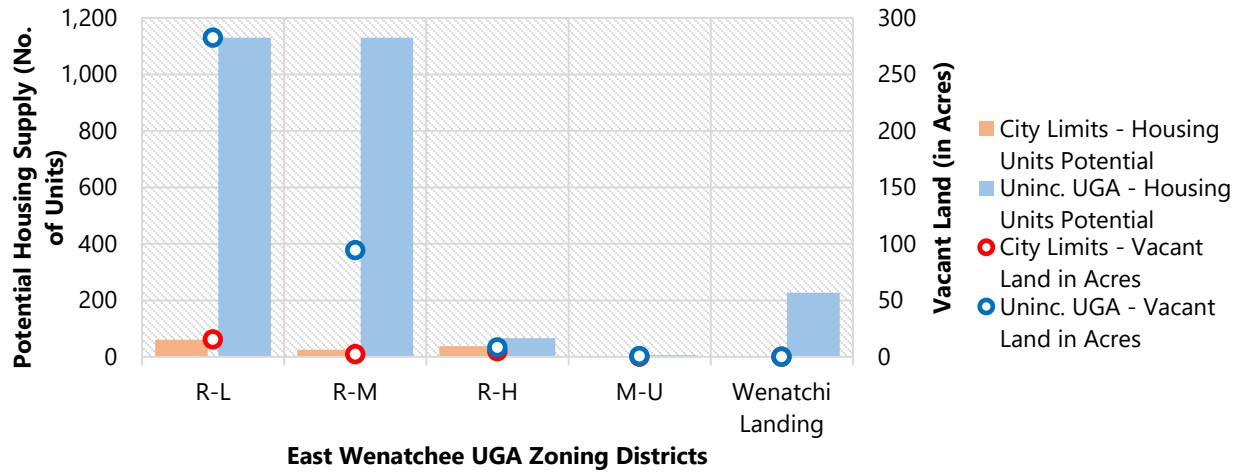
Figure 4.3 Rural Douglas County (Community-Specific) – Vacant Land Inventory and Potential Housing Unit Supply



Source: Douglas County Land Services Department, 2024

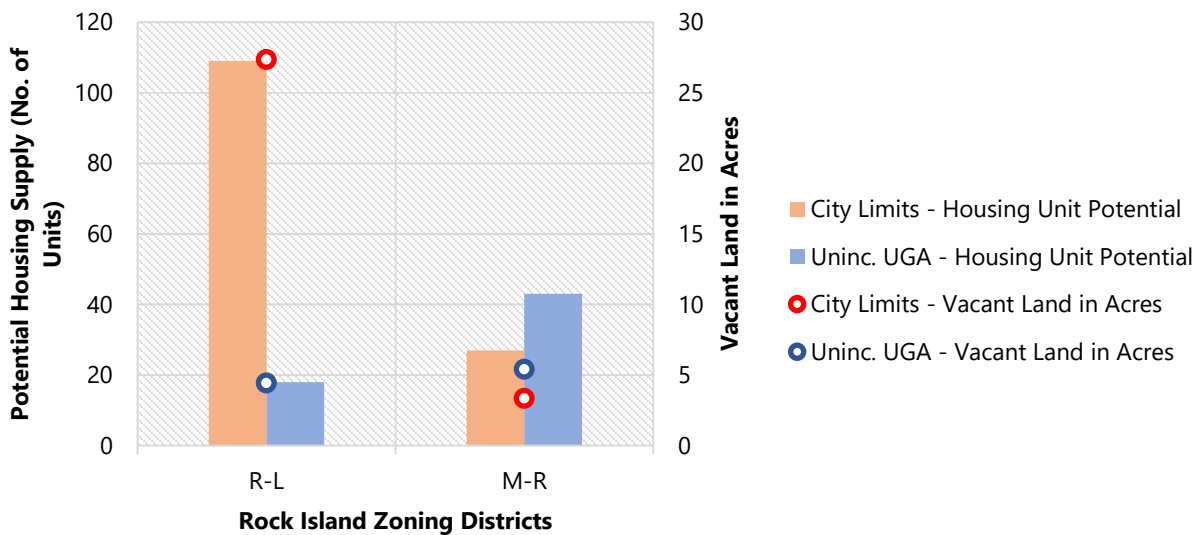
Figure 4.4 through Figure 4.8 depict the vacant land inventory and the corresponding housing unit supply that each Urban Growth Area can accommodate based on the current zoning of the land. The vacant land inventory is illustrated in Table F.4 through Table F.9.

Figure 4.4 Vacant Land Inventory and Potential Housing Units Supply - East Wenatchee UGA



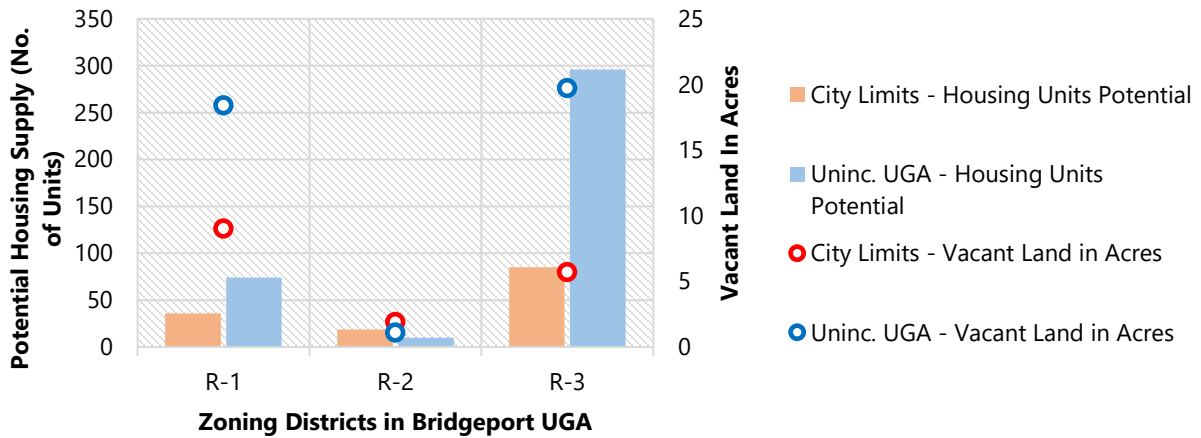
Source: Douglas County Land Services Department, 2024

Figure 4.5 Vacant Land Inventory and Potential Housing Units Supply - Rock Island UGA



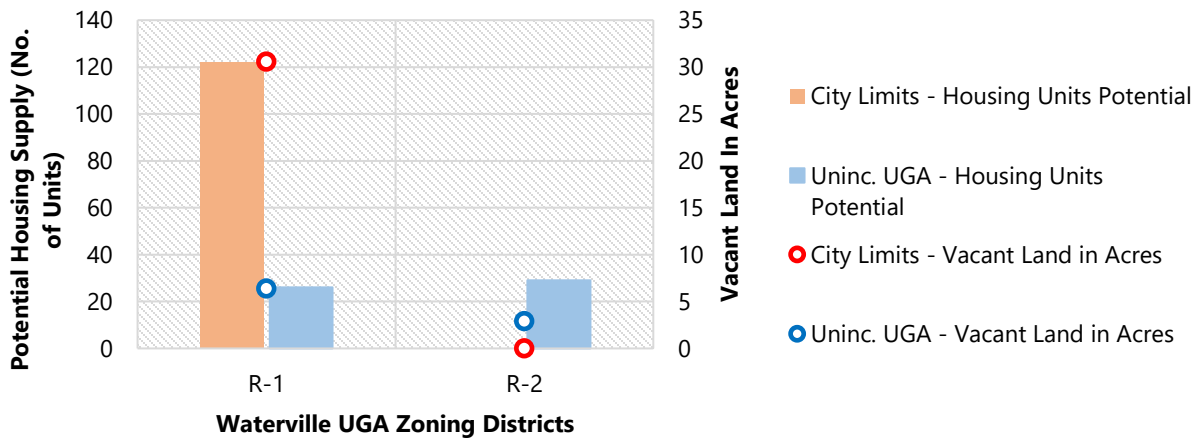
Source: Douglas County Land Services Department, 2024

Figure 4.6 Vacant Land Inventory and Potential Housing Units Supply: Bridgeport UGA



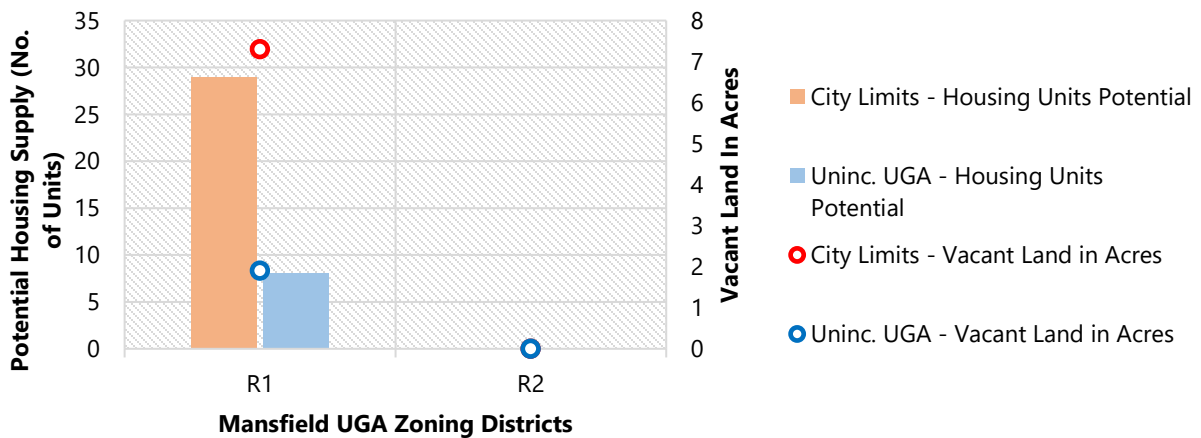
Source: Douglas County Land Services Department, 2024

Figure 4.7 Vacant Land Inventory and Potential Housing Units Supply: Waterville UGA



Source: Douglas County Land Services Department, 2024

Figure 4.8 Vacant Land Inventory and Potential Housing Units Supply: Mansfield UGA



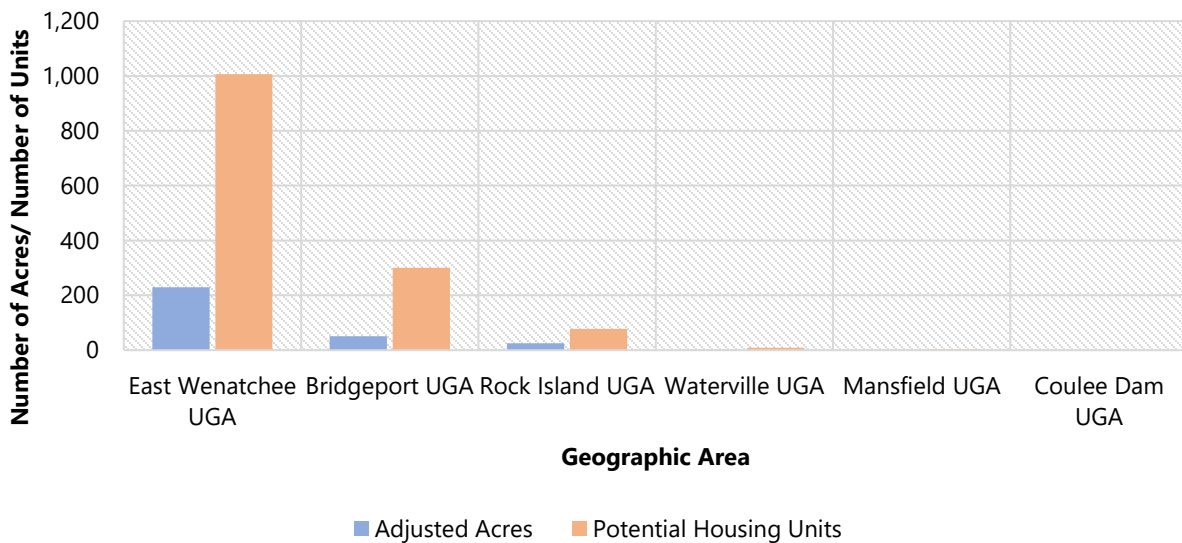
Source: Douglas County Land Services Department, 2024

4.5.Re-developable Land Inventory

As defined in the assumptions of this study, residential parcels that are not vacant (parcels with an improvement value of more than \$10,000) and have an improvement-to-land value ratio of less than 1.0 were classified as “potentially re-developable.” These parcels have an improvement value that is lower than the land value of the parcel, which indicates an opportunity to improve the land to a greater extent to accommodate more housing. However, not all parcels will necessarily be redeveloped, so we applied a 35% market factor to the estimates. There are no potentially re-developable parcels in Coulee Dam.

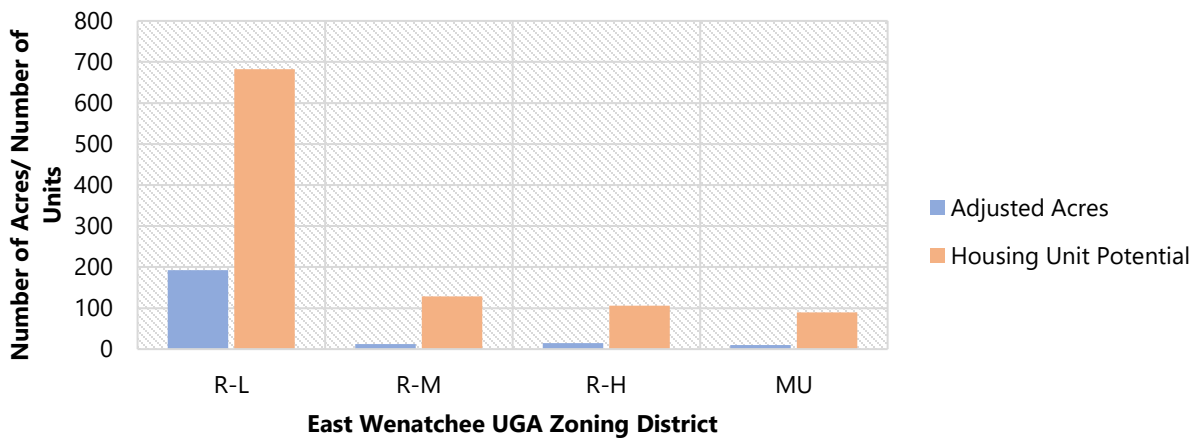
The figures below depict the vacant land inventory derived using the assumptions and methodology noted in the previous section.

Figure 4.9 Residential LCA, Potentially Re-developable Parcel Analysis Results



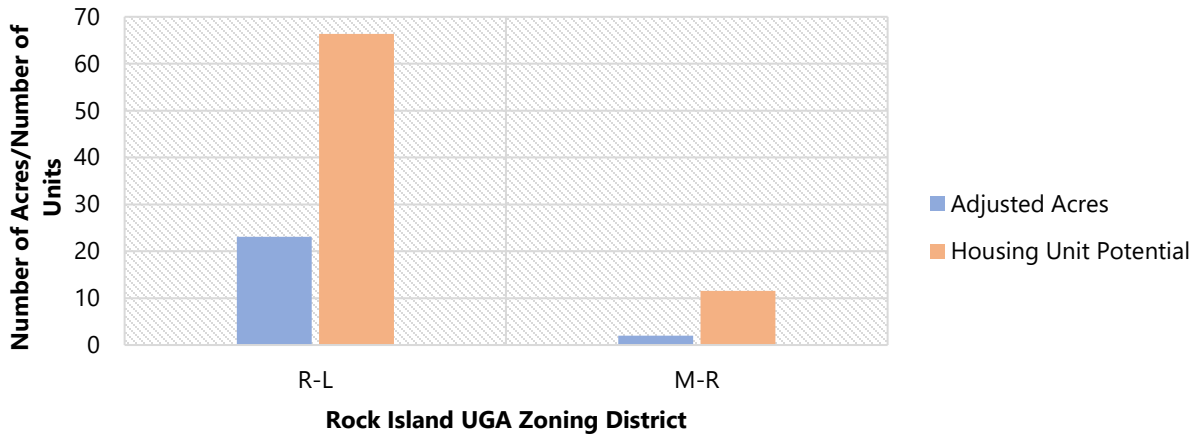
Source: Douglas County Land Services Department, 2024

Figure 4.10 Potentially Re-developable Parcels in East Wenatchee UGA



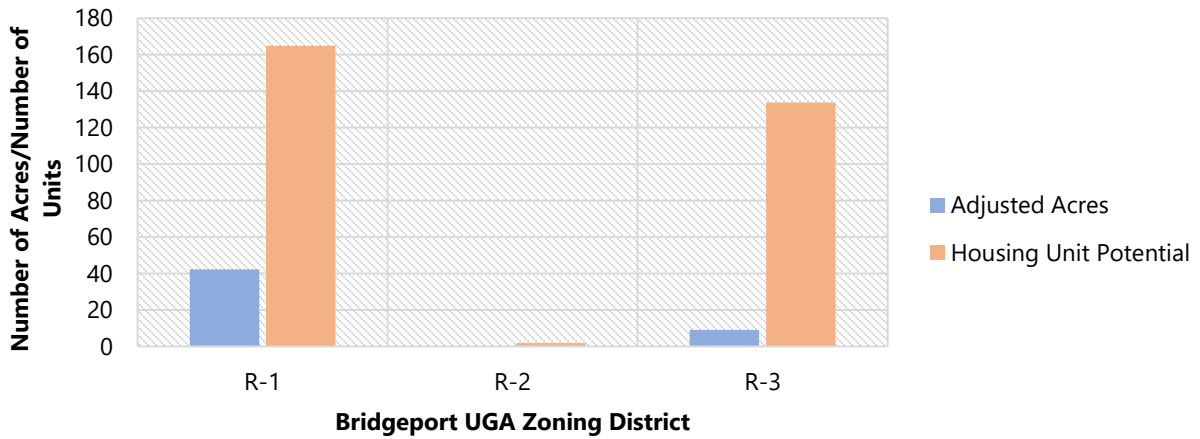
Source: Douglas County Land Services Department Data, 2024

Figure 4.11 Potentially Re-developable Parcels in Rock Island UGA



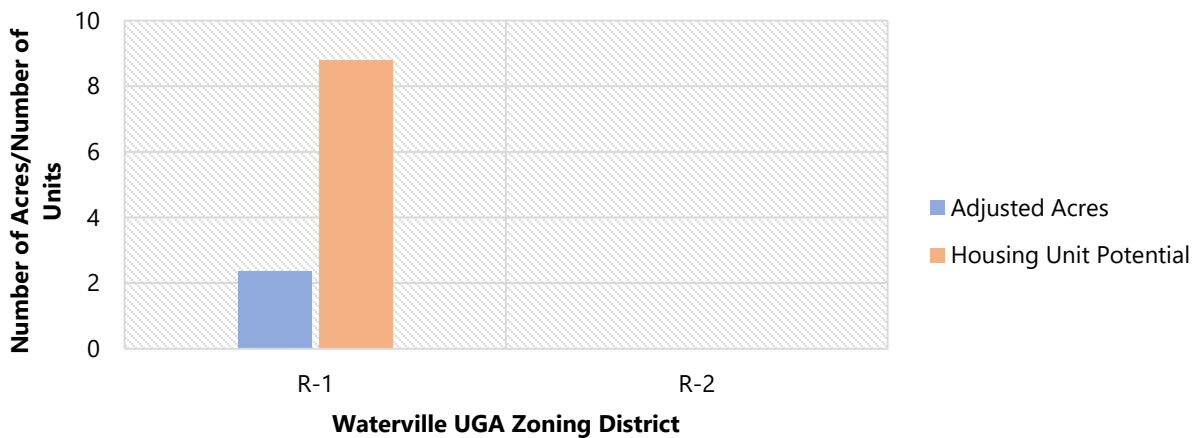
Source: Douglas County Land Services Department Data, 2024

Figure 4.12 Potentially Re-developable Parcels in Bridgeport UGA



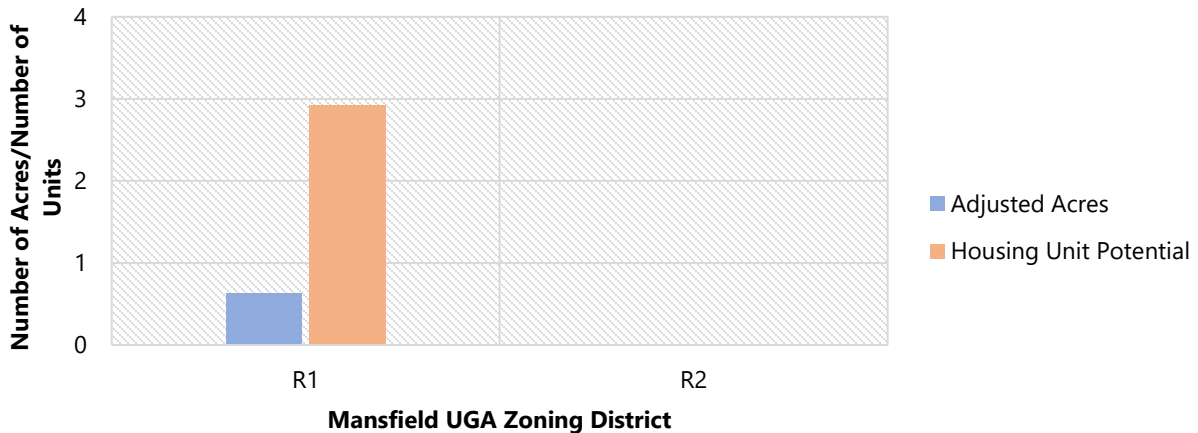
Source: Douglas County Land Services Department Data, 2024

Figure 4.13 Potentially Re-developable Parcels in Waterville UGA



Source: Douglas County Land Services Department Data, 2024

Figure 4.14 Potentially Re-developable Parcels in Mansfield UGA



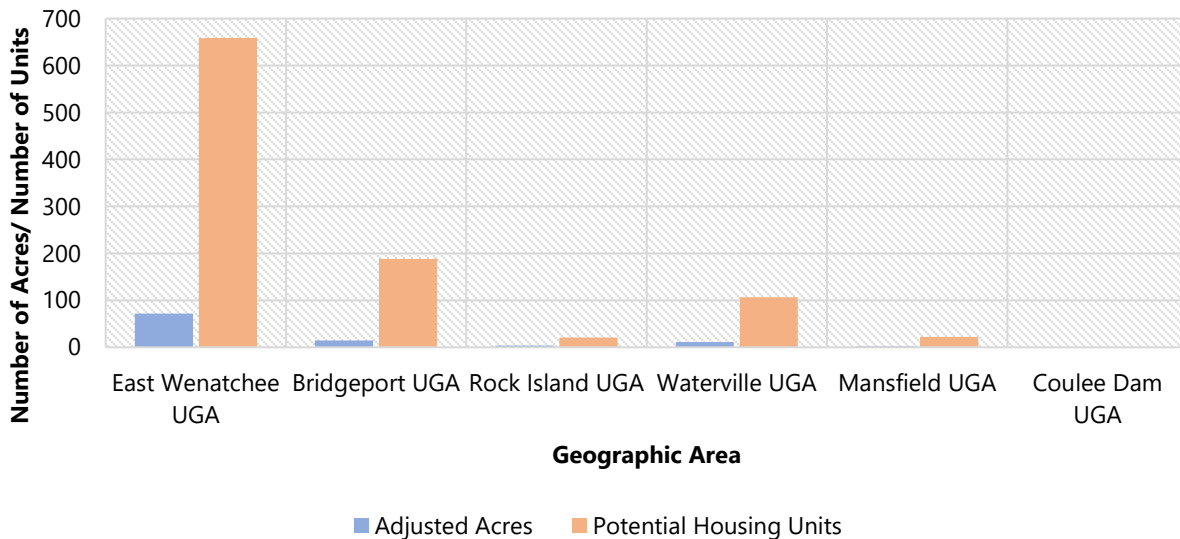
Source: Douglas County Land Services Department Data, 2024

4.6. Underutilized Land Inventory

As noted in the study assumptions, underutilized land category includes residential parcels that are assumed to be underutilized that do not fall in either vacant nor potentially re-developable parcels category. This category includes parcels that are developed at a lower density than that permitted by the zoning district in which the parcel is located. The assumptions include examples to further illustrate the way these parcels were categorized.

The analysis of underutilized parcels produced the following results:

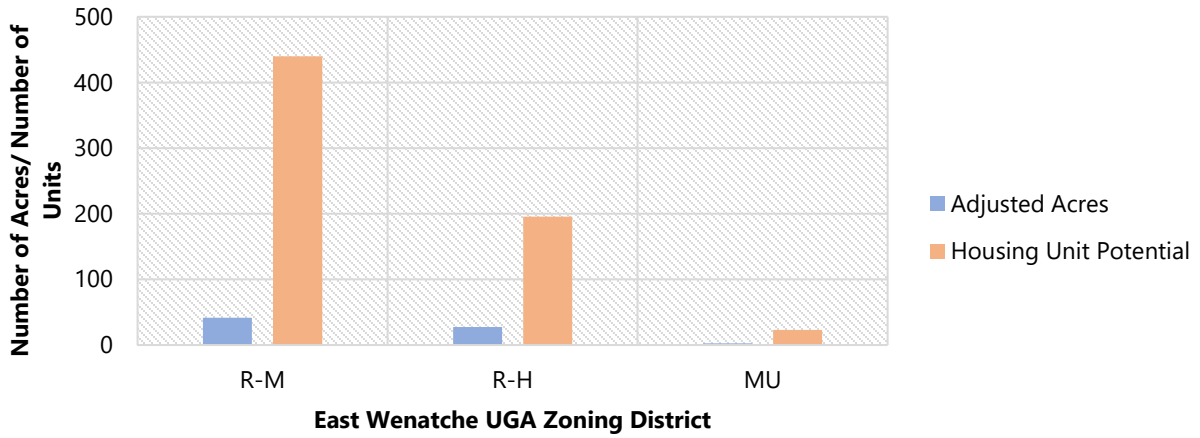
Figure 4.15 Residential LCA, Underutilized Parcel Analysis Results



Source: Douglas County Land Services Department, 2024

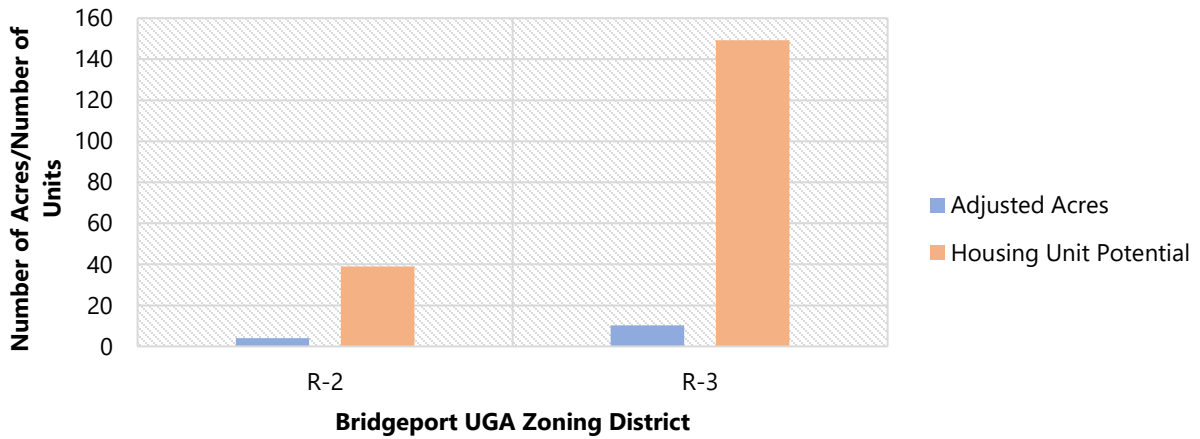
The figures below depict the results of the land inventory for potentially re-developable land derived using the assumptions and methodology noted in the previous section. The study depicts that there are no underutilized parcels in Coulee Dam UGA.

Figure 4.16 Underutilized Parcels in East Wenatchee UGA



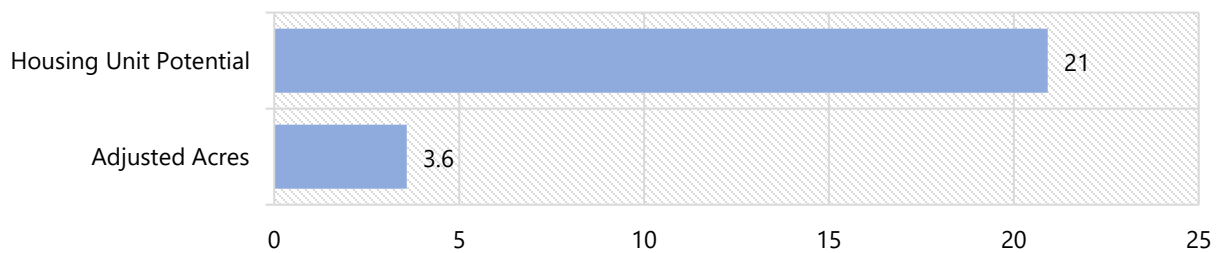
Source: Douglas County Land Services Department, 2024

Figure 4.17 Underutilized Parcels in Bridgeport UGA



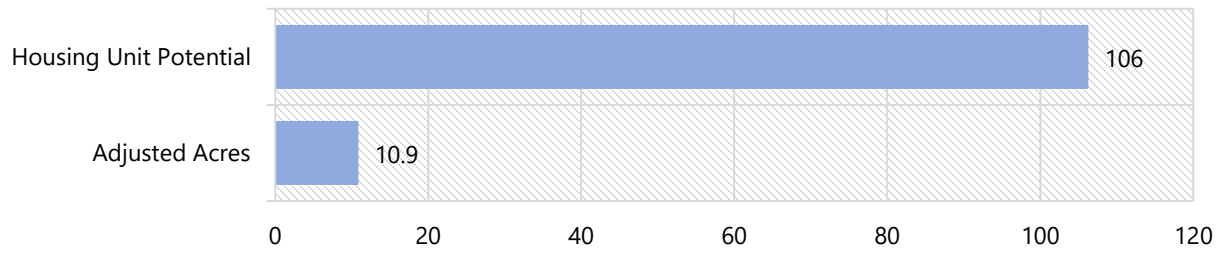
Source: Douglas County Land Services Department, 2024

Figure 4.18 Underutilized Parcels in Rock Island UGA (M-R District)



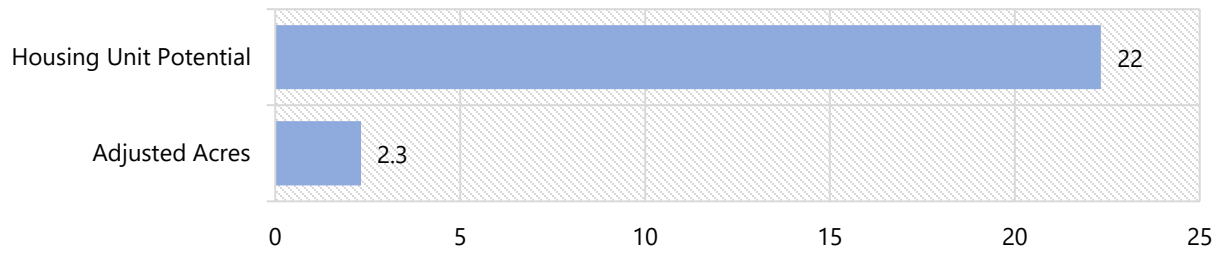
Source: Douglas County Land Services Department, 2024

Figure 4.19 Underutilized Parcels in Waterville UGA (R-2 District)



Source: Douglas County Land Services Department, 2024

Figure 4.20 Underutilized Parcels in Mansfield UGA (R2 District)



Source: Douglas County Land Services Department, 2024

5. Housing Demand vs. Supply

The previous chapters in the study set the stage for evaluating whether the current zoning regulations and land inventory can meet the housing demand projected for the county over the next two decades. By comparing the estimated housing supply in each zoning district against the expected housing demand from 2027 to 2046, the analysis highlights potential gaps or surpluses in housing availability. This type of assessment is critical for long-term urban planning, ensuring that there is enough land zoned appropriately, and enough land at all to accommodate the population growth and housing needs without overburdening infrastructure or underutilizing available space.

It is important to note that the housing supply noted in this chapter is based solely on vacant land available in the urban areas of the county.

5.1. Relationship between Zoning Districts and Housing Affordability

For the purposes of this study, it is assumed that single-family dwellings developed in the next two decades will provide housing opportunities to earners that earn more than 120% of the Area Median Income. This includes all zoning districts in the urban and rural areas of the county that allow single-family dwelling units only. Some examples are RR-2, RR-5, A-D, etc. zoning districts in the County; R-L zoning district in East Wenatchee UGA and so on.

Similarly, it is assumed that duplexes and multi-family dwellings developed in the next two decades will provide housing opportunities to earners that earn less than 120% of the Area Median Income. This includes all zoning districts in the urban areas of the county that allow duplexes and multi-family dwellings. Some examples of such zoning districts include R-M, R-H, etc. zoning districts in East Wenatchee UGA, M-R zoning district in Rock Island UGA and so on.

More specifically, only two zoning districts in the entire county, R-H (Residential High Density) in East Wenatchee UGA and R-3 (Multi-family Residential) in Bridgeport UGA, are expected to provide affordable housing opportunities to earners earning less than 50% of the Area Median Income. All other zoning districts that allow duplexes and multi-family dwellings are expected to provide housing opportunities to earners anywhere between 50% to 120% of the Area Median Income.

5.2. Findings: Does Supply Meet Demand?

The table below compares the total housing demand vs the estimated housing supply that the region can support based on the current zoning of the land. Regions where the estimated supply is likely to meet the projected housing demand are Rural Douglas County, Mansfield UGA, Waterville UGA, and Bridgeport UGA. There are three regions in which residential capacity does not meet the need East Wenatchee UGA, Rock Island UGA, and Coulee Dam UGA.

Table 5.1 Housing Needs by Region, Affordability Level & Total Potential Housing Supply

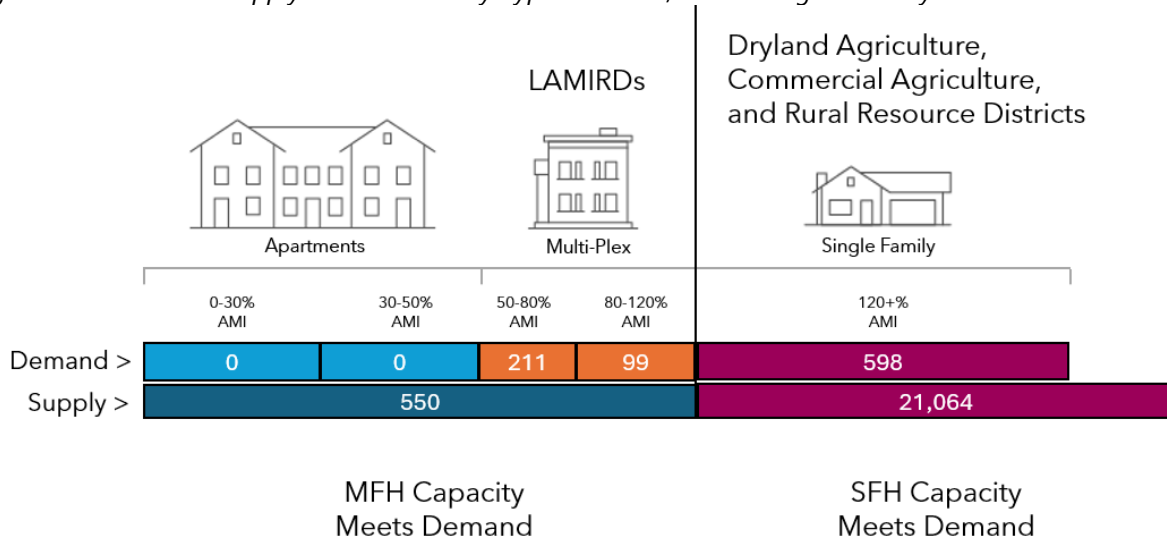
Region	No. of Dwelling Units by Affordability Levels for Income Earners earning a % of the Area Median Income						Total No. of Dwelling Units (Demand)	Total No. of Dwelling Units (Supply)	Supply Meets Demand?
	0-30%	30-50%	50-80%	80-100%	100-120%	120%			
Rural Douglas County	0	0	211	95	4	598	908	21,064	Yes
East Wenatchee UGA	847	819	993	493	335	1,738	5,225	4,348	No
Bridgeport UGA	12	12	14	7	2	21	68	1,009	Yes
Rock Island UGA	193	186	226	111	67	377	1,160	296	No
Waterville UGA	1	1	1	0	0	0	3	292	Yes
Mansfield UGA	2	2	2	1	0	0	7	37	Yes
Coulee Dam UGA	1	1	1	1	1	3	8	1	No

Source: Housing for All Planning Tool Method C; WCRER Housing Permit Data; HUD Area Median Incomes; HUD Fair Market Rents; Douglas County Land Services Department Data, 2024

5.2.1. Rural Douglas County

Due to the use of HAPT Method C, no multi-family development is allocated to Rural Douglas County, as reflected in Figure 5.1 below. A few areas zoned RSC and R-REC, known as limited areas of more intensive rural development (LAMIRD), are able to accommodate housing from the 50% AMI level to 120% AMI. All other rural zoning districts, like dryland agriculture or rural resource, are able to accommodate housing at the 120%+ AMI level.

Figure 5.1 Residential Supply and Demand by Type and Area, Rural Douglas County

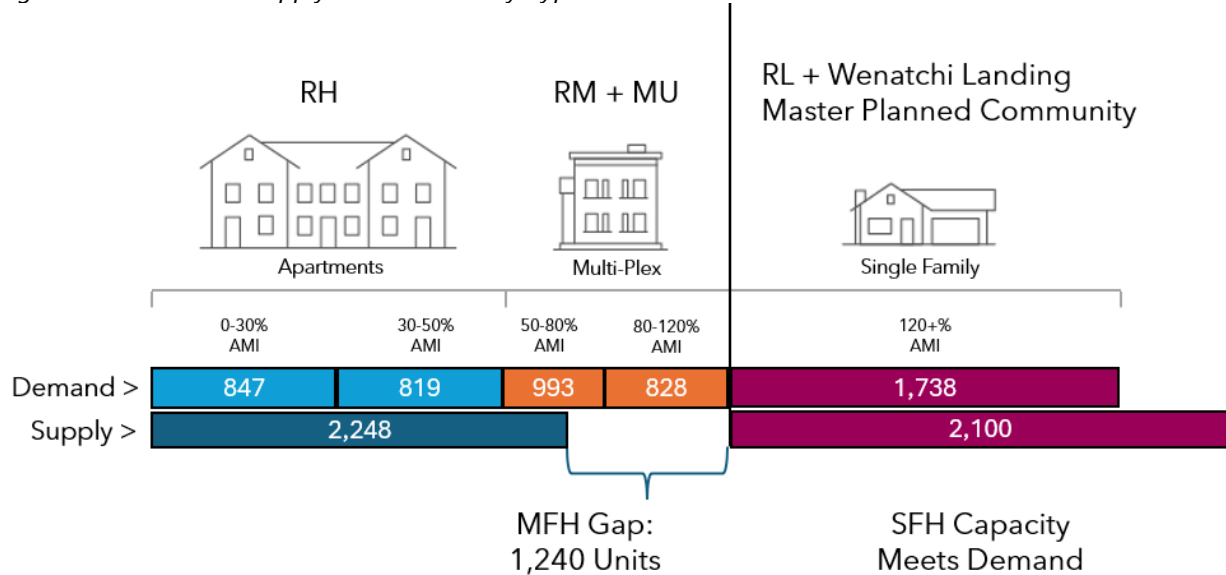


Source: Washington State Department of Commerce; Housing for All Planning Tool, Method C; WCRER Housing Permit Data; HUD Area Median Incomes; HUD Fair Market Rents; Douglas County Land Services Department Data, 2024

5.2.2. East Wenatchee UGA

As shown in Figure 5.2, the residential capacity does not meet the housing needs in East Wenatchee’s UGA. The single-family housing (SFH) supply is made up of R-L zoned land and the Wenatchi Landing Master Planned Community, which can accommodate about 227 housing units. Considering both of these areas, East Wenatchee’s capacity meets the demand for SFH. Multi-family housing (MFH) capacity was determined as RM, RH, and MU zoned land. Ultimately, our analysis shows there is not enough MFH-allowable land to accommodate the need in East Wenatchee.

Figure 5.2 Residential Supply and Demand by Type and Zone in East Wenatchee UGA



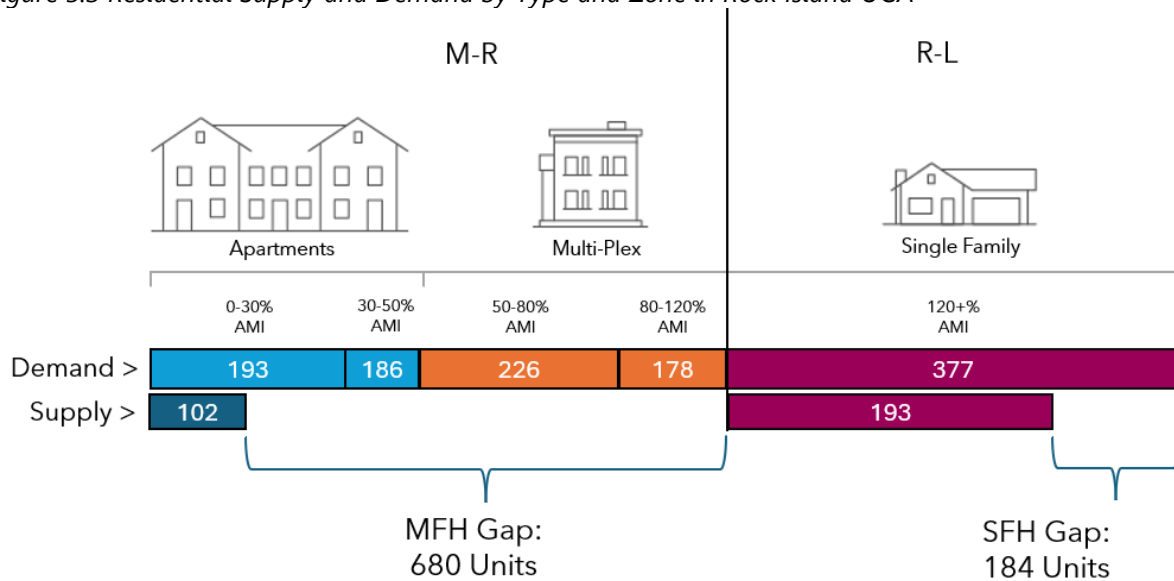
Source: Washington State Department of Commerce; Housing for All Planning Tool, Method C; WCRER Housing Permit Data; HUD Area Median Incomes; HUD Fair Market Rents; Douglas County Land Services Department Data, 2024

5.2.3. Rock Island UGA

The land capacity in Rock Island’s UGA is reflected in Figure 5.3. Rock Island has two zones that can accommodate residential development, R-L and M-R. The M-R zone is the only zone that allows multi-family housing in Rock Island’s UGA, according to the current zoning regulations. However, it is not a true multi-family zoning district. The current inventory of land for multi-family housing could currently support only 102 multi-family units, falling short of accommodating another 680 housing units needed to accommodate future growth. The shortage of SFH land amounts to a gap of about 184 units.

Concern was voiced for Rock Island’s UGA, as there are several properties that are used for agriculture in R-L zoned areas, specifically for apple orchards. (Commerce noted that working farmlands are not zoned as Agricultural Resource lands.) Considering this, PC utilized DOR Codes to see which parcels were used for agriculture in R-L zones. This cross section revealed that the properties had low improvement values and were methodologically categorized as vacant lands. So, these properties are included in the supply shown in the figure below and in Rock Island UGA’s vacant lands inventory map.

Figure 5.3 Residential Supply and Demand by Type and Zone in Rock Island UGA



Source: Washington State Department of Commerce; Housing for All Planning Tool, Method C; WCRER Housing Permit Data; HUD Area Median Incomes; HUD Fair Market Rents; Douglas County Land Services Department Data, 2024

5.3. Potentially Re-Developable and Underutilized Market Factor Sensitivity Analysis

To ensure final capacity findings were not adversely impacted by potentially re-developable and underutilized housing unit potential estimates, PC utilized a sensitivity analysis. A sensitivity analysis amends a factor of interest (the market factor in this case) by 10 percentage points in either direction to examine what the outcome of a calculation would be, should the true outcome be higher or lower than what was predicted. Table 5.2 outlines the market factors we used for potentially re-developable and underutilized parcels to estimate their housing capacity over the next 20 years. A slightly higher market factor was used for underutilized parcels in Rock Island due to the fact that the city does not have a true multi-family or medium density residential district.

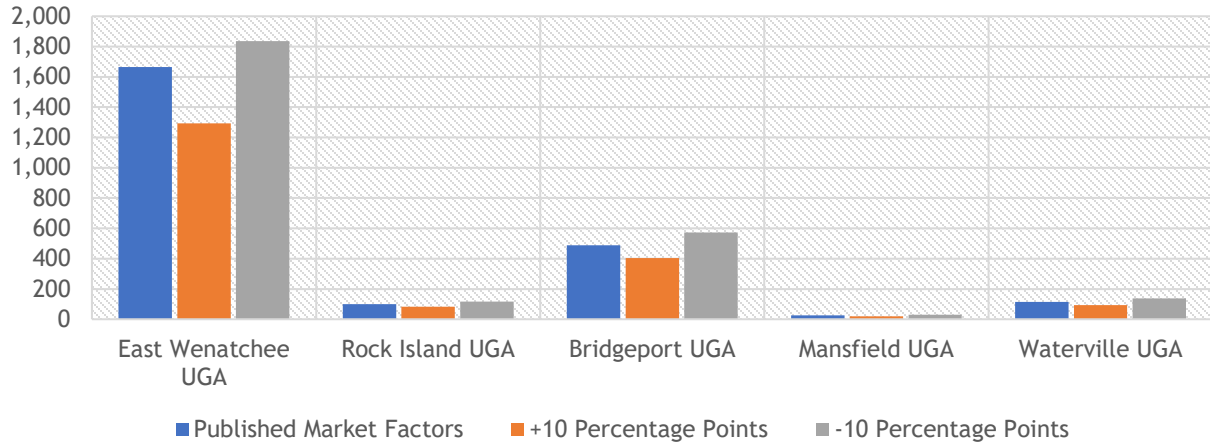
Table 5.2 Market Factors for Parcel Classifications

Region	Potentially Re-developable	Underutilized
East Wenatchee UGA	35%	50%
Rock Island UGA	35%	60%
All Other UGAs	35%	50%

Source: Points Consulting, 2025

Figure 5.4 illustrates the market factor sensitivity analysis, effectively showing high, medium, and low housing unit potential estimates. For East Wenatchee, potentially re-developable and underutilized properties could accommodate between 1,293 and 1,835 housing units. For capacity findings in Figure 5.2 and Table 5.1, we used the housing unit potential with the “Published Market Factors” (1,665). A community-specific approach was also utilized for this analysis to ensure a “one size fits all” approach was not used. See [Appendix N](#) and [Appendix O](#) for more information.

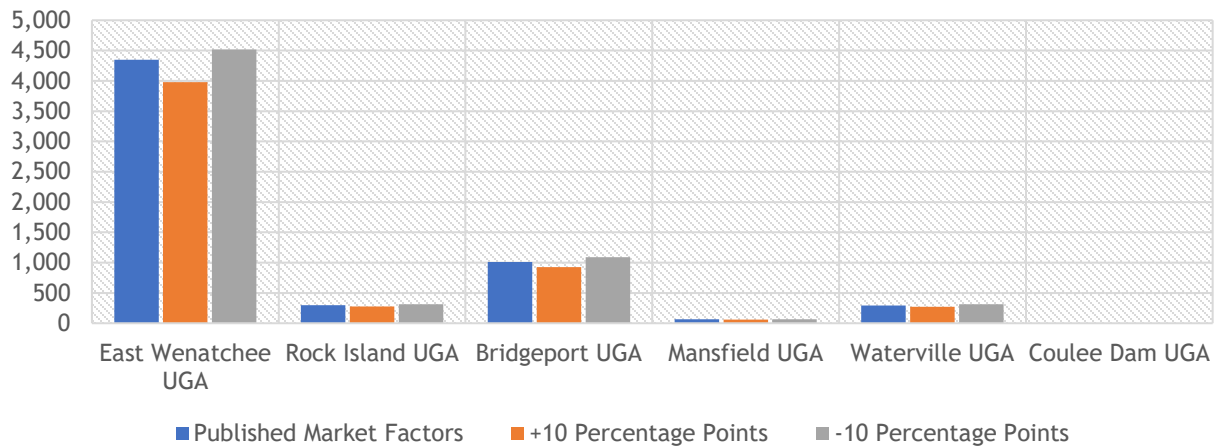
Figure 5.4 Total Potential Housing Units with Sensitivity Analysis for Potentially Re-developable and Underutilized Parcels



Source: Douglas County Land Services Department Data, 2024; OFM Post Censal Permits – Completed SFH, 2024; OFM Post Censal Housing Units, 2024

The total housing supply for each region over the next 20 years is displayed in Figure 5.5. For jurisdictions like East Wenatchee and Rock Island, the total housing supply for the next 20 years would not meet the total housing demand for the next 20 years. The same is true if lower market factors were utilized to calculate housing potential from potentially re-developable and underutilized properties.

Figure 5.5 Total Housing Supply, Including Potentially Re-developable and Underutilized Market Factor Sensitivity Analysis



Source: Douglas County Land Services Department Data, 2024; OFM Post Censal Permits – Completed SFH, 2024; OFM Post Censal Housing Units, 2024

A. Appendix: Population Estimates, Trends and Projections

Table A.1 Douglas County Population Estimates and Change, 2014 and 2024

Geographical Area	Estimated Total Population 2014	% of Total Population (2014)	Estimated Total Population 2024	% of Total Population (2024)	Numeric Change in Population 2014 to 2024	Percent Change in Population 2014 to 2024
Rural Douglas County	6,847	17.31%	8,175	18.11%	1328	19.40%
East Wenatchee UGA	27,540	69.62%	31,237	69.18%	3697	13.42%
Bridgeport UGA	2,329	5.89%	2,215	4.91%	-113	-4.87%
Rock Island UGA	1,160	2.93%	1,816	4.02%	656	56.51%
Waterville UGA	1,151	2.91%	1,162	2.57%	11	0.92%
Mansfield UGA	337	0.85%	346	0.77%	9	2.56%
Coulee Dam UGA	193	0.49%	200	0.44%	7	3.79%
Total County Population	39,557		45,150		5593	14.14%

Source: Washington State Office of Financial Management, Small Area Estimate Program

Table A.2 Population Estimates for Douglas County, 2010 -2024

	2010	2012	2014	2016	2018	2020	2022	2024
Population Estimate	38431	38968	39557	40533	41570	42,938	44,000	45,150

Source: Washington State Office of Financial Management, Small Area Estimate Program

Table A.3 Population Estimates for Douglas County - Urban Growth Areas and Rural County, 2014-2024

Geographical Area	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Rural Douglas County	6,847	6,900	6,965	7,097	7,169	7,281	7,719	7,864	7,910	8,043	8,175
East Wenatchee UGA	27,540	27,917	28,292	28,668	29,132	29,515	29,966	30,433	30,689	30,885	31,237
Bridgeport UGA	2,329	2,315	2,294	2,251	2,211	2,194	2,154	2,123	2,148	2,168	2,215
Rock Island UGA	1,160	1,184	1,287	1,329	1,368	1,463	1,416	1,437	1,561	1,706	1,816
Waterville UGA	1,151	1,159	1,156	1,159	1,150	1,156	1,146	1,152	1,152	1,157	1,162
Mansfield UGA	337	338	342	341	340	340	337	341	341	341	346
Coulee Dam UGA	193	196	197	198	199	201	200	200	200	200	200
Total	39,557	40,008	40,533	41,042	41,570	42,151	42,938	43,550	44,000	44,500	45,150

Source: Washington State Office of Financial Management, Small Area Estimate Program

Table A.4 Population Change - Urban Growth Areas and Rural County, 2015-2024

Geographical Area	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Rural Douglas County	52	66	131	72	112	438	145	46	133	131
East Wenatchee UGA	377	375	376	465	383	451	467	256	197	351
Bridgeport UGA	-14	-20	-43	-40	-17	-40	-31	25	20	47
Rock Island UGA	24	103	42	39	95	-47	21	124	145	110
Waterville UGA	8	-3	3	-9	6	-10	6	0	5	5
Mansfield UGA	1	4	-1	-1	0	-3	4	0	0	5
Coulee Dam UGA	3	1	1	2	2	-1	0	0	0	0

Source: Washington State Office of Financial Management, Small Area Estimate Program

Table A.5 Population Change in Percentage - Urban Growth Areas and Rural County, 2015-2024

Geographical Area	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Rural Douglas County	0.76%	0.95%	1.89%	1.02%	1.57%	6.01%	1.88%	0.58%	1.68%	1.63%
East Wenatchee UGA	1.37%	1.34%	1.33%	1.62%	1.32%	1.53%	1.56%	0.84%	0.64%	1.14%

Bridgeport UGA	-0.60%	-0.88%	-1.89%	-1.76%	-0.77%	-1.84%	-1.44%	1.17%	0.93%	2.18%
Rock Island UGA	2.06%	8.68%	3.27%	2.91%	6.95%	-3.20%	1.49%	8.64%	9.27%	6.44%
Waterville UGA	0.68%	-0.27%	0.26%	-0.77%	0.53%	-0.87%	0.52%	-0.01%	0.43%	0.43%
Mansfield UGA	0.41%	1.07%	-0.32%	-0.17%	-0.08%	-0.92%	1.17%	-0.08%	0.00%	1.47%
Coulee Dam UGA	1.49%	0.52%	0.61%	0.78%	0.88%	-0.54%	0.00%	0.00%	0.00%	0.00%

Source: Washington State Office of Financial Management, Small Area Estimate Program

Table A.6 Douglas County Population Projection 2026-2046

	2026	2028	2030	2032	2034	2036	2038	2040	2042	2044	2046
Low Projection	42,813	43,207	43,585	43,943	44,284	44,606	44,920	45,221	45,511	45,789	46,058
Medium Projection	45,822	46,795	47,750	48,684	49,600	50,496	51,383	52,256	53,118	53,967	54,806
Adopted 2/25	46,409	47,668	48,927	50,186	51,445	52,705	53,964	55,223	56,482	57,741	59,000
High Projection	49,677	51,106	52,515	53,902	55,269	56,615	57,951	59,271	60,580	61,875	63,159

Source: Washington State Office of Financial Management, Small Area Estimate Program

Table A.7 Population Growth Allocation Options for Douglas County (2027-2046)

Geographical Area	Option 1: Allocation based on Jurisdiction-specific Approach	Option 2: Allocation based on 2023 Population Estimates	Option 3: Allocation based on Previous Comp Plan Population Allocation, 2021
Rural Douglas County	15.05%	18.10%	18.00%
East Wenatchee UGA	68.50%	69.40%	72.00%
Rock Island UGA	16.10%	4.90%	6.00%
Waterville UGA	0.10%	3.80%	2.50%
Mansfield UGA	0.15%	2.60%	1.20%
Bridgeport UGA	0.00%	0.80%	0.20%
Coulee Dam UGA	0.10%	0.40%	0.10%

Source: Douglas County Land Services Department, 2023

B. Appendix: Future Housing Demand

Table B.1 Countywide Housing Demand by Income Level, 2020-2046

	% of Area Median Income						Total
	0-30%	30-50%	50-80%	80-100%	100-120%	120%+	
Total Future Housing Needed (2046)	2,034	3,258	5,364	3,027	2,645	8,664	24,992
Estimated Housing Supply (2020)*	978	2,237	3,916	2,244	1,736	4,995	16,106
Net New Housing Needed (2020-2046)	1,056	1,021	1,448	783	909	3,669	8,886

Source: Housing for All Planning Tool, Washington State Department of Commerce

Table B.2 Housing Demand by Region and Income Level, Method C, 2020-2046

Region	Total	0-30%		30-50%	50-80%	80-100%	100-120%	120%+
		Non-PSH	PSH					
Rural Douglas County	1,293	0	0	0	211	114	132	836
East Wenatchee UGA	6,090	847	0	819	993	536	623	2,272
Rock Island UGA	1,386	193	0	186	226	122	142	517
Mansfield UGA	13	2	0	2	2	1	1	5
Waterville UGA	8	1	0	1	1	1	1	3
Coulee Dam UGA	8	1	0	1	1	1	1	3
Bridgeport UGA	88	12	0	12	14	8	9	33

Source: Housing for All Planning Tool, Method C, Washington State Department of Commerce

Table B.3 Estimated Housing Supply by Region and Income Level, 2021-2026

Region	Total	0-30%		30-50%	50-80%	80-100%	100-120%	120%+
		Non-PSH	PSH					
Rural Douglas County	385	0	0	0	0	19	128	238
East Wenatchee UGA	865	0	0	0	0	43	288	534
Rock Island UGA	226	0	0	0	0	11	75	140
Mansfield UGA	8	0	0	0	0	0	3	5
Waterville UGA	14	0	0	0	0	1	5	9
Coulee Dam UGA	0	0	0	0	0	0	0	0
Bridgeport UGA	20	0	0	0	0	1	7	12
Grand Total	1,518	0	0	0	0	76	505	937

Source: WCRER Housing Permit Data; HUD Area Median Incomes; HUD Fair Market Rents

Table B.4 Countywide Housing Demand by Income Level, 2027-2046

	% of Area Median Income						Total
	0-30%	30-50%	50-80%	80-100%	100-120%	120%+	
Total Future Housing Needed (2046)	2,034	3,258	5,364	3,027	2,645	8,664	24,992
Estimated Housing Supply (2027)*	978	2,237	3,916	2,320	2,241	5,932	17,624
Net New Housing Needed (2027-2046)	1,056	1,021	1,448	707	404	2,732	7,368

Source: Housing for All Planning Tool; WCRER Housing Permit Data; HUD Area Median Incomes; HUD Fair Market Rents

Table B.5 Housing Demand by Income Level and Region, Method C, 2027-2046

Region	Total	0-30%		30-50%	50-80%	80-100%	100-120%	120%+
		Non-PSH	PSH					
Rural Douglas County	908	0	0	0	211	95	4	598
East Wenatchee UGA	5,225	847	0	819	993	493	335	1,738
Rock Island UGA	1,160	193	0	186	226	111	67	377
Mansfield UGA	7	2	0	2	2	1	0	0
Waterville UGA	3	1	0	1	1	0	0	0
Coulee Dam UGA	8	1	0	1	1	1	1	3
Bridgeport UGA	68	12	0	12	14	7	2	21

Source: Housing for All Planning Tool, Method C; WCRER Housing Permit Data; HUD Area Median Incomes; HUD Fair Market Rents

Table B.6 Emergency Housing Needs (Temporary), 2020-2046

Region	Method C
Rural Douglas County	0
East Wenatchee UGA	33
Rock Island UGA	7
Mansfield UGA	0
Waterville UGA	0
Coulee Dam UGA	0
Bridgeport UGA	0
Total	40

Source: Housing for All Planning Tool, Methods A and C

C. Appendix: Estimated Housing Supply, 2021-2026 – Determining Affordability

To show the calculations based on PC's assumptions for adjusting the baseline housing unit estimates, the project team used samples of East Wenatchee data from the University of Washington Center for Real Estate Research (WCRER). The WCRER data includes housing permit counts from the Census Bureau's Census Building Permit (CBP) survey, which reports SFH units, two-unit buildings and units, five-plus-unit buildings and units, along with permit values for each across years and months for Douglas County regions.

Step 1: After data were pulled from WCRER, the first step was to determine the dollar value per unit for the permits issued each month. The data are organized by year and month, but not by individual permit. Therefore, PC calculated the average value per unit when there was more than one unit on a permit or in the same month.

Table C.1 East Wenatchee Data Sample for Step 1

Region	Survey Date	Single-Family Units	Single-Family Units value	Value Per Unit
East Wenatchee	July, 2021	1	\$281,255	\$281,255
East Wenatchee	August, 2021	3	\$922,562	\$307,521
East Wenatchee	September, 2021	1	\$375,000	\$375,000

Source: WCRER Housing Permit Data

Step 2: To match the units built with the outcomes from the Housing for All Planning Tool (HAPT), it's necessary to determine the affordability level of the units. For single-family homes (SFH), PC used historical mortgage rate data from the FRED database, a mortgage payment formula, and the value per unit, along with HUD Area Median Incomes data for the year the permit was issued.

Table C.2 HUD AMI Data for Step 2

Year	Area Median Income	Monthly Equivalent	Affordability Threshold ¹
2021	\$70,900	\$5,908	\$1,773
2022	\$78,800	\$6,567	\$1,970
2023	\$80,500	\$6,708	\$2,013

Source: HUD Area Median Incomes

Table C.3 East Wenatchee Data Sample for Step 2

Survey Date	Total Units	Value Per Unit	Mortgage Rate	Monthly Payment	% of Affordability Threshold	Affordability Level
July, 2021	1	\$281,255	2.9%	\$1,083	61.1%	50-80% AMI
August, 2021	3	\$307,521	2.8%	\$1,188	67.0%	50-80% AMI
September, 2021	1	\$375,000	2.9%	\$1,478	83.4%	80-100% AMI

Source: WCRER Housing Permit Data; HUD Area Median Incomes

¹ Housing and Urban Development (HUD) defines cost burdened status as individuals or households that spend 30% or more of their gross monthly income on housing costs (including utilities). Defined here, the affordability threshold is the monthly payment the median household can pay before being cost-burdened. That is, paying the affordability threshold or below in monthly housing costs makes the unit affordable.

Step 3: Repeat Steps 1 and 2 for two-unit structures (duplexes).

Table C.4 East Wenatchee Data Sample for Two-Unit Structures, Step 1

Region	Survey Date	2-unit buildings	2-unit units	2-unit buildings value	Value Per Unit
East Wenatchee	October, 2022	1	2	\$535,000	\$267,500

Source: WCRER Housing Permit Data

Table C.5 East Wenatchee Data Sample for Two-Unit Structures, Step 2

Region	Survey Date	2-unit units	Value Per Unit	Mortgage Rate	Monthly Payment	% of Affordability Threshold	Affordability Level
East Wenatchee	October, 2022	2	\$267,500	6.9%	\$1,630	82.7%	80-100%

Source: WCRER Housing Permit Data; HUD Area Median Incomes

Step 4: The last category of units in the WCRER data consists of five-plus-unit structures, which are equivalent to apartment buildings. Determining the affordability of these units requires a different approach than using a mortgage payment formula. Instead, PC used the two-bedroom HUD Fair Market Rent (FMR) as the monthly payment value for these units, rather than a mortgage payment. The two-bedroom rate was selected as a median value for all units, since the data does not break down units by bedroom number.

Table C.6 HUD Two-Bedroom Fair Market Rents (FMRs) by Year for the Wenatchee MSA

Year	HUD FMR
2021	\$1,107
2022	\$1,126
2023	\$1,262

Source: HUD Fair Market Rents

Table C.7 East Wenatchee Data Sample for Step 4

Region	Survey Date	5+ unit buildings	5+ unit units	5+ unit building value	HUD FMR
East Wenatchee	July, 2023	1	10	\$1,681,921	\$1,262

Source: WCRER Housing Permit Data; HUD Fair Market Rents

Step 5: The affordability level must be determined using the HUD Fair Market Rents.

Table C.8 East Wenatchee Data Sample for Step 5

Region	Survey Date	5+ unit units	HUD FMR	% of Affordability Threshold	Affordability Level
East Wenatchee	July, 2023	10	\$1,262	57.2%	50-80% AMI

Source: WCRER Housing Permit Data; HUD Area Median Incomes; HUD Fair Market Rents

Step 6: After Steps 1 through 5 were completed for all regions (including Unincorporated Douglas County), PC tallied all units across affordability levels across years. Each Year for East Wenatchee is shown below.

Table C.9 East Wenatchee Unit Tallies, 2021

AMI	SFH	2-unit	5+ unit
0-30%	0	0	0
30-50%	0	0	0
50-80%	6	0	0
80-100%	1	0	0
100-120%	0	0	0
120%+	0	0	0

Source: WCRER Housing Permit Data; HUD Area Median Incomes; HUD Fair Market Rents

Table C.10 East Wenatchee Unit Tallies, 2022

AMI	SFH	2-unit	5+unit
0-30%	0	0	0
30-50%	0	0	0
50-80%	0	0	20
80-100%	2	2	0
100-120%	0	0	0
120%+	0	0	0

Source: WCRER Housing Permit Data; HUD Area Median Incomes; HUD Fair Market Rents

Table C.11 East Wenatchee Unit Tallies, 2023

AMI	SFH	2-unit	5+unit
0-30%	0	0	0
30-50%	0	2	0
50-80%	0	0	10
80-100%	0	0	0
100-120%	0	0	0
120%+	0	0	0

Source: WCRER Housing Permit Data; HUD Area Median Incomes; HUD Fair Market Rents

Step 7: After tallying all units across affordability levels, PC used a three-year moving average to project unit values in 2024, 2025, and 2026. The projections are shown in the tables below.

Table C.12 East Wenatchee 2024 Unit Projections

AMI	2021	2022	2023	3-year average
0-30%	0	0	0	0
30-50%	0	0	2	0.7
50-80%	6	20	10	12
80-100%	1	4	0	1.7
100-120%	0	0	0	0
120%+	0	0	0	0

Source: WCRER Housing Permit Data; HUD Area Median Incomes; HUD Fair Market Rents

Table C.13 East Wenatchee 2025 Unit Projections

AMI	2022	2023	2024 projected	3-year average
0-30%	0	0	0	0
30-50%	0	2	0.7	0.9
50-80%	20	10	12	14
80-100%	4	0	1.7	1.9
100-120%	0	0	0	0
120%+	0	0	0	0

Source: WCRER Housing Permit Data; HUD Area Median Incomes; HUD Fair Market Rents

Table C.14 East Wenatchee 2026 Unit Projections

AMI	2023	2024 projected	2025 projected	3-year average
0-30%	0	0	0	0
30-50%	2	0.7	0.9	1.2
50-80%	10	12	14	12
80-100%	0	1.7	1.9	1.2
100-120%	0	0	0	0
120%+	0	0	0	0

Source: WCRER Housing Permit Data; HUD Area Median Incomes; HUD Fair Market Rents

Table C.15 East Wenatchee Final Unit Projections

AMI	Projected Units 2024-2026	Estimated Units added 2021-2026
0-30%	0	0
30-50%	2	4
50-80%	38	74
80-100%	4	9
100-120%	0	0
120%+	0	0

Source: WCRER Housing Permit Data; HUD Area Median Incomes; HUD Fair Market Rents

Step 8: Because Douglas County jurisdictions plan for the Urban Growth Areas and the CBP captures cities, PC had to account for an adjustment. The estimated 2021 through 2026 housing units in Unincorporated Douglas County (which includes Urban Growth Areas not in a jurisdiction’s city limits) were distributed to cities to account for their Urban Growth Areas. The Distributions were made according to unit breakdowns from HAPT Method C.

Table C.16 Housing Unit and Distribution Breakdowns, 2020

Region	Housing Units	Housing Unit Shares of Total UGAs and Rural
East Wenatchee Zone B ²	5,778	66.2%
Rock Island Zone B	48	0.5%
Rural Douglas County (Outside of UGAs)	2,885	33.1%
Total	8,711	99.8%

Source: Housing for All Planning Tool, Method C

Table C.17 Total Unincorporated Douglas County Unit Projections and Distributions

AMI	Projected Housing Units 2021-2026 Unincorporated Douglas County	To be distributed to EW	To be distributed to to RI	To be distributed to Rural Douglas
0-30%	0	0	0	0
30-50%	6	6	0	0
50-80%	451	299	2	149
80-100%	220	146	1	73
100-120%	323	214	2	107
120%+	170	113	1	56

Source: WCRER Housing Permit Data; HUD Area Median Incomes; HUD Fair Market Rents; Housing for All Planning Tool, Method C

² Zones are defined [here](#). Zone B is the area in a jurisdiction’s Urban Growth Area, but outside of its city limits.

Table C.18 Final 2026 Baseline Unit Adjustment

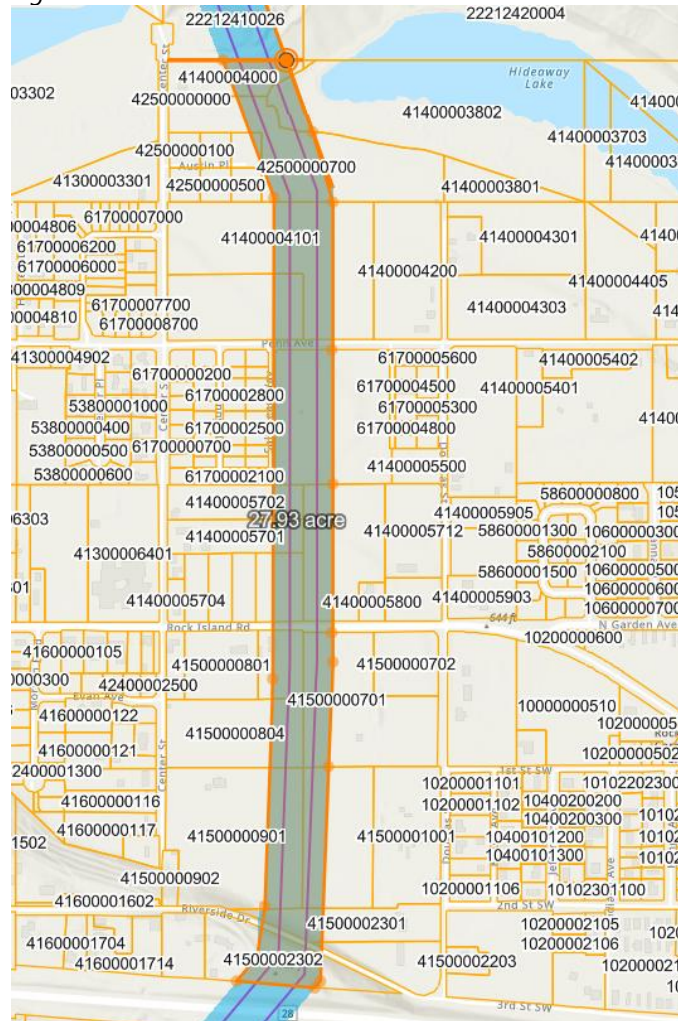
Region	0-30%	30-50%	50-80%	80-100%	100-120%	120%+	Total
Bridgeport UGA	0	2	2	12	4	0	20
Coulee Dam UGA	0	0	0	0	0	0	0
East Wenatchee UGA	0	10	373	155	214	113	865
Mansfield UGA	0	0	6	0	0	2	8
Rock Island UGA	0	96	6	1	122	1	226
Waterville UGA	0	5	0	4	5	0	14
Rural Douglas County	0	0	149	73	107	56	385
Grand Total	0	113	536	245	452	172	1,518

Source: WCRER Housing Permit Data; HUD Area Median Incomes; HUD Fair Market Rents; Housing for All Planning Tool, Method C

D. Appendix: Electrical Easements in Rock Island UGA

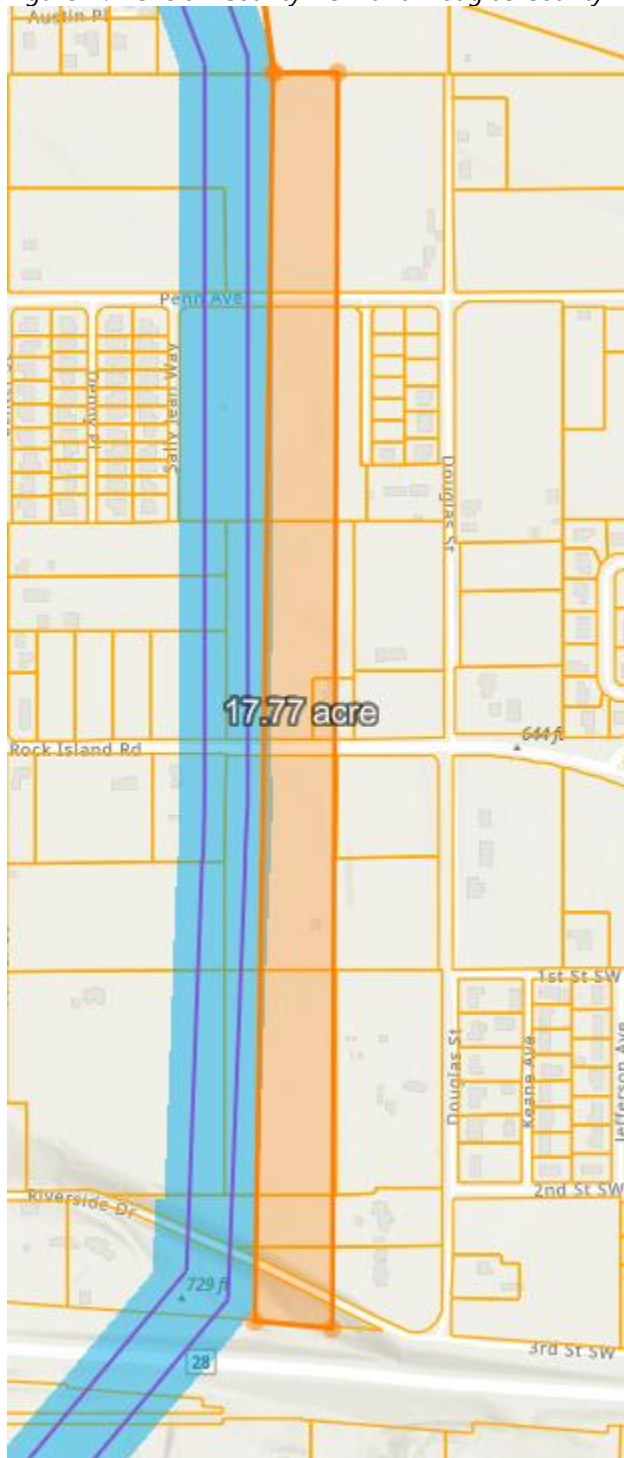
A large Bonneville Power Administration (BPA) easement runs through the R-L zone in Rock Island. To account for the area under these easements being ineligible for residential development, PC downloaded data from the BPA Transmission Assets page.³ By combining GIS shapefiles from BPA’s website with Douglas County parcel data from the County GIS, the project team calculated the land area covered by the easement on each parcel. PC subtracted approximately 28 acres from the eligible vacant R-L land in Rock Island. We also subtracted approximately 18 acres from eligible vacant R-L land due to Chelan County PUD and Douglas County PUD electrical easements.

Figure D.1 BPA Electrical Easement in Rock Island UGA



³ Bonneville Power Administration, “Transmission Assets,” <https://bpagis.maps.arcgis.com/apps/webappviewer/index.html?id=275cd78c003349719b28f7130d4b933e>.

Figure D.2 Chelan County PUD and Douglas County PUD Electrical Easements in Rock Island UGA



E. Appendix: Methodology to create Land Inventory

East Wenatchee

To show the calculations done using PC's assumptions (shown in Figure 4.1 through Figure 4.6 and Figure 4.8), the project team used East Wenatchee UGA as an example here. In Table A.4, the Final Rounded Potential Unit Estimate column shows the Total UGA Housing Unit Potential in Figure 4.4 of the report. PC replicated this four-step process for each UGA and City Limit of each jurisdiction in Douglas County. After excluding parcels based on eligibility criteria and filtering down to those with an improvement value of \$10,000 or less, the process is as follows:

Table E.1 Step 1 – Subtract Steep Slope and Floodplain Acreage, East Wenatchee

Zone	Total Acres	Subtract Steep Slope Acres	Subtract Floodplain Acres	Gross Acres
R-L	936.5	384.7	22.5	529.2
R-M	188.2	14.5	2.5	171.2
R-H	23.2	0.0	0.0	23.2
MU	1.2	0.0	0.0	1.1

Source: Douglas County Land Services Department, 2024

Table E.2 Step 2 – Aggregate Acreage Per Zone and Apply Market Factor Reduction, East Wenatchee

Zone	Gross Acres	Multiply by Market Factor	MF Adjusted Acres
RL	529.2	75%	396.9
RM	171.2	75%	128.4
RH	23.2	75%	17.4
MU	1.1	75%	0.8

Source: Douglas County Land Services Department, 2024

Table E.3 Step 3 – Apply Public Use/Right of Way Factor Reduction, East Wenatchee

Zone	MF Adjusted Acres	Multiply by Public Use/Right of Way Factor	MF & PU Adjusted Acres
RL	396.9	75%	297.7
RM	128.4	75%	96.3
RH	17.4	75%	13.0
MU	0.8	75%	0.6

Source: Douglas County Land Services Department, 2024

Table E.4 Step 4 – Apply Density Assumption and Round Housing Estimates, East Wenatchee

Zone	MF & PU Adjusted Acres	Multiply by Density Assumption	Potential Housing Units	Final Rounded Potential Unit Estimate
RL	297.7	4	1,190.75	1,191
RM	96.3	12	1,155.39	1,155
RH	13.0	8	104.36	104
MU	0.6	10	6.19	6

Source: Douglas County Land Services Department, 2024

Rock Island

The process for parcels in Rock Island are shown in Table E.5-E.8.

Table E.5 Step 1 – Subtract Steep Slope and Floodplain Acreage, Rock Island

Zone	Total Acres	Subtract Steep Slope Acres	Subtract Floodplain Acres	Gross Acres
R-L	90.3	3.0	13.0	74.2
M-R	27.0	11.4	0.0	15.6

Source: Douglas County Land Services, 2024

Table E.6 Step 2 – Aggregate Acreage Per Zone and Apply Market Factor Reduction, Rock Island

Zone	Gross Acres	Multiply by Market Factor	MF Adjusted Acres
R-L	74.21	75%	55.7
M-R	15.61	75%	11.7

Source: Douglas County Land Services, 2024

Table E.7 Step 3 – Apply Public Use/Right of Way Factor Reduction, Rock Island

Zone	MF Adjusted Acres	Multiply by Public Use/Right of Way	MF & PU Adjusted Acres
R-L	55.7	75%	41.7
M-R	11.7	75%	8.8

Source: Douglas County Land Services, 2024

Table E.8 Step 4 – Apply Density Assumption and Round Housing Estimates, Rock Island

Zone	MF & PU Adjusted Acres	Density Assumption	Potential Housing Units	Final Rounded Housing Unit Estimate
R-L	41.7	4	166.98	167
M-R	8.8	8	70.25	70

Source: Douglas County Land Services, 2024

F. Appendix: Vacant Land Inventory

Table F.1 Vacant Land Inventory and Potential Housing Unit Supply - Douglas County

Geographical Area	Vacant Land in Acres	Potential Housing Units Supply
Rural Douglas County	109	550
East Wenatchee UGA	407.6	2,683
Bridgeport UGA	55.7	520
Rock Island UGA	50.5	237
Waterville UGA	39.9	177
Mansfield UGA	9.2	37
Coulee Dam UGA	0.1	0

Source: Douglas County Land Services Department, 2024

Table F.2 Vacant Land Inventory and Potential Housing Unit Supply - Rural Douglas County

Zoning District	Vacant Land in Acres	Potential Housing Units
AC-10	2,731	273
AC-5	73	15
A-D	299,607	14,980
RR-2	64	32
RR-20	82,785	4,139
RR-5	5,005	1,001
R-REC	60	180
RSC	148	444

Source: Douglas County Land Services Department, 2024

Table F.3 Vacant Land Inventory and Potential Housing Unit Supply - Rural Douglas County (Community-Specific)

Community	Zone	Acreage	Number of Parcels	Potential Housing Units
Suncove	RSC	7.1	6	35
Bridgeport Bar	RSC	67.8	23	339
South of Bridgeport Bar	RSC	0.0	0	0
Orondo	RSC	33.0	16	165
Bauer's Landing	R-REC	0.0	0	0
Trinidad	R-REC	2.0	2	10
Total	-	109.9	47	550

Source: Douglas County Land Services Department, 2024

Table F.4 Vacant Land Inventory and Potential Housing Units Supply - East Wenatchee UGA

Geographical Limits	R-L	R-M	R-H	M-U	Wenatchi Landing	Total
	Acreage					
UGA (Within City Limits)	15.3	2.1	4.8	0.0	-	22.1
UGA (Unincorporated)	282.4	94.2	8.3	0.6	-	385.5
Total UGA	297.7	96.3	13.0	0.6	-	407.6
Housing Unit Potential						
UGA (Within City Limits)	61	25	38	0	-	124
UGA (Unincorporated)	1,130	1,130	66	6	227	2,332
Total UGA	1,191	1,155	104	6	227	2,683

Source: Douglas County Land Services Department, 2024

Table F.5 Vacant Land Inventory and Potential Housing Units Supply - Rock Island UGA

Geographical Limits	R-L	M-R	Total
	Acreage		
UGA (Within City Limits)	27.4	3.4	30.7
UGA (Unincorporated)	4.4	5.4	19.8
Total UGA	31.8	8.8	40.6

Housing Unit Potential				
UGA (Within City Limits)		109	27	136
UGA (Unincorporated)		18	43	61
Total UGA		127	70	197

Source: Douglas County Land Services Department, 2024

Table F.6 Vacant Land Inventory and Potential Housing Units Supply: Bridgeport UGA

Geographical Limits	R-1	R-2	R-3	Total
Acreage				
UGA (Within City Limits)	9.0	1.9	5.7	16.5
UGA (Unincorporated)	18.4	1.1	19.7	39.1
Total UGA	27.4	2.9	25.4	55.7
Housing Unit Potential				
UGA (Within City Limits)	36	19	85	140
UGA (Unincorporated)	74	10	296	380
Total UGA	110	29	381	520

Source: Douglas County Land Services Department, 2024

Table F.7 Vacant Land Inventory and Potential Housing Units Supply: Waterville UGA

Geographical Limits	R-1	R-2	Total
Acreage			
UGA (Within City Limits)	30.6	0.0	30.6
UGA (Unincorporated)	6.4	2.9	9.3
Total UGA	37.0	2.9	39.9
Housing Unit Potential			
UGA (Within City Limits)	122	0	122
UGA (Unincorporated)	26	29	55
Total UGA	148	29	177

Source: Douglas County Land Services Department, 2024

Table F.8 Vacant Land Inventory and Potential Housing Units Supply: Mansfield UGA

Geographical Limits	R1	R2	Total
Acreage			
UGA (Within City Limits)	7.3	0.0	7.3
UGA (Unincorporated)	1.9	0.0	1.9
Total UGA	9.2	0.0	9.2
Housing Unit Potential			
UGA (Within City Limits)	29	0	29
UGA (Unincorporated)	8	0	8
Total UGA	37	0	37

Source: Douglas County Land Services Department, 2024

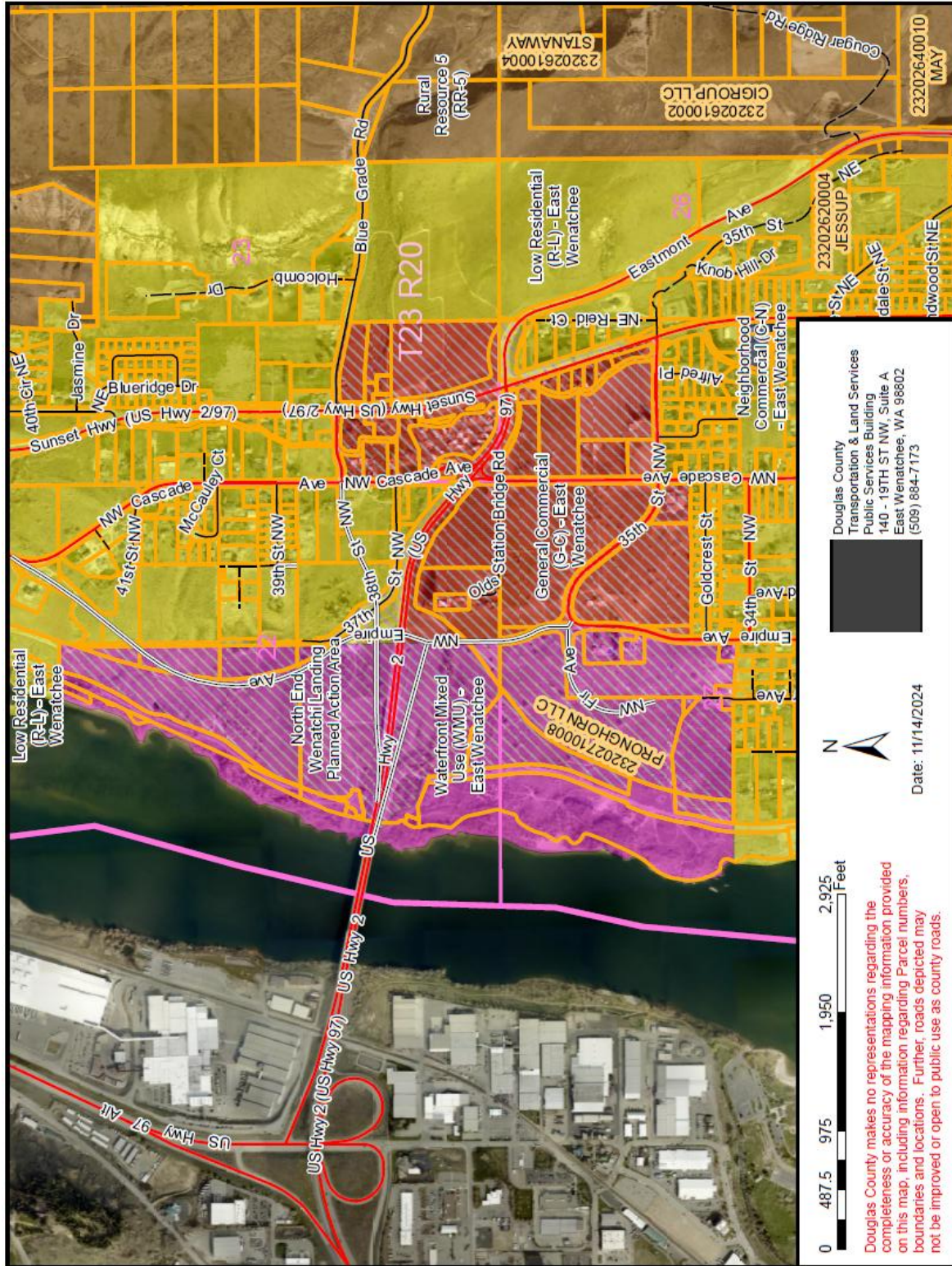
Table F.9 Vacant Land Inventory and Potential Housing Units Supply: Coulee Dam Part UGA

Geographical Limits	R1	R2	R3	SR	Total
Acreage					
UGA (Within City Limits)	0.1	0.0	0.0	0.0	0.1
UGA (Unincorporated)	0.0	0.0	0.0	0.0	0.0
Total UGA	0.1	0.0	0.0	0.0	0.1
Housing Unit Potential					
UGA (Within City Limits)	0	0	0	0	0
UGA (Unincorporated)	0	0	0	0	0
Total UGA	0	0	0	0	0

Source: Douglas County Land Services Department, 2024

G. Appendix: Wenatchi Landing Map

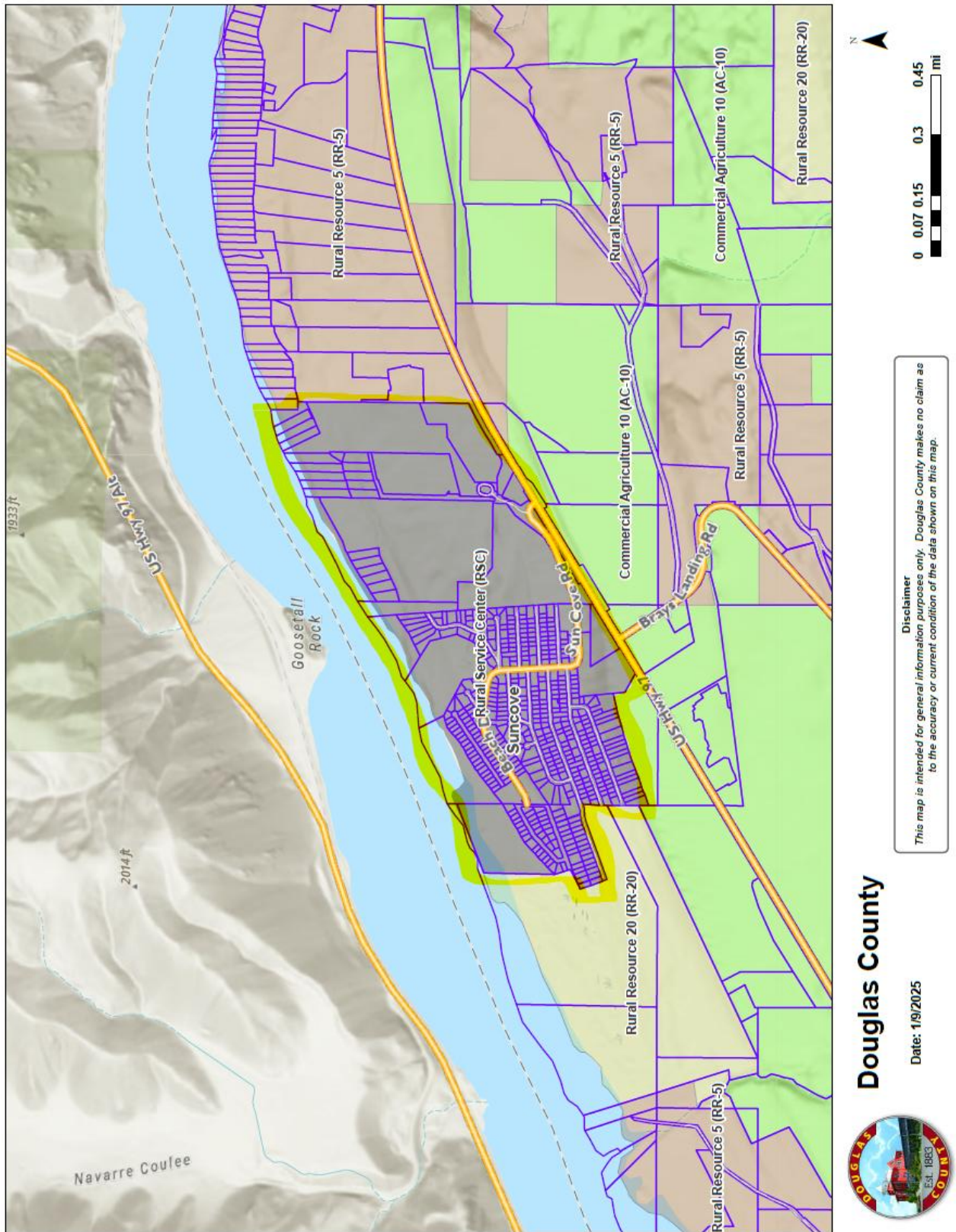
Figure G.1 Map of Wenatchi Landing



Source: Douglas County Land Services Department

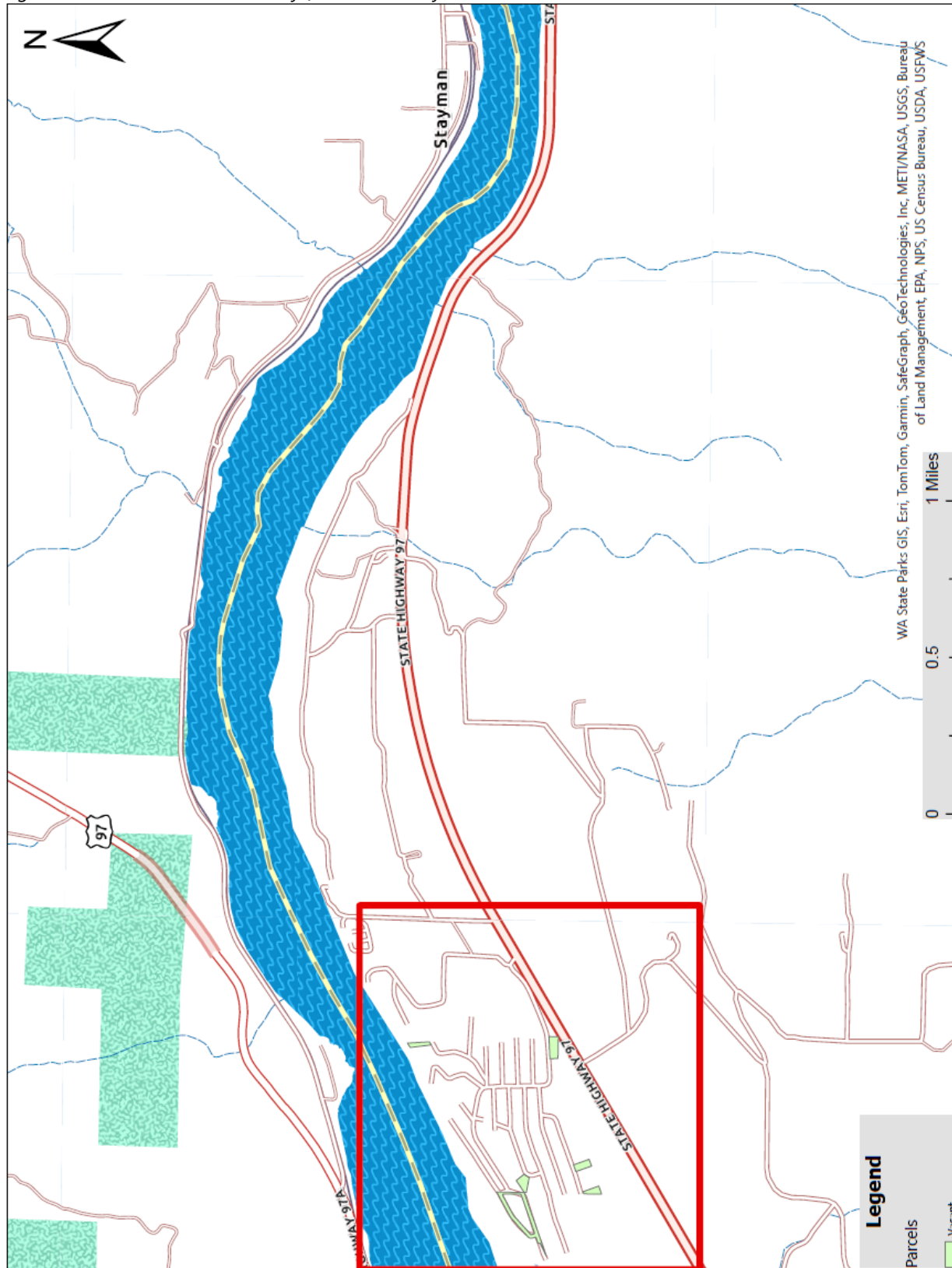
H. Appendix: Douglas County Rural Communities Maps

Figure H.1 Rural Douglas County Community Suncover – RSC-zoned Parcels



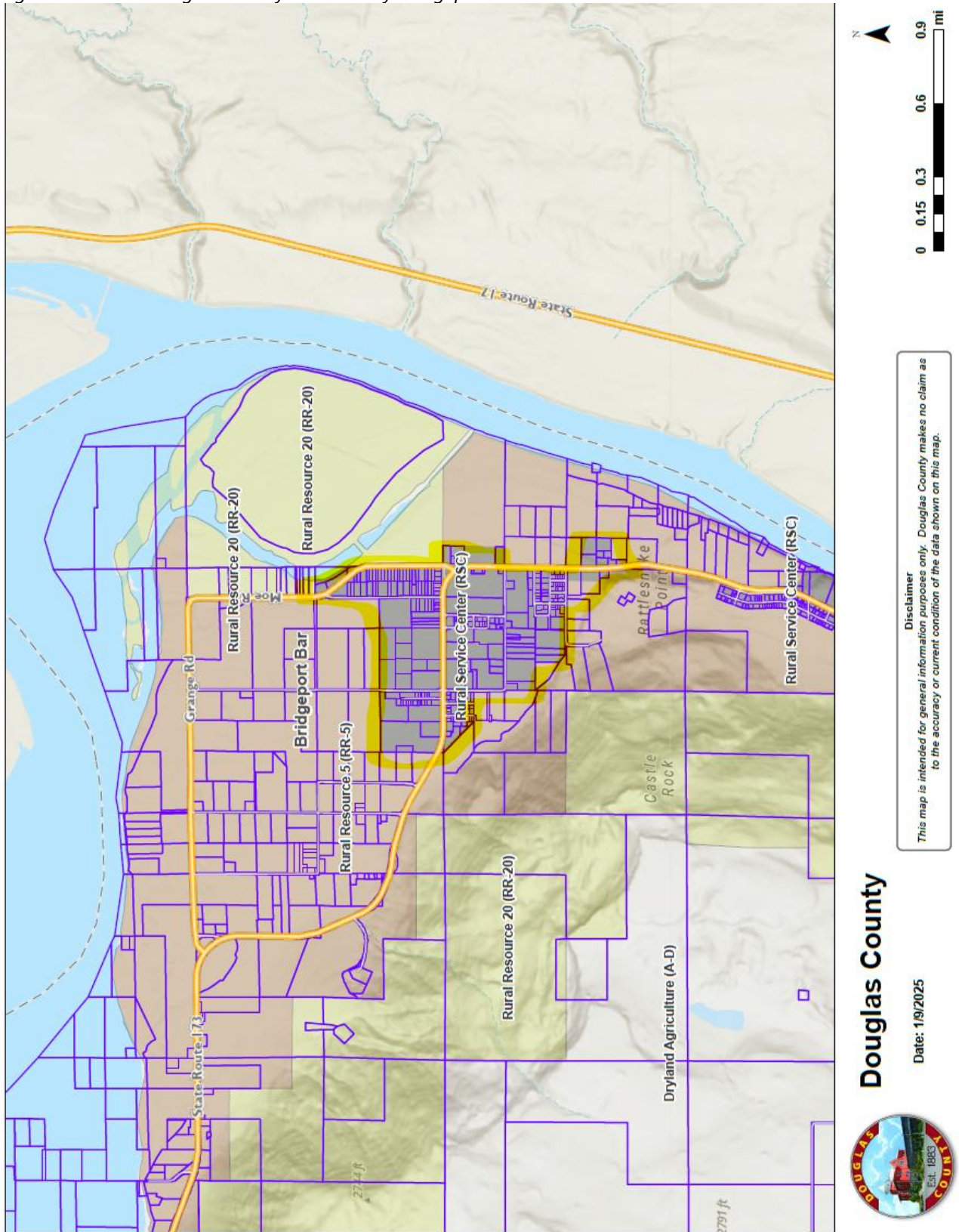
Source: Douglas County Land Services Department Data, 2025

Figure H.2 Vacant Land Inventory for Community Suncove – RSC-zoned Parcels



Source: Douglas County Land Services Department Data, 2024

Figure H.3 Rural Douglas County Community Bridgeport Bar – RSC-zoned Parcels



Source: Douglas County Land Services Department Data, 2025

Figure H.4 Vacant Land Inventory for Community Bridgeport Bar – RSC-zoned Parcels

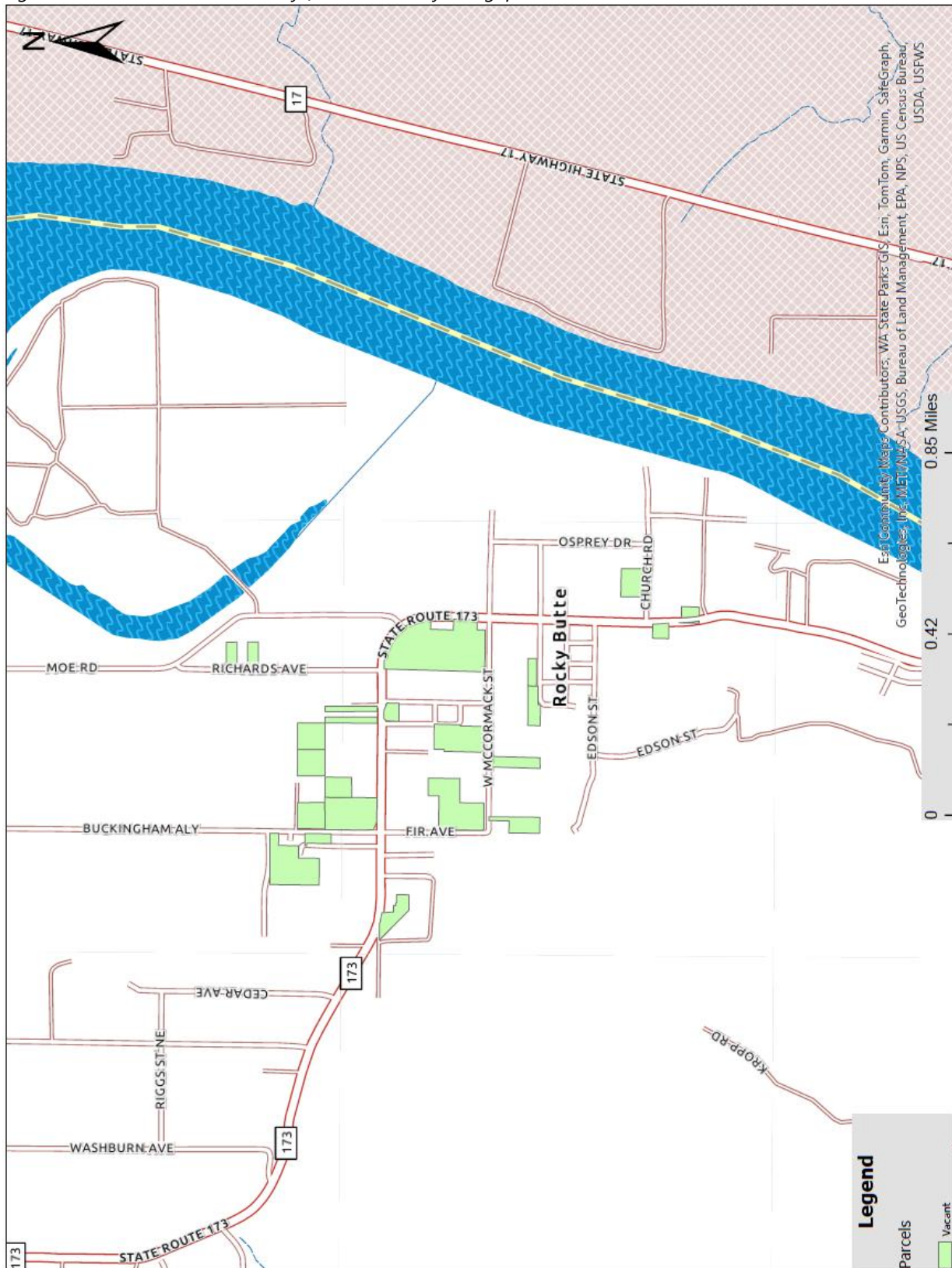
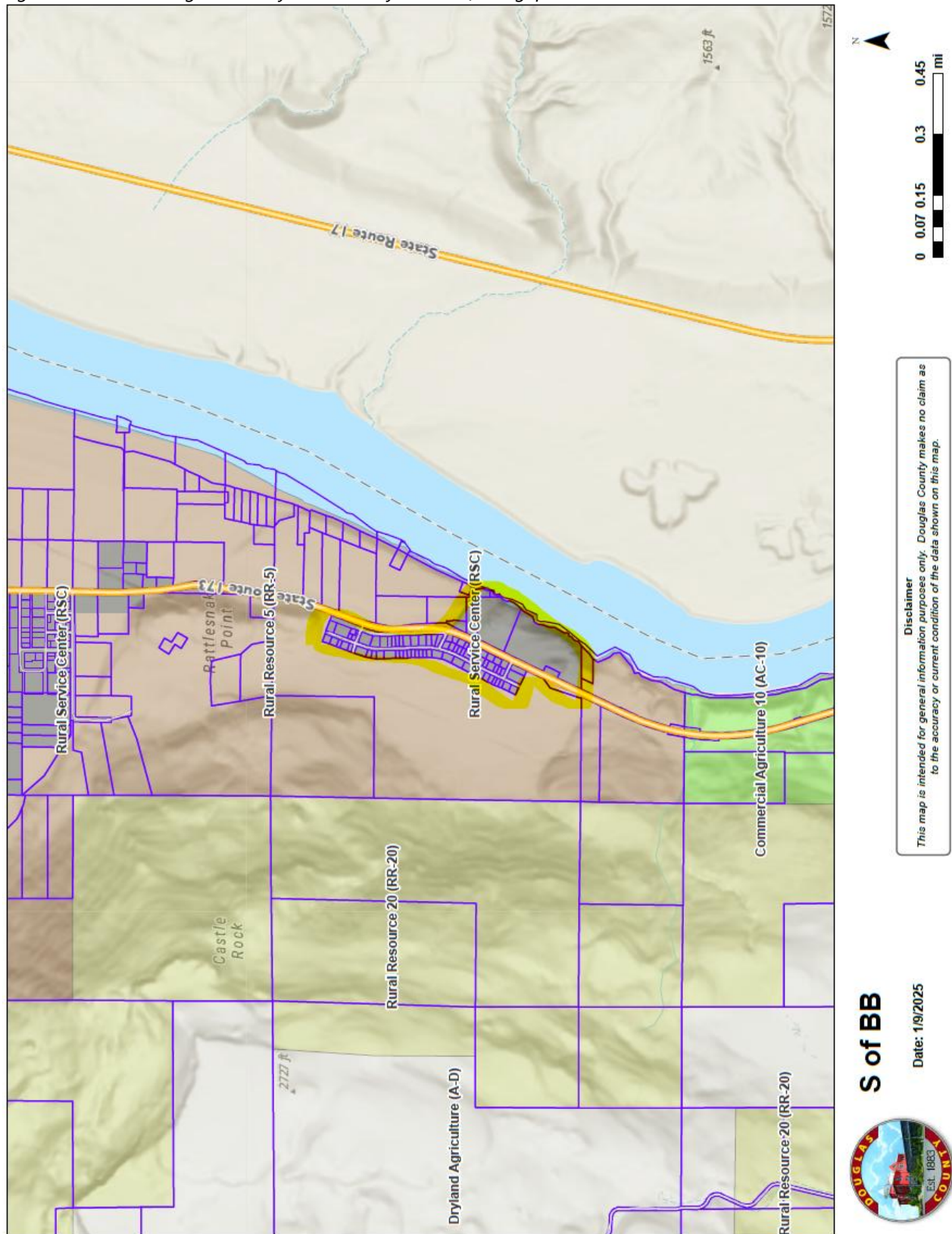
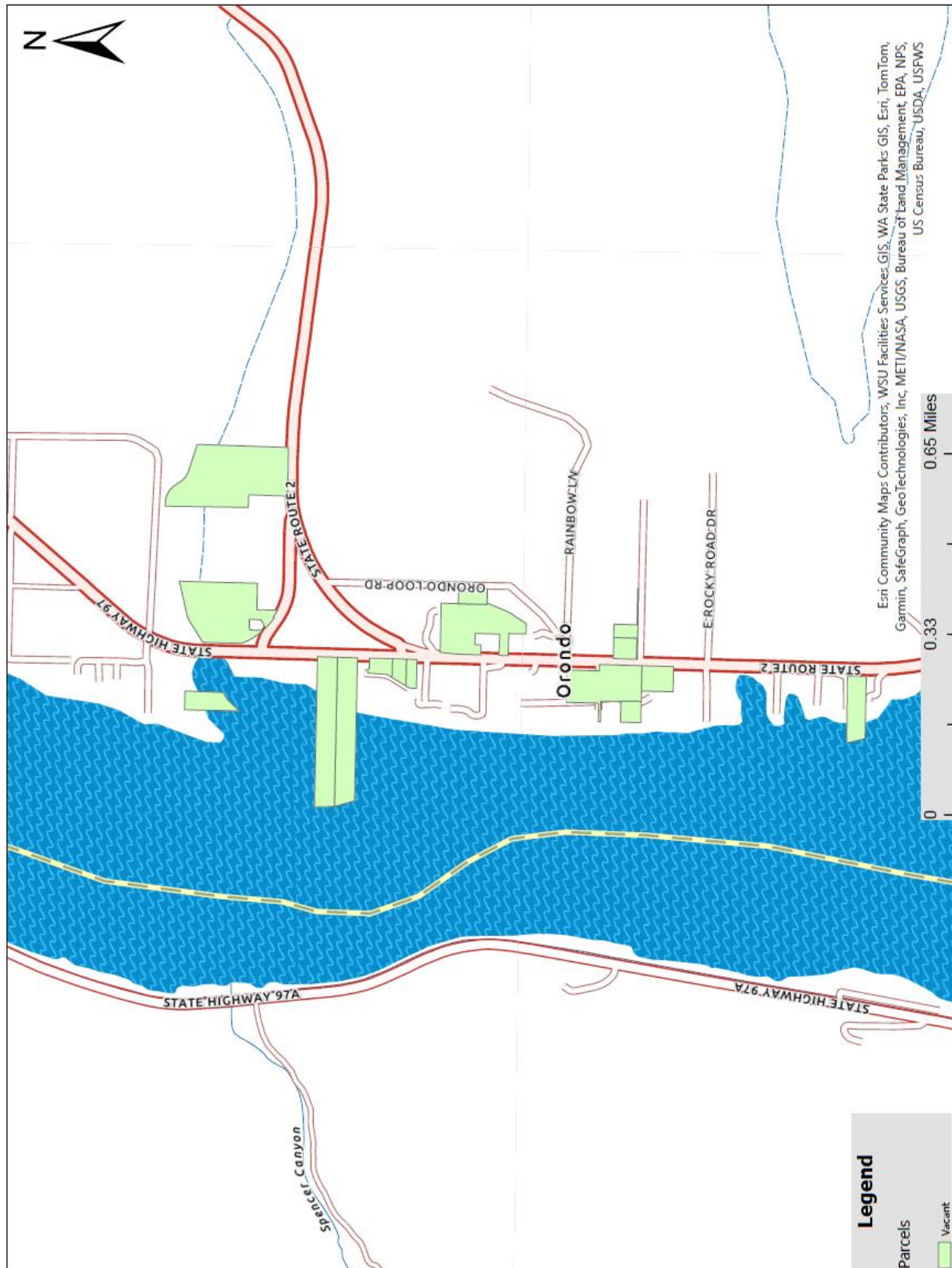


Figure H.5 Rural Douglas County Community South of Bridgeport Bar – RSC-zoned Parcels



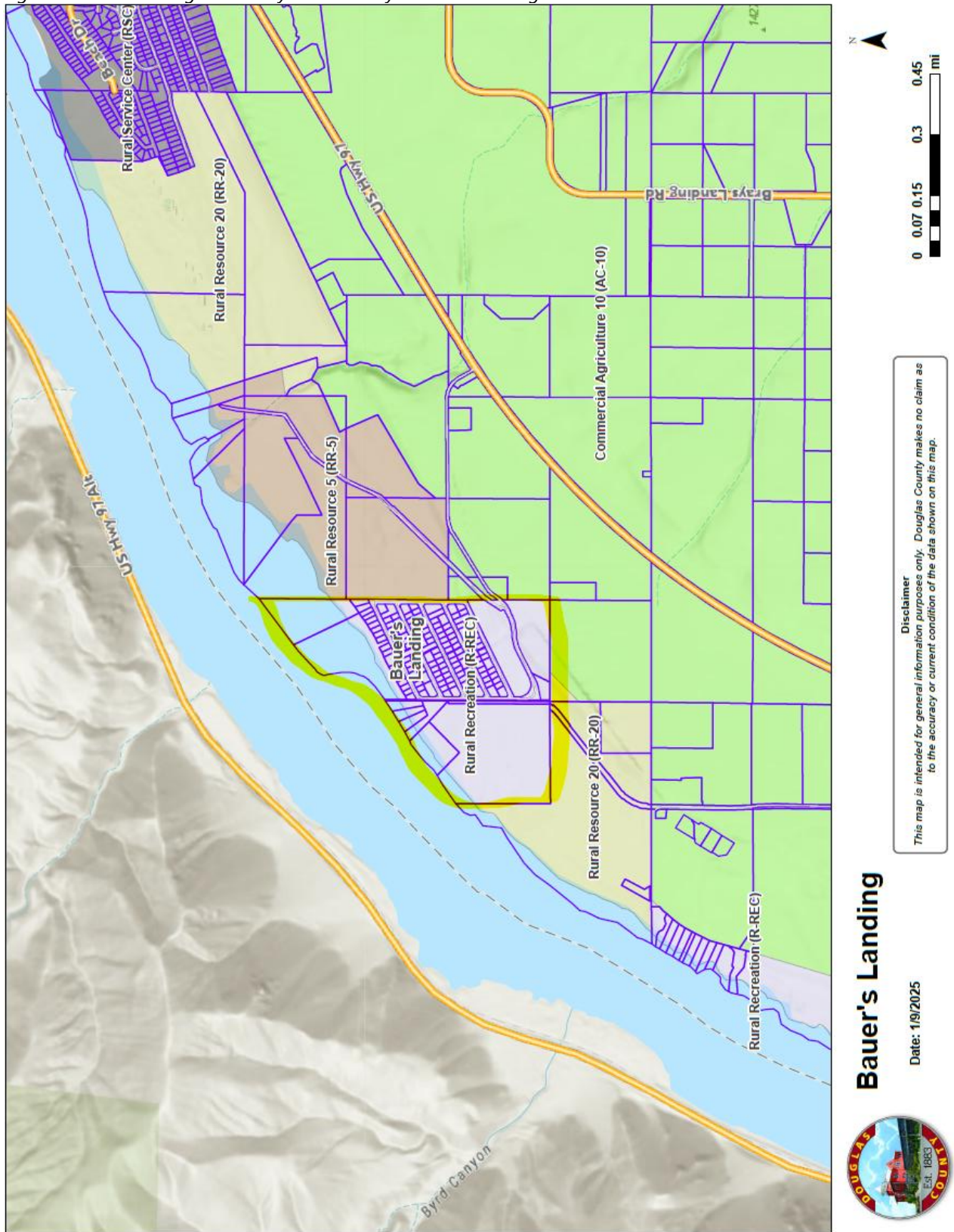
Source: Douglas County Land Services Department Data, 2025

Figure H.7 Vacant Land Inventory for Community Orondo – RSC-zoned Parcels



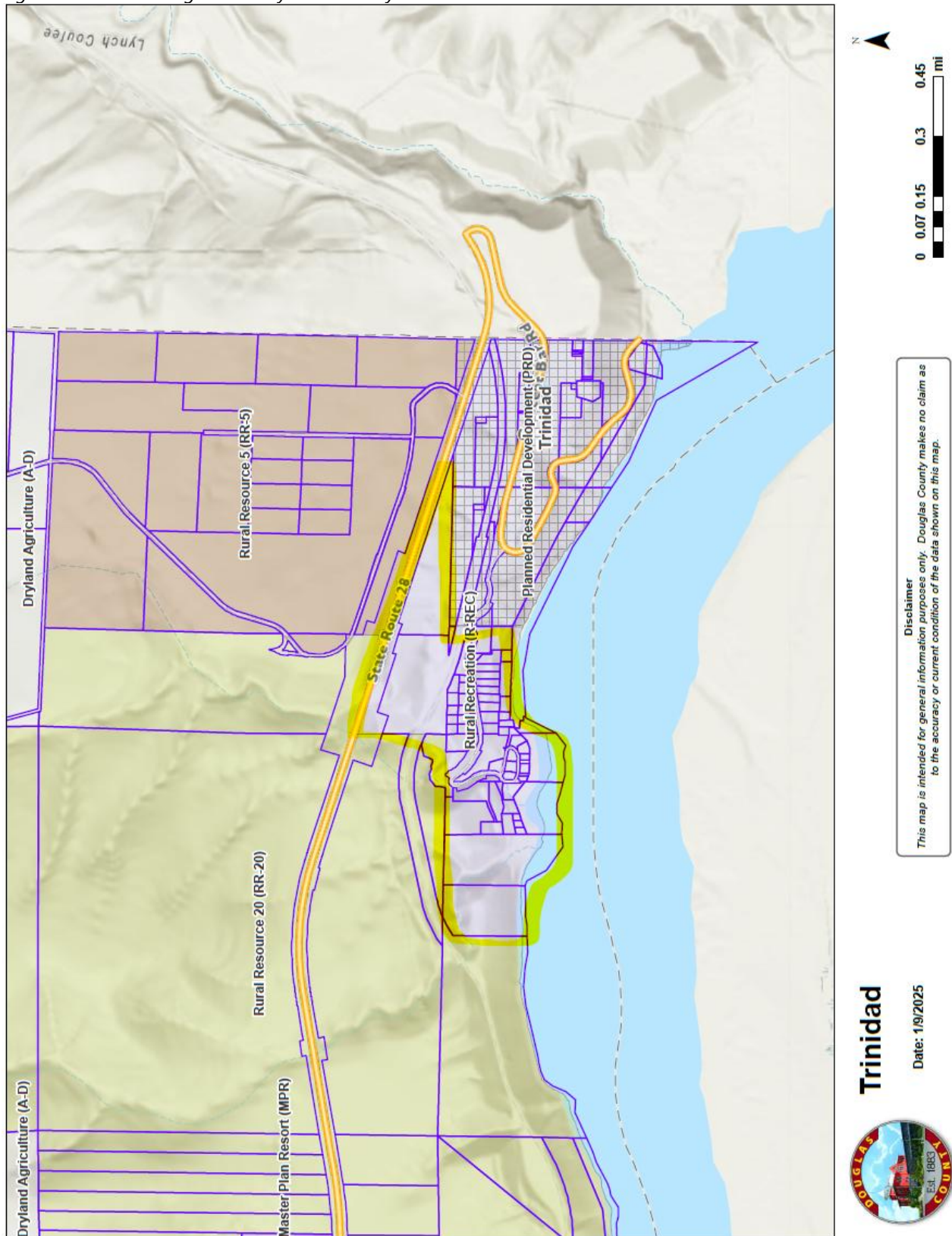
Source: Douglas County Land Services Department Data, 2024

Figure H.8 Rural Douglas County Community Bauer's Landing – R-REC-zoned Parcels⁴



Source: Douglas County Land Services Department Data, 2025

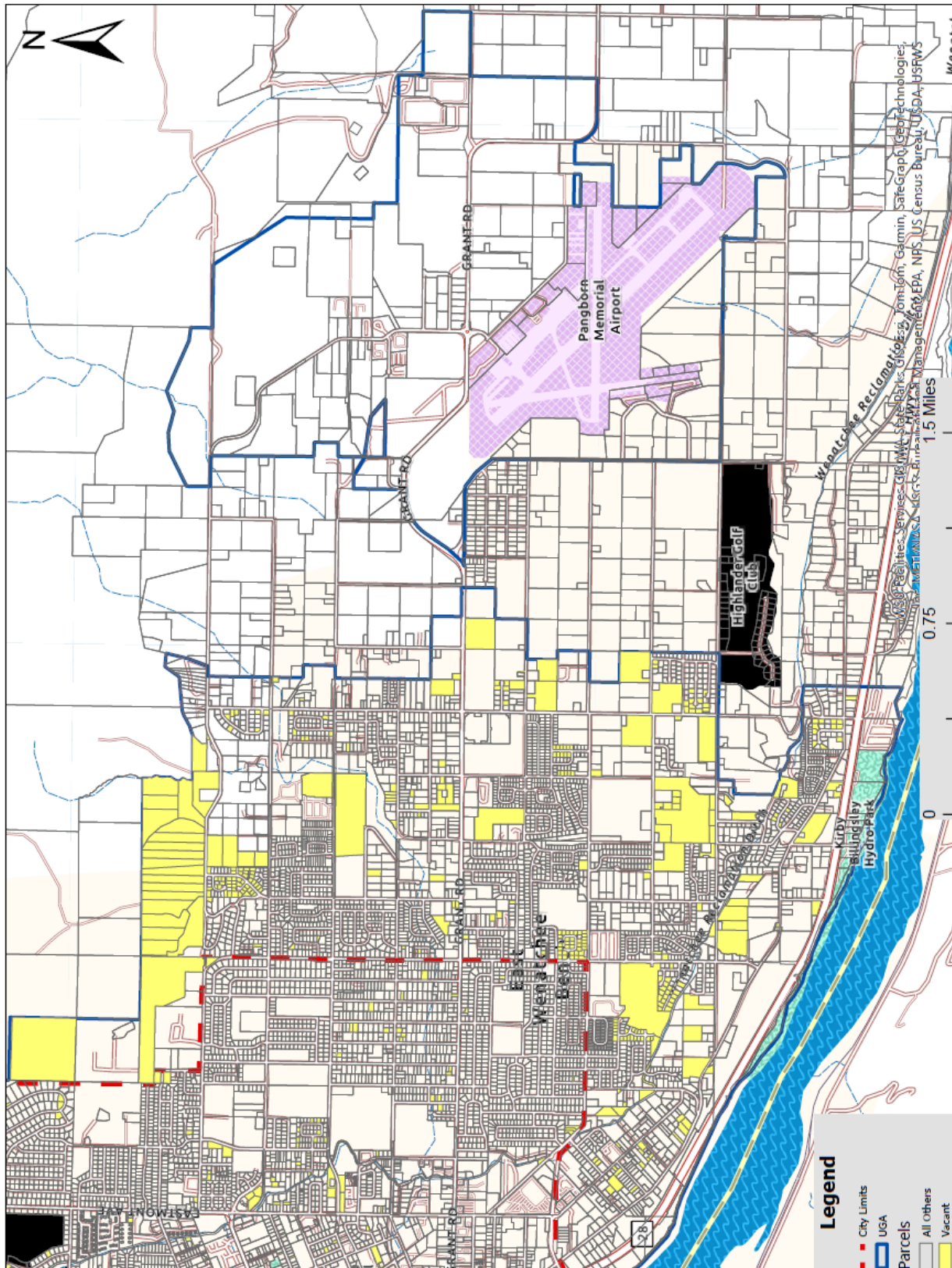
Figure H.9 Rural Douglas County Community Trinidad - R-REC-zoned Parcels



Source: Douglas County Land Services Department Data, 2025

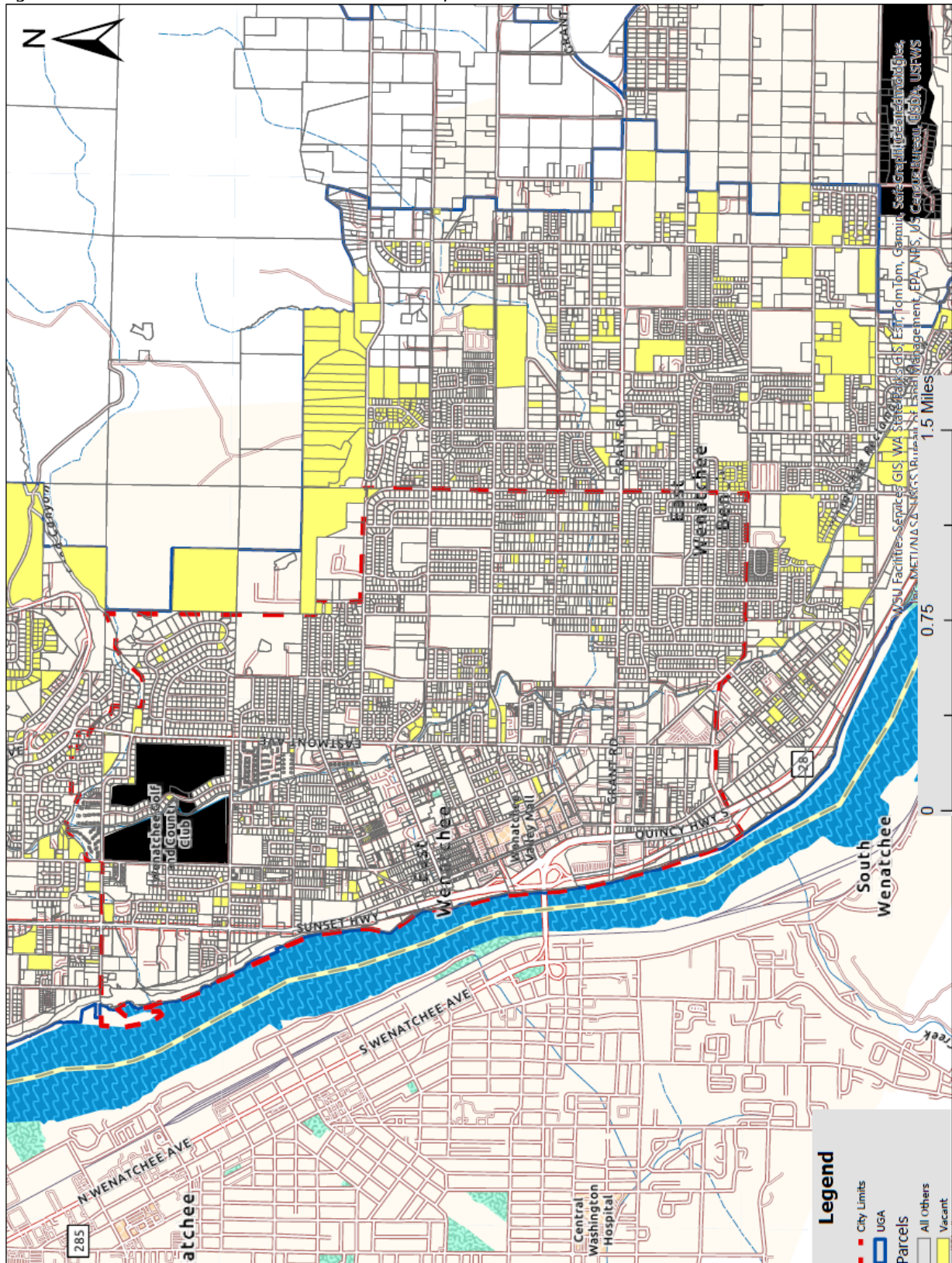
I. Appendix: Vacant Land Inventory Maps

Figure I.1 East Wenatchee SE 1 Vacant Parcels Map



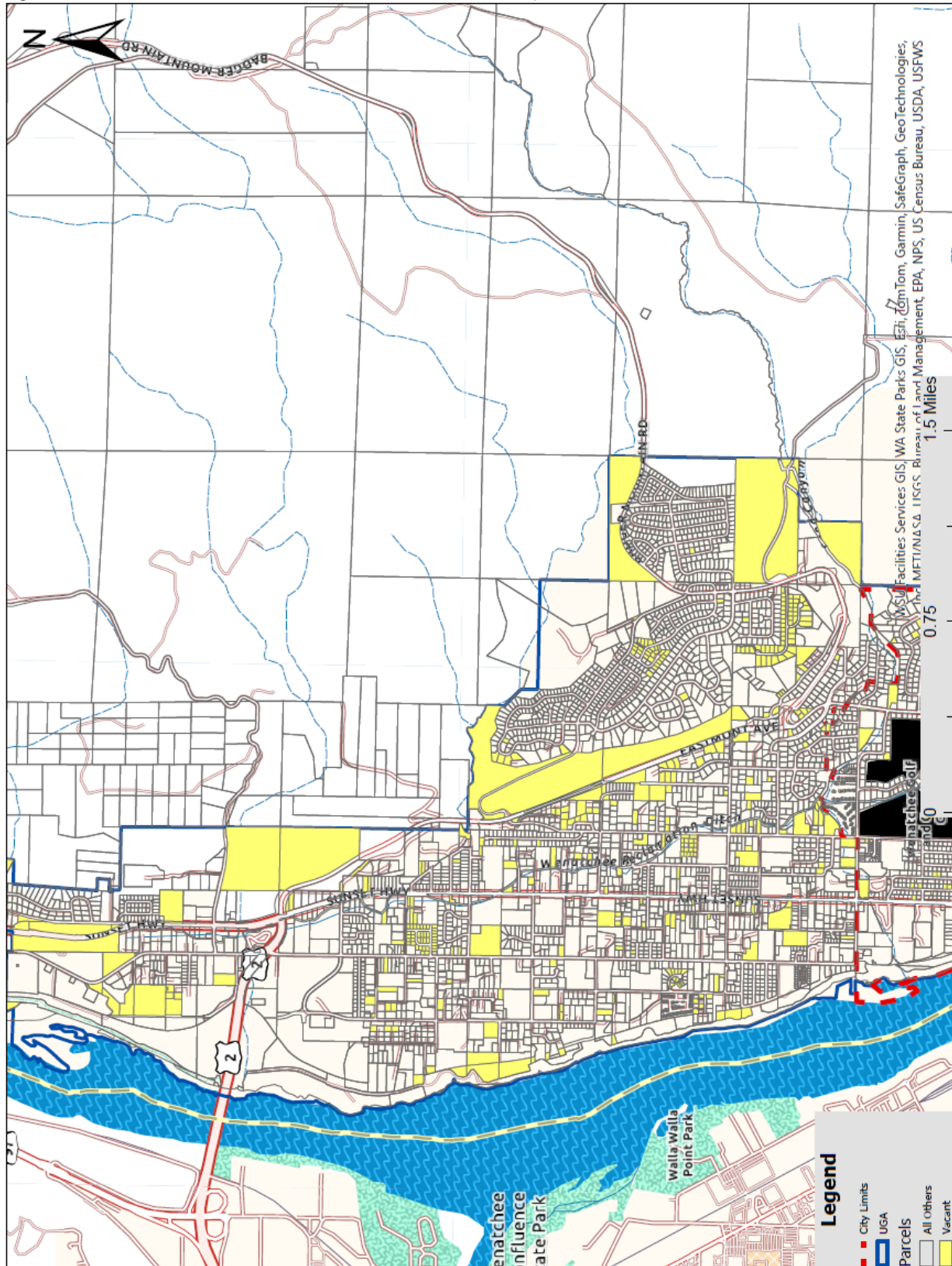
Source: Douglas County Land Services Department Data, 2024

Figure 1.2 East Wenatchee SE 2 Vacant Parcels Map



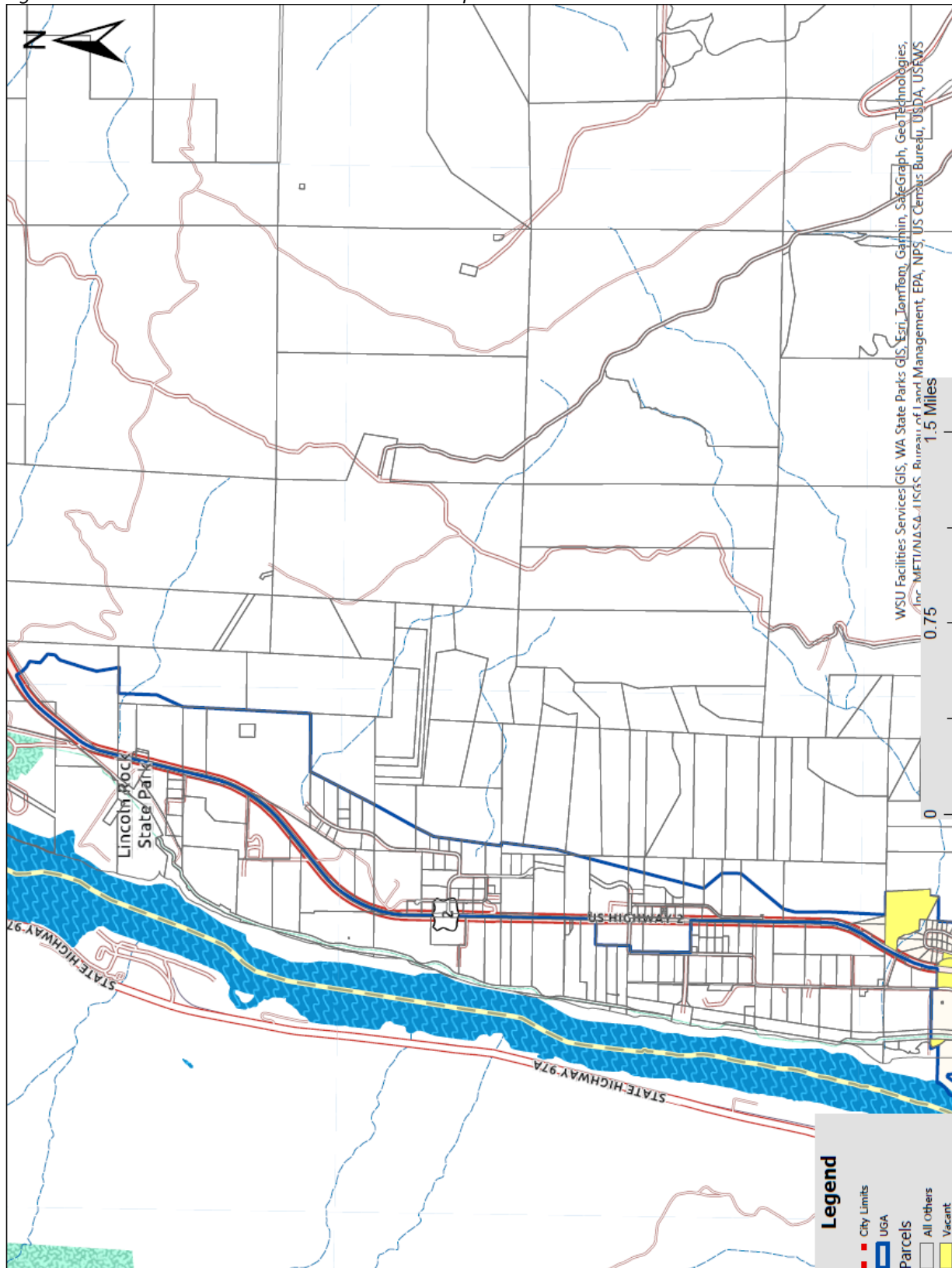
Source: Douglas County Land Services Department Data, 2024

Figure I.3 East Wenatchee North Central Vacant Parcels Map



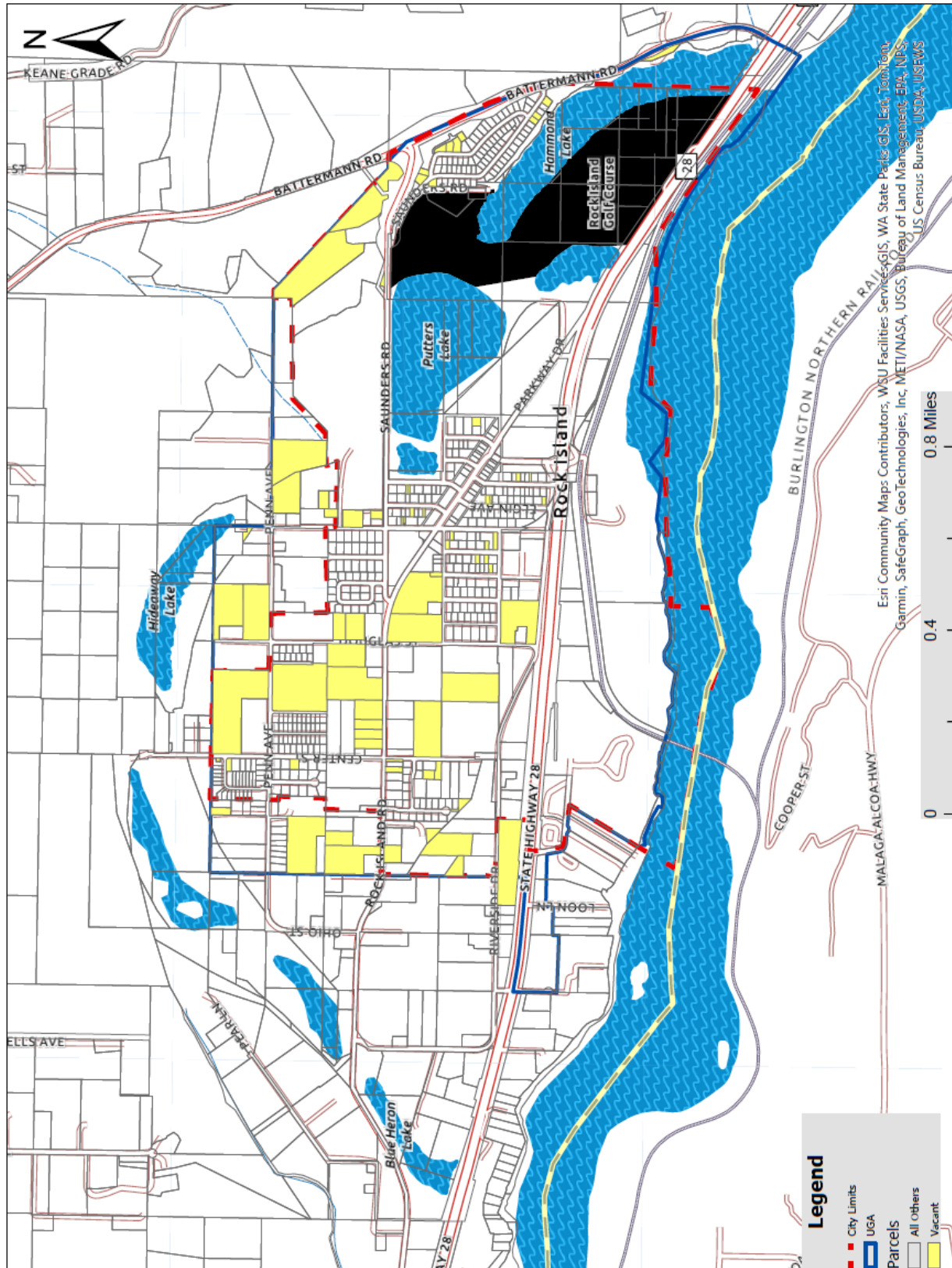
Source: Douglas County Land Services Department Data, 2024

Figure I.4 East Wenatchee North Vacant Parcels Map



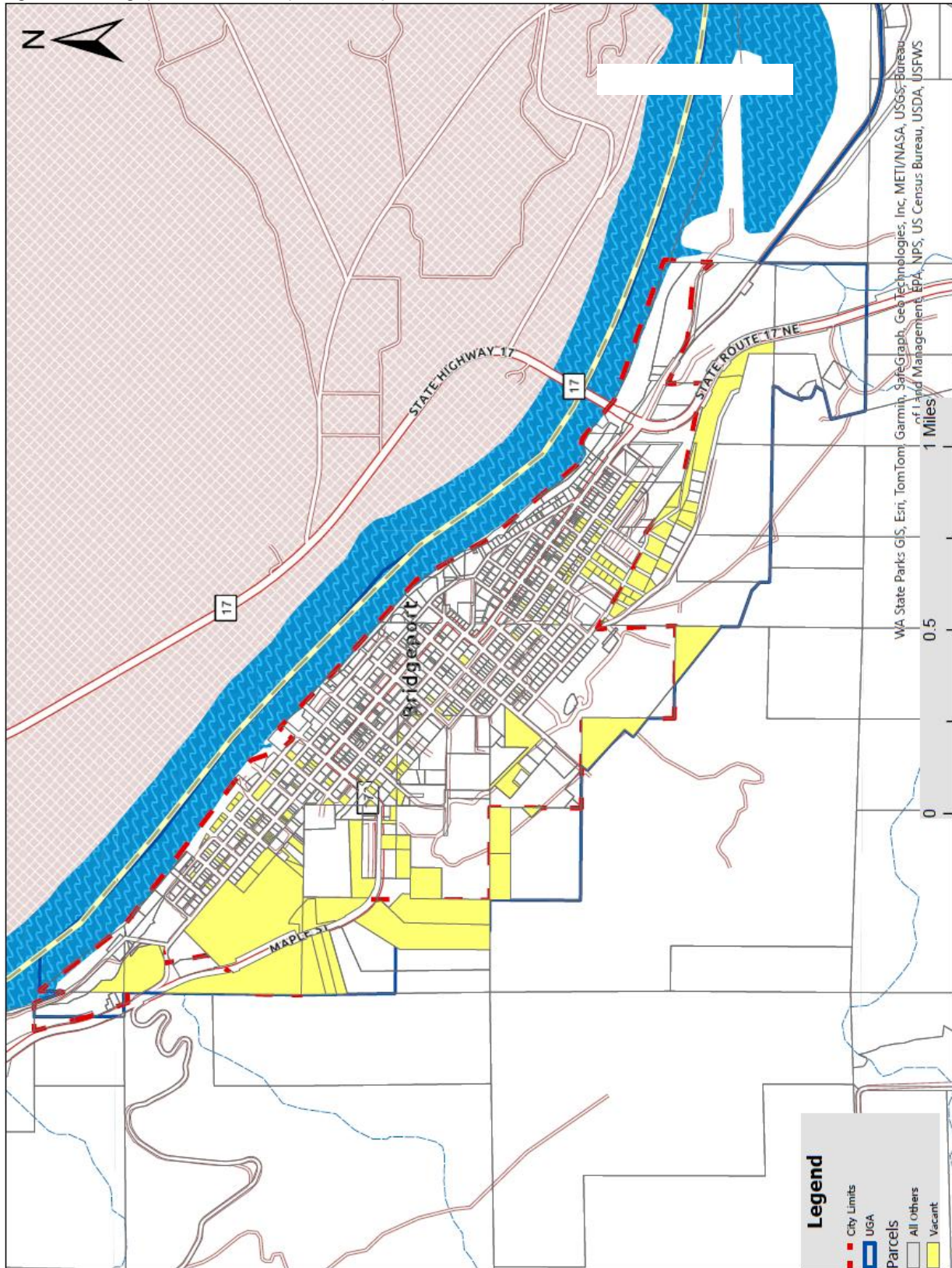
Source: Douglas County Land Services Department Data, 2024

Figure I.5 Rock Island Vacant Parcels Map



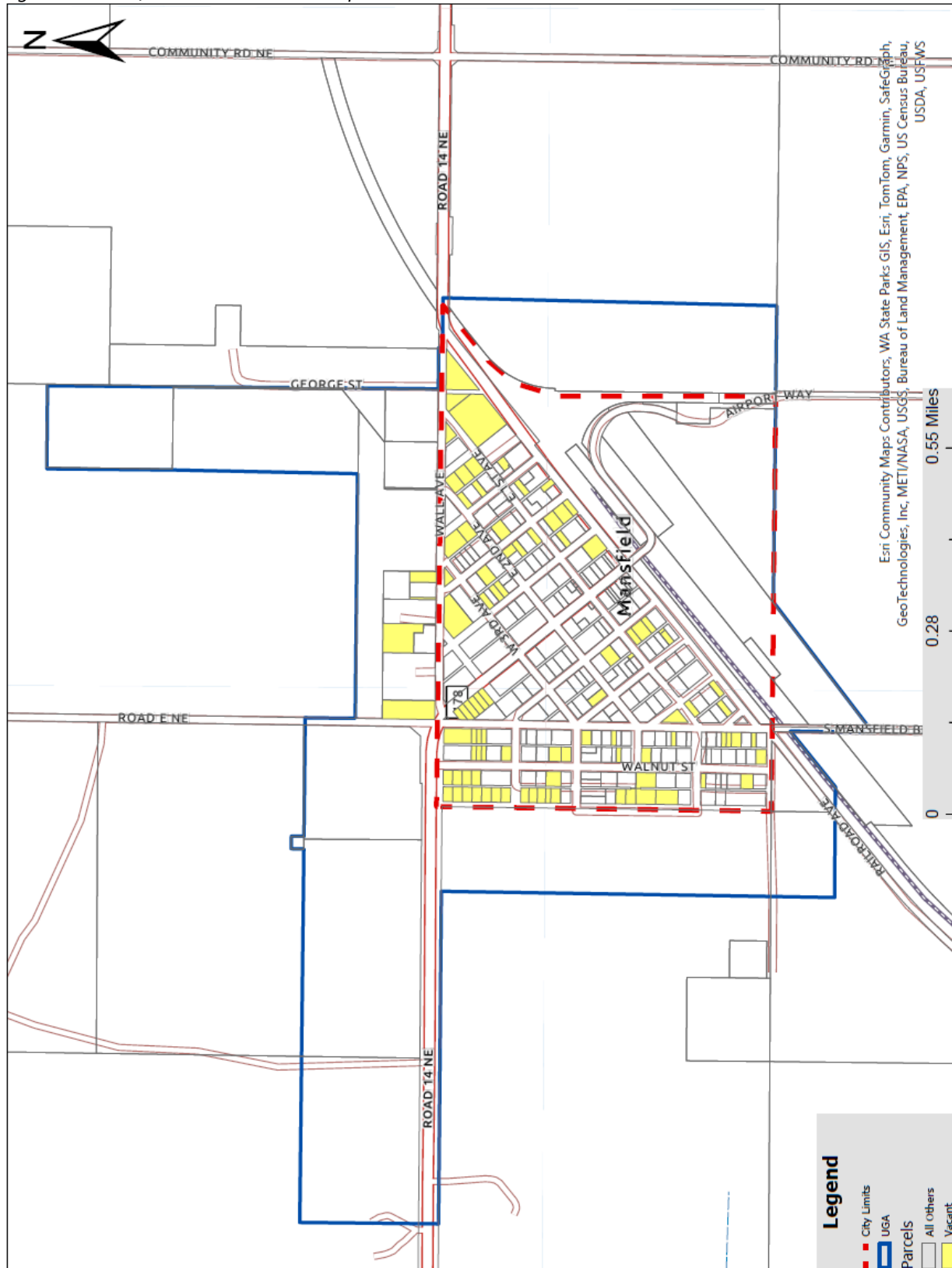
Source: Douglas County Land Services Department Data, 2024

Figure I.6 Bridgeport Vacant Properties Map



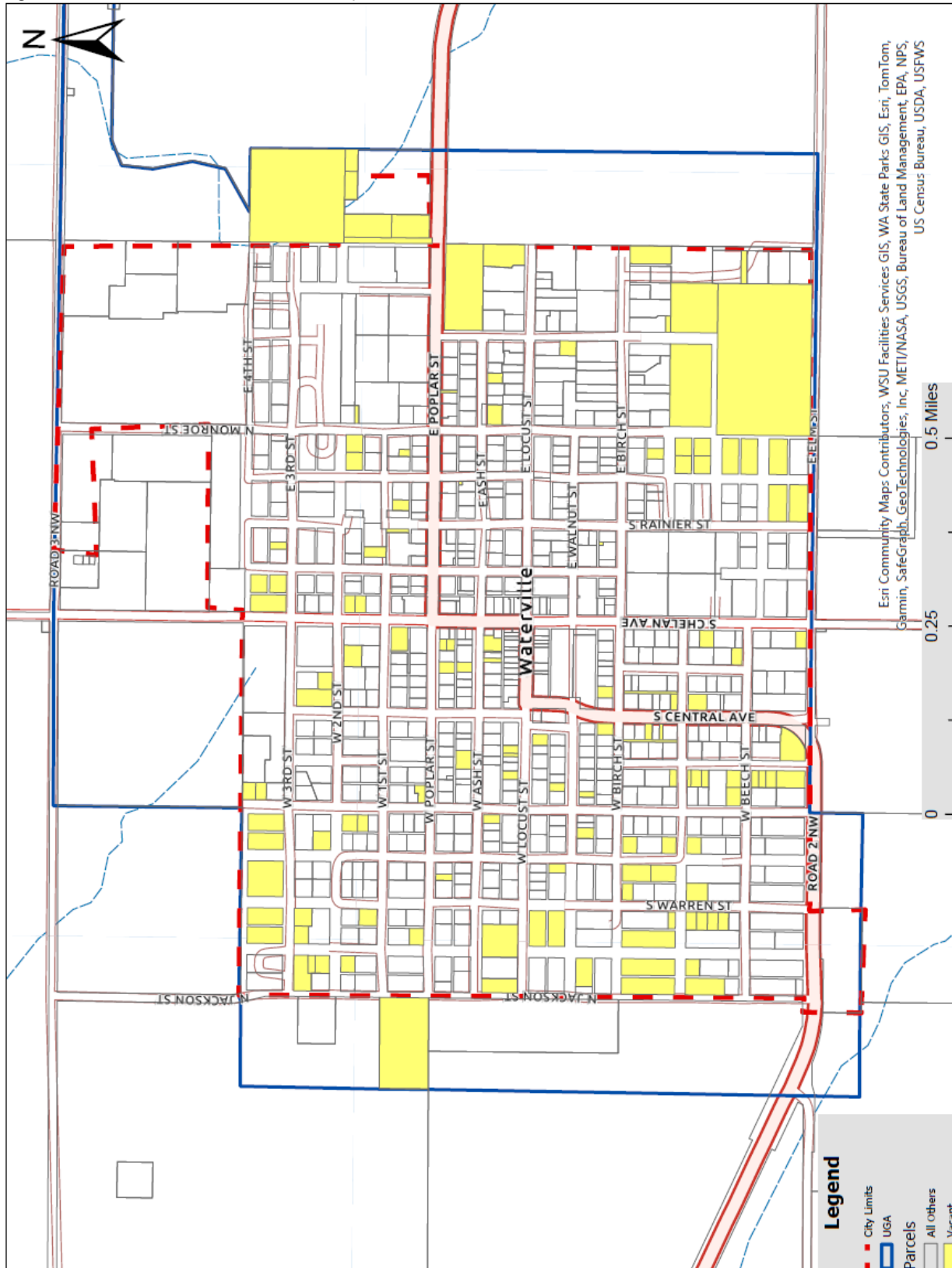
Source: Douglas County Land Services Data, 2024

Figure I.7 Mansfield Vacant Parcels Map



Source: Douglas County Land Services Department Data, 2024

Figure I.8 Waterville Vacant Parcels Map



Source: Douglas County Land Services Department Data, 2024

J. Appendix: Re-developable Land Inventory

Table J.1 Potentially Re-developable Parcels in East Wenatchee UGA

Zone	Number of Parcels	Adjusted Acres	Housing Unit Potential
R-L	350	192.8	682
R-M	26	12.0	128
R-H	27	15.0	106
MU	3	10.1	89
Total	406	230	1,006

Source: Douglas County Land Services Department Data, 2024; OFM Post Censal Permits – Completed SFH, 2024; OFM Post Censal Housing Units, 2025

Table J.2 Potentially Re-developable Parcels in Rock Island UGA

Zone	Number of Parcels	Adjusted Acres	Housing Unit Potential
R-L	42	23.1	66
M-R	4	2.0	12
Total	46	25.1	78

Source: Douglas County Land Services Department Data, 2024; OFM Post Censal Permits – Completed SFH, 2024; OFM Post Censal Housing Units, 2024

Table J.3 Potentially Re-developable Parcels in Bridgeport UGA

Zone	Number of Parcels	Adjusted Acres	Housing Unit Potential
R-1	4	42.2	165
R-2	1	0.2	2
R-3	2	9.1	134
Total	7	51.5	300

Source: Douglas County Land Services Department Data, 2024; OFM Post Censal Permits – Completed SFH, 2024; OFM Post Censal Housing Units, 2024

Table J.4 Potentially Re-developable Parcels in Waterville UGA

Zone	Number of Parcels	Adjusted Acres	Housing Unit Potential
R-1	17	2.4	9
R-2	0	0.0	0
Total	17	2.4	9

Source: Douglas County Land Services Department Data, 2024; OFM Post Censal Permits – Completed SFH, 2024; OFM Post Censal Housing Units, 2024

Table J.5 Potentially Re-developable Parcels in Mansfield UGA

Zone	Number of Parcels	Adjusted Acres	Housing Unit Potential
R1	3	0.6	3
R2	0	0.0	0
Total	3	0.6	3

Source: Douglas County Land Services Department Data, 2024; OFM Post Censal Permits – Completed SFH, 2024; OFM Post Censal Housing Units, 2024

K. Appendix: Underutilized Land Inventory

Table K.1 Underutilized Parcels in East Wenatchee UGA

Zone	Number of Parcels	Adjusted Acres	Housing Unit Potential
R-M	395	41.4	440
R-H	244	27.6	196
MU	5	2.6	23
Total	644	71.6	659

Source: Douglas County Land Services Department Data, 2024; OFM Post Censal Permits – Completed SFH, 2024; OFM Post Censal Housing Units, 2024

Table K.2 Underutilized Parcels in Bridgeport UGA

Zone	Number of Parcels	Adjusted Acres	Housing Unit Potential
R-2	67	4.0	39
R-3	90	10.2	149
Total	157	14.2	188

Source: Douglas County Land Services Department Data, 2024; OFM Post Censal Permits – Completed SFH, 2024; OFM Post Censal Housing Units, 2024

Table K.3 Underutilized Parcels in Rock Island UGA

Zone	Number of Parcels	Adjusted Acres	Housing Unit Potential
M-R	72	3.6	21

Source: Douglas County Land Services Department Data, 2024; OFM Post Censal Permits – Completed SFH, 2024; OFM Post Censal Housing Units, 2024

Table K.4 Underutilized Parcels in Waterville UGA

Zone	Number of Parcels	Adjusted Acres	Housing Unit Potential
R-2	101	10.9	106

Source: Douglas County Land Services Department Data, 2024; OFM Post Censal Permits – Completed SFH, 2024; OFM Post Censal Housing Units, 2024

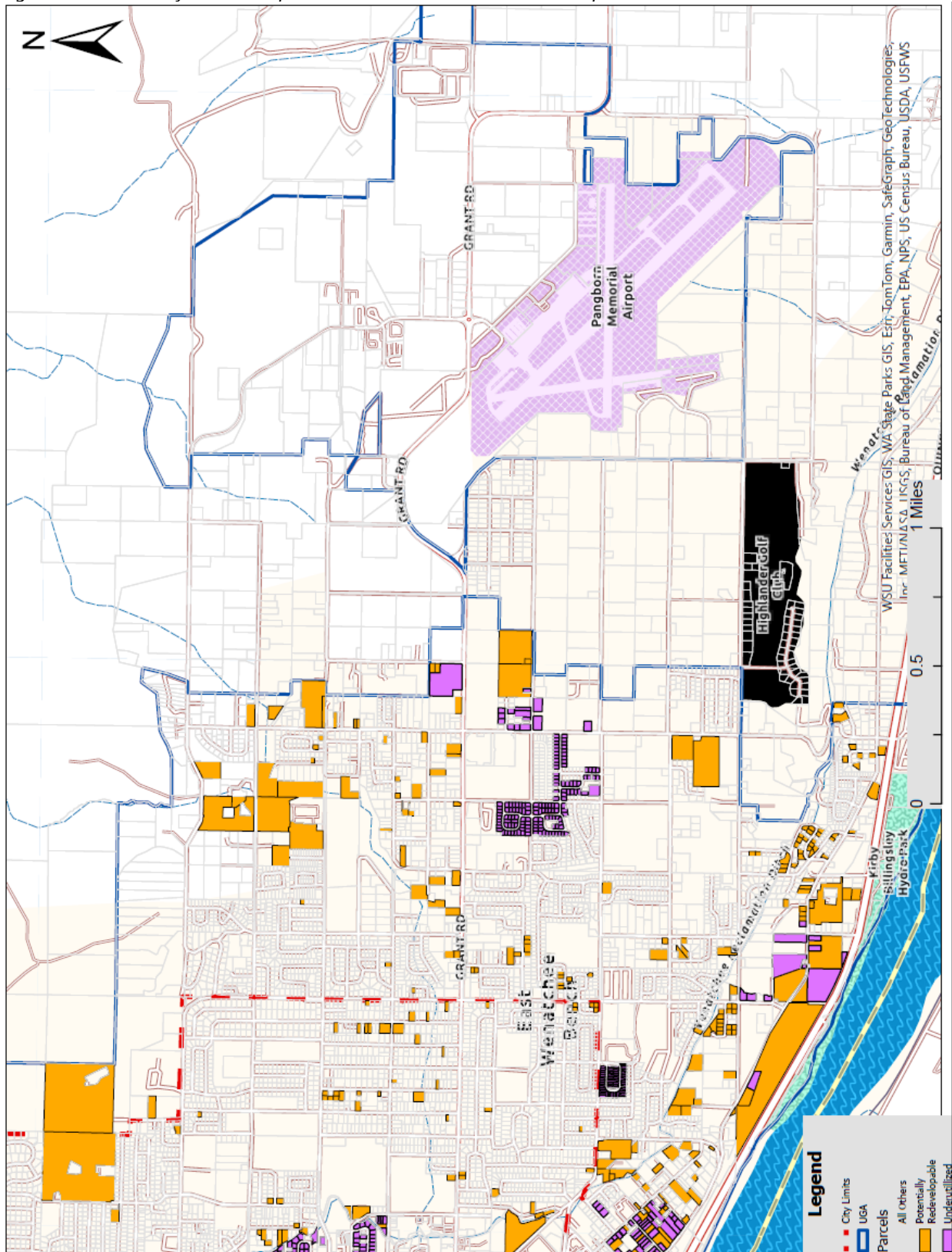
Table K.5 Underutilized Parcels in Mansfield UGA

Zone	Number of Parcels	Adjusted Acres	Housing Unit Potential
R2	5	2.3	22

Source: Douglas County Land Services Department Data, 2024; OFM Post Censal Permits – Completed SFH, 2024; OFM Post Censal Housing Units, 2024

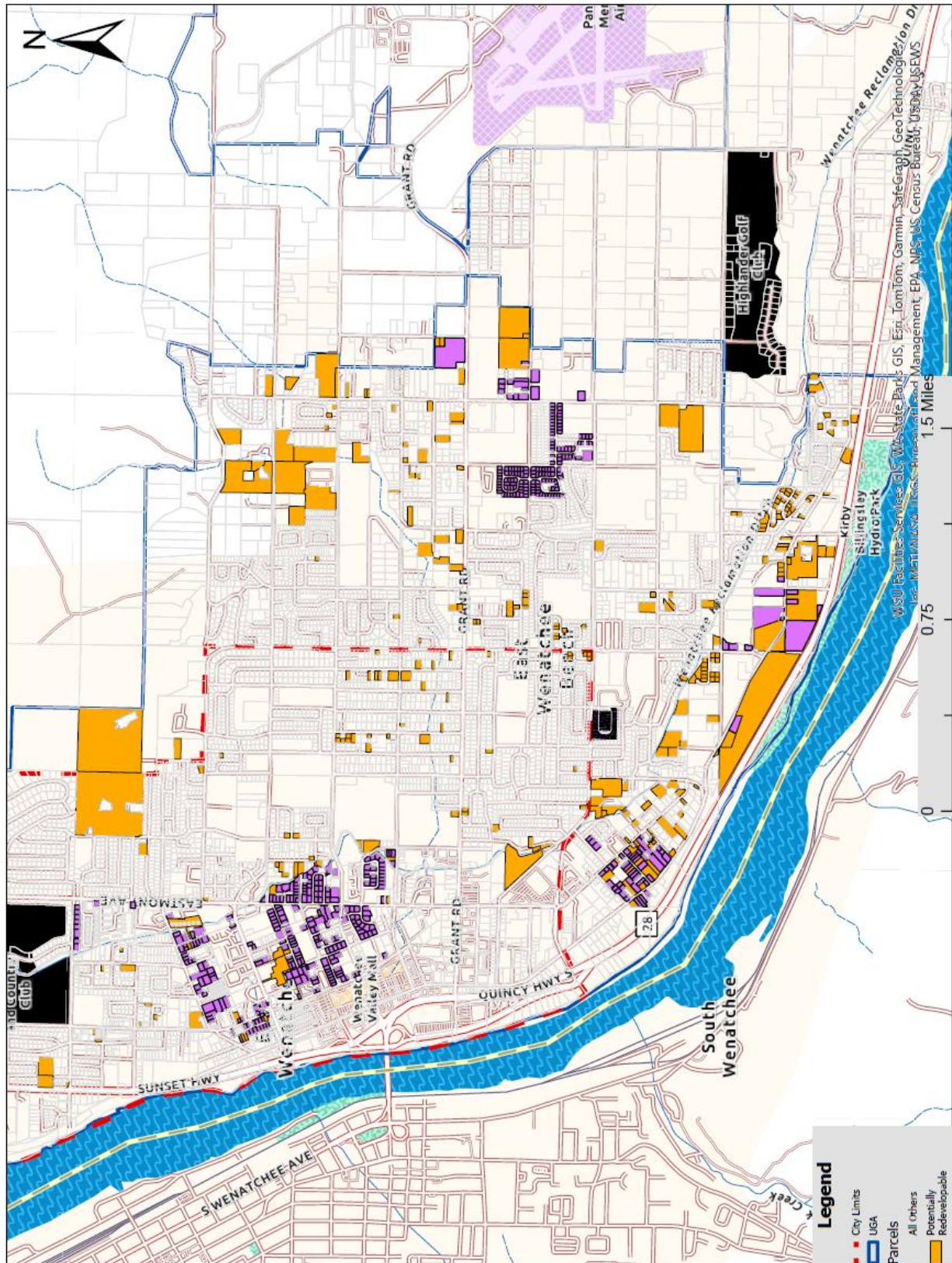
L. Appendix: Potentially Re-developable and Underutilized Land Inventory Maps

Figure L.1 Potentially Re-developable and Underutilized Parcels Map - East Wenatchee SE



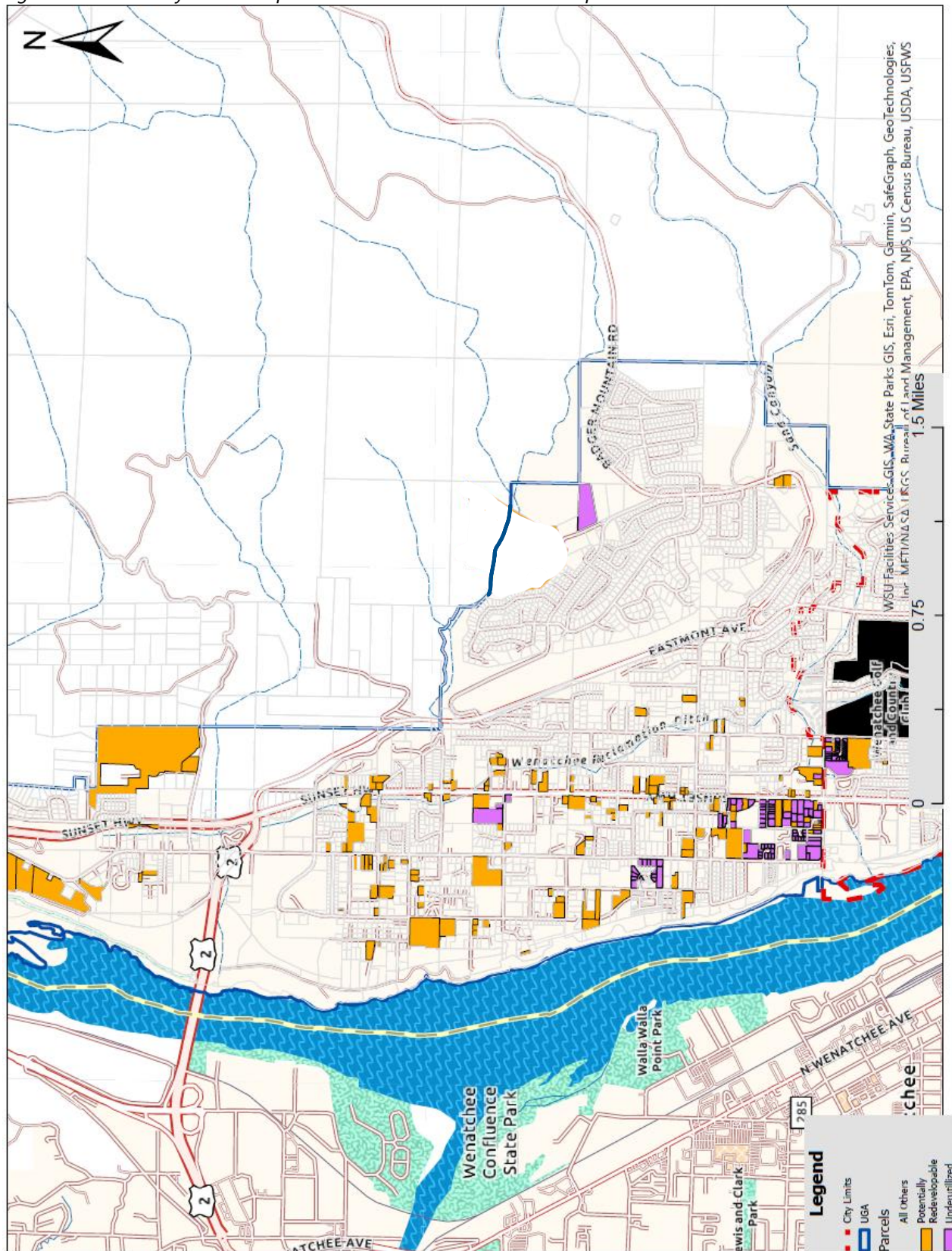
Source: Douglas County Land Services Department Data, 2024

Figure L.2 Potentially Re-developable and Underutilized Parcels Map - East Wenatchee Central



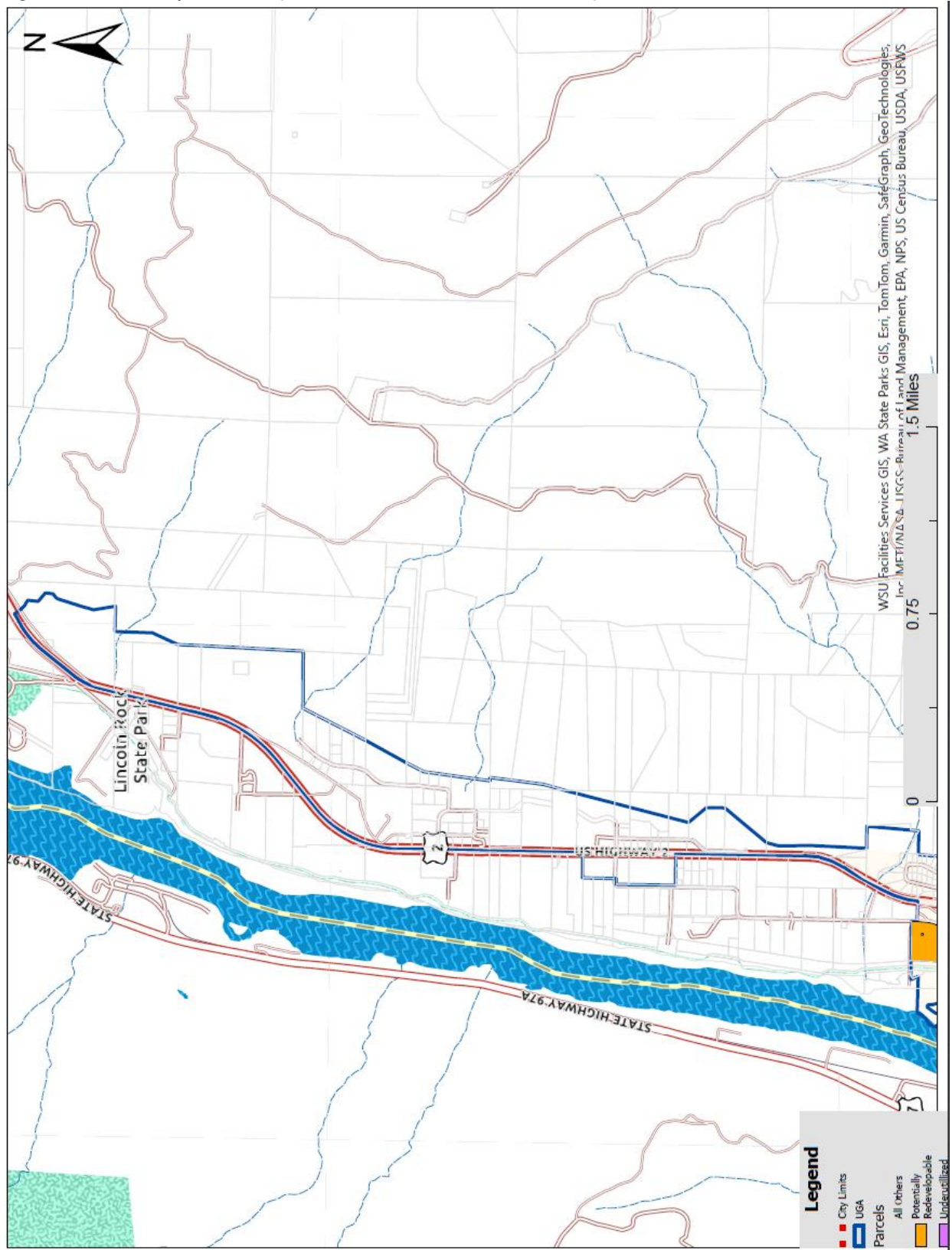
Source: Douglas County Land Services Department Data, 2024

Figure L.3 Potentially Re-developable and Underutilized Parcels Map - East Wenatchee Central North



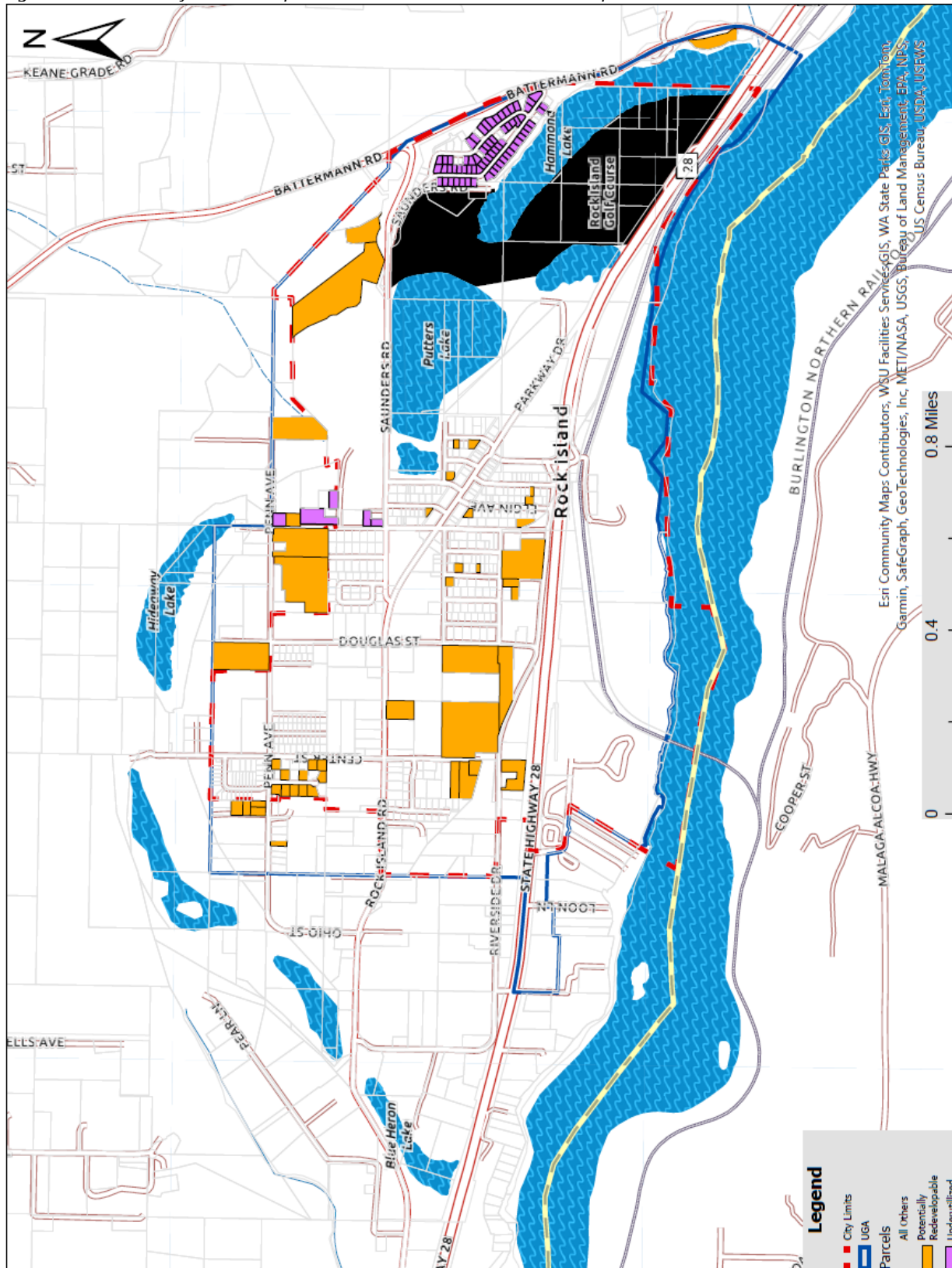
Source: Douglas County Land Services Department Data, 2024

Figure L.4 Potentially Re-developable and Underutilized Parcels Map - East Wenatchee North



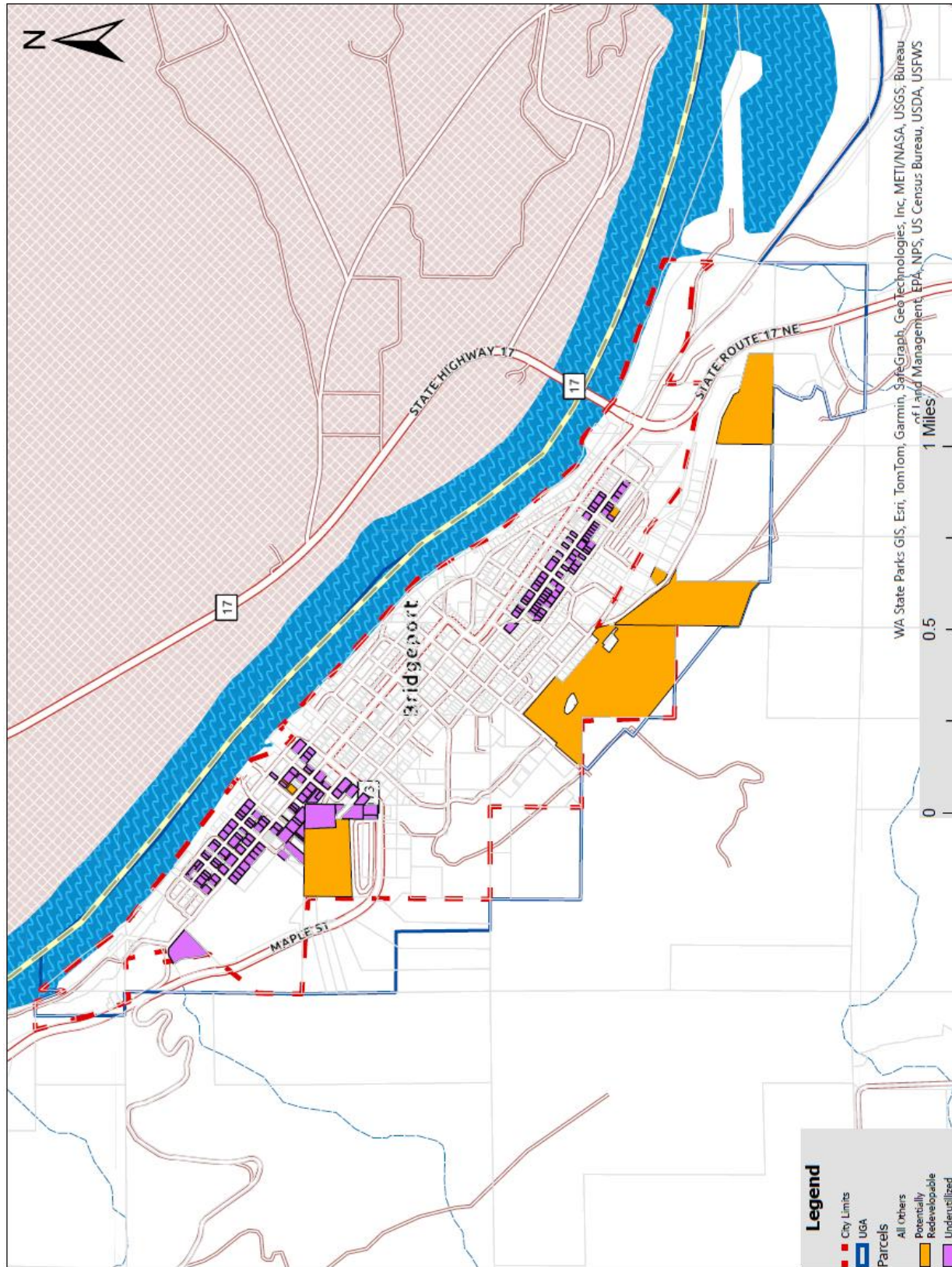
Source: Douglas County Land Services Department Data, 2024

Figure L.5 Potentially Re-developable and Underutilized Parcels Map - Rock Island



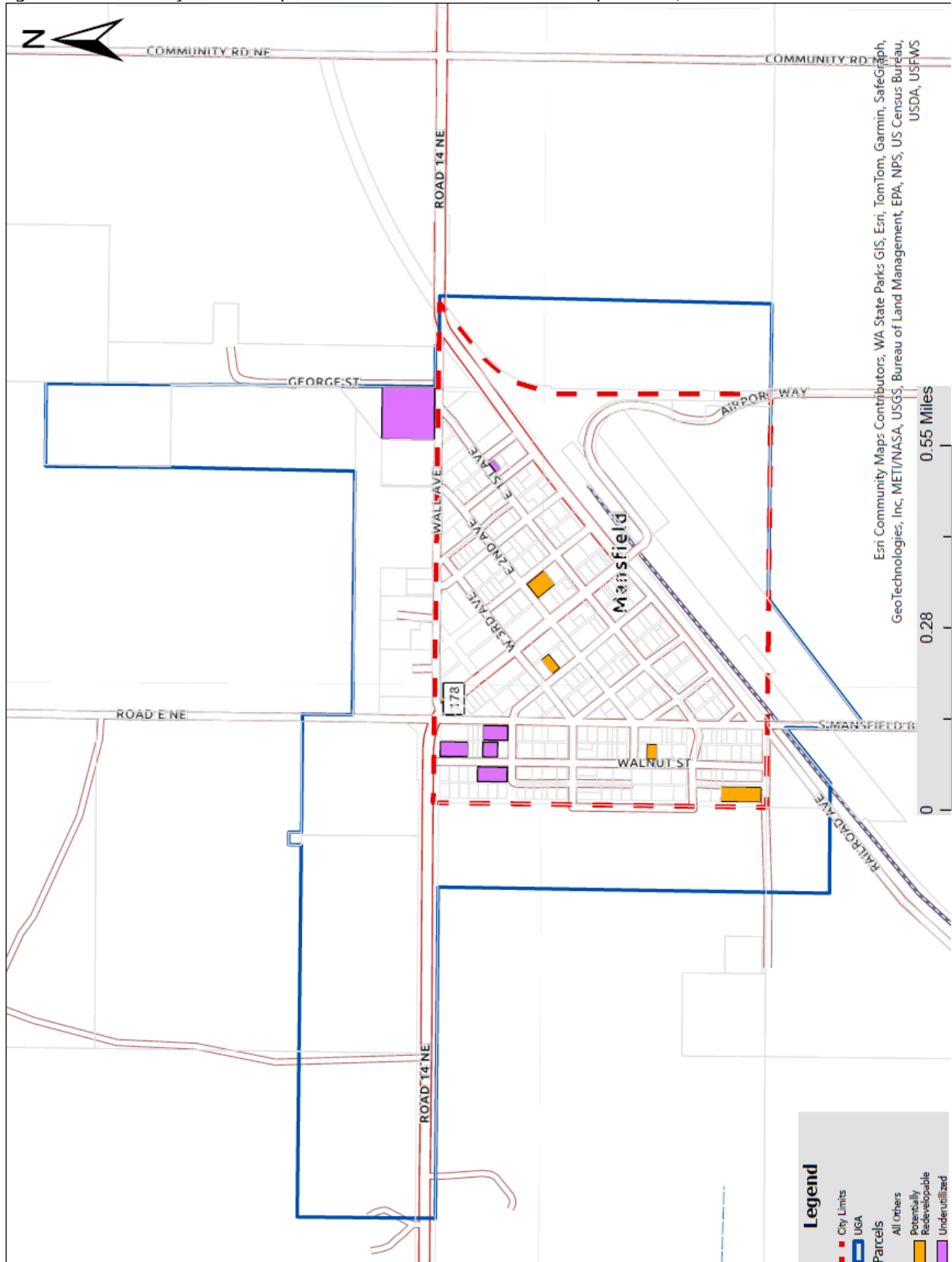
Source: Douglas County Land Services Department Data, 2024

Figure L.6 Potentially Re-developable and Underutilized Parcels Map - Bridgeport



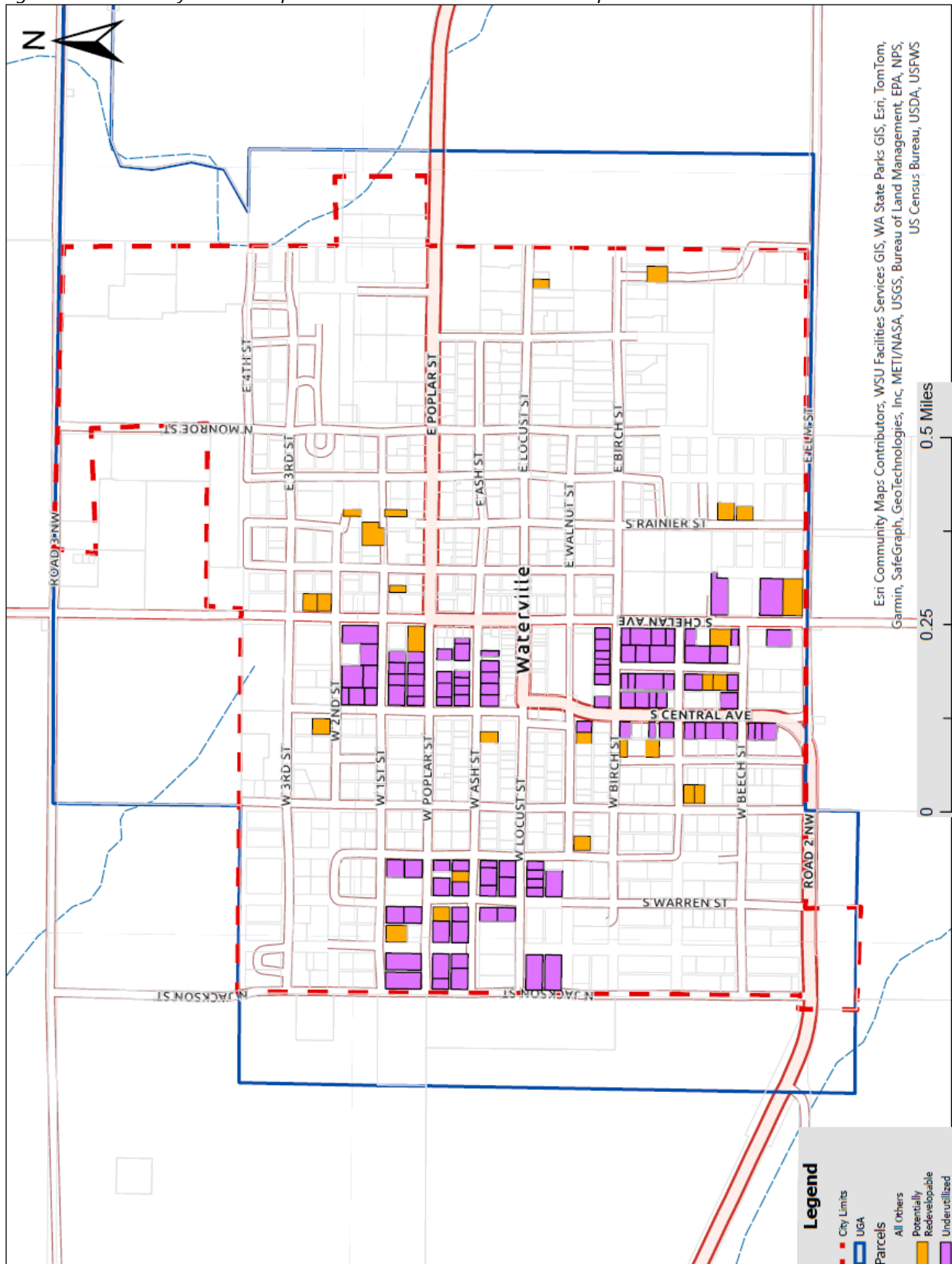
Source: Douglas County Land Services Department Data, 2024

Figure L.7 Potentially Re-developable and Underutilized Parcels Map - Mansfield



Source: Douglas County Land Services Data, 2024

Figure L.8 Potentially Re-developable and Underutilized Parcels Map - Waterville



Source: Douglas County Land Services Department, 2024

M. Appendix: Potential Racially Disparate Impacts

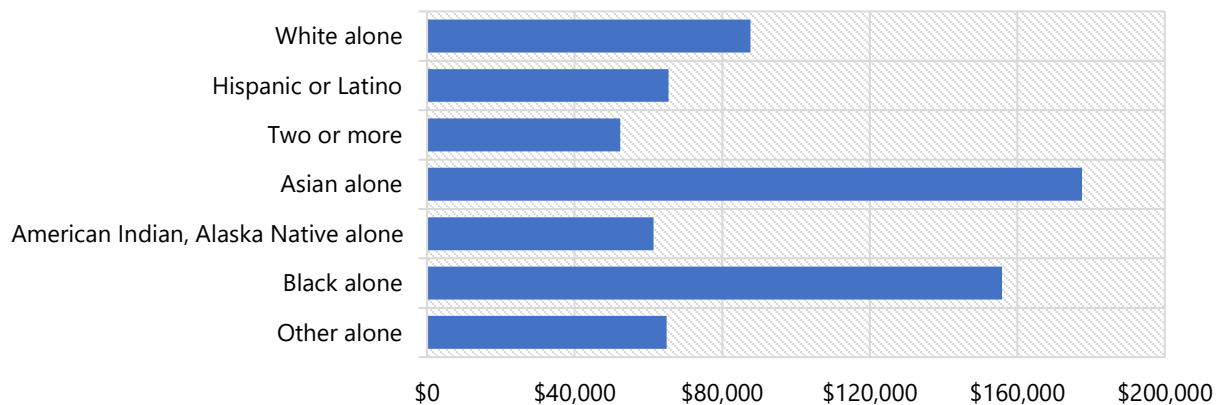
This appendix addresses the adverse impacts on different racial demographics. Several potential components of racially disparate impacts include:

- Homeownership
- Housing accessibility
- Cost burden
- Environmental hazard exposure
- Overcrowding
- Fair housing Violations
- Over and under representation of groups

More broadly, historical demographic and income trends will impact housing needs by income level in Douglas County. To measure some of these potential impacts, PC has gathered current levels of median household income and housing tenure by race in the County.

Figure M.1 displays median household income by race in Douglas County for 2022. Groups with lower household incomes will be more affected by housing prices, increasing their cost burden compared to those with higher household incomes. The two outliers in this data are individuals identifying as Black alone and American Indian/Alaska Native alone. Each group has a median household income of over \$150K, but further analysis shows that these are the two smallest household groups in Douglas County, making up only about 140 households in total. Outside of these groups, individuals identifying as White alone have the highest household income at \$87.7K. All other groups have household incomes more than \$20K lower than White alone households. Housing accessibility and cost burden may be significant issues for these groups in Douglas County.

Figure M.1 Median Household Income by Race in Douglas County, 2022

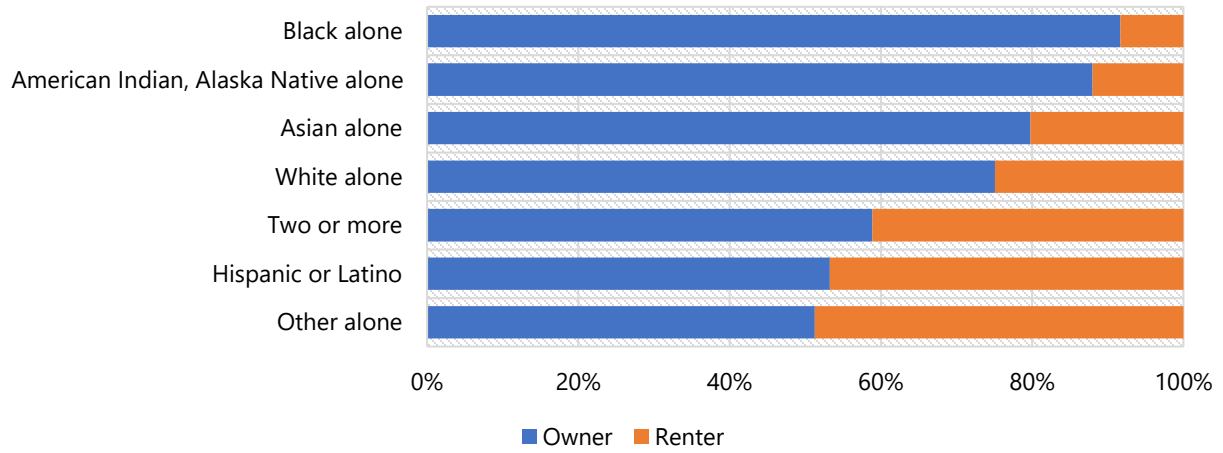


Source: US Census Bureau, American Community Survey, Table B19013, 2022 5-Year Estimates

Note: This graph is displayed in the order of the population size of the demographic group.

Housing tenure, which indicates whether a household is renting or owning, is shown in Figure E.2. This measure is broken down by race in the county at current 2022 levels. Individuals identifying as Hispanic or Latino, Two or More Races, or Some Other Race each have the lowest homeownership rates, all below 60%. These groups may have diverse housing needs that are not accounted for by solely focusing on new single-family homes for high-income earners.

Figure M.2 Housing Tenure by Race in Douglas County, 2022



Source: US Census Bureau, American Community Survey, Table B25003, 2022 5-Year Estimates

N. Appendix: New Single-Family Homes Adjustment for Potentially Re-Developable and Underutilized Housing Unit Potential

For the market factors impacting the housing unit potential from potentially re-developable and underutilized properties, the Douglas County Regional Council requested a community-specific approach. This appendix details PC's work in accomplishing that request.

In addition to the market factors published in [Section 4](#) and [Section 5](#), we made a gross reduction according to the number of new single-family units that have been completed throughout the last five years. These properties would be the least likely to redevelop under any circumstances because they are the newest builds. Because they are least likely to redevelop in the next 20 years, they should be excluded from the total housing capacity findings. To do this, we estimated the share that single-family homes completed from 2020 through 2024 of the total 2024 housing stock in each jurisdiction. This share was used as a reduction factor for potentially re-developable and underutilized housing unit potential in final housing capacity calculations. The following steps outline the full process.

Table N.1 Step 1 - Pull single-family completions from OFM

City Name	Estimate Year	Completed Single Family units
Bridgeport	2020-2024	17
Coulee Dam	2020-2024	0
East Wenatchee	2020-2024	17
Mansfield	2020-2024	4
Rock Island	2020-2024	160
Unincorporated	2020-2024	933
Waterville	2020-2024	12

Source: OFM April 1, 2024, Post Censal Permits, 1990-Present

Table N.2 Step 2 - Determine unincorporated housing unit redistribution percentages according to HAPT

Region	2020 Housing Units	Percent of Total Unincorporated
Bridgeport Zone B ⁵	10	0.1%
Coulee Dam Zone B	0	0.0%
East Wenatchee Zone B	5,778	66.2%
Mansfield Zone B	6	0.1%
Rock Island Zone B	48	0.5%
Waterville Zone B	2	0.0%
Rural Unincorporated Douglas County	2,885	33.1%
Total Unincorporated Douglas County	8,729	100.0%

Source: Housing for All Planning Tool, 2024

⁵ Zone B refers to the unincorporated UGA of the region, see [here](#).

Table N.3 Step 3 - Redistribute completions from "Unincorporated" according to 2020 unincorporated UGA values from HAPT

Region	Percent of Total Unincorporated	Total Unincorporated Douglas County SFH Completions Redistributed	Total UGA SFH Completions
Bridgeport UGA	0.1%	1	18
Coulee Dam UGA	0.0%	0	0
East Wenatchee UGA	66.2%	618	635
Mansfield UGA	0.1%	1	5
Rock Island UGA	0.5%	5	165
Waterville UGA	0.0%	0	12
Rural Douglas County	33.1%	308	308
Unincorporated Douglas County	100.0%	933	1,143

Source: OFM April 1, 2024, Post Censal Permits, 1990-Present; Housing for All Planning Tool, 2024

Table N.4 Step 4 - Determine share of new single-family completions of total 2024 housing units

Region	Total UGA SFH Completions	Divide by Total 2024 Housing Units	Re-developable Unit Adjustment Factor
Bridgeport UGA	18	729	2.5%
Coulee Dam UGA	0	96	0.0%
East Wenatchee UGA	635	5,527	11.5%
Mansfield UGA	5	169	2.7%
Rock Island UGA	165	591	27.9%
Waterville UGA	12	486	2.5%

Source: OFM April 1, 2024, Post Censal Permits, 1990-Present; Housing for All Planning Tool, 2024; OFM April 1, 2024, Post Censal Housing Estimates, 1980, 1990-Present

O. Appendix: Potentially Re-Developable and Underutilized Market Factor Sensitivity Analysis

Table O.1 Total Housing Units for Potentially Re-developable and Underutilized Parcels, with Market Factor Sensitivity Analysis

Region	Published Market Factors	+10 Percentage Points	-10 Percentage Points
East Wenatchee UGA	1,665	1,293	1,835
Rock Island UGA	99	82	116
Bridgeport UGA	489	405	573
Mansfield UGA	25	20	30
Waterville UGA	115	93	138

Source: Douglas County Land Services Department Data, 2024; OFM Post Censal Permits – Completed SFH, 2024; OFM Post Censal Housing Units, 2024

Table O.2 Potentially Re-developable Housing Unit Potential at 45% Market Factor

Zone	Number of Parcels	Adjusted Acres	Density Assumption	Housing Unit Potential
Bridgeport UGA				
R-1	4	35.7	4	143
R-2	1	0.1	10	1
R-3	2	7.7	15	116
Total	7	43.6		260
East Wenatchee UGA				
R-L	350	139.0	4	556
R-M	26	10.2	12	122
R-H	27	12.7	8	101
MU	3	8.6	10	86
Total	406	170		865
Mansfield UGA				
R1	3	0.5	4	2
Rock Island UGA				
R-L	42	19.5	4	78
M-R	4	1.7	8	14
Total	46	21.2		92
Waterville UGA				
R-1	17	2.0	4	8

Source: Douglas County Land Services Department Data, 2024; OFM Post Censal Permits – Completed SFH, 2024; OFM Post Censal Housing Units, 2024

Table O.3 Potentially Re-developable Housing Unit Potential at 25% Market Factor

Zone	Number of Parcels	Adjusted Acres	Density Assumption	Housing Unit Potential
Bridgeport UGA				
R-1	4	48.7	4	195
R-2	1	0.2	10	2
R-3	2	10.6	15	158
Total	7	59.4		355
East Wenatchee UGA				
R-L	350	189.6	4	758
R-M	26	13.9	12	167
R-H	27	17.3	8	138
MU	3	11.7	10	117
Total	406	232		1,180
Mansfield UGA				
R1	3	0.7	4	3
Rock Island UGA				
R-L	42	26.6	4	107
M-R	4	2.3	8	18
Total	46	28.9		125
Waterville UGA				
R-1	17	2.7	4	11

Source: Douglas County Land Services Department Data, 2024; OFM Post Censal Permits – Completed SFH, 2024; OFM Post Censal Housing Units, 2024

Table O.4 Underutilized Housing Unit Potential at 60% Market Factor (70% for Rock Island)

Zone	Number of Parcels	Adjusted Acres	Density Assumption	Housing Unit Potential
Bridgeport UGA				
R-2	67	3.2	10	32
R-3	90	8.2	15	123
Total	157	11.4		155
East Wenatchee UGA				
R-M	395	33.1	12	398
R-H	244	22.1	8	177
MU	5	2.1	10	21
Total	644	57.3		596
Mansfield UGA				
R2	5	1.9	10	19
Rock Island UGA				
M-R	72	2.7	8	22
Waterville UGA				
R-2	101	8.7	10	87

Source: Douglas County Land Services Department Data, 2024; OFM Post Censal Permits – Completed SFH, 2024; OFM Post Censal Housing Units, 2024

Table O.5 Underutilized Housing Unit Potential at 40% Market Factor (50% for Rock Island)

Zone	Number of Parcels	Adjusted Acres	Density Assumption	Housing Unit Potential
Bridgeport UGA				
R-2	67	4.8	10	48
R-3	90	12.3	15	184
Total	157	17.1		232
East Wenatchee UGA				
R-M	395	49.7	12	597
R-H	244	33.2	8	265
MU	5	3.1	10	31
Total	644	86.0		893
Mansfield UGA				
R2	5	2.8	10	28
Rock Island UGA				

M-R	72	4.5	8	36
Waterville UGA				
R-2	101	13.1	10	131

Source: Douglas County Land Services Department Data, 2024; OFM Post Censal Permits – Completed SFH, 2024; OFM Post Censal Housing Units, 2024