

# Sweet Home Housing Needs Analysis



September 15, 2022, 6:30pm

**3J CONSULTING**  
CIVIL ENGINEERING | WATER RESOURCES | COMMUNITY PLANNING

 **FCS GROUP**  
Solutions-Oriented Consulting



# Agenda

- **Welcome**
- **Project overview**
- **Buildable Land Inventory**
- **Reconciliation of Residential Supply and Demand**
- **Next steps**



# Housing Needs Analysis Overview

OAR 660, ORS 197.296 and divisions 7, 8 & 24 provide a framework for Comp. Plan amendments related to Housing Needs Analysis (HNA):

- Housing needs projection
- Buildable land inventory (BLI)
- Residential land needs analysis
- Policy measures for accommodating needed housing



*HB 4006 puts new emphasis on addressing severe rent burdens\**

*\* When households spend over 50% of income on gross rent*

# Project Overview

Sweet Home HNA Project Schedule	2022										
	March	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	
Housing Needs Projection			■								
Buildable Land Inventory							■ ★				
Residential Land Need Analysis								■ ★			
Measures to Accommodate Needed Housing Adoption (HNA)									◆		◆

PAC Meetings ■

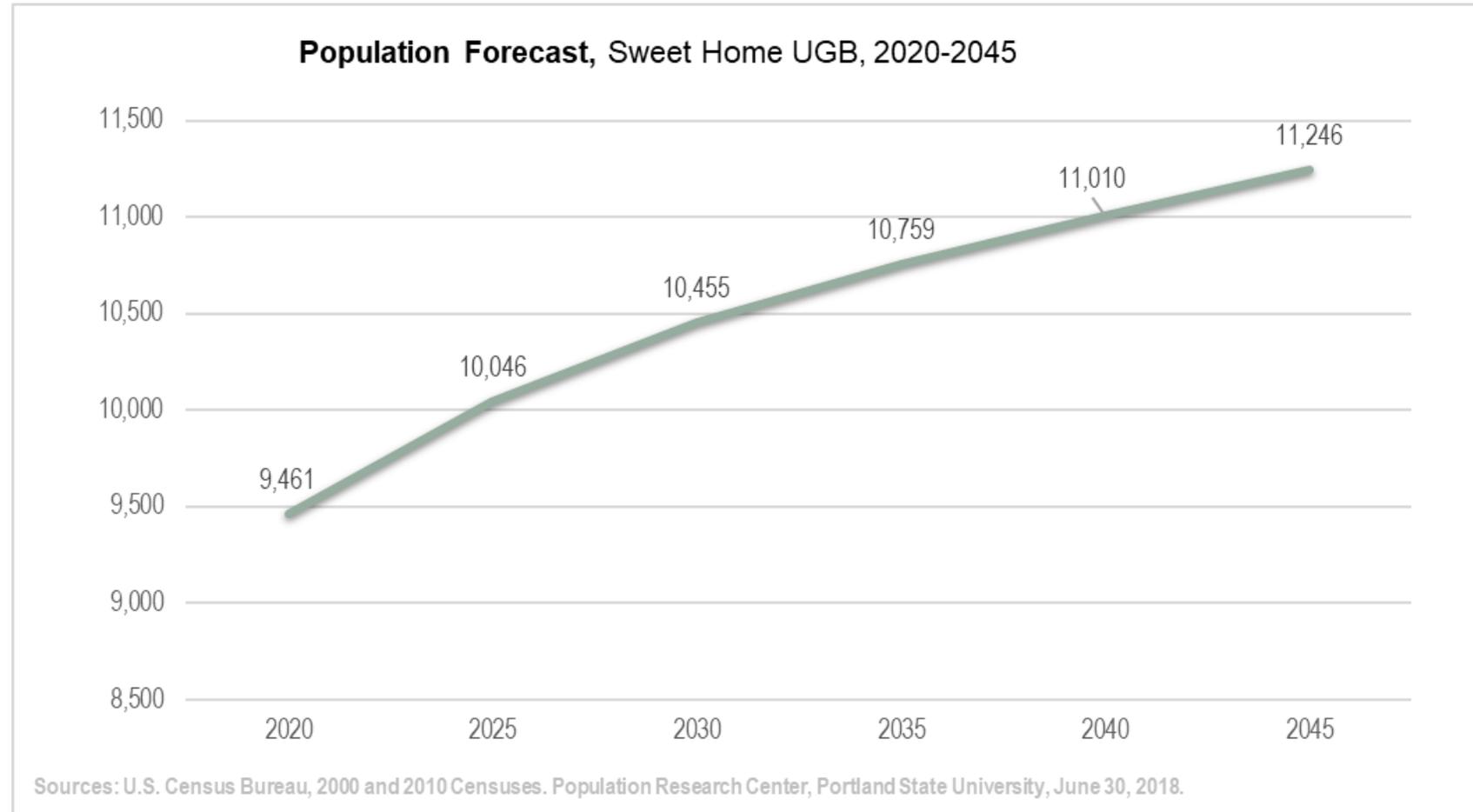
Planning Commission/City Council Meetings ◆

Public Workshops ★

# Housing Needs Projection

# Population Growth Forecast

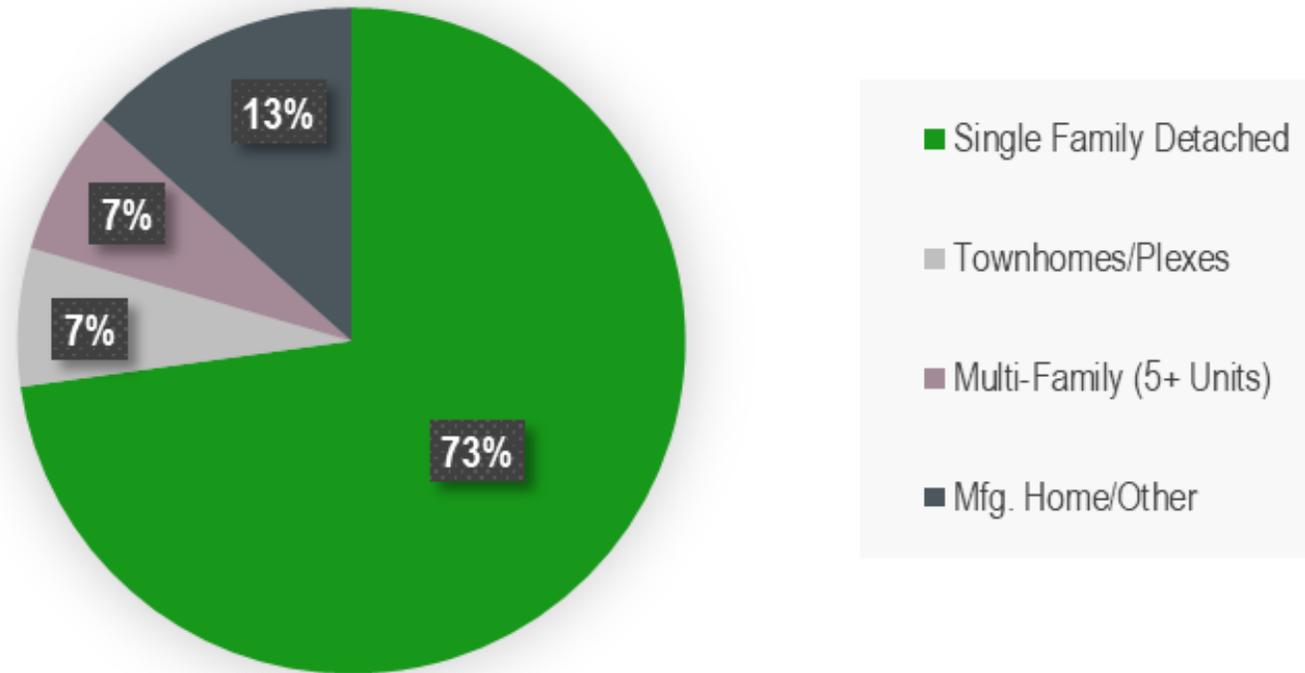
- **Sweet Home UGB is projected to add +/- 1,573 people over next 20 years**
- **Household growth tends to exceed population growth as the average household size shrinks**



# Housing Inventory

- **4,107 total housing units in Sweet Home** (city limits in year 2020)
- **73% of housing is single family detached**
- **14% “middle housing”** (townhomes, plexes and apartments)
- **Vacancy was 5% in 2020**

Housing Units by Housing Type, City of Sweet Home, 2020

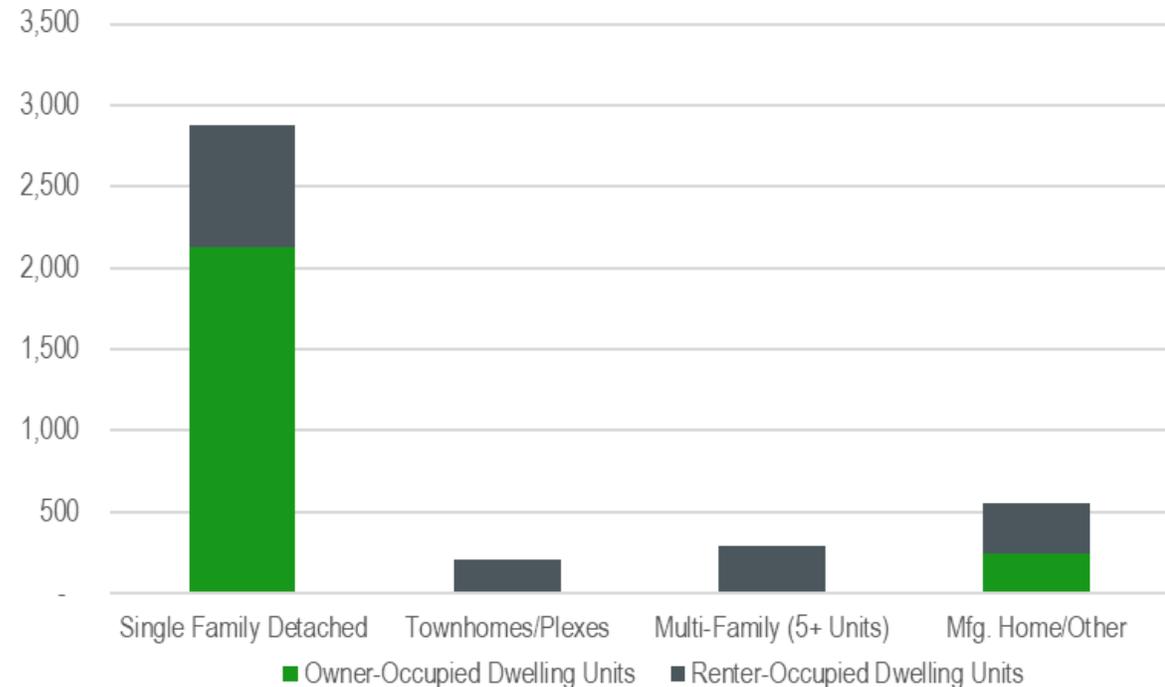


Source: U.S. Census Bureau, American Community Survey 5-Year Estimates (Table DP04)

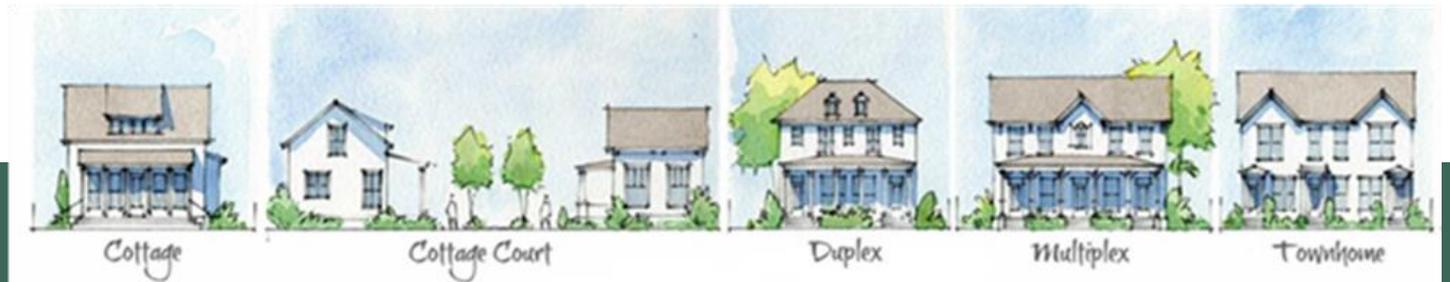
# Tenure by Structure

- 70% of single-family detached home units are owner-occupied
- 100% of multifamily and townhomes are renter-occupied
- 45% of mobile homes are owner-occupied

Housing Tenure by Housing Type, City of Sweet Home, 2020

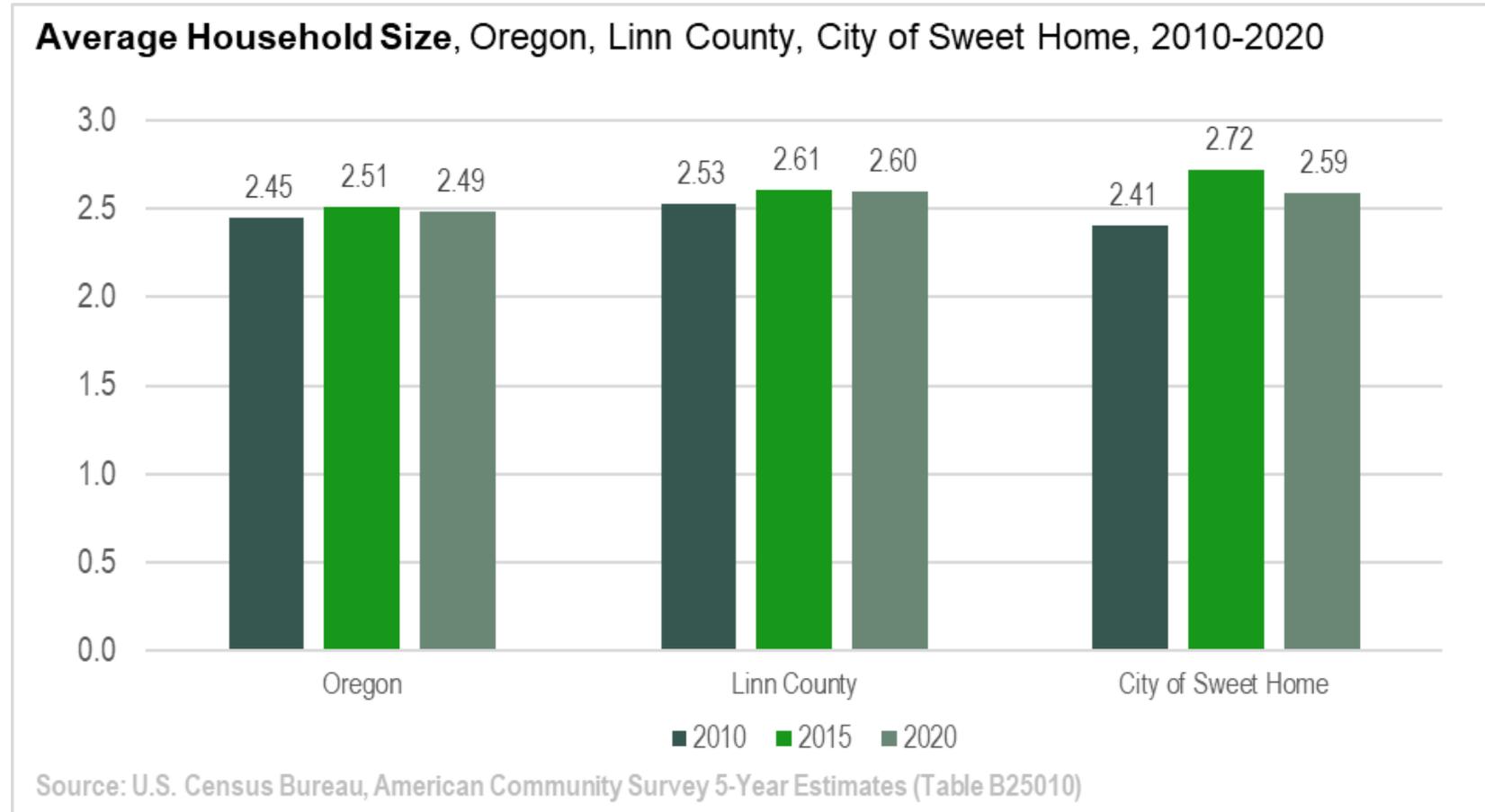


Source: U.S. Census Bureau, American Community Survey 5-Year Estimates (Tables B25032 & CP 04)



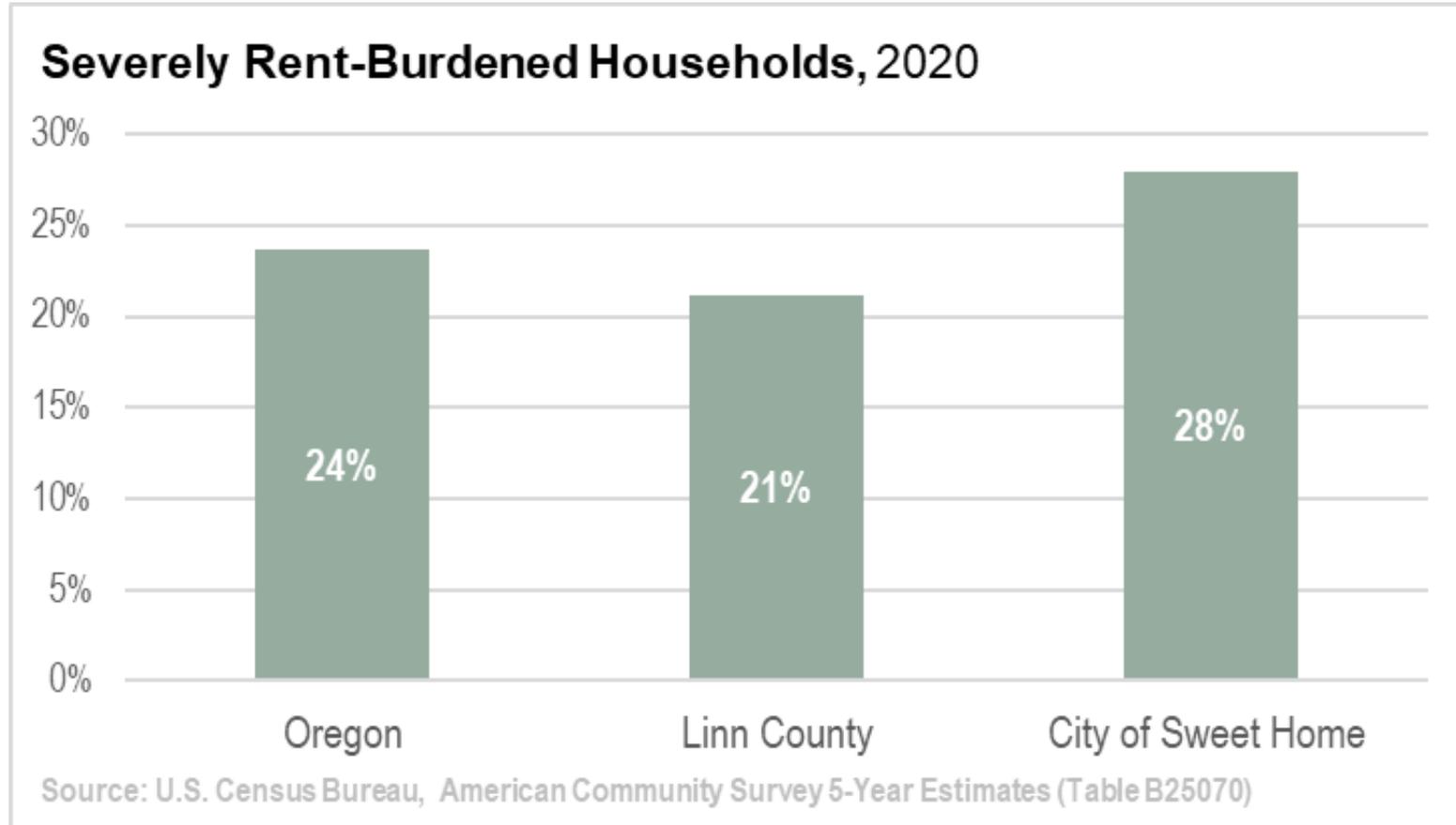
# Average Household Size

- **Average household size in Sweet Home has fluctuated in the last decade**
- **Locally, household size is now above**
- **Smaller households usually demand smaller “middle” dwelling types**



# Severe Rent Burden

- **Severe rent burden occurs when over 50% of income is spent on rent**
- **More than 1 in 4 households in Sweet Home experienced severe rent burden in 2020**
- **Since Pandemic, this share has likely increased**



# Median Home Prices in Select Markets

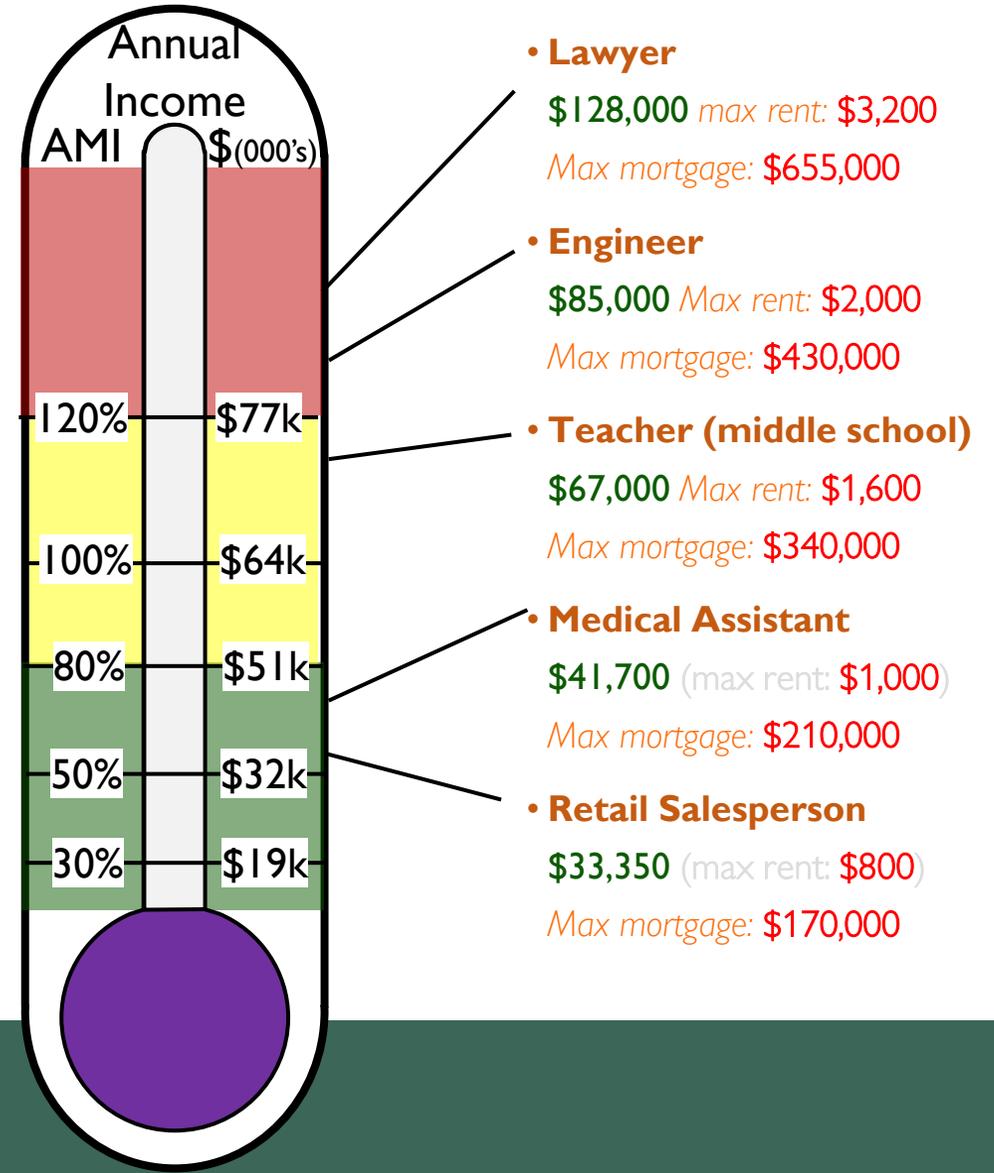
- Home sales prices have been growing rapidly in the region
- Median prices in Sweet Home are about **\$348,000**, up **\$104,000** in two years
- Sweet Home is still relatively affordable compared with surrounding cities

	Mar-20	Mar-21	Mar-22	Annual Change %
Sweet Home	\$244,000	\$283,000	\$348,000	19.4%
Lebanon	\$277,000	\$315,000	\$387,000	18.2%
Brownsville	\$300,000	\$346,000	\$420,000	18.3%
Albany	\$304,000	\$338,000	\$414,000	16.7%
Junction City	\$333,000	\$373,000	\$447,000	15.9%

*Source: Zillow.com; analysis by FCS Group 4/18/22*

# Attainable Housing Thermometer

- The median income of all households
- HUD measures affordability by county
- HUD bases affordability on household size
- Useful for contextualizing home prices based on the affordability of expected monthly payments
- Allows for quantification of the suitability for housing types by income level



# Projected Housing Needs

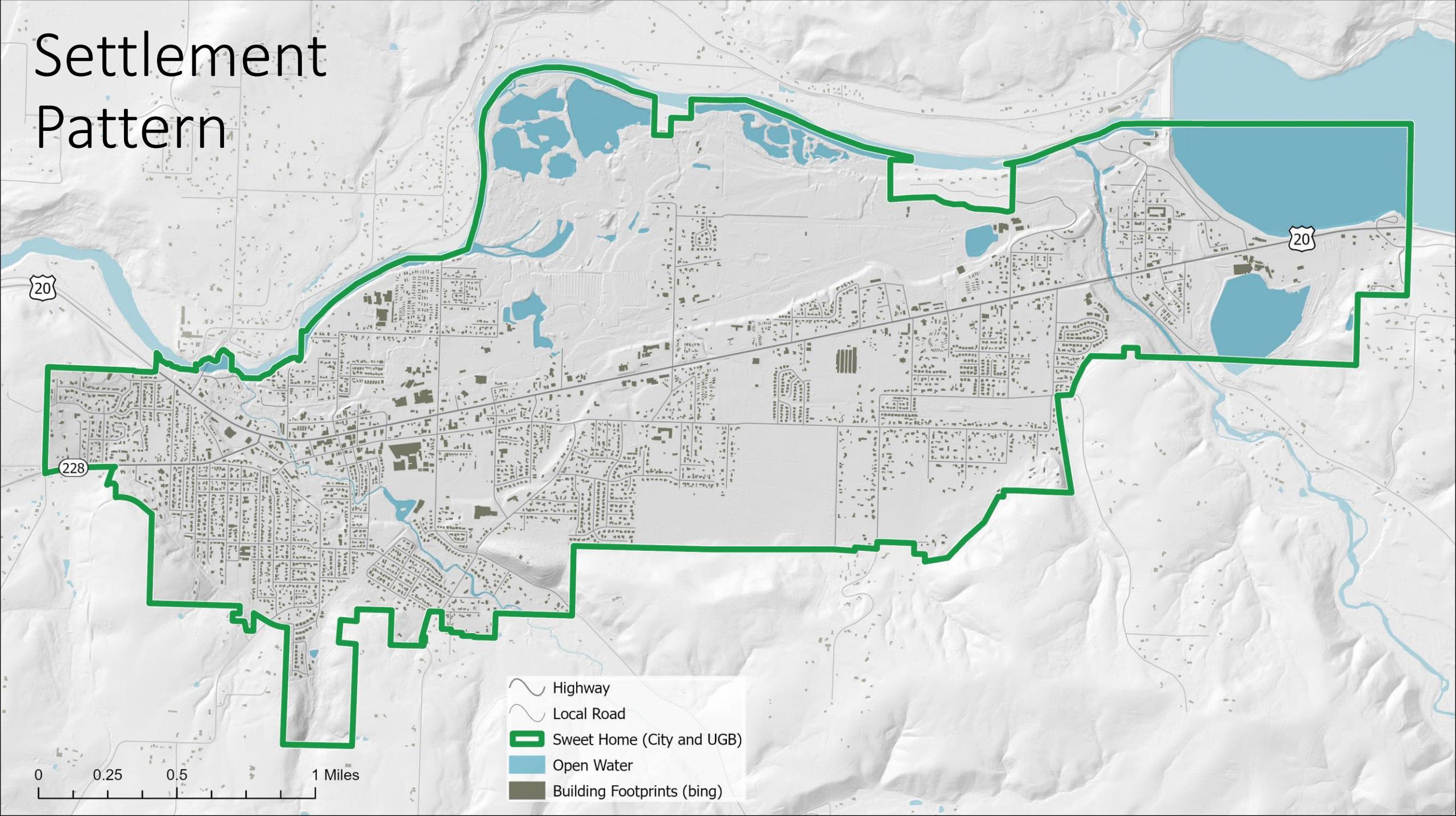
- **Baseline forecast = 632 new housing units and 15 people living in shared housing**
- **Potential Housing Mix: 73% detached and 14% middle housing types**
- **This forecast addresses population growth needs only; not replacement needs**

	Owner-Occupied Dwelling Units	Renter-Occupied Dwelling Units	Vacancy Assumption	Dwelling Units
<b>Housing Tenure Distribution:</b>	<b>363</b>	<b>238</b>	<b>31</b>	<b>632</b>
<b>Housing Type Distribution</b>				
Single Family Detached	325	114	20	460
Townhomes / Plexes	-	32	10	42
Multi family (5+ units)	-	45	0	45
Mfg. home/cottages	38	47	0	85
<b>Total</b>	<b>363</b>	<b>238</b>	<b>31</b>	<b>632</b>
<b>Group quarters (pop)</b>				<b>15</b>

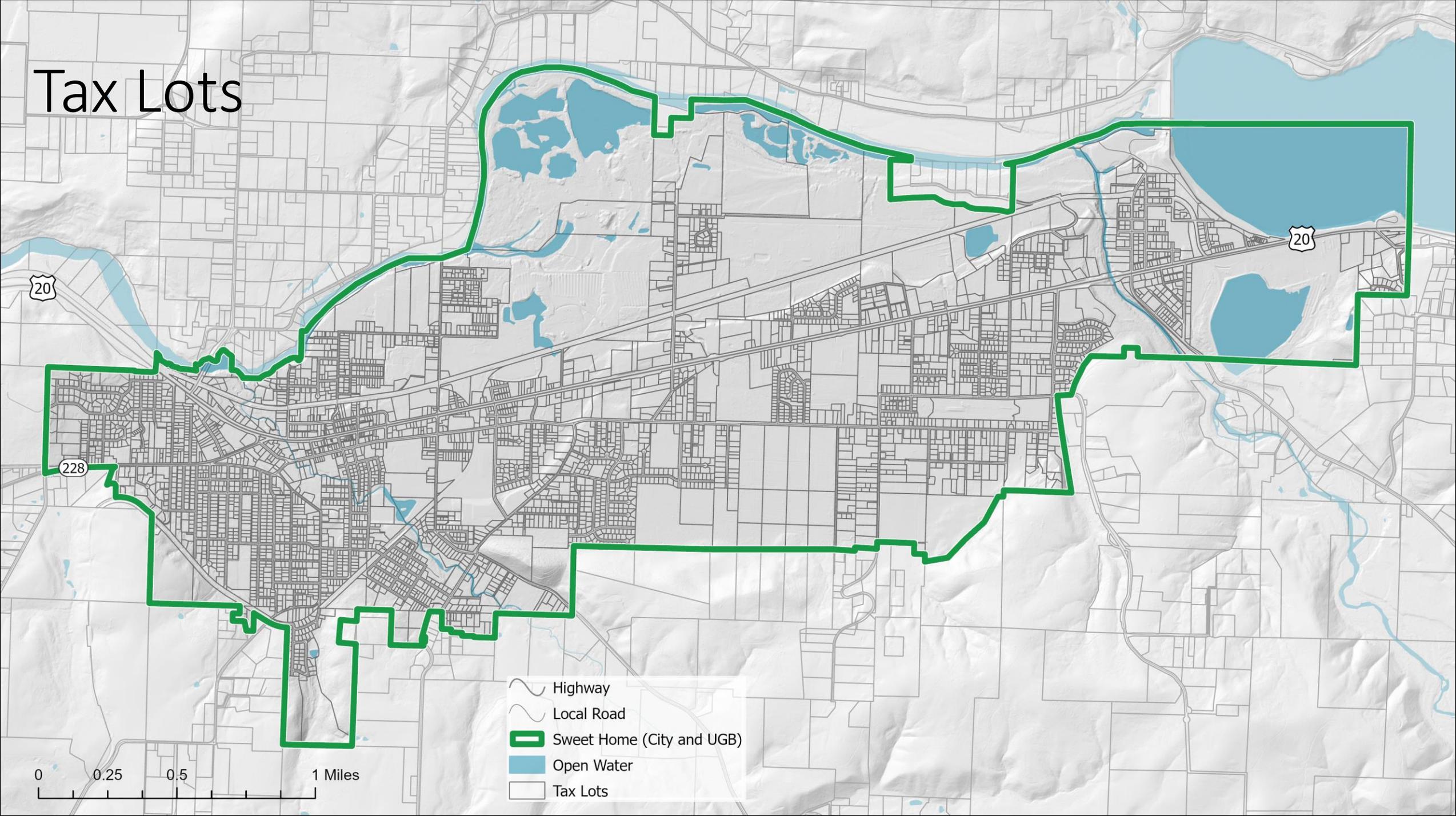
*U.S. Census Bureau, American Community Survey 5-Year Estimates (Tables B25032 and CP04) & previous tables*

# Buildable Land Inventory

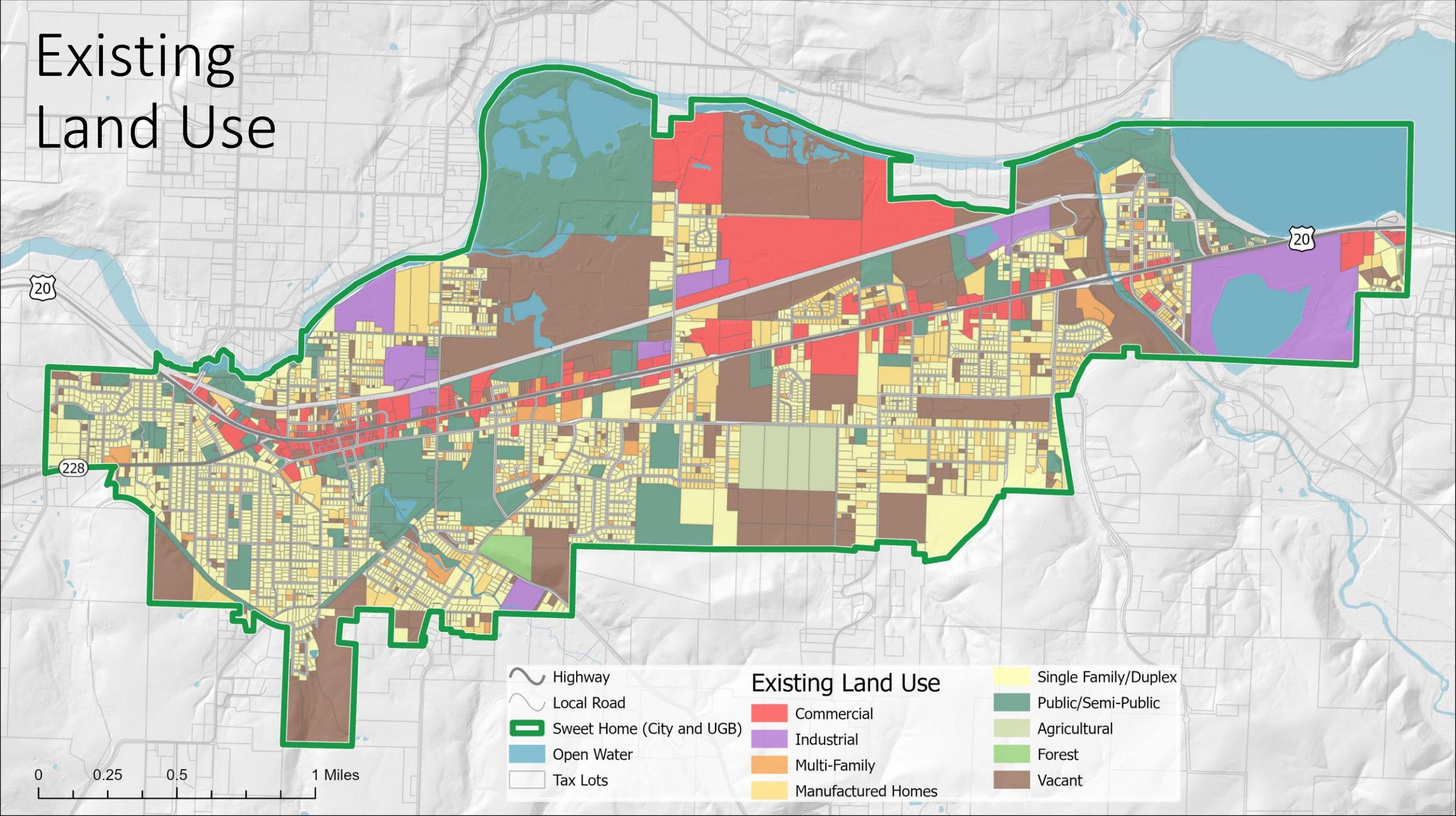
# Settlement Pattern



# Tax Lots



# Existing Land Use



# Zoning

20

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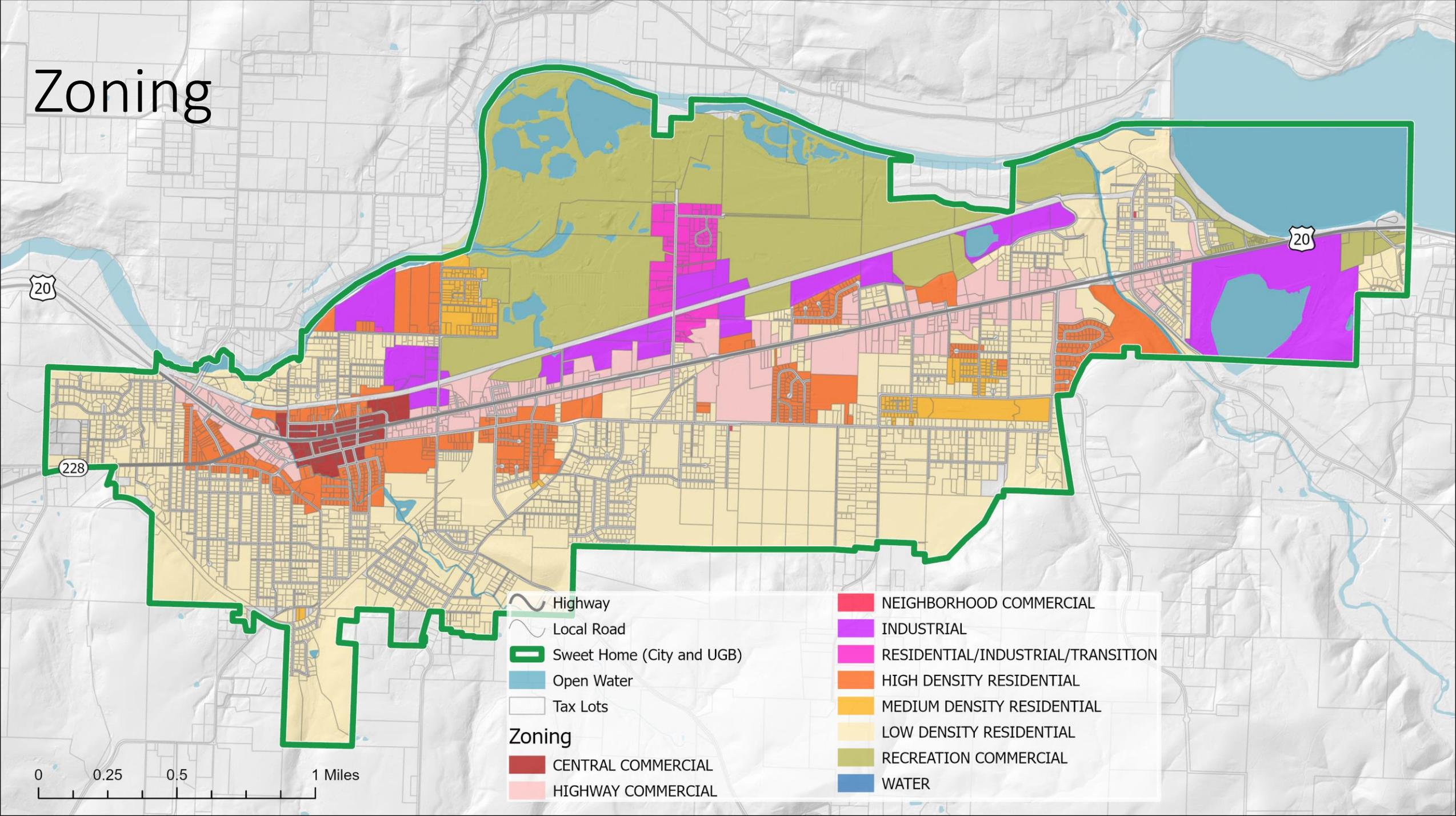
228

- Highway
- Local Road
- Sweet Home (City and UGB)
- Open Water
- Tax Lots

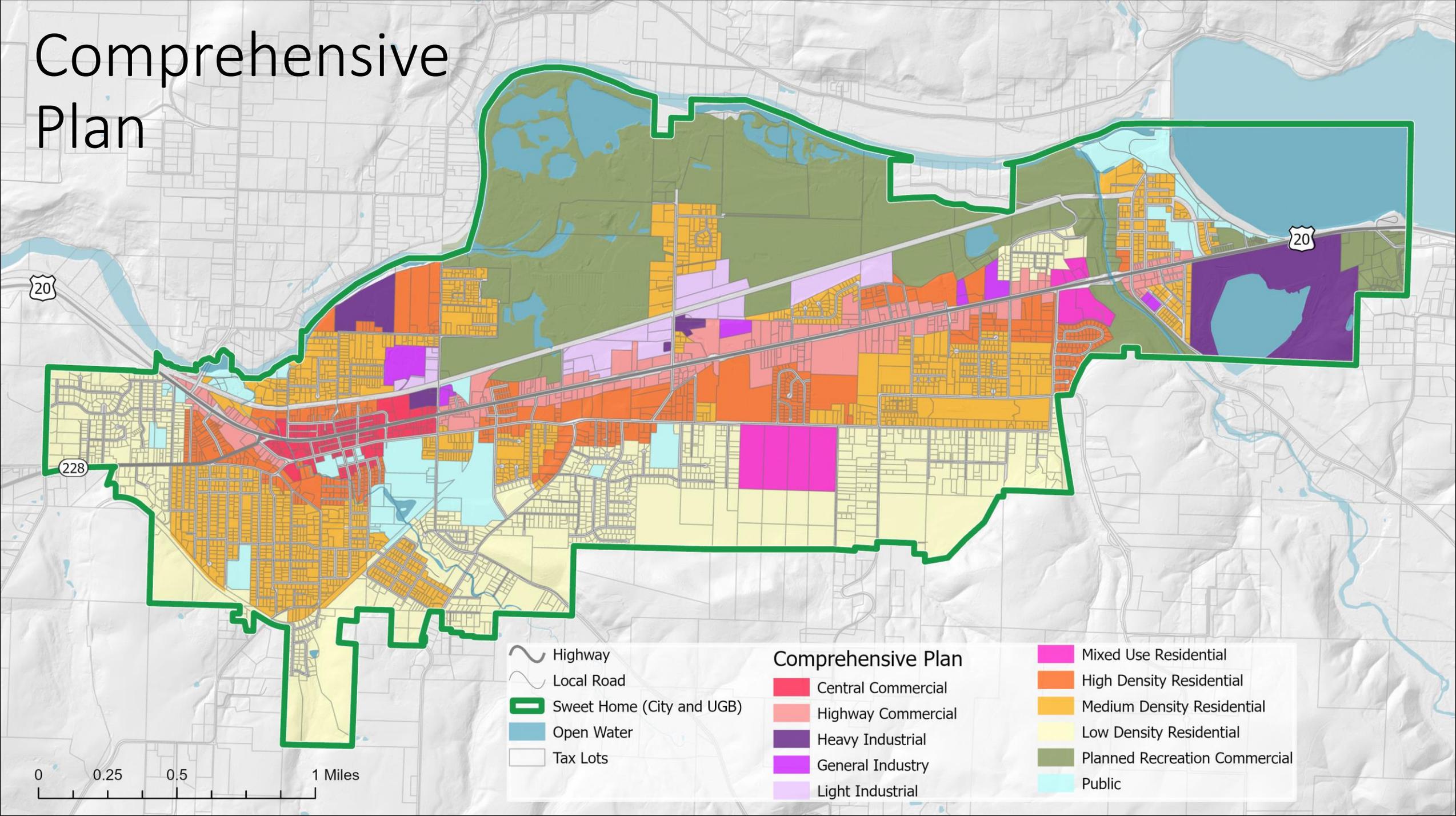
- Zoning**
- CENTRAL COMMERCIAL
  - HIGHWAY COMMERCIAL

- NEIGHBORHOOD COMMERCIAL
- INDUSTRIAL
- RESIDENTIAL/INDUSTRIAL/TRANSITION
- HIGH DENSITY RESIDENTIAL
- MEDIUM DENSITY RESIDENTIAL
- LOW DENSITY RESIDENTIAL
- RECREATION COMMERCIAL
- WATER

0 0.25 0.5 1 Miles



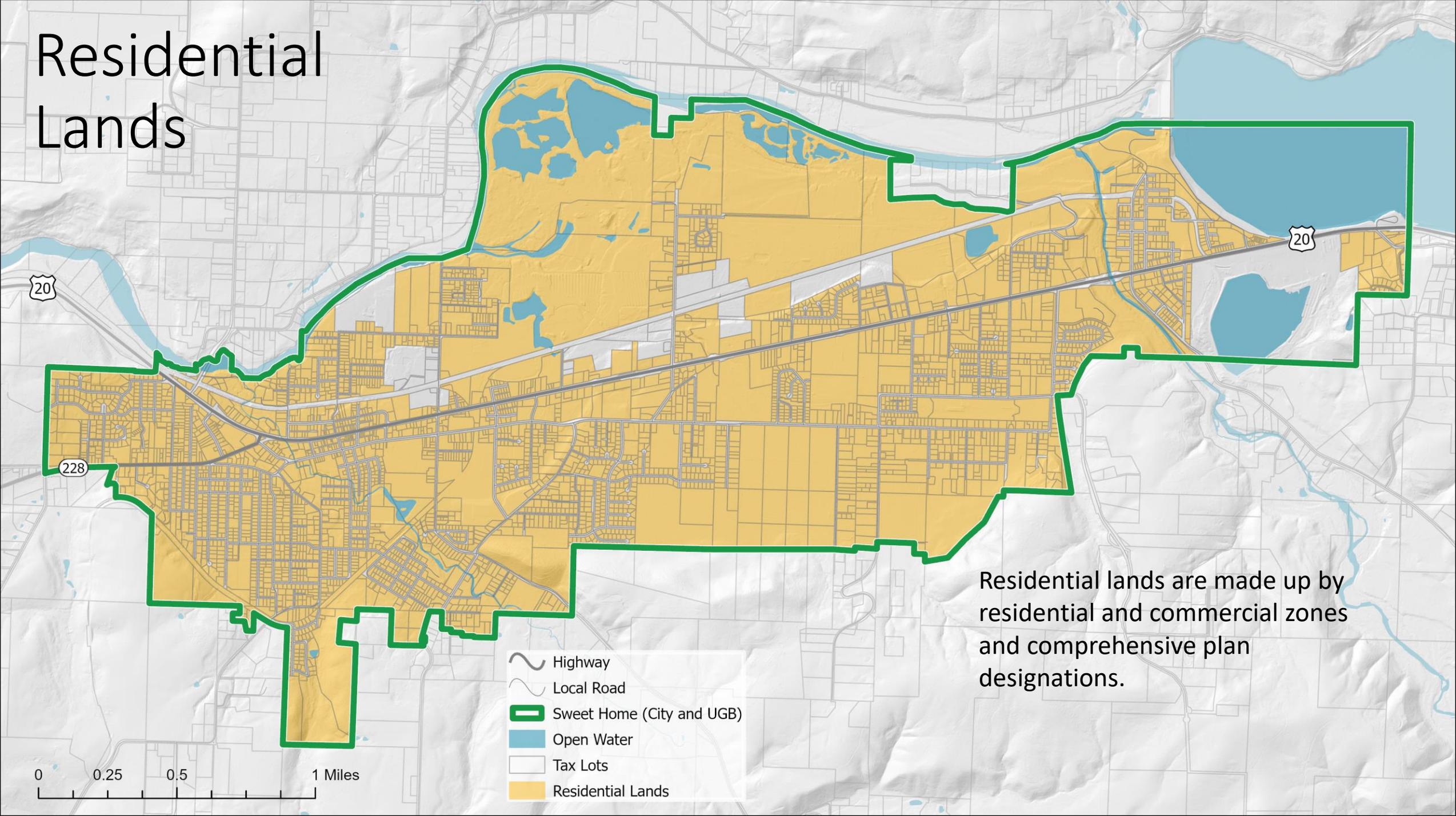
# Comprehensive Plan



0 0.25 0.5 1 Miles

 Highway	<b>Comprehensive Plan</b>	 Mixed Use Residential
 Local Road	 Central Commercial	 High Density Residential
 Sweet Home (City and UGB)	 Highway Commercial	 Medium Density Residential
 Open Water	 Heavy Industrial	 Low Density Residential
 Tax Lots	 General Industry	 Planned Recreation Commercial
	 Light Industrial	 Public

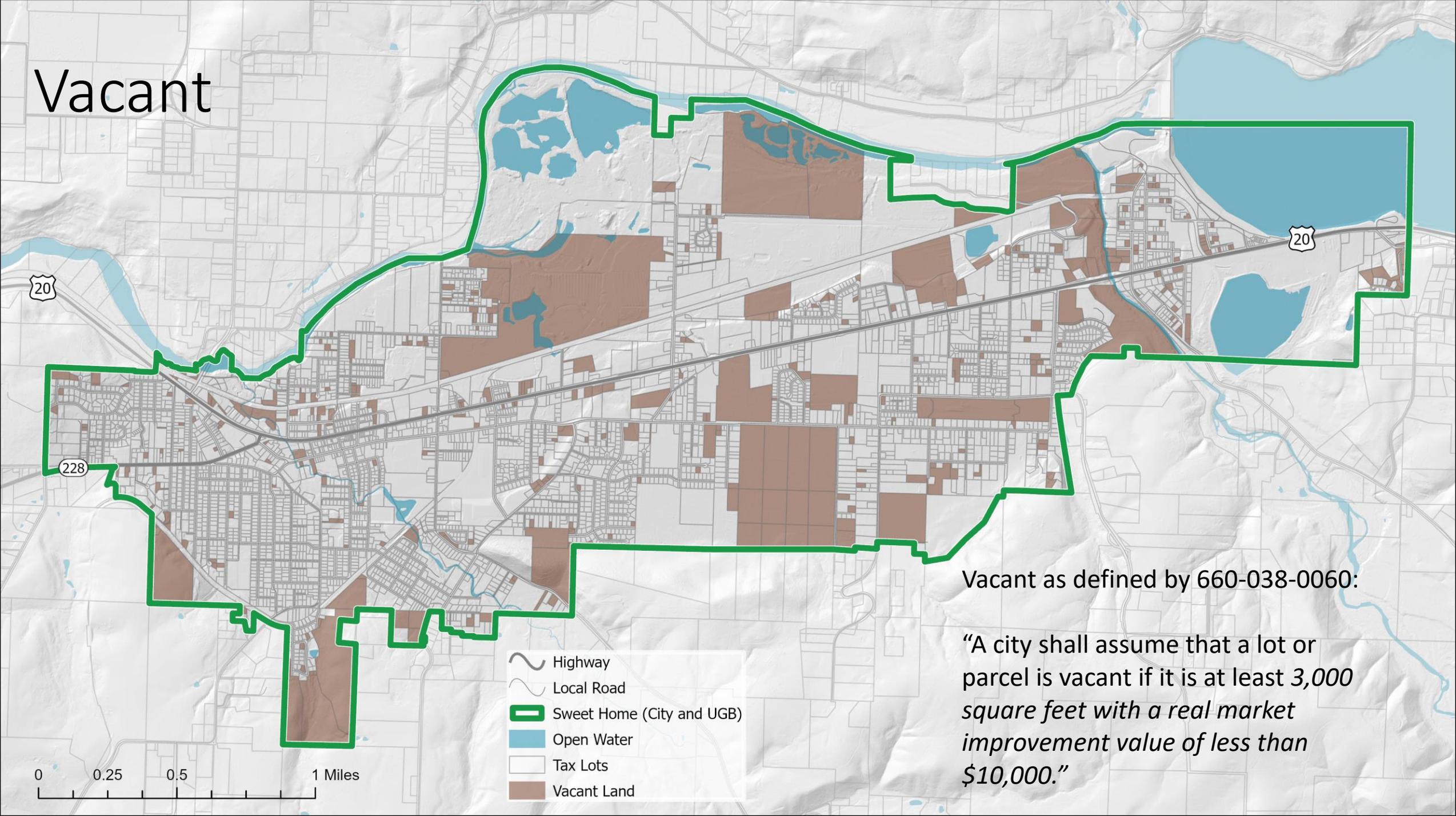
# Residential Lands



- Highway
- Local Road
- Sweet Home (City and UGB)
- Open Water
- Tax Lots
- Residential Lands

Residential lands are made up by residential and commercial zones and comprehensive plan designations.

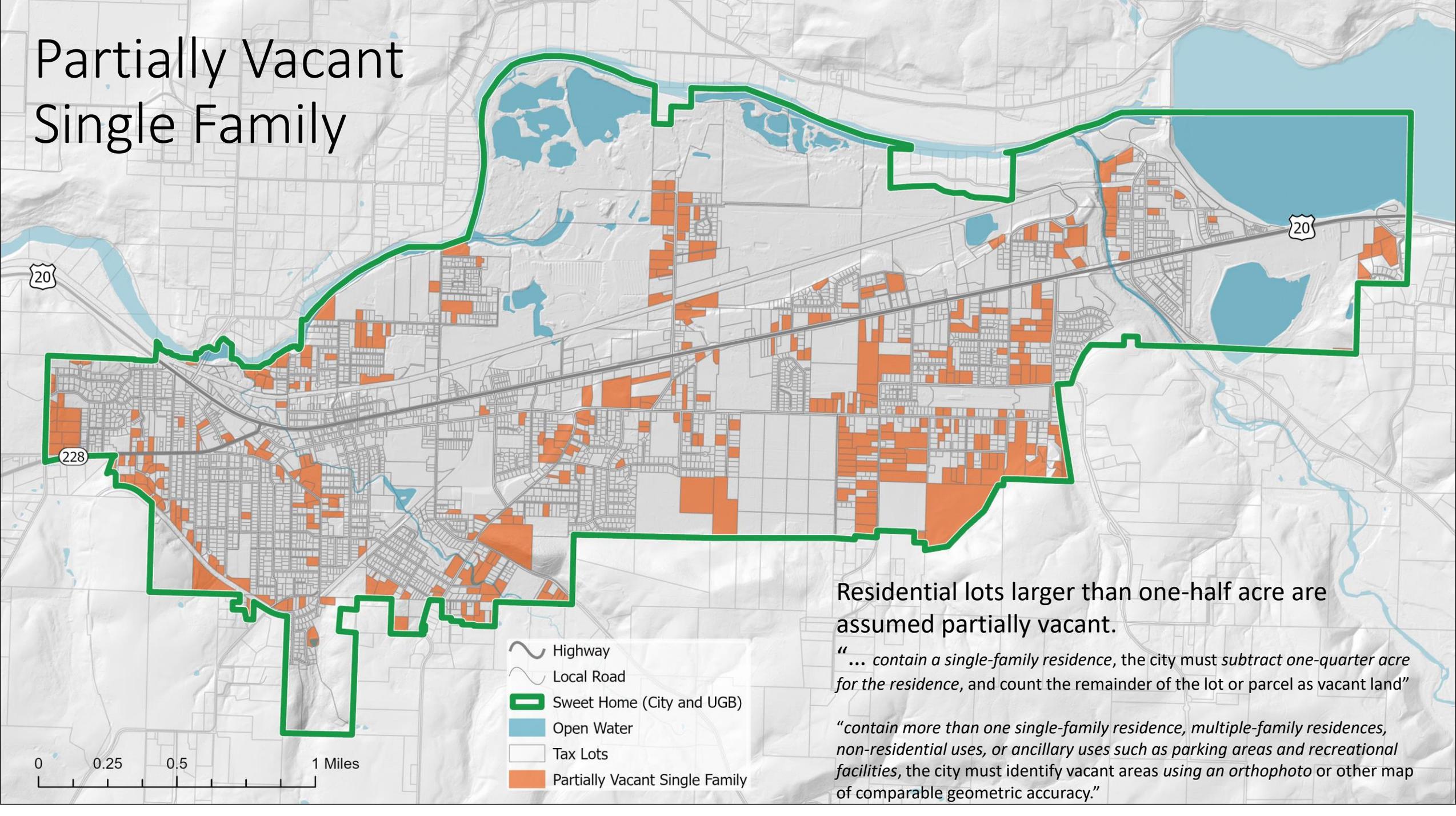
# Vacant



Vacant as defined by 660-038-0060:

*“A city shall assume that a lot or parcel is vacant if it is at least 3,000 square feet with a real market improvement value of less than \$10,000.”*

# Partially Vacant Single Family

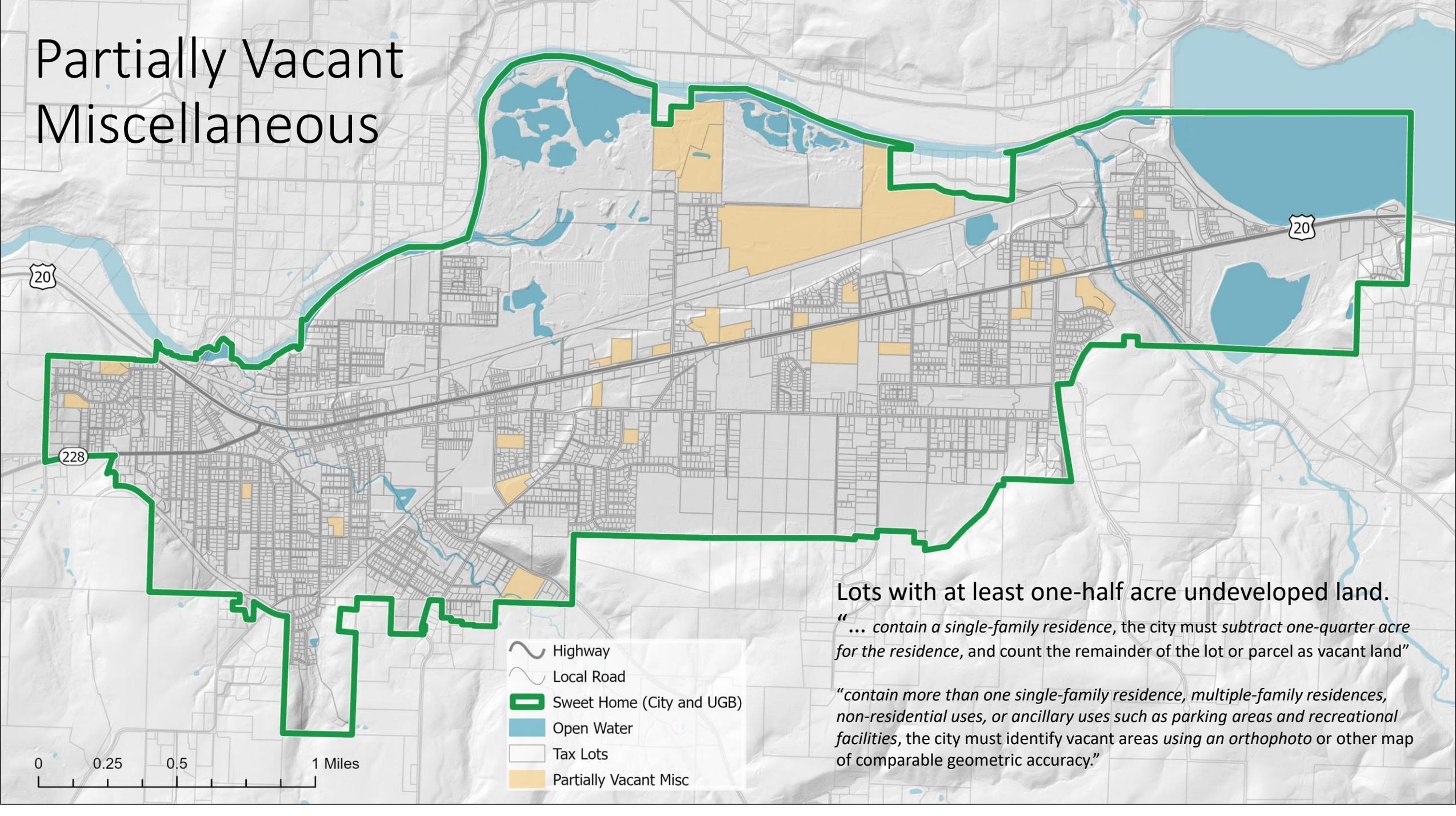


Residential lots larger than one-half acre are assumed partially vacant.

*"... contain a single-family residence, the city must subtract one-quarter acre for the residence, and count the remainder of the lot or parcel as vacant land"*

*"contain more than one single-family residence, multiple-family residences, non-residential uses, or ancillary uses such as parking areas and recreational facilities, the city must identify vacant areas using an orthophoto or other map of comparable geometric accuracy."*

# Partially Vacant Miscellaneous



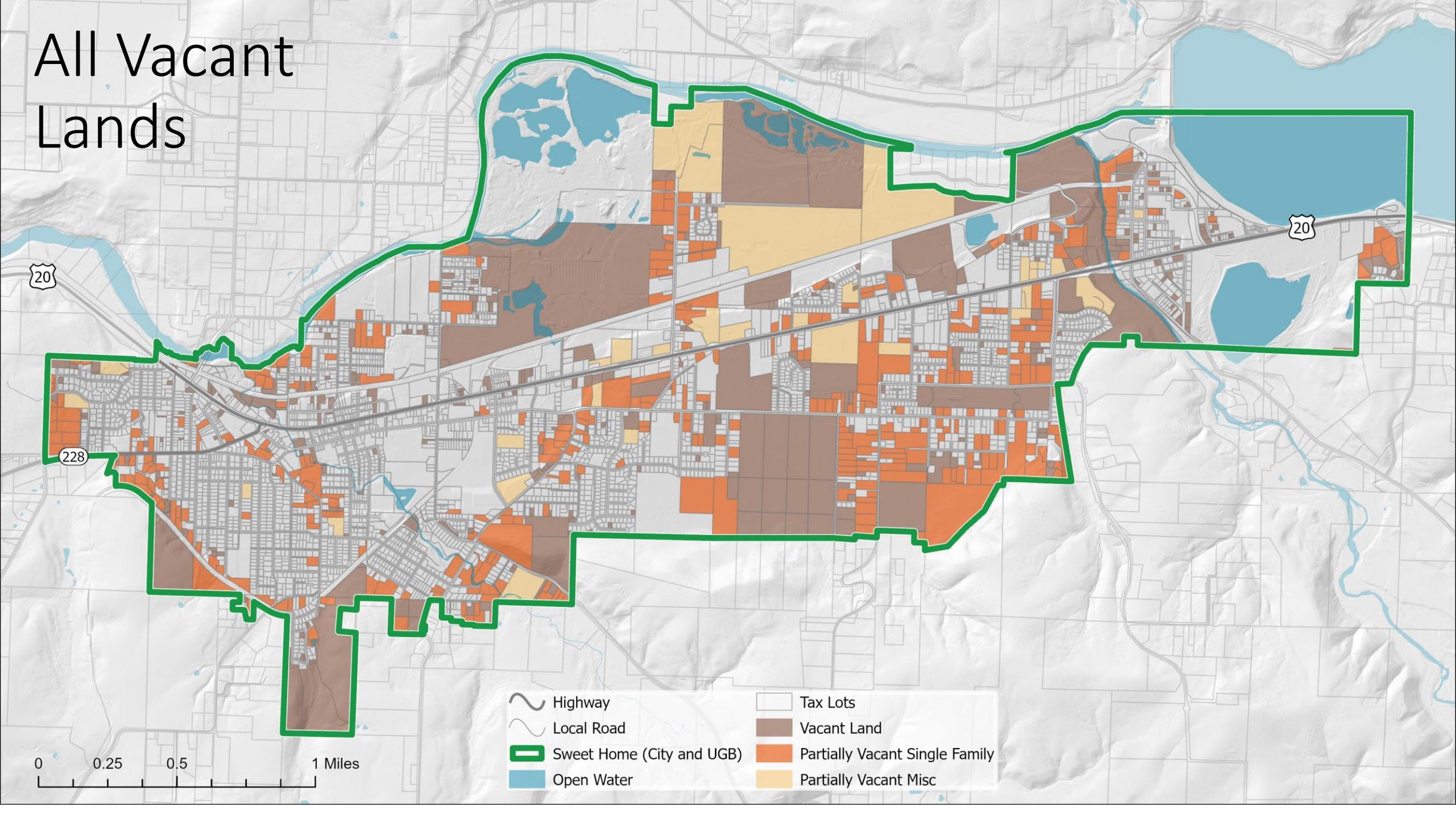
- Highway
- Local Road
- Sweet Home (City and UGB)
- Open Water
- Tax Lots
- Partially Vacant Misc

Lots with at least one-half acre undeveloped land.

*"... contain a single-family residence, the city must subtract one-quarter acre for the residence, and count the remainder of the lot or parcel as vacant land"*

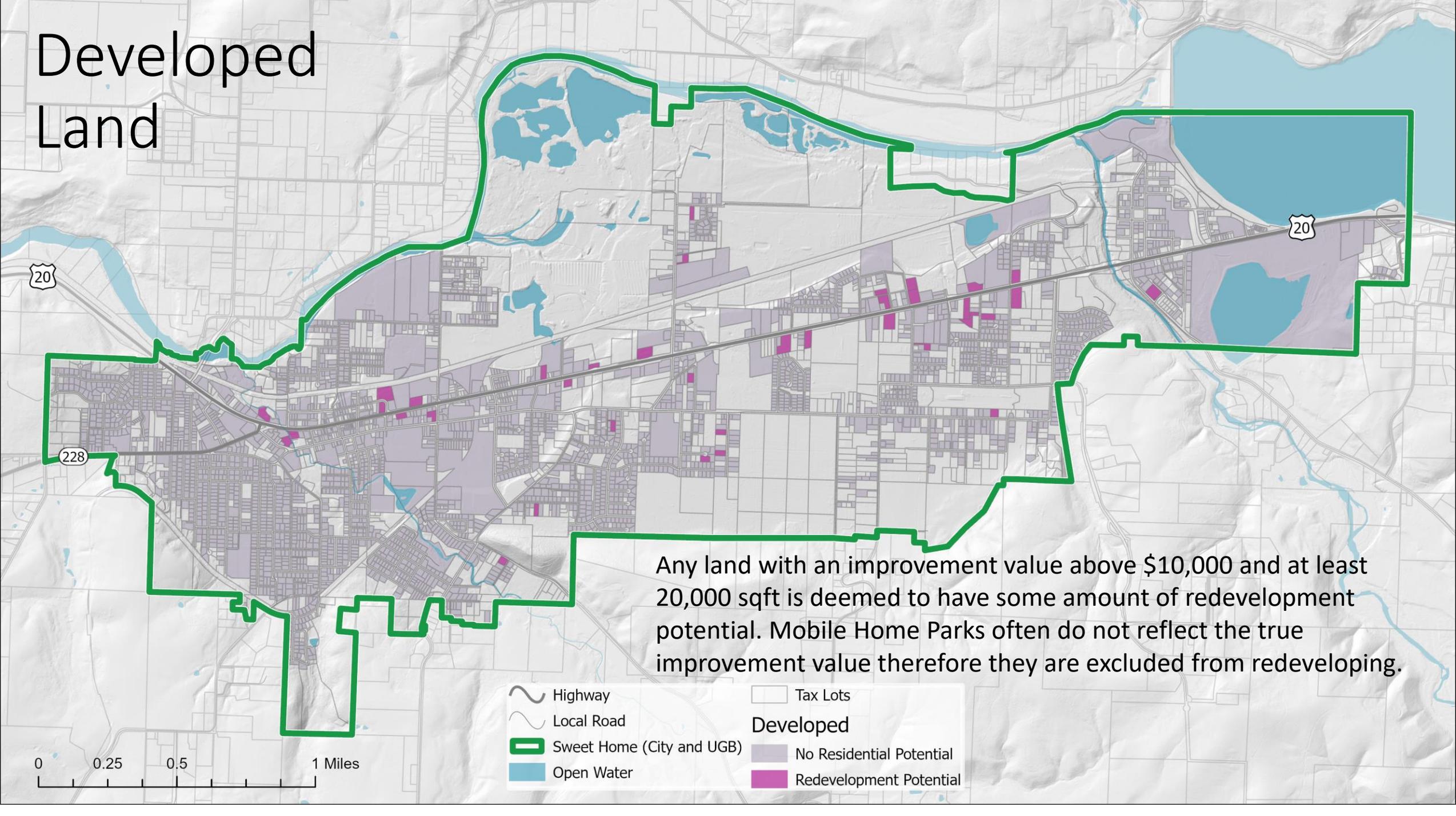
*"contain more than one single-family residence, multiple-family residences, non-residential uses, or ancillary uses such as parking areas and recreational facilities, the city must identify vacant areas using an orthophoto or other map of comparable geometric accuracy."*

# All Vacant Lands



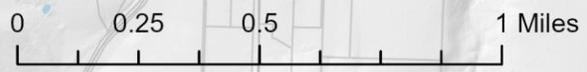
0 0.25 0.5 1 Miles

# Developed Land

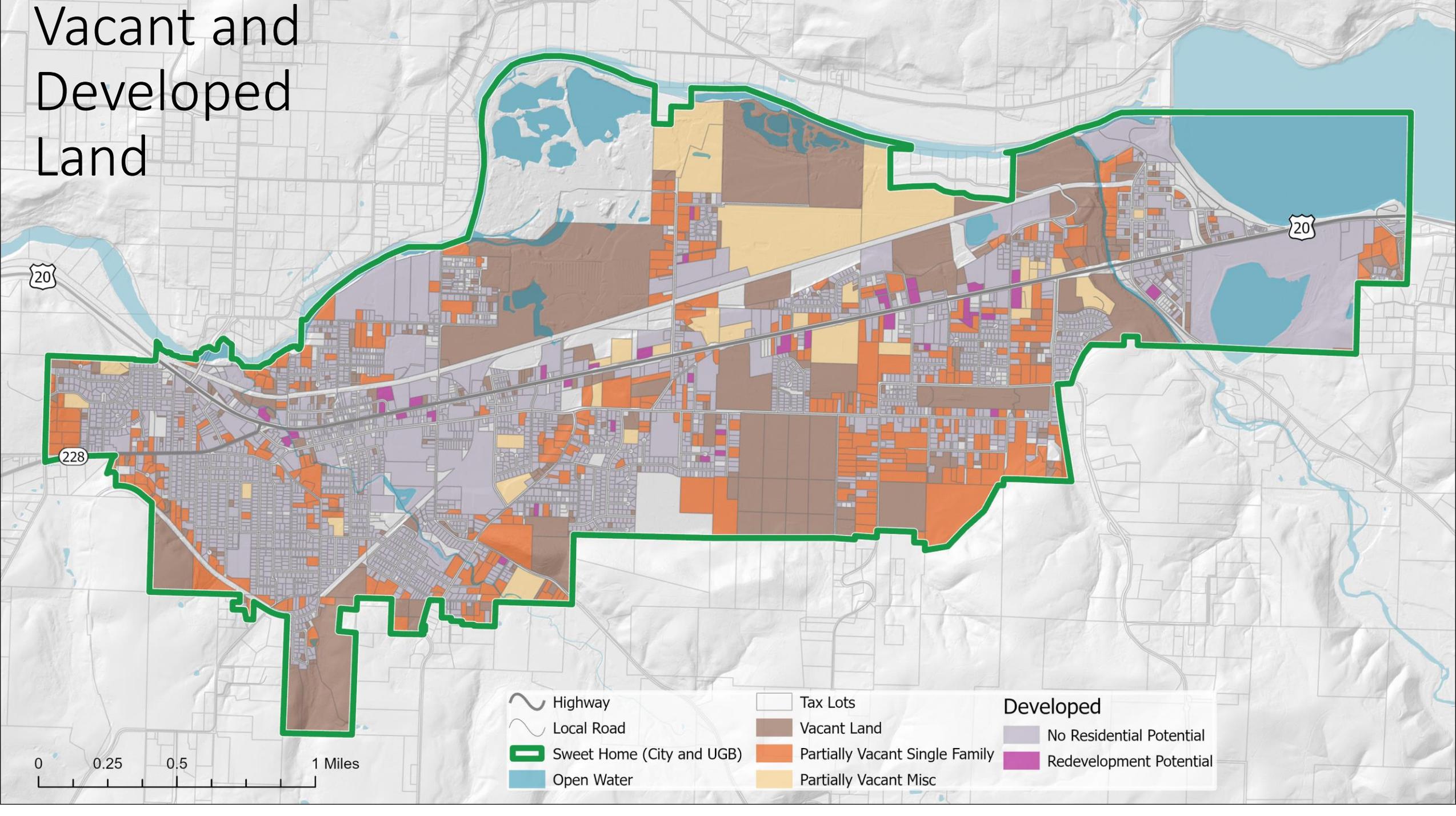


Any land with an improvement value above \$10,000 and at least 20,000 sqft is deemed to have some amount of redevelopment potential. Mobile Home Parks often do not reflect the true improvement value therefore they are excluded from redeveloping.

 Highway	 Tax Lots
 Local Road	<b>Developed</b>
 Sweet Home (City and UGB)	 No Residential Potential
 Open Water	 Redevelopment Potential



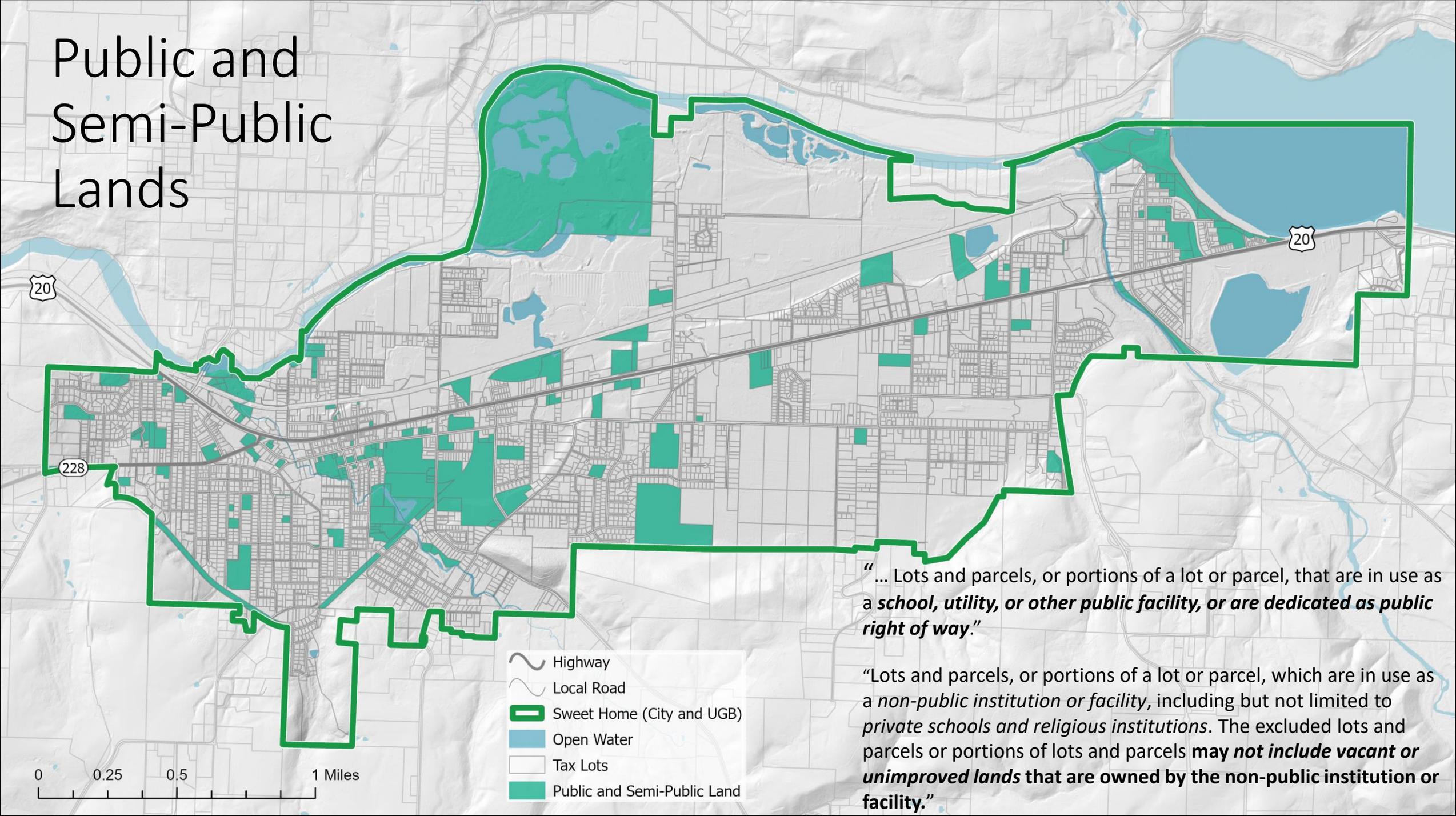
# Vacant and Developed Land



0 0.25 0.5 1 Miles

# Constraining Factors

# Public and Semi-Public Lands

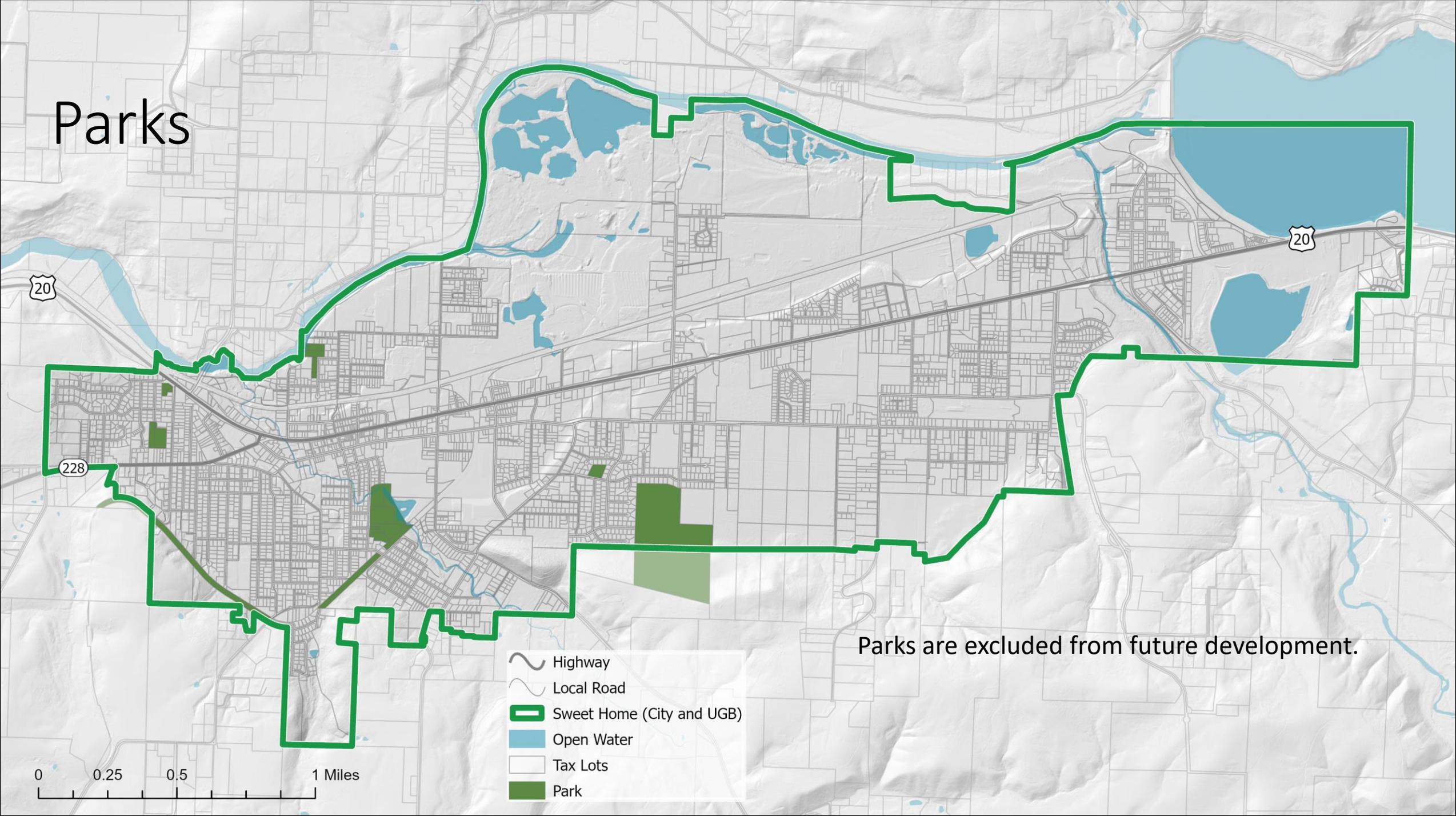


- Highway
- Local Road
- Sweet Home (City and UGB)
- Open Water
- Tax Lots
- Public and Semi-Public Land

“... Lots and parcels, or portions of a lot or parcel, that are in use as a **school, utility, or other public facility, or are dedicated as public right of way.**”

“Lots and parcels, or portions of a lot or parcel, which are in use as a **non-public institution or facility, including but not limited to private schools and religious institutions.** The excluded lots and parcels or portions of lots and parcels **may not include vacant or unimproved lands that are owned by the non-public institution or facility.**”

# Parks

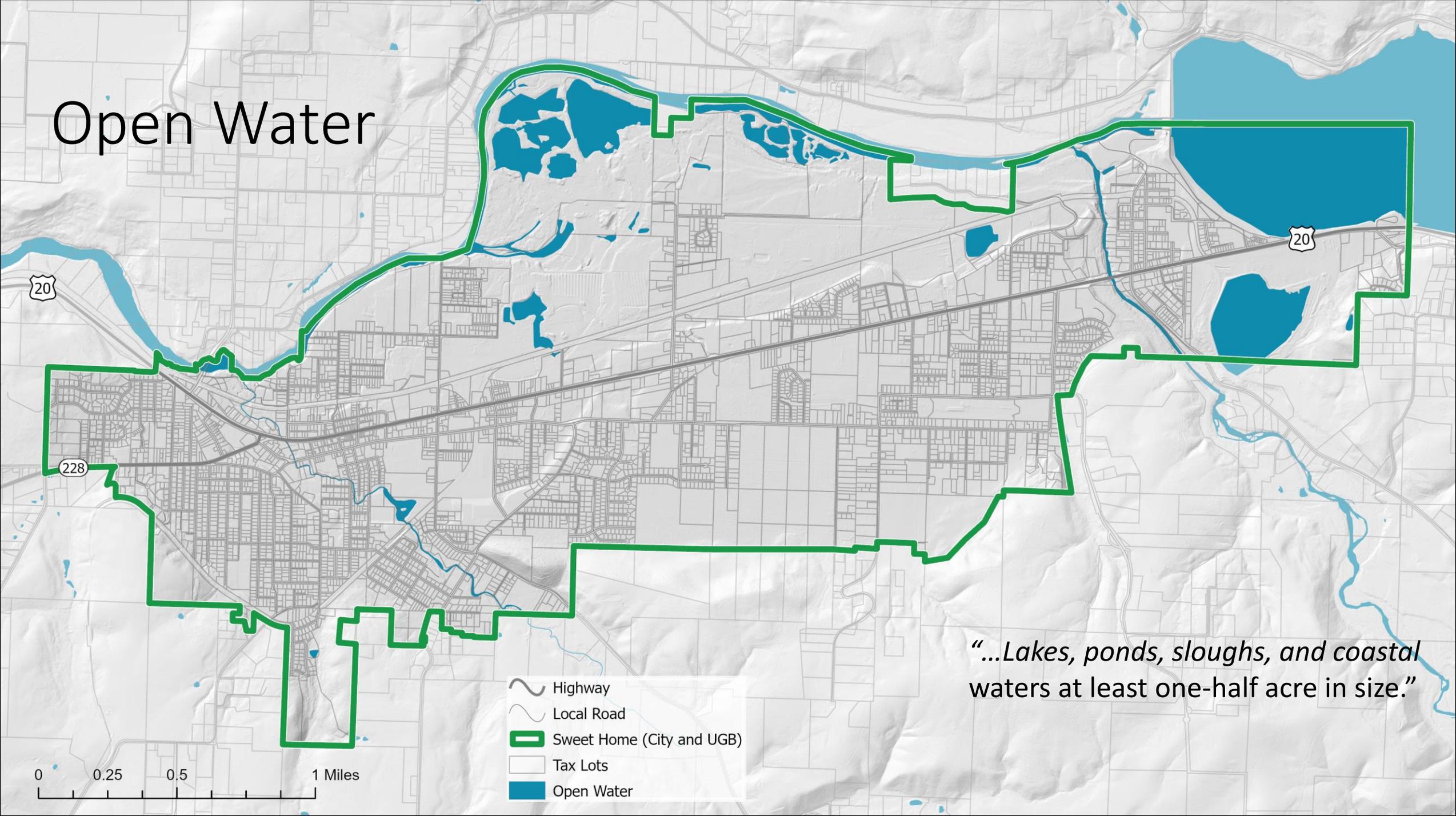


- Highway
- Local Road
- Sweet Home (City and UGB)
- Open Water
- Tax Lots
- Park

Parks are excluded from future development.

0 0.25 0.5 1 Miles

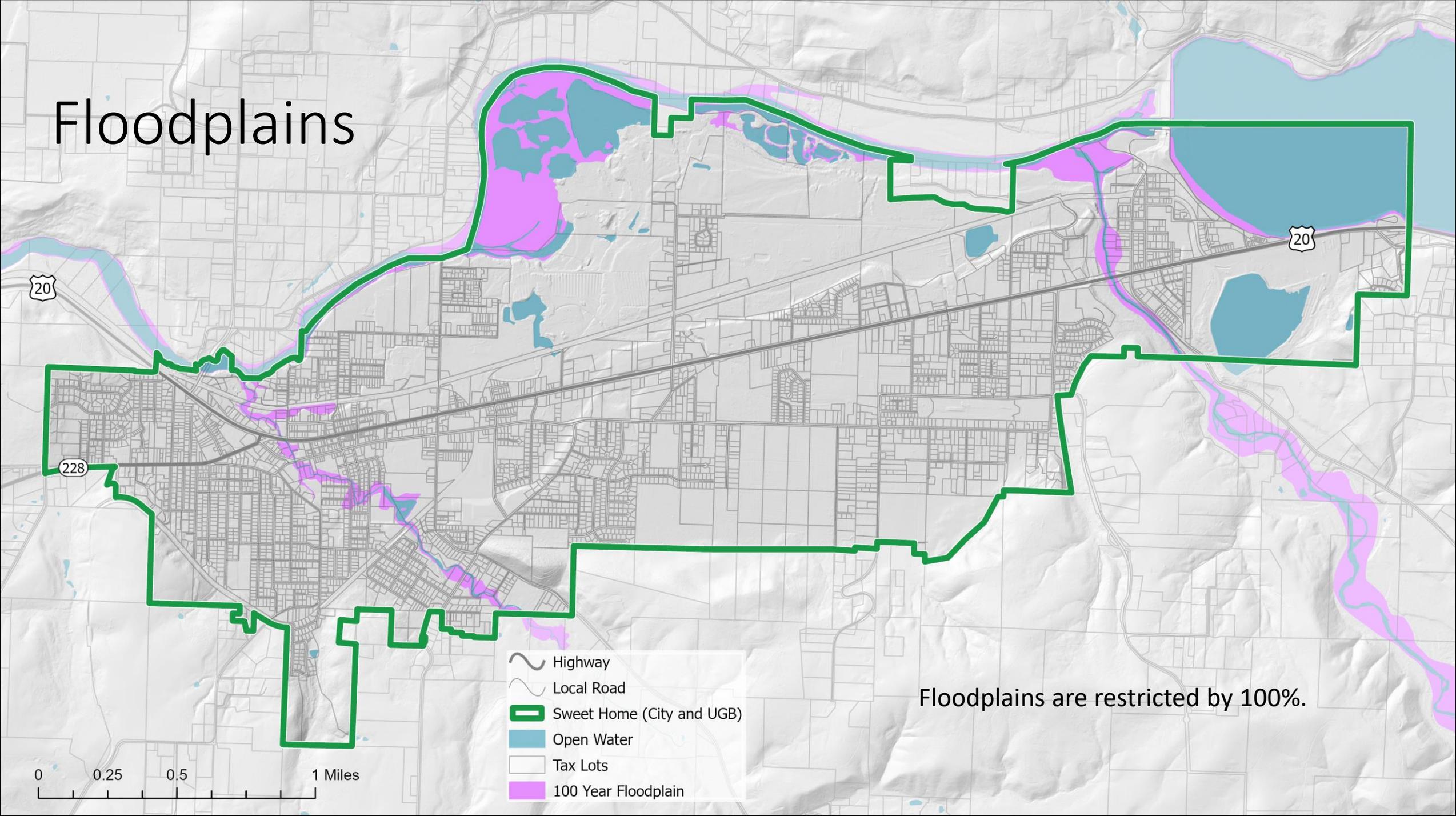
# Open Water



-  Highway
-  Local Road
-  Sweet Home (City and UGB)
-  Tax Lots
-  Open Water

*“...Lakes, ponds, sloughs, and coastal waters at least one-half acre in size.”*

# Floodplains



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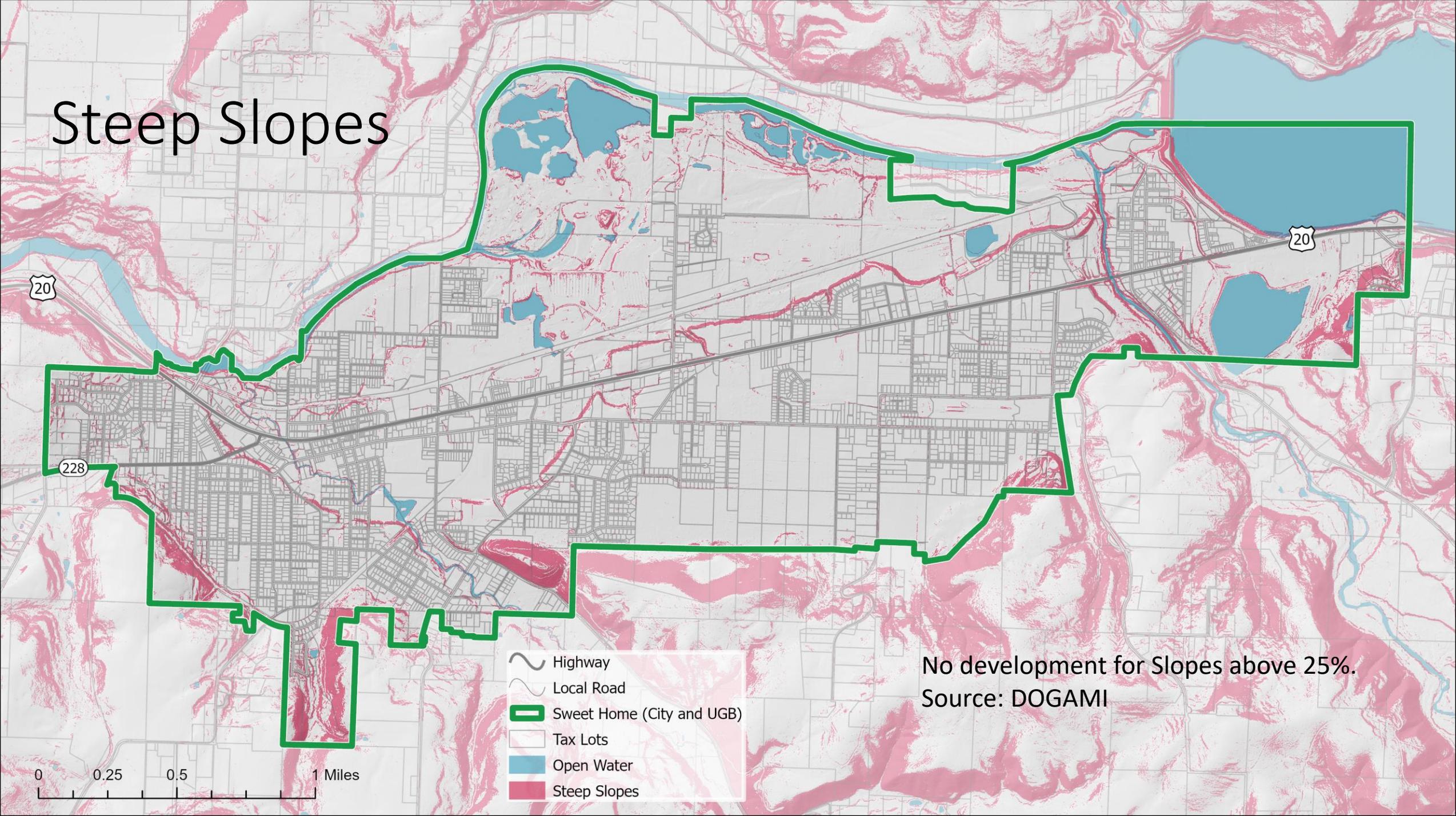
228

- Highway
- Local Road
- Sweet Home (City and UGB)
- Open Water
- Tax Lots
- 100 Year Floodplain

0 0.25 0.5 1 Miles

Floodplains are restricted by 100%.

# Steep Slopes

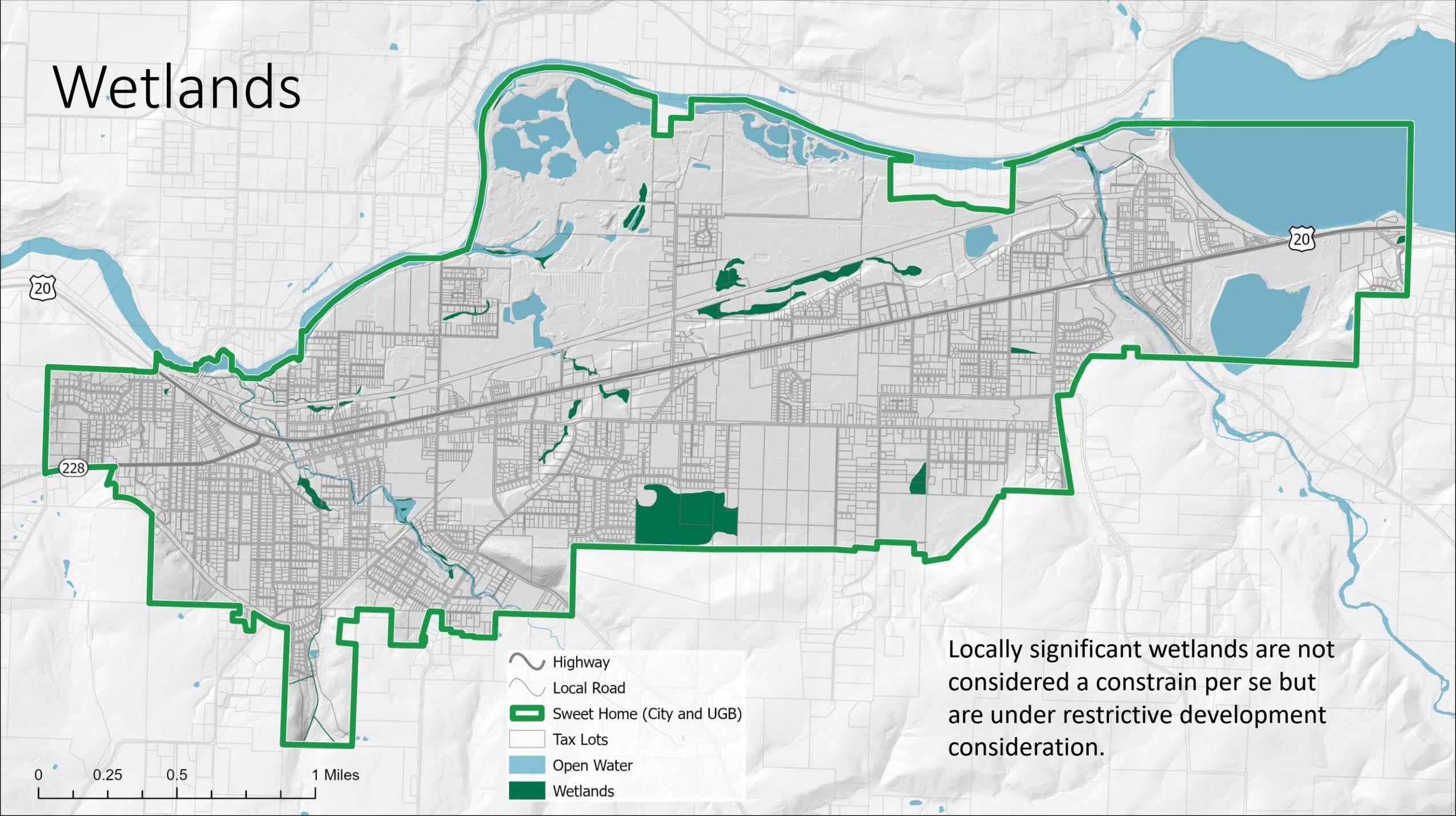


- Highway
- Local Road
- Sweet Home (City and UGB)
- Tax Lots
- Open Water
- Steep Slopes

No development for Slopes above 25%.  
Source: DOGAMI

0 0.25 0.5 1 Miles

# Wetlands



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20

228

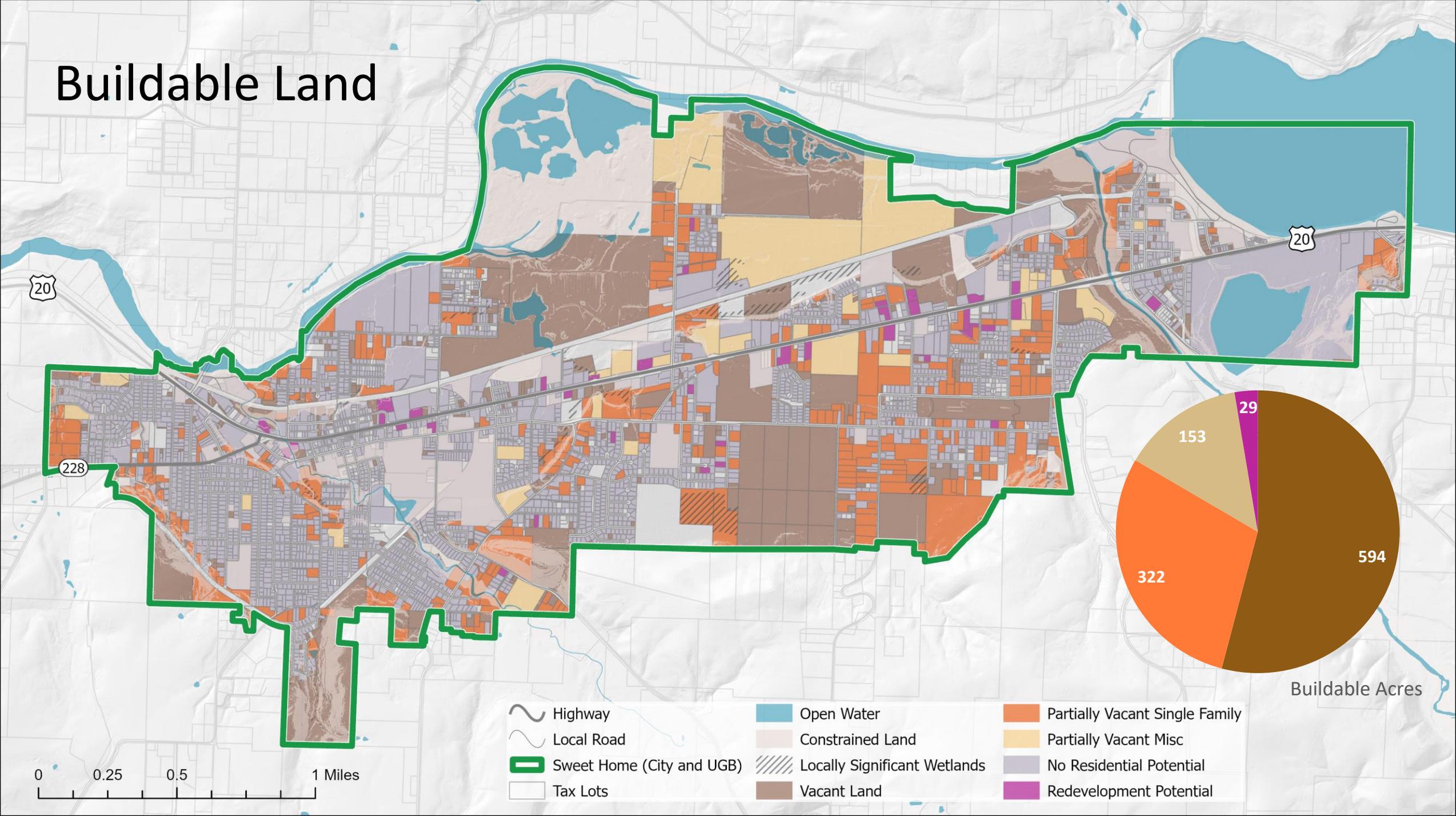
- Highway
- Local Road
- Sweet Home (City and UGB)
- Tax Lots
- Open Water
- Wetlands

0 0.25 0.5 1 Miles

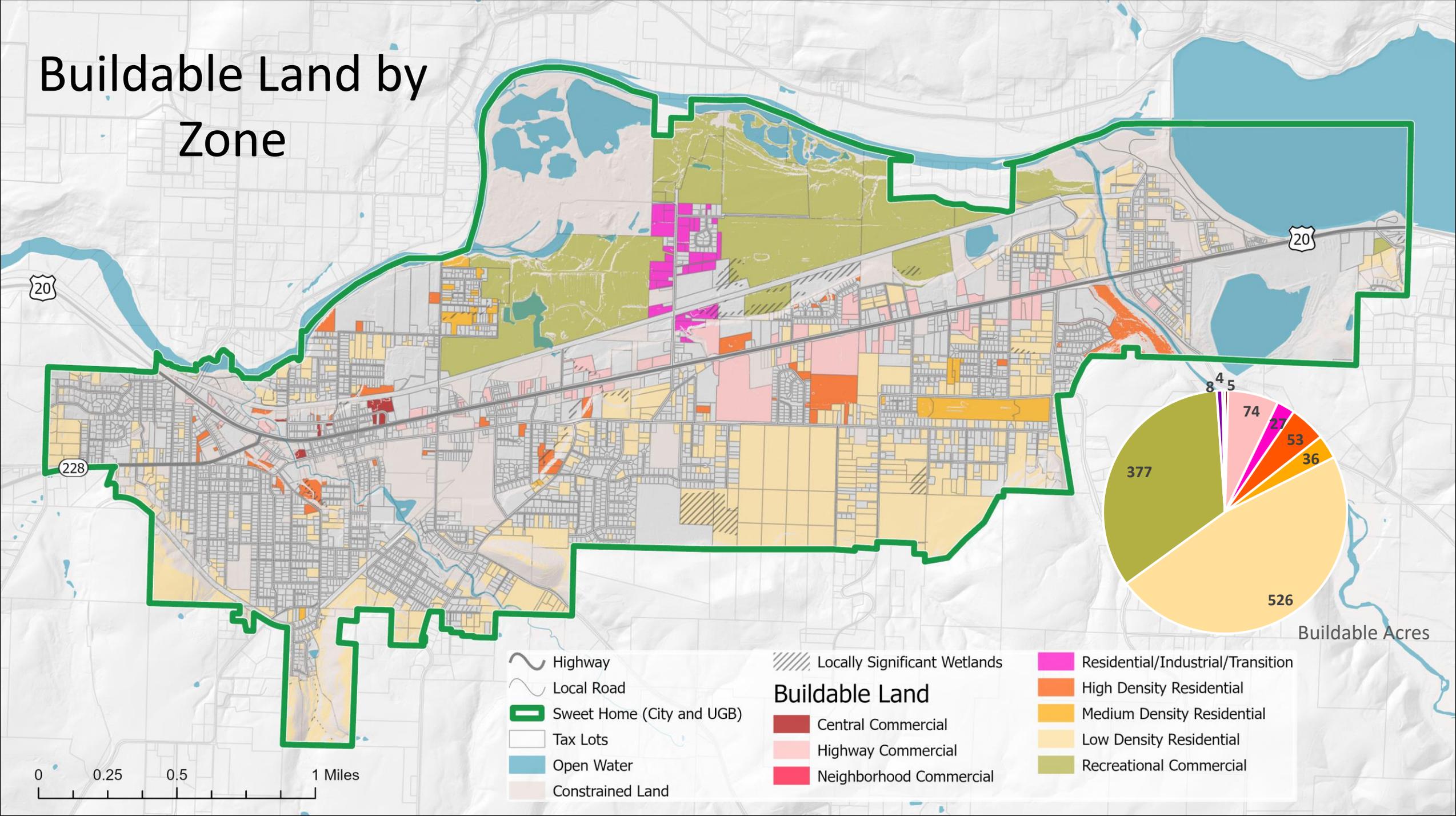
Locally significant wetlands are not considered a constrain per se but are under restrictive development consideration.

# **Buildable Land Supply**

# Buildable Land



# Buildable Land by Zone



0 0.25 0.5 1 Miles

- Highway
- Local Road
- Sweet Home (City and UGB)
- Tax Lots
- Open Water
- Constrained Land

- Buildable Land**
- Locally Significant Wetlands
  - Central Commercial
  - Highway Commercial
  - Neighborhood Commercial

- Residential/Industrial/Transition
- High Density Residential
- Medium Density Residential
- Low Density Residential
- Recreational Commercial

Buildable Acres

# **Draft Reconciliation of Residential Land Supply and Demand**

# Projected Housing Needs

- **Baseline forecast = 632 new housing units and 15 people living in shared housing**
- **Potential Housing Mix: 73% detached and 14% middle housing types**
- **This forecast addresses population growth needs only; not replacement needs**

	Owner-Occupied Dwelling Units	Renter-Occupied Dwelling Units	Vacancy Assumption	Dwelling Units
<b>Housing Tenure Distribution:</b>	<b>363</b>	<b>238</b>	<b>31</b>	<b>632</b>
<b>Housing Type Distribution</b>				
Single Family Detached	325	114	20	460
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Mfg. home/cottages	38	47	0	85
<b>Total</b>	<b>363</b>	<b>238</b>	<b>31</b>	<b>632</b>
<b>Group quarters (pop)</b>				<b>15</b>

*U.S. Census Bureau, American Community Survey 5-Year Estimates (Tables B25032 and CP04) & previous tables*

# Projected Residential Land Need (Demand)

- Baseline forecast shows demand for 169 gross acres to accommodate new housing units
- 144 acres for single family detached units, 25 acres for other housing types

Dwelling Unit Type	20-Year Dwelling Unit Demand	Applicable Plan Designation	Applicable Local Zones	Allowable Density (DU/Ac)	Avg. Development Density (DU/Ac)	Net Buildable Land Requirement	Gross Buildable Land Need*
Single Family Detached	460	LDR	RR-1, RR-2.5, LDR, R/IT, RC	1 to 5	4.0	115	144
Mfd. Homes & Cottages	85	MDR	MDR	3 to 10	6.5	13	16
Townhomes / Plexes	42	MDR	MDR	6 to 12	9.0	5	6
Multifamily (5+ units)	45	CC, HC, NC, HDR	CC, HC, NC, HDR	14 to 36	18.0	2	3
<b>Total</b>	<b>632</b>					<b>135</b>	<b>169</b>

Source: prior tables; and interpretation of current zoning code and housing development/market conditions.

\* Assumes 25% of site area required for future public facilities, roads, easements, etc.

# Buildable Land Inventory (Supply)

- 2,773 total residential acres in Sweet Home UGB
- 1,675 acres developed residential acres
- 1,098 gross acres of buildable land (minus constraints and exempt uses)

Zoning Categories	Developed/ Other	Vacant	Part Vacant & Redev.	Total Buildable	Total
Central Commercial	26	2	2	5	31
Highway Commercial	218	16	59	74	292
Neighborhood Commercial	0	0	0	0	0
Residential/Industrial/Transition	45	3	24	27	72
High Density Residential	200	34	19	53	253
Medium Density Residential	36	28	8	36	71
Low Density Residential	964	254	255	508	1,472
Recreation Commercial	171	251	126	377	548
RR-1	13	6	11	17	31
RR-2.5	2	0	1	1	3
<b>Total</b>	<b>1,675</b>	<b>594</b>	<b>504</b>	<b>1,098</b>	<b>2,773</b>

Source: Sweet Home Buildable Land Inventory August 16, 2022

# Reconciliation of Land Inventory

- Land supply is generally sufficient to accommodate 20-year housing needs.
- Overall residential land surplus of 929 acres
- Surplus is significant among lower density residential land
- Surplus is also ample among higher density lands.

Dwelling Unit Type	Applicable Zoning Designation	Gross Buildable Land Requirement	Current Buildable Land Inventory	Buildable Land Surplus (Deficit)
Single Family Detached	LDR, MDR, R/I/T,	144	965	805
Mfd. Homes & Cottages	RR-1, RR-2.5, RC	16		
Townhomes/Plexes (2-4 units)	HDR, C	6	133	124
Multifamily (5+ units)		3		
<b>Total</b>		<b>169</b>	<b>1,098</b>	<b>929</b>

Source: prior tables; and interpretation of current zoning code and housing development/market conditions.

# Next Steps



# Thank You



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