Talent
Housing Needs Analysis

CAC Meeting #1

August 10, 2016

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Overview of a Housing Needs Analysis

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Why is Talent doing an HNA

- How much growth?
- How much land?
- Where is the buildable land?
  - Vacant; unconstrained physically or by policy
- What development patterns make sense?
- Does Talent have enough buildable residential land?

Housing: Demand v. Need

- *Housing need* is based on the principle that a community's plan for housing should meet the needs of households at all income levels.
- *Housing market demand* is what households demonstrate they are willing to purchase in the marketplace.

- Need
  - Type
  - Tenure
  - Financial
  - Condition
  - Crowding
  - Special Populations
- Demand
  - Evidenced by recent development trends (e.g., type, price, and mix)

Parts of a Housing Needs Analysis

- *Demand* is a function of population and employment growth
- *Supply* is a function of land base and housing stock

- Demand
  - Population
  - Demographics
    - Age
    - Household composition
  - Income
  - Housing costs
- Supply
  - Vacant, partially vacant, and redevelopable land
  - Housing stock and characteristics

Determining Housing Demand

- Builds from population forecasts
- Requires assumptions about:
  - Persons in group quarters
  - Household size
  - Mix
  - Vacancy rates
- Needed units/density gives needed acres

Typical Method for Calculating Needed Dwelling Units

Future population
-Current population

=population increase
-persons in group quarters

=persons in new dwelling units
÷persons per dwelling unit

=occupied dwelling units
-demolitions
+vacant dwelling units

+ additional units needed to accommodate decreased household size of existing households

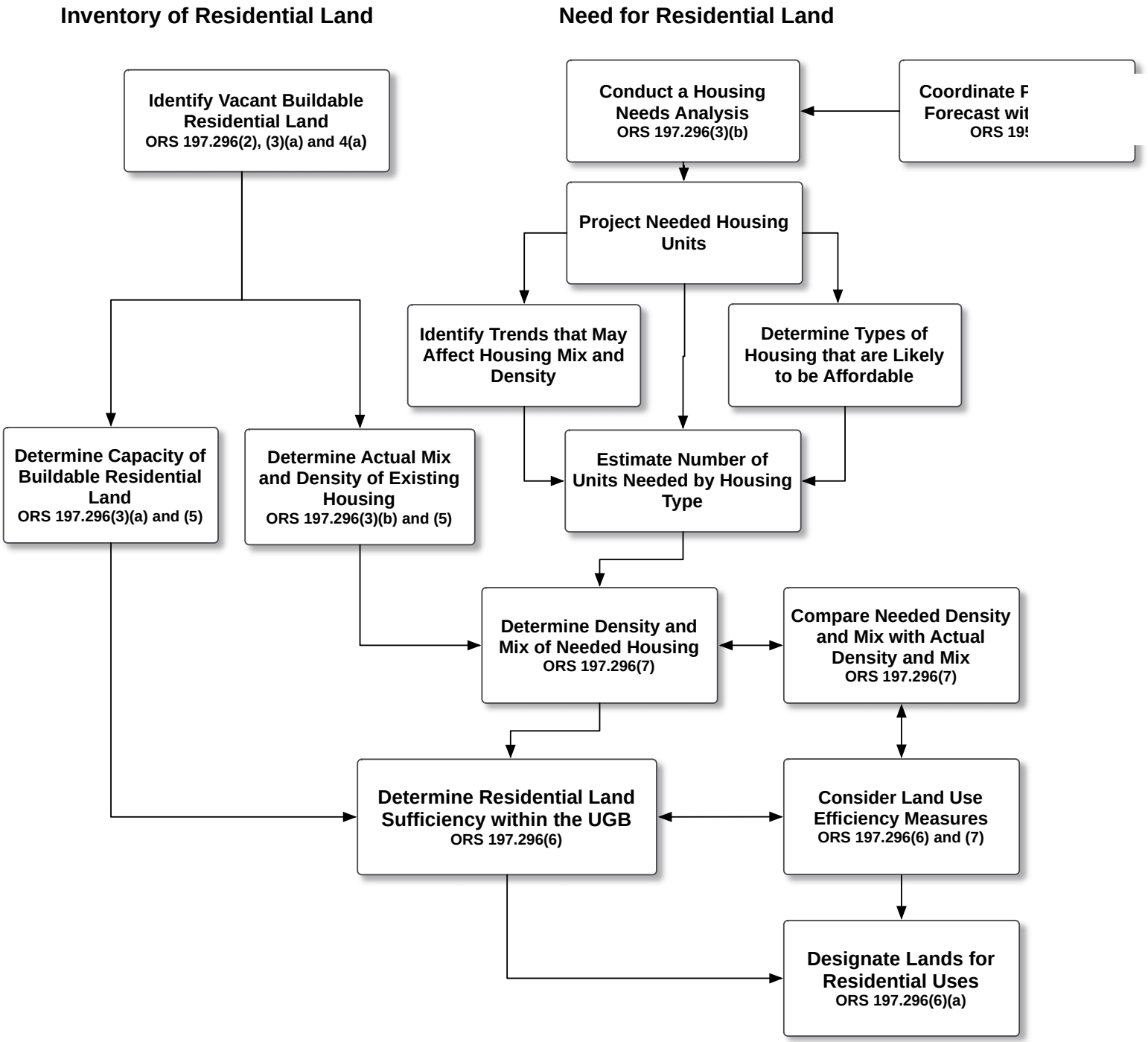
= Total needed dwelling units

Goal 10: Housing

“Buildable lands for residential use shall be inventoried and plans shall encourage the availability of adequate numbers of needed housing units at price ranges and rent levels which are commensurate with the financial capabilities of Oregon households and allow for flexibility of housing location, type and density.”

Needed Housing Types (ORS 197.303)

- Housing that includes, but is not limited to, attached and detached single-family housing and multiple family housing for both owner and renter occupancy;
- Government assisted housing;
- Mobile home or manufactured dwelling parks as provided in ORS 197.475 to 197.490; and;
- Manufactured homes on individual lots planned and zoned


Inventory of Residential Land
Need for Residential Land
Identify Vacant Buildable Residential Land
ORS 197.296(2), (3)(a) and 4(a)
Conduct a Housing Needs Analysis
ORS 197.296(3)(b)
Coordinate F
Forecast wit
ORS 19
Project Needed Housing Units
Identify Trends that May Affect Housing Mix and Density
Determine Types of Housing that are Likely to be Affordable
Determine Capacity of Buildable Residential Land
ORS 197.296(3)(a) and (5)
Determine Actual Mix and Density of Existing Housing
ORS 197.296(3)(b) and (5)
Estimate Number of Units Needed by Housing Type
Determine Density and Mix of Needed Housing
ORS 197.296(7)
Compare Needed Density and Mix with Actual Density and Mix
ORS 197.296(7)
Determine Residential Land Sufficiency within the UGB
ORS 197.296(6)
Consider Land Use Efficiency Measures
ORS 197.296(6) and (7)
Designate Lands for Residential Uses
ORS 197.296(6)(a)

Housing Needs Analysis: Preliminary Findings

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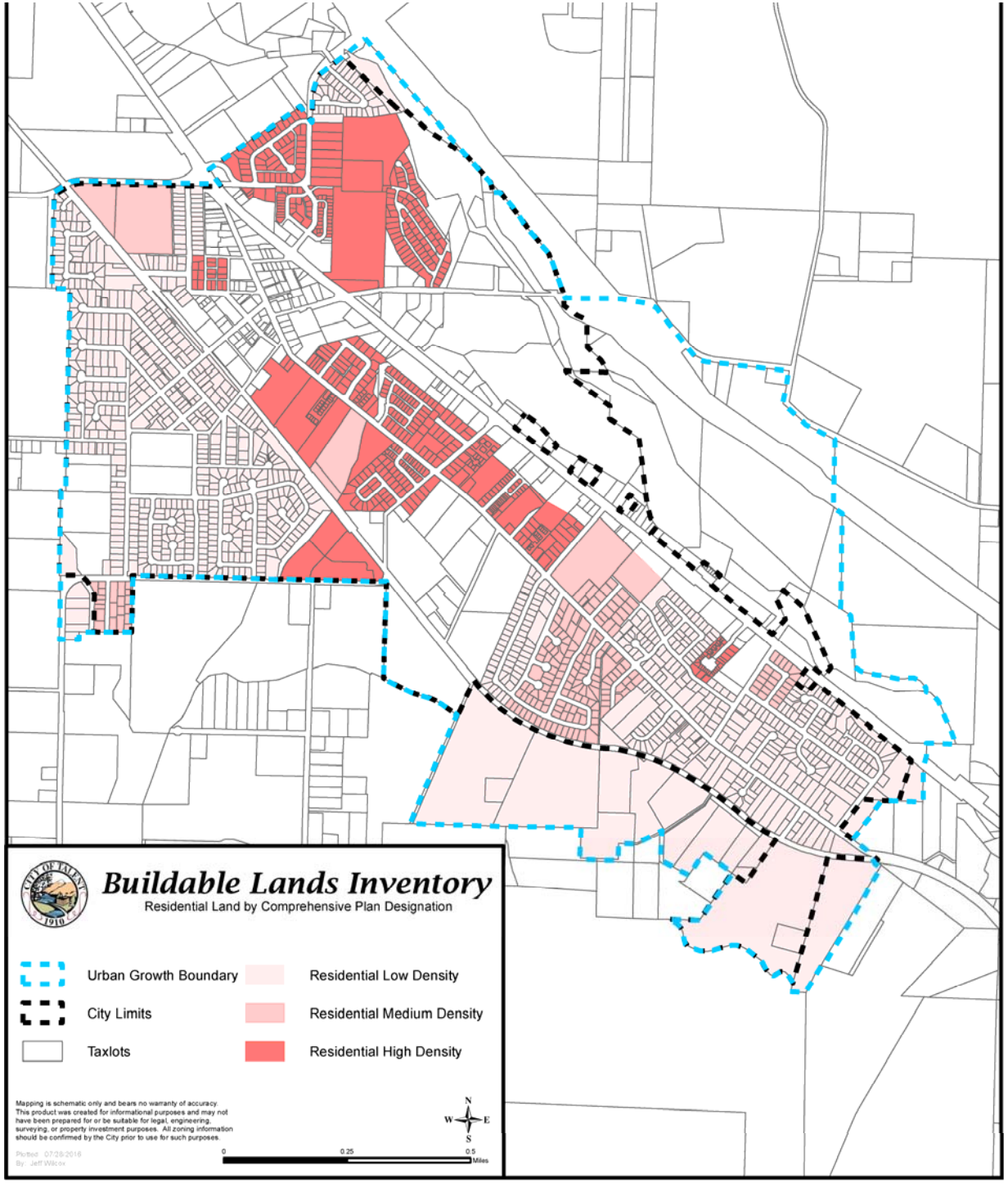
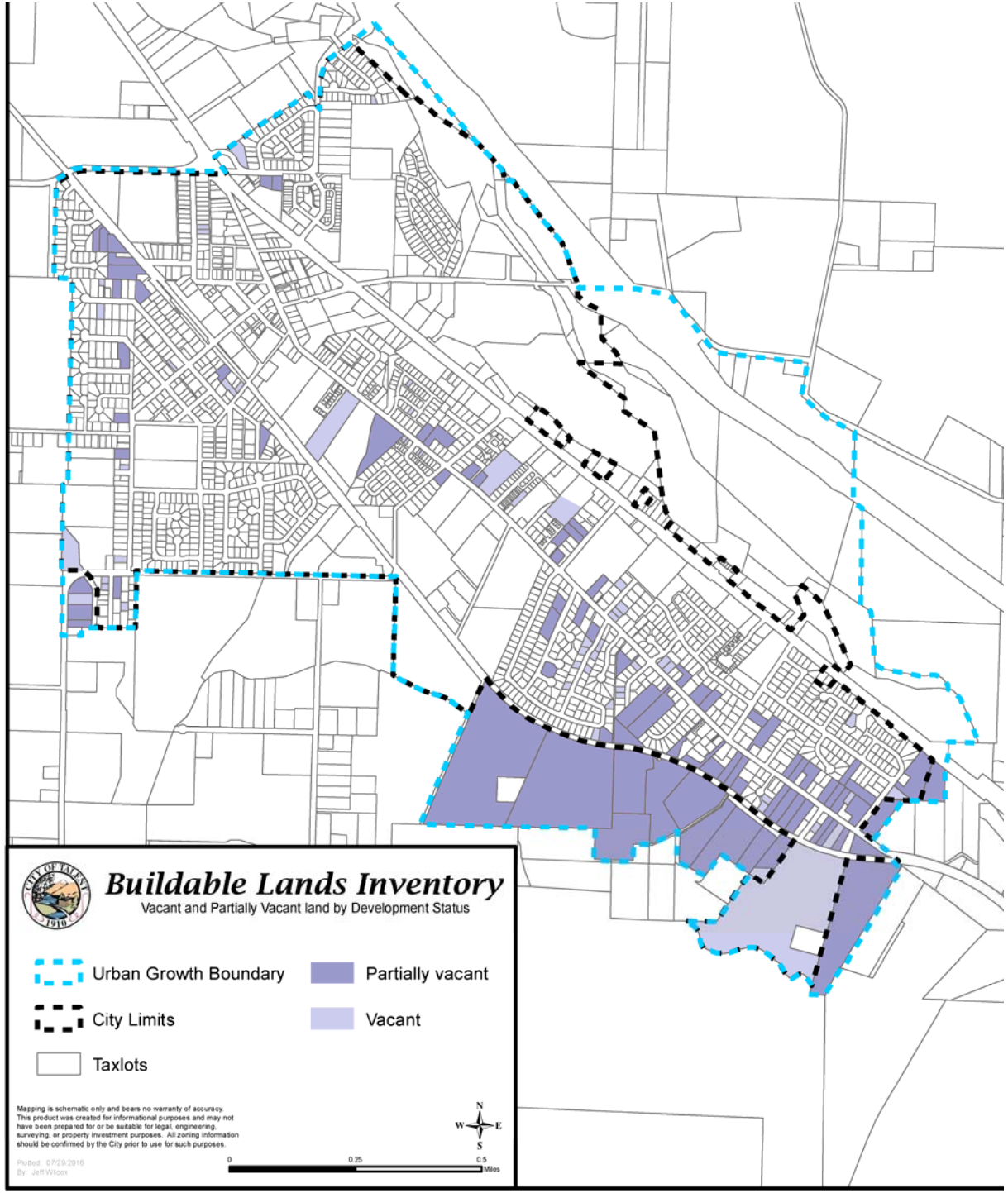
Talent's Residential Land Base

- Residential Low Density
- Residential Medium Density
  - Single-Family Manufactured Housing
- Residential High Density



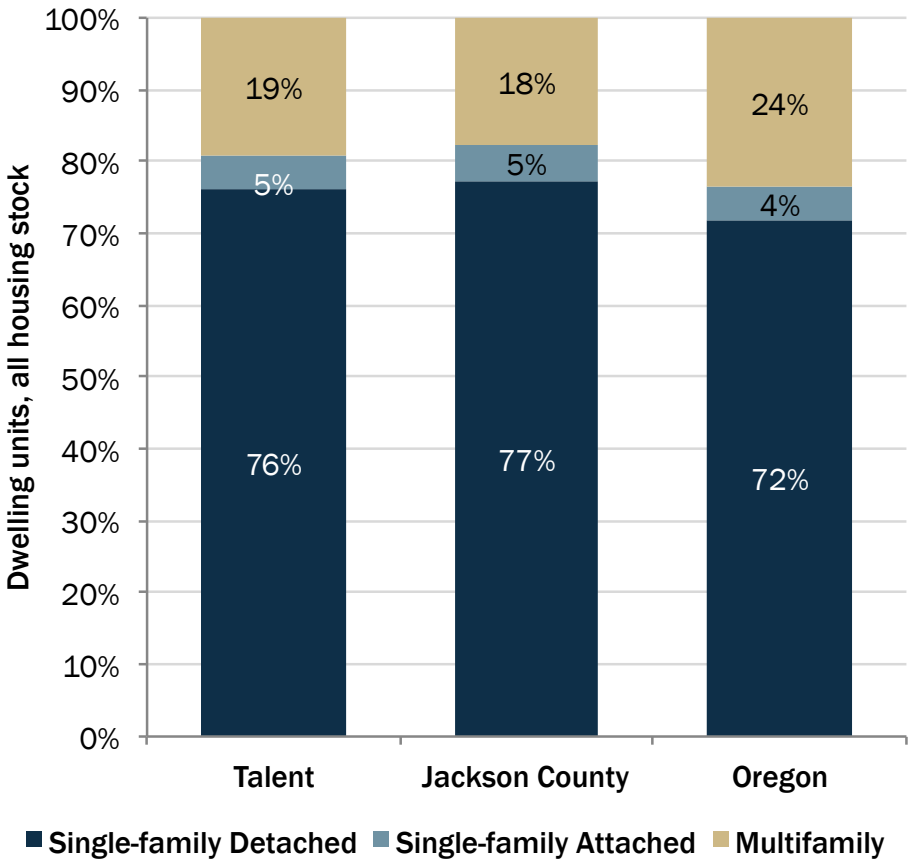
Vacant and Partially Vacant Residential Land

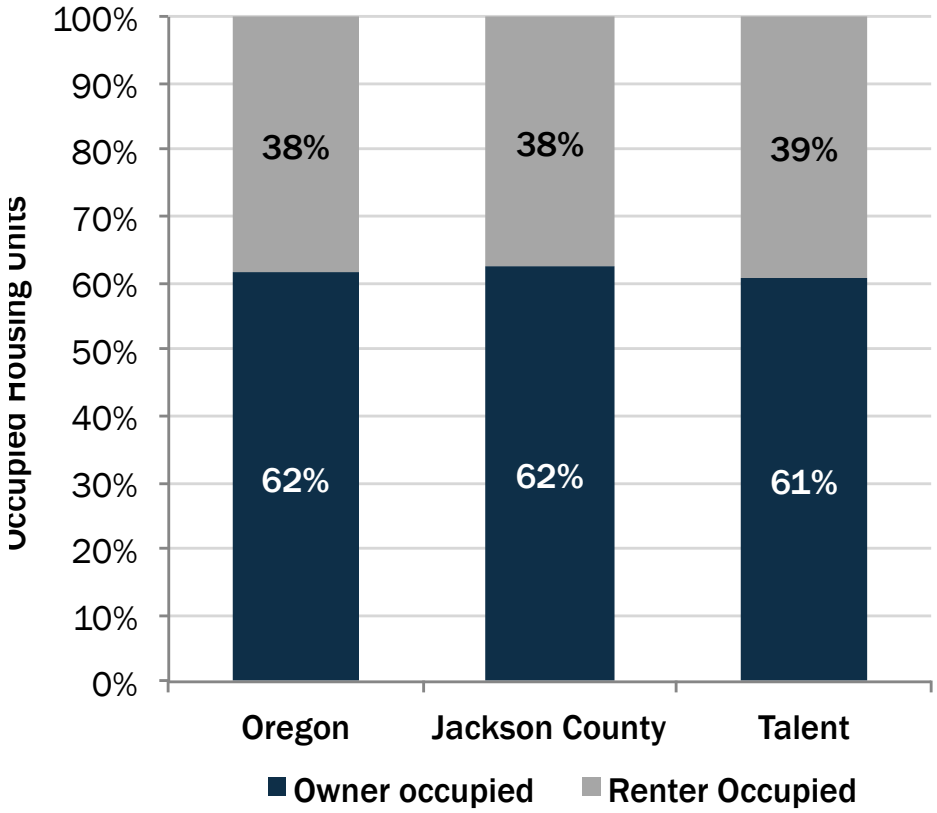
- Res. Low: 112 acres
  - City Limits 43 acres
  - UGB: 69 acres
- Res. Medium: 5 acres
- Res. High: 13 acres



Existing Housing Characteristics

Housing Mix and Tenure

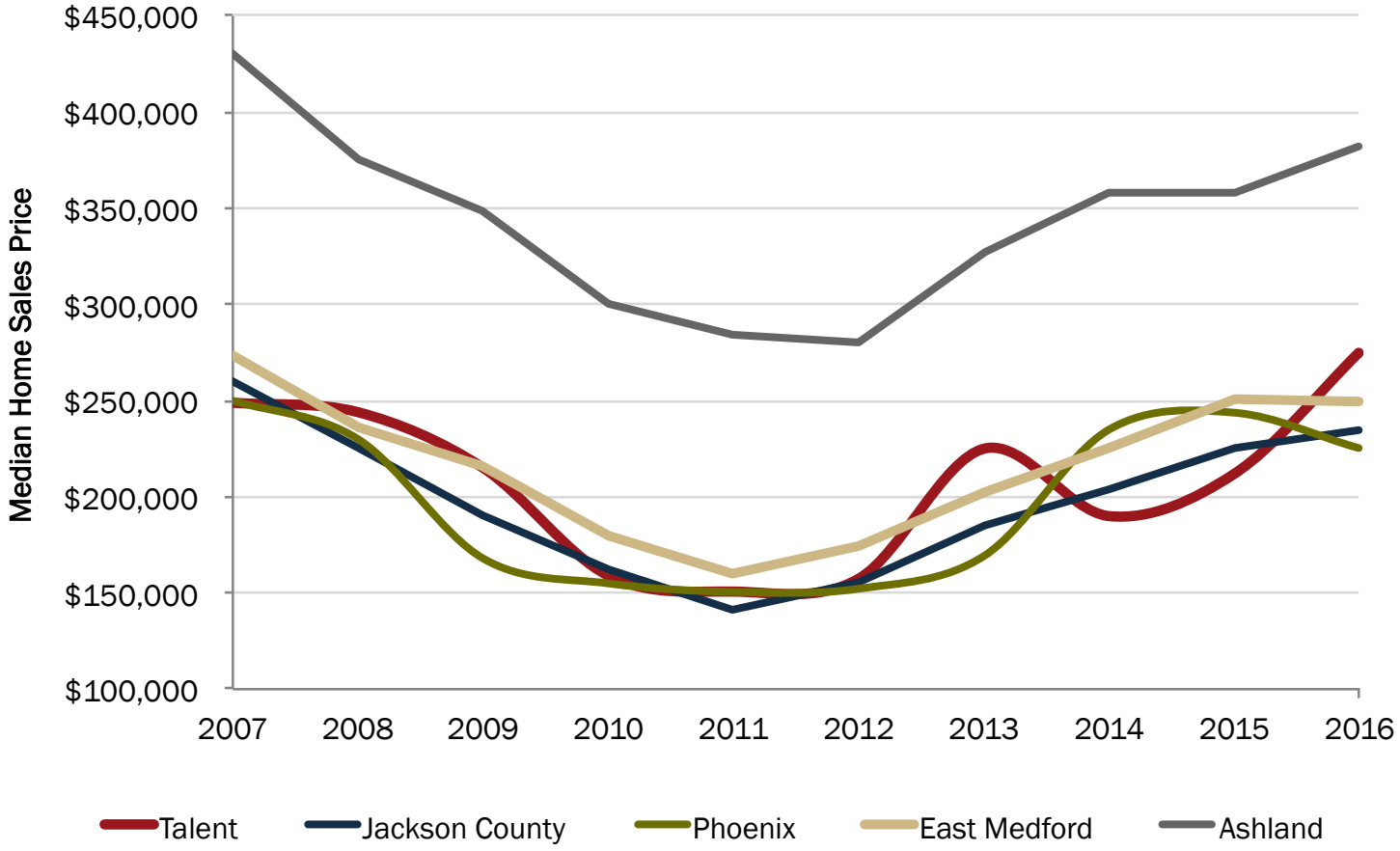




Source: U.S. Census, American Community Survey, 2010-2014

Housing Affordability

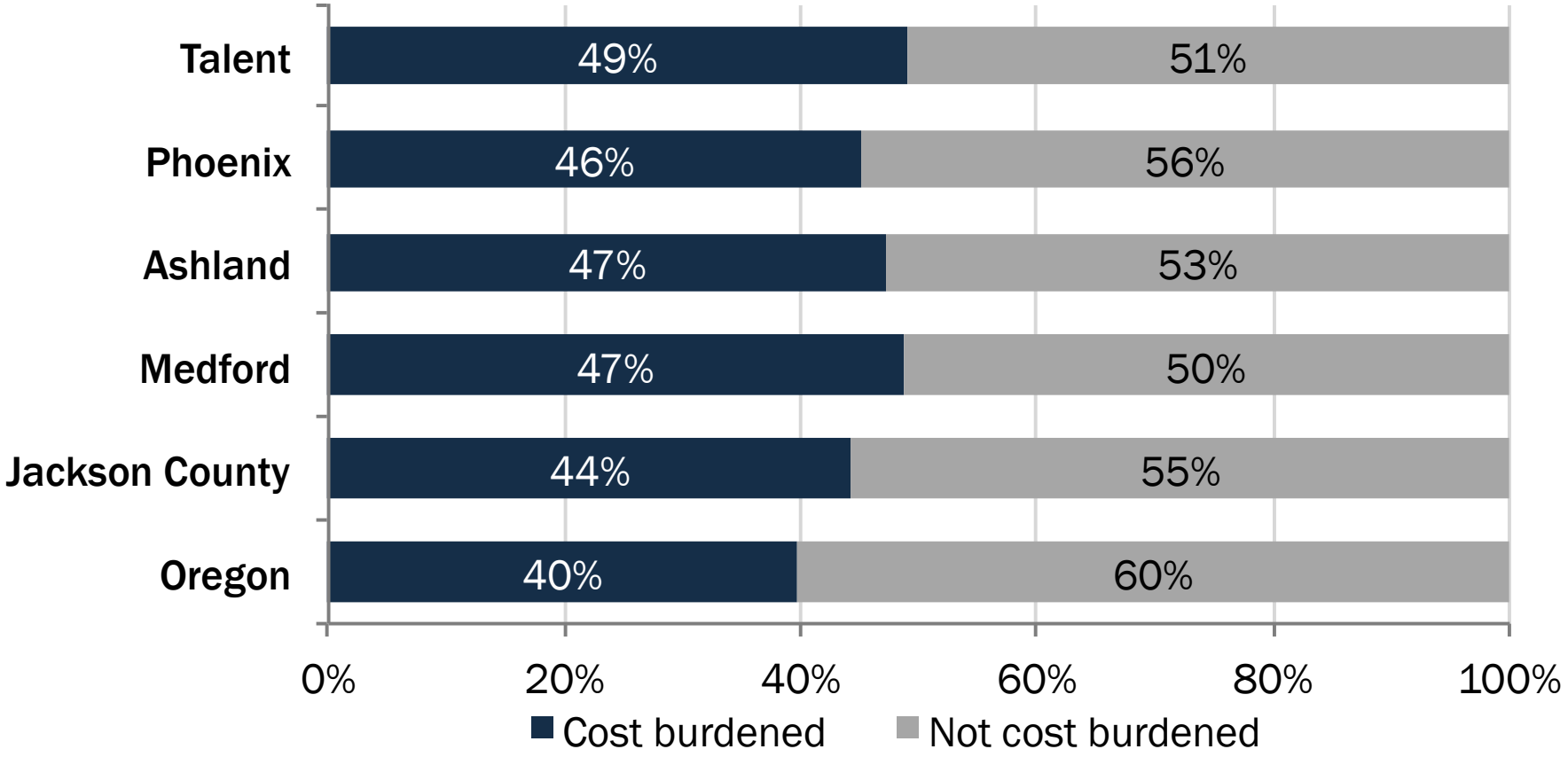
Housing prices are increasing



Source: Rogue Valley Realtors, Median Sales Price for March to May

Housing Affordability

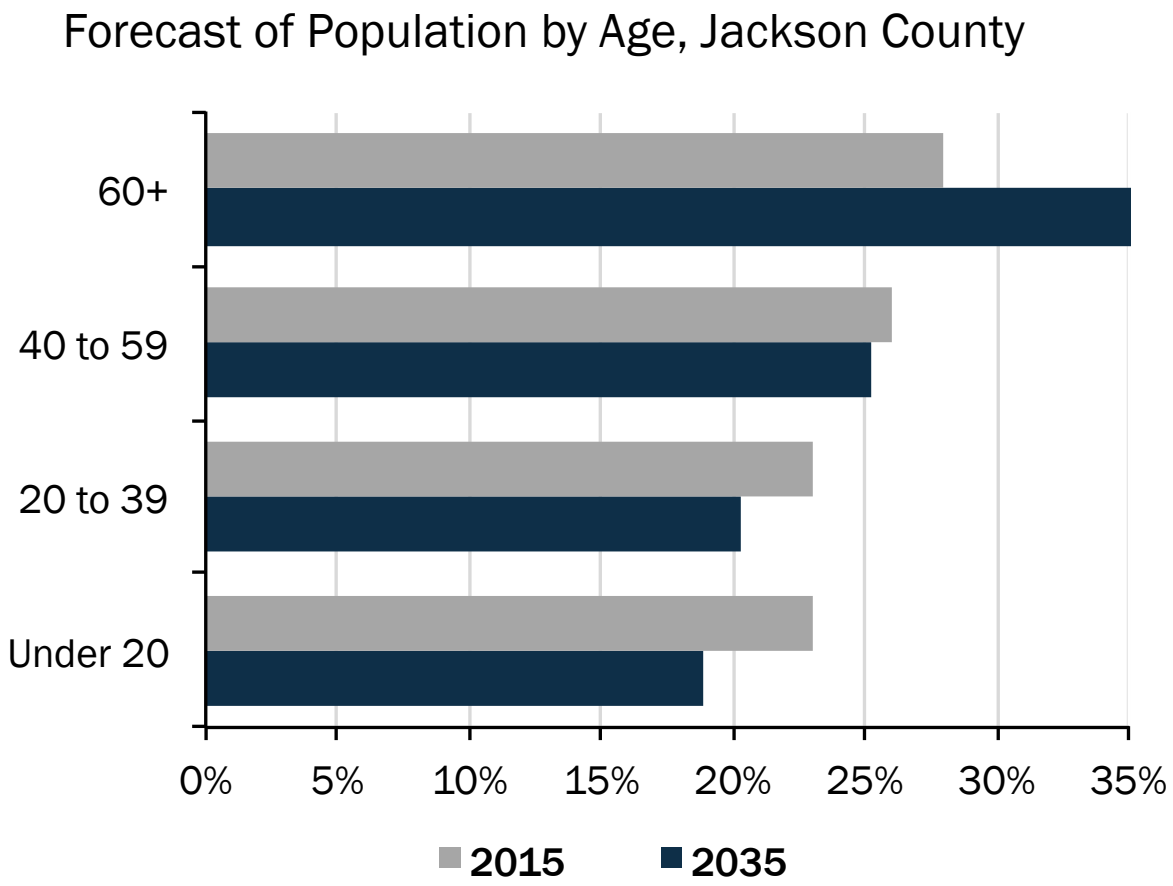
Nearly half of households cannot afford housing



Source: U.S. Census, American Community Survey, 2010-2014

Factors that Will Affect Housing Demand

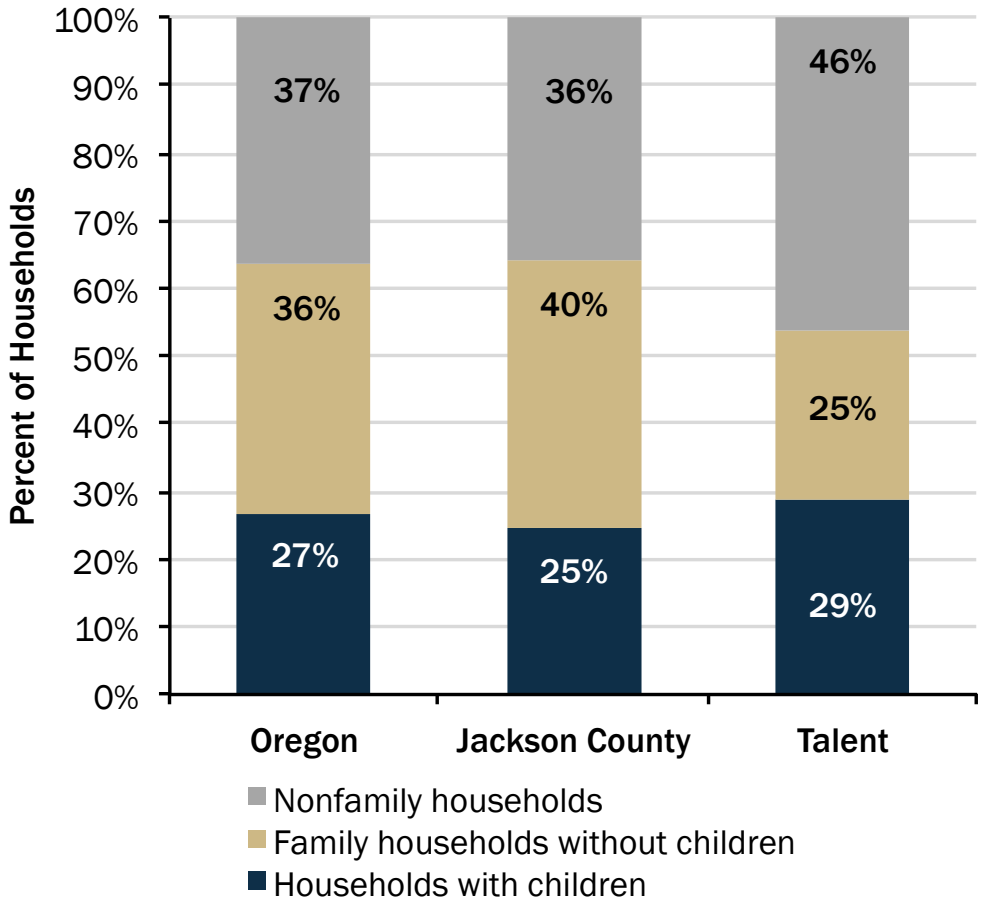
Agein



Source: Population Research Center at PSU, Jackson County Population forecast

Factors that Will Affect Housing Demand

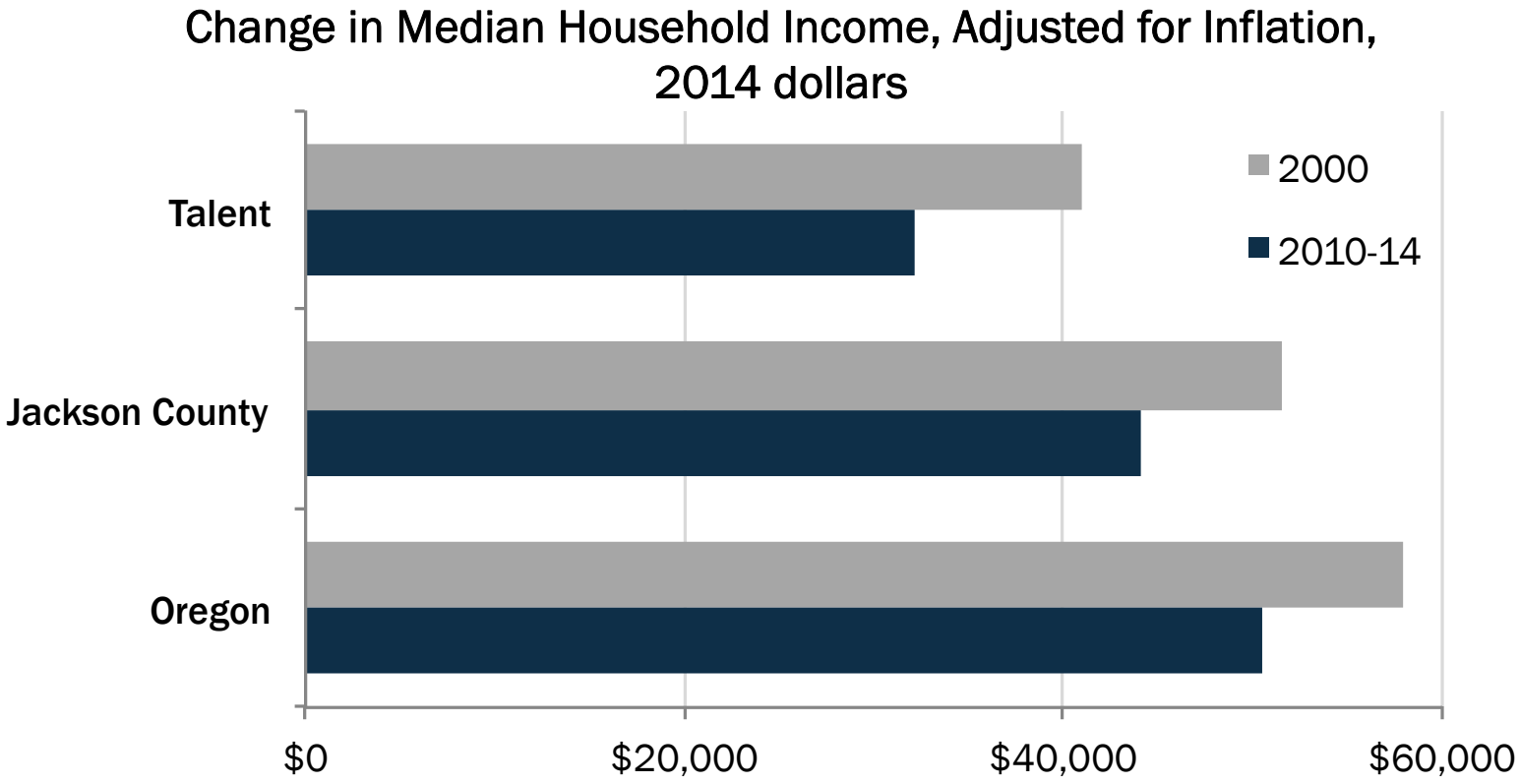
Household



Source: U.S. Census, American Community Survey, 2010-2014

Factors that Will Affect Housing Demand

Changes in Income



Source: U.S. Census, American Community Survey, 2010-2014

Forecast of Housing Growth

- Growth of 2,662 new people will result in demand for 1,247 new dwelling units
- Talent will need a wider variety of housing types

Variable	Mix of New Housing Units (2016-2036)
Needed new dwelling units (2016-2036)	1,247
Dwelling units by structure type	
Single-family detached	
Percent single-family detached DU	65%
equals **Total new single-family detached DU**	810
Single-family attached	
Percent single-family attached DU	10%
equals **Total new single-family attached DU**	125
Multifamily	
Percent multifamily detached DU	25%
Total new multifamily DU	312
equals **Total new dwelling units (2016-2036)**	1,247

Preliminary Conclusions

- Talent has a deficit in all residential Comprehensive Plan Designations
  - Low Density, Residential Manufactured, and High Density
- Talent will need to identify way to accommodate housing growth
  - Examples: Rezone land, increase land use efficiency, expand the UGB

Existing Comprehensive Plan Policies

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Existing Comprehensive Plan Policies

- POLICY 1: Provide for all of talent's housing needs for the twenty year planning period within the existing urban growth boundary.
  - Objective 1.1: Provide for increased residential use within the C-2 zoning district in a way that also promotes business, as described in Policy 4.
  - Objective 1.2: Plan new development, such as streets and other necessary facilities and services in the area west of the railroad in a way that will minimize public costs for growth beyond the twenty-year planning horizon.

Existing Comprehensive Plan Policies

- POLICY 2: Balance the mix of housing types in the city by maintaining opportunities for the development of higher value housing.
  - Objective 2.1: Provide for the development of higher value housing.

Existing Comprehensive Plan Policies

- Policy 3: Maintain and improve low and moderate income housing opportunities in the city while recognizing that talent, currently and in the past, has provided its fair share of such housing when considered on a county-wide basis.
  - Objective 3.1: Continue to provide safe and livable housing for working families, single-earner households, retired people, and students while improving the quality and value of local housing stock.

Existing Comprehensive Plan Policies

- Policy 4: Develop a central downtown area that promotes mixed use, transit-oriented development that is designed to increase housing choices.
  - 4.1.1 Develop design standards for a new “Old Town”/Central Business District Commercial (C-2) “overlay” that will encourage mixed use development and include design standards for transit-oriented, mixed-use development.
  - 4.1.2 Develop new design standards for the Highway District that allows more contemporary architecture, but stresses the importance of appropriate scale, bulk, and context with the “Old Town,” and creates a pedestrian-oriented environment, which is accessible for existing and future residents and businesses in the downtown.

Existing Comprehensive Plan Policies

- Policy 4: Develop a central downtown area that promotes mixed use, transit-oriented development that is designed to increase housing choices.
  - 4.1.3 Apply a creative approach to density in the Central Business District (C-2) commercial zoning designation to allow densities based upon the number of bedrooms to encourage inclusion of studios and one- and two-bedroom units in new residential developments, and/or only limit densities based upon adopted design standards applicable to lot coverage, height, and bulk.

Existing Comprehensive Plan Policies

- Policy 4: Develop a central downtown area that promotes mixed use, transit-oriented development that is designed to increase housing choices.
  - 4.1.4 Flexible spaces are more appropriate given unforeseen market conditions and facilitate the interchange between small business and residential uses. Permit residential uses on the ground floor of new buildings if the space is designed in a way that can easily be converted to commercial use when needed, by including such design features as high minimum ceiling height, street-oriented construction that includes or would permit future installation of display windows, and other features suitable for the size and type of structure proposed.
  - 4.1.5 Encourage applicants to use the PUD application as a strategy to include a variety and mix of housing types in larger developments, which creates a new neighborhood, and not

Existing Comprehensive Plan Policies

- Policy 5: Encourage creative design for residential development that balances the need to optimize infill while protecting scenic and natural resources.
  - Objective 5.1: Promote an attitude toward the land that encourages developers to design projects with consideration of the natural features of the land as amenities rather than as obstacles.

Potential changes to policies

- New zone: Medium Density
  - 8 to 12 dwelling units per acre
  - Allow small lot single-family detached and attached
- New zone: Downtown housing
  - Allow 3-story buildings
- Rezone land for High and Medium Density
  - Commercial land surplus
- Outright allow housing in commercial zones
- Increase densities in existing zones

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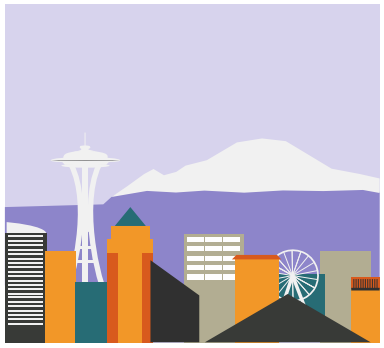
Eugene

Portland



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