

Memorandum

Date: July 13, 2023

To: West Linn Planning Commission

From: Darren Wyss, Planning Manager

Subject: HB2003 Implementation

[HB2003](#), passed by the Oregon Legislature in 2019 in response to the state's housing crisis, requires jurisdictions to update their Housing Capacity Analysis (HCA) and develop an associated Housing Production Strategy. The aim is to help communities meet the housing needs of Oregonians.

The City completed the HCA in 2021 with grant funding from the Department of Land Conservation and Development (DLCD) and with the assistance of the City Council appointed [Project Advisory Committee](#). The primary substance of the HCA is a housing need forecast and a buildable lands inventory. Comparing the two shows the City has enough capacity overall but lacks available land to meet multi-family housing needs (5 acres deficient). The HCA analysis also showed the City was deficient in meeting the minimum residential density allocation for new construction requirements (8 units/acre) of the Metropolitan Housing Rule (OAR 660-007-0035). The work also included recommended Comprehensive Plan Goal 10 amendments to ensure the housing goals and policies of the City were aligned with the findings from the HCA.

The Planning Commission has held two previous work sessions to review HB2003 Implementation materials:

1. [April 5, 2023](#) – Planning Commission reviewed the HCA and proposed Comprehensive Plan Goal 10 amendments.
2. [June 7, 2023](#) – Planning Commission reviewed proposed Comprehensive Plan Goal 10 amendments and the analysis completed by the consultant team for compliance with the Metropolitan Housing Rule.

At its July 19, 2023 meeting, the Planning Commission will hold a final work session before the legislative adoption process begins in August 2023. Here are the topics to review and discuss:

1. Final review of the [HCA](#).
2. Final review of the [proposed Comprehensive Plan Goal 10 amendments](#).
3. DLCD has clarified the City does not need to show compliance with the Metropolitan Housing Rule as the HB2001 legislation has created the opportunity for all residential zones to allow attached housing and increased densities.

4. [Proposed Comprehensive Plan and Zoning Map amendments](#) at 1200 Tamarisk Drive to address the 5-acre deficiency in multi-family zoned land. The proposed Comprehensive Plan Map designation will change from Low-Density Residential to Medium-High Density Residential. The proposed Zoning Map amendment will change from R-10/R-15 to R-2.1.
5. [Proposed Zoning Map amendment](#) to apply R-7 zoning to a residential property annexed in 1998, but never zoned (3637/3939 Parker Road). The property has an existing Comprehensive Plan Map designation of Low-Density Residential, which aligns with R-7 zoning.
6. [Proposed Zoning Map amendments](#) to apply R-4.5 zoning to two properties (4100 Norfolk Street/4192 Sussex Street) to align the zoning with the existing Comprehensive Plan Map designation of Medium-Density Residential.

You will find the HCA, proposed Comprehensive Plan Goal 10 amendments, and the proposed map amendments attached. Staff has tentatively scheduled the Planning Commission legislative public hearing for August 16, 2023. If the Planning Commission needs an additional work session before the public hearing, August 2, 2023 is available.

If you have questions about the meeting or materials, please feel free to email or call me at dwys@westlinnoregon.gov or 503-742-6064. As always, please submit questions before the meeting to increase the efficiency and effectiveness of the discussion as it allows staff to prepare materials and distribute them for your consideration. Thanks, and hope to see everyone at the meeting.



CITY OF WEST LINN, OR

**HOUSING CAPACITY ANALYSIS
(OREGON STATEWIDE PLANNING GOAL 10)**

**20-YEAR HOUSING NEED
2020 - 2040**

June 2021



Acknowledgments

Johnson Economics prepared this report for the City of West Linn. Johnson Economics and the City of West Linn thank the many people who helped to develop this document.

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I. INTRODUCTION

This analysis outlines a forecast of housing need within the City of West Linn. Housing need and resulting land need are forecast to 2040 consistent with 20-year need assessment requirements of Oregon Revised Statutes.¹ This report presents a housing need analysis (presented in number and types of housing units) and a residential land need analysis, based on those projections.

The primary data sources used in generating this forecast were:

- Portland State University Population Research Center
- Metro
- U.S. Census
- Environics Analytics Inc.²
- Oregon Employment Department
- City of West Linn
- Clackamas County
- Other sources are identified as appropriate.

This analysis relies heavily on Census data from both the Decennial Census, and the American Community Survey (ACS). Generally, data from the ACS has a larger statistical margin of error than the 10-year Census. This analysis relies whenever possible on the most recent ACS 5-year estimates. The 5-year estimates have the lowest margin of error in comparison to the ACS 3-year and 1-year estimates. All Census data feature some margin of error but remain the best source of data available on many demographic and housing subjects.

II. CITY OF WEST LINN DEMOGRAPHIC PROFILE

SUMMARY

The following table (Figure 2.1) presents a profile of City of West Linn demographics from the 2000 and 2010 Census. It also reflects the estimated population of this area as of 2019 from PSU estimates, forecasted forward to 2020 using the growth rate since 2010.

- West Linn is a City of nearly 26,000 people located in Clackamas County on the southern edge of the Portland metropolitan area.
- Based on estimated population, West Linn is the 20th largest city in the state by population, similar in size to other regional cities such as Tualatin, Wilsonville, and Frost Grove. West Linn has about 75% of the population of neighboring Oregon City.
- West Linn has grown by over 3,700 people since 2000 or 17%. In contrast, Clackamas County and the state experienced population growth of 25% and 24% respectively. (US Census and PSU Population Research Center)
- West Linn was home to an estimated 9,948 households in 2020, an increase of roughly 2,200 households since 2000. The percentage of families has remained steady since 2000, at near 76% of all households. The city has a larger share of family households than Clackamas County (69%) and the state (63%). Average household size is estimated to have fallen during this period and is similar to the county average.

¹ ORS 197.628; OAR 660-025

² Environics Analytics Inc. is a third-party company providing data on demographics and market segmentation. It licenses data from the Nielson Company which conducts direct market research including surveying of households across the nation. Nielson combines proprietary data with data from the U.S. Census, Postal Service, and other federal sources, as well as local-level sources such as Equifax, Vallassis and the National Association of Realtors. Projections of future growth by demographic segments are based on the continuation of long-term and emergent demographic trends identified through the above sources.

- West Linn’s estimated average household size is 2.6 persons, equal to that of Clackamas County and slightly higher than the statewide average of 2.5.

FIGURE 2.1: WEST LINN DEMOGRAPHIC PROFILE

POPULATION, HOUSEHOLDS, FAMILIES, AND YEAR-ROUND HOUSING UNITS					
	2000	2010	Growth	2020	Growth
	(Census)	(Census)	00-10	(PSU)	10-20
Population ¹	22,261	25,109	13%	25,995	4%
Households ²	7,745	9,523	23%	9,948	4%
Families ³	5,954	7,081	19%	7,580	7%
Housing Units ⁴	8,697	10,035	15%	10,476	4%
Group Quarters Population ⁵	92	127	100%	131	4%
<i>Household Size (non-group)</i>	2.72	2.62	-4%	2.60	-1%
<i>Avg. Family Size</i>	3.11	3.02	-3%	2.99	-1%
PER CAPITA AND MEDIAN HOUSEHOLD INCOME					
	2000	2010	Growth	2020	Growth
	(Census)	(Census)	00-10	(Proj.)	10-20
Per Capita (\$)	na	\$41,319	na	\$51,969	26%
Median HH (\$)	na	\$86,611	na	\$104,061	20%

SOURCE: Census, PSU Population Research Center, and Johnson Economics

Census Tables: DP-1 (2000, 2010); DP-3 (2000); S1901; S19301

1 From PSU Population Research Center, growth rate 2000-2019 extended to 2020

2 2020 Households = (2020 population - Group Quarters Population)/2020 HH Size

3 Ratio of 2020 Families to total HH is based on 2018 ACS 5-year Estimates

4 2020 housing units are the '10 Census total plus new units permitted from '10 through '20 (source: Census, City)

5 Ratio of 2020 Group Quarters Population to Total Population is kept constant from 2010.

A. POPULATION GROWTH

Since 2000, West Linn has grown by over 3,700 people within the UGB, or 17% in 20 years. This was lower than the countywide rate of growth. Clackamas County as a whole has grown an estimated 25% since 2000, while other cities in the county such as Oregon City and Happy Valley grew by 38% and 400% respectively. Portland’s population also grew by an estimated 17% during this period (PSU Population Research Center).

B. HOUSEHOLD GROWTH & SIZE

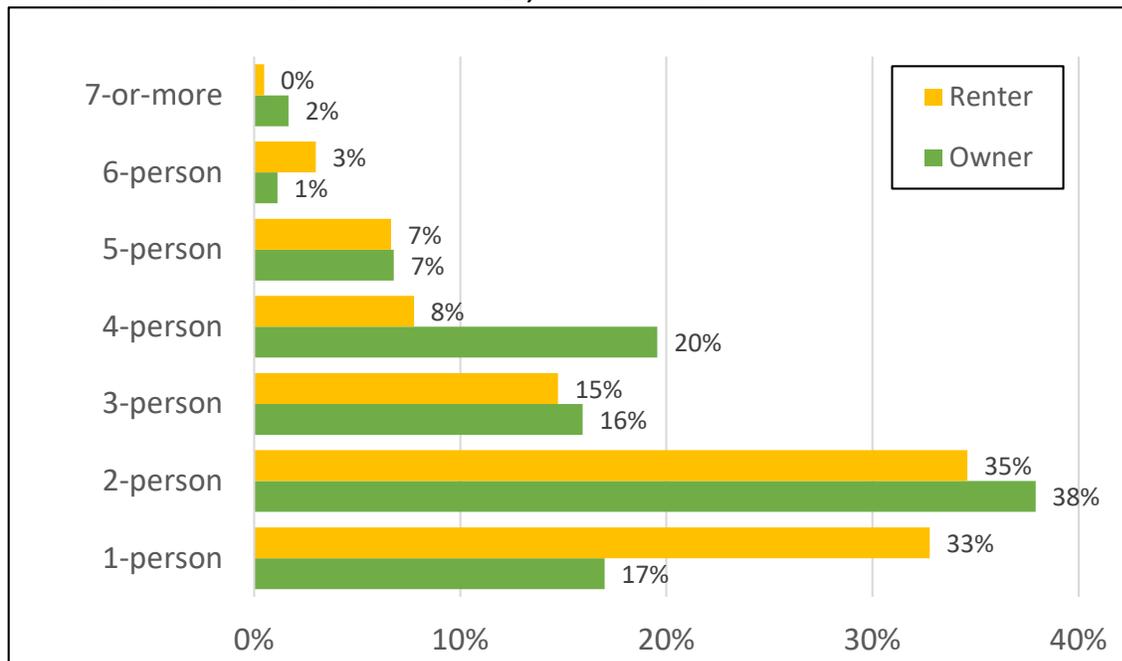
As of 2020, the city has an estimated 9,948 households. Since 2000, West Linn has added an estimated 2,200 households. This is an average of roughly 110 households annually during this period. The growth since 2000 has outpaced the growth in new housing units, which have been permitted at the rate of roughly 90 units per year.

There has been a general trend in Oregon and nationwide towards declining household size as birth rates have fallen, more people have chosen to live alone, and the Baby Boomers have become empty nesters. While this trend of diminishing household size is expected to continue nationwide, there are limits to how far the average can fall.

West Linn’s average household size of 2.6 people is similar to the Clackamas County average.

Figure 2.2 shows the share of households by the number of people for renter and owner households in 2018 (latest data available), according to the Census. Renter households are more likely to have two or fewer persons. Owner households are more likely to have larger households. Household size correlates to housing needs.

FIGURE 2.2: NUMBER OF PEOPLE PER HOUSEHOLD, CITY OF WEST LINN



SOURCE: US Census, JOHNSON ECONOMICS LLC
 Census Tables: B25009 (2018 ACS 5-yr Estimates)

C. FAMILY HOUSEHOLDS

As of the 2010 Census, 76% of West Linn households were family households, roughly the same as 2000. The total number of family households in West Linn is estimated to have grown by over 1,600 since 2000. The Census defines family households as two or more persons, related by marriage, birth or adoption and living together. In 2020, family households in West Linn had an average size of 3.0 people.

D. GROUP QUARTERS POPULATION

The City of West Linn has an estimated group quarters population of 0.5% of the total population, or 131 persons. Group quarters include such shared housing situations as nursing homes, prisons, dorms, group residences, military housing, or shelters. For the purposes of this analysis, these residents are removed from the estimated population total, before determining the amount of other types of housing that are needed for non-group households. (The share of group quarters population is assumed to remain steady over the 20-year forecast period.)

E. HOUSING UNITS

Data from the City of West Linn and the US Census indicate that the city added roughly 1,780 new housing units since 2000, representing 21% growth in the housing stock. This number of new units is somewhat lower than the growth in new households estimated during the same period, indicating that housing growth has not kept pace with growing need.

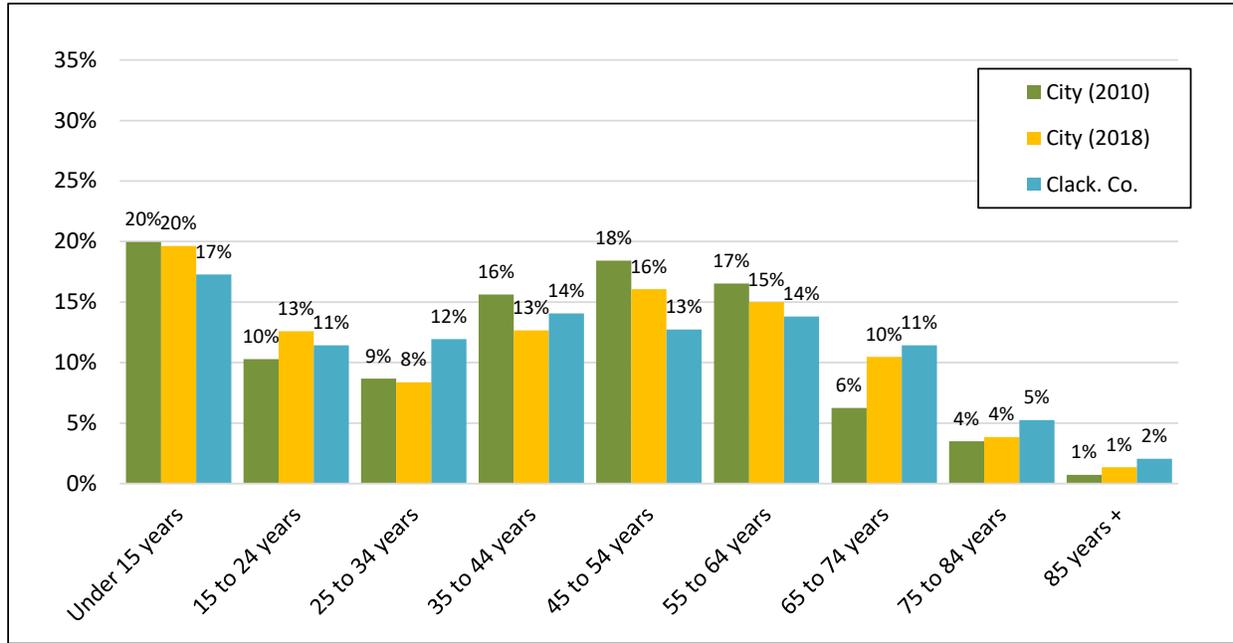
As of 2020, the city had an estimated housing stock of roughly 10,475 units for its 9,948 estimated households. This translates to an estimated average vacancy rate of 5%.

Residential Permits: An average of 90 units have been permitted annually since 2000, with under 12% being multi-family units. Few multi-family housing units have been built in West Linn in the last decade.

F. AGE TRENDS

The following figure shows the share of the population falling in different age cohorts between the 2010 Census and the most recent 5-year American Community Survey estimates. As the chart shows, there is a general trend for middle age cohorts to fall as share of total population, while older cohorts have grown in share. This is in keeping with the national trend caused by the aging of the Baby Boom generation. Overall, West Linn has a younger population than the county, with a greater share of children, but a smaller share of those aged 25 to 34 years.

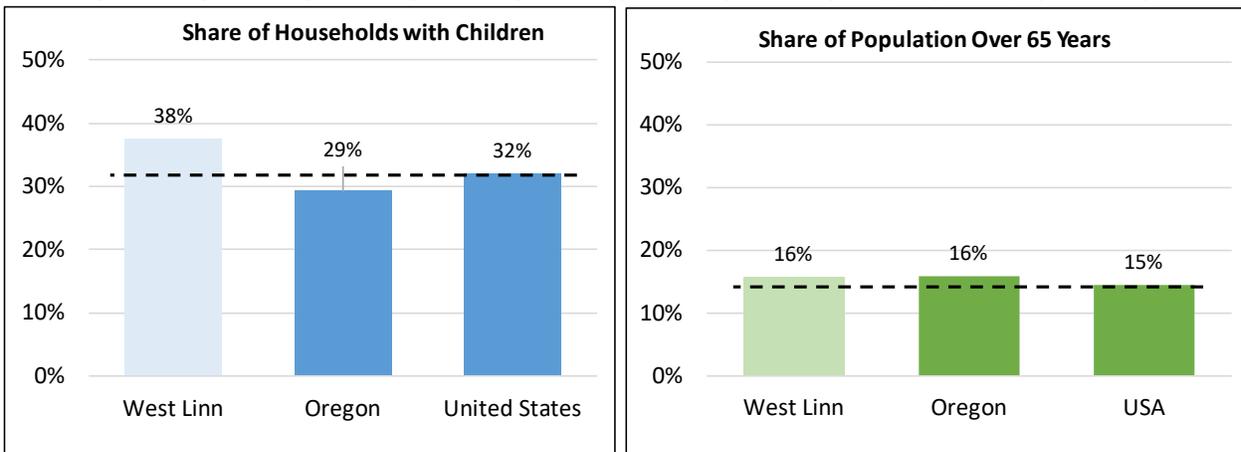
FIGURE 2.3: AGE COHORT TRENDS, 2000 - 2018



SOURCE: US Census, JOHNSON ECONOMICS LLC
 Census Tables: QT-P1 (2000); S0101 (2018 ACS 5-yr Estimates)

- The cohort which grew the most in share during this period were those aged 65 to 74 years. Still, an estimated 85% of the population is under 65 years of age.
- In the 2018 ACS, the local median age was an estimated 42 years, compared to 38 years in Oregon.

FIGURE 2.4: SHARE OF HOUSEHOLDS WITH CHILDREN/ POPULATION OVER 65 YEARS (WEST LINN)



SOURCE: US Census, JOHNSON ECONOMICS LLC
 Census Tables: B11005; S0101 (2018 ACS 5-yr Estimates)

Figure 2.4 presents the share of households with children, and the share of population over 65 years for comparison. Compared to state and national averages, West Linn has a higher share of households with children. At 16%, the share of population over 65 is similar to the state and national figures.

G. INCOME TRENDS

The following figure presents data on West Linn’s income trends. (2000 Census data on income is not available for West Linn.)

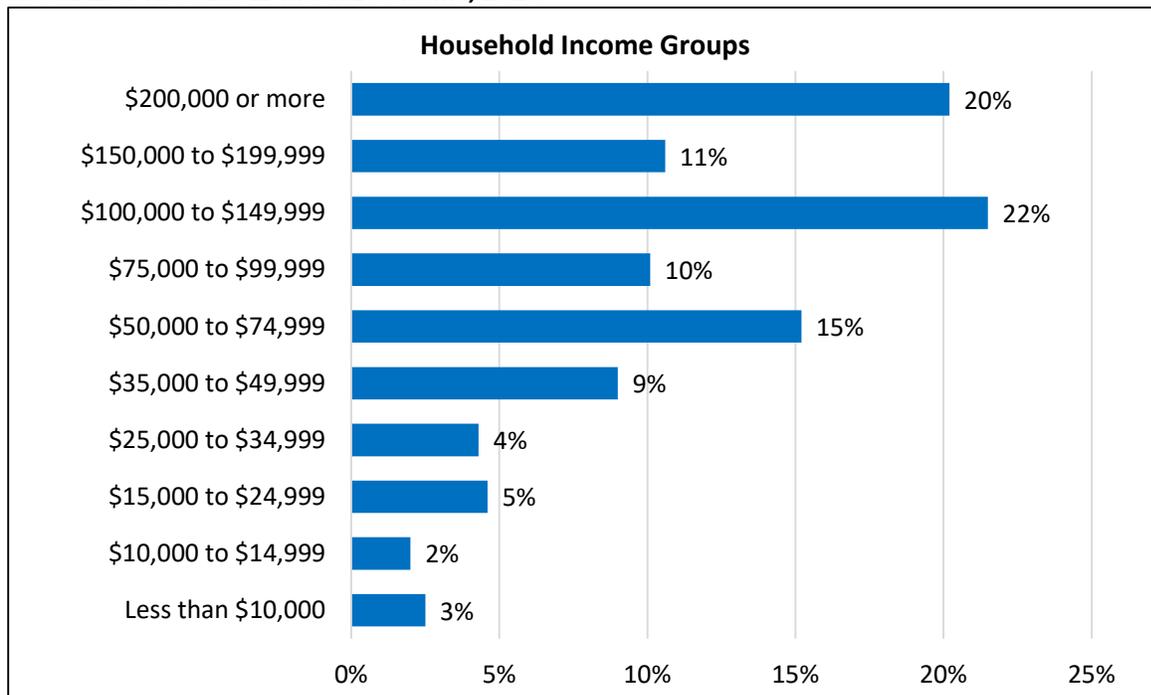
FIGURE 2.5: INCOME TRENDS, 2000 – 2020

PER CAPITA AND MEDIAN HOUSEHOLD INCOME					
	2000	2010	Growth	2020	Growth
	(Census)	(Census)	00-10	(Proj.)	10-20
Per Capita (\$)	na	\$41,319	na	\$51,969	26%
Median HH (\$)	na	\$86,611	na	\$104,061	20%

SOURCE: Census, PSU Population Research Center, and Johnson Economics
 Census Tables: DP-1 (2000, 2010); DP-3 (2000); S1901; S19301

- West Linn’s estimated median household income was \$105,000 in 2020. This is 30% higher than the Clackamas County median of \$80,500, and almost double the statewide median of \$56,000.
- West Linn’s per capita income is roughly \$52,000.
- Median income has grown an estimated 20% between 2010 and 2019, in real dollars. Inflation was an estimated 18% over this period, so the local median income has exceeded inflation. This is not the case in many regions and nationally, where income growth has not kept pace with inflation.

FIGURE 2.6: HOUSEHOLD INCOME COHORTS, 2018



SOURCE: US Census, Census Tables: S1901 (2018 ACS 5-yr Est.)

Figure 2.6 presents the estimated distribution of households by income as of 2018. The largest income cohorts are those households earning between \$100k and \$150k, followed by households earning over \$200k. Fifty-three percent of households earn more than \$100,000.

- Only 23% of households earn less than \$50k per year, while 77% of households earn \$50k or more.
- Only 10% of households earn less than \$25k per year.

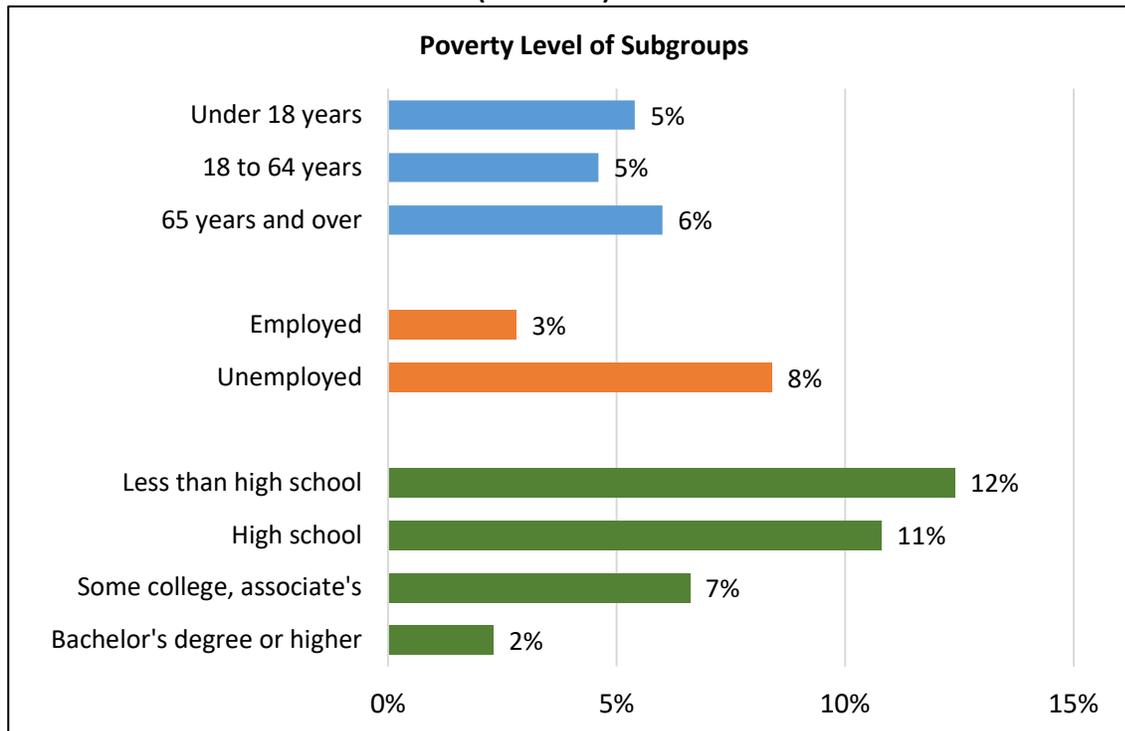
H. POVERTY STATISTICS

According to the US Census, the official poverty rate in West Linn is an estimated 5% over the most recent period reported (2018 5-year estimates).³ This is roughly 1,330 individuals in West Linn. In comparison, the official poverty rate in Clackamas County is 9%, and at the state level is 17%. In the 2014-18 period:

- The West Linn poverty rate is low among all groups, but highest among those over 65 years of age at 6%. The rate is 5% among those under 65 years of age.
- For those with only a high school diploma, the poverty rate is 11%.
- Among those who are employed the poverty rate is 3%, while it is 8% for those who are unemployed.

Information on affordable housing is presented in Section II F of this report.

FIGURE 2.7: POVERTY STATUS BY CATEGORY (WEST LINN)



SOURCE: US Census
Census Tables: S1701 (2018 ACS 5-yr Est.)

³ Census Tables: S1701 (2018 ACS 5-yr Estimates)

I. EMPLOYMENT LOCATION TRENDS

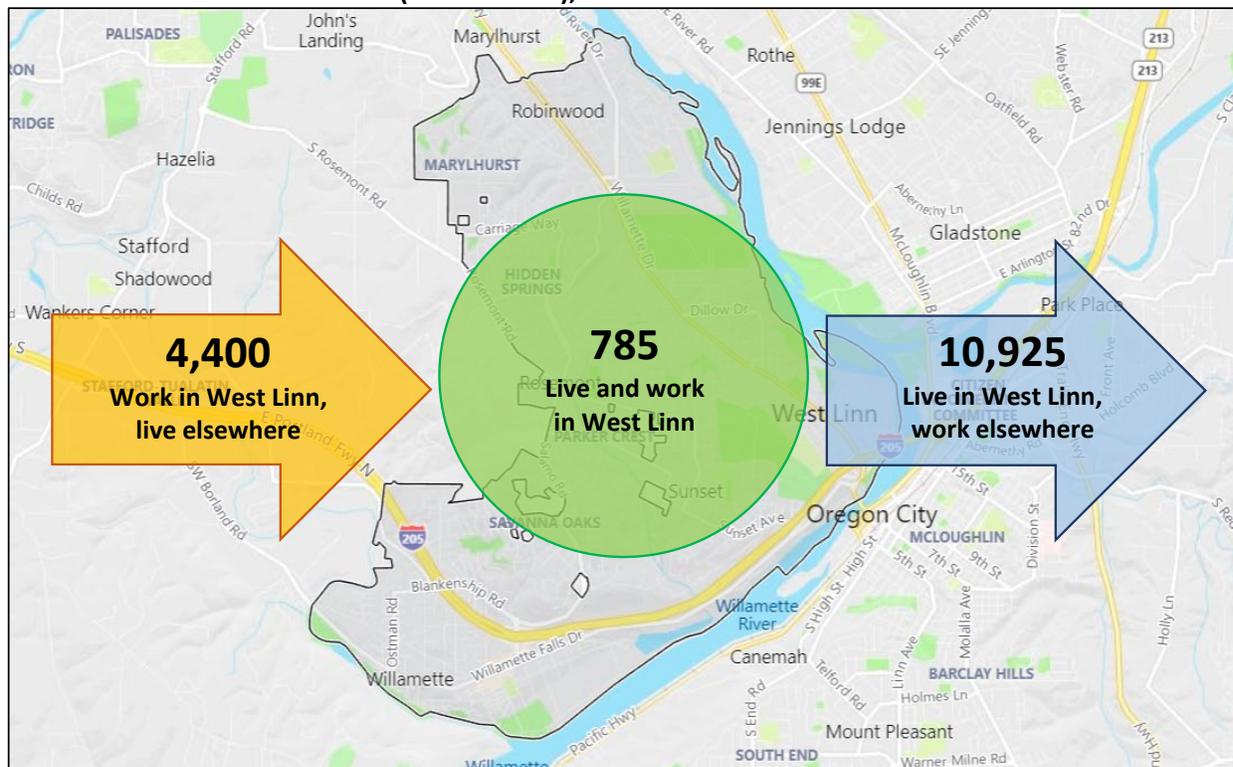
This section provides an overview of employment and industry trends in West Linn that are related to housing.

Commuting Patterns: The following figure shows the inflow and outflow of commuters to West Linn according to the Census Employment Dynamics Database. These figures reflect “covered employment” as of 2017, the most recent year available. (Covered employment refers to those jobs where the employee is covered by federal unemployment insurance.) This category does not include many contract employees and self-employed and therefore is not a complete picture of local employment. The figure discussed here is best understood as indicators of the general pattern of commuting and not exact figures.

As of 2017, the most recent year available, the Census estimated there were roughly 5,185 covered employment jobs located in West Linn. Of these, an estimated 785 or 15%, are held by local residents, while over 4,400 employees commute into the city from elsewhere. This general pattern is fairly common among many communities in the Metro area. The most common homes of local workers commuting into the city are Portland or Oregon City.

Similarly, of the estimated 11,700 employed West Linn residents, 93% of them commute elsewhere to their employment. The most common destinations for West Linn commuters are Portland, Lake Oswego and Beaverton. Smaller shares work elsewhere in the Portland metro or in the mid-Willamette Valley.

FIGURE 2.8: COMMUTING PATTERNS (PRIMARY JOBS), WEST LINN



Source: US Census Longitudinal Employer-Household Dynamics

Jobs/Household Ratio: West Linn features a fairly low jobs-to-households ratio. There are an estimated 5,185 jobs in the city of West Linn (covered), and an estimated 9,948 households in West Linn. This represents 0.5 jobs per household. There is no standard jobs-to-households ratio that is right for all communities, but it can provide a guide to the balance between employment uses and residential uses in the city.

There is an average of 1.2 jobs held for each West Linn households, a majority of which are located outside the city.

III. CURRENT HOUSING CONDITIONS

This section presents a profile of the current housing stock and market indicators in West Linn. This profile forms the foundation to which current and future housing needs will be compared.

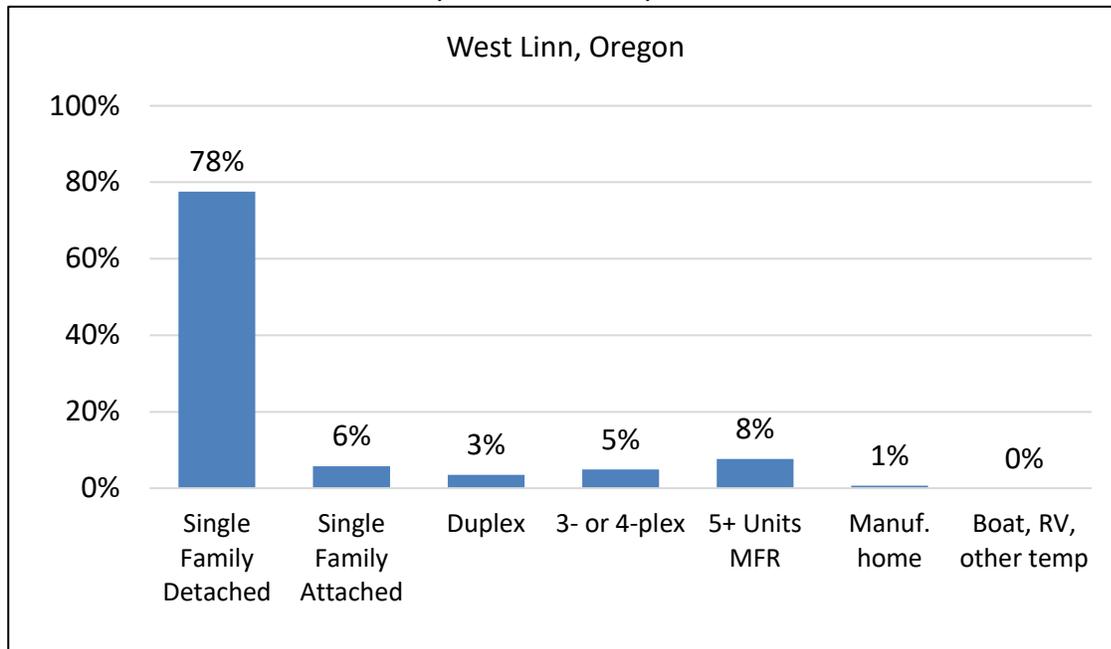
A. HOUSING TENURE

West Linn has a much greater share of homeowner households than renter households. The 2018 American Community Survey estimates that 79% of occupied units were owner occupied, and only 21% renter occupied. The ownership rate has held steady since 2000 (78%). This is significantly higher than the estimated ownership rate across Clackamas County (69%) and statewide (61%).

B. HOUSING STOCK

As shown in Figure 2.1, West Linn had an estimated 10,476 housing units in 2020, with a vacancy rate of 5% (includes ownership and rental units). The housing stock has increased by roughly 1,779 units since 2000, or growth of over 20%.

FIGURE 3.1: ESTIMATED SHARE OF UNITS, BY PROPERTY TYPE, 2018



SOURCE: US Census, City of West Linn

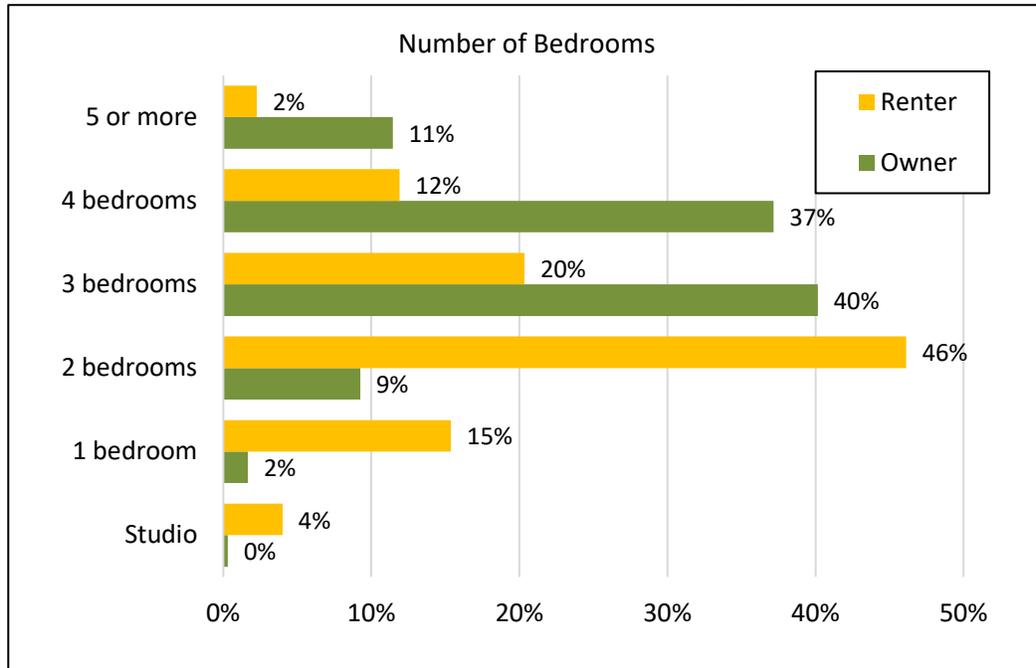
Figure 3.1 shows the estimated number of units by type in 2020 based on US Census. Detached single-family homes represent an estimated 78% of housing units.

Units in larger apartment complexes of 5 or more units represent only 8% of units, and other types of attached homes represent 14% of units. (Attached single family generally includes townhomes, and some 2 to 4-plexes which are separately metered.) Manufactured homes represent less than 1% of the inventory.

C. NUMBER OF BEDROOMS

Figure 3.2 shows the share of units for owners and renters by the number of bedrooms they have. In general, owner-occupied units are much more likely to have three or more bedrooms, while renter-occupied units are much more likely to have two or fewer bedrooms.

FIGURE 3.2: NUMBER OF BEDROOMS FOR OWNER AND RENTER UNITS, 2018



SOURCE: US Census
Census Tables: B25042 (2018 ACS 5-year Estimates)

D. UNIT TYPES BY TENURE

As Figure 3.3 and 3.4 show, a large share of owner-occupied units (90%) are detached homes, which is related to why owner-occupied units tend to have more bedrooms. Renter-occupied units are much more distributed among a range of structure types. About 32% of rented units are estimated to be detached homes or manufactured homes, while the remainder are some form of attached unit. An estimated 29% of rental units are in larger apartment complexes.

FIGURE 3.3: CURRENT INVENTORY BY UNIT TYPE, FOR OWNERSHIP AND RENTAL HOUSING

OWNERSHIP HOUSING

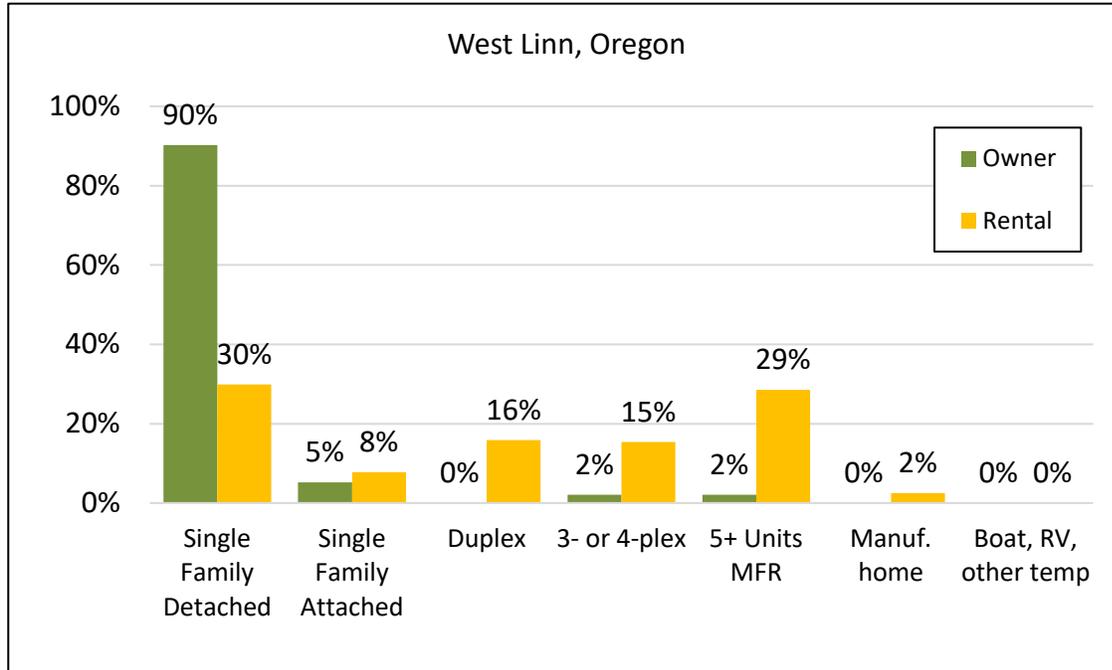
OWNERSHIP HOUSING								
	Single Family Detached	Single Family Attached	Duplex	3- or 4-plex	5+ Units MFR	Manuf. home	Boat, RV, other temp	Total Units
Totals:	7,460	432	13	175	170	14	0	8,264
Percentage:	90.3%	5.2%	0.2%	2.1%	2.1%	0.2%	0.0%	100%

RENTAL HOUSING

RENTAL HOUSING								
	Single Family Detached	Single Family Attached	Duplex	3- or 4-plex	5+ Units MFR	Manuf. home	Boat, RV, other temp	Total Units
Totals:	662	172	352	341	631	54	0	2,212
Percentage:	29.9%	7.8%	15.9%	15.4%	28.5%	2.5%	0.0%	100%

Sources: US Census, JOHNSON ECONOMICS, CITY OF WEST LINN

FIGURE 3.4: CURRENT INVENTORY BY UNIT TYPE, BY TENURE

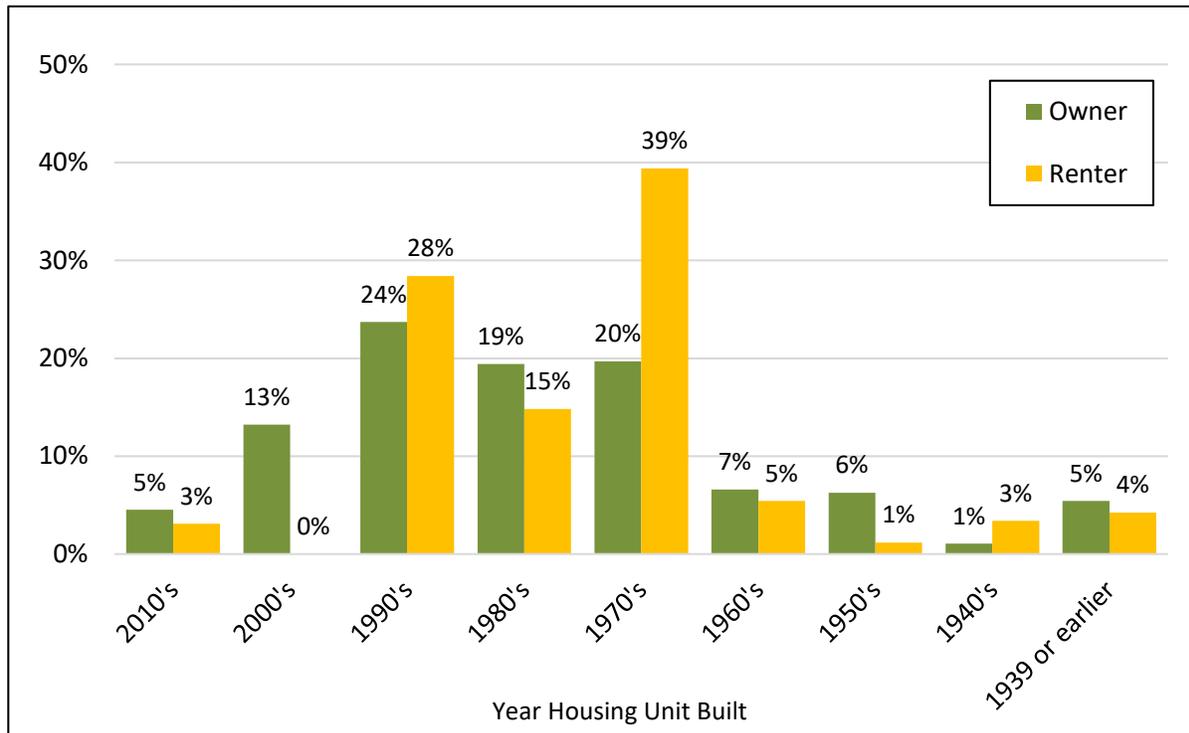


Sources: US Census, JOHNSON ECONOMICS, CITY OF WEST LINN

E. AGE AND CONDITION OF HOUSING STOCK

West Linn’s housing stock reflects the pattern of development over time. The largest share of housing stock has been built from the 1970’s to 1990’s. Most housing built since 2000 has been single-family detached housing for homeowners. The largest single share of renter units date to the 1970’s.

FIGURE 3.5: AGE OF UNITS FOR OWNERS AND RENTERS



SOURCE: US Census
Census Tables: B25036 (2018 ACS 5-year Estimates)

- Unfortunately, good quantitative data on housing condition is generally unavailable without an intensive on-site survey of all local housing that is beyond the scope of this analysis. Census categories related to housing condition are ill-suited for this analysis, dealing with such issues as units without indoor plumbing, which was more common in the mid-20th Century, but is an increasingly rare situation. Age of units serves as the closest reliable proxy for condition with available data.
- For ownership units, older homes may be in poor condition, but are also more likely to have undergone some repair and renovation over the years. Rental units are more likely to degrade steadily with age and wear-and-tear, and less likely to receive sufficient reinvestment to keep them in top condition, though this is not universally true.

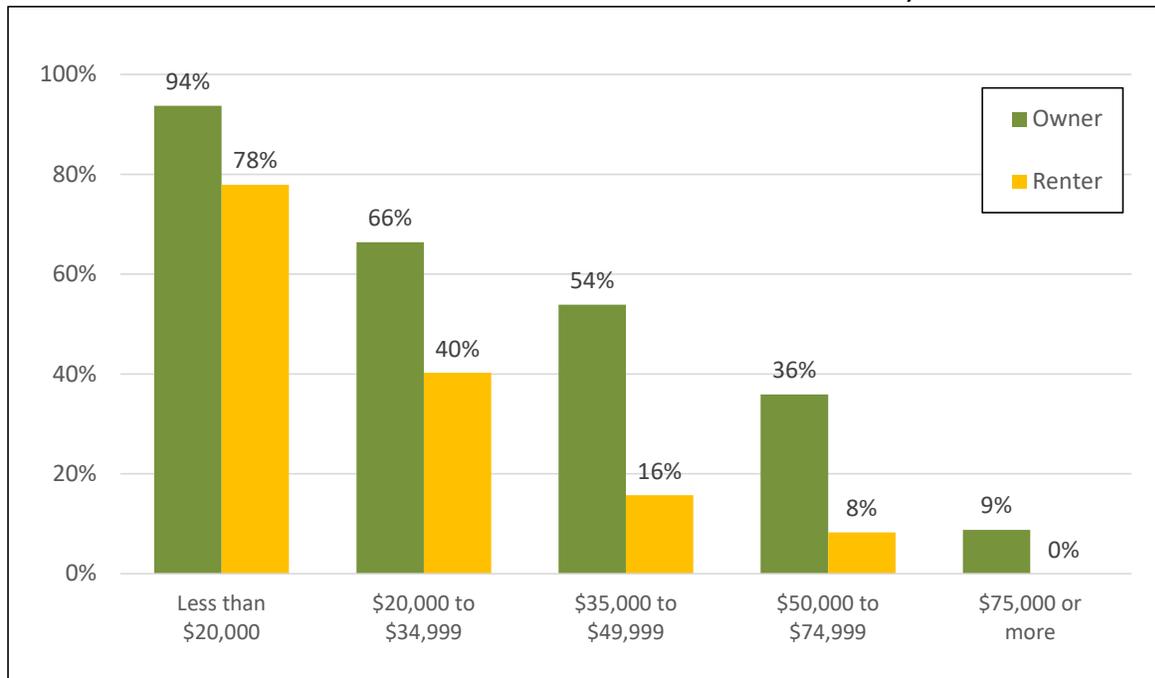
F. HOUSING COSTS VS. LOCAL INCOMES

Figure 3.6 shows the share of owner and renter households who are paying more than 30% of their household income towards housing costs, by income segment. (Spending 30% or less on housing costs is a common measure of “affordability” used by HUD and others, and in the analysis presented in this report.)

As one would expect, households with lower incomes tend to spend more than 30% of their income on housing, while incrementally fewer of those in higher income groups spend more than 30% of their incomes on housing costs. Of those earning less than \$20,000, an estimated 94% of owner households spend more than 30% of income on housing costs and 78% of renters. Because West Linn has an income distribution skewed towards higher income levels, there are relatively few households in these lower income segments, compared to most other cities.

In total, the US Census estimates that over 24% of West Linn households pay more than 30% of income towards housing costs (2018 American Community Survey, B25106)

FIGURE 3.6: SHARE OF HOUSEHOLDS SPENDING MORE THAN 30% ON HOUSING COSTS, BY INCOME GROUP



Sources: US Census, JOHNSON ECONOMICS
 Census Table: B25106 (2018 ACS 5-yr Estimates)

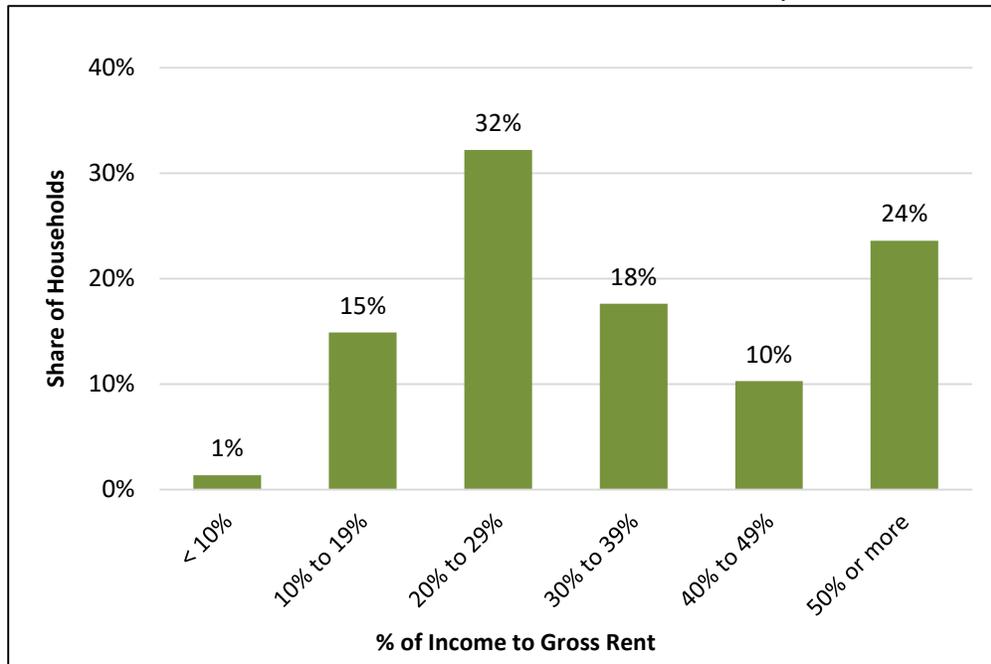
Housing is generally one of a household’s largest living costs, if not the largest. The ability to find affordable housing options, and even build wealth through ownership, is one of the biggest contributors to helping lower income

households save and build wealth. Even if renting, affordable housing costs, allow for more household income to be put to other needs, including saving.

The following figures shows the percentage of household income spent towards gross rent⁴ for local renter households only. This more fine-grained data shows that not only are 52% of renters spending more than 30% of their income on gross rent, but an estimated 24% of renters are spending 50% or more of their income on housing and are considered severely rent-burdened.

Renters are disproportionately lower income relative to homeowners. Housing cost burdens are felt more broadly for these households, and as the analysis presented in a later section shows there is a need for more affordable rental units in West Linn, as in most communities.

FIGURE 3.7: PERCENTAGE OF HOUSEHOLD INCOME SPENT ON GROSS RENT, WEST LINN RENTER HOUSEHOLDS



Sources: US Census, JOHNSON ECONOMICS
Census Table: B25070 (2018 ACS 5-yr Estimates)

G. PUBLICLY ASSISTED HOUSING

West Linn currently has very few subsidized apartment properties, according to Oregon Housing and Community Development (OHCS). These are properties that are funded through HUD programs, tax credits and other programs which guarantee subsidized rents for qualified households. There are an estimated 10 such units in West Linn, which appear to be in separate single-family homes rather than a multi-family development.

The high share of renters paying over 30% of their income towards housing costs indicates that there is an ongoing need for rental units at the lowest price points.

Agricultural Worker Housing: West Linn is not currently home to properties dedicated to agricultural workers. This population may also be served by other available affordable units.

Homelessness:

A Point-in-Time count of homeless individuals in Clackamas County conducted in January of 2019 found 1,166 homeless individuals on the streets, in shelters, or other temporary and/or precarious housing. This number was

⁴ The Census defines Gross Rent as “the contract rent plus the estimated average monthly cost of utilities (electricity, gas, and water and sewer) and fuels (oil, coal, kerosene, wood, etc.) if these are paid by the renter (or paid for the renter by someone else).” Housing costs for homeowners include mortgage, property taxes, insurance, utilities and condo or HOA dues.

2,196 individuals in the 2015 count, indicating that the rate of homelessness has fallen significantly as the economy has recovered since 2010. *These figures are for the entire county.*⁵ In 2019, this included:

- 50% of those counted were in emergency shelter, warming shelter, or transitional housing programs.
 - 18% people living in doubled-up or unstable housing.
 - 32% people unsheltered.
 - 454 were chronically homeless.
-
- An estimated 63% of those counted were male, 37% female, and 2% transgender or non-binary.
 - Children under the age of 18 made up 8% of those counted, at 98 individual children.

While the Point-in-Time count is one of the few systematized efforts to count homelessness across the country in a regular, systematized way, it is widely thought to undercount the population of homeless and precarious households. In addition, to the impossibility of finding all homeless people on the streets, the count is conducted in late January, when homeless counts are likely near their lowest of the year due to the inclement weather. A 2017 study conducted by Portland State University estimated over 38,000 homeless individuals in the tri-county metro area at that time. Given that Clackamas County is one of only three counties in the estimate, it most certainly had well more than 2,000 homeless individuals by that estimate.

A recent analysis prepared for OHCS to test a potential approach for preparing Housing Needs Analyses on a regional basis, included estimates of homeless population in Oregon communities, including West Linn. The approach utilizes a combination of data from the bi-annual Point-in-Time count and from tracking of homeless school-aged children in keeping with the McKinney-Vento Act. The analysis estimates 111 homeless households in West Linn as of mid-2020. These include household who are unsheltered, in temporary shelter, or staying with friends or relatives. These households are a component of current and future housing need.

An analysis of the ability of current and projected housing supply to meet the needs of low-income people, and the potential shortfall is included in the following sections of this report.

⁵ Figures via Clackamas County Health, Housing, and Human Services, and North Clackamas School District

IV. CURRENT HOUSING NEEDS (CITY OF WEST LINN)

The profile of current housing conditions in the study area is based on Census 2010, which the Portland State University Population Research Center (PRC) uses to develop yearly estimates through 2019. The 2019 estimate is forecasted to 2020 using the estimated growth rate realized since 2010.

FIGURE 4.1: CURRENT HOUSING PROFILE (2020)

CURRENT HOUSING CONDITIONS (2020)		SOURCE
Total 2020 Population:	25,995	PSU Pop. Research Center
- Estimated group housing population:	131 (0.5% of Total)	US Census
Estimated Non-Group 2020 Population:	25,864 (Total - Group)	
Avg. HH Size:	2.60	US Census
Estimated Non-Group 2020 Households:	9,948 (Pop/HH Size)	
Total Housing Units:	10,476 (Occupied + Vacant)	Census 2010 + permits
Occupied Housing Units:	9,948 (= # of HH)	
Vacant Housing Units:	528 (Total HH - Occupied)	
Current Vacancy Rate:	5.0% (Vacant units/ Total units)	

Sources: Johnson Economics, City of West Linn, PSU Population Research Center, U.S. Census

*This table reflects population, household and housing unit projections shown in Figure 2.1.

We estimate a current population of roughly 26,000 residents, living in 9,948 households (excluding group living situations). Average household size is 2.6 persons.

There are an estimated 10,476 housing units in the city, indicating an estimated vacancy rate of 5%. This includes units vacant for any reason, not just those which are currently for sale or rent.

ESTIMATE OF CURRENT HOUSING DEMAND

Following the establishment of the current housing profile, the current housing demand was determined based upon the age and income characteristics of current households.

The analysis considered the propensity of households in specific age and income levels to either rent or own their home (tenure), in order to derive the current demand for ownership and rental housing units and the appropriate housing cost level of each. This is done by combining data on tenure by age and tenure by income from the Census American Community Survey (tables: B25007 and B25118, 2018 ACS 5-yr Estimates).

The analysis takes into account the average amount that owners and renters tend to spend on housing costs. For instance, lower income households tend to spend more of their total income on housing, while upper income households spend less on a percentage basis. In this case, it was assumed that households in lower income bands would *prefer* housing costs at no more than 30% of gross income (a common measure of affordability). Higher income households pay a decreasing share down to 20% for the highest income households.

While the Census estimates that most low-income households pay more than 30% of their income for housing, this is an estimate of current *preferred* demand. It assumes that low-income households prefer (or demand) units affordable to them at no more than 30% of income, rather than more expensive units.

Figure 4.2 presents a snapshot of current housing demand (i.e., preferences) equal to the number of households in the study area (9,948). The breakdown of tenure (owners vs. renters) reflects data from the 2018 ACS.

FIGURE 4.2: ESTIMATE OF CURRENT HOUSING DEMAND (2020)

Ownership				
Price Range	# of Households	Income Range	% of Total	Cumulative
\$0k - \$80k	201	Less than \$15,000	2.6%	2.6%
\$80k - \$130k	113	\$15,000 - \$24,999	1.5%	4.0%
\$130k - \$190k	163	\$25,000 - \$34,999	2.1%	6.1%
\$190k - \$250k	388	\$35,000 - \$49,999	5.0%	11.1%
\$250k - \$330k	807	\$50,000 - \$74,999	10.4%	21.5%
\$330k - \$390k	875	\$75,000 - \$99,999	11.2%	32.7%
\$390k - \$470k	727	\$100,000 - \$124,999	9.3%	42.0%
\$470k - \$540k	716	\$125,000 - \$149,999	9.2%	51.2%
\$540k - \$710k	1,211	\$150,000 - \$199,999	15.5%	66.7%
\$710k +	2,591	\$200,000+	33.3%	100.0%
Totals:	7,792		% of All:	78.3%

Rental				
Rent Level	# of Households	Income Range	% of Total	Cumulative
\$0 - \$400	178	Less than \$15,000	8.3%	8.3%
\$400 - \$700	257	\$15,000 - \$24,999	11.9%	20.2%
\$700 - \$900	209	\$25,000 - \$34,999	9.7%	29.9%
\$900 - \$1200	219	\$35,000 - \$49,999	10.1%	40.0%
\$1200 - \$1600	472	\$50,000 - \$74,999	21.9%	62.0%
\$1600 - \$1900	159	\$75,000 - \$99,999	7.4%	69.3%
\$1900 - \$2200	214	\$100,000 - \$124,999	9.9%	79.3%
\$2200 - \$2500	156	\$125,000 - \$149,999	7.2%	86.5%
\$2500 - \$3400	92	\$150,000 - \$199,999	4.3%	90.8%
\$3400 +	199	\$200,000+	9.2%	100.0%
Totals:	2,156		% of All:	21.7%

All Households	9,948
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Sources: PSU Population Research Center, EnviroNics Analytics., Census, JOHNSON ECONOMICS
 Census Tables: B25007, B25106, B25118 (2018 ACS 5-yr Estimates)
 EnviroNics Analytics: Estimates of income by age of householder

The estimated home price and rent ranges are irregular because they are mapped to the affordability levels of the Census income level categories. For instance, an affordable home for those in the lowest income category (less than \$15,000) would have to cost \$80,000 or less. Affordable rent for someone in this category would be \$400 or less.

The affordable price level for ownership housing assumes 30-year amortization, at an interest rate of 5% (significantly more than the current rate, but in line with historic norms), with 15% down payment. These assumptions are designed to represent prudent lending and borrowing levels for ownership households. The 30-

year mortgage commonly serves as the standard. In the 2000's, down payment requirements fell significantly, but standards have tightened somewhat since the 2008/9 credit crisis. While 20% is often cited as the standard for most buyers, it is common for homebuyers, particularly first-time buyers, to pay significantly less than this using available programs.

Interest rates are subject to disruption from national and global economic forces, and therefore impossible to forecast beyond the short term. The 5% used here is roughly the average 30-year rate over the last 20 years. The general trend has been falling interest rates since the early 1980's, but coming out of the recent recession, many economists believe that rates cannot fall farther and must begin to climb as the Federal Reserve raises its rate over the coming years.

During the 2020 Covid-19 emergency, the Federal Reserve has again cut their benchmark funds rate to near zero, which has reduced mortgage rates moderately, but not dramatically. The economic uncertainty has the effect of making lenders more cautious, and this can balance the effect of a lower federal rate.

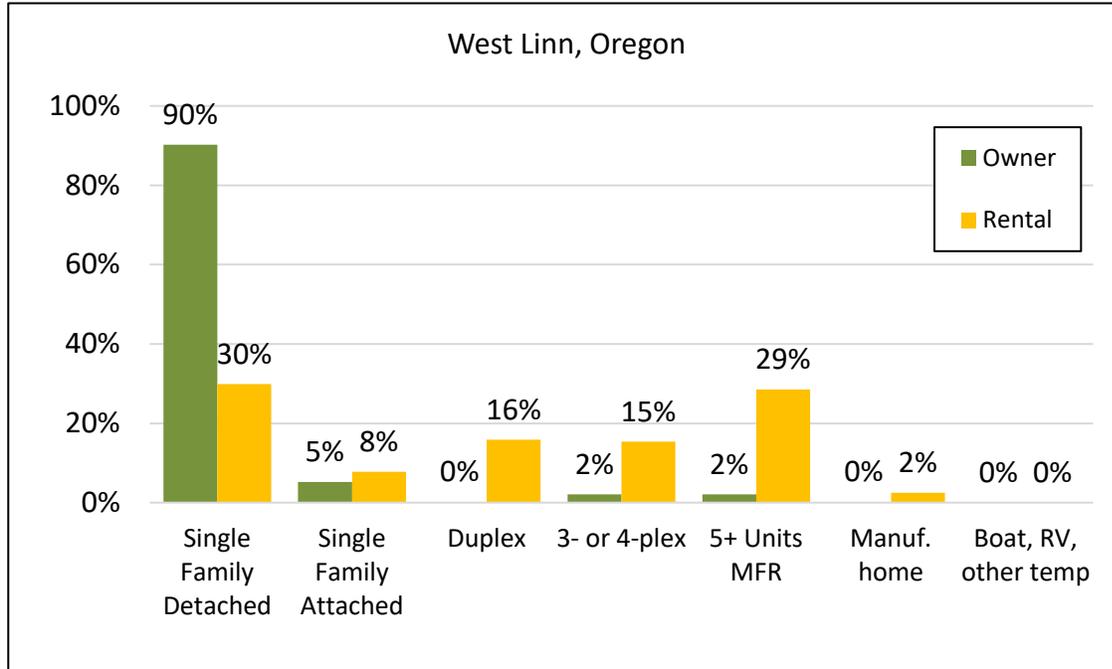
CURRENT HOUSING INVENTORY

The profile of current housing demand (Figure 4.2) represents the preference and affordability levels of households. In reality, the current housing supply (Figures 4.3 and 4.4 below) differs from this profile, meaning that some households may find themselves in housing units which are not optimal, either not meeting the household's own/rent preference, or being unaffordable (requiring more than 30% of gross income).

A profile of current housing supply in West Linn was estimated based on permit data from the City of West Linn and Census data from the most recently available 2018 ACS, which provides a profile of housing types (single family, attached, manufactured home, etc.), tenure, housing values, and rent levels. The 5-year estimates from the ACS were used because 3-year and 1-year estimates are not yet available for West Linn geography.

- An estimated 79% of housing units are ownership units, while an estimated 20% of housing units are rental units. This is similar to the estimated demand profile shown in Figure 4.2, which estimated a somewhat higher demand for rental units over time. The inventory includes vacant units, and in the case of West Linn many vacant units are estimated to be second homes or seasonal homes, which are counted as ownership units. The available rental units are estimated to have a much lower vacancy rate.
- 90% of ownership units are detached homes, and very few are manufactured homes. Thirty-two percent of rental units are either single family homes or manufactured homes, while 29% are in structures of 5 units or more.
- Of total housing units, an estimated 78% are detached homes or manufactured homes. Twenty-two percent are some sort of attached unit type.
- The affordability of different unit types is an approximation based on Census data on the distribution of housing units by value (ownership) or gross rent (rentals).
- Most subsidized affordable housing units found in the city are represented by the inventory at the lowest end of the rental spectrum.
- Ownership housing found at the lower end of the value spectrum generally reflect older, smaller homes, or homes in poor condition on small or irregular lots. **It is important to note that these represent estimates of current property value or current housing cost to the owner, not the current market pricing of homes for sale in the city.** These properties may be candidates for redevelopment when next they sell but are currently estimated to have low value.

FIGURE 4.3: PROFILE OF CURRENT HOUSING SUPPLY BY TYPE (2020)



Sources: US Census, PSU Population Research Center, JOHNSON ECONOMICS
 Census Tables: B25004, B25032, B25063, B25075 (2018 ACS 5-yr Estimates)

FIGURE 4.4: PROFILE OF CURRENT HOUSING SUPPLY, ESTIMATED AFFORDABILITY (2020)

Income Range	Ownership Housing		Rental Housing		Share of Total Units	
	Affordable Price Level	Estimated Units	Affordable Rent Level	Estimated Units		
Less than \$15,000	\$0k - \$80k	89	\$0 - \$400	0	1%	
\$15,000 - \$24,999	\$80k - \$130k	143	\$400 - \$700	87	2%	
\$25,000 - \$34,999	\$130k - \$190k	155	\$700 - \$900	234	4%	
\$35,000 - \$49,999	\$190k - \$250k	425	\$900 - \$1200	469	9%	
\$50,000 - \$74,999	\$250k - \$330k	838	\$1200 - \$1600	438	12%	
\$75,000 - \$99,999	\$330k - \$390k	1,139	\$1600 - \$1900	305	14%	
\$100,000 - \$124,999	\$390k - \$470k	1,371	\$1900 - \$2200	244	15%	
\$125,000 - \$149,999	\$470k - \$540k	948	\$2200 - \$2500	214	11%	
\$150,000 - \$199,999	\$540k - \$710k	1,783	\$2500 - \$3400	159	19%	
\$200,000+	\$710k +	1,374	\$3400 +	62	14%	
		79%	8,264	21%	2,212	

Sources: US Census, PSU Population Research Center, JOHNSON ECONOMICS
 Census Tables: B25004, B25032, B25063, B25075 (2018 ACS 5-yr Estimates)

- Most housing in West Linn is found in price and rent levels affordable to those earning at least \$50,000 per year. There is very little housing available to those in lower income segments.

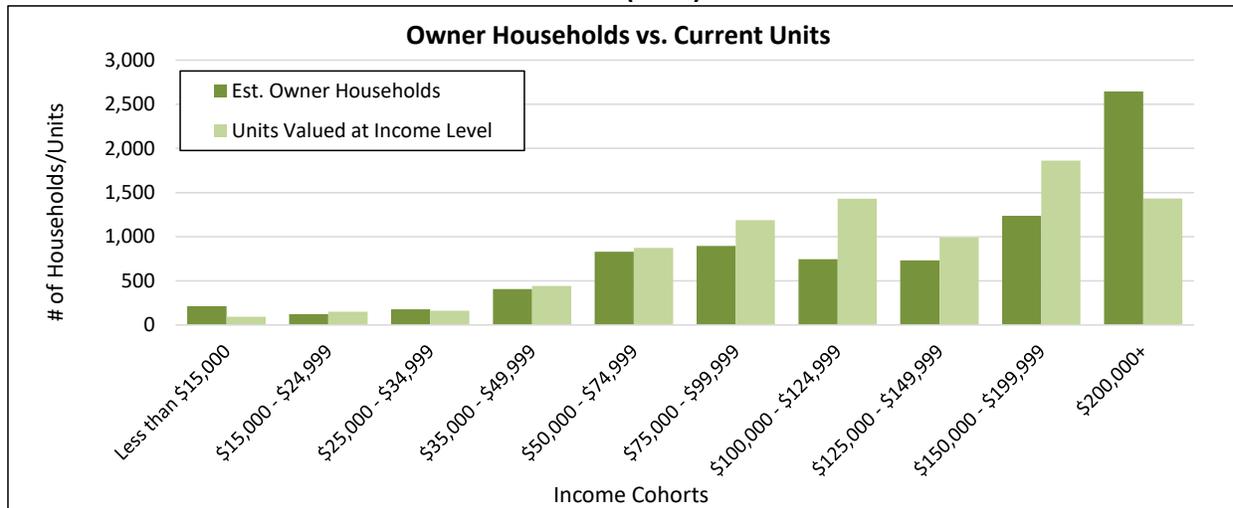
COMPARISON OF CURRENT HOUSING DEMAND WITH CURRENT SUPPLY

A comparison of estimated current housing *demand* with the existing *supply* identifies the existing discrepancies between needs and the housing which is currently available. The estimated number of units outnumbers the number of households by roughly 530 units, indicating an average vacancy rate of 5%.

In general, this identifies that there is currently support for more ownership housing at lower price points and at the upper end of the market. This is because most housing in West Linn is clustered at upper-middle property values, which matches the community’s high average household incomes but leaves some households underserved.

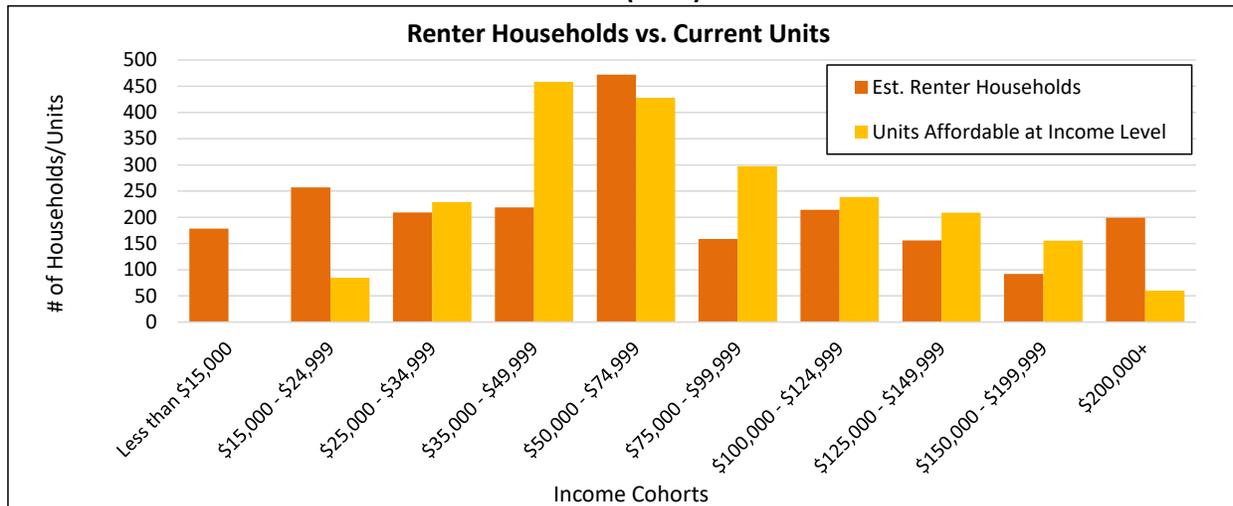
Figures 4.5 and 4.6 present this information in chart form, comparing the estimated number of households in given income ranges, and the supply of units currently valued (ownership) or priced (rentals) within those income ranges. The data is presented for owner and renter households.

FIGURE 4.5: COMPARISON OF OWNER HOUSEHOLD INCOME GROUPS TO ESTIMATED SUPPLY AFFORDABLE AT THOSE INCOME LEVELS (2020)



Sources: PSU Population Research Center, City of West Linn, Census, JOHNSON ECONOMICS

FIGURE 4.6: COMPARISON OF RENTER HOUSEHOLD INCOME GROUPS TO ESTIMATED SUPPLY AFFORDABLE AT THOSE INCOME LEVELS (2020)



Sources: PSU Population Research Center, City of West Linn, Census, JOHNSON ECONOMICS

The analysis finds that the current market rates for most rental units are in the \$900 to \$2,000/month range. Therefore, this is where most of the rental unit supply is currently clustered. However, the greatest unmet need is found at the lowest end of the income scale, where many current renters pay more than 30% of their income in housing costs. Rentals at the most expensive levels generally represent single family homes for rent.

The home value and rent segments which show a “surplus” in Figures 4.5 and 4.6 illustrate where current property values and market rent levels are in West Linn. Housing prices and rent levels will tend to congregate around those levels. These levels will be too costly for some (i.e., require more than 30% in gross income) or “too affordable” for others (i.e., they have income levels that indicate they could afford more expensive housing if it were available).

In general, these findings demonstrate that there are few lower-value housing opportunities for many owner households, and potential support for some less expensive types of ownership housing. There is a need for more rental units at lower rent levels (<\$900/mo.).

HOME SALE PRICES

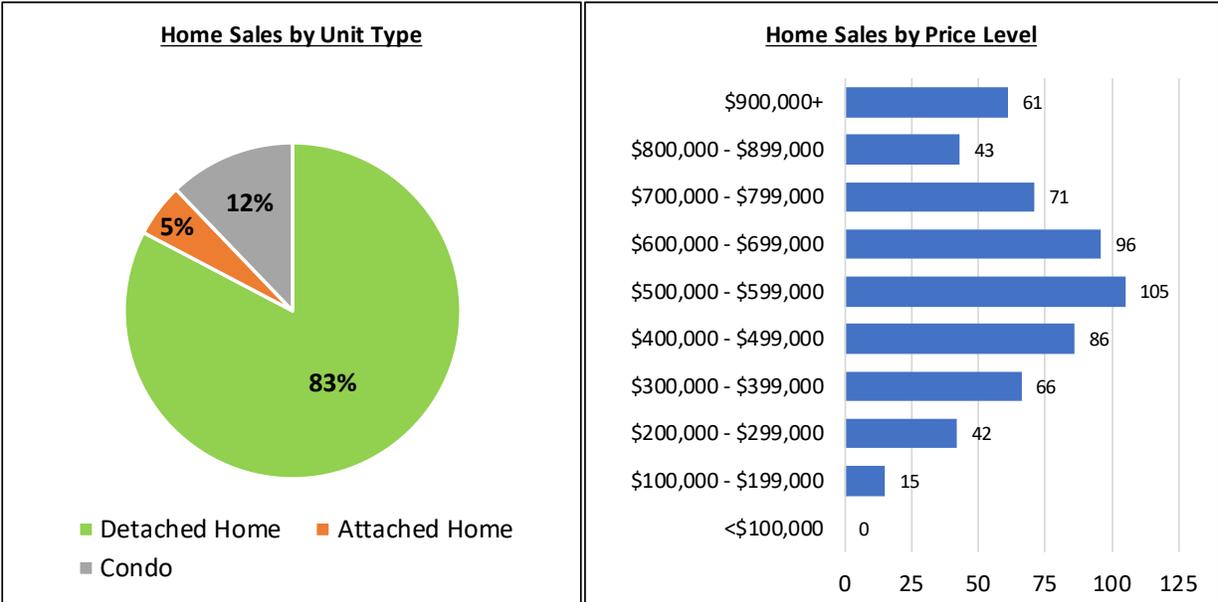
It is important to note that the figures presented in the prior section represent estimates of current *property value or current housing cost to the owner, not the current market pricing of homes for sale in the city.* For instance, a household living in a manufactured home that has been paid off over many years may have relatively low housing costs. This indicates that one owner household is living in a “lower value” unit. It does **not** indicate that units at this price point are available on the current market.

If this hypothetical household were to sell their home, it would sell at a higher price reflecting inflation and current achievable market prices. For this reason, many of the lower value or lower rent units found in the previous section will actually become higher-priced units when they are sold or become vacant.

For reference, this section presents home sales data from fall 2019 to fall 2020 to indicate housing costs for new entrants into the market (Figure 4.7).

- The median sale price was \$585,000.
- The average (mean) sale price was \$635,000.
- The average price per square foot was \$230/s.f.
- The median square footage was 2,630 s.f.

FIGURE 4.7: WEST LINN HOME SALES (12 MONTHS)



Sources: RMLS, JOHNSON ECONOMICS

- 18% of sales were priced between \$500,000 and \$599,000.
- 15% of sales were priced between \$400,000 and \$499,000.
- 46% of sales were priced at \$600,000 or more.
- 10% of sales were priced over \$900,000.
- Only 10% of sales were priced below \$300,000.

Affordability: As indicated, half of recent sales in West Linn took place within the \$400,000 to \$700,000 price range. Homes in this range should be mostly affordable to households earning at least \$100,000 per year. An estimated 60% of local households fall within these income segments.

Roughly 40% of households earn less than \$100,000 per year, meaning that the bulk of housing supply on the current for-sale market is likely too expensive for most of these households.

* * *

The findings of current need form the foundation for projected future housing need, presented in the following section.

V. FUTURE HOUSING NEEDS - 2040 (CITY OF WEST LINN)

The projected future (20-year) housing profile (Figure 5.1) in the study area is based on the current housing profile (2020), multiplied by an assumed projected future household growth rate. The projected future growth is the forecasted 2040 population for the City of West Linn included in the most recent Metro Urban Growth analysis and Regional Transportation Plan analysis (0.3%).

FIGURE 5.1: FUTURE HOUSING PROFILE (2040)

PROJECTED FUTURE HOUSING CONDITIONS (2020 - 2040)		SOURCE
2020 Population (Minus Group Pop.)	25,864	PSU
Projected Annual Growth Rate	0.3%	Metro UGR Forecast Program
2040 Population (Minus Group Pop.)	27,720	(Total 2040 Population - Group Housing Pop.)
Estimated group housing population:	141	Share of total pop. (0.5%)
Total Estimated 2040 Population:	27,861	
Estimated Non-Group 2040 Households:	10,907	(2040 Non-Group Pop./Avg. Household Size)
New Households 2020 to 2040	959	
Avg. Household Size:	2.54	Projected household size
Total Housing Units:	11,481	Occupied Units plus Vacant
Occupied Housing Units:	10,907	(= Number of Non-Group Households)
Vacant Housing Units:	574	(= Total Units - Occupied Units)
Projected Market Vacancy Rate:	5.0%	(Vacant Units/ Total Units)

Sources: PSU Population Research Center, Metro, Census, JOHNSON ECONOMICS LLC

*Projections are applied to estimates of 2020 population, household and housing units shown in Figure 2.1.

The model projects growth in the number of non-group households over 20 years of roughly 960 households, with accompanying population growth of 1,866 new residents. (The number of households differs from the number of housing units, because the total number of housing units includes a percentage of vacancy. Projected housing unit needs are discussed below.)

PROJECTION OF FUTURE HOUSING UNIT DEMAND (2040)

The profile of future housing demand was derived using the same methodology used to produce the estimate of current housing need. This estimate includes current and future households but *does not include a vacancy assumption. The vacancy assumption is added in the subsequent step.* Therefore, the need identified below is the total need for actual households in occupied units (10,907).

The analysis considered the propensity of households at specific age and income levels to either rent or own their home, in order to derive the future need for ownership and rental housing units, and the affordable cost level of each. The projected need is for *all* 2040 households and therefore includes the needs of current households.

The price levels presented here use the same assumptions regarding the amount of gross income applied to housing costs, from 30% for low-income households down to 20% for the highest income households.

The affordable price level for ownership housing assumes 30-year amortization, at an interest rate of 5%, with 15% down payment. Because of the impossibility of predicting variables such as interest rates 20 years into the future,

these assumptions were kept constant from the estimation of current housing demand. Income levels and price levels are presented in 2020 dollars.

Figure 5.2 presents the projected occupied future housing demand (current and new households, without vacancy) in 2040.

FIGURE 5.2: PROJECTED OCCUPIED FUTURE HOUSING DEMAND (2040)

Ownership				
Price Range	# of Households	Income Range	% of Total	Cumulative
\$0k - \$80k	214	Less than \$15,000	2.5%	2.5%
\$80k - \$130k	119	\$15,000 - \$24,999	1.4%	3.9%
\$130k - \$190k	173	\$25,000 - \$34,999	2.0%	6.0%
\$190k - \$250k	415	\$35,000 - \$49,999	4.9%	10.9%
\$250k - \$330k	864	\$50,000 - \$74,999	10.2%	21.0%
\$330k - \$390k	959	\$75,000 - \$99,999	11.3%	32.3%
\$390k - \$470k	797	\$100,000 - \$124,999	9.4%	41.7%
\$470k - \$540k	785	\$125,000 - \$149,999	9.2%	50.9%
\$540k - \$710k	1,328	\$150,000 - \$199,999	15.6%	66.6%
\$710k +	2,841	\$200,000+	33.4%	100.0%
Totals:	8,496		% of All:	77.9%

Rental				
Rent Level	# of Households	Income Range	% of Total	Cumulative
\$0 - \$400	202	Less than \$15,000	8.4%	8.4%
\$400 - \$700	287	\$15,000 - \$24,999	11.9%	20.3%
\$700 - \$900	235	\$25,000 - \$34,999	9.8%	30.0%
\$900 - \$1200	250	\$35,000 - \$49,999	10.4%	40.4%
\$1200 - \$1600	538	\$50,000 - \$74,999	22.3%	62.7%
\$1600 - \$1900	174	\$75,000 - \$99,999	7.2%	69.9%
\$1900 - \$2200	235	\$100,000 - \$124,999	9.8%	79.7%
\$2200 - \$2500	171	\$125,000 - \$149,999	7.1%	86.8%
\$2500 - \$3400	101	\$150,000 - \$199,999	4.2%	91.0%
\$3400 +	218	\$200,000+	9.0%	100.0%
Totals:	2,411		% of All:	22.1%

All Units	10,907
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Sources: Census, Environics Analytics, JOHNSON ECONOMICS

The number of households across the income spectrum seeking a range of both ownership and rental housing is anticipated to grow. It is projected that the homeownership rate in West Linn will fall slightly over the next 20 years to 78% from 79%, which would still be significantly higher than the Clackamas County and statewide ownership rates.

COMPARISON OF FUTURE HOUSING DEMAND TO CURRENT HOUSING INVENTORY

The profile of occupied future housing demand presented above (Figure 5.2) was compared to the current housing inventory presented in the previous section to determine the total future need for *new* housing units by type and price range (Figure 5.3).

This estimate includes a vacancy assumption. As reflected by the most recent Census data, and as is common in most communities, the vacancy rate for rental units is typically higher than that for ownership units. An average vacancy rate of 5% is assumed for the purpose of this analysis.

FIGURE 5.3: PROJECTED FUTURE NEED FOR NEW HOUSING UNITS (2040), WEST LINN

OWNERSHIP HOUSING									
Unit Type:	Single Family Detached	Single Family Attached	Multi-Family			Manuf. home	Boat, RV, other temp	Total Units	% of Units
			2-unit	3- or 4-plex	5+ Units MFR				
Totals:	572	56	8	14	28	1	0	679	67.6%
Percentage:	84.3%	8.2%	1.2%	2.1%	4.1%	0.2%	0.0%	100%	

RENTAL HOUSING									
Unit Type:	Single Family Detached	Single Family Attached	Multi-Family			Manuf. home	Boat, RV, other temp	Total Units	% of Units
			2-unit	3- or 4-plex	5+ Units MFR				
Totals:	71	29	55	53	109	8	0	326	32.4%
Percentage:	21.9%	8.8%	16.9%	16.4%	33.5%	2.5%	0.0%	100%	

TOTAL HOUSING UNITS									
Unit Type:	Single Family Detached	Single Family Attached	Multi-Family			Manuf. home	Boat, RV, other temp	Total Units	% of Units
			2-unit	3- or 4-plex	5+ Units MFR				
Totals:	644	84	63	68	137	9	0	1,005	100%
Percentage:	64.1%	8.4%	6.3%	6.8%	13.6%	0.9%	0.0%	100%	

Sources: PSU, City of West Linn, Census, Environics Analytics, JOHNSON ECONOMICS

- The results show a need for 1,005 new housing units by 2040.
- Of the new units needed, roughly 68% are projected to be ownership units, while 32% are projected to be rental units. This represents more renters than the estimated tenure split, but it is projected that more rental units will need to be added to balance the disproportionate share of ownership units in the current inventory.
- Currently, the estimated vacancy rate of rental units is very low, so to serve the current need, future need, and allow for a 5% vacancy rate, a disproportionate number of rental units are needed. The current vacancy rate for ownership units, including second homes, is higher, so fewer new ownership units are projected.
- There is some need for new ownership housing at the low-end and upper end of the pricing spectrum. But income trends suggest that the greatest demand will remain in the upper-middle price ranges (\$300k to \$600k).
- The greatest need for rental units is found at the lowest and some higher price points. Market rents are currently clustered in the \$900 to \$2,000 range in current dollars. Therefore, most units are to be found in this range. There is insufficient rental housing for the lowest income households making \$35,000 or less.

FIGURE 5.4: ESTIMATED CURRENT NEED & FUTURE NEED BY INCOME BRACKET WEST LINN

Income Range	Current Need (no vacancy)	Future Need (no vacancy)	New Need (with vacancy)	Share of Units
Less than \$15,000	380	416	43	4%
\$15,000 - \$24,999	370	406	44	4%
\$25,000 - \$34,999	372	408	43	4%
\$35,000 - \$49,999	607	665	66	7%
\$50,000 - \$74,999	1,279	1,402	140	14%
\$75,000 - \$99,999	1,034	1,133	101	10%
\$100,000 - \$124,999	941	1,032	94	9%
\$125,000 - \$149,999	872	956	86	9%
\$150,000 - \$199,999	1,303	1,429	124	12%
\$200,000+	2,790	3,059	265	26%
Total:	9,948	10,907	1,005	

Sources: PSU, City of West Linn, Census, Environics Analytics, JOHNSON ECONOMICS

Needed Unit Types

The mix of needed unit types shown in Figure 5.3 reflects both past trends and anticipated future trends. Since 2000, detached single family units have continued to constitute most of the permitted units in West Linn. In keeping with development trends, and the buildable land available to West Linn, single family units are expected to continue to make up a large share of new ownership housing over the next 20 years. However, an increasing share of new units is anticipated to be attached housing types to accommodate renters and first-time home buyers.

- 64% of the new units are projected to be single family detached homes, while 35% is projected to be some form of attached housing, and under 1% are projected to be new manufactured homes.
- Single family attached units (townhomes on individual lots) are projected to meet 8% of future need. These are defined as units on separate tax lots, attached by a wall but separately metered, the most common example being townhome units.
- Duplex through four-plex units are projected to represent 13% of the total need. Duplex units would include a detached single-family home with an accessory dwelling unit on the same lot, or with a separate unit in the home (for instance, a rental basement unit.) This includes attached units allowed to be built in single-family neighborhoods under new statewide rules.
- 14% of all needed units are projected to be multi-family in structures of 5+ attached units.
- Of ownership units, 84% are projected to be detached single-family homes, and 16% projected to be attached forms.
- About 76% of new rental units are projected to be found in new attached buildings, with 34% projected in rental properties of 5 or more units, and 33% in buildings of two to four units, and 9% in attached single family forms. Only 22% of new rental units are projected to be detached homes.

Needed Affordability Levels

Figure 5.5 presents the estimated need for net new housing units by major income segment, based on the projected demographics of new households to the market area. The needed affordability levels presented here are based on current 2020 dollars. Over time, incomes and housing costs will both inflate, so the general relationship projected here is expected to remain unchanged.

Figure 5.5 also discusses the housing types typically attainable by residents at these income levels.

FIGURE 5.5: PROJECTED NEED FOR NEW HOUSING AT DIFFERENT INCOME LEVELS

Household Income Segment	Income Level (Rounded)*	Afford. Rent Range	Afford. Price Range	Owner Units	Renter Units	Total	Share	Common Housing Product
Extremely Low Inc. < 30% AMI	< \$27,500	<\$800	<\$150k	21	76	97	10%	Govt-subsidized; Voucher
Very Low Income 30% - 50% AMI	\$27.5k - \$46k	\$800-\$1,100	\$150k-\$225k	27	54	80	8%	Aging/substandard rentals; Govt-subsidized; Voucher
Low Income 50% - 80% AMI	\$46k - \$73.5k	\$1,100-\$1,600	\$225k-\$330k	59	90	150	15%	Market apts; Manuf. homes; Plexes; Aging SFR
Middle Income 80% - 120% AMI	\$73.5k - \$110.5k	\$1,600-\$2,100	\$330k-\$475k	113	35	148	15%	Single-family detached; Townhomes; Small homes; New apts
Upper Income > 120% AMI	> \$110,500	\$2,100 +	\$475k +	459	70	530	53%	Single-family detached
TOTAL:				679	326	1,005	100%	

* Adjusted to 2020 dollars. The median household income level in 2020 will be will be inflated from current levels.

Sources: HUD, Census, Environics Analytics, JOHNSON ECONOMICS

- Generally, based on income levels there is a shortage of units in the lowest pricing levels for renter and owner households.
- Figure 5.3 presents the *net NEW* housing unit need over the next 20 years. However, there is also a *current* need for more affordable units. In order for all households, current and new to pay 30% or less of their income towards housing in 2040, more affordable rental units would be required. This indicates that some of the current supply, while it shows up as existing available housing, would need to become less expensive to meet the needs of current households.
- There is a finding of current and new need at the lowest end of the rental spectrum (\$900 and less).
- The projection of future ownership units finds that the supply at the lowest end of the spectrum is currently insufficient due to the prevalence of newer homes most of which are detached houses. (This reflects the estimated *value* of the total housing stock, and not necessarily the average pricing for housing currently for sale.) Ownership options and lower and middle price points are townhomes, condos, and small detached homes, often on smaller lots.
- Figure 5.6 presents estimates of need at key low-income affordability levels in 2020 and in 2040. There is existing and on-going need at these levels, based on income levels specified by Oregon Housing and Community Services for Clackamas County. An estimated 30% of households qualify as at least “low income” or lower on the income scale, while 9% of household qualify as “extremely low income”.
- Typically, only rent-subsidized properties can accommodate these lowest-income households at “affordable” housing cost levels. (The threshold income levels presented here are generated for the entire county based on the significantly lower countywide average household income in comparison to West Linn.)

FIGURE 5.6: PROJECTED NEED FOR HOUSING AFFORDABLE AT LOW INCOME LEVELS, WEST LINN

Affordability Level	Income Level*		Current Need (2020)		Future Need (2040)		NEW Need (20-Year)	
			# of HH	% of All	# of HH	% of All	# of HH	% of All
Extremely Low Inc.	30% AMI	\$27,630	848	9%	945	9%	97	10%
Very Low Income	50% AMI	\$46,050	1,569	16%	1,746	16%	178	18%
Low Income	80% AMI	\$73,680	2,940	30%	3,267	30%	327	33%

Sources: OHCS, Environics Analytics, JOHNSON ECONOMICS

* Income levels are based on OHCS guidelines for a family of four.

Agricultural Worker Housing

There is currently no housing dedicated to this population in West Linn. Based on the assumption that this type of housing will maintain its current representation in the local housing stock, this indicates that there will likely be no new need for housing dedicated specifically for agricultural workers over the planning period. However, this population may also be served by other available affordable units.

VI. RECONCILIATION OF FUTURE NEED (2040) & LAND SUPPLY

This section summarizes the results of the Buildable Lands Inventory (BLI). The BLI is presented in detail in an accompanying memo to this report. This analysis relies on the most conservative estimate of capacity from the multiple scenarios considered in the BLI memo.

The following table (Figure 6.1) presents the estimated new unit capacity of the buildable lands identified in the City of West Linn and within the UGB. The table breaks down the City's zoning into broad categories:

- Low density (<8 units/gross acre)
- Medium density (8 – 18 units/gross acre)
- High density (18+ units/gross acre)

Residential zones, as well as mixed-use zones that can accommodate some residential uses, were included in the inventory.

FIGURE 6.1: ESTIMATED BUILDABLE LANDS CAPACITY BY ACREAGE AND NO. OF UNITS (2020)

ZONING		Unconstrained Acres			Unit Capacity	
		Vacant	Infill	Total	Units	Share
RESIDENTIAL ZONE	Category					
R-40	Low-Density Res.	0.0	0.0	0.0	0	0%
R-20	Low-Density Res.	0.0	0.0	0.0	1	0%
R-15	Low-Density Res.	6.0	1.2	7.2	30	2%
R-10	Low-Density Res.	30.8	102.9	133.7	727	60%
R-7	Low-Density Res.	3.5	10.3	13.8	89	7%
R-5	Medium-Density Res.	3.0	9.2	12.2	105	9%
R-4.5	Medium-Density Res.	2.7	10.9	13.6	134	11%
R-3	High-Density Res.	0.0	0.0	0.0	0	0%
R-2.1	High-Density Res.	0.0	1.9	1.9	36	3%
LD	Low-Density Res.	6.8	10.4	17.2	83	7%
<i>TOTALS:</i>		<i>52.8</i>	<i>146.8</i>	<i>199.6</i>	<i>1,205</i>	<i>100%</i>
ZONE CATEGORIES	Typical Housing Type					
Low-Density Res.	Single-family detached; Some SF attached & plex	47.1	124.8	171.9	930	77%
Medium-Density Res.	SF attached; Manufact. home; 2-4 plexes	5.7	20.1	25.8	239	20%
High-Density Res.	Multi-family apartments	0.0	1.9	1.9	36	3%
<i>TOTALS:</i>		<i>52.8</i>	<i>146.8</i>	<i>199.6</i>	<i>1,205</i>	<i>100%</i>

Source: Angelo Planning Group

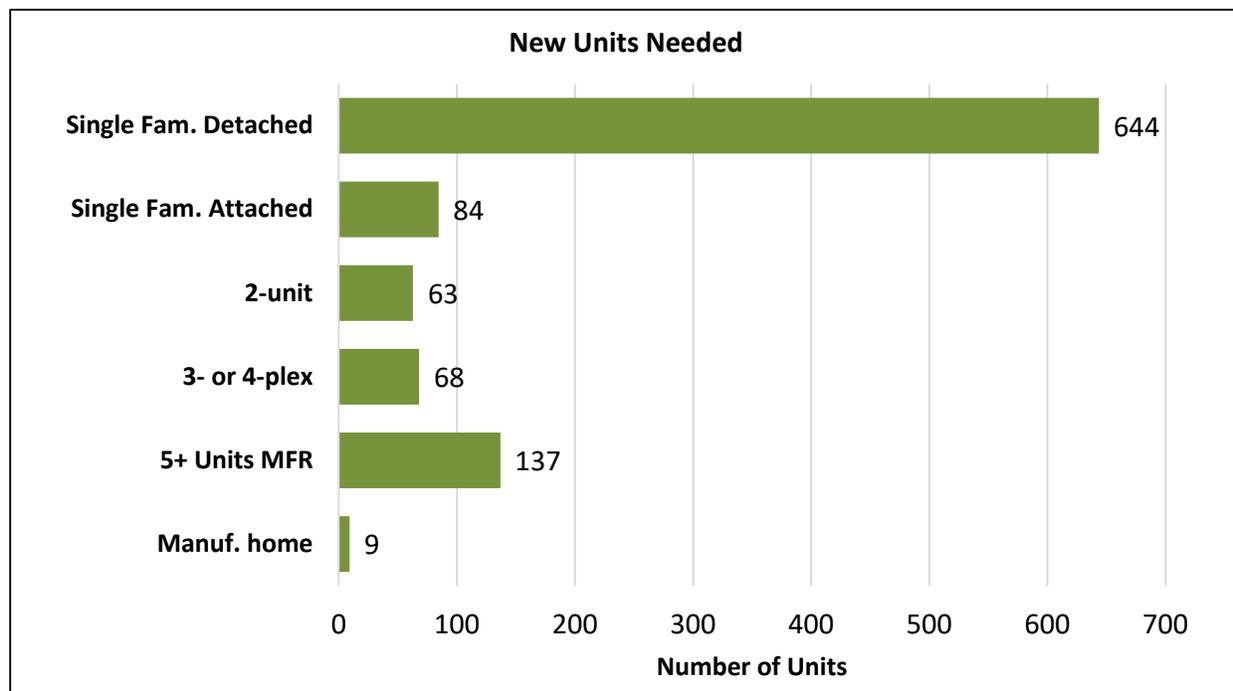
- There is a total estimated remaining capacity of 1,205 units of different types within the study area.
- Most of the remaining buildable acreage is in the low-density residential zones. At a total capacity 930 housing units, these zones represent roughly 77% of the total unit capacity.

- There are sufficient buildable medium-density acres to accommodate nearly 239 new units. This is 20% of the total unit capacity.
- There are very few available buildable acres in the high-density zone. In total, the capacity of these zones represents just 3% of the total unit capacity.

The following table summarizes the forecasted future unit need for West Linn. These are the summarized results from Section V of this report, presented here for reference.

FIGURE 6.2: SUMMARY OF FORECASTED FUTURE UNIT NEED (2040)

TOTAL HOUSING UNITS									
Unit Type:	Single Family Detached	Single Family Attached	Multi-Family			Manuf. home	Boat, RV, other temp	Total Units	% of Units
			2-unit	3- or 4-plex	5+ Units MFR				
Totals:	644	84	63	68	137	9	0	1,005	100%
Percentage:	64.1%	8.4%	6.3%	6.8%	13.6%	0.9%	0.0%	100%	



Sources: PSU Population Research Center, Census, Johnson Economics

Comparison of Housing Need and Capacity

There is a total forecasted need for just over 1,000 units over the next 20 years based on the forecasted growth rate. This is less than the estimated total capacity of 1,205 units. Figure 6.3 below presents a comparison of the BLI capacity for new housing units, compared to the estimate for new unit need by 2040. It breaks down need by general zoning category (LDR, MDR, HDR).

- The results find ample capacity for low-density housing, and medium-density housing.
- The amount of land zoned for “high-density housing” is insufficient for the projected demand for high-density housing types. There is a projected deficit of 5 acres of land in this zone to accommodate the forecasted number of multi-family apartment units.

- Under recently adopted state rules (HB2001, 2019), West Linn as a Metro-area city will be required in the future to allow for additional housing types in low-density residential zones. This includes attached single-family homes (townhomes), duplex-to-fourplex, and compact small-unit “cottage cluster” developments.
- In the case of West Linn, given the shortage of HDR-zoned land presented below, it becomes more likely that available land in lower-density zones may be developed with attached forms of housing, as other lands to accommodate these units is scarce. At the same time, there is capacity in the MDR zones to accommodate demand for most of the attached types listed above.
- These findings assume that under newly adopted state rules, 2% of available buildable parcels in the LDR zone will be used for the various types of attached units (single-family attached townhomes, duplex – fourplex). This amounts to a total of 28 attached units, plus 644 detached units in the LDR zone.

FIGURE 6.3: COMPARISON OF FORECASTED FUTURE LAND NEED (2040) WITH AVAILABLE CAPACITY

WITHIN CITY LIMITS		SUPPLY			DEMAND		
Zone & Plan Category	Typical Housing Type	Buildable Land Inventory (Total)			Growth Rate (1.8%)		
		Developable Acres	Unit Capacity	Avg. Density (units/ac)	New Unit Need (2040)	Surplus or (Deficit)	
						Units	Acres
Low-Density	Single-family detached; Some SF attached & plex	171.9	930	5.4	672	258	48
Med-Density	SF attached; Manufact. home; 2-4 plexes	25.8	239	9.3	196	43	5
High-Density	Multi-family apartments	1.9	36	18.9	137	(101)	(5)
<i>TOTALS:</i>		<i>199.6</i>	<i>1,205</i>	<i>6.0</i>	<i>1,005</i>	<i>200</i>	<i>47</i>

Sources: Angelo Planning Group, Johnson Economics



MEMORANDUM

West Linn Buildable Lands Inventory

City of West Linn

DATE June 10, 2021
TO Darren Wyss and Chris Meyers, City of West Linn, OR
FROM Brandon Crawford, Matt Hastie, APG
CC Jennifer Donnelly and Samuel Garcia, DLCD
Brendan Buckley, Johnson Economics

INTRODUCTION

The purpose of this memorandum is to describe the methodology and data sources for the City of West Linn Residential Buildable Lands Inventory (BLI) and the initial results of the inventory. This BLI is a component of the West Linn Housing Capacity Analysis (HCA) project, and the results will inform the Residential Land Needs Analysis (RLNA) and the Measures to Accommodate Needed Housing. The West Linn HNA is being funded through a Department of Land Conservation and Development (DLCD) grant for implementing applicable requirements of House Bills 2001 (Middle Housing) and 2003 (Regional Housing Needs Analysis) implementation. The BLI addresses land within the West Linn city limits, shown in Figure 1.

The BLI is conducted in several steps, as follows.

- **Step 1: Identify Constraints.** Constraints include the City's regulatory floodway and floodplain (100-year), steep slopes, and Title 3 and 13 areas.
- **Step 2: Classification of Land.** APG has classified every tax lot within the West Linn city limits based on residential zoning designation. The BLI for this project is confined to those properties that are designated or zoned for residential uses.
- **Step 3: Assign Development Status.** Each tax lot within the West Linn city limits is given a "development status." These development statuses are based on assessor's data, aerial photography, and staff input. Each development status type is defined later in the memo.
- **Step 4: Determine Developable Acreage and Development Capacity.** Tax lots with a "vacant" or "infill" status are given an amount of developable acreage based on their size, existing uses, and any development constraints on the property identified in Step 1. For land categorized as residential, APG has identified development capacity in number of units based on the developable acreage of a parcel and a review of the City's zoning regulations.

The remainder of this memorandum discusses these steps and initial results in greater detail.

LEGAL FRAMEWORK

STATE RULES AND STATUTES

This memorandum draws on requirements related to analyzing buildable lands for UGB expansions in jurisdictions throughout Oregon and the Portland Metropolitan area. Relevant to this analysis are provisions under OAR 660 Division 24, Urban Growth Boundaries (660-024-0050 Land Inventory and Response to Deficiency) and Division 7, Metropolitan Housing (660-007). The State's Metropolitan Housing provision requires jurisdictions in the Portland Metropolitan (Metro) urban growth boundary to follow BLI guidelines for HNAs that are separate from the rest of the State's HNA requirements. This BLI uses the same methodology as the Metro Urban Growth Report (UGR, 2018).¹

Figure 1 shows the project study area, which includes all land within the West Linn city limits, as well small portions of unincorporated land within the UGB along the southwest border of the City.

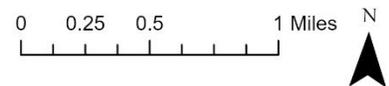
¹ Appendix 2, Buildable Land Inventory https://www.oregonmetro.gov/sites/default/files/2018/07/03/UGR_Appendix2_Buildable_Lands_Inventory.pdf

FIGURE 1. STUDY AREA



West Linn BLI: Study Area

- [- - -] West Linn City Limits
- [—] Metro Cities
- [Red Outline] UGB



Date: 11/10/2020
Source: Angelo Planning Group
For Planning Purposes Only

STEP 1 - CONSTRAINTS

Development constraints are factors that temporarily or permanently limit or prevent the use of economic development. Development constraints include, but are not limited to, wetlands and stream corridors (Title 3), environmentally sensitive areas such as habitat (Title 13), slope, topography, infrastructure deficiencies, parcel fragmentation, or natural hazard areas. The first step of the BLI process addresses land constrained by natural resources. Subsequent steps in the BLI removes the constrained acreage from the total area within each tax lot.

NATURAL RESOURCE CONSTRAINTS

Natural resources typically provide beneficial environmental functions or aesthetic enhancements that are necessary to preserve. The preservation of these resources often provides a constraint on the developability of an area. To reflect this, environmental resources are identified in this step and removed in subsequent steps.

The following natural resources were removed from buildable acreage at different rates due to the City allowing limited development in some resource areas. Using the Metro UGR method, the natural resources and their associated removal rates are as follows:

Single-family residential

1. Floodways: 100% removed
2. Floodplain: 100% removed
3. Slopes > 25% and Title 3 treated the same way: 100% removed
4. Title 13: 50% of Title 13 constrained acres removed from BLI (consistent with Title 13 model Ordinance)
5. Assume at least one unit per tax lot, even if fully constrained

Multi-family residential

1. Floodways: 100% removed
2. Floodplain: 50% removed
3. Slopes > 25%: 100% removed
4. Title 3: remove 50% of the constrained land with the other 50% considered buildable
5. Title 13: 15% of Title 13 constrained acres removed from BLI (consistent with Title 13 Model Ordinance)
6. Assume at least one unit per tax lot, even if fully constrained

Note that any given piece of land can have multiple, overlapping constraints. Examples of this includes steep slopes within the floodplain. Portions of resources with less protection/less constrained (e.g. Title 13) are removed from the overlapping area of higher constrained resources (e.g. Floodway). Once overlapping portions are consolidated, the natural resources are overlaid with City tax lots to estimate the amount of land in each parcel where development is limited.

The data for each natural resource constraint is derived from Metro's Regional Land Information System (RLIS). The full constraints, including overlapping portions, are shown on Figure 3.

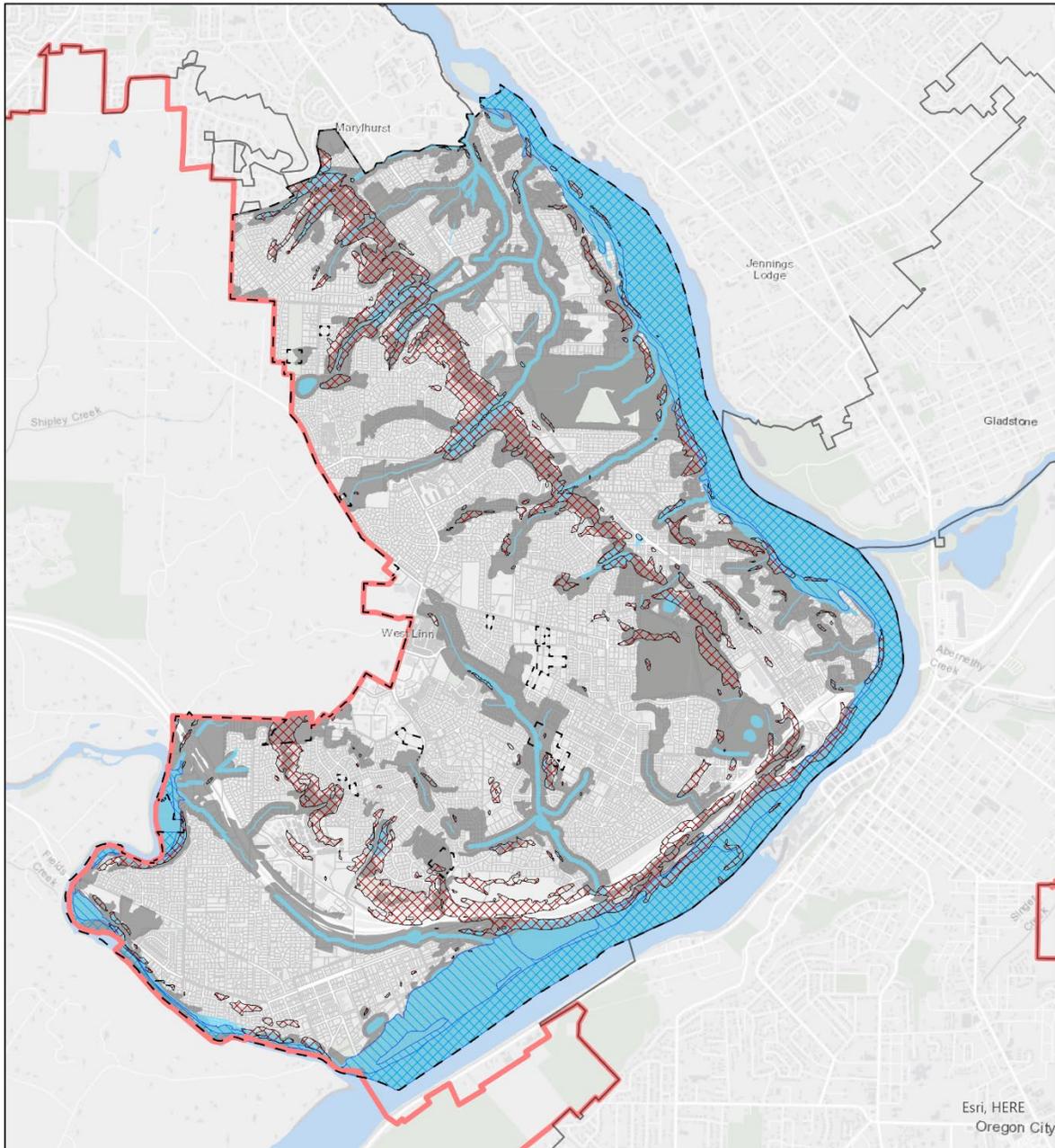
Table 1 summarizes the acreage for each constraint. Note that land can be subject to more than one constraint, as explained earlier. A significant portion of the City's natural resource constraints include Title 13 and Title 3 land, which is largely composed of stream corridors, wetlands, and upland habitat. While much of the City has Title 13 and 3 land, a substantial portion of these areas is still considered buildable, as noted above.

TABLE 1: ENVIRONMENTAL CONSTRAINT SUMMARY

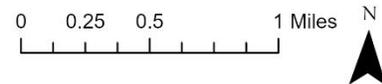
Constraint	Total (acres) *
<i>Total</i>	<i>4,811.4</i>
Steep Slopes	586.4
Floodway	511.9
Floodplain	216.6
Title 3	1,013.6
Title 13	2,482.9

* Note: Total acres does not account for overlap among categories

FIGURE 2. CONSTRAINTS MAP



West Linn BLI: Constraints



Date: 11/10/2020
Source: Angelo Planning Group
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STEP 2 - CLASSIFICATION OF LAND

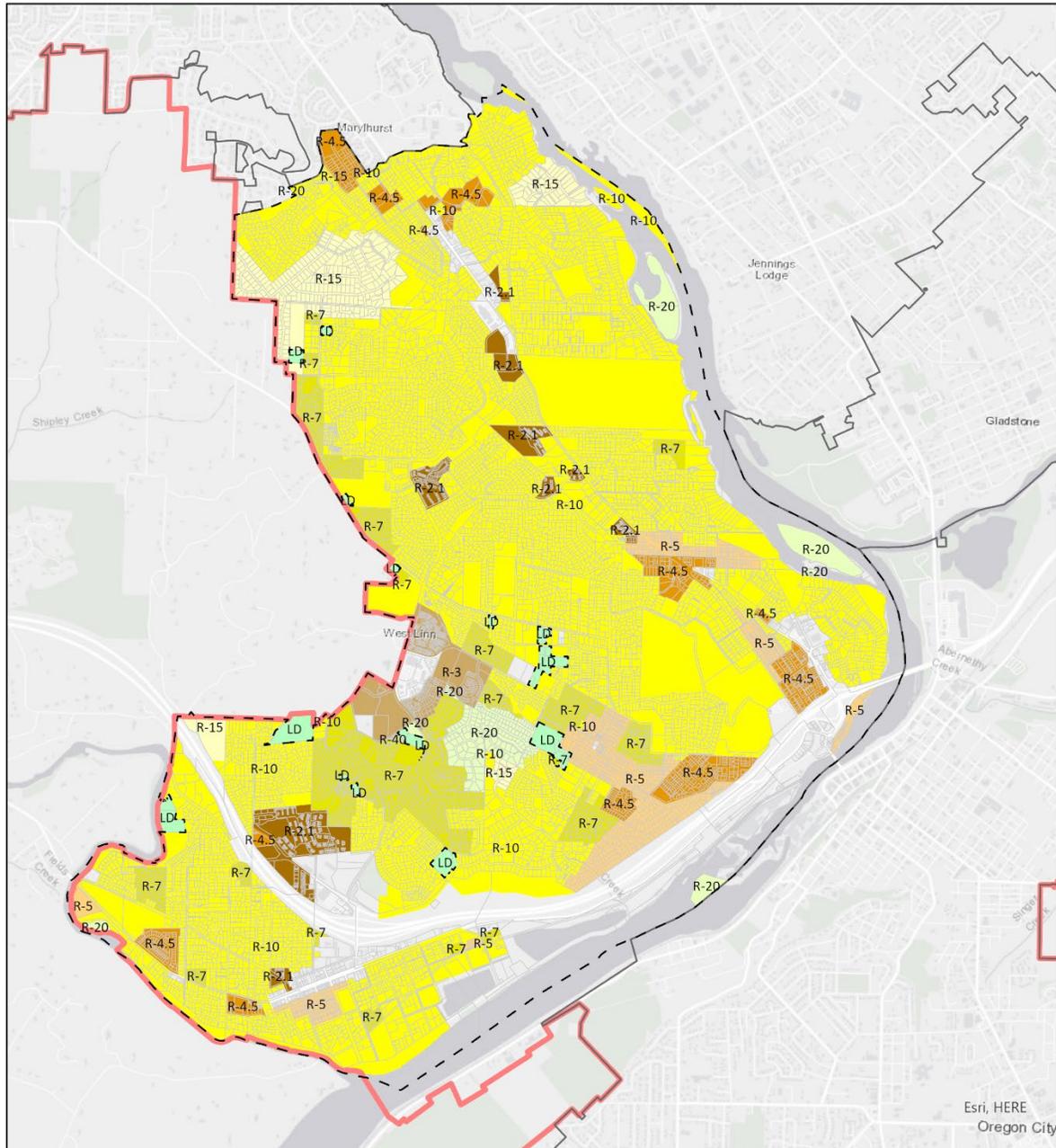
For the purpose of this analysis, residential land is identified as the following:

- Lands identified as a residential zone in the City's Zoning Code. These include:
 - Single-Family Detached (R-40, R-20, R-15, R-10, LD²)
 - Single-Family Detached and Attached/Duplex (R-7, R-5, R-4.5)
 - Single-Family and Multiple-Family (R-3, R-2.1)

Land zoned for other uses (commercial, industrial, open space, etc.) is excluded. Although the City's zoning code allows for limited residential uses in other, non-residential zones, it is not the primary purpose of these zones and there is no guarantee that land so designated will be used for residential purposes. The City's residential zones are shown in Figure 3.

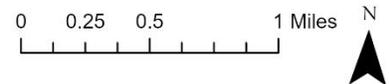
² LD is the City's Low Density Comprehensive Plan designation, which for the purposes of this analysis, only apply to the unincorporated islands within the City that do not yet have a zoning designation.

FIGURE 3: RESIDENTIAL ZONES IN WEST LINN



West Linn BLI: Residential Zones

[- - -] West Linn City Limits	Residential Zone	[Yellow] R-10	[Orange] R-4.5	[Light Green] LD
[Solid] Metro Cities	[Olive] R-40	[Yellow-Green] R-7	[Brown] R-3	
[Red Outline] UGB	[Light Yellow] R-20	[Light Orange] R-5	[Dark Brown] R-2.1	
[Thin Grey] Taxlot	[Yellow] R-15			



Date: 11/10/2020
Source: Angelo Planning Group
 For Planning Purposes Only

Table 2 summarizes the amount of residentially zoned and land that is constrained. There is a total of 3,499 acres of residential land within the City. As shown, R-10 represents a significant portion of all residential land within the City at approximately 2,528 acres (approximately 72% of residential land).

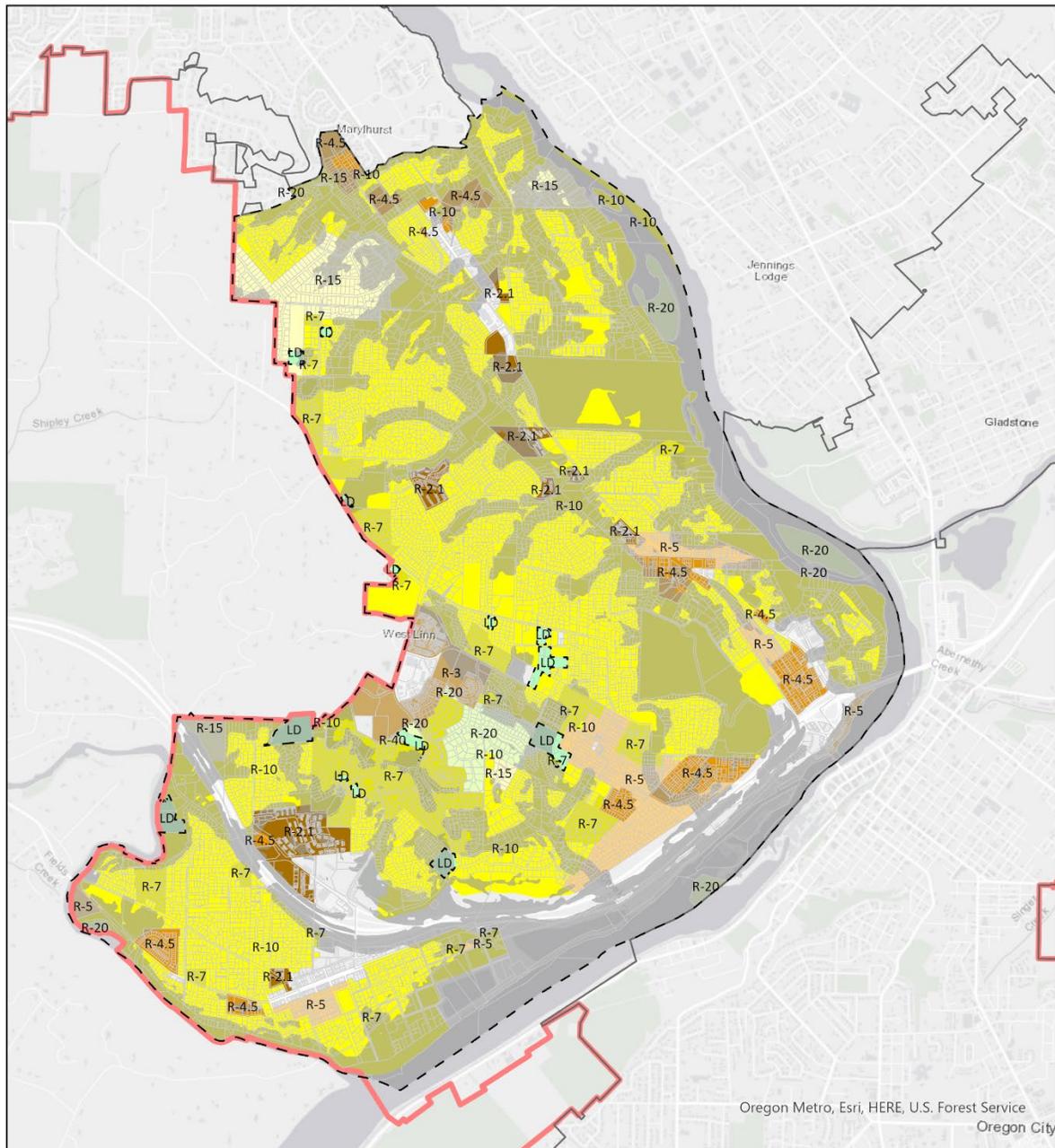
Most zones have a significant amount of natural resource constrained area relative to their total area, with R-20, R-15, R-10, and R-2.1 all showing nearly half their land as constrained. Every residential zone's constrained land represents at least 20% of the zone's entire land base (aside from R-40), while nearly half the City's residential land has some constraint on it (1,701 acres). Note that this table accounts for overlapping constraints, thus includes fewer constrained acres than shown in Table 1.

TABLE 2: GROSS ACREAGE IN RESIDENTIAL LAND INVENTORY

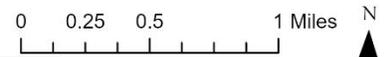
Zone/Comp Plan	Constrained (acres)	Unconstrained (acres)	Total (acres)
R-40	0.0	0.9	0.9
R-20	60.0	43.0	103.0
R-15	80.2	86.4	166.6
R-10	1,344.2	1,184.0	2,528.2
R-7	72.0	193.4	265.4
R-5	33.5	101.9	135.5
R-4.5	56.9	70.5	127.4
R-3	14.7	55.0	69.7
R-2.1	39.7	62.9	102.6
LD	32.9	25.8	58.7
Total	1,734.1	1,823.8	3,557.9

Residential land classifications with constraints overlaid are shown in Figure 4. Consistent with the table and figures above, a substantial portion of constrained appears in R-10 areas, which represents most of the City's residential land overall.

FIGURE 4. RESIDENTIAL ZONES AND CONSTRAINTS



West Linn BLI: Residential Zones and Constraints



West Linn City Limits	Constraints	Residential Zone	R-10	R-3
Metro Cities		R-4.5	R-7	R-2.1
UGB		R-20	R-5	LD
Taxlot		R-15	R-4.5	

Date: 11/10/2020
 Source: Angelo Planning Group
 For Planning Purposes Only

STEP 3 - DEVELOPMENT STATUS

Each residential tax lot within the West Linn city limits has a “development status” of either vacant, infill, committed, or developed. These designations are based on County tax assessor’s data, aerial photography, and staff input. Criteria for these categories follows the Metro UGR methodology and are described below.

DEVELOPMENT STATUS FOR RESIDENTIAL TAX LOTS

- **Vacant** – Vacant tax lots have no existing development, as identified by assessor data or the Metro RLIS Developed GIS layer. Vacant tax lots are identified as follows:
 - Any tax lot that is fully vacant, based on Metro aerial photo.
 - Tax lot with less than 2,000 sq. ft. developed AND developed portion is under 10% of the entire tax lot area.
 - Tax lots that are 95% or more “vacant” from the GIS vacant land inventory.
- **Infill** – These tax lots have existing single-family and meet the following criteria:
 - Lot size threshold > 2.5 times the minimum zoned lot size and less than \$300,000 in improvement/building values.
 - Any parcel that is > 5 times the minimum zones lot size, regardless of property value.
- **Committed** – These properties include parcels in common ownership (e.g., homeowners’ association common areas), are in private and public rights-of-way, and/or are designated or planned for other public facilities (e.g., schools, parks, water treatment facilities, etc.), and are assumed to be unavailable for additional residential uses. They are also properties under 1,000 square feet. The RLIS datasets for schools and Outdoor Recreation and Conservation Areas (ORCA) are the primary datasets used to identify committed parcels.
- **Developed** – Tax lots with this designation are assumed to be fully developed and unavailable for additional uses. Any tax lot that was not previously identified as vacant, infill, or committed was assumed to be developed.³

Table 3 summarizes the number of tax lots within each development status category by the respective zoning designation. As shown in the table, there is an estimated 614 vacant or infill tax lots within the City (approximately 6% of residentially zoned tax lots).

³ Developed lots were assessed for redevelopment in multifamily zones using the Metro UGR methodology. This approach assumes that a total real market property value (RMV) to property area ratio below a certain threshold has a high redevelopment probability. The Metro UGR method uses a \$10/sqft threshold, or “strike price”, for suburban areas, which includes West Linn. There are no multi-family properties in the City that are below the \$10/sqft strike price. Therefore there are no properties in the City that meet “redevelopment” development status criteria.

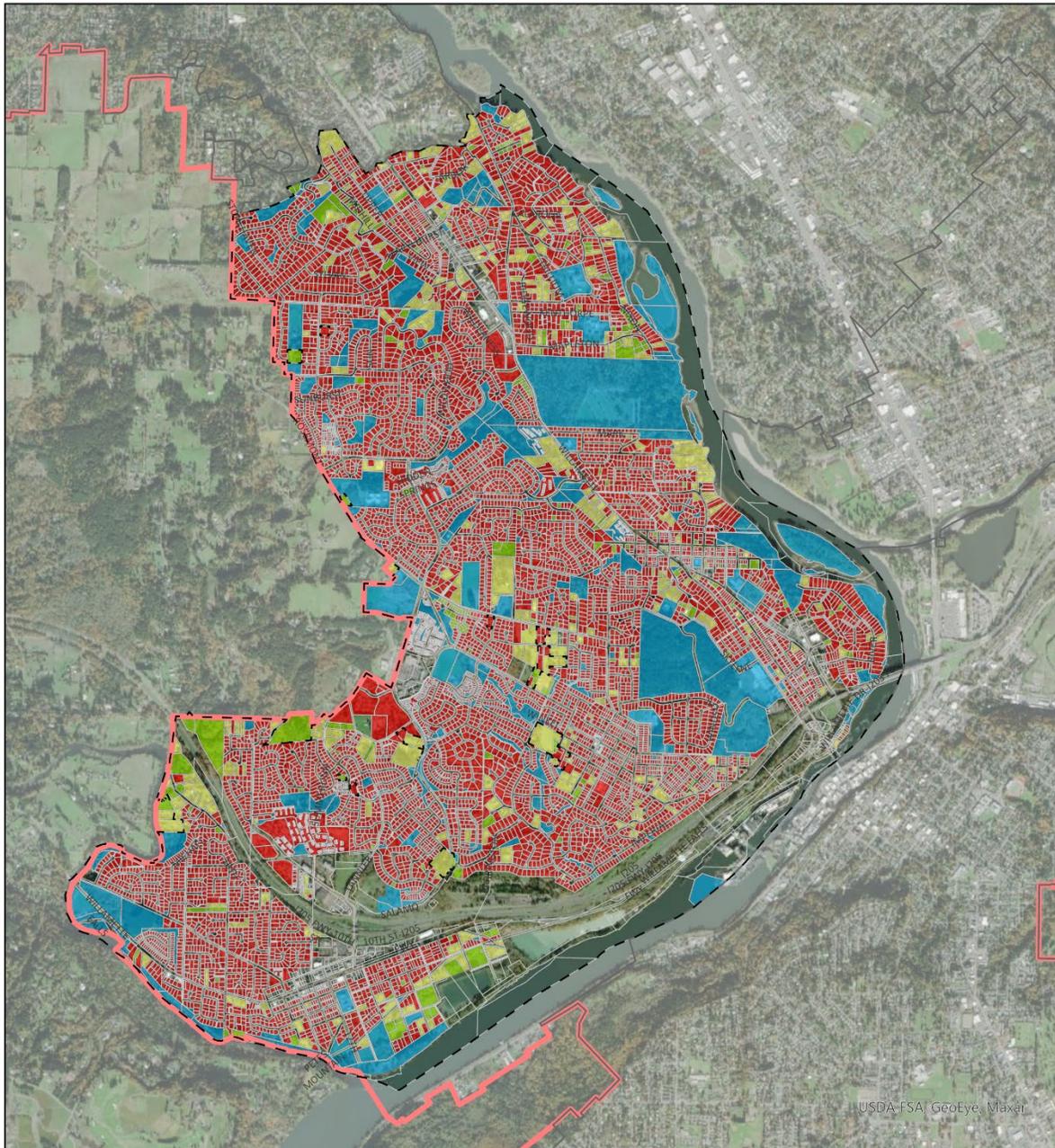
TABLE 3. NUMBER OF TAX LOTS BY DEVELOPMENT STATUS AND ZONE

Zoning/ Comp Plan	Vacant	Infill⁴	Committed	Developed	Grand Total
R-40	--	--	--	1	1
R-20	1	--	15	139	155
R-15	9	5	5	296	315
R-10	219	209	254	5,337	6,019
R-7	17	11	54	1,082	1,164
R-5	31	29	51	615	726
R-4.5	28	31	38	445	542
R-3	--	--	22	312	334
R-2.1	--	5	687	244	936
LD	12	7	--	19	38
Grand Total	317	297	1,126	8,490	10,230

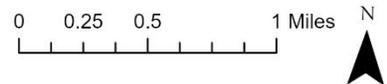
Figure 5 illustrates the location and development status of tax lots within the City. As shown, most of the area is developed throughout the City. New residential development opportunities in the City are sparse, with vacant and infill lots scattered throughout the City and a few small, concentrated pockets of vacant lots along the fringes.

⁴ The infill estimation based on the Metro UGR methodology may overestimate the number of lots that are likely to redevelop or add capacity during the planning period. This BLI analysis identified a number of small lots that fit the Metro UGR infill criteria but that appear to be unlikely to experience additional development within the next 20 years, given the size of the lot, the value of the home, and/or the placement of the existing home on the lot. The Metro UGR criteria applies to the whole region, and therefore may overestimate infill capacity for smaller jurisdictions with less development pressure.

FIGURE 5. DEVELOPMENT STATUS



West Linn BLI: Development Status



Development Status	
West Linn City Limits	Vacant
Metro Cities	Infill
UGB	Committed
Taxlot	Developed

Date: 12/14/2020
Source: Angelo Planning Group
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STEP 4 - DETERMINE DEVELOPMENT CAPACITY

The capacity of developable residential land is estimated based on the City's zoning provisions of the West Linn Development Code. Buildable land is the unconstrained acreage minus the assumed future right-of-way (ROW) dedication to accommodate dwelling units (e.g. streets). Consistent with Metro UGR methods, ROW dedication removal from unconstrained acreage was determined from the following sliding scale:

- Tax lots under 3/8 acre, assume 0% set aside for future streets.
- Tax lots between 3/8 acre and 1 acre, assume a 10% set aside for future streets.
- Tax lots greater than an acre, assume an 18.5% set aside for future streets.

Assumed densities for each zone were determined by the minimum lot sizes shown in Table 4, coupled with data related to the density of previously permitted developments, and an assumption that future densities are likely to be marginally higher based on allowed middle housing types in these zones.

TABLE 4: RESIDENTIAL AREAS, MINIMUM LOT SIZE, AND DENSITY ASSUMPTION

Zone	Minimum Lot Size(s) (square feet)	Density Assumption	Current Density Provisions
Single-Family Detached (R-40)	SFR – 40,000	1.2 DU/acre	1.1 DU/acre
Single-Family Detached (R-20)	SFR – 20,000	2.5 DU/acre	2.18 DU/acre
Single-Family Detached (R-15)	SFR – 15,000	3.5 DU/acre	2.9 DU/acre
Single-Family Detached (R-10)	SFR – 10,000	5 DU/acre	4.35 DU/acre
Single-Family Detached and Attached (R-7)	SFR – 7,000, SFR Attached – 5,500	6.5 DU/acre	6.2 DU/acre
Single-Family Detached and Attached/Duplex (R-5)	SFR – 5,000, SFR Attached – 4,500	9 DU/acre	8.7 DU/acre
Single-Family Attached and Detached Duplex (R-4.5)	SFR – 4,500, SFR Attached – 4,000	10 DU/acre	9.68 DU/acre
Single-Family and Multiple-Family (R-3)	SRR (detached and attached) – 3,000, MFR – 3,000 per unit	14 DU/acre	14.5 DU/acre
Single-Family and Multiple-Family R-2.1	SFR – 4,000, SFR Attached – 2,700, MFR – 2,100	20 DU/acre	20.74 DU/acre
Low Density (LD)	N/A	5 DU/acre	N/A

The housing capacity was estimated by multiplying the assumed density by the estimated buildable acreage for each zone. Additionally, housing capacity for each parcel was rounded to the nearest whole number. Specifically, all parcels with a calculated capacity greater than one unit were rounded down, while those calculated to be less than one unit were rounded up. As previously mentioned, every lot that is fully constrained is assumed to accommodate at least one unit, consistent with Metro UGR methodology. This approach assumes that every vacant or infill parcel can accommodate at least one unit. The buildable acreage is shown in Table 5, and the estimated housing capacity is shown in Table 6. Housing capacity estimates are mapped in Figure 6.

TABLE 5: ESTIMATED BUILDABLE ACRES BY DEVELOPMENT STATUS AND ZONE

Residential Area	Vacant	Infill ⁵	Grand Total
R-40	--	--	--
R-20	0.0	--	0.0
R-15	6.0	1.2	7.2
R-10	30.8	102.9	133.7
R-7	3.5	10.3	13.8
R-5	3.0	9.2	12.2
R-4.5	2.7	10.9	13.6
R-3	--	--	--
R-2.1	--	1.9	1.9
LD	6.8	10.4	17.2
Grand Total	52.8	146.9	199.7

TABLE 6: HOUSING UNIT CAPACITY ESTIMATE AND DENSITY ASSUMPTIONS⁶

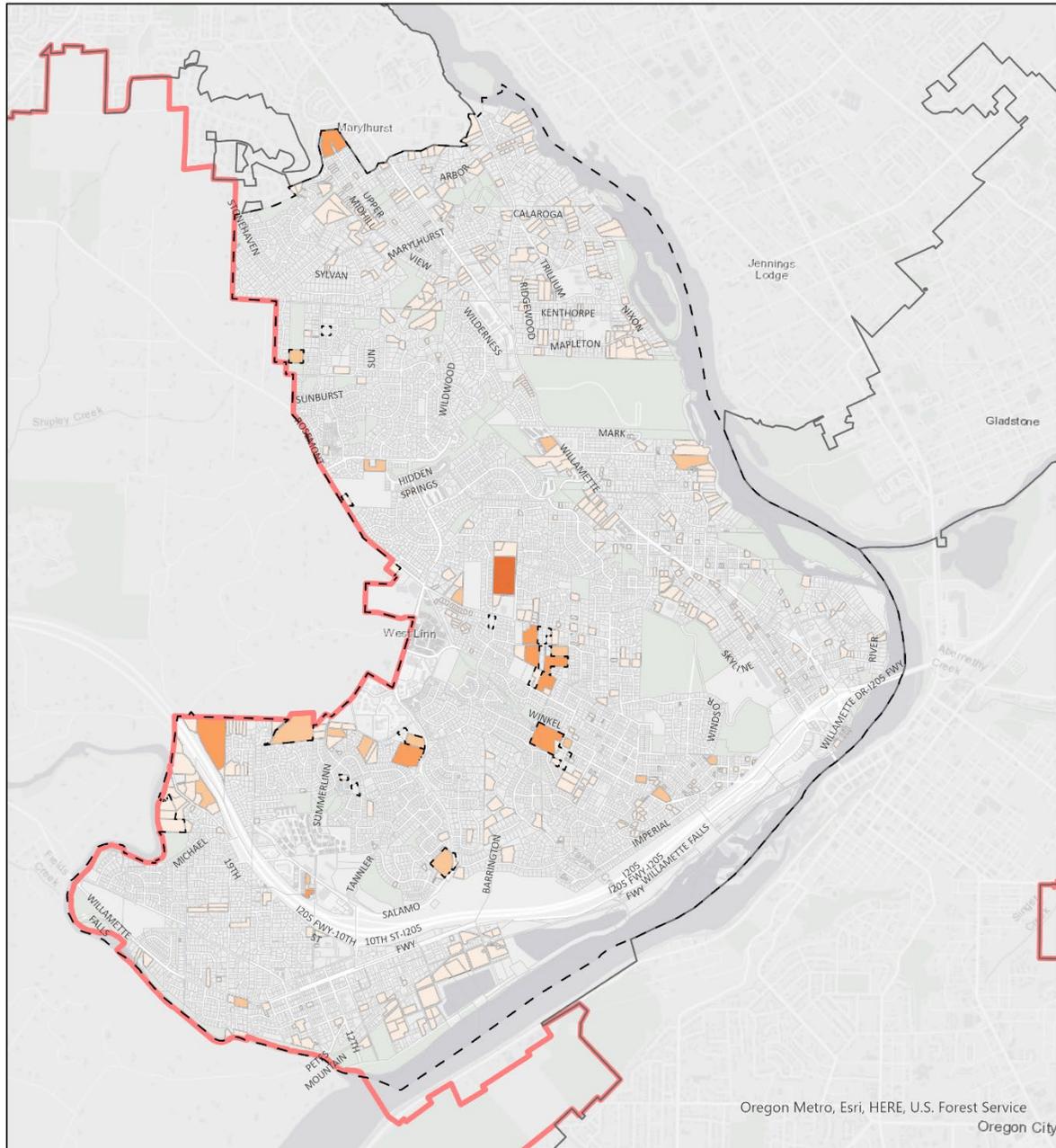
Residential Area	Assumed Density	Vacant	Infill ⁷	Grand Total
R-40	1.2 DU/acre	--	--	--
R-20	2.5 DU/acre	1	--	1
R-15	3.5 DU/acre	25	5	30
R-10	5 DU/acre	254	473	727
R-7	6.5 DU/acre	26	63	89
R-5	9 DU/acre	34	71	105
R-4.5	10 DU/acre	33	101	134
R-3	14 DU/acre	--	--	--
R-2.1	20 DU/acre	--	36	36
LD	5 DU/acre	33	50	83
Grand Total	N/A	406	799	1,205

⁵ See footnote 3 on page 12 regarding potential infill capacity.

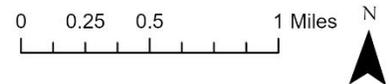
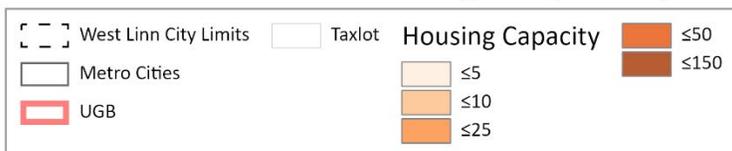
⁶ There are minor discrepancies between some of these figures and the product of multiplying the buildable acreage (Table 5) for some zones with their corresponding assumed density. This is because multiplying each zone's total buildable acreage with its assumed density does not account each parcel's rounding to the nearest whole number, which was discussed in the Step 4 methodology.

⁷ See footnotes 3 and 4.

FIGURE 6: ESTIMATED HOUSING UNIT CAPACITY



West Linn BLI: Housing Capacity



Date: 12/14/2020
Source: Angelo Planning Group
 For Planning Purposes Only

Goal 10 - HOUSING

BACKGROUND AND FINDINGS

Note: The following underlined text will completely replace the existing ~~strikethrough~~ text in this section of the Housing chapter.

Having affordable, quality housing in safe neighborhoods with access to community services is essential for all Oregonians. Like other cities in Oregon, the City of West Linn is responsible for helping to ensure that its residents have access to a variety of housing types that meet the housing needs of households and residents of all incomes, ages and specific needs. Towards that end, the City has undertaken and will continue to implement and update a variety of activities to meet current and future housing needs:

- Conduct and periodically update an analysis of current and future housing conditions and needs. The City most recently conducted this analysis in 2021. The results are summarized in this element of the Comprehensive Plan and described in more detail in a supporting Housing and Residential Land Need Assessment Report.
- Conduct and periodically update an inventory of buildable residential land to ensure that the City has an adequate supply of land zoned for residential use to meet projected future needs. The City most recently conducted this analysis in 2021. The results are summarized in this element of the Comprehensive Plan and described in more detail in a supporting Buildable Lands Inventory Report.
- Adopt a set of amended housing-related Comprehensive Plan policies to address future housing needs and continue to update them, as needed.
- Regularly update and apply regulations in the City's Zoning and Subdivision Ordinances to meet housing needs identified in the Comprehensive Plan and supporting documents.
- Implement additional strategies to address housing needs in partnership with state and county agencies and other housing organizations. Potential strategies are described in more detail in a Housing Strategies Report prepared as part of the Housing Capacity Analysis in 2020-2021.
- Coordinate with Metro and other surrounding jurisdictions regarding future amendments to the Portland Metro area urban growth boundary.

West Linn is a City of 27,420 people (in 2022) located in Clackamas County on the southern edge of the Portland metropolitan area. Based on estimated population, West Linn is the 20th largest city in the state by population, similar in size to other regional cities such as Tualatin, Wilsonville, and Forest Grove. The City has grown by over 3,700 people since 2000 or 17%. As of 2020, the city has an estimated 9,948 households. Since 2000, West Linn has added an estimated 2,200 households. This is an average of roughly 110 households annually during this period. The growth since 2000 has outpaced the growth in new housing units, which have been permitted at the rate of roughly 90 units per year.

There has been a general trend in Oregon and nationwide towards declining household size as birth rates have fallen, more people have chosen to live alone, and the Baby Boomers have become empty

nesters. While this trend of diminishing household size is expected to continue nationwide, there are limits to how far the average can fall. West Linn's average household size of 2.6 people is similar to the Clackamas County average and slightly higher than the statewide average of 2.5.

In addition, between 2000 and 2020, middle age cohorts generally decreased as share of total population, while the share of older residents grew. This is in keeping with the national trend caused by the aging of the Baby Boom generation. Overall, West Linn has a younger population than the county, with a greater share of children, but a smaller share of those aged 25 to 34 years. In 2018, the local median age in West Linn was 42 years old, compared to 38 years old in Oregon. Compared to state and national averages, West Linn has a higher share of households with children. At 16%, the share of population over 65 is similar to the state and national figures. West Linn is a relatively affluent community and its estimated median household typically has been higher than in Clackamas County, and was almost double the statewide median in 2020. In 2020, 53% of households earned more than \$100,000, while only 23% of households earn less than \$50k per year.

Housing is generally one of a household's largest living costs, if not the largest. The ability to find affordable housing options, and even build wealth through ownership, is one of the biggest contributors to helping lower income households save and build wealth. Over 24% of West Linn households pay more than 30% of income towards housing costs (American Community Survey 2018). Households with lower incomes tend to spend more than 30% of their income on housing, while incrementally fewer of those in higher income groups spend more than 30% of their incomes on housing costs.

Even if renting, lower housing costs allow for more household income to be put to other needs, including saving. Renters have disproportionately lower incomes relative to homeowners. Housing cost burdens are felt more broadly for these households. West Linn has an income distribution skewed towards higher income levels, there are relatively few households in these lower income segments, compared to most other cities, however, there is still a need for more affordable rental units in West Linn, as in most communities.

West Linn had a housing vacancy rate of 5% (includes ownership and rental units) in 2020. The housing stock increased by roughly 20% between 2000 and 2020. West Linn had a much greater share of homeowner households than renter households. The 2018 American Community Survey estimates that 79% of occupied units were owner occupied, and only 21% renter occupied. The ownership rate has held steady since 2000 (78%). This is significantly higher than the estimated ownership rate across Clackamas County (69%) and statewide (61%).

A large share of owner-occupied units (90%) are detached homes, which is related to why owner-occupied units tend to have more bedrooms, compared to other community averages. Renter-occupied units are much more distributed among a range of structure types. About 32% of rented units are estimated to be detached homes or manufactured homes, while the remainder are some form of attached unit. An estimated 29% of rental units are in larger apartment complexes.

The future housing needs projection shows a need for 1,005 new housing units by 2040, which is less than the estimated total housing capacity of 1,205 units. Of the new units needed, roughly 68% are projected to be ownership units, while 32% are projected to be rental units. This represents more renters than the estimated tenure split, but it is projected that more rental units will need to be added to balance the larger share of ownership units in the current inventory.

While cities typically do not directly provide housing, they can influence a number of factors that impact the availability of housing. These can include the supply of available residential land; the availability of public services; development regulations (density and design), and support for low and moderate income housing through funding or incentives. The City also can assist in providing information to non-profit and private developers about housing opportunity sites, state and federal funding opportunities and design and development practices that promote construction of accessible, sustainable, attractive and affordable housing.

In the Portland metropolitan region, only land included in the Metro Urban Growth Boundary (UGB), an invisible line that separates resource land from presently developable areas, can be developed at residential densities requiring urban services. At the local level, each county and city must inventory its buildable land, which is defined as vacant and re-developable land suitable for residential use, to determine housing capacity. West Linn updated its buildable land inventory in 2020. Buildable land supply in West Linn shows ample capacity for low-density housing, and medium-density housing, while the amount of land zoned for “high-density housing” is insufficient for the projected demand for high-density housing types. There is a projected deficit of 5 acres of land in this zone to accommodate the forecasted number of multi-family apartment units. The City will need to undertake steps to address this deficiency as a follow-up measure to adopting amendments to this Comprehensive Plan chapter.

In addition, given the shortage of High-density Residential-zoned land in West Linn and recent changes to Development Code provisions, it becomes more likely that available land in lower-density zones may be developed with attached forms of housing, as other lands to accommodate these units is scarce. At the same time, there is capacity in the Medium Density Residential zones to accommodate demand for most of the attached types.

- A number of state and regional policies also affect how West Linn plans for and encourages the production of housing. These include:
- House Bill 2003, passed in 2021, and related administrative rules requiring West Linn and other cities in the Portland Metro region to update their Housing Needs Analyses and adopt Housing Production Strategies every six years. Several other recent legislative actions related to housing allowed in commercial areas, conversion of motels to temporary housing, required density bonuses for affordable housing projects, and others also will affect the City’s approach to regulating specific types of housing.
- The Metro Urban Growth Management Functional Plan which also requires cities in the Metro area to determine its housing capacity and adopt minimum density requirements. West Linn must require that new developments be built at densities that are at least 80% of the maximum density allowed.

House Bill 2001 (HB2001, 2019) and associated administrative rules require West Linn and other Metro-area cities to allow for additional housing types in low-density residential zones and the City already has adopted amendments to its Community Development Code to do this. This includes attached single-family homes (townhomes), duplex-to-fourplex, and compact small-unit “cottage cluster” developments. These amendments will increase the variety of housing that can be developed throughout the City. They also affect compliance with related state rules and regulations.

Residential housing is the predominant land use in West Linn. Through the City's planning process, policies and programs are developed to maintain the existing housing stock and allocate vacant lands for future housing development. City policies and programs must also address a variety of issues, including:

- housing type, location, and density;
- affordability;
- housing for low and moderate income householders and housing for elderly and handicapped residents;
- housing rehabilitation;
- compatibility of new housing with existing land uses;
- functional and aesthetic design of multi-family developments;
- providing the opportunity for manufactured housing;
- preservation of historically significant residential structures; and,
- plan review costs.

The amount of housing needed in the City is directly related to the City's current and expected future population and the characteristics of its residents. As of July 1, 1999, the population of West Linn was 22,835. By the year 2017, the population is expected to grow to approximately 31,723, assuming 2.65 persons per household. The City will meet Metro's target of 3,226 new units in the time period between 1995 to 2017. During the five-year period of January 1995 to January 2000, 1,542 permits for new housing units were issued. As of January 2000, another 670 units were in the process of being approved and another 2,241 units could be accommodated on vacant or infill land. This equates to a buildout total of 11,971 units. This represents an average annual growth rate of approximately 1.8%. The City has enough land within the City limits and the remaining West Linn Planning Area (including areas within the Urban Growth Boundary, and contiguous to, but not within City limits) to accommodate this growth and to provide for a range of housing types, at a variety of price levels, and with a suitable mix of multi-family and single-family housing.

The number of housing units assumes development of buildable, vacant land at planned densities allowed by current zoning, as well as infill development on selected parcels that are partially vacant, and construction of some accessory dwelling units (Figure 10-1, p. H-6). Property constrained by steep slopes, located in the flood plain, and needed for roads or other public infrastructure is not included in the inventory of buildable land. Additional new units could be added to the forecast assuming codes are changed to allow for accessory dwelling units and plan policies encouraging greater redevelopment in community interest areas are implemented. Approximately 135 units would be reasonably accommodated as accessory dwelling units (i.e., small dwellings, typically for a single person attached, or in close proximity to, and on the same lot as an existing house). Another 200 units also could be expected through redevelopment. West Linn has average population characteristics reflective of a middle class, suburban, predominantly white, upper middle income community. Average education levels are above the norm for the region, with over 80% of residents in 2000 having at least some college education (compared to just under 65% in the region). There are few minority residents in West Linn (less than 5% in 2000). West Linn has a high proportion of married couple households, with few female headed and non-related households. West Linn's median household income in 2000 was \$72,010 (compared to \$53,700 in the region). Per capita

income for West Linn residents was \$20,168 in 1990 (compared to \$15,286 in the region). Approximately 3.2 percent of all families in West Linn had incomes below the poverty level in 1990 (compared to 7.1 percent in the region). Of these poor households, 73 were single female-headed households; 12 were single male-headed households, and 77 were families with two parents.

The household size of 3.2 people per family in 1970 has dropped to 2.9 in 1980, remained at this level through 1990, and dropped again to 2.7 in 2000. Regionally, the average household size is expected to decrease further to 2.6 by the year 2017. However, the ratio is expected to remain relatively constant in West Linn, given West Linn's typical family structure (i.e., a large proportion of married households with children and relatively few female-headed and nonrelated households). The percentage of owner-occupied units decreased from 80 percent in 1970 to 78 percent in 2000. This gradual shift from owner-occupied housing to renter-occupied housing is expected to continue. The percentage of single-family and multi-family housing units changed from 86% and 14%, respectively, in 1990, to 80% and 20% in 1999. From 1991 to 1998, 35% of all units constructed were multi-family.

Housing values in West Linn are comparable to other middle-class suburban communities, though significantly higher than the regional average, with a median housing sales price of \$259,900 in 1999 (compared to a regional average of approximately \$144,000). For multi-family units, the median rent is higher in West Linn than in the region, though the difference is not as great as for single-family homes.

Housing affordability is an issue in West Linn. Affordable housing is defined as housing that is affordable to the majority of a city's residents—i.e., housing payments do not exceed 30% of a family's gross income. As noted above, West Linn has a higher median family income than the rest of the region. However, in 1990, 26 percent of families in the City paid more than 30% of their income for housing (including 47% of all renters and 20% of all homeowners). In 2000 this number remained at 26% (including 34% of renters and 24% of homeowners).

The housing element recognizes the value of historic district structures and landmarks. The Willamette Historic District area includes the early subdivision platted in Linn City. It includes small businesses and Victorian and bungalow styled homes built between 1890 and 1920. Today, Willamette remains a pleasant neighborhood with streets lined with picket fences, intricate architectural details, bay windows, decorative gables, wrap-around porches, and steeply-pitched roofs to remind residents and visitors of Willamette's heritage. A number of homes in this neighborhood, and elsewhere in the City, have been designated as historic landmarks.

In 2000, the disabled population in West Linn accounted for approximately nine percent of the total population (representing an increase from six percent in the 1980 and 1990 censuses). This includes people who have physical, mental, or developmental disabilities. Some special services for the disabled and residential care facilities are located in the City and a wide range of regional programs and services also are available to residents of West Linn through county agencies in Oregon City, Gladstone, and Marylhurst.

In 2000, the senior population of West Linn over 65 years of age accounted for 7.7% of the total city population. This percentage has increased from the 6.2% figure recorded in the 1980 census.

GOALS, POLICIES, AND RECOMMENDED ACTION MEASURES

Goals, Policies, and Recommended Action Measures are to address the housing needs identified in West Linn. In addition to ensuring consistency with regional, state and federal requirements, these aim to support partnerships among housing providers and stakeholders in West Linn and to promote opportunities for a wide range of housing choices, efficient land use, and development of housing affordable to people with low and moderate incomes.

Goals¹

1. Preserve and provide a high level of residential livability while also considering the character and identity of established neighborhoods and in balance with other local goals, as well as state and regional requirements
2. Assure good functional and aesthetic design of ~~multi-family and clustered single-family~~ all residential developments.
3. Provide opportunities for a variety of housing types at a range of price levels to accommodate the diverse housing needs of current and future residents.
- ~~34.~~ Encourage the development of affordable housing for West Linn residents of all income levels, especially including for low- and moderate-income households.

Policies

1. Support Statewide Planning Goal 10 by ensuring for the availability of adequate numbers of needed housing units.
2. Ensure ~~that~~ the Comprehensive Plan and Community Development Code ~~are~~ is consistent with federal, state, and regional housing rules and policies. LCDC's Metropolitan Housing regulations.
3. Provide the opportunity for development of detached and attached single-family units, duplexes, ~~triplexes, quadplexes,~~ cottage clusters, garden apartments, town houses, row houses, multiplex units and boarding houses, lodging or rooming houses, and manufactured housing.
4. Provide the opportunity for a wider range of rental and ownership housing choices in West Linn.

¹ Potential amendments to existing (May 2021) Comprehensive Plan Goals, Policies and Action Measures are shown in underline/strikethrough format.

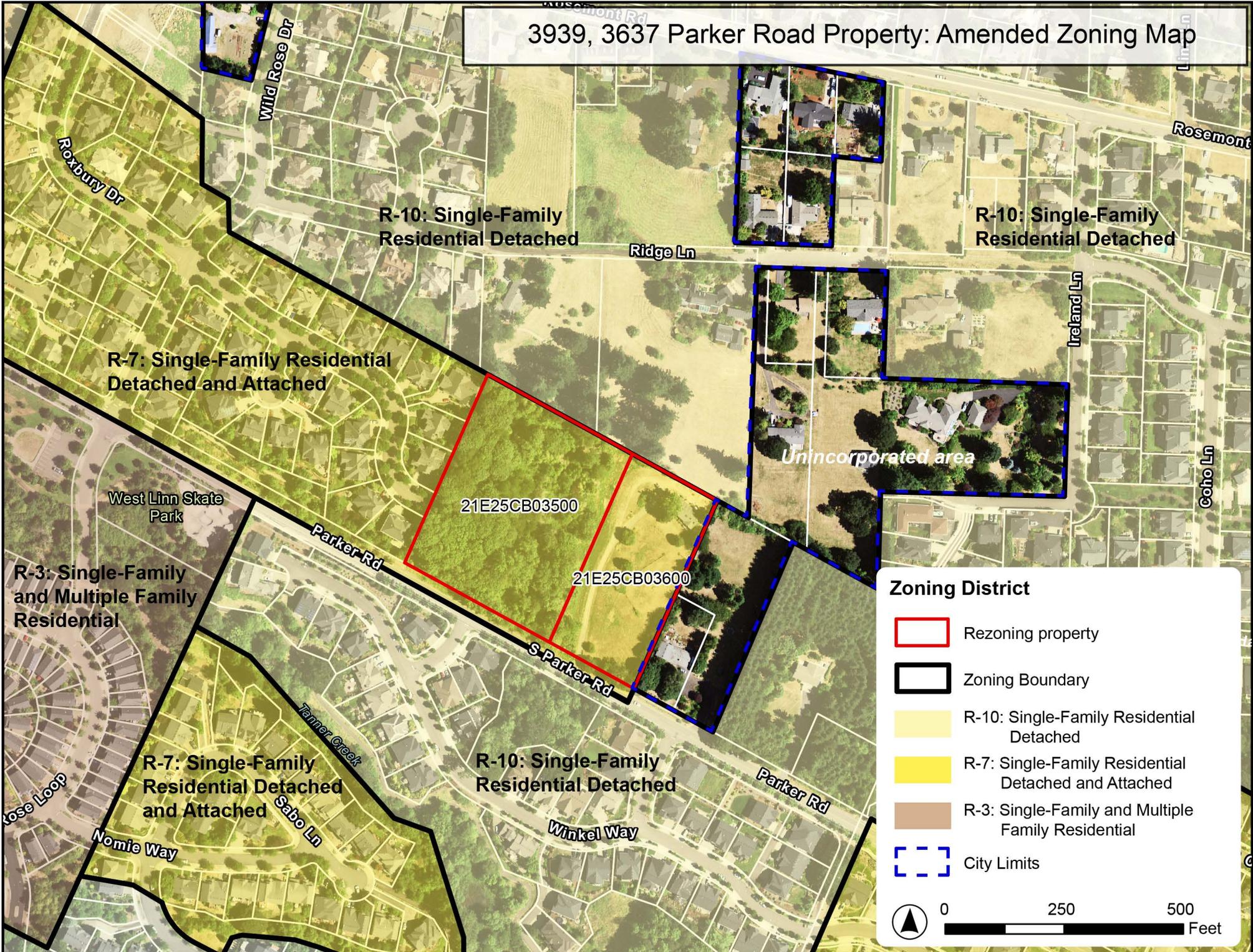
5. Allow manufactured housing, subject to state building code requirements, in all residential zones.
6. Require design review approval for all multi-family developments and manufactured home parks.
7. Allow for flexibility in lot design, size, and building placement to promote housing variety and protection of natural resources.
8. Allow accessory dwelling units, subject to City development and building regulations, in all residential zones.
9. Preserve and enhance, through design review, the Historic District in Willamette and landmark structures throughout the City.
10. Adhere to clear and objective standards to promote timely and predictable plan review.
- ~~11. Encourage new housing to incorporate the following design elements (except in the case of infill lots, where existing patterns shall take precedence):~~
 - ~~a. Location of garages behind the primary building line of a house, side loading garages, or garages in the rear; and,~~
 - ~~b. Provisions for front porches.~~
12. Encourage use of energy efficient building materials and practices in the design, construction, and remodeling of housing.
13. Encourage installation of fire prevention equipment, such as sprinklers, in new developments and implement sprinkler requirements for multi-family construction.
14. Continue to maintain and expand partnerships with non-profit housing developers and other affordable housing providers and agencies that preserve or provide new low- to moderate-income housing units, create opportunities for first-time homeownership, and help vulnerable homeowners stay in their homes.
15. Work with other jurisdictions, Clackamas County, Metro, and the State to identify the region's housing needs and pursue a shared approach to improve housing affordability across all household income ranges.
16. Encourage residential uses mixed with other compatible uses in the same building or on the same site within the City's mixed-use zones.
17. Employ strategies that support the Fair Housing Act and affirmatively further fair housing.
18. The City shall prepare, regularly monitor, and periodically update an inventory of buildable residential land.

19. Encourage maintenance and rehabilitation of the existing housing stock and support local or regional programs that help provide funding for this purpose.

Recommended Action Measures

1. Evaluate how West Linn can meet its share of the regional need for affordable housing.
2. Identify ~~constitutionally justifiable~~ measures, policies and programs to encourage the development provision of affordable housing projects.
3. Determine costs of providing or subsidizing affordable housing. ~~Consider citizen referendum on whether the City should be subsidizing “affordable housing.” A referendum could be a non-binding advisory vote.~~
3. Regularly update the City’s buildable land inventory.
4. Complete a Housing Production Strategy and regularly update the strategy to address community need and priorities.
5. Review the City’s System Development Charges (SDC) structure and consider tiered fees based on home size and affordability targets.
6. Coordinate with the Housing Authority of Clackamas County, private non-profit housing providers, and other federal, state, and regional agencies for the provision of affordable housing programs.
7. Encourage the development of affordable housing when opportunities arise to redevelop publicly owned properties.
8. Engage West Linn residents in public policy decisions, programs, and projects to improve neighborhood quality of life.
9. Evaluate policies and programs, such as density transfers and allowance of smaller lot sizes, to protect natural areas and significant trees and tree groves.

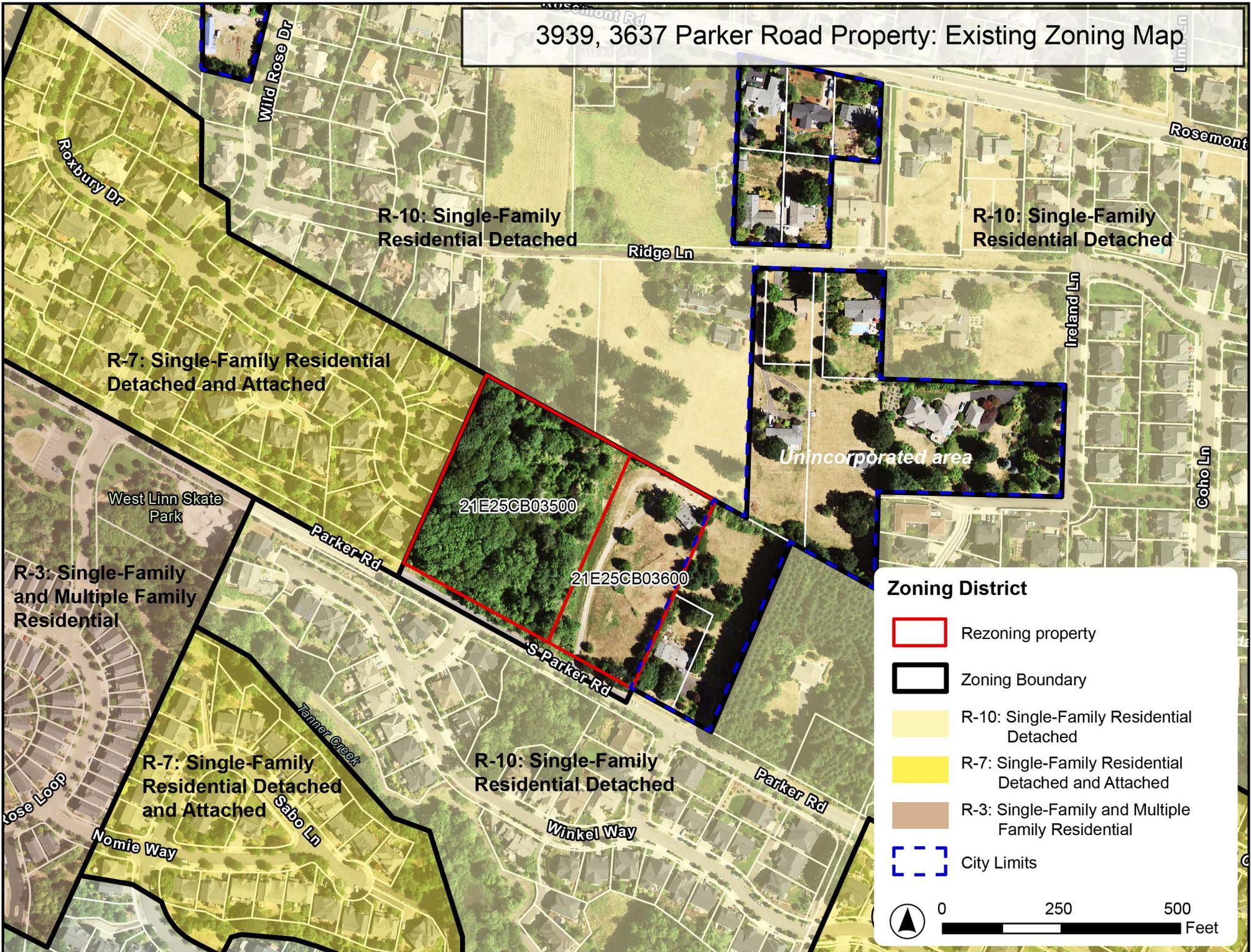
3939, 3637 Parker Road Property: Amended Zoning Map



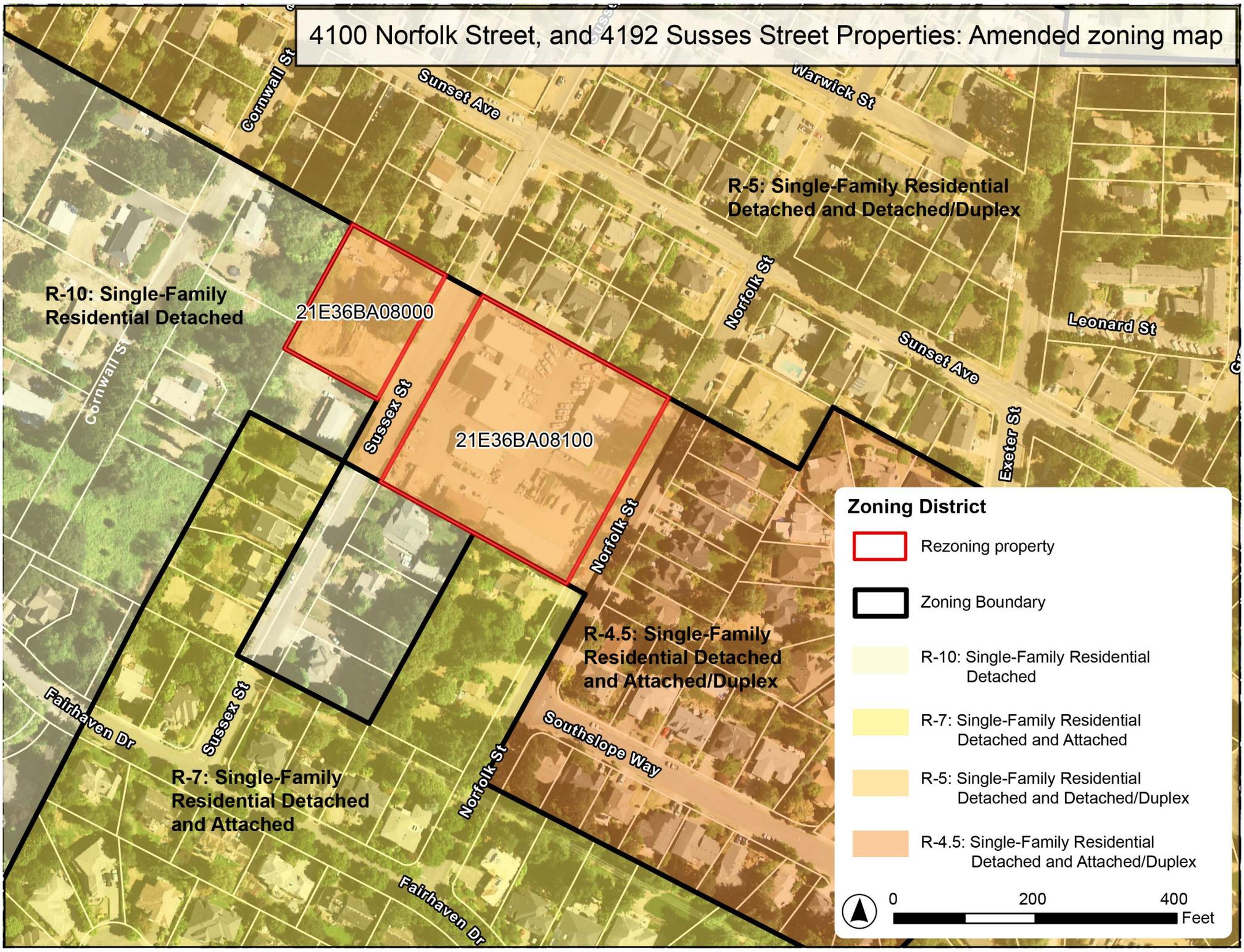
Zoning District

-  Rezoning property
 -  Zoning Boundary
 -  R-10: Single-Family Residential Detached
 -  R-7: Single-Family Residential Detached and Attached
 -  R-3: Single-Family and Multiple Family Residential
 -  City Limits
- 0 250 500 Feet

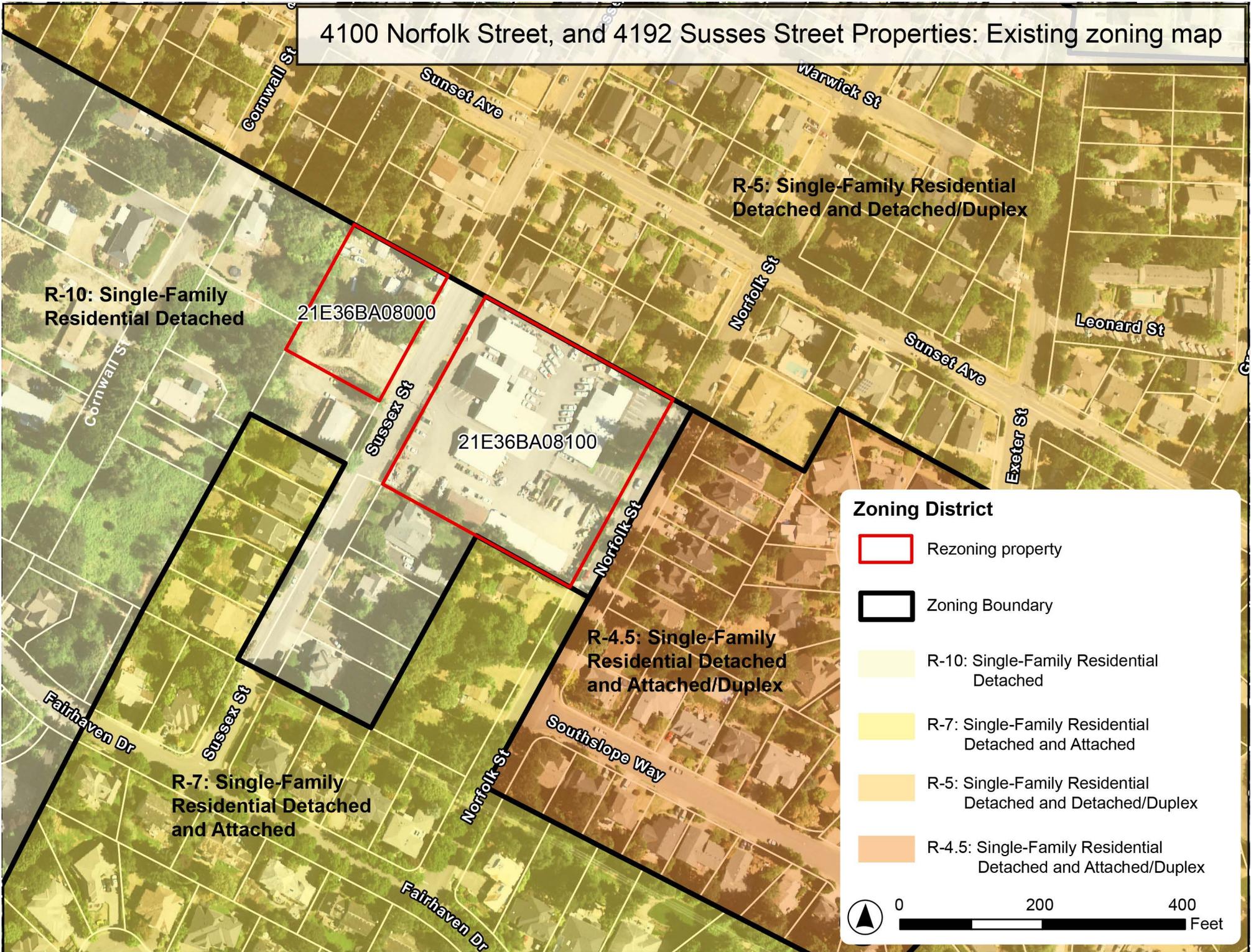
3939, 3637 Parker Road Property: Existing Zoning Map



4100 Norfolk Street, and 4192 Susses Street Properties: Amended zoning map



4100 Norfolk Street, and 4192 Susses Street Properties: Existing zoning map



1200 Tamarisk Drive Property: Amended Zoning Map

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00700

R-2.1: Single-Family
and Multiple Family
Residential

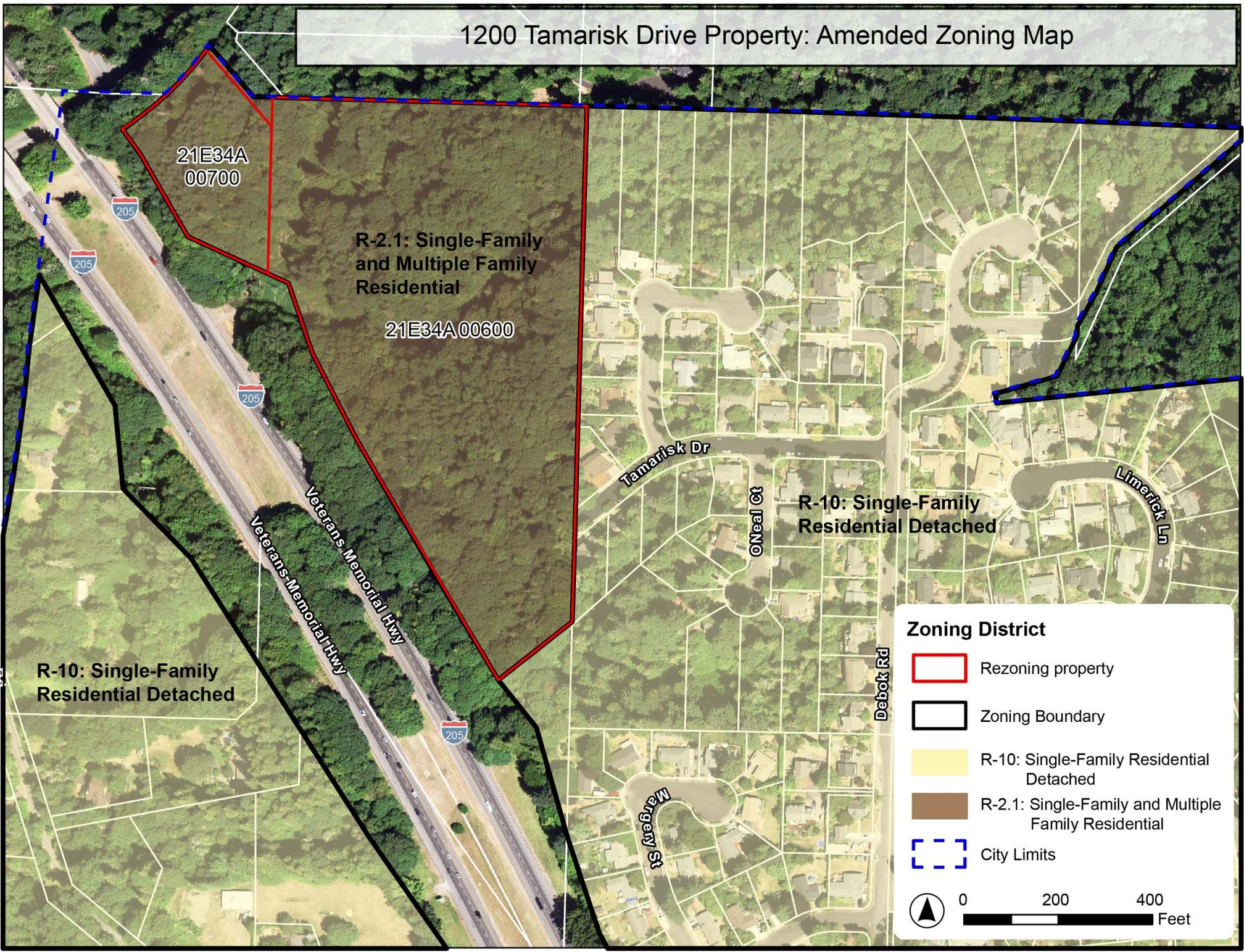
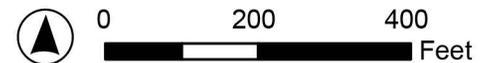
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R-10: Single-Family
Residential Detached

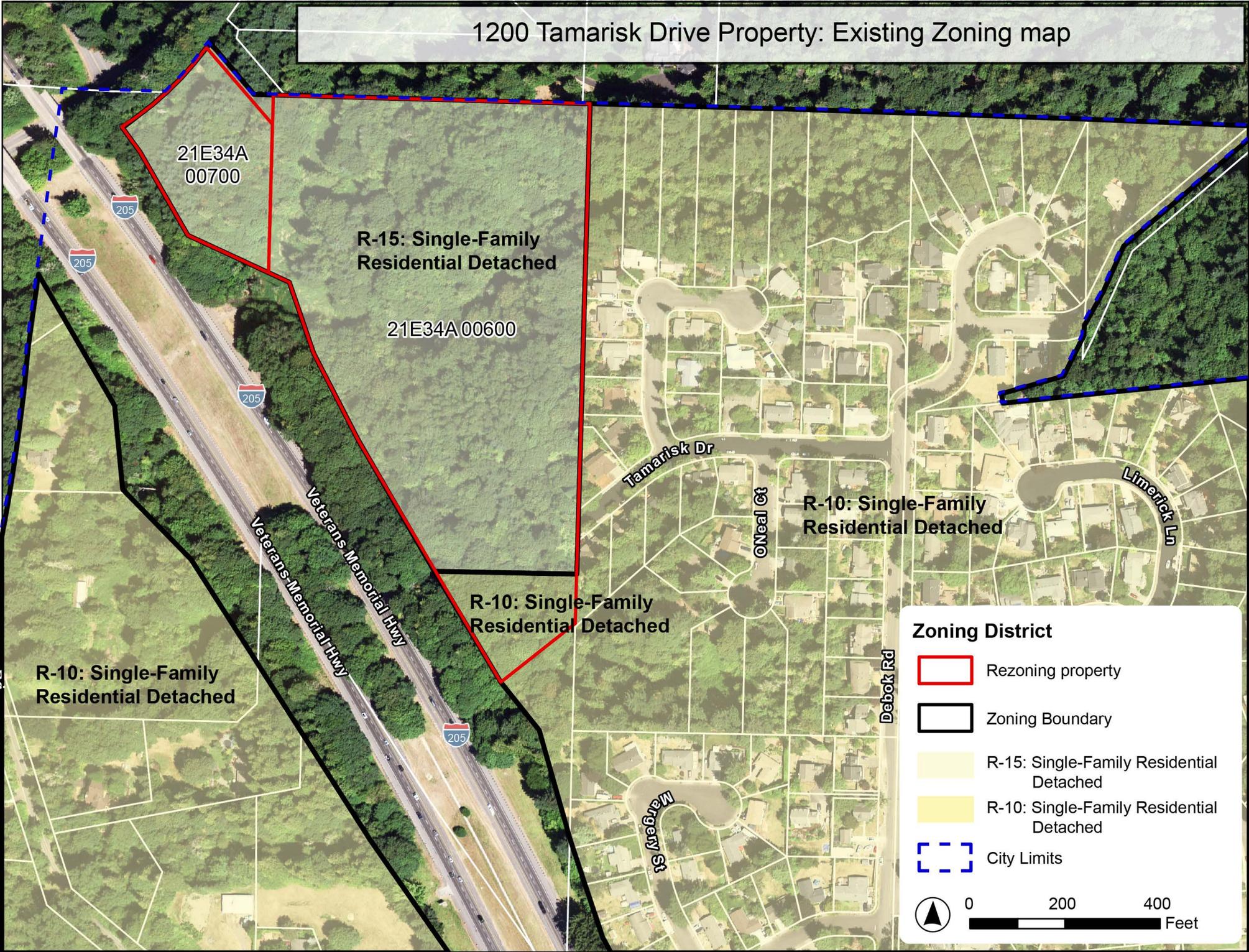
R-10: Single-Family
Residential Detached

Zoning District

-  Rezoning property
-  Zoning Boundary
-  R-10: Single-Family Residential Detached
-  R-2.1: Single-Family and Multiple Family Residential
-  City Limits

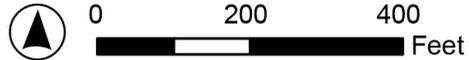


1200 Tamarisk Drive Property: Existing Zoning map

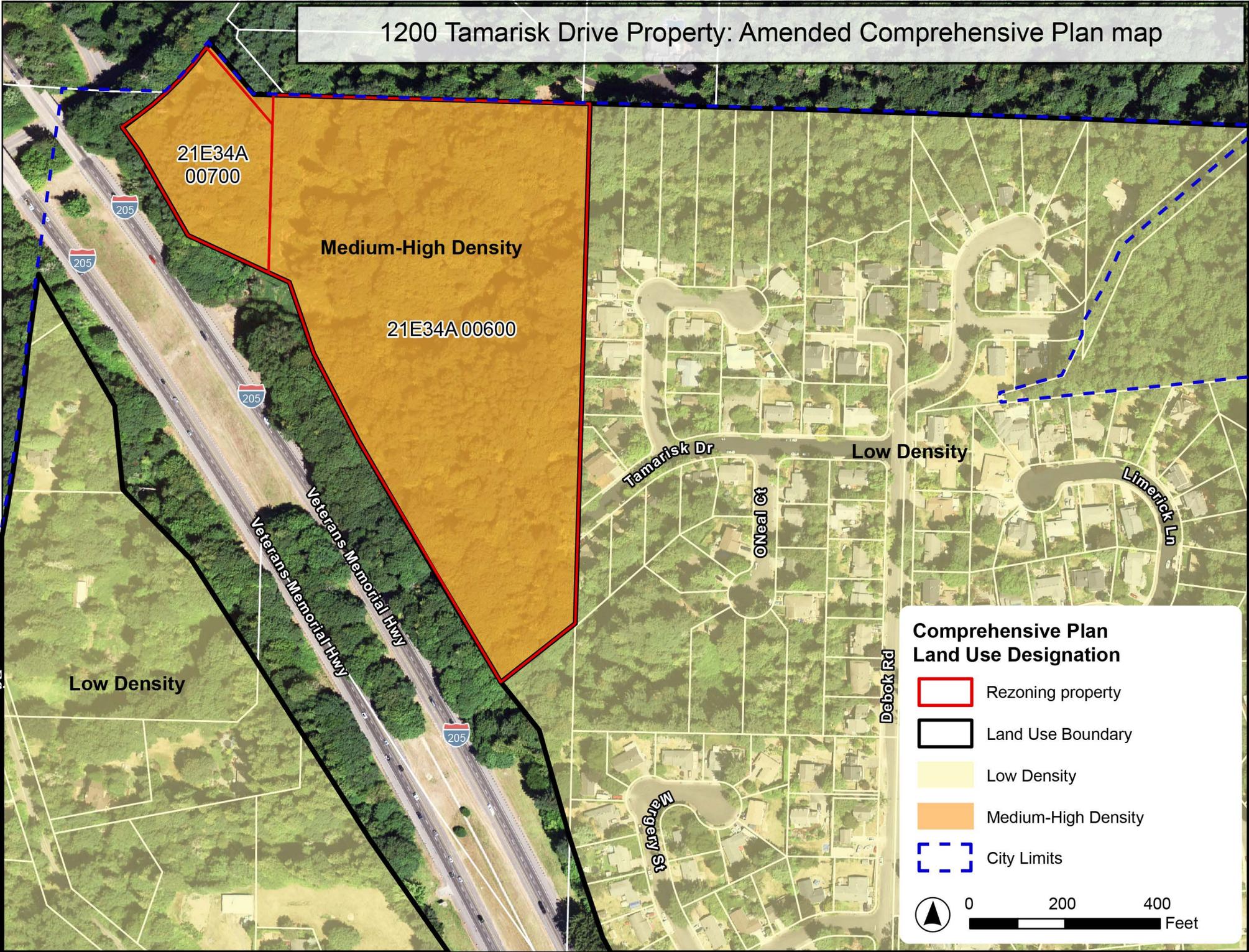


Zoning District

-  Rezoning property
-  Zoning Boundary
-  R-15: Single-Family Residential Detached
-  R-10: Single-Family Residential Detached
-  City Limits



1200 Tamarisk Drive Property: Amended Comprehensive Plan map



1200 Tamarisk Drive Property: Existing Comprehensive Plan map

