Why is Keizer doing a Housing Needs Analysis?

- How much growth in 20-years?
- How much land?
- Where is the buildable land?
  - Vacant; unconstrained physically or by policy
- What development patterns make sense?
- Does Keizer have enough buildable residential land?
Statewide Planning Goal 10 - Housing

“Buildable lands for residential use shall be inventoried and plans shall encourage the availability of adequate numbers of needed housing units at price ranges and rent levels which are commensurate with the financial capabilities of Oregon households and allow for flexibility of housing location, type and density.”
Needed Housing Types (ORS 197.303)

- Housing that includes, but is not limited to, attached and detached single-family housing and multiple family housing for both owner and renter occupancy;

- Government assisted housing;

- Mobile home or manufactured dwelling parks;

- Manufactured homes on individual lots planned and zoned; and

- Housing for farmworkers.
Steps in the HNA/BLI

1. Project the number of new housing units needed in the next 20 years

2. Review relevant national, state, and local demographic and economic trends and factors that may affect housing mix

3. Describe the demographic characteristics of the population, and, household trends that relate to demand for different types of housing

4. Determine the types of housing that are likely to be affordable to the projected households based on household income

5. Estimate the number of additional needed units by structure type

6. Determine the needed density ranges for each plan designation and the average needed net density for all structure types
# Outline of the Housing Needs Analysis Document

<table>
<thead>
<tr>
<th>Chapter</th>
<th>Review Timeline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chapter 1. Introduction</td>
<td>PAC 4</td>
</tr>
<tr>
<td>Chapter 2. Residential Buildable Lands Inventory</td>
<td>PAC 2</td>
</tr>
<tr>
<td>Chapter 3. Historical and Recent Development Trends</td>
<td>PAC 1</td>
</tr>
<tr>
<td>Chapter 4. Demographic and Other Factors Affecting Residential Development in Keizer</td>
<td>PAC 1</td>
</tr>
<tr>
<td>Chapter 5. Housing Needs in Keizer</td>
<td>PAC 1, PAC 3</td>
</tr>
<tr>
<td>Chapter 6. Residential Land Sufficiency within Keizer</td>
<td>PAC 3, PAC 4</td>
</tr>
</tbody>
</table>
Process Overview
Project Advisory Committee Role

- Provide feedback on trends and site needs memo, buildable lands inventory, and final HNA document
- Provide local context
- Assist in facilitating discussion at public meeting
Task 1 Kickoff
- Conference call with staff
- Summary of Major Tasks/Actions
- Proposed Project Schedule
- Project Charter Memorandum
- Public Involvement Strategy Memorandum

Task 2 Housing Needs Projection
- Establish revised population assumptions for Keizer share of UGB
- Draft Housing Needs Projection Memorandum of Population Projections based on meeting
- PAC meeting 1 (PPT, materials, notes)

Task 3 Buildable Lands Inventory
- Draft Buildable Lands Inventory
- PAC meeting 2 (PPT, materials, notes)
- Open House/Workshop #1 (Materials, notes)

Task 4 Residential Land Needs Analysis
- Draft Residential Land Needs Analysis
- Revision of Housing Needs Projection and Buildable Lands Inventory
- PAC meeting 3 (PPT, materials, notes)

Task 5 Recommended Measures to Facilitate Housing Affordability
- Options for changes to City's comp plan and land use regulations
- Draft Housing Needs Analysis
- PAC meeting 4 (PPT, materials, notes)
- Open House/Workshop #2 (Materials, notes)
- PAC meeting 5 (PPT, materials, notes) - Optional
- Final hearings-ready Housing Needs Analysis

Legend:
- Advisory Committee Meeting
- Open House/Workshop
- Staff Meetings
- Interim Deliverables (ECO sends drafts to staff)
- Deliverable (DLCD Deadline)
## PAC Meeting Dates and Topics

<table>
<thead>
<tr>
<th>PAC</th>
<th>Date</th>
<th>Topic(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAC 1</td>
<td>Jan 14</td>
<td>Discuss framework and methodology for the Housing Needs Analysis, housing market trends, housing projection</td>
</tr>
<tr>
<td>PAC 2</td>
<td>Feb 20</td>
<td>Discuss draft results of buildable lands inventory, begin to discuss housing policies</td>
</tr>
<tr>
<td>PAC 3</td>
<td>Mar 25</td>
<td>Discuss housing needs, discuss housing policies</td>
</tr>
<tr>
<td>PAC 4</td>
<td>Apr 22</td>
<td>Revisit residential land sufficiency, discuss housing policies</td>
</tr>
<tr>
<td>PAC 5</td>
<td>May 29</td>
<td>Refine housing recommendations</td>
</tr>
</tbody>
</table>
Types of Housing

**Single-Family Detached**
- Single-family detached
- Manufactured & mobile homes
- Cottage Housing

**Multifamily (2+ Units per Structure)**
- Duplexes
- Tri- and 4-Plexes
- Apartments – owner & renter occupied

**Single-Family Attached**
- Townhouses
Housing Mix, Keizer

Housing Tenure, Keizer

Change in Tenure

<table>
<thead>
<tr>
<th>Year</th>
<th>Owner-Occupied</th>
<th>Renter-Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>65%</td>
<td>35%</td>
</tr>
<tr>
<td>2010</td>
<td>61%</td>
<td>39%</td>
</tr>
<tr>
<td>2012-2016</td>
<td>62%</td>
<td>38%</td>
</tr>
</tbody>
</table>

Tenure by Type of Unit, 2016

- Owner:
  - Single-family detached: 96%
  - Single-family attached: 3%
  - Multifamily: 1%

- Renter:
  - Single-family attached: 25%
  - Multifamily: 66%
Building Permits, 2007 to 2017

Source: City of Keizer Building Permit Database
Growing Population, Keizer


<table>
<thead>
<tr>
<th>Year</th>
<th>Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>1990</td>
<td>21,884</td>
</tr>
<tr>
<td>2000</td>
<td>32,203</td>
</tr>
<tr>
<td>2010</td>
<td>36,478</td>
</tr>
<tr>
<td>2017</td>
<td>38,345</td>
</tr>
</tbody>
</table>
Growth in Latino Population

Source: U.S. Census, Decennial Census 2000 and ACS 2012-2016, Table P008 and B03002.
Factors that will affect housing demand in Keizer over the 2019-2039 period

- Age
- Household Composition
- Income
Aging Population, Keizer

Source: U.S. Census, Decennial Census 2000 and ACS 2012-2016
Household Size, 2013-2017 period

Source: U.S. Census, Decennial Census 2000 and ACS 2013-2017
Household Composition, 2012-2016

Source: U.S. Census, ACS 2012-2016, Table DP02.
Household Income, 2012-2016

Source: U.S. Census, ACS 2012-2016
Median Home Sales Price, 2017

- **Woodburn**: $248,000
- **Salem**: $250,000
- **Dallas**: $257,500
- **Keizer**: $260,000

**Source**: Redfin.
Median Home Sales Price, January 2016 to August 2018

Source: Redfin.
Median Rent, 2012-2016 Period

Source: U.S. Census, ACS 2012-2016, Table B25064.
Households paying 30% or more for housing costs are said to be cost burdened.

Cost Burden in Keizer:

- Renters: 54%
- Owners: 25%

Source: U.S. Census, American Community Survey 2012-2016
Financially Attainable Housing

If your household earns....

$20,200  
(30% of MFI)

$33,650  
(50% of MFI)

$53,800  
(80% of MFI)

$67,300  
(100% of MFI)

$80,800  
(120% of MFI)

Then you can afford....

$505  
monthly rent

$840  
monthly rent

$1,350  
monthly rent

$1,680  
monthly rent

$2,000  
monthly rent

$42,000  
home sales price

$142,400  
home sales price

$209,700  
home sales price

$277,000  
home sales price

Cashier  
$24,260

Teacher Assistant  
$33,490

Construction Worker  
$51,000

Police Officer  
$68,730

Electrical Engineer  
$84,790

Pharmacy Aid  
$27,130

Postal Carrier  
$47,770

Landscape Architect  
$64,870

Budget Analyst  
$77,280

### Population Forecast, Keizer’s Portion of UGB

<table>
<thead>
<tr>
<th>Year</th>
<th>Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>39,395</td>
</tr>
<tr>
<td>2039</td>
<td>49,318</td>
</tr>
</tbody>
</table>

**Change 2019 to 2039**

<table>
<thead>
<tr>
<th>Category</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number</td>
<td>9,923</td>
</tr>
<tr>
<td>Percent</td>
<td>25%</td>
</tr>
<tr>
<td>AAGR</td>
<td>1.13%</td>
</tr>
</tbody>
</table>

Source: Population Research Center, PSU. Note: Population forecast determined in collaboration with the Department of Land Conservation and Development, the City of Keizer, and the City of Salem.
## Forecast of Housing Growth, 2019 to 2039

<table>
<thead>
<tr>
<th>Variable</th>
<th>New Dwelling Units (2019-2039)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change in persons</td>
<td>9,923</td>
</tr>
<tr>
<td>\textit{minus} Change in persons in group quarters</td>
<td>94</td>
</tr>
<tr>
<td>\textit{equals} Persons in households</td>
<td>9,829</td>
</tr>
<tr>
<td>Average household size</td>
<td>2.69</td>
</tr>
<tr>
<td>New occupied DU</td>
<td>3,654</td>
</tr>
<tr>
<td>\textit{times} Aggregate vacancy rate</td>
<td>4.6%</td>
</tr>
<tr>
<td>\textit{equals} Vacant dwelling units</td>
<td>166</td>
</tr>
<tr>
<td>Total new dwelling units (2019-2039)</td>
<td>3,820</td>
</tr>
<tr>
<td>Annual average of new dwelling units</td>
<td>191</td>
</tr>
</tbody>
</table>
### Forecast by Housing Type, 2019 to 2039

<table>
<thead>
<tr>
<th>Variable</th>
<th>Baseline Housing Mix</th>
<th>Preliminary Needed Mix</th>
</tr>
</thead>
<tbody>
<tr>
<td>Needed new dwelling units (2019-2039)</td>
<td>3,820</td>
<td>3,820</td>
</tr>
<tr>
<td>Dwelling units by structure type</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Single-family detached</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Percent single-family detached DU</td>
<td>69%</td>
<td>60%</td>
</tr>
<tr>
<td><strong>equals</strong> Total new single-family detached DU</td>
<td>2,630</td>
<td>2,292</td>
</tr>
<tr>
<td>Single-family attached</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Percent single-family attached DU</td>
<td>4%</td>
<td>7%</td>
</tr>
<tr>
<td><strong>equals</strong> Total new single-family attached DU</td>
<td>170</td>
<td>267</td>
</tr>
<tr>
<td>Multifamily</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Percent multifamily</td>
<td>27%</td>
<td>33%</td>
</tr>
<tr>
<td><strong>Total new multifamily</strong></td>
<td>1,020</td>
<td>1,261</td>
</tr>
<tr>
<td><strong>equals</strong> Total new dwelling units (2019-2039)</td>
<td>3,820</td>
<td>3,820</td>
</tr>
</tbody>
</table>
New Dwelling Units by Income, 2019 to 2039

Implications for Housing Needs

- Growth in older households will result in more one-person households and additional demand for smaller units, for ownership and rental as well as assisted living facilities.

- Growth in households with families (Millennials) will result in demand for comparatively affordable units, for ownership and rental.

- Some households lack housing that is affordable; relatively few households can afford sales prices.

- Demand for greater range of housing types.
HNA: What types of housing?
Next Steps

- Refine Housing Needs Analysis
- Draft Buildable Lands Inventory

- PAC Meeting 2: February 20 @ 5:30 – 6:30 PM
- Open House 1: February 20 @ 7 – 8 PM