



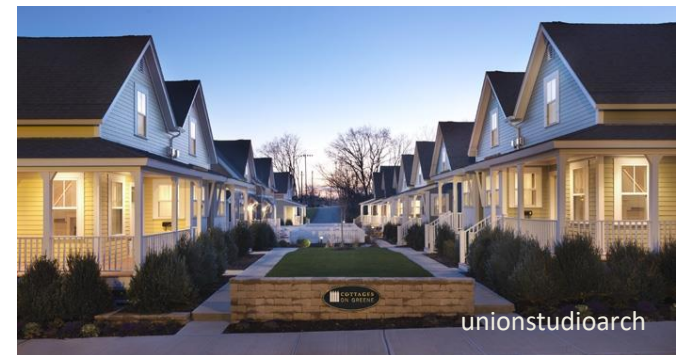
1. Housing Needs Assessment

– September 2019 – Completed by EcoNorthwest

2. HB 2001 – Missing Middle Housing Bill

3. Housing Affordability and Homelessness Taskforce

- Housing Needs Analysis for Clackamas County
 - Focus on urban unincorporated Clackamas County within the Metro UGB.
 - Baseline HNA for participating cities
 - Information about housing market and affordability for all cities
- Housing policy analysis for selected issues



Geographies in the Regional HNA

Unincorporated
Clackamas County within
the Metro UGB

Unincorporated
Clackamas County outside
the Metro UGB

Cities within the Metro
UGB

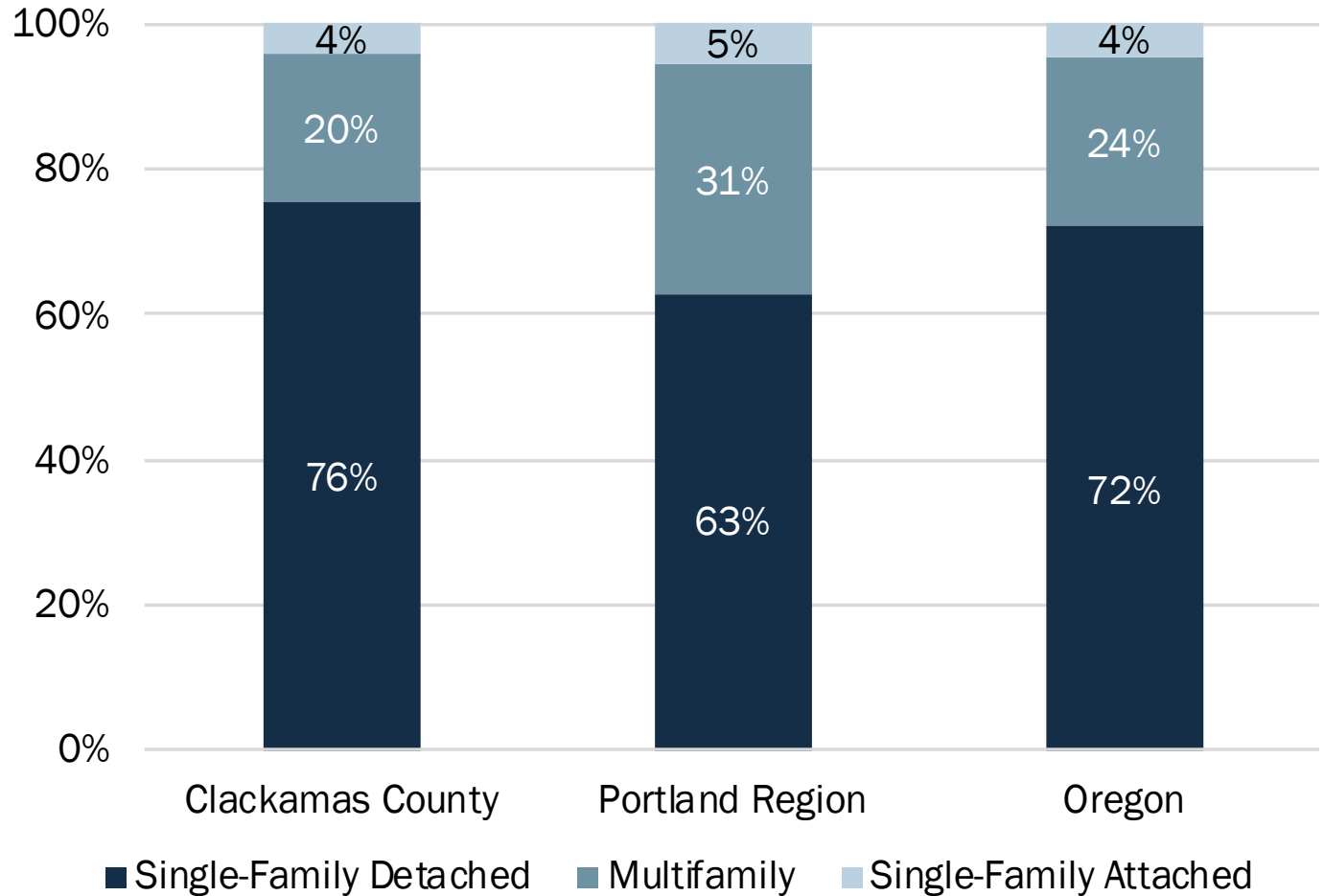
Gladstone, Happy Valley, Oregon City,
West Linn, and Wilsonville

Cities outside of the
Metro UGB

Estacada and Molalla

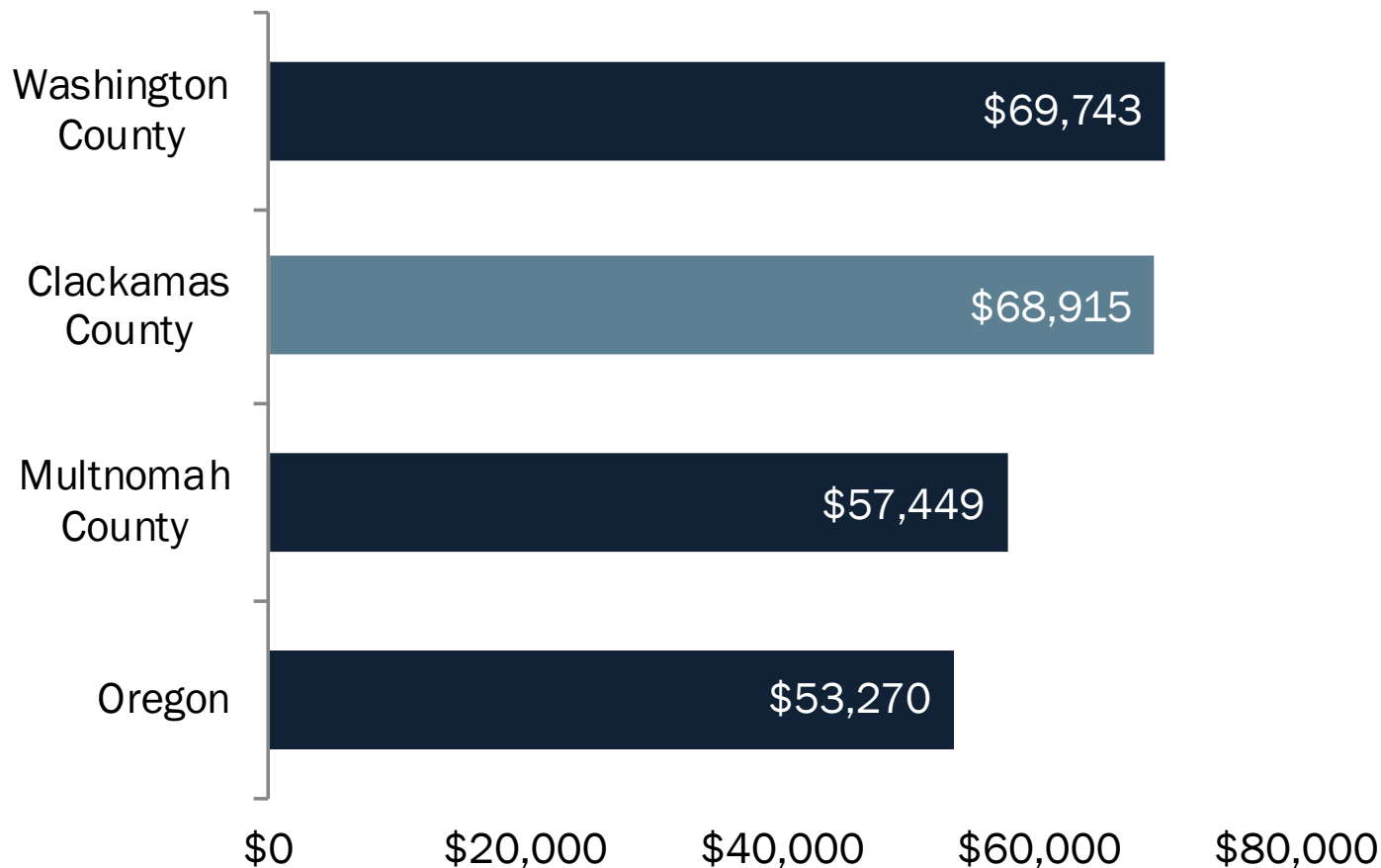
Housing Mix (2012-2016 period)

Housing mix in Clackamas County has not changed substantially since 2000.



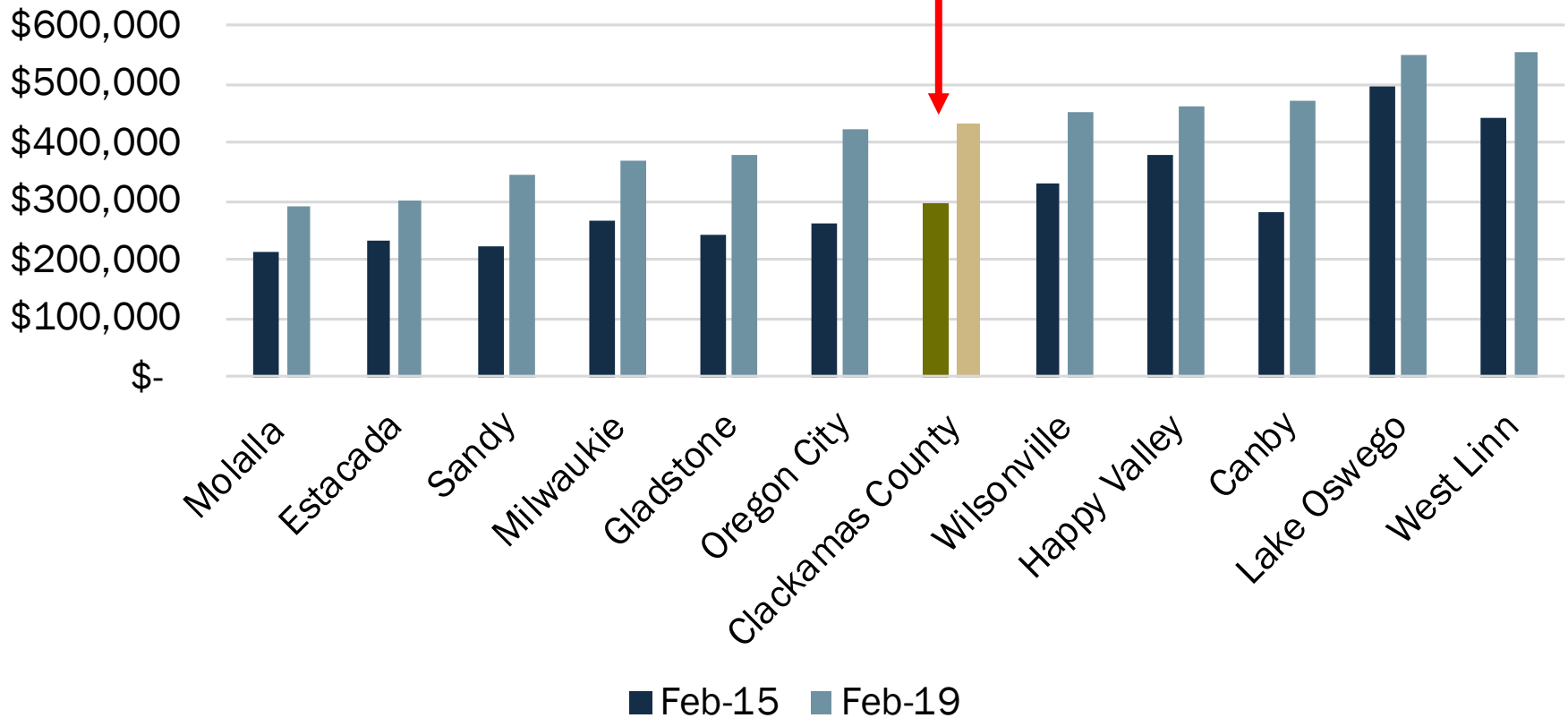
Median Household Income (2012-2016 period)

In 2000, Clackamas County's MHI was \$51,680, resulting in a \$17,235 or 33% increase.



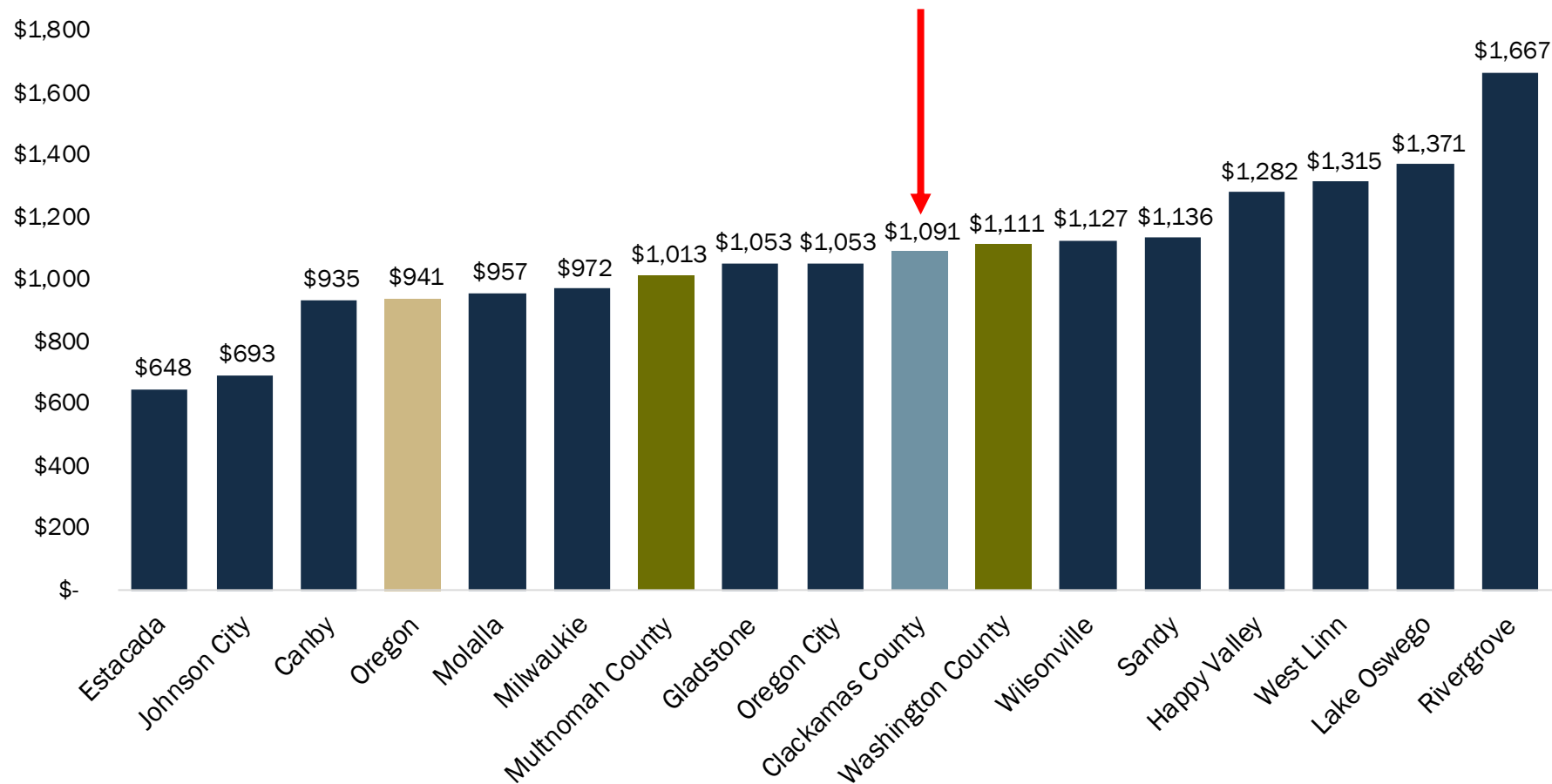
Change Median Sale Price, Feb. 2015 to Feb. 2019

Change in Median Sales Price in
Clackamas County: \$136,655 or 46%



Median Gross Rent (2012-2016 period)

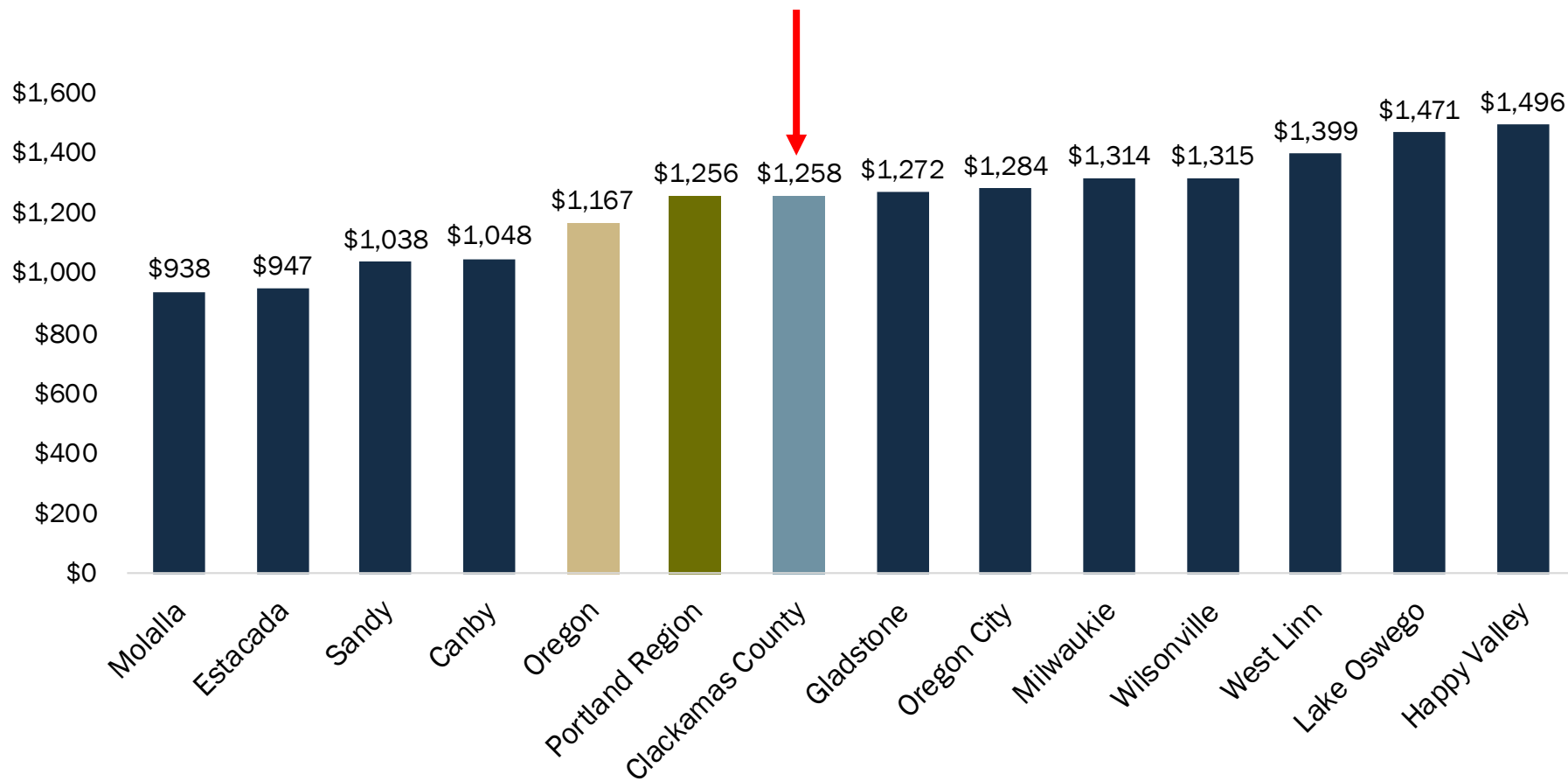
Change in Median Gross Rent in Clackamas County (2010 to 2018): \$389 or 55%



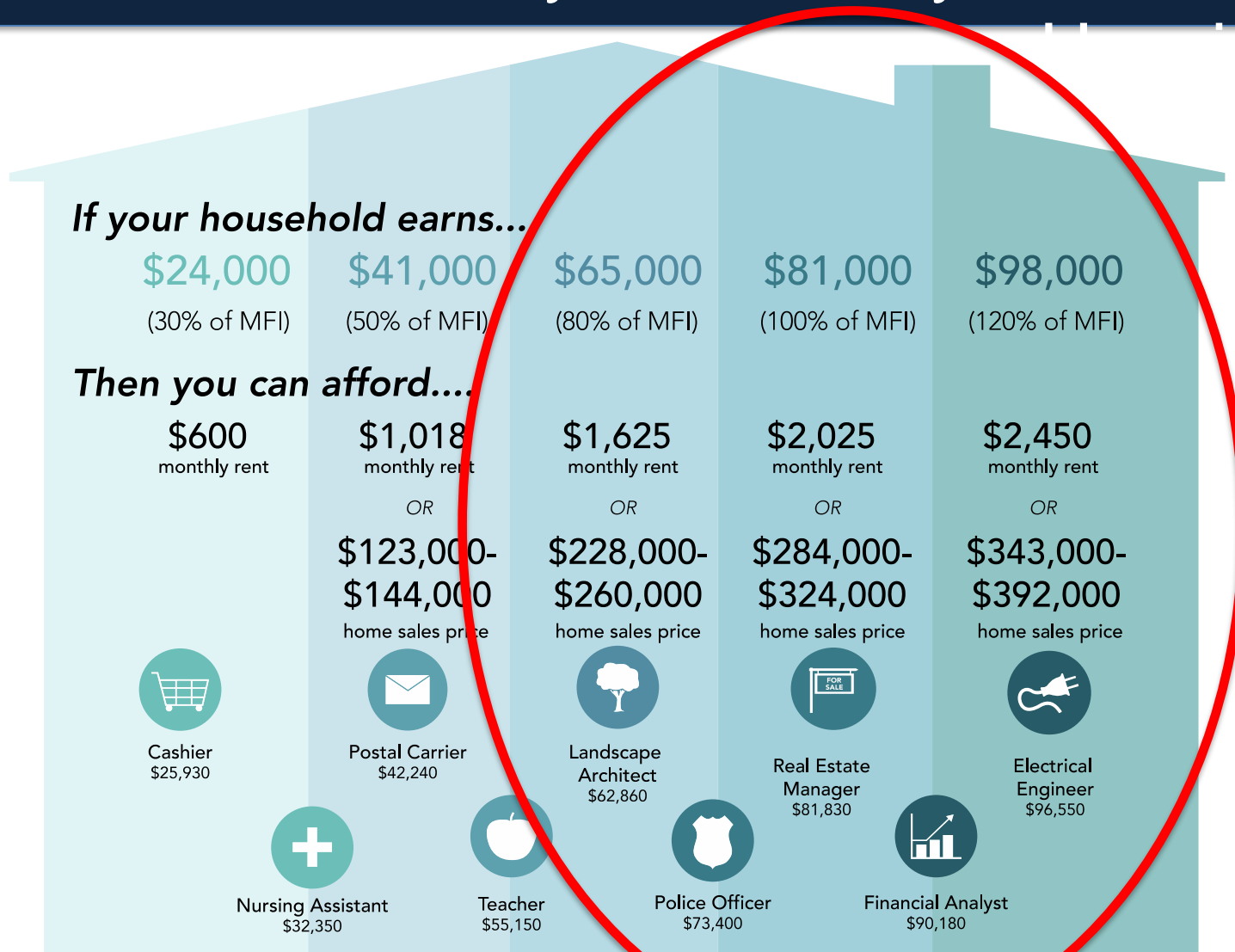
Source: U.S. Census Bureau, 2012-2016 ACS.

Multifamily Gross Rent (2018)

Change in Multifamily Gross Rent in Clackamas County (2010 to 2018): \$398 or 47%



Clackamas County: Financially Attainable



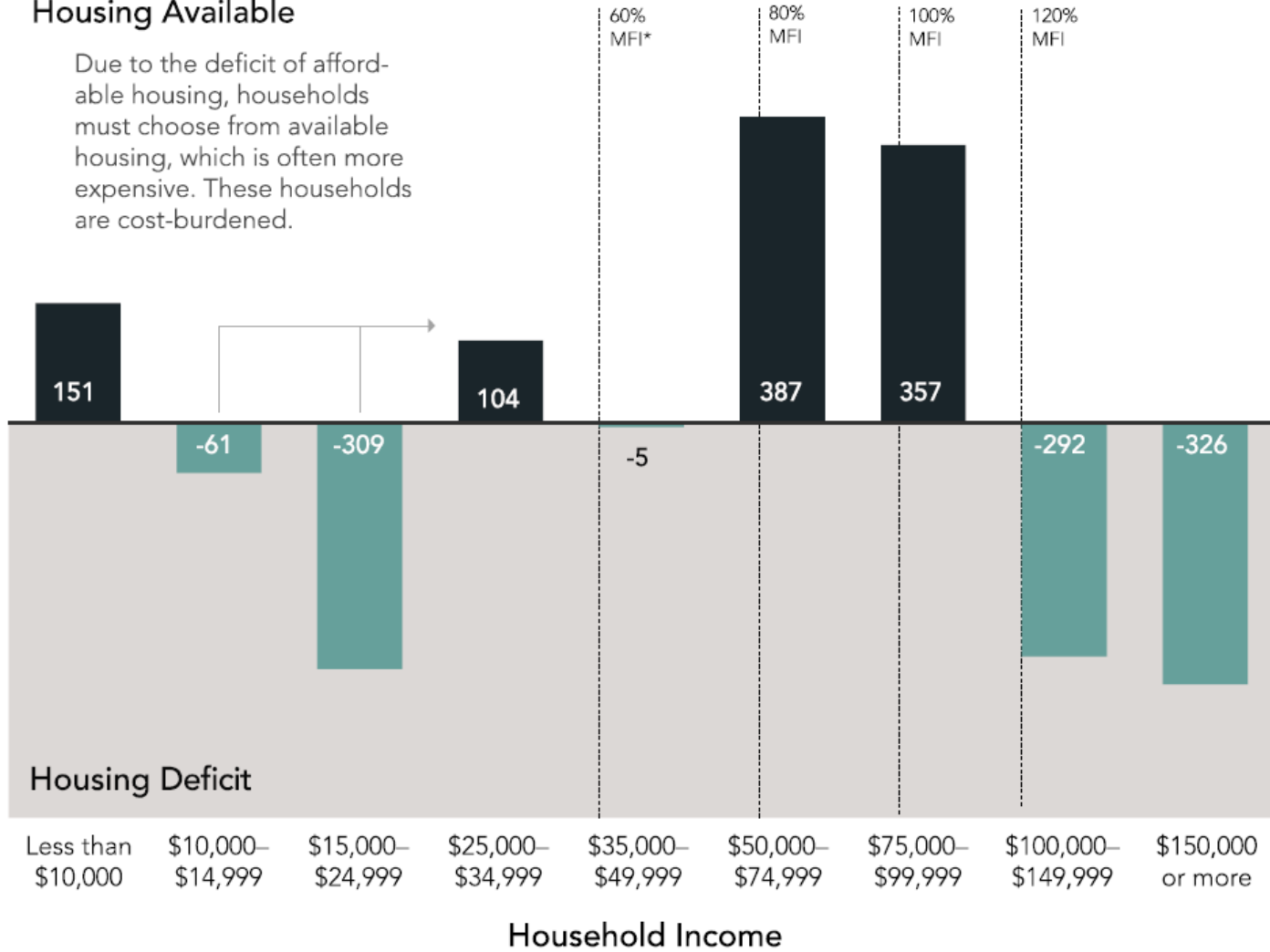
Source: U.S. Census Bureau, 2012-2016 ACS, U.S. Department of Housing and Urban Development, and Redfin.

Median Home Sale Price in Clackamas County: **\$434,900**

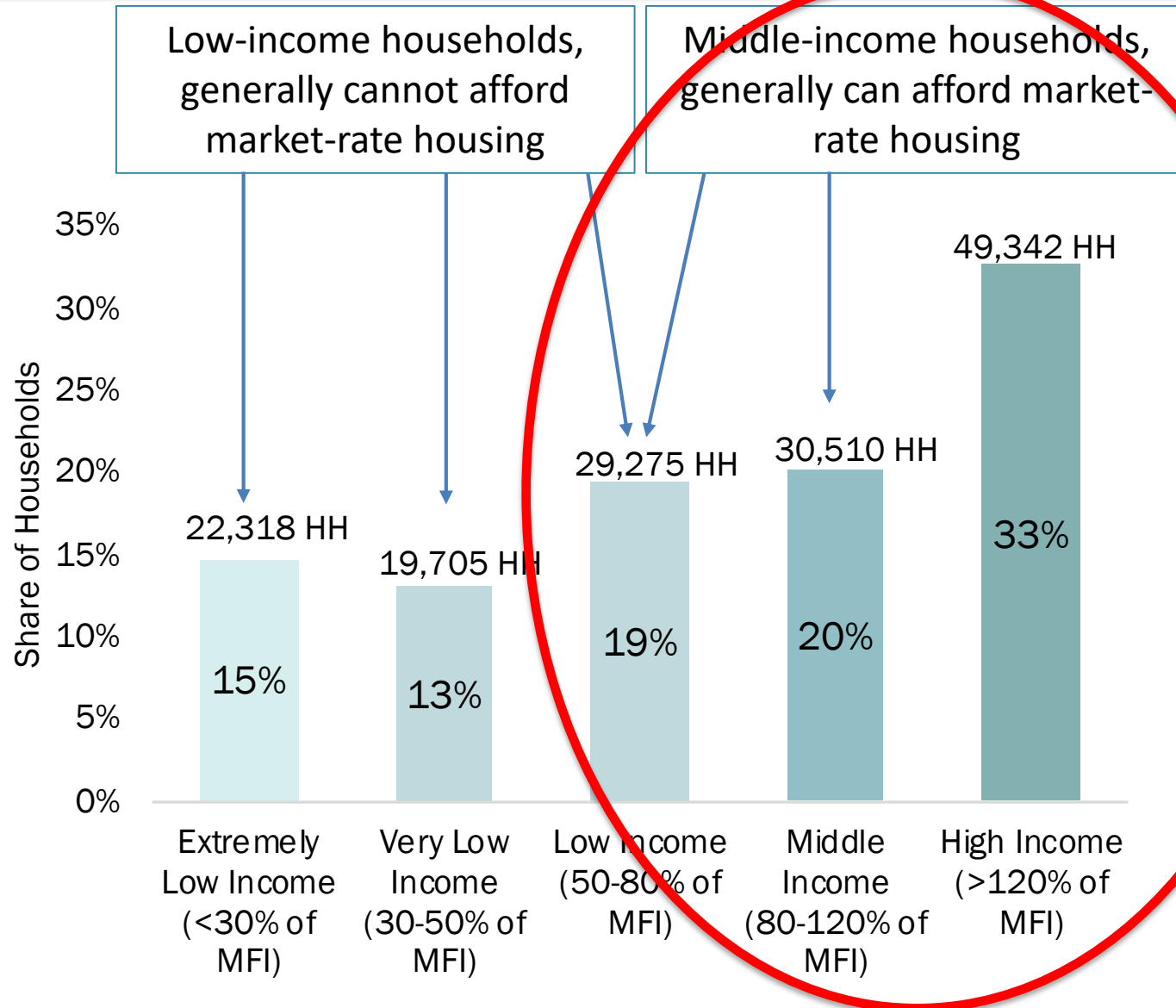
Median Multifamily Gross Rent in Clackamas County: **\$1,258**

Housing Available

Due to the deficit of affordable housing, households must choose from available housing, which is often more expensive. These households are cost-burdened.



Share of Clackamas County Households by MFI



HNA Summary of Factors Affecting Housing

- Growth in housing will be driven by growth in population
- Affordability will be a growing challenge
- Without substantial change in housing policy, on average, future housing will look a lot like past housing
- There will be an increasing demand for smaller average house size and lot size
- There is a need for smaller, less expensive units and a broader array of housing choices
- In rural areas, there may be a need for increased affordable housing options for workers in rural, unincorporated communities.

HNA Key Findings:

- Urban unincorporated populations is forecast to grow by 18,400 over the next 20 years, which equates to a demand for 8,175 new dwelling units
- There is a need to plan for increasing the share of single family attached and multi-family dwelling units
- There is a need to plan for a wider range of housing affordable to low-middle incomes. The wider range of housing types includes lower cost single family detached, townhouses, duplexes through quad-plexes and other types of multi-family housing
- Across all residential zoning categories, deficits exist for the amount of land needed to accommodate the needed dwelling units

HB 2001 – Missing Middle Housing Bill

Short Overview:

1. Applies to County's urban single-family residential zoned areas
2. Two basic requirements:
 - Allow at least a duplex on each lot zoned for residential use that allows for detached single family dwellings;
 - Allow defined types of middle housing (duplexes, triplexes, quadplexes, cottage clusters and townhouses in "areas" zoned for residential uses that allow detached single family dwellings
3. County is authorized to regulate siting
4. Must make ZDO amendments by June 30, 2022, unless an extension is received

Housing Affordability and Homelessness Task Force

Recommendations for Planning and Zoning Development:

Tier One:

- A. Provide a tiered density bonus for inclusion of affordable housing and create a transferrable development rights bonus system
- B. Increase maximum density for multi-family development in commercial zoning district
- C. Develop a hierarchy of parking standards based on proximity to transit
- D. Provide enhanced ability to create Shelter off the Streets (SOS) housing

Tier Two:

- E. Provide for Cottage Cluster Development
- F. Make duplexes and triplexes outright uses in SFR zones
- G. Repeal Owner Occupancy Requirements for ADUs
- H. Explore opportunities for additional housing types (micro-units, co-housing and live work units)
- I. Address ability to add housing to schools, places of worship and church owned properties

Long Range Planning Work Program

2019-21 Long-Range Planning Work Program

HOUSING: H-1. Update Comprehensive Plan Chapter 6: Housing, including, but not limited to, considering the following topics:

- **H-1A: Low-Density Residential Zoning Policies** – Based on the housing needs analysis, amend policies to apply different low-density residential zones (R-2.5 -- R-30).
- **H-1B: Housing Strategies**
 - Amend Comprehensive Plan and ZDO to address results of the housing needs analysis, implement recommendations expected from the Housing Affordability and Homelessness Task Force, and respond to Senate Bill 1051 (2017) and any housing legislation passed by the 2019 Oregon Legislature.
 - Consider restricting manufactured dwelling parks from being redeveloped with a different use.
 - Address the need to amend the ZDO to extend the transitional shelter community regulations, which will otherwise sunset August 28, 2019.
- **H-1C: Protect Neighborhood Character and R-10 Zoning**
 - Modify the ZDO to better protect neighborhoods from up-zoning and incompatible development.
 - Amend the ZDO to implement the Comprehensive Plan goal of protecting the character of low-density neighborhoods and require that development be compatible with the identified neighborhood character.
 - Adopt a local overlay area that freezes R-10 zoning and has higher standards for zoning approvals, or a limitation on the amount of development or infill allowed in the overlay area.
- **H-1D: Temporary Dwellings for Care** – Allow temporary dwellings for care only for property owners or heritage landowners. Require removal of temporary dwellings for care prior to title change or sale.

BCC / Planning Commission Discussion

1. Of the various recommendations that have been discussed, what resonates with you?
2. What concerns do you have about any of the recommendations?
3. What issues may arise as the Long Range Planning work program item on “Housing Strategies” begins and while it is underway?