



# Forest Grove Housing Needs Analysis Update

Technical Advisory Committee  
Kick-Off Meeting

February 13, 2019

# Background

- The City completed a Housing Needs Analysis (HNA) in 2009 to:
  - Support the City's Comprehensive Plan update; and
  - Comply with Statewide Planning Goal 10 (Housing).
- Foremost, an HNA looks at housing supply and demand for a defined 20-year planning period.
- An HNA is both a product and a process.



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ECONOMIC OPPORTUNITIES ANALYSIS  
& LONG-TERM URBAN  
LAND NEEDS ASSESSMENT

Prepared For:  
CITY OF FOREST GROVE, OREGON  
August 27, 2009



FOREST GROVE  
*Where Oregon pinot was born*

# Background

- Much has changed since 2009:
  - The “Great Recession” occurred.
  - The economy rebounded affecting housing demand.
  - The Oregon Legislature expanded the UGB in the City’s planning area.
  - The City completed an affordable housing needs assessment with a City Council advisory committee.
  - Forest Grove was identified as a community with severe rent burden.



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# Background

- The state Department of Land Conservation and Development (DLCD) is helping severe rent burden communities by funding consultant assistance to update local HNAs.
- FCS Group was selected for this project.



# HNA Context

- Statewide Planning Goal 10

*“To provide for the housing needs of citizens of the state.”*

## Oregon’s Statewide Planning Goals & Guidelines



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635 Capitol St. NE, Suite 150  
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[www.oregon.gov/lcd](http://www.oregon.gov/lcd)

# HNA Context

- Statewide Planning Goal 10 (continued):
  - Buildable lands for residential use shall be inventoried.
  - Plans shall encourage adequate numbers of needed housing units at price and rent levels commensurate with the financial capabilities of households.
  - Allow for the flexibility of housing locations, type and density.

# HNA Context

- Goal 10 (continued) - Needed Housing Statute (ORS 197):
  - Housing on land zoned for residential, mixed, and commercial use.
  - Housing at prices and rents affordable to households across the income spectrum.
  - Needed housing types:
    - Attached and detached single-family housing for owners and renters
    - Multifamily housing for renters and owners
    - Government assisted housing
    - Manufactured homes and manufactured home parks
    - Housing for farmworkers

# Context

- An HNA must include:
  - Trends analysis:
    - National, state, regional and local trends affecting housing supply and demand.
  - Inventory of existing housing stock:
    - Snapshot showing existing housing units by price / rent and tenure (owner-occupied and renter-occupied)
  - Housing demand projections:
    - 20-year projection of housing demand based on the trends.
  - Land Needs to accommodate demand given current supply.
    - Based on Buildable Land Inventory
    - Recommend comprehensive plan map / zoning map amendments, if needed
    - UGB expansion.

# HNA Update Tasks

1. Project kick-off and data gathering;
2. Review current trends affecting housing;
3. Document current housing stock and unit count;
4. Project 20-year housing demand;
5. Residential Land Needs Analysis;
6. Measures to accommodate need;
7. Open house and state required severe rent burden meeting; and
8. Final Housing needs analysis.

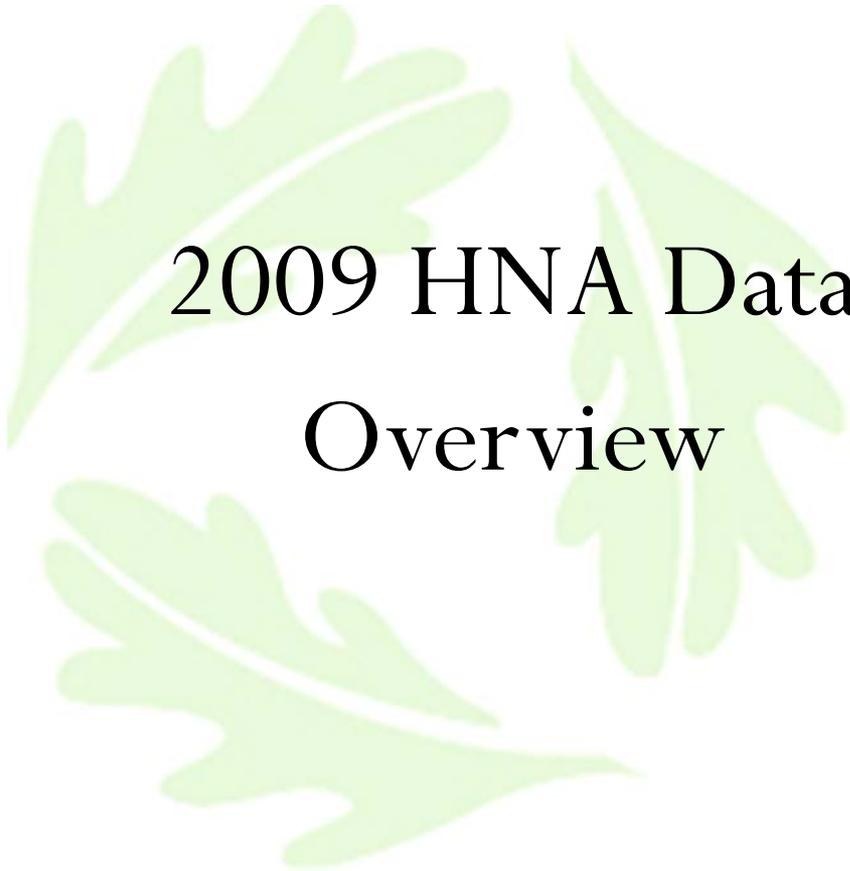
# What to Expect

- Deliverables:
  - Trends Memo
  - Existing Housing Stock Memo
  - Housing Projections
  - Residential Land Need Analysis
  - Measures to Accommodate Needed Housing Memo
  - Adoption Ready Draft of HNA
  - Severe Rent Burden Meeting (HB 4006)

# What to Expect

- Not in project budget/ scope:
  - Buildable Land Inventory
    - Already completed for another project
- Housing economic for financial feasibility analysis
- Infrastructure needs assessment
- Affordable housing strategies
  - Although outcomes could inform strategies





# 2009 HNA Data Overview

**FIGURE 38: COMPARISON OF CURRENT NEED TO CURRENT SUPPLY**

Ownership				Rental			
Price Range	Estimated Current Need	Estimated Current Supply	Unmet (Need) or Surplus	Rent	Estimated Current Need	Estimated Current Supply	Unmet (Need) or Surplus
\$0 - 50k	211	416	205	\$0 - 250	469	40	(429)
\$50k - 70k	135	156	21	\$250 - 375	289	138	(151)
\$70k - 90k	137	156	18	\$375 - 500	240	163	(77)
\$90k - 120k	143	157	14	\$500 - 625	271	933	662
\$120k - 160k	432	390	(42)	\$625 - 875	396	1,163	767
\$160k - 230k	701	1,462	762	\$875 - 1,250	497	642	145
\$230k - 350k	1,085	1,027	(58)	\$1,250 - 1,875	601	330	(271)
\$350k - 460k	779	315	(464)	\$1,875 - 2,500	133	82	(51)
\$460k - 690k	656	147	(510)	\$2,500 - 3,750	48	0	(48)
\$690k +	195	52	(143)	\$3,750 +	0	0	0
<b>Totals:</b>	<b>4,474</b>	<b>4,278</b>	<b>(196)</b>	<b>Totals:</b>	<b>2,945</b>	<b>3,490</b>	<b>546</b>

Sources: PSU Population Research Center, Claritas Inc., Census, Johnson Reid  
 Values are in 2008 dollars.

FIGURE 40: PROJECTED TOTAL FUTURE HOUSING NEEDS (2028 )

BASELINE GROWTH SCENARIO (2.0% ANNUAL POPULATION GROWTH)

Ownership				Rental				
Price Range	# Units	% of Units	Cumulative	Rent	# Units	% of Units	Cumulative	
\$0 - 50k	322	4.2%	4.2%	\$0 - 250	653	16.0%	16.0%	
\$50k - 70k	186	2.4%	6.7%	\$250 - 375	365	9.0%	25.0%	
\$70k - 90k	206	2.7%	9.4%	\$375 - 500	337	8.3%	33.3%	
\$90k - 120k	217	2.9%	12.3%	\$500 - 625	332	8.1%	41.4%	
\$120k - 160k	617	8.1%	20.4%	\$625 - 875	544	13.4%	54.8%	
\$160k - 230k	1,038	13.7%	34.1%	\$875 - 1,250	671	16.5%	71.2%	
\$230k - 350k	1,605	21.1%	55.2%	\$1,250 - 1,875	827	20.3%	91.5%	
\$350k - 460k	1,387	18.3%	73.5%	\$1,875 - 2,500	233	5.7%	97.2%	
\$460k - 690k	1,487	19.6%	93.1%	\$2,500 - 3,750	112	2.8%	100.0%	
\$690k +	527	6.9%	100.0%	\$3,750 +	0	0.0%	100.0%	<b>All Units</b>
<b>Totals:</b>	<b>7,592</b>	<b>% of All:</b>	<b>65.1%</b>	<b>Totals:</b>	<b>4,076</b>	<b>% of All:</b>	<b>34.9%</b>	<b>11,668</b>

Sources: PSU Population Research Center, Claritas Inc., Census, Johnson Reid  
 Values are in 2008 dollars.

**FIGURE 42: PROJECTED FUTURE NEED FOR NEW HOUSING UNITS (2028 – BASELINE GROWTH SCENARIO)**

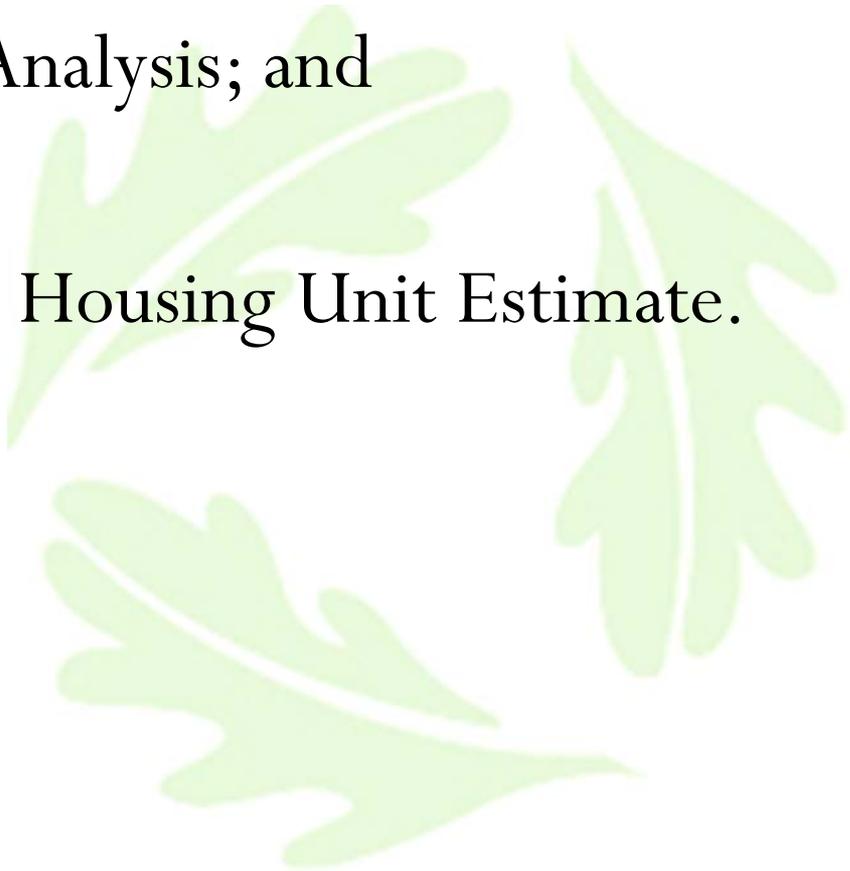
OWNERSHIP HOUSING									
Price Range	Single Family	Duplex	3- or 4-plex	5+ Units MFR	Mobile home	Boat, RV, other	Total Units	% of Units	Cummulative %
\$0 - 50k	-71	8	7	5	0	0	-51	-1.6%	-1.6%
\$50k - 70k	27	5	4	3	0	0	39	1.2%	-0.4%
\$70k - 90k	44	6	4	3	0	0	58	1.7%	1.4%
\$90k - 120k	52	6	5	3	0	0	66	2.0%	3.4%
\$120k - 160k	194	18	13	10	0	0	235	7.1%	10.5%
\$160k - 230k	-326	25	22	15	0	0	-264	-8.0%	2.5%
\$230k - 350k	494	47	34	25	0	0	600	18.1%	20.6%
\$350k - 460k	890	44	30	23	0	0	987	29.8%	50.4%
\$460k - 690k	1,108	49	32	25	0	0	1,214	36.6%	87.0%
\$690k +	393	17	11	9	0	0	430	13.0%	100.0%
<b>Totals:</b>	<b>2,805</b>	<b>226</b>	<b>162</b>	<b>121</b>	<b>0</b>	<b>0</b>	<b>3,314</b>	<b>% All Units:</b>	<b>85.0%</b>
<b>Percentage:</b>	<b>84.6%</b>	<b>6.8%</b>	<b>4.9%</b>	<b>3.7%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>100.0%</b>		

Sources: PSU Population Research Center, Claritas Inc., Census, Johnson Reid  
 Values are in 2008 dollars.

RENTAL HOUSING									
Price Range	Single Family	Duplex	3- or 4-plex	5+ Units MFR	Mobile home	Boat, RV, other	Total Units	% of Units	Cummulative %
\$0 - 250	209	53	85	262	0	0	609	104.0%	104.0%
\$250 - 375	88	19	30	89	0	0	226	38.6%	142.6%
\$375 - 500	72	15	22	64	0	0	173	29.6%	172.3%
\$500 - 625	-121	-55	-98	-321	0	0	-596	-101.7%	70.5%
\$625 - 875	-107	-58	-104	-343	0	0	-612	-104.6%	-34.1%
\$875 - 1,250	65	1	-6	-30	0	0	30	5.1%	-29.0%
\$1,250 - 1,875	195	42	65	192	0	0	494	84.4%	55.4%
\$1,875 - 2,500	57	13	20	59	0	0	150	25.6%	81.0%
\$2,500 - 3,750	38	10	16	48	0	0	111	19.0%	100.0%
\$3,750 +	0	0	0	0	0	0	0	0.0%	100.0%
<b>Totals:</b>	496	40	29	21	0	0	586	<b>% All Units:</b>	15.0%
<b>Percentage:</b>	84.6%	6.8%	4.9%	3.7%	0.0%	0.0%	100.0%		

Sources: PSU Population Research Center, Claritas Inc., Census, Johnson Reid  
 Values are in 2008 dollars.

# Review Drafts Completed

- Trends Analysis; and
  - Current Housing Unit Estimate.
- 

# Preliminary Data for Discussion

- Current Housing Unit Estimate:
  - Oregon Housing and Community Services
    - Affordable Housing Database: 679 units.
    - With income or rent restrictions: 526 units.

# Preliminary Data for Discussion

- Current Housing Unit Estimate:

Project	Type	Units
Juniper Gardens Apartments	Farmworker Housing	46
Jose Arciga Apartments	Farmworker Housing	55
Elm Park Apartments	Farmworker Housing	61
<b>TOTAL</b>		162
Rose Grove	Manufactured Home Park	340
Quail Run	Manufactured Home Park	150
The Homestead	Manufactured Home Park (Seniors)	163
Hampton Court	Manufactured Home Park / RV	12
<b>TOTAL</b>		665

# Preliminary Data for Discussion

- “Naturally Occurring” affordable housing
  - About 2,000 or 24% of the City’s housing stock.
  - About 4,200 units (50% of the City’s housing stock) was built prior to 1970 according to the American Community Survey.
  - Some of these units could provide affordable housing options compared to newer units which tend to be larger and have more amenities.



*The End*