



Wilsonville Housing Needs and Capacity Analysis

Housing Our Future Task Force
Meeting #1

June 6, 2024

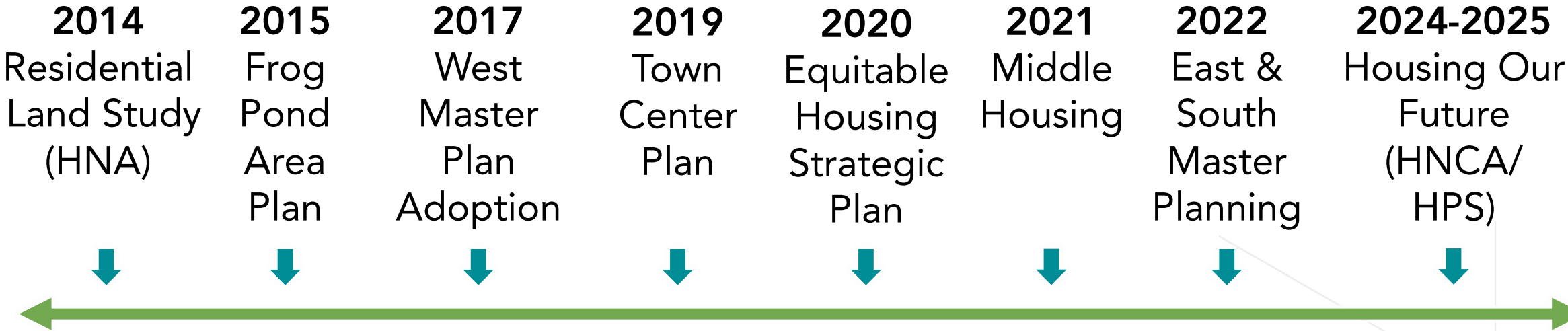


- Project Overview and Schedule
- Draft Results of HNCA
 - ◆ Buildable Lands Inventory
 - ◆ Housing Market and Housing Need in Wilsonville
 - ◆ Housing Forecast and Land Sufficiency
- Next Steps

Attainable Housing is Important to Wilsonville



A History of Planning for Housing



Why do a Housing Needs and Capacity Analysis (HNCA) and a Housing Production Strategy (HPS)?

Answer questions...

- How much growth will occur over the next 20 years?
- Where is the buildable land?
- Does Wilsonville have enough buildable residential land to accommodate expected growth?
- What policies are needed to meet Wilsonville's housing needs?

Components of the Project

Housing Needs & Capacity Analysis

Technical report about:

- Buildable lands inventory
- Housing market
- Demographic and socioeconomic characteristics of residents
- Housing affordability
- Forecast of new housing
- Land sufficiency

Housing Production Strategy

- Measures to accommodate needed housing
- Housing Affordability
- Housing needs for different demographic groups
- Infrastructure needed to support housing development
- Funding options

Revised Comprehensive Plan

- Updated information (*HNCA*)
- Updated policies (*Housing Strategy*)

Changes to Zoning Code

Housing Policies and Programs

Housing policies not addressed through Comprehensive Plan updates

Changes made after this project is completed

Completed Engagement

- Draft HNCA results and public survey (July-Sep 2023)
- Annual Block Party (Aug 25, 2023)
- Rent Burdened Public Meeting (Nov 8, 2023)

Planned Engagement


- Task Force meetings (5)
- Stakeholder Interviews (6)
 - Focus on people with unmet housing needs
- Culturally Specific Community Event
- Conversation Guide
- Housing Strategies Open House

What comments do you have about the plan for public engagement?

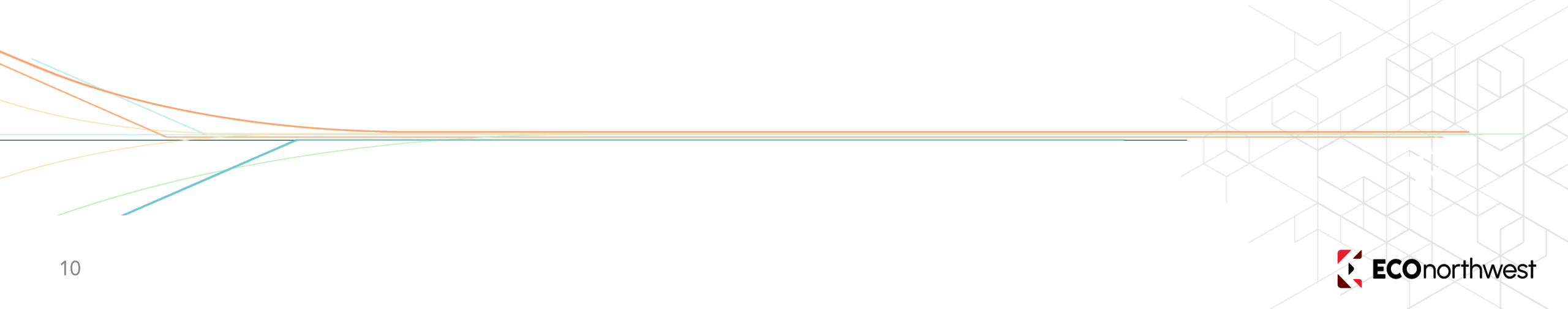
Based on your knowledge and experience....

- Providing comments about the analysis in the HNCA
- Providing input on housing actions for the HPS
 - Input on removing barriers
 - Helping select actions, based on the outcomes of the action
 - Identify opportunities to build partnerships to support implementation of the actions in the HPS

Project Schedule

	Kickoff March 2024	Complete HNCA March-July 2024	Contextualized Housing Need May-Aug 2024	Strategies Development June-Dec 2024	Draft and Final HPS Jan-March 2025	Adoption Apr-May 2025
TECHNICAL ANALYSIS		<ul style="list-style-type: none"> Update BLI and other data Housing forecast and land sufficiency 	<ul style="list-style-type: none"> Characterize housing need Summarize prior outreach 	<ul style="list-style-type: none"> Review existing policies and identify gaps Refine strategies 	<ul style="list-style-type: none"> Compile HPS 	
OUTREACH		<ul style="list-style-type: none"> Task Force #1  <p>We are here</p>	<ul style="list-style-type: none"> Interviews (6) Culturally Specific Event Task Force #2 Joint PC/CC 	<ul style="list-style-type: none"> Open House Task Force (#3 & #4) PC meeting CC meeting 	<ul style="list-style-type: none"> Task Force #5 PC meeting CC meeting 	<ul style="list-style-type: none"> PC Hearing CC Hearing
DELIVERABLE		<ul style="list-style-type: none"> Draft HNCA Final HNCA 	<ul style="list-style-type: none"> Contextualized Housing Needs memo 	<ul style="list-style-type: none"> Memo 1: Existing policies & gaps Memo 2: Evaluate & refine Memo 3: Additional info 	<ul style="list-style-type: none"> Draft HPS Final HPS 	

Buildable Lands Inventory

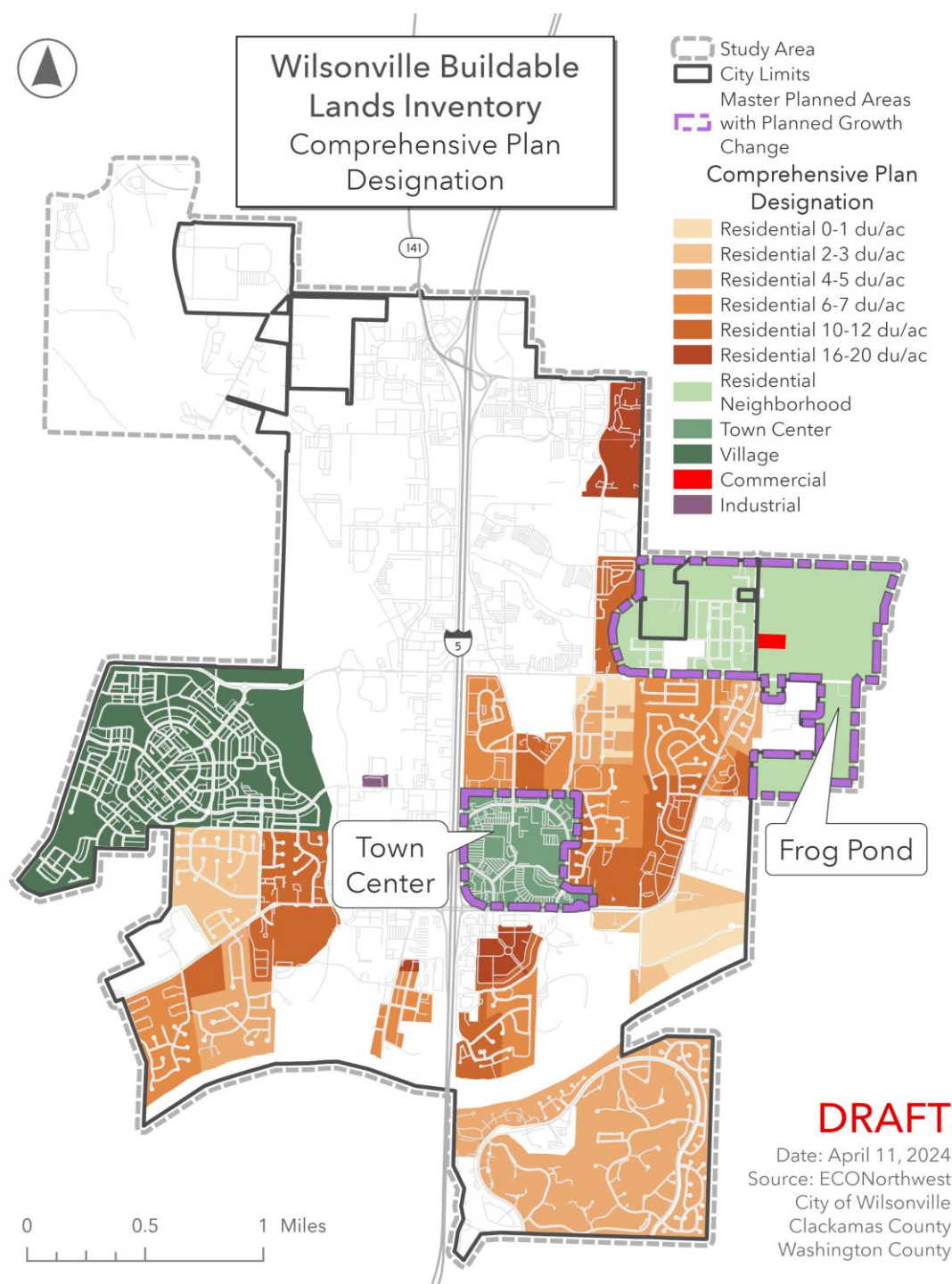


Statewide Planning Goal 10....

“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.”

1. Gather and Assemble Data
2. Classify Land
3. Identify and Remove Constraints
4. Verification
5. Summarize Results

Wilsonville Comprehensive Plan designations where housing is allowed



- **Developed**

Lots fully developed consistent with current zoning. Improved lots unlikely to redevelop within the 20-year period.

- **Vacant**

Lots that have no structures or have buildings with very little improvement value (\$10,000 or less).

- **Partially vacant**

Lots occupied by a use but contain enough land to be developed further in current zone.

- **Undevelopable**

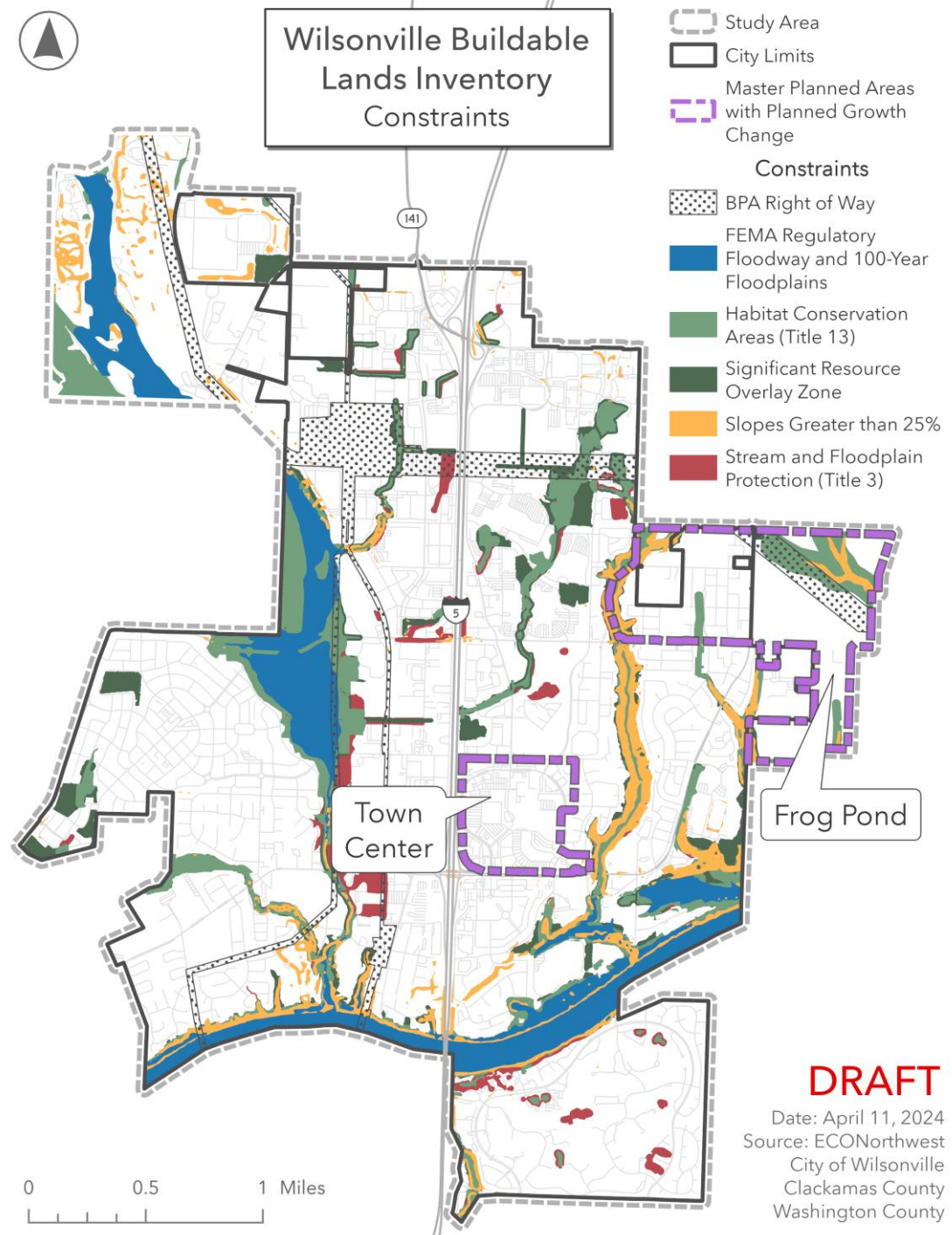
Vacant tax lots less than 3,000 square feet in size.

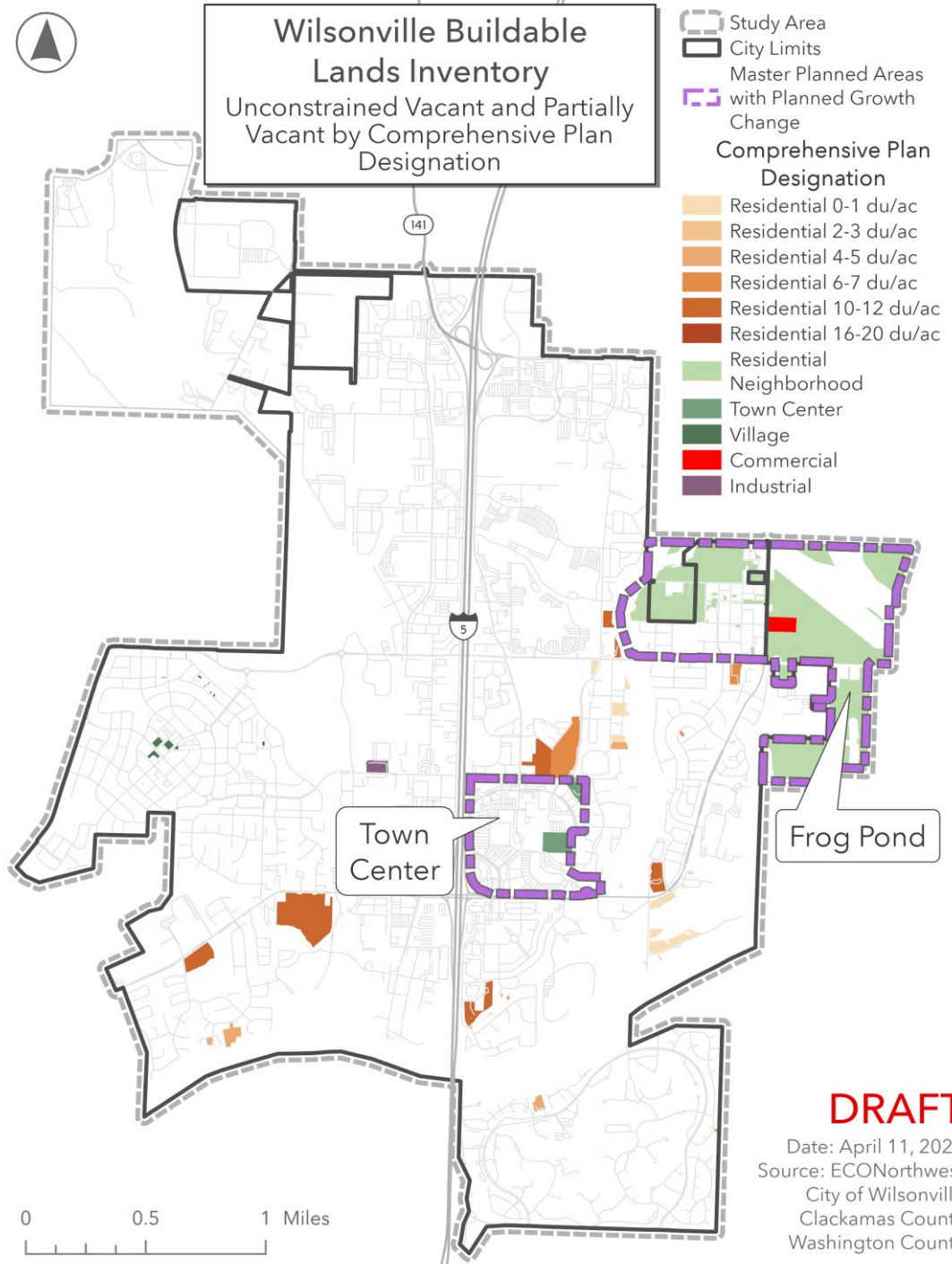
- **Public**

Lands in public, including Federal, State, County, or City ownership.

Constrained Lands

- FEMA Regulatory Floodway
- FEMA 100-Year Floodplains
- Habitat Conservation Areas
- Significant Resource Zoning
- Slopes (Greater Than 25%)
- Stream and Floodplain Protection
- BPA Right of Way





Unconstrained Vacant and Partially Vacant Land by Comprehensive Plan Designation

Development of Frog Pond and Town Center will depend on infrastructure availability, affecting timing of development.

DRAFT
Date: April 11, 2024
Source: ECONorthwest
City of Wilsonville
Clackamas County
Washington County

Unconstrained Vacant and Partially Vacant Land

Total Unconstrained Buildable Acres: 269

Jurisdiction/Comprehensive Plan Designation	Total Buildable Acres	Buildable Acres on Vacant Lots	Buildable Acres on Partially Vacant Lots
Outside of Master Planned Areas	64	49	15
Residential 0-1 du/ac	4	-	4
Residential 2-3 du/ac	-	-	-
Residential 4-5 du/ac	3	-	3
Residential 6-7 du/ac	14	13	1
Residential 10-12 du/ac	39	31	7
Village	2	2	-
Industrial	3	3	-
Master Planned Areas with Planned Growth Change	205	117	88
Frog Pond East	92	79	13
Frog Pond South	53	17	35
Frog Pond West	53	14	39
Town Center	8	7	1
Total	269	166	103

Note: Village is the Villebois Master Plan Area. It is almost fully built out and is therefore not included in the master plan areas with planned growth change.

Housing Market and Housing Need in Wilsonville

Inventory buildable land and capacity of land for housing development



Forecast new households, evaluate housing trends, and understand housing affordability



Forecast amount and types of new housing units needed



Evaluate whether Wilsonville has enough land to accommodate housing growth



Housing Needs and Capacity Analysis (HNCA)

Needed Housing Types (ORS 197A.348)

Needed housing includes the following housing types:

- Attached and detached single-family housing, middle housing types, and multiple family housing for both owner and renter occupancy;
- Government assisted housing;
- Mobile home or manufactured dwelling parks as provided in ORS 197.475 to 197.490; and;
- Manufactured homes on individual lots planned and zoned
- Housing for farmworkers

Types of Housing – Owner and Renter Occupied

Single Family Detached

- Single-family detached
- Manufactured & mobile homes
- Cottage Housing



Townhouses



Plexes (2 to 4 units per structure on lot)

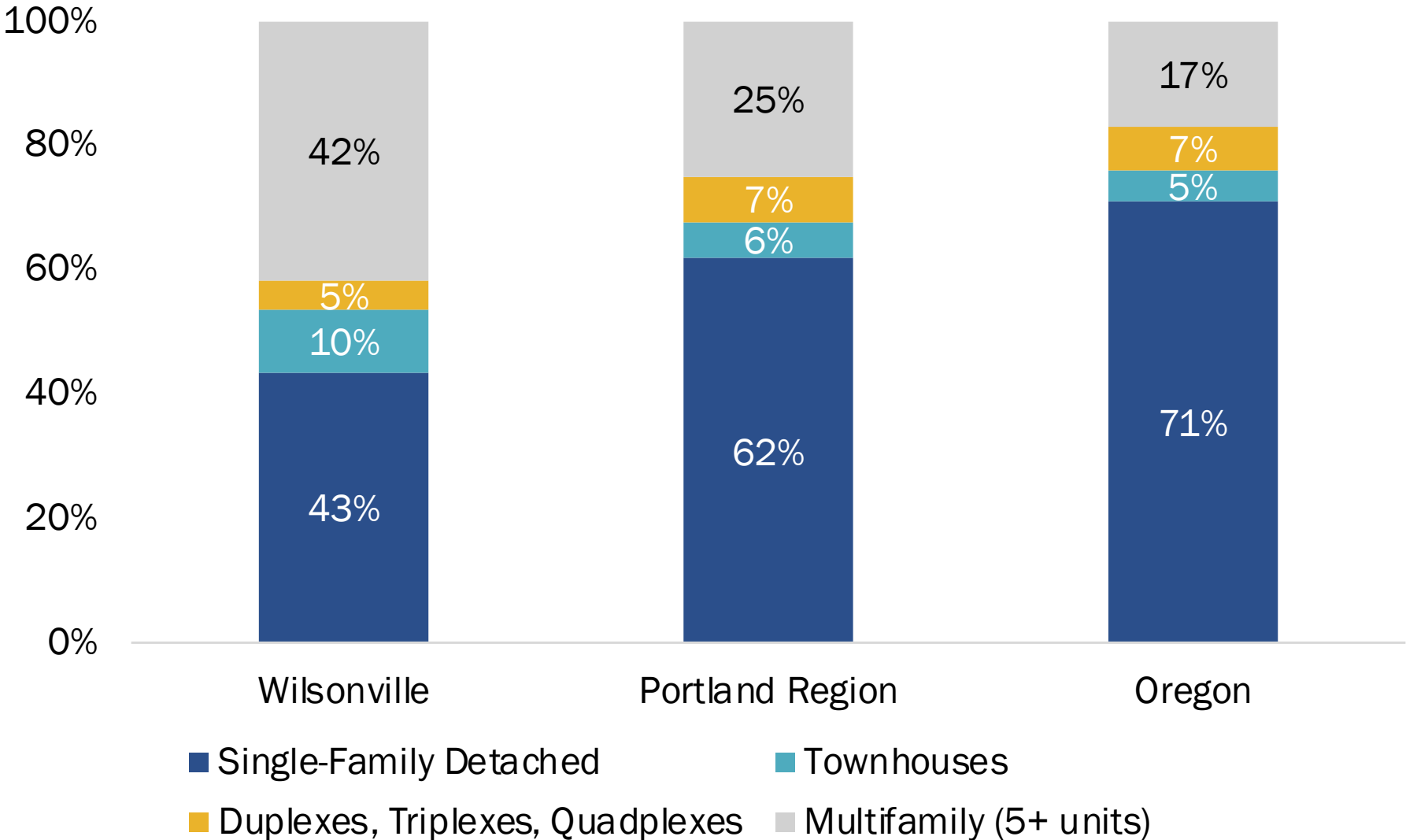
- Duplexes
- Triplexes
- Quadplexes



Multifamily (5+ units per structure)

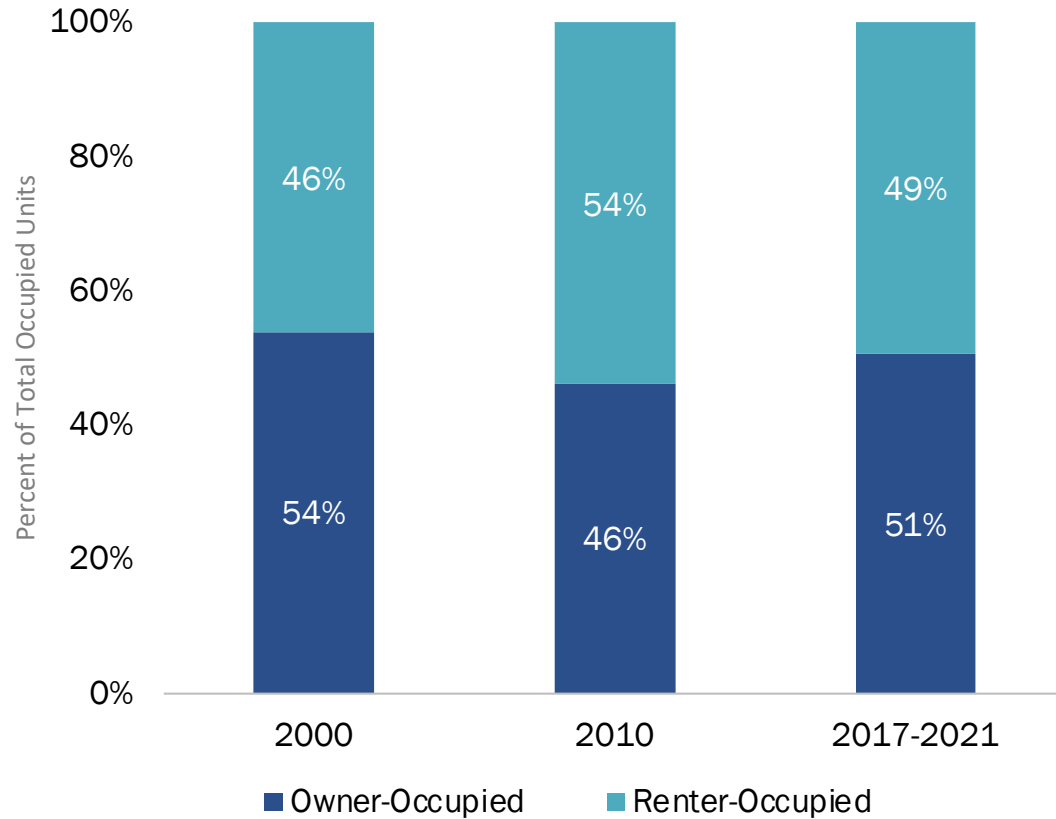


Housing Mix

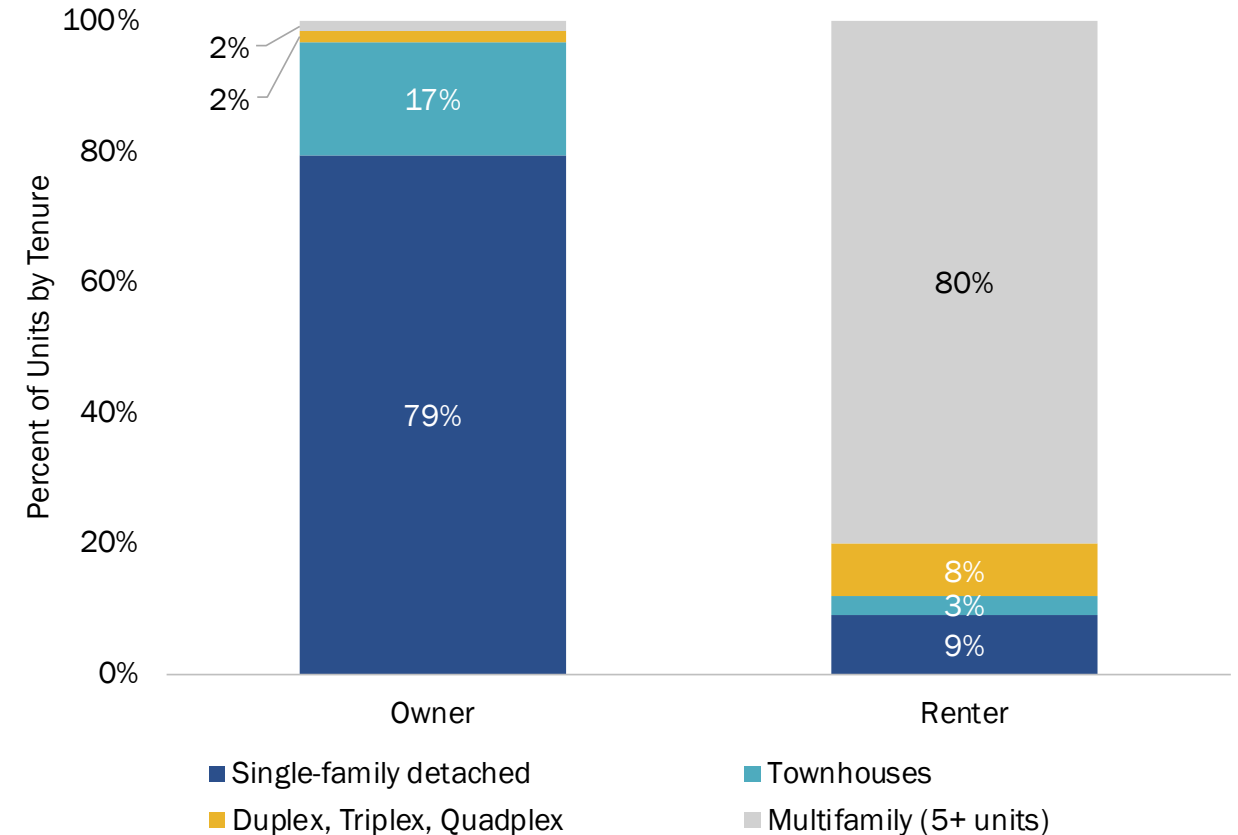


Source: U.S. Census, ACS 2017-2021, B25024

Change in Tenure of Occupied Units, Wilsonville, 2000, 2010, and 2017-2021



Housing Units by Type and Tenure, Wilsonville, 2017-2021

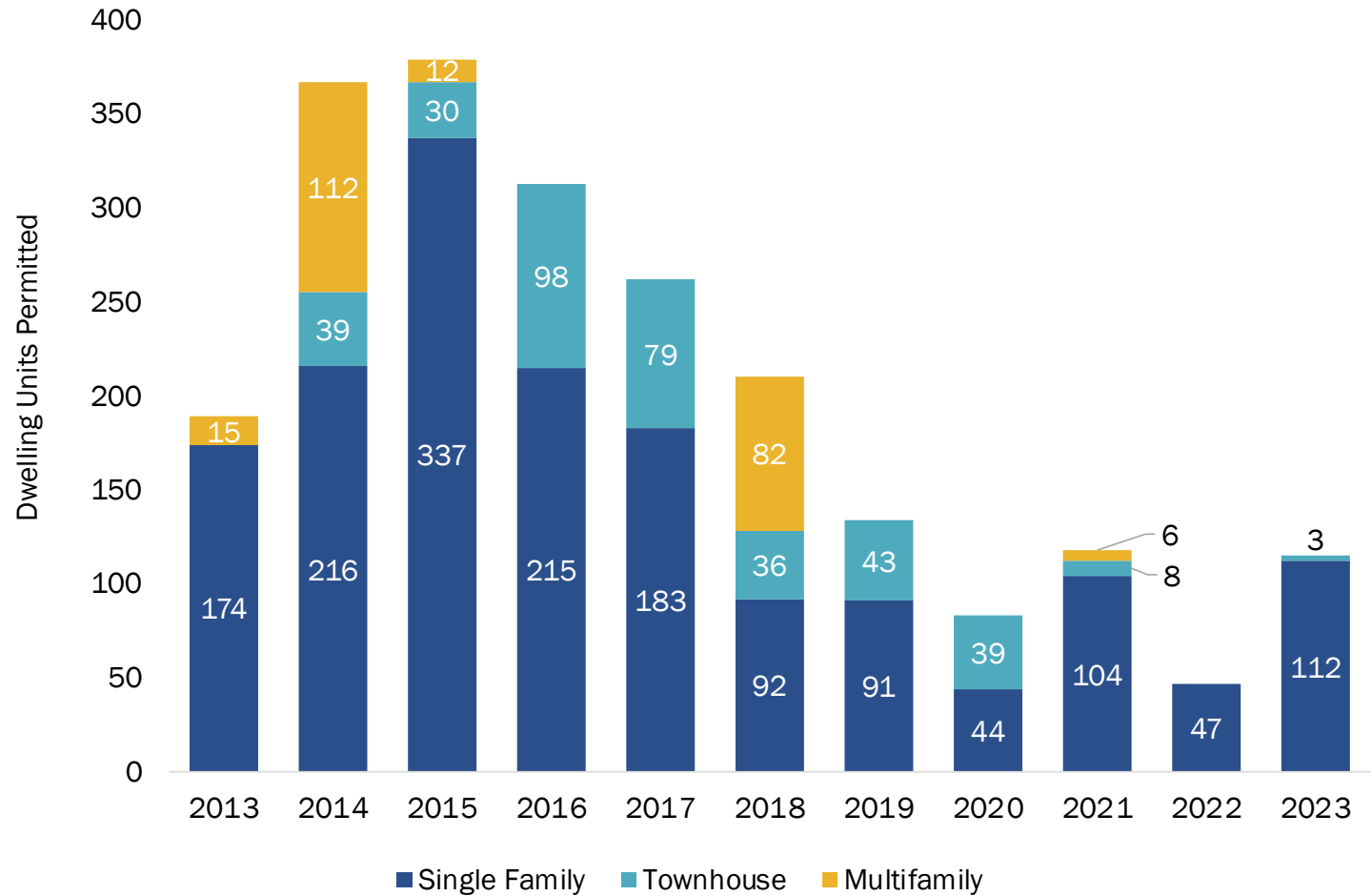


Building Permits Issued in Wilsonville, 2013-2023

Total dwelling units: 2,217

- Single-Detached units: 73%; 1,615 units permitted
- Townhouses: 17%; 375 units permitted
- Multifamily units: 10%; 227 units permitted

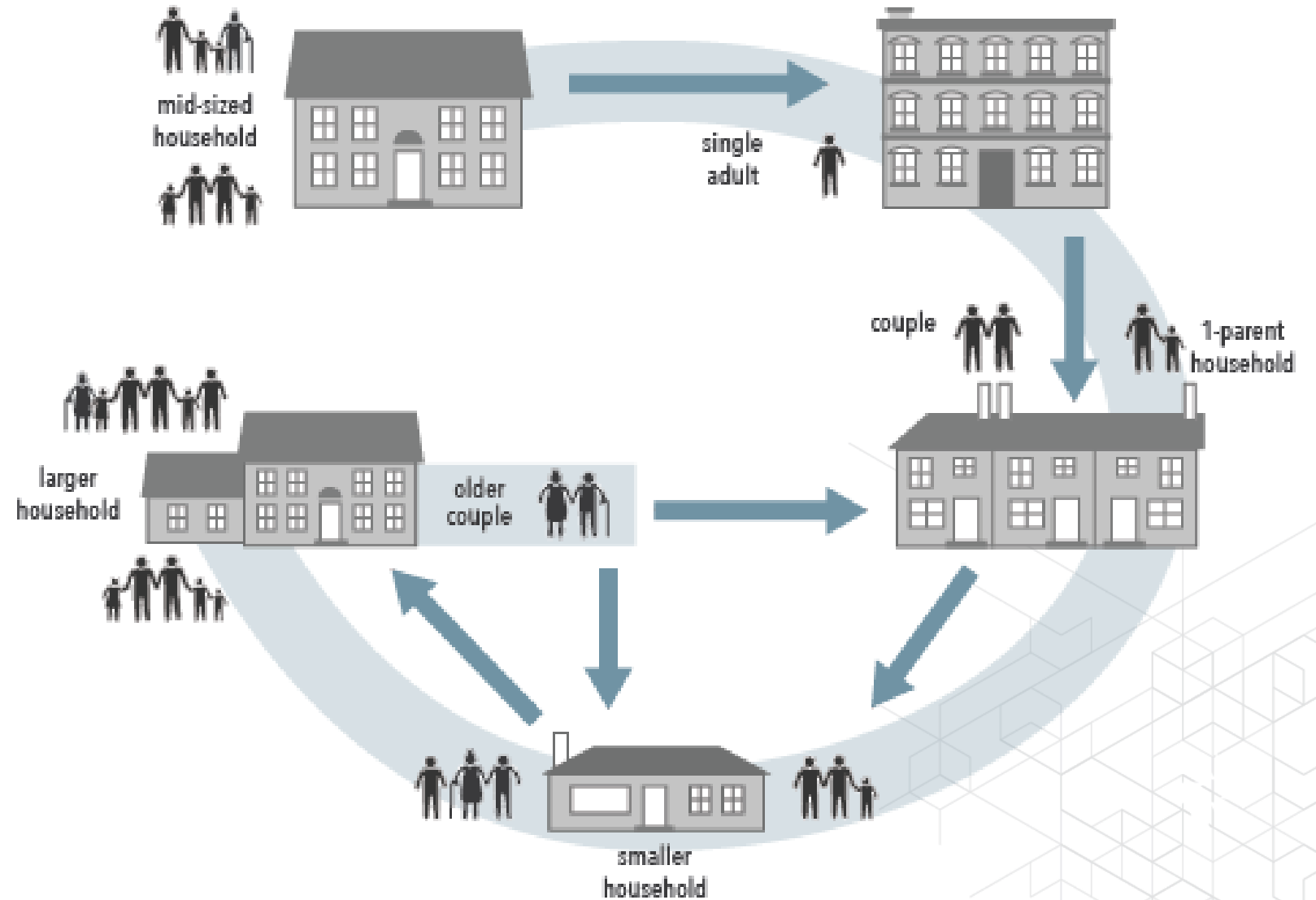
Average units permitted per year: 222



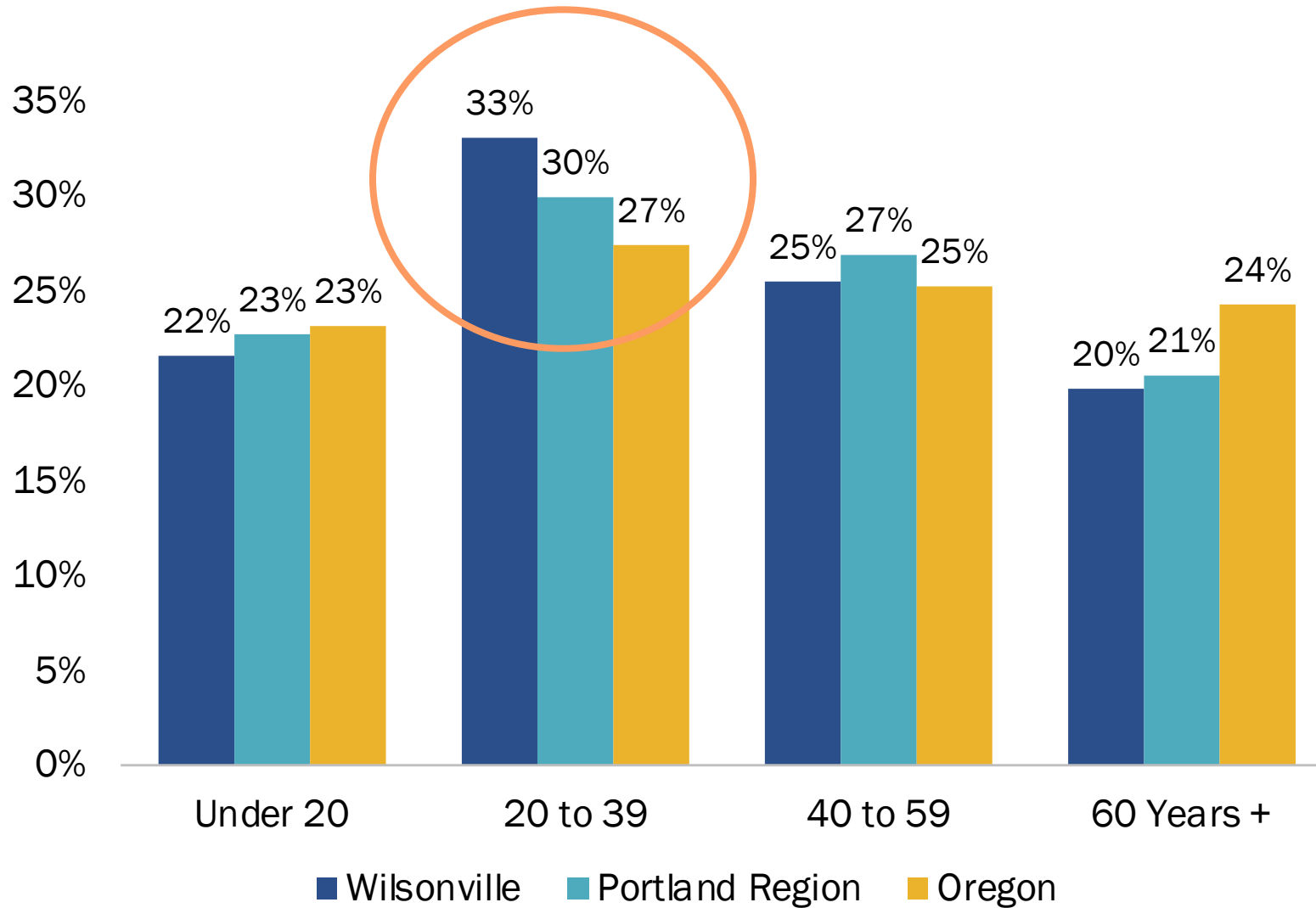
Source: City of Wilsonville Building Permit Database

Factors that Affect Housing Demand

- Age
- Household Composition
- Income



Population Distribution by Age

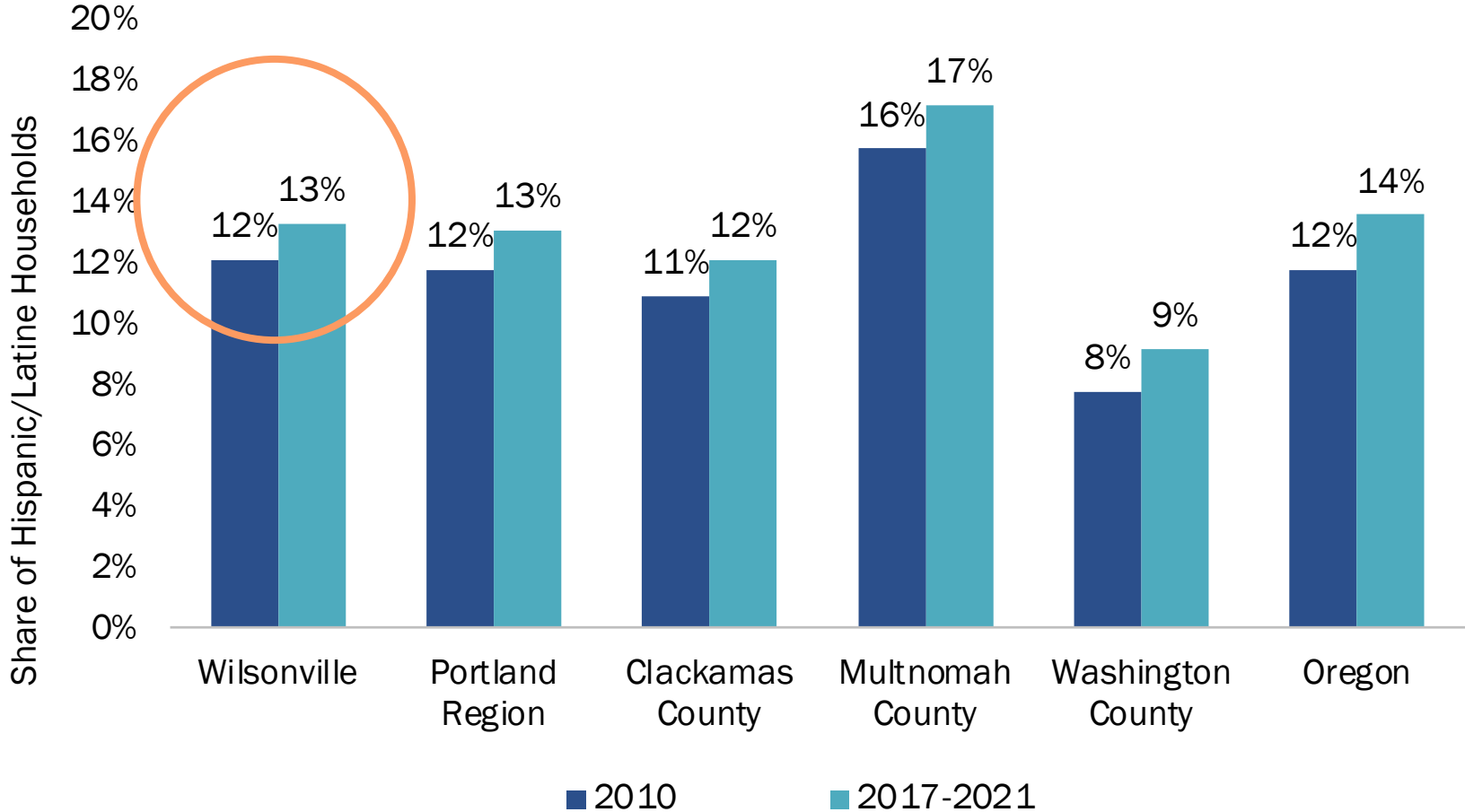


Wilsonville has a larger working age population.

People 20 to 39 years account for 33% of Wilsonville's population.

Source: US Census Bureau, 2000 Decennial Census Table P012 and 2017–2021 ACS, Table B01001 .

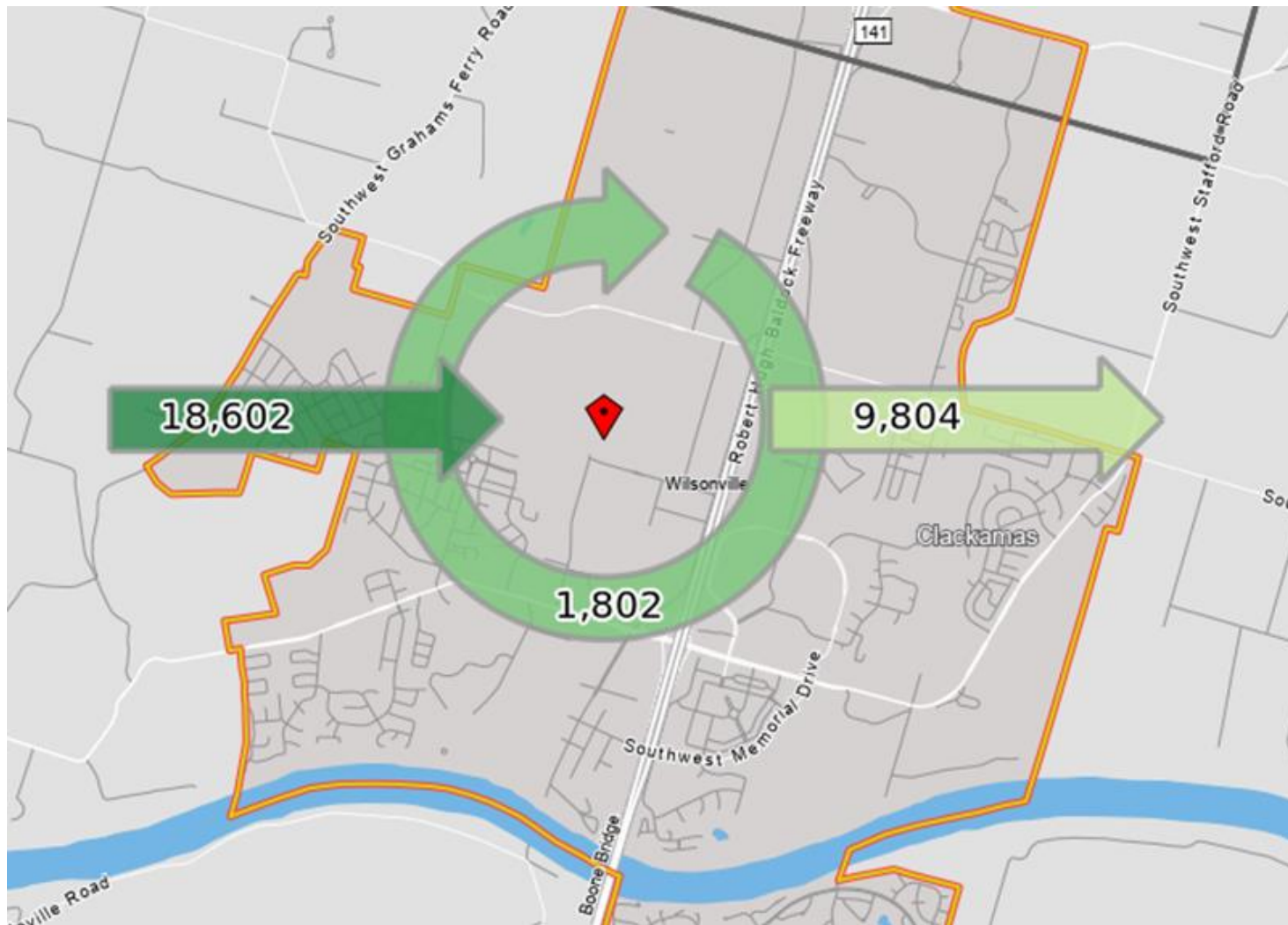
Share of Latine Households



Wilsonville's Latine population grew by 1,073 people between 2010 and 2021

Source: U.S. Census, Decennial Census 2010 and ACS 2017-2021, Table P008 and B03002.

Commuting Flows

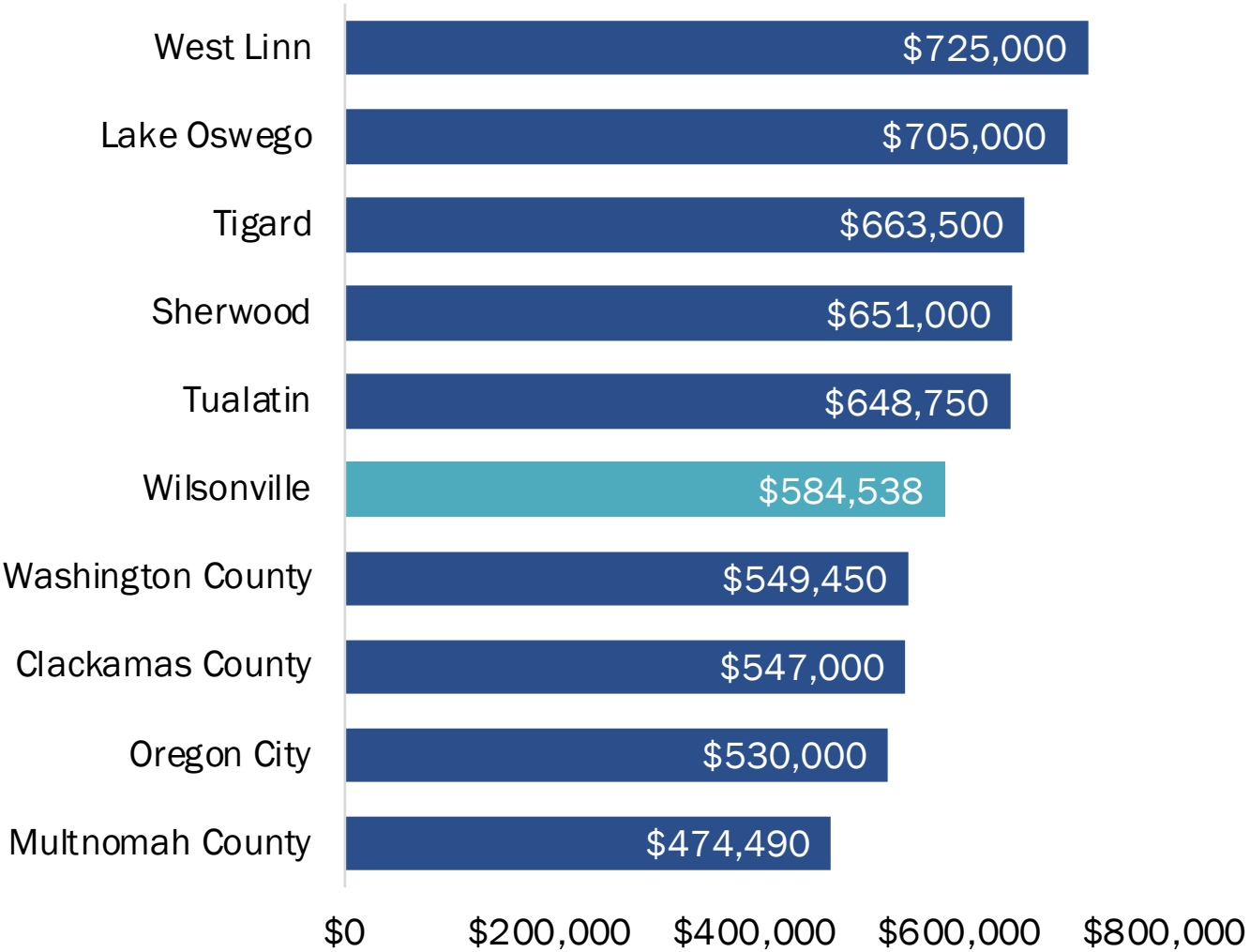


About 20,400 people work in Wilsonville

Most of these people (18,602) commute into Wilsonville for work.

Source: US Census Bureau, Census on the Map, 2019.

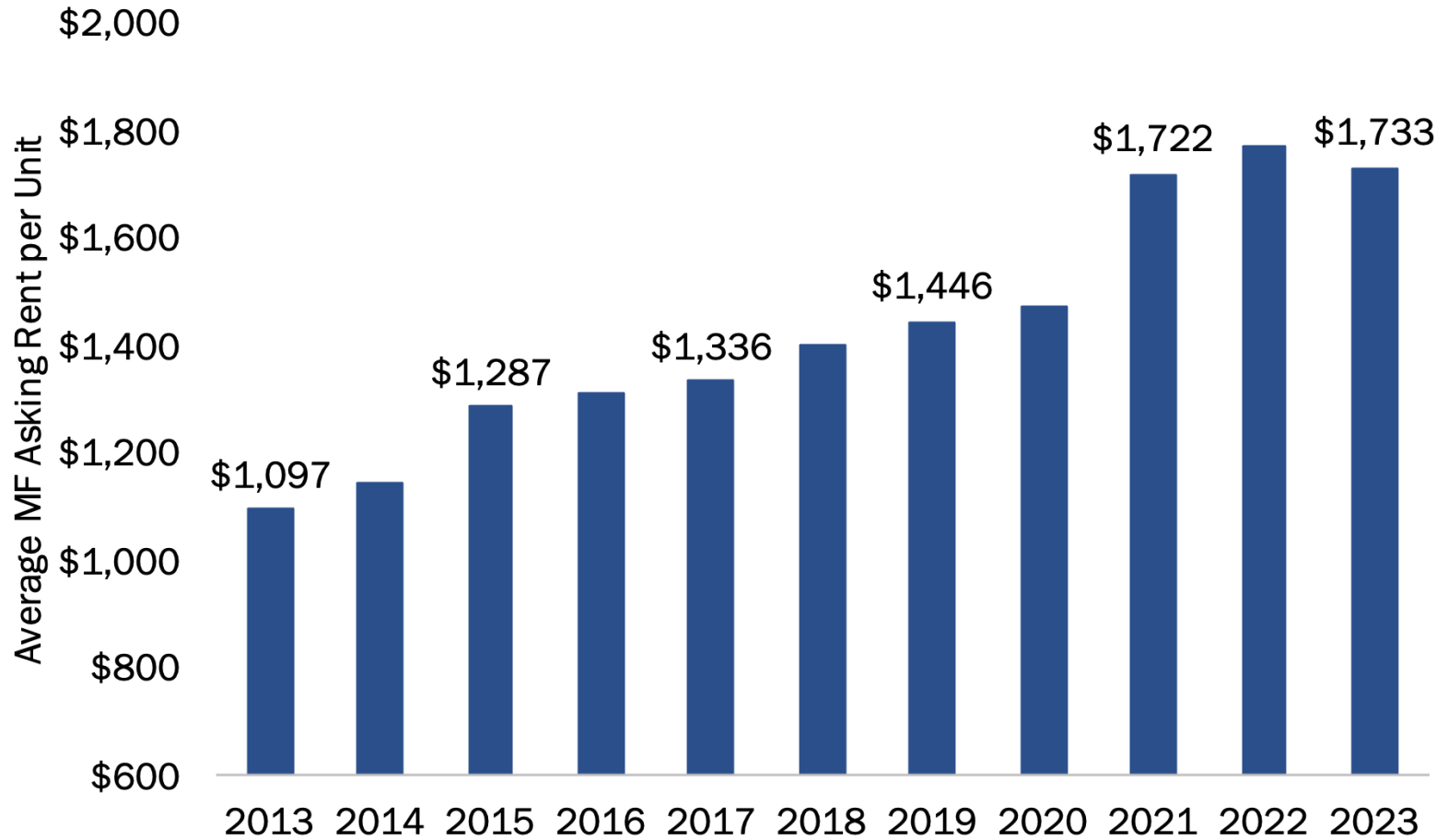
Median Home Sales Price



Between January 2014 to January 2024, the median home sales price in Wilsonville increased by \$245,000 (72%) from \$340,000 to \$585,000

Source: Redfin, January 2024

Monthly Average Asking Rents in Wilsonville, 2013-2023

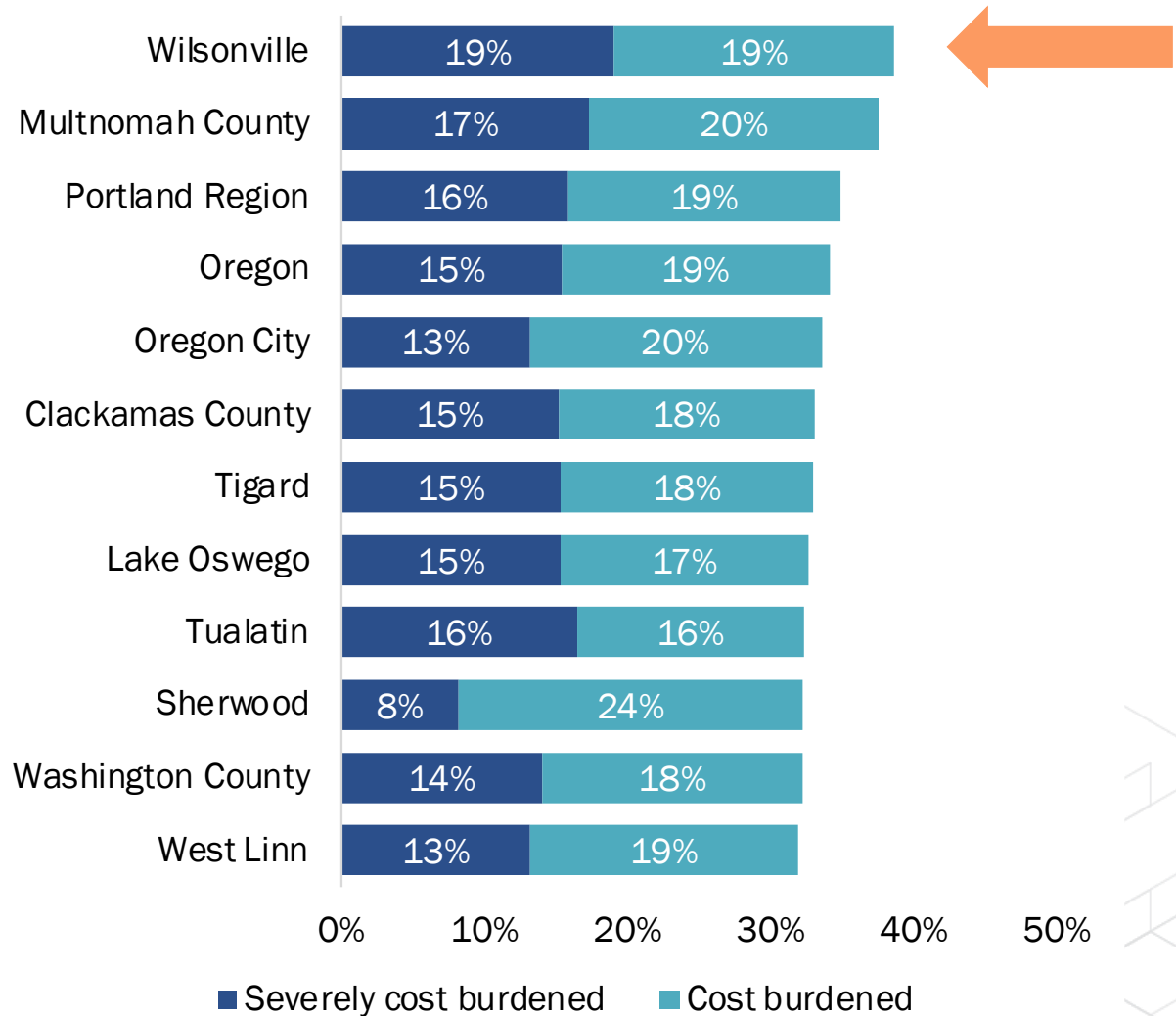


Source: Costar, pulled March 2024

Between 2013 and 2023, Wilsonville's average multifamily asking rents increased by 58% (\$636) to \$1,733 per month, not including utility costs.

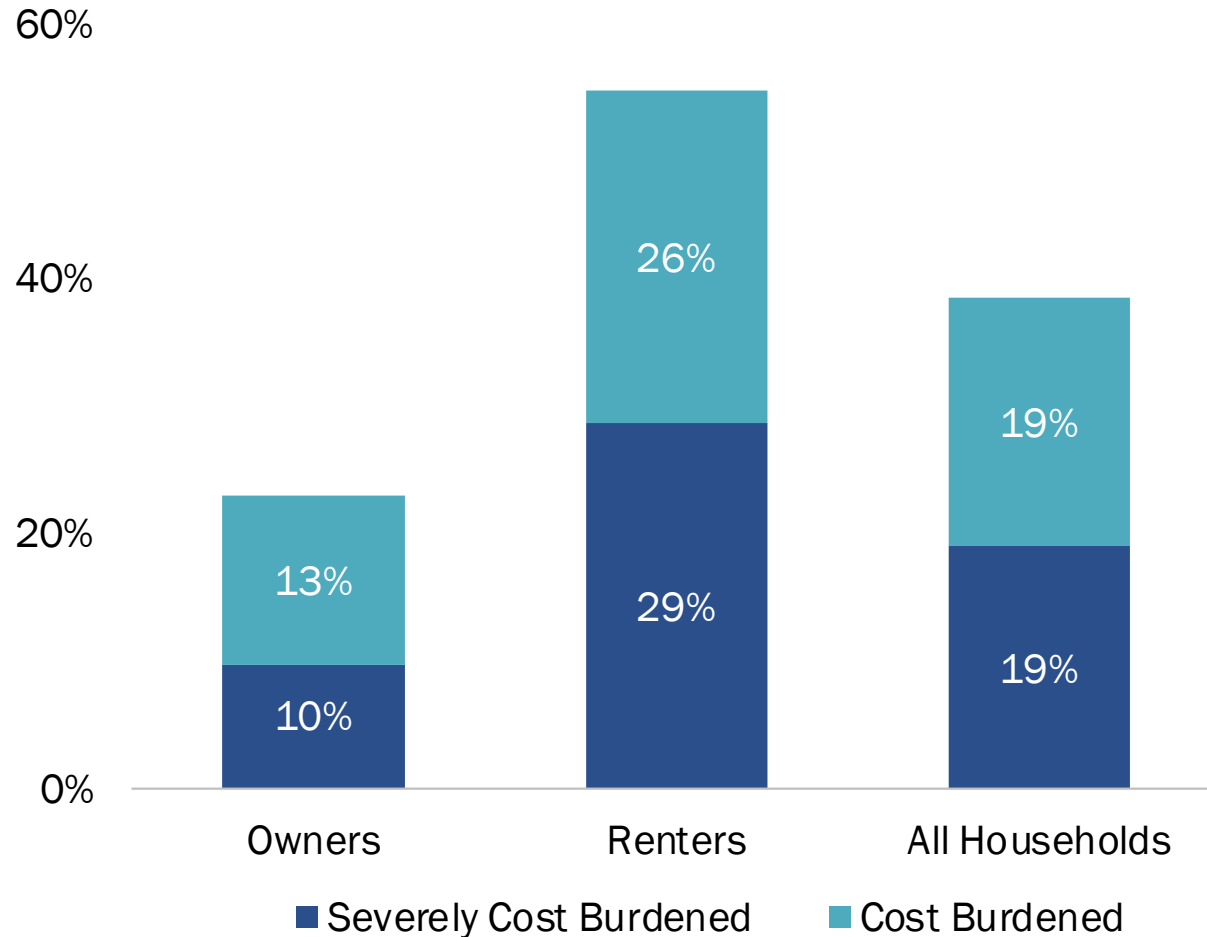
Cost burdened: spending more than 30% of income on housing costs

Severely cost burdened: spending more than 50% of income on housing costs



Source: U.S. Census, American Community Survey 2018-2022, Tables B25091 and B25070

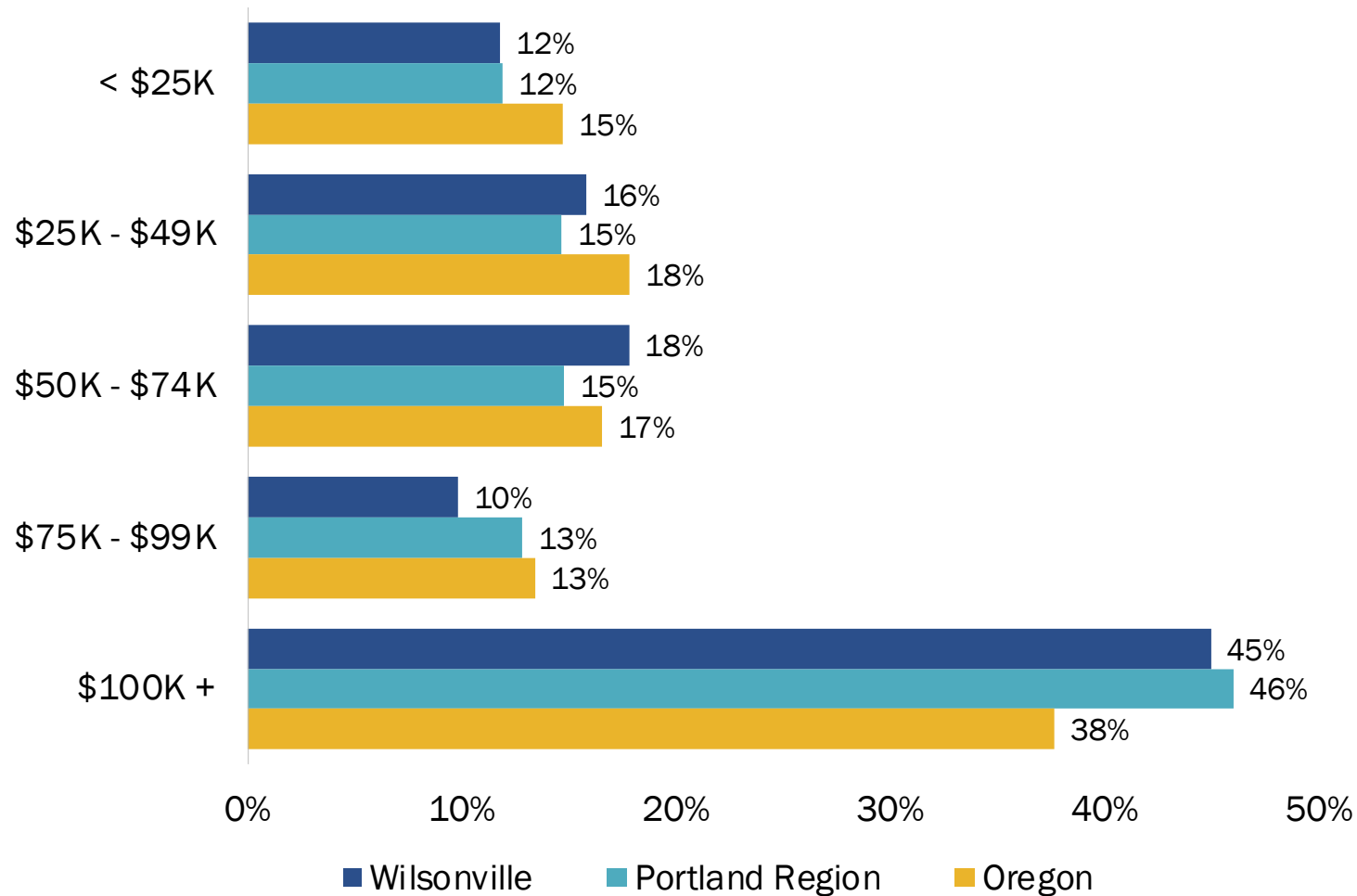
Cost Burden by Tenure, Wilsonville



About 55% of Wilsonville's renters were cost burdened or severely cost burdened, compared to 23% of homeowners.

Source: U.S. Census, ACS 2018-2022, Tables B25091 and B25070

Household Income Distribution



Median Household Income 2017-2021

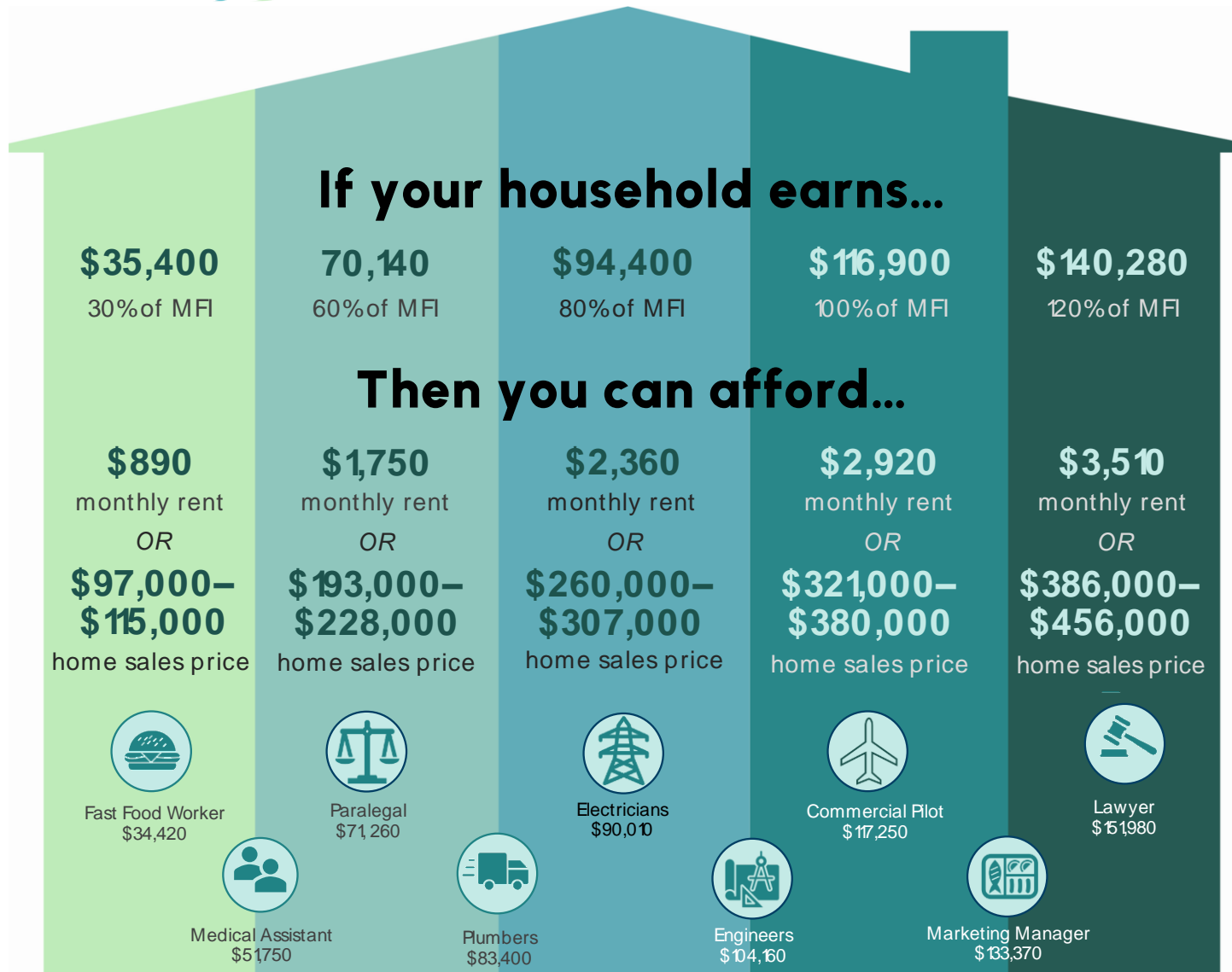
Wilsonville:
\$83,210

Clackamas County:
\$95,740

Oregon:
\$76,632

Source: U.S. Census, ACS 2018-2022, Table B19001 and B25119.

Financially Attainable Housing, Wilsonville



Median Home Sale Price: **\$585,000**

(Redfin, Jan 2024)

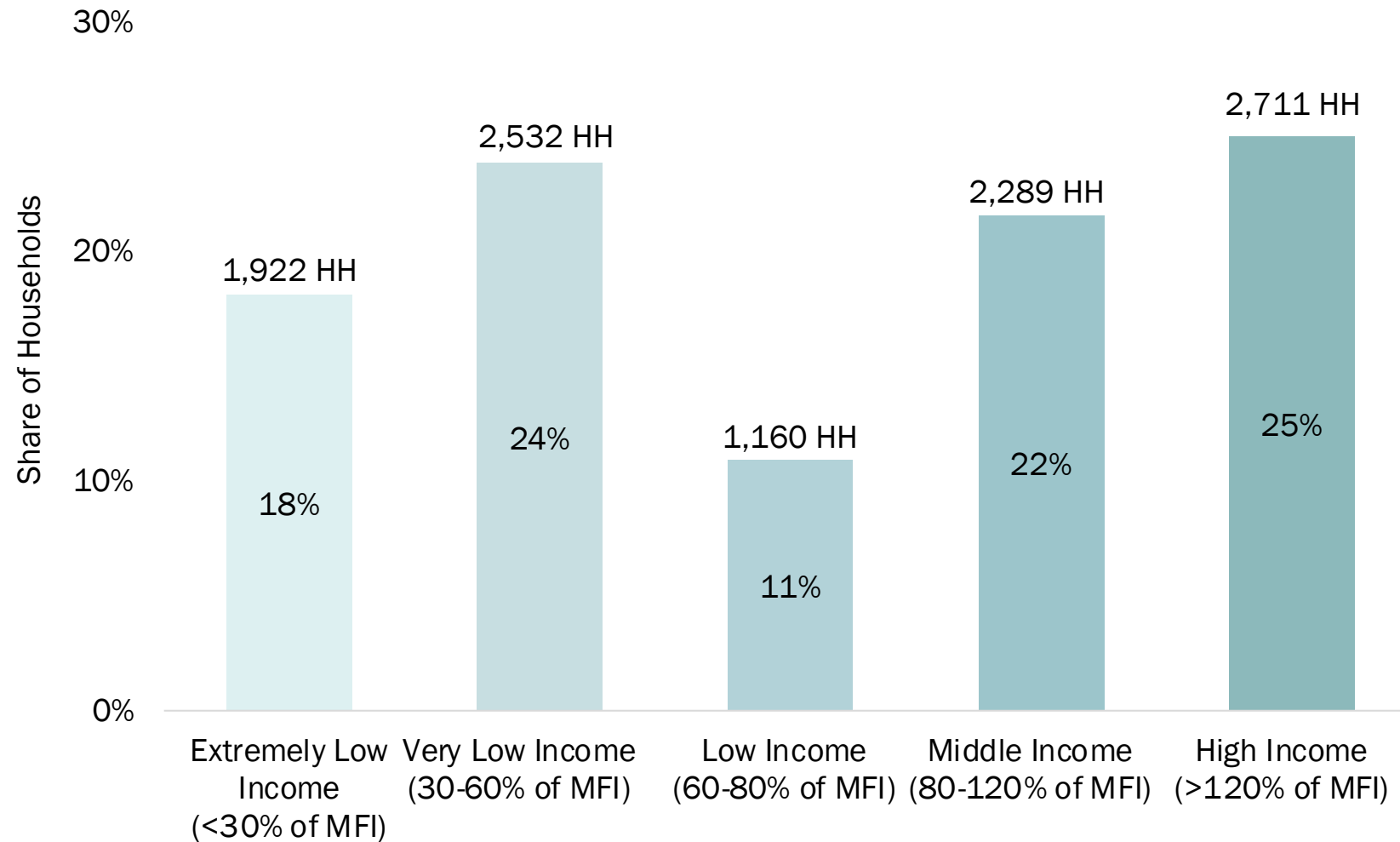
Requires \$180,000 income (154% of MFI) to afford

Average Monthly Rent: **\$2,000**

(Costar 2023 - \$1,733 average asking rent plus basic utilities)

Requires \$80,000 income (68% of MFI) to afford

Existing Households by Income Level, Wilsonville



This chart is based on the HUD MFI for the Portland MSA and the ACS household income distribution for Wilsonville.

Source: US Department of Housing and Urban Development, Portland MSA, 2024; 2018-2022 ACS Table 19001

Preliminary Housing Forecast & Land Sufficiency

Forecast of Housing Growth, Wilsonville, 2025-2045

If Wilsonville grows as the Metro's 2045 Household Distributed Forecast predicts, then Wilsonville would add **2,815 new households** by 2045.

Year	Wilsonville Planning Area
2025	10,843
2045	13,658
Change 2025 to 2045	
Number	2,815
Percent	26%
AAGR	1.2%

Forecast of New Housing, 2025 to 2045

Wilsonville is forecast to need **2,815 new dwellings**

Single-family
Dwelling
Detached



1,267

New Units
(45%)

Townhomes



422

New Units
(15%)

Duplex,
Triplex,
Quadplex



141

New Units
(5%)

Multi-family
Dwelling
(5+ units)



985

New Units
(35%)

Future planned residential densities vary by plan designation

Future Density for Housing Built in the Wilsonville UGB, 2025-2045

Comprehensive Plan Designation	Avg. Net Density (DU/net acre)	% for Rights-of-Way	Avg. Gross Density (DU/gross acre)
Residential 0-1 du/ac	0.5	15%	0.4
Residential 4-5 du/ac	6.4	25%	4.8
Residential 6-7 du/ac	7.7	20%	6.2
Residential 10-12 du/ac	14.0	16%	11.7

Estimate of Capacity of Land in Wilsonville Study Area, 2025-2045

Comprehensive Plan Designation	Total Unconstrained Buildable Acres	Density Assumption (DU/Gross Acre)	Capacity (Dwelling Units)
Residential 0-1 du/ac	4	0.4	1
Residential 4-5 du/ac	3	4.8	15
Residential 6-7 du/ac	14	6.2	83
Residential 10-12 du/ac	39	11.7	451
Village	2	N/A	42
Industrial	3	N/A	121
Total	64		713

Active Master Planned Areas	Total Planned Dwelling Units	Units Already Built	Remaining Units to be Built
Frog Pond East and South	1,587	-	1,587
Frog Pond West	571	271	300
Town Center	880	-	880
Total	3,038	271	2,767

Wilsonville has the capacity for 713 new dwelling units on land outside of active master planned areas.

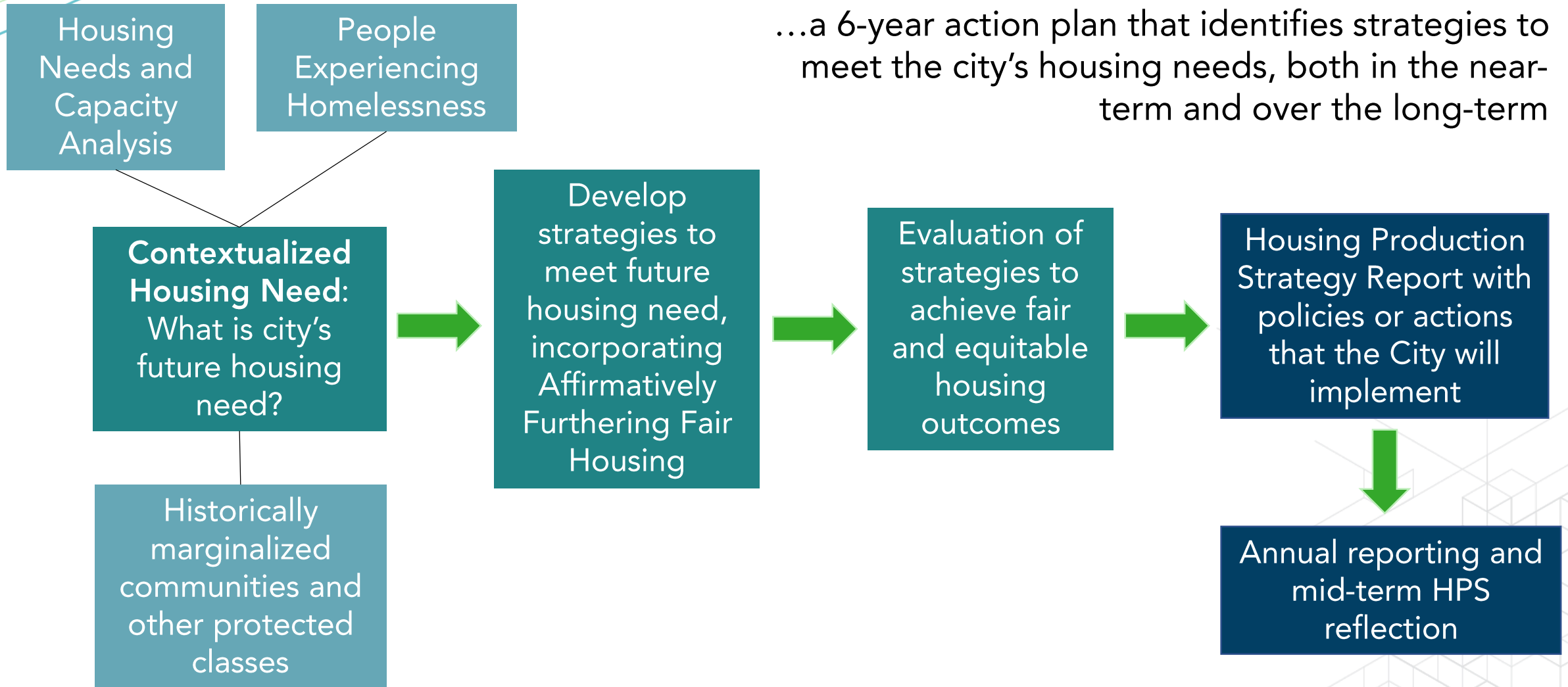
Wilsonville has capacity for about 2,767 new dwelling units in the Master Plan areas of Frog Pond and Town Center

Preliminary Conclusion: Wilsonville has enough land to accommodate growth with the largest “surplus” in Frog Pond East and South.

What questions or concerns do you have about the analysis or assumptions?

Next Steps

The Housing Production Strategy Steps are...



- Finish the HNCA
- Start on the Housing Production Strategy
- Stakeholder Interviews
- Joint PC/CC meeting: July 15th
- Next Task Force Meeting:
 - ◆ Potential Dates: 7/23, 7/24, 7/25, 8/6, or 8/7
 - ◆ Agenda: Discuss existing housing policies, barriers to accessing housing, and potential actions to overcome the barriers