



December 2, 2014

## Land Supply & Capacity- 2012 Update Summary

This memo summarizes the 2012 update of Eugene’s Buildable Lands Inventory and a refinement of the key land assumptions for Envision Eugene.

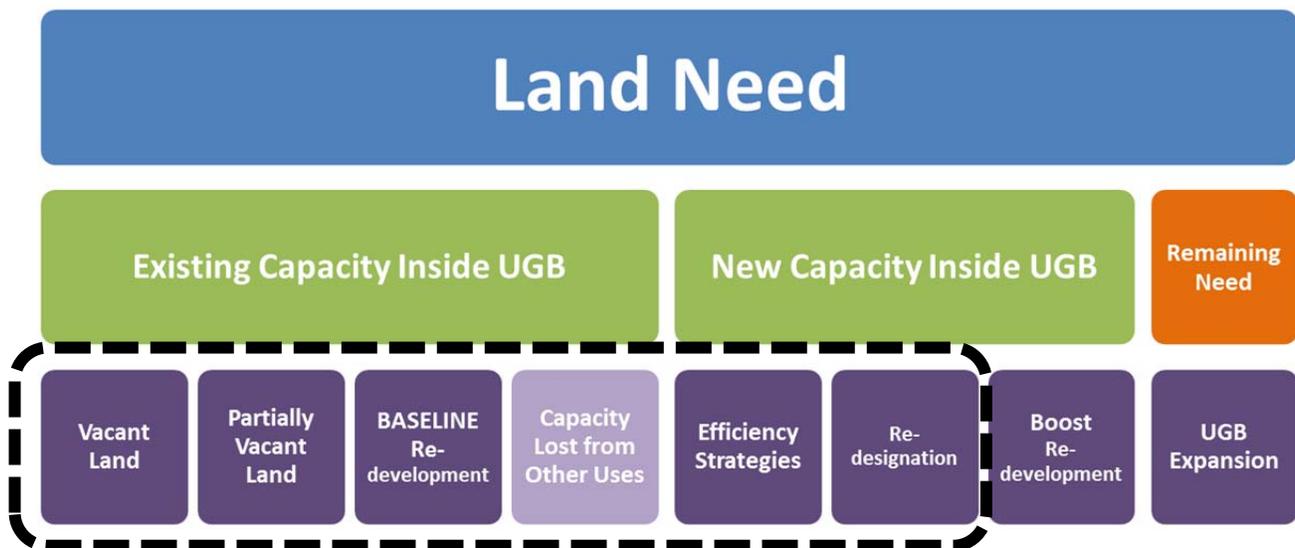
### Background

The March 2012 Envision Eugene Draft Recommendation presented the draft land need for housing, jobs, parks and schools for the next 20 years. The Draft Recommendation included how much of the future land need can be met in the following ways:

1. using existing buildable land capacity (e.g. vacant and partially vacant land) inside the urban growth boundary (UGB),
2. creating new capacity inside the existing UGB by implementing new strategies and actions to accommodate more homes and jobs, and
3. creating new capacity by expanding the UGB for the remaining land need.

This memo provides an update on how much of the future land need can be accommodated on existing buildable land inside the current UGB (bullet 1). This includes an update to the buildable land inventory of vacant, partially vacant and re-developable lands and a refinement of the development assumptions using recent data updates and the methodologies developed by the Envision Eugene Technical Resource Group (TRG).

The updated elements of Eugene’s land supply and capacity are shown inside the black dotted line in the graphic below. Staff has been working with the TRG (Technical Resource Group) to verify the accuracy of the updated information and analysis. Comments received from TRG members have been incorporated into the material presented here.



The updated land inventory and capacity analysis shows that more homes and jobs can be accommodated on our existing buildable lands than was estimated in the 2012 Recommendation, for reasons outlined below. This means that fewer homes and jobs need to be accommodated through efficiency strategies, re-designation, or UGB expansion. The estimates for the efficiency strategies adopted to date are included here.

### Factors Affecting the Land Supply & Capacity

The March 2012 Draft Recommendation was based on land use data from 2001-2008. The inventory of buildable lands (Buildable Lands Inventory or BLI) and the key assumptions for land demand, supply, and capacity have been updated to include data from 2009-2012. It is important to note the methodologies that provided the basis for the key assumptions have not changed since the Draft Recommendation. Only the supporting data has been updated to reflect recent information. In summary, the updates include:

- Buildable Lands Inventory- The supply of vacant (“developable”) and partially vacant sites (larger lots with more development capacity) has been updated to reflect development that has occurred through 2012.
- Residential land assumptions- Several of these were updated based on recent U.S. Census data and by incorporating recent development trends from 2009-2012. Examples of changes include:
  - The density assumptions (number of new dwellings per acre) for determining the capacity of land for new dwellings increased as a result of incorporating recent development trends. See Housing Density table below.
  - The amount of new homes assumed to be provided on Low Density, Medium Density and High Density Residential land through redevelopment increased as a result of incorporating recent development trends.
  - The projected amount of new multi-family student housing to be provided on Commercial land through redevelopment decreased based on the University of Oregon’s recent projection of no student growth in the next 10 years.
  - The number of persons assumed per household decreased slightly based on U.S. Census data (which then slightly increased the number of homes to plan for).

Housing Density										
Structure type	Dwelling Units on Lots with Development Between 2001-2012			Net Acres	Du / Net Ac	ECLA Average	Difference	2009-2012		
	Pre-existing DU	All DU Built 2001-2012	Total DU							
Single-Family Detached	1,288	5,058	6,346	1,168	5.4	5.4	0.0	5.6		
Single-Family Attached	5	684	689	34	20.5	20.2	0.3	31.4		
Structure with 2 to 4 units	227	576	803	77	10.4	8.6	1.8	14.1		
Structure with 5+ units	831	1,653	2,484	102	24.4	24.1	0.3	24.8		
<b>Total</b>	<b>2,351</b>	<b>7,971</b>	<b>10,322</b>	<b>1,380</b>	<b>7.5</b>	<b>7.2</b>	<b>0.3</b>	<b>8.2</b>		

Note: Density includes new units and units built on a tax lot before the analysis, where there was new development 2001-2012

Plan Designation	Average Density (dwelling units per net acre)					ECLA Average	Difference	2009-2012
	Single-Family Detached	Single-Family Attached	Structure with 2 to 4 units	Structure with 5+ units	Average			
Low Density Residential	5.3	35.5	7.1	8.3	5.4	5.2	0.2	5.9
Medium Density Residential	7.9	16.6	12.3	18.1	13.4	13.2	0.2	14.6
High Density Residential	15.4	35.0	30.7	35.0	32.6	31	1.6	36.0
Medium Density Residential Mixed Use	4.5	na	26.4	39.5	20.4	17.1	3.3	na
High Density Residential Mixed Use	5.8	na	na	na	5.8	5.8	0.0	34.8
Mixed Use	8.5	na	5.9	na	7.2	7.2	0.0	na
<b>Total</b>	<b>5.4</b>	<b>20.5</b>	<b>10.4</b>	<b>24.4</b>	<b>7.5</b>	<b>7.2</b>	<b>0.3</b>	<b>8.2</b>

- Employment land assumptions- In general, these were not revisited because the most recent and available data is already being used. However, the Oregon Department of Employment provided a new 10 year employment forecast of 1.43%. The analysis was updated to assume this growth rate for the 20 year period, which increased the employment demand slightly.
- Public & semi-public land assumptions- The public land assumptions were not revisited because the most recent available data is already being used. The semi-public land assumptions were revisited but the resulting demand for these uses did not change.

### **Updated Land Capacity**

Many of the factors described above impact the projected land need for the next 20 years, to varying degrees. The overall amount of homes and jobs that need to be accommodated in 20 years changed only slightly; the bigger changes are in how and where the development is expected to occur. Some updates impact the supply of buildable land across the city while others impact the capacity of the buildable land or the demand for land. The result is an updated land supply and capacity estimate for Low Density, Medium Density and High Density Residential lands, and for Commercial lands.

The following graphics illustrate how the different ways in which dwellings and jobs are accommodated have shifted from the March 2012 Draft Recommendation based on these updates.

## Low Density Residential (LDR)

The assumed capacity of land inside the UGB increased. An increase in capacity inside the UGB decreases the number of homes to be accommodated through efficiency strategies or UGB expansion. Some of the factors affecting this capacity include:

- The average density assumed for vacant and partially vacant land increased, and had a significant effect city-wide (3.2 vs. 2.8 du/ac)
- The supply of vacant buildable acres remained about the same (about 1,350 below 900') due to methodology refinement and offsets such as demolitions creating vacant lots
- The BLI includes more, smaller lots (less than 1 acre in size) than before (436 vs. 295 ac). These smaller lots are assumed to have capacity for a higher amount of dwellings per acre than larger lots do
- The number of dwellings assumed to occur above 900' elevation increased by 40 due to subdividing. Since one dwelling is assumed per lot above 900', the subdivision of larger lots increased the number of new dwellings assumed above 900'
- The baseline estimate increased due to including a projection for a baseline number of secondary dwelling units to occur
- Efficiency strategy estimates decreased due to actual adopted changes

### March 2012 Draft Recommendation Estimate

## Low Density Residential Need

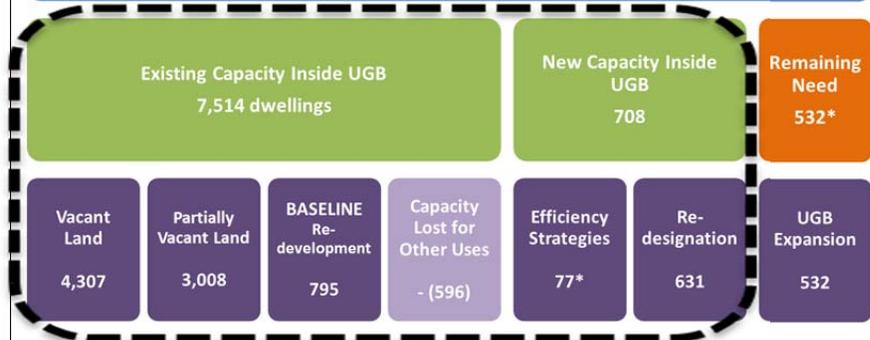
@ 55/45 mix = 8,682 dwellings



### Updated Land Capacity Estimate

## Low Density Residential Need

@ 55/45 mix = 8,754 dwellings



\* Includes deductions for interim protection measures in neighborhoods surrounding U of O.

## Medium & High Density Residential (MDR & HDR)

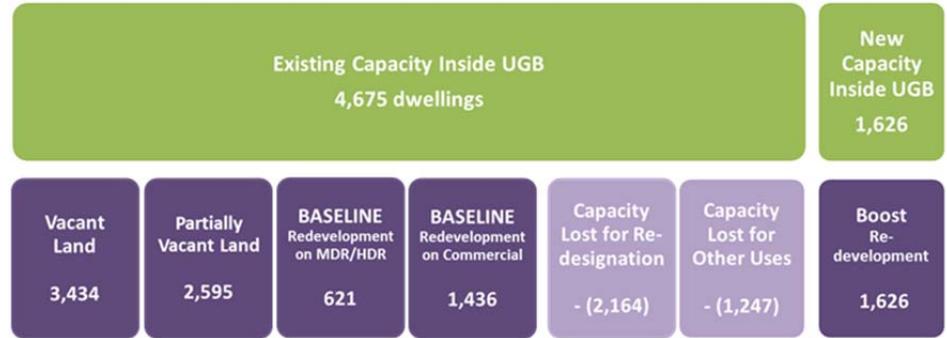
The assumed capacity of land inside the UGB increased. Therefore, the number of remaining dwellings to accommodate through interventions to boost re-development decreased slightly. Some of the factors affecting this result include:

- The average density assumed for vacant and partially vacant land increased (MDR 11.1 vs. 10.7, HDR 23.5 vs. 21.3)
- The amount of dwellings seen through baseline re-development decreased due to removing student housing re-development projects from the per year factor (MDR 10.6 vs 12.6, HDR 12.3 vs. 18.4 du/yr)
- The amount of dwellings seen through baseline re-development on Commercial land decreased significantly due to lower University student growth projections (e.g. no net growth projected)
- The capacity lost on MDR land due to re-designation decreased based on actual adopted changes

### March 2012 Draft Recommendation Estimate

## Medium & High Density Residential Need

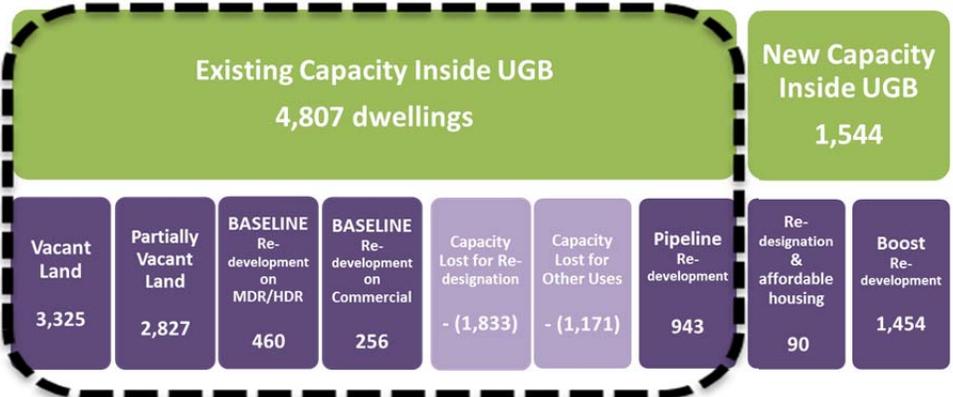
@ 55/45 mix = 6,301 dwellings



### Updated Land Capacity Estimate

## Medium & High Density Residential

@ 55/45 mix = 6,351 dwellings



**Commercial**

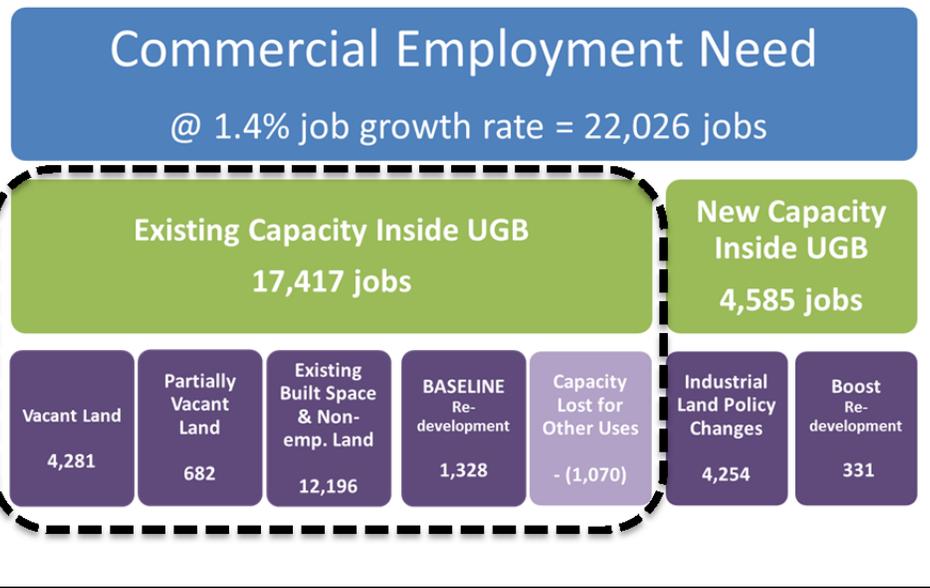
The capacity of land inside the UGB increased slightly. This increase therefore slightly reduced the number of jobs remaining to accommodate through interventions that boost re-development. Some of the factors affecting this include:

- The demand increased slightly due to using the new OED job growth rate (1.43% vs 1.4%), which in turn increased all of the job assumptions, and the amount of jobs needed to be accommodated by creating new capacity inside the UGB
- The amount of vacant land (108 vs 99 ac) and partially vacant land (17.2 vs 14.2 ac) increased slightly which increased the capacity of these lands
- The baseline redevelopment capacity decreased significantly due to a lower medical office demand forecast from OED, which are jobs assumed to occur without city intervention

**March 2012 Draft Recommendation Estimate**



**Updated Land Capacity Estimate**



**Industrial**

The surplus of sites < 10 ac in size decreased slightly, however because the need for industrial land is in the larger site size categories (10 acres and larger), the overall Industrial land need has not changed significantly.

Regarding the large site need:

- The remaining number of sites needed decreased from 12 to 11 based on updating the methodology
- The remaining total average buildable acres needed increased slightly due to calculating the acres based on the numerical midpoint within each site size range rather than previous assumptions

**March 2012 Draft Recommendation Estimate**

Site size (Suitable Acres)	Site sufficiency	Average site size (suitable acres)	Average suitable Gross Acres Needed
10 to 20 acres	(5)	15	(75)
20 to 50 acres	(2)	25	(50)
50 to 75 acres	(3)	60	(180)
75 acres and larger	(2)	85	(170)
<b>Total</b>	<b>(12)</b>		<b>(475)</b>

**Updated Land Capacity Estimate**

Site size (Suitable Acres)	Site sufficiency	Average site size (suitable acres)	Average Suitable Gross Acres Needed
10 to 20 acres	(4)	15	(60)
20 to 50 acres	(2)	35	(70)
50 to 75 acres	(3)	63	(189)
75 acres and larger	(2)	88	(176)
<b>Total</b>	<b>(11)</b>		<b>(495)</b>

**Parks & Schools**

The public land needed outside of the current UGB for parks and schools changed slightly:

- The park needed increased (257 vs. 242 acres) due to recent city acquisition of land adjacent the future Santa Clara Community Park location
- The school need decreased (54 vs 80 acres) based on the documented need in the Bethel School District facilities plan

**March 2012 Draft Recommendation Estimate**

Public Agency	Expansion Need	Expansion amount
Bethel School District	New School- to address increasing enrollment projections	80 acres
City of Eugene	Golden Gardens Community Park- to develop to urban standards	223 acres
City of Eugene	Santa Clara Community Park- to develop to urban standards	19 acres
<b>TOTAL</b>		<b>322 acres</b>

**Updated Land Capacity Estimate**

Public Agency	Expansion Need	Expansion amount
Bethel School District	New School- to address increasing enrollment projections	54 acres
City of Eugene	Golden Gardens Community Park- to develop to urban standards	222 acres
City of Eugene	Santa Clara Community Park- to develop to urban standards	35 acres
<b>TOTAL</b>		<b>311 acres</b>