

CITY OF ASHLAND

Buildable Lands Inventory



2019

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Department of Community Development

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Acronyms used in this Document

BLI	Buildable Lands Inventory
DLCD	Department of Land Conservation & Development
EOA	Economic Opportunity Analysis
FEMA	Federal Emergency Management Agency
GIS	Geographic Information System
HDR	High Density Residential
HNA	Housing Needs Analysis
LDR	Low Density Residential
MFR	Multi-Family Residential
OAR	Oregon Administrative Rule
ORS	Oregon Revised Statute
PPH	Persons per Household
SFR	Single Family Residential
SR	Suburban Residential
UGB	Urban Growth Boundary



2019 Buildable Lands Inventory

Introduction

The purpose of conducting an update of the “Buildable Lands Inventory” (BLI) is to quantify the amount vacant and partially-vacant land available within the political boundaries of the City of Ashland (City Limits and Urban Growth Boundary). In combination with a Housing Needs Analysis, and an Economic Opportunities Analysis, a BLI allows a community to determine whether or not there exists an adequate supply of buildable land to accommodate future housing and business development.

The BLI is prepared in accordance with OAR 660-24-0050(1) requiring that cities maintain a buildable lands inventory within the urban growth boundary (UGB) sufficient to accommodate the residential, employment and other urban uses such as public facilities, streets, parks and open space needed for a 20-year planning period. The BLI is effectively an analysis of development capacity. The use of the City’s geographic information systems (GIS) enables the City to evaluate development potential using 4 basic steps:

1. Identify developed property throughout the City and Urban Growth Boundary
2. Calculate development potential in terms of number of future single-family residential lots, multifamily housing units, and available commercial lands.
3. Identify development parcels that significantly underutilize their allowed (or proposed) development capacity;
4. Quantify physical constraints to development (steep slopes, floodplains, etc) to refine estimated development capacity on a parcel by parcel basis.

If it is determined that future population growth, or economic development, will require more buildable land than is available, the community’s governing bodies can make informed decisions, and implement appropriate measures to provide for the unmet housing and commercial land needs. As a companion document to the BLI the Housing Needs Analysis (HNA) provides data necessary to determine the mix of housing types will be needed to accommodate population growth and demographic changes. The City completed a Housing Needs Analysis in 2012. In combination with this BLI, the 2012 HNA, and any future updates, will allow the City to assess whether the supply of available residential land is sufficient to accommodate each needed housing types through the 20-year planning period.

Section 1: Buildable Land Inventory

Land Use Classifications

The BLI maintains an accounting of all lands within Ashland's Urban Growth Boundary (UGB) by Comprehensive Plan designation and by zoning designation within the city limits. Each City zone relates to a specific Comprehensive Plan designation as shown below. The BLI provides an assessment of buildable land for both the Comprehensive Plan and Zoning designations.

Comprehensive Plan	Zoning
Suburban Residential	Residential - Suburban (R-1-3.5)
Single Family Residential	Residential - Single-family (R-1-10, R-1-7.5, R-1-5)
Low Density Residential	Residential Low Density (R-1-10) Residential - Woodland (WR) Residential - Rural (RR)
Multi-Family Residential	Residential - Low Density Multiple Family (R-2)
High Density Residential	Residential - High Density Multiple Family (R-3)
Commercial	Commercial (C-1)
Downtown	Commercial - Downtown (C-1-D)
Employment	Employment (E-1)
Industrial	Industrial (M-1)
Health Care	Health Care Services Zone (HC)
Croman Mill	Croman Mill District Zone (CM) includes various district zones (CM-NC, CM-MU, CM-OE, CM-CI, CM-OS)
Normal Neighborhood	Normal Neighborhood District (NN) includes various district zones (NN-1-3.5, NN-1-3.5 C, NN-1-5, NN-2)
North Mountain Neighborhood	North Mountain Neighborhood (NM) includes various district zones (NM-R-1-7.5, NM-R-1-5, NM-MF, NM-C, NM-Civic)
Southern Oregon University	Southern Oregon University (SOU)
City Parks	Various zones
Conservation Areas	Various zones

The residential densities used to determine the number of dwelling units expected per acre of land for all zones and Comprehensive Plan designations is provided in Table 1.

Table 1: Residential Density

Zone	Assumed Density	Type
R-1-3.5	7.2 units per acre	Suburban Residential (SR), Townhouses, Manufactured Home
R-1-5 & R-1-5-P	4.5 units per acre	Single-Family Residential (SFR)
R-1-7.5 & R-1-7.5-P	3.6 units per acre	Single-Family Residential (SFR)
R-1-10 & R-1-10-P	2.4 units per acre	Single-Family Residential (SFR)
R-2	13.5 units per acre	Multi-Family Residential (MFR)
R-3	20 units per acre	High Density Residential (HDR)
RR-.5 & RR-.5-P	1.2 units per acre	Rural Residential, Low-Density (LDR)
HC	13.5 (as R-2)	Health Care
WR	Slope contingent	Woodland Residential
RR-1	0.6 units per acre	Rural Residential, Low-Density (LDR)

Definitions and common terms

The following definitions were used in evaluating land availability:

Buildable Land

Residentially and commercially designated *vacant*, *partially vacant*, and, at the option of the local jurisdiction, *redevelopable* land within the urban growth boundary that is not severely constrained by natural hazards, (Statewide Planning Goal 7) or subject to natural resource protection measures (Statewide Planning Goals 5 and 15).

Publicly owned land is generally not considered available for residential use. Land with slopes of 35-percent or greater and land within the 100-year flood plain was not considered buildable in conducting this BLI. For the purposes of updating the Buildable Lands Inventory, “redevelopable lands” as defined below were not included as “Buildable Land”. This is consistent with the methodology used in the 1999, 2005, and 2011 Buildable Lands Inventory’s methodologies for identifying properties with additional development potential. Properties considered “Redevelopable” that otherwise had further development potential, were included instead in the “Partially Vacant” category in order to capture that net buildable land area.

Residential Density

The number of units per acre (density) for residential properties with development potential was determined by referencing the base densities established in the City’s zoning ordinance. The density allowance coefficient (e.g. 13.5 dwelling unit per acre in

the R-2 zone) was initially established to include accommodations for needed public facilities land, thus a “gross buildable acres”- to- “net buildable acres” reduction, specifically to accommodate future public facilities, has been omitted.

Vacant:

Vacant lots were those parcels that were free of improvements (structures) and were available for future residential or commercial development. Alternative designations were assigned to those parcels that, although physically vacant, were not considered suitable for residential or commercial development.

Vacant/Undevelopable = Unbuildable acres due to physical constraints including:

- 1) with slopes in excess of 35%
- 2) within the floodway
- 3) within the 100-year flood plain
- 4) in resource protection areas

Vacant/Airport = Land reserved for Ashland Municipal Airport uses.

Vacant/Open Space = land reserved as private open space

Vacant/Parks = land reserved as public parks and open space

Vacant/Parking = paved parking lots

Partially Vacant:

Partially vacant lots were determined to have buildable acreage if the lot size was equal to, or greater than, the minimum lot size requirements set for residential density [in each zone]. In Commercially zoned lands, those parcels with additional undeveloped land area yet containing a building on a portion of the property were likewise considered partially vacant. Collectively, these partially vacant parcels account for a considerable amount of Ashland’s future land supply.

For example, a five-acre parcel occupied by only one home is considered partially vacant, however the percentage of land that is available may be 80% due to the location of the existing home. Thus, in this hypothetical example, the partially vacant property would yield four acres of net buildable land.

Redevelopable:

Redevelopable property is traditionally defined as property on which there are structures valued at less than 30% of the combined value of the improvements and the land.

For example, were a building valued at \$100,000 located on a property with a land value of \$300,000 this property would be mathematically defined as re-developable: $\$100,000/(\$100,000+\$300,000) = 25\%$

Within Ashland, the high land cost relative to building valuations makes the above standard calculation method a poor indicator of future supply of land for housing and commercial land needs in our community. However, in mapping all such “redevelopable” properties utilizing the Jackson County Assessors Department’s Real Market Values

(RMV) for Land Value (LV) and Improvement Value (IV) the City was better able to identify many properties that were underdeveloped and more appropriately defined as “Partially Vacant”.

Land Inventory

The City of Ashland contains a grand total of 4,250 acres within the City Limits. The Urban Growth Boundary (UGB) contains a total of 4,732 acres. An area of 226 acres in the southwest corner of the city is inside the city limits but outside the UGB. For this reason, the combined total area of Ashland political boundaries is 4,958 acres. When dedicated public right-of-ways are removed, there remains 4,161 (84%) net acres within the City’s urban area¹.

Public rights-of-way, parks/open space and civic uses accounted for 27.8% of the City’s total gross acreage. The remaining land is classified as Residential (60.1%), commercial (11.4%), and industrial (0.4%).

Quantifying Land Availability & Methodology

The primary data sources used in order to determine the amount of land available within Ashland’s UGB included:

- 2010 Buildable Lands Inventory data and map
- Jackson County assessor parcel data (as of June 28, 2019)
- Citywide Aerial photos (taken in April of 2018)
- City of Ashland GIS database (for building footprints, slope, flood, and impervious areas)
- Ashland Building Permit data (April 1, 2011 – June 30, 2019)

Each of these data sources were used to closely examine properties designated as available and to identify physical or other constraints to future development. Properties were analyzed for their available buildable land, and to ascertain whether the property was suitable for further development.

Building Permit data, current as of June 30, 2019, was mapped to show all residential development that had occurred since April 1, 2011, the date of the last Buildable Lands Inventory’s dataset. Mapping the City’s building permit data further ensured an accurate accounting of lands represented as “vacant” in the Jackson County Assessor’s records, but for which building permits had already been issued. Properties that received building permits for new dwellings or commercial developments after June 30, 2019, but before the publication of this inventory, are included as an appendix to this document.

¹ ‘Within the City’s Urban Area’ includes both land within the City Limits and Urban Growth Boundary combined. If reference is being made to the UGB area exclusive of land within City Limits, we will refer to ‘UGB alone’.

In the 2019 BLI's GIS project, each parcel within the City and UGB has been categorized as one of the following:

- Developed =D
- Vacant = V
- Partially-Vacant = PV
- Undevelopable = UnDev
- In addition to the primary categories above there are several sub-types of vacant lands that were classified to indicate they are not available for future development such as Airport, Parks, Open space, parking lots, and other public or quasi-public land.

In general, a vacant parcel from the 2010 BLI was classified as developed if there was an existing building, or a recent building permit issued, unless the property was large enough to be further subdivided or able to support additional dwelling units due to multi-family zoning. If a property had previously been categorized as 'partially vacant' in the 2011 BLI, it was evaluated to determine the number of additional dwelling units (or sub-dividable lots) that currently could be provided. Properties that have received Planning approval for development within the last 18 months, but have yet to obtain building permit approval by June 30, 2019, are counted as buildable in this BLI. However, as they are likely to develop in the near term they have been categorized as 'Vacant-in process' in the 2019 BLI GIS project, and are listed in Appendix A.

Using the spatial analysis tools in the GIS, the area of each individual parcel that was constrained by steep slopes (over 35%), flood zones (FEMA 100yr. floodplain), and impervious surface was calculated to better assess the likely level of future development on the property. The resultant figure was called 'Net Buildable Acres' and informed an adjustment to the number of dwelling units (Adjusted DU) in the tables provided in this inventory that present future dwelling potential.

To verify the accuracy of the draft BLI map, staff conducted site visits to numerous areas throughout the City that had experienced significant development since 2011. The 'ground truthing', and examination of an aerial photograph taken in April of 2018, allowed for refinement of the BLI to appropriately represent the consumption of property within the City.

Buildable Land

Due to the careful reassessment of each individual parcel within the Urban Growth Boundary and City Limits, and the use of improved GIS spatial analysis tools, severe constraint areas not suitable for development were more readily identified and therefore this BLI provides a more accurate assessment of developable property than did the 2011 BLI. The difference between Gross Acreage, and Net Buildable Acres in the tables below represents reductions in available land area due to severe physical constraints, developed portions of properties, and other constraints to development.

In total, there are approximately 733 net buildable acres of land within the UGB that are developable (across all Comprehensive Plan designations). When considering properties within the city limits alone there are 368 net buildable acres that are classified as developable across all zones.

Table 2 - Total Net Buildable acreage (V&PV) City Limits

BLI_STATUS	# of Parcels	Gross Acreage	Net Buildable Acres
Vacant	330	275.6	164.4
Partially Vacant	327	249.1	149.1
Vacant/Airport	9	94.2	54.5
Vacant/UnDevelopable	95	237.8	0.00 (not buildable)
Vacant /Open Space or Park	371	570.2	0.00 (not buildable)
Vacant /Parking	73	19.7	0.00 (not buildable)

Table 3 - Total Net Buildable acreage (V&PV) UGB alone

BLI_STATUS	# of Parcels	Gross Acreage	Net Buildable Acres
Vacant	56	170.6	118.5
Partially Vacant	112	351.4	230.7
Vacant/Airport	1	21	Per Airport Plan
Vacant/UnDevelopable	8	6.9	0.00 (not buildable)
Vacant /Open Space or Park	2	8.3	0.00 (not buildable)
Vacant /Parking	4	4.5	0.00 (not buildable)

Table 4 - Total Net Buildable acreage (V&PV) UGB & City Limits combined

BLI_STATUS	# of Parcels	Gross Acreage	Net Buildable Acres
Vacant	386	446.2	282.9
Partially Vacant	439	600.5	379.9
Vacant/Airport	10	1152	Per Airport Plan
Vacant/UnDevelopable	103	244.8	0.00 (not buildable)
Vacant /Open Space or Park	373	568.5	0.00 (not buildable)
Vacant /Parking	77	24.1	0.00 (not buildable)

The following tables show the number of net-buildable acres by Comprehensive Plan Designations for City Limits, UGB alone, and total Ashland Urban area (UGB + City Limits), and net-buildable acres by Zoning designation for properties within the City Limits.

Table 5 - Total Net Buildable acreage By Comprehensive Plan (V&PV) City Limits

Comprehensive Plan	# of Parcels	Net Buildable Acres
Commercial	23	12.3
Croman Mill	13	43.8
Downtown	8	0.4
Employment	60	50.7
HC	3	1.2
HDR	58	11.7
Industrial	3	5.4
LDR	57	18.8
MFR	114	22.1
NM	13	16.3
SFR	289	119.9
SFRR	3	2.5
SOU	3	1.8
Suburban R	1	0.1
Woodland	9	6.6
Totals	666	368.0

Table 6 - Total Net Buildable acreage By Comprehensive Plan (V&PV) UGB alone

Comprehensive Plan	# of Parcels	Net Buildable Acres
Airport	1	Per Airport Master Plan
Commercial	6	4.4
Croman Mill	9	17.3
Employment	28	41.7
Industrial	3	9.2
MFR	5	20.1
Normal NBHD	29	69.7
NM	1	0.1
SFR	37	85.2
SFRR	45	94.1
Suburban R	5	7.5
Totals	169	365.1

**Table 7 - Total Net Buildable acreage by Comprehensive Plan (V&PV)
UGB & City Limits combined**

Comprehensive Plan	# of Parcels	Net Buildable Acres	Gross Acres
Airport	10	Per Airport Master Plan	115.2
Commercial	29	16.7	26.8
Croman Mill	22	61.1	85.7
Downtown	8	0.4	2.9
Employment	88	92.4	141.6
HC	3	1.2	1.8
HDR	58	11.7	14.7
Industrial	6	14.6	16.3
LDR	57	18.8	63.5
MFR	119	42.2	64.8
Normal Neighborhood	29	69.7	87.9
NM	14	16.4	31.7
SFR	326	205.1	322.4
SFRR	48	96.7	154.2
SOU	3	1.8	2.3
Suburban R	6	7.5	8.0
Woodland	9	6.6	22.3
Totals	835	733.1	1,161.9

Table 8 - Total Net Buildable acreage By City Zone (V&PV) City Limits

ZONE	# of Parcels	Net Buildable Acres
C-1	24	12.5
C-1-D	8	0.4
CM	12	43
E-1	57	50.4
HC	3	1.2
M-1	4	6.3
NM	12	16
R-1-10	60	20.0
R-1-3.5	1	0.1
R-1-5	89	60.5
R-1-7.5	135	40.2
R-2	115	22.5
R-3	58	11.7
RR-.5	53	15.1
RR-1	3	2.5
SO	7	0.1
WR	5	2.0
Totals		313.5

Dwelling Unit Assessment

The number of potential dwelling units as shown in Table 9 indicates that an approximate total of 1,563 new dwelling units could be accommodated upon lands within the existing City Limits using current zoning and density assumptions. This accounts for a 275 dwelling unit capacity reduction from what was estimated in the 2011 BLI. The number of potential dwelling units that can be accommodated in the entire UGB is 2,847 (see Table 10).

Table 9 - Potential Dwelling Units by Zoning Designation, City Limits

Zone	Permitted Density units per acre	Calculated Dwelling Units (Gross acres x Density)	Adjusted Dwelling Units
C-1	30	597	199
C-1-D	60	172	48
CM	Master Plan	237	83
E-1	15	977	248
HC	13.5	24	16
M-1	na	0	
NM	Master Plan	173	73
R-1-10	2.4	89	69
R-1-3.5	7.2	1	1
R-1-5	4.5	390	268
R-1-7.5	3.6	251	164
R-2	13.5	437	180
R-3	20	294	132
RR-.5	1.2	54	54
RR-1	1	3	3
SO	Master Plan	na	Master Plan
WR	Slope contingent	na	10
Total			1563

The estimated number of dwelling units assumes that upon remaining buildable lands within the City's commercially zoned properties, with mixed-use potential², that such commercial properties will provide only 50% of the residential units that are otherwise permitted at the base densities. This 50% reduction was done at the Calculated Dwelling Unit stage of the analysis, and then further adjusted based on site constraints and existing development to estimate the number of Adjusted Dwelling Units.

Ashland has experienced a history of mixed-use development on commercial lands given the strong market for housing. However, to provide conservative estimates of future housing on commercial lands the 50% reduction from permitted densities is intended to recognize that a number of commercial developments may not elect to incorporate housing into their developments as housing is not a requirement within the zones. Efforts taken by the City to promote inclusion of mixed-use developments within commercially zoned lands along transit routes can function to accommodate more housing on such lands than is presently projected in this BLI.

**Table 10 - Potential Dwelling Units by Comprehensive Plan Designation
UGB & City Limits combined**

Comprehensive Plan	Calculated Dwelling Units	Adjusted Dwelling Units
Airport	0	0
Commercial	803	245
Croman Mill	237	243
Downtown	172	48
Employment	2127	256
HC	24	16
HDR	294	132
Industrial	0	0
LDR	64	65
MFR	874	352
NM	177	73
Normal NBHD	607	474
SFR	1308	744
SFRR	363	145
SOU	2	0
Suburban R	57	44
Woodland	7	10
Total		2847

² E-1 with a residential overlay, C-1, and C-1-D

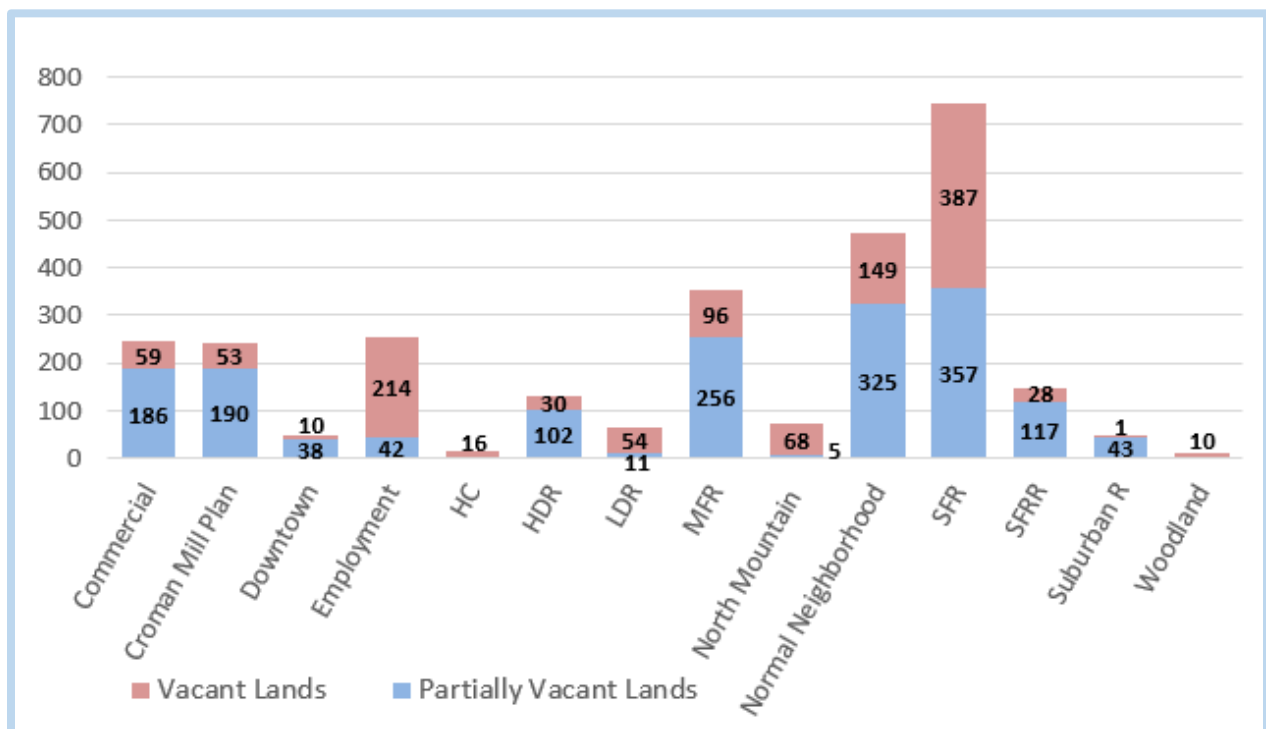


Figure 1. Dwelling Unit Capacity by Comprehensive Plan Designation (number of potential units)

Modification to base zoning densities, density bonuses, zoning or overlay changes, area master plans, or comprehensive plan changes intended to concentrate development within the UGB, could further extend the supply of buildable lands by effectively accommodating more dwelling units upon less land area. To more accurately project the number and type of needed housing the City’s Housing Needs Analysis (HNA) should be referenced. By carefully examining income, age demographics, household sizes, and local housing costs, the HNA helps quantify the expected proportions of rental to ownership, household sizes and needed housing types.

City Property- Public Use

Properties under public ownership are regarded as unlikely to be developed for additional residential uses because they are dedicated for public purposes such as public rights-of-way, parks, power substations, public works yards, or other public facilities. These city owned lands are therefore excluded from the inventory of vacant and partially vacant lands. In the event the City determined a property was not needed for public uses, the City could proceed with disposition of the property through procedures set forth in Oregon Revised Statutes (ORS 270.100-140). At such time the property was no longer restricted for public use, it would then be added to the inventory of buildable lands provided it had further development potential.

Municipalities in Oregon are currently authorized to provide transitional housing on public lands in the form of campgrounds within their urban growth boundaries for persons who lack permanent housing but for whom there is no available low-income alternative, or for persons who lack safe accommodations. [House Bill 2916](#) enacted in 2019 expands the allowance for transitional housing campgrounds with the expressed intent that such housing is temporary and may include yurts, huts, tents, and other similar structures. Such temporary housing units on public property would not be considered permanent dwellings, and as such the potential for such campgrounds does not increase dwelling unit capacity of inventoried buildable lands.

Section 2: Demographics

Population Characteristics

The City of Ashland is being affected by population and demographic trends that will have significant impacts on the housing needs of the future. Of most significance is the slowdown in population growth and changes in the age distribution of residents, including fewer children and higher numbers of seniors.

The age distribution of a city is an important factor in determining current and future housing needs. An aging population generally signals the need for more senior housing, while growing numbers of children and young families would point to the need for more large family housing. According to the 2017 US Census American Community Survey 5-year estimate, less than one-fifth (18.6%) of the City of Ashland's population were children, aged 19 years old or less. Young adults (aged 20 to 35), generally the age when people form independent households, made up approximately another fifth of the population (21.9%). Thirty-seven percent of the City's population is aged 35 to 64 years old. This leaves about 22% of the population that is currently aged 65 years and older. Based on 2013-2017 American Community Survey 5-year estimates 20.2% of Jackson County residents were aged 65 and over, whereas in Oregon only 15.9% of the population is within this age cohort.

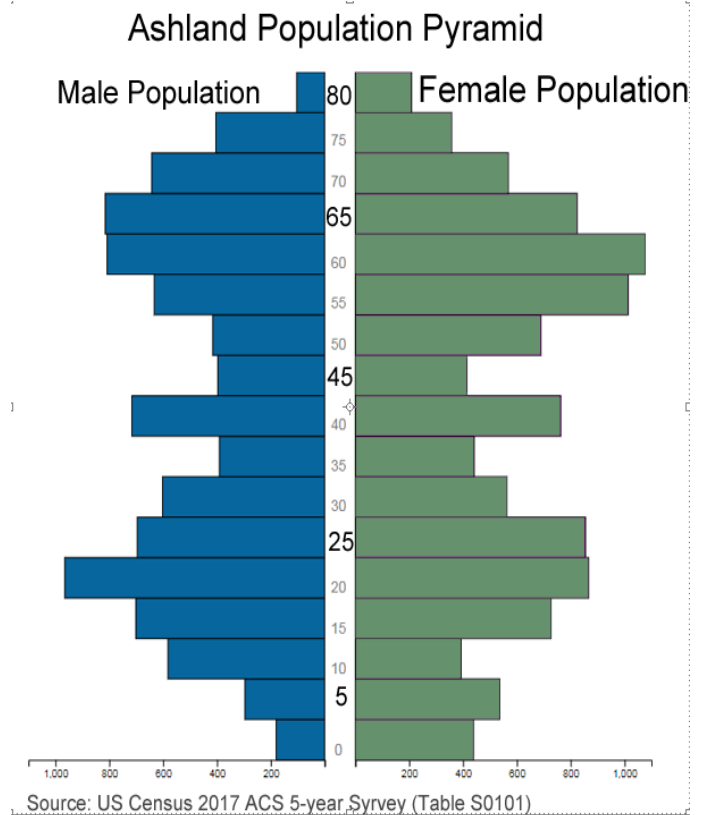


Figure 2. Ashland Population Pyramid

This trend toward an aging population, is likely to continue into the foreseeable future. According to the State of Oregon's Office of Economic Analysis, rapid growth in elderly age cohorts is expected statewide. Specifically, within the Rogue Valley the large cohort of baby-boomers are increasingly moving into the traditional 65 and older retirement age group. Immigration from older age groups also bolstered the local population of the 65 and older crowd. In 2000, there were 29,140 residents age 65+ in Jackson County. By 2017, this group reached 47,347, or an increase of 62.5 percent. Ashland has experienced a significant aging of our population over the last two decades in comparing the age cohorts as illustrated in Figure 5. A large senior and student population within Ashland understandably increases the number of small one and two person households given these populations typically do not have children present in

their homes.

As illustrated in Figure below, Ashland's collective population has been growing older since 2010, a trend that was evident between 2000 and 2010 as well. The shifting age cohort line shows a significant increase in Ashland's residents that are 65 years or older as a percentage of the total population. The other age cohort that shows an increase as a percentage of the population is people between 25 and 34 years old.

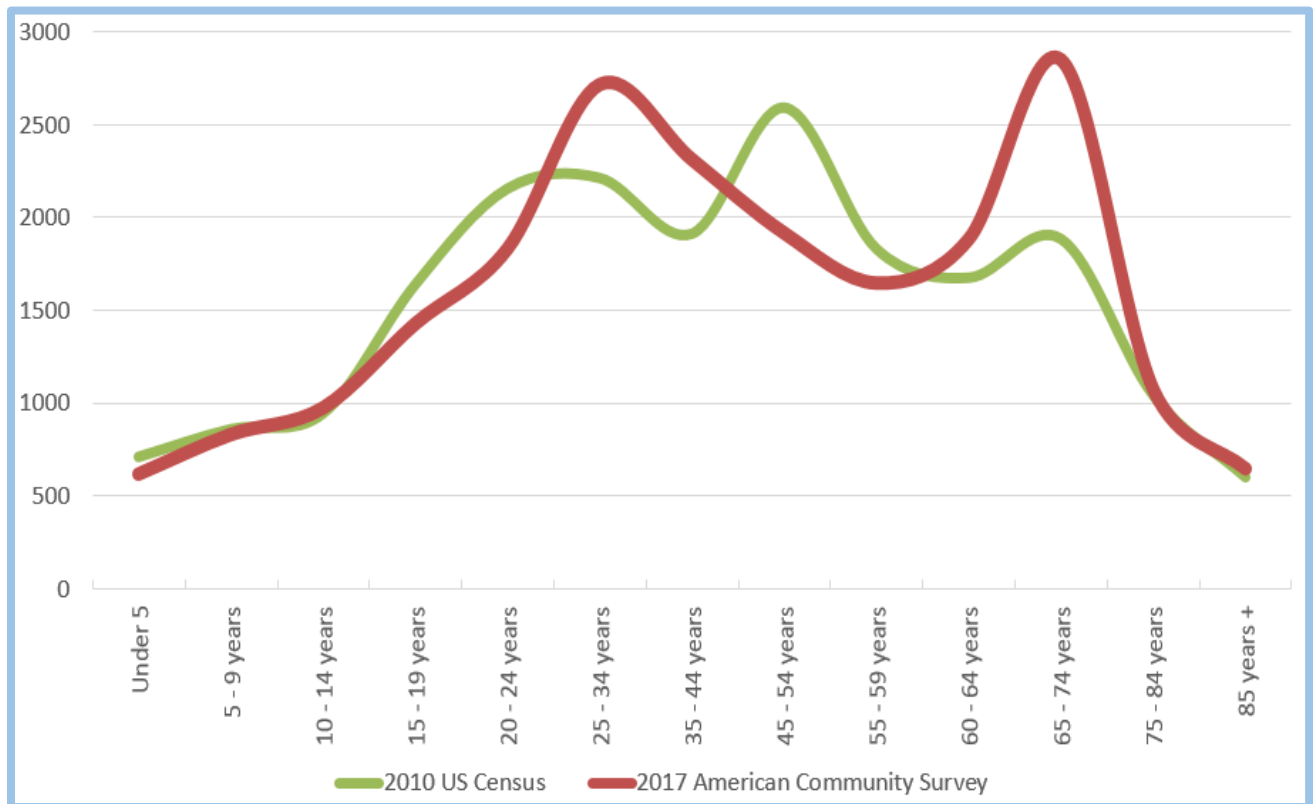


Figure 3. Ashland Age Cohorts 2010-2017

Population Growth

The primary indicator of future residential land needs is the projected population growth. In combination with changes in the number of people per household, and the assumed vacancy rates for housing units, these factors can predict the number of total housing units needed. The population of the City of Ashland historically has been measured using census population counts and the percentage of Ashland's population in proportion to the County's population. The Population Element of the Comprehensive plan, using those measures, as well as birth rates, death rates and migration rates, projected that Ashland's population will grow at rate of 0.75% annually. In 2015, per the direction of the Oregon Legislature, all cities began utilizing population counts and estimates based on the Portland State University (PSU) Population Research Center's Coordinated Population Forecast. These forecasts estimate that the City of Ashland's population will grow at rate lower than that of the prior estimate within the Comprehensive Plan. The PSU report notes an annual average growth rate of .4% from 2018-

2043, and a rate of just 0.1% from 2043-2068.

Table 11 - Population Growth Projections

Region	2018	2043	2068	Total change	AAGR 2010-2018	AAGR 2018-2043	AAGR 2043-2068
Jackson County	219,270	272,226	320,852	101,582	0.9%	0.9%	0.3%
Ashland	21,501	23,625	24,177	23,196	0.5%	0.4%	0.1%

Sources: PSU Coordinated Population Forecast 2018 through 2068.

According to the PSU projections, Ashland's population within the UGB will increase from 21,501 in 2018 to 23,160 in 2030, after which the rate of increase will decline as shown in the chart below.

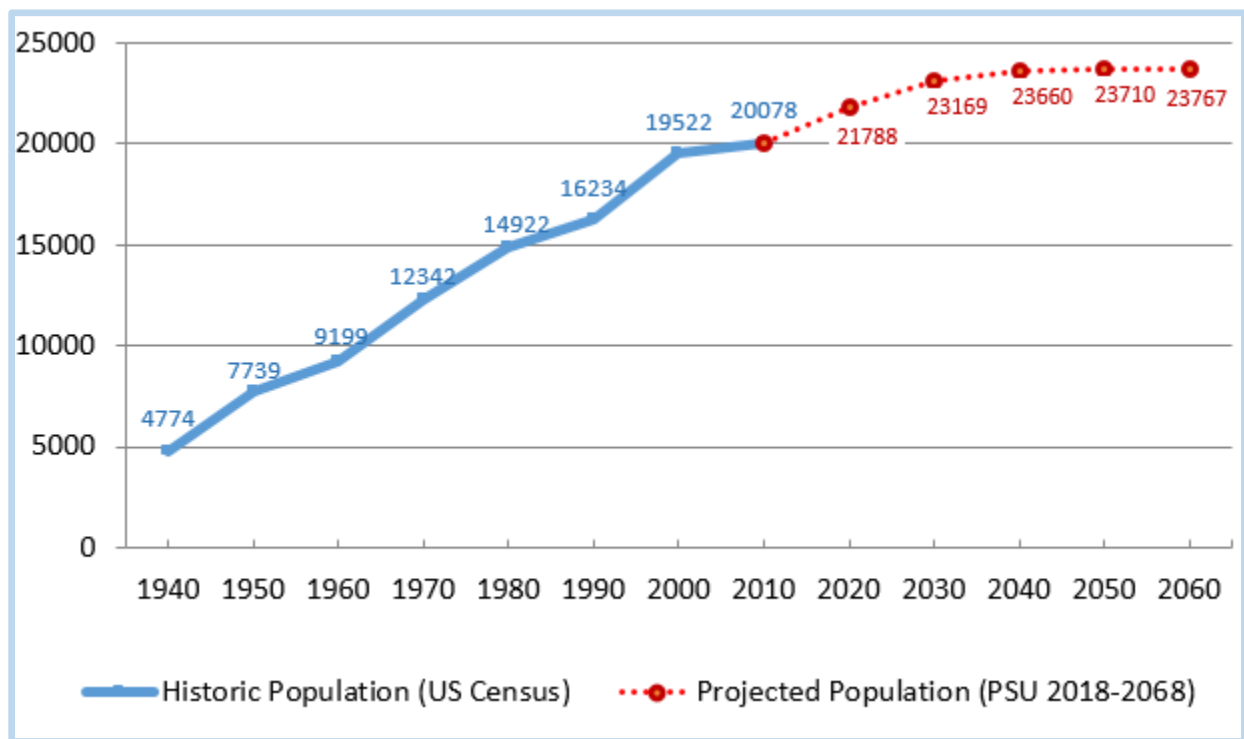


Figure 4. Ashland Historic and Projected Population 1940-2068

Sources: US Decennial Census and PSU Coordinated Population Forecast 2018 through 2068

In accordance with [House Bill 2254](#) (approved by the Oregon Legislature in 2019) which streamlined the UGB process based on long-term housing and employment needs, a 14-year population forecast (2018-2032) was provided in the PSU Coordinated Population Forecast which projects an Annual Average Growth Rate of 0.6% for the City of Ashland between 2018 and 2032.

Persons Per Household

The average household size in Ashland has declined steadily over the last five decades, dropping from 2.84 persons per household in 1970, to 2.36 in 1980, and to 2.03 persons per household by 2010 according to the US Census. PSU's Coordinated Population Forecast (2018-2068) expects persons per household (PPH) to decline further in Ashland to 2.0 PPH as "smaller household size is associated with an aging population in Jackson County and its sub-areas".

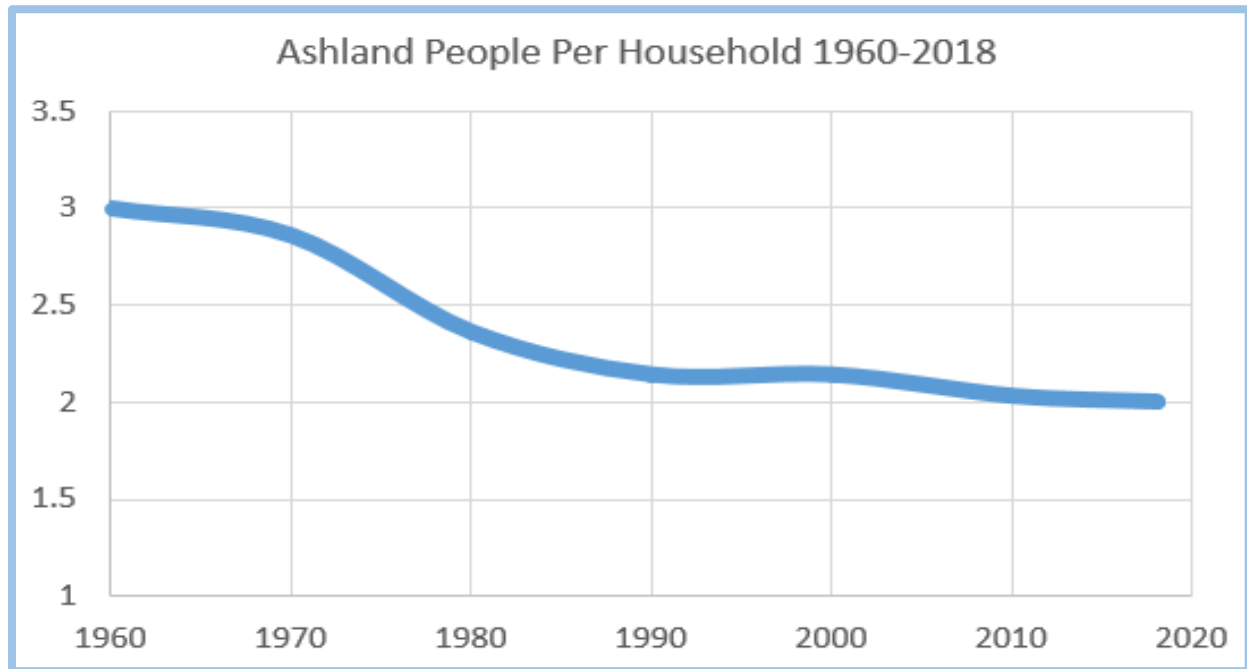


Figure 4. Ashland People per Household 1960-2018.

Jackson County has a PPH of 2.4, which in comparison to Ashland's PPH of 2.0, illustrates that Ashland has smaller household sizes than the region as a whole. One and two person households represent the largest segments of Ashland's housing market. Combined, these small households comprise nearly 79% of owner households and 74% of renter households in Ashland. As such less than a quarter of all households within Ashland have 3 or more occupants.

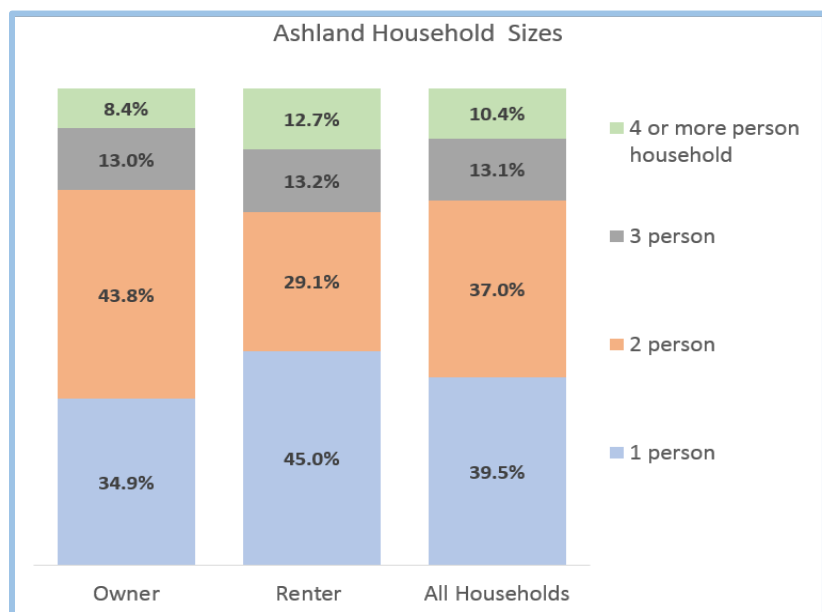


Figure 5. Ashland Household sizes

Sources: Census Bureau. 2013-2017 American Community Survey 5-Year Estimates

Single Family Home Sizes

As the number of “persons per household” has decreased over time, the average square footage of floor area has increased. The traditional single family detached housing development is mismatched with the increasing number of smaller households, resulting in an increase in the consumption of total acreage relative to the number of people housed. A wider menu of housing designs options, and layouts including cottage housing units, duplexes, and multifamily rental housing, enable people to find housing better suited to their household needs, and would result in accommodating more people per acre, thereby assisting in providing an offset to the decrease in individual household sizes.

Further the depletion of available land, increasing land prices, and more square feet of housing per occupant collectively function to increase overall housing costs. According to the National Association of Home Builders the average size of new single-family homes increased post-recession. Although average house sizes fall prior to and during a recession as home buyers tighten budgets, the square footage increases as higher end home buyers return to the market after the recession ends. This pattern is evident in Ashland in Figure 6 below which shows a declining house sizes from 2008-2011, with an increasing average size following the low of 1,788sq.ft. in 2011.

However, in evaluating the median home size by calendar year it is evident the variation in average home size is impacted by a few large homes relative to the total number of homes built each year. In the calendar year 2018, the average home size was 2,163 sq feet, whereas half the homes built were less than 1,738 sq.ft. in size. 2018 has the lowest recorded median home size during the 2001-2018 period. The increasing development of smaller homes accounts for this shift

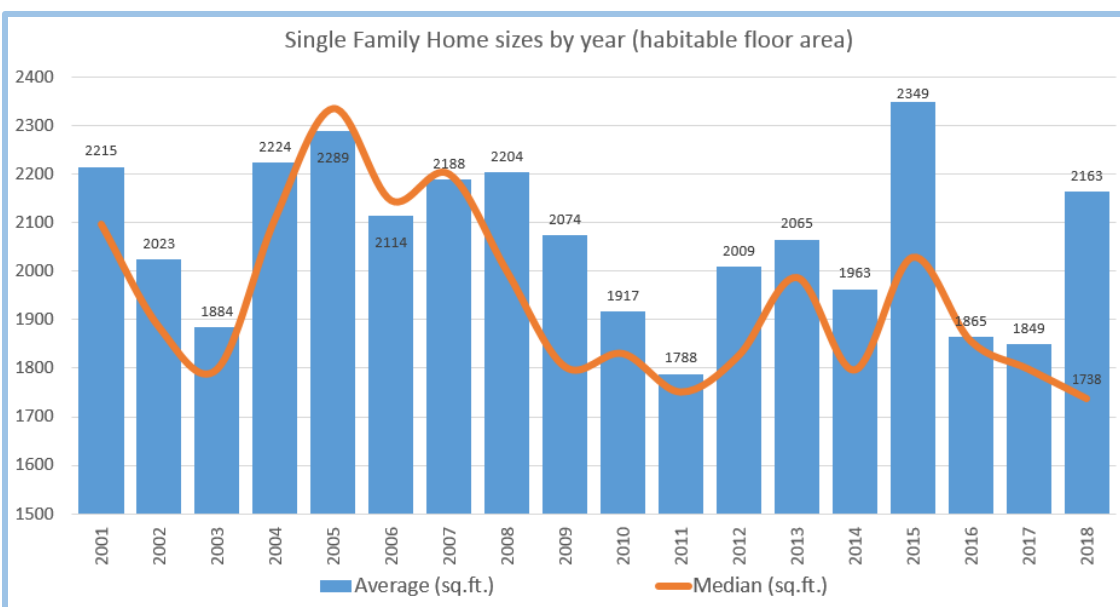


Figure 6 – Ashland Home Sizes by year

This same pattern of increasing house sizes is occurring nationally according to first quarter 2019 data from the National Association of Home Builders which shows that median single-family square floor area ticked up from 208 levels to 2,355 square feet. Average (mean) square footage for new single-family homes increased to 2,584 square feet.

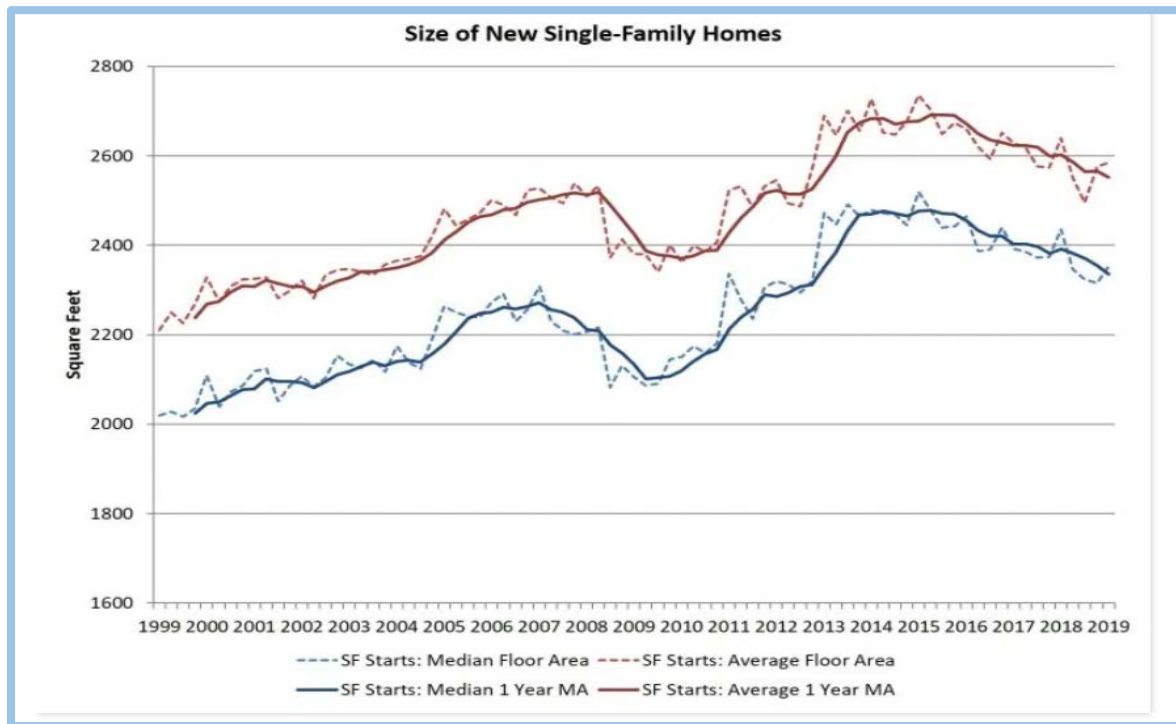


Figure 7 - Average Home Size (National)

Sources: National Association of Home Builders (<http://eyeonhousing.org/2019/05/new-single-family-home-size-first-quarter-2019-data/>)

The current decline in home size can be attributed to various factors including the desire to keep energy costs down, reductions in equity in existing homes available to be rolled over into new ones, tighter credit standards, less interest in buying a home as an investment and a growing presence of first-time buyers seeking smaller units. The chairman of the National Association of Home Builders expects this downward trend to continue, "A new housing market is emerging, and even with the recession in the rear view mirror we expect the popularity of smaller homes to persist," said Bob Jones, "Builders are responding to a new mindset among home buyers that has been shaped not just by a weak economy, and it is transforming the product they deliver."

Student Population and Housing

The Master Plan for Southern Oregon University for the period 2010-2020 was predicated on projections of enrollment growth to approximately 6,000 students. The Winter 2019 enrollment report from SOU indicates a total student count of 5970. Of these students 29.6% (1,770) were non-residents and 70.4 % (4,200) were residents. Students that were classified as residents include both those housed on-campus and those living elsewhere in Ashland. The University's master plan indicates will utilize its available land to provide new housing and anticipates approximately 25% of all students can be housed on campus.

According to the 2010-2020 SOU Master Plan:

The University will pursue construction of new housing to current standards to serve three goals:

- *replace older housing structures that are near the end of their useful life;*
- *expand the percentage of students housed on campus in order to increase the number of upper division students who live in campus housing and to help improve student retention;*
- *maintain a compact campus with housing within a 5-minute walk of the campus core.*

New student housing will be constructed on the north campus, but within a walkable distance from the heart of campus. The intent is to create a cluster of housing that will support a more pronounced student life zone on campus, and still contribute to a walkable scale.

SOU completed the development of the 704 bed McLoughlin Hall dormitory complex in 2013. The older 692 bed Cascade Complex was removed from residential use at that time although a portion of this building is currently utilized on an intermittent basis to house some Reserve Officer Training Corps (ROTC) students. As such there has been a minimal gain in the number of students that could be housed on SOU campus since the completion of the last Buildable Lands Inventory and Housing Needs Analysis.

As of 2019 SOU Housing maintains 1094 residence hall (dormitory) beds, 165 apartment units (two of which are presently reserved for faculty) and 9 detached housing units. As of Spring of 2019 SOU was housing 763 students in residence halls and had 146 Student Apartments and Family Housing units occupied by families. In consideration of current occupancy SOU has a remaining capacity to accommodate approximately 331 students in dormitories, and 28 households in SOU apartments and family housing. Lastly, the SOU Plan identifies alternative locations for the future creation of a Faculty Village to provide housing opportunities (12-48 potential units) for professors and staff.

Section 3: Housing Needs Analysis

The City completed a [Housing Needs Analysis in 2012](#). A Housing Needs Analysis allows a community to define the supply and demand characteristics for various types of housing, including sales housing, rental needs housing and special needs housing. With the completion of this 2019 Buildable Lands Inventory the City will be able to undertake an update of the Housing Needs Analysis (HNA) to compare projected housing demand to the existing land availability. In this way an updated HNA provides the necessary information to inform decisions, as well as to identify where refinements to land use designations may be necessary to accommodate needed housing types. Ideally, Ashland will have a mix of housing that supports current and future residents as their housing needs and conditions change. Further, having a balance of housing that is affordable and suitable for various income levels plays a supportive role in economic development.

In completing the 2019 BLI, the City reviewed building permit data to summarize land consumption rates by year as shown for residential lands in Table 11 below.

Table 11- Historic Land Consumption

Residential Land Consumption, Acres by Zone										
Zone	2011	2012	2013	2014	2015	2016	2017	2018	2011-2018 Total	Annual Avg.
NM	1.0	3.5	0.7	0.8	0.9	0.4	0.2	0.3	7.5	0.9
R-1-10	1.0	0.2	1.6	2.4	1.9	2.5	0.4	2.4	12.3	1.5
R-1-3.5		0.4		0.1	0.1	0.8	0.6		2.0	0.2
R-1-5	1.2	1.6	4.0	3.4	1.6	1.3	1.5	3.3	17.9	2.2
R-1-7.5	1.4	1.6	2.3	0.5	2.4	1.7	3.0	1.2	14.1	1.8
R-2	0.5	0.8	0.3	0.7	0.5	1.5	0.3	0.4	5.0	0.6
R-3	0.6	0.1		0.6	0.3	0.1	0.2	1.4	3.4	0.4
RR-.5		1.6	2.4	1.2	3.4	1.1	0.5	3.8	14.0	1.8
RR-5		0.5				0.6			1.1	0.1
WR			4.6		0.5	2.3		2.2	9.6	1.2
Total	5.6	10.2	15.8	9.7	11.5	12.4	6.8	14.9	86.9	10.9

A housing needs projection exclusively based on projecting past development trends would function to perpetuate any unmet housing needs into the future. For this reason, and in the face of a changing housing market, determining the yearly consumption average and simply multiplying that by 20 to determine a twenty-year demand for various housing types would not adequately estimate future housing need. Further changes in the community demographics, including number of “people per household” will have a substantial impact upon the needed land area independent of past consumption rates. The relationship between lot size and square feet of living space is also key in determining how efficiently land will be consumed by future

development. In combination an up to date Buildable Lands Inventory and a Housing Needs Assessment can be useful tools in evaluating the appropriate distribution of units by housing type while factoring in income and age information. With this information policy decisions necessary to adequately plan for the housing needs of current and future populations are possible.

The State of Oregon City passed legislation in 2019 (HB 2003) which directs the Department of Land Conservation and Development (DLCD) is to adopt a statewide schedule for to develop specific guidance on how cities should perform a Housing Needs Analysis and in developing a Housing Production Strategy. In the coming year DLCD will develop a methodology and model for to assist communities in quantify the projected housing needs in consideration of changing market conditions and the demographic profile of each City. Once the state implements the provisions of HB2003, Ashland will be required to complete an HNA every 8 years. It is the City's expectation that a new HNA for Ashland will be developed soon after the State approved methodologies are established. The data contained within this 2019 BLI will be valuable in quantifying available land supply and existing housing capacity to complete that projection of future housing needs.

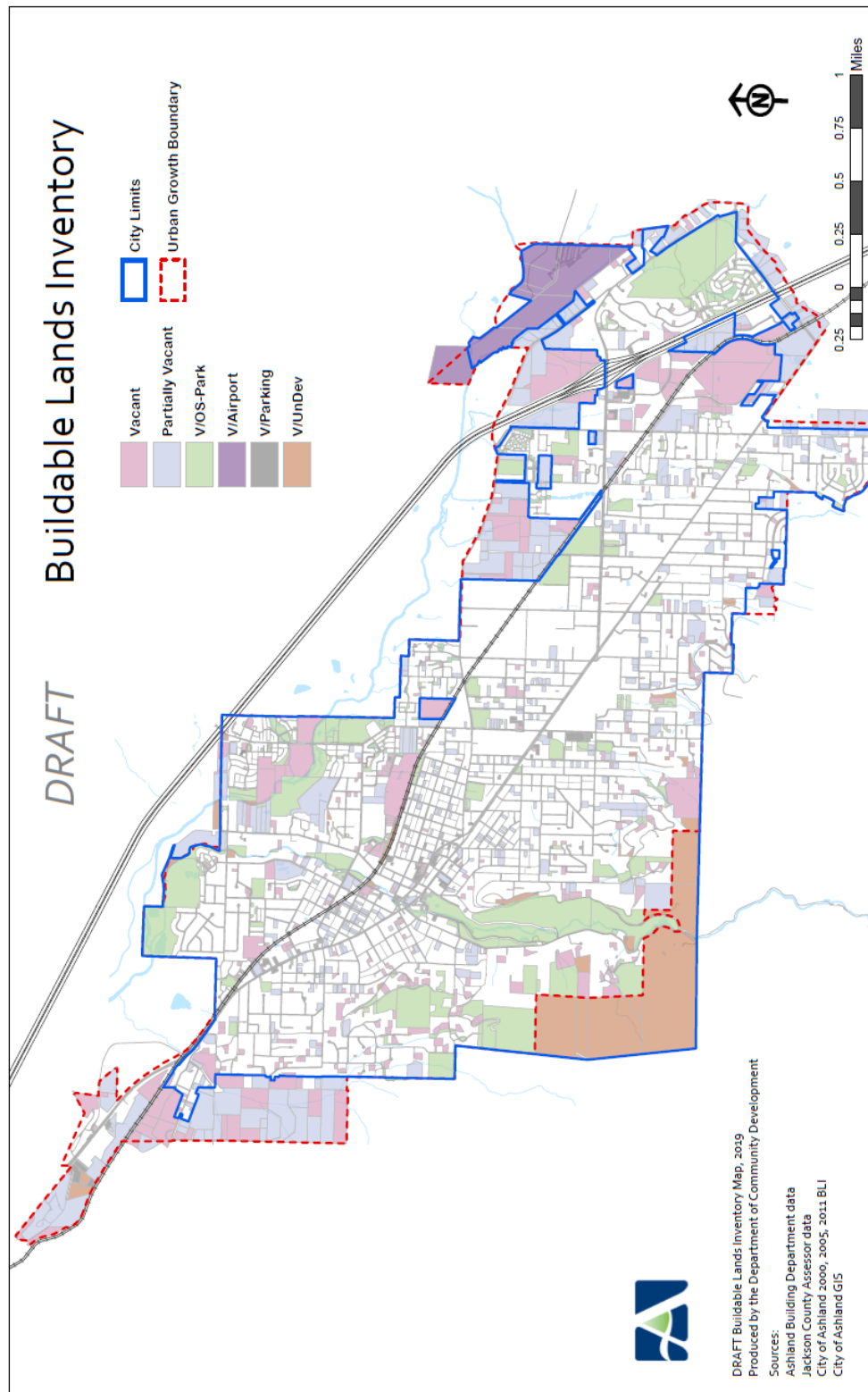
Appendix A – Vacant Properties– In process of development

Lands Categorized as “Vacant/In-process”. These properties had received Planning Action approval but had not yet received building permits at as of July1, 2019. As such these projects are expected to be developed in the near future and will further reduce available lands.

Map & Tax Lot	Zone	Address	Acres	Units	Status Planning Approval = PA Building Permit = BP
04CB 8800	R-1-5	Mountain View / Laurel (12 cottages)	.75	12	BP issued after 7/1/2019
04BC 143	R-1-5	702 N Laurel	0.14	1	BP issued after 7/1/2019
10BB 600	R-1-5	520 Fordyce St.	0.14	1	BP issued after 7/1/2019
05AD 200	R-1-5	Otis Street	5.92	27 lots	PA approval only – no building permits
04CA 1900	R-1-5	657 Oak Street	0.39	3	PA approval only – no building permits
23BA 319	R-1-7.5	2326 Blue Sky Ln	0.42	1	BP issued after 7/1/2019
23BA 323	R-1-7.5	2321 Blue Sky Ln	0.59	1	BP issued after 7/1/2019
09BC 7805	R-1-7.5	126 Fork St.	0.31	1	BP issued after 7/1/2019
11C 2504/2505	R-2	380 Clay Street (HAJC)	3.35	60	PA approval only – no building permits
10CB 2100/2102	R-3	Garfield St.	2.1	70	PA approval only – no building permits
09SF 2000	R-3	1010/1014/990 Eureka St	0.19	3	BP issued after 7/1/2019
10DC 9201	C-1	1675 Ashland St. (Columbia Care)	1.09	30	PA approval only – no building permits
09BA 10102/10103	C-1	Lithia Way (First Place - OSF)	0.33	34	BP issued after 7/1/2019
04CD 1803	E-1	121 Clear Creek	0.56	8	BP issued after 7/1/2019 for one building; PA approval for 4 additional buildings

Appendix B – 2019 Buildable Lands Inventory Map

To be published online at www.ashland.or.us/BLI once approved.



Appendix C – Oregon Administrative Rules

(Source: Oregon Administrative Rules, 1998 Compilation, LCDC)

- (1) A "Net Buildable Acre" consists of 43,560 square feet of residentially designated buildable land, after excluding present and future rights-of-way, restricted hazard areas, public open spaces and restricted resource protection areas.
- (2) "Attached Single Family Housing" means common-wall dwellings or rowhouses where each dwelling unit occupies a separate lot.
- (3) "Buildable Land" means residentially designated vacant and, at the option of the local jurisdiction, redevelopable land within the urban growth boundary that is not severely constrained by natural hazards (Statewide Planning Goal 7) or subject to natural resource protection measures (Statewide Planning Goals 5 and 15). Publicly owned land is generally not considered available for residential use. Land with slopes of 25 percent or greater unless otherwise provided for at the time of acknowledgment, and land within the 100-year flood plain is generally considered unbuildable for purposes of density calculations.
- (4) "Detached Single Family Housing" means a housing unit that is free standing and separate from other housing units.
- (5) "Government Assisted Housing" means housing that is financed in whole or part by either a federal or state housing agency or a local housing authority as defined in ORS 456.005 to 456.720, or housing that is occupied by a tenant or tenants who benefit from rent supplements or housing vouchers provided by either a federal or state housing agency or a local housing authority.
- (6) "Housing Needs Projection" refers to a local determination, justified in the plan, as to the housing types and densities that will be:
 - (a) Commensurate with the financial capabilities of present and future area residents of all income levels during the planning period;
 - (b) Consistent with OAR 660-007-0010 through 660-007-0037 and any other adopted regional housing standards; and
 - (c) Consistent with Goal 14 requirements for the efficient provision of public facilities and services, and efficiency of land use.
- (7) "Manufactured Dwelling" means:
 - (a) Residential trailer, a structure constructed for movement on the public highways that has sleeping, cooking and plumbing facilities, that is intended for human occupancy, that is being used for residential purposes and that was constructed before January 1, 1962;
 - (b) Mobile home, a structure constructed for movement on the public highways that has sleeping, cooking and plumbing facilities, that is intended for human occupancy, that is being used for residential purposes and that was constructed between January 1, 1962, and June 15, 1976, and met the construction requirements of Oregon mobile home law in effect at the time of construction;
 - (c) Manufactured home, a structure constructed for movement on the public highways that has sleeping, cooking and plumbing facilities, that is intended for human occupancy, that is being used for residential purposes and that was constructed in accordance with federal manufactured housing construction and safety standards regulations in effect at the time of construction;
 - (d) Does not mean any building or structure subject to the structural specialty code adopted pursuant to ORS 455.100 to 455.450 or any unit identified as a recreational vehicle by the manufacturer.
- (8) "Manufactured Dwelling Park" means any place where four or more manufactured dwellings as defined in ORS 446.003 are located within 500 feet of one another on a lot, tract or parcel of land under the same ownership, the primary purpose of which is to rent space or keep space for rent to any person for a charge or fee paid or to be paid for the rental or use of facilities or to offer space free in connection with securing the trade or patronage of such person. "Manufactured dwelling park" does not include a lot or lots located within a subdivision being rented or leased for occupancy by no more than one manufactured dwelling per lot if the subdivision was approved by the local government unit having jurisdiction under an ordinance adopted pursuant to ORS 92.010 to 92.190.

(9) "Manufactured Homes" means structures with a Department of Housing and Urban Development (HUD) label certifying that the structure is constructed in accordance with National Manufactured Housing Construction and Safety Standards Act of 1974 (42 U. S. C. Sections 5401 et seq.), as amended on August 22, 1981.

(10) "Mobile Home Park" means any place where four or more manufactured dwellings as defined in ORS 446.003 are located within 500 feet of one another on a lot, tract or parcel of land under the same ownership, the primary purpose of which is to rent space or keep space for rent to any person for a charge or fee paid or to be paid for the rental or use of facilities or to offer space free in connection with securing the trade or patronage of such person. "Mobile home park" does not include a lot or lots located within a subdivision being rented or leased for occupancy by no more than one manufactured dwelling per lot if the subdivision was approved by the local government unit having jurisdiction under an ordinance adopted pursuant to ORS 92.010 to 92.190.

(11) "Multiple Family Housing" means attached housing where each dwelling unit is not located on a separate lot.

(12) "Needed Housing" defined. Until the beginning of the first periodic review of a local government's acknowledged comprehensive plan, "needed housing" means housing types determined to meet the need shown for housing within an urban growth boundary at particular price ranges and rent levels. On and after the beginning of the first periodic review of a local government's acknowledged comprehensive plan, "needed housing" also means:

- (a) Housing that includes, but is not limited to, attached and detached single-family housing and multiple family housing for both owner and renter occupancy;
- (b) Government assisted housing;
- (c) Mobile home or manufactured dwelling parks as provided in ORS 197.475 to 197.490;
- (d) Manufactured home on individual lots planned and zoned for single-family residential use that are in addition to lots within designated manufactured dwelling subdivisions.

(13) "Redevelopable Land" means land zoned for residential use on which development has already occurred but on which, due to present or expected market forces, there exists the likelihood that existing development will be converted to more intensive residential uses during the planning period.

Oregon Administrative Rules; Excerpts Pertaining to Buildable Land Inventories

- [660-024-0050 Land Inventory and Response to Deficiency](#)
- [660-008-0010 Allocation of Buildable Land](#)