St Helens HNA Project Schedule

Project Task		Mtgs	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Task 1:	**Project Kick-off**			11/9							
1.1	Public Involvement Plan										
1.2	Revised schedule										
1.3	Kick-off meeting Teleconference	1	10/16								
1.4	Tasks/Action Items Summary										
Task 2:	**Housing Needs Projection**										
2.1	Draft Housing Needs Projection Memo										
2.2	Advisory Committee meeting materials										
2.3	Advisory Committee meeting #1	1			12/11						
Task 3:	**Buildable Lands Inventory**										
3.1	Draft BLI Methodology Memo										
3.2	Advisory Committee meeting materials										
3.3	Advisory Committee meeting #2	1					2/12				
Task 4:	**Residential Land Need Analysis**										
4.1	Draft Housing Land Needs Analysis										
Task 5:	**Measures to Accommodate Need**										6/15
5.1	Housing Policy Options Memo										
5.2	Draft Housing Needs Analysis (HNA)										
5.3	Presentation materials										
5.4	Advisory Committee meeting #3	1						3/12			
5.5	Council/Public worksession #1	1							tbd		
5.6	HNA Adoption Materials										

Existing Housing Mix, City of St Helens

5,100 total housing units in City as of 2016

- 67% Single Family
- 17% Townhomes & Plexes
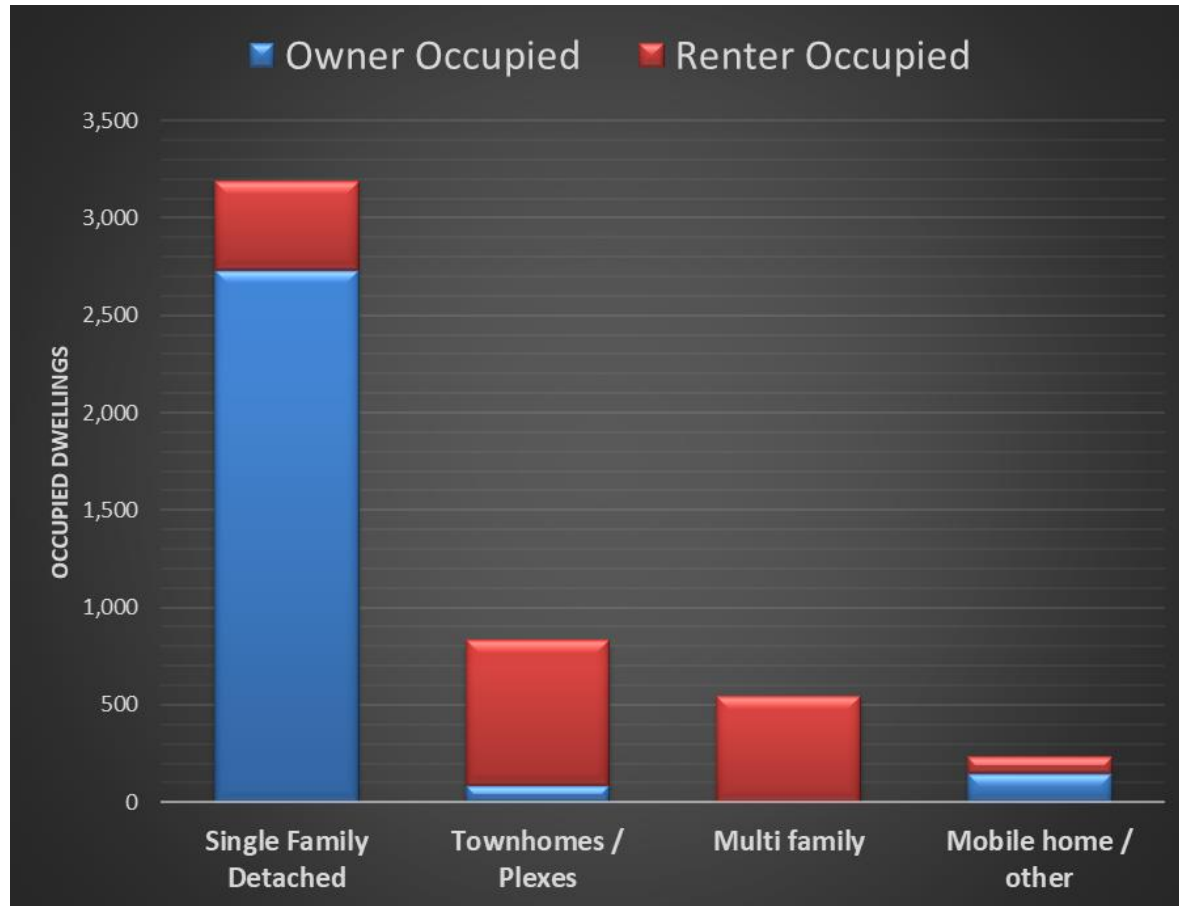- 11% Multifamily
- 5% Mobile Home/Other

Legend:
- Single Family Detached
- Townhomes / Plexes
- Multi family (5+ units)
- Mobile home / other
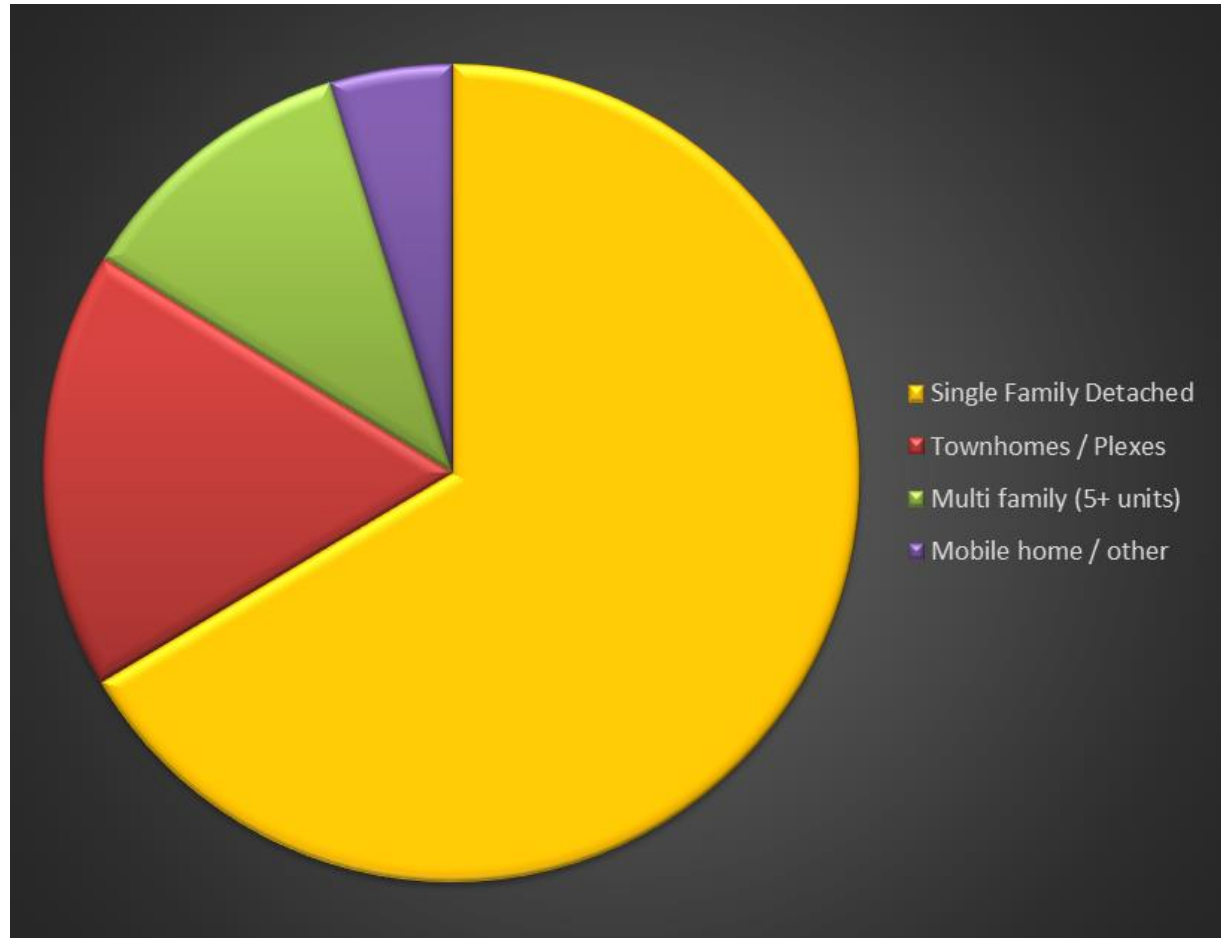
Source: U.S. Census American Community Survey 2012-2016, FCS GROUP.

Existing Housing Tenancy, City of St Helens

Occupied
Housing:
62% owner
38% renter

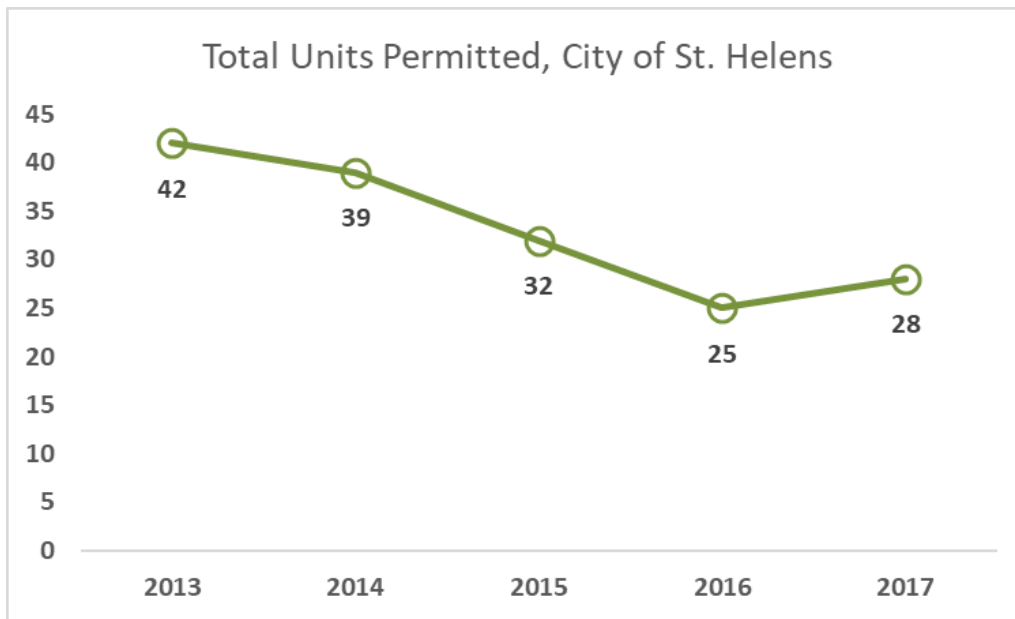*Source: U.S. Census American Community Survey 2012-2016. FCS GROUP.*

Housing Market Trends

- **Home values are relatively affordable in St. Helens compared with neighboring jurisdictions**
- **Sales prices grew rapidly last year**

	Nov-17	Nov-18	Change %
St. Helens	$242,000	$264,000	9.1%
Clatskanie	$211,000	$227,000	7.6%
Forest Grove	$319,000	$337,000	5.6%
Rainier	$278,000	$297,000	6.8%
Scappoose	$300,000	$325,000	8.3%

Source: Zillow.com; analysis by FCS 11/09/18.

Total Units Permitted, City of St. Helens

Year	Units
2013	42
2014	39
2015	32
2016	25
2017	28

- **Housing construction permitting relatively stable**
- **Slight downward trend over the last five years**
- **80% of permitted units are single family detached dwellings**

Demographics and Socioeconomics

- **Population is growing along with Columbia County and Oregon**

- **Incomes are below Columbia County**

- **Educational attainment is like Columbia County**

- **Poverty rate is higher than Columbia County**

	St. Helens	Columbia County
Population	13,169	49,645
Median household income (dollars)	$45,727	$55,146
Median Family Income	$56,699	$67,287
Population 25 and older by education (highest degree)		
Less than high school	11%	10%
High school graduate	35%	33%
Some college or associate's degree	39%	39%
Bachelor's degree or higher	15%	19%
Persons in poverty #	2,434	6,598
Poverty population %	19%	13%

Source: 2012-2016 American Community Survey 5-Year Estimates

Baseline Housing Need Forecast

- **Pop. Growth per PSU forecast: 3,617 people added to UGB**

- **Group quarter share, household size and vacancy remains at current levels**

- **Tenancy remains at 60:40** (owner:renter)

- **New housing mix remains about the same:** 66% SFD, 18% SFA, 16% Apts/other

	Owner-Occupied Dwelling Units	Renter-Occupied Dwelling Units	Vacant Units	All Dwelling Units
Housing Tenure Distribution:	**58.2%**	**35.9%**	**5.9%**	**100.0%**
Housing Unit/Type Distribution				
Single Family Detached	92%	25%	67%	66%
Townhomes / Plexes	3%	41%	24%	18%
Multi family (5+ units)	0%	30%	9%	11%
Mfg. home/other	5%	5%	0%	5%
Total	**100%**	**100%**	**100%**	**100%**

Prelim. Housing Need: 20-year Projection

	Projected 20-year Change (Units)
Housing Tenure Distribution:	**1,398**
Housing Unit/Type Distribution	
Single Family Detached	930
Townhomes / Plexes	248
Multi family (5+ units)	157
Mfg. home/other	64
Total	**1,398**

Baseline UGB housing forecast equates to 1,398 net new housing units over 20 years

Assumes 814 owner units and 502 renter units

Other forecast scenarios are possible to reflect local housing policy choices

Housing attainability considerations regarding accessory dwellings, duplexes, townhomes, small lot housing, apartments and manufactured home parks

Next tasks evaluate buildable land supply in relation to residential land need (demand)