



Tuesday, April 26, 2022

50-YEAR STAKEHOLDER ADVISORY COMMITTEE MEETING AGENDA

Meeting at 6:00 pm

This meeting will be held in a hybrid format at Scappoose City Hall via Microsoft Teams

Topic

- | | |
|---|----------------|
| 1. Call to order | 6:00 pm |
| 1.1. Roll call | |
| 1.2. Approval of Agenda; April 26, 2022 | |
| 1.3. Approval of Minutes; March 15, 2022 | |
| 1.4. Public comment | |
| 2. New Business | |
| 2.1. Housing Needs Analysis Overview
CJ Doxsee, MIG APG | 6:15 pm |
| 2.2. Housing Needs Analysis
Brendan Buckley, Johnson Economics | 6:30 pm |
| 2.3. Housing Needs Analysis Discussion | 6:40 pm |
| 2.4. Buildable Land Inventory
CJ Doxsee, MIG APG | 7:00 pm |
| 2.5. Buildable Land Inventory Discussion | 7:30 pm |
| 3. Announcements | 7:55 pm |
| 3.1. Next meetings | |
| • Tuesday May 17, 2022 at 6:00pm | |
| • Tuesday May 31, 2022 at 6:00pm | |
| • Tuesday July 19, 2022 at 6:00pm | |

The Committee will accept written public comment at all meetings. Comments submitted by 5:00pm on April 26, 2022 to City staff will be included in the meeting packet. Please email 50-year-plan@cityofscappoose.org, drop written comments at City Hall, or call 503-543-7146.

This meeting will be conducted in a handicap accessible room. If special accommodations are needed, please contact City Hall at (503) 543-7146, ext. 224 in advance. TTY 1-503-378-5938



SCAPPOOSE

50 YEAR PLAN

3.2. Upcoming events

- Annual Town Meeting, April 30, 2022

3.3. Reminders

- Community conversations
- Online survey

4. Adjournment

8:00 pm

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DATE: April 6, 2022
TO: Scappoose Advisory Committee
CC: Laurie Oliver Joseph
FROM: Beth Goodman
SUBJECT: Scappoose Advisory Committee Meeting #1 Minutes – March 15, 2022

The Scappoose Advisory Committee held its first meeting on March 15, 2022 from 6 to 8 p.m. Attendance for the meeting is listed in the attached roster. This memorandum documents the minutes from the meeting, which was led by the consultant team from ECONorthwest (Beth Goodman) and 3J (Anaïs Mathez).

Meeting recording:

https://youtube.com/playlist?list=PL2_E5A2B34qT4aMjVFhDUr145yRuWDOZj

1. Call to order

The meeting was called to order by Chair Patrick Kessi.

2. Welcome and Introductions

Introductions and discussion of the question *“What do you love about Scappoose?”*

- Brian Rosenthal: Local developer who owns some small commercial properties. I like the town—it has value. It’s a great place to raise kids, not too crowded. Growth is positive, just have to do it right.
- Patricia Turpen: Senior Center. Lived here since 1994. This was the place we could get the kind of housing we have. We love our neighbors.
- Tyler Miller: City Council. I grew up here; it feels like home.
- Patrick Kessi, Chair: Community member at large. Grew up here. Great place to raise kids. Growth we’ve seen has been progress done right. That’s what we want to see going forward.
- Christine Turner: Vice Chair. Lived here since 2004. Business owner and on Scappoose economic development committee. I love the potential of Scappoose.
- Andy: Scappoose Bay Watershed Council. I love the access to the outdoors and nature and parks.
- Debbie Jacob: Senior Planner with Columbia County Development Land Services. This is my favorite City, close to Portland.
- Casey Garrett: County Commissioner. Live in St Helens but most family lives in Scappoose. Access to metro area but having a rural feel with community spirit.
- Janet Williams: Historical Society. Been here 50 years. Raised family here. All amenities of the big city.

- Isaac Butman: City of Scappoose. Recreation amenities, busy but not too busy.
- Craig Campbell: OMIC. Love the people of Scappoose. Everyone is welcoming and supportive.
- Len Waggoner: Scappoose Drainage Improvement Company. Been coming here for 80 years.
- Nancy Ward: Port of Columbia County. Moved here because I love this community. You can be as involved as you want to be. Our potential is enormous. Let's take advantage of it wisely.
- Laurie Oliver Joseph: City of Scappoose. I love Scappoose because it's a small town but we're so close to everything. The people here are wonderful to work with.
- NJ Johnson: City of Scappoose. I love that this City is growing in a smart way and that's why I'm excited about this project.
- Paul Vogel: Columbia Economic Team. I love Scappoose because I'm on the same page as the chair: smart growth and smart planning. OMIC. Brought in UGB land around those assets. We can all sense that this is a community that has yet to be discovered by the urban area. Smart planning to continue!
- Scott Jensen: Chair of Planning Commission. Planning ahead is really important and I'm proud of city council for taking this step.
- Kim Holmes: Parks and Rec Committee. Best assets are people. Second best asset are the outdoor recreation opportunities.
- Jeannet Santiago: Representative from a historically underrepresented community, Planning Commission. Growth an opportunity. Beautiful place to live. People are great.
- Jeff Weiss: Scappoose Library. I like the people and the way it's growing.
- Jennifer Anderson: Habitat for Humanity. I love the staff at the HS. Enjoying your trails.

3. 50-Year Plan Project Overview

Beth Goodman presented an overview of the Scappoose 50-Year plan project. The discussion that followed is summarized below.

- Patrick: Are the technical products coming as listed in order on the schedule?
- Brian: When we've done this in the past, we couldn't pick land that best fit the community. Are laws about land regarding current zoning and farm/forest/soil classes still relevant/do we have any flexibility these days?
 - Beth - No, can't work around those laws just yet.
- Chair Kessi: I assume we're going to look at best practices. Is there any gold standard that we should look at in terms of a 50-year plan?

- Beth - We will be bringing forward to you best practices and policies around things like housing, econ dev, etc.
- Beth - We are going to work with Urbanism Next: they will help us envision what the future could look like. They can bring best practices and some forward-looking ideas. For example: the development of the Pearl District is an example that many cities nationally have done.
- Christine Turner: How often does a 50-Year Plan happen? Not often at all.
 - Beth - The 50-Year process should be more common, but it isn't.
- Tyler Miller: can you remind us what dictates how much land we can pull into our UGB?
 - Beth - Population forecast.
- Brian: can you remove land from an urban reserve?
 - Beth - Yes, but also no, it might trigger a measure 49 (landowner claims City must pay the loss of their land value)
- Brian: Can we be aspirational? Last time we looked at industrial and commercial from an aspirational perspective. Can the EOA this time be as aspirational?
 - Beth answered that approach may not work as well in this project, but this will be a source of discussion.

4. Public Involvement Plan and Community Conversation Kits

Anais Mathez presented an overview of the public involvement plan and community conversation kit. She explained that anyone could use the kit to host a community conversation. It can be an informal conversation or a presentation and discussion with a committee. Anyone can host a community conversation and submit notes/outcomes of the conversation.

- Vice Chair Turner: Should the conversations include County (not within the City) neighbors. Anais answered that the focus should be people who live within Scappoose city limits, within the UGB, or close to Scappoose.
- Chair Kessi: People may work in Scappoose or have their children go to school in Scappoose but not live in Scappoose. Anais agreed.

Anais asked the question: *“What makes Scappoose special today?”*

- Patrick: Opportunity to do things better and learn from other community's mistakes.
- Len: The City has 300 acres of land at the Airport. Large businesses could locate at the Airport, bringing a lot of employment to Scappoose. That could change Scappoose a lot.
- Chair Kessi: Opportunities for job growth, especially of family wage jobs.

- Jeff Pricher: From the Fire District’s perspective, it is special that the Fire District staff have low turnover, embody the community, and go the extra mile.

Anais asked the question: *“What would you like to change in the future in Scappoose?”*

- Vice Chair Turner: Wants to see a hotel develop in Scappoose, more services for residents and visitors. Would like to have more services and businesses. Scappoose needs more of a sense of community and togetherness and building better charm. Wants to see more of a sense of community.
 - Follow up: Is there a lack of community or something else? Answer: The community is centered on the school and children’s activities. But if you are not connected to the school, you lack this.
- Brian Rosenthal: Hotel is important for Scappoose but may be a bit longer-term. Wants Scappoose to be more self-sufficient, with more restaurants and retail options. That may happen more with more growth. Would like to see home-ownership stay at the levels that they are now, above State averages. Helps with community investment and buy-in for schools.
- Paul Vogel: Wants to change commute patterns. Speaks to employment, training, workforce, where people spend money. Wants people to live and work more in Scappoose. Agrees on need for more restaurants and services.
- Kim: Increase walkability and bikeability. Build on fuel tax? What amenities do similar sized cities have that Scappoose lacks. How to fund the desired amenities.
- Janet: Agrees with need for more restaurants and places to shop. Have more services available in the evening, so that people can go to restaurants, even if they commute out for work. Wants to see more willingness on the community’s behalf to embrace growth.
- Patricia Turpen: We need more jobs in Scappoose. Transportation options will need to change in the next 50-years. Like more transit or perhaps a by-pass in town. Concerned about how to access things like medical services if a person doesn’t drive.
- Patrick: Need better Internet connection and better broadband connections. Work from home opportunities will grow over time, allowing people with high-tech jobs to locate in Scappoose.
- Chair Kessi: The community has potential to support projects and rally together. Also developing a more active downtown, with more services. The City and School District should work together more and engage with each other.
- Jeff Pricher: Being a special district, the Fire District is challenged by laws and requirements that hamper the District. One challenge is the Enterprise Zone, which is good for economic development, but results in lower funding for the Fire District. The other challenge is the Urban Renewal District, which also means that the Fire District does not get funding from the Urban Renewal District. These issues mean the Fire District can’t purchase the equipment needed.

Anais said that the conversation they just had was a great example of the types of input that might be had from community conversations. We are hoping that the SAC members will volunteer to do at least one community conversation each. The conversations need to be concluded by June.

- Chair Kessi suggested that SAC members start with the groups of people they know best.
- Paul asked: There is a lot of interactivity between communities. Should these community conversations include people beyond Scappoose? Laurie: That is acceptable and may give an external view of Scappoose, which may be helpful.
- Paul asked: Should the community conversation be a survey that can be taken by individuals? Anais answered that there is a survey on the City's website that already mirrors the questions in the community conversations.

5. Next Steps

- Upcoming SAC meetings
 - April 26 (HNA Update)
 - May 17
- Annual Town meeting – April 30, 2022
 - Chair Kessi requested a calendar invitation for the next 3 meetings, including the Annual Town Meeting.

6. Discuss and Adopt Team Agreement

Chair Kessi asked if there was any discussion about the team agreement. No one raised concerns or made comments.

Chair Kessi accepted a motion to adopt the team meeting. Tyler made the motion, Paul seconded. All agreed to the agreement. No demurs or abstention.

Tyler asked for the public comment at a particular time during the meeting, to allow people to give comments verbally. Laurie explained that the preference is for written comments. Isaac also emphasized that there will be ample opportunities for comment in public meetings and event forums. Chair Kessi asked that public comments be moved to the beginning of the meetings.

Paul Vogel asked if the Chair could restrict comments to the topics discussed by the Committee, not any other topics such as those beyond the scope of the meetings. Laurie said that the comments should focus on the topics discussed by the Committee. Broader comments about topics not focused on the topics of this project can be brought to the City Council.

Vice Chair Turner asked for tabs for her binders. Laurie agreed to do that.

7. Public Comment

None

8. Adjourn

Chair Kessi adjourned the meeting.

DRAFT



CITY OF SCAPPOOSE, OR

**HOUSING CAPACITY ANALYSIS
(OREGON STATEWIDE PLANNING GOAL 10)**

**20-YEAR HOUSING NEED
2023 - 2043**

April 2022



Acknowledgments

Johnson Economics prepared this report for the City of Scappoose. Johnson Economics and the City of Scappoose thank the many people who helped to develop this document.

City Staff

Advisory Committees

Consultants

MIG
Johnson Economics

This report was prepared in accordance with the requirements of OAR 660 Division 8: Interpretation of Goal 10 Housing. This project is funded by the State of Oregon through the Department of Land Conservation and Development. The contents of this document do not necessarily reflect the views or policies of the State of Oregon.

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I. INTRODUCTION

This analysis outlines a forecast of housing need within the City of Scappoose. Housing need and resulting land need are forecast to 2043 consistent with 20-year need assessment requirements of Oregon Revised Statutes.¹ This report presents a housing need analysis (presented in number and types of housing units) and a residential land need analysis, based on those projections. The study area for this analysis is the city's Urban Growth Boundary (UGB), which contains housing units and population in addition to those in the city boundary.

The primary data sources used in generating this forecast were:

- Portland State University Population Research Center
- U.S. Census
- Claritas Inc.²
- Oregon Employment Department
- City of Scappoose
- Columbia County
- Other sources are identified as appropriate.

This analysis relies heavily on Census data from both the Decennial Census, and the American Community Survey (ACS). Generally, data from the ACS has a larger statistical margin of error than the 10-year Census. This analysis relies whenever possible on the most recent 2020 Decennial Census. While key data such as population and number of households are available from this recent Census, many data sets have not yet been made available. When necessary, the 2020 ACS 5-year estimates have been used instead. The 5-year estimates have the lowest margin of error in comparison to the ACS 3-year and 1-year estimates. All Census data feature some margin of error but remain the best source of data available on many demographic and housing subjects.

II. CITY OF SCAPPOOSE DEMOGRAPHIC PROFILE

SUMMARY

The following table (Figure 2.1) presents a profile of City of Scappoose demographics from the 2000 and 2020 Census. The 2020 population has been forecasted forward to 2023 using the PSU estimated annual growth rate between 2020 and 2025.

- As of the 2020 Decennial Census, the city of Scappoose had an estimated population of 8,010 people *within the city boundary*. Based on the PSU forecasted growth rate this would indicate an estimated population of 8,328 residents in 2023.
- Based on estimated population, Scappoose is the 65th largest city in the state by city population. Scappoose has roughly half the population of St. Helens, the nearest city to the north.
- Based on GIS data, there are an estimated additional 183 housing units, or 466 people who live outside of the city limits, but within the city's UGB. This indicates a total estimated population of 8,794 residents within the UGB by 2023. *The study area for this analysis is the city's UGB, as this is the area in which housing and land needs must be assessed under statute.*

¹ ORS 197.628; OAR 660-025

² Claritas Inc. is a third-party company providing data on demographics and market segmentation. It licenses data from the Nielson Company which conducts direct market research including surveying of households across the nation. Nielson combines proprietary data with data from the U.S. Census, Postal Service, and other federal sources, as well as local-level sources such as Equifax, Vallassis and the National Association of Realtors. Projections of future growth by demographic segments are based on the continuation of long-term and emergent demographic trends identified through the above sources.

- Scappoose has experienced steady growth in population within the UGB, growing an estimated 67% since 2000. In contrast, Columbia County and the state experienced population growth of 22% and 25% respectively during that same period. (US Census and PSU Population Research Center)
- The Scappoose UGB will be home to an estimated 3,458 households in 2023, an increase of over 1,400 households since 2000. The percentage of families has fallen somewhat since 2000, from 72% to 69%. The city has a similar share of family households as Columbia County (67%) and a higher share than the state (62%).
- Average household size is estimated to have remained stable since 2000. Scappoose’s estimated average household size is now 2.54 persons, roughly equivalent to the Columbia County average of 2.6 and the statewide average of 2.5.

FIGURE 2.1: SCAPPOOSE DEMOGRAPHIC PROFILE (URBAN GROWTH BOUNDARY)

POPULATION, HOUSEHOLDS, FAMILIES, AND YEAR-ROUND HOUSING UNITS					
	2000 (Census)	2020 (Census)	Growth 00-20	2023 (PSU)	Growth 20-23
Population ¹	5,265	8,475	61%	8,794	4%
Households ²	2,048	3,333	63%	3,458	4%
Families ³	1,483	2,313	56%	2,400	4%
Housing Units ⁴	2,133	3,346	57%	3,578	7%
Group Quarters Population ⁵	33	44	33%	46	4%
<i>Household Size (non-group)</i>	<i>2.53</i>	<i>2.54</i>	<i>1%</i>	<i>2.54</i>	<i>0%</i>
<i>Avg. Family Size</i>	<i>3.00</i>	<i>3.28</i>	<i>9%</i>	<i>3.28</i>	<i>0%</i>
PER CAPITA AND MEDIAN HOUSEHOLD INCOME					
	2000 (Census)	2020 (Census)	Growth 00-20	2023 (Proj.)	Growth 20-23
Per Capita (\$)	\$20,837	\$35,997	na	\$39,073	9%
Median HH (\$)	\$47,796	\$79,375	na	\$85,650	8%

SOURCE: Census, PSU Population Research Center, and Johnson Economics

Census Tables: DP-1(2000, 2020); DP-3 (2000); S1901; S19301

1 From PSU Population Research Center, forecasted growth rate 2020-2040. City limits population, plus estimate of external population within UGB: 183 external housing units (GIS) X 2.54 avg. household size = 466 external population within UGB.

2 2023 Households = (2023 population - Group Quarters Population)/2023 HH Size (based on 2020 ACS 5-Year)

3 Ratio of 2023 Families to total HH is based on 2020 Decennial Census

4 2023 units are the '20 Census total plus units permitted '20 through '21, plus assumption for '22 and '23 (source: Census, City)

5 Ratio of 2023 Group Quarters Population to Total Population is kept constant from 2020.

A. POPULATION GROWTH

Since 2000, this analysis estimates that Scappoose will grow by over 3,525 people within the UGB, or 67% in 23 years. This was much higher than the countywide rate of growth. Columbia County has grown an estimated 22% since 2000 (PSU Population Research Center).

B. HOUSEHOLD GROWTH & SIZE

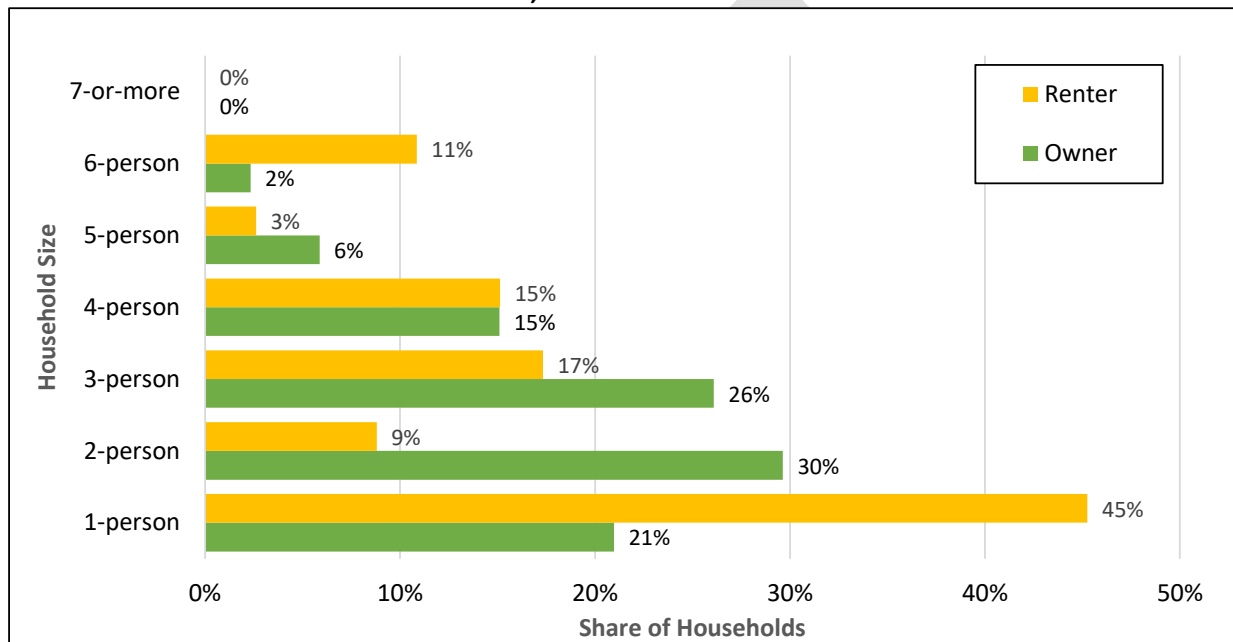
As of 2023, the city will have an estimated 3,458 households. Since 2000, Scappoose will add an estimated 1,410 households. This is an average of roughly 61 households annually during this period. The growth since 2000 has

roughly kept pace with the growth in new housing units, which were permitted at an average rate of 61 units per year between 2000 and 2021. This analysis assumes that a similar rate of production as seen since 2020, carries forward in 2022 and 2023.

Scappoose’s average household size of 2.54 people, with 69% family households, is in keeping with the average across Columbia County. There has been a general trend in Oregon and nationwide towards declining household size as birth rates have fallen, more people have chosen to live alone, and the Baby Boomers have become “empty nesters.” While this trend of diminishing household size is expected to continue nationwide, there are limits to how far the average can fall.

Figure 2.2 shows the share of households by the number of people for renter and owner households in 2020 (latest data available), according to the Census. Renter households are more likely to have one person. Owner households are more likely to have two or three persons. Household size correlates to housing needs.

FIGURE 2.2: NUMBER OF PEOPLE PER HOUSEHOLD, SCAPPOOSE



SOURCE: US Census, JOHNSON ECONOMICS LLC
 Census Tables: B25009 (2020 ACS 5-yr Estimates)

C. FAMILY HOUSEHOLDS

The Census defines family households as two or more persons, related by marriage, birth or adoption and living together. As of the 2020 Census, an estimated 69% of total Scappoose households were family households, down slightly from 72% of households in 2000. The total number of family households in Scappoose is estimated to grow by over 900 between 2000 and 2023. In 2023, family households in Scappoose will have an estimated average size of 3.3 people. All households (family and non-family) have an average size of 2.54.

D. GROUP QUARTERS POPULATION

The City of Scappoose has an estimated group quarters population of 0.5% of the total population, or roughly 46 persons. Group quarters include such shared housing situations as nursing homes, prisons, dorms, group residences, military housing, or shelters. For the purposes of this analysis, these residents are removed from the estimated population total, before determining the number of other types of housing that are needed for non-group households. In Scappoose, most group quarters seem to be in group housing situations for seniors or other adults with specialized needs.

E. HOUSING UNITS

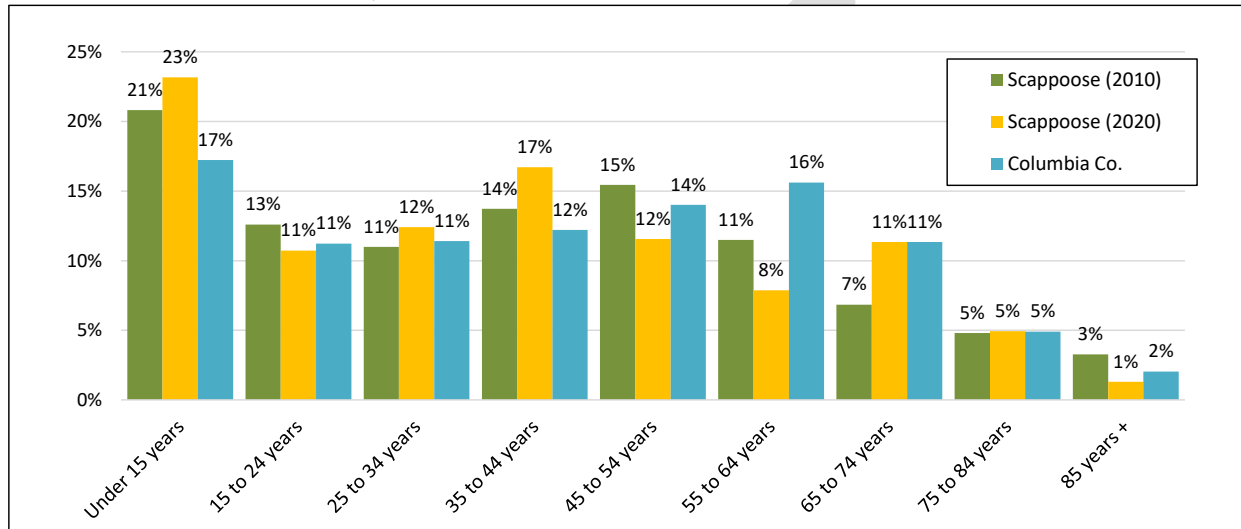
Data from the City of Scappoose and the US Census indicate that the city added an estimated 1,258 new housing units between 2000 and 2021, representing 62% growth in the housing stock.

As of 2023, the city will have an estimated housing stock of roughly 3578 units for its 3,458 estimated households within the UGB. This translates to an estimated average vacancy rate of 3%.

F. AGE TRENDS

The following figure shows the share of the population falling in different age cohorts between the 2010 Census and the most recent 5-year American Community Survey estimates. As the chart shows, children and young adults have grown as a share of the population, as have the retirement generations of those 65 and older. The middle age segments have fallen as a share of the population as the large Baby Boom generation has aged. This is in keeping with the national trend. Overall, Scappoose has a younger population than the county, with a greater share of young and middle-aged cohorts, but a smaller share of those aged 55 to 64 years.

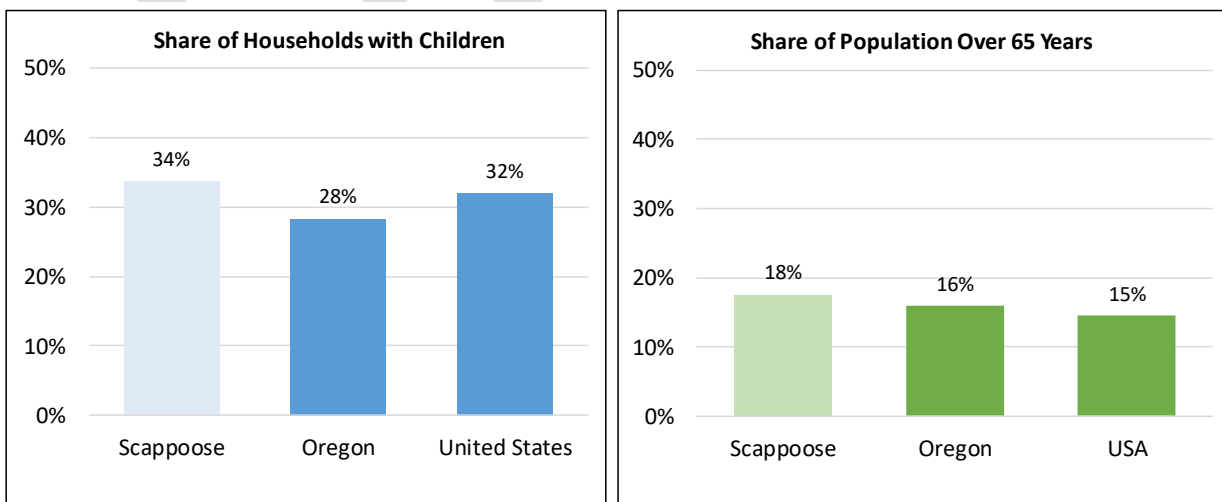
FIGURE 2.4: AGE COHORT TRENDS, 2010 - 2020



SOURCE: US Census, JOHNSON ECONOMICS LLC
 Census Tables: QT-P1 (2000); S0101 (2020 ACS 5-yr Estimates)

- Despite the general aging of the population, an estimated 82% of the population is under 65 years of age.
- In the 2020 ACS, the local median age was an estimated 37 years, similar to 40 years across Oregon.

FIGURE 2.5: SHARE OF HOUSEHOLDS WITH CHILDREN/ POPULATION OVER 65 YEARS (SCAPPOOSE)



SOURCE: US Census, JOHNSON ECONOMICS LLC
 Census Tables: B11005; S0101 (2020 ACS 5-yr Estimates)

Figure 2.5 presents the share of households with children, and the share of the population over 65 years of age for comparison. Compared to state and national averages, Scappoose has a slightly higher share of households with children. At 18%, the share of the population over 65 is slightly higher than the state and national figures.

G. INCOME TRENDS

The following figure presents data on Scappoose’s income trends.

FIGURE 2.6: INCOME TRENDS, 2000 – 2023 (SCAPPOOSE)

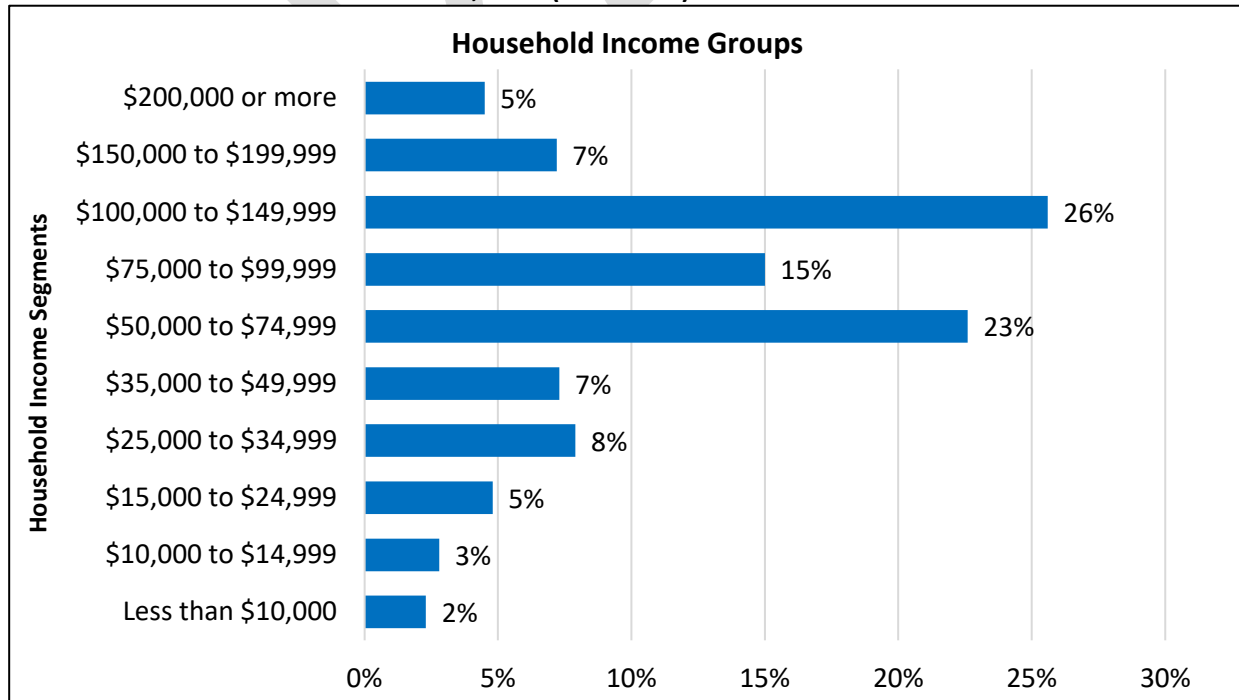
PER CAPITA AND MEDIAN HOUSEHOLD INCOME					
	2000	2020	Growth	2023	Growth
	(Census)	(Census)	00-20	(Proj.)	20-23
Per Capita (\$)	\$20,837	\$35,997	na	\$39,073	9%
Median HH (\$)	\$47,796	\$79,375	na	\$85,650	8%

SOURCE: Census, PSU Population Research Center, and Johnson Economics

Census Tables: DP-1 (2000, 2020); DP-3 (2000); S1901; S19301

- Scappoose’s estimated median household income was \$79,375 as of the 2020 ACS 5-Year estimates. This was 27% higher than the Columbia County median of \$62,300, and 42% higher than the statewide median of \$56,000. Projected forward three years, using the average growth rate achieved between 2000 and 2020, the median household income in 2023 will be an estimated \$85,650.
- Using the same methodology, Scappoose’s per capita income will be roughly \$39,000 in 2023.
- Median income grew an estimated 66% between 2000 and 2020, in real dollars. Inflation was an estimated 56% over this period, so the local median income has well exceeded inflation. This is not the case in many regions and nationally, where income growth has not kept pace with inflation.

FIGURE 2.7: HOUSEHOLD INCOME COHORTS, 2020 (SCAPPOOSE)



SOURCE: US Census, Census Tables: S1901 (2020 ACS 5-yr Est.)

Figure 2.7 presents the estimated distribution of households by income as of 2020. The largest income cohorts are those households earning between \$100k and \$150k, followed by households earning between \$50,000 and \$75,000. Thirty-eight percent of households earn more than \$100,000.

- 25% of households earn less than \$50k per year, while 75% of households earn \$50k or more.
- 10% of households earn less than \$25k per year.

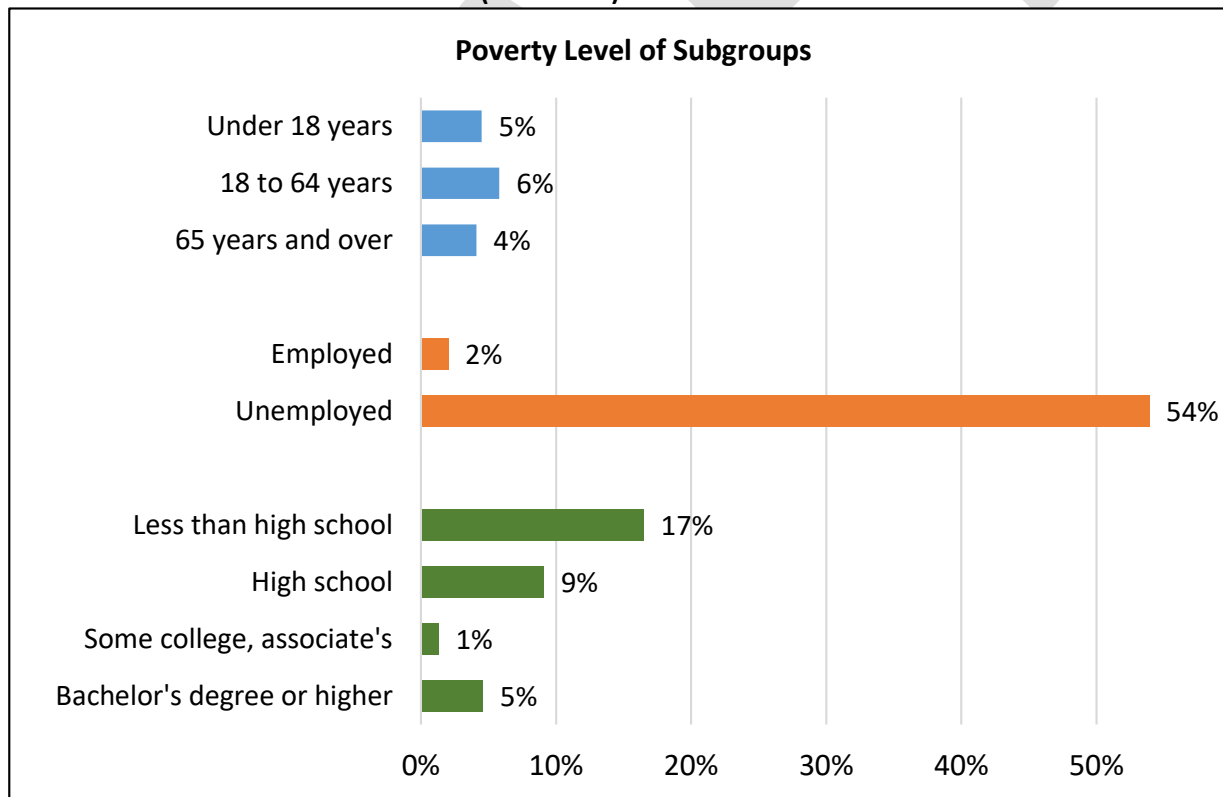
H. POVERTY STATISTICS

According to the US Census, the official poverty rate in Scappoose is an estimated 5% over the most recent period reported (2020 5-year estimates).³ This is roughly 380 individuals in Scappoose. In comparison, the official poverty rate in Columbia County is 12%, and at the state level is 17%. In the 2016-20 period:

- The Scappoose poverty rate is low among most groups, falling between 4% to 6% across age groups.
- For those without a high school diploma, the poverty rate is 17%. For those with higher rates of education, the estimated poverty rate falls.
- Among those who are unemployed the poverty rate is 54%, while it is 2% for those who are employed.

Information on affordable housing is presented in Section III of this report.

FIGURE 2.8: POVERTY STATUS BY CATEGORY (SCAPPOOSE)



SOURCE: US Census
Census Tables: S1701 (2020 ACS 5-yr Est.)

I. EMPLOYMENT LOCATION TRENDS

This section provides an overview of employment and industry trends in Scappoose that are related to housing.

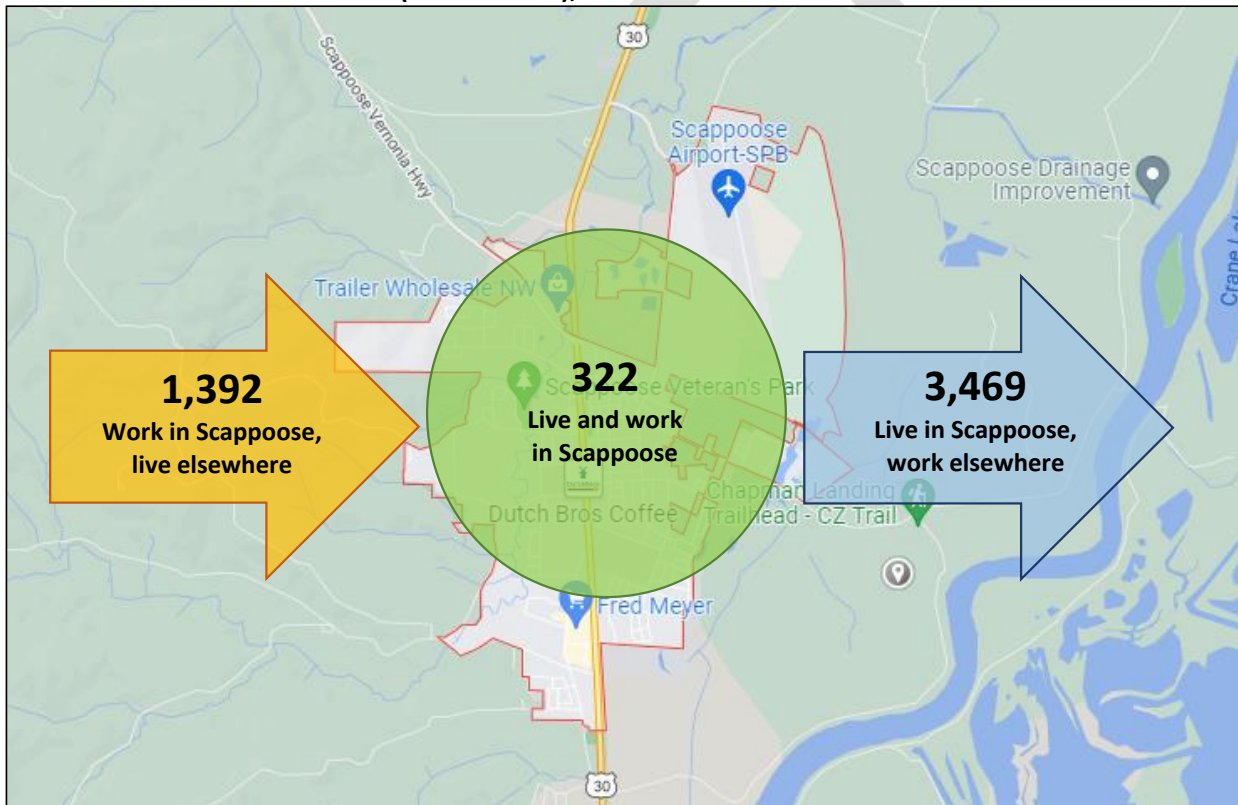
³ Census Tables: S1701 (2020 ACS 5-yr Estimates)

Commuting Patterns: The following figure shows the inflow and outflow of commuters to Scappoose according to the Census Employment Dynamics Database. These figures reflect “covered employment” as of 2019, the most recent year available. Covered employment refers to those jobs where the employee is covered by federal unemployment insurance. This category does not include many contract employees and self-employed and therefore is not a complete picture of local employment. The figure discussed here is best understood as indicators of the general pattern of commuting and not exact figures.

As of 2019, the Census estimated there were roughly 1,715 covered employment jobs located in Scappoose. Of these, an estimated 322 or 19%, were held by local residents, while nearly 1,400 employees commuted into the city from elsewhere. This general pattern is fairly common among many communities within commuting distance to the Metro area. The most common places of residence of workers commuting into the city are St. Helens, Portland, Hillsboro, and Warren.

Similarly, of the estimated 3,790 employed Scappoose residents, 92% of them commute elsewhere to their employment. The most common destinations for Scappoose commuters are Portland, Hillsboro, St. Helens and Beaverton. Smaller shares work elsewhere in the Portland metro or in the mid-Willamette Valley.

FIGURE 2.9: COMMUTING PATTERNS (PRIMARY JOBS), SCAPPOOSE



Source: US Census Longitudinal Employer-Household Dynamics

Jobs/Household Ratio: Scappoose features a low jobs-to-households ratio. There are an estimated 1,715 jobs in Scappoose (covered), and an estimated 3,458 households in the Scappoose UGB. This represents 0.5 jobs per household. There is no standard jobs-to-households ratio that is right for all communities, but it can provide a guide to the balance between employment uses and residential uses in the city. In the case of Scappoose, most working local residents must work outside of the community.

III. CURRENT HOUSING CONDITIONS

This section presents a profile of the current housing stock and market indicators in Scappoose. This profile forms the foundation to which current and future housing needs will be compared.

A. HOUSING TENURE

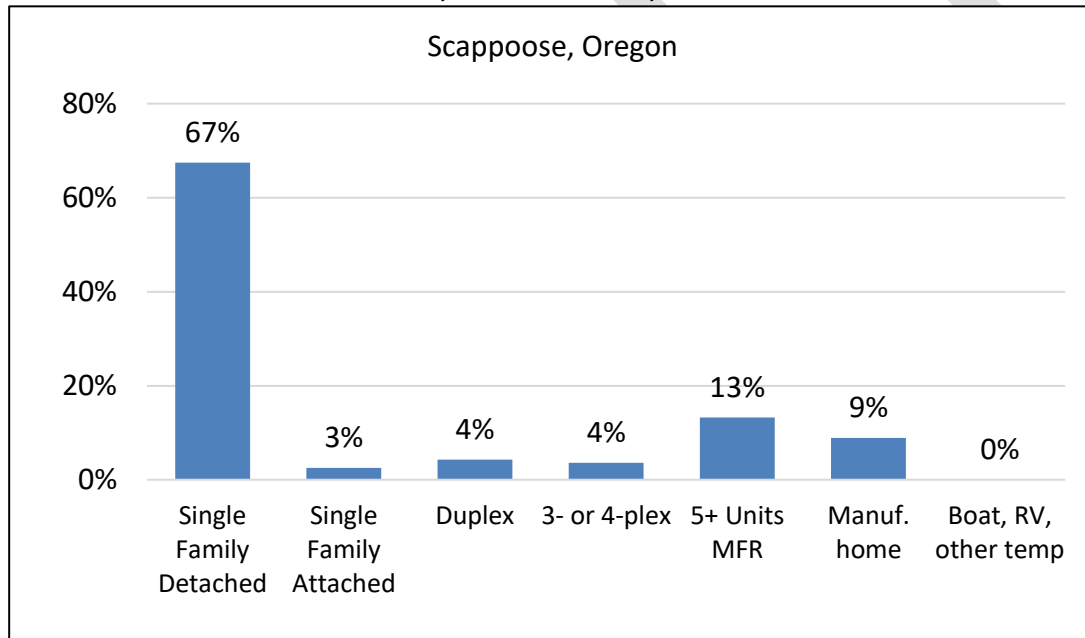
Scappoose has a greater share of homeowner households than renter households. A blended estimate of data from the American Community Survey over the past decade⁴ estimates that 69% of occupied units were owner occupied, and 31% renter occupied. The ownership rate is similar to the rate in 2000 (70%). During this period the statewide ownership rate fell to 61%. Nationally, the homeownership rate is now near the historical average of 65%, after climbing from the late 1990's to 2004.

The estimated ownership rate is higher across Columbia County (75%) and lower statewide (61%).

B. HOUSING STOCK

As shown in Figure 2.1, the Scappoose UGB will have an estimated 3,578 housing units in 2023, with a vacancy rate of just over 3% (includes ownership and rental units). By 2023, the housing stock is projected to have increased by nearly 1,440 units since 2000, or growth of 68%.

FIGURE 3.1: ESTIMATED SHARE OF UNITS, BY PROPERTY TYPE, 2023



SOURCE: US Census, City of Scappoose

Figure 3.1 shows the estimated number of units by type in 2023 based on forecasting forward from the most recent US Census and ACS data. Detached single-family homes represent an estimated 67% of housing units. Manufactured homes represent an additional 9% of the inventory.

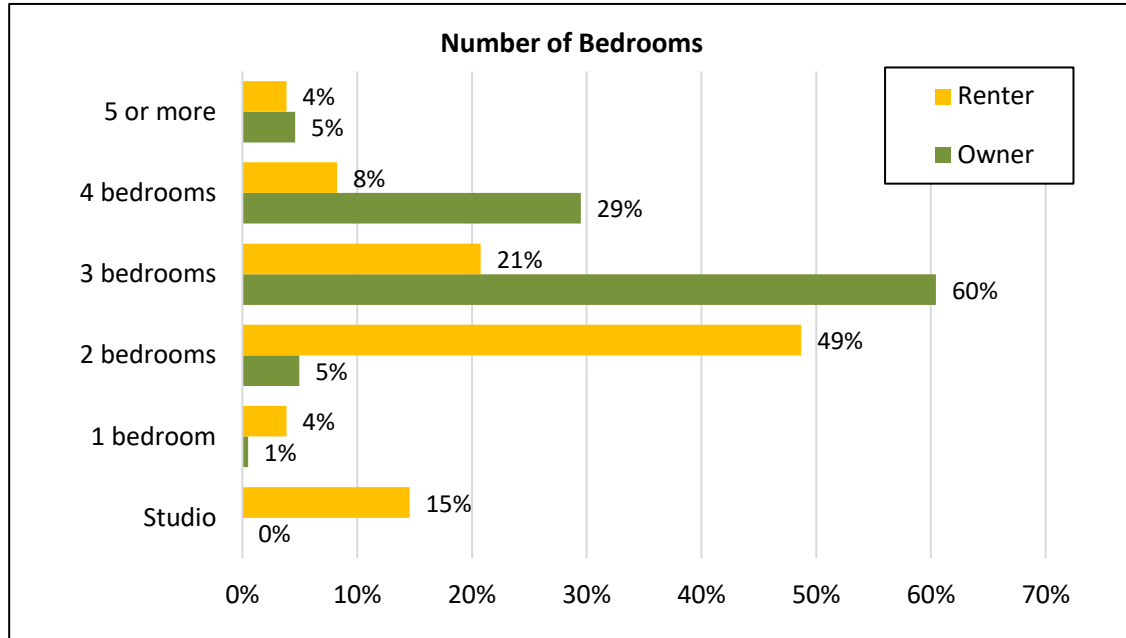
Units in larger apartment complexes of 5 or more units represent only 13% of units, and other types of attached homes represent an additional 11% of units. (Attached single family generally includes townhomes, and some 2 to 4-plexes which are separately metered.)

⁴ The most recent ACS 5-year data from 2020, showed a significant jump in the ownership rate to 73%, from an estimate of 69% in the 2019 ACS 5-year data. The 2020 estimate seems like an anomaly, and also featured a higher margin of error than prior years. In order to arrive at a more dependable assumption for tenure in Scappoose, this analysis uses a blended average of the estimated ownership rate between the 2010 Census, and the ACS 5-year data of each subsequent year (2011 – 2020), for a total count of 11 estimates. The median and mean average of these years is an ownership rate of 69%. All but two of the data points were between 68% and 71%, with the outliers being 73% (2020) and 66% (2018).

C. NUMBER OF BEDROOMS

Figure 3.2 shows the share of units for owners and renters by the number of bedrooms they have. In general, owner-occupied units are much more likely to have three or more bedrooms, while renter-occupied units are more likely to have two or fewer bedrooms. However, rental units with three or more bedrooms do make up nearly 40% of units.

FIGURE 3.2: NUMBER OF BEDROOMS FOR OWNER AND RENTER UNITS, 2020



SOURCE: US Census
Census Tables: B25042 (2020 ACS 5-year Estimates)

D. UNIT TYPES BY TENURE

As Figure 3.3 and 3.4 show, a large share of owner-occupied units (88%), are detached homes, which is related to why owner-occupied units tend to have more bedrooms. Renter-occupied units are much more distributed among a range of structure types. About 27% of rented units are estimated to be detached homes or manufactured homes, while the remainder are some forms of attached unit. Nearly 42% of rental units are in larger apartment complexes.

FIGURE 3.3: CURRENT INVENTORY BY UNIT TYPE, FOR OWNERSHIP AND RENTAL HOUSING

OWNERSHIP HOUSING

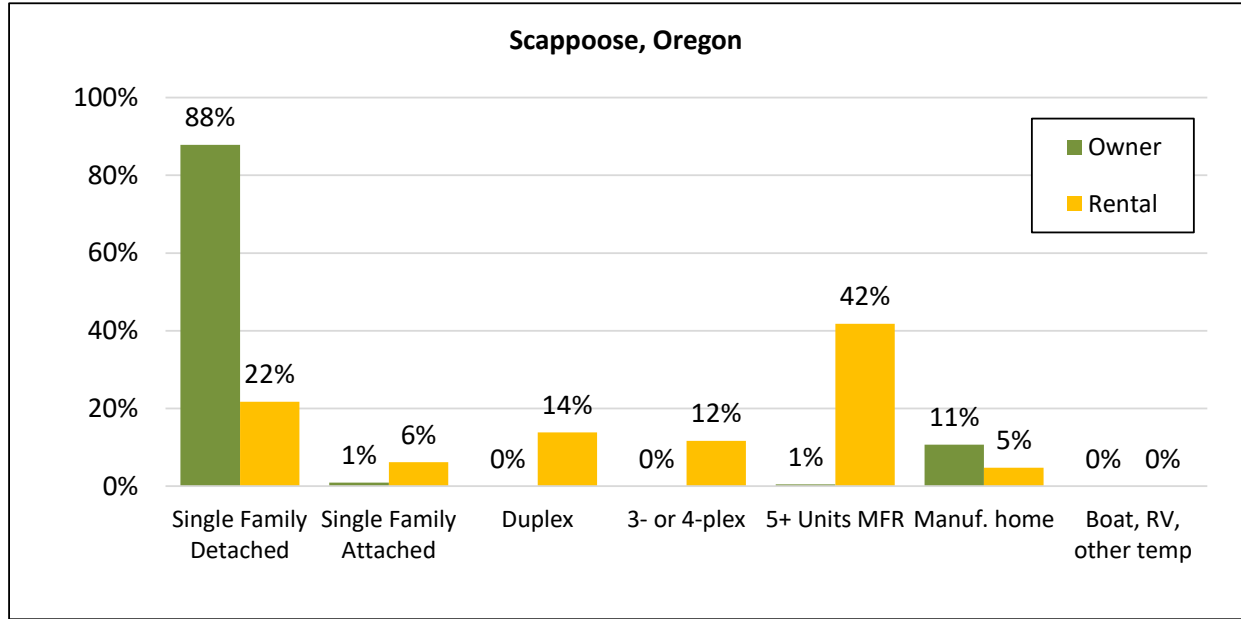
OWNERSHIP HOUSING								
	Single Family Detached	Single Family Attached	Duplex	3- or 4-plex	5+ Units MFR	Manuf. home	Boat, RV, other temp	Total Units
Totals:	2,060	22	0	0	12	251	0	2,345
Percentage:	87.8%	0.9%	0.0%	0.0%	0.5%	10.7%	0.0%	100%

RENTAL HOUSING

RENTAL HOUSING								
	Single Family Detached	Single Family Attached	Duplex	3- or 4-plex	5+ Units MFR	Manuf. home	Boat, RV, other temp	Total Units
Totals:	227	64	144	122	437	50	0	1,044
Percentage:	21.7%	6.2%	13.8%	11.7%	41.8%	4.8%	0.0%	100%

Sources: US Census, JOHNSON ECONOMICS, CITY OF SCAPPOOSE

FIGURE 3.4: CURRENT INVENTORY BY UNIT TYPE, BY SHARE

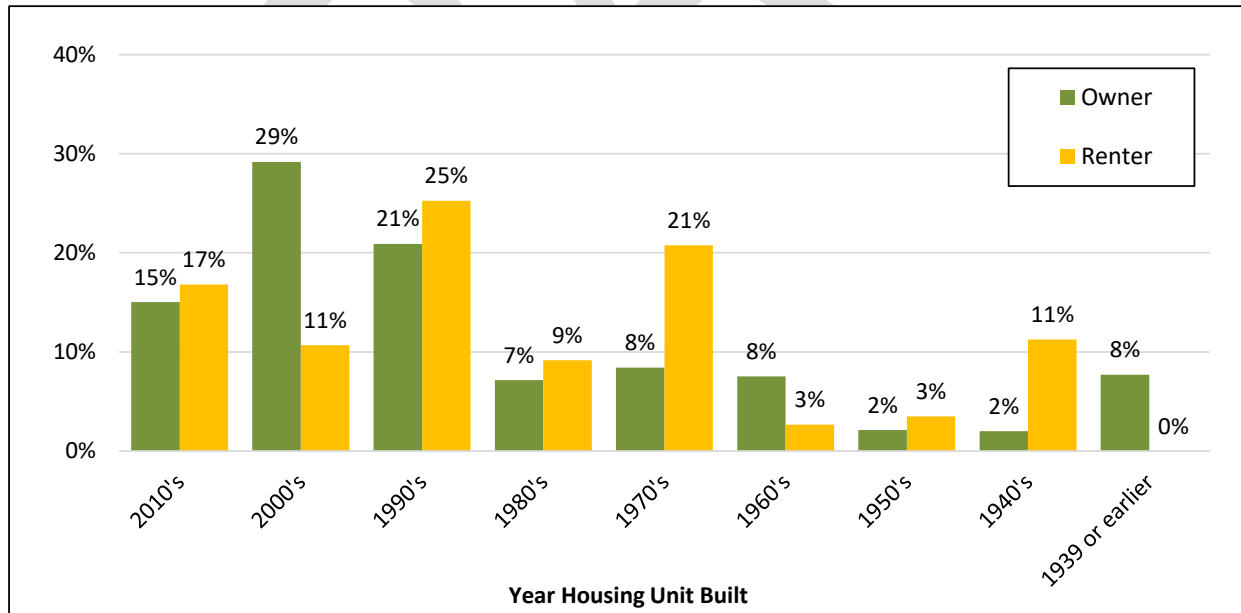


Sources: US Census, JOHNSON ECONOMICS, CITY OF SCAPPOOSE

E. AGE AND CONDITION OF HOUSING STOCK

Scappoose’s housing stock reflects the pattern of development over time. An estimated 15% of owner housing and 17% of renter housing has been built over the last decade. An additional 50% of ownership housing was built in the 1990’s and 2000’s. Much of the remaining rental stock was built in the 1990’s and 1970’s.

FIGURE 3.5: AGE OF UNITS FOR OWNERS AND RENTERS



SOURCE: US Census
 Census Tables: B25036 (2020 ACS 5-year Estimates)

- Unfortunately, good quantitative data on housing condition is generally unavailable without an intensive on-site survey of all local housing that is beyond the scope of this analysis. Census categories related to housing condition are ill-suited for this analysis, dealing with such issues as units without indoor plumbing, which was more common in the mid-20th Century, but is an increasingly rare situation. Age of units serves as the closest reliable proxy for condition with available data.

- For ownership units, older homes may be in poor condition, but are also more likely to have undergone some repair and renovation over the years. Rental units are more likely to degrade steadily with age and wear-and-tear, and less likely to receive sufficient reinvestment to keep them in top condition, though this is not universally true.

F. HOUSING COSTS VS. LOCAL INCOMES

Figure 3.6 shows the share of owner and renter households who are paying more than 30% of their household income towards housing costs, by income segment. Spending 30% or less on housing costs is a common measure of “affordability” used by HUD and others, and in the analysis presented in this report. Households spending more than 30% of income on housing are defined by HUD as “rent burdened” or “cost burdened.”

As one would expect, households with lower incomes tend to spend more than 30% of their income on housing, while incrementally fewer of those in higher income groups spend more than 30% of their incomes on housing costs. Of those earning less than \$20,000, it is estimated that all of owner and renter households spend more than 30% of income on housing costs.

In total, the US Census estimates that over 27% of Scappoose households pay more than 30% of income towards housing costs (2020 American Community Survey, B25106)

FIGURE 3.6: SHARE OF HOUSEHOLDS SPENDING MORE THAN 30% ON HOUSING COSTS, BY INCOME GROUP



Sources: US Census, JOHNSON ECONOMICS
Census Table: B25106 (2020ACS 5-yr Estimates)

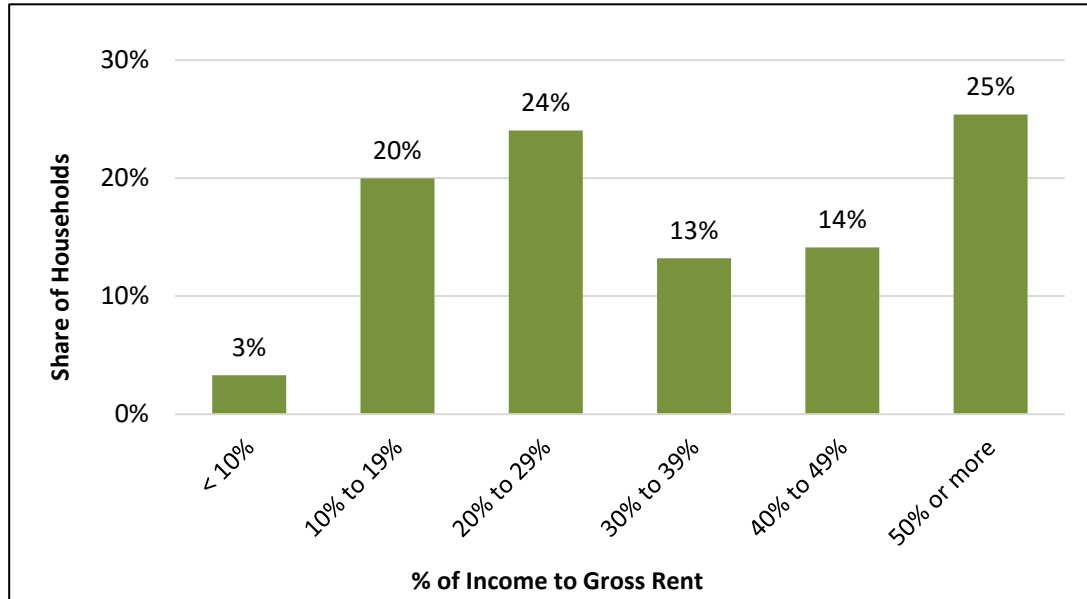
Housing is generally one of a household’s largest living costs, if not the largest. The ability to find affordable housing options, and even build wealth through ownership, is one of the biggest contributors to helping lower income households save and cultivate wealth. Even if renting, affordable housing costs allow for more household income to be put to other needs, including savings.

The following figure shows the percentage of household income spent towards gross rent⁵ for local renter households only. This more fine-grained data shows that not only are 52% of renters spending more than 30% of their income on gross rent, but an estimated 25% of renters are spending 50% or more of their income on housing and are considered severely rent-burdened.

⁵ The Census defines Gross Rent as “the contract rent plus the estimated average monthly cost of utilities (electricity, gas, and water and sewer) and fuels (oil, coal, kerosene, wood, etc.) if these are paid by the renter (or paid for the renter by someone else).” Housing costs for homeowners include mortgage, property taxes, insurance, utilities and condo or HOA dues.

Renters are disproportionately lower income relative to homeowners. Housing cost burdens are felt more broadly for these households, and as the analysis presented in a later section shows there is a need for more affordable rental units in Scappoose, as in most communities.

FIGURE 3.7: PERCENTAGE OF HOUSEHOLD INCOME SPENT ON GROSS RENT, SCAPPOOSE RENTER HOUSEHOLDS



Sources: US Census, JOHNSON ECONOMICS
 Census Table: B25070 (2020 ACS 5-yr Estimates)

G. PUBLICLY ASSISTED HOUSING

Scappoose is home to 47 subsidized affordable units in three separate properties. One property offers 22 units for agricultural workers. Two properties offer a total of 25 units for the elderly or disabled. These are properties that are funded through HUD programs, tax credits and other programs which guarantee subsidized rents for qualified households.

The high share of renters paying over 30% of their income towards housing costs indicates that there is an ongoing need for rental units at the lowest price points.

Agricultural Worker Housing: Scappoose is currently home to one property dedicated to agricultural workers with 22 units. Many farm businesses in the region provide some temporary or permanent housing for their workers outside of incorporated cities as well. This population may also be served by other available affordable units.

Homelessness:

The most recent one-night “Point in Time” homeless count reported by the Oregon Department of Housing and Community Services (OHCS) was in 2019. The count found an estimated 342 homeless individuals *across the county*. While the Point-in-Time count is one of the few systematized efforts to count homelessness across the country in a regular, structured way, it is widely thought to undercount the population of homeless and precarious households. In particular, those staying temporarily in the homes of friends and family are in a precarious housing situation, but unlikely to be counted in the one-night count. In addition to the impossibility of finding all homeless people on the streets, the count is conducted in late January, when homeless counts are likely near their lowest of the year due to the inclement weather and relies on self-reporting.

A recent analysis prepared for OHCS to test a potential approach for preparing Housing Needs Analyses on a regional basis, included estimates of homeless population in Oregon communities, including Scappoose. The approach utilizes a combination of data from the bi-annual Point-in-Time count and from tracking of homeless school-aged children in keeping with the McKinney-Vento Act. The analysis estimated 145 homeless households in

Scappoose as of mid-2020. These include households who are unsheltered, in temporary shelter, or staying with friends or relatives. These households are a component of current and future housing need.

The persistence of homelessness speaks to the need for continuing to build a full spectrum of services and housing types to shelter this population, from temporary shelter to subsidized affordable housing.

An analysis of the ability of current and projected housing supply to meet the needs of low-income people, and the potential shortfall, is included in the following sections of this report.

DRAFT

IV. CURRENT HOUSING NEEDS (CITY OF SCAPPOOSE UGB)

The profile of current housing conditions in the study area is based on Census 2020 and informed by the Portland State University Population Research Center (PRC). The 2020 Census estimate was projected forward to 2023 using the PSU forecasted growth rate of 1.3% between 2020 and 2023. In addition, the estimated number of residents living outside the city boundary, but within the UGB was counted.

FIGURE 4.1: CURRENT HOUSING PROFILE (2023)

CURRENT HOUSING CONDITIONS (2023)		SOURCE
Total 2023 Population:	8,794	PSU Pop. Research Center
- Estimated group housing population:	46 (0.5% of Total)	US Census
Estimated Non-Group 2023 Population:	8,748 (Total - Group)	
Avg. HH Size:	2.54	US Census
Estimated Non-Group 2023 Households:	3,458 (Pop/HH Size)	
Total Housing Units:	3,578 (Occupied + Vacant)	Census 2010 + permits
Occupied Housing Units:	3,458 (= # of HH)	
Vacant Housing Units:	120 (Total HH - Occupied)	
Current Vacancy Rate:	3.3% (Vacant units/ Total units)	

Sources: Johnson Economics, City of Scappoose, PSU Population Research Center, U.S. Census

*This table reflects population, household and housing unit projections shown in Figure 2.1

We estimate a 2023 population of roughly 8,800 residents within the UGB, living in 3,458 households (excluding group living situations). Average household size is 2.54 persons.

There are an estimated 3,578 housing units in the UGB, indicating a very low estimated vacancy rate of 3%. This includes units vacant for any reason, not just those which are currently for sale or rent.

ESTIMATE OF CURRENT HOUSING DEMAND

Following the establishment of the current housing profile, the current housing demand was determined based upon the age and income characteristics of current households.

The analysis considered the propensity of households in specific age and income levels to either rent or own their home (tenure), in order to derive the current demand for ownership and rental housing units and the appropriate housing cost level of each. This is done by combining data on tenure by age, and tenure by income, from the Census American Community Survey (tables: B25007 and B25118, 2019 ACS 5-yr Estimates).

The analysis takes into account the average amount that owners and renters tend to spend on housing costs. For instance, lower income households tend to spend more of their total income on housing, while upper income households spend less on a percentage basis. In this case, it was assumed that households in lower income bands would *prefer* housing costs at no more than 30% of gross income (a common measure of affordability). Higher income households pay a decreasing share down to 20% for the highest income households.

While the Census estimates that most low-income households pay more than 30% of their income for housing, this is an estimate of current *preferred* demand. It assumes that low-income households prefer (or demand) units affordable to them at no more than 30% of income, rather than more expensive units.

Figure 4.2 presents a snapshot of current housing demand (i.e., preferences) equal to the number of households in the study area (3,458). The breakdown of tenure (owners vs. renters) reflects data from the 2019 ACS.⁶

FIGURE 4.2: ESTIMATE OF CURRENT HOUSING DEMAND (2023)

Ownership				
Price Range	# of Households	Income Range	% of Total	Cumulative
\$0k - \$80k	65	Less than \$15,000	2.7%	2.7%
\$80k - \$130k	117	\$15,000 - \$24,999	4.9%	7.6%
\$130k - \$180k	96	\$25,000 - \$34,999	4.0%	11.6%
\$180k - \$240k	202	\$35,000 - \$49,999	8.4%	20.0%
\$240k - \$320k	327	\$50,000 - \$74,999	13.7%	33.7%
\$320k - \$370k	370	\$75,000 - \$99,999	15.5%	49.1%
\$370k - \$440k	309	\$100,000 - \$124,999	12.9%	62.0%
\$440k - \$510k	266	\$125,000 - \$149,999	11.1%	73.1%
\$510k - \$680k	326	\$150,000 - \$199,999	13.6%	86.8%
\$680k +	317	\$200,000+	13.2%	100.0%
Totals:	2,393		% of All:	69.2%

Rental				
Rent Level	# of Households	Income Range	% of Total	Cumulative
\$0 - \$400	119	Less than \$15,000	11.2%	11.2%
\$400 - \$700	104	\$15,000 - \$24,999	9.7%	20.9%
\$700 - \$900	202	\$25,000 - \$34,999	19.0%	39.9%
\$900 - \$1200	161	\$35,000 - \$49,999	15.1%	55.0%
\$1200 - \$1600	201	\$50,000 - \$74,999	18.9%	73.9%
\$1600 - \$1900	33	\$75,000 - \$99,999	3.1%	76.9%
\$1900 - \$2200	81	\$100,000 - \$124,999	7.6%	84.6%
\$2200 - \$2500	95	\$125,000 - \$149,999	9.0%	93.5%
\$2500 - \$3400	44	\$150,000 - \$199,999	4.1%	97.7%
\$3400 +	25	\$200,000+	2.3%	100.0%
Totals:	1,065		% of All:	30.8%

All Households	3,458
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Sources: PSU Population Research Center, Claritas., Census, JOHNSON ECONOMICS
 Census Tables: B25007, B25106, B25118 (2019 ACS 5-yr Estimates)
 Claritas: Estimates of income by age of householder

The estimated home price and rent ranges are irregular because they are mapped to the affordability levels of the Census income level categories. For instance, an affordable home for those in the lowest income category (less than \$15,000) would have to cost \$80,000 or less. Affordable rent for someone in this category would be \$400 or less.

⁶ As discussed in Footnote 4 (page 10), this analysis has used a blended average of Census tenure estimates over the last decade. That blended average arrived at an estimate of 69% ownership rate. The 2019 ACS 5-year data tenure data also reports a 69% ownership rate. Specific tables from that ACS are used here to reflect the blended ownership rate.

The affordable price level for ownership housing assumes 30-year amortization, at an interest rate of 5% (significantly more than the current rate, but in line with historic norms), with a 10% down payment. These assumptions are designed to represent prudent lending and borrowing levels for ownership households. The 30-year mortgage commonly serves as the standard. In the 2000's, down payment requirements fell significantly, but standards have tightened somewhat since the 2008/9 credit crisis. While 20% is often cited as the standard for most buyers, it is common for homebuyers, particularly first-time buyers, to pay significantly less than this using available programs.

Interest rates are subject to disruption from national and global economic forces, and therefore impossible to forecast beyond the short term. The 5% used here is roughly the average 30-year rate over the last 20 years. The general trend has been falling interest rates since the early 1980's, but coming out of the recent recession, many economists believe that rates cannot fall farther and must begin to climb as the Federal Reserve raises its rate over the coming years.

Since the 2020 Covid-19 emergency, the Federal Reserve has again cut their benchmark funds rate to near zero, which has reduced mortgage rates moderately, but not dramatically. The economic uncertainty has the effect of making lenders more cautious, and this can balance the effect of a lower federal rate.

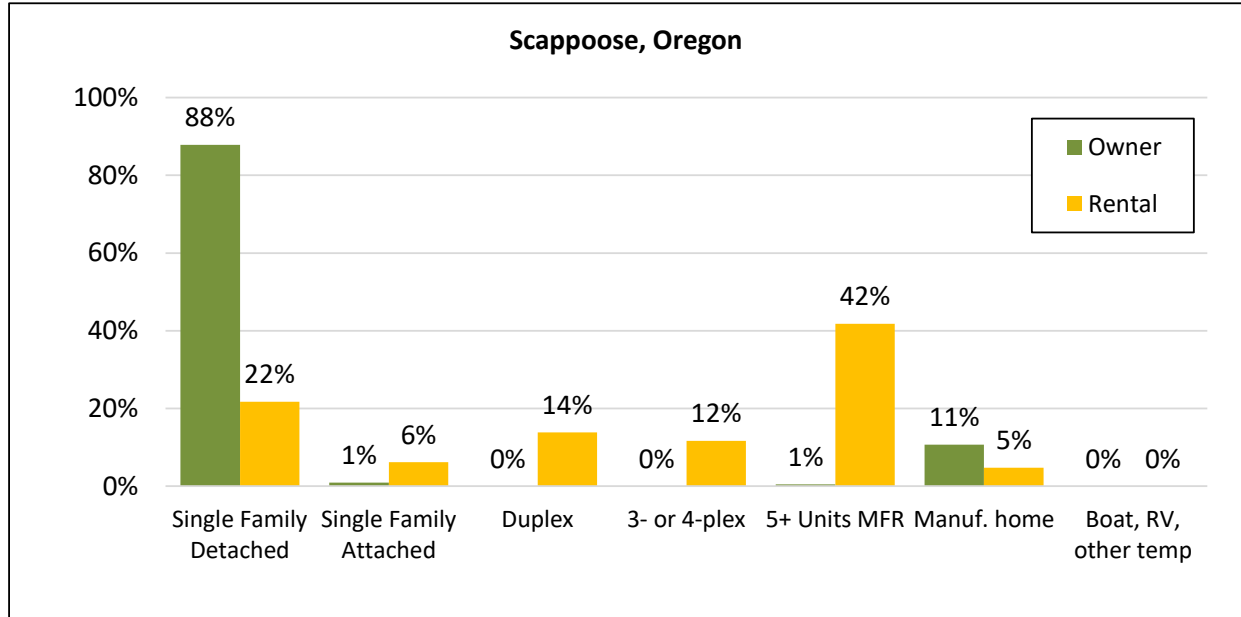
CURRENT HOUSING INVENTORY

The profile of current housing demand (Figure 4.2) represents the preference and affordability levels of households. In reality, the current housing supply (Figures 4.3 and 4.4 below) differs from this profile, meaning that some households may find themselves in housing units which are not optimal, either not meeting the household's own/rent preference, or being unaffordable (requiring more than 30% of gross income).

A profile of current housing supply in Scappoose was estimated based on permit data from the City of Scappoose and Census data from the most recently available 2020 ACS, which provides a profile of housing types (single family, attached, manufactured home, etc.), tenure, housing values, and rent levels. The 5-year estimates from the ACS were used because 3-year and 1-year estimates are not yet available for Scappoose geography.

- An estimated 69% of housing units are ownership units, while an estimated 31% of housing units are rental units. This is similar to the estimated demand profile shown in Figure 4.2. The inventory includes vacant units.
- 88% of ownership units are detached homes, along with 11% manufactured homes and a few attached units. Twenty-seven percent of rental units are either single family homes or manufactured homes, while 42% are in structures of 5 units or more.
- Of total housing units, an estimated 68% are detached homes, and an additional 9% are manufactured homes. Twenty-three percent are some sort of attached unit type.
- The affordability of different unit types is an approximation based on Census data on the distribution of housing units by value (ownership) or gross rent (rentals).
- Most subsidized affordable housing units found in the city are represented by the inventory at the lowest end of the rental spectrum.
- Ownership housing found at the lower end of the value spectrum generally reflect older, smaller homes, or homes in poor condition on small or irregular lots. **It is important to note that these represent estimates of current property value or current housing cost to the owner, not the current market pricing of homes for sale in the city.** These properties may be candidates for redevelopment when next they sell but are currently estimated to have low value.

FIGURE 4.3: PROFILE OF CURRENT HOUSING SUPPLY BY TYPE (2023)



Sources: US Census, PSU Population Research Center, JOHNSON ECONOMICS
 Census Tables: B25004, B25032, B25063, B25075 (2020 ACS 5-yr Estimates)

FIGURE 4.4: PROFILE OF CURRENT HOUSING SUPPLY, ESTIMATED AFFORDABILITY (2023)

Income Range	Ownership Housing		Rental Housing		Share of Total Units
	Affordable Price Level	Estimated Units	Affordable Rent Level	Estimated Units	
Less than \$15,000	\$0k - \$80k	68	\$0 - \$400	34	3%
\$15,000 - \$24,999	\$80k - \$130k	100	\$400 - \$700	188	8%
\$25,000 - \$34,999	\$130k - \$180k	131	\$700 - \$900	146	8%
\$35,000 - \$49,999	\$180k - \$240k	384	\$900 - \$1200	128	14%
\$50,000 - \$74,999	\$240k - \$320k	733	\$1200 - \$1600	352	30%
\$75,000 - \$99,999	\$320k - \$370k	449	\$1600 - \$1900	106	16%
\$100,000 - \$124,999	\$370k - \$440k	377	\$1900 - \$2200	66	12%
\$125,000 - \$149,999	\$440k - \$510k	144	\$2200 - \$2500	46	5%
\$150,000 - \$199,999	\$510k - \$680k	54	\$2500 - \$3400	36	3%
\$200,000+	\$680k +	35	\$3400 +	1	1%
	69%	2,476	31%	1,102	

Sources: US Census, PSU Population Research Center, JOHNSON ECONOMICS
 Census Tables: B25004, B25032, B25063, B25075 (2020 ACS 5-yr Estimates)

- Most housing in Scappoose is found in price and rent levels affordable to those earning at least \$50,000 per year. Thirty-three percent of housing is estimated to be affordable to those earning less than this.

COMPARISON OF CURRENT HOUSING DEMAND WITH CURRENT SUPPLY

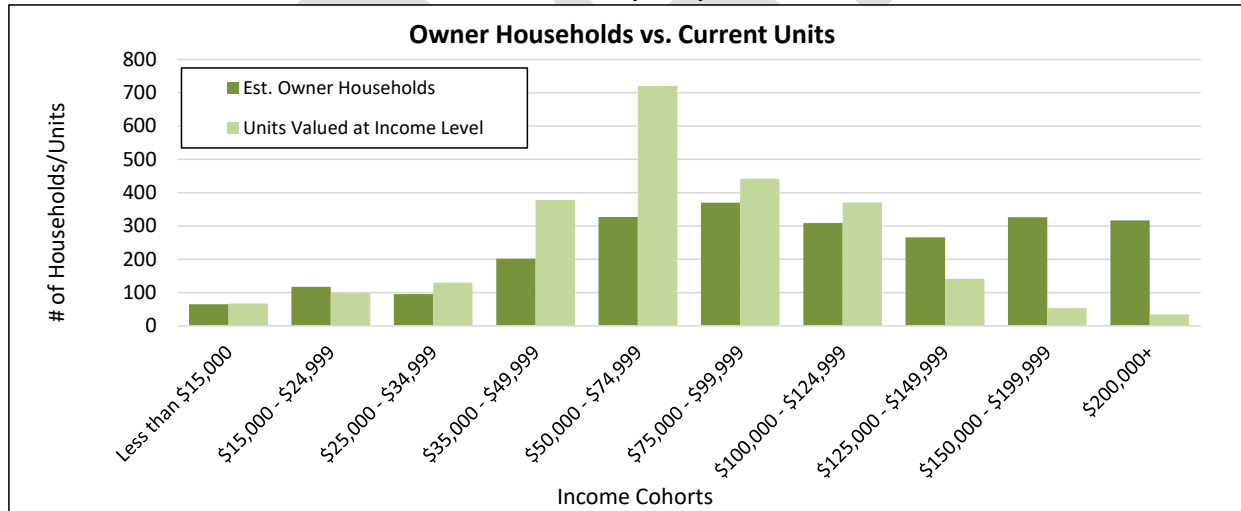
A comparison of estimated current housing *demand* with the existing *supply* identifies the existing discrepancies between needs and the housing which is currently available. The estimated number of units outnumbers the number of households by roughly 120 units, indicating an average vacancy rate of 3%.

In general, this identifies that the lower and middle portion of the market is generally well supplied for ownership households. There is a finding that upper income households in Scappoose could perhaps support some more expensive housing supply, though the large amount of new housing built in recent years is filling this niche. The largest supply is found around the middle price points, near the median home price, while income is more broadly distributed.

According to online property listings and Census estimates, the current market rates for most rental units are in the \$900 to \$1,600/month range, depending on unit size. There is still a cluster of rental housing in the community that is lower cost to the current tenants. These units are likely held by long-term tenants and would become more expensive if they were re-tenanted. There is support for more rental housing appropriate for lower-to-middle income households earning less than \$50,000 per year. Rentals at the most expensive levels generally represent single family homes for rent.

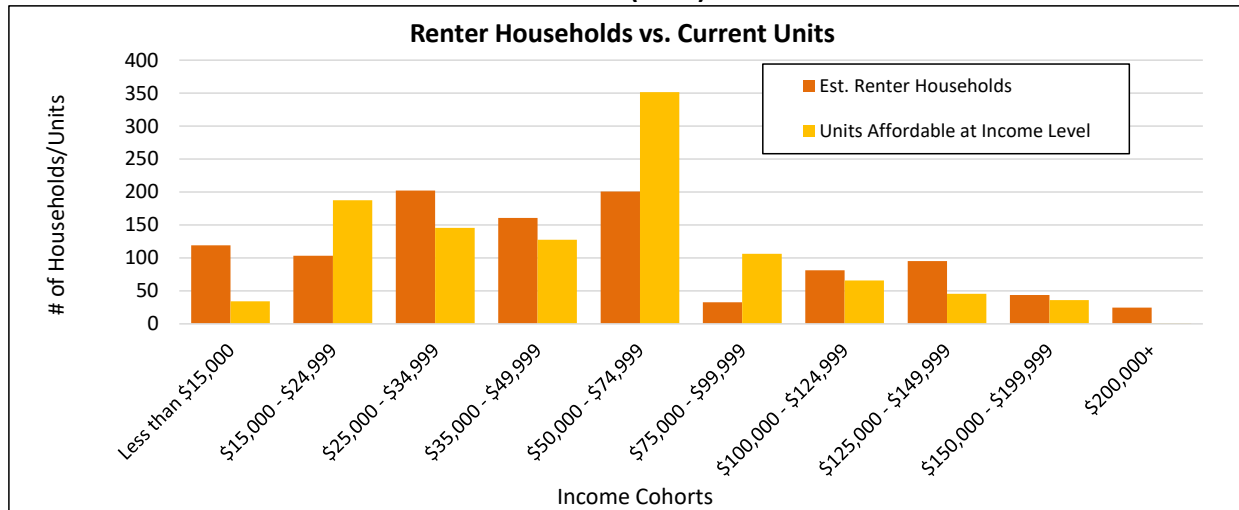
Figures 4.5 and 4.6 present this information in chart form, comparing the estimated number of households in given income ranges, and the supply of units currently valued (ownership) or priced (rentals) within those income ranges. The data is presented for owner and renter households. (These figures present an estimate of current housing costs for current households. Some households may have a home price or rent that is tied to an earlier, lower-cost period. However, these same units, if relisted for sale or rent would likely have their cost set to market, and therefore be more expensive.)

FIGURE 4.5: COMPARISON OF OWNER HOUSEHOLD INCOME GROUPS TO ESTIMATED SUPPLY AFFORDABLE AT THOSE INCOME LEVELS (2023)



Sources: PSU Population Research Center, City of Scappoose, Census, JOHNSON ECONOMICS

FIGURE 4.6: COMPARISON OF RENTER HOUSEHOLD INCOME GROUPS TO ESTIMATED SUPPLY AFFORDABLE AT THOSE INCOME LEVELS (2023)



Sources: PSU Population Research Center, City of Scappoose, Census, JOHNSON ECONOMICS

The home value and rent segments which show a “surplus” in Figures 4.5 and 4.6 illustrate where current property values and rent levels are in Scappoose. Housing prices and rent levels will tend to congregate around those market levels. These levels will be too costly for some (i.e., require more than 30% in gross income) or “too affordable” for others (i.e. they have income levels that indicate they could afford more expensive housing if it were available and they had the preference).

In general, these findings demonstrate that there are few excess lower-value housing opportunities for many owner households, though the supply is fairly well matched with the current demand. This may include more attached types of units such as townhomes, or smaller units such as condos or cottage clusters. There is also potential support for some more expensive types of ownership housing. There may be support for more modern rental units aimed at lower-income households. (Housing need at specific income levels is discussed in more detail in Section V.)

HOME SALE PRICES

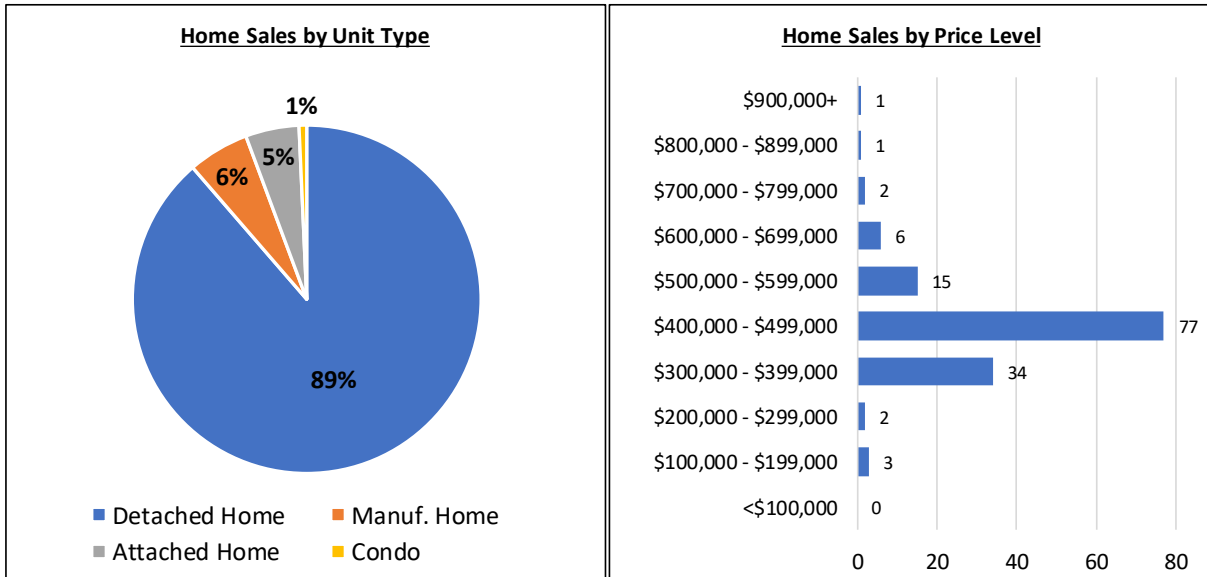
It is important to note that the figures presented in the prior section represent estimates of current *property value or current housing cost to the owner*, not the current market pricing of homes for sale in the city. For instance, a household living in a manufactured home that has been paid off over many years may have relatively low housing costs. This indicates that one owner household is living in a “lower value” unit. It does **not** indicate that units at this price point are available on the current market.

If this hypothetical household were to sell their home, it would sell at a higher price reflecting inflation and current achievable market prices. For this reason, many of the lower value or lower rent units found in the previous section will actually become higher-priced units when they are sold or become vacant.

For reference, this section presents home sales data from 2021 to indicate housing costs for new entrants into the market (Figure 4.7).

- The median sale price was \$435,000.
- The average (mean) sale price was a similar \$442,000.
- The average price per square foot was \$261/s.f.
- The median square footage was 1,685 s.f.

FIGURE 4.7: SCAPPOOSE HOME SALES (12 MONTHS)



Sources: RMLS, JOHNSON ECONOMICS

- 24% of sales were priced between \$300,000 and \$399,000.
- 55% of sales were priced between \$400,000 and \$499,000.
- 18% of sales were priced at \$500,000 or more.
- Only 4% of sales were priced below \$300,000.

Affordability: As indicated, 79% of recent sales in Scappoose took place within the \$300,000 to \$500,000 price range. Homes in this range should be mostly affordable to households earning between roughly \$70,000 and \$150,000. An estimated 35% of local households fall within these income segments.

Roughly 44% of households earn less than \$70,000 per year, meaning that the bulk of housing supply on the current for-sale market is likely too expensive for most of these households.

The findings of current need form the foundation for projected future housing need, presented in the following section. The 20-year projections of housing need are meant to achieve a healthy mix of unit types and affordability levels for all residents in 2043, including meeting the needs of current residents who may not be in optimal housing situations. Therefore, the total projected housing needs are inclusive of new and current households, while reflecting that the current housing inventory must serve as the starting point.

V. FUTURE HOUSING NEEDS - 2043 (CITY OF SCAPPOOSE UGB)

The projected future (20-year) housing profile (Figure 5.1) in the UGB study area is based on the current housing profile (2023), multiplied by an assumed projected future household growth rate. The projected future growth is the forecasted 2043 population for the City of Scappoose UGB included in the most recent forecast from the PSU Population Forecast program (completed 2020). This forecast estimates that the Scappoose population will grow at a rate of 1.0% annually between 2023 and 2043. (This 1.0% annual growth rate would be slower than the annual rate experienced since 2010, which is was 2% according to the Census.)

FIGURE 5.1: FUTURE HOUSING PROFILE (2043)

PROJECTED FUTURE HOUSING CONDITIONS (2023 - 2043)		SOURCE
2023 Population (Minus Group Pop.)	8,748	PSU
Projected Annual Growth Rate	1.0%	PSU Forecast Program
2043 Population (Minus Group Pop.)	10,708	(Total 2043 Population - Group Housing Pop.)
Estimated group housing population:	56	Share of total pop. (0.5%)
Total Estimated 2043 Population:	10,764	
Estimated Non-Group 2043 Households:	4,388	(2043 Non-Group Pop./Avg. Household Size)
New Households 2023 to 2043	930	
Avg. Household Size:	2.44	Projected household size
Total Housing Units:	4,619	Occupied Units plus Vacant
Occupied Housing Units:	4,388	(= Number of Non-Group Households)
Vacant Housing Units:	231	(= Total Units - Occupied Units)
Projected Market Vacancy Rate:	5.0%	(Vacant Units/ Total Units)

Sources: PSU Population Research Center, Census, JOHNSON ECONOMICS LLC

*Projections are applied to estimates of 2021 population, household and housing units shown in Figure 2.1

The model projects growth in the number of non-group households over 20 years of roughly 930 households, with accompanying population growth of 1,970 new residents. (The number of households differs from the number of housing units, because the total number of housing units includes a percentage of vacancy. Projected housing unit needs are discussed below.)

PROJECTION OF FUTURE HOUSING UNIT DEMAND (2043)

The profile of future housing demand was derived using the same methodology used to produce the estimate of current housing need. This estimate includes current and future households *but does not include a vacancy assumption. The vacancy assumption is added in the subsequent step.* Therefore, the need identified below is the total need for actual households in occupied units (4,388).

The analysis considered the propensity of households at specific age and income levels to either rent or own their home, in order to derive the future need for ownership and rental housing units, and the affordable cost level of each. The projected need is for *all* 2043 households and therefore includes the needs of current households.

The price levels presented here use the same assumptions regarding the amount of gross income applied to housing costs, from 30% for low-income households down to 20% for the highest income households.

The affordable price level for ownership housing assumes 30-year amortization, at an interest rate of 5%, with 10% down payment. Because of the impossibility of predicting variables such as interest rates 20 years into the future, these assumptions were kept constant from the estimation of current housing demand. Income levels and price levels are presented in current dollars.

Figure 5.2 presents the projected occupied future housing demand (current and new households, without vacancy) in 2043.

FIGURE 5.2: PROJECTED OCCUPIED FUTURE HOUSING DEMAND (2043)

Ownership				
Price Range	# of Households	Income Range	% of Total	Cumulative
\$0k - \$80k	79	Less than \$15,000	2.6%	2.6%
\$80k - \$130k	145	\$15,000 - \$24,999	4.8%	7.4%
\$130k - \$180k	116	\$25,000 - \$34,999	3.9%	11.3%
\$180k - \$240k	249	\$35,000 - \$49,999	8.3%	19.6%
\$240k - \$320k	405	\$50,000 - \$74,999	13.5%	33.0%
\$320k - \$370k	469	\$75,000 - \$99,999	15.6%	48.6%
\$370k - \$440k	392	\$100,000 - \$124,999	13.0%	61.7%
\$440k - \$510k	337	\$125,000 - \$149,999	11.2%	72.9%
\$510k - \$680k	414	\$150,000 - \$199,999	13.8%	86.6%
\$680k +	402	\$200,000+	13.4%	100.0%
Totals:	3,008		% of All:	68.6%

Rental				
Rent Level	# of Households	Income Range	% of Total	Cumulative
\$0 - \$400	155	Less than \$15,000	11.2%	11.2%
\$400 - \$700	135	\$15,000 - \$24,999	9.8%	21.0%
\$700 - \$900	262	\$25,000 - \$34,999	19.0%	40.0%
\$900 - \$1200	211	\$35,000 - \$49,999	15.3%	55.2%
\$1200 - \$1600	265	\$50,000 - \$74,999	19.2%	74.4%
\$1600 - \$1900	41	\$75,000 - \$99,999	3.0%	77.4%
\$1900 - \$2200	103	\$100,000 - \$124,999	7.5%	84.9%
\$2200 - \$2500	121	\$125,000 - \$149,999	8.8%	93.7%
\$2500 - \$3400	56	\$150,000 - \$199,999	4.0%	97.7%
\$3400 +	32	\$200,000+	2.3%	100.0%
Totals:	1,380		% of All:	31.4%

All Units
4,388

Sources: Census, Claritas, JOHNSON ECONOMICS

The number of households across the income spectrum seeking a range of both ownership and rental housing is anticipated to grow. It is projected that the homeownership rate in Scappoose will remain stable over the next 20 years at 69%.

COMPARISON OF FUTURE HOUSING DEMAND TO CURRENT HOUSING INVENTORY

The profile of occupied future housing demand presented above (Figure 5.2) was compared to the current housing inventory presented in the previous section to determine the total future need for *new* housing units by type and price range (Figure 5.3).

This estimate includes a vacancy assumption. As reflected by the most recent Census data, and as is common in most communities, the vacancy rate for rental units is typically higher than that for ownership units. An average vacancy rate of 5% is assumed for both ownership and rental housing for the purpose of this analysis.

FIGURE 5.3: PROJECTED FUTURE NEED FOR NEW HOUSING UNITS (2043), SCAPPOOSE

OWNERSHIP HOUSING									
Unit Type:	Single Family Detached	Single Family Attached	Multi-Family			Manuf. home	Boat, RV, other temp	Total Units	% of Units
			2-unit	3- or 4-plex	5+ Units MFR				
Totals:	545	41	0	0	31	74	0	691	66.4%
Percentage:	78.8%	5.9%	0.0%	0.0%	4.5%	10.7%	0.0%	100%	

RENTAL HOUSING									
Unit Type:	Single Family Detached	Single Family Attached	Multi-Family			Manuf. home	Boat, RV, other temp	Total Units	% of Units
			2-unit	3- or 4-plex	5+ Units MFR				
Totals:	31	32	48	41	182	17	0	350	33.6%
Percentage:	8.7%	9.2%	13.8%	11.7%	51.8%	4.8%	0.0%	100%	

TOTAL HOUSING UNITS									
Unit Type:	Single Family Detached	Single Family Attached	Multi-Family			Manuf. home	Boat, RV, other temp	Total Units	% of Units
			2-unit	3- or 4-plex	5+ Units MFR				
Totals:	575	73	48	41	213	91	0	1,041	100%
Percentage:	55.2%	7.0%	4.7%	3.9%	20.4%	8.7%	0.0%	100%	

Sources: PSU, City of Scappoose, Census, Claritas, JOHNSON ECONOMICS

- The results show a need for 1,040 new housing units by 2043.
- Of the new units needed, roughly 66% are projected to be ownership units, while 34% are projected to be rental units. This represents more renters than the estimated tenure split, but it is projected that more rental units will need to be added to balance the disproportionate share of ownership units in the current inventory.
- There is some need for new ownership housing at the lower-middle portion of the pricing spectrum. But income trends suggest that the greatest demand will remain in the middle and higher price ranges (\$300k to \$600k).
- The greatest need for rental units is found at the lowest and some higher price points. Market rents are currently clustered in the \$900 to \$1,600 range in current dollars. Therefore, most units are to be found in this range. Many households will need rent levels lower than the market rate in order to maintain affordable housing costs (see more detail below).

Needed Unit Types

The mix of needed unit types shown in Figure 5.3 reflects both past trends and anticipated future trends. Since 2000, detached single family units (including manufactured and mobile homes) have continued to constitute most of the permitted units in Scappoose, with some multi-family development. In keeping with development trends,

and the buildable land available to Scappoose, single family units are expected to continue to make up a large share of new housing development over the next 20 years. However, an increasing share of new needed units is anticipated to be attached housing types to accommodate renters and first-time home buyers.

- 64% of the new units are projected to be single family detached homes or new manufactured homes, while 36% is projected to be some form of attached housing.
- Single family attached units (townhomes on individual lots) are projected to meet 7% of future need. These are defined as units on separate tax lots, attached by a wall but separately metered, the most common example being townhome units.
- Duplex, triplex, and four-plex units are projected to represent 9% of the total need. Duplex units would include a detached single-family home with an accessory dwelling unit on the same lot, or with a separate unit in the home (for instance, a rental basement unit.)
- Over 20% of all needed units are projected to be multi-family in structures of 5+ attached units.
- 9% of new needed units are projected to be manufactured home units, which meet the needs of some low-income households for both ownership and rental.
- Of ownership units, 90% are projected to be detached single-family homes or manufactured homes, and 10% are projected to be attached forms.
- About 86% of new rental units are projected to be found in new attached buildings, with 52% projected in rental properties of 5 or more units, and 35% in other attached housing forms. 14% of new rental units are projected to be detached homes, including manufactured homes.

Needed Affordability Levels

Figure 5.4 presents the estimated need for net new housing units by major income segment, based on the projected demographics of new households to the market area. The needed affordability levels presented here are based on current dollars.

Figure 5.4 also discusses the housing types typically attainable by residents at these income levels.

FIGURE 5.4: PROJECTED NEED FOR NEW HOUSING AT DIFFERENT INCOME LEVELS

Household Income Segment	Income Level (Rounded)*	Afford. Rent Range	Afford. Price Range	Owner Units	Renter Units	Total	Share	Common Housing Product	
Extremely Low Income	< 30% AMI	< \$29,000	< \$800	< \$150k	56	101	157	15%	Govt-subsidized; Voucher; Manuf. Homes
Very Low Income	30% - 50% AMI	\$29k - \$48k	\$800-\$1,100	\$150k-\$225k	61	89	150	14%	Aging rentals; Govt-subsidized; Voucher; M.H.
Low Income	50% - 80% AMI	\$48k - \$77k	\$1,100-\$1,600	\$225k-\$330k	102	84	186	18%	Market apts; Manuf. homes; Plexes; Aging SFR
Middle Income	80% - 120% AMI	\$77k - \$116k	\$1,600-\$2,100	\$330k-\$475k	163	19	182	17%	Single-family detached; Townhomes; Small homes; New apts
Upper Income	> 120% AMI	> \$116,000	\$2,100+	\$475k+	308	58	366	35%	Single-family detached
TOTAL:				691	350	1,041	100%		

Sources: HUD, Census, Claritas, JOHNSON ECONOMICS

Note that Figure 5.4 presents the official state measure of “low income” used to set rent and income limits for various affordable housing program. This estimate via OHCS and HUD are based on an estimate of median income in Columbia County that is quite high (over \$96k in 2021, based on a family of four), while this analysis estimates

that the median income in Scappoose was a lower \$86k. Because the official estimate of county median income is high, the official measure of what qualifies as “low income”, or 80% of area median income (AMI), is also quite high at \$77k per year in household income. Most households in this group and even some in the “very low income” group can be served by market-rate rental housing available at current rent levels in the community.

- Figure 5.3 presents the *net NEW* housing unit need over the next 20 years. However, there is also a *current* need for more affordable units. For all households, current and new, to pay 30% or less of their income towards housing in 2043, more affordable rental units would be required. This indicates that some of the current supply, while it shows up as existing available housing, would need to become less expensive to meet the needs of current households.
- There is a finding of some new need at the lowest end of the rental spectrum (\$700 and less).
- The projection of future ownership units finds that the supply at the lowest end of the spectrum will be insufficient due to the prevalence of newer homes, most of which are detached houses. (This reflects the estimated *value* of the total housing stock, and not necessarily the average pricing for housing currently for sale.) Ownership options and lower and middle price points are often manufactured homes, townhomes, condos, and small detached homes, often on smaller lots.
- Figure 5.5 presents estimates of need at key low-income affordability levels in 2023 and in 2043. There is existing and on-going need at these levels, based on income levels specified by OHCS for Columbia County. An estimated 47% of households qualify as at least “low income” or lower on the income scale, while 15% of household qualify as “extremely low income”. (Again, this is based on the official state measure of Columbia County median income for application to HUD and other affordable housing programs, which is relatively high.)
- Typically, only rent-subsidized properties can accommodate these extremely-low-income households at “affordable” housing cost levels. As noted above, most in the “low income” and some in the “very low income” groups can be served by market-rate rental housing at current rent levels (see Figure 5.4).
- The city is not obligated to produce appropriate housing for all of these groups but should ensure that local policy and zoning code accommodates market-rate and non-profit agencies who wish to pursue projects to meet the full spectrum of local housing needs.

FIGURE 5.5: PROJECTED NEED FOR HOUSING AFFORDABLE AT LOW INCOME LEVELS, SCAPPOOSE

Affordability Level	Income Level*		Current Need (2023)		Future Need (2043)		NEW Need (20-Year)	
			# of HH	% of All	# of HH	% of All	# of HH	% of All
Extremely Low Inc.	30% AMI	\$29,010	524	15%	682	16%	157	15%
Very Low Income	50% AMI	\$48,350	1,025	30%	1,333	30%	308	30%
Low Income	80% AMI	\$77,360	1,631	47%	2,124	48%	493	47%

Sources: OHCS, Claritas, JOHNSON ECONOMICS

* Income levels are based on OHCS guidelines for a family of four.

Agricultural Worker Housing

There is currently one property of 22 units meant for agricultural workers in Scappoose. Based on the assumption that this type of housing will maintain its current representation in the local housing stock, this indicates that there will be need for about 6 additional housing units dedicated specifically for agricultural workers over the planning period. However, this population may also be served by other available affordable units, and new market rate units.

VI. ALTERNATE PROJECTION - 2043 (CITY OF SCAPPOOSE UGB)

The projected growth and housing need presented in the prior sections conforms to the statutory approach to completing a Goal 10 needs analysis. To comply with state rules, the analysis relies on estimates of current population and projections of future population from the Portland State University Population Research Center (PRC).

In completing this analysis, Johnson Economics finds complications created by the release of a new population estimate from the 2020 Decennial Census that differs from the PRC analysis completed prior to having that figure available. For understandable reasons, the estimates of the PRC and Census can diverge between the Decennial Census, which serves as an opportunity to recalibrate the estimates every decade. In this case, the Census estimate for 2020 was higher by 650 people than the PSU estimate for 2020 (within city limits), a difference of roughly 9%:

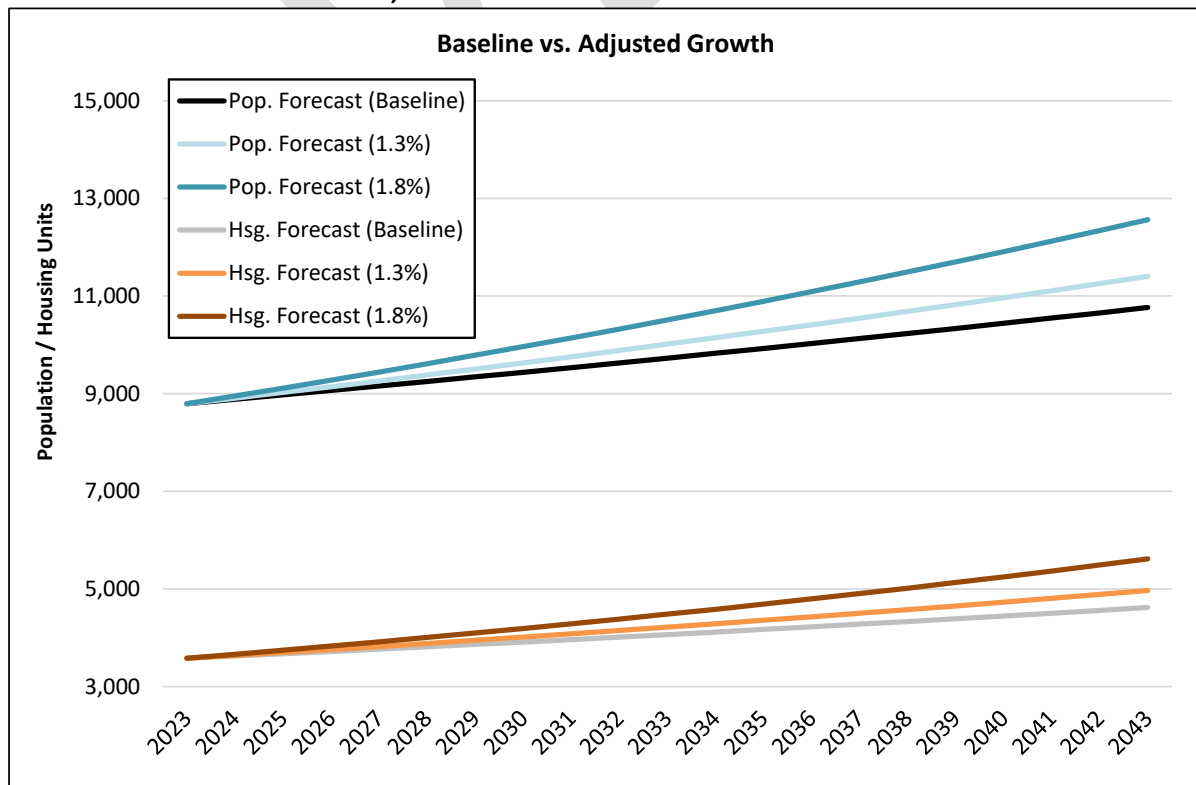
- 2020 Census: 8,010 population (within city limits, not UGB)
- PSU PRC: 7,360 population (within city limits, not UGB)

The impact of this discrepancy is that PSU’s forecasted annual growth rate between 2020 and 2045 of 1.3% diminishes to 1% when the current population is recalibrated higher. Meanwhile, the actual achieved growth rate between 2010 and 2020 according to the Census was an even higher 2.0%.

For the sake of comparison with the statutory baseline growth forecast presented in this report, Johnson Economics prepared an alternative growth forecast using two adjusted growth rates: The 1.3% rate originally forecast by PSU, and the 1.8% growth rate projected in the prior HNA, which represents a somewhat moderated version of the 2010-2020 rate. The results of the baseline forecast, and two potential alternate forecasts are presented below.

These forecasts adopt the estimated 2023 estimates of population and housing units *within the UGB* as their starting point.

**FIGURE 6.1: PROJECTED POPULATION AND HOUSING UNITS (2043)
BASELINE AND ADJUSTED FORECASTS, SCAPPOOSE UGB**



Sources: PSU, Census, City of Scappoose, JOHNSON ECONOMICS

Figure 6.2 presents the data displayed in the prior chart in five-year increments. The three forecasts present a range of potential growth that may be achieved in Scappoose. Actual growth rates should be tracked to ensure that the population and growth forecasts from the PSU program keep pace with observed housing production and population growth on the ground. The alternate forecasts presented here are for reference and internal planning purposes only and do not impact the official projection required in this HNA.

The alternative forecasts project a 20-year population growth of roughly 2,600 to 3,800 people and need for 1,400 to over 2,000 new housing units. Over 20 years, the two alternate forecasts would represent an increase in growth of 32% and 91% over the baseline estimate respectively.

**FIGURE 6.2: PROJECTED POPULATION AND HOUSING UNITS (2043), 5-YEAR INCREMENTS
BASELINE AND ADJUSTED FORECASTS, SCAPPOOSE**

Year	Baseline Forecast (1.0%)		Alternate Forecast (1.3%)		Alternate Forecast (1.8%)	
	Pop. Forecast	Hsg. Forecast	Pop. Forecast	Hsg. Forecast	Pop. Forecast	Hsg. Forecast
2023	8,794	3,578	8,794	3,578	8,794	3,578
2028	9,249	3,814	9,384	3,884	9,614	4,004
2033	9,729	4,065	10,013	4,216	10,511	4,482
2038	10,233	4,334	10,685	4,576	11,492	5,016
2043	10,764	4,619	11,402	4,968	12,564	5,614
<i>20-Year Growth</i>	<i>1,970</i>	<i>1,041</i>	<i>2,609</i>	<i>1,390</i>	<i>3,770</i>	<i>2,036</i>

Sources: PSU, City of Scappoose, Census, Environics Analytics, JOHNSON ECONOMICS



MEMORANDUM

Scappoose Buildable Lands Inventory – Methodology and Results [Draft]

City of Scappoose

DATE April 8, 2022
TO 50-year Plan Stakeholder Advisory Committee
FROM Clinton “CJ” Doxsee, Darci Rudzinski, MIG | APG
CC Mari Valencia-Aguilar, DLCD
Brendan Buckley, Johnson Economics

INTRODUCTION

The purpose of this memorandum is to describe the methodology and data sources for the City of Scappoose Residential Buildable Lands Inventory (BLI) and the results of the inventory. This BLI is a component of the Scappoose Housing Needs Analysis (HNA) project,¹ and the results will inform the Residential Land Needs Analysis (RLNA). It is part of the work that will culminate in a new Housing Needs Analysis (HNA), with a planning horizon that aligns with the Economic Opportunities Analysis (EOA) update that is currently underway. Combined, these projects will allow the City to take a comprehensive look at needed land supply for both housing and employment, in conformance with Statewide Planning Goal 10, Housing, and Goal 9, Economic Development.

The BLI addresses land within the Scappoose Urban Growth Boundary (UGB), as shown in Figure 1, and has followed these steps:

- **Step 1: Identify Constraints.** Constraints include floodplains, wetlands, steep slopes, and other environmental conditions that would limit or preclude the development of housing. Additional information on the types of constraints is provided later in this memo.
- **Step 2: Classification of Land.** Each tax lot within the Scappoose UGB is classified based on the City’s residential and commercial comprehensive plan designations or zoning. The BLI for this project is confined to those properties that allow for residential development.
- **Step 3: Assign Development Status.** Each tax lot within the Scappoose UGB is given a “development status.” These development statuses are based on assessor’s data, aerial photography, and staff input. Each development status type is defined later in the memo.

¹ The Scappoose HNA is being funded through a Department of Land Conservation and Development (DLCD) grant

- **Step 4: Determine Developable Acreage.** Tax lots with a vacant or partially vacant status are assumed to have an amount of developable acreage based on their size, existing uses, and any development constraints on the property identified in Step 1.
- **Step 5: Determine Development Capacity.** For land categorized as residential, APG has identified development capacity in number of housing units based on the developable acreage of a parcel and a review of the City’s comprehensive plan and zoning regulations.

The remainder of this memorandum discusses these steps and initial results in greater detail.

LEGAL FRAMEWORK

This memorandum draws on requirements related to analyzing buildable lands for UGB expansions in jurisdictions throughout Oregon. Relevant to this analysis are provisions under OAR 660 Division 24, Urban Growth Boundaries (Section -0050 Land Inventory and Response to Deficiency); and Division 38 (Simplified Urban Growth Boundary Method).

This regulatory framework provides the following guidance for assessment of buildable lands:

- Physical constraints on the developability of land include floodways and water bodies; land with greater than 25% slopes; and lands subject to Goal 5 (Natural Resources, Scenic and Historic Areas, and Open Spaces), Goal 6 (Air, Water, and Land Resources Quality), and Goal 7 (Areas Subject to Natural Disasters and Hazards).
- Land should be categorized as vacant, partially vacant, or developed.
- A BLI must consider lands for public facilities such as roads, stormwater facilities, schools, etc. Publicly owned land is not generally considered available for development.
- State law stipulates that land is generally considered suitable and available unless it:
 - a) is severely constrained by natural hazards as determined under Statewide Planning Goal 7
 - b) is subject to natural resource protection measures determined under Statewide Planning Goals 5 or 6
 - c) has slopes of 25% or greater
 - d) is within the 100-year flood plain, or
 - e) cannot be provided with public facilities.

Figure 1 shows the project study area, which includes all land within the Scappoose UGB. Figure 2 shows Scappoose Comprehensive Plan land use designations for all areas within the UGB. Figure 3 shows current zoning for land inside city limits.

FIGURE 1. STUDY AREA

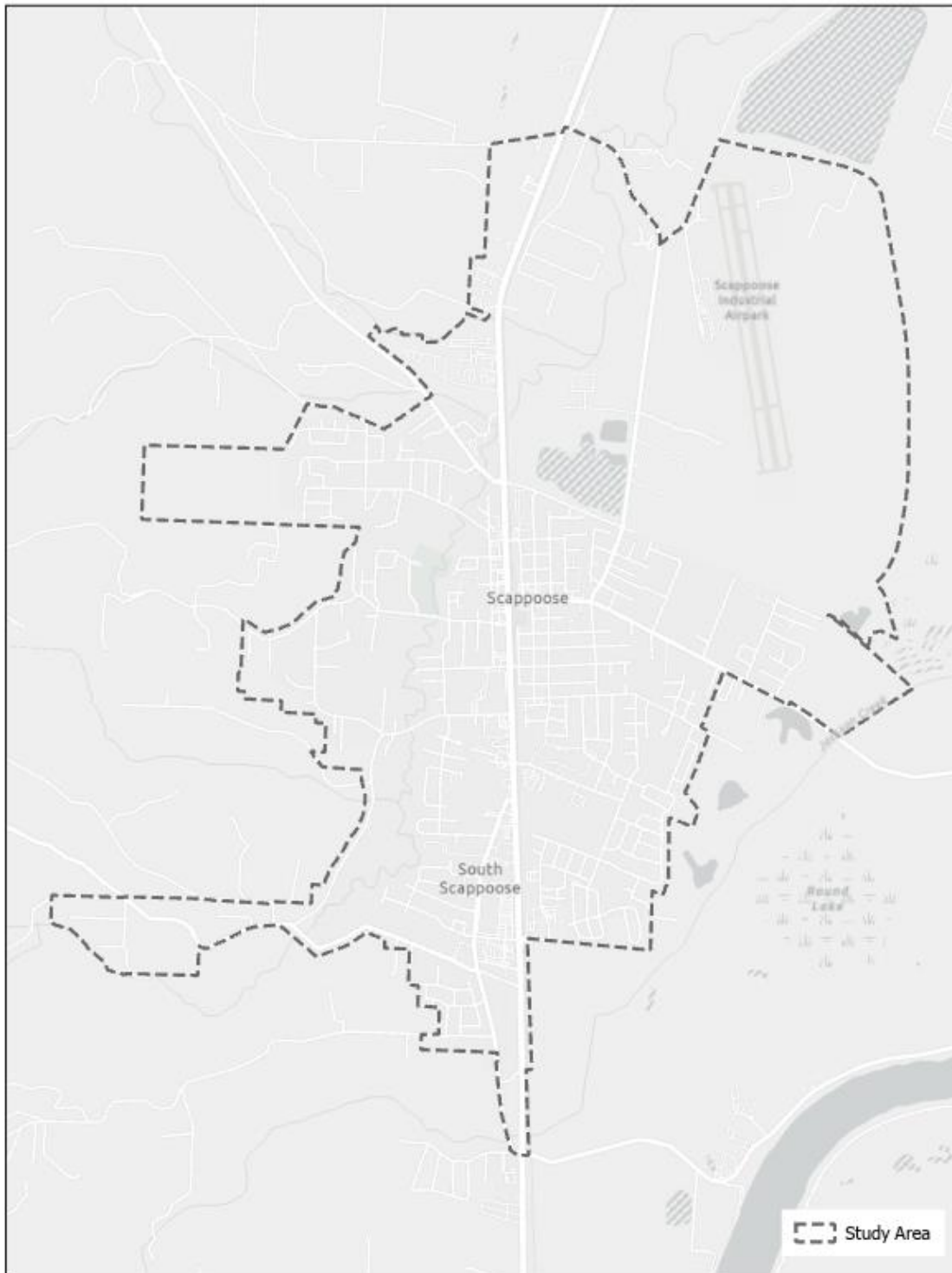


FIGURE 2. SCAPPOOSE COMPREHENSIVE PLAN DESIGNATIONS

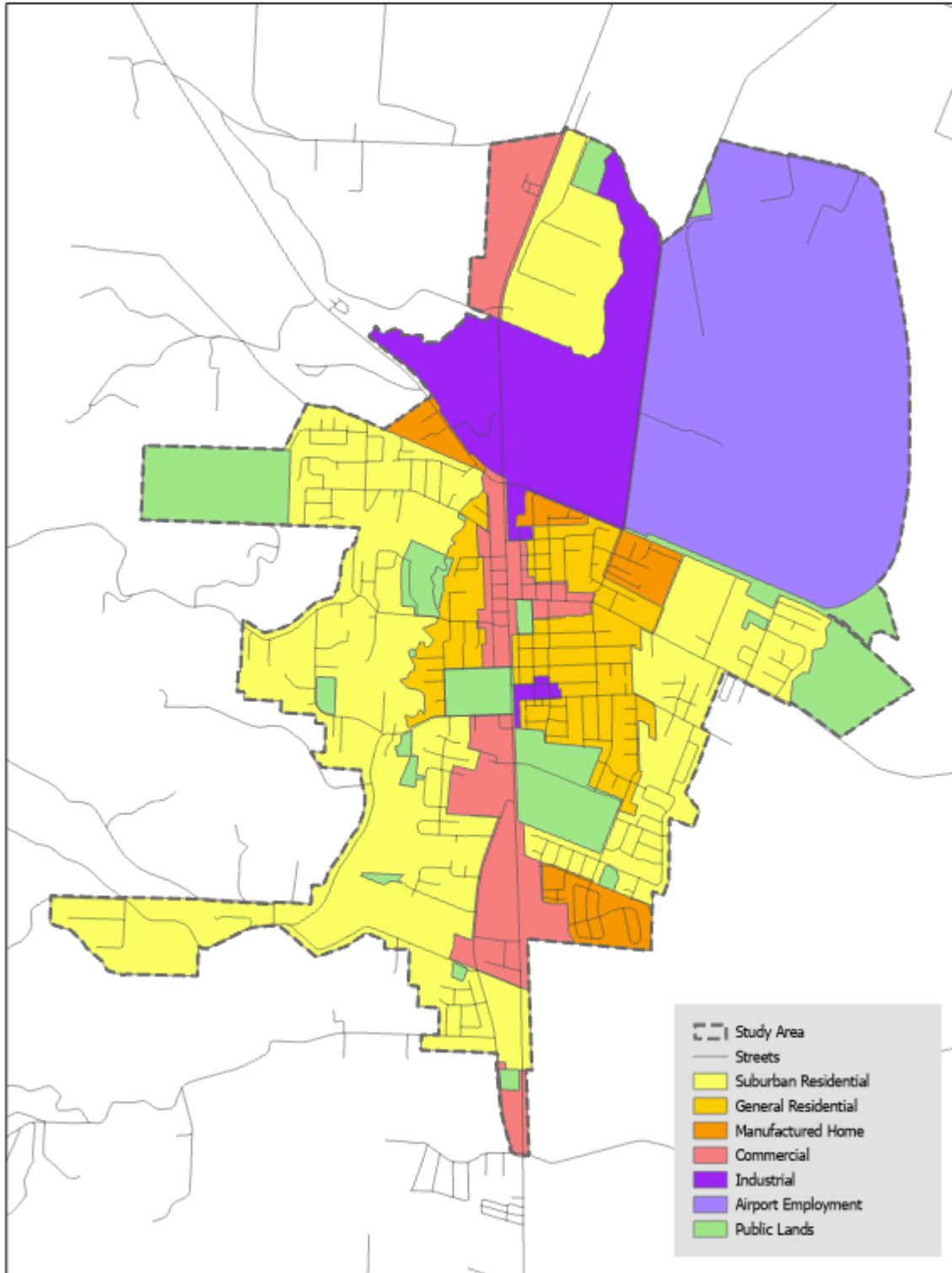
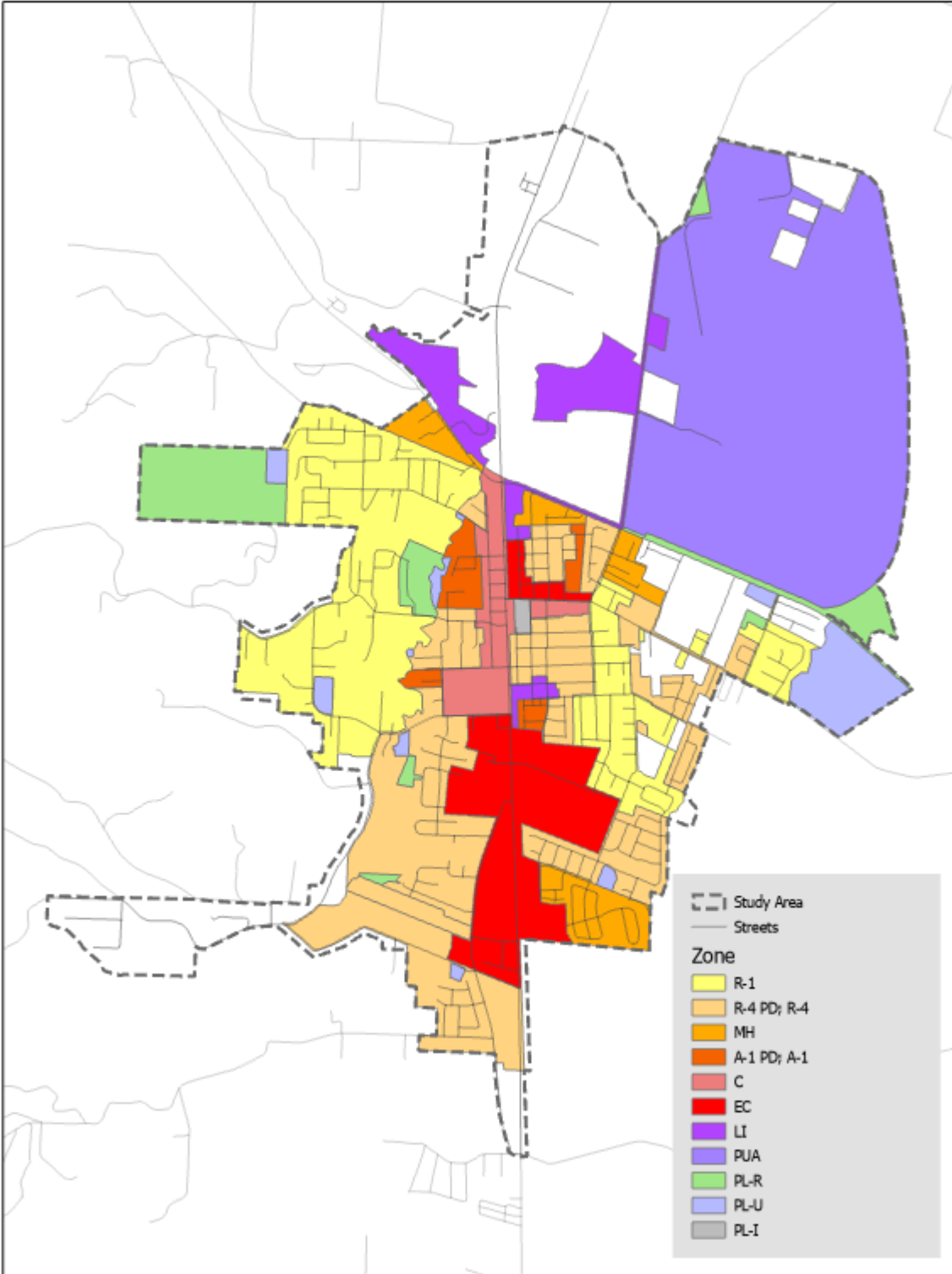


FIGURE 3. SCAPPOOSE ZONING



STEP 1 - CONSTRAINTS

Development constraints are factors that temporarily or permanently limit the development of residential housing. Development constraints include, but are not limited to, wetlands, environmentally sensitive areas such as habitat, slope, topography, infrastructure deficiencies, parcel fragmentation, or natural hazard areas. The first step of the BLI process addresses land constrained by natural resources. Subsequent steps in the BLI removes the constrained acreage from the total area within each tax lot.

NATURAL RESOURCE CONSTRAINTS

Natural resources typically provide beneficial environmental functions or aesthetic enhancements that are necessary and valuable to preserve. The preservation of these resources often provides a constraint on the developability of an area. To reflect this, environmental resources are identified in this step and removed in subsequent steps.

The following natural resource constraints are assumed to be entirely unbuildable and removed fully.

- Steep areas with slopes greater 25%.
- Wetlands from the City’s Local Wetlands Inventory (1998) and the Oregon Wetlands Database (2019).
- Streams and canals, with a 50-foot buffer applied
- Landslide susceptibility, including areas that are categorized as high or very high risk.
- FEMA Floodplain Hazards, including regulatory floodways and 100-year flood hazard areas.

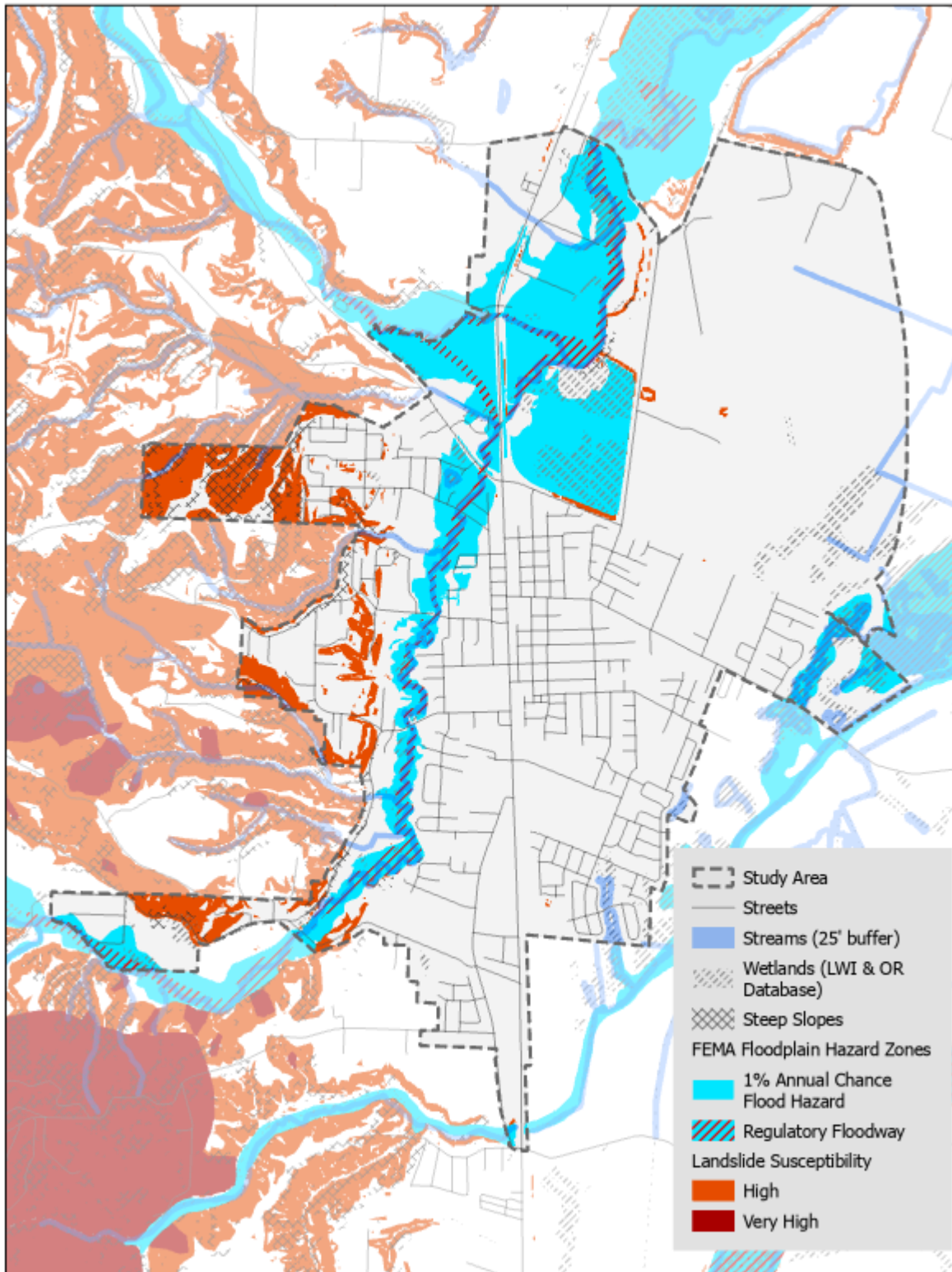
Note that any given piece of land can have multiple, overlapping constraints. Examples of this include areas that are designated wetland and also have a stream buffer area. These constrained areas are combined and then overlaid with City tax lots to estimate the amount of land in each parcel where development is limited. Constraints are shown on Figure 4.

Table 1 summarizes the acreage for each constraint.

TABLE 1: ENVIRONMENTAL CONSTRAINT SUMMARY

Constraint	Total (acres)
Steep Slopes	64.67
Wetlands	258.91
Streams and Canals	128.75
Landslide Susceptibility	178.94
Flood Hazards	436.17

FIGURE 4. CONSTRAINTS MAP



STEP 2 - CLASSIFICATION OF LAND

For the purpose of this analysis, residential land is identified as the following:

- Lands identified as a residential or commercial zone in the City’s Zoning Code. These include:
 - Residential
 - R-1 – Low Density Residential
 - R-4 – Moderate Density Residential
 - MH – Manufactured Housing
 - A-1 – High Density Residential
 - Commercial²
 - C – General Commercial
 - EC – Expanded Commercial
- Lands with Comprehensive Plan designations that allow housing were considered for outside city limits and inside the UGB. These include:
 - Residential
 - SR – Suburban Residential
 - GR – General Residential³
 - MH – Manufactured Housing
 - Commercial
 - C – Commercial

Table 2 summarizes the amount of residentially and commercially zoned or designated land that is constrained. There is a total of 1,290 acres of land within the City’s UGB that allows some form of residential development.

Scappoose has approximately 939 acres of land zoned for residential uses within City boundaries. There is an additional 351 acres designated for residential uses located outside the City boundary, but within the City’s Urban Growth Boundary (UGB). Inside the City limits, nearly one-third is zoned as Low-Density Residential (R-1) and another third is zoned for Moderate-Density Residential (R-4). The Manufactured Housing (MH) zone comprises approximately eight percent of land within City limits. Similarly, land zoned High Density Residential (A-1) comprises approximately five percent of land within City limits. Combined, the General Commercial (C) and Expanded Commercial (EC) zone consists of nearly 119 acres, representing over ten percent of land that permits residential development in the City.

Lands outside of City limits but within the UGB do not have current zoning until such time the areas are annexed. Until that time, the City’s Comprehensive Plan applies a designation with which zoning, once applied, will need to be consistent with. Comprehensive Plan designations that allow

² In the C and EC zones, multifamily buildings are permitted outright when located outside of the Scappoose Creek Floodplain

³ Note, none of the areas outside of City limits but within the UGB have a General Residential (GR) Comprehensive Plan designation

residential development include Suburban Residential (SR), Manufactured Housing (MH), and Commercial (C). Most of the land available for residential uses outside of the City but within the UGB is designated SR (80%), followed by C (15%) and MH (2%). Although the GR designation can be applied to areas outside of City limits, there are currently no GR designated areas.

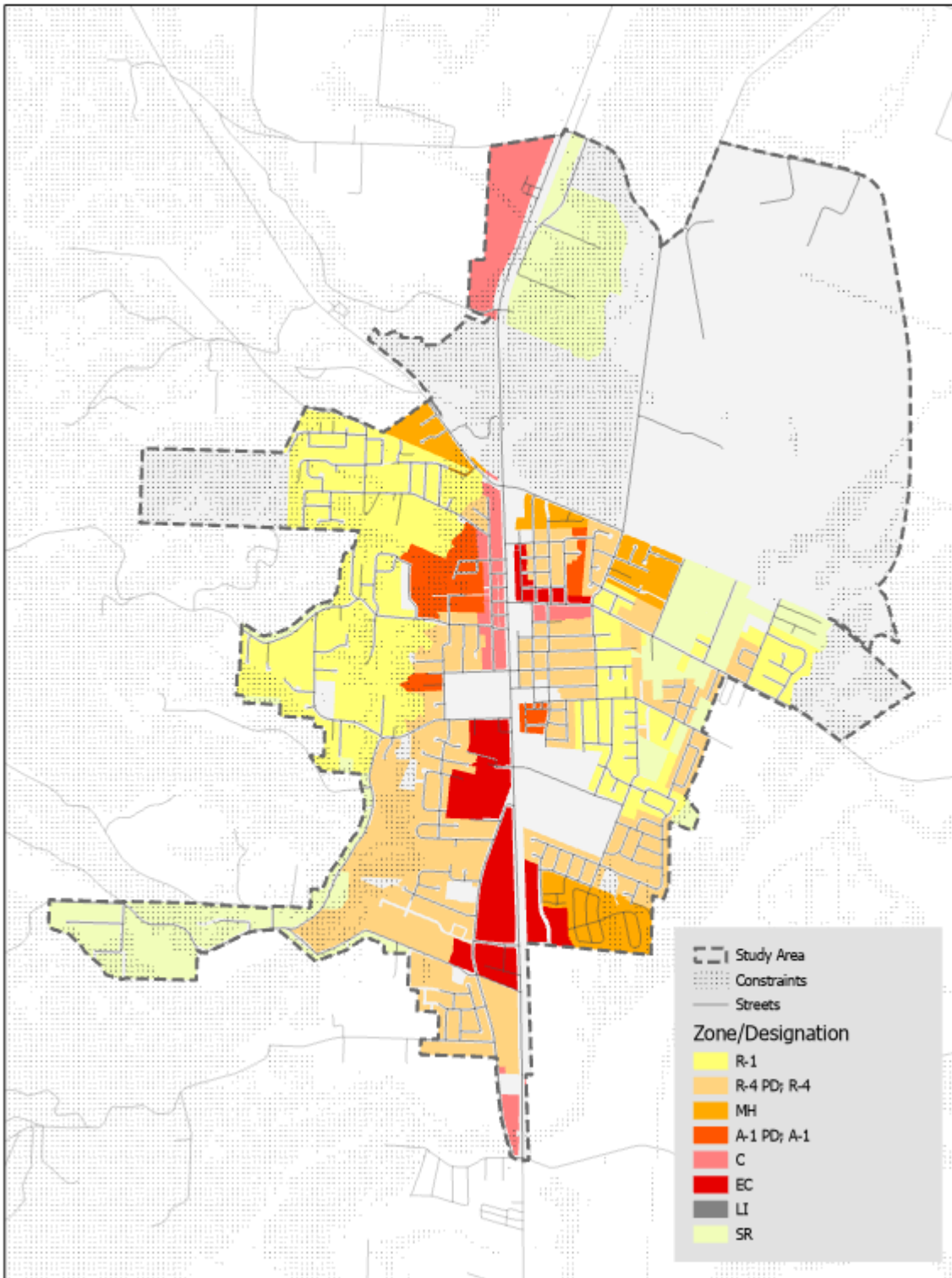
TABLE 2: GROSS ACREAGE IN RESIDENTIAL LAND INVENTORY

Zone/Comp Plan	Constrained (acres)	Unconstrained (acres)	Total (acres)
<i>City Limits (Zoning)</i>	<i>185.73</i>	<i>753.26</i>	<i>939.00</i>
R-1	96.33	250.95	347.29
R-4	52.35	284.94	337.29
R-4 PD	2.98	9.17	12.14
A-1	21.14	21.97	43.11
A-1 PD	0.00	4.35	4.35
MH	10.52	64.56	75.07
C	2.31	24.06	26.36
EC	0.11	92.85	92.96
LI*	0.00	0.42	0.42
<i>UGB Area (Comp Plan)</i>	<i>143.84</i>	<i>208.07</i>	<i>351.91</i>
GR	0.00	0.00	0.00
SR	134.87	156.13	291.00
MH	0.00	8.63	8.63
C	8.97	43.30	52.27
Total	329.58	961.33	1,290.91

* The area zoned LI currently has a residential comprehensive plan designation, which allows zoning to be amended to a residential zone.

Residential land classifications with constraints overlaid are shown on Figure 5. As illustrated in the Figure, zones or designations that allow residential uses are primarily located in the southern half of the City. A relatively smaller area is separated from the rest in the north by industrial zoned or designated areas. All the residential areas are oriented around US 30, which runs north/south through the City. Generally, the areas that permit the highest residential densities are located closest to the highway and gradually decrease the further away from the highway they get. With few exceptions, areas adjacent and closest to US 30 are zoned as General Commercial (C) or Expanded Commercial (EC). Most areas located behind the commercial zones from the highway are High-Density Residential (A-1 and A-1 PD) and Medium-Density Residential (R-4 and R-4 PD). The lowest density areas within the City – Low-Density Residential (R-1) – are located in the central eastern and central western parts of the City, closest to City limits. There are three concentrations of land designated as Suburban Residential (SR) that are located outside of City limits, but within the UGB. These are located in the southwest corner, northern limits, and far eastern areas of the UGB.

FIGURE 5. LAND CLASSIFICATION MAP



STEP 3 - DEVELOPMENT STATUS

Each residential tax lot within the Scappoose UGB was given a “development status” of either vacant, partially vacant, committed, constrained, or developed. These designations are based on County tax assessor’s data, aerial photography, and staff input. Criteria for these categories are described below.

DEVELOPMENT STATUS FOR RESIDENTIAL TAX LOTS

- **Vacant** – Vacant tax lots have no existing development, as identified by assessor data or aerial photography. Tax lots that are identified by assessor data as vacant but are less than 5,000 square feet (unconstrained) are not categorized as vacant.
- **Partially Vacant properties** – These tax lots are greater than 1/2 acre (unconstrained) in size and have an existing single-family home.⁴ One quarter-acre is deducted from the unconstrained acreage of the tax lot to account for the existing home and any remaining unconstrained acreage is considered available for future development.
- **Committed properties** – These properties include parcels in common ownership (e.g., homeowners’ association common areas), in private and public rights-of-way, and/or designated or planned for other public facilities (e.g., schools, parks, water treatment facilities, etc.), and are assumed to be unavailable for additional residential uses.
- **Constrained** – These properties do not have capacity for additional development under current zoning regulations (even if the site is currently undeveloped). They were identified as having less than 2,000 square feet of unconstrained land.
- **Developed** – Tax lots with this designation are assumed to be fully developed and unavailable for additional uses. Any tax lot that was not previously identified as vacant, partially vacant, constrained, or committed was assumed to be developed.

Table 3 summarizes the number of tax lots within each development status category by the respective zoning or comprehensive plan designation. As shown in the table, there is an estimated 262 vacant or partially vacant tax lots within the UGB (almost 9% of all lots that allow residential development). Under a one-quarter (approximately 23%) of these lots are considered vacant with the remainder partially vacant.

Nearly four-fifths of the vacant or partially vacant lots are located within City limits. Approximately two-thirds (66%) of the developable lots are zoned/designated for low-density residential (i.e., R-1 and SR). Moderate-Density Residential comprises less than a quarter of developable lots (approximately 24%). Only 7 lots (less than 5%) are zoned/designated for high-density residential and vacant or partially vacant.⁵ Commercially zoned or designated lots make up almost 7% of land

⁴ This analysis used property class codes provided in County tax assessor GIS data to assist with identifying and categorizing partially vacant properties. Property class codes are the basis of the classification system used by the County to categorize current uses. Each lot or parcel is classified in accordance with ORS 308.215 and is based upon the highest and best use of the property. Lots or parcels that are coded as residential (100’s), tract (400’s), and farmland (500’s) that met the definition of partially vacant properties are categorized as such.

⁵ Note, one of the partially vacant lots in the A-1 zone is located entirely within the floodplain and not developable under current regulations.

available for high-density or mixed-use residential. There are minimal areas available that are zoned or designated specifically for manufactured homes⁶ and availability for new homes is largely limited to partially-developed lots.

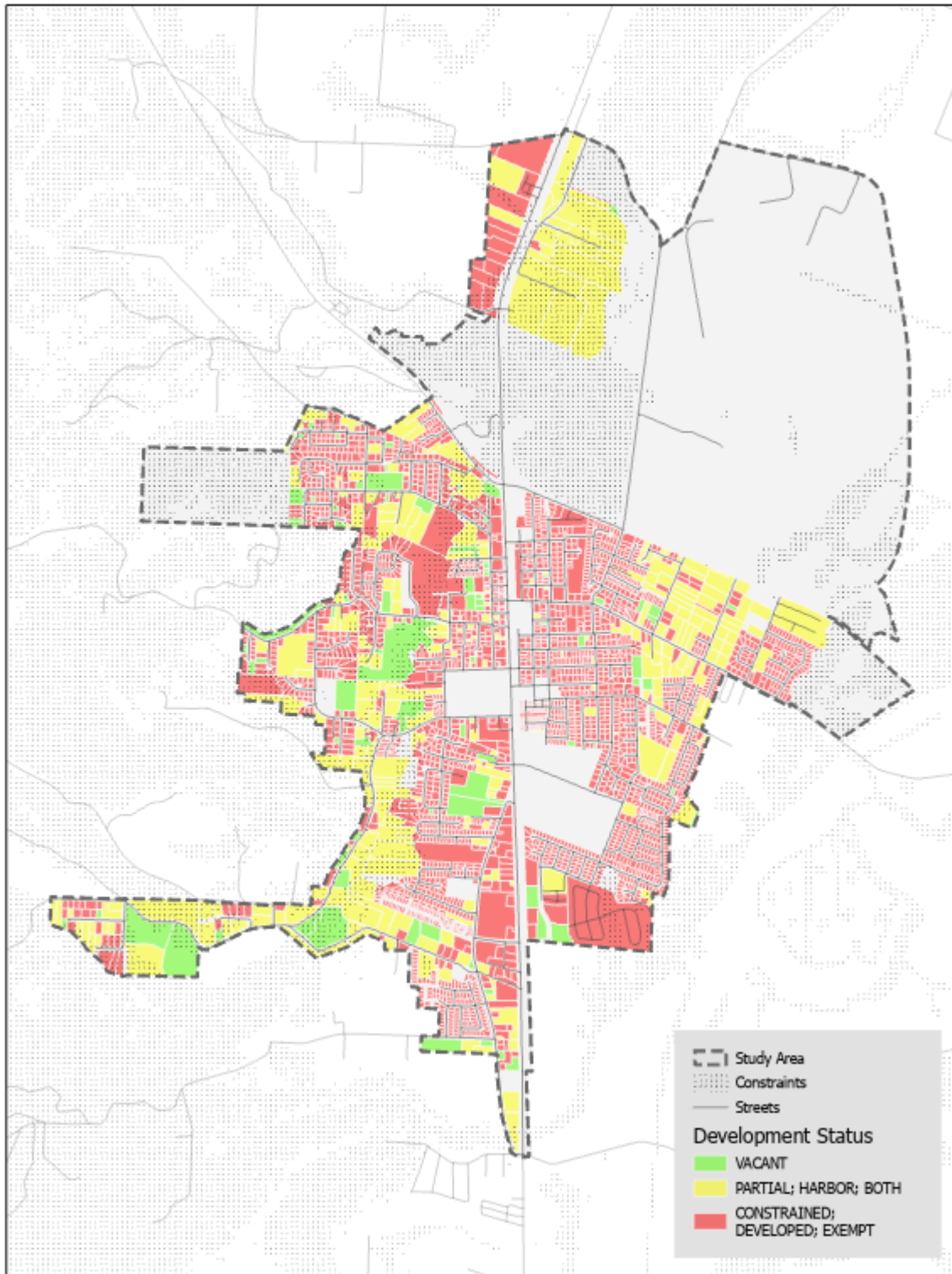
TABLE 3. TAX LOT DEVELOPMENT STATUS INSIDE CITY LIMITS AND UGB

Zoning/ Comp Plan	Vacant	Partially Vacant	Committed	Constrained	Developed	Grand Total
<i>City Limits</i>						
<i>(Zoning)</i>	52	104	56	34	2,524	2,770
R-1	18	48	16	4	829	915
R-4	20	41	13	15	1,209	1,298
R-4 PD		1		1	94	96
A-1	5	2	1		46	54
A-1 PD			1	9	54	64
MH		7	4	1	132	144
C	3	1	9		78	92
EC	6	4	11	3	82	106
LI			1			1
<i>UGB Area</i>						
<i>(Comp Plan)</i>	9	97	4	2	104	216
SR	9	90	1	1	70	171
MH		3		1	20	24
C		4	3		14	21
Grand Total	61	201	60	36	2,628	2,986

Figure 6 illustrates the location and development status of tax lots within the City's UGB.

⁶ Note manufactured homes can be built on any lot zoned R-1, R-4, or MH.

FIGURE 6. DEVELOPMENT STATUS



STEP 4 - DETERMINE DEVELOPMENT CAPACITY

The capacity of developable residential land is estimated based on the City’s Comprehensive Plan designations and zoning provisions in the Scappoose Development Code. Buildable land is the unconstrained acreage minus the assumed future right-of-way (ROW) dedication (e.g. streets) to accommodate dwelling units. The following sliding scale explains how ROW dedication was removed from available (unconstrained) acreage based on the size of the tax lot:

- Tax lots under 3/8 acre, assume 0% set aside for future streets.
- Tax lots between 3/8 acre and 1 acre, assume a 10% set aside for future streets.
- Tax lots greater than an acre, assume an 18.5% set aside for future streets.

Assumed densities for each zone were determined by the minimum lot sizes, as shown in Table 4:

TABLE 4: RESIDENTIAL AREAS, MINIMUM LOT SIZE, AND DENSITY ASSUMPTION

Zoning/ Comp Plan	Minimum Lot Size(s) (square feet)	Density Assumption (Dwelling Units/Acre)
<i>City Limits (Zoning)</i>		
R-1	SFR – 6,000 Duplex – 10,000	5 DU/acre
R-4	SFR – 5,000 Duplex – 7,000 MF – 7,000+*	6 DU/acre
A-1	Duplex – 5,000 MF – 5,000*	8 DU/acre
MH	SFR – 5,000 Duplex – 7,000 MF – 7,000*	8 DU/acre
C**	MF – no minimum	15 DU/acre
EC**	MF – no minimum	15 DU/acre
<i>UGB Area (Comp Plan)</i>		
GR & SR	SFR – 6,000 Duplex – 10,000	5 DU/acre
MH	SFR – 5,000 Duplex – 7,000 MF – 7,000*	8 DU/acre
C**	MF – no minimum	15 DU/acre

* Minimum lots size for first two units, 2,000 square feet required for each additional unit.

** Development in the C and EC zones allows residential and commercial uses. As such, 40% of a commercial lot is assumed to develop with a residential use.

The housing capacity was estimated by multiplying the assumed density by the estimated buildable acreage for each zone; estimates were rounded down to the nearest whole number.⁷ This approach assumes that every vacant parcel can accommodate at least one unit. The buildable acreage is shown in Table 5, and the estimated housing capacity and density assumptions are shown in Table 6.

TABLE 5: ESTIMATED BUILDABLE ACRES BY DEVELOPMENT STATUS AND ZONE (INCLUDING ROW DEDUCTIONS)

Zoning/ Comp Plan	Vacant	Partially Vacant	Grand Total
<i>City Limits (Zoning)</i>	<i>49.77</i>	<i>87.67</i>	<i>137.44</i>
R-1	18.95	37.69	56.63
R-4	14.94	36.27	51.21
R-4 PD		0.24	0.24
A-1	2.29		2.29
A-1 PD			
MH		9.41	9.41
C	0.53	0.45	0.99
EC	13.07	3.61	16.68
LI			
<i>UGB Area (Comp Plan)</i>	<i>13.48</i>	<i>93.94</i>	<i>107.42</i>
GR			
SR	13.48	81.11	94.58
MH		3.05	3.05
C		9.78	9.78
Grand Total	63.25	181.61	244.86

⁷ There was one exception, where the projection was less than one unit on a vacant lot and was “rounded up” with the assumption that this lot would be permitted to develop with one unit.

TABLE 6: HOUSING UNIT CAPACITY ESTIMATE AND DENSITY ASSUMPTIONS⁸

Zoning/ Comp Plan	Projected Density	Vacant	Partially Vacant	Grand Total
City Limits (Zoning)		258	465	723
R-1	5 DU/acre	87	169	256
R-4	6 DU/acre	76	201	277
R-4 PD	6 DU/acre		1	1
A-1	8 DU/acre	16		16
A-1 PD	8 DU/acre			
MH	8 DU/acre		72	72
C	15 DU/acre	3	2	5
EC	15 DU/acre	76	20	96
LI	5 DU/acre			
UGB Area (Comp Plan)		63	450	513
GR	5 DU/acre			
SR	5 DU/acre	63	370	433
MH	8 DU/acre		24	24
C	15 DU/acre		56	56
Grand Total		321	915	1,236

CONCLUSIONS

- The BLI methodology is based on Oregon Statutes and Rules and complies with the regulatory framework necessary to inventory land.
- The City has a variety of environmental constraints present that limit the development of housing. The most present constraints include flood hazards followed by wetlands. Other constraints include steep slopes, landslide hazards, and habitat around streams.
- The City is predominantly zoned for low or moderate density residential uses (i.e., R-1, R-4, and SR zones/designations). Zones for high density residential (A-1) and manufactured homes (MH)⁹ are also present, but only represent a small share. Commercial zones (C and EC) increase the overall potential for residential development due to allowing multifamily outright in certain circumstances.
- Just under one-fifth of all residential and commercial land in the UGB is unconstrained and vacant or partially vacant based on the BLI methodology.
- There is the potential for the City to accommodate up to 1,236 additional units based on projected dwelling unit density for each respective zone or comprehensive plan designation. Most of the potential capacity is located within City limits (723 units). Most of the potential

⁸ The minor discrepancies between some Table 6 figures are the product of multiplying the buildable acreage (Table 5) for some zones with their corresponding assumed density. This is because multiplying each zone's total buildable acreage with its assumed density does not account for rounding to the nearest whole number for each parcel, which was discussed in the Step 4 methodology.

⁹ Note other zones – R-1 and R-4 – also permit manufactured homes as a use.

capacity will come from infill or redevelopment of lots identified as partially vacant (915 units).