Evidentiary/Technical Support Items for Residential
(June 2017 Supplement)

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Envision Eugene Public Engagement Summary

The City of Eugene is well known for high-levels of public engagement. It is a City goal to provide a, “government that works openly, collaboratively, and fairly with the community,” and includes “transparent and interactive communication” as well as “public engagement that involves the community broadly.” The following summarizes the Envision Eugene public engagement efforts used to educate the public and obtain feedback on the 20-year growth planning efforts, from the visioning process through to the now proposed urban growth boundary (UGB) adoption package.

Community Vision Recommendation (2010-2012)

Planning for growth in Eugene used to be predictably two-sided. The challenge for the City of Eugene was to avoid the usual battles and create a planning process that built community by involving a broad spectrum of people in a new way. Envision Eugene’s goal was to create a vision of how Eugene would grow by focusing on collective best outcomes rather than worst fears. From 2010 through 2012, city staff and community members spent thousands of hours listening to one another and engaging in collaborative learning.

With a limited budget, the Envision Eugene Public Involvement Team comprised of city staff used a number of innovative public engagement methods:

- An innovative art class project was implemented to involve not only young people, but their parents in the city’s comprehensive planning process. Parents of young children have been historically hard to reach through typical means such as evening meetings, so the classes were devised as a way to creatively and cost-effectively involve these families through their children’s schoolwork. City staff worked with a community artist to design a project on Envision Eugene. The students were asked about what kinds of places are in a neighborhood, what places they like to go to, and what they would like their neighborhood to look like in the future. Students worked on the project over the course of a few classes, giving them the opportunity (and assignment) to take the topic home and talk to their parents about it. Both the Eugene School District and Bethel School District participated enthusiastically in the project. Student work was honored at an art show in June 2010 and on display at a Eugene First Friday ArtWalk. Over the next year the student art work was on display at public meetings, events and branch libraries, further spreading word about Envision Eugene to people throughout the community.

- The City asked consultant Bob Chadwick to help design a community building process for Eugene. After hundreds of individual listening interviews, the 60-person Community Resource Group (CRG) was convened for an initial three day workshop. Participants included diverse interests such as community leaders, council members, commissioners, neighborhood leaders, environmental and land use advocacy groups, businesses, school districts, and the immediate past Mayor. Planners from across the organization participated as well. People who had long ago written off public involvement in the planning process came to participate, and they stayed.
The group met 17 times for full day meetings, and got to know each other as people, rather than as pre-conceived labels.

The consensus-building method used by Chadwick helps people realize and articulate their worst possible outcomes of a given process. Knowing what the worst possible outcomes are allows people to work through them, so they are able to move on to articulate their best possible outcomes, and then work together toward achieving those outcomes. The CRG spent a lot of time identifying their individual worst and best possible outcomes related to all aspects of Envision Eugene, from affordable housing, to economic opportunities, to neighborhood livability. Collectively, this work became the seven pillars of Envision Eugene – a foundation on which to build the community vision.

- Not only did community members inform the creation of the vision through the Community Resource Group, but the technical analysis was also vetted by a collaborative group of staff, consultants, and community members. The “Technical Resource Group” (TRG) included community experts on growth and development; among them, representatives of land use advocacy group 1000 Friends of Oregon, the local Chamber of Commerce, the Homebuilders Association of Lane County, and Neighborhood Leaders. The TRG aimed to have diverse participation. Other core members were those with expertise in residential and economic development and trends, sustainability, and transportation, and members of local boards and commissions. Other members that participated overtime included those with interests in neighborhoods, utility services and government spending.

The TRG has met and continues to meet regularly over the past five years, volunteering hundreds of hours, to examine the assumptions and methodologies related to all Envision Eugene analysis, including demand projections, the buildable lands inventory, capacity analysis, measures to increase development and UGB expansion.

- In addition, direct outreach to targeted groups of stakeholders was an early element of the project assumptions and methodologies related to all Envision Eugene analysis, including demand projections, such as the development community, committees on housing, human rights, and accessibility, and low-income renters. These groups and others were also invited to participate in the Community Resource Group. Since CRG meetings required a heavy time commitment, multiple levels of participation were offered to allow those with limited time or resources to engage on-line, through surveys, email, phone calls, one-time meetings or existing meetings.

- Other public engagement methods used included:
  - Direct mailings to every Eugene household to announce the original visioning kick-off meetings.
  - Listening Interviews with individuals and interested groups, boards and commissions
  - Monthly E-Newsletter to (at the time) over 500 people
  - Public workshops and open houses
After implementation of the Conservation Envision schools key items over the next 7 years, Eugene City Planning Division webpage – www.envisioneugene.org – hosts details on the project process, resultant documents, and future implementation tasks. Any citizen can access technical summaries – including spreadsheets – that informed final recommendations, relevant City Council meeting videos, and continuous updates on implementation tasks.

Project staff met with anyone who asked, and with directly targeted participants in one-on-one and small group meetings to help design bigger public events. These small group meetings directly shaped how public outreach events were carried out. This type of collaboration with community members was a theme throughout the Envision Eugene process.

Envision Eugene was awarded the STAR Award for Citizen Involvement by the State Department of Land Conservation and Development’s Citizen Involvement Committee in 2011. The public participation from these efforts helped form the recommendations approved by the City Council in June 2012 regarding a proposed urban growth boundary and strategies to accommodate our needed jobs, homes, parks, and schools over the next 20 years, while balancing the seven pillars or goals of Envision Eugene.

Implementation of Vision (Post 2012)

After the 2012 direction from the City Council, the public outreach efforts focused on implementation of the key items in the 2012 recommendation in order to prepare the final UGB adoption package.

- Measures to Increase Employment.

  - Employment Zones. Two zoning code amendments were proposed and ultimately approved to reduce the need for a Commercial UGB expansion by amending the zoning code to allow for more office jobs to occur on Industrial land. These amendments are necessary as part of the city’s strategy to accommodate the city’s 20 year need for commercial jobs inside the current UGB. Specifically, the city is relying on these amendments to accommodate approximately 4,250 commercial jobs inside the UGB. Prior to the formal adoption process, Planning staff held various meetings with stakeholders in the affected areas and the Planning Commission to develop and obtain input on these new employment zoning standards (the new E-1 Campus Employment Zone and E-2 Mixed Use Employment Zone). The formal adoption process complied with
the adopted public engagement requirements such as public notices and hearings, as provided in the Eugene Code for Code Amendments with a concurrent Zone Change.

— **Brownfields Assessment Project.** The Eugene-Springfield area received a grant from the US Environmental Protection Agency to inventory and assess potential brownfield sites. This grant positions the metro area to establish a brownfields program and begin to see cleanup and re-development of key properties. In Eugene, work is focused on the downtown, west Eugene, and the Highway 99 industrial areas. Vacant or underused properties can be redeveloped into residential, commercial, industrial uses, helping to re-use land inside the existing UGB and reduce the amount of UGB expansions. The primary public engagement efforts have been targeted outreach to community organizations, direct contact with property owners, and establishing a coalition website with educational information for property owners and the general public.

- Measures to increase housing and mixed use.

— **Downtown and Mixed Use Code Amendments.** Consistent with several strategies in the Envision Eugene proposal, zoning code amendments were proposed and ultimately approved to facilitate compact urban development by changing land use regulations to better align with Envision Eugene. These amendments are also necessary as part of the city’s strategy to accommodate the city’s 20 year need for commercial and multi-family housing inside the current UGB. Specifically, these amendments are part of a package of land use efficiency strategies the city is relying on to accommodate approximately 400 commercial jobs and 1,600 multi-family homes inside the UGB by increasing the likelihood of redevelopment in the downtown, along key corridors and in core commercial areas. Prior to the formal adoption process, community stakeholders with experience and expertise in downtown and mixed use development gave feedback on the concepts and code language. These stakeholders included property owners, neighborhood advocates, developers, commercial brokers, architects, and the Chamber of Commerce. The commercial zoning code was amended to make it easier to do multi-family and compact urban development in downtown, on key transit corridors and in core commercial areas. The formal adoption process complied with the adopted public engagement requirements such as public notices and hearings, as provided in the Eugene Code for Code Amendments.

— **Residential Re-designation.** The city worked with several property owners whose land at the time was planned for medium density housing but might be more appropriate for low density residential housing, and if re-designated to low density would reduce the amount of UGB expansion needed for low density residential housing. The re-designations and associated zone changes and code amendments were proposed and ultimately approved for three areas of the city. These amendments were necessary as part of the city’s strategy to accommodate more of the city’s 20 year need for single-family housing (low density residential) inside the current UGB and all of the city’s 20
year need for multi-family housing (medium and high density residential) and commercial inside the current UGB. Specifically, the city is relying on these amendments to accommodate 631 additional low density residential homes and 10 additional acres of commercial land inside the UGB. Prior to the formal adoption process, public engagement on this project included direct property owner correspondence, workshops and questionnaires for owners and residents in the largest study area regarding area planning issues, and Planning Commission work sessions. The formal adoption process complied with the adopted public engagement requirements such as public notices and hearings, as provided in the Eugene Code for Metro Plan Amendments, Refinement Plan Amendments, Zone Changes and Code Amendments.

- **Multiple Unit Tax Exemption (MUPTE).** The MUPTE program is enabled by state legislation and designed to encourage higher density housing and redevelopment in the core area and along transit corridors. MUPTE is a critical component to Envision Eugene. Coupled with Area Planning, it is the primary strategy for addressing future multi-family housing needs. Specifically, the Council’s preferred growth strategy is to accommodate all multi-family housing inside the current UGB. In order to accomplish this goal, it is estimated that almost 1,600 homes will need to be accommodated through redevelopment that will not otherwise occur without support from community investments. The City Council recently revised the MUPTE program. Public outreach efforts in developing the new program included a key stakeholders workshop, meetings with individual stakeholders, industry experts, neighborhood leaders and city boards, commissions and groups, and two public hearings on the draft ordinance. The revised program will include new public input opportunities such as at least two neighborhood engagement meetings and a MUPTE Review Panel comprised of technical interests and neighborhood representatives.

- **Area Planning for the EWEB Riverfront site.** Consistent with Envision Eugene’s goal of compact urban development and accommodating more multi-family homes inside the current UGB, City staff provided support to the Eugene Water and Electric Board’s (EWEB) design staff and a nine-member Community Advisory Team for development of the EWEB Riverfront Master Plan. Prior to the formal adoption process, over the course of two years and after a series of public meetings, stakeholder interviews, and focus groups were held to solicit a broad cross-section of community input. A new special area zone for the site intended to implement the plan was proposed and ultimately approved. The formal adoption process for the special area zone complied with the adopted public engagement requirements such as public notices and hearings, as provided in the Eugene Code for Metro Plan Amendments, Refinement Plan, Zone Changes Code Amendments and Willamette Greenway Permit.

- **UGB Expansion Areas.** Two expansion areas are proposed. The Clear Lake Expansion area for jobs, a park and a school and the Santa Clara Community Park area. After accepting the recommended Community Vision, strategies, and actions in 2012, one of the City Council’s
specific directives was to analyze the potential environmental justice impacts and implications for neighbor communities from possible UGB expansion for industrial uses in the Clear Lake Road Area.

— **Subcommittee on Employment, Parks, and School Expansion (Clear Lake Area).** City Planning staff worked with a subcommittee comprised of representatives from the Planning, Sustainability, and Human Rights Commissions, as well as the Active Bethel Citizens and the City’s Toxics Board. Local public health advocacy group Beyond Toxics was also represented. In the course of developing the land use code, Planning staff closely coordinated with the Lane Regional Air Protection Agency (LRAPA), Lane County Public Health, and the City’s Toxics Right-to-Know program coordinator. This subcommittee met five times over a three month period to vet staff proposals for (1) managing land divisions to preserve large development sites in the expansion area and (2) determine the best local regulatory approach to environmental justice concerns around the siting of additional industrial and employment uses in an area of existing concentration.

— **Bethel Community Meeting in June (Clear Lake Area).** On June 24, 20**, City Planning staff held a public meeting in the Bethel community at Prairie Mountain School to share an overview of the UGB expansion process, as well as an explanation of the Clear Lake Overlay Zone and economic development planning efforts that will follow. Attendees included Clear Lake area property owners, real estate professionals, and members of the general public from the neighborhood. There was general support for UGB expansion. The majority of feedback received focused on future prospects for economic development and the complexity of wetlands mitigation. The primary request from attendees was for the City to continue working on these issues after the UGB expansion process is complete.

— **Golden Gardens Park (Clear Lake Area).** In 2006, City Parks and Open Space staff hosted three neighborhood workshops to discuss future improvements to Golden Gardens Park. The workshops provided opportunities for the public to give feedback on short term and long term improvements.

— Santa Clara Community Park. City Parks and Open Space staff have been discussing the need for a community park in the River Road / Santa Clara area with residents for years. The now proposed UGB expansion for this park site is the result of significant public input and discussion at the City Council in 2004 regarding which location in this area was preferred for a community park.

- **The UGB Adoption Package.** The UGB adoption package includes adopting the following components related to jobs, parks and school land need: the necessary components of the Envision Eugene Comprehensive Plan and associated technical documents, a new Eugene-specific UGB which includes a UGB expansion, zone changes and zoning code amendments. The provisions beginning at EC 9.7700 (Metro Plan Amendment Procedures), EC 9.7500 (Type V Application Procedures) and EC 9.7300 (Type III Application Procedures) constitute the City
components related the public involvement process. However, prior to initiating the formal adoption process, several outreach efforts occurred to educate the general public and interested community members on the adoption package and obtain feedback. Those efforts included:

— **TRG meetings.** The TRG has continued to meet on an as needed basis to verify the final assumptions that helped inform the Envision Eugene adoption package, such as regarding the buildable lands inventory, housing capacity, UGB expansion analysis and multi-family housing strategies. They also continue to work on the city’s growth monitoring program which will advance the public’s ability to be involved in the technical analysis of Eugene’s growth trends.

— **Subcommittee on Comprehensive Plan.** A subcommittee of the Planning Commission met several times to review each section of the draft comprehensive plan. Additionally, on September 2015, a joint workshop to review the draft comprehensive plan occurred with the Planning Commission, Sustainability Commission, Human Rights Commission, and Housing Policy Board.

— **Planning Commission Work Sessions.** Prior to the formal adoption process, 16 work sessions or updates with the Planning Commission were provided between 2014-2016 as the Envision Eugene adoption package and related components were being developed, including regarding the final technical analysis, the Clear Lake overlay zone, the comprehensive plan, the UGB expansion analysis, the monitoring program and the community design handbook. Kicking off the formal adoption process, five work sessions with the City and/or Lane County Planning Commissions occurred in Jan.-March 2017, providing an overview of the formal UGB proposal and process.

— **Outreach and events.** Public open houses and meetings with the Planning Commission and City Council were held in 2015 to inform the public and get feedback on the results of the final technical analysis that helped inform the Envision Eugene adoption package. Following completion of the technical analysis, additional public open houses were held on the draft Envision Eugene adoption package.

— **Summer outreach 2016.** As a result of Council discussions in October of 2015, new strategies were explored to accommodate our remaining multi-family need. The summer of 2016 included a significant outreach push on not only the options to accommodate the remaining housing need but also the UGB proposal, including:

  - Staffing an Envision Eugene booth at summer events across the city to talk about planning in general and bring awareness to Envision Eugene and the UGB adoption materials
  - Holding an open house and two community drop-in sessions on the specific details of the UGB proposal and housing options.
  - Three on-line topic-specific surveys
Letters and phone calls for input on the housing strategy options
Four topic-specific videos
Topic-specific fact sheets and infographic sheets
Facebook (currently over 480 likes)
25 e-newsletters to over 600 emails
Specific outreach and a questionnaire to underrepresented community members.

— Community Information Sessions. To kick off the formal adoption process, we provided six community information sessions across the city in early 2017 to educate community members on the UGB adoption proposal, the adoption process, and how to participate and comment.

The formal adoption process for the Envision Eugene adoption package is consistent with the adopted public engagement requirements such as public notices and hearings, as found in the Eugene Code for the applicable land use applications.

- The required Measure 56 notice was provided to property owners within the UGB expansion areas and owners of R-2 Medium Density Residential Zone property greater than 0.5 acre on February 1, 2017.
- The joint Eugene and Lane County Planning Commission public hearing on the proposal on March 7, 2017 was duly noticed on February 1, 2017 to: owners within the UGB expansion area and owners and residents within 1,000 feet of the proposed expansion areas; to owners of R-2 Medium Density Residential Zone property greater than 0.5 acre; to owners of Medium Density Residential designated land greater than 0.5 acre and not in a special area zone, and; to owners of property that is adjacent to, or bisected by, the Eugene urban growth boundary.
- The joint Eugene and Lane County Planning Commission public hearing on the proposal on March 7, 2017 was duly noticed to all neighborhood organizations, community groups and individuals who have requested notice, as well as to the City of Springfield and Lane County.
- In addition, notice of the public hearing was also published in the Register Guard.

Following action by the Eugene and Lane County Planning Commissions, the Eugene City Council and the Board of Commissioners held a duly noticed public hearing and public deliberations to consider approval, modification, or denial of the UGB proposal adoption package. The hearing notice was sent to the same extent as the joint Planning Commission hearing notice. The Lane County Planning Commission and the Board of Commissioners is participating in the UGB expansion component of the adoption package. These processes afford ample opportunity for citizen involvement consistent with Goal 1. Therefore, the proposed ordinance is consistent with Statewide Planning Goal 1. See the document titled Envision Eugene Summary of Public Engagement Activities 2010-2017 for further details.
Envision Eugene
Summary of Public Engagement Activities 2010-2017

In addition to the events and opportunities summarized below, on-going outreach and engagement included website updates, social media updates, videos of project events and neighborhood outreach, co-sponsoring relevant national speakers, and various media outreach and coverage (radio, City Club on radio, TV, newspapers).

Community Vision & Draft Recommendation

2010

EE newsletters sent to interested parties list
Presentations to various groups and stakeholders (6)
Feb.-March Community listening sessions (over 200 people individually or in groups)
April UGB-wide postcard mailed for Envision Eugene kick-off
May 4 & 26 Envision Eugene kick-off work shop meetings
June Student art project on Envision Eugene
June 2-4 Community Resource Group workshop
June 23 Public Workshop
July 22 Community Resource Group meeting
August 10 Community Resource Group meeting
Sept. 14 Community Resource Group meeting
Sept. 29 Community Resource Group redevelopment tour
Oct. 12 Community Resource Group meeting
Oct. 28 Public open house and map room
Nov. 3 Community Resource Group meeting
Nov. 16 Community Resource Group meeting
Dec. 13 & 14 Community Resource Group meeting

2011

EE newsletters sent to interested parties list
Presentations to various groups and stakeholders (18)
Jan.-Nov. Technical Resource Group meetings (24)
Jan. 13 Community Resource Group meeting
Jan. 20 Community Resource Group meeting
Jan. 25 Community Resource Group meeting
Feb. 1 Community Resource Group meeting
Feb. 3 Open house
Feb. 10 Open house
Feb. 22 Public Hearing on 2011 draft proposal
Feb.-March Survey – 2011 draft proposal
March 20 Community Resource Group meeting
April 4 Public work shop
April 25 Public Hearing, City Council – 2011 draft proposal
June 11 Letter- initial contact to potential Residential Re-designation areas
July 6 Open house
Aug. 3 Open house

Updated: June 19, 2017
Sept. 7  Open house
Oct. 18  Property owner drop-in session
Nov.-Jan. On-line open house
Nov. 14  Open House
Dec. 6  Open House

Draft Recommendation, Efficiency Measures, UGB Expansion/Land Capacity

2012

EE newsletters sent to interested parties list
Presentations to various groups and stakeholders (5)
Jan.-May  Technical Resource Group meetings (14)
Jan.-Nov.  Workshops (4) – Residential Re-designation/ Crow Road
March 20  Community Resource Group meeting
March 20  Community Forum - 2012 Draft Recommendation (Bethel)
April 2  Community Forum - 2012 Draft Recommendation (Churchill)
April 5  Community Forum - 2012 Draft Recommendation (Downtown)
April 10  Community Forum - 2012 Draft Recommendation (Sheldon)
April 12  Community Forum - 2012 Draft Recommendation (South Eugene)
April 17  Community Forum - 2012 Draft Recommendation (River Road)
April-May  Survey - 2012 Draft Recommendation
May 14  Public Hearing, City Council – 2012 Draft Recommendation
July-Oct  Letters, questionnaires – Residential Re-designation
Oct. 21  Letter - Employment & Industrial Code Amendments
Dec. 12  Open house - Employment & Industrial Code Amendments

2013

EE newsletters sent to interested parties list
Presentations to various groups and stakeholders (11)
April-Dec.  Technical Resource Group meetings (5)
Stakeholder outreach - Downtown/Mixed Use Code Amendments
Feb. 15  Letter - Employment & Industrial Code Amendments (I-1 areas)
March 4  Open house - Employment & Industrial Code Amendments (I-1 areas)
May 14  Public hearing, Planning Commission - Downtown/Mixed Use Code Amendments
June-Aug  Letters - Residential Re-designation
June 27 & 28  Meetings – Residential Re-designation (Rest-Haven)
July 15  Public hearing, City Council - Downtown/Mixed Use Code Amendments
Nov. 19  Public hearing, Planning Commission - Residential Re-designation
Nov. 5  Public hearing, Planning Commission - Employment & Industrial Code Amendments

2014

EE newsletters sent to interested parties list
Presentations to various groups and stakeholders (7)
Jan.  On-line survey - UGB recommendation
Jan. 13  Open house - UGB recommendation

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<th>Event Date</th>
<th>Event Details</th>
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<tbody>
<tr>
<td>Feb. 19</td>
<td>Open house - revised housing recommendation</td>
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<tr>
<td>May 5</td>
<td>Implementation Resource Group meeting Stakeholder outreach – MUPTE (2013-2014)</td>
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<td>June 3</td>
<td>Public hearing, City Council &amp; Board of Commissioners- Residential Re-designation</td>
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<tr>
<td>July 5</td>
<td>Implementation Resource Group meeting</td>
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<tr>
<td>April 21</td>
<td>Public hearing, Planning Commission- Employment &amp; Industrial Code Amendments</td>
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<td>Nov. 3</td>
<td>Implementation Resource Group meeting</td>
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<td>Nov. 14</td>
<td>Public Hearing, City Council - MUPTE downtown boundary</td>
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<td>Nov. 14</td>
<td>Meeting- UGB expansion (Bailey Hill)</td>
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<td>Nov. 19</td>
<td>Meeting- UGB expansion (Crest-Chambers)</td>
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<td>Nov. 20</td>
<td>Meeting- UGB expansion (Bloomberg-McVay)</td>
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UGB Expansion/Land Capacity, UGB Adoption Package, Multi-family Housing Strategies

2015

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<tr>
<td>Jan.-Dec.</td>
<td>EE newsletters sent to interested parties list Presentations to various groups and stakeholders (9)</td>
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<td>March 31</td>
<td>Technical Resource Group meetings (10)</td>
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<tr>
<td>June 24</td>
<td>Community Resource Group meeting Meeting – UGB expansion (Clear Lake)</td>
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<td>June 15</td>
<td>Public Hearing, City Council - MUPTE downtown boundary Ad hoc advisory group meetings - UGB expansion (Clear Lake overlay zone)</td>
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<tr>
<td>Dec. 1</td>
<td>Letter – UGB expansion area (Clear Lake overlay zone)</td>
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2016

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<tr>
<th>Event Date</th>
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<tr>
<td>Jan – Dec</td>
<td>EE newsletters sent to interested parties list (25)</td>
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<tr>
<td>Feb.</td>
<td>Technical Resource Group meetings (2)</td>
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<tr>
<td>May</td>
<td>Meetings – with sounding board of neighborhood representatives – UGB adoption</td>
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<tr>
<td>July – Sept</td>
<td>Envision Eugene booth and 20-minute neighborhood game at 12 community events</td>
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<tr>
<td>July – Sept</td>
<td>Three questionnaires – Comprehensive plan, UGB expansion, multi-family housing strategies</td>
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<td>July – Sept</td>
<td>Four videos –UGB overview, multi-family strategies, comprehensive plan, UGB expansion</td>
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<td>July</td>
<td>Letter to medium density residential designated and R-2 zoned property owners regarding multi-family housing options</td>
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<td>July</td>
<td>Letter to Clear Lake area residents regarding proposed expansion and overlay zone</td>
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<td>Sept</td>
<td>Outreach and questionnaire to underrepresented community members</td>
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<tr>
<td>Sept – Oct</td>
<td>Open house – Clear Lake and UGB proposal Two drop in sessions – UGB proposal and multi-family housing options</td>
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<tr>
<td>Dec</td>
<td>Video – UGB adoption proposal and process</td>
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2017

Newsletters sent to interested parties list

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<tr>
<th>Date</th>
<th>Event Description</th>
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<tr>
<td>Jan-Feb</td>
<td>Six Community Information Sessions – UGB proposal and process</td>
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<tr>
<td>Jan-Feb</td>
<td>Presentations to various groups and stakeholders (4)</td>
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<tr>
<td>Jan-March</td>
<td>Four Work Sessions, Eugene and Lane County Planning Commissions – UGB proposal and process</td>
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<td>March 7</td>
<td>Work Session and Public Hearing, Eugene and Lane County Planning Commissions – UGB proposal</td>
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<td>May-June</td>
<td>Presentations/Meetings with various groups and stakeholders – UGB proposal and process (scheduled)</td>
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<tr>
<td>June 15</td>
<td>Drop in session – UGB proposal and process</td>
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<tr>
<td>June 27</td>
<td>Information stations and presentation – UGB proposal and process (scheduled)</td>
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<tr>
<td>June 27</td>
<td>Public Hearing, Eugene City Council and Lane County Board of Commissioners (scheduled)</td>
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* This is a summary of the major events, presentations, and Q & A opportunities. It may not be fully exhaustive. Not included here is an exhaustive list of the numerous updates to about 600 interested parties by email newsletter, neighborhood or other newsletter articles, individual meetings, online information updates and personal contacts.

This summary also does not include all of the numerous work sessions and updates provided to boards and commissions, including; City Council, Planning Commission, Sustainability Commission, Housing Policy Board, Historic Review Board, Human Rights Commission, Toxics Board, Bicycle and Pedestrian Advisory Committee and the Lane County Board of Commissioners and Lane County Planning Commission.
School is out, pollen is up, and Eugeneans are busy making summer plans. We have exciting progress to report on the Envision Eugene front. First, thank you to the brave community members who faced the pounding rain to come to Workshop #2 on May 26th, at Churchill High School. We presented a range of potential approaches to growing in, and asked people to help identify potential quality of life benefits and concerns or other things we should consider as we move forward. The approaches to accommodate more people within our current city boundaries included things like small scale neighborhood infill, mixed use at a variety of scales, and downtown redevelopment. People’s comments are compiled and posted on the website at www.envisioneugene.org, in the Meeting #2 folder in the left hand column. (If you missed the 2nd workshop, you can provide your input via the survey link on the main web page).

Your ideas and comments helped staff refine the list of approaches, and we will be presenting new and refined information, including maps of where each approach could be implemented and how much housing and jobs each might accommodate, at Envision Eugene Workshop #3:

June 23, 2010
6:00-9:00 pm
Willamette High School Cafeteria
1801 Echo Hollow Road

The goal of this meeting will be to share new, more detailed information, report back how public input has shaped the project, and collect community feedback on the refined approaches to growth. Participants will have the opportunity to learn more about Eugene’s expected population growth for the next twenty years and the land and housing needs that may come with that growth. Based on feedback from the first two workshops, along with staff research and technical analysis, the following 9 approaches to managing growth will be presented:

1. Mixed Use Transit Corridors
2. Mixed Use Downtown
3. Mixed Use Centers
4. Small Scale Services in Neighborhoods
5. Multi-Family Housing Around Hot Spots
6. Increased Density for New Housing Development
7. Attached and Clustered Housing at Neighborhood Edges
8. Small Scale Neighborhood Infill
9. More Commercial Uses in Industrial Areas

People will have the opportunity to learn about and discuss each approach at discussion stations. Workshop materials and comment forms will also be posted on the website as soon as they are finished.

Community Group
In early June, City Manager Jon Ruiz convened a three day community workshop with the purpose of engaging participants with a wide variety of views on the issue of growth in a collaborative conversation. The workshop included exploration of conflicts in our community, and set the stage for allowing new ground to be created that
will serve a common community vision of our future. This group agreed to participate in follow up discussions that connect them to work done by staff and the general public over the course of the three Envision Eugene public workshops. During July and August, work will continue with this group and subsets of this group, allowing project momentum to continue over the summer and refined information to be presented to the broader community in the fall. A list of community workshop participants is available at www.envisioneugene.org on the Get Involved page; additional participants will be added to improve the diversity and balance of viewpoints. Additionally, the City Council discussed the workshop and the role of the participants in Envision Eugene at their June 16 work session. You can view the meeting at www.eugene-or.gov/citycouncil (click on City Council WebCast).

Youth Art Projects
Sixth graders at MeadowView, Family School, and O’Hara got involved in Envision Eugene by participating in art class projects on the topic of what their ideal future Eugene would look like. Over 100 completed pen and ink artworks will be on display at the Atrium at 99 West 10th Avenue, during the first Friday Art walk in July. They are fabulous!

For ages 14-21, we sponsored a contest for expressing the future of Eugene through a poster, video, or poem. Thirty-seven high school students submitted entries, and Mayor Kitty Piercy and Public Art Committee Member Tim Smith selected four winners earlier this week. The winners are still being notified, but they include a digital poster collaboration, a hand drawn Eugene scene, an artfully presented and beautifully written poem, and a colorful collage featuring some favorite Eugene places and a giant chicken. All of the contest entries will be shown at the art walk alongside the sixth-grade art work. Here’s a peek at some of them:

I hope to see you on June 23 at Willamette High, talk with you over the phone, or trade comments and information via the website, survey, or Facebook page. Please let me know if you would like to be removed from this mailing list. Summer newsletters will be sent about once a month and Public Workshop #4 is in the planning stages for fall.

Terri Harding
Public Involvement Manager, Envision Eugene
City of Eugene Planning Division
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www.envisioneugene.org
Happy July to all of you! Summer is in full swing, and Envision Eugene is keeping the momentum going from all of the positive energy generated during the first phase of public outreach. This first phase included three public workshops, which were held around the community on May 4th, May 26th, and June 23rd. The June 23rd workshop focused on a refined list of potential approaches to growing within our current growth boundary. Based on feedback from the first two workshops, along with staff research and technical analysis, the following 9 approaches to managing growth were presented:

1. Mixed Use Transit Corridors
2. Mixed Use Downtown
3. Mixed Use Centers
4. Small Scale Commercial in Neighborhoods
5. Multi Scale Housing Around Hot Spots
6. Increased Density for New Housing Development
7. Attached and Clustered Housing at Neighborhood Edges
8. Small Scale Neighborhood Infill
9. More Commercial Uses in Industrial Areas

Workshop materials, compiled comments, and comment forms are now posted on the website at www.envisioneugene.org in the Meeting #3 folder in the left hand column. See below for an image of one of the posters we presented.

Youth Art Projects
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Community Resource Group
In early June, City Manager Jon Ruiz convened a three day community workshop with the purpose of engaging participants with a wide variety of views on the issue of growth in a collaborative conversation. The workshop included exploration of conflicts in our community, and set the stage for allowing new ground to be created that will serve a common community vision of our future. This group agreed to participate in follow up discussions that connect them to work done by staff and the general public over
the course of the three Envision Eugene public workshops. During July and August, work will continue with this group and subsets of this group, allowing project momentum to continue over the summer and refined information to be presented to the broader community in the fall. A list of community workshop participants is available at www.envisioneugene.org on the Get Involved page; additional participants will be added to improve the diversity and balance of viewpoints.

Technical Analysis Update
During the buildable lands inventory (Eugene Comprehensive Lands Assessment or ECLA) City staff and consultants worked with stakeholders to develop baseline assumptions about Eugene’s future growth. These assumptions are largely based on recent historical data about development in Eugene. Future development, however, may be different from past development as a result of multiple factors, including changes in market conditions or in public policy. Through the ECLA work, some of the assumptions were identified as assumptions that could be adjusted during Envision Eugene to better reflect the future.

Two of the assumptions, housing mix and housing density, particularly warrant further analysis. Housing mix is the percentage of land needed for single-family housing compared to the percentage of land needed for multi-family housing. Housing density is the average amount of density assumed for new construction on vacant land. To identify what the City’s needed housing mix and housing density will be for the future, City staff and the ECLA consultants have analyzed factors such as housing density and mix trends and changing demographics. A draft memo detailing these assumptions and the implications of adjusting them is being finalized and will be available on our website next week.

I invite you to take a peek at project information via the website, take a survey, or join us on our Facebook page. Also, expect another newsletter in about two weeks, and additional public workshops are in the planning stages for fall.

Happy summer!

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Public Involvement Manager, Envision Eugene
City of Eugene Planning Division
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www.envisioneugene.org
### Mixed Use Transit Corridors

**Description**
Create stretches of medium and high density housing and businesses along transit corridors (major streets that serve as key transportation routes for people and goods such as LTD/Eugene routes). denser housing and businesses along corridors would transition into less dense housing to match nearby neighborhoods. mixed use corridors also include important public amenities such as bike and pedestrian-friendly streets and parks. corridors are relatively large geographic areas that may include one or more mixed use centers, or commercial hubs.

### What We’ve Heard
- Locate density in under-developed commercial corridors such as West 11th Avenue.
- Focus on transportation oriented development.
- Make better use of infrastructure investments.

### Implementation
**Current Status:**
- Mixed use is already allowed in commercial zones and along transit corridors, but very little mixed use development is currently happening.

**What Would Change:**
- Create a vision for mixed use development centered around transit corridors. We need to plan for what we want, identify barriers and overcome them.
- The vision should focus on building design, uses, relationship of buildings to streets, public spaces, transportation, parks, and natural areas, and services.
- Various incentives to encourage this type of development should be considered.
Summer in Eugene – what could be better? It’s the perfect time to sit back and think about what makes our community special. In planning for our future, Eugene’s special qualities are in the forefront of everyone’s mind – including guiding the work of Envision Eugene.

And what’s happening with that work, you might ask? As the “We Are Here” line in the diagram below indicates, right now we’re working with our Community Resource Group (more on that below), we’re deep into Technical Analysis of strategies to accommodate growth, and we’re starting on the framework for the plan itself. Envision Eugene is the first of our comprehensive plans to have an Urban Design element, which will be a great asset in showing how our community plan will look when implemented on the ground. More on Urban Design in an upcoming newsletter edition.
Community Resource Group
The Community Resource Group (CRG) is made up of about 50 people with a wide variety of experience and perspectives on growth issues. The CRG is engaging in a collaborative conversation about the Envision Eugene process, keeping project momentum going during the summer months. The group met for a three-day workshop in early June that set the stage for creating a common vision of our future community. A follow up meeting occurred on July 22 where participants discussed a number of issues that arose during their initial three day workshop, including: the potential effects of growth on school districts, growth in general, neighborhood character, climate and energy issues, housing affordability and mixed use redevelopment. These and other critical issues are being explored by CRG participants in order to inform the creation of a draft growth scenario within the next couple of months. The next CRG meeting is Tuesday, August 10. Stay tuned for a summary of that meeting and other CRG happenings.

Upcoming Events
Monday, August 9, from 11:30-1:30 in the Bascom/Tykeson Rooms at the downtown library, the Planning Commission will discuss Envision Eugene. The agenda materials are posted on-line at www.eugene-or.gov/pc. Envision Eugene will resume general public outreach events with an open house/workshop in late October. Time, location, and format details are still being planned, so stay tuned to find out more.

I hope you’re finding something fun to do this summer. Let us know what you love about Eugene by joining our Facebook page and telling us about it there. Recent topics include what’s going on with the Portland Plan, Eugene Hot Spots, and songs about Eugene.

I’d love to hear from you, so don’t hesitate to send me your thoughts, concerns, or ideas. Thanks for reading!

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www.envisioneugene.org

Find us on Facebook
The new school year has started, it’s crisp and sunny outside, and UO college students are coming back to town - it’s September in Eugene. There’s been a lot happening recently as summer winds up in our community – from the Eugene Celebration to Duck Football – and lots to share with regard to Envision Eugene. In case you missed it, last Sunday’s Register Guard (September 5) featured a cover story entitled “Seeking Common Ground on Growth.” Here is a link: http://www.registerguard.com/csp/cms/sites/web/news/sevendays/25194499-35/growth-eugene-committee-residents-ruiz.csp

Community Resource Group Update
The Community Resource Group (CRG) is made up of community members with diverse perspectives about growth, engaging in a collaborative conversation about Envision Eugene. Along with general public input and technical analysis, the CRG represents a source of input that will inform the creation of our community plan. In August, the group participated in an exercise designed to generate discussion about key concepts to incorporate into the plan. Small groups each worked with a base map to answer the following questions:

- Where are the places you cherish in Eugene?
- Where are the developments that you like, and of which you would like to see more?
- Where are the opportunities for more jobs, housing, and services?

The information gathered is being synthesized, and will be shared with the CRG at their next meeting on September 14th, posted on the web site, and displayed at future public events.

Upcoming Public Events
- Planning staff are putting together a tour of areas identified as opportunities for jobs, housing, and services within the urban growth boundary. Highlights include transit corridors and vacant/underutilized commercial and industrial properties, as well as neighborhood edges. The tour guide will include information about potential challenges or tools that may be necessary to spur redevelopment in specific places. Look for the tour guide and interactive map to be posted online by September 24th to allow anyone to take a self-guided tour.
- Resource packets with maps and information can be assembled to help your group, club, or neighborhood association Envision Eugene. Contact Terri to discuss how your group can best get involved.
- Planning is underway for a public Open House/Map Room event in October. Details will be published on the website and in the October newsletter.

As always, please drop me a line if I can answer any questions or you just want to chat about Envision Eugene.

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www.envisioneugene.org
Fall is in full swing - what a beautiful time of year in Eugene! This season is a busy one for everyone – including community members and planners working on Envision Eugene. This month, we have opportunities to get involved in neighborhood visioning activities, take a self-guided tour, and learn about recent project happenings at our Fall Open House/Map Room event. Full details are laid out below.

- **Redevelopment Tour**: Where are the opportunities for more jobs, housing, and services within the urban growth boundary? Take a self-guided tour of transit corridors and vacant/underutilized commercial and industrial properties, neighborhood hot spots and neighborhood edges. Click here for an [interactive map](#): Add your comments directly to the map to let us know what you think. Comments are most helpful by **November 1st**.

- **Visioning Exercise**: Any group can submit their ideas, comments and maps to help inform the creation of a draft plan for how Eugene will accommodate growth. The draft plan will be refined through community input and taken to the City Council early next year. Working on a city-wide or neighborhood map, answer the following questions. You can write out your answers or use stickers and notes placed on the map:
  - What are the places you cherish in Eugene?
  - Where are the developments that you like, and of which you would like to see more?
  - Where are the opportunities for more jobs, housing, and services?

Stakeholder groups can do this exercise independently, and provide their feedback directly to City staff, or we can provide staff for groups who would like assistance. The city-wide map is available at [www.envisioneugene.org](http://www.envisioneugene.org) in the Community Group Documents folder. To obtain a portion of the map scaled for your neighborhood, contact Terri Harding at [terri.l.harding@ci.eugene.or.us](mailto:terri.l.harding@ci.eugene.or.us). Input is most useful by **November 15th**.

- **Community Resource Group (CRG)**: This group will continue to meet to provide insight and feedback on issues related to growth. Their next meeting is **October 12th**. Check out materials from the September meeting at [www.envisioneugene.org](http://www.envisioneugene.org) in the Community Group Documents folder, including maps compiling the results of the visioning exercise described above, as it was completed by the CRG. Other documents, including an outline of CRG next steps and meeting topics and an updated participant list, will be posted by tomorrow.

- **City Council Update**: On **October 13th**, Planning Director Lisa Gardner will provide a project update to the Eugene City Council. You can watch the webcast live [here](#) or attend the session at the McNutt Room in City Hall at 777 Pearl Street. The work session begins at noon.

- **Transportation Events**: This fall, several transportation projects connected to Envision Eugene are entering public outreach phases. These include the Eugene Transportation System Plan, the Bicycle and Pedestrian Master Plan, and LTD’s Long Range Transit Plan. To sign up for the
transportation newsletter, InMotion, for all the details, email lindsay.r.selser@ci.eugene.or.us.

- **Public Open House/Map Room:** The next Envision Eugene general public event is scheduled for October 28th from 4:00-7:00 pm in the Bascom-Tykeson Room of the Downtown Public Library. Over the summer, city staff have been analyzing different methods of planning for growth. Come downtown to see and hear about findings and themes that are shaping into a draft plan for how and where Eugene should grow. Also view work produced by the Community Resource Group, art created by Eugene 6th graders, and a demonstration of modeling software being used to look at different growth options.

If these opportunities don’t work for you, or you have another idea about how to engage with Envision Eugene, please give me a call or shoot me an email. The Envision Eugene planning team wants to hear from you – we’re planning for all of our future.

Terri Harding  
Envision Eugene Public Involvement Manager  
City of Eugene Planning Division  
(541) 682-5635

[Find us on Facebook](www.envisioneugene.org)
This month, Envision Eugene reports on our recent Fall Open House/Map Room event, and lets you know about upcoming opportunities to get involved in various local happenings.

- **Public Open House/Map Room**: On October 28th at the Downtown Public Library, over 150 people stopped by the Envision Eugene Map Room event to view maps, web tools, reports, and videos related to planning for our next twenty years. Many of the materials from the Map Room have been posted at [www.envisioneugene.org](http://www.envisioneugene.org) in the Public Meetings folder. Check them out!

- **Community Resource Group (CRG)**: The CRG met on October 12th and November 3rd to provide various community perspectives about our growth options. Meeting materials can be found at [www.envisioneugene.org](http://www.envisioneugene.org) in the Community Resource Group folder, including maps, staff presentations and meeting notes. Additional meetings are planned for November 16 and December 7.

- **Planning Commission/City Council Work Session**: On November 22nd, Eugene’s Planning Commission and City Council will hold a joint workshop on Envision Eugene. You can watch the webcast live [here](http://www.envisioneugene.org) or attend the session at the McNutt Room in City Hall at 777 Pearl Street. The work session begins at 5:30 pm.

- **Transportation Planning**: Local transportation planning projects are continuing their public outreach. These include the [Eugene Transportation System Plan](http://www.envisioneugene.org), the [Bicycle and Pedestrian Master Plan](http://www.envisioneugene.org), and [LTD’s Long Range Transit Plan](http://www.envisioneugene.org). In addition, there’s news to know about the West Eugene EmX and the upcoming Transit Town Hall on November 9. Learn more [here](http://www.envisioneugene.org).

- **Sustainable Eugene**: In September, the Eugene City Council endorsed the Community Climate and Energy Action Plan. Find it [here](http://www.envisioneugene.org). This award winning plan contains recommendations that relate to transportation and land use, and are being folded into Envision Eugene.

We’ll be doing some video projects around town soon; look for the videos on the website by the end of the month. If there’s something going on in your part of town that we should know about, please contact me. Thank you for your continued interest in the future of our community!

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[Find us on Facebook](http://www.envisioneugene.org)
Happy December! This month, Envision Eugene heats up through a City Club Program, new outreach videos, a Working City video segment, Community Resource Group meetings, and a City Council work session before the winter break.

- **City Club program on Envision Eugene**: Today, December 3rd, at 11:50, City Manager Jon Ruiz will moderate a panel discussion on Envision Eugene. The event will be held from 11:50-1:15 at the Eugene Hilton, in the 12th Floor Vista Room. The program will be broadcast on the KLCC radio station, 89.7 FM, at 6:30 PM on Monday, December 6th. Visit [www.cityclubofeugene.org](http://www.cityclubofeugene.org) for more information.

- **Open House Video Now Available**: On October 28th at the Downtown Public Library, over 150 people stopped by the Envision Eugene Open House/Map Room event to view maps, web tools, reports, and videos related to planning for our next twenty years. A video recap of the event is linked on our web page at [www.envisioneugene.org](http://www.envisioneugene.org), and the materials from the Map Room have been posted as well in the Public Meetings folder.

- **Envision Eugene on Working City**: MetroTV Cable 21 produces a monthly show called Working City highlighting city projects. This month, Envision Eugene is featured. Go to [http://www.metrotv.org/workingcity.html](http://www.metrotv.org/workingcity.html) for show times. The segment will premiere tonight, December 3rd, at 8 pm on cable channel 21.

- **Planning Commission/City Council Work Session**: On November 22nd, Eugene’s Planning Commission and City Council held a joint work session on Envision Eugene. You can watch the webcast here, including the City Manager’s discussion of his proposed framework for the February decision-making by the Council. The next Council work session on Envision Eugene is scheduled for December 15th at noon in the McNutt Room of City Hall.

- **Community Resource Group (CRG)**: The CRG met on November 16th and formed four small groups to look at specific issues before the next meeting. The groups are looking into Housing Mix, Economic Development, Mixed Use Redevelopment, and Technical Resource Needs. Meeting materials can be found at [www.envisioneugene.org](http://www.envisioneugene.org) in the Community Group Documents folder. A two day meeting is planned for December 13 and 14, when the small groups will bring information back to the large group for discussion and integration.

- **City Manager's Recommendation**: After the December CRG meeting, the City Manager will begin to assemble his set of recommended strategies and tactics for accommodating our future growth. The recommendations will be vetted at public events in January and February before being brought to Council in late February. The public events are still being confirmed, so please visit [www.envisioneugene.org](http://www.envisioneugene.org) for the latest information.

Send your feedback on this newsletter, ideas for public outreach, or comments and questions to terri.l.harding@ci.eugene.or.us. Thank you for your continued interest in the future of our community!

Terri Harding, Envision Eugene Public Involvement Manager
City of Eugene Planning Division
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Happy New Year, Eugene! Over the past year, more than 1,000 people have engaged with Envision Eugene through listening interviews, small group meetings, public workshops, Facebook, e-newsletters, art projects, videos, community events, and on-line surveys. We’ve been on the radio, at City Club, in the newspapers, and in your mailbox. Not to mention the 70 or so community members who have been so generously giving their time as part of the Community Resource Group. In fact, the CRG was given a community award earlier this week at the Eugene State of the City address at the Hult Center (see picture above)! A heartfelt thank you was delivered by Eugene Mayor Kitty Piercy, and accepting on behalf of the group were Rusty Rexius, Kevin Matthews, Mia Nelson, and Sue Prichard.

We are fast approaching the Council’s scheduled February 28th meeting, when they will have the opportunity to act on a package of strategies for accommodating growth in our community. The strategies are informed by public input, CRG work, and technical analysis. The next two months are packed with events leading up to and following release of the draft package of strategies – slated for January 31st. Upcoming events designed to explain the proposal and solicit public feedback include:

- **Community Resource Group (CRG):** The CRG met on December 13th and 14th and discussed preliminary findings of the four small groups that were formed in November. Meeting materials can be found at [www.envisioneugene.org](http://www.envisioneugene.org) in the Community Group Documents folder. The groups are looking into Housing Mix, Economic Development, Mixed Use Redevelopment, and Technical Resource Needs. Together with staff, the small groups will be refining ideas for accommodating growth pertaining to their topic area, during the month of January. The full CRG will meet four more times to conclude its work by early February.

- **The City Council** is holding a series of Envision Eugene work sessions over the three month period from December 2010 to February 2011. On December 15, the council discussed economic prosperity as it relates to Envision Eugene. On January 12 and 26, they will discuss the other two elements of the “triple-bottom-line” – social equity and environmental stewardship. Work sessions on February 9 and 16 will introduce the draft package of strategies and tactics. You can watch the webcasts of each work session [here](http://www.eugene-or.gov), or attend in person at City Hall, 777 Pearl Street, McNutt Room. Council will hold a public hearing on February 22 in the Council Chamber and a work session on February 28 in the McNutt Room. Full meeting details can be found at [www.eugene-or.gov](http://www.eugene-or.gov).

- **Public Open Houses** are planned for February 3rd and February 10th, from 4-7 pm at local public schools. Locations are still being confirmed, but the February 3rd meeting will be held in the River Road area and the February 10th meeting will be held in South Eugene. Specifics will be announced on the website at [www.envisioneugene.org](http://www.envisioneugene.org) as they are confirmed.
• **Planning Commission Meetings** are planned as follows: January 24, February 7, February 9, February 16. See www.eugene-or.gov/pc for details.

• Hand in hand with Envision Eugene, our community is planning for our future transportation needs via the **Transportation System Plan** update at [www.EugeneTSP.org](http://www.EugeneTSP.org). Take the TSP survey linked there to help the project team identify critical issues and concerns.

• **The Eugene Redevelopment Video** is featured on the project website at [www.envisioneugene.org](http://www.envisioneugene.org). This video follows the Community Resource group bus tour of places in our community that have been identified as having potential for redevelopment – along transit corridors, in commercial centers, and on neighborhood edges. **The Open House Video** is still linked on the website as well, and the materials from the October 28 Open House/Map Room event have been posted in the Public Meetings folder.

Thanks for your interest and commitment to the future of our community. I look forward to seeing you in person or on-line as we move forward during this exciting time in the project!

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City of Eugene Planning Division
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[www.envisioneugene.org](http://www.envisioneugene.org)
City Manager Jon Ruiz is pleased to announce his draft set of proposed strategies to accommodate growth over the next 20 years, entitled Envision Eugene: A Legacy of Livability. The proposal document is attached to this message and is available on the web at www.envisioneugene.org. The general public, as well as groups, boards, and commissions are being asked to give feedback on the draft list of strategies. The questions for each strategy are:

- Are you OK with this strategy?
- If not, under what conditions would you be OK with this strategy?
- Do you have questions about this strategy?

Use the on-line survey to tell us what you think. It will be available on our website, www.envisioneugene.org, on Thursday February 3rd.

- **Open Houses** are scheduled from 4-7 pm on February 3 and 10 at local public schools. The February 3rd meeting will be held at North Eugene High School in the River Road area (200 Silver Lane) and the February 10th meeting will be held at Roosevelt Middle School in South Eugene (680 East 24th). Talk with staff about the Seven Pillars, and proposed strategies to achieve them. The Seven Pillars of Envision Eugene are to:
  - Provide ample economic opportunities for all community members;
  - Provide affordable housing for all income levels;
  - Plan for climate and energy uncertainty;
  - Promote compact urban development and efficient transportation options;
  - Protect, repair, and enhance neighborhood livability;
  - Protect, restore, and enhance natural resources; and
  - Provide for adaptable and flexible implementation.

- **Neighborhood Meetings:** Staff is available to attend neighborhood meetings related to the draft proposal. Contact Terri Harding at terri.l.harding@ci.eugene.or.us to request staff attendance at your meeting.

- **Planning Commission/City Council Work Sessions:** Eugene’s Planning Commission and City Council will hold joint work sessions on the draft strategies on February 9 and February 16 at noon in the McNutt Room of City Hall. You can attend the meetings as an observer or watch the webcast here.

- **The City Council** will hold a public hearing on February 22 in the Council Chamber. An information table will be available prior to the hearing, starting at 6 pm, to provide members of the public an opportunity to learn more about the proposal and ask questions of staff. The council work session to take action on the proposal, currently scheduled for February 28, may be rescheduled to avoid a conflict with a meeting in Washington DC. This will also provide a little more time for council to review public comments before taking action. Council’s meeting is now planned for March 14th in the McNutt Room of City Hall. Full meeting details can be found at www.eugene-or.gov.
• **Community Resource Group (CRG):** The CRG concluded their work informing the development of strategies on February 1st. Thank you to all participants for your lengthy and valuable commitment to our community! The Technical Resource Group, a subgroup of the CRG, will continue to meet to advise staff and consultants on technical analysis steps to carry the implementation work forward.

• **Bethel Video:** Now Available at [www.envisioneugene.org](http://www.envisioneugene.org) and YouTube! Check out what people in the Bethel area love about their neighborhood and what they would like to see in the future.

Thank you for your continued interest in the future of our community!

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City of Eugene Planning Division  
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[www.envisioneugene.org](http://www.envisioneugene.org)

Artwork by Lily Hansen
March 2011

Welcome to the monthly project newsletter for Envision Eugene, our community’s plan for accommodating our anticipated growth over the next 20 years. As we move into spring, words and concepts are being translated into an illustrated community vision. Planning staff is very excited to share the latest work with you.

Envision Eugene: A Legacy of Livability has been updated to include graphics, maps, and reference information. The full size file is available for viewing or downloading on the website at www.envisioneugene.org. A smaller file, with slightly less graphic clarity, is attached. Also attached is a summary of the changes to the strategies and tactics that have been made to the proposal since it was first released on February 2nd.

The Planning Commission will discuss the updated draft proposal at their 11:30 am meeting today, March 7th in the Downtown Library Bascom-Tykeson rooms. Meeting details at www.eugene-or.gov/pc.

The City Council will hold a meeting to consider action on the draft proposal on March 9th in the McNutt Room of City Hall at noon. Full meeting details can be found at www.eugene-or.gov.

Once council makes their recommendations on the draft proposal, a new “Council draft” will be made available for a six-week public comment period. During that time, a second public hearing will be scheduled; tentative date is April 25th. Email or written comments on this version of the proposal are welcome, and a new survey will be posted on the website once the council draft is released. Send email comments to terri.l.harding@ci.eugene.or.us or mail to Terri Harding, c/o Eugene Planning Division, 99 West 10th Avenue, Eugene, OR 97401.

City Club: Envision Eugene has been invited to return to City Club to discuss the draft proposal on March 18th. Planning Director Lisa Gardner will introduce a panel of community members to talk about the pillars and strategies. Panelists include Pat Johnston, Randy Hledik, Shawn Boles, Carolyn Weiss, Bill Aspegren, and Kate Perle. See www.cityclubofeugene.org for more information.

Please send my way any questions or comments you may have about Envision Eugene. You can always find the latest information on the website at www.envisioneugene.org. Thank you!

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www.envisioneugene.org
April 2011

Welcome to the monthly project newsletter for Envision Eugene, our community’s process for creating and achieving a vision for accommodating our future growth.

We reached a project milestone on March 9, when the City Council reviewed the draft proposal, *Envision Eugene: A Legacy of Livability*. The council voted unanimously to send the proposal out for public review and comment. The full size file is available for viewing or downloading on the website at [www.envisioneugene.org](http://www.envisioneugene.org), along with a link to a feedback survey. A smaller file, with less graphic clarity, is attached to this message.

**Open House/Craft Time at the Library:** On April 4th (next Monday) from 3-6 pm, you are invited to come to the Downtown Library for an open house/Q & A session with Envision Eugene staff.

***Both children and adults will be invited to participate in making crafts and art at this event. Activities will include an Envision Eugene mural, a craft project designed and overseen by city Recreation staff, and postcard making with pens and ink. This event is designed to allow parents to bring their children along, and to involve community members of all ages in Envision Eugene.***

At the event, staff will be soliciting comments on four main themes of the draft proposal:

- **Mixed Use Redevelopment.** Compact development and efficient transportation options are community priorities. Future land need for commercial activities and multi-family housing will be accommodated inside the existing UGB, along key transit corridors and in core commercial areas.
- **Tools and Incentives.** Implementation tools and incentives (such as financial incentives and infrastructure projects) will be required to facilitate redevelopment activities along key transit corridors and in core commercial areas.
- **Industrial Land Strategy.** Economic development is a community priority, to increase local employment rates, wages, and standard of living. We will facilitate redevelopment of our existing industrial lands as our first priority. However, Eugene lacks available land for large lot industrial development, and the UGB will need to be expanded to accommodate this land need. Currently, 400-500 acres is proposed. Potential expansion areas will be determined by prioritizing the preservation of high value agricultural lands and habitat areas.
- **Neighborhood Livability.** Densities will not be increased in our single-family neighborhoods beyond what is currently allowed. Furthermore, we will continue to develop design standards to ensure that future development is in-keeping with the character of existing neighborhoods. The need for additional land to accommodate a future supply of single-family homes is still under study. A recommendation is expected in May of 2011.
Public Hearing: The City Council invites your comments on the March 2\textsuperscript{nd} draft proposal at a public hearing on \textbf{April 25\textsuperscript{th}}. The hearing will begin at 7:30 pm in the Council Chamber at 777 Pearl Street.

Email or written comments on the draft proposal are welcome. Send email comments to terri.l.harding@ci.eugene.or.us or mail to Terri Harding, c/o Eugene Planning Division, 99 West 10\textsuperscript{th} Avenue, Eugene, OR 97401.

City Club: We had a great discussion about the draft proposal on \textbf{March 18\textsuperscript{th}} with Lisa Gardner, Pat Johnston, Randy Hledik, Alan Zelenka, Larry Banks, Bill Aspegren, and Kate Perle. You can listen to the radio broadcast of the program at www.klcc.org. More information is available at www.cityclubofeugene.org.

Saturday Market starts \textbf{this weekend}, along with an expanded Lane County Farmers Market. It’s a beautiful time to be living, working, and playing in Eugene! Thanks for your involvement.

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www.envisioneugene.org
Welcome to the monthly project newsletter for Envision Eugene, our community’s process for creating and achieving a vision for accommodating our future growth. The month of April offered several opportunities for public feedback on the Envision Eugene draft proposal, as requested by City Council.

- An **Open House/Craft Time** event was held at the Library on April 4th.
- A **Survey** was posted on-line in late March and closed April 13th.
- A **Public Hearing** was held in the Council Chamber on April 25th. Twenty-two people testified and several others sent in written testimony. Those in attendance generally supported the March 2nd draft proposal, in particular the industrial land redevelopment strategies and the expansion proposal for 400-500 acres for targeted employment uses, like green technology and manufacturing. The hearing can be viewed on-line via the Council Webcast archives.

**Recent Media Coverage**

**KLCC Radio Program:** Jon Ruiz and Mia Nelson were interviewed by Tripp Sommer on KLCC’s Northwest Passage on April 18th.

**Bill Randall** wrote this **Op-Ed piece** on Envision Eugene, which appeared in the Register Guard on April 22nd.

**Lisa Gardner** and **Paul Conte** were interviewed on KPNW’s radio wake-up call on April 25th.

**Technical Update**

The Technical Resource Group is a sub-committee of the Community Resource Group. Co-facilitators Sue Prichard and Shawn Boles are leading the TRG through discussions about assumptions and analysis methodology related to our land needs and proposed strategies and tactics for accommodating growth. Meeting materials are posted in the **Technical Resource Group** subfolder of the CRG Documents folder on the **Envision Eugene** home page. Also, take a look at the updated **What’s It All About** page. You will find answers to frequently asked questions about the Envision Eugene process.

**Next Steps**

Staff will present an update to the Planning Commission on May 23 and the City Council on May 25. Meeting materials will be posted on the **Planning Commission** and **City Council** websites prior to those meetings.

**Email or written comments** and questions on the draft proposal are welcome at any time. Public comments are packaged and made available for the Planning Commission and City Council to help inform their future decision making. Send email comments to **terri.l.harding@ci.eugene.or.us** or mail to Terri Harding, c/o Eugene Planning Division, 99 West 10th Avenue, Eugene, OR 97401.

Lastly, if you haven’t seen the **Envision Eugene Proposal Video**, be sure to check it out. Pat Johnston, Randy Hledik, Alan Zelenka, Larry Banks, Sue Prichard, and Kate Perle all have starring roles.

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Envision Eugene Public Involvement Manager  
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[www.envisioneugene.org](http://www.envisioneugene.org)
June 2011

Welcome to the monthly update for Envision Eugene. This community project is creating a vision for accommodating our future growth and designing the necessary steps to achieve the vision. In May, staff provided project updates to the Planning Commission and City Council. Did you know that Planning Commission meetings are now viewable via webcast? See the May 23 meeting video here.

The council update on May 25 included Technical Resource Group (TRG) members Shawn Boles and Rick Duncan to talk about some of the work of the TRG on residential land assumptions, including what kinds of housing to plan for in the future. View the meeting video here. As time was short to get through all of the material, staff are scheduled to go back to Council on June 8 at noon. The June 8 staff presentation will include an overview of where we are within the overall process, pickup on the housing need discussion, and introduce a concept for phased implementation. The goal of phasing implementation is to use new land only as we need it, through the use of appropriate trigger mechanisms. An update on Envision Eugene appeared in the Register Guard on May 26th, following the council meeting.

Technical Analysis Update - Housing

The Technical Resource Group (TRG) is providing input and review of technical assumptions and analysis methodology. The goal is to involve community experts in the technical aspects of the project, strengthening public confidence in this important work. Guiding the TRG’s work are the strategies in the draft Envision Eugene proposal to adopt compatibility measures, maintain allowable density levels within existing single family neighborhoods, and concentrate redevelopment along transit corridors and in core commercial areas. The TRG is looking at infill and redevelopment assumptions that will influence the amount of land we need for different types of housing. This work will be mostly complete by the end of the month, and will be featured in an Envision Eugene project update to council on June 29.

A public event/open house following the council presentation (date and time TBD) will allow the public to review maps and information about residential infill and redevelopment. This will be an important step for people to see the level of development assumed within established neighborhoods, and where additional housing density will be promoted.

If you are not around in July, don’t despair! The summer months will be used to hold individual and small group stakeholder meetings, refine the analysis, and post documents and maps on the website. Additional public meetings, hearings, and Planning Commission and City Council work sessions will be held in September and October. Council will not be asked to act on these important decisions until adequate public review and comment periods have been made available.

Council Initiates Code Amendments

During an Envision Eugene work session on May 25th, the City Council initiated code amendments for Infill Compatibility, Opportunity Siting, and Mixed Use Development. The goal of these amendments is to get the ball rolling on changes to the land use code that will achieve some long-standing community goals. These amendments need not wait for adoption of the Eugene urban growth boundary. You can learn more about the amendments at a conceptual level in the May 25th Council memo (click EE City Council Presentations to find a copy of the 5/25/11 work session memo). Specific code language will be developed through a public process over the coming months. During the summer, staff will be working with past Infill Compatibility Standards (ICS) and Opportunity Siting (OS) committee members, as well as community members with downtown and mixed use redevelopment expertise to develop code language that meets the objectives outlined in the Envision Eugene proposal. As with our land need strategies, Council will not be asked to act on these important decisions until adequate public review and comment periods have been made available.
**Envision Eugene Overview**

The diagram below (also available online at [www.envisioneugene.org](http://www.envisioneugene.org)) shows a high level overview of the Envision Eugene process. The bulk of 2010 was spent doing community visioning, through open houses, workshops, listening sessions, Community Resource Group meetings, and on-line surveys. Public outreach will continue throughout the process. Technical Analysis also runs through the entire project.

With the publication of the March 2nd Envision Eugene Proposal, or “Pillar” Document, the project began a phase of strategy refinement. We are receiving feedback on the pillars, strategies, and tactics contained in the March 2nd document, and fleshing out the numbers and maps associated with projecting and meeting our land needs for residential, commercial, and industrial development. Numerous ways will be made available for the public to weigh in on the numbers and maps before we get to the formal adoption process.

The implementation phase itself will also include many opportunities for community involvement at the individual, group, and neighborhood levels. Upcoming meetings and events are listed on the project website and advertised through local media networks.

![Envision Eugene Process Diagram](image)

**Next Steps**

At the City Council meeting next Wednesday, **June 8**, staff will continue the housing mix and phased implementation discussion. Staff will present preliminary single family land need information to the Planning Commission on **June 27** and the City Council on **June 29**. Meeting materials will be posted on the Planning Commission and City Council websites prior to those meetings.

**Summer Events**

A summer block party will be held on East 31st Avenue on June 18th. Organizers of this event are requesting Envision Eugene materials to hand out at a lemonade stand. What a great idea for summer outreach! If you would like materials for your event, email me at terri.l.harding@ci.eugene.or.us.

Thanks for your interest, and please pass this message along to anyone you think might like to read it.

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[Find us on Facebook](https://www.facebook.com/envisioneugene)
July 2011 News
Welcome to the monthly update for Envision Eugene. This community project is creating a vision for accommodating our future growth and designing the necessary steps to achieve the vision. June was a busy month!

Project Team Members Accept State Award
Envision Eugene set out to use a more collaborative public involvement approach than typical land use projects. The Citizen Involvement Advisory Committee (CIAC) of the state Department of Land Conservation and Development (DLCD) thinks that is a good thing. The committee recently awarded Envision Eugene its annual STAR Award for citizen involvement in land use. CIAC members noted that Envision Eugene is innovative, represents substantial effort and commitment, and has demonstrated successful results. The award was presented by Land Conservation and Development (LCDC) Chair Jon VanLandingham to CRG participants Mia Nelson and Sue Prichard and Planning Director Lisa Gardner in Salem on June 22.

Preliminary Information on Single Family Housing Needs
The Technical Resource Group (TRG) spent over 200 collective hours in June alone poring over maps and analyzing spreadsheets to review data and assumptions that go into our single family land need. They have reached some preliminary conclusions, including verification of the vacant land capacity established under ECLA, and agreement that lots under an acre in size with some development on them should be assumed to infill at historic rates. Lots over an acre in size have more capacity for infill development, and the TRG is still working on what rate to assume for infill development on those lands. Next Wednesday’s open house at the Atrium building, 99 West 10th, will be a chance for the general public to see this preliminary information, including maps showing the location of vacant lots and partially vacant lots over an acre in size.
TRG members and staff provided project updates to the Planning Commission on June 27 and City Council on June 8 and June 29. Planning Commission videos can be found here and Council webcasts are archived here.

**Summer Open Houses Scheduled**

Three open houses will be held in the Atrium this summer, on the first Wednesdays of July, August, and September from 3-6 pm. These informal drop in events are a great way to learn about the project and talk with city staff about your questions. And while you’re downtown, you can check out Summer in the City events that start at 5pm. If you’d like an Open House poster to display at your office or gathering place, or a digital copy to send to your networks, email terri.l.harding@ci.eugene.or.us to request one.

**Next Steps**

Staff will present refined single family land need information to the Planning Commission on July 11 and July 25 and the City Council on July 27. The meetings on the 25th and 27th will also include information about emerging preferences for industrial expansion locations. Meeting materials will be posted on the Planning Commission and City Council websites prior to those meetings.

See you at the Open Houses!

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www.envisioneugene.org
August 2011 News

Welcome to this month’s update for Envision Eugene, our community process for creating and achieving a vision for accommodating our future growth. Summer is finally in full swing, and we have updates to share!

Planning staff provided project updates to the Planning Commission on July 25 and City Council on July 27. These updates included the topics of land need for single-family housing and industrial lands. Planning Commission videos can be found here and Council webcasts are archived here. The staff PowerPoint presentation can be found on the Envision Eugene homepage at this link.

Preliminary Information on Industrial Lands

 Analysis is underway looking at potential expansion areas to accommodate large lot industrial uses like manufacturing and green technology. The map below will be among those on display at the second summer open house tomorrow, August 3rd, from 3-6 pm in the Atrium at 99 West 10th, across from the downtown library and bus station.

Next Steps
• Our third summer open house is scheduled for September 7th, again from 3-6 pm in the Atrium; we will be providing updated information on our land needs for housing and jobs. Don’t forget that while you’re downtown, you can check out Summer in the City events that start at 5pm.

• Technical Resource Group meetings continued during July and two meetings are scheduled during August. Find meeting materials here.

• Several neighborhood associations will be discussing Envision Eugene at their upcoming board or general meetings in August and September. To request a presentation or discussion with a planner at your meeting or event, please contact Terri and we will get something scheduled.

• Additional opportunities for public review and comment on land need recommendations will be provided prior to any Planning Commission action or decision making by the City Council later this year.

See you at tomorrow’s Open House or out in your neighborhood!

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www.envisioneugene.org
Welcome to this end-of-summer update for Envision Eugene, our community process for creating and achieving a vision for accommodating our future growth. Summer is coming to a close, and we will be hitting the ground running with public events and meetings right after Labor Day.

Planning staff continued to meet with the Technical Resource Group, TRG sub-committees, and the Planning Commission during the month of August. A calendar of upcoming TRG meetings is now posted [here](#). If you would like to observe a meeting, email [Heather O’Donnell](#) to get the most up-to-date location information. The TRG will be working on Partially Vacant Residential Lands and Mixed Use Development assumptions during September.

Our third summer open house is scheduled for September 7th, again from 3-6 pm in the Atrium; we will be providing updated information on our land needs for housing and jobs. Over 34 maps and posters will be on display, including draft neighborhood maps of vacant and partially vacant residential lands. This one was shared recently with the River Road Community Organization.
This fall is the timeframe for coming to a determination on our final land need for both housing and jobs. Additional opportunities for public review and comment on the emerging land need recommendations will be provided prior to any action by the Planning Commission or decision making by the City Council later this year. The next Council work session is scheduled for September 28th at noon in the McNutt Room. Public hearings and meetings are being scheduled for October through December, and will be announced on the website and in this newsletter when they are confirmed.

To schedule a staff presentation at your neighborhood or other group’s meeting or function, contact Terri Harding. See you at the September 7th Open House!

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www.envisioneugene.org
Welcome!

Welcome to this early fall update for Envision Eugene, our community process for creating a vision for accommodating our future growth and a plan to get us there. Staff and committee members have been busy refining our draft strategies as outlined in the March 2, 2011 proposal, and now are preparing to turn the vision and strategies into action. This fall, a series of events and meetings are planned to keep people informed on the project progress, and to collect feedback on the emerging recommendations.

This fall Envision Eugene will be trying something new. In addition to in-person events, on-line open houses will be available through the Envision Eugene website. Starting on November 1st, web visitors will be able to find videos, surveys, and information related to a specific topic, all in one place. The first on-line open house will cover housing and

Neighborhood Presentations

Vacant Land Maps

The draft
public land needs, and
will run for three weeks,
through the November
21st Council public
hearing on that
topic. The November
newsletter will contain
more information and a
description of the
second on-line open
house, which will cover
industrial land needs
and mixed use
redevelopment
strategies.

Continue

During August and September,
River Road, Santa Clara, Crest
Drive, Cal Young, and Downtown
Neighborhood Associations
heard presentations on Envision
Eugene. Up next are Bethel and
Whiteaker in October and
November, respectively. It’s not
too late to request a
presentation! Email Terri
Harding to do so, or visit the
website to look at presentations
already produced for different
parts of town.

October Events

October 10 - Planning Commission
October 12 - City Council
October 24 - Planning
Commission
October 31 - Planning
Commission

neighborhood maps
showing vacant and
partially vacant
residential lands
greater than an acre
in size were on
display at the
September 7th Open
House and are now
on the
website. These
maps show the
inventory and
location of the
vacant and partially
vacant lands, but
not their capacity, or
the number of
homes that could be
built on each piece
of land. Residential
capacity information
is being finalized by
staff and Technical
Resource Group
members, and is
scheduled to be
published later in
October for public
review.
**Envision Eugene**

_Noticias para los padres – Octubre 2011_

Envision Eugene es nuestro proceso comunitario que ayudará a crear una visión para ayudar a acomodar al crecimiento futuro y también, un plan para lograrlo. En los últimos 18 meses, el personal de la ciudad ha estado trabajando con la comunidad para desarrollar un proyecto de propuesta para el futuro llamado Envision Eugene: Un legado de Habitabilidad. Usted puede descargar la propuesta en [www.envisioneugene.org](http://www.envisioneugene.org). Ponemos énfasis en el desarrollo nuevo y la renovación a lo largo de los corredores de transportación más importantes, y a la misma vez, en el fortalecimiento de nuestros vecindarios. Nuestro plan para la comunidad del futuro afectará el tipo de vivienda disponible, transporte y acceso al empleo para todos.

Mientras las estrategias del proyecto son refinadas y entregadas a las personas responsables de tomar decisiones, necesitamos información de padres de familia como ustedes. ¿Las recomendaciones sobre viviendas en el futuro, empleo, desarrollo de urbanizaciones de uso mixto y terreno público apoyan a su vecindario y al bienestar de la comunidad en general? Para este otoño se han planeado una serie de eventos y reuniones para mantener a las personas informadas sobre el progreso del proyecto y también para recopilar comentarios sobre las nuevas recomendaciones.

**Calendario**

El calendario de Envision Eugene (Octubre-Diciembre) está publicado en el sitio Web. Visite nuestra página web a menudo, el calendario se actualizará cuando se agreguen eventos. Varias reuniones y eventos de puertas abiertas están planeadas para los meses de Noviembre y Diciembre a medida que avanzamos hacia decidir la cantidad de terreno que necesitaremos para empleos, viviendas, parques y escuelas.

**Evento de puertas abiertas en línea**

Este otoño, Envision Eugene va a intentar algo nuevo. Además de los eventos en persona, los eventos de puertas abiertas en línea estarán disponibles a través la página web de Envision Eugene. A partir del 1 de Noviembre, los visitantes de la página web podrán encontrar, en un solo lugar, videos, encuestas e información relacionada con un tema específico. ¡Perfecto para los padres ocupados! El primer evento de puertas abiertas en línea cubrirá las necesidades de terrenos públicos y viviendas y durará tres semanas. Más información acerca del segundo evento de puertas abierta en línea, el cual cubrirá las necesidades de terrenos industriales y estrategias para las renovaciones para uso mixto será publicada en Noviembre.

**Reuniones de grupos**

Los planificadores están disponibles a asistir a su grupo de padres de familia, consejo estudiantil u otras reuniones. Para solicitar un planificador, póngase en contacto con Terri Harding. Estaríamos encantados de asistir a su reunión ya sea de día o de noche y hablar sobre Envision Eugene. Presentaciones también pueden ser preparadas y presentadas. Puede encontrar presentaciones recientes en el sitio Web, y usted puede inscribirse para recibir el boletín electrónico mensual. ¡Gracias por leer!
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www.envisioneugene.org

2010 Envision Eugene Art Project at Family School
**Envision Eugene**

**October 2011 Parent News**

Envision Eugene is our community process for creating a vision for accommodating our future growth and a plan to get us there. Over the last 18 months, city staff has been working with the community to develop a draft proposal for the future, called *Envision Eugene: A Legacy of Livability*. You can download the proposal at [www.envisioneugene.org](http://www.envisioneugene.org). Key emphasis is placed on focusing new and redevelopment along major transportation corridors, along with strengthening our existing neighborhoods. Our future community plan will affect housing choice, transportation, and job access for everyone.

As the draft strategies are refined and brought to decision makers this fall, we need feedback from parents like you. Do the recommendations about future housing, jobs, mixed-use development, and public land support your neighborhood and the good of the community at large? This fall, a series of events and meetings are planned to keep people informed on the project progress, and to collect feedback on the emerging recommendations.

**Calendar**
The October-December Envision Eugene Calendar is now posted on the website. Check back often, as the calendar will be updated as events are added. Multiple meetings and open houses are planned for November and December as we move toward finalizing our land need for jobs, housing, parks and schools.

**On-line Open Houses**
This fall Envision Eugene will be trying something new. In addition to in-person events, on-line open houses will be available through the [Envision Eugene website](http://www.envisioneugene.org). Starting on November 1st, web visitors will be able to find videos, surveys, and information related to a specific topic, all in one place. Perfect for busy parents! The first on-line open house will cover housing and public land needs, and will run for three weeks. More about the second on-line open house, which will cover industrial land needs and mixed use redevelopment strategies, will be posted in November.

**Group Meetings**
Planners are available to come to your parent group, school council, or other meeting. To request a planner, contact Terri Harding. We’d be glad to attend your day or evening meeting and talk about Envision Eugene. Presentations can be prepared and given, too. You can find recent presentations on the website, and you can sign up to receive the monthly e-newsletter as well. Thanks for reading!

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[www.envisioneugene.org](http://www.envisioneugene.org)

2010 Envision Eugene Art Project at Family School
May 2012 News

Happy May! On April 17 we finished up our run of six community forums around the city at North Eugene High School. Complete notes and questions are posted on the website at www.envisioneugene.org. A Frequently Asked Questions document about the recommended UGB and growth strategies is coming soon.

If you missed the evening forums, you still have other options for learning about the Envision Eugene recommendation and providing your feedback:

1) You can come down to the Atrium Building or any of the three public libraries to view the full printed recommendation during normal business hours. The Atrium, located at 99 West 10th Avenue, also features a gallery-style display on the 2nd floor balconies, with posters and full size maps showing the recommended land for homes, jobs, schools, and parks.

2) Tomorrow, May 2nd, at the Atrium we are hosting a mid-day Mini-Forum, for people who couldn't make an evening meeting. This will be an informal time to discuss the recommendation with staff, look at the maps, and ask questions. Time is Noon-1 pm.

3) Our website features a flip-book version of the recommendation and links to all of the components, including the revised pillars, strategies, and actions, maps, and technical summaries.

Once you have had a chance to look through the recommendation, please take 10 minutes to fill out the on-line survey! The deadline has been extended to May 6th to get your response in. We want to hear from as many people as possible prior to the City Council hearing on May 14 and City Council work sessions beginning May 30.

View Calendar
View EE Videos
Recommendation Documents
Take the Survey

May Events

Daily - Atrium and public library Recommendation Displays
May 2 - Mini-Forum: Atrium Building
May 6 - Survey Deadline
May 14 - City Council Public Hearing
May 30 - CC Work Session
South Willamette Concept

This month we focus on the pilot study underway in the South Willamette District. One of the main components of the Envision Eugene Community Vision is the focus of new development and redevelopment on and near key transit corridors. South Willamette Street is one of those corridors, and the district around the street from 23rd to 32nd Avenues is already a great neighborhood. So when the Friendly Area Neighbors and SouthTown Business Association jointly asked the city to plan for an even more walkable urban shopping and living district, the timing was perfect to launch a pilot study to implement the emerging community vision through Area Planning.

Area Planning

“Area Planning,” as defined in the Envision Eugene recommendation, “considers all the features, natural and built, of special places along key transit corridors and in core commercial areas, to create a vision that fosters vital and sustainable redevelopment in areas with potential to become active centers for living, working, and shopping.”

Area planning is about making great places to live, work, shop, and enjoy ourselves in our community. The process considers all aspects of a district, and builds on its strengths, nurturing it toward an even more successful place for business and entertainment. The plan incorporates appealing places to live in a variety of housing types such as apartments, condos, row houses and cluster housing. Great places foster healthy, active lifestyles and businesses while accommodating our future growth. South Willamette is the first study area undergoing area planning in the context of Envision Eugene.

Urban Design Approach

The city is taking a collaborative design approach to area planning in South Willamette, involving a broad range of stakeholders from business owners, customers, neighbors, and city staff to designers, developers, and the general public. In June, the city held a design workshop to present and get feedback on a revised concept plan. The plan integrates places for denser urban housing, improved pedestrian connections and business opportunities, and urban form ideas related to building setbacks, step-backs and step-downs (see box). These urban design ideas helped refine and enable the vibrant business, entertainment and living areas for more urban lifestyles that the Envision Eugene pillars support near our key transit corridors.

Along with street-side character elements, these urban design concepts will be used to create a form based code that will shape future redevelopment in the South Willamette district. Workshop materials, public comments, and reports are available at www.eugene-or.gov/SWillamette.
Development Incentives

In order to realize the amount and type of redevelopment envisioned for Eugene’s future along corridors, the city will need to use a variety of development incentives. Programs being considered include revised Systems Development Charge (SDC) methodology; tax exemptions for denser urban housing; and public improvement projects such as street infrastructure or parking facilities. Streamlining development approvals through the use of a form-based code for desired development types is also an incentive.

Next Steps

You are invited to a Public Workshop on October 30th from 6:00-8:00 pm at Hilyard Community Center, 2580 Hilyard Street. In late November staff will present the plan to the Planning Commission. For details please visit www.eugene-or.gov/SWillamette or contact Project Manager Patricia Thomas at 541-682-5561 or patricia.thomas@ci.eugene.or.us.

In addition to the collaborative Area Planning happening in this district, Willamette Street itself is the subject of a design process being led by Public Works Engineering. The Willamette Street Improvement Plan will host a kickoff meeting November 13th at Roosevelt Middle School. Contact Chris Henry at chris.c.henry@ci.eugene.or.us for more information.

See complete Envision Eugene project information on the web. Visit www.envisioneugene.org for videos, recommendation documents, and information on other implementation projects. Like us on facebook, or send an email to envisioneugene@ci.eugene.or.us to sign up for monthly e-mail updates.
On June 13, 2012, the City Council directed staff to move forward with the formal adoption package necessary to implement Envision Eugene and a new Urban Growth Boundary (UGB). Since that time, staff have been making progress on the various components necessary to formally adopt a new UGB. This update provides a synopsis of efforts underway and their current status. For more information on the Envision Eugene Recommendation, visit www.envisioneugene.org

### Land for Industrial Jobs

**Brownfields project work:**

The City of Eugene, in Coalition with the City of Springfield and Lane County, was selected for a highly competitive Brownfield Inventory and Assessment Grant totaling $680,400. The City of Eugene, as lead grant recipient and program management agency, developed the work plan for the Brownfields Coalition Inventory and Assessment Project, which was approved by the Environmental Protection Agency (EPA) in late September. A Public Involvement Plan is being circulated to community partners, and a Request for Proposals has been issued for an environmental contractor to perform the work. A website for the project, www.brownfieldscoalition.org, contains a project video, a place to send comments or ask questions of staff, and basic information about the project. Coalition partners are currently forming an advisory Brownfields Task Force. The City is also planning to work with the University of Oregon Sustainable Cities Initiative on a Triple Bottom Line analysis tool to examine and prioritize eligible brownfield sites with participating property owners. Project Lead: Denny Braud, denny.braud@ci.eugene.or.us
UGB expansion analysis for industrial lands:

In June, the City Council directed staff to pursue analysis of a potential urban growth boundary (UGB) expansion area on Clear Lake Road for industrial land uses. Additional technical analysis of this area is currently underway, including an inventory of natural resources and a more detailed study of utilities and services. Draft results of the natural resources inventory are expected in December. Following completion of the natural resources inventory, the study area will be reviewed to ensure suitability for industrial uses and consistency with state law requirements for UGB expansions. Refined recommendations for an urban growth boundary expansion are expected to be presented to the Planning Commission and City Council this winter. Project Lead: Terri Harding, terri.l.harding@ci.eugene.or.us

Analysis of compatibility and environmental justice issues:

During council discussions of the Envision Eugene Recommendation, environmental justice issues were raised around the proximity of industrial and residential land uses. In particular, staff is beginning to analyze land use compatibility and public health issues in the area of the proposed industrial expansion. This work will include stakeholder interviews, data gathering and technical analysis, and potentially a staff and commissioner training, funded by Lane Livability Consortium. Following these tasks, draft recommendations will be developed for how to proceed, including a range of compatibility or mitigation measures to reduce potential environmental justice impacts. Project Lead: Terri Harding, terri.l.harding@ci.eugene.or.us

Land for Commercial Jobs and Multi-Family Homes

Industrial Re-designation/ Flexible Zoning:

The Envision Eugene proposal identifies opportunities to re-designate or add zoning flexibility to small and underutilized industrial lands that may be more suited to commercial type uses. Specific areas under study include the West 11th corridor and areas zoned for campus industrial (I-1) including the Chad Drive area and Greenhill Technology Park. Stakeholder interviews began in June 2012 and will continue through the end of the year. These interviews inform many aspects of the work, including the development of a range of implementation tools that will help achieve the desired goals. Property owners in the West Eugene study area were mailed a letter and map explaining the current

Area being considered for UGB expansion for industrial uses

West Eugene flexible zoning study area
study and an invitation to an open house that was held in West Eugene on December 10th. Additional letters and an open house for the I-1 study areas will follow in the New Year. Implementation concepts will be presented to the Planning Commission in January 2013. Following those work sessions, staff will invite feedback on revised implementation concepts from affected property owners and stakeholders. Project Lead: Terri Harding, terri.l.harding@ci.eugene.or.us

Code amendments that remove barriers to commercial and multi-family redevelopment activity:

Consistent with the Envision Eugene proposal, the goal of this package of code amendments is to make compact urban development easier in downtown, on key transit corridors, and in core commercial areas by removing code barriers to both commercial and residential redevelopment activity. Code concepts were developed based on public input received during the Envision Eugene process. Interviews with a wide variety of stakeholders were held in the fall to receive feedback on which proposed code concepts should go forward, and in what form. Following a work session with the Planning Commission in November to receive input on the code concepts, staff are preparing code language for public review and a formal adoption process. Project Lead: Alissa Hansen, alissa.h.hansen@ci.eugene.or.us

Incentives that promote desired commercial and multi-family redevelopment activity:

Proposed incentives include assessing the potential for restructured System Development Charges (SDCs), studying the feasibility of forming Compact Urban Development Districts, and exploring additional incentives such as infrastructure improvements, tax incentives, loan programs and public/private partnerships. An assessment of options for restructured SDCs began in September and will conclude with recommendations in February. These results will help inform a broader assessment of incentive options, including relative effectiveness, cost and potential priority areas and/or criteria for application. In-progress area planning for South Willamette will also provide a current case study to inform this assessment over the next few months. Project Lead: Robin Hostick, robin.a.hostick@ci.eugene.or.us
The South Willamette Concept Plan is a pilot project that explores important concepts of area planning. Two public events were convened – in June and October – to gather input on next steps for the South Willamette Concept Plan. A final draft plan will be complete in February. This pilot project explores important concepts of area planning, including creating a clear vision that also allows for flexibility; gradual implementation; and new tools to ensure compatible design. A framework to guide future area planning efforts is emerging from this and other work. For example, work is ramping up with partners to better understand – and take – important steps to planning successful transit corridors. Project Lead: Patricia Thomas, patricia.thomas@ci.eugene.or.us

Re-designation of the former Naval Reserve site to Medium Density Residential (MDR):

The Envision Eugene proposal identifies opportunities to re-designate selected areas that are more suitable for multi-family housing (such as Medium Density Residential) than the use for which they are currently designated. Specific areas identified to date include the former Naval Reserve site on 13th Avenue, east of Chambers Street. After completion of the Crow Road Study (see next page), staff will prepare an adoption package for re-designation of the former Naval Reserve site for public review and the formal adoption process. Project Lead: Heather O’Donnell, heather.m.odonnell@ci.eugene.or.us
Land for Single-Family Homes

Re-designation of sites to Low Density Residential (LDR):

The Envision Eugene proposal identifies opportunities to re-designate selected areas that are more suitable for single-family housing (Low Density Residential) than multi-family housing (Medium Density Residential). Specific areas include two north Eugene sites (about 19 acres total) and the majority of the 270 acre Crow Road Study Area in west Eugene. Additional areas may be identified. Staff has been focused on planning the Crow Road Study Area, including property owner outreach and meetings and development of a draft land use concept for the area. A questionnaire gathering feedback on the concept is currently out to affected property owners and residents. Next steps include refinement of the draft concept plan and implementation concepts. Following this work, the draft concept plan will be presented to the Planning Commission and the plan designation and zoning code revisions will be drafted for final public review in early 2013. Project Lead: Heather O’Donnell, heather.m.odonnell@ci.eugene.or.us

Incentives that promote secondary dwelling units and alley access lots:

The goal of these amendments is to expand housing variety and affordability by facilitating the building of smaller, compatible homes in single-family areas, and to help meet a portion of Eugene’s 20 year single-family housing need. These amendments implement strategies from the Envision Eugene proposal related to housing affordability and neighborhood livability. Specifically, these amendments are intended to allow the creation of alley access lots (lots that front an alley rather than a street) and compatible dwellings, promote the building of legal secondary dwelling units, and clarify the nature and use of accessory buildings. An advisory group composed of many members from the Infill Compatibility Standards committee on single-family housing is meeting to discuss potential code concepts. Following the advisory group’s work and Planning Commission’s feedback, code will be drafted for final public review in early 2013. Project Lead: Alissa Hansen, alissa.h.hansen@ci.eugene.or.us

Incentives that promote secondary dwelling units and alley access lots:

These are being explored as part of a comprehensive examination of incentives, described on page 3 under Incentives for Commercial and Multi-Family Redevelopment. For example, the study of SDC adjustments will assess the potential impact on various development types including secondary dwelling units. Incentives supporting alley access lots primarily include code amendments to allow these dwelling types in certain locations. Project Lead: Robin Hostick, robin.a.hostick@ci.eugene.or.us
UGB expansion analysis for single-family homes:

In June, the City Council directed staff to pursue analysis of additional locations as potential urban growth boundary (UGB) expansion areas for single-family housing. Additional technical analysis of these areas for housing is currently underway, including an inventory of natural resources and a more detailed study of utilities and services. Following recent court decisions about other jurisdictions’ efforts to expand their UGBs, staff is also working with the Department of Land Conservation and Development and key stakeholders to determine an approach for conducting the UGB expansion analysis consistent with state law and the recent court decisions. Draft results of the natural resources inventory are expected in December. Following completion of the natural resources inventory, the study areas will be reviewed to ensure suitability for housing and consistency with state law requirements for UGB expansions. Refined recommendations for an urban growth boundary expansion are expected to be presented to the Planning Commission and City Council this winter. Project Lead: Alissa Hansen, alissa.h.hansen@ci.eugene.or.us

Public Facility Services Plan and Transportation System Plan amendments:

As part of the adoption of a new UGB, these plans will need to be amended to ensure that the city’s wastewater, water, stormwater and transportation systems can support the planned densities and land use patterns of Envision Eugene. For the Public Facility and Services Plan (PFSP), this will include adoption of new/revised policies and projects regarding the provision of water, wastewater and stormwater to areas where additional growth is expected (both inside the current UGB, as well as expansion areas), and strategies to address timing and phasing of improvements to serve these areas. Regarding the Transportation System Plan (TSP), this will require adding new transportation projects or programs, making changes to allowed levels of service, and adding new policies necessary to support Envision Eugene implementation strategies. Throughout Envision Eugene, Planning staff have been coordinating with the Public Works Engineering and Transportation staff to ensure that our planning efforts are in alignment. Project Lead: Alissa Hansen, alissa.h.hansen@ci.eugene.or.us

Land for Public Uses

UGB expansion analysis for Bethel School District and Parks:

Similar to the potential industrial and residential UGB expansion areas, a natural resource inventory is underway for the school and park sites proposed to be included in the new UGB. Following completion of the natural resources inventory, the study areas will be reviewed to ensure suitability for school and park needs and consistency with state law requirements for UGB expansions. Currently, staff is working with Bethel School District to ensure that the district has an adequate school facilities plan (as required by state law). Any refined recommendations for an urban growth boundary expansion are expected to be presented to the Planning Commission and City Council this winter. Project Lead: Alissa Hansen, alissa.h.hansen@ci.eugene.or.us

UGB expansion analysis for the Eugene Airport:

In June, the City Council directed city staff to evaluate the possibility of expanding the UGB to include the Eugene Airport. While not required by the state, the city council determined that this was an appropriate time to explore the option. Staff is currently in the process of evaluating the implications of including the airport in the UGB, including impacts (both positive and negative) to the city, as well as the airport itself. An assessment report is expected to be completed this winter. Project Lead: Steve Nystrom, steve.a.nystrom@ci.eugene.or.us
Additional Tasks

**Buildable lands inventory update/ Technical wrap-up:**

The buildable lands inventory is currently being updated with more recent building permit information. The updated buildable lands inventory and updated capacity analysis will be presented to the Technical Resource Group for feedback this winter. Project Lead: Heather O’Donnell, heather.m.odonnell@ci.eugene.or.us

**Monitoring Plan:**

The Envision Eugene proposal includes creating an ongoing monitoring system to collect and track key information that will measure the accuracy of assumptions and the effectiveness of actions taken to accommodate Eugene’s future growth. Staff has been gathering information from different city divisions, other agencies, Technical Resource Group members, consultants, and other jurisdictions with monitoring systems. This information is helping to develop a monitoring system including an action plan, a list of variables to monitor, as well as methods and requirements for monitoring each variable. Continued informational meetings and research will refine these products and an update on these efforts will be presented to the Planning Commission for feedback this winter. Project Lead: Heather O’Donnell, heather.m.odonnell@ci.eugene.or.us

**Eugene-specific Comprehensive Plan:**

Eugene’s 20-year vision and policies will be contained in a new, Eugene-specific Comprehensive Plan based on the Envision Eugene Proposal. This document will address local needs as well as state legal requirements in a clear and accessible way. A conceptual outline has been prepared, including four main parts: a snapshot of current conditions, a set of regulatory goals and policies supporting the community vision, a non-regulatory “community design guide” that clearly illustrates the vision, and an action plan that spells out steps to achieving the vision over time. Elements of the Comprehensive Plan will be drafted and presented for review and discussion as technical work required for adoption nears completion. This work will also result in a revised Metro Plan which will be developed in conjunction with Springfield and Lane County. Project Lead: Robin Hostick, robin.a.hostick@ci.eugene.or.us

**Parcel-specific Plan Diagram:**

The current Metro Plan land use diagram is not parcel-specific in many cases. The goal is to create a city-wide, parcel-specific land use diagram (similar to the zoning map) that will be regularly updated to reflect re-designations. A parcel-specific map will give people more certainty about how land can be developed in the future as well as make it easier to monitor the Buildable Lands Inventory. Work has just begun on resolving the technological issues with creating this type of dynamic map. Following this work, the land use components of adopted plans and other historic documents will be researched and a draft parcel-specific plan diagram will be developed for feedback. Project Lead: Heather O’Donnell, heather.m.odonnell@ci.eugene.or.us

**Adoption Package Findings:**

The complete Envision Eugene adoption package will consist of all of the technical documents necessary to support Eugene’s 20 year land need and new UGB. This includes all of the technical work described above, as well as any associated Metro and refinement plan amendments, code amendments, zone changes and programs, and supporting documentation and analysis (including a Housing Needs Analysis and Economic Opportunity Analysis). Written findings demonstrating compliance with all relevant statewide planning
goals, statutes and rules, and local plans and code will accompany the adoption package. Staff are working on the findings where possible, but most of the work will occur once the technical components are completed. Project Lead: Alissa Hansen, alissa.h.hansen@ci.eugene.or.us

**Formal Adoption Process (Eugene, Lane County, State of Oregon):**

Notice was recently sent to the Department of Land Conservation and Development (DLCD) to officially notify them of our intent to start the formal adoption process establishing a Eugene-only UGB, and to establish the 20 year planning horizon for our local comprehensive plan. Staff is communicating regularly with our partners at DLCD, City of Springfield and Lane County to keep them up to date on our progress, and to discuss shared interests as it relates to UGB adoption. In late 2013, we plan to set the necessary joint planning commission and elected officials hearings and meetings to formally adopt Eugene's UGB, and associated plan amendments, code amendments and zone changes. Following this local process, the package will go through a state review and approval process. Project Lead: Alissa Hansen, alissa.h.hansen@ci.eugene.or.us

**For More Information:**

visit [www.envisioneugene.org](http://www.envisioneugene.org) or contact any of the staff listed above.
Residential Re-designation: The Crow Road Study Area

This month’s focus is on planning efforts currently underway in the Crow Road/W. 11th Avenue area. Eugene has a deficit of both Low Density Residential land (typically used for single-family housing) and Medium Density Residential land (typically used for multi-family housing) for the next 20 years of growth. To address this deficit, the Envision Eugene Recommendation identifies some areas in the urban growth boundary (UGB) for potential re-designation to accommodate more housing in the future. Of all the areas being studied, the Crow Road area is unique in providing an opportunity to update the long-range land use plan for a large, mostly undeveloped area that is within the UGB and which can provide a significant amount of housing to meet some of our 20-year needs.

The Land Use Concept

Developing a new long-range plan for the Crow Road area is timely. The previous long-range plan for this approximately 270 acre area was to develop with Medium Density Residential housing which would support a future industrial employment center north of W. 11th Avenue. Since then, conditions have changed, with much of the employment area now recognized as high value wetlands for protection or restoration through the West Eugene Wetlands Plan. More recently, the Envision Eugene Community Vision was developed, with a key theme of locating denser housing closer to transit and other commercial services (grocers, retail, restaurants, etc.) than where this area sits on the edge of town.

The key ingredient for the new long-range plan for the Crow Road area is Low Density Residential housing. Most of the medium density housing originally planned for this area will instead be encouraged along key transit corridors and in core commercial areas (see Autumn 2012 Envision Eugene newsletter). To make a complete neighborhood, the Crow Road concept also includes areas for some medium density housing, commercial services, potential parks and natural areas and a street and bicycle network.

Key Neighborhood Features

The land use plan is needed to comply with State regulations for adopting a new 20-year UGB, but the area’s country-like setting and large development potential also presents an opportunity for special measures that promote a less urbanized feel in future neighborhoods on this country/city edge. Suggested ways to implement this concept include:

• Make it easier to do clustered housing or larger residential lots that preserve more land for agriculture/livestock, tree preservation, or pastoral views
• Focus tree preservation efforts on key ridgelines, hillsides and groves, while allowing trees to be removed and replaced more easily elsewhere
• Make it easier to do agricultural/livestock related uses for home businesses in certain areas
• Consider building and street design elements that promote a less urbanized feel
Crow Road property owners and residents have contributed to the draft land use concept and neighborhood feature concepts through phone conversations, questionnaires, and public meetings. The 11/28/12 draft land use concept and suggested neighborhood concepts were presented at a November meeting. Area property owners and residents were mailed a questionnaire regarding these concepts, as well. Feedback to date indicates general support for the concept plan.

Next steps include final revisions to the concept plan, a Planning Commission work session, and preparation of the land use plan for formal adoption and re-designation of properties. Future work includes development and adoption of special standards for implementation tools for clustered housing, tree preservation and street design. For more information, go to www.envisioneugene.org > Implementation Projects > Residential Redesignation > More Single-family Housing > Crow Road Area.

In addition to the work underway in the Crow Road area, the city is also proposing redesignation of two sites in north Eugene, the old Naval Reserve site on West 13th Avenue, and potentially other sites to accommodate more homes inside the UGB.

See complete Envision Eugene project information on the web. Visit www.envisioneugene.org for videos, recommendation documents, and information on other implementation projects. Like us on Facebook, or send an email to envisioneugene@ci.eugene.or.us to sign up for monthly e-mail updates.
This month’s Spotlight focuses on the EWEB Riverfront Master Plan. The EWEB riverfront property was identified as a potential redevelopment site in the 2004 Downtown Plan, which includes policies, implementation strategies, and projects to establish an active, strong, and vibrant urban core connected to the river. With the relocation of EWEB operations to West Eugene, the site is ripe for a transformation from its industrial history to an opportunity area for jobs, housing, compact urban development, livable neighborhoods, recreation and natural resource enhancements, implementing many of the Envision Eugene Pillars.

**Visioning Process**

The EWEB riverfront property is uniquely located on the river in close proximity to the downtown core. Its high profile location, potential to create a strong connection between the downtown and river, and opportunity to contribute in new ways to Eugene’s identity caught the attention and imagination of hundreds of community members. Nine were appointed by the EWEB Board of Commissioners and City Council to serve on a Community Advisory Team (CAT) to guide the development of a master plan for the entire site. The CAT held over forty public meetings over the course of two years to establish a framework to guide future redevelopment.

In addition to the numerous public meetings needed to build a shared vision, a design charrette, stakeholder interviews, community presentations, and several workshops gathered critical feedback on different designs. Over a thousand community members dedicated their time and creative energy to this effort. The resulting master plan establishes a balanced framework of private redevelopment opportunities and new public open space, and the EWEB Board unanimously approved the document in June 2010.

**The Master Plan Concept**

The Master Plan envisions a green redevelopment of the property, with approximately eight acres of dedicated public open space, new construction and adaptive re-use of buildings, pedestrian-oriented streets connecting Downtown to the Willamette River, and a cultural landscape that displays the ecological, social, industrial, and civic history of the place. It establishes a framework of streets, including a ‘Great Loop’ that connects 8th and 5th Avenues through the property, identifies redevelopment parcels, and describes a set of allowable uses and land use requirements.
Implementation Tools

To implement the Master Plan vision, a new Specific Area Plan and Special Area Zone seek to create new residential capacity along key transit corridors and a mix of supporting neighborhood uses that complement downtown uses and are sensitive to the riparian environment. Key features of the proposed development code include:

• Customized development standards that enable the adaptive reuse of buildings, including the Steam Plant, Operations Warehouse, and Midgley’s building.
• Sustainable development strategies, including green streets, eco-roofs, and district energy systems.
• Policies and guidelines for riverfront park, open space, and cultural landscape area improvements.
• A form-based code that promotes a consistent and active street frontage and a pedestrian-friendly environment
• Parking standards that encourage underground, structured, or courtyard parking and discourage large surface lots.
• Street design requirements that include wide sidewalks, curb extensions, high-contrast crossings, and street trees.

A foundational underpinning to all these features is recognition of real constraints associated with urban redevelopment by balancing flexibility to allow new ideas to emerge with certainty around the types of uses allowed. Ultimately, a balanced, realistic and feasible redevelopment approach is desired to encourage transition of this property from its 100+ years of industrial history to a landmark mixed use destination.

Next steps include a Planning Commission public hearing and deliberation meetings. The City Council will hold its own meetings and hearings after the Planning Commission forwards a recommendation. For more information, go to [www.envisioneugene.org](http://www.envisioneugene.org) > Implementation Projects > Area Planning > EWEB Riverfront Master Plan.

Upcoming Planning Commission Meetings

• Tuesday, February 5 at 6 pm: EWEB Master Plan Hearing, Library Bascom-Tykeson Room
• Tuesday, February 19 at 11:30 am: EWEB Master Plan Deliberations, Atrium Sloat Room
• Monday, March 4 at 11:30 am: EWEB Master Plan Deliberations, Atrium Sloat Room

See complete Envision Eugene project information on the web. Visit [www.envisioneugene.org](http://www.envisioneugene.org) for videos, recommendation documents, and information on other implementation projects. Like us on facebook, or send an email to envisioneugene@ci.eugene.or.us to sign up for monthly e-mail updates.
Planning for Employment: Flexible Zoning

During the Envision Eugene visioning process, one of the most commonly suggested strategies to make better use of land inside the Urban Growth Boundary was to update our zoning code to be more flexible. This month’s Spotlight focuses on the work underway in West Eugene and Campus Industrial areas to encourage more employment opportunities and higher job density. Along with brownfield inventory and assessment work, redevelopment investment strategies, and UGB expansion for larger industrial uses, flexible zoning is a key strategy to implement the Economic Opportunity pillar.

West Eugene Study Area

Several areas in west Eugene were identified by the Envision Eugene Technical Resource Group (TRG) as having potential for mixed commercial and industrial job development. The goal of the West Eugene zoning study is to determine appropriate tools for the area to accommodate a larger portion of our commercial jobs, while also creating a successful mixed use corridor with coordinated land use and transportation plans. Based on this, staff created a study area map and reached out to the property owners and business tenants in the area. In addition to individual stakeholder interviews, an Open House was held on December 10, 2012, to share information and gather input.
From our outreach efforts in West Eugene, the following themes have emerged.

- More flexibility in the types of businesses allowed in the existing I-2 zone in West Eugene, especially for parcels fronting West 11th, Bertelsen, and other major roads.
- Keep the commercial-industrial zone concept, but remove limitations in the current C-4 zone. Patchwork zoning is a problem and should be cleaned up.
- Expand the types of uses allowed for some properties currently zoned I-3, or re-zone to commercial, while protecting existing industrial operations if zoning is changed.
- Expand the Whiteaker Special Area Zone or a similar zoning district further west into the study area.

The Planning Commission discussed the West Eugene zoning study on January 14th. View the webcast at www.eugene-or.gov.pc.

**Campus Industrial Study Areas**

Properties in the I-1 Campus Industrial zone were also identified as having potential for additional employment opportunities. The study areas include property on Chad Drive, Greenhill Technology Park on West 11th, and the Hynix/Willow Creek Circle properties. Limitations on the types of allowable businesses, the size of parcels and tenant spaces, and the proportion of supporting commercial uses have all been mentioned as barriers to development of this land.

The City wants to respond to property owner interest in allowing a broader range of businesses and flexible employment uses, while still maintaining the areas’ purpose as employment centers and not general retail centers. It is also vitally important to protect the present and future operations of existing businesses in these areas. Adding zoning flexibility could help businesses expand or adjust to future market conditions.

Next steps include an Open House on March 4th and a Planning Commission work session on March 25th. The City Council will hold a work session on employment strategies inside the UGB in April. For more information, go to www.envisioneugene.org > Implementation Projects > Economic Development Strategies.

**Upcoming Meetings on Envision Eugene**

- Monday March 4th at 4-6 pm: I-1 Zone Open House, Oregon Community Credit Union Headquarters, 2880 Chad Drive
- Monday March 11th at 11:30 am: Planning Commission meeting on South Willamette Concept Plan, Atrium Sloat Room, 99 West 10th Avenue
- Monday March 25th at 11:30 am: Planning Commission meeting on I-1 Zone, Atrium Sloat Room, 99 West 10th Avenue

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South Willamette Concept Plan

The Envision Eugene vision is taking shape in the South Willamette district. The street design study has been in the news recently, and the Concept Plan for the district is now being finalized! In March, the final draft Concept Plan, the vision for guiding change in the area – from 23rd to 32nd Avenues and from the base of College Hill to Amazon Park – was published, incorporating hundreds of ideas from community members into an integrated vision for future development.

As part of Envision Eugene, the plan implements many of the pillars and strategies to make a great place for living, working, doing business, shopping and relaxing. The full concept plan is available on the city website here.

The plan reinforces existing patterns, supporting a vital commercial area that evolves over time to a more walkable shopping and business district. An important element of the plan is a richer range of housing types to accommodate residential growth in the district with more types of housing for all income levels.

The vision is based on carefully considered building types, heights and transitions that introduce more urban building forms while addressing important community values about scale and compatibility. The vision also emphasizes the connection between safe and walkable neighborhood streets to open spaces such as Amazon Park.

Over 600 people have been involved through public workshops, online presentations, surveys, focus groups, or email communication. Two events in April are planned to foster public dialogue and gather feedback on the plan.

April 4: Open House with Eugene Planning Commissioners

The open house will feature illustrations of the plan for public review. Planning Commissioners will be available to talk with community members and hear comments about the Concept Plan. 6-8 pm, Hilyard Community Center.

April 15: Planning Commission Meeting

Planning Commissioners will review and be asked to modify or accept the South Willamette Concept Plan. 11:30 am, Atrium Sloat Room.

Following the April meetings, the City Council will have an opportunity to review and discuss the plan. Implementation steps will follow, including a community investment program to catalyze implementation of the vision.

The process of re-designing and constructing South Willamette Street continues as well. In February a public meeting drew 300+ people to talk about their hopes for the street. Six alternative designs were presented and discussed. In March, the alternatives were narrowed down to three. See them here: www.eugene-or.gov/SWillametteStreet.
Another project underway to implement Envision Eugene is aligning the land use code regulations to support implementation. Over the past several years, various City codes have been identified as barriers to mixed use development and projects in the downtown area. A short list of code changes (amendments) has been prepared and is being shared with stakeholders this spring. The goal of these amendments is to facilitate several Envision Eugene strategies including compact urban development in downtown, on key transit corridors, and in core commercial areas.

Revisions are planned for the following code sections to make it easier to do mixed use and downtown development projects:

- Housing in Commercial Zones
- Transportation Impact Analysis in Downtown
- Surface Parking Limitation in C-3 Zone
- Large Commercial Facilities Standards for Projects in Downtown
- Nodal Development (/ND) Overlay Zone (in addition to the recent amendment for drive-throughs)
- Transit Oriented Development (/TD) Overlay Zone (minor changes to reflect /ND changes)
- Commercial Landscaping Standards

Next steps include a Planning Commission work session on April 22nd and a public hearing on May 7th. The City Council will hold its own hearing this summer before taking action on the amendments. For more information, go to www.envisioneugene.org > Implementation Projects > Land Use Code Amendments

**Upcoming Meetings on Envision Eugene**

- April 4th at 6-8 pm: South Willamette Concept Plan Open House, Hilyard Community Center, 2580 Hilyard
- April 8th at 11:30 am: Planning Commission on Employment Strategies/Flexible Zoning, Atrium Sloat Room, 99 West 10th Avenue
- April 15th at 11:30 am: Planning Commission on South Willamette Concept Plan, Sloat Room
- April 17th at Noon: City Council on MUPTE Program, Harris Hall, 125 E. 8th Avenue
- April 22nd at 11:30 am: Planning Commission on Mixed Use/Downtown Code Amendments, Sloat Room
- April 24th at 5:30 pm: Sustainable Transportation Planning lecture with Jeff Tumlin, Downtown Library Bascom-Tykeson Room, 100 West 10th Avenue

(See book cover at right)
Single Family Housing

To implement Envision Eugene's Housing Affordability and Livability Pillars, work is under way to introduce a greater variety of single family housing types into our community. One strategy includes promoting the construction of secondary dwelling units (sometimes referred to as granny flats or mother-in-law units) and alley access housing throughout the city, along with design standards to ensure the new homes fit with the neighborhood.

Another strategy involves the creation of new tools to promote the construction of attached and clustered housing types in certain areas. Smaller, more compact forms of single family housing can fill a gap in Eugene’s current housing supply for single person households, couples and small families, while taking advantage of existing infrastructure and enhancing the character of existing neighborhoods.

These strategies help accommodate a portion of the city’s 20 year need for single family housing, and minimize the need for urban growth boundary expansion.

Secondary Dwelling Units and Alley Housing

Building on the work of the Infill Compatibility Standards project, land use code revisions are planned to promote secondary dwelling units by improving compatibility, and clarifying ownership and occupancy requirements. A separate but related project is underway to study the possibility of restructuring the system development charges for such dwellings.

Land use code revisions are also planned to clarify the distinction between accessory structures, such as garages and shops, and primary or secondary dwellings, while promoting compatibility.

Work is also underway to allow for alley housing that would be built on lots created off alleys in the R-1 Low Density Residential zone. These code revisions will include standards to promote compatibility, such as maximum building size and height requirements, sloped building setbacks and parking and driveway requirements. In 2009, alley lots were included in the new Jefferson-Westside Special Area Zone, along with design standards. Consistent with the Infill Compatibility Standards process, one of the goals of all three of these amendments is to reduce negative impacts to neighborhoods while allowing compatible infill.

Next steps include a Planning Commission work session on June 10 and an Open House on a date to be announced soon. For more information, go to www.envisioneugene.org > Implementation Projects > Land Use Code Amendments.
Single Family Options Zone

Land use code revisions are also being planned to make it easier to develop a variety of compact single family housing types in the R-1 Low Density Residential zone. This idea is being piloted in the South Willamette area through the Draft Concept Plan. In this already developed part of the city, compact housing options can make it easier to provide housing types that fit into the existing neighborhood fabric. Housing types under consideration include row houses, courtyard houses and cottage clusters, which will be guided by a new zoning district that emphasizes building form, and that can be applied to other locations in the city, as appropriate.

The clustered housing concept is also being considered in the Crow Road Re-designation Study. This area is being studied for re-designation to provide Low Density Residential land in the future instead of the Medium Density Residential (typically multi-family housing) that it is currently called for in the city’s long range plan (the Metro Plan). Potential Crow Road zoning tools will aim to implement a less urban feel as the area develops in the future. In this largely undeveloped area on the edge of the city, clustered housing is a tool that can help preserve open space areas for farming, livestock or other common uses. The Crow Road single family options zone may have further applicability in other semi-rural parts of Eugene, such as River Road and Laurel Hill Valley, in the future.

Upcoming Meetings on Envision Eugene

Planning Commission meets in the Atrium Sloat Room, 99 West 10th Avenue.
City Council meets at Harris Hall, 125 East 8th Avenue.

- May 13th at 11:30: Planning Commission on Community Investment Strategies
- May 13th at 5:30: City Council on Multiple Unit Property Tax Exemption (MUPTE) Program
- May 14th at 6 pm: Planning Commission hearings on Downtown /Mixed Use Development and Storm Water Code Amendments
- May 15th at noon: City Council on EWEB Master Plan
- May 22th at noon: City Council on MUPTE Program

TBA: Open House for Secondary Dwelling Units and Alley Access Lots

See complete Envision Eugene project information on the web. Visit www.envisioneugene.org for videos, recommendation documents, and information on other implementation projects. Like us on facebook, or send an email to envisioneugene@ci.eugene.or.us to sign up for monthly e-mail updates.
Planning Commission Meetings on Envision Eugene

Meetings are held at 11:30 am in the Atrium Sloat Room at 99 West 10th Avenue, unless otherwise noted

10/14/2013    Single Family Code Amendments Deliberations
10/15/2013    Metro Plan Chapter IV Process Amendments
10/21/2013    Single Family Code Amendments Deliberations
10/28/2013    Employment Zoning Code Amendments Work Session

The Single Family code amendments propose the following:

- add compatibility standards for secondary dwellings, alley access lots and accessory buildings citywide,
- allow for new alley access lots in certain areas, and
- provide interim protection measures in the Amazon, Fairmount and South University neighborhoods to prohibit certain dwelling types and land divisions, and limit certain uses until more comprehensive planning of these areas can be completed.

The Metro Plan process amendments clarify the decision making process for amendments to the Metro Plan. This meeting is a joint work session and public hearing with Springfield and Lane County Planning Commissions, and will be held in the Springfield Library Meeting Room at 225 Fifth St, Springfield, at 5:30 pm on October 15th.

The Employment zoning code amendments affect industrial land in West Eugene, along Chad Drive, and in the I-2 and I-3 zones citywide. New maps and information related to the proposed Employment Zoning have been posted on the web at www.envisioneugene.org.

Meeting materials are generally available 5-7 days before the meeting on the Planning Commission’s agenda page.

Video of Planning Commission meetings is broadcast on Metro Television cable channel 21 and webcast are available after the meeting through the city’s website.

City Council Meetings on Envision Eugene

Meetings are held at Harris Hall, Lane County Public Service Building, 125 E. 8th Avenue
Meeting materials are available the week before the meeting on the Council meetings webpage. Video of City Council meetings is broadcast on Metro Television cable channel 21 and webcast are available after the meeting through the city's website.

Thank you for your interest in building Eugene's future.

Terri Harding, AICP
Senior Planner
City of Eugene Planning Division
(541) 682-5635

www.envisioneugene.org

*Just let me know if you would like to be removed from this mailing list*
Envision Eugene is our community vision for accommodating the next 20 years of growth. The City is planning for up to 34,000 more residents and 37,000 more jobs over that timeframe. In 2010, the City began working with the community to develop a vision for Eugene’s future. In March 2012, *Envision Eugene: A Community Vision for 2032* was released, and in June 2012, the Eugene City Council directed staff to begin the process of plan adoption.

The Community Vision includes seven pillars or community goals, and strategies to turn the vision into reality. The seven pillars focus on:

- economic opportunity
- affordable housing
- climate change and energy resiliency
- compact development and efficient transportation
- neighborhood livability
- natural resources
- flexible implementation

A main theme of the vision is concentrating new growth along and near our key transit corridors and core commercial areas while protecting neighborhoods and increasing access to services for everyone. All areas of the City will continue to accommodate infill on vacant and underutilized pieces of property. The Urban Growth Boundary will only need to be expanded for a portion of our single family housing needs - less than 10% – and larger industrial uses. Commercial services and multi-family housing will be accommodated inside the existing boundary.

Throughout 2013, City staff will bring three main topics forward for community, Planning Commission and City Council discussion:

- **Community Investment Program** - city actions necessary to close the market gap for desired compact development and economic prosperity put forth in the vision
- **Efficiency Measures** - land use code amendments, plan designation changes, and zone changes to use land more efficiently inside the current growth boundary
- **Urban Growth Boundary Expansion** - detailed analysis of the areas that best meet our needs within the parameters set by the statewide land use system.

Vision documents and maps, project newsletters and updates, videos, and presentations are available on the website at [www.envisioneugene.org](http://www.envisioneugene.org). Sign up for the e-newsletter, or find us on Facebook. Learn about coordination with the Eugene Transportation System Plan at [www.EugeneTSP.org](http://www.EugeneTSP.org). To learn even more, contact Terri Harding at (541) 682-5635 or terri.l.harding@ci.eugene.or.us.
October 14, 2014

Envision Eugene Interested Parties,

Last month you received a detailed update on the status of Envision Eugene related work products. We want to make you aware of the schedule moving forward through the end of 2014 and early 2015, with important dates to mark on your calendar.

### Efficiency Measures: Multiple Unit Property Tax Exemption (MUPTE) Program Revisions

<table>
<thead>
<tr>
<th>Date</th>
<th>Event Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>October 15</td>
<td>City Council Work Session</td>
<td>Harris Hall, Noon</td>
</tr>
<tr>
<td>November 17</td>
<td>City Council Public Hearing</td>
<td>Harris Hall, 7:30 pm</td>
</tr>
<tr>
<td>November 19</td>
<td>City Council Action</td>
<td>Harris Hall, Noon</td>
</tr>
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### Jobs, Parks & Schools UGB Expansion Analysis

<table>
<thead>
<tr>
<th>Date</th>
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</tr>
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<tbody>
<tr>
<td>October 27</td>
<td>Planning Commission Work Session</td>
<td>Atrium Sloat Room, 11:30 am</td>
</tr>
<tr>
<td>November 3</td>
<td>Planning Commission Work Session</td>
<td>Atrium Sloat Room, 11:30 am</td>
</tr>
<tr>
<td>November 26</td>
<td>City Council Work Session (Preliminary Recommendation)¹</td>
<td>Harris Hall, Noon</td>
</tr>
<tr>
<td>December 11</td>
<td>On-line Open House begins</td>
<td>continues through January</td>
</tr>
<tr>
<td>January 13</td>
<td>Open House</td>
<td>time and location to TBD</td>
</tr>
<tr>
<td>January 20</td>
<td>City Council Public Forum²</td>
<td>Harris Hall, 7:30 pm</td>
</tr>
<tr>
<td>January 28</td>
<td>City Council Work Session and Direction to Staff</td>
<td>Harris Hall, Noon</td>
</tr>
<tr>
<td>Feb-March</td>
<td>Formal Adoption Process³</td>
<td>dates, times and location TBD</td>
</tr>
</tbody>
</table>

### Residential Lands UGB Expansion Analysis

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<thead>
<tr>
<th>Date</th>
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<th>Location</th>
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<tbody>
<tr>
<td>November 24</td>
<td>Planning Commission Work Session</td>
<td>Atrium Sloat Room, 11:30 am</td>
</tr>
<tr>
<td>December 1</td>
<td>Planning Commission Work Session</td>
<td>Atrium Sloat Room, 11:30 am</td>
</tr>
<tr>
<td>December 10</td>
<td>City Council Work Session (Preliminary Recommendation)¹</td>
<td>Harris Hall, Noon</td>
</tr>
<tr>
<td>December 11</td>
<td>On-line Open House begins</td>
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</tr>
</tbody>
</table>

*Please be advised that these dates are subject to change (we will provide updates, but it’s also a good idea to check the website for the most up to date meeting schedules).*

¹ The Preliminary Recommendation from staff will be presented, but no action will be requested on this date.
² The Public Forum scheduled for January 20th is an opportunity for community members to express their opinions to the City Council, prior to the Council directing staff to move forward with the formal adoption process.
³ The formal adoption process will include public hearings and a recommendation from the Planning Commissions of both Eugene and Springfield and public hearings and adoption by both the Eugene City Council and Lane County Board of Commissioners.
In addition to the meetings listed above, staff will continue to work with a variety of community members, including Planning Commission subcommittees, the Technical Resource Group, property owners, neighbors and others, to help refine the recommendations. An open house is being planned for January 13, in advance of the January 20 Public Forum to help inform the public about the preliminary recommendations. An on-line open house will also be available via the website beginning in early December.

Much has been accomplished and we are drawing nearer to the conclusion of this first phase of work which will result in a new Urban Growth Boundary (UGB) and a Comprehensive Land Use Plan for Eugene. Thanks for your continued interest in Envision Eugene. Let us know if you have questions or would like to discuss anything further.

Sincerely,

Carolyn Burke, Principal Planner, and the Envision Eugene Team
Carolyn.j.burke@ci.eugene.or.us
Envision Eugene is our community's vision for our city's future and how we will grow while preserving what we love about our community.

Envision Eugene Newsletter

What's New with Envision Eugene?

This newsletter provides a couple of reminders about upcoming Envision Eugene events, including a council work session on July 20th. We have also included a link to our new Envision Eugene video. You can always get the latest information at the Envision Eugene website - [www.EnvisionEugene.org](http://www.EnvisionEugene.org).

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Check out this video about the next steps in adopting Eugene's own urban growth boundary. When you are done, share it with your friends!

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On July 20 City Council will discuss strategies to meet Eugene's need for multi-family housing over the next 20 years. Most of Eugene's future housing can fit on land that is within our current UGB. There is still a need, however, to find space for about 1,600 multi-family homes.

At their work session Council will receive an overview of the options for accommodating Eugene's multi-family housing need and discuss which options to further study. The options selected by Council will be taken out to the community over the summer and fall to get feedback from the public. Learn more by viewing the Council memo [here](http://myemail.constantcontact.com/Your-Envision-Eugene-Newsletter.html?soid=1123418754250&aid=wdzKq7EQ-JY) and view the multifamily options page [here](http://myemail.constantcontact.com/Your-Envision-Eugene-Newsletter.html?soid=1123418754250&aid=wdzKq7EQ-JY).

The Council work session will be at noon on July 20 in Harris Hall, at 125 E. 8th Avenue. You can watch the work session live or later on the City's [webcast](http://myemail.constantcontact.com/Your-Envision-Eugene-Newsletter.html?soid=1123418754250&aid=wdzKq7EQ-JY). The Council agenda and meeting materials will be available [online](http://myemail.constantcontact.com/Your-Envision-Eugene-Newsletter.html?soid=1123418754250&aid=wdzKq7EQ-JY) starting July 15.

**Reminder: See You This Summer!**

**First Event:  TODAY in Willakenzie Park, 5:30-7:30 pm**

Envision Eugene will be coming to events near you this summer! Beginning in July, the Envision Eugene Team will be hosting a booth at community events throughout the City including several of the [Party in the Parks](http://myemail.constantcontact.com/Your-Envision-Eugene-Newsletter.html?soid=1123418754250&aid=wdzKq7EQ-JY), [Sunday Streets](http://myemail.constantcontact.com/Your-Envision-Eugene-Newsletter.html?soid=1123418754250&aid=wdzKq7EQ-JY), and at [First Friday](http://myemail.constantcontact.com/Your-Envision-Eugene-Newsletter.html?soid=1123418754250&aid=wdzKq7EQ-JY) in downtown.
In addition to fun freebies, maps, and a "Love Your 'Hood" activity, this will be an opportunity to share information about our proposed new UGB and let people know how they can give their input.

Upcoming Events:
Thursday July 14th, 5:30 - 7:30 pm - Party in the Park (Willakenzie Park)
Tuesday July 19th, 5:30 - 7:30 pm - Party in the Park (Churchill Park)

Stay tuned for more events throughout the summer where you will see the Envision Eugene booth! Go to Get Involved! for the latest information.

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Confirm that you like this.

Click the "Like" button.
Envision Eugene Newsletter

What's New with Envision Eugene?

This week's newsletter provides a couple of reminders about upcoming Envision Eugene events, including the Council work session tomorrow (July 20th). Stay tuned to your Envision Eugene Newsletter next week, which will be packed full of information about multi-family housing. You can always get the latest information at the Envision Eugene website - www.EnvisionEugene.org.

TOMORROW: Council Work Session
As noted in previous newsletters, this Wednesday, July 20th, Council will discuss strategies to meet Eugene's need for multi-family housing over the next 20 years. We anticipate that Council will give the Envision Eugene Team direction on how to proceed with public outreach this summer on options for accommodating our multi-family housing needs. To learn more you can read the work session materials [here](http://myemail.constantcontact.com/Your-Envision-Eugene-Newsletter.html?soid=1123418754250&aid=U45w6hkddf4) and view additional materials on the multi-family housing page [here](http://myemail.constantcontact.com/Your-Envision-Eugene-Newsletter.html?soid=1123418754250&aid=U45w6hkddf4).

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**Community Outreach**

**TONIGHT: Churchill Park, 5:30-7:30 pm**

Last week we saw about 40 of you stop by our booth at the Willakenzie Party in the Park. We learned from you about your 20 minute neighborhood, what you love most and what could be made better. We also shared updates on Envision Eugene, our urban growth boundary and upcoming opportunities to get involved.


**Upcoming Events:**

**Tuesday July 19th**, 5:30 - 7:30 pm - Party in the Park (Churchill Park)
Sunday July 31st, noon - 4pm - Sunday Streets (The Park Blocks - Downtown)
Sunday July 31st, 5:00 - 8:00 pm - Friendly Area Neighbors (Washington Park)

Stay tuned for more events throughout the summer where you will see the Envision Eugene booth! Go to [Get Involved](http://myemail.constantcontact.com/Your-Envision-Eugene-Newsletter.html?soid=1123418754250&aid=U45w6hkddf4) for the latest information.
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Envision Eugene Newsletter

What's New with Envision Eugene?

This newsletter provides a brief update on the July 20th City Council work session, and reminders about upcoming Envision Eugene events. You can always get the latest information at the Envision Eugene website - www.EnvisionEugene.org.

July 20th Council Work Session Update

On July 20th, the Eugene City Council passed two motions related to Envision Eugene.

The first motion was “direct staff to focus on tier one strategies, but accepting comments on tier two
strategies and a higher density strategy along transit corridors for accommodating multi-family housing, as outlined in Attachment C, for further development and public engagement."

The second motion was “direct staff to move forward with public engagement activities for the UGB adoption package as described in Attachment E.”

Our planners are developing materials to implement this City Council direction and to get community feedback on how to accommodate multi-family housing. Stay tuned!

Community Outreach

Envision Eugene continues community outreach over the summer. The Envision Eugene Team will be hosting a booth at community events throughout the City including several of the Party in the Parks, Sunday Streets, and at First Friday in downtown.

In addition to fun freebies, maps, and a "Love Your 'Hood" activity, this will be an opportunity to share information about our proposed new UGB and let people know how they can give their input.

Upcoming Events:
Sunday July 31st 12 - 4 pm -  Sunday Streets (Downtown - Park Blocks)
Sunday July 31st, 5 - 8 pm - Friendly Area Neighbors Picnic (Washington Park)

Stay tuned for more events throughout the summer where you will see the Envision Eugene booth!

Go to Get Involved! for the latest information

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Envision Eugene Newsletter

What's New with Envision Eugene?

August 5, 2016

This week's newsletter focuses on upcoming meetings and events. Next week, we will focus on getting your feedback on our multi-family housing options. You can always get the latest information at the Envision Eugene website - www.EnvisionEugene.org.
Monday, August 8 - Planning Commission
Envision Eugene Project Update

The Envision Eugene team will present a project update to the Planning Commission on Monday, August 8. At this work session, the Planning Commission will have the opportunity to learn about and discuss the latest information, including the City Council's direction for which housing strategies to move forward for further work, public review and comment. The Planning Commission will also have the opportunity to discuss and comment on the proposed public engagement plan for getting community feedback on the housing strategies.

Meeting Details:
Monday, August 8
11:30 am - 1:30 pm
Atrium Building
99 W. 10th Avenue
Sloat Room

Community Outreach

TONIGHT: First Friday Artwalk,
Kesey Square, Downtown, 5:30 - 8 pm

Thanks to the approximately 50 people who stopped by our booth at the Churchill Party in the Parks on July 19th. We learned from you about your neighborhoods, what you love most and what could be made better, such as loving your parks and wanting more of them. We also talked about what makes a 20-minute neighborhood and shared updates on Envision Eugene, our urban
growth boundary and upcoming opportunities to get involved.

Then, we talked with dozens of you at Sunday Streets downtown and dozens more at the Friendly Area Neighbors Picnic at Washington Park. Summer in Eugene is in full swing and we are grateful for the opportunity to see how it takes shape around the city. Everything we hear is being catalogued, and will be summarized for the community and the City Council at the end of September.

Come say hello at upcoming Party in the Parks, Sunday Streets, and First Fridays downtown.

Upcoming Events:

Friday August 5th, 5:30 - 8pm - First Friday Art Walk (Kesey Square)
Tuesday August 9th, 5:00-8pm - Party in the Parks (Bethel Community Park)
Thursday August 11th, 5:00-7:30pm - Bethel Family Fun Night (Petersen Barn)

Stay tuned for more events throughout the summer where you will see the Envision Eugene booth! Go to Get Involved! for the latest information.

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Envision Eugene Newsletter

What's New with Envision Eugene?
August 9, 2016

This week's newsletter focuses on requesting your feedback on multi-family housing strategies, area planning, and key corridors, and reminders about upcoming Envision Eugene events. You can always get the latest information at the Envision Eugene website.

www.envisioneugene.org

Tell us what you think!
Multi-family Housing Options

The City is asking the community for feedback on several options to meet our multi-family housing needs over the next 20 years. Most of our future housing can fit on land that is within our current urban growth boundary. There is still a need, however, to find space for about 1,600 multi-family homes. Check out this infographic that explains how we arrived at this number.

There are many options for addressing these housing needs and now is the time to give us your feedback on the potential strategies. The strategies have been grouped into three tiers based on feasibility. Some of these options can be implemented sooner, while others would require more analysis and community feedback, which would slow down adoption of the urban growth boundary. Learn more on our multi-family options page or click on the multi-family housing video link above.

City Council will decide which strategies to adopt in the fall and your feedback will help inform the Council’s decision. The City Council specifically asked for input on a handful of the possible options, including the strategy to increase housing densities along our key transportation corridors and core commercial areas (see more under Area Planning below).

After you've learned more about these strategies, let us know what you think. Visit the Get Involved! page to learn more and click on the link below to take the multi-family housing questionnaire, which is full of links to informational materials.

Take the Questionnaire!

Area Planning, Key Corridors and the UGB
At their July 20th work session, the City Council asked for public input on the idea of adding housing along our "key corridors." This idea is a central growth management principle in Eugene that we are committed to doing through area planning to address neighborhood livability and compact development goals. In order to do that we need to adopt development incentives (like the multiple unit property tax exemption - MUPTE) ahead of, or at the same time as adopting the UGB.

If other strategies to accommodate the 1,600 homes are selected, area planning along key corridors could still be done as time and resources allow and as conditions in different parts of town warrant.

What do you think about these strategies? Should we pursue one or more of the Tier 1 options, and move forward with adopting our UGB soon? Or, should we take more time and pursue increasing density along key corridors? Our questionnaire will ask you these questions and more.

Learn more about area planning by viewing the fact sheet below.

Area Planning Fact Sheet

Community Outreach

The Envision Eugene Team was at the First Friday Art Walk in Downtown Eugene last week. At our fifth community event of the summer, we heard from nearly 30 members of the public. Not surprisingly, given the location of the event, we heard concerns about gentrification and homelessness downtown as well as access to public transportation.

Come say "hello" at one of the upcoming Party in the Parks, Sunday Streets, or First Fridays.
Tonight: 5-7:30 pm - Party in the Parks (Bethel Community Park)

Other Upcoming Events:
Thursday August 11th, 5:00-7:30pm - Bethel Family Fun Night (Petersen Barn)
Tuesday August 16th, 5:00-7:30pm - Party in the Parks (Awbrey Community Park)

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Envision Eugene is our collective vision for how we will grow while preserving what we love about our community.

Envision Eugene Newsletter

What's New with Envision Eugene?
August 16, 2016

Each of these newsletters focuses on a different piece of adopting our own urban growth boundary (UGB). Over the past few weeks we zeroed in on multi-family housing as the remaining piece to be figured out before we adopt our own UGB. This week we take a step back and look at housing more generally. We've included a reminder about the multi-family questionnaire and information about upcoming community events, where you can chat with us about Envision Eugene! You can always get the latest information at the Envision Eugene website.

www.envisioneugene.org

Housing Snapshot
The above image is clipped from our Housing Affordability Snapshot. Click on the image or the link below for the full infographic.

We are planning for 34,000 new Eugeneans by 2032. According to our estimates, Eugene's population in 2032 will be more ethnically diverse and we will have more people 65 years and older. We will also continue to have smaller than average households as well as a high college-age population. These trends are explained in detail in our Population and Demographics Factsheet.

These figures and trends have implications on our housing needs and the types of housing we should plan for. Our Housing Mix Factsheet explains how we determined the number of single family homes and multi-family homes we are planning for.

There are many trends and statistics that help us plan for our future housing needs and our goal of providing housing affordable for everyone. Check out our Housing Affordability Snapshot, which includes key information related to the Envision Eugene Housing Affordability pillar.

Housing Affordability Snapshot

The housing page on our website includes all of this information, documents and more. Check it out!

Reminder: Multi-family Questionnaire
Check out the multi-family video we released last week (above) and take the multi-family questionnaire (below). Pass it on!

Take the Questionnaire!

Community Outreach

Last week the Envision Eugene Team was in Bethel twice! On Tuesday we attended Party in the Park at Bethel Community Park and Thursday we attended Family Fun Night at Petersen Barn. We heard from residents about the important role parks, rec centers and pools play in their lives. We also heard a strong desire for more commercial development (stores and restaurants) and better bike and transit connections.

Come say “hello” at one of the upcoming Party in the Parks, Sunday Streets, or First Fridays. We’ll be at these events until the end of September!

**Tonight: 5:30-7:30pm - Party in the Parks (Awbrey Park)**

**Other Upcoming Events:**

- August 21, 1-3 pm, River Road Community Org. Picnic (Emerald Park)
- September 2, 5:30-8 pm, First Friday Art Walk (Downtown)
- September 10, 11 am - 3 pm, South East Neighbors Picnic (Tugman Park)

Stay tuned for more events throughout the summer where you can visit the Envision Eugene booth! Go to Get Involved! for the latest information.

To subscribe to Envision Eugene, email envisioneugene@ci.eugene.or.us and tell us you would like to receive our emails. Thanks for your interest, and as always, please let us know if we can answer any questions about Envision Eugene.
Confirm that you like this.

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Envision Eugene Newsletter

What's New with Envision Eugene?
August 26, 2016

This week's newsletter focuses on one of the key components of adopting our urban growth boundary (UGB), the new, Eugene-specific comprehensive plan. We've got a video, a questionnaire and another fact sheet for you this week, in addition to a reminder about upcoming community events where you can chat with the Envision Eugene Team. You can always visit our website for the latest information.

www.envisioneugene.org

Adopting Our Own Urban Growth Boundary
Until now, Eugene and Springfield have shared both a UGB and a comprehensive plan through the Eugene-Springfield Metropolitan Area General Plan (Metro Plan). As part of Envision Eugene, we will adopt our first ever Eugene-specific UGB and comprehensive plan, which will allow us to manage growth in a way that is reflective of Eugene’s community values.

Our new UGB will be independent from Springfield’s UGB and will include two expansion areas: one in the Clear Lake Area and one in the Santa Clara Neighborhood. These expansions will be the focus of upcoming newsletters.

This week we are focusing on the Envision Eugene Comprehensive Plan and the role it plays in Envision Eugene and the UGB Adoption Package.

Adopting Our Own Comprehensive Plan

Watch the Video!

In Oregon, every city has a comprehensive plan that establishes an urban growth boundary and includes a set of policies to guide how land within that boundary is used. The draft Envision Eugene Comprehensive Plan includes policies to support our collective vision for the future of our community. Learn more about the comprehensive plan by visiting our website or reading this fact sheet.

The Envision Eugene Comprehensive Plan will be created in phases. The current draft includes a focused set of policies required to get our UGB adopted. It is made up of four chapters: Economic Development, Transportation, Administration and Implementation, and the Eugene Urban Growth Boundary. Additional chapters, addressing a broader set of community values, will be added to our comprehensive plan once this focused set of policies is adopted.
policies is adopted and we have our UGB in place. It is worth noting that housing policies will remain in the Metro Plan until a future phase. You can review the draft comprehensive plan [here](http://myemail.constantcontact.com/Your-Envision-Eugene-Newsletter.html?soid=1123418754250&aid=9Tlwaj9Oc0).

Tell us what you think! You can fill out the questionnaire, visit us at one of our upcoming events or submit your written comments to envisioneugene@ci.eugene.or.us. Your input will help us make sure Eugene the best that it can be as we continue to grow!

Take the Questionnaire

Community Outreach

Community Events
Last week the Envision Eugene Team was in Santa Clara and River Road where we spoke with nearly 60 people. In Santa Clara we heard that residents would like to see more places to eat and gather and that they love their nearby farm stands. River Road residents said they wanted better transportation safety and more transportation options, in addition to more commercial development along key corridors in their neighborhood.

Come say "hello" at one of the upcoming community events going on until the end of September!

Upcoming Community Events:
- September 2, 5:30-8 pm, First Friday Art Walk (*Downtown*)
- September 10, 11 am - 3 pm, South East Neighbors Picnic (*Tugman Park*)

NEW!

Drop in Sessions and Open House
In addition to the community outreach we have been doing all summer, we will be hosting sessions in September where folks can take a closer look at topics related to adopting our UGB, including the multi-family housing options, the areas proposed for expanding the UGB, and new comprehensive plan policies to guide growth in Eugene.

Envision Eugene Drop-in Session
- Tuesday, September 13, 4-6 pm
- Atrium Building Lobby
- 99 W. 10th Avenue, Downtown
**Bethel/Clear Lake Open House**  
Thursday, September 15, 4:30-6:30 pm  
Clear Lake Elementary Cafeteria  
4646 Barger Drive

**Envision Eugene Drop-in Session**  
Wednesday, September 21, 4-6 pm  
Atrium Building Lobby  
99 W. 10th Avenue, Downtown

Stay tuned for more events throughout the summer where you can visit the Envision Eugene booth! Go to [Get Involved!](http://myemail.constantcontact.com/Your-Envision-Eugene-Newsletter.html?soid=1123418754250&aid=9lTIwaj9Oc0) for the latest information.

To subscribe to Envision Eugene, email envisioneugene@ci.eugene.or.us and tell us you would like to receive our emails. Thanks for your interest, and as always, please let us know if we can answer any questions about Envision Eugene.

City of Eugene Planning & Development Department  
99 W. 10th Avenue | Eugene | OR | 97401

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Envision Eugene Newsletter

What's New with Envision Eugene?

August 31, 2016

Over the last several weeks we have been highlighting aspects of Eugene's housing need and the urban growth boundary adoption process. This week we take a look at two important pillars of Envision Eugene: Climate and Energy Resiliency, and Natural Resources. We consider how current and future steps in the Envision Eugene process will help us achieve our community vision of growing responsibly and reducing our impact on the natural environment. As always you can visit our website for the latest information, or visit us at one of the upcoming events.

www.envisioneugene.org
Planning for Climate Change and Energy Resiliency

During the community visioning phase of Envision Eugene (2010-2012), one of the community values that emerged was to plan for climate change and energy resiliency. This became one of seven pillars that guide the work of Envision Eugene. Learn more about this background [here](http://myemail.constantcontact.com/Your-Envision-Eugene-Newsletter.html?soid=1123418754250&aid=7m_6FQjExc0).

In order to combat the negative impacts of climate change and to make us more resilient, the City of Eugene has set ambitious goals for reducing fossil fuel consumption and the resulting carbon emissions. One of the main ways that Envision Eugene sets out to achieve these goals is by encouraging compact development, 20 minute neighborhoods and alternative modes of transportation.

Learn more by clicking on the infographic and by visiting [www.envisioneugene.org](http://www.envisioneugene.org).

Protecting, Restoring and Enhancing Natural Resources

In addition to the climate and energy pillar, the Envision Eugene community visioning process resulted in the natural resource pillar. This community value calls on us to protect, restore and enhance natural resources.

Eugeneans are lucky to enjoy a city with thousands of acres of parks and natural areas. Yet, some parts of our city have less access to parks than others and on the whole, we need 355 acres of new community parks to serve our growing population.

That is why the proposed urban growth boundary includes two expansions, one in Santa Clara and one in Clear Lake, both of which contain space for parks. In
addition, the Clear Lake expansion includes a strong focus on environmental justice and the need to protect, restore and enhance natural resources in that area.

Learn more by clicking on the infographic and by visiting [www.envisioneugene.org](http://www.envisioneugene.org).

**Community Outreach**

**Reminder: Take Our Questionnaires**

So far this summer we have released two questionnaires: Back in July we released one questionnaire on options for accommodating 600 medium density homes. Just last week we released a second, requesting your input on the draft comprehensive plan. If you haven’t filled out a questionnaire yet, please do!
Community Events
All summer long the Envision Eugene Team has been attending community events across Eugene. We've been at Party in the Parks, Sunday Streets, neighborhood picnics, and a First Friday Art Walk. We have been talking to residents about their neighborhoods, what they love, what's missing and how Envision Eugene seeks to improve quality of life for all residents of Eugene.

We only have three summer outreach events left before the end of September. Come drop by the Envision Eugene tent, say "hello," and learn more about the next steps in adopting our urban growth boundary and comprehensive plan.

Upcoming Community Events:
September 2, 5:30-8 pm, First Friday Art Walk (Broadway Plaza / Kesey Square)
September 10, 11 am - 3 pm, South East Neighbors Picnic (Tugman Park)
September 25, noon – 4 pm, Sunday Streets (South University Neighborhood)

Drop in Sessions and Open House
In addition to our summer outreach, we will be hosting sessions in September where folks can take a closer look at topics related to adopting our UGB, including the multi-family housing options, the areas proposed for expanding the UGB, and new comprehensive plan policies to guide growth in Eugene. Come see us at one of the following events.

Envision Eugene Drop-in Session
Tuesday, September 13, 4-6 pm
Atrium Building Lobby
99 W. 10th Avenue, Downtown

Bethel/Clear Lake Open House
Thursday, September 15, 4:30-6:30 pm
Clear Lake Elementary Cafeteria
4646 Barger Drive

Envision Eugene Drop-in Session
Wednesday, September 21, 4-6 pm
Atrium Building Lobby
99 W. 10th Avenue, Downtown

All of the materials that will be presented at the open house and drop in sessions are available on our website. Visit www.envisioneugene.org!

To subscribe to Envision Eugene, email envisioneugene@ci.eugene.or.us and tell us you would like to receive our emails. Thanks for your interest, and as always, please let us know if we can answer any questions about Envision Eugene.
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Envision Eugene Newsletter

What's New with Envision Eugene?

September 9, 2016

A key component of Envision Eugene is ensuring we have enough land within our urban growth boundary (UGB) for 20 years of population and employment growth. This includes expanding the UGB where necessary. In doing this, we are aiming for a balance among the seven pillars of Envision Eugene, including economic opportunities, natural resource protection and livability. This newsletter includes information about Eugene's economy, the proposed Clear Lake and Santa Clara expansion areas and details on upcoming events where you can talk with the Envision Eugene Team. As always you can visit our website for the latest information.

www.envisioneugene.org
Economic Opportunities

With a median household income that is lower than state and national averages and elevated rates of poverty, one of the community values that guides Envision Eugene is supporting economic opportunities for all Eugeneans.

This includes focusing on our traditional strengths in construction, health care, wood products, and transportation manufacturing, while at the same time looking to emerging opportunities in clean tech, renewable energy and the food and beverage industry. All of these industries require land to conduct operations, including large sites with access to freight routes. These requirements have limited some opportunities for our existing businesses to grow and for new jobs to come to our community.

Learn more about the state of Eugene’s economy and the opportunities we are creating by clicking on this infographic and by visiting our [website](http://myemail.constantcontact.com/Your-Envision-Eugene-Newsletter.html?soid=1123418754250&aid=RkVbsoQtpbY).

Expansion Areas

As part of Envision Eugene, the City is proposing to expand the UGB for about 3,000 jobs, a community park and a school in the Clear Lake Road area near the Eugene Airport. The expansion would add a total of 924 acres, including the 222 acre Golden Gardens community park and a 54 acre school site. Additionally, 35 acres of land are...
proposed to be added to the UGB for a community park in Santa Clara. Learn more about the expansions by watching the video above or visiting the expansion pages on our website.

Clear Lake Expansion

The community's best outcome for development in the Clear Lake Road area is to create an employment center that is economically productive while being developed and operated in an environmentally responsible way. To that end, City Council directed Planning staff to address potential environmental and health concerns in this area, which is already home to many industrial uses.

The result is a proposed new zoning tool, the Clear Lake Overlay Zone (September 2016), which has two major focuses:

1. Preservation of the large lots in the expansion area; and
2. Prohibition of certain uses and new performance standards to improve compatibility and environmental health

Additional work beyond the proposed overlay zone must be pursued so that development in the Clear Lake Road area meets the community's expectations for increased employment opportunities, public health and wetland restoration.

Santa Clara Expansion

Community Outreach

Take Our Questionnaires

In addition to the multi-family options questionnaire and the comprehensive plan questionnaire, this week we released a questionnaire about the proposed expansions of the urban growth boundary. Tell us what you think!
Community Events
All summer long the Envision Eugene Team has been attending community events across Eugene. We've been at Party in the Parks, Sunday Streets, neighborhood picnics, and the First Friday Art Walks. We have been talking to residents about their neighborhoods, what they love, what's missing and how Envision Eugene seeks to improve quality of life for all residents of Eugene.

We only have two summer outreach events left before the end of September. Come drop by the Envision Eugene tent, say "hello," and learn more about the next steps in adopting our urban growth boundary and comprehensive plan.

Upcoming Community Events:
September 10, 11 am - 3 pm, South East Neighbors Picnic (Tugman Park)
September 25, noon – 4 pm, Sunday Streets (South University Neighborhood)

Drop-in Sessions and Open House
In addition to our summer outreach, we will be hosting sessions where folks can take a closer look at topics related to adopting our UGB, including the multi-family housing options, the areas proposed for expanding the UGB, and new comprehensive plan policies to guide growth in Eugene. Come see us at one of the following events.

Envision Eugene Drop-in Session
Tuesday, September 13, 4-6 pm
Atrium Building Lobby
99 W. 10th Avenue, Downtown

Bethel/Clear Lake Open House
Thursday, September 15, 4:30-6:30 pm
Clear Lake Elementary Cafeteria
4646 Barger Drive

Envision Eugene Drop-in Session
Wednesday, September 21, 4-6 pm
Atrium Building Lobby
99 W. 10th Avenue, Downtown

All of the materials that will be presented at the open house and drop in sessions are available on our website. Visit www.envisioneugene.org!

To subscribe to Envision Eugene, email envisioneugene@ci.eugene.or.us and tell us you would like to receive our emails. Thanks for your interest, and as always, please let us know if we can answer any questions about Envision Eugene.
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Envision Eugene Newsletter

Public Involvement Reminder
September 12, 2016

This is a reminder of some of the upcoming opportunities to engage with Envision Eugene this week and before the end of September, including upcoming drop-in sessions, the three questionnaires and the one remaining summer outreach event. Come learn more and share your opinion at one of our upcoming events. As always you can visit our website for the latest information.

www.envisioneugene.org
Open House

Starting Tomorrow!

We will be hosting sessions where folks can take a closer look at topics related to adopting our UGB, including the multi-family housing options, the areas proposed for expanding the UGB, and new comprehensive plan policies to guide growth in Eugene. Come see us at one of the following events:

**Envision Eugene Drop-in Session**
**TOMORROW**
Tuesday, September 13, 4-6 pm
Atrium Building Lobby
99 W. 10th Avenue, Downtown

**Bethel/Clear Lake Open House**
Thursday, September 15, 4:30-6:30 pm
Clear Lake Elementary Cafeteria
4646 Barger Drive

**Envision Eugene Drop-in Session**
Wednesday, September 21, 4-6 pm
Atrium Building Lobby
99 W. 10th Avenue, Downtown

All of the materials that will be presented at the open house and drop in sessions are available on our website. Visit [www.envisioneugene.org](http://www.envisioneugene.org)!

Questionnaires

Over the past two months, we released three questionnaires, seeking your input on options for accommodating multi-family housing, the draft comprehensive plan and the two expansions that are proposed to the urban growth boundary. In order for us to present your input on multi-family options to Council by September 30th, that questionnaire will close on Sunday, September 25th. The comprehensive plan and the UGB expansions questionnaires will remain open longer. Please complete the questionnaires, if you haven't already, and share the questionnaire links with your friends.

**Closing September 25th**

Multi-Family Housing Questionnaire

Closing Later

Comprehensive Plan Questionnaire
Community Events

All summer long the Envision Eugene Team has been attending community events across Eugene. We've been at Party in the Parks, Sunday Streets, neighborhood picnics, and the First Friday Art Walks. We have been talking to residents about their neighborhoods, what they love, what's missing and how Envision Eugene seeks to improve quality of life for all residents of Eugene.

We only have one summer outreach event left before the end of September. Come drop by the Envision Eugene tent, say "hello," and learn more about the next steps in adopting our urban growth boundary and comprehensive plan.

Final Community Event of the Summer:
September 25, noon – 4 pm, Sunday Streets (South University Neighborhood)

To subscribe to Envision Eugene, email envisioneugene@ci.eugene.or.us and tell us you would like to receive our emails. Thanks for your interest, and as always, please let us know if we can answer any questions about Envision Eugene.

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Envision Eugene Newsletter

What's New with Envision Eugene?

September 23, 2016

Envision Eugene has always aimed to represent the diverse needs of our community and find synergies between our community values. It is this balance that provides an opportunity to meet multiple community objectives. This newsletter focuses on two of the seven pillars of Envision Eugene: Compact Development and Neighborhood Livability. Envision Eugene is about these pillars working side by side with economic opportunity, housing affordability, natural resource protection and climate and energy resiliency.

This week's newsletter includes two new infographics and reminders about the remaining outreach events and opportunities to participate. As always you can visit our website for
Compact Development and Neighborhood Livability

As a community we have identified the promotion of compact urban development and efficient transportation options as an important community value. Equally important is the concept of neighborhood livability. Envision Eugene aims to advance these two community values together.

In addition to being a pillar of Envision Eugene, compact growth is a key component of Oregon’s statewide land use planning framework. Oregon cities must plan to use land efficiently in order to minimize impacts on our farms and forests.

In Eugene average household size has decreased and commuting by bike and foot are on the rise. Compact development in certain areas could allow more people to find housing options that are appropriate to their needs and make cycling, walking and transit viable options for more residents.

Related to compact development is the concept of neighborhood livability. As Eugene continues to grow at a steady pace, Envision Eugene seeks to protect and enhance what makes Eugene a great place to live.

Livability is a complex concept, with a variety of opinions about what makes a great place to live. Some of us prefer the space, privacy and quiet that comes with single family neighborhoods and large lots, while others prefer the bustle and accessibility that denser urban environments provide. Of course, cost is also an important factor we all consider when deciding where to live.

One of the goals of Envision Eugene is to increase opportunities and amenities in neighborhoods city-wide so that 90% of
them can function as 20 minute neighborhoods by 2035. Twenty minute neighborhoods are neighborhoods where residents can access shops, recreation, and services within a 20 minute walk. This could mean adding parks and schools in areas that need them and encouraging more housing and retail along our key corridors. It also means planning for compatibility with the surrounding residential areas. Twenty minute neighborhoods advance livability and compact development in addition to the other pillars of Envision Eugene.

Learn more about how Envision Eugene seeks to protect and enhance neighborhood livability and promote compact development and efficient transportation options by clicking on these infographics and by visiting our [website](http://myemail.constantcontact.com/Your-Envision-Eugene-Newsletter.html?soid=1123418754250&aid=rQI7Pavh0Sc).

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**Community Outreach**

**Reminder: Multi-Family Questionnaire Closes this Sunday!**

In order for us to present your input on multi-family options to Council by September 30th, this questionnaire will close on Sunday, September 25th. If you haven't already, please fill out the questionnaire and share the link with your friends by forwarding this newsletter!

Multi-Family Questionnaire
In addition to the multi-family questionnaire, you can provide input on the draft comprehensive plan and the urban growth boundary expansion areas by filling out the questionnaires below. These questionnaires will remain open until early October.

Expansion Areas Questionnaire

Comprehensive Plan Questionnaire

Drop-in Sessions and Open House

Over the past two weeks about 75 of you took the opportunity for a deeper dive on the draft comprehensive plan, adopting our urban growth boundary, the proposed UGB expansions and other aspects of Envision Eugene. Thank you for coming out, learning about the project, and asking tough questions. It was great to have so many of you involved.

All of the materials that were presented at the open house and drop in sessions remain set-up in the Atrium Building (99 W 10th Ave) and are available on our website. Visit www.envisioneugene.org!

Community Events

We only have one summer outreach event left before the end of September. Come drop by the Envision Eugene tent, say "hello," and learn more about the next steps in adopting our urban growth boundary and comprehensive plan.

Final Event!
September 25th, Sunday Streets (Hilyard Community Center) Noon – 4 pm

To subscribe to Envision Eugene, email envisioneugene@ci.eugene.or.us and tell us you would like to receive our emails. Thanks for your interest, and as always, please let us know if we can answer any questions about Envision Eugene.
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Envision Eugene Newsletter

What's New with Envision Eugene?

September 30, 2016

This email provides a quick overview of some of the important dates that are coming up for Envision Eugene, including the closing of questionnaires and a City Council work session on Wednesday, October 12th. You can always find the latest information by visiting our website.

www.envisioneugene.org

Questionnaires

The Comprehensive Plan Questionnaire
will close next Wednesday, Oct 5th

The Comprehensive Plan questionnaire will close at midnight on October 5th. Please complete the questionnaire and share it with your friends.

Comprehensive Plan Questionnaire

The expansion areas questionnaire will close later in October.

Expansion Areas Questionnaire

Council Work Session:
Multi-Family Housing Strategies

The Envision Eugene Team will present a summary of the public input received on the multi-family strategies and ask Council for direction on which strategies to pursue at the Council work session on October 12th 2016. This summary will include comments we have received through a variety of communication channels, including email, in-person events and the online questionnaire, and it will inform Council's decision about how to accommodate the 1,600 multifamily homes we need to find space for.

Council Work Session
Multi-Family Housing Strategies

October 12th 2016, Noon
Harris Hall
125 East 8th Avenue
Eugene, OR 97401

To learn more about this decision, visit our multi-family options website or watch this video. The agenda and materials for the work session will be available at this link on Friday, October 7th. As always, visit our website for the latest information about Envision Eugene and don't hesitate to contact us with questions, concerns and input. Thank you!

To subscribe to Envision Eugene, email envisioneugene@ci.eugene.or.us and tell us you would like to receive our emails. Thanks for your interest, and as always, please let us know if we can answer any questions about Envision Eugene.

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Envision Eugene Newsletter

What's New with Envision Eugene?
October 6th, 2016

This week's newsletter includes important dates coming up over the next few weeks, including the closing of our last questionnaire and a revised City Council date of October 24 for multi-family housing options. This newsletter also includes information about the 7th pillar of Envision Eugene, Flexible Implementation and links to an exciting new project in Downtown Eugene. You can always find the latest information about Envision Eugene by visiting our website.

www.envisioneugene.org

Important Dates
Expansion Areas Questionnaire closing October 19th

The Expansion Areas questionnaire will close at midnight on October 19th. Please watch this video, if you haven’t already, complete the questionnaire, and share it with your friends.

Expansion Areas Questionnaire

Council Work Session: New Date & Time

The City Council work session on Envision Eugene has been moved to Monday, October 24th 2016 (this takes the place of the previously scheduled October 12th work session). At this work session, staff will present a summary of the public input received on the multi-family strategies and ask Council to vote on which strategies to pursue.

Council Work Session
Multi-Family Housing Strategies

October 24th 2016, 5:30pm
Harris Hall
125 East 8th Avenue
Eugene, OR 97401

To learn more about this decision, visit our multi-family options website or watch this video. The agenda and materials for the work session will be available at this link on Friday, October 21st. As always, visit our website for the latest information about Envision Eugene and don’t hesitate to contact us with questions, concerns and input. Thank you!
The final pillar of Envision Eugene is Flexible Implementation. This pillar speaks to the need to monitor growth in the community and ensure that change and development are supporting the best outcomes of the six other pillars of Envision Eugene.

We can forecast growth, plan for change and model the impacts of policies. But, as with any prediction, we don't always get it right and outside forces influence local trends. That is why we need to monitor growth, respond to emerging trends, and adjust our assumptions and our strategies when needed.

As part of Envision Eugene we will develop a growth monitoring program after we adopt our UGB. Council has directed that monitoring begin upon UGB adoption, and that the first reporting should occur within three years. Thereafter, the City should evaluate the effectiveness of our strategies every 5 years. We will collect and track key information related to our population growth, our supply of buildable land, housing trends, economic development, parks, 20 minute neighborhoods, and the effectiveness of our strategies to create more room for jobs and homes (e.g. development incentives and zoning code changes). And, we will make this information available in clear, publicly available reports.

You can click on the infographic to learn more about flexible implementation or visit our website at envisioneugene.org.

Places for people
We thought you might also be interested in a new initiative in downtown Eugene. The City of Eugene is partnering with Project for Public Spaces to bring you Places for People, an effort to make our downtown public spaces more safe, vibrant and welcoming. There are a number of events happening in Eugene next week and an ongoing questionnaire. Check out the project website for more details.

Places for People

To subscribe to Envision Eugene, email envisioneugene@ci.eugene.or.us and tell us you would like to receive our emails. Thanks for your interest, and as always, please let us know if we can answer any questions about Envision Eugene.

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Envision Eugene Newsletter

What's New with Envision Eugene?
October 14th, 2016

This week's newsletter provides a summary of community input we have received on the proposed strategies for accommodating our multi-family need. We have also included a few reminders about important upcoming dates. You can always find the latest information about Envision Eugene by visiting our website.

www.envisioneugene.org

Multi-Family Outreach Report
Over the course of the summer, the Envision Eugene Team has been busy. We’ve attended or hosted 15 community events where we spoke to about 500 people. We sent 2,727 letters to property owners that could be impacted by changes being considered to the R-2 zone and we’ve been responding to the phone and email inquiries these letters generated. We have sent 14 newsletters like this one since mid July and we have been emailing, talking on the phone and meeting with residents and other important stakeholders on a daily basis. Additionally, 185 of you completed the multi-family options questionnaire and we heard from dozens more people from underrepresented parts of our community in a focused effort to reach further with our outreach. Thank you to all those who participated! This week we are sharing the results of our efforts with you.

Based on the feedback we received, we can say that there was general support for accommodating more high density housing downtown, although there were concerns about safety, overcrowding and the use of incentives to achieve this. With regards to accommodating the remaining 600 medium density homes, the leading strategy was increasing required density for new development on larger lots in the R-2 zone. Visit our multi-family options page for details on this and other options, where you can also find the full outreach report. Generally there was support for adding housing along our key transportation corridors - the key corridor strategy - although there were a variety of opinions expressed about the timing and details of implementation. Additionally, residents wanted the City to encourage secondary dwelling units, tiny homes and other forms of non-traditional housing and some suggested expanding the UGB for housing. Reoccurring themes were compatibility with existing neighborhoods, both in terms of building design and off site impacts such as noise and traffic, and concerns about housing affordability as we plan for the future.

We are thankful to all of those who participated online, by phone and in person. This information will be presented to council and discussed at the Council Work Session on October 24th (full details below).

Read the Full Outreach Report

Important Dates

Expansion Areas Questionnaire closing October 19th

The Expansion Areas questionnaire will close at midnight on October 19th. Please watch this video, if you haven’t already, complete the questionnaire, and share it with your friends.
Council Work Session

The City Council work session on Envision Eugene will take place on **Monday, October 24th 2016** (this takes the place of the previously scheduled October 12th work session). At this work session, staff will present a summary of the public input received on the multi-family strategies and ask Council to vote on which strategies to pursue.

**Council Work Session**
Multi-Family Housing Strategies

**October 24th 2016, 5:30pm**
Harris Hall
125 East 8th Avenue
Eugene, OR 97401

To learn more about this decision, visit our [multi-family options website](http://myemail.constantcontact.com/Your-Envision-Eugene-Newsletter.html?soid=1123418754250&aid=V-zPCKPzdtQ) or watch this [video](http://myemail.constantcontact.com/Your-Envision-Eugene-Newsletter.html?soid=1123418754250&aid=V-zPCKPzdtQ). The agenda and materials for the work session will be available at this [link](http://myemail.constantcontact.com/Your-Envision-Eugene-Newsletter.html?soid=1123418754250&aid=V-zPCKPzdtQ) on Friday, October 21st. As always, visit our website for the latest information about Envision Eugene and don’t hesitate to [contact us](http://myemail.constantcontact.com/Your-Envision-Eugene-Newsletter.html?soid=1123418754250&aid=V-zPCKPzdtQ) with questions, concerns and input. Thank you!

Placemaking Week
Although Placemaking Week in Eugene got started on Wednesday, you are not too late to participate in the many events planned over the next couple days. Come out and let us know how we can make our downtown public spaces more safe, vibrant and welcoming. Attend an open house, join a workshop or fill out a questionnaire - your participation is valuable.

Places for People

To subscribe to Envision Eugene, email envisioneugene@ci.eugene.or.us and tell us you would like to receive our emails. Thanks for your interest, and as always, please let us know if we can answer any questions about Envision Eugene.

City of Eugene Planning & Development Department
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Confirm that you like this.

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Envision Eugene is our collective vision for how we will grow while preserving what we love about our community.

Envision Eugene Newsletter

What's New with Envision Eugene?

October 19th, 2016

This week's newsletter includes three important reminders about the expansion areas questionnaire, the upcoming council work session and the multi-family housing outreach report released last week. In addition, we are highlighting a Planning Commission meeting where Envision Eugene is on the agenda. You can always find the latest information about Envision Eugene by visiting our website.

www.envisioneugene.org

Expansion Areas Questionnaire
The Expansion Areas questionnaire will close at midnight tonight (October 19th). Please watch this video, if you haven't already, complete the questionnaire, and share it with your friends.

Multi-Family Outreach Report

All summer and early fall the Envision Eugene Team has been collecting input from you on how we should accommodate our multi-family need. Last week we released a report summarizing the public input we received. The full report is available on our website.

Council Work Session

The City Council work session on Envision Eugene will take place on Monday, October 24th 2016. At this work session, staff will present a summary of the public input received on the multi-family strategies and ask Council to vote on which strategies to pursue.

Council Work Session
Multi-Family Housing Strategies

October 24th 2016, 5:30 pm
Harris Hall
125 East 8th Avenue
Eugene, OR 97401

To learn more about this decision, visit our multi-family options website or watch this video. The agenda and materials for the work session will be available at this link on Friday, October 21st.

Planning Commission Meeting

Also on October 24th, The City of Eugene Planning Commission will meet to discuss the Draft Envision Eugene Comprehensive Plan. Planning staff will present a summary of the responses to the Comprehensive Plan Questionnaire and other sources of public input.
Planning Commission Meeting
Envision Eugene Comprehensive Plan

October 24th 2016, 11:30am
Sloat Room, Atrium Building
99 West 10th Avenue
Eugene, OR 97401

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Envision Eugene Newsletter

What's New with Envision Eugene?
October 25th, 2016

This week's newsletter provides a brief update on the City Council work session held October 24th, where strategies were chosen to accommodate our multi-family need. Read more about this decision below.

www.envisioneugene.org

Council Work Session

All summer long, we have been working toward a decision on how to accommodate our multi-family need. Our analysis showed that, given our land supply and development...
trends, we didn’t have enough space for about 1,600 multi-family homes out of the total 15,000 homes needed over the next 20 years. In July, the Envision Eugene Team provided a range of options to Council that would accommodate these homes. This [video](#) explains that situation and this [fact sheet](#) shows the options presented to Council.

On Monday, October 24th, Council landed on two strategies to accommodate those remaining 1,600 multi-family homes. One strategy accommodates our high density housing need downtown through existing incentives and programs. The other accommodates our medium density residential need by increasing the minimum density in the R-2 zone from ten units per acre to fourteen. Lots smaller than half an acre and affordable housing developments would be exempt from the new minimum density requirement. You can view the webcast of the Council work session by clicking on the image below.

The strategies selected by the Council aim to balance the Envision Eugene pillars with technical feasibility, timeliness and input received from the public. Thank you to all of you who participated online and in person. Your input helped us arrive at this decision. Thanks also for the other input you provided on the key corridor strategy, concerns about the impacts of density, housing affordability and monitoring growth trends, among other issues. All of these topics will be important in future planning efforts.

This action by Council allows the process of adopting our own urban growth boundary to move forward. Over the next couple of months, the Envision Eugene Team will finalize the urban growth boundary adoption package. The formal adoption process will begin in early 2017. See our website for the project [timeline](#).

To subscribe to Envision Eugene, email [envisioneugene@ci.eugene.or.us](mailto:envisioneugene@ci.eugene.or.us) and tell us you would like to receive our emails. Thanks for your interest, and as always, please let us know if we can answer any questions about Envision Eugene.
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Envision Eugene Newsletter

What's New with Envision Eugene?

November 8th, 2016

This week's newsletter provides an overview of the work we will be doing in the coming weeks to prepare to adopt Eugene’s own urban growth boundary. Read more below, or visit our website where you can find the latest information about Envision Eugene.

www.envisioneugene.org

Adopting Our UGB

We're making progress on Envision Eugene and beginning the public hearing process for adopting our own urban growth boundary! On Monday, October 24th, Council landed...
on two strategies to accommodate about 1,600 multi-family homes within our existing urban growth boundary (UGB); accommodating more high density housing downtown and accommodating more medium density housing by increasing the minimum density required in the R-2 zone. Click on the image below to view the webcast of the Council work session where these decisions were made.

Thank you to all of you who participated in making this decision. This action by Council allows the process of adopting our own UGB to move ahead. Over the next month, the Envision Eugene Team will pull together all of the information required to adopt our UGB - about 1,000 pages of documentation! The formal adoption process will start in early 2017, beginning with Planning Commission work sessions and ending with a City Council decision by summer 2017. You can find the project timeline on our website.

View Timeline

Since July, we have been sending these emails about once a week. We are going to be a little bit quieter over the next several weeks while we focus on preparing the materials needed for the urban growth boundary adoption package. We’ll let you know as those materials are posted on our website.

Until then, we want you to know about the upcoming Planning Commission meeting on November 21st where Terri Harding will provide an update on Envision Eugene. Meeting materials will be available here prior to the meeting.

Planning Commission
November 21st 2016 @ 11:30am
Sloat Room, The Atrium Building
99 W 10th AVE, Eugene OR

To subscribe to Envision Eugene, email envisioneugene@ci.eugene.or.us and tell us you would like to receive our emails. Thanks for your interest, and as always, please let us know if we can answer any questions about Envision Eugene.
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Envision Eugene Newsletter

What's New with Envision Eugene?

November 18th, 2016

This week's newsletter provides a quick reminder that the Envision Eugene Team will be at Planning Commission on November 21st 2016. Read more below or visit our website to get the latest information on Envision Eugene.

www.envisioneugene.org

Planning Commission Meeting

Envision Eugene is on the next Planning Commission meeting agenda, scheduled for Monday, November 21st 2016. At this meeting Terri Harding will provide an update on Envision Eugene, including the results of our public outreach related to the two proposed urban growth boundary expansion areas and an overview of the UGB adoption process. There will also be an update on the South Willamette planning process. You can find the Urban Growth Boundary Expansion Areas Outreach Report here or view all of the
Planning Commission meeting materials [here](http://myemail.constantcontact.com/Reminder-Envision-Eugene-Planning-Commission-November-21st.html?soid=1123418754250&aid=eIegkfH46S0). Planning Commission meetings are open to the public and [broadcast online](#).

**Planning Commission**  
**November 21st 2016 @ 11:30am**  
Sloat Room, The Atrium Building  
99 W 10th AVE, Eugene OR

To subscribe to Envision Eugene, email envisioneugene@ci.eugene.or.us and tell us you would like to receive our emails. Thanks for your interest, and as always, please let us know if we can answer any questions about Envision Eugene.

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Envision Eugene Newsletter

What's New with Envision Eugene?
December 27th, 2016

This holiday edition of the Envision Eugene newsletter provides a sneak peek of what's to come for Envision Eugene in the new year. In January we will begin the formal adoption process for our urban growth boundary (UGB). There will be a number of opportunities for the public to learn about the UGB proposal and provide comment. Read more below or visit our website to get the latest information about Envision Eugene.

www.envisioneugene.org

Adopting Our UGB
The Envision Eugene process started with the mandate to adopt our own urban growth boundary (UGB), separate from Springfield. As part of that process we worked with the community to develop a vision, supported by the seven pillars of Envision Eugene. After 6 years of community input and technical analysis, we are ready to take a big step forward in implementing that vision by adopting our own UGB. Check out this video for an overview of where we are and where we are headed.

Formal Adoption Process Begins in January

January marks the beginning of the formal UGB adoption process. This starts with a series of work sessions with the City of Eugene and Lane County Planning Commissions. These works sessions will familiarize Commissioners and the public with the proposed UGB and supporting materials as well as the adoption process.

Following these work sessions, the City and County Planning Commissions will hold a joint public hearing where members of the public will have the opportunity to provide comment. Comments from the public will be considered by the Planning Commissions in their deliberations. After the hearing, both commissions will deliberate and make a recommendation to their respective elected bodies.

See below for important dates.

Public Involvement

This fall, we posted drafts of the UGB proposal documents to our website. Later in January we will post all of the supporting documentation for the UGB proposal to the "Adopting Our UGB" page and send you a newsletter to let you know everything is live on the web. We invite you to review the materials, ask questions and provide comment by email, by phone, by letter or at a public event.

Beginning in mid-January, the Envision Eugene team will host a series of community information sessions to provide information on the UGB proposal and adoption process. Stay tuned to this newsletter in early January for dates and locations across the City.

Upcoming Events

Eugene Planning Commission Work Sessions
Jan. 9th and 23rd at 11:30am
Sloat Room, The Atrium Building
99 W 10th Ave, Eugene OR

Community Info Sessions

Tuesday and Thursday nights mid-January to early February (precise dates and locations to be determined early in the new year).

City of Eugene and Lane County Planning Commission Joint Public Hearing

March 7th, 6pm
Harris Hall, 125 E 8th Ave
Eugene OR

To subscribe to Envision Eugene, email envisioneugene@ci.eugene.or.us and tell us you would like to receive our emails. Thanks for your interest, and as always, please let us know if we can answer any questions about Envision Eugene.

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Envision Eugene Newsletter

What's New with Envision Eugene?

January 13th, 2017

Over the holidays, we provided a sneak peek of what was to come in the new year. With January upon us, we are writing to recap the next steps with Envision Eugene and provide more details about our upcoming community info sessions. Read more below or visit our website to get the latest information about Envision Eugene.

www.envisioneugene.org

Adopting Our UGB

In December, we released this video, which explains where we are currently with the urban growth boundary (UGB)
adoption process and what it will look like over the next several months. If you haven't already, please have a look and share it with your friends.

**Formal Adoption Process Begins in January**

As a recap, the formal UGB adoption process begins this month when we post the UGB adoption package and supporting materials to [www.envisioneugene.org](http://www.envisioneugene.org). Over the next few months the Eugene and Lane County Planning Commissions will hold a series of work sessions, familiarizing the Commissioners and the public with the UGB proposal. These work sessions will lead to a joint public hearing in March and recommendations from both Commissions.

Once the Planning Commissions have provided a recommendation, the Eugene City Council and the Lane County Board of Commissioners will also hold a series of work sessions followed by a public hearing. After this important public process both bodies will make a decision on UGB adoption.

You are encouraged to learn about the UGB proposal, ask questions and provide comment. Specific opportunities are highlighted below.

**Upcoming Events**

**Eugene City Council Work Session**

January 18th, 12:00pm  
Harris Hall  
125 East 8th Ave. Eugene OR

See [meeting materials](http://www.envisioneugene.org) and [webcast link](http://www.envisioneugene.org) when available.

**Planning Commission Work Session**

January 23rd, 11:30am  
Sloat Room, The Atrium Building  
99 W 10th Ave., Eugene OR

See [meeting materials](http://www.envisioneugene.org) and [webcast link](http://www.envisioneugene.org) when available.

**Community Information Sessions**
These are drop-in style sessions from 6-7:30pm with a brief presentation at 6:30. Come learn more about the proposal and how to provide comment!

South Eugene High School Library
January 19th, 6-7:30pm
400 E. 19th Ave., Eugene OR

Sheldon High School Library
January 26th, 6-7:30pm
2455 Willakenzie Rd., Eugene OR

North Eugene High School Library
January 31st, 6-7:30pm
200 Silver Lane, Eugene OR

Churchill High School Library
February 2nd, 6-7:30pm
1850 Bailey Hill Road, Eugene OR

Eugene Downtown Library*
February 7th, 6-7:30pm
Bascom-Tykeson Room
100 W. 10th Ave., Eugene OR

Willamette High School Library
February 9th, 6-7:30pm
1801 Echo Hollow Road, Eugene OR

*Spanish translation and activities with Rec Staff for children will be provided at the downtown session.

City of Eugene and Lane County Planning Commissions
Joint Work Session and Public Hearing

March 7th, 6pm
Harris Hall, 125 E 8th Ave
Eugene OR

To subscribe to Envision Eugene, email envisioneugene@ci.eugene.or.us and tell us you would like to receive our emails. Thanks for your interest, and as always, please let us know if we can answer any questions about Envision Eugene.
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Envision Eugene Newsletter

What's New with Envision Eugene?
January 19th, 2017

We have submitted a draft version of our urban growth boundary (UGB) adoption package to the Department of Land Conservation and Development, notifying them that we are moving forward with adopting our own UGB. This starts the formal UGB adoption process and kicks off a new period of citizen involvement. Read more below or visit our website to get the latest information about Envision Eugene.

www.envisioneugene.org

UGB Adoption Package Submitted!
On January 13th the Envision Eugene Team uploaded nearly 1,000 pages of documentation to the Department of Land Conservation and Development's (DLCD) website. On January 18th we had our first UGB adoption package work session with Eugene City Council where they approved the proposed timeline and community engagement plan for the UGB adoption process. You can view a webcast of that work session here. The formal UGB adoption process is under way!

You can find all of the documents that make up the UGB adoption package (the UGB proposal, the related plan amendments and and land use code amendments, the technical studies, and the legal findings) on our website. It's a lot to wade through, so we have created this fact sheet intended to help folks navigate the proposal.

Adopting Our UGB

Planning Commission Review

Over the next few months the Eugene and Lane County Planning Commissions will hold a series of work sessions, familiarizing the Commissioners and the public with the UGB proposal. You are welcome to attend these sessions or watch the webcast to learn more. These work sessions will lead to Planning Commission public hearings in March and recommendations from both Commissions. The City Council and Lane County Board of Commissioners review occurs after the Planning Commissions' have made their recommendations.

Get Involved

You are encouraged to learn about the UGB proposal, ask questions and provide comment. Specific opportunities are highlighted below. If you are interested in speaking during a public hearing or providing written testimony, you can consult this fact sheet to learn what to expect and how to do it.

Upcoming Events

Planning Commission Work Session

January 23rd, 11:30am
Sloat Room, The Atrium Building
99 W 10th Ave., Eugene OR

See meeting materials and webcast when available.

Community Information Sessions

These are drop-in style sessions from 6-7:30pm with a brief presentation at 6:30. Come learn more about the proposal and how to provide comment!

Tonight:
South Eugene High School Library  
January 19th, 6-7:30pm  
400 E. 19th Ave., Eugene OR

Sheldon High School Library  
January 26th, 6-7:30pm  
2455 Willakenzie Rd., Eugene OR

North Eugene High School Library  
January 31st, 6-7:30pm  
200 Silver Lane, Eugene OR

Churchill High School Library  
February 2nd, 6-7:30pm  
1850 Bailey Hill Road, Eugene OR

Eugene Downtown Library*  
February 7th, 6-7:30pm  
Bascom-Tykeson Room  
100 W. 10th Ave., Eugene OR

Willamette High School Library  
February 9th, 6-7:30pm  
1801 Echo Hollow Road, Eugene OR

*Spanish translation and activities with Rec Staff for children will be provided at the downtown session.

City of Eugene and Lane County Planning Commissions  
Joint Work Session and Public Hearings

March 7th, 6pm  
Harris Hall, 125 E 8th Ave  
Eugene OR

To subscribe to Envision Eugene, email envisioneugene@ci.eugene.or.us and tell us you would like to receive our emails. Thanks for your interest, and as always, please let us know if we can answer any questions about Envision Eugene.
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Envision Eugene Newsletter

What's New with Envision Eugene?

January 26th, 2017

The formal urban growth boundary adoption process is well underway! In the past week we had our first work sessions with the Eugene City Council and the Eugene Planning Commission, and we have had our first community information session in South Eugene. This newsletter provides details about those meetings, upcoming events and how you can get involved. Read more below or visit our website to get the latest information about Envision Eugene.

www.envisioneugene.org

Council Approves Adoption Process, Timeline and Public Involvement Plan

On January 18th the Envision Eugene Team presented the proposed timeline for adopting our UGB, the adoption process and our public involvement plan to the Eugene
City Council. Council approved the process & timeline, and public involvement plan! You can watch the archived webcast of the Council work session here.

On January 23rd, we had our first work session with the Eugene Planning Commission. This work session focused on orienting the Planning Commissioners to the various materials that make up the adoption package and the process for making their recommendation to Council. You can watch the archived webcast of that session here. Their next work session on January 30th will begin walking through the materials associated with the jobs, parks and schools portion of the UGB proposal.

You can find all of the documents that make up the UGB adoption package (the UGB proposal, the related plan amendments and and land use code amendments, the technical studies, and the legal findings) on our website.

Adopting Our UGB

Get Involved

You are encouraged to learn about the UGB proposal, ask questions and provide comment. Specific opportunities are highlighted below. If you are interested in speaking during a public hearing or providing written testimony, you can consult this fact sheet to learn what to expect and how to do it.

Upcoming Events

Planning Commission Work Session

January 30th, 11:30am
Sloat Room, The Atrium Building
99 W 10th Ave., Eugene OR

See meeting materials and webcast when available.

Community Information Sessions

These are drop-in style sessions from 6-7:30pm with a brief presentation at 6:30. Come learn more about the proposal and how to provide comment!

Tonight:
Sheldon High School Library
January 26th, 6-7:30pm
2455 Willakenzie Rd., Eugene OR

North Eugene High School Library
January 31st, 6-7:30pm
200 Silver Lane, Eugene OR

Churchill High School Library
February 2nd, 6-7:30pm
1850 Bailey Hill Road, Eugene OR

**Eugene Downtown Library**
February 7th, 6-7:30pm
Bascom-Tykeson Room
100 W. 10th Ave., Eugene OR

**Willamette High School Library**
February 9th, 6-7:30pm
1801 Echo Hollow Road, Eugene OR

*Interpretación al Español y actividades para niños ofrecidas por el personal del departamento de recreación de la ciudad estarán disponibles en el evento del 7 de Febrero

*Spanish translation and activities for kids with city recreation staff will be available at the February 7th event

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**City of Eugene and Lane County Planning Commissions Joint Work Session and Public Hearing**

March 7th
6pm work session
7pm Public Hearing
Harris Hall, 125 E 8th Ave
Eugene OR

To subscribe to Envision Eugene, email envisioneugene@ci.eugene.or.us and tell us you would like to receive our emails. Thanks for your interest, and as always, please let us know if we can answer any questions about Envision Eugene.

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Envision Eugene Newsletter

What's New with Envision Eugene?

February 2nd, 2017

The public process for adopting our urban growth boundary (UGB) continues! This week we had our second work session with the Eugene Planning Commission and our third community information session of the year. We also released a community guide on the UGB proposal and process. This newsletter provides details about those work sessions, upcoming public involvement opportunities and a link to the Community Guide. Read more below or visit our website to get the latest information about Envision Eugene.

www.envisioneugene.org

Planning Commission Work Sessions

On Monday, January 30th, the Envision Eugene Team had a second work session with the Eugene Planning Commission focused on UGB adoption. Where the January 23rd
work session provided an overview of the adoption package and process for adopting our UGB, the January 30th work session began walking through the hundreds of pages that make up the adoption package. We started with the documents that support setting our UGB for jobs, parks and schools.

On February 13th we will continue working through the adoption package with the Planning Commission. You can watch archived and live webcasts of the work sessions [here](http://myemail.constantcontact.com/Check-out-the-UGB-Community-Guide-and-these-Upcoming-Events.html?soid=1123418754250&aid=nlIveLz0g9g) or attend the work session in person on February 13th (details below).

**Watch a Work Session**

You can find all of the documents that make up the UGB adoption package (the UGB proposal, the related plan amendments and land use code amendments, the technical studies, and the legal findings) on our [website](http://myemail.constantcontact.com/Check-out-the-UGB-Community-Guide-and-these-Upcoming-Events.html?soid=1123418754250&aid=nlIveLz0g9g).

**Community Guide**

Today we published the UGB Community Guide to our website. This user-friendly guide includes fact sheets, infographics and timelines all in one place. It also includes an annotated version of the presentation we have been delivering at community information sessions across the city. This is a great place to start if you are looking for an overview of the UGB proposal and adoption process.

**Get Involved**

We encourage you to learn about the UGB proposal, ask questions and provide comment. Specific opportunities are highlighted below. If you are interested in speaking during a public hearing or providing written testimony, you can consult [this fact sheet](http://myemail.constantcontact.com/Check-out-the-UGB-Community-Guide-and-these-Upcoming-Events.html?soid=1123418754250&aid=nlIveLz0g9g) to learn what to expect and how to do it.

**Upcoming Events**

**Planning Commission Work Session**

February 13th, 11:30am  
Sloat Room, The Atrium Building  
99 W 10th Ave., Eugene OR

See [meeting materials](http://myemail.constantcontact.com/Check-out-the-UGB-Community-Guide-and-these-Upcoming-Events.html?soid=1123418754250&aid=nlIveLz0g9g) and [webcast](http://myemail.constantcontact.com/Check-out-the-UGB-Community-Guide-and-these-Upcoming-Events.html?soid=1123418754250&aid=nlIveLz0g9g) when available.

**Community Information Sessions**
These are drop-in style sessions from 6-7:30pm with a brief presentation at 6:30. Come learn more about the proposal and how to provide comment!

**Tonight:**
**Churchill High School Library**
February 2nd, 6-7:30pm  
1850 Bailey Hill Road, Eugene OR

**Eugene Downtown Library**
February 7th, 6-7:30pm  
Bascom-Tykeson Room  
100 W. 10th Ave., Eugene OR

**Willamette High School Library**
February 9th, 6-7:30pm  
1801 Echo Hollow Road, Eugene OR

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**City of Eugene and Lane County Planning Commissions Joint Work Session and Public Hearing**

March 7th  
6pm work session  
7pm Public Hearing  
Harris Hall, 125 E 8th Ave  
Eugene OR

To subscribe to Envision Eugene, email envisioneugene@ci.eugene.or.us and tell us you would like to receive our emails. Thanks for your interest, and as always, please let us know if we can answer any questions about Envision Eugene.
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Envision Eugene Newsletter

What's New with Envision Eugene?

February 8th, 2017

We are less than a month away from the joint planning commission public hearing on the urban growth boundary (UGB) proposal. As this editorial by the Register Guard highlights, now is the perfect time to engage in the final step of our community process, which began in 2010. We have come a long way! We hope that folks will take advantage of opportunities to learn about the proposal and provide feedback early in this crucial phase. This newsletter contains information about learning opportunities and providing testimony. Read more below or visit our website to get the latest information about Envision Eugene.

Read the RG Editorial

Last Community Information Session
Learn about the UGB proposal and provide feedback

Tomorrow!
Willamette High School Library
February 9th, 6-7:30pm
1801 Echo Hollow Road, Eugene OR
Learn More

Community Guide

Last week we published the UGB Community Guide and we have been handing out printed copies to interested community groups. This user-friendly guide includes fact sheets, infographics and timelines all in one place. It also includes an annotated version of the presentation we have been delivering at community information sessions across the city. This is a great place to start if you are looking for an overview of the UGB proposal and adoption process.

Planning Commission Work Session

On February 13th we will continue working through the adoption package with the Planning Commission. You can watch archived and live webcasts of the work session here or attend in person.

Planning Commission Work Session

February 13th, 11:30am
Sloat Room, The Atrium Building
99 W 10th Ave., Eugene OR

See meeting materials and webcast when available.

You can find all of the documents that make up the UGB adoption package (the UGB proposal, the related plan amendments and land use code amendments, the technical studies, and the legal findings) on our website.

Joint Work Session and Public Hearing

City of Eugene and Lane County Planning Commissions
Learn about the UGB proposal and provide feedback

March 7th
6pm work session
7pm Public Hearing
Harris Hall, 125 E 8th Ave
Eugene OR

Learn more about providing testimony.

To subscribe to Envision Eugene, email envisioneugene@ci.eugene.or.us and tell us you would like to receive our emails. Thanks for your interest, and as always, please let us know if we can answer any questions about Envision Eugene.

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Envision Eugene Newsletter

What's New with Envision Eugene?

February 14th, 2017

With our community information sessions wrapped up and the Planning Commission public hearing less than a month away, we want to take stock of where we are at and where we are headed over the next few weeks. We also want to address some of the questions we have been getting about the urban growth boundary (UGB) proposal from residents like you. Learning about the UGB proposal and providing feedback now helps us provide Council with the best possible proposal this summer. Read more below, or visit us on our website for the latest information about Envision Eugene

www.envisioneugene.org

Community Information Sessions
We wrapped up three weeks of community information sessions last week with an event downtown and one in Bethel. Generally speaking, the six community information sessions were attended by small, but engaged, groups of residents. We’d like to thank everyone who came out to learn about the UGB proposal and how they can provide feedback.

More Opportunities to Learn about the UGB Proposal

If you missed the community information sessions or you still have questions, there are a number of ways you can still learn about the UGB proposal and adoption process. The UGB Community Guide is a great place to start if you are looking for a general introduction. Our website is also full of information on important UGB-related topics, whether you are looking for a high level overview, or the nitty-gritty details. Of course, the Envision Eugene Team is always available by phone (541-682-8834) and email to answer your questions.

Adopting Our UGB

Over the next few weeks, leading up to the Planning Commission public hearing on March 7th, we will be addressing some of the topics that folks have been asking questions about. We’ll be sending you newsletters covering housing, current development trends and how we are addressing the potential impacts of UGB expansion.

Upcoming Work Sessions and Public Hearing

We are already starting to hear from the public about the UGB proposal. You can view the testimony submitted so far on our website. We hope that you will continue to let us know what you think of the adoption package as we approach the March 7th public hearing. Your feedback will help Planning Commissioners make their recommendations and ensure that the best possible proposal moves forward. Envision Eugene is about planning for growth and implementing our community vision – help us achieve our best outcomes!

Lane County Planning Commission Work Session

Feb 21st, 6pm
Goodpasture Room
Lane County Customer Service Center
3050 N Delta Hwy, Eugene OR

More details
City of Eugene and Lane County Planning Commissions
Work Session and Public Hearing

March 7th
6pm work session
7pm Public Hearing
Harris Hall, 125 E 8th Ave Eugene OR

Learn more about providing testimony.

To subscribe to Envision Eugene, email envisioneugene@ci.eugene.or.us and tell us you would like to receive our emails. Thanks for your interest, and as always, please let us know if we can answer any questions about Envision Eugene.

City of Eugene Planning & Development Department
99 W. 10th Avenue | Eugene | OR | 97401
Over the next few weeks, we will be addressing some of the questions we have been hearing by email, phone and in person at our community information sessions. We hope that this will help everyone better understand the urban growth boundary (UGB) proposal and provide feedback. In this newsletter we tackle questions about an important component of implementing our community vision - *providing housing affordable to all income levels*. Read more below, or find the latest information on our website.

www.envisioneugene.org

What are the major housing components of the UGB proposal?
Our analysis shows that, with the strategies discussed below, we have enough space within our existing UGB to accommodate 20 years of housing development. Therefore, the UGB proposal does not include an expansion for housing.

Over the summer we were looking for input on how to accommodate about 1,600 multi-family homes. In October, the Eugene City Council gave staff direction to accommodate these homes by continuing existing downtown development incentives and programs, and by increasing the minimum density in the R-2 zone. These land use strategies are part of the UGB proposal, as are the studies about how much residential land we need and have for the next 20 years. Check out the multi-family housing page of our website to learn more.

Adopting our UGB will allow us to move onto three important initiatives related to housing: urban reserve planning (planning for 20+ years of growth), clear and objective standards for needed housing, and starting the growth monitoring program. These initiatives will help us ensure that we have enough land and the right policies to support the kind of development Eugeneans have said they want as part of Envision Eugene.

In addition to the UGB proposal, City staff continue to work on removing barriers to missing middle housing types such as duplexes, cottages, and townhouses, and they are working to provide more subsidized housing for people with low and very low incomes.

How did we determine we have enough land for housing?

Per state law, all buildable residential land must be counted as having capacity for housing. The City’s analysis takes into account that different land can accommodate different amounts of housing, depending on regulations and factors such as site size, slope and protected natural resources. Based on the City’s analysis and review by a technical resource group, we have enough land within the current UGB for twenty years of housing. Capacity of residential land is discussed in detail in the Residential Land Supply Study, particularly in Part II, the Housing Needs Analysis, Chapter 4. The UGB proposal also includes draft comprehensive plan policies establishing a growth monitoring program to monitor how our housing land develops.

How does the UGB proposal address housing affordability?
Housing affordability is one of the seven pillars of Envision Eugene, and a major concern for the community. The UGB adoption package addresses aspects of this complex issue in a number of ways. We are planning for an increased percentage of multifamily homes, which tend to be more affordable than single family homes. In addition, the land supply within our existing UGB includes flat land, which tends to be cheaper to build on. Third, by not expanding the UGB for housing and by promoting compact development, we hope to increase transportation options. By supporting alternatives to private automobiles, we can help households reduce this portion of their budget. Finally, housing affordability is not only impacted by the cost of housing but local wages too. The UGB expansion in the Clear Lake area aims to accommodate jobs with higher than average wages, thereby increasing overall household prosperity.

Learn More and Provide Testimony

If you would like to learn more about housing and the UGB, our housing web page is full of information from high level overviews to extensive analysis and reports. For a visual depiction of the housing need we are planning for, have a look at this housing need infographic. We have also created this housing snapshot, which provides a visual summary of housing issues in Eugene. And, you can check out these fact sheets on multi-family housing strategies, housing mix, and population and demographics to learn more.

We encourage you to provide testimony either for or against aspects of the proposal. Your comments will help the Planning Commissions make their recommendations. Participating now will help us bring the best possible proposal to the Eugene City Council and Lane County Board of Commissioners this summer.

How to Provide Testimony

You are also welcome to attend these upcoming meetings. There will be a work session with the Lane County Planning Commission on Feb 21st and a joint work session and public hearing with both the Eugene and Lane County Planning Commissions on March 7th. The work sessions provide opportunities to learn more about the proposal and the public hearing provides an opportunity for verbal testimony.

Lane County Planning Commission

Feb 21st, 6pm Work Session
Goodpasture Room
Lane County Customer Service Center
3050 N Delta Hwy
Eugene OR
There will be no broadcast of this meeting. If you plan on attending, please send us an email to say you'll be there, if possible. We want to make sure we have enough seating.

More Details

RSVP

City of Eugene and Lane County Planning Commissions

March 7th
6pm Work Session
7pm Public Hearing
Harris Hall, 125 E 8th Ave
Eugene OR

Meeting materials and webcast

To subscribe to Envision Eugene, email envisioneugene@ci.eugene.or.us and tell us you would like to receive our emails. Thanks for your interest, and as always, please let us know if we can answer any questions about Envision Eugene.

City of Eugene Planning & Development Department

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What's New with Envision Eugene?

February 24th, 2017

This week we continue our attempt to address some of the most common questions we have heard about the urban growth boundary (UGB) proposal. In this newsletter we cover the topic of current development trends and the data that underpins the UGB proposal. Read more below, or find the latest information on our website.

www.envisioneugene.org

What data is used in adopting our UGB?

The UGB proposal is based on lots of analysis and data, all vetted by a Technical Resource Group (TRG) made up of concerned citizens and local experts. Data was pulled from sources such as...

as the U.S. Census, the State of Oregon, and building permit data, complemented by local expertise.

**Housing**

In order to set our UGB for housing, we look at population forecasts, demographic trends and average household size in Eugene. We extrapolate recent trends twenty years into the future in order to determine how many homes we need to accommodate over the twenty year planning period (2012 - 2032). As part of this analysis, we also make an assumption about the mix of housing we anticipate. In other words, we have to determine how many single-family homes we need to accommodate compared to multi-family homes, such as town homes and apartments. This infographic summarizes this data and more.

**Key Housing Data:**

- Annual population growth of 1% (34,000 new residents by 2032)
- Average household size of 2.24 people
- 15,100 new homes
- 55% single-family homes / 45% multi-family

**Employment**

In order to set our UGB for jobs, we look at how many jobs we expect to come to Eugene over the twenty year planning period. We also consider what percentages of these jobs are likely to fall into three broad categories of employment: industrial, commercial and government. This infographic contains this data and more.

**Key Employment Data:**

- Job growth rate of 1.4% (a safe harbor in State law)
- 19% Industrial, 67% Commercial, 14% Government

In both cases, housing needs and employment needs are compared with the supply of land within the existing UGB. This is how we determine whether or not an expansion is required to accommodate twenty years of growth. In the case of housing, we have determined that we do not need to expand the UGB if we take certain actions to use our land more efficiently. In the case of jobs, we have determined that we do need to expand the UGB. The Clear Lake expansion, which will include space for over 3,000 jobs, is included in the UGB proposal.

The latest data you are using is from 2012. Isn't that kind of old?

Yes, 2012 seems like a long time ago and the data may seem out of date, especially given the economic climate over the past number of years. However, the law related to UGB adoption recognizes that the analysis required to update a UGB takes a number of years to complete. Therefore, cities are expected to set a planning period for their analysis and complete the process based on that established planning period. Our Planning period is 2012 - 2032.
Council gave staff direction to use the adopted population forecasts in 2012 and 2015. In 2016 Council gave staff direction to keep our data and assumptions as originally proposed. Keeping with this data allows us to set our UGB, an important step in implementing our community vision, and begin a monitoring program that will improve the accuracy of our data and assumptions (more on this below). At the same time, we intend on starting an urban reserve planning process that will help us identify potential future expansion areas.

Some folks have suggested that we could update at least some of our key data or assumptions that seem particularly out of date. While this may be tempting, all of the data is interconnected and policy decisions are based on the relationships between data points; updating one assumption without updating them all would impact the validity of other assumptions.

**What will happen if the assumptions are wrong?**

Data accuracy is an important issue. Therefore, as part of the UGB adoption package, we are proposing policies that would enable us to start a growth monitoring program. This program reflects pillar seven of Envision Eugene: *Provide for Adaptable, Flexible and Collaborative Implementation as We Plan for Growth.*

With regular data collection and reporting, City staff and community members will know how current development trends compare to our assumptions, highlighting areas for policy adjustment. At the same time, the Planning Division will begin a process of urban reserve planning - planning for growth beyond the twenty year horizon. This initiative will help us prioritize potential expansion areas and make us more adaptable and flexible in the long term as we grow.

Learn More and Provide Testimony

In addition to the links provided above, you might want to look at the [growth management and population](#) or the [growth monitoring](#) pages on our website. You can also download a fact sheet about [housing mix](#) or [population and demographics](#).

We encourage you to provide testimony either for or against aspects of the proposal before or at the March 7th public hearing. Your comments will help the Planning Commissions make their recommendations. Participating now will help us bring the best possible proposal to the Eugene City Council and Lane County Board of Commissioners this summer.
How to Provide Testimony

You are encouraged to attend the work session and public hearing on March 7. The work session will include a presentation about the UGB proposal followed by an open house with informational materials on display and available to take home. People will have the opportunity to ask staff questions before speaking at the hearing. The public hearing that will follow offers members of the public the opportunity to provide verbal testimony to both Commissions. Written testimony can be provided by email or regular mail at any time.

City of Eugene and Lane County Planning Commissions

March 7th
6pm Work Session
7pm Public Hearing
Harris Hall, 125 E 8th Ave
Eugene OR

Meeting materials and webcast

To subscribe to Envision Eugene, email envisioneugene@ci.eugene.or.us and tell us you would like to receive our emails. Thanks for your interest, and as always, please let us know if we can answer any questions about Envision Eugene.

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What's New with Envision Eugene?

March 2nd, 2017

Over the past few weeks we have addressed some of the most common questions we have been hearing about the urban growth boundary (UGB) proposal. Two weeks ago we covered the topic of housing and last week we covered the topic of data and assumptions built into the UGB analysis. This week we answer questions we have heard about the UGB expansions and the potential impacts on natural resources and existing neighborhoods. Read more below, or find the latest information on our website.

www.envisioneugene.org

Where are the UGB expansion areas?

The UGB proposal includes two expansion areas to address our community needs for
jobs, parks and a school. The first expansion is proposed in the Clear Lake area. This 924 acre expansion would accommodate about 3,000 jobs, a 54 acre school site and a 222 acre community park. The second expansion is in the Santa Clara area, where 35 acres have been identified to accommodate a community park.

You can watch this video to learn more about the expansions or check out the proposed Clear Lake and Santa Clara expansions on our website under Topic Areas.

Is there any way to avoid expanding onto farmland?

The Southern Willamette Valley has a lot of high quality soil for farming, making UGB expansion difficult without impacting agricultural areas. In considering this expansion, we attempted to balance all seven pillars of Envision Eugene, including protecting our natural resources, providing economic opportunities and protecting neighborhood livability.

In accordance with state law and our community values, high quality farmland was only considered for accommodating a UGB expansion after considering all other types of land. Lands devoted to another use, such as rural residential or industrial areas, and land of marginal farm value were all considered before looking at high quality farmland.

For the parks and school land, the specific location of the expansion was largely driven by concerns about equitable distribution of services in Eugene. The proposed parks would be located in Bethel and Santa Clara, addressing the needs of these underserved neighborhoods. The proposed school site responds to the Bethel School District’s identified need for a school in the Clear Lake area.

For employment land, the location was driven by the land characteristics required by our targeted industries - large, flat sites near freight routes. Much of the area around Eugene is either hilly (the south portion of town), or constrained by floodplain or protected wetlands (near the rivers and Amazon Creek). The land that was flat enough, large enough, and near enough to transportation is entirely composed of farmland. With this in mind, the expansion area is planned to minimize the impact to farmland by consolidating the expansion for jobs into one area that is already surrounded by non-
farm uses (Eugene Airport to the west, existing industrial areas to the north and east, and the Bethel neighborhood to the south).

Aren't there a lot of wetlands in the Clear Lake area?

Early in the process of exploring a possible expansion into the Clear Lake area, the presence of wetlands was raised as a two-fold concern - that we would lose a valuable natural resource, or that protected wetlands might make the area undevelopable.

The City of Eugene worked with two consultants to determine the best way to address those concerns. One consultant helped us map and evaluate the particular functions of the wetlands in the area, and the other explored the potential impacts of protecting, partially protecting, or not protecting those wetlands with local regulations.

These studies showed that most of the wetlands in the Clear Lake area had been farmed for decades, which limited their ecological value. Some wetlands in the southern part of the area were deemed "locally significant" (a legal distinction) primarily for their water quality properties. Based on this evaluation, the UGB proposal includes water quality protections for key wetlands and channels, while allowing flexibility in the rest of the area for wetlands to be retained or developed. In the event that wetlands are developed, other wetlands in the region would be enhanced, a process called wetland mitigation.

What about health impacts to residents of Bethel?

The Bethel neighborhood is already adjacent to a significant amount of industrial activity and concerns have been raised about the negative health impacts of increasing this exposure. Furthermore, the pillars of Envision Eugene call on us balance the values of neighborhood livability, natural resources, and economic development.

To address the concerns we have heard, the proposed Clear Lake expansion includes several elements that seek to prevent additional health impacts and improve quality of life in the Bethel area. At a large scale, the planned land uses transition in intensity from south to north, with the proposed park and school creating a buffer between the neighborhood to the south and the industrial uses to the north. Further, the industrial uses are planned so that the least intense uses are closest to the neighborhood and the most intense uses are closest to the airport. This map shows this transition.

The UGB proposal also includes regulations and provisions to significantly limit pollution, excessive noise, and other negative impacts throughout the area. These regulations are contained in the proposed Clear Lake Overlay Zone.

Learn More and Provide Testimony

Fact Sheets
In addition to the links provided above, you may want to read our Santa Clara and Clear Lake expansion area fact sheets.

Adoption Package - February Update
In preparation for the Joint Planning Commission Public Hearing, the Envision Eugene
team has updated portions of the January 2017 Proposed UGB Package. This February Update is limited to minor corrections, clarifications and additions. Typographical and other minor edits will be addressed during deliberations after the public hearing, in addition to other alterations recommended by the Planning Commissions.

March 7th Work Session and Public Hearing
You are encouraged to attend the work session and public hearing on March 7th. The work session will include a presentation about the UGB proposal followed by an open house with informational materials on display and available to take home. You will also have the opportunity to ask staff questions before the hearing. The public hearing that will follow offers members of the public the opportunity to provide verbal testimony to both Commissions. Written testimony can be provided by email or regular mail at any time.

How to Provide Testimony

City of Eugene and Lane County Planning Commissions
March 7th
6pm Work Session
7pm Public Hearing
Harris Hall, 125 E 8th Ave
Eugene OR

Meeting materials and webcast

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Envision Eugene is our collective vision for how we will grow while preserving what we love about our community.

Envision Eugene Newsletter

What's New with Envision Eugene?

March 7th, 2017

This is just a short message to remind everyone about the Joint Planning Commission Public Hearing tonight. As always, you can find the latest information on our website. We hope to see you at Harris Hall!

www.envisioneugene.org

Public Hearing

http://myemail.constantcontact.com/Public-Hearing-Tonight-.html?oid=1123418754250&aid=xnUTJEWZAZk
March 7th Work Session and Public Hearing
You are encouraged to attend the work session and public hearing tonight (March 7th). The work session will include a presentation about the UGB proposal followed by an open house with informational materials on display and available to take home. You will also have the opportunity to ask staff questions before the hearing. The public hearing that will follow offers members of the public the opportunity to provide verbal testimony to both Commissions.

How to Provide Testimony

What have we heard so far?

City of Eugene and Lane County Planning Commissions

March 7th
6pm Work Session
7pm Public Hearing
Harris Hall, 125 E 8th Ave
Eugene OR

Meeting materials and webcast

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Envision Eugene Newsletter

What's New with Envision Eugene?
March 9th, 2017

This newsletter contains an update on the work session and public hearing that were held March 7th. It contains links to the webcast and information on how you can still provide testimony to the Planning Commissions. As always, you can find the latest information about Envision Eugene on our website.

www.envisioneugene.org
On March 7th the Lane County and City of Eugene Planning Commissions met at Harris Hall in Eugene. They heard about the urban growth boundary (UGB) adoption package from staff and testimony from the public.

The work session started with a brief presentation from Terri Harding, project manager for Envision Eugene. This was followed by a break where members of the public could learn more about the proposal and ask questions of Planning Staff. The public hearing portion of the evening followed, with 17 members of the public providing their comments on the proposal.

You can view a webcast of the presentation and public hearing online.

Watch the Webcast

At the end of the public hearing both Commissions voted to leave the public record open for one additional week. **Members of the public can submit written testimony to the two Planning Commissions until 5pm on March 14th.** Testimony submitted after this time will be saved until the next phase of the adoption process with the Eugene City Council and Lane County Board of Commissioners. These elected bodies will review all testimony received before and after the March 14th Planning Commission deadline.

How to Provide Testimony

We are keeping a publicly available database of all of the testimony we have received. The spreadsheet, with links to the pieces of testimony, is available [here](http://myemail.constantcontact.com/Public-Hearing-Recap-and-Next-Steps.html?soid=1123418754250&aid=u8j_9TNXCHA). Hard copies of the testimony are also available from reception at the Atrium Building in Eugene (99 W 10th).

Next Step: Deliberations

From here, the Planning Commissions begin deliberations. This is when they review documents submitted by staff and testimony from the public in order to make a recommendation on UGB adoption to their respective elected bodies (the City Council and County Board of Commissioners). The Eugene Planning Commission begins deliberations on April 10th. The Lane County Planning Commission begins May 2nd. These meetings are open to the public.

**Eugene Planning Commission**  
April 10th, 11:30am - 1:30pm  
Sloat Room, Atrium Building  
99 W 10th, Eugene

You can also watch the Eugene Planning Commission meeting webcasts [here](http://myemail.constantcontact.com/Public-Hearing-Recap-and-Next-Steps.html?soid=1123418754250&aid=u8j_9TNXCHA).

**Lane County Planning Commission**  
May 2nd , 7 - 8pm  
Goodpasture Room  
Lane County Customer Service Center  
3050 N Delta Hwy, Eugene

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Envision Eugene Newsletter

What's New with Envision Eugene?
March 13th, 2017

This is just a reminder that the public record that will be provided to the Planning Commissions will close tomorrow, March 14th, at 5pm. If you would like your testimony to be considered as part of the Planning Commission phase of the urban growth boundary adoption process, submit your written comments before this deadline. You can always visit our website to get the latest information about Envision Eugene.

www-envisioneugene.org

Submit Your Testimony

At the end of last week’s public hearing both Commissions voted to leave the public record open for one additional week. Members of the public can submit written
testimony to the two Planning Commissions until 5pm on March 14th.

How to Provide Testimony

Testimony submitted after this deadline will be saved until the next phase of the adoption process with the Eugene City Council and Lane County Board of Commissioners. These elected bodies will be provided with all testimony received during the entire adoption process, including items submitted before and after the March 14th Planning Commission deadline.

Urban Growth Boundary Adoption Process

1. City Planning Commission
   Work Sessions
   Public Hearing
   Deliberations
   Recommendations

   We Are Here

2. Eugene City Council
   Work Sessions
   Public Hearing
   Deliberations

   Lane County Board of Commissioners

   Final Decisions

Deliberations

Deliberations begin after the record is closed. Planning Commission deliberations will result in a recommendation on UGB adoption to Eugene City Council and the Lane County Board of Commissioners. Members of the public are welcome to attend deliberations in person or watch the Eugene deliberations online (Lane County Planning
Commission meetings are not broadcast live, however an audio recording is made available online after the meeting).

**Eugene Planning Commission**
April 10th, 11:30 am - 1:30 pm
April 17th, 11:30 am - 1:30 pm
April 24th, 11:30 am - 1:30 pm
Sloat Room, Atrium Building
99 W 10th, Eugene

**Lane County Planning Commission**
May 2nd, 6 pm *(Note time change)*
Goodpasture Room
Lane County Customer Service Center
3050 N Delta Hwy, Eugene

You can also watch the Eugene Planning Commission meeting webcasts [here](#).

To subscribe to Envision Eugene, email envisioneugene@ci.eugene.or.us and tell us you would like to receive our emails. Thanks for your interest, and as always, please let us know if we can answer any questions about Envision Eugene.

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Envision Eugene Newsletter

What's New with Envision Eugene?

March 30th, 2017

This week's Envision Eugene newsletter includes a reminder of where you can find the testimony submitted during the Planning Commission phase of the Urban Growth Boundary adoption process. It also includes a link to where you can learn more about the ongoing work to address the concerns that were raised. You can always visit our website to get the latest information about Envision Eugene.

www.envisioneugene.org

What have we heard so far?
From housing affordability and UGB expansions, to public involvement and the proposed monitoring program, members of the public provided valuable testimony on the proposed UGB and supporting documentation. You can view all of the written testimony [here](http://myemail.constantcontact.com/Thanks­for­your­input­.html?soid=1123418754250&aid=ffIZnwuVhTc) and all of the verbal testimony [here](http://myemail.constantcontact.com/Thanks­for­your­input­.html?soid=1123418754250&aid=ffIZnwuVhTc) (skip to 1:00:30).

Staff are working to respond to the concerns and questions that were raised during this first phase of public comment on the UGB adoption package. A staff response to the testimony submitted will be provided next week for the April 10th Planning Commission meeting package.

All testimony submitted before March 14th will be considered by both Planning Commissions during their deliberations.

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**Deliberations Start in April**

**Urban Growth Boundary Adoption Process**

1. **City Planning Commission**
   - Work Sessions
   - Public Hearing
   - **We Are Here**
   - Deliberations
   - Recommendations

2. **Eugene City Council**
   - Work Sessions
   - Public Hearing
   - Deliberations

**Final Decisions**

Planning Commission deliberations begin in April and will result in a recommendation on the UGB adoption package to Eugene City Council and the Lane County Board of Commissioners. Members of the public are welcome to attend deliberations in person or watch the Eugene deliberations online (Lane County Planning Commission meetings are not broadcast live, however an audio recording is made available online after the meeting).

**Eugene Planning Commission**
- April 10th, 11:30 am - 1:30 pm
- April 17th, 11:30 am - 1:30 pm
- April 24th, 11:30 am - 1:30 pm

**Lane County Planning Commission**
- May 2nd, 6 pm
- (Note time change)
- Goodpasture Room

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http://myemail.constantcontact.com/Thanks-for-your-input-.html?oid=1123418754250&aid=ffIZnwuVhTc
Thanks for your input!

Sloat Room, Atrium Building
99 W 10th, Eugene

You can watch the Eugene Planning Commission meeting webcasts here.

Lane County Customer Service Center
3050 N Delta Hwy, Eugene

More details.

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Envision Eugene Newsletter

What's New with Envision Eugene?
April 7th, 2017

This week's Envision Eugene newsletter includes a reminder of of the Planning Commission deliberations on the Urban Growth Boundary (UGB) adoption package beginning next week and information about the upcoming public hearing on the Eugene 2035 Transportation System Plan (TSP). You can always visit our website to get the latest information about Envision Eugene.

www.envisioneugene.org

UGB Deliberations Start Next Week
Planning Commission deliberations start next week. Their deliberations will result in a recommendation on the UGB adoption package to Eugene City Council and the Lane County Board of Commissioners. Members of the public are welcome to attend deliberations in person or watch the Eugene deliberations online (Lane County Planning Commission meetings are not broadcast live, however an audio recording is made available online after the meeting).

**Eugene Planning Commission**

Monday April 10th, 2017  
11:30 am - 1:30 pm  
Sloat Room, Atrium Building  
99 W 10th, Eugene

The first of three scheduled deliberations by the Eugene Planning Commission will be held on April 10th (Monday). At this meeting, Planning Commissioners will review and discuss the staff response to the testimony provided during the first phase of public comment on the UGB adoption package and questions raised by Planning Commissioners themselves. The staff response and other meeting materials can be found on this website. During and after the meeting, you can watch the webcast here.

**Meeting Materials**

**Webcast**

**Future Deliberations**

Deliberations will continue through early May and are scheduled as shown below. The meeting on April 17th will be devoted to the Clear Lake Overlay Zone.

**Eugene Planning Commission**  
April 17th, 11:30 am - 1:30 pm  
April 24th, 11:30 am - 1:30 pm  
Sloat Room, Atrium Building  
99 W 10th, Eugene

**Lane County Planning Commission**  
May 2nd, 6 pm  
Goodpasture Room  
Lane County Customer Service Center  
3050 N Delta Hwy, Eugene

**TSP Public Hearing April 17th**

For the last several years, the City of Eugene along with our partner agencies and many members of the public have been working to develop the Eugene 2035 Transportation System Plan (TSP). The draft Eugene 2035 TSP provides a 20-year blueprint for the City of Eugene’s transportation system and serves as the transportation element of the Envision Eugene Comprehensive Plan. The TSP was developed based on extensive stakeholder input, analyses of our existing transportation system and relevant adopted plans and coordination with planning processes that are underway.

A final draft of the plan is now available and can be found at www.EugeneTSP.org. We greatly appreciate the time that many people have contributed to this plan as well as people’s patience with the length of this planning process.

We are now in the final phase of the Eugene 2035 TSP adoption process which includes two public hearings before both the City Council and Lane County Board of Commissioners, and potential adoption by both the City Council and Board of County Commissioners. A City Council work session on the TSP was held on February 27, 2017.
The first joint public hearing was held on March 6, 2017. The webcasts from both the work session and public hearing can be found at this [website](http://myemail.constantcontact.com/UGB-Deliberations-Start-Monday.html?soid=1123418754250&aid=_XgBWToCYMY).

The 2nd joint public hearing will take place on Monday, April 17 at 5:30 PM in Harris Hall located at 125 East 8th Avenue.

To submit testimony for consideration by the City Council and Board of Commissioners, you may testify at the public hearing or email your testimony by noon on April 17 to City of Eugene Transportation Planning Manager Rob Inerfeld.

To subscribe to Envision Eugene, email envisioneugene@ci.eugene.or.us and tell us you would like to receive our emails. Thanks for your interest, and as always, please let us know if we can answer any questions about Envision Eugene.

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Envision Eugene Newsletter

What's New with Envision Eugene?

April 14th, 2017

This week's newsletter includes a reminder that Urban Growth Boundary (UGB) deliberations continue on Monday with a focus on the Clear lake Overlay Zone. We have included a reminder about the Transportation System Plan public hearing and an announcement about an upcoming fair housing workshop. You can visit our website to get the latest information about Envision Eugene.

www.envisioneugene.org

UGB Deliberations Continue

The Eugene Planning Commission and the Lane County Planning Commission are scheduled to continue deliberating on the proposed UGB adoption package over the
next several weeks. Their deliberations will result in a recommendation on UGB adoption to their respective elected bodies.

**Eugene Planning Commission**
Monday April 17th, 2017
11:30 am - 1:30 pm
Sloat Room, Atrium Building
99 W 10th, Eugene

The second of three scheduled UGB deliberations by the Eugene Planning Commission will be held on April 17th (Monday). Monday’s deliberations will focus on the proposed Clear Lake Overlay Zone, which seeks to meet our community vision of ample economic opportunities for all community members while addressing concerns related to environmental justice and neighborhood livability.

**Meeting Materials**
**Webcast**

**Updates to the Clear Lake Overlay Zone**

The Envision Eugene team has been working to address concerns that were raised by members of the public related to the Clear Lake Overlay Zone. Changes have been suggested to improve long-term preservation of large industrial lots and clarify language where needed. A full list of the changes that have been proposed is included in the Planning Commission meeting materials.

**Future Deliberations**

Deliberations will continue through early May and are scheduled as shown below:

**Eugene Planning Commission**
April 24th, 11:30 am - 1:30 pm
Sloat Room, Atrium Building
99 W 10th, Eugene

**Lane County Planning Commission**
May 2nd, 6 pm
Goodpasture Room
Lane County Customer Service Center
3050 N Delta Hwy, Eugene

**Transportation Systems Plan**

**Public Hearing April 17th**

This is a reminder that the second joint public hearing on Eugene’s 2035 Transportation System Plan will take place on Monday, April 17 at 5:30 PM in Harris Hall located at 125 East 8th Avenue.

To submit testimony for consideration by the City Council and the County Board of Commissioners, you may testify at the public hearing or email your testimony by...
Fair Housing Training

Community members are invited to come and learn about fair housing rights and resources applicable to Eugene residents at this event, presented by staff from the Fair Housing Council of Oregon.

**Know Your Rights Fair Housing Training**  
April 25th, 6:15 - 7:30 pm  
Eugene Public Library: Bascom Room

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Envision Eugene Newsletter

What's New with Envision Eugene?

April 21st, 2017

This week's newsletter includes a reminder that Planning Commission deliberations on the urban growth boundary (UGB) continue Monday. We have also included an announcement about a research opportunity you may be interested in. You can always visit our website to get the latest information about Envision Eugene.

www.envisioneugene.org

UGB Deliberations Continue

The Eugene and Lane County Planning Commissions will continue deliberating on the proposed UGB adoption package over the next couple of weeks. At the end of their
deliberations they will make a recommendation on UGB adoption to their respective elected bodies - the Eugene City Council and the Lane County Board of Commissioners.

Next Deliberations

**Eugene Planning Commission**
Monday April 24th, 2017  
11:00 am - 2:00 pm *(Extended)*  
Seloat Room, Atrium Building  
99 W 10th, Eugene

Last week the Eugene Planning Commission focused on the Clear Lake Overlay Zone, including updates that were made in response to public testimony. An archived webcast of their meeting can be viewed [online](http://myemail.constantcontact.com/UGB-Deliberations-Continue-Monday.html?soid=1123418754250&aid=zB6yf5bfoV0). Next Monday the Eugene Planning Commission will continue deliberating on the Clear Lake Overlay Zone at an **extended** Planning Commission meeting before they continue on to the residential portion of the UGB proposal.

Meeting Materials

Webcast

Future Deliberations

**Lane County Planning Commission**
May 2nd, 6 pm  
Goodpasture Room  
Lane County Customer Service Center 3050 N Delta Hwy, Eugene

**UO Livability Focus Groups**

Do you have opinions about what makes your community livable? If so, researchers at the University of Oregon are interested in hearing from you.

The term “livability” is frequently used and promoted by communities across the United States. In Oregon, various local communities, including some state agencies, seek to improve livability. **But what is it?** The Community Service Center at the University of Oregon wants to know what you think livability is, specifically as it relates to transportation and land use patterns in your neighborhood. This survey will help Oregon governments and organizations better understand your community’s needs and preferences.

If you would like to share your opinions, we invite you to participate in a focus group. We will be holding focus groups on Thursday, May 4th from 4:30 PM to 6:00 PM in Eugene at **942 Olive Street** (next to LCC downtown) and on Thursday, May 11th from 2:30 PM to 4:00 PM in Springfield at the **Springfield Public Library**. Please fill out the RSVP survey, linked below, so we will know if you are available to attend.

RSVP
The focus group will be 90 minutes in length with a short break halfway through. Light refreshments will be provided and we will hold a raffle for an opportunity for participants to win a gift certificate. If you have questions, please contact Bob Parker (rgp@uoregon.edu).

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Envision Eugene Newsletter

Additional UGB Deliberations Scheduled

The Eugene Planning Commission will finish their deliberations and finalize their recommendation on the proposed UGB adoption package at an additional session scheduled for tomorrow evening, April 25th at 5pm. Members of the public are welcome to attend or watch the meeting online.

Eugene Planning Commission
April 25, 5pm
Sloat Room, Atrium Building
99 W 10th, Eugene

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Envision Eugene Newsletter

What's New with Envision Eugene?

April 27th, 2017

The Eugene Planning Commission has made its recommendation on the urban growth boundary (UGB) proposal. The Envision Eugene Team is extremely grateful for all of the volunteer hours they have committed to this process on behalf of our community. This newsletter provides a brief overview of their recommendation and the next steps from here. You can learn more about Envision Eugene and the UGB adoption process by visiting our website.

www.envisioneugene.org

Planning Commission Recommendation

On April 24th, the Eugene Planning Commission met to continue their deliberations on the UGB adoption package. Specifically, they discussed revisions to the proposed Clear...
Lake Overlay Zone and how it can strike an appropriate balance between local economic opportunities and environmental justice. In order to provide enough time for discussion, an additional meeting was scheduled for April 25th. An archived webcast of the April 24th meeting is available on the web.

At the April 25th meeting, Planning Commissioners completed their deliberations on the Clear Lake Overlay Zone and voted 6-0 to recommend that City Council adopt the jobs, parks and schools ordinance (the policy that would set our UGB for jobs, parks and schools) as revised through their deliberations. Additionally, they voted 5-1 to recommend that the City Council adopt the Residential Ordinance (the policy that would set our UGB for housing) as revised through their deliberations.

April 25 Meeting Materials

April 25 Webcast

Finally, the Planning Commission voted 6-0 for staff to prepare a draft memo to the City Council from the Planning Commission, recommending that the Council specifically consider the points listed in Attachment C of the April 25 meeting materials and a few other points identified during the meeting. Staff will develop the memo for review and approval at an upcoming Planning Commission meeting before it is forwarded to Council.

Next Deliberations

Lane County Planning Commission
May 2nd, 6 pm
Goodpasture Room
Lane County Customer Service Center
3050 N Delta Hwy, Eugene

The Lane County Planning Commission will meet next Tuesday, May 2nd to discuss the UGB adoption package and make their recommendation on adoption to the Lane County Board of Commissioners. Members of the public are welcome to attend. There is no webcast available for County Planning Commission Meetings. Meeting materials will be posted on their website when available (click the "learn more" link below).

Learn More

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Envision Eugene Newsletter

What's New with Envision Eugene?
May 4th, 2017

This newsletter provides an update on the urban growth boundary (UGB) adoption process and our anticipated next steps following the Lane County Planning Commission vote this week to recommend approval of the proposed UGB. We have also included an announcement about Jane's Walks, a neighborhood walk festival happening this weekend.

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Planning Commission Recommendations

On May 2nd the Lane County Planning Commission voted unanimously (6-0) to recommend to their elected body, the Board of County Commissioners, adoption of the jobs, parks, and schools ordinance and the residential ordinance. The first ordinance would establish Eugene's UGB and add land for jobs, parks, and schools, and the
second ordinance would adopt the land supply study for homes, including strategies to increase medium and high density housing. It is anticipated that an updated version of the UGB proposal reflecting the Planning Commissions’ recommendations will be published next week.

With both Planning Commissions’ support for the UGB proposal, the process moves to the next phase with the Eugene City Council and the Board of County Commissioners. These two bodies will hold work sessions, a joint public hearing and deliberations before making a decision on adopting the proposed UGB. You are encouraged to follow this process and provide testimony on the proposal.

Important Dates

May 24th, 2017 - Eugene City Council work session
June 12th, 2017 - Eugene City Council work session
June 13th, 2017 - Board of County Commissioners work session
June 27th, 2017 - Joint Work Session and Public Hearing
The 2nd annual Jane’s Walk festival in Eugene takes place this weekend. There will be free, citizen-led walking tours happening across the city. Come out and celebrate healthy, walkable, and livable neighborhoods with your friends and neighbors!

Learn More

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Envision Eugene Newsletter

What's New with Envision Eugene?
May 11th, 2017

With both Planning Commissions having made their recommendations on Urban Growth Boundary (UGB) adoption, we have published Version 2 of the UGB Adoption Package, which reflects their suggestions. This newsletter provides links to Version 2 and an update on the urban growth boundary adoption process with important upcoming dates. You can always find the latest information about Envision Eugene on our website.

www.envisioneugene.org

UGB Adoption Package: Version 2 on the Web
We have published Version 2 of the UGB Adoption Package. Version 2 reflects the Planning Commission’s recommendation and modifications to the adoption package as a result of public testimony heard during the Planning Commission process, Planning Commissioner suggestions, and staff edits for clarity and accuracy. The full adoption package for both the City and County can be viewed in the document center on our website.

The full UGB Adoption Package is over 1,000 pages long and contains many documents. In order to help folks navigate this lengthy proposal, we have broken it down by topic and specific document on the Adopting Our UGB page of our website. This is the place to go if you are looking for an overview of what is contained in the UGB Adoption Package or you are looking for a specific document.

View the Entire Package   View Individual Documents

The most significant edits from the Planning Commission process were made to the proposed Clear Lake Overlay Zone. These revisions were made to increase preservation of large lots in the employment expansion area. For more details, see the revised overlay zone.

Council and Board of Commissioners Process

Version 2 of the UGB Adoption Package (the Planning Commission recommendation version) will be the focus of review during the Eugene City Council and County Board of Commissioners phase of the UGB adoption process. This phase starts today, with publication of Version 2 of the Adoption Package. Work sessions will be held with both elected bodies, followed by a joint public hearing. The Lane County Board of Commissioners and the Eugene City Council will then hold deliberation meetings before making their decisions.
Important Dates

May 24th, 2017 - Eugene City Council work session
June 12th, 2017 - Eugene City Council work session
June 13th, 2017 - Board of County Commissioners work session
June 27th, 2017 - Joint City and County Work Session and Public Hearing

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We wanted to provide you with the latest information on our UGB adoption schedule with the Eugene City Council and the Lane County Board of Commissioners. Our first work session with City Council has been rescheduled to June 12th. There will not be a work session on May 24th as previously communicated. You can always find the latest information about Envision Eugene on our website.

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Important Dates

Eugene City Council
Work Session

Board of County Commissioners
Work Session
New Date for the 1st UGB Work Session with City Council

June 12th, 5:30 pm
Harris Hall, 125 E 8th, Eugene

June 13th, Time TBD
Harris Hall, 125 E 8th, Eugene

Joint City and County
Work Session and Public Hearing
June 27th, 5:30 pm
Harris Hall, 125 E 8th, Eugene

Reminder: Version 2 of the UGB Adoption Package,
the Planning Commissions' Recommendation, is on the web.

UGB Adoption Package Version 2

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Envision Eugene Newsletter

What's New with Envision Eugene?
May 26th, 2017

As we transition from the Planning Commission phase of the urban growth boundary (UGB) adoption process to the City Council and Board of County Commissioners phase, we want to highlight some of the adjustments that were made to the documents that support adoption of our UGB - the UGB Adoption Package. This week’s newsletter focuses on the Clear Lake Expansion area and the Clear Lake Overlay Zone where the majority of the adjustments to the UGB Adoption Package were made. You can always find more information about Envision Eugene on our website.

www.envisioneugene.org

The Clear Lake Expansion Area

As part of adopting our own UGB, we are proposing two modest expansions for jobs, parks and a school. This video provides an overview of the proposed expansion areas.

The larger of the two proposed expansion areas is around Clear Lake Road, where an additional 924 acres would provide space for 3,000 jobs, a 222 acre community park, and a much needed school for the Bethel community.

The Clear Lake Overlay Zone, a proposed new land use tool, was developed to protect...
neighborhood livability and the large lots in the area. The first draft of the Clear Lake Overlay Zone was modified during the Planning Commission phase of the UGB adoption process in response to public testimony, and Planning Commissioner suggestions. The intent of these changes is to make it harder to divide large lots in the overlay zone, adjust the prohibited uses, and make the new code easier to administer. The latest version of our Clear Lake Fact Sheet contains a summary of the changes that were made.

How, Where and When to Expand?

Oregon land use law and our community vision call for sensitive expansion of Eugene's urban area. This is why we can only expand when and where there is a documented need, being mindful of sensitive wetlands, and high value farm and forest land. Our technical analysis shows that both the Clear Lake and the Santa Clara expansion areas will minimize impacts on the natural environment, while supporting our community's needs and balancing the pillars of Envision Eugene.

UGB Work Sessions

During this phase of the UGB adoption process both the Eugene City Council and the Lane County Board of Commissioners will hold separate work sessions on the proposal before holding a joint work session and public hearing, scheduled for June 27th. Members of the public are welcome to attend these sessions to learn more about what is contained in the UGB Adoption Package.

Eugene City Council 
Work Session 
June 12th, 5:30 pm 
Harris Hall, 125 E 8th, Eugene

Lane County Bard of Commissioners 
Work Session 
June 13th, Time TBD 
Harris Hall, 125 E 8th, Eugene

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What's New with Envision Eugene?

June 2nd, 2017

With just over a week to go before our first urban growth boundary (UGB) work session with City Council, we want to continue highlighting the important topics we heard about during the Planning Commission phase of the UGB adoption process. This week's newsletter focuses on the topic of housing and how we are addressing our housing needs through the UGB adoption package and through work that will come after adoption. You can always find more information about Envision Eugene on our website.

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Accommodating Our Housing Need

Our analysis shows that we have enough space within our existing UGB to accommodate 20 years of housing, if we pursue the housing strategies included in the UGB Adoption Package. For this reason, the UGB proposal does not include an expansion for housing.

In October, the Eugene City Council gave staff direction to accommodate Eugene's
anticipated multi-family development using two strategies:

1. Continue existing downtown development incentives and programs
2. Increase the minimum density in the R-2 zone

These strategies are part of the UGB proposal, as are the studies about how much residential land we need and have for the next 20 years. Check out the multi-family page on our website to learn more about our housing need, or the adopting our UGB page to learn more about the adoption package.

Future Work
Adopting our UGB will allow us to move onto three important initiatives related to housing: urban reserve planning (planning for 20+ years of growth), updating our clear and objective standards for needed housing, and starting the growth monitoring program. These initiatives will help us ensure that we have enough land and the right policies to support the kind of development Eugenians have said they want as part of Envision Eugene. This future work will use the latest data on our community, such as newer population forecasts from Portland State University and more recent development trends.

Housing Affordability

Housing affordability is an important issue in our community that has been consistently raised throughout the Envision Eugene process. In fact, an entire pillar of Envision Eugene is dedicated to the topic: “Provide Housing Affordable to all Income Levels.” Housing affordability is a multifaceted topic impacted by many factors. Here are some of the strategies we are working on to support housing affordability:

- Provide economic opportunities so that residents have the income to support their housing needs.
- Plan for a citywide buildable land supply that includes flat land, which is cheaper to build on.
- Promote compact urban development to reduce the cost of infrastructure required to serve development, which is passed onto residents.
- Support preservation and maintenance of existing housing stock, which tends to be more affordable than new buildings.
- Plan for more multi-family housing, which tends to be more affordable than single family homes.
- Expand housing variety and choice to accommodate smaller families and single individuals looking for smaller, more affordable homes.
- Support subsidized housing programs and projects to create a range of stable, safe, and affordable housing opportunities for area residents.
- Advocate for housing affordability issues at the state level.
- Establish a monitoring program to evaluate our progress and determine if adjustments are necessary to achieve our housing affordability goals.

Together, we hope these strategies will achieve our affordability goals. To learn more about housing affordability in Eugene you can check out our housing infographic or read the Eugene-Springfield Consolidated Plan.
Reminder: UGB Work Sessions

This is a reminder of the upcoming Eugene City Council and the Lane County Board of Commissioners UGB work sessions. Members of the public are welcome to attend these sessions to learn more about what is contained in the UGB Adoption Package.

**Eugene City Council Work Session**
June 12th, 5:30 pm
Harris Hall, 125 E 8th, Eugene

**Lane County Board of Commissioners Work Session**
June 13th, Time TBD
Harris Hall, 125 E 8th, Eugene

Public Hearing

On **June 27th** the Eugene City Council and Lane County Board of Commissioners will hold a joint work session and public hearing. Members of the public are encouraged to attend, learn about the UGB proposal, and provide testimony.

**Joint Work Session and Public Hearing**
June 27th
Work Session: 5:30 pm*
Public Hearing 6:30 pm
Harris Hall, 125 E 8th, Eugene

*Staff and information stations available starting at 5pm

How to Provide Testimony
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Envision Eugene Newsletter

What's New with Envision Eugene?

June 8th, 2017

The first City Council and County Board of Commissioners work sessions on the adoption of Eugene's urban growth boundary (UGB) are next week! As we enter this important phase of Envision Eugene, we continue to revisit some of the conversations we have had with members of the community related to adopting our UGB. This week's newsletter focuses on the topic of data and assumptions used to set our UGB, and how they compare to emerging development trends. It also includes information about upcoming dates and events, including an Envision Eugene Drop-In Session on June 15th. You can always find more information about Envision Eugene on our website.

www.envisioneugene.org
Data and Assumptions

In order to set our UGB for twenty years of growth, certain assumptions and models were used to determine just how much land is required to support our community vision. Things like the number of jobs we expect to attract, our predicted population growth, and the assumed household size all impact how much land we will need for homes, jobs, parks, and schools. You can learn more about these assumptions in our Population and Demographics Fact Sheet.

We know people are concerned about some of our assumptions, including population forecasts and housing mix (the ratio of single family detached homes to multifamily dwellings), and how they compare to recent reports about what is currently taking place in our community. We know that 2012, the year our assumptions are based on, feels like a long time ago. In order to move forward with creating our own UGB, Council gave us direction to use the adopted population forecasts in 2012 and reaffirmed this direction in 2015, so that we could set our baseline UGB. Updating our assumptions now would set us back a number of years. In addition, updating one assumption means you have to update them all because they all interrelate.

Monitoring and Adjusting - Flexible Implementation

Setting our UGB allows us to begin monitoring – an important program that will allow us to adapt to emerging trends. Setting our UGB also allows us to begin urban reserve planning using the most recent population forecasts. If our previous population forecasts or housing mix are off, we will be better prepared to consider necessary changes to implement our community vision and values.

Drop-In Session

Come learn about this phase of the UGB adoption process. The Envision Eugene Team will be on hand to answer your questions about the process, what has changed with Version Two of the UGB Adoption Package, and how you can get involved in the adoption process.

Envision Eugene Drop-In Session
June 15th, 4-6 pm
Atrium Lobby
99 W 10th Ave. Eugene

Reminder: UGB Work Sessions

This is a reminder of the upcoming Eugene City Council and the Lane County Board of Commissioners UGB work sessions. Members of the public are welcome to attend these sessions to learn more about what is contained in the UGB Adoption Package or watch them online.
Reminder: Public Hearing

On June 27th the Eugene City Council and Lane County Board of Commissioners will hold a joint work session and public hearing. Members of the public are encouraged to attend, learn about the UGB proposal, and provide verbal testimony.

Joint Work Session and Public Hearing
June 27th
Work Session: 5:30 pm*
Public Hearing: 6:30 pm
Harris Hall, 125 E 8th, Eugene

*Staff and information stations available starting at 5pm

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Envision Eugene Newsletter

What's New with Envision Eugene?
June 14th, 2017

With two work sessions completed early this week and a drop-in session tomorrow, we are making strides toward adopting Eugene’s own urban growth boundary (UGB) and implementing our community vision. This newsletter contains a brief overview of the two work sessions and a reminder about the drop-in event tomorrow. You can find more information about Envision Eugene on our website.

www.envisioneugene.org

http://myemail.constantcontact.com/Drop-in-Session-Tomorrow-.html?soid=11234187542... 6/19/2017
Work Sessions

The Envision Eugene Team was in Harris Hall twice this week, presenting the UGB proposal to the Eugene City Council on Monday, and the Lane County Board of Commissioners on Tuesday. While both elected bodies have seen portions of the UGB proposal before, these work sessions mark the beginning of their formal adoption process. Recordings of both work sessions can viewed online. The City Council webcast is available here and the County Board of Commissioners webcast is available here.

Urban Growth Boundary Adoption Process

1. City Planning Commission
   - Work Sessions
   - Public Hearing
   - Deliberations
   - Recommendations
   - Public Comment

2. Eugene City Council
   - Work Sessions
   - Public Hearing
   - Deliberations
   - We Are Here
   - Public Comment

Final Decisions
Reminder: Drop-In Session on Thursday!

Come learn about the UGB adoption process. The Envision Eugene Team will be on hand to answer your questions about the process, changes in the UGB Adoption Package as a result of the Planning Commissions' work, and how you can express your views on the UGB proposal to the City Council and the Board of County Commissioners.

Envision Eugene Drop-In Session
June 15th, 4-6 pm
Atrium Lobby
99 W 10th Ave. Eugene

Reminder: Public Hearing

On June 27th at 6:30 pm the Eugene City Council and Lane County Board of Commissioners will hold a joint public hearing on the UGB proposal. Members of the public are encouraged to attend and provide testimony. Members of the public are also encouraged to attend a pre-hearing open house with City and County Planning staff starting at 5 pm and a staff presentation about the UGB proposal at 6 pm.

June 27th
Harris Hall, 125 E 8th, Eugene

NEW TIMES
Open House: 5:00 pm
Presentation: 6:00 pm
Public Hearing 6:30 pm

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Findings in Support of
An Ordinance Concerning Long-Range Transportation Planning
(Adopting the Eugene 2035 TSP; Amending the Metro Plan, TransPlan, Eugene Code Chapter 9, Ordinance No. 20528, and the Eugene Street Classification Map; and Repealing the 2003 Central Area Transportation Study)

Overview

For decades the Eugene-Springfield metropolitan area had a shared regional comprehensive plan and regional transportation system plan, known as the Metro Plan and TransPlan. These plans guided transportation decisions for both Eugene and Springfield inside a shared urban growth boundary. For both cities, TransPlan functioned as the Local Transportation System Plan and the Regional Transportation System Plan. In 2007, the Oregon Legislature passed House Bill 3337, which required Eugene and Springfield to develop separate urban growth boundaries. As a result, Eugene began the Envision Eugene project, including Eugene-specific transportation planning. Additionally, in October 2008, the State’s Land Conservation and Development Commission approved a regional work plan to prepare and adopt a TransPlan update to address federally mandated regional transportation planning requirements. So that each city’s local transportation system plans could serve as the backbone of the regional TransPlan update, the cities of Eugene, Springfield and Coburg undertook local transportation planning efforts in advance of the TransPlan update. Within the last few years the cities of Springfield and Coburg have adopted their local transportation system plans (both co-adopted by Lane County); once the Eugene 2035 Transportation System Plan (2035 TSP) is adopted, the region’s TransPlan update will move forward.

The 2035 TSP meets state requirements for a local transportation system plan and is a resource for future transportation decision making within the City of Eugene. The 2035 TSP identifies the preferred future multi-modal transportation system and articulates the City’s goals and policies related to this transportation system. It also identifies the function, capacity, and location of future facilities, and identifies planning-level costs for improvements needed to support expected development and growth, and possible sources of system funding. The 2035 TSP is intended to provide the City with flexibility as critical transportation investments are prioritized and funded.

The 2035 TSP ensures the vision for the transportation system meets community needs, communicates the City’s aspirations, conforms to state and regional policies, and provides an infrastructure and program plan to meet these community, regional, and state needs. The 2035 TSP includes a total of 6 chapters, including: Chapter 1 – Introduction; Chapter 2 – Goals, Policies, and Actions; Chapter 3 – Needs Assessment and Evaluation; Chapter 4 – Creating Multimodal Systems; Chapter 5 – Transportation Priorities and Project Categories; and Chapter 6 – Transportation Funding and Implementation.

While reflective of Eugene’s current planning work, the 2035 TSP is a component of the Eugene-Springfield Metropolitan Area General Plan (Metro Plan) and is being adopted as part of the Metro Plan. The findings that follow demonstrate that the 2035 TSP, and the entire 2035 TSP adoption package, is consistent with applicable approval criteria. The 2035 TSP adoption package consists of:

1. The Eugene 2035 Transportation System Plan
2. Conforming amendments to the Metro Plan
3. Conforming amendments to TransPlan
4. Conforming amendments to Eugene Code Chapter 9
5. Amendment to Eugene Ordinance No. 20528 to delete section 67 (to remove the limitation on trips)
6. Repeal of Eugene 2003 Central Area Transportation Study (CATS)
7. Eugene Street Classification Map amendments.

I. **Metro Plan Amendments, TransPlan Amendments and 2035 TSP Adoption (“the amendments”)**

Amendments to the *Metro Plan* and *TransPlan* and adoption of the 2035 TSP are all governed by the *Metro Plan* amendment approval criteria. Eugene and Lane County have identical approval criteria for *Metro Plan* amendments (below), set forth in Eugene Code 9.7735 and Lane Code 12.225.

(1) The proposed amendment is consistent with the relevant Statewide Planning Goals; and
(2) The proposed amendment does not make the *Metro Plan* internally inconsistent.
(3) When the city-specific local comprehensive plan also applies, the proposed amendment is consistent with the city-specific local comprehensive plan.

Throughout the findings set forth below, the 2035 TSP and the conforming *Metro Plan* and *TransPlan* amendments are collectively referred to the “2035 TSP” or “the amendments.”

(1) **The amendment is consistent with applicable statewide planning goals adopted by the Land Conservation and Development Commission.**

**Goal 1 - Citizen Involvement.** To develop a citizen involvement program that insures the opportunity for citizens to be involved in all phases of the planning process.

The City of Eugene and Lane County have acknowledged citizen involvement programs and acknowledged processes for securing citizen input on all proposed *Metro Plan* amendments. The governing bodies’ codes require that notice of the proposed amendments be given and public hearings be held prior to adoption. Notification of the proposed amendments and opportunities for public participation in these amendments were consistent with the acknowledged citizen involvement programs.

This goal was met through an extensive public involvement process. A Community Involvement Strategy for the update of the Eugene Transportation System Plan was developed in preparation of the project. This Program was reviewed and endorsed by the Eugene Planning Commission, which acts as the Committee for Citizen Involvement. The program outlined the information, outreach methods, and involvement opportunities available to the citizens during the process. Information was distributed and input solicited throughout the process. Opportunities for engagement included: a project website (including web-based surveys); targeted outreach with local community service organizations and Planning Commission, Sustainability Commission, and City Council.

During preparation of the draft TSP, a Transportation Community Resource Group (TCRG) was created to invite participation from many of the original members of the Envision Eugene Community Resource Group (CRG), the Pedestrian and Bicycle Master Plan project advisory committee, the city’s standing
Bicycle and Pedestrian Advisory Committee (BPAC), a multi-agency Technical Advisory Committee, staff from the Oregon Department of Land Conservation and Development (DLCD) and Department of Transportation (ODOT), Lane County staff, and the public at large. The TCRG spent years studying and providing advice to staff on land use planning, bicycle and pedestrian planning, transit planning, demand management techniques, street design, traffic congestion, sustainability, efforts to reduce greenhouse gas emissions, and transportation funding. The TCRG was instrumental in creating the goals, policies, potential action items, and project lists for the draft TSP.

The Eugene and Lane County Planning Commissions public hearing on the proposal was duly noticed to all neighborhood organizations, community groups and individuals who have requested notice, as well as to the City of Springfield. Additionally, notice was set to each individual that received notice of Eugene Ordinance No. 20528 and to everyone that owns property on a street that is proposed to be reclassified. Notice of the public hearing was also published in the Register Guard. The Eugene City Council and Lane County Board of Commissioners joint public hearing to consider approval, modification, or denial of the amendments was duly noticed. These processes afford ample opportunity for citizen involvement consistent with Goal 1.

As a result of this extensive public involvement process, the proposed amendments meet the requirements of Goal 1.

Goal 2 - Land Use Planning. To establish a land use planning process and policy framework as a basis for all decisions and actions related to use of land and to assure an adequate factual basis for such decisions and actions.

The Eugene-Springfield Metropolitan Area General Plan (Metro Plan) is the policy tool that provides a basis for decision-making in this area. The Metro Plan was acknowledged by the State in 1982 to be in compliance with statewide planning goals, and again after periodic review in 2004. This amendment to the Metro Plan is undertaken to adopt the 2035 TSP in a manner consistent with current conditions and citizen values. The amendment to the Metro Plan to recognize the 2035 TSP is being processed as a Type II procedure, which requires any applicable statewide planning goals, federal or state statutes or regulations, Metro regulations, comprehensive plan policies, and City's implementing ordinances be addressed as part of the decision-making process. Upon adoption, the 2035 TSP will replace TransPlan as Eugene’s local TSP. Because TransPlan remains a refinement to the Metro Plan and will continue to serve as the Regional Transportation System Plan (RTSP) until the RTSP is updated (per an LCDC work plan), the adopted performance measure in TransPlan are still applicable.

These findings and the record show that there is an adequate factual base for the City's and County's decision concerning the amendments. Goal 2 requires that plans be coordinated with the plans of affected governmental units and that opportunities be provided for review and comment by affected governmental units. The Goal 2 coordination requirement is met when the adopting governmental bodies engage in an exchange, or invite such an exchange, between the adopting bodies and any affected governmental unit and when the adopting bodies use the information obtained in the exchange to balance the needs of the citizens. To comply with the Goal 2 coordination requirement, the two jurisdictions coordinated the review of these amendments with all affected governmental units. Notice of the proposed amendments and information about where the materials would be available for review was mailed to all parties that had requested such notice.

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There are no Goal 2 exceptions required for the amendments. Therefore, the amendments are consistent with Statewide Planning Goal 2.

**Goal 3 - Agricultural Lands.** To preserve agricultural lands.

The statewide planning goals relate to agricultural lands in Oregon and is not applicable to the proposed amendments.

**Goal 4 - Forest Lands.** To conserve forest lands.

The statewide planning goal relate to forest lands in Oregon and is not applicable to the proposed amendments.

**Goal 5 - Open Spaces, Scenic and Historic Areas, and Natural Resources.** To conserve open space and protect natural and scenic resources.

OAR 660-023-0250(3) provides: Local governments are not required to apply Goal 5 in consideration of a PAPA unless the PAPA affects a Goal 5 resource. For purposes of this section, a PAPA would affect a Goal 5 resource only if:

(a) The PAPA creates or amends a resource list or a portion of an acknowledged plan or land use regulation adopted in order to protect a significant Goal 5 resource or to address specific requirements of Goal 5;
(b) The PAPA allows new uses that could be conflicting uses with a particular significant Goal 5 resource site on an acknowledged resource list; or
(c) The PAPA amends an acknowledged UGB and factual information is submitted demonstrating that a resource site, or the impact areas of such a site, is included in the amended UGB area.

These amendments do not create or amend the City’s list of Goal 5 resources, do not amend a code provision adopted to address specific requirements of Goal 5, do not allow new uses that could be conflicting uses with a significant Goal 5 resource site and do not amend the acknowledged urban growth boundary. Therefore, Statewide Planning Goal 5 does not apply.

**Goal 6 - Air, Water and Land Resource Quality.** To maintain and improve the quality of the air, water and land resources of the state.

Goal 6 addresses waste and process discharges from development, and is aimed at protecting air, water and land from impacts from those discharges. The amendments to not affect the City’s ability to provide for clean air, water or land resources. The 2035 TSP was developed following the rules and guidance found in Oregon Revised Statute 660-012 and the Central Lane MPO Regional Transportation Plan (RTP). Both outline strategies for decreasing vehicle miles traveled and single-occupancy vehicle trips, which are intended to help improve air quality in the Central Lane MPO Area.
The 2035 TSP contains policies related to development along key multi-modal corridors, transportation demand management and the encouragement of transportation without reliance on automobiles, including transit, bicycles, and pedestrian travel. The 2035 TSP incorporates the Eugene Climate Recovery Ordinance goal of by year 2030 reducing community-wide use of fossil fuels by 50 percent compared to 2010 usage. This goal and policies are related to the need to maintain and improve the air quality in the metropolitan area. Projects identified in the 2035 TSP will be designed and constructed in accordance with applicable federal, state, and local regulations.

Additionally, from 2013 to mid-2015 the City participated in a scenario planning process led by the Central Lane MPO. The scenario planning process examined how transportation policies might affect equity, public health, economic vitality, and greenhouse gas emissions in the region. The state required the project partners to examine at least one scenario that would achieve a 20 percent reduction (below 2005 emissions levels) in greenhouse gas emissions from light vehicles. Generally, the 20 percent greenhouse gas emission reduction target of the scenario planning study is consistent with the goal of the Climate Recovery Ordinance. While the preferred scenario selected by the Central Lane MPO is not a statement of regional policy and the strategies are not intended to be directive or regulatory, the 2035 TSP incorporates and advances many of the strategies identified by the Central Lane MPO as a way of achieving the preferred scenario. Some specific examples of how the 2035 TSP advances the preferred scenario strategies are as follows:

1. The 2035 TSP plans for significant investment in active transportation over the next 20 years. (Active transportation strategies #1 & #2)
   - Of the 264 projects planned in the 2035 TSP to be built over the next 20 years (excluding those to be built upon development), 239 of the projects are entirely pedestrian and bicycle projects; those projects include 89 neighborhood greenways, 22 on-street bike lanes, 18 shared use paths, 12 protected bike lanes, and 85 separated path/sidewalk projects.
   - Six of the 264 projects are transit projects, which include improving frequent transit service and multimodal travel along numerous transit corridors.
   - These 245 bicycle, pedestrian, and transit projects represent 51% of the total transportation dollars that are planned to be spent over the next 20 years.
   - Of the 19 remaining projects, 6 of the projects are complete street upgrades to existing roadways; all 6 of these projects have a significant bicycle and pedestrian component. These complete street projects represent an additional 10% of the total transportation dollars.
   - Not counting the three rail projects (which amount for 6% of the total transportation dollars), only three projects planned for the next 20 years have no explicit bicycle, pedestrian, or transit component contained in their project descriptions. These three projects represent approximately 8% of the total transportation dollars that are planned to be spent over the next 20 years.

2. Establishment of a bike share program is currently underway and is one of the 2035 TSP’s four bicycle policies. (Active transportation strategy #3)

3. Identified potential action items for meeting 2035 TSP policy objectives include providing education and awareness programs, such as SmartTrips and school-based transportation options (including Safe Routes to School) to improve safety for all travelers and providing support for Safe Route to School programs and other programs that create safe walking
conditions between residences and schools and other neighborhood destinations. (Active transportation strategy #5, Education and marketing strategy #1).

4. A system-wide policy of the 2035 TSP is fostering neighborhoods where Eugene residents can meet most of their basic daily needs without an automobile by providing streets, sidewalks, bikeways, and access to transit in an inviting environment where all travelers feel safe and secure. The related potential action item is the creation of a strategy to facilitate 90 percent of Eugene residences to be within 20-minute neighborhoods. (Active transportation strategy #6)

5. The 2035 TSP policies promote improved transit services that are integrated through context specific multimodal planning for all Key Corridors. One of the four transit policies in the 2035 TSP is to collaborate with Lane Transit District to provide a network of high capacity, frequent, and reliable transit services, including consideration of Bus Rapid Transit, to the City’s identified Key Corridors and to Frequent Transit Corridors as defined by Lane Transit District’s Long Range Transit Plan. Additionally, the 2035 TSP includes $171.4 million in transit projects that support the transit policies and the identified transit needs. (Transit strategies #3 and #4).

6. The six multimodal/transit projects planned for the next 20 years include the improvement of frequent transit service and multimodal travel along Coburg Road, River Road, Highway 99, 30th Avenue and Amazon Parkway, new transfer stations, and enhanced pedestrian crossings. Additionally, an identified potential action item is to review City Code and amend it if needed to enable additional opportunities to provide bikeways and improved pedestrian connections between key destinations, transit stops, and residential areas with new development and redevelopment. (Transit strategies #5 and #7).

7. Identified potential action items include aligning the City’s land use and parking regulating to encourage walking, biking, and use of public transit and periodically reviewing parking needs in the downtown, Federal Courthouse, and riverfront districts and balance supply with other objectives, such as economic vitality; support for transit, walking, and biking; reduced consumption of fossil fuels; and human-scaled urban form. Additionally, for more than 10 years the City has had in place Standards for Transportation Demand Management Programs that provide a mechanism to vary the number of required off-street parking spaces by providing a strategy for reducing vehicle use and parking demand and using benchmarks to measure program effectiveness. (Parking management strategy #2)

8. The 2035 TSP recognizes the Regional Transportation Options Plan (RTOP) adopted by the Central Lane MPO as the regional guidance for programs that reduce reliance on single-occupancy vehicles and identifies seven key programs and services, including: SmartTrips individualized marketing programs to encourage active transportation choices; School-Based Transportation Options: Build off existing Safe Routes to School programs to include coordinated program with ridesharing and transit promotion and expand the program to middle and high schools; Rideshare (carpooling and vanpooling); and, LTD’s Group Bus Pass program. (Education and marketing strategies #1, 3, and #6)

As a result, the proposed amendments are in compliance with Goal 6.
**Goal 7 - Areas Subject to Natural Disasters and Hazards.** To protect life and property from natural disasters and hazards.

Goal 7 requires that local government planning programs include provisions to protect people and property from natural hazards such as floods, landslides, earthquakes and related hazards, tsunamis and wildfires. The Goal prohibits a development in natural hazard areas without appropriate safeguards. The amendments do not affect the City’s restrictions on development in areas subject to natural disasters and hazards. Further, the amendments do not allow for new development that could result in a natural hazard. Therefore, Statewide Planning Goal 7 does not apply.

**Goal 8 - Recreational Needs.** To satisfy the recreational needs of the citizens of the state and visitors, and where appropriate, to provide for the siting of necessary recreational facilities including destination resorts.

Goal 8 ensures the provision of recreational facilities to Oregon citizens and is primarily concerned with the provision of those facilities in non-urban areas of the state. Goal 8 also allows, but does not require, the City to create an inventory of recreational needs. The amendments do not affect the current provisions for recreation areas, facilities or recreational opportunities, nor will the amendments affect access to existing or future recreational facilities. Further, the amendments do not change the Metro Plan and TransPlan policies that support access to recreational facilities with the Metropolitan area and to recreations opportunities outside the area or delete any planned transportation projects that would make recreational facilities more available. Therefore, the amendments are consistent with Goal 8.

**Goal 9 - Economic Development.** To provide adequate opportunities throughout the state for a variety of economic activities vital to the health, welfare, and prosperity of Oregon’s citizens.

Goal 9 requires cities to evaluate the supply and demand of commercial and industrial land relative to community economic objectives. The Administrative Rule for Statewide Planning Goal 9 (OAR 660 Division 9) requires that the City “provide for at least an adequate supply of sites of suitable sizes, types, location, and service levels for a variety of industrial and commercial uses consistent with plan policies.” Among other things, the rule requires that cities complete an “Economic Opportunities Analysis.” OAR 660-009-0015. Based on the Economic Opportunities Analysis, cities are to prepare Industrial and Commercial Development Policies. OAR 660-009-0020. Finally OAR 660-009-0025 requires that cities designate industrial and commercial lands sufficient to meet short and long term needs. OAR 660-009-0010(2) provides that the detailed planning requirements imposed by OAR 660 Division 9 apply “at the time of each periodic review of the plan (ORS 197.712(3)).” The Eugene Commercial Lands Study (1992) is acknowledged for compliance with the requirements of Goal 9 and the corresponding Administrative Rule.

The adoption of the amendments will not impact the supply of industrial or commercial lands and will not change or conflict with the economic policies of Metro Plan. The amendments do not change the TransPlan and Metro Plan policies directed toward enhancing the economic opportunity available within the Eugene-Springfield area by assuring adequate public facilities and infrastructure to provide a transportation system that is efficient, safe, interconnected and economically viable and fiscally stable. The amendments seek to provide a multi-modal transportation system to meet the needs of the...
community and accommodate economic growth, within projected revenues, into the future. The proposed amendments are consistent with Goal 9.

**Goal 10 - Housing. To provide for the housing needs of the citizens of the state.**

The Eugene-Springfield Metropolitan Area Residential Lanes and Housing Study (1999) is acknowledged for compliance with Goal 10. The adoption of the amendments will not impact the supply of residential lands and will not result in any change or conflict with the housing policies of the Metro Plan. The amendments seek to provide a multi-modal transportation system to meet the needs of the community into the future, including accommodating its housing needs. The proposed amendments are consistent with Goal 10.

**Goal 11- Public Facilities and Services. To plan and develop a timely, orderly and efficient arrangement of public facilities and services to serve as a framework for urban and rural development.**

The Eugene-Springfield Metropolitan Area is currently in compliance with Goal 11 through its acknowledged Public Facilities and Services Plan (PFSP), Comprehensive Plan, and adopted Transportation System Plan, TransPlan. The amendments will not result in any change or conflict with the Comprehensive Plan, PFSP, or TransPlan. The proposed amendments will update the transportation element of the Metro Plan by replacing TransPlan as the locally adopted TSP. As a result, the amendments are in compliance with Goal 11.

**Goal 12- Transportation. To provide and encourage a safe, convenient and economic transportation system.**

Goal 12 is implemented through the Transportation Planning Rule (TPR), as defined in Oregon Administrative Rule OAR 660-012-0000, et seq. The proposed amendments are consistent with all applicable provisions of OAR 660-012-0010. Further, the amendments are consistent with, and a further step toward fulfillment of the Regional Transportation Work Plan approved pursuant to OAR 660-012-0016(2)(b) by the Land Conservation and Development Commission on October 16, 2008.

The amendments adopt the 2035 TSP, which was completed following the rules outlined in the Transportation Planning Rule. The TPR states that when amendments to a functional plan would significantly affect an existing or planned transportation facility the local government shall put in place measures to assure that the allowed land uses are consistent with the identified function, capacity and performance standards (level of service, volume to capacity ratio, etc.) of the facility. The 2035 TSP provides an updated, balanced transportation system with amended functions and capacity of the roadways system that will accommodate growth and land uses envisioned by the acknowledged Metro Plan.

For the reasons set forth below, the proposed amendments are in compliance with Goal 12. The table below (Findings Table A) provides specific findings discussing compliance with individual sections of the TPR.
### TPR Requirements vs. Compliance

**OAR 660-012-0015 Preparation and Coordination of Transportation System Plans**

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<th>TPR Requirements</th>
<th>Compliance</th>
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<td>3) Cities and counties shall prepare, adopt and amend local TSPs for lands within their planning jurisdiction in compliance with this division:</td>
<td>Chapter 3 and Appendix A (Existing Conditions) document the existing conditions inventory and analysis. These outline all of the identified needs associated with today’s conditions for each mode as well as those intersections and streets not meeting applicable operating standards.</td>
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<td>(a) Local TSPs shall establish a system of transportation facilities and services adequate to meet identified local transportation needs and shall be consistent with regional TSPs and adopted elements of the state TSP;</td>
<td>Chapter 3 and Appendix B (No Build) document the No Build analysis. These outline all of the identified year 2035 needs assuming no additional infrastructure beyond that currently funded is added. Each mode’s needs as well as intersection and streets not meeting applicable standards are noted.</td>
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<td>Appendix C (20 year Needs Analysis) and Chapters 4 and 5 document the Build analysis. These outline the identified facilities and services needed to meet the identified transportation needs by mode.</td>
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<td>The 2035 TSP was prepared in collaboration with ODOT to ensure consistency with the Oregon Highway Plan, with Lane County to ensure consistency with the County TSP, and with LCOG to ensure consistency with TransPlan and the Central Lane RTP. The 2035 TSP has the same horizon year as the federally required Central Lane RTP. Even though the 2035 TSP and TransPlan have different horizon years (2035 for the local TSP and 2027 for the regional TSP), there is no conflict between the population and employment numbers. Table B, below, details the consistency between the 2035 TSP and TransPlan. Additionally, because the transportation policies in the Metro Plan are taken verbatim from TransPlan, the findings of consistency between the Transportation Element of the Metro Plan and the 2035 TSP further demonstrate consistency between the 2035 TSP and TransPlan.</td>
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<td>(b) Where the regional TSP or elements of the</td>
<td>Not applicable. Applicable regional and state plans</td>
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state TSP have not been adopted, the city or county shall coordinate the preparation of the local TSP with the regional transportation planning body and ODOT to assure that regional and state transportation needs are accommodated.

(4) Cities and counties shall adopt regional and local TSPs required by this division as part of their comprehensive plans. Transportation financing programs required by OAR 660-012-0040 may be adopted as a supporting document to the comprehensive plan.

The 2035 TSP is being adopted as part of the Metro Plan. The Metro Plan is being amended to add the following Policy F.39 to the Transportation Element: “The Eugene 2035 Transportation System Plan, not including the transportation financing program, is the City of Eugene's local transportation system plan and is included as Appendix E to the Metro Plan.”

(5) The preparations of TSPs shall be coordinated with affected state and federal agencies, local governments, special districts and private providers of transportation services.

The Project Management Team (PMT), Technical Advisory Committee (TAC), and Transportation Community Resource Group (TCRG), as described in Chapter 1 of the TSP, included representatives of Lane County, Lane MPO, ODOT, ODOT Rail, DLCD, City of Springfield, Lane Transit District, Northwest Natural Gas, Union Pacific Railroad, and Eugene Airport and were part of the TSP development for all required coordination. The Lane ACT, Eugene Area Chamber of Commerce, University of Oregon, private freight interests, Eugene-Springfield Fire/EMS, Eugene Bicycle and Pedestrian Advisory Committee, and the Bethel and 4J public school districts were consulted on multiple occasions during TSP preparation.

(6) Mass transit, transportation, airport and port districts shall participate in the development of TSPs for those transportation facilities and services they provide. These districts shall prepare and adopt plans for transportation facilities and services they provide. Such plans shall be consistent with and adequate to carry out relevant portions of applicable regional and local TSPs. Cooperative agreements executed under ORS 197.185(2) shall include the requirement that mass transit, transportation, airport and port districts adopt a plan consistent with the requirements of this section.

Eugene does not have a port. The Airport Master Plan was previously adopted by Eugene and Lane County as part of the Metro Plan; it is adopted and incorporated by reference in the 2035 TSP. Management staff from the Airport was involved as a TSP Technical Advisory Team member. Lane Transit District, Lane County transit district, was a member of the TSP Technical Advisory Team and a regular participant in the Transportation Community Resource Group (TCRG) public advisory group. City transportation planners, including the TSP project manager, participated regularly in the update of LTD’s Long Range Transit Plan. The concepts and definitions of Frequent transit networks (FTN) were coordinated so that the policy direction in the LRTP, TSP, and Envision Eugene (“Key Corridors”) was consistent and complementary. The

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<table>
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<th>Exhibit A to an Ordinance Concerning Long Range Transportation Planning</th>
<th>corridor planning needs of the TSP and LRTP are being simultaneously implemented by the co-City/LTD managed MovingAhead project. LTD has participated and been influential in the creation of the TSP’s transit policies and potential actions.</th>
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<tr>
<td><strong>OAR 660-012-0016 Coordination with Federally-Required Regional Transportation Plans in Metropolitan Areas</strong></td>
<td>Eugene, as a member of the Central Lane MPO, has been a part of the MPO’s regional transportation plan (RTP) update process. The 2035 TSP has been prepared and coordinated with TransPlan and the Central Lane RTP. The 2035 TSP replaces TransPlan as the city’s local TSP; TransPlan will continue to serve as the area’s regional TSP until the new RTSP is developed and adopted. The Central Lane MPO has a work plan approved by LCDC for updating its RTSP. The local TSPs of the individual Central Lane MPO agencies are intended to form the basis of the updated RTSP. The City’s adoption of the 2035 TSP is the last local TSP adopted for the Central Lane MPO area.</td>
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<td>(1) In metropolitan areas, local governments shall prepare, adopt, amend and update transportation system plans required by this division in coordination with regional transportation plans (RTPs) prepared by MPOs required by federal law. Insofar as possible, regional transportation system plans for metropolitan areas shall be accomplished through a single coordinated process that complies with the applicable requirements of federal law and this division. Nothing in this rule is intended to make adoption or amendment of a regional transportation plan by a metropolitan planning organization a land use decision under Oregon law.</td>
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<td><strong>OAR 660-012-0020 Elements of TSPs</strong></td>
<td>Chapter 3 and Appendix A (Existing Conditions) document the Existing Conditions Inventory and Analysis. These outline all of the identified needs associated with today’s conditions for each mode as well as those intersections and streets not meeting applicable operating standards. Chapter 3 and Appendix B (No Build Analysis) document the No Build analysis. These outline all of the identified year 2035 needs assuming no additional infrastructure beyond that currently funded is added. Each mode’s needs as well as intersection and streets not meeting applicable standards are noted. Appendix C (20-year Needs Analysis) and Chapters 4 and 5 document the Build analysis. These outline the identified facilities and services needed to meet the identified transportation needs by mode.</td>
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<td>(1) A TSP shall establish a coordinated network of transportation facilities adequate to serve state, regional and local transportation needs.</td>
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<td>(2) The TSP shall include the following elements:</td>
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<td>(a) Determination of transportation needs as provided in OAR 660-012-0030</td>
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(b) A road plan for a system of arterials and collectors and standards for the layout of local streets and other important non-collector street connections. Functional classifications of roads in regional and local TSP's shall be consistent with functional classifications of roads in state and regional TSP's and shall provide for continuity between adjacent jurisdictions. The standards for the layout of local streets shall provide for safe and convenient bike and pedestrian circulation necessary to carry out OAR 660-012-0045(3)(b). New connections to arterials and state highways shall be consistent with designated access management categories. The intent of this requirement is to provide guidance on the spacing of future extensions and connections along existing and future streets which are needed to provide reasonably direct routes for bicycle and pedestrian travel.

The standards for the layout of local streets shall address:

(A) Extensions of existing streets;

(B) Connections to existing or planned streets, including arterials and collectors; and

(C) Connections to neighborhood destinations.

Chapter 4 of the 2035 TSP sets forth the City’s general functional classifications for streets.

The City’s adopted Design Standards and Guidelines for Eugene Streets, Sidewalks, Bikeways and Accessways (1999) set forth how existing streets can be modified and new streets can be constructed to accommodate the needs of people with disabilities, riding bicycles, riding transit, walking, driving automobiles and moving freight.

In the past, most street design standards were primarily oriented toward moving vehicular traffic, providing rudimentary bike lanes and sidewalks for pedestrians. The 1999 Design Standards and Guidelines for Eugene Street, Sidewalks, Bikeways and Accessways, set forth in Appendix H (Volume 2), serves as the City’s current mandatory design standards and advisory guidelines for arterial, collector, and local streets, and provide for safe and convenient bike and pedestrian circulation. These Design Standards and Guidelines will need to be updated to incorporate the 2035 TSP newer guidance on best practices for bicycle and pedestrian facilities. The policies and action items in 2035 TSP provide guidance for future updates to street standards.

As part of the needs analysis, Eugene’s Street Classification Map was reviewed in light of the classifications shown in the Regional Transportation Plan (RTP), the Oregon Highway Plan (OHP), and the criteria set forth in the Eugene Arterial and Collector Street Plan (ACSP). This review identified a number of streets that needed a change in classification to ensure consistency between the various plans governing and providing guidance to the operation and construction of streets and roads within the City’s UGB. All streets within the UGB need to be classified under the City’s criteria. Attachment B to the 2035 TSP is the 2016 Street Classification Map that updates the street classification map adopted by the City Council in 1999.

In addition to the Design Standards and Guidelines for Eugene Streets, Sidewalks, Bikeways & Accessways and the adopted Street Classification Map, the City has previously adopted the following documents that further satisfy this requirement:

- Street Right-of-Way Map;
• Public Improvement Design Standards Manual;

Additionally, the City’s ACSP, adopted as findings in support of the Design Standards and Guidelines for Eugene Streets, Sidewalks, Bikeways & Accessways, illustrate the extensions of existing streets, connections to existing and planned streets, including arterials and collectors, and connections to neighborhood destinations. Consistent with this previously adopted plan, connections to arterials and state highways remain consistent with designated access management categories.

Eugene Code Chapter 9 includes street connectivity requirements to ensure that all of the following are met:
(a) Streets are designed to efficiently and safely accommodate emergency fire and medical service vehicles.
(b) The layout of a street system does not create excessive travel lengths.
(c) The function of a local street is readily apparent to the user through its appearance and design in order to reduce non-local traffic on local residential streets.
(d) Streets are interconnected to reduce travel distance, promote the use of alternative modes, provide for efficient provision of utility and emergency services, and provide for more even dispersal of traffic.
(e) New streets are designed to meet the needs of pedestrians and cyclists and encourage walking and bicycling as transportation modes.
(f) The street circulation pattern provides connections to and from activity centers such as schools, commercial areas, parks, employment centers, and other major attractors.
(g) Street design is responsive to topography and other natural features and avoids or minimizes impacts to water-related resources and wildlife corridors.
(h) Local circulation systems and land development patterns do not detract from the efficiency of adjacent collector streets or arterial streets which are designed to accommodate heavy traffic.
(i) Streets identified as future transit routes should be designed to safely and efficiently accommodate transit
vehicles, thus encouraging the use of public transit as a transportation mode.

(j) Where appropriate, the street system and its infrastructure should be utilized as an opportunity to convey and treat storm water runoff.

Policies contained in Chapter 2 of the 2035 TSP address extensions of existing streets; connections to existing or planned streets, including arterials and collectors, as well as connections to neighborhood destinations. The pedestrian and bicycle projects noted in Chapters 4 and 5 also provide connections to neighborhood destinations.

Chapter 5 of the TSP includes the planned roadway facilities and associated costs. The identified roadway facility projects and roadway plan are consistent with state and regional transportation plans.

(c) A public transportation plan which:

(A) Describes public transportation services for the transportation disadvantaged and identifies service inadequacies;

(B) Describes intercity bus and passenger rail service and identifies the location of terminals;

(C) For areas within an urban growth boundary which have public transit service, identifies existing and planned transit trunk routes, exclusive transit ways, terminals and major transfer stations, major transit stops, and park-and-ride stations. Designation of stop or station locations may allow for minor adjustments in the location of stops to provide for efficient transit or traffic operation or to provide convenient pedestrian access to adjacent or nearby uses.

Chapter 2 of the 2035 TSP includes transit-specific policies and potential action items for transit policies. Appendix J of the 2035 TSP sets forth the Lane Transit District Long Range Transit Plan from which the TSP’s transit-related needs, policies and projects were in large part identified. Additionally, Appendix G of the 2035 TSP sets forth On the Move: Regional Transportation Option Plan.

Chapter 3 of the 2035 TSP and Appendix A (Existing Conditions) outline the existing public transportation services and identifies service deficiencies. They also describe existing transit routes, transit ways, terminals and major transfer stations, stops and park-and-ride stations. In addition, they describe intercity bus and passenger rail service and the location of stations and transfer stations.

Chapter 4 presents the transit modal element. Based on the needs analysis, the 2035 TSP focuses on collaboration with LTD to provide service enhancements, capital improvements, and policies that support:

- Changes to streets and intersections to facilitate bus movement;
- Frequent and reliable transit service, including
<table>
<thead>
<tr>
<th>(d) A bicycle and pedestrian plan for a network of bicycle and pedestrian routes throughout the planning area. The network and list of facility improvements shall be consistent with the requirements of ORS 366.514.</th>
</tr>
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<tbody>
<tr>
<td>On March 12, 2012, the Eugene City Council accepted the 2012 Eugene Pedestrian and Bicycle Master Plan (PBMP) and directed the City Manager to integrate the PBMP into the 2035 TSP. The 2012 PBMP is set forth in Appendix F (Volume 2 of the 2035 TSP). Consistent with the TPR’s requirement that transportation system plans include a bicycle and pedestrian plan for a network of bicycle and pedestrian routes and that transportation system plans be designed to increase transportation choices and reduce reliance on the automobile, the PBMP’s goals, key policies, and projects are woven throughout the 2035 TSP and function as an integral part to making walking and cycling highly convenient. As such, in addition to the 2035 TSP serving as Eugene’s location transportation system plan, the 2035 TSP also serves as Eugene’s bicycle and pedestrian master plan.</td>
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</table>

- Bus rapid transit (e.g., “EmX”-style of transit service) along Key Corridors;
- Amenities that also serve pedestrians and people on bikes, and intermodal connections to transit;
- Car share and bike share programs that can extend the first and last mile of transit trips; and
- Refinements to transit routes and schedules.

Additionally, the 2035 TSP supports Lane Transit District’s Frequent Transit Network (FTN), as defined in the Lane Transit District Long Range Transit Plan, as a regional initiative to better connect areas of more active development to transit.

Chapter 5 of the 2035 TSP sets forth planned transit facilities and major improvements, including associated costs for all corridor projects.
| **(e)** An air, rail, water and pipeline transportation plan which identifies where public use airports, mainline and branchline railroads and railroad facilities, port facilities, and major regional pipelines and terminals are located or planned within the planning area. For airports, the planning area shall include all areas within airport imaginary surfaces and other areas covered by state or federal regulations; | the identified year 2035 needs assuming no additional infrastructure beyond that currently funded is added. These outline all of the identified needs associated for pedestrians and bicyclists.

Chapter 4 of the **2035 TSP** includes a plan for the bicycle and pedestrian networks.

Chapter 5 of the **2035 TSP** includes the planned pedestrian and bicycle facilities and major improvements and associated costs.

Chapter 2 of the **2035 TSP** includes rail, freight, pipeline and air transportation policies and potential action items for those policies. Additionally, the **2035 TSP** explicitly recognizes the Eugene Airport Master Plan (adopted by Eugene and Lane County as part of the Metro Plan) as the guiding policy document for airport property development, services, and support infrastructure. The Eugene Airport Master Plan is set forth in Appendix L.

Chapter 3 and Appendix A (Existing Conditions) document the Existing Conditions Inventory and Analysis. These outline the identified needs associated with today’s conditions for air, rail, water and pipelines.

Chapter 3 and Appendix B (No Build analysis) document the No Build analysis. These outline all of the identified year 2035 needs assuming no additional infrastructure beyond that currently funded is added.

Chapter 4 of the TSP includes a plan for the air, rail, water, and pipeline networks.

| **(f)** For areas within an urban area containing a population greater than 25,000 persons a plan for transportation system management and demand management; | In 2005, the City adopted *Strategies for Transportation System Management and Operations*. The adopted TDM standards are set forth in Appendix K (Volume 2 of the **2035 TSP**). These standards provide a mechanism to vary the number of required off-street parking spaces by providing a strategy for reducing vehicle use and parking demand and using benchmarks to measure program effectiveness. The **2035 TSP** expands the use of TDM and TSMO practices beyond parking to help address traffic congestion, fossil fuel

<p>| | efficiency, air quality, and energy use. Additionally, the City adopted a set of parking standards in 2005 (see <strong>Volume 2 of the 2035 TSP</strong>). The adopted standards set forth a mechanism to vary the number of required off-street parking spaces by providing a strategy for reducing vehicle use and parking demand and using benchmarks to measure program effectiveness. The <strong>2035 TSP</strong> expands the use of TDM and TSMO practices beyond parking to help address traffic congestion, fossil fuel efficiency, air quality, and energy use. |</p>
<table>
<thead>
<tr>
<th>(g) Parking plan as provided in OAR 660-012-0045(5)(c).</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chapter 2 of the 2035 TSP includes parking policies and potential action items for the parking policies.</td>
</tr>
<tr>
<td>Chapter 4 of the TSP outlines a parking plan.</td>
</tr>
<tr>
<td>The City of Eugene implemented a parking plan after the adoption of TransPlan. That implementation measure including updating the Eugene Code towards accomplish the following:</td>
</tr>
<tr>
<td>(A) Achieve per capita a 10% reduction in the number of parking spaces over the planning period through a combination of restrictions on development of new parking spaces, allowing shared spaces, and allowing some existing parking spaces to be redeveloped to other uses;</td>
</tr>
<tr>
<td>(B) Aids in achieving the measurable standards set in TransPlan (per OAR 660-012-0035(4)), such as reducing the percentage of non-auto trips, increasing</td>
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</table>

reduction goals, safety, and the financial burden of travel on individuals. Further, the 2035 TSP includes a policy to “[p]romote transportation demand management programs along the Key Corridors, in downtown, and near the University of Oregon to coordinate the needs and travel options of multiple businesses and residences for purposes of reducing automobile and freight demand at times of peak congestion. These programs could be staffed by either a public agency, a business association, or by training individuals within the affected businesses and housing to perform this work.”

Chapter 4 of the TSP includes a Transportation System Management and Operations (TSMO) plan and a Transportation Demand Management (TDM) plan. Eugene, in collaboration with the Central Lane MPO, LTD/Point2point, and the City of Springfield identified the key programs and services through the Regional Transportation Options Plan (RTOP). The 2035 TSP recognizes the RTOP as the regional guidance for programs that reduce reliance on single-occupancy vehicles. Further details of TSMO and TDM strategies that support the 2035 TSP are provided in the Regional Transportation Options Plan, which is set forth as Appendix G (Volume 2).
transit ridership on congested corridors, and encouraging development in ‘nodes’ by reducing parking requirements for transit-oriented development within nodal development areas;

(C) Providing land use and subdivision regulations setting minimum and maximum parking requirements in appropriate locations, and eliminating off-street parking requirements for automobiles in the downtown core; and

(D) Is consistent with demand management programs, transit-oriented development requirements and planned transit service.

This 2035 TSP contains policies encouraging frequent review and updates to existing parking standards (updated per TransPlan, 2002) to reflect improved alternatives to driving single-occupant vehicles as these alternatives become available, such as improved transit service, bike facilities, car- and bike-share programs, improved neighborhood walkability, and transportation Demand Management programs.

(h) Policies and land use regulations for implementing the TSP as provided in OAR 660-012-0045.

The 2035 TSP adoption package include amendments to Eugene’s land use code that are needed for the 2035 TSP to be recognized as the City’s local transportation system plan and to adopt new levels of service for the City’s roadways. Additionally, the policies and potential actions for implementing the TSP that are set forth in Chapter 2 of the 2035 TSP identify amendments that could be made to the land use code to further the policies set forth in 2035 TSP.

(i) Transportation financing program as provided in OAR 660-012-0040.

Chapter 6 of the TSP includes the transportation financing plan, including existing and potential new funding sources and a summary of improvement costs by modal category. Chapter 5 of the TSP provides a detailed listing of cost for each individual improvement project, by mode.

(3) Each element identified in subsections (2)(b) – (d) of this rule shall contain:

(a) An inventory and general assessment of existing and committed transportation

Chapter 3 and Appendix A (Existing Conditions) document the Existing Conditions Inventory and Analysis and describe the existing and committed facilities and services by function, type and condition
facilities and services by function, type, capacity and condition.

(A) The transportation capacity analysis shall include information on:
(i) The capacities of existing and committed facilities;
(ii) The degree to which those capacities have been reached or surpassed on existing facilities; and
(iii) The assumptions upon which these capacities are based.

(B) For state and regional facilities, the transportation capacity analysis shall be consistent with standards of facility performance considered acceptable by the affected state or regional transportation agency;

(C) The transportation facility condition analysis shall describe the general physical and operational condition of each transportation facility (e.g., very good, good, fair, poor, very poor).

(b) A system of planned transportation facilities, services and major improvements. The system shall include a description of the type or functional classification of planned facilities and services and their planned capacities and performance standards.

Chapter 3 and Appendix B (No Build analysis) document the No Build analysis. These outline all of the identified year 2035 needs assuming no additional infrastructure beyond that currently funded is added. These present a transportation capacity analysis of the existing and committed roadway system, including streets and intersections consistent with existing city, county, and state standards; in some instances state adoption of alternative mobility standards will be requested through an OHP amendment. This operational analysis describes the degree to which those capacities have been reached or surpassed on existing facilities, and the assumptions upon which these capacities are based.

Chapter 4 summarizes the proposed system of existing and planned transportation facilities, services and major improvements, by functional classification, planned capacities and performance standards. The City maintains a separate inventory of street physical conditions. Concurrent with the adoption of the 2035 TSP are amendments to the Street Classification Map. Chapter 5 of the 2035 TSP sets forth a system of planned transportation facilities, services and major improvements, including the type or functional classification of the planned facilities and services.

**OAR 660-012-0025 Complying with Goals in Preparing TSPs**

1. Adoption of a TSP shall constitute a land use decision regarding the need for transportation facilities, services and major improvements and their function, mode and general location.
   - This will happen automatically upon adoption. This requirement is also included in local regulations.

2. Findings of compliance with applicable statewide planning goals and acknowledged comprehensive plan policies and land use regulations shall be developed in conjunction with the adoption of the TSP.
   - These findings demonstrate compliance with the applicable statewide planning goals, acknowledged comprehensive plan and land use regulations.

**OAR 660-012-0025(3)**

The City may defer decisions regarding...
function, general location and mode of a refinement plan if findings are adopted that:

(a) Identify the transportation need for which decisions regarding function, general location or mode are being deferred.

(b) Demonstrate why information required to make final determination cannot be made available within time for TSP preparation.

(c) Explain how deferral does not invalidate the assumptions upon which the TSP is based or preclude implementation of the remainder of the TSP.

(d) Describe the nature of the findings which will be needed to resolve issues deferred to a refinement plan; and,

(e) Set a deadline for adoption of a refinement plan prior to initiation of the periodic review following adoption of the TSP.

deferral of a decision regarding function and general location of improvements: the Randy Papé Beltline Facility Plan, future studies for improved access across the Willamette River, and multimodal studies of the Key Corridors.

The Randy Papé Beltline Facility Plan identifies probable improvements that warrant further analysis through the NEPA process. The 2035 TSP adopts the facility plan, as noted in Chapter 5, and incorporates reasonable outcomes for purposes of project costs and financing projections. Construction of the largest component of this project, a new local arterial bridge, cannot commence until the NEPA analysis is completed and the project is adopted by the City Council. The NEPA process cannot be completed within the timeframe of the TSP, in part because the Facility Plan must be adopted in the TSP before the NEPA analysis may commence.

Improved crossings of the Willamette River were identified as a potentially desirable solution to several needs (e.g., seismic upgrades, improved connectivity, and congestion relief). Completion of such a study could not be completed within the timeframe of the 2035 TSP because of the large study area, environmental sensitivity of the riverine environment, need for robust public engagement, and need to gather funding for such a large undertaking. The 2035 TSP assumptions about traffic function did not rely on any additional river crossings; hence the deferral of a decision about additional river crossings does not invalidate the assumptions upon which the 2035 TPS is based or preclude implementation of the remainder of the 2035 TPS.

The 2035 TSP identifies a desire to complete detailed land use and multimodal transportation studies for several “Key Corridors” identified in the Envision Eugene Vision Statement (2012). Such a planning process was begun as a joint project by the City of Eugene and Lane Transit District, dubbed “MovingAhead.” The areas covered by these studies are substantial: the development corridors along Highway 99, River Road, Coburg Road, mid-Willamette/30th Avenue, and others. Completion of these studies could not be completed within the timeframe of the TSP. The TSP used estimations for
corridor performances and costs based on realistic, previously completed corridors with enhances transit service; therefore, the deferral of a decision on specific corridor improvements does not invalidate the assumptions upon which the TSP is based or preclude implementation of the remainder of the TSP.

No new findings will be needed to resolve issues deferred to these studies. There is no need to set a deadline for adoption of a plan amendment based on the outcome of these studies because the 2035 TSP is self-sufficient without the results of these studies.

<table>
<thead>
<tr>
<th>OAR 660-012-0030 Determination of Transportation Needs</th>
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<tbody>
<tr>
<td>(1) The TSP shall identify transportation needs relevant to the planning area and the scale of the transportation network being planned including:</td>
</tr>
<tr>
<td>(a) State, regional and local transportation needs</td>
</tr>
<tr>
<td>(b) Needs of the transportation disadvantaged</td>
</tr>
<tr>
<td>(c) Needs for movement of goods and services to support industrial and commercial development planned for, pursuant to Goal 9.</td>
</tr>
<tr>
<td>Chapter 3 and Appendix A (Existing Conditions) document the Existing Conditions Inventory and Analysis. These outline all of the identified needs associated with today's conditions for each mode as well as those intersections and streets not meeting applicable operating standards.</td>
</tr>
<tr>
<td>Chapter 3 and Appendix B (No Build analysis) document the No Build analysis. These outline all of the identified year 2035 needs assuming no additional infrastructure beyond that currently funded is added. Each mode's needs as well as intersection and streets not meeting applicable standards are noted.</td>
</tr>
<tr>
<td>Chapter 3 and Appendices A and B include a determination of the transportation needs, by mode, related to state, regional and local transportation needs, needs of transportation disadvantaged, and needs for goods movement to support industrial and commercial development.</td>
</tr>
<tr>
<td>Representatives of ODOT, DLCD, the Eugene Area Chamber of Commerce, the transportation disadvantaged, Eugene Human Rights Commission, homebuilders, rail, air travel, and freight participated in the creation of the 2035 TSP.</td>
</tr>
<tr>
<td>(2) Local governments preparing local TSPs shall rely on the analyses of state and regional transportation needs in adopted elements of the state TSP and adopted regional TSPs.</td>
</tr>
<tr>
<td>The TSP has been coordinated with the analyses included in applicable state plans, the Metro Plan, TransPlan, and the RTP.</td>
</tr>
</tbody>
</table>
(3) Within UGBs, the determination of local and regional transportation needs shall be based upon:

(a) Population and employment forecasts and distributions that are consistent with acknowledged com plan. Forecasts and distributions shall be for 20 years and, if desired, for longer periods; and,

Chapter 3 and Appendix B (No Build Analysis) include population and employment forecasts consistent with the *Metro Plan* and coordinated with the Lane MPO for year 2035.

The *2035 TSP* addresses the projects, programs, and policies needed to support growth in population and jobs within the Eugene UGB between now and the year 2035. The *2035 TSP* defines the transportation facilities needs within Eugene’s adopted UGB, as established by the *Metro Plan*. The needs assessment and resulting projects (set forth in Chapter 4 of the *2035 TSP*) establish a transportation system adequate to meet the identified local transportation needs based upon the land use designations established by the *Metro Plan*. Because the *2035 TSP* is based on the *Metro Plan* land use designations, any zone allowed within the land use designation is consistent with both the *Metro Plan* and this *2035 TSP*.

Regarding the population and employment forecasts, the determination of the City’s needs assumes that the City will continue to see growth in employment and population between now and the year 2035 in a manner consistent with the existing Comprehensive Plan land use designations, within the existing Urban Growth Boundary (UGB) and consistent with the growth forecast adopted into the *Metro Plan*. Regarding the population and employment distributions, Staff from the cities of Eugene and Springfield, Lane County and Lane Council of Governments (LCOG) worked collaboratively to identify where the estimated year 2035 population and employment growth might occur within the region as well as within individual areas of each city. This interagency collaboration ensures that the needs analyses for Eugene, Springfield, and Coburg start with the same fundamental assumptions and that the population and employment forecasts are “coordinated” for compliance with Oregon transportation and land use planning requirements. This growth was allocated to developable areas within the current UGB consistent with the land use designations shown in the adopted *Metro Plan*.
(b) Measures adopted pursuant to OAR 660-012-0045 to encourage reduced reliance on the automobile.

OAR 660-012-0045(1) requires local government to amend its land use regulations to implement the TSP. Eugene’s land use regulations were amended to comply with this rule after TransPlan was adopted in 2002.

The 2035 TSP retains those measures and encourages incremental changes to strengthen their effectiveness over time as new travel options become available. Modal Targets are identified in the goals contained in Chapter 2; they triple the percentage of trips made by non-auto modes. Many of the goals, policies, and implementing actions contained in Chapter 2 will help reduce reliance on the automobile.

The modal plans, TDM and TSMO plans contained in Chapter 4 and the pedestrian, bicycle, and transit improvement projects contained in Chapter 5 will help reduce reliance on the automobile.

(4) In MPO areas, calculation of local and regional transportation needs also shall be based on accomplishment of the requirement in OAR 660-012-0035(4) to reduce reliance on the automobile.

As discussed in more detail under 0035(4), the 2035 TSP supports and advances the alternative performance standards approved by LCDC in 2001 and adopted as part of TransPlan. In furthering the goals of the 2001 standards, the 2035 TSP builds upon the lessons learned since 2001, and recognizes that there are new, innovative ways to decrease vehicle miles of travel. Embedded in the needs analysis for the 2035 TSP is the furtherance of the City’s adopted measures that will reduce reliance on the automobile.

The 2035 TSP reflects Eugene policy makers’ and community members’ priority to maintain existing facilities and provide multiple transportation options for local and regional travel. These priorities are based on the premise that the City can reduce congestion, save money, and provide health benefits for the entire community by providing alternatives to single occupancy vehicle travel and by making existing streets safer and more efficient without costly increases to automobile-oriented infrastructure.

The 2035 TSP supports the land use strategies defined in the 2012 Envision Eugene, A Community Vision for 2032 and prioritizes recommendations that mitigate the strain on roadways by supporting transit service...
and making walking and bicycling trips more practical for working, shopping, and other daily activities; managing congestion; and improving safety.

The 2035 TSP goals, policies, projects, and potential implementing actions are based on analysis by, and input received from, the community, City of Eugene staff, partner agency staff, and City policy-makers. Their review included analysis of, among other things, a multi-step evaluation of the “triple bottom line” (economy, social equity, and natural environment) that included considerations of how possible system improvements will meet the transportation needs for all modes, address the needs of the transportation disadvantaged, and address the need for movement of goods and services to support industrial and commercial development.

### OAR 660-012-0035 Evaluation and Selection of Transportation System Alternatives

(1) The TSP shall be based on evaluation of potential impacts of system alternatives that can reasonably be expected to meet the identified transportation needs in a safe manner and at a reasonable cost with available technology. The following shall be evaluated as components of system alternatives.

<table>
<thead>
<tr>
<th align="left">(a) Improvements to existing facilities or services;</th>
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<tbody>
<tr>
<td align="left">The multimodal system improvements were assessed against the goals and policies in Chapter 2 and the evaluation criteria in Chapter 3 to ensure that needs are met with a safe and reasonable manner with available technology.</td>
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| Improvements to existing facilities and services are the fundamental basis and highest priority of the TSP goals, policies and project lists. As iterated in the policies in Chapter 2, the City’s priority is to improve system efficiency, safety and management and re-purpose existing rights-of-way to include high-quality facilities for non-auto users before widening streets to expand capacity for motorized vehicles. |

Specifically, the 2035 TSP’s Cost Effectiveness and Finance Policy 2, states: “Maintain transportation performance and improve safety by improving system efficiency and management before adding capacity for automobiles to the transportation system by using the following priorities for developing the Eugene Capital Improvement Program (CIP) and Eugene projects in the Metropolitan Transportation Improvement Program (MTIP):

a. Protect the existing system. The highest
priority is to preserve or improve the functionality of the existing transportation system by means such as access management, transportation demand management, improved traffic operations, technologies, accommodating “active transportation” options not previously present, and keeping roads well maintained to avoid reconstruction.

b. Improve the efficiency and safety of existing facilities. The second priority is to make minor improvements to existing streets, such as adding turning lanes at intersections, providing and enhancing pedestrian, bicycle and transit facilities, and extending or connecting streets pursuant to existing plans.

c. Add capacity to the existing system. The third priority is to make major improvements to existing transportation facilities such as adding general purpose lanes and making alignment corrections to accommodate legal-sized vehicles.

d. Add new facilities to the system. The lowest priority is to add new transportation facilities for motorized vehicles, such as new roadways. New streets that are needed and planned for connectivity are a higher priority, as noted in (b), above.”

In accordance with Appendices A (Existing Conditions), B (No Build), and C (20-year Needs Analysis), improvements to the existing facilities and services were examined through the existing conditions study, needs analysis with a “No Build” scenario, and a scenario that explored improvements and additions to the existing system. Technological and TSMO improvements to the efficiency of the existing system are recommended by the TSP.
| (c) Transportation system management measures; | The Transportation System Management and Operations (TSMO) Plan, contained in Chapter 4, focuses on increasing the safety and efficiency of the existing street system, promoting safety for all users, supporting the economy and supporting the City’s Climate Recovery Ordinance. |
| (d) Demand management measures; and | The Transportation Demand Management (TDM) Plan, contained in Chapter 4, in coordination with the Regional Transportation Options Plan (RTOP), focus on providing greater travel choices to enhance mobility and accessibility and maximize transportation investments. Transportation Demand Management is a tool already integrated into the Eugene Land Use Code for reducing demand on a facility, reliance on single-occupant motorized vehicles, and parking supply. Further, the city has set targets to triple the percentage of trips made by trips other than the automobile by 2035. |
| (e) A no-build system alternative required by the NEPA or other laws. | Chapter 3 and Appendix B (No Build) document the No Build system alternative and associated transportation needs in the year 2035. |
| (3) The following standards shall be used to evaluate and select alternatives: | Chapter 3 and Appendix D (Alternatives Evaluation Process) document the alternatives evaluation and selection process. Goals and policies are included in Chapter 2 and guided the process. The evaluation framework developed for the TSP referenced the Sustainable Transportation Analysis and Rating System (STARS) and reflects the city’s commitment to the sustainability triple bottom line. The STARS evaluation |
(a) The transportation system shall support urban and rural development by providing types and levels of transportation facilities and services appropriate to serve the land uses identified in the acknowledged comprehensive plan;

The 2035 TSP modeling and needs analysis is based on the Comprehensive Plan land use designations in the Metro Plan within the existing UGB and consistent with the growth forecast adopted into the Metro Plan.

Modeling for the 2035 TSP used the same land use designation model (or “layer”) used for the Envision Eugene buildable lands inventory. Because the Metro Plan land use designation map was adopted at a relatively large scale (small geographic representation) of 1:1,500, and no file is maintained by the City of known plan-split lots as is the case for zoning districts, the land use designation layer was created by enlarging the Metro Plan’s 11x17 land use designation map and applying a set of rules to resolve split designations on taxlots. A process was used to identify those lots having a substantive portion in two or more differing plan designations versus those that have only a minor portion in an adjoining plan designation. Those lots not identified as candidate split lots were considered designated according to the plan designation found at the geometric center of the lot.

Chapter 3 and Appendices B (No Build) and C (20 year Needs Analysis) document the anticipated land uses and the 2035 TSP projects (types and levels of service) needed to support the land uses depicted on the land use designation layer described above. The TSP supports urban growth as planned for the Eugene UGB area in the acknowledged comprehensive plan (the Metro Plan) and regional travel, and restricts facility extension that might encourage inappropriate growth on rural lands.

Comparable STARS criteria:
- Ensure consistency between transportation investments and all relevant adopted and accepted local plans.
- Support redevelopment priorities by promoting compatible transportation investments along key corridors and in core commercial areas, including downtown.
- Increase access to employment centers via foot, bike, and transit, while improving the
| (b) The transportation system shall be consistent with state and federal standards for protection of air, land and water quality; | Three of the eight STARS evaluation criteria reference air quality, protection of land and water quality. All alternatives considered were evaluated against adopted state and federal standards. Sample STARS criteria that promote consistency with state and federal standards for protection of air, land and water quality:
- Support the reduction in quantities of harmful airborne pollutants associated with transportation. |
| --- | --- |
| (c) The transportation system shall minimize adverse economic, social, environmental and energy consequences; | The alternatives analysis summarized in Chapter 3 and Appendix D (Alternatives Evaluation Process) include an evaluation of adverse economic, social, environmental and energy consequences. Many of the eight evaluation criteria reference these issues. Further, the goals and policies included in Chapter 2 highlight the importance of minimizing these consequences. Example STARS criteria that minimize adverse economic, social, environmental and energy consequences:
- Use future transportation investments to reduce or eliminate disparities between neighborhoods in access, economic benefits, safety, and health.
- Encourage infrastructure and programs that allow residents to reduce expenditures on fuel and vehicle use.
- Focus on transportation programs and projects that help to:
  - reduce total community-wide fossil fuel use by 50% by 2030
  - reduce vehicle miles traveled per capita by 10% by the year 2020
  - reduce community-wide greenhouse gas emissions 10% below 1990 levels by 2020 |
| Triple Bottom Line (abbreviated as TBL) is an accounting framework with three parts: social, environmental, and financial. The 2035 TSP integrated... |
TBL sustainability principles in every step of its development. The criteria that were used to prioritize potential projects and programs in this plan were broadened to include public health and safety, community context and neighborhood character, climate and energy, and cost effectiveness to ensure that the plan adequately addresses the many aspects of the economy-equity-environment triple bottom line.

The 2035 TSP supports equity and social prosperities in several ways. This plan supports the provision of complete transportation networks that serve all travelers of all ages, abilities, and incomes. Everybody should have safe and efficient access to employment, education, services, and recreation. The 2035 TSP promotes the services and projects that will result in sufficient options to meet these needs. This plan also calls for assurances that costs and benefits of transportation improvements are shared equitably over time, both geographically throughout the city and among populations of different economic strata, races, and ethnicities.

The 2035 TSP supports the continued growth and vitality of the local and regional economy. Transportation infrastructure investments on key corridors will support the projected employment base and freight movements as well as improve multimodal access to the airport and train station. The 2035 TSP removes a barrier to planned growth by adjusting Levels of Service for traffic to more realistic levels, levels that reduce reliance on automobile travel and permit levels of development desired by the comprehensive land use plan.

(d) The transportation system shall minimize conflicts and facilitate connections between modes of transportation; and

The alternatives analysis summarized in Chapter 3 and Appendix D (Alternatives Evaluation Process) include an evaluation of the potential for intermodal connections and minimization of conflicts. Further, the goals and policies included in Chapter 2 are focused on creating a complete, connected transportation system that meets the needs and safety of travelers of all ages, abilities, races, ethnicities and incomes.

Sample STARS criteria that minimize conflicts and facilitate connections between modes of transportation:
| • Support redevelopment priorities by promoting compatible transportation investments along key corridors and in core commercial areas, including downtown. |
| • Foster neighborhoods where 90 percent of Eugene residents can meet most daily needs without relying heavily on an automobile. |
| • Improve the comfort and convenience of travel, especially for walking, bicycling, carpooling, and riding transit. |
| • Maintain a network of Emergency Response Streets to facilitate prompt emergency response. |

(e) The transportation system shall avoid principal reliance on any one mode of transportation by increasing transportation choices to reduce principal reliance on the automobile. Select transportation alternatives that meet the requirements in section (4) of the rule.

The alternatives analysis summarized in Chapter 3 and Appendix D (Alternatives Evaluation Process) is fundamentally based on the need to decrease reliance on the automobile (see sample criteria, above). Most of the eight STARS evaluation criteria reference this critical need. Further, the goals and policies included in Chapter 2 highlight the importance of tripling the percentage of trips made by transit, cycling and walking by 2035 and increasing transportation choices for all users.

The 2035 TSP plans for significant investment in active transportation over the next 20 years. Of the 276 projects planned in the 2035 TSP to be built over the next 20 years, 253 of the projects are entirely pedestrian and bicycle projects; those projects include 89 neighborhood greenway projects, 17 shared use paths, 10 protected bike lane projects, and 89 separated path/sidewalk projects. Six of the 276 projects are transit projects, which include improving frequent transit service and multimodal travel along numerous transit corridors.

The 2035 TSP includes a “Complete Streets” policy that will affect how all streets will be planned and maintained in the future. By making streets more inviting to pedestrians and bicyclists, especially for short trips, the City will gain more efficient use of limited available space within the street rights-of-way, provide a healthier environment in neighborhoods, and support the higher density, mixed use Key Corridors championed by the Envision Eugene, A
Community Vision for 2032.

Improvements to the sidewalk, bicycle, and transit networks make many more travel options available, providing choices that best fit one’s travel needs, financial situation, and location. In furtherance of the goal to increase the number of people choosing active transportation as their travel option, as noted above, there are 245 bicycle, pedestrian and transit projects planned for the next 20 years; these projects representing over 51% of the total transportation dollars that the City plans to spend over the next 20 years.

By planning for the active transportation infrastructure that will make active modes of travel more safe and convenient, the 2035 TSP is designed to achieve its goal of greatly increasing the number of trips made by transit, bicycling and walking. With the 245 bicycle, pedestrian and transit projects (as well as the six complete street projects) planned for the next 20 years, the 2035 TSP hopes to (at least) triple the number of trips made by transit, bicycling or walking by 2035.

(4) In MPO area, regional and local TSPs shall be designed to achieve adopted standards for increasing transportation choices and reducing reliance on the automobile. Adopted standards are intended as means of measuring progress of metropolitan areas towards developing and implementing transportation systems and land use plans that increase transportation choices and reduce reliance on the automobile. It is anticipated that metropolitan areas will accomplish reduced reliance by changing land use patterns and transportation systems so that walking, cycling, and use of transit are highly convenient and so that, on balance, people need to and are likely to drive less than they do today.

The 2035 TSP supports and advances the alternative performance standards approved by LCDC in 2001 and adopted as part of TransPlan. The Transportation Demand Management Plan, contained in Chapter 4, in coordination with the Regional Transportation Options Plan, focuses on providing greater travel choices to enhance mobility and accessibility and maximize transportation investments. Further, the City has set targets to triple the percentage of trips made by trips other than the automobile by 2035, as iterated in the goals and policies included in Chapter 2 and the evaluation criteria included in Chapter 3.

In furthering the goals of the 2001 standards, the 2035 TSP builds upon the lessons learned since 2001, and recognizes that there are new, innovative ways to decrease vehicle miles of travel. To that end, the 2035 TSP uses terminology that, at times, slightly differs from the terminology adopted in 2001, but nevertheless advances the achievement of the standards approved by LCDC in 2001. For example, the City no longer uses the term “nodal development” in its land use and transportation planning efforts.
Instead, the City uses terms such as “key corridors” and “20-minute neighborhoods.” Despite a shift in terminology, the underlying concept, goals, and benefits of nodal development remains unchanged; providing land use patterns so that walking, cycling, and use of transit are highly convenient and so that, on balance, people need to and are likely to drive less than they do today. Most importantly, the 2035 TSP is designed to increase transportation choices and reduce reliance on the automobile.

The 2035 TSP supports and advances the alternative performance standards approved by LCDC in 2001 and adopted as part of TransPlan in the following way:

% Non-Auto Trips. The 2035 TSP has goals of tripling trips by walking, biking, and transit and reducing fossil fuel consumption. Of the 264 projects planned in the 2035 TSP to be built over the next 20 years, 239 of the projects are entirely pedestrian and bicycle projects; those projects include 89 neighborhood greenway projects, 18 shared use paths, 12 protected bike lane projects, and 85 separated path/sidewalk projects. Six of the 264 projects are transit project, which include improving frequent transit service and multimodal travel along numerous transit corridors. These 245 bicycle, pedestrian, and transit projects represent 51% of the total transportation dollars that are planned to be spent over the next 20 years. Of the 19 remaining projects, six of the projects are complete street upgrades to existing roadways; all six of these projects have a significant bicycle and pedestrian component. These complete street projects represent an additional 10% of the total transportation dollars. Establishment of a bike share program is currently underway and is one of the 2035 TSP’s four bicycle policies.

The 2035 TSP has a policy to encourage walking as the most attractive mode of transportation for short trips (e.g., within 0.5 miles) within and to activity centers, downtown, key corridors, and major destinations, and as a means of accessing transit. A related policy of the 2035 TSP is to ensure that there are safe, accessible, comfortable, and direct sidewalk connections between residential areas, major destinations, and transit stops and to continually improve walking comfort, safety, and accessibility through design, operations, retrofits, and maintenance.
% Transit Mode Share on Congested Corridors. The 2035 TSP has a goal of tripling trips by walking, biking, and transit, and policies that promote planning and improving multimodal access along the Key Corridors (EE Vision) and (the same) Frequent Transit Networks (LTD Long Range Transit Plan).

The 2035 TSP policies promote improved transit services that are integrated through context specific multimodal planning for all Key Corridors. One of the four transit policies in the 2035 TSP is to collaborate with Lane Transit District to provide a network of high capacity, frequent, and reliable transit services, including consideration of Bus Rapid Transit, to the City’s identified Key Corridors and to Frequent Transit Corridors as defined by Lane Transit District’s Long Range Transit Plan. Additionally, the 2035 TSP includes $171.4 million in transit projects that support the transit policies and the identified transit needs. The six multimodal/transit projects planned for the next 20 years include the improvement of frequent transit service and multimodal travel along Coburg Road, River Road, Highway 99, 30th Avenue and Amazon Parkway, new transfer stations, and enhanced pedestrian crossings. Additionally, an identified potential action item is to review City Code and amend it if needed to enable additional opportunities to provide bikeways and improved pedestrian connections between key destinations, transit stops, and residential areas with new development and redevelopment.

Priority Bikeway Miles. “Priority bikeway” projects are defined in TransPlan as: “Bike projects located along an essential core route on which the overall bicycle system depends; and (one of the following): 1. Fills in a critical gap in the existing bicycle system; or 2. Overcomes a barrier where no other nearby existing or programmed bikeway alternatives exist; or, 3. Significantly improves bicycle users’ safety in a given corridor.” The 2035 TSP sets benchmarks constructing new projects that meet TransPlan’s definition of Priority Bikeway Miles. The 2035 TSP promotes a complete network of various context sensitive bikeways throughout the community (including cycle tracks, bike boulevards, and protected bikeways). As discussed above, of the 264 projects planned in the
2035 TSP to be built over the next 20 years, 245 of the projects are entirely pedestrian and bicycle projects; those projects include 89 neighborhood greenway projects, 22 on-street bike lanes, 18 shared use paths, 12 protected bike lane projects, and 85 separated path/sidewalk projects. These 245 bicycle, pedestrian, and transit projects represent 51% of the total transportation dollars that are planned to be spent over the next 20 years. One of the 2035 TSP's bicycle policies is to “[d]evelop a well-connected and comfortable bikeway network. Ensure that there are safe, comfortable, and direct bikeway connections between residential areas, major destinations, and transit stops and provide secure bicycle parking facilities at these destinations.” The related potential action item is: “Maintain a map and project list for desired improvements to the bicycle network within the life of this plan. Provide priorities among these projects, yet provide flexibility among priorities to respond to unforeseen opportunities and development.”

The list of bicycle projects in support of the policies and the identified needs are shown in Chapter 5. The 2035 TSP is the City’s bicycle and pedestrian plan, providing projects and policies that will create a network of bicycle and pedestrian-friendly routes throughout the planning area. While the map of all potential bicycle system improvements may include some on local streets, only improvements on collector and arterial streets were considered for the 2035 TSP project list and cost estimates.

**Acres of zoned nodal development.** “Nodal development” is defined in TransPlan as “a mixed-used, pedestrian friendly land use pattern that seeks to increase concentrations of population and employment in well-defined areas with good transit service, a mix of diverse and compatible land uses, and public and private improvements designed to be pedestrian and transit oriented.” The 2035 TSP promotes the completion of safe, comfortable, and direct sidewalk and bikeway networks between key destinations, transit stops, and residential areas, which supports nodal development. Specifically, the 2035 TSP does not change the zoning of nodal development areas. Further, the 2035 TSP sets benchmarks for increasing the number of acres that meet TransPlan’s
definition of nodal development, *i.e.*, mixed use centers, Key Transit Corridors, and 20-minute neighborhoods.

**% of dwelling units built in nodes.** This TSP promotes neighborhoods where 90 percent of Eugene residents can meet most daily needs without relying heavily on an automobile. A system-wide policy of the 2035 TSP is fostering neighborhoods where Eugene residents can meet most of their basic daily needs without an automobile by providing streets, sidewalks, bikeways, and access to transit in an inviting environment where all travelers feel safe and secure. The related potential action item is the creation of a strategy to facilitate 90 percent of Eugene residences to be within 20-minute neighborhoods. Further, the 2035 TSP sets benchmarks for increasing the percentage of new dwelling units built in areas that meet TransPlan’s definition of nodal development, *i.e.*, % of new dwelling units built in mixed use centers, 20-Minute Neighborhoods, and along Key Transit Corridors.

**% of New “Total” Employment in Nodes.** The TSP supports employment in nodes by increasing access to employment centers via foot, bike, and transit, and promoting compatible transportation investments along key corridors and in core commercial areas, including downtown. Identified potential action items include aligning the City’s land use and parking regulating to encourage walking, biking, and use of public transit and periodically reviewing parking needs in the downtown, Federal Courthouse, and riverfront districts and balance supply with other objectives, such as economic vitality; support for transit, walking, and biking; reduced consumption of fossil fuels; and human-scaled urban form. Additionally, for more than 10 years the City has had in place Standards for Transportation Demand Management Programs that provide a mechanism to vary the number of required off-street parking spaces by providing a strategy for reducing vehicle use and parking demand and using benchmarks to measure program effectiveness. Further, the 2035 TSP sets aggressive goals for the percentage of new employment located within areas that meet TransPlan’s definition of nodal development, *i.e.*, % of new employment in mixed use centers, 20 Minute Neighborhoods, and along Key Transit Corridors.
Internal VMT. Vehicle Miles Travelled have been on the decline in Eugene. Policies cited above that promote alternatives to driving, mixed use neighborhoods, and reduced consumption of fossil fuels will help reduce VMT. Goal 1 of the 2035 TSP is to “[c]reate an integrated transportation system that is safe and efficient; supports the Metro Plan’s land use diagram and Envision Eugene, A Community Vision for 2032 (2012), the City of Eugene’s target for a 50 percent reduction in fossil fuel consumption, and other City land use and economic development goals; reduces reliance on single-occupancy automobiles; and enhances community livability.”

VMT/Capita. Per capita VMT has been on the decline in Eugene. Policies cited above that promote alternatives to driving, mixed use neighborhoods, education, and reduced consumption of fossil fuels will help reduce per capita VMT.

The 2035 TSP’s design to increase transportation choices and reduce reliance on the automobile will most likely advance any new regional standards that are adopted as part of the RTSP update, however, if needed, the 2035 TSP will be amended to address the new regional standards.

As discussed above, OAR 660-012-0035(5) requires that MPO areas adopt standards for approval by the Land Conservation and Development Commission (LCDC). The 0035(5) standards developed by the Eugene-Springfield MPO for TransPlan were approved by LCDC in 2001, and adopted as part of TransPlan in 2002. Because TransPlan remains the metro area’s regional transportation system plan, the standards adopted by LCDC in 2001 are still in effect, and applicable, today.

Therefore, the Eugene 2035 TSP retains the LCDC-approved standards as required by the TPR and sets forth benchmarks that advance progress towards increasing transportation choices and reducing reliance on the automobile, and better reflect local targets for bicycle, walking, and transit travel and achieving the land use patterns promoted by Envision.
Eugene, A Community Vision for 2032.

Attachment D to the 2035 TSP sets forth benchmarks to assure that the City is making satisfactory progress towards meeting the standards approved by LCDC in 2001. The benchmarks in Attachment D include regular intervals over the 2035 TSP’s 20-year planning for the City to evaluate its progress toward meeting the Alternatives Performance Measures approved by LCDC in 2001 for the Eugene-Springfield MPO.

(10) Transportation uses or improvements listed in OAR 660-012-0065(3)(d) to (g) and (o) and located in an urban fringe may be included in a TSP only if the improvement project identified in the Transportation System Plan as described in section (12) of this rule, will not significantly reduce peak hour travel time for the route as determined pursuant to section (11) of this rule, or the jurisdiction determines that the following alternatives can not reasonably satisfy the purpose of the improvement project:

(a) Improvements to transportation facilities and services within the urban growth boundary;
(b) Transportation system management measures that do not significantly increase capacity; or
(c) Transportation demand management measures. The jurisdiction needs only to consider alternatives that are safe and effective, consistent with applicable standards and that can be implemented at a reasonable cost using available technology.

The 2035 TSP includes Project No. MM-3: “Construct local arterial bridge over the Willamette River to the north of the Beltline Highway, connecting Division Avenue to Green Acres Road; construct operational improvements to existing Randy Papé Beltline Highway/Delta Highway ramps consistent with the Beltline Highway Facility Plan.” Additionally, the Randy Papé Beltline Facility Plan is adopted as part of the 2035 TSP (Attachment C). The Facility Plan includes recommended improvements to the Randy Papé Beltline Highway, Delta Highway and adjacent arterial street system to improve safety and the long-term operations of the highway between River Road and Coburg Road. This Facility Plan is a precursor to the National Environmental Policy Act (NEPA) process for the implementation of future Randy Papé Beltline Highway projects. The NEPA analysis will include more detailed and rigorous analysis of project impacts and result in a determination as to whether or not one or more of the improvements options can be constructed and, potentially, result in a recommended preferred project that is eligible for federal funding.

If the outcome of the NEPA analysis is that one or more of the improvement options can be constructed, the project description and costs estimates for Project MM-3 will be updated to reflect the improvement option ultimately selected. The City recognizes that construction outside of the urban growth boundary may require a goal exception or UGB amendment. Those land use issues will be resolved together with Lane County. Nevertheless, MM-3 (which may include construction within the urban fringe) can be included in the 2035 TSP because the project is authorized by provisions of OAR 660-012-0065 other than (3)(d) to (g) and (o).
(1) For areas within an urban growth boundary containing a population greater than 2,500 persons, the TSP shall include a transportation financing program.

Cost estimates for all of the planned facilities and major improvements (i.e., “projects”) are included in Chapter 5. Chapter 6 contains a summary of all project costs, by prioritization category, a projection of revenue and a financing and implementation plan.

(2) A transportation financing program shall include the items listed in (a)-(d):

- The TSP contains all the required components of the 0040(2) finance plan:
  - policies to guide selection of transportation facility and improvement projects for funding in the short-term to meet the standards and benchmarks established pursuant to 0035(4)-(6). The policies, contained in Chapter 2, consider and include facilities and improvements that support mixed-use, pedestrian friendly development and increased use of alternative (non-automobile) modes of transportation.

(a) A list of planned transportation facilities and major improvements;

Chapter 5 lists all of the planned transportation facilities and major improvements, by mode.

(b) A general estimate of the timing for planned transportation facilities and major improvements;

All of the planned transportation facilities and major improvements are contained in Chapter 5 and are prioritized in the following categories for general timing: projects within 20 years, projects to complete upon development of adjacent lands, projects that could be completed beyond the 20-year planning horizon if conditions change and the TSP is amended, and projects requiring further study prior to establishing a timing for funding and implementation.

(c) A determination of rough cost estimates for the transportation facilities and major improvements identified in the TSP; and

Chapter 5 lists all of the planned transportation facilities and major improvements, by mode and their associated cost estimates.

(d) In metropolitan areas, policies to guide selection of transportation facility and improvement projects for funding in the short-term to meet the standards and benchmarks established pursuant to 0035(4)-(6). Such policies shall consider, and shall include among the priorities, facilities and improvements that support mixed-use, pedestrian friendly neighborhoods, increase use of active modes of transportation, and reduce reliance on travel by single-occupant automobile. These priorities include improved convenience and safety for walking, biking, and connections to transit stops; improved transit service...
development and increased use of alternative modes.

in Key Corridors; bikeway improvements near the University of Oregon, downtown Eugene, and on streets connecting residential areas to schools and commercial hubs; a railroad quiet zone in the downtown and Whiteaker areas; investments that facilitate job growth in high priority employment opportunity sites; and priority parking and reduced parking fees for non-gasoline powered vehicles.

Goal 1 of the 2035 TSP states: “Create an integrated transportation system that is safe and efficient; supports the Metro Plan’s land use diagram and Envision Eugene, A Community Vision for 2032 (2012), the City of Eugene’s target for a 50 percent reduction in fossil fuel consumption, and other City land use and economic development goals; reduces reliance on single-occupancy automobiles; and enhances community livability.”

The 2035 TSP contains many policies that prioritize facilities and improvements that support mixed-use, pedestrian friendly development and increased use of alternative modes, including the following:

Roadway Policy 1: “Design, construct, maintain, and operate all streets to provide comprehensive and integrated transportation networks that serve people of all ages and abilities, promote commerce, and support the comprehensive land use plan’s vision for growth and development in a responsible and efficient manner. A “complete street” allows safe travel for automobiles and emergency responders, bicycles, walking, transit, and freight. In addition to fulfilling a street’s basic transportation functions and providing access to properties, streets and sidewalks should be designed to be attractive, safe, accessible, sustainable, and healthy components of the City’s environment.”

Pedestrian Policy 1: “Encourage walking as the most attractive mode of transportation for short trips (e.g., within .5 miles) within and to activity centers, downtown, key corridors, and major destinations, and as a means of accessing transit.”

Pedestrian Policy 3: “Coordinate improvements to complement and improve the systems proposed in the Eugene Trails Plan and connections to regional trails.”

Bicycle Policy 2: “Develop a well-connected and
comfortable bikeway network. Ensure that there are safe, comfortable, and direct bikeway connections between residential areas, major destinations, and transit stops and provide secure bicycle parking facilities at these destinations.”

(3) The determination of rough cost estimates is intended to provide an estimate of the fiscal requirements to support the land uses in the acknowledged comprehensive plan and allow jurisdictions to assess the adequacy of existing and possible alternative funding mechanisms. In addition to including rough cost estimates for each transportation facility and major improvement, the transportation financing plan shall include a discussion of the facility provider’s existing funding mechanisms and the ability of these and possible new mechanisms to fund the development of each transportation facility and major improvement. These funding mechanisms may also be described in terms of general guidelines or local policies.

Chapter 5 lists all of the planned transportation facilities and major improvements, by mode and their associated cost estimates. Chapter 6 includes a summary of cost estimates, by prioritization category, a forecast of revenue based on existing funding mechanisms and potential new mechanisms, and a plan for implementation. Additionally, Chapter 2 includes policies and potential action items specific to cost effectiveness and finance.

The planning level cost estimates provided in Chapter 5 of the 2035 TSP provide an estimate of the fiscal requirements to support the land uses in the acknowledged comprehensive plan and allow the assessment of the adequacy of existing and alternative funding mechanisms. The transportation financing plan (Chapter 6) includes a discussion of the facility provider’s existing funding mechanisms and the ability of these and possible new mechanisms to fund the development of each transportation facility and major improvement.

(5) The transportation financing program shall provide for phasing of major improvements to encourage infill and redevelopment of urban lands prior to facilities and improvements which would cause premature development of urbanizable lands or conversion of rural lands to urban uses.

The planned transportation facilities and major improvements identified in Chapter 5 prioritize pedestrian, bicycle, and transit improvements in Key Corridors that encourage infill and redevelopment. A system-wide policy of the 2035 TSP is fostering neighborhoods where Eugene residents can meet most of their basic daily needs without an automobile by providing streets, sidewalks, bikeways, and access to transit in an inviting environment where all travelers feel safe and secure. The related potential action item is the creation of a strategy to facilitate 90 percent of Eugene residences to be within 20-minute neighborhoods.

The 2035 TSP also supports the land use strategies defined in the 2012 Envision Eugene, A Community Vision for 2032 and prioritizes recommendations that mitigate the strain on roadways by supporting transit service and making walking and bicycling trips more
practical for working, shopping, and other daily activities; managing congestion; and improving safety. One primary focus of both the Metro Plan and Envision Eugene is on more compact development. As such, significant future residential development is likely to occur in the Downtown and “Key Corridors” (see Volume 2, Appendix E), including: Willamette Street, W 11th Avenue, Highway 99N, River Road, Coburg Road, and Franklin Boulevard. The 2035 TSP includes projects and programs, and identifies financial resources, that support the growth anticipated over the next 20 years along these key corridors.

The transportation financing program (Chapters 5 and 6) provides for phasing of major improvements to encourage infill and redevelopment of urban lands prior to facilities and improvements which would cause premature development of urbanizable lands or conversion of rural lands to urban uses. The 2035 TSP does not promote extension of streets outside the UGB that would promote urbanization of rural lands.

<table>
<thead>
<tr>
<th>OAR 660-012-0060 Plan and Land Use Regulation Amendments</th>
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<tbody>
<tr>
<td>(1) If an amendment to a functional plan, an acknowledged comprehensive plan, or a land use regulation (including a zoning map) would significantly affect an existing or planned transportation facility, then the local government must put in place measures as provided in section (2) of this rule, unless the amendment is allowed under section (3), (9) or (10) of this rule. A plan or land use regulation amendment significantly affects a transportation facility if it would:</td>
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<tr>
<td>(a) Change the functional classification of an existing or planned transportation facility (exclusive of correction of map errors in an adopted plan);</td>
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<td>(b) Change standards implementing a functional classification system; or</td>
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<tr>
<td>(c) Result in any of the effects listed in paragraphs (A) through (C) of this subsection based on projected conditions measured at the end of the planning period identified in the adopted TSP. As part of evaluating projected conditions, the amount of traffic projected to be generated within the area of the amendment may be reduced if the amendment</td>
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<tr>
<td>As part of the 2035 TSP adoption package, section 67 of Ordinance No. 20528 will be deleted, thereby lifting the trip cap imposed on the properties rezoned by that ordinance.</td>
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<tr>
<td>Ordinance No. 20528 was adopted in May, 2014, as an Envision Eugene efficiency measure. Ordinance No. 20528 created a new E-2 Mixed Used Employment zone in West Eugene and converted I-1 Campus Industrial zone to the E-1 Campus Employment zone in three areas of the City. Section 67 of Ordinance No. 20528 imposed a trip cap on all of the properties that are subject to a code amendment or zone change that would allow uses that would generate more traffic than is currently allowed on those properties. Specifically, the City imposed trip caps on all of the properties where the currently allowed uses will be expanded, either as a result of the newly-named E-1 zone or a zone change to C-2 or E-2. With the proposed trip caps, traffic generated from the subject properties after the code amendments and zone changes could not have exceed the amount of traffic that could be generated from these properties prior to adoption of the code amendments and zone changes. The trip cap was imposed on a corridor-level, and the</td>
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Exhibit A to an Ordinance Concerning Long Range Transportation Planning
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includes an enforceable, ongoing requirement that would demonstrably limit traffic generation, including, but not limited to, transportation demand management. This reduction may diminish or completely eliminate the significant effect of the amendment.

(A) Types or levels of travel or access that are inconsistent with the functional classification of an existing or planned transportation facility; (B) Degrade the performance of an existing or planned transportation facility such that it would not meet the performance standards identified in the TSP or comprehensive plan; or (C) Degrade the performance of an existing or planned transportation facility that is otherwise projected to not meet the performance standards identified in the TSP or comprehensive plan.

As discussed above, in determining the City’s transportation needs the 2035 TSP modeling assumed that the City will continue to see growth in employment and population between now and the year 2035 in a manner consistent with the existing Comprehensive Plan land use designations, within the existing Urban Growth Boundary (UGB) and consistent with the growth forecast adopted into the Metro Plan. Regarding the population and employment distributions, Staff from the cities of Eugene and Springfield, Lane County and Lane Council of Governments (LCOG) worked collaboratively to identify where the estimated year 2035 population and employment growth might occur within the region as well as within individual areas of each city. Based on these estimates of future job and household growth and distribution, LCOG developed traffic volume forecasts for the city’s collector and arterial street system, using an emme travel demand model. To reflect the efficiency measures adopted by Ordinance No. 20528, the growth and distribution forecasts that served as the basis for the travel demand model included a higher distribution of the employment growth to the newly created E-2 Mixed Used Employment zone in West Eugene and the three areas of the City where I-1 Campus Industrial zone was converted to the E-1 Campus Employment zone.

Based on the modeling, to address the increased travel demand resulting, in part, by the higher distribution of employment growth in the newly created E-2 Mixed Used Employment zone in West Eugene and the three areas of the City where I-1 Campus Industrial zone was converted to the E-1 Campus Employment zone, the 2035 TSP includes the following:

1. Citywide LOS E

2. 1.0 v/c for specified ODOT facilities, including West 11th Avenue from Ed Cone east into
downtown, Coburg Road in the vicinity of the Beltline Highway interchange as well as from Harlow Road to downtown, Randy Papé Beltline/W 11th Avenue.

3. MM-3, Construct local arterial bridge over the Willamette River to the north of the Beltline Highway, connecting Division Avenue to Green Acres Road; construct operational improvements to existing Randy Papé Beltline Highway/Delta Highway ramps consistent with the Beltline Highway Facility Plan.

4. MM-4, Improve I-5/Randy Papé Beltline Highway interchange (project is currently funded and underway).

5. MM-6, Improve frequent transit service and multimodal travel along Coburg Road and transit connections to Springfield.

6. MM-9, West Eugene EmX extension along W 6th, 7th, and 11th Avenues, Garfield and Charnelton Streets (project is currently funded and under construction)

7. MM-14, Upgrade W 11th Avenue consistent with major arterial standards, including provision of four travel lanes, center median, bike lanes, sidewalks on both sides of the road, and planting strips.

8. MM-20, Add lanes on the Randy Papé Beltline Highway and provide intersection improvements at the Randy Papé Beltline Highway/W 11th Avenue and Randy Papé Beltline Highway/Roosevelt Boulevard intersections.

Because the 2035 TSP’s modeling, needs analysis and proposed transportation system recognizes and addresses the increased travel demand anticipated by the newly created E-2 Mixed Used Employment zone in West Eugene and the three areas of the City where I-1 Campus Industrial zone was converted to the E-1 Campus Employment zone, the trip caps imposed by Ordinance No. 20528 can be lifted.
The needs assessment and resulting projects (set forth in Chapter 4) that establish a transportation system adequate to meet the identified local transportation needs are based upon the land use designations established by the Metro Plan. Because the 2035 TSP is based on the Metro Plan land use designations, any zone allowed within the land use designation is consistent with both the Metro Plan and this 2035 TSP. Looking ahead, when the City adopts a new comprehensive plan, unless the new comprehensive plan changes the current Metro Plan land use designations, a zone allowed within the land use designation will be consistent with both the new comprehensive plan and this 2035 TSP. If adoption of the new comprehensive plan includes an expansion of the UGB, any amendments to the 2035 TSP that are necessary to address the expansion area will be adopted currently with the UGB amendment.

### Goal 13 - Energy Conservation

To conserve energy.

The amendments do not impact energy conservation. Therefore, Statewide Planning Goal 13 does not apply.

### Goal 14 - Urbanization

To provide for an orderly and efficient transition from rural to urban land use.

The City is currently in compliance with Goal 14. The amendments will not change the TransPlan and Metro Plan provisions adopted to preserve the distinction between urban and rural uses through the development of policies and programs that provide for more efficient urban uses within the UGB, thus preserving rural lands for rural uses.

While the City is in the midst of creating a comprehensive land use plan for 2035 that may include future UGB expansion areas, these amendments are for the existing Eugene UGB and do not address any future UGB expansion areas that may occur. If expansion areas are eventually approved, the 2035 TSP will need to be updated to include those areas. The amendment updates the transportation section of the Metro Plan through incorporating the 2035 TSP. The 2035 TSP ensures compliance with Oregon Administrative Rule 660-012, which governs transportation system development in the state and requires conformance with the Regional Transportation Plan. The adoption of these amendments does not alter the City’s compliance with Goal 14. The amendment is consistent with this goal.

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(9) Notwithstanding section (1) of this rule, a local government may find that an amendment to a zoning map does not significantly affect an existing or planned transportation facility if all of the following requirements are met.

(a) The proposed zoning is consistent with the existing comprehensive plan map designation and the amendment does not change the comprehensive plan map;
(b) The local government has an acknowledged TSP and the proposed zoning is consistent with the TSP; and
(c) The area subject to the zoning map amendment was not exempted from this rule at the time of an urban growth boundary amendment as permitted in OAR 660-024-0020(1)(d), or the area was exempted from this rule but the local government has a subsequently acknowledged TSP amendment that accounted for urbanization of the area.
**Goal 15 - Willamette River Greenway.** To protect, conserve, enhance and maintain the natural, scenic, historical, agricultural, economic and recreational qualities of lands along the Willamette River as the Willamette River Greenway.

The Willamette River Greenway area with the Urban Growth Boundary is governed by existing local provisions that have been acknowledged as complying with Goal 15. Those provisions will be unchanged by the amendments. The amendments will not change TransPlan’s and the Metro Plan’s provisions related to the protection and maintenance of the scenic, historical, economic and recreational qualities of lands along the Willamette River. Further, the amendments will not affect TransPlan’s and the Metro Plan’s compliance with Goal 15.

Nearly all of projects in the Eugene 2035 Transportation System Plan are located outside of the Willamette River Greenway area. Individual transportation projects that are located in the Willamette River Greenway are required to conduct an individual analysis of Goal 15 compliance during the project development phase of work. This proposed amendment is consistent with this goal.

**Goal 16 through 19 - Estuarine Resources, Coastal Shorelands, Beaches and Dunes, and Ocean Resources.**

There are no coastal, ocean, estuarine, or beach and dune resources related to the property effected by these amendments. Therefore, these goals are not relevant and the amendments will not affect compliance with Statewide Planning Goals 16 through 19.

**(2) The proposed amendment does not make the Metro Plan internally inconsistent.**

Until now, TransPlan, adopted as a functional plan to the Metro Plan, served as the City’s regional transportation system plan (RTSP), local transportation system plan, and pedestrian and bicycle master plan. While TransPlan will continue to serve as the City’s RTSP, the 2035 TSP will serve as the City’s local transportation system and as the City’s pedestrian and bicycle master plan. Because TransPlan will continue to serve as the RTSP for Eugene, Springfield, and Metropolitan Lane County until a new RTSP is adopted, TransPlan remains a functional plan of the Metro Plan. The 2035 TSP, also adopted as part of the Metro Plan, must be consistent with TransPlan. In addition to the findings set forth in Table A (OAR 660-012-0015) and the findings set forth regarding the consistency between the 2035 TSP and the Transportation Element of the Metro Plan (which are incorporated herein by reference), the findings set forth below demonstrate that the 2035 TSP (and corresponding Metro Plan and TransPlan amendments) are consistent with both TransPlan and the Metro Plan and will not make the documents internally inconsistent.

**TransPlan**

The 2035 TSP is consistent with TransPlan’s goals and policies. The following table (Findings Table B) provides a comparison and consistency evaluation between the goals and policies contained in TransPlan and the 2035 TSP.
### TransPlan and 2035 TSP Consistency

<table>
<thead>
<tr>
<th>TransPlan Goals</th>
<th>Complimentary 2035 TSP Goals</th>
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<tr>
<td>Provide an integrated transportation and land use system that supports choices in modes of travel and development patterns that will reduce reliance on the auto and enhance livability, economic opportunity, and the quality of life.</td>
<td>Create an integrated transportation system that is safe and efficient; supports the Metro Plan’s land use diagram and Envision Eugene, A Community Vision for 2032 (2012), the City of Eugene’s target for a 50 percent reduction in fossil fuel consumption, and other City land use and economic development goals; reduces reliance on single-occupancy automobiles; and enhances community livability.</td>
</tr>
<tr>
<td>Enhance the Eugene-Springfield metropolitan area’s quality of life and economic opportunity by providing a transportation system that is: a) Balanced, b) Accessible, c) Efficient, d) Safe, e) Interconnected, f) Environmentally responsible, g) Supportive of responsible and sustainable development, h) Responsive to community needs and neighborhood impacts, and i) Economically viable and financially stable.</td>
<td>Advance regional sustainability by providing a transportation system that improves economic vitality, environmental health, social equity, and overall well-being. Strengthen community resilience to changes in climate, increases in fossil fuel prices, and economic fluctuations by making the transportation networks diverse, adaptable, and not reliant on any single mode. Address the transportation needs and safety of all travelers, including people of all ages, abilities, races, ethnicities, and incomes. Through transportation investments, respond to the needs of system users, be context sensitive, and distribute the benefits and impacts of transportation decisions fairly throughout the city. By the year 2035 triple the percentage of trips made on foot, by bicycle, and by transit from 2014 levels. [Note: Eugene used the Triple Bottom Line standard for sustainable planning.]</td>
</tr>
</tbody>
</table>

### TransPlan Policy Topic Areas

<p>| Land Use / Nodal Development                                                                 | Key Corridor Planning, Services                                                                         |
| Transit-Supportive land use patterns                                                      | Key Corridor Planning, Services                                                                         |
| Multi-modal improvements                                                                    | Multi-modal improvements, Complete Streets policy                                                     |
| Transportation Demand Management                                                           | Transportation Demand Management/TSMO                                                                   |</p>
<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Congestion Management</td>
<td>TDM, ITS, and new LOS standards</td>
</tr>
<tr>
<td>Parking Management</td>
<td>Parking Management, code review</td>
</tr>
<tr>
<td>Transportation Infrastructure Protection</td>
<td>Transportation Infrastructure Protection, maintenance</td>
</tr>
<tr>
<td>Intermodal connectivity</td>
<td>Intermodal connectivity</td>
</tr>
<tr>
<td>Corridor preservation</td>
<td>Rights-of-way preservation, reuse</td>
</tr>
<tr>
<td>Neighborhood livability</td>
<td>Walkable neighborhoods, inviting environment, neighborhood context, neighborhood safety, equity between neighborhoods, community engagement, community health</td>
</tr>
<tr>
<td>Mobility, LOS</td>
<td>Mobility, travel time reliability, updated LOS</td>
</tr>
<tr>
<td>Safety</td>
<td>Safety, Vision Zero’s “no loss of life is acceptable”</td>
</tr>
<tr>
<td>Emergency Response</td>
<td>Emergency response as important component of a Complete Street</td>
</tr>
<tr>
<td>Coordinated roadway network</td>
<td>Complete Streets, connectivity, connections between modes</td>
</tr>
<tr>
<td>Access management, Efficiency</td>
<td>Improved circulation, ITS</td>
</tr>
<tr>
<td>Improved transit, BRT, HOV priority, park &amp; ride</td>
<td>Improved transit (goal of doubling ridership), BRT, frequent transit networks and Key Corridors. Park and ride facility is in project list.</td>
</tr>
<tr>
<td>Support for bike systems on roadways, especially arterial and collector roadways</td>
<td>Support for complete bike network, improved signage, protections from vehicles, bike share program, bike parking.</td>
</tr>
<tr>
<td>Bikeway connections to new development</td>
<td>Bikeway connections to new development</td>
</tr>
<tr>
<td>Pedestrian environment that is safe, comfortable, continuous and direct</td>
<td>“Ensure that there are safe, accessible, comfortable, and direct sidewalk connections between residential areas, major destinations, and transit stops. Continually improve walking comfort, safety, and accessibility through design, operations, retrofits, and maintenance. Provide landscaped setback sidewalks of ample width and safe street crossings to encourage people to walk.”</td>
</tr>
<tr>
<td>reasonable and reliable travel times for freight</td>
<td>Travel time reliability, recognition of designated freight routes. “Encourage public and private transport.”</td>
</tr>
<tr>
<td>Supports Cascadia High Speed Rail Corridor</td>
<td>Supports Cascadia High Speed Rail Corridor</td>
</tr>
<tr>
<td>Supports Eugene airport, Airport Master Plan</td>
<td>Supports Eugene airport, Airport Master Plan</td>
</tr>
<tr>
<td>Supports rail – bus connections</td>
<td>Supports all intermodal connections</td>
</tr>
<tr>
<td>Support adequate funding</td>
<td>Supports funding transportation improvements, encourages continued public involvement and support for transportation improvements. Project list is fundable given current funding projections.</td>
</tr>
<tr>
<td>Operate and maintain transportation facilities in a way that reduces the need for more expensive future repair.</td>
<td>Operate and maintain transportation facilities in a way that reduces the need for more expensive future repair.</td>
</tr>
<tr>
<td>Set priorities for investment of Oregon and federal revenues</td>
<td>Priorities are set by policies.</td>
</tr>
<tr>
<td>Maintain transportation performance and improve safety by improving system efficiency and management before adding capacity to the transportation system</td>
<td>Maintain transportation performance and improve safety by improving system efficiency and management before adding capacity for automobiles to the transportation system by using the following priorities for developing the Eugene Capital Improvement Program (CIP) and Eugene projects in the Metropolitan Transportation Improvement Program (MTIP): Protect the existing system. The highest priority is to preserve or improve the functionality of the existing transportation system by means such as access management, transportation demand management, improved traffic operations, technologies, accommodating “active transportation” options not previously present, and keeping roads well maintained to avoid reconstruction. Improve the efficiency and safety of existing facilities. The second priority is to make minor improvements to existing streets, such as adding turning lanes at intersections, providing and enhancing pedestrian, bicycle and transit facilities, and extending or connecting streets pursuant to existing plans. Add capacity to the existing system. The third priority is to make major improvements to existing transportation facilities such as adding general purpose lanes and making alignment corrections to accommodate legal-sized vehicles. Add new facilities to the system. The lowest priority is to add new transportation facilities for motorized vehicles, such as new roadways. New streets that are needed and planned for connectivity are a higher priority, as noted in (b), above.</td>
</tr>
</tbody>
</table>
The manner in which the 2035 TSP supports and advances the alternative performance standards approved by LCDC in 2001 and adopted as part of TransPlan are set forth above in the Goal 12 findings (Findings Table A). Those detailed findings are incorporated herein by reference.

**Metro Plan**

Chapter III of the Metro Plan contains eleven specific elements that address a comprehensive list of topics, including (A) Residential Land Use and Housing Element (B) Economic Element (C) Environmental Resources Element (D) Willamette River Greenway, River Corridors, and Waterways Element (E) Environmental Design Element (F) Transportation Element (G) Public Facilities and Services Element, and (H) Parks and Recreation Facilities Element. Findings for relevant policies from each element are contained in this report. Applicable Metro Plan policies are italicized.

The following policies from the Metro Plan (identified below in italics) are applicable to these amendments. Based on the findings provided below, the amendments are consistent with and supported by the applicable provisions of the Metro Plan.

A. **Metro Plan Residential Land Use and Housing Element**

The 2035 TSP is based on the Metro Plan’s land use plan and is consistent with the population projections inherent in that plan. The 2035 TSP does not change the Metro Plan’s land use or housing element, or change the desired mix, location, density, or tenure of the region’s housing plan. This Residential Land Use and Housing Element and Residential Land and Housing Needs Analysis contains the following relevant housing policies related to the 2035 TSP.

A.7 **Endeavor to provide key urban services and facilities required to maintain a five-year supply of serviced, buildable residential land.**

A.8 **Require development to pay the cost, as determined by the local jurisdiction, of extending public services and infrastructure. The cities shall examine ways to provide subsidies or incentives for providing infrastructure that support affordable housing and/or higher density housing.**

A.10 **Promote higher residential density inside the UGB that utilizes existing infrastructure, improves the efficiency of public services and facilities, and conserves rural resource lands outside the UGB.**

The 2035 TSP contains multiple goals and policies that support the above stated housing policies and land use efficiency measures. These TSP goals and policies include, but are not limited to:

- Goal 1: Create an integrated transportation system that is safe and efficient; supports the Metro Plan’s land use diagram and Envision Eugene, A Community Vision for 2032 (2012), the City of Eugene’s target for a 50 percent reduction in fossil...
fuel consumption, and other City land use and economic development goals; reduces reliance on single-occupancy automobiles; and enhances community livability.

• Policy: Prioritize improved transit service in Key Corridors and other areas with sufficient employment, activities, or residential density that best support transit service and transit services that connect residents to employment centers. If operational funding is sufficient, extend transit to support higher density housing and employment development planned for other areas.

• Policy: Foster neighborhoods where Eugene residents could meet most of their basic daily needs without an automobile by providing streets, sidewalks, bikeways, and access to transit in an inviting environment where all travelers feel safe and secure.

The above stated TSP goal and policies are examples of consistency between the Eugene 2035 TSP and relevant Metro Plan Residential Land Use and Housing policies. The proposed amendments will further support and enhance the Metro Plan’s Residential Land Use and Housing Element through strengthening multi-modal connections, enhancing bike, pedestrian and transit facilities and target multi-modal infrastructure in higher density, mixed use areas throughout Eugene. The proposed amendments are consistent with this Metro Plan Element.

B. Metro Plan Economic Element

The Economic Element of the Metro Plan addresses the economic needs of current and future residents of the metropolitan area. The overarching economic goal of the Metro Plan Element is to, “Broaden, improve, and diversify the metropolitan economy while maintaining or enhancing the environment.”

The Economic Element of the Metro Plan contains the following relevant economic policies related to the Eugene 2035 TSP:

B.11 Encourage economic activities, which strengthen the metropolitan area’s position as a regional distribution, trade, health, and service center.

B.14 Continue efforts to keep the Eugene and Springfield central business districts as vital centers of the metropolitan area.

B.17 Improve land availability for industries dependent on rail access.

B.18 Encourage the development of transportation facilities which would improve access to industrial and commercial areas and improve freight movement capabilities by implementing the policies and projects in the Eugene-Springfield Metropolitan Area Transportation Plan (TransPlan) and the Eugene Airport Master Plan.

B.19 Local jurisdictions will encourage the allocation of funds to improve transportation access to key industrial sites or areas through capital budgets and priorities.

B.28 Recognize the vital role of neighborhood commercial facilities in providing services and goods to a particular neighborhood.
The 2035 TSP does not modify the industrial designation of any lands. The 2035 TSP contains the goals and policies that support the Metro Plan’s economic policies:

- **Goal 2:** Advance regional sustainability by providing a transportation system that improves economic vitality, environmental health, social equity, and overall well-being.

- **Policy:** Prioritize improved transit service in Key Corridors and other areas with sufficient employment, activities, or residential density that best support transit service and transit services that connect residents to employment centers. If operational funding is sufficient, extend transit to support higher density housing and employment development planned for other areas.

- Improve travel time reliability between key origins and destinations for transit, regional freight movement, and other trips for which on-time arrivals are important.

- Facilitate efficient access for goods, employees, and customers to and from employment, commercial, and industrial lands, including freight access to designated freight routes, highways, rail yard, and the Eugene Airport. Increase multimodal access for employees to employment centers.

- Support ODOT’s efforts to improve Randy Papé Beltline Highway for transportation system efficiency, improved safety, and improved connections for people travelling by foot, bike, and bus. The Beltline Highway: Coburg Road to River Road Facility Plan is incorporated into this TSP, contained in Volume 2. The City of Eugene supports completion of the NEPA review, and implementation of the resultant recommended improvements.

- Encourage walking as the most attractive mode of transportation for short trips (e.g., within .5 miles) within and to activity centers, downtown, key corridors, and major destinations, and as a means of accessing transit.

- Promote the efficiency with which freight and deliveries are transported without worsening impacts to the environment, social and neighborhood context, promotion of “Complete Streets,” or safety.

- Encourage public and private partnerships with the freight transport industry to develop mutually beneficial strategies and initiatives

- Encourage the use of rail for movement of freight and long distance passenger trips. Support the Eugene Airport as a regional transportation facility.

- Use transportation investments to support industries and employment sectors targeted by City and regional adopted economic development strategies.
The above stated 2035 TSP goals and policies are examples of consistency between the 2035 TSP and relevant Metro Plan economic policies. The TSP will provide a greater range of transportation options for businesses and employees. The proposed amendments are consistent with this Metro Plan Element.

C. Environmental Resources Element

The Environmental Resources Element addresses the natural assets and hazards in the metropolitan area. The policies of this element emphasize reducing urban impacts on wetlands throughout the metropolitan area and planning for the natural assets and constraints on undeveloped lands on the urban fringe.

The Environmental Resources Element of the Metro Plan contains the following relevant goal and policies related to the Eugene 2035 TSP (policies related to forest lands, agricultural lands, and mineral and aggregate resources were omitted because there are no subject lands within the Eugene UGB):

*Goal: Provide a healthy and attractive environment, including clean air and water, for the metropolitan population.*

*C.22 Design of new street, highway, and transit facilities shall consider noise mitigation measures where appropriate.*

*C.23 Design and construction of new noise-sensitive development in the vicinity of existing and future streets and highways with potential to exceed general highway noise levels shall include consideration of mitigating measures, such as acoustical building modifications, noise barriers, and acoustical site planning. The application of these mitigating measures must be balanced with other design considerations and housing costs.*

*C.24 Local governments shall continue to monitor, to plan for, and to enforce applicable noise standards and shall cooperate in meeting applicable federal and state noise standards.*

The City of Eugene has previously adopted Goal 5 habitat resource protections, stormwater protection measures, and open space plans, none of which will change as a result of this TSP amendment. The 2035 TSP contains goals and policies which support these environmental policies, including, but not limited to the following:

- Goal 2: Advance regional sustainability by providing a transportation system that improves economic vitality, environmental health, social equity, and overall well-being.
- Goal 3: Strengthen community resilience to changes in climate, increases in fossil fuel prices, and economic fluctuations by making the transportation networks diverse, adaptable, and not reliant on any single mode.
- Create a railroad quiet zone throughout the City. Prioritize implementation of a quiet zone in the downtown and Whiteaker areas.
- Avoid, protect, and enhance habitat in transportation projects where possible. Minimize and
mitigate impacts when needed.

- Support the use of more highly fuel efficient vehicles including electric, hydrogen fuel cell, and non-motorized vehicles.
- Create a strategy that advances the goal of having an integrated transportation system that reduces fossil fuel consumption by 50 percent and reduces reliance on single-occupancy automobiles.
- Prioritize capital projects and programs that will facilitate the achievement of the 2035 TSP’s pedestrian, bicycle and transit policies.
- Continue work to identify possible transportation infrastructure improvements that will make walking, bicycling and the use of transit safe and highly convenient.
- Protect, and enhance habitat in transportation projects where possible. Minimize and mitigate impacts of transportation projects when needed.
- Provide leadership in regional and State coordination efforts that support Eugene’s environmental policies.

The above stated TSP goals and policies are examples of consistency between the Eugene 2035 TSP and relevant Metro Plan environmental policies. The proposed amendments will support and enhance the Metro Plan’s Environmental Resources Element through strengthening environmentally sound transportation options and an overall more sustainable transportation system. The 2035 TSP strives to reduce vehicle-related greenhouse gas emissions and look at alternative energy infrastructure. The proposed amendments are consistent with this Metro Plan Element.

**D. Willamette River Greenway, River Corridors, and Waterways Element**

The Willamette River Greenway, River Corridors, and Waterways Element address these specific natural assets in the metropolitan area. The policies of this element emphasize reducing urban impacts on these resources throughout the metropolitan area.

The Willamette River Greenway, River Corridors, and Waterways Element of the Metro Plan contain the following relevant policies related to the Eugene 2035 TSP:

*D.2 Land use regulations and acquisition programs along river corridors and waterways shall take into account all the concerns and needs of the community, including recreation, resource, and wildlife protection; enhancement of river corridor and waterway environments; potential for supporting non-automobile transportation; opportunities for residential development; and other compatible uses.*

*D.9 Local and state governments shall continue to provide adequate public access to the Willamette River Greenway.*
D.11 The taking of an exception shall be required if a non-water-dependent transportation facility requires placing of fill within the Willamette River Greenway setback.

As described in the text of the 2035 TSP, the Willamette River is a major influence on the city’s transportation system but riverine travel is not a functioning mode of transportation in modern times. Eugene enjoys a substantial pedestrian-bicycle shared-use path system parallel to the Willamette River. Although the pathway system is extensive, existing needs are related to the width times. As described in the text of the TSP, they must meet the conditions of the Eugene Code before they consistent with the Eugene Code contains provisions for protecting the Willamette Greenway.

The Eugene Code contains provisions for protecting the Willamette Greenway and proposes several potential improvements to the shared use paths within the Willamette Greenway and several studies for potential street or crossing improvements.

The 2035 TSP contains goals and polices which support these Willamette River Greenway, River Corridors, and Waterways policies. These include, but are not limited to:

- Goal: Advance regional sustainability by providing a transportation system that improves economic vitality, environmental health, social equity, and overall well-being.

- Support ODOT’s efforts to improve Randy Papé Beltline Highway for transportation system efficiency, improved safety, and improved connections for people travelling by foot, bike, and bus. The Beltline Highway: Coburg Road to River Road Facility Plan is incorporated into this TSP, contained in Volume 2. The City of Eugene supports completion of the NEPA review, and implementation of the resultant recommended improvements.

In addition to the Randy Papé Beltline Highway study referenced in the policy above, the 2035 TSP proposes several potential improvements to the shared use paths within the Willamette Greenway and several studies for potential street or crossing improvements.

The 2035 TSP goal and policies and Eugene Code protections are examples of consistency between the Eugene 2035 TSP and relevant Metro Plan Willamette River Greenway, River Corridors, and Waterways policies. The proposed amendment will support and enhance the Metro Plan’s Willamette River Greenway, River Corridors, and Waterways Element through by providing improved access to waterways. The proposed amendments are consistent with this Metro Plan Element.

E. Environmental Design Element

The Environmental Design Element is concerned with that broad process which molds the various components of the urban area into a distinctive, livable form that promotes a high quality of life. This Element is concerned with how people perceive and interact with their surroundings.
The Environmental Design Element of the *Metro Plan* contains the following relevant policies related to the Eugene 2035 TSP: E.3 and E.4.

**E.3** *The planting of street trees shall be strongly encouraged, especially for all new developments and redeveloping areas (where feasible) and new streets and reconstruction of major arterials within the UGB.*

**E.4** *Public and private facilities shall be designed and located in a manner that preserves and enhances desirable features of local and neighborhood areas and promotes their sense of identity.*

The Eugene 2035 TSP contains goals and polices which support these Environmental Design policies. These include, but are not limited to:

- **Goal 4:** Address the transportation needs and safety of all travelers, including people of all ages, abilities, races, ethnicities, and incomes. Through transportation investments, respond to the needs of system users, be context sensitive, and distribute the benefits and impacts of transportation decisions fairly throughout the city.

- **Enhance the tree canopy along streets.**

- **Provide stormwater facilities within street construction projects by incorporating low impact development and green infrastructure practices.**

- **Design, construct, maintain, and operate all streets to provide comprehensive and integrated transportation networks that serve people of all ages and abilities, promote commerce, and support the comprehensive land use plan’s vision for growth and development in a responsible and efficient manner.** A “complete street” allows safe travel for automobiles and emergency responders, bicycles, walking, transit, and freight. In addition to fulfilling a street’s basic transportation functions and providing access to properties, streets and sidewalks should be designed to be attractive, safe, accessible, sustainable, and healthy components of the City’s environment.

The above stated 2035 TSP goals and policies are examples of consistency between the 2035 TSP and relevant Environmental Design policies. The proposed amendments will further support and enhance the *Metro Plan’s* Environmental Design Element by providing greater flexibility in future street design. The 2035 TSP will also enhance the bicycle and pedestrian environment for new and redeveloped properties, creating a more liveable community. The proposed amendments are consistent with this *Metro Plan* Element.

**F. Transportation Element**

The *Metro Plan* Transportation Element addresses surface and air transportation in the metropolitan area. The Eugene-Springfield Metropolitan Area Transportation Plan (*TransPlan*) provides the basis for surface transportation. The goals and policies in the *Metro Plan* Transportation Element are identical to those in *TransPlan*, as *TransPlan* serves as the functional plan for transportation issues in the Metro Area.
Policies in the *Metro Plan* Transportation Element are organized by the following four topics related to transportation: Land Use, Transportation Demand Management, Transportation System Improvements, and Finance.

While all of the *Metro Plan* Transportation Element goals and policies are relevant to the 2035 TSP, specific *Metro Plan* policies are highlighted in this Finding to illustrate consistency between *Metro Plan* policies and those of the Eugene 2035 TSP.

- **Metro Plan Land Use Policy F.4: Require improvements that encourage transit, bicycles, and pedestrians in new commercial, public, mixed use, and multi-unit residential development.**
  - **2035 TSP Policies:**
    - [“Complete Streets Policy”] Design, construct, maintain, and operate all streets to provide comprehensive and integrated transportation networks that serve people of all ages and abilities, promote commerce, and support the comprehensive land use plan’s vision for growth and development in a responsible and efficient manner. A “complete street” allows safe travel for automobiles and emergency responders, bicycles, walking, transit, and freight. In addition to fulfilling a street’s basic transportation functions and providing access to properties, streets and sidewalks should be designed to be attractive, safe, accessible, sustainable, and healthy components of the City's environment.
    - Facilitate efficient access for goods, employees, and customers to and from employment, commercial, and industrial lands, including freight access to designated freight routes, highways, rail yard, and the Eugene Airport. Increase multimodal access for employees to employment centers.
    - Encourage walking as the most attractive mode of transportation for short trips (e.g., within .5 miles) within and to activity centers, downtown, key corridors, and major destinations, and as a means of accessing transit.
    - Create conditions that make bicycling more attractive than driving for most trips of two miles or less.
  - **2035 TSP Potential Action Items:**
    - Articulate a process for implementing the complete streets policy, including responsibilities for decision making, public review, opportunities for appeals of decisions, the means of documenting and justifying decisions, and the collection and reporting of data that allows monitoring the effects of street design changes over time.
    - Update the Eugene *Design Standards and Guidelines for Eugene Streets, Sidewalks, Bikeways and Accessways* to implement the “complete streets policy” . . . .

- **Metro Plan TDM Policy F.8: Implement TDM strategies to manage demand at congested locations.**
  - **2035 TSP Potential Action Items:**
    - Periodically review and update the City Code and administrative rules in the
downtown area, neighborhoods near the University of Oregon, mixed-use centers, and in areas experiencing changing conditions, such as where a transit corridor study has been completed, transit routes changed, or major bicycle facilities completed. Examples of possible changes to the code and policies may include:

- Requiring or allowing fewer parking spaces where conditions would allow less driving.
- Disconnecting the price of a residential parking space from a unit’s rent.
- Aligning metered parking prices with demand.
- Facilitating conversion of on-street automobile parking spaces to bicycle lanes, bike parking, or expanded pedestrian and ground-level business amenities.
- Aligning land use and design standards at major transit stops to support transit ridership.
- Requiring ongoing transportation demand management (TDM) for large attractions and employment centers at times and locations where such measures are necessary to reduce congestion or optimize limited parking.

- *Metro Plan, Transportation System Improvement: System Wide Policy F.11: Develop or promote intermodal linkages for connectivity and ease of transfer among all transportation modes.*
  
  **2035 TSP Policy**

  - Promote connections between modes of transportation to make each mode more efficient, such as by connecting bicycle routes and bus, train, and airport services to each other; and connections to transportation facilities extending outside the City’s planning area.
  - Ensure that there are safe, accessible, comfortable, and direct sidewalk connections between residential areas, major destinations, and transit stops. Continually improve walking comfort, safety, and accessibility through design, operations, retrofits, and maintenance. Provide landscaped setback sidewalks of ample width and safe street crossings to encourage people to walk.
  - Coordinate improvements to complement and improve the systems proposed in the Eugene Trails Plan and connections to regional trails.
  - Develop a well-connected and comfortable bikeway network. Ensure that there are safe, comfortable, and direct bikeway connections between residential areas, major destinations, and transit stops and provide secure bicycle parking facilities at these destinations.
Update Eugene’s Traffic Impact Analysis review regulations for new
development to include review of walking and biking improvements and
connections to nearby networks.

- **Metro Plan, Roadway System F.14: Address the mobility and safety needs of motorists, transit
users, bicyclists, pedestrians, and the needs of emergency vehicles when planning and
constructing roadway system improvements.**

**2035 TSP Policies:**
- Consider safety first when making transportation decisions. Strive for zero
transportation-related fatalities by reducing the number and severity of
crashes through design, operations, maintenance, education, and
enforcement. Prioritize safety improvements for people who walk, bike
and use mobility devices because no loss of life or serious injury on our
streets is acceptable.
- Facilitate prompt emergency responses. Ensure that fire and emergency
response routes remain passable by design.
- Plan for, design and construct or reconstruct streets to achieve consistency
between motorists’ speeds and target speed limits.

**2035 TSP Potential Action Items**
- With Lane County Public Health Department, identify mutual objectives and
opportunities to collaboratively promote bicycle and pedestrian activities,
reduce injury crashes and fatalities, integrate health considerations into
transportation decisions, and improve emergency medical systems.
- Update city design standards, as necessary, to address emergency vehicle
passage on officially recognized emergency response routes and consider
accommodations for Fire Department Ladder Operations where tall
buildings exist or are planned. Involve emergency responders in changes to
street designs.

- **Metro Plan, Transportation System Improvement: Transit System F.18: Improve transit
service and facilities to increase the system’s accessibility, attractiveness, and
convenience for all users, including the transportation disadvantaged population.**

  - Promote the use of public transit and the continued development of
an integrated, reliable, regional public transportation system.
  - Prioritize improved transit service in Key Corridors and other areas
with sufficient employment, activities, or residential density that best
support transit service and transit services that connect residents to
employment centers. If operational funding is sufficient, extend
transit to support higher density housing and employment
development planned for other areas.

- **Metro Plan, Transportation System Improvement: Bicycle System F.22: Construct and improve
the region’s bikeway system and provide bicycle system support facilities for both new
development and redevelopment/expansion.**

**2035 TSP Policies:**
• Create conditions that make bicycling more attractive than driving for most trips of two miles or less.

• Develop a well-connected and comfortable bikeway network. Ensure that there are safe, comfortable, and direct bikeway connections between residential areas, major destinations, and transit stops and provide secure bicycle parking facilities at these destinations.

• Continually improve the comfort and safety of bicycling through design, operations, retrofits, and maintenance. Identify and develop “low stress” bikeways to attract new cyclists.

• Metro Plan, Transit System Improvement: Pedestrian System F.26: Provide for a pedestrian environment that is well integrated with adjacent land uses and is designed to enhance the safety, comfort, and convenience of walking.

2035 TSP Policy:

• Ensure that there are safe, accessible, comfortable, and direct sidewalk connections between residential areas, major destinations, and transit stops. Continually improve walking comfort, safety, and accessibility through design, operations, retrofits, and maintenance. Provide landscaped setback sidewalks of ample width and safe street crossings to encourage people to walk.

• Promote connections between modes of transportation to make each mode more efficient, such as by connecting bicycle routes and bus, train, and airport services to each other; and connections to transportation facilities extending outside the City’s planning area.

2035 TSP Potential Action Items:

• Amend the Eugene Code (e.g., EC 9.6505) and policies to consistently require sidewalk installation throughout newly divided and developed lands, such as by requiring sidewalk construction concurrent with street improvements or by bonding for completion of the sidewalks if development on individual lots does not fill in the system in a reasonable amount of time.

• Maintain a sidewalk infill and improvement program that considers new funding sources, credits and loans, and expanded development requirements to complete missing sidewalk segments, to avoid creating gaps in sidewalk networks in new development areas and to upgrade existing sidewalks in high traffic areas to provide needed width, landscaping, removal of barriers, and to implement the City’s Americans with Disability Act program.

• Metro Plan Finance Policy F.34: Operate and maintain transportation facilities in a way that reduces the need for more expensive future repair.

2035 TSP Policy:

• Establish, improve, and maintain transportation facilities in ways that cost-effectively provide desired levels of service, consider facilities’ lifecycle costs, and maintain the City’s long-term financial sustainability. Favor
transportation systems that move people and goods at lesser total life-cycle cost to the City and its residents.

- Improve system efficiency, safety, and management and re-purpose existing rights-of-way to include high-quality facilities for transit, walking, and bicycling before widening streets to expand capacity for motorized vehicles.

- **Metro Plan Policy F.15: Motor Vehicle Level of Service.**
  - The Levels of Service targets for Eugene will be amended in TransPlan and the Metro Plan concurrently with adoption of the 2035 TSP to maintain policy consistency between the documents.

The above stated Metro Plan and 2035 TSP policy sets are examples of the overall consistency between the Eugene 2035 TSP and the Metro Plan’s Transportation Element policies. The proposed amendment will further support multi-modal transportation and its nexus to mixed use development as promoted by the Metro Plan and TransPlan. The proposed amendments are consistent with this Metro Plan Element.

**G. Public Facilities and Services Element**

This element incorporates the findings and policies in the Eugene-Springfield Metropolitan Area Public Facilities and Services Plan (Public Facilities and Services Plan), adopted as a refinement to the Metro Plan. The Public Facilities and Services Plan provide guidance for public facilities and services, including planned water, wastewater, stormwater, and electrical facilities. Transportation findings and policies are not part of the Eugene-Springfield Metropolitan Area Public Facilities and Services Plan, but rather are located in TransPlan and 2035 TSP. The 2035 TSP supports the public facilities policies of this element with this policy, as one example: “Reduce stormwater pollution and minimize runoff from streets and multi-use paths in a manner prescribed by Eugene’s Comprehensive Stormwater Management Plan.”

Other relevant Metro Plan policies are discussed in the previous Transportation Element section. The proposed amendments are consistent with this Metro Plan Element.

**H. Parks and Recreation Facilities Element**

This Metro Plan Element addresses Parks and Recreation Facilities in the Metro Area. There are no transportation-specific Parks and Recreation Facilities Element policies in the Metro Plan that directly relate to the 2035 Eugene Transportation System Plan. However, some TSP multiuse path projects overlap with recreational needs and were coordinated with City parks planners.

One example of consistency between this Eugene 2035 TSP and the Metro Plan Parks and Recreation Facilities Elements are these policies that recognize and support recreational use of the transportation system:

- Improve community health by designing streets and paths to encourage increased physical activity by the public.
• Promote connections between modes of transportation to make each mode more efficient, such as by connecting bicycle routes and bus, train, and airport services to each other; and connections to transportation facilities extending outside the City’s planning area.
• Coordinate improvements to complement and improve the systems proposed in the Eugene Trails Plan and connections to regional trails.

The amendments do not alter compliance with, and are consistent with, the Parks and Recreation Facilities Element of the *Metro Plan*.

I. Historic Preservation Element

This Element of the *Metro Plan* is written to preserve historic structures in the Metro area. There are no transportation specific Historic preservation Element policies in the *Metro Plan* that directly relate to the 2035 Eugene Transportation System Plan. However, individual projects in the TSP that use Federal funding must go through a National Environmental Policy Act (NEPA) process during project development. The NEPA process includes requirements for historic preservation that the City will adhere to.

The proposed amendments are consistent with this *Metro Plan* Element.

J. Energy Element

The Energy Element of the *Metro Plan* deals with the conservation and efficient use of energy in the metropolitan area and is meant to provide a long-range guide to energy-related decisions concerning physical development and land uses.

The Energy Element of the *Metro Plan* contains the following relevant policies related to the Eugene 2035 TSP:

*J.2 Carefully control, through the use of operating techniques and other methods, energy related actions, such as automobile use, in order to minimize adverse air quality impacts. Trade-offs between air quality and energy actions shall be made with the best possible understanding of how one process affects the other.*

*J.7 Encourage medium- and high-density residential uses when balanced with other planning policies in order to maximize the efficient utilization of all forms of energy. The greatest energy savings can be made in the areas of space heating and cooling and transportation. For example, the highest relative densities of residential development shall be concentrated to the greatest extent possible in areas that are or can be well served by mass transit, paratransit, and foot and bicycle paths.*

*J.8 Commercial, residential, and recreational land uses shall be integrated to the greatest extent possible, balanced with all planning policies to reduce travel distances, optimize reuse of waste heat, and optimize potential on-site energy generation.*

The Eugene 2035 TSP contains goals and polices that support these Energy Element policies. These include, but are not limited to:
• Goal 1: Create an integrated transportation system that is safe and efficient; supports the Metro Plan’s land use diagram and Envision Eugene, A Community Vision for 2032 (2012), the City of Eugene’s target for a 50 percent reduction in fossil fuel consumption, and other City land use and economic development goals; reduces reliance on single-occupancy automobiles; and enhances community livability.

• Goal 3: Strengthen community resilience to changes in climate, increases in fossil fuel prices, and economic fluctuations by making the transportation networks diverse, adaptable, and not reliant on any single mode.

• Policy: Support the use of more highly fuel efficient and electric, hydrogen cell, and non-motorized vehicles.

The proposed amendment will further support and enhance the Metro Plan’s Energy Element by considering environmental impacts and energy usage when planning and implementing Eugene’s transportation system. The 2035 TSP also supports higher densities for new and redeveloped properties, creating a more livable community and supporting frequent transit service. The proposed amendment are consistent with this Metro Plan Element.

K. Citizen Involvement Element

The Citizen Involvement Element of the Metro Plan recognizes that active, on-going, and meaningful citizen involvement is an essential ingredient to the development and implementation of any successful planning program. A Public Involvement Program for the update of the 2035 Eugene Transportation System Plan was developed in preparation of the project. This program was reviewed and endorsed by the Committee for Citizen Involvement (i.e. the Eugene Planning Commission). The program outlined the information, outreach methods, and involvement opportunities available to the citizens during the process. Details of the process are included in the Statewide Planning Goal 1 finding of this report. The proposed amendment is consistent with the Metro Plan Element.

Conclusion:
Based on the above findings, the proposed Metro Plan amendments, TransPlan amendments and 2035 TSP adoption are all consistent with EC 9.7730 and Lane Code 12.225.

II. Repeal of the Central Area Transportation Study (CATS)

Ordinance No. 20322 (May 24, 2004), adopted the policies in the 2003 Central Area Transportation Study (CATS) as a refinement to the Eugene-Springfield Metropolitan Area General Plan. The adoption of the CATS update in 2004 was part of an ongoing process to improve Eugene’s transportation system. CATS was intended to further refine TransPlan for a specific geographic boundary within Eugene. The 2035 TSP updates and replaces the policies and proposed implementation strategies set forth in CATS. With an up-to-date Eugene-specific transportation system plan, CATS is no longer needed and should be repealed. Eugene’s approval criteria for Refinement Plan amendments is set forth in Eugene Code 9.8424:

9.8424 Refinement Plan Amendment Approval Criteria. The planning commission shall evaluate proposed refinement plan amendments based on the criteria set forth below, and forward a recommendation to the city council. The city council shall decide whether to act on the
application. If the city council decides to act, it shall approve, approve with modifications or deny a proposed refinement plan amendment. Approval, or approval with modifications shall be based on compliance with the following criteria:

1. The refinement plan amendment is consistent with all of the following:
   (a) Statewide planning goals.
   (b) Applicable provisions of the Metro Plan.
   (c) Remaining portions of the refinement plan.

2. The refinement plan amendment addresses one or more of the following:
   (a) An error in the publication of the refinement plan.
   (b) New inventory material which relates to a statewide planning goal.
   (c) New or amended community policies.
   (d) New or amended provisions in a federal law or regulation, state statute, state regulation, statewide planning goal, or state agency land use plan.
   (e) A change of circumstances in a substantial manner that was not anticipated at the time the refinement plan was adopted.

As demonstrated by the findings set forth above, the adoption of the 2035 TSP, which renders CATS unnecessary, is consistent with the statewide planning goals, applicable provisions of the Metro Plan and TransPlan. Those findings are incorporated herein by reference as the basis for repealing CATS. The repeal of CATS is intended to recognize the new community policies set forth in the 2035 TSP. In 2004, when the City adopted CATS, the City did not have a Eugene-specific local transportation plan; the adoption of the 2035 TSP renders CATS unnecessary.

### III. Amendments to Eugene Code Chapter 9

Conforming amendments to Eugene Code Chapter 9 are needed to reflect the adoption of the 2035 TSP as the City’s local transportation system plan and to update the TransPlan policies set forth in Chapter 9 that are being concurrently amended through the proposed ordinance.

Eugene’s approval criteria for code amendment is set forth in EC 9.8065.

#### 9.8065 Code Amendment Approval Criteria. If the city council elects to act, it may, by ordinance, adopt an amendment to this land use code that:

1. Is consistent with applicable statewide planning goals as adopted by the Land Conservation and Development Commission.
2. Is consistent with applicable provisions of the Metro Plan and applicable adopted refinement plans.
3. In the case of establishment of a special area zone, is consistent with EC 9.3020 Criteria for Establishment of an S Special Area Zone.

As demonstrated by the findings set forth above, the amendments to the Metro Plan and TransPlan and the adoption of the 2035 TSP are consistent with the statewide planning goals and are consistent with applicable provisions of the Metro Plan and TransPlan. Those findings are incorporated herein by reference as the basis for adopting the conforming amendments to Chapter 9.
Memorandum

Date: June 20, 2017
To: The file (CA 17-1, MA 17-1, RA 17-1, Z 17-2)
From: Heather O’Donnell, Senior Planner
Subject: Population Growth and the Current Urban Growth Boundary

Over the course of Envision Eugene, many have questioned how the current urban growth boundary (UGB) could still possibly accommodate the next 20 years of housing. The UGB, historically shared with Springfield, was established in 1982 and has never been expanded for residential land.

The table below compares the population growth forecast that the shared UGB was originally based on, to the population growth now anticipated for the same area in 2030/2032. The 1982 Metro Plan forecast was for the combined Eugene and Springfield area. The 2009 forecast from Portland State University (PSU) provided separate forecasts for each of the cities, which are combined below to do the comparison.

<table>
<thead>
<tr>
<th>Source / Year of Forecast</th>
<th>Geography</th>
<th>Forecast Year</th>
<th>Forecasted Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>1982 Metro Plan</td>
<td>Eugene-Springfield</td>
<td>2000</td>
<td>293,700</td>
</tr>
<tr>
<td>2009 Adopted PSU forecast</td>
<td>Eugene</td>
<td>2032</td>
<td>214,693</td>
</tr>
<tr>
<td></td>
<td>Springfield</td>
<td>2030</td>
<td>81,608</td>
</tr>
<tr>
<td></td>
<td>Eugene-Springfield</td>
<td></td>
<td>296,301</td>
</tr>
</tbody>
</table>

The table above shows that the population number used in both the past and present planning efforts is essentially the same. The two cities actually had a significant surplus of residential land since the population estimates were so inaccurately high. Over this time, Eugene’s surplus has decreased, but is not depleted.

In addition, Eugene took land use “efficiency measure” actions to fit more homes inside the current UGB, including re-designating land to Low Density Residential, a proposed increase of the minimum density in R-2 Medium Density Residential zones from 10 to 13 homes per net acre, and incentivizing more high density housing downtown. The combination of this inaccurate initial population forecast and efficiency measures has resulted in a UGB that does not require additional residential land, even 35 years after its initial adoption.

Another concern that has been raised is that the adopted population forecast from 2009 is out of date and does not reflect recent growth data that we should be planning for. Specifically, PSU developed an updated population forecast for Eugene in 2015. The graph below shows both the adopted 2009 forecast of 214,693 in 2032, and an extrapolation of the 2015-2035 forecast, which is estimated to be about 219,319 by 2032.
This represents a difference of about 5,000 more people. Population is one of the key data that will be collected in the growth monitoring program. In addition, PSU will be providing cities with updated population forecasts every 3-4 years, which means Eugene will be back in line for another forecast in 2018-2019 while we are working on urban reserve planning (planning for beyond 20 years of growth).
The question is: How much employment is located in non-employment plan designations?

The answer is:
13% is located in Residential Plan Designations
1% is located in Parks and Open Space

This is the basis of the assumption in ECLA that 15% of new employment will locate in non-employment plan designations.

Table 1. Employment by Plan Designation, 2006

<table>
<thead>
<tr>
<th>Plan Designation</th>
<th>Employees</th>
<th>Percent of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Commercial and industrial</td>
<td>73,721</td>
<td>81%</td>
</tr>
<tr>
<td>Mixed Use</td>
<td>4,830</td>
<td>5%</td>
</tr>
<tr>
<td>Residential Plan Designations</td>
<td>11,808</td>
<td>13%</td>
</tr>
<tr>
<td>Low Density Residential</td>
<td>7,947</td>
<td>9%</td>
</tr>
<tr>
<td>Medium Density Residential</td>
<td>2,246</td>
<td>2%</td>
</tr>
<tr>
<td>High Density Residential</td>
<td>1,615</td>
<td>2%</td>
</tr>
<tr>
<td>Parks and Open Space</td>
<td>643</td>
<td>1%</td>
</tr>
</tbody>
</table>

These employees are largely city employees (e.g., employees at Hilyard Community Center)

Total: 91,002 100%

Source: Confidential Quarterly Census of Employment and Workforce

Data in green shading is employment in non-employment plan designations

The next questions are:
How much of this employment is for businesses that require land for their business, exclusive of a residence?
How much of the employment in non-employment plan designations might be from home occupations?

Some employment in residential plan designations has commercial or industrial zoning, which is likely to be for employers who require land specifically for the business - such as restaurants or vet clinics. These are the types of businesses that we'd expect to need some of in the future, whether they are located on residential plan or not. These are not likely to be home occupations.

Employment in residential plan designations and zones are the ones that are most likely to be home occupations. This employment is shown in green in Table 2.
### Table 2. Employment located in non-employment plan designations, by plan designation and zoning districts, 2006

<table>
<thead>
<tr>
<th>Plan Designation and Zoning</th>
<th>Employees</th>
<th>emp in Res PDs</th>
<th>Emp in the City</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Low Density Residential</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Commercial and industrial (C-1, C-2, GO, I-2, I-3)</td>
<td>1,237</td>
<td>10%</td>
<td>1%</td>
</tr>
<tr>
<td>Public lands and other (AG, S, etc.)</td>
<td>1,390</td>
<td>12%</td>
<td>2%</td>
</tr>
<tr>
<td>Residential (R-1 to R-4)</td>
<td>5,320</td>
<td>45%</td>
<td>6%</td>
</tr>
<tr>
<td>LDR Subtotal</td>
<td>7,947</td>
<td>67%</td>
<td>9%</td>
</tr>
<tr>
<td><strong>Medium Density Residential</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Commercial and industrial (C-1, C-2, GO, I-2, I-3)</td>
<td>469</td>
<td>4%</td>
<td>1%</td>
</tr>
<tr>
<td>Public lands and other (AG, S, etc.)</td>
<td>259</td>
<td>2%</td>
<td>0%</td>
</tr>
<tr>
<td>Residential (R-1 to R-4)</td>
<td>1,518</td>
<td>13%</td>
<td>2%</td>
</tr>
<tr>
<td>MDR Subtotal</td>
<td>2,246</td>
<td>19%</td>
<td>2%</td>
</tr>
<tr>
<td><strong>High Density Residential</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Commercial (C-1, C-2, GO)</td>
<td>371</td>
<td>3%</td>
<td>0%</td>
</tr>
<tr>
<td>Residential (R-1 to R-4)</td>
<td>1,244</td>
<td>11%</td>
<td>1%</td>
</tr>
<tr>
<td>HDR Subtotal</td>
<td>1,615</td>
<td>14%</td>
<td>2%</td>
</tr>
<tr>
<td>Residential Plan Designations</td>
<td>11,808</td>
<td>100%</td>
<td>13%</td>
</tr>
</tbody>
</table>

*Data in green shading is employment in residential plan designations and zoning districts*
The next questions are:

How much of the employment is reasonably likely to be home occupations?

Table 3 shows the distribution of employment in residential plan designation by number of employees. It seems reasonable to assume that home occupations are likely to have a few employees. Firms with more employees may be something other than home occupations. Table 3 shows:

2% of all employment in the City (2,089 employees) is located in residential PD with residential zoning and has fewer than 5 employees.

7% of employment is located in residential PD with residential zoning and has 5 or more employees.

The employers with 5 or more employees are the types of firms that locate on land that is zoned and designated for residential uses. These are the types of firms that may require land in the future. A review of the data shows that they include:

- Doctors offices or day care
- Rehabilitation centers
- Larger construction businesses, which may require storage facilities.

Some of the employers in this are accounted for in the public and semi-public land need are:

- Churches
- Schools
- Nursing homes

Table 3. Employment on land zoned and designated for residential uses by number of employees, 2006

<table>
<thead>
<tr>
<th>Employment in Res PD</th>
<th>Number</th>
<th>Percent of emp in Res PDs</th>
<th>Percent of all Emp in the City</th>
<th>Number</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>2 or fewer</td>
<td>1,024</td>
<td>13%</td>
<td>1%</td>
<td>1,301</td>
<td>68%</td>
</tr>
<tr>
<td>3 to 5</td>
<td>1,065</td>
<td>13%</td>
<td>1%</td>
<td>291</td>
<td>15%</td>
</tr>
<tr>
<td>5 or more</td>
<td>5,993</td>
<td>74%</td>
<td>7%</td>
<td>310</td>
<td>16%</td>
</tr>
<tr>
<td>Total Emp in Res PD</td>
<td>8,082</td>
<td>100%</td>
<td>9%</td>
<td>1,902</td>
<td>100%</td>
</tr>
</tbody>
</table>
Census data about people who work from home. This isn't directly comparable to the data reported above but it is another data point about changes in people working from home.

The Census reports number of people who "work from home," rather than having a travel time or travel means (e.g., car) to work.

Table 4. Employees who worked from home, Eugene

<table>
<thead>
<tr>
<th></th>
<th>1990</th>
<th>2000</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total employees</td>
<td>51,242</td>
<td>67,823</td>
<td>65,400</td>
</tr>
<tr>
<td>Worked at home</td>
<td>2,131</td>
<td>3,160</td>
<td>3,458</td>
</tr>
<tr>
<td>Percent of total employees who worked a home</td>
<td>4.0%</td>
<td>4.7%</td>
<td>5.3%</td>
</tr>
</tbody>
</table>

Note: The Census calculates employment in a different way than QCEW data, so it would not be reasonable to compare total employees in the Census to total employees in QCEW. It does seem reasonable to consider the ratio of total employees to employees who work at home, in the context of Envision Eugene.

Table 5. Percent of total employees who worked a home

<table>
<thead>
<tr>
<th></th>
<th>1990</th>
<th>2000</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>U.S.</td>
<td>3.0%</td>
<td>3.3%</td>
<td>4.3%</td>
</tr>
<tr>
<td>Oregon</td>
<td>4.3%</td>
<td>5.0%</td>
<td>6.4%</td>
</tr>
<tr>
<td>Lane County</td>
<td>4.4%</td>
<td>5.1%</td>
<td>6.5%</td>
</tr>
<tr>
<td>Eugene</td>
<td>4.0%</td>
<td>4.7%</td>
<td>5.3%</td>
</tr>
</tbody>
</table>
B.3. Share of Employment Locating in Residential Plan Designations That Will Require New Land

Share of employment locating in residential plan designation that will require new land

<table>
<thead>
<tr>
<th>Share of employment requiring residential land</th>
<th>Employment Growth Rate</th>
<th>1.4% AAGR</th>
<th>0.9% AAGR</th>
</tr>
</thead>
<tbody>
<tr>
<td>15% of Employment (ECLA Assumption)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jobs</td>
<td></td>
<td>3,758</td>
<td>2,262</td>
</tr>
<tr>
<td>Gross Acres</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LDR</td>
<td></td>
<td>58</td>
<td>35</td>
</tr>
<tr>
<td>MDR</td>
<td></td>
<td>18</td>
<td>11</td>
</tr>
<tr>
<td>HDR</td>
<td></td>
<td>13</td>
<td>8</td>
</tr>
<tr>
<td>Subtotal</td>
<td></td>
<td>89</td>
<td>54</td>
</tr>
<tr>
<td>10% of Employment (ECLA Assumption minus 5%)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jobs</td>
<td></td>
<td>2,505</td>
<td>1,507</td>
</tr>
<tr>
<td>Gross Acres</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LDR</td>
<td></td>
<td>39</td>
<td>23</td>
</tr>
<tr>
<td>MDR</td>
<td></td>
<td>12</td>
<td>7</td>
</tr>
<tr>
<td>HDR</td>
<td></td>
<td>9</td>
<td>5</td>
</tr>
<tr>
<td>Subtotal</td>
<td></td>
<td>60</td>
<td>35</td>
</tr>
<tr>
<td>8% of Employment (13% of employment minus</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jobs</td>
<td></td>
<td>2,004</td>
<td>1,207</td>
</tr>
<tr>
<td>Gross Acres</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LDR</td>
<td></td>
<td>31</td>
<td>19</td>
</tr>
<tr>
<td>MDR</td>
<td></td>
<td>10</td>
<td>6</td>
</tr>
<tr>
<td>HDR</td>
<td></td>
<td>7</td>
<td>4</td>
</tr>
<tr>
<td>Subtotal</td>
<td></td>
<td>48</td>
<td>29</td>
</tr>
</tbody>
</table>

This table is based on the finding in ECLA that 13% of employment located in residential plan designations. That 13% assumption was rounded to 15%.

Through additional analysis, we found that some employment in plan designations was: (1) commercial uses permitted in residential areas and (2) firms run from a dwelling unit (home occupations).

New commercial uses permitted in residential areas will require land in the future. Firms run from dwellings will not require additional land in the future.

The TRG asked us to report how many acres would be needed to accommodate commercial employment in residential areas. We did this for two employment forecast rates: (1) 1.4% average annual growth and (2) 0.9% average annual growth.

The 8% alternative is based on subtracting 5% of employment, which is assumed to be home occupations, from the 13% of employment that located in residential plan designations.
September 27, 2012

Mr. Jim Rue, Acting Director
Department of Land Conservation and Development
635 Capitol St. NE, Suite 150
Salem, OR 97301-2540

Re: City of Eugene; HB 3337 Compliance
    Goal 10 Buildable Lands Inventory and Clear and Objective Standards

Dear Mr. Rue:

The Home Builders Association of Lane County (HBA) has been a major stakeholder in the Envision Eugene process to establish our own UGB with a 20-year supply of land. The HBA sincerely hopes to be in a position to support the final product.

There is a one legal issue on which there is a significant difference between the city staff and the HBA, an issue that relates to the Goal 10 Buildable Land Inventory (BLI). It is an issue that deserves a navigational course correction by the city. I am hoping that the DLCD can help with this correction, thus avoiding the need for the HBA to file objections with the DLCD/LCDC at the end of the process. The HBA has spent a lot of time and resources on this process, because it wants to support the product. But it can’t support the product with the major flaw that is apparent in the current drafts.

The flaw is this: The existing acknowledged BLI, and the draft Goal 10 BLI for the Envision Eugene project includes a lot of acreage in the South Hills of Eugene, which requires review under PUD and/or subdivision standards in the code. A lot of the South Hills BLI has a slope of 20% or greater, although the total acreage has not been calculated by the City. If a landowner wants to develop under clear and objective standards, consistent with the Needed Housing Statute and the Implementing Division 8 rule, that owner faces the following standard in the Eugene Code: “There shall be no proposed grading on portions of the development site that meet or exceed 20% slope.” EC 9.8325(5)(tentative PUD); EC 9.8520(4)(tentative subdivision approval). No grading means no development.

Thus, a large part of the existing and draft BLI is prohibited from development under clear and objective standards. This is contrary to state law, which requires that the BLI be developable under clear and objective standards, consistent with the Needed Housing Statute and the Implementing Division 8 rule, that owner faces the following standard in the Eugene Code: “There shall be no proposed grading on portions of the development site that meet or exceed 20% slope.” EC 9.8325(5)(tentative PUD); EC 9.8520(4)(tentative subdivision approval). No grading means no development.

It is important to note that the 20% grading limitation is not imposed by the Eugene code for housing development proposed under the optional discretionary tracks for approval. That is, if an owner requests development approval under the optional discretionary tracks for PUD or subdivision approval (as allowed by ORS 197.307(6)) the owner can propose to grade and develop all the land regardless of slope.
But, if the owner chooses the clear and objective track to develop the same site, grading is prohibited on 20% or greater slopes.

The HBA has addressed this issue many times with Eugene staff over the last couple of years. We understand the city staff’s position to be this: Land can be counted toward the 20-year Goal 10 inventory if it can potentially be developed under the discretionary approval track (ORS 197.307(6)), even if it would be off-limits to development under the Needed Housing track because it has slopes of 20% or more.

Most recently this issue has come to a head in a Needed Housing Tentative PUD denial on a 26-acre tract in the South Hills. The owner filed under the Needed Housing track after three previous unsuccessful applications under the discretionary track between 1998 and 2006. The application was denied for violation of the 20% grading limitation. I am enclosing a copy of the Hearing Official’s recent denial of the application. Without a definition in the code of how to measure 20% slope, city staff insisted on measuring between 5-foot contour intervals. The opposing neighborhood group came up with a much different map using a different measuring method between 5-foot contours. The Hearing Official chose the neighborhood group map. Both maps are attached. Each map, which purports to show the “no grading allowed” areas in yellow (no grading means no development) shows large amounts of acreage off limits to development under the 20% slope standard. And yet these areas are being counted in the current, acknowledged BLI and in the draft HB 3337 BLI.

I would ask the DLCD to advise the city of two things required by state law:

(1) If land in the acknowledged residential BLI is developable under discretionary standards, then state law requires it to be developable under the Needed Housing standards. That is the meaning of ORS 197.307(6).

(2) Land in the acknowledged residential BLI must be developable under clear and objective standards, not precluded from development under clear and objective standards. That is required by ORS 197.307(4) and OAR 660-008-0015.

The points above reflect the statutory scheme as it has existed since 1981. After 30 years it would be good to have the City of Eugene in compliance. With a prompt, firm nudge from the DLCD I think this issue could be put to rest. It would greatly decrease the likelihood of litigation of the final Envision Eugene product.

Sincerely,

Ed McMahon, Executive Vice President
Home Builders Association of Lane County

CC:
Bob Rindy, DLCD
Rob Hallyburton, DLCD
Emily Jerome, Eugene City Attorney Office
Jon Chandler, CEO, Oregon HBA
<table>
<thead>
<tr>
<th>PLAT NAME</th>
<th>CITY OF EUGENE TENTATIVE/ FINAL APPROVAL FILE NUMBER</th>
<th>TOTAL PROJECT NUMBER OF ACRES</th>
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REVISED ON 10/14/2011 TO REFLECT CORRECTION OF DATA ON TIMBERLINE HILLS P.U.D.
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<th>UNITS PER ACRE</th>
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<td>13</td>
<td>5.08</td>
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January 28, 2013

Ed McMahon  
Home Builders Association of Lane County  
1065 River Road  
Eugene, OR 97404  

Re: City of Eugene; HB 3337 Compliance Goal 10 Buildable Lands Inventory and Clear and Objective Standards

Dear Mr. McMahon:

We received your letter of September 27, 2012 regarding the residential buildable lands inventory (BLI) currently being prepared by the city of Eugene. We would like to thank you for your participation in the Envision Eugene process, as planning only works when a wide variety of interests and viewpoints are involved. Your organization’s contributions have helped Envision Eugene’s success.

In your letter, you asked that the Department of Land Conservation and Development to advise the city of two things required by state law:

1. If land in the acknowledged residential BLI is developable under discretionary standards, then state law requires it to be developable under the needed housing standards; and

2. Land in the acknowledged residential BLI must be developable under clear and objective standards, not precluded from development under clear and objective standards.

We could quote statute and rule in this reply, but we expect you are more interested in the outcome. Let me begin by saying that you have an ally in this department in ensuring local plans and zoning codes, including Eugene’s, include an adequate supply of buildable lands, provide for needed housing, and permit residential development approvals using clear and objective standards. We pledge to work closely with the city as it considers and adopts amendments to its plan to ensure these objectives are achieved.

We read your letter to contend that, because Eugene’s code does not permit development on slopes of greater than 20 percent using clear and objective standards, all such lands must be removed from the 20-year inventory of buildable residential land in the city’s current BLI update. Our inquiry found that the city has, in its draft work product, adjusted the amount of
residential development it is calculating will be built in the area to account for unbuildable areas such as steep slopes. This is equivalent to netting out the steep slopes from the buildable lands inventory as you suggest.

It is our understanding that the factor the city used to adjust the density calculation was examined by stakeholders and found to be appropriate. This department has not made an independent assessment of the accuracy of the adjustment factor, but the method is an acceptable way to prepare a BLI. Development of a BLI requires the city to make some assumptions, but at the same time, the city’s final product must be based on reasonable evidence. We will be working with the city and stakeholders to help ensure that the final product satisfies the applicable regulations.

We appreciate your insistence that Eugene’s housing and residential land needs analyses, and plan and code more generally, result in a product that accommodates the needs of the community. The issue of clear and objective standards for needed housing is one that may not have always received adequate attention in the past, but, partly due to the efforts of your organization, this department is now giving it proper consideration.

Sincerely,

Jan Rie
Director

cc: Ed Moore, DLCD Regional Representative
    Carolyn Burke, Eugene Planning Director
    Jon Chandler, Oregon Homebuilders Association
See below and attached PDF (second page)

---

From: FARTHING Laura [mailto:Laura.Farthing@EWEB.ORG]
Sent: Wednesday, August 05, 2015 4:36 PM
To: HANSEN Alissa H
Subject: RE: PFSP Amendments for Water

Hi Alissa,

I attached a spreadsheet which took your table and made changes to the table you sent and I also made some comments. The projects that are development driven I made those 2035+.

I also attached a map of approximate locations of where the projects are. I can give you addresses in the spreadsheet if that would be more helpful than my very sophisticated and professional map (that was sarcasm).

I also attached the vacant lands map that I was able to find through LCOG. Basically anything in the hills could potentially need a major facility. The smaller areas we can serve with existing infrastructure, but the larger areas will take a considerable amount of work to serve, as has been noted. Everything in what we call our base system (from the hills to the north of the city below 500 feet) can be served by extending existing pipes. I started to circle the areas that we can serve but then realized that was kind of futile.

I will send you a copy of the master plan once I have a complete version. I am having consultant issues.

Laura

---

From: HANSEN Alissa H [mailto:Alissa.H.Hansen@ci.eugene.or.us]
Sent: Monday, August 03, 2015 8:40 AM
To: FARTHING Laura
Subject: PFSP Amendments for Water

Hi Laura-

Recognizing that you have a lot going on, I thought it would be easiest to consolidate all of my questions into one email so you only have to look in one place. And if it would be easier to discuss these in person, or over the phone, let me know.

To recap, our new UGB is intended to provide enough land for a 20 year period (which is 2012-2032). As part of the UGB adoption, we have to make findings that these lands can be served within that 20 year time frame – meaning there is either a project in the Public Facilities and Services Plan (for projects that meet the size threshold) or that the area could be served by developers.
The PFSP projects must be identified as either short term (1 to 5 years or 2016 to 2021 in this case) or long term (6 to 20 years or 2022 to 2032 in this case because the 20 year planning period for our UGB is 2012 to 2032 and we have to prove that everything can be served by 2032).

My remaining questions are shown in the comments associated with the below table (which is the PFSP table updated to include the projects you sent to me from the master plan).

Can you send me a link to the approved Water System Master Plan?

Thanks for your help with this! It is greatly appreciated.

Alissa

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<th>Project Number</th>
<th>Project Name/Description</th>
<th>Cost ($000)</th>
<th>Estimated Completion Year</th>
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<td>EWEB/Seneca 42-inch transmission line [completed]</td>
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<td>109</td>
<td>City View reservoir (800) [completed]</td>
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</tr>
<tr>
<td>110</td>
<td>Hayden Bridge Expansion and 10mg Reservoir and pump gallery [completed]</td>
<td>21,100</td>
<td>2003</td>
</tr>
<tr>
<td>111</td>
<td>Hawkins Hill reservoir seismic upgrades</td>
<td>1,927</td>
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</tr>
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<td>112</td>
<td>Willamette reservoir (800) replacement</td>
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<td>113</td>
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<td>Willamette pump station (975)</td>
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<td>Crenshaw pump station (800)</td>
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<td>Hawkins View pump station (1150)</td>
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<td>Crest pump station (1150) replacement</td>
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<td>Construct 2,000 feet of 24-inch pipeline along Franklin Blvd to new treatment plant site</td>
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<td>Hayden Bridge former fish hatchery intake modifications [replaced by project 238]</td>
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<td>Laurel Hill reservoir and pump station (975)</td>
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<td>Laurel Hill pump station (1150)</td>
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<td>Shasta reservoir (1150) [replaced by project 113]</td>
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<td>Dillard reservoir (975) and pump station (1150)</td>
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<td>Dillard reservoir (1150)</td>
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<td>Elliot reservoir (607) [replaced by project 243]</td>
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<td>Gimple Hill reservoir (975) and pump station</td>
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<td>Green Hill reservoir (800)</td>
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### B.7. Water Review Employment and Residential Land Supply

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<td>Green Hill pump station (975)</td>
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<td>Westside/Cantrell Hill reservoir (607) [replaced by project 244]</td>
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<td>Westside Transmission Main [completed]</td>
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<td>237</td>
<td>Glenwood/LCC Basin intertie</td>
<td>500</td>
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<td>238</td>
<td>Alternative Water Source</td>
<td>68,000</td>
<td>2022</td>
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<td>239</td>
<td>Alternative Water Source Location 5MG reservoir</td>
<td>9,370</td>
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<td>Santa Clara pump station and 5 MG reservoir at the existing Santa Clara pump station and reservoir site.</td>
<td>12,442</td>
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<td>241</td>
<td>College Hill 5 MG reservoir and decommission existing College Hill 15 MG reservoir</td>
<td>9,370</td>
<td>2028</td>
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<td>242</td>
<td>Construct 10,000 feet of 36-inch pipeline in 23rd Avenue and Alder Street</td>
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<td>243</td>
<td>Elliott 5 MG reservoir [to replace project 226]</td>
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<td>244</td>
<td>5 MG Reservoir at either the Santa Clara site, Elliott site, or Oak Hill/Cantrell Rd site</td>
<td>9,370</td>
<td>2033</td>
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</tbody>
</table>

**Alissa Hansen | Planning Division**
City of Eugene | Planning & Development
99 West 10th Avenue | Eugene Oregon 97401
Phone 541.682.5508 | Fax 541.682.5572

Messages to and from this e-mail address may be available to the public under Oregon Public Records Law
Eugene Comprehensive Lands Assessment
Pre-policy Analysis

Prepared for
City of Eugene Planning and Development Department

Project consultants:
ECONorthwest
Lane Council of Governments
The Ulum Group
Winterbrook Planning

Primary authors:
Terry Moore, Principal and Planning Director
Bob Parker, Director and Senior Planner
Beth Goodman, Planner

June 2010
Disclaimer

ECONorthwest completed this project under contract to the City of Eugene to conduct the Eugene Comprehensive Lands Assessment (ECLA). The content and timing of ECLA was determined, in part, by Oregon House Bill 3337, which required Eugene to establish its own Urban Growth Boundary (UGB) separate from the joint metropolitan UGB that Springfield and Eugene has shared for about 25 years.

The City of Eugene asked ECO to develop an analysis that complies with state requirements for LCDC Goals 9, 10, and 14: a Buildable Lands Inventory (BLI), an Economic Opportunity Analysis (EOA), and a Housing Needs Analysis (HNA). The purpose of ECLA is to develop a pre-policy assessment of land sufficiency to accommodate 20-years of growth in Eugene. A subsequent project, Envision Eugene, will consider policy changes that may affect Eugene’s land sufficiency and require changes to development policies.

Throughout the report we have identified our sources of information and assumptions used in the analysis. Within the limitations imposed by uncertainty and the project budget, ECO and the City of Eugene have made every effort to check the reasonableness of the data and assumptions and to test the sensitivity of the results of our analysis to changes in key assumptions. ECO and the City of Eugene acknowledge that any forecast of the future is uncertain. The fact that we evaluate assumptions as reasonable does not guarantee that those assumptions will prevail.

We have also described our analytic techniques and their limitations. The City of Eugene has reviewed our analysis for reasonableness.

This project is partially funded by a Department of Land Conservation and Development Technical Assistance Grant.
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Section 1 EXECUTIVE SUMMARY

This report summarizes the Eugene Comprehensive Land Assessment (ECLA) of the sufficiency of land within Eugene’s Urban Growth Boundary (UGB). State law requires that Oregon cities have a UGB with enough land to accommodate population and employment growth for a 20-year planning period. In 2007, the Oregon Legislature passed House Bill 3337 which directed Eugene and Springfield to establish separate Urban Growth Boundaries (UGBs).

This report concludes that Eugene has an approximately 1,400 acre deficit of residential land and nearly 400 acre deficit of employment land under baseline conditions. Based on this analysis, the City will now need to evaluate policies that increase the capacity of land inside the existing UGB (e.g., by increasing density), add land to the UGB, or both. That evaluation, called Envision Eugene, has started and will continue throughout 2010.

Table S-1 shows a summary of the land deficit identified under the baseline conditions. It shows that Eugene has a deficit of:

- 1,410 gross acres of residential land, with nearly 90% of the deficit in the Low Density Residential plan designation
- 388 acres of commercial land
- No industrial land deficit under the assumptions used in this analysis without a further discussion of Eugene’s economic development goals, as discussed in Section 4.2

Table S-1. Summary of land deficit, Eugene UGB, 2011-2031

<table>
<thead>
<tr>
<th>Plan Designation</th>
<th>Needed Land (Gross Acres)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Residential</td>
<td>1,410</td>
</tr>
<tr>
<td>Low Density Residential</td>
<td>1,244</td>
</tr>
<tr>
<td>Medium Density Residential</td>
<td>72</td>
</tr>
<tr>
<td>High Density Residential</td>
<td>94</td>
</tr>
<tr>
<td>Commercial</td>
<td>388</td>
</tr>
<tr>
<td>Industrial</td>
<td>---</td>
</tr>
</tbody>
</table>

Source: ECONorthwest
Section 2 INTRODUCTION

This report summarizes the Eugene Comprehensive Land Assessment (ECLA) of the sufficiency of land within Eugene’s Urban Growth Boundary (UGB). State law requires that Oregon cities have a UGB with enough land to accommodate population and employment growth for a 20-year planning period. In 2007, the Oregon Legislature passed House Bill 3337 which directed Eugene and Springfield to establish separate Urban Growth Boundaries (UGBs).

This report addresses the requirements of HB 3337 in the context of other state requirements for a UGB evaluation including a Buildable Lands Inventory (BLI), an Economic Opportunity Analysis (EOA), and a Housing Needs Analysis (HNA). The information provided by these and related products supports estimates of (1) the need for buildable land (to accommodate employment and population growth), and (2) the amount of existing buildable land within the Eugene portion of the existing metropolitan UGB. A comparison of those estimates is the basis for determining whether Eugene has enough land to accommodate Eugene’s expected growth over the 20-year planning period.

Using assumptions documented in technical appendices of this summary, the analysis concludes that Eugene has an approximately 1,400 acre deficit of residential land and nearly 400 acre deficit of commercial land under baseline conditions. Based on this analysis, the next step is for the City to evaluate policies that expand the capacity of land inside the existing UGB (e.g., by increasing density), add land to the UGB, or both. That evaluation, called Envision Eugene, has started and will continue throughout 2010.

2.1 BACKGROUND

The Metropolitan Area General Plan is the comprehensive plan that has guided growth in Eugene and Springfield since 1982. The Metro Plan has been amended several times since 1982; most changes have been small. A comprehensive update began in 1994. In 2004 the Plan was updated to incorporate policies from various earlier plans, such as the west Eugene Wetlands Plan and neighborhood refinement plans, and to incorporate the Eugene Growth Management Policies, which were adopted in 1998 and summarized policies found in other plans. These policies are generally considered the fundamental ones directing Eugene’s actions regarding the management of urban growth and development.

In 2007, the Oregon Legislature passed House Bill 3337, directing Eugene and Springfield to establish separate Urban Growth Boundaries (UGBs) and to “demonstrate, as required by ORS 197.296, that its comprehensive
plan provides sufficient buildable lands within an urban growth boundary established pursuant to statewide planning goals to accommodate estimated housing needs for 20 years.\footnote{House Bill 3337 was codified in ORS 197.304. Emphasis added.} The Eugene City Council directed staff to look not just at residential land (housing needs), but at employment and public land needs as well.

Given the specific requirements of HB 3337 and the time it had to meet those requirements, City staff decided to limit this project to collecting data and making extrapolations of land need based on existing policy and on and recent trends. That means, importantly, that this project is not about researching, recommending, or adopting new policies that could change those trends. The evaluation and adoption of such policies will happen after this project is completed.

Thus, the scope of work for ECLA is, by design, only part of a full UGB evaluation. It does not work back and forth between estimates of land need, new policies that might change land need (e.g., policies to increase density), and new estimates of land need. Rather, it aims at making a determination of whether recent trends in growth and the type of land development that accommodates that growth (or divergences from those trends based on reasonable expectations about changes in market conditions) would result, over 20 years, in an amount of buildable land consumption that is equal to or less than the amount of buildable land estimated to be in the existing UGB now.
2.2 **Organization of this Report**

This report has three additional sections, and is supported by nine appendices that provide technical details:

- **Section 2. Framework for Determining Land Need**
- **Section 3. Results of the Assessment**
- **Section 4. Policy Implications**
- **Appendix A: Buildable Land inventory**
- **Appendix B: Employment land need (Economic Opportunities Analysis)**
- **Appendix C: Residential land need (Housing Needs Analysis)**
- **Appendix D: Public and semi-public land needs**
- **Appendix E: Glossary**
- **Appendix F: Acknowledgements**
- **Appendix G: Technical Memoranda**
Section 3 Framework for Determining Land Supply and Need

For thirty-five years the basic goals of the Oregon land-use program have been interpreted and refined by new statute, administrative rules, and court cases. A local government is not at liberty to adopt whatever method it chooses (no matter how logical) to make a determination about whether it has sufficient land in its boundary to accommodate growth. Rather, it must comply with specific requirements—about data, assumptions, and methods of analysis—that have evolved over decades.

Those requirements are extensive. It is essential that any analysis comply with them. This chapter summarizes the most important of those requirements in a way that illustrates their logic: what it refers to as a framework for determining land supply and need. This section is a summary only: some of the technical appendices contain more extensive descriptions of various components of the evaluation framework.

3.1 The Basic Relationships

Evaluation of land needs inside a UGB is based on the following assumptions about some basic relationships:

- If population and employment are expected to grow, they will need built space (e.g., houses, offices, stores, factories, warehouses) to accommodate them.
- Unless the amount of growth is small and current vacancy rates are high, some new built space will need to be constructed.
- For new buildings to get constructed they require as inputs, among other things, land that can be physically, economically, and legally be built on.
- Historically, the majority of new buildings are built on vacant land that is not too constrained by physical characteristics (e.g., steep slopes) or public policy (e.g., restrictions on building in flood plains or wetlands). But new buildings can also be built on land that was previously developed (i.e., redevelopment). Redevelopment accommodates the expected population and employment growth only to the extent that it is denser than the existing development it displaces.
The assessments that the state planning process requires derive directly from these relationships, and are intended to answer the following questions:

- **What is the demand / need for land?** The analysis addressing this question gets broken down into *residential* land (Goal 10, Housing: Housing Needs Analysis), *employment* land (Goal 9, The Economy: Economic Opportunities Analysis), and *other* land (primary public land for parks and other public purposes). The standard steps for the assessment:
  - Estimate growth in population and households and convert to an estimate of land need by making reasonable and documented assumptions about factors like persons per household, the composition of new housing supply by type (i.e., the housing mix), and the average *density* at which different housing types will be built.
  - Develop a statement of economic development objectives that articulates the City’s economic development goals and aspirations. Based on this statement, identify the types of industries that meet the City’s goals and aspirations and describe the characteristics of land needed by these industries (e.g., site size, location, proximity to transportation, etc.). Estimate land needs based on the site needs of these industries, as well as the estimated growth in employment and the average amount of land needed to accommodate this employment.

- **What is the amount of residential, commercial (office and retail), and industrial vacant, buildable land available to accommodate expected population and employment growth?** In larger cities like Eugene, that analysis is done using GIS information about land characteristics and making assumptions about types and levels of those characteristics that make land vacant and buildable or not.

- **How much will redevelopment of land now developed reduce the need for vacant, buildable land to accommodate expected growth?** That question is addressed by estimating either (1) how much growth will be accommodated via redevelopment and, hence, will not require buildable land, or (2) how much developed land is redevelopable in the 20-year planning period so that it may be added to the supply of buildable land.

- **What does the comparison of the estimate of land need (demand) to the estimate of land supply suggest about whether the existing UGB has enough buildable land to accommodate 20 years of expected growth?**
At this level of description, the assessment process is relatively clear and logical. But there are many details required by statute, administrative rule, and court rulings that make the process complex. There is not space in this summary to go through all the details of the full assessment. Technical appendices provide those details (about the evaluation framework, assumptions, data, and analysis methods) for the three main drivers of urban land use: need for housing, employment, and public and semi-public uses.
Section 4 RESULTS OF THE ASSESSMENT

This section presents a pre-policy summary of the results of the ECLA baseline analysis of land sufficiency within the UGB. The baseline analysis is based on recent development trends and information about Eugene’s current development patterns. The assumptions used to develop the baseline analysis assume that Eugene’s future development will be similar to past and current development.

The purpose of developing a baseline analysis was to provide an estimate of land sufficiency as the basis for policy discussions about how land may develop in the future. Eugene’s future development patterns may be substantially different from past development patterns. The discussion of how Eugene should develop in the future will occur during the Envision Eugene project, which will model possible future development patterns based on changes in market dynamics and/or changes in development policies. Envision Eugene will focus on discussions about land use efficiency measures (e.g., increasing densities or increasing redevelopment), economic development policies, and other land use issues.

This section includes five subsections: (1) results of the buildable lands inventory, (2) estimate of demand for employment land, (3) estimate of demand for residential land, (4) estimate of need for public and semi-public land, and (5) a comparison of the supply of land with the demand for land.
4.1 BUILDABLE LAND INVENTORY

The ECLA Buildable Lands Inventory (BLI) classifies all land within the Eugene UGB to determine the amount of vacant developable land that may be available for development over the 20 year planning period. The buildable land inventory is based on numerous datasets maintained by the Lane Council of Governments, City of Eugene, and many others, as well as data acquired from contractors or other external sources, such as the state or federal government. Appendix A documents the full list of data sets used to develop the inventory of buildable land.

All lands in the Eugene UGB were categorized into mutually exclusive categories. Table 1 shows the four categories of land: (1) committed, (2) protected, (3) developed, and (4) developable. Table 1 shows that Eugene’s UGB has 34,446 acres, about 8% of which (2,758 acres) was classified as buildable developable land, which is vacant. The majority of developable land was in residential plan designations (1,679 acres) or in industrial designations (924 acres).

Table 1. Acres by Plan Designation and Development Status, Eugene UGB, 2008

<table>
<thead>
<tr>
<th>Plan Designation</th>
<th>Non-Buildable Land</th>
<th>Buildable Land</th>
<th>All Land</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Committed</td>
<td>Protected</td>
<td>Developable</td>
</tr>
<tr>
<td>Commercial</td>
<td>662</td>
<td>113</td>
<td>88</td>
</tr>
<tr>
<td>Commercial</td>
<td>532</td>
<td>82</td>
<td>84</td>
</tr>
<tr>
<td>Major Retail Center</td>
<td>131</td>
<td>30</td>
<td>4</td>
</tr>
<tr>
<td>Industrial</td>
<td>1,913</td>
<td>273</td>
<td>924</td>
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<tr>
<td>Light Medium Industrial</td>
<td>897</td>
<td>91</td>
<td>393</td>
</tr>
<tr>
<td>Heavy Industrial</td>
<td>646</td>
<td>18</td>
<td>174</td>
</tr>
<tr>
<td>Special Heavy Industrial</td>
<td>21</td>
<td>5</td>
<td>195</td>
</tr>
<tr>
<td>Campus Industrial</td>
<td>349</td>
<td>159</td>
<td>162</td>
</tr>
<tr>
<td>Residential</td>
<td>5,989</td>
<td>845</td>
<td>1,679</td>
</tr>
<tr>
<td>Low Density Residential</td>
<td>5,334</td>
<td>669</td>
<td>1,432</td>
</tr>
<tr>
<td>Medium Density Residential</td>
<td>440</td>
<td>109</td>
<td>180</td>
</tr>
<tr>
<td>High Density Residential</td>
<td>216</td>
<td>67</td>
<td>67</td>
</tr>
<tr>
<td>Government and Education</td>
<td>816</td>
<td>6</td>
<td>-</td>
</tr>
<tr>
<td>Mixed Use</td>
<td>131</td>
<td>12</td>
<td>10</td>
</tr>
<tr>
<td>Other</td>
<td>2,488</td>
<td>291</td>
<td>56</td>
</tr>
<tr>
<td>Total</td>
<td>11,999</td>
<td>1,539</td>
<td>2,758</td>
</tr>
</tbody>
</table>

Source: LCOG Buildable Lands Inventory
Note: Totals may be off slightly as a result of rounding.
4.2 EMPLOYMENT LAND DEMAND

The purpose of an economic opportunities analysis (EOA) is to determine if there is enough land inside the City’s UGB to support economic growth over a 20-year planning period. To make this determination, the City must assess how much and what types of economic growth may occur in Eugene.

This section provides a baseline estimate of employment land needs based on assumptions about the amount of employment growth that will require new land, employment densities, and land need by site size. This section provides a demand-based approach to estimating employment land needs, which projects employment land need based predominantly on the forecast of employment growth, using recent employment densities (e.g., the number of employees per acre) to estimate future commercial and industrial land demand.

Goal 9 requires cities to state objectives for economic development (OAR 660-009-0020(1)(a)) and to identify the characteristics of sites needed to accommodate industrial and other employment uses to implement the economic development objectives (OAR 660-009-0025(1)). The City of Eugene has not stated objectives for economic development, making it very difficult to identify the characteristics of sites needed to implement the economic development objectives. When Eugene decisionmakers develop this statement of economic development objectives, the analysis of commercial and industrial land demand may change, possibly substantially, to implement the economic development objectives and the potential for larger site needs.

Table 2 presents a baseline estimate of employment growth, employment density, and employment land demand within the Eugene UGB for the 2011 to 2031 period. Table 2 is based on the following assumptions:

- **Employment growth.** Eugene will have about 116,959 covered employees in 2011 and employment will grow at an average annual rate of 1.4%. By 2031, Eugene’s employment base will have grown to 154,136 employees, an increase of 37,177 employees. **Industrial, commercial, and retail employment will grow by 31,816 employees over the 20 year period.** Demand for land based on government employment is accounted for in the analysis of need for public and semi-public land.

- **Employment not requiring vacant land.** Some employment will locate on land that is already developed. Table 2 assumes that: (1) about 15% of commercial and retail employment will locate in non-employment plan designations, mostly in residential plan
designations; (2) about 10% of new employment will locate in existing built space; (3) about 17% of employment growth will be accommodated through redevelopment, with the largest amount of redevelopment in retail employment and the smallest share of redevelopment in industrial employment. All told, about 39% of employment growth in Eugene, 12,348 employees, will not require vacant employment land.

- **Employment requiring vacant land.** About 19,468 employees will require vacant land over the planning period.

- **Employment densities.** Table 2 assumes that employment densities will be similar to current employment densities: 13 employees per acre (EPA) for industrial land uses, 68 EPA commercial land uses, and 23 EPA for retail.

- **Gross acres of employment land.** Employment growth will result in demand for 679 net acres of land, which does not account for land needed for public rights-of-way. Analysis of current development patterns shows that industrial land has a net-to-gross conversion factor of 15% and commercial land has a conversion factor of 20%.

Based on these assumptions, Eugene will need 818 gross acres of industrial, commercial, and retail land to accommodate employment growth over the 20-year planning period.

Table 2. Baseline estimate of employment growth, employment density, and employment land demand, Eugene UGB, 2011 to 2031

<table>
<thead>
<tr>
<th>Land Use Type</th>
<th>New Employment</th>
<th>Emp. Growth not Requiring New Emp. Land</th>
<th>Employment on New Land</th>
<th>EPA (Net Acres)</th>
<th>Land Demand (Net Acres)</th>
<th>Land Demand (Gross Acres)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Industrial</td>
<td>6,762</td>
<td>1,352</td>
<td>5,410</td>
<td>13</td>
<td>416</td>
<td>490</td>
</tr>
<tr>
<td>Commercial</td>
<td>20,180</td>
<td>8,072</td>
<td>12,108</td>
<td>68</td>
<td>178</td>
<td>223</td>
</tr>
<tr>
<td>Retail</td>
<td>4,874</td>
<td>2,924</td>
<td>1,950</td>
<td>23</td>
<td>85</td>
<td>106</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>31,816</strong></td>
<td><strong>12,348</strong></td>
<td><strong>19,468</strong></td>
<td><strong>29</strong></td>
<td><strong>679</strong></td>
<td><strong>818</strong></td>
</tr>
</tbody>
</table>

Source: ECONorthwest
Note: Land need for government uses is accounted for in the analysis of public and semi-public land needs
Note: Totals may be off slightly as a result of rounding.

Table 3 shows the baseline estimate of employment land sufficiency and summarizes the three parts of determining employment land sufficiency:

- **Employment land demand.** The demand for employment land is based on the employment forecast presented in Table 2. Table 2 shows that Eugene will need a total of 490 gross acres of land.
for industrial uses and 329 gross acres of land for commercial and retail uses. The following assumptions were used to develop the land need shown in Table 3:

- **Future distribution of employment land by site size will be similar to the current distribution of land by site size.** The buildable lands inventory shows that more than one-third of employment is located on sites smaller than five acres and more than one-quarter of employment land is located in sites larger than 25 acres. The analysis in Table 3 assumes that the current distribution of employment land by site size will continue into the future. For example, Table 3 shows that about one-third of needed industrial land will be on sites smaller than 5 acres (179 acres of the 490 acres of industrial land demand), consistent with the current distribution of employment land by site size.

- **The average size of sites will be similar to the current average site size.** Goal 9 requires that an estimate of the number of sites needed by land use type and site size. Table 3 assumes that the average size of sites will remain the same throughout the planning period. For example, the average size of industrial sites between 5 to 10 acres in size is 7 acres. Table 3 assumes that this average will remain consistent over the planning period.

- **Employment land supply.** The supply of employment land shown in Table 3 is based on the buildable land inventory of vacant developable by site size, shown in detail in Appendix B. For example, Table 1 shows that Eugene has a total of 924 acres of industrial land, as does Table 3.

- **Employment land sufficiency.** Table 3 shows whether Eugene has a surplus or deficit of employment land by site size by comparing the demand for land with the supply of land. For example, Table 3 shows that Eugene has a deficit of 118 commercial sites smaller than 5 acres. This result was arrived at by subtracting the demand for commercial land on sites smaller than 5 acres (201 acres) from the supply of commercial land on sites smaller than 5 acres (83 acres). The sufficiency of sites was arrived at by the same method (i.e., demand for 559 commercial sites smaller than 5 acres minus the supply of 198 commercial sites smaller than 5 acres equals a deficit of 361 sites).
Table 3 shows that Eugene has a deficit of commercial and retail sites in all sizes smaller than 50 acres, for a total deficit of 230 gross acres on 371 sites. Eugene has about 434 acres of industrial land, on 39 sites, in excess of the demand for industrial land. The industrial land supply includes one 195 acre site owned by the Metropolitan Wastewater Management Commission (MWMC). This site is located along Highway 99 at the edge of Eugene’s UGB, is currently used for wastewater reclamation, and about 75% of the site is in wetlands. The potential employment uses on this site are limited to uses that are compatible with these limitations. MWMC is currently in negotiations with a potential lessee which could result in a change in use at this site, potentially impacting the status of this site in the BLI.

Table 3. Baseline estimate of employment land demand, employment land supply, and employment land sufficiency, Eugene UGB, 2011 to 2031

<table>
<thead>
<tr>
<th>Land Use Type by Broad Plan Designation Categories</th>
<th>Site size (gross acres)</th>
<th>Total (gross acres)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Less than 5</td>
<td>5 to 10</td>
</tr>
<tr>
<td>Land Demand</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Land (gross acres)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Industrial</td>
<td>179</td>
<td>93</td>
</tr>
<tr>
<td>Commercial (including Retail)</td>
<td>201</td>
<td>38</td>
</tr>
<tr>
<td>Number of Sites</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Industrial</td>
<td>224</td>
<td>14</td>
</tr>
<tr>
<td>Commercial (including Retail)</td>
<td>559</td>
<td>6</td>
</tr>
<tr>
<td>Land Supply</td>
<td></td>
<td></td>
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<tr>
<td>Land (gross acres)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Industrial</td>
<td>256</td>
<td>160</td>
</tr>
<tr>
<td>Commercial (including Mixed Use)</td>
<td>83</td>
<td>16</td>
</tr>
<tr>
<td>Number of Sites</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Industrial</td>
<td>248</td>
<td>24</td>
</tr>
<tr>
<td>Commercial (including Mixed Use)</td>
<td>198</td>
<td>2</td>
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<td>Land Surplus (Deficit)</td>
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<tr>
<td>Land (gross acres)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Industrial</td>
<td>77</td>
<td>67</td>
</tr>
<tr>
<td>Commercial (including Retail)</td>
<td>(118)</td>
<td>(22)</td>
</tr>
<tr>
<td>Number of Sites</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Industrial</td>
<td>24</td>
<td>10</td>
</tr>
<tr>
<td>Commercial (including Retail)</td>
<td>(361)</td>
<td>(4)</td>
</tr>
</tbody>
</table>

Source: ECONorthwest
Note: Totals may be off slightly as a result of rounding.

The baseline estimate of employment land sufficiency was developed using a demand-based approach to estimating employment land needs, which projects employment land need based predominantly on the forecast of employment growth, using recent employment densities (e.g., the number of employees per acre) to estimate future commercial and industrial land demand. Goal 9 requires that cities consider their objectives for economic development when developing an estimate of employment land need. The City of Eugene has not stated objectives for
economic development as required by Goal 9, making it very difficult to identify the characteristics of sites needed to implement the economic development objectives. **When Eugene decisionmakers develop this statement of economic development objectives (required by Goal 9), the analysis of commercial and industrial land demand may change, possibly substantially, to implement the economic development objectives.**
4.3 RESIDENTIAL LAND DEMAND

House Bill 3337 requires that the City of Eugene establish an urban growth boundary (UGB) and demonstrate that there is enough land within the UGB to accommodate estimated housing needs for 20 years. This section presents a baseline housing needs analysis that makes this determination, consistent with requirements of Goal 14, ORS 197.296, and OAR 660-008. The methods used for this study generally follow the Planning for Residential Growth guidebook, published by the Oregon Transportation and Growth Management Program (1996).

The first step in a housing needs analysis to project the number of new housing units needed during the planning period. Table 4 shows an estimate of new housing in Eugene for the 2011 to 2031 period, based on historical data. The projection is based on the following assumptions:

- Population will increase by 33,900 people from 2011 to 2031, as forecast in Lane County’s adopted population forecast.
- About 5.5% percent of the new population or 1,865 people will locate in group quarters, based on the share of population in group quarters from the 2007 Census and the assumption that the share of population in group quarters will not change.
- The average household size will continue to be 2.25 people per household, based on information from the 2007 Census, a “safe harbor” assumption established in OAR 660-024-0040(8)(a).
- Vacancy rates for all housing types will be 5.0% based on recent vacancy rates in Eugene.
- The mix of housing is 61% single-family housing types and 39% attached housing types. The housing mix is based on long-term trends in the mix of Eugene’s housing. The mix of 61%/39% is based on the mix of housing in Eugene in 2007.

Based on the assumptions shown in Table 4, Eugene will need 14,951 new dwelling units to accommodate population growth between 2011 and 2031, not including new group quarters. The baseline forecast of demand for new housing units may change as the City considers policy options to accommodate growth within the existing UGB, through the Envision Eugene project.
Table 4. Baseline forecast of demand for new housing units, Eugene UGB, 2011-2031

<table>
<thead>
<tr>
<th>Variable</th>
<th>Estimate of Housing Units (2011-2031)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change in persons</td>
<td>33,900</td>
</tr>
<tr>
<td>[\text{minus} \quad \text{Change in persons in group quarters}]</td>
<td>1,865</td>
</tr>
<tr>
<td>[\text{equals} \quad \text{Persons in households}]</td>
<td>32,036</td>
</tr>
<tr>
<td>Average household size</td>
<td>2.25</td>
</tr>
<tr>
<td>New occupied DU</td>
<td>14,239</td>
</tr>
<tr>
<td>[\text{times} \quad \text{Aggregate vacancy rate}]</td>
<td>5%</td>
</tr>
<tr>
<td>[\text{equals} \quad \text{Vacant dwelling units}]</td>
<td>712</td>
</tr>
<tr>
<td><strong>Total new dwelling units (2011-2031)</strong></td>
<td>14,951</td>
</tr>
<tr>
<td>Dwelling units by structure type</td>
<td></td>
</tr>
<tr>
<td>Single-family detached</td>
<td></td>
</tr>
<tr>
<td>[\text{Percent single-family detached DU}]</td>
<td>61%</td>
</tr>
<tr>
<td>[\text{equals} \quad \text{Total new single-family DU}]</td>
<td>9,120</td>
</tr>
<tr>
<td>Single-family attached</td>
<td></td>
</tr>
<tr>
<td>[\text{Percent single-family attached DU}]</td>
<td>7%</td>
</tr>
<tr>
<td>[\text{Total new single-family attached DU}]</td>
<td>1,047</td>
</tr>
<tr>
<td>Two to four units</td>
<td></td>
</tr>
<tr>
<td>[\text{Percent apartment DU}]</td>
<td>10%</td>
</tr>
<tr>
<td>[\text{Total new two to four DU}]</td>
<td>1,495</td>
</tr>
<tr>
<td>Five or more units</td>
<td></td>
</tr>
<tr>
<td>[\text{Percent apartment DU}]</td>
<td>22%</td>
</tr>
<tr>
<td>[\text{Total new five or more DU}]</td>
<td>3,289</td>
</tr>
<tr>
<td><strong>Totals</strong></td>
<td></td>
</tr>
<tr>
<td>[\text{equals} \quad \text{Total new dwelling units (2011-2031)}]</td>
<td>14,951</td>
</tr>
<tr>
<td>Dwelling units needed annually</td>
<td>748</td>
</tr>
</tbody>
</table>

Source: Calculations by ECONorthwest based on Eugene’s adopted population forecast and US Census data.
Note: Totals may be off slightly as a result of rounding.

Some of the 14,951 dwelling units shown in Table 4 will not require new land because they will locate on land that is currently developed. Redevelopment over the 2001 to 2008 period was about 8% of new dwellings built during that period (527 of the new 6,532 dwelling units built over the eight year period).

The baseline forecast assumes that the redevelopment rate will be the same as the recent rate and will remain stable over the 20 year planning period. The result of this assumption is that 1,197 dwellings will locate

---

2 For the purposes of ECLA, residential redevelopment is development that occurs on land with existing development, where the new development results in an increase in housing capacity. In this analysis, redevelopment does not include dwellings that will be demolished and replaced on a one-for-one basis because these dwellings are replaced at the same site and do not increase the capacity of existing residential land.
on land with existing development and that Eugene will need to provide land for 13,754 new dwelling units.

Table 5 shows the forecast of new housing units in Eugene for the period 2011 to 2031, using baseline assumptions. The baseline forecast of new housing units uses the assumptions about housing mix and redevelopment discussed above, as well as the following assumptions, based on recent data:

- **Residential density** will be the same as achieved densities over the 2001 to 2008 period: 5.4 dwelling per net acre single-family detached, 20.2 dwelling per net acre single-family attached, 8.6 dwelling per net acre for structures with two to four units, and 24.1 dwelling per net acre for structures with five or more units.

- **The net to gross factor**, which converts from net acres to gross acres, will be 22% based on the average amount of land used for public right-of-ways, infrastructure, and other public uses in residential development during the 2001 to 2008 period.

Table 5 shows the baseline forecast assumes an average density of 7.3 dwelling units per net acre (about 5.7 dwelling units per gross acre). Based on the mix and density assumptions, Eugene will need about 2,420 gross residential acres to accommodate new housing between 2011 and 2031.

### Table 5. Baseline forecast of new housing by type and density, Eugene UGB, 2011-2031

<table>
<thead>
<tr>
<th>Housing Type</th>
<th>DU Requiring New Residential Land</th>
<th>Percent</th>
<th>Net Acres</th>
<th>Net Res. Acres</th>
<th>Net to Gross Factor</th>
<th>Gross Acres</th>
<th>Density (DU/gross res ac)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single-family detached</td>
<td>8,390</td>
<td>61%</td>
<td>5.4</td>
<td>1,554</td>
<td>22%</td>
<td>1,992</td>
<td>4.2</td>
</tr>
<tr>
<td>Single-family attached</td>
<td>963</td>
<td>7%</td>
<td>20.2</td>
<td>48</td>
<td>22%</td>
<td>62</td>
<td>15.5</td>
</tr>
<tr>
<td>Two to four units</td>
<td>1,375</td>
<td>10%</td>
<td>8.6</td>
<td>159</td>
<td>22%</td>
<td>204</td>
<td>6.7</td>
</tr>
<tr>
<td>Five or more units</td>
<td>3,026</td>
<td>22%</td>
<td>24.1</td>
<td>126</td>
<td>22%</td>
<td>162</td>
<td>18.7</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>13,754</strong></td>
<td><strong>100%</strong></td>
<td><strong>7.3</strong></td>
<td><strong>1,887</strong></td>
<td></td>
<td><strong>2,420</strong></td>
<td><strong>5.7</strong></td>
</tr>
</tbody>
</table>

Source: ECONorthwest

Note: Green shading denotes assumptions based on residential development during the 2001 to 2008 period

Note: Totals may be off slightly as a result of rounding.

Table 6 provides an allocation of housing units by Eugene’s three residential plan designations and commercial plan designations. Dwelling units were allocated to plan designations based, in part, on recent development trends within each plan designation and on the type of development allowed in each plan destination. Table 6 also provides an estimate of the gross acres required in each designation to accommodate new housing units for the 2011-2031 period. The acreages are based on the gross density assumptions shown in Table 5.
Based on the housing needs analysis, dwellings have been allocated by plan designation and type:

- Sixty-three percent of new dwelling units will locate in the Low Density Residential designation, which allows single-family detached, accessory dwelling units, and manufactured homes. This designation also allows duplex, single-family attached, and some multifamily dwellings.

- Seventeen percent of new dwellings will locate in the Medium Density Residential designation, which allows single-family detached, single-family attached, manufactured home parks, townhomes, duplexes, and multifamily dwellings.

- Fifteen percent of new dwelling units will locate in High Density Residential or Mixed-Use designations, which allow single-family detached, townhomes, manufactured (single detached and manufactured home parks), duplexes, and multifamily.

- Five percent of new dwelling units will locate in commercial plan designations. These units will generally occur in mixed-use developments and in nodal areas.

Table 6. Allocation of new housing units by plan designation, Eugene UGB, 2011-2031

<table>
<thead>
<tr>
<th>Housing Type</th>
<th>Low Density Residential</th>
<th>Medium Density Residential</th>
<th>High Density Residential</th>
<th>Commercial Designations</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>DU</td>
<td>Gross Ac</td>
<td>DU</td>
<td>Gross Ac</td>
<td>DU</td>
</tr>
<tr>
<td>Single-family detached</td>
<td>8,129</td>
<td>1,966</td>
<td>261</td>
<td>26</td>
<td>0</td>
</tr>
<tr>
<td>Single-family attached</td>
<td>165</td>
<td>6</td>
<td>454</td>
<td>35</td>
<td>172</td>
</tr>
<tr>
<td>Two to four units</td>
<td>378</td>
<td>97</td>
<td>756</td>
<td>89</td>
<td>138</td>
</tr>
<tr>
<td>Five or more units</td>
<td>0</td>
<td>0</td>
<td>908</td>
<td>76</td>
<td>1,705</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>8,672</strong></td>
<td><strong>2,069</strong></td>
<td><strong>2,379</strong></td>
<td><strong>226</strong></td>
<td><strong>2,015</strong></td>
</tr>
<tr>
<td>Net density (du per acre)</td>
<td>5.4</td>
<td>13.5</td>
<td>31.6</td>
<td>20.8</td>
<td>7.3</td>
</tr>
<tr>
<td>Gross density (du per acre)</td>
<td>4.2</td>
<td>10.5</td>
<td>24.6</td>
<td>16.2</td>
<td>5.7</td>
</tr>
<tr>
<td>Percent of Acres and Units</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Single-family detached</td>
<td>59%</td>
<td>81%</td>
<td>2%</td>
<td>1%</td>
<td>0%</td>
</tr>
<tr>
<td>Single-family attached</td>
<td>1%</td>
<td>0%</td>
<td>3%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Two to four units</td>
<td>3%</td>
<td>4%</td>
<td>5%</td>
<td>4%</td>
<td>1%</td>
</tr>
<tr>
<td>Five or more units</td>
<td>0%</td>
<td>0%</td>
<td>7%</td>
<td>3%</td>
<td>12%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>63%</strong></td>
<td><strong>86%</strong></td>
<td><strong>17%</strong></td>
<td><strong>9%</strong></td>
<td><strong>15%</strong></td>
</tr>
</tbody>
</table>

Source: ECONorthwest

Note: Single-family attached dwellings and structures with two to four units in commercial designations are assumed to develop at the density assumptions used for medium density plan designations. Structures with five or more units in commercial designations are assumed to develop at the densities assumed for high density plan designations.

Note: Totals may be off slightly as a result of rounding.
The residential land needs presented in Table 6 may change based on work in Envision Eugene that includes policy decisions and land use efficiency measures related to changes in the baseline assumptions, which may result in increased or decreased land need.

The next step in the housing needs analysis is to compare the capacity for existing vacant residential land with the demand for new dwelling units. Table 7 shows that Eugene’s vacant residential land has capacity to accommodate approximately 8,277 new dwelling units, based on the following assumptions:

- **Vacant land.** Eugene has about 1,679 acres of vacant land in residential plan designations. Vacant land is on slopes ranging from 0% to 30% slope. Undeveloped land on slopes greater than 30% were not considered buildable in the BLI.

- **Recent densities.** Future development will occur at the same densities as development over the 2001 to 2008 period. Development on slopes generally occurred at lower densities than development on flat land.

- **Land for rights-of-way.** The amount of land needed for rights-of-way (e.g., conversion of net acres to gross acres) will depend on the parcel size, ranging from no land needed on lots one acre and smaller, where rights-of-way are already developed, to an average of 22% on lots 5 acres and larger, where rights-of-way will need to be developed.

Table 7 shows that Eugene has demand for 13,066 new dwelling units in residential plan designations (not including demand for 688 dwelling units in commercial plan designations). Table 7 shows that Eugene has a deficit of land to accommodate 4,789 new dwelling units.

Table 7. Comparison of capacity of existing residential land with demand for new dwelling units, Eugene UGB, 2011-2031

<table>
<thead>
<tr>
<th>Plan Designation</th>
<th>Capacity (DU Potential)</th>
<th>Demand for DU</th>
<th>Surplus or Deficit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low Density Residential</td>
<td>4,924</td>
<td>8,672</td>
<td>-3,748</td>
</tr>
<tr>
<td>Medium Density Residential</td>
<td>1,917</td>
<td>2,379</td>
<td>-462</td>
</tr>
<tr>
<td>High Density Residential</td>
<td>1,436</td>
<td>2,015</td>
<td>-579</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>8,277</strong></td>
<td><strong>13,066</strong></td>
<td><strong>-4,789</strong></td>
</tr>
</tbody>
</table>

Source: ECONorthwest
Note: Totals may be off slightly as a result of rounding.
Table 8 shows the land needed to accommodate the 4,789 new dwelling units needed in Eugene’s UGB over the 20 year planning period. Table 8 assumes that development will occur at the same densities used in Table 7. Based on this assumption, Eugene will need 963 gross acres of additional residential land to accommodate new housing over the 2011 to 2031 period.

Table 8. Deficit of land needed to accommodate new dwelling units, Eugene UGB, 2011-2031

<table>
<thead>
<tr>
<th>Plan Designation</th>
<th>Needed Dwelling Units in Excess of Land Capacity</th>
<th>Density (DU/Gross Acre)</th>
<th>Land Deficit (Gross Acres)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low Density Residential</td>
<td>3,748</td>
<td>4.2</td>
<td>895</td>
</tr>
<tr>
<td>Medium Density Residential</td>
<td>462</td>
<td>10.5</td>
<td>44</td>
</tr>
<tr>
<td>High Density Residential</td>
<td>579</td>
<td>24.6</td>
<td>24</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>4,789</strong></td>
<td></td>
<td><strong>963</strong></td>
</tr>
</tbody>
</table>

Source: ECONorthwest
Note: Totals may be off slightly as a result of rounding.

In addition to the housing types shown in Table 6, Eugene needs to plan for additional group quarters. The analysis assumes the City will add 1,865 persons in group quarters between 2011 and 2031. Assuming that the household size of group quarters is 1.6 persons per household and that group quarters develop at the same density as structures with 5 or more units in the High Density Residential plan designation, Eugene will need about 47 gross acres of land for group quarters over the 20-year period.

The baseline residential land need described in this section, 963 acres of residential land plus 47 acres of land for group quarters, may change based on the discussions occurring as part of the Envision Eugene project.

---

3 This household size estimate is based on 2008 American Community Survey data about the number of occupied units with five or more units (17,235 units) and the population living in structures with five or more units (27,925 persons).
### 4.4 Public and Semi-Public Land Demand

This section summarizes the forecast of needed public and semi-public land in Eugene for the period 2011 to 2031 based on the following assumptions:

- **Parkland** need is based on the City’s plans for parkland acquisition described in the *Parks, Recreation & Open Space (PROS) Project and Priority Plan*. This plan was adopted in 2006 and identifies acquisition and development priorities for a population consistent with that identified in ECLA. Parkland need is based on the specific projects identified in this plan. This need is characterized as follows:
  - 1,980 acres of parkland need are identified in this plan. Of this total, 350 are inside the UGB, while the remaining 1,630 are outside the UGB.
  - Of the 350 acres of future parkland need inside the UGB, it is assumed that 15%, or approximately 50 acres will be located on lands identified as “protected” in ECLA and will not require land that would otherwise be available for development. These 50 acres are a mixture of wetlands and riparian corridors.
  - 140 acres of parkland need identified in the plan are already owned by the City, but are located outside the UGB. These areas include the Golden Gardens expansion area and the Santa Clara Community Park.
  - 160 acres of parkland need are identified in residential areas within the UGB. This parkland will locate on land that would otherwise be used for residential development, reducing the supply of residential land available to accommodate housing over the planning period.
  - The parkland need identified in the plan assumes no expansion of the UGB. If new land is brought into the UGB to accommodate residential development, more parkland (especially for neighborhood parks) may be needed to serve that geographic area.

- **School** land needs are based on the estimate of land need provided by the school districts.
  - The 4J School District does not expect to need new land over the 2011 to 2031 period.
- The Bethel School District expects to need two sites for future schools: (1) an 80-acre site for a high school and (2) a 40-acre site for a K-8 school. These needs could increase if the City expands the UGB and brings more residential land into the UGB in the School District. The District currently owns an 80-acre site that is located outside but adjacent to the UGB. The Bethel School District does not have surplus property.4

- **Public operations and facilities** land needs may be less in the future than the current level of service (6.6 gross acres per 1,000 people) because Eugene already has most of the large public facilities the City is likely to need over the 20-year planning period. Recently built public facilities include: a new Federal building, a new Library, a new site for EWEB facilities, and new fire and emergency facilities. Cities like Eugene typically need new public facilities, as existing facilities pass their useful life span or population grows, such as police stations, fire stations, and other civic buildings. In addition, the University of Oregon expects to need an additional 30 acres for development over the planning period.5 Table 9 shows a need for 2.9 acres per 1,000 people or 100 gross acres of land for public operations and facilities.

- **Semi-public** land need is forecast to be similar to historical needs, at about 1.3 acres per 1,000 people or 45 gross acres over the 20-year period.

---

4 This information was provided by Pat McGillivray, Communications Relations for the Bethel School District in an interview on March 12, 2009.

5 Christopher Ramey, Associate Vice President at the University of Oregon, said that the University expects to purchase and develop roughly 30-acres over the 20-year planning period.
### Table 9. Need for public and semi-public land, Eugene UGB, 2011-2031

<table>
<thead>
<tr>
<th>Type of Use</th>
<th>Assumed Need (Ac/1,000 Persons)</th>
<th>Estimated need (gross acres) 2011-2031</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schools</td>
<td>3.5</td>
<td>120</td>
</tr>
<tr>
<td>4J School District</td>
<td>none</td>
<td>none</td>
</tr>
<tr>
<td>Bethel School District</td>
<td>3.5</td>
<td>120</td>
</tr>
<tr>
<td>Parks and Open Space</td>
<td>NA</td>
<td>300</td>
</tr>
<tr>
<td>Existing land need in the UGB</td>
<td>NA</td>
<td>160</td>
</tr>
<tr>
<td>Golden Gardens and Santa Clara</td>
<td>NA</td>
<td>140</td>
</tr>
<tr>
<td>Public Facilities and Operations</td>
<td>2.9</td>
<td>100</td>
</tr>
<tr>
<td>Semi-Public</td>
<td>1.3</td>
<td>45</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>7.8</strong></td>
<td><strong>565</strong></td>
</tr>
</tbody>
</table>

Source: ECONorthwest  
Note: Totals may be off slightly as a result of rounding.

The demand for public and semi-public land will be accommodated in residential and commercial plan designations, as described in the next section.
4.5 SUMMARY OF LAND SUFFICIENCY WITHIN THE EUGENE UGB

This section summarizes the sufficiency of land within the Eugene UGB to accommodate expected growth over the planning period. The preceding sections show that Eugene has a deficit of commercial and residential land. This conclusion may change or the size of the deficits may change based on discussions in Envision Eugene about land use efficiency, economic development policies (including the need for industrial land with different characteristics than Eugene’s current supply of industrial land), and other land use issues.

Table 3 presented a comparison of employment land demand with employment land supply. Table 3 only considered demand for employment uses located on employment land. Public and semi-public uses and residential uses in employment plan designations will require land in commercial plan designations.
Table 10 shows demand for employment land by plan designation. Table 10 shows:

- **Commercial land demand.** Eugene has demand for 486 gross acres of commercial land based on the following uses:
  
  - 329 gross acres for employment uses shown in Table 3
  - 114 gross acres of commercial land for public and semi-public uses
  - 43 gross acres of commercial land to accommodate residential uses

- **Industrial land demand.** Eugene has demand for 490 gross acres of industrial land shown in Table B-28.

<table>
<thead>
<tr>
<th>Land Demand (Gross Acres)</th>
<th>Commercial</th>
<th>Industrial</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employment Uses</td>
<td>329</td>
<td>490</td>
</tr>
<tr>
<td>Public and Semi-Public Uses</td>
<td>114</td>
<td></td>
</tr>
<tr>
<td>Residential development in Commercial Plan Designations</td>
<td>43</td>
<td></td>
</tr>
<tr>
<td>Total Commercial</td>
<td>486</td>
<td>490</td>
</tr>
<tr>
<td><strong>Total Employment Land Demand</strong></td>
<td><strong>976</strong></td>
<td></td>
</tr>
</tbody>
</table>
Table 11 shows Eugene’s commercial and industrial land sufficiency based on the following information:

- **Commercial land deficit.** Eugene has demand for 486 acres of commercial land based on the land needs shown in Table 10. Eugene has 98 vacant commercial acres. Based on the 486 acres of commercial land need and the 98 acres of vacant commercial land, Eugene has a deficit of 388 acres of commercial land.\(^6\)

- **Industrial land excess.** Eugene has about 434 acres of industrial land in excess of demand for industrial land. The industrial land supply includes one 195 acre site owned by the Metropolitan Wastewater Management Commission, which has limited uses. When Eugene decisionmakers develop a statement of economic development objectives, the analysis of industrial land demand may change, possibly substantially, to implement the economic development objectives.

<table>
<thead>
<tr>
<th>Land Supply (Gross Acres)</th>
<th>Land Demand (Gross Acres)</th>
<th>Land Surplus or Deficit (Gross Acres)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Commercial</td>
<td>98</td>
<td>486</td>
</tr>
<tr>
<td>Industrial</td>
<td>924</td>
<td>490</td>
</tr>
</tbody>
</table>

**Table 11. Commercial and industrial land surplus or deficit, Eugene UGB, 2011-2031**

Source: ECONorthwest  
Note: Totals may be off slightly as a result of rounding.

Table 12 shows that Eugene has a total deficit of 1,411 gross acres of residential land:

- **Low Density Residential deficit.** Eugene has a deficit of 1,244 acres of Low Density Residential (LDR) land based on the following uses:
  - 895 gross acres of LDR land for new housing
  - 291 gross acres of LDR land for public and semi-public uses, including 160 acres for parkland to address existing need within the UGB
  - 58 gross acres of LDR land to accommodate employment

\(^6\) Table 3 shows that Eugene has a deficit of 230 acres of commercial land. This estimate is based on demand for 329 acres of commercial land for employment uses and a supply of 98 acres of commercial land. Table 11 shows that Eugene has a deficit of 388 commercial acres, which includes the 230 acres of commercial land for employment uses, the 114 acres for public and semi-public uses, and the 43 acres for residential development in commercial plan designations.
• **Medium Density Residential deficit.** Eugene has a deficit of 72 acres of Medium Density Residential (MDR) land based on the following uses:
  - 44 gross acres of MDR land for new housing
  - 10 gross acres of MDR land for public and semi-public uses
  - 18 gross acres of MDR land to accommodate employment

• **High Density Residential deficit.** Eugene has a deficit of 94 acres of High Density Residential (HDR) land based on the following uses:
  - 24 gross acres of HDR land for new housing
  - 47 gross acres of HDR land for group quarters
  - 10 gross acres of HDR land for public and semi-public uses
  - 13 gross acres of HDR land to accommodate employment

<table>
<thead>
<tr>
<th>Plan Designation</th>
<th>Land Deficit (Gross Acres)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low Density Residential</td>
<td></td>
</tr>
<tr>
<td>New Housing</td>
<td>895</td>
</tr>
<tr>
<td>Public and Semi-Public Uses</td>
<td>291</td>
</tr>
<tr>
<td>Employment in Residential Plan Designations</td>
<td>58</td>
</tr>
<tr>
<td><strong>Total Low Density Residential</strong></td>
<td><strong>1,244</strong></td>
</tr>
<tr>
<td>Medium Density Residential</td>
<td></td>
</tr>
<tr>
<td>New Housing</td>
<td>44</td>
</tr>
<tr>
<td>Public and Semi-Public Uses</td>
<td>10</td>
</tr>
<tr>
<td>Employment in Residential Plan Designations</td>
<td>18</td>
</tr>
<tr>
<td><strong>Total Medium Density Residential</strong></td>
<td><strong>72</strong></td>
</tr>
<tr>
<td>High Density Residential</td>
<td></td>
</tr>
<tr>
<td>New Housing</td>
<td>24</td>
</tr>
<tr>
<td>Group Quarters</td>
<td>47</td>
</tr>
<tr>
<td>Public and Semi-Public Uses</td>
<td>10</td>
</tr>
<tr>
<td>Employment in Residential Plan Designations</td>
<td>13</td>
</tr>
<tr>
<td><strong>Total High Density Residential</strong></td>
<td><strong>94</strong></td>
</tr>
<tr>
<td><strong>Total Residential Land Deficit</strong></td>
<td><strong>1,410</strong></td>
</tr>
</tbody>
</table>

Source: ECONorthwest
Note: Totals may be off slightly as a result of rounding.
Table 13 summarizes Eugene’s land deficit for the 2011 to 2031 period:

- Eugene will need 1,410 acres of additional residential land
- Eugene will need 388 acres of additional commercial land
- Eugene does not need additional industrial land under the assumptions used in this analysis but may have need for additional industrial land based on discussion of Eugene’s economic development goals, as discussed in Section 4.2

In addition, Eugene has identified parkland need for community parks in the north Eugene area and has purchased a total of 140 acres of parkland for Golden Gardens and Santa Clara parks. These parks would need to be brought into the UGB in order to extend urban services to them and meet the intended purpose of community parks. For this reason, consideration will need to be given to these areas if a UGB expansion process follows. However, it cannot automatically be assumed that these areas will be brought into the UGB. If they are not, the community parkland need in these geographic areas will not be addressed as proposed in local park planning documents and the Project and Priority Plan.

### Table 13. Summary of land deficit, Eugene UGB, 2011-2031

<table>
<thead>
<tr>
<th>Plan Designation</th>
<th>Needed Land (Gross Acres)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Residential</td>
<td>1,410</td>
</tr>
<tr>
<td>Low Density Residential</td>
<td>1,244</td>
</tr>
<tr>
<td>Medium Density Residential</td>
<td>72</td>
</tr>
<tr>
<td>High Density Residential</td>
<td>94</td>
</tr>
<tr>
<td>Commercial</td>
<td>388</td>
</tr>
<tr>
<td>Industrial</td>
<td>---</td>
</tr>
<tr>
<td>Golden Gardens and Santa Clara Parks</td>
<td>140</td>
</tr>
</tbody>
</table>

Source: ECONorthwest
Note: Totals may be off slightly as a result of rounding.
Section 5  POLICY IMPLICATIONS

The main impetus for this project was HB 3337. In 2007, the Oregon legislature passed House Bill 3337, which is codified in ORS 197.304. This is what the statute requires:

- **Separate Urban Growth Boundaries for Eugene and Springfield:** HB 3337 requires each city to “separately establish” its own UGB.

- **Residential Land Analysis:** HB 3337 requires each city to “demonstrate, as required by ORS 197.296, that its comprehensive plan provides sufficient buildable lands within an urban growth boundary established pursuant to statewide planning goals to accommodate estimated housing needs for 20 years.”

The Eugene City Council directed staff to expand the scope of the required analysis to include all lands: residential lands (as required by Goal 10, ORS 197.296 and HB 3337), employment lands (as required by Goal 9) and lands required for other uses (i.e., public and semi-public uses). In short, the ultimate question Eugene will have to address under HB 3337 is whether the currently-acknowledged UGB (lands west of Interstate 5) is adequate to accommodate identified needs for the next 20 years.

This study answers that question by presenting a “baseline” analysis that builds from recent trends. The baseline analysis indicates that Eugene has a deficit of residential and commercial land, and a surplus of industrial land. That conclusion, however, is not the final answer; the City must take additional steps to refine the technical analysis to comply with certain state policy requirements that were not addressed in this analysis. Broadly, these steps include:

---

7 197.304 Lane County accommodation of needed housing. (1) Notwithstanding an intergovernmental agreement pursuant to ORS 190.003 to 190.130 or acknowledged comprehensive plan provisions to the contrary, a city within Lane County that has a population of 50,000 or more within its boundaries shall meet its obligation under ORS 197.295 to 197.314 separately from any other city within Lane County. The city shall, separately from any other city:

(a) Establish an urban growth boundary, consistent with the jurisdictional area of responsibility specified in the acknowledged comprehensive plan; and

(b) Demonstrate, as required by ORS 197.296, that its comprehensive plan provides sufficient buildable lands within an urban growth boundary established pursuant to statewide planning goals to accommodate estimated housing needs for 20 years.

(2) Except as provided in subsection (1) of this section, this section does not alter or affect an intergovernmental agreement pursuant to ORS 190.003 to 190.130 or acknowledged comprehensive plan provisions adopted by Lane County or local governments in Lane County. [2007 c.650 §2]
A determination of the “needed” residential density and mix as required by Goal 10 and ORS 197.296(7) and a refined analysis of housing land needs. Needed residential density and mix are the conditions necessary to provide housing for all residents of Eugene at all income levels.

A statement of economic development objectives as required by OAR 660-009-0025 and a refined analysis of employment land needs, which could impact the need for industrial lands.

Evaluation of new policies to increase the development capacity of lands inside the UGB (sometimes referred to as “land use efficiency measures”) as required by ORS 197.296(7-9) and OAR 660-024-0050(4)8

Evaluation of UGB expansion alternatives if the land use efficiency measures do not result in enough additional capacity to meet identified land needs.

The steps stated above are a simplification of the work that needs to be completed. Embedded in those steps are dozens of policy decisions that will require technical analysis and local review—and ultimately adoption—to comply with statewide land use policy. In short, considerable work lies ahead before the City can meet the requirements of HB 3337. The City has started working on these issues through the Envision Eugene project.

The baseline projection of land sufficiency within the UGB was developed with input from a Community Advisory Committee (CAC), composed of a broad range of stakeholders from Eugene. Below are some examples of key issues that add technical, procedural, and political complexity to the analysis. This is not a complete list of all the issues that the City will need to address as part of the Envision Eugene project:

8 “If the inventory demonstrates that the development capacity of land inside the UGB is inadequate to accommodate the estimated 20-year needs determined under OAR 660-024-0040, the local government must amend the plan to satisfy the need deficiency, either by increasing the development capacity of land already inside the city or by expanding the UGB, or both, and in accordance with ORS 197.296 where applicable. Prior to expanding the UGB, a local government must demonstrate that the estimated needs cannot reasonably be accommodated on land already inside the UGB. If the local government determines there is a need to expand the UGB, changes to the UGB must be determined by evaluating alternative boundary locations consistent with Goal 14 and OAR 660-024-0060.”
Housing

- **Is Eugene providing enough affordable housing?** The Oregon state land-use program focuses on housing density and housing type, and requires cities plan for “housing types determined to meet the need shown for housing within an urban growth boundary at particular price ranges and rent levels.” Implicit in the program is the assumption that more multifamily housing not only increases the efficiency with which urban land is used and reduces the loss of farmland to urban development, but also provides denser, smaller, less expensive dwelling units that will be affordable to more households. The Oregon program does not, however, have specific tests directly related to affordability. This ambiguity is frequently a source of conflict in local and state review in that there is no correct or best way to make a determination of needed housing at particular price ranges in rent levels. Despite this ambiguity, Eugene must still make a determination about the needed housing density and mix.

A key finding from this study is that an affordability gaps exist for lower income households. As a result, Eugene’s needed density is higher than the achieved density and Eugene’s needed mix is for more affordable housing types (less single-family detached and more of other housing types). The determination of needed density and mix will be made as a part of Envision Eugene.

- **What type and density of housing does Eugene need?** The type of permitted housing affects its density (dwelling units per acre), and density is a measure of the capacity of vacant, buildable land to accommodate population and employment growth. Assumptions about the future density of development are among the most contentious in a UGB assessment—and have been a source of contention on several recent projects in Eugene. Should one assume that future development will occur at the maximum permitted density, or at the average recent density of development? How fine should the disaggregation of the analysis be: one number for the overall average density of all residential development, or many numbers to address multiple zoning types, locational characteristics, and physical conditions? This issue relates to a core requirement of the housing needs analysis: the determination of needed density and mix.

- **What are the appropriate locations for higher density housing types?** The residential land inventory did not identify a substantial amount of buildable land in the medium- and high-density residential (MDR and HDR) plan designations. The largest HDR
site is about 30 acres and is west of Danebo road near Highway 126. What locations are appropriate for higher density housing types is a question that will ultimately need to be addressed in this planning process. The Infill Compatibility Standards and the Opportunity Siting committees have been working on these issues; the City will be required to demonstrate a match between land need and land inventory. Approaches for addressing this issue could include redesignation of lands designated for other uses. One example includes surplus sites owned by the Eugene 4J School District.

- **How much redevelopment should Eugene plan for?** Probably the most contentious issue for the CAC was the amount of new growth that would be accommodated by redevelopment. The analysis done for this study suggested that since 2000 just under one out of every 10 new homes built during that period was built on land that the buildable land inventory classified as developed; the other nine were built on land classified as vacant. But even if one accepts that approximation as accurate, what will happen in the future is still open for discussion. Will that rate drop because, for example, the demand for redevelopment for student housing will attenuate? Or will it increase because of market conditions (e.g., aging of the population; increase fuel prices) and policy conditions (e.g., limited additions of buildable land to the UGB)?

The City has two committees addressing redevelopment (and infill): the Infill Compatibility Standards and the Opportunity Siting committees. The work of these committees will be considered as part of the Envision Eugene process and will help to inform community values and potential policy changes.

- **How will recent trends in student housing affect housing need throughout Eugene?** Some members of the CAC noted the recent trend around the University of Oregon to develop multiplex buildings where each dwelling unit has four or more bedrooms. The high value of these units has led to the redevelopment (i.e., demolition) of single-family dwellings, and to increases in parking problems in some cases. Though this situation is an issue for some specific neighborhoods, the overall effect on the need for land inside the UGB is relatively small. In other words, while this issue may be one that the City wants to address, doing so is not required to comply with HB 3337.

- **How should the analysis address the inherent uncertainty of 20-year forecasts?** Estimating housing need for the 20-year planning period requires making assumptions about key variables that are
uncertain: for example, changes in population, tenure percentages, income, housing price, housing mix, housing vacancy, household size, percent of population living in group quarters, and other demographic characteristics.

The more disaggregated and detailed the forecast, the greater are the chances that the forecast will be wrong. For example, one’s probability of predicting which league will win the World Series is around 50%; the probability of predicting which team will win the World Series is much lower (one in 30 or about 3.3%). Similarly, analysts are likely to make better predictions of the total amount of housing that will be built in Eugene than they are of the amount of housing, by type that will be built in different subareas of Eugene.

For example, one issue raised by the CAC was the potential for changes in household size over the 20 year period. Over the last 20 years, household size has decreased steadily. There are demographic changes that suggest household size will continue to decrease, such as growth of the share of people over 60 years old, who typically have smaller households than younger people. There are other trends that suggest that household size will increase, such as growth in Hispanic households, which typically have larger than average household size, or growth in student housing with more than four bedrooms.

**Employment**

- **Eugene does not have a statement of economic development objectives as required by OAR 660-009-0025.** One of the steps in assessing a city’s employment land supply is to clearly articulate the city’s economic development objectives. OAR 660-009 encourages cities to develop economic development objectives through a public process, such as a visioning process. Eugene does not have an existing economic development policy document or plan that articulates the City’s economic development objectives. The economic opportunities analysis presented in Appendix B does not comply with the requirements of Goal 9 as it presently stands. Through the Envision Eugene process, the City should develop economic development objectives and, possibly, reevaluate the demand for employment land based on these objectives, in order to meet the requirements of Goal 9.

- **Does Eugene have the “right” land supply to accommodate employment growth?** The characteristics of Eugene’s existing vacant commercial and industrial sites larger than 5 acres may not be satisfactory for attracting or growing businesses. Key issues
include: lack of large sites, wetlands, lack of sites with proximity to I-5, and the grouping of sites along Hwy 99 north. The process required by Goal 9 and OAR 660-009 is to adopt local economic development objectives which then are used to identify target industries. The characteristics of sites needed by target industries is then compared to the land inventory to make a determination of the sufficiency of suitable sites. The employment land needs estimates in this report does not address site sufficiency, and as a result do not fully comply with Goal 9.

- **Does Eugene want to attract large employers that require large sites?** The lack of clear economic development objectives makes this question hard to answer. Goal 9 allows cities to be “aspirational” in local economic development plans. A city can adopt policies to attempt to attract specific types of firms, including types of firms that have not historically located in the city. Many cities aspire to attract large employers that require large sites (e.g., sites larger than 50 acres). Goal 9 allows a city to increase the amount of their buildable lands for employment beyond what might be calculated to strictly match forecasted employment if it demonstrates that it lacks certain need site types. Such an action, though allowed, is optional: a city must decide that it wants to have the additional site types so as to have a chance of attracting such industries. Such decisions are typically found in a city’s economic development plan or plan element. But since Eugene does not have clearly articulated statement of economic development objectives (as required by OAR 660-009-0025), particularly objectives pertaining to sites, this step will require direction from the City Council about whether the City should assume any need for large sites.

- **How much new employment will locate on non-employment land or on land that is already developed?** Not all new employment will require vacant employment land. There are four typical circumstances under which new employment does not require additional employment land; new employment may be accommodated (1) on land that is not designated primarily for employment uses: e.g., home occupations that are located in residential plan designations; (2) in existing built space (e.g., adding a new cubicle to an existing office, or by extending the hours of operation); (3) in a new building on land that was not classified as vacant and buildable (e.g., building a restaurant in a large parking lot of a retail store); and (4) on developed land that gets redeveloped at a higher density.
A question that may need to be considered in Envision Eugene is how much of Eugene’s forecasted new employment will not require land classified as vacant. In the Envision Eugene process, the City may model different assumptions about the amount of employment that can be accommodated in existing developed areas. In the end, however, the assumptions about the amount of employment that will be accommodated on land not classified as vacant (which is primary developed land, so such accommodation would be classified primarily as redevelopment) are policy choices that require direction from Eugene’s decision makers.

**Mixed-use lands**

- **How does the City want to proceed with mixed-use lands?** Mixed-use (primarily residential and commercial) is a key city strategy that is embedded in the Metro Plan, TransPlan and other policy documents. Moreover, there are different “flavors” of mixed use: nodal development, mixed-use plan designations, housing development in commercial plan designations, and employment uses in residential plan designations. Success of dense mixed use development in these types of mixed use areas depends on a range of factors—and the strength of market demand for mixed development types. Additional opportunities exist for new mixed use centers, for housing in commercial areas, and for housing downtown.

**Determination of sufficiency of lands with the UGB to accommodate 20-year land needs**

- **What land efficiency measures should Eugene consider?** The City will be required to adopt some suite of measures to increase the capacity of lands within the UGB. Staff have already identified potential strategies as part of Envision Eugene and are in the process of evaluating the impact of those strategies. The key issue here is that the strategies must demonstrate that they will yield the stated land efficiencies. For housing, if needed density is greater than actual (observed) density, the burden of proof is articulated in ORS 197.296(7):

  “… the local government … shall adopt measures that demonstrably increase the likelihood that residential development will occur at the housing types and density and at the mix of housing types required to meet housing needs over the next 20 years.

For example, if the City wants more redevelopment, or development of housing at higher densities, it may have to take
policy steps to ensure that it will happen and where it should happen.

**CONCLUSION**

The ECLA process provides the technical analysis necessary to meet Eugene’s obligations for the residential land determination under HB 3337. It does not, however, address all of the technical and policy work required to justify establishment of a separate UGB for Eugene, nor does it make a final determination about land sufficiency within the Eugene portion of the Eugene-Springfield Metropolitan UGB.

The baseline analysis presented in this report suggests that the City has a deficit of residential and commercial lands. That determination triggers a number of statewide planning requirements—particularly the requirement to review and adopt land use efficiency measures to reduce the size of a UGB expansion.

Moreover, the ECLA process was a technical process that, at Council’s direction, did not address policy issues. Key policy issues such as identification of economic development objectives, adopting a needed housing density and mix, and articulating redevelopment and other land efficiency strategies must be addressed to make the final UGB determination.
APPENDIX A: Buildable Land Inventory

A.1 Introduction

The Eugene Comprehensive Lands Assessment (ECLA) Buildable Lands Inventory (BLI) identifies categories of committed, protected, developable (vacant), and developed lands within the Eugene Urban Growth Boundary (UGB). See Appendix A.4: Definitions for definitions of these terms and others as used in this chapter. The section of the ECLA study presented in this chapter gives an estimate of land supply in gross acres by these land base categories for all areas within the Eugene UGB, with a focus on the developable land supply. These totals are further categorized by Comprehensive Plan Designation.

The amount of vacant land comprises the buildable land supply. Population growth creates demand for residential, employment, and other (e.g. public) land supply. The comparison of estimates of land supply and projected land demand within the 20 year planning horizon determines the predicted sufficiency of this land supply. Residential housing trends, future commercial and industrial site needs, assumptions regarding likelihood of redevelopment of land, and many other factors affect quantification of the sufficiency of the estimated current land supply.

In the following, we present the datasets used, methodology employed, definitions of terms and classifications used, and constraints considered in estimating the amount of committed and protected land to set aside from the supply of buildable land. Lane Council of Governments staff worked closely with ECONW and City of Eugene staff in reviewing methodology and products of each phase of the analysis. Information on characteristics of the land supply and the relevance of the assessor’s database came from real estate appraisal expert John Brown of Evans, Elder & Brown Inc. Information on the extent and proper consideration of constraints came from environmental planning expert Steve Gordon. Additional review and comment on general methodology and specific issues such as the constraints and the definition of vacancy used in the study were given by the ECLA Technical Advisory Committee and the ECLA Community Advisory Committee.

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1 Buildable land that is developed but could be redeveloped is accounted for through the analysis of redevelopment, which is presented in the Housing Needs Analysis.
A.2  Methodology

A.2.1  Datasets Used

The analysis in this chapter employs datasets maintained on regional servers by the Lane Council of Governments, City of Eugene, and many others, as well as data acquired from contractors or other external sources, such as the state or federal government. A full Listing of the data sets used can be found in Appendix A.5: Datasets Used. These datasets include tabular assessors’ data, permit data and planning applications as well as GIS data describing tax lots, land use, boundaries and regulatory zones (such as the plan boundary, urban growth boundary, zoning and plan designation), and many types of environmental, physical, and policy constraints, including wetlands, slope, and flood hazards. Aerial photography flown in the spring of 2008 was also available for visual verification of land condition.

A.2.2  GIS Methodology

Spatial data layers were processed using the ESRI ArcGIS 9.3 Model Builder application to determine zoning district, plan designation, and constraints occurring on all portions of all tax lots in the Eugene plan boundary (determined, for the purposes of this study, to be divided from the rest of the Metro Plan area by the center of the I-5 right-of-way). A complete description of the GIS processing framework is described in Appendix A.6: GIS Processing Framework.

The GIS analysis of the input data sets used to determine parcel condition results in an analysis fabric that can be queried for combinations of attributes of land condition which can then be used for classification of the landscape into categories useful for subsequent analysis with respect to meeting the projected demand for various kinds of lands.

A.2.3  Land Base Classifications

All lands in the Eugene UGB are categorized into the classifications represented in the matrix presented in Figure 1. This matrix creates a mutually-exclusive classification of land condition that is organized by factors that affect development capacity.

Both vacant and developed lands (through redevelopment) can accommodate future demand. The amount of the developed land supply that is available for redevelopment is estimated based on a projection of the historical demand for the types of development that can occur on redevelopment sites. This demand for redevelopment sites is assessed in Appendix B for employment land and Appendix C for residential land.

The Presence of Improvements and Constraining Conditions are the two sets of factors used in classifying all land in the Eugene UGB. The two possible values for Presence of Improvements are developable (wholly vacant) and developed (at least partially improved). Lands with development constraining conditions may be prohibitively constrained, partially constrained (partial constraints are also called
“mitigating constraints”), or unconstrained. Further subdivisions of these categories by land use plan designation are discussed below. All land in the study area is assigned to one of these categories.

**Figure 1: Land Development Status Matrix**

<table>
<thead>
<tr>
<th>Constraining Conditions</th>
<th>Presence of Improvements</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Developable</td>
</tr>
<tr>
<td>Prohibitively Constrained</td>
<td>Committed</td>
</tr>
<tr>
<td></td>
<td>Protected</td>
</tr>
<tr>
<td>Partially Constrained</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Partial development potential</td>
</tr>
<tr>
<td>Unconstrained</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Full development potential</td>
</tr>
</tbody>
</table>

100% of all land in the study area (the Eugene UGB) is assigned to one of these categories.

The impact of mitigating constraints and the potential for redevelopment capacity are factors that will be accounted for in the comparison of supply and demand presented in the Housing Needs Analysis and the Economic Opportunities Analysis. For the purposes of this section of the analysis, categories 3 and 4 above are combined.

The remaining four possible categories are:

- Committed 1
- Protected 2
- Developable (Partially Constrained or Unconstrained) 3 4
- Developed 5

Figure 2 conceptually depicts the process by which lands are classified into these categories. Note that any lands with significant improvements are classified as developed. Also note that although mitigating constraints are part of the
classification scheme, mitigating constraints are not addressed in the buildable lands inventory but are considered for their affect on land capacity and suitability in the Housing Needs Analysis and the Economic Opportunities Analysis.

**Figure 2: Land Base Classification Process**

![Diagram of Land Base Classification Process]

### A.2.4 Constraining Conditions

Constrained lands are those whose characteristics reduce their maximum development capacity below that which would be present were the constraints not present. Development constraints include committed lands, protected lands, and physical constraints to development. Committed lands are those that have been dedicated to a long term, typically public, use. Protected lands are those that are recognized in local, state or federal policy to be environmentally sensitive enough to preclude development. Physical constraints that act only, or mostly, through market forces—such as steep slopes—are also included in the protected category.

**Committed Lands**

Public lands and other lands have no development potential because they are committed to other uses during the planning period. The Committed lands identified and used in ECLA are as follows:

- City, County and State Parks
- School District Property
- Utility Property
- Transportation Rights-of-Way
- Other Government Property
- Cemeteries
- BPA easements
Protected Lands
Lands reserved to protect natural resources or prevent the impact of natural hazards prohibit all development. The protected lands identified and used in ECLA are as follows:

- FEMA floodway
- Goal 5 riparian corridors and surrounding protection areas
- Goal 5 wetlands and surrounding protection areas
- West Eugene Wetlands and surrounding protection areas
- Goal 5 uplands and surrounding protection areas
- Wildlife habitat (federally listed threatened and endangered species)
- Historic and cultural resources
- Natural resources (NR) zoned areas
- Steep slopes

Partially Constrained Lands
Lands with physical characteristics that usually decrease the maximum development capacity of the land are described as constrained. Partial constraints have reducing or increasing effects on the capacity of different types of development (e.g. residential or employment lands). For the purpose of ECLA, partial constraints include the following:

- Slope
- 100-year floodplains
- Geologic hazards (areas prone to landslides)
- Local Wetland Inventory (LWI) wetlands

---

2 Empirical analysis was performed to assess the historical effect of steep slopes in prohibiting or reducing residential, commercial and industrial development densities. It was assumed that developable lots with steep slopes will prohibit or at least partially constrain future development depending on the findings of this analysis. More specifically, it was assumed that steep slopes will prohibit development if no historical development has occurred on slopes of that percent or larger. The slope analysis found that there were clearly slope levels above which each basic development type rarely occurred:

- Industrial: > 15% (most development occurred at or below 5%)
- Commercial: > 30% (most development occurred at or below 10%)
- Residential: > 30% (most development occurred at or below 25%)

Slopes higher than the thresholds listed above are considered effectively prohibitive. Slopes at or below the thresholds listed above may partially reduce development capacity. This is addressed in the Housing Needs Analysis and the Economic Opportunities Analysis.
A.2.5 Identifying Improvements

Significant improvements are defined, for the purposes of this study, as built structures or other constructed improvements to land of at least $1,000\textsuperscript{3} in 2008 assessed real market value. This includes:

- Buildings, including unoccupied or sub-standard structures
- Paved parking
- Other improved common areas

This does not include temporary uses of the land, such as the storage of vehicles, equipment, products, or raw materials. For the purposes of this study, land having significant improvements, identified as having a non-vacant use, and not otherwise committed or protected is considered developed\textsuperscript{4}; land without significant improvements, identified as having a vacant use, and not otherwise committed or protected is considered wholly vacant and developable.

A.2.6 Land Use Development Potential

Many factors influence the development potential of a parcel of land. The discussion thus far has focused on the relative availability of land for development, not on the future use of a parcel. As can be seen in the preceding discussion, the current condition (presence or absence of constraints and improvements) of a parcel has significant influence on its potential. In addition to current condition, land use planning policy implemented through zoning districts and plan designations exerts significant influence over the development potential of a parcel.

This study relies on three factors that impact land development potential:

- **Land use** is the current state of land. We rely on spatially-explicit descriptions of land use as a starting point for determining land capacity.
- **Plan Designation** areas describe the future intended use of a parcel of land

The type and intensity of urban development is dependant not only on constraint conditions and degree of improvement, but also on development policies applied by plan designations. Where this analysis identifies developable land, that land is developable for the uses allowed by the plan designations that apply to the specific parts of that land.

\textsuperscript{3} This amount was used after a review of other larger candidate values as being the best compromise between the two hazards of (1) including properties as developable that in fact have significant improvements (as identified in air photo review), or (2) identifying property as not developable when the improvements on it were not significant. The results of using this measure were reviewed in map form by members the CAC and Eugene staff. Any necessary adjustments were made to the supply.

\textsuperscript{4} Land identified as developed by this measure is still potentially available for redevelopment.
A.2.7 Determination of tax lot zoning and plan designation status

Spatial datasets representing tax lot boundaries, zoning districts, and comprehensive plan designations are maintained at differing scales of accuracy and are based legally on maps adopted at specific scales. The result of this is non-conformity or indeterminacy between the edges defining these entities along proximate borders. In some cases this may be intentional where a single parcel might be zoned or planned for more than one allowable or future uses. In the majority of cases, however, such discrepancies are not intentional, and produce small slivers of parcels zoned or designated to a category different from that of the remaining majority of the parcel. These conditions are accommodated in a logical and consistent manner within the analysis, as here described.

The City of Eugene maintains a file of split-zoned lots for planning purposes. Lots contained in this file of known zone-split lots were identified and intersected by the Eugene zoning file. All other lots were assigned zoning based on the zoning identified at the geometric center of the lot.

The plan designation map was adopted at a relatively large scale (small geographic representation) of 1:1,500. No file is maintained by the city of known plan-split lots as is the case for zoning districts. A three step process was used to identify those lots having a substantive portion in two or more differing plan designations versus those that have only a minor portion in an adjoining plan designation. Those lots not identified as candidate split lots were considered designated according to the plan designation found at the geometric center of the lot. Step one of the process identified lots that had boundary discrepancies greater than the map accuracy of the adopted comprehensive plan map. The second step determined those lots having boundary discrepancies with proportions greater than or equal to 15%. These lots were then referred to City of Eugene planning staff to determine if the lot should have split-plan status, or should be allotted to a single category. This feedback was incorporated into the analysis data set.
A.3 Results

This section presents, in tabular and map formats, the amounts and patterns of land in the land base categories described above, including prohibitively constrained lands (committed or protected), developed lands, and developable (vacant buildable) lands in the UGB. Each is further presented as it relates to plan designation.

A.3.1 Land Base

There are approximately 34,500 acres in the Eugene UGB. This area is divided into plan designations in the approximate proportions shown in Figure 3. A map of plan designated lands in the UGB is presented in Figure 4.

Land by plan designation can also be viewed in terms of the lots (and lot subareas), organized by size class, which occur in each plan designation. Because some lots are split by plan designation, the significant area for development is the portion of the lot in a particular designation (referred to here as lot subareas). The distribution of those lot subareas classified by plan designation and size class is depicted in Figure 5a-b. A map of the spatial distribution of lot sizes in the UGB is presented in Figure 6.

These breakdowns by lot and lot subarea sizes are significant in several ways.

The suitability of unused development capacity on a lot will depend in part on lot size (along with lot configuration and location). Smaller lots may not support certain types of development (although smaller lots or portions of them that are adjacent configured properly may be able to be combined to form larger development sites).

Different methods of capacity estimation will also apply to lots of different sizes. Larger lots may have larger proportions of their area set aside for certain supporting uses such as schools, parks, open space, and transportation rights-of-way. The inventory of buildable lands presented in this chapter describes the gross acreage.

---

5 For example, a 100-acre tax lot with 10 acres in Campus Industrial and 90 acres in Parks and Open Space is not as useful for industrial development as a 100-acre tax lot with 90 acres in Campus Industrial and 10 acres in Parks and Open Space.
Figure 3: Land Base Acres by Plan Designation

- Low Density Residential: 19,503 acres
- Parks and Open Space: 2,974 acres
- Light Medium Industrial: 2,656 acres
- Medium Density Residential: 1,982 acres
- Commercial: 1,843 acres
- Heavy Industrial: 1,873 acres
- Campus Industrial: 994 acres
- High Density Residential: 669 acres
- Government & Education: 732 acres
- Major Retail Center: 346 acres
- Special Heavy Industrial: 238 acres
- Natural Resource: 160 acres
- Mixed Use: 134 acres
- University Research: 109 acres
- Agriculture: 23 acres
- Medium Density Res Mixed Use: 62 acres
- High Density Res Mixed Use: 54 acres
- Forest Land: 4 acres
- Commercial Mixed Use: 47 acres
- Sand and Gravel: 41 acres
- Rural Residential: 0 acres

- Residential: 65%
- Industrial: 17%
- Government and Education: 2%
- Mixed Use: 1%
- Other: 9%
Figure 4: Map of Plan Designated Lands
**Figure 5a: Number of Tax Lot Subareas by Plan Designation and Size Class**

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<th>Subarea Plan Designation</th>
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### Figure 5b: Acres of Tax Lot Subareas by Plan Designation and Size Class

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Figure 6: Map of Lot Sizes

- Urban Growth Boundary

**Tax Lot Subarea Size Classes**

- 0.0 - 0.1
- 0.25 - 0.5
- 1.0 - 2.5
- 5 - 10.0
- 25.0 - 50.0
- 100.0 - 250.0

- 0.1 - 0.25
- 0.5 - 1.0
- 2.5 - 5.0
- 10.0 - 25.0
- 50.0 - 100.0
A.3.2 Prohibitive Constraints
The presence of lands affected by a prohibitive constraint (committed, protected) factor is presented in Figure 7. Acres and percentages are provided for the area within the UGB. The percentages shown are the percent that the acreage is of the entire UGB. The acreages in the two categories do not add up to the total because there is overlap between committed lands and protected lands. For example, several parks owned by the City of Eugene (committed) are also located near waterways that are protected by city code (protected).

A map of the spatial distribution of committed and protected lands in the UGB is presented in Figure 8.

A.3.3 Presence of Improvements
The presence or absence of significant improvements determines whether unconstrained lands are considered developed or developable. Combined with the prohibitive constraints, these characteristics determine the development status of all lands in the UGB.

---

6 The presence or absence of significant improvements on prohibitively constrained (committed or protected) lands was not assessed.
### Figure 7: Acres by Development Prohibiting Factors

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Figure 8: Map of Committed and Protected Lands
Development Status

Development Status refers to the matrix of categories of constraint by categories of improvement presented earlier in Figure 1. The analysis steps used in determining this are presented in Figure 2. Presented below in Figure 9 is a version of Figure 2 which includes the amount of land in each of the derived categories. Note that the acres for committed lands are classified first, even if the land in question also has attributes that would put it in the protected category. This means that much of the acreage in “Committed” could also have been reported in “Protected” and that the amount of protected acres is not a measure of the amount of land that may be protected within the UGB. That number is higher and can be seen in Figure 7 above. The term “Protected” in Figure 9 and the following figures refers to land that is protected and not otherwise constrained, i.e. committed.

These development status categories can be further related to each plan designation. This relationship is presented in Figures 10a-10c. It is important to recall that plan designations describe the intended use of land rather than its current use. There is no contradiction in saying that there are developed acres in designations like Forest Land or Parks and Open Space. It is also important to note that the Natural Resource plan designation was considered a prohibitive constraint and so no developable or developed acres appear in that designation. Similarly, the Government and Education plan designation does not show any developable or developed land because public lands were considered off-the-table for development and were included in the committed category.7

A map of all four development status categories is presented in Figure 11.

As stated earlier in this chapter, the focus of this section of the ECLA analysis is on the supply of developable lands. The supply of unconstrained vacant lands may be found in the Developable column of figure 10a. A map of developable lands is presented in Figure 12.

A map of developable lands by plan designation is presented in Figure 13.

Lot size is an important consideration in the assessment of the suitability of the land supply to meet the projected demand, particularly the short-term suitability of the supply of industrial and other employment lands. The relationship between lot subarea size and plan designation for developable land is presented in Figure 14a-b. A map of developable lands by lot subarea size is presented in Figure 15.

---

7 In discussions with City of Eugene and ECONW staff, the following agencies identified properties that they may surplus (add to the land supply) within the 20-year study period.

  - Developed Sites:
    - Dunn / Opportunity Center (4.5 acres)
    - Bailey Hill (5.6 acres)
    - Civic Stadium (9.8 acres)
  - Developable Sites:
    - Coburg Farm (28.0 acres)
- EWEB: May surplus about 15 acres (locations not identified).
Figure 9: Land Base Classification Process, Including Acres

All Land

34,446 ac.

Committed?

11,999 ac.

YES

Committed

18,151 ac.

Protected?

1,539 ac.

YES

Protected

2,758 ac.

Improvements?

YES

Developed

NO

Developable

NO

NO
Figure 10a: Acres by Plan Designation and Development Status

<table>
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<tr>
<th>Plan Designation</th>
<th>Development Potential</th>
<th>All Land</th>
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<tr>
<td>Commercial</td>
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<td>662</td>
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<tr>
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<tr>
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<td>897</td>
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<tr>
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<td>1,539</td>
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</table>

Buildable land, for the purposes of this study, refers to the combination of all vacant developable land and all developed land. Developed land is included because all developed land is considered potentially redevelopable. Not all developed land is likely to redevelop in the 20-year planning period.
Figure 10b: Development Status as Percent of Acres by Plan Designation

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### Figure 10c: Plan Designation as Percent of Acres by Development Status

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</table>
Figure 11: Map of Development Status

- Urban Growth Boundary

**Development Status**
- Committed
- Developable
- Protected
- Developed

Scale: 0, 0.5, 1, 2 miles
Figure 12: Map of Developable Lands

- Urban Growth Boundary
- Roads
- Developable
Figure 13: Map of Developable Lands by Plan Designation
## Figure 14a: Number of Developable Tax Lot Subareas by Plan Designation and Size Class

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<th>0.25 - 0.5</th>
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<th>2.5 - 5</th>
<th>5 - 10</th>
<th>10 - 25</th>
<th>25 - 50</th>
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<td>9</td>
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<td>-</td>
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</tr>
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### Figure 14b: Acres of Developable Tax Lot Subareas by Plan Designation and Size Class

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<th>&lt; 0.1</th>
<th>0.1 - 0.25</th>
<th>0.25 - 0.5</th>
<th>0.5 - 1</th>
<th>1 - 2.5</th>
<th>2.5 - 5</th>
<th>5 - 10</th>
<th>10 - 25</th>
<th>25 - 50</th>
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<td>-</td>
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<td>7.1</td>
<td>4.8</td>
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<td>4.0</td>
<td>2.2</td>
<td>3.3</td>
<td>-</td>
<td>42</td>
<td>-</td>
<td>-</td>
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<td>53</td>
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<td>-</td>
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<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>0</td>
</tr>
<tr>
<td>Special Heavy Industrial</td>
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<td>-</td>
<td>-</td>
<td>-</td>
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<td>-</td>
<td>-</td>
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<td>195</td>
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<tr>
<td><strong>Total Acres</strong></td>
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<td>188.0</td>
<td>295.6</td>
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<td>484</td>
<td>280</td>
<td>204</td>
<td>195</td>
<td>2,758</td>
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</tbody>
</table>
Figure 15: Map of Developable Lands by Lot Subarea Size

Legend:
- Urban Growth Boundary
- Roads

Tax Lot Subarea Size Classes (Developable)
- 0.0 - 0.1
- 0.25 - 0.5
- 1.0 - 2.5
- 5 - 10.0
- 25.0 - 50.0
- 100.0 - 250.0
- 0.1 - 0.25
- 0.5 - 1.0
- 2.5 - 5.0
- 10.0 - 25.0
- 50.0 - 100.0
Summary

In this section of the analysis, the goal is to assess the supply of land in the Eugene UGB area as classified by development status, plan designation and lot subarea size. The focus is on identifying the supply of developable land. We do not interpret the land supply described in terms of its suitability for meeting the estimated demand. That comparison occurs in the Housing Needs Analysis and the Economic Opportunities Analysis.
Appendix A.4. Definitions

**Buildable Land** – The combination of all (a) *Developable Land* and (b) *Redevelopable Land*. In other words, all the land that remains in the study area (i.e. the Eugene UGB) after the removal of all *Committed, Protected, or Fully Developed Land*. The buildable lands portion of ECLA summarizes the gross acreage of buildable land by plan designation categories.

**Committed Land** – Public lands and other lands with no development or redevelopment potential because they are committed to other uses during the planning period. The Committed lands identified and used in ECLA are as follows:

- City, County and State Parks
- School District Property
- Utility Property
- Transportation Rights-of-Way
- Other Government Property
- Cemeteries
- BPA easements

**Constraining Conditions** – The second of two dimensions for classifying all land in the study area (the first was Presence of Improvements). Constraining conditions affect the ability of land to be developed. The four possible values are: (1) *Committed*, (2) *Protected*, (3) *Partially Constrained / Capacity Adjusted*, and (4) *Unconstrained*. 100% of all land in the study area (i.e. the Eugene UGB) is assigned to one of these four categories.

**Developable Land** – Land with no significant improvement present, identified as having a vacant use, and which can be developed within the 20-year planning period.

**Developed Land** – Land which is not *Developable*, as defined above.

**Fully Developed Land** – Developed land not likely to redevelop within the 20-year planning period.

**Improvements** – Human changes to the land, including:

- Buildings, including unoccupied or sub-standard structures
- Paved parking
- Other improved common areas

Not including temporary uses of the land, such as the storage of vehicles, equipment, products, or raw materials.
Partially Constrained – Lands affected by factors that usually decrease the development capacity of the land. Partial constraints can have a different effect (or no effect) on different types of development (e.g. residential, industrial, and other employment). For the purpose of ECLA, capacity factors include the following:

- Moderate Slopes
- 100-year Floodplains
- Geologic Hazards (e.g. areas prone to landslides)
- LWI Wetlands

Presence of Improvements – The first of two dimensions for classifying all land in the study area (the second is Constraining Conditions). The two possible values are: (1) Developable (fully vacant), and (2) Developed (fully or partially). 100% of all land in the study area (i.e. the Eugene UGB) is assigned to one of these two categories.

Protected Land – Lands reserved to protect natural resources or prevent the impact of natural hazards. These lands prohibit all development or redevelopment. The Protected lands identified and used in ECLA are as follows:

- FEMA Floodway
- Goal 5 Riparian Corridors and Surrounding Protection Areas
- Goal 5 Wetlands and Surrounding Protection Areas
- West Eugene Wetlands and Surrounding Protection Areas
- Goal 5 Uplands and Surrounding Protection Areas
- Historic and Cultural Resources
- Natural Resource (NR) Zoned Areas
- Wildlife Habitat (federally listed threatened and endangered species)
- Steep Slopes

Significant Improvement – An improvement having a 2008 assessed improvement value of at least $1,000.

Unconstrained Land – Land whose development capacity is not eliminated or reduced by the other three categories of limitations (Committed, Protected, Partially Constrained) within 20-year planning period (i.e. by 2028).
Appendix A.5. Datasets Used

Data Currency
All input datasets used in this analysis were copied from the regional land information database (RLID) or acquired from an external source. The regional data was extracted from the database on December 5, 2008. Data currency varies from dataset to dataset and is not easily summarized, however, these datasets are the best known and available representation of the characteristics of study area lands as of December 5, 2008.

Land Base (Phase 1)
In the first phase of the analysis, land use, regulation, and boundary layers are combined to form a representation of the current land base.

Input layers in this phase copied from the regional database are:

- Tax Lots
- Existing Land Use
- Plan Designation
- Zoning
- UGB
- Metro Plan Boundary (Eugene portion, defined as west of I-5)

Tax lot data includes property values (land and improvements) and ownership and tax-exempt status information, as well as other attributes from the regional tax assessor’s database.

Existing Land Use is the main source of information used to identify vacant and developed lands.

Comprehensive Plan Designations are used as the aggregation class. Buildable lands will be totaled by each plan designation.

Zoning is included for capacity calculations that are not part of the BLI portion of ECLA.

The UGB and Metro Plan Boundary layers are used to define the study area boundary and a surrounding area of interest (useful for future studies beyond the scope of ECLA).

In Phase 1, the model also supports adjustments for near-term approved projects of known size that are pending construction (i.e. in the “development pipeline”). These projects were identified in communication with Eugene staff and using data from Lane County Assessment & Taxation to identify subdivisions that are approved, but have not been entered into the tax lot data yet.
Limiting Factors/Constraints (Phase 2)

Phase 2 adds development limiting factor layers. These layers represent “prohibitive constraints”, meaning that no development capacity exists in the affected area. In addition to “protected” constrained lands (i.e. land constrained by natural hazards and resource protection), the constraints section also integrates the consideration of “committed” lands, meaning lands such as public rights-of-way, parks, open space, infrastructure, and institutional uses, which are excluded from the supply.

In Phase 2, the model also supports adjustments for the changing disposition of public lands (such as via surplus and acquisition). The constraint layers can be adjusted (subtracted from or added to) by means of additional layers identifying the surplussed and acquired properties. These properties are identified by discussions with the relevant property owning agencies.

The following are three lists showing those constraints (A) deemed prohibitive to development, and those constraints not used in the supply analysis due to being (B) not prohibitive or (C) not present in the study area.

The notes following each item are based on discussions between Eugene, ECONW and LCOG staff between September 2008 and May 2009.

A. Prohibitive Constraints

- Flood Hazards
  - Specified as prohibitive by Eugene staff.
  - Only FEMA Floodway is used.
  - 100-year flood plain zones are not prohibitive, but are included in case they are useful as a mitigating constraint (i.e. in calculating reduced capacity).
  - Data source:  `\gisrv100\regional\data\natural\flood\mtfldhaz polygon`
- Steep Slopes
  - Prohibitive status varies.
  - Empirical research required to look at historical effect of steep slopes in prohibiting or reducing residential, commercial and industrial development densities. Lots with steep slopes will prohibit or mitigate depending on findings.
  - Steep slopes will prohibit if no historical development has occurred on slopes of that percent or larger.
  - Slope Analysis Conclusions:
    - Slope levels above which each basic development type has not occurred historically (commercial includes mixed use):
      - Industrial: > 15% (most development occurs below 5%)
      - Commercial: > 30% (most development occurs below 10%)
      - Residential: > 30% (most development occurs below 25%)
    - Slopes higher than the thresholds listed above are considered effectively prohibitive.
    - Slopes at or below the thresholds listed above may reduce development capacity.
  - Regional 10-meter DEM is used.
  - Data source:  `\gisrv100\regional\data\elevation\lc_elev10`
- Riparian Corridors
• Eugene Goal 5 adopted areas are used.
  • Data source: \gisrv100\regional\data\natural\eug\Eug_Goal5\Sig_G5_riparian.shp.
  • Areas designated as “not protected” are not prohibitive.
  • Areas designated as “protected” are prohibitive.
  • Protected areas and buffer areas around them are prohibitive. Eugene staff have provided a conservation areas dataset to LCOG staff which represents significant effort to determine the best estimate of the proper buffers given the complexity of policy requirements and the accuracy of available hydro-morphological data.
  • Eugene waterside protection areas are also used, but are not available digitally, so estimated areas are used.
  • Estimation method: Identified waterways in the WP overlay zone are buffered per Eugene code requirements. Ordinary High Water buffers are used plus an estimate of the ordinary high water level based on the average width of the visible water bodies in 2008 aerial photography.
  • Reference: Summary of Waterside & Wetland Setbacks (Eugene PDD March 2007).
  • The water body centerlines are used.
  • Data source: \clsrv111\gis\projects\eugene\EugeneUrbanLandsAssessment\Data\Constraints\shapefiles\WEWrivers.shp.
  • The data used were created by extracting features from the city’s open water dataset. The WPBuffer field contains the buffers used and is equal to the OHWBuffer field value plus half the Width field value.
  • Data source: \clsrv111\gis\projects\eugene\EugeneUrbanLandsAssessment\Data\Constraints\shapefiles\WEWriversBuffers.shp.
  • Lane County Goal 5 adopted areas are also used.
  • Data source: \gisrv111\gis\projects\metro\goal5\safhbriparian.
  • All riparian features are prohibitive, but no buffers are applied.
  • All Lane County Goal 5 features are outside the UGB and will not affect the BLI results. They are included for future model flexibility.

• Wetlands
  • Eugene Goal 5 adopted areas are used.
  • Data source: \gisrv100\regional\data\natural\eug\Eug_Goal5\Sig_G5_wetlands.shp.
  • Protected areas and buffer areas around them are prohibitive. Eugene staff have provided a conservation areas dataset to LCOG staff which represents significant effort to determine the best estimate of the proper buffers given the complexity of policy requirements and the accuracy of available hydro-morphological data.
  • West Eugene Wetlands permanent public ownership taxlots are also used.
  • Data source: \gisrv100\regional\data\natural\eug\Wetland\wewowner.
  • West Eugene Wetlands wetland features are also used.
  • Data source: \gisrv100\regional\data\natural\eug\Wetland\wetlands polygon.
  • Eugene staff have indicated the constraint status of areas of the wetlands in the WEW inventory as follows:
    • Areas designated as “Protect” or “Restore” are prohibitive.
    • All other categories are not prohibitive.
  • Wetlands are buffered according to value per Eugene code requirements. The following buffers are used:
• High Value, Enhanced: 50’
• Medium Value, Enhanced: 25’
• Lower Value: 0’ (no buffer outside wetland boundary)
  o The “Enhanced” buffers are used on the assumption (supported by Eugene staff) that developers generally opt for this option to maximize their developable land area.
  o Lane County Goal 5 adopted areas are also used.
  o Data source:  \gisrv111\gis\projects\metro\goal\5\met_nwi_x_ugb.
  o All wetland features (excluding those where ATTRIBUTE = ’’ or ATTRIBUTE = ’U’) are prohibitive, but no buffers are applied.
  o All Lane County Goal 5 features are outside the UGB and will not affect the BLI results. They are included for future model flexibility.

• Wildlife Habitat
  o Eugene and Lane County Goal 5 adopted areas are used.
  o Data source:  \gisrv100\regional\data\natural\eug\Eug_Goal5\Sig_G5_uplands.shp.
  o Protected areas and buffer areas around them are prohibitive. Eugene staff have provided a conservation areas dataset to LCOG staff which represents significant effort to determine the best estimate of the proper buffers given the complexity of policy requirements and the accuracy of available hydro-morphological data.
  o Critical habitat zones of federally listed, threatened and endangered species are also included in the model and are considered prohibitive. Five species were found to be present in the study area:
    • Butterfly, Fender’s blue (Icaricia icarioides fenderi)
    • Daisy, Willamette (Erigeron decumbens var. decumbens)
    • Lupine, Kincaid’s (Lupinus sulphureus (=oreganus) ssp. kincaidii (=var. kincaidii))
    • Salmon, chinook (Oncorhynchus (=Salmo) tshawytscha)
    • Trout, bull (Salvelinus confluentus)
  o Bull Trout and Chinook Salmon habitats are protected by the other protections for the Willamette River and so have not been added to the model as separate layers. The other habitats have been added.
  o This data was acquired by LCOG staff from the USFWS Critical habitat Portal (http://crithab.fws.gov/) and is now available to the region.
  o Data Source:  \gisrv100\regional\data\natural\tandespecies\crithab.

• Historic and Cultural Resources
  o Specified as prohibitive by Eugene staff.
  o Based on a spreadsheet provided by Eugene staff (Ken Guzowski) which identifies a list of properties that are listed as a City Landmark, National Register, or Primary Ranked Cultural Resource.
  o Data Source:  \gisrv100\regional\data\parcel\eug\histsite1 polygon.

• Parks
  o Specified as prohibitive by Eugene staff (except surplus).
  o Regional park areas are prohibitive.
  o Data Source:  \clsrv111\gis\projects\eugene\EugeneUrbanLandsAssessment\Data\Constrains\parks.
  o City and County agency staff were consulted to determine if lots will be held/acquired (constrained) or surplusd (not constrained). No lots were identified for either disposition.
State and Federal properties are considered prohibitive. No surplus is expected.

**Government Property**
- Specified as prohibitive by Eugene staff (except surplus).
- Taxlot tax exempt status data is used to identify these areas.
- City and County agency staff were consulted to determine if lots will be held/acquired or surplused. No lots were identified for either disposition.
- State and Federal properties are considered prohibitive. No surplus is expected.

**School Property**
- Specified as prohibitive by Eugene staff (except surplus).
- Taxlot exempt status data is used to identify these areas.
- School district (4J and Bethel) staff were consulted to determine if lots will be held/acquired (constrained) or surplused (not constrained).
- District 4J staff identified 4 sites that “the District may sell, trade, or lease these properties at some time in the future”. They are:
  - **Developed Sites:**
    - Dunn / Opportunity Center (4.5 acres)
    - Bailey Hill (5.6 acres)
    - Civic Stadium (9.8 acres)
  - **Developable Sites:**
    - Coburg Farm (28.0 acres)
- Bethel staff identified no plans to surplus any sites, but identified a future need for 120 acres of acquisitions.

**Charitable Property**
- Specified as not prohibitive by Eugene staff (except cemeteries).
- Taxlot exempt status data is used to identify these areas.

**Utility Property**
- Specified as prohibitive by Eugene staff (except surplus).
- Taxlot exempt status data is used to identify these areas.
- EWEB staff were consulted to determine if lots will be held/acquired or surplused. No lots were identified for either disposition, but EWEB staff have said “while no EWEB property has been formally declared as surplus property, it is likely that in the next 20 years, there will be approximately 15 acres of property available for redevelopment.”

**Transportation Rights-of-Way**
- Specified as prohibitive by Eugene staff (except surplus).
- Land use and taxlot data are used to identify these areas.
- Rail rights-of-way are considered committed and so prohibitive. No surplus is expected. The rail yards are considered committed also.
- City and County agency staff were consulted to determine if lots will be held, acquired or surplused. LCOG will make contact with these parties. No lots were identified for either disposition.
- State and Federal properties are considered prohibitive. No surplus is expected.

**Plan Designations**
- All except NR specified as not prohibitive by Eugene staff.
- Data source: `\gisrv100\regional\data\boundary\plans\mtpds polygon.`
B. Non-Prohibitive Constraints (May Affect Capacity)

- **Earthquakes and Related Hazards**
  - Specified as not prohibitive by Eugene staff.

- **Landslides**
  - Specified as not prohibitive by Eugene staff.
  - DOGAMI identified slide areas are available, but were not used. It was felt this data was not of sufficient resolution to clearly identify any areas that were prohibitive constraints.
  - Data source: `\clsrv111\gis\projects\eugene\EugeneUrbanLandsAssessment\Data\dogami_slides\IMS14_plus_IMS24.shp`.
  - Sources: Oregon Department of Geology and Mineral Industries (DOGAMI) Interpretive Map Series IMS-14, 2000; DOGAMI Interpretive Map Series IMS-24, 2008.

- **LWI Wetlands**
  - Specified as not prohibitive by Eugene staff. City staff is of the opinion that designation as an LWI wetland (that is, a wetland that is not Goal 5 protected) is not a prohibitive constraint. Permits are offered to fill, remove and/or mitigate these areas with a fair degree of regularity.

- **Wildfires**
  - Specified as not prohibitive by Eugene staff.

- **Energy Sources**
  - Specified as not prohibitive by Eugene staff.

- **Scenic Views and Sites**
  - Specified as not prohibitive by Eugene staff.

- **Willamette River Greenway**
  - Specified as not prohibitive by Eugene staff.
  - May affect capacity.
  - Data source: `\gisrv100\regional\data\boundary\districts\greenway polygon`.

- **Approved Oregon (ORT) and National (NRT) Recreation Trails**
  - Specified as not prohibitive by Eugene staff.
  - The Ridgeline Trail area qualifies, but is not prohibitive by itself. Eugene may acquire lands for public ownership, but that falls under a different constraint category (see Open Space).

- **Special Districts**
  - Specified as not prohibitive by Eugene staff.

- **Brownfields**
  - Specified as not prohibitive by Eugene staff.

- **Subdivisions with CC&Rs**
  - Specified as not prohibitive by Eugene staff. Eugene staff finding is that there is no efficient or effective way to categorize or quantify the hundreds of CC&Rs and their impact on development. Additionally, the fact that they are civil in nature rather than part of the city code, means their legality (and thus their prohibitiveness) is not determinate. Research using a sampling method has been performed by City staff and some larger subdivisions have been found to have CC&Rs that may preclude capacity (i.e. infill) if found to be legally binding.
C. Constraints Not Present
   - Federal Wild and Scenic Rivers (WSR)
     - Confirmed not present by Eugene staff.
   - Oregon Scenic Waterways (OSW)
     - Confirmed not present by Eugene staff.
   - Groundwater Resources
     - Confirmed not present by Eugene staff.
   - Natural Areas (Natural Heritage Resources)
     - Confirmed not present by Eugene staff.
   - Wilderness Areas (Federal)
     - Confirmed not present by Eugene staff.
   - Areas Unserviceable Within the Planning Period
     - Confirmed not present by Eugene staff.

Land Supply (Phase 3)
Phase 3 datasets are entirely derived from the output datasets of Phase 1 and Phase 2.
Appendix A.6 GIS Processing Framework

Overview

Buildable land analysis studies are conducted to comply with statewide planning goals and to determine whether the jurisdiction has a 20-year land supply within its urban growth boundary (UGB). A buildable lands inventory addresses only the supply component.

In general, ECLA contains a supply analysis (developable and redevelopable land by plan designation) and a demand analysis (population and employment growth leading to demand for more built space: residential and non-residential development).

The primary purpose of the ECLA buildable lands inventory (BLI) is to assess the existing supply of lands within the City of Eugene’s current UGB. The inventory provides a portion of the information needed to determine whether the UGB contains enough buildable land supply to accommodate projections of the 20-year housing and employment lands.

The primary question that the buildable land inventory analysis will answer is: What is the existing buildable land supply within the Eugene UGB? Secondarily, the ECLA BLI database generated will also provide the data necessary to evaluate the supply of other needed lands. The buildable lands portion of ECLA summarizes the gross acreage. A residential capacity analysis (presented in the Housing Needs Analysis) assesses the net acreage (net acreage is gross acreage minus a proportion for supporting uses).

While the inventory of buildable lands is based on a parcel-level inventory of buildable potential, it is not to be regarded as a parcel-level analysis of lot suitability or availability. It does not assess all factors relevant to determining the suitability or availability of any particular lot for development or redevelopment, many of which simply cannot be known with any certainty over the 20-year planning horizon. The results of the inventory are aggregated by plan designation and are intended to be regarded as reasonably accurate only in the aggregate.

The BLI analysis has three phases as depicted in Figure A.3-1.
The following briefly describes these analysis phases:

**Phase 1. Assemble the land base:** The first analytical step in a buildable lands analysis is to assemble the land base that will be used. This combines policy boundaries such as plan designation, zoning and the UGB with current land characteristics from regional land use and tax lot databases. Issues with boundary alignments were resolved in this phase based on direction from City of Eugene staff.

**Phase 2. Identify limiting factors (constraints):** The second step in identifying buildable lands is identifying lands that have physical or policy constraints or other factors that preclude development or limit development capacity. The data for this step are collected from a variety of sources including the regional land information database (RLID) and other data provided by the city and other agencies.

**Phase 3. Classify and inventory lands:** The classification of each tax lot into a set of mutually exclusive categories of Vacant and Developed in one dimension (presence of improvements), and Committed, Protected, Partially Constrained, and Unconstrained in a second dimension (limiting factors). See Figure A.3-2, Land Development Capacity Matrix, for a depiction of these dimensions and their relationships.

In Figure A.3-2, the factors described in Phase 2 as limiting development capacity are listed down the left side of the matrix. Categories based on presence of improvements (development) identified in Phase 3 are listed across the top. All
lands in the UGB are classified into mutually exclusive categories by these two dimensions.

**Figure A.3-2: Land Development Status Matrix**

<table>
<thead>
<tr>
<th>Constraining Conditions</th>
<th>Presence of Improvements</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Developable</td>
</tr>
<tr>
<td>Prohibitively Constrained</td>
<td>Committed</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Protected</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Partially Constrained</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Partial development potential</td>
</tr>
<tr>
<td>Unconstrained</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Full development potential</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Potential redevelopment</td>
</tr>
</tbody>
</table>

The shaded area of the matrix represents 100% of all acres in the UGB. Grey cells in the matrix indicate non-buildable land classes that have no development capacity. These are lands committed to public or semi-public uses, protected, or fully developed and not likely to redevelop during the planning period.

Green cells in the matrix (in the lower left) indicate buildable land classes that have some development capacity. These are developable (vacant) or redevelopable lands that have some or no capacity limitations.

This matrix does not consider tax lot boundaries. When applied to the ECLA BLI GIS model, for example, tax lots may have lands in one or more of the categories shown in the matrix.
GIS Implementation

Geographic information systems (GIS) tools are the key technology used in performing the work in these phases. Each phase results in the creation of file-based geodatabases (.mdb and .gdb) and datasets. Figure A.3-3 shows the data flow of the analysis.

**Figure A.3-3: BLI Analysis Data Flow**

ECLA Supply-Side (BLI) Databases
The datasets in these databases are linked together by the geoprocessing models which create and modify them. These geoprocessing models are created in Model Builder, a component of the ESRI ArcGIS 9.3 software.

The final output of Phase 3 is a spatial land supply database containing land characteristics from which the summary report of land development capacity by plan designation and the inventory maps are derived. The resulting “Analysis Fabric” database contains many attributes for each unit of analysis. The attributes are accumulated in each analysis phase and consist of the following categories:

**Phase 1**
- Geometry (ID, shape, acres)
- Land Use (type, dwelling units)
- Tax Lot (prop class, stat class, ownership, assessed value, etc.)
- Zoning
- Plan Designation

**Phase 2**
- Constraint Flags

**Phase 3**
- Development Potential Flag

Figure A.3-4 depicts the schematic structure of the land supply database (Development potential flag field is not shown, but would appear at the far right). This database represents the spatial permutation of these attributes. Figure A.3-5 depicts some attribute “cross-sections” of the database.

This spatial permutation structure makes it a highly flexible starting point which can support many kinds of analysis. Other parts of ECLA and other later analyses can be performed using this database.
**Figure A.3-4: Land Supply Attributes**

<table>
<thead>
<tr>
<th>Feature Attributes</th>
<th>Land Use Attributes</th>
<th>Taxlot Attributes</th>
<th>Zoning &amp; Plan Designation Attributes</th>
<th>Constraint Flags</th>
</tr>
</thead>
<tbody>
<tr>
<td>PID</td>
<td>geom</td>
<td></td>
<td></td>
<td></td>
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</tbody>
</table>

**Figure A.3-5: Land Supply Permutations**

- **Showing Land Use**
- **Showing Zoning**
- **Showing Plan Designation**
- **Showing Limiting Factors**
This appendix presents a pre-policy draft economic opportunities analysis (EOA) for the City of Eugene. It is part of a larger project to determine whether Eugene has enough land to accommodate growth over the next 20 years. The estimate of land need presented in this appendix is a pre-policy estimate and will be revised based on feedback from the City Council about economic development policies and City Staff’s work on land use efficiency measures.

This appendix provides a baseline estimate of employment land needs based on assumptions about the amount of employment growth that will require new land, employment densities, and land need by site size. This appendix provides a demand-based approach to estimating employment land needs, which projects employment land need based predominantly on the forecast of employment growth, using recent employment densities (e.g., the number of employees per acre) to estimate future commercial and industrial land demand.

Goal 9 requires cities to state objectives for economic development (OAR 660-009-0020(1)(a)) and to identify the characteristics of sites needed to accommodate industrial and other employment uses to implement the economic development objectives (OAR 660-009-0025(1)). This approach could be characterized as a site-based approach, which projects land need based on the City’s economic development objectives, target industries, and forecasts for employment growth.

The City of Eugene has not stated objectives for economic development, making it very difficult to identify the characteristics of sites needed to implement the economic development objectives. When Eugene decisionmakers develop this statement of economic development objectives, the analysis of commercial and industrial land demand may change, possibly substantially, to implement the economic development objectives and the potential for larger site needs through a site-based approach to completing the EOA.

B.1 INTRODUCTION

This report presents an Economic Opportunities Analysis (EOA) for the City of Eugene consistent with the requirements of statewide planning Goal 9 and the Goal 9 administrative rule (OAR 660-009-0015). Goal 9 describes the EOA as “an analysis of the community’s economic patterns, potentialities, strengths, and deficiencies as they relate to state and
national trends” and states that “a principal determinant in planning for major industrial and commercial developments should be the comparative advantage of the region within which the developments would be located.”

**B.1.1 BACKGROUND**

In 2007, the Oregon Legislature passed House Bill 3337 which directs Eugene to establish a separate Urban Growth Boundary (UGB). House Bill 3337 requires that Eugene establish a UGB and “demonstrate, as required by ORS 197.296, that its comprehensive plan provides sufficient buildable lands within an urban growth boundary established pursuant to statewide planning goals to accommodate estimated housing needs for 20 years.”1 The Eugene City Council expanded the analysis to look not just at residential land, but at employment land as well.

The City of Eugene contracted with ECONorthwest to complete an economic opportunities analysis to determine sufficiency of employment land within the Eugene UGB. This appendix presents the results of the economic opportunities analysis.

ECONorthwest worked closely with City staff, a Community Advisory Committee (CAC), and Technical Advisory Committee (TAC) in preparing the Eugene Economic Opportunities Analysis. This report incorporates many comments provided by these groups.

**B.1.2 ORGANIZATION OF THIS APPENDIX**

The remainder of this report is organized as follows:

- **B.2 Framework for Economic Development** presents the methods used to determine employment land sufficiency in Eugene.


- **B.4. Factors Affecting Future Economic Growth in Eugene** summarizes Eugene’s competitive advantages formed by the mix of factors present in Eugene.

- **B.5. Employment Growth and Target Industries** in Eugene presents a forecast for employment growth and an analysis of the types of firms that are likely to locate in Eugene.

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1 House Bill 3337 was codified in ORS 197.304. Emphasis added.
• **B.6. Land Demand and Site Needs in Eugene** estimates the amount of commercial and industrial land that will be needed over the next 20 years.
B.2 FRAMEWORK FOR ECONOMIC DEVELOPMENT

The purpose of the economic opportunities analysis (EOA) was to determine if there is enough land inside the City’s UGB to support economic growth over a 20-year planning period based on application of recent trends. To make this determination, the City must assess how much and what types of economic growth may occur in Eugene.

B.2.1 FRAMEWORK FOR DETERMINING WHETHER EMPLOYMENT LAND IS SUFFICIENT (STATE REQUIREMENTS)

The assessment in this project of Eugene’s employment land is designed to meet the requirements of Oregon Statewide Planning Goal 9 and the administrative rule that implements it (Oregon Administrative Rule (OAR) 660-009). The intents of Goal 9 are: (1) to “provide an adequate land supply for economic development and economic growth in Oregon”; (2) to link planning for an adequate land supply to planning for development of infrastructure and community development; and (3) to assure that comprehensive plan policies and land-use regulations are updated and provide economic opportunities throughout the State and are based on analysis of economic trends.²

To satisfy the requirements of Goal 9, the State requires a city determine whether the employment land in its UGB (land supply) can accommodate the employment growth forecasted for a 20-year planning period (land demand, or need). If not, a city must take steps to increase land-use efficiency or it must expand the UGB to provide more employment land.³

In the context of Goal 9, the measure of employment land is “sites” needed for employment uses. A site is a parcel or group of parcels of land designated for uses that accommodate employment. Cities will have need for a variety of site types, sizes, and locations based on the amount and type of employment growth expected. Sites have varying characteristics, such as size, location, or topography, and may be suited to meet the land need for one or more types of employment.

Eugene’s assessment of employment land and site needs are based on these requirements to the degree possible in the absence of a statement of economic development objectives. The key results of the assessment are: (1) an inventory of Eugene’s employment land, (2) an estimate of the

² OAR 660-009-0000

³ The Eugene Comprehensive Land Assessment project will end at the determination of land sufficiency. It will not consider potential land-use efficiency measures or UGB expansion.
number of sites needed for employment uses over the 20-year planning period and a factual basis supporting this estimate, and (3) a comparison of the supply of and the need for employment sites with a conclusion about whether Eugene has enough land for employment uses.

Figure B-1 shows the process for determining whether Eugene has enough employment land. The steps shown in Figure B-1 correspond to the process for conducting the assessment that follows.

**Figure B-1. Process for assessing the sufficiency of employment land**

The steps in this assessment are:

1. **Inventory of employment land.** Cities are required to develop an inventory of vacant and developed lands within the planning area designated for industrial or other employment use (OAR 660-009-0015(3)). This inventory was produced as part of the buildable lands inventory (BLI). The methods and legal context for the BLI
are described in other documents. The inventory of buildable employment land was further analyzed to describe:

A) **Identify vacant buildable employment land.** The inventory identified vacant buildable employment land, which is land that is vacant and does not have constraints that prohibit development. The methods for identifying vacant buildable employment land are described in other documents.

B) **Describe characteristics of vacant employment land (OAR 660-009-0015(3)(a)).** The inventory described characteristics of vacant employment land, such as: amount, location, plan designation; and size.

C) **Identify the short-term supply of employment land (OAR 660-009-0015(3)(a)(C)).** The inventory of employment land approximated total acreage and percentage of sites that comprise the short-term supply of land. Cities may consider the availability of land when determining the short-term supply of land, such as whether the land is likely to be on the market for sale or lease at market prices during the planning period (OAR 660-009-0025(7)).

**Identifying the short-term supply of employment land will be completed as part of Envision Eugene.**

2. **Economic Opportunities Analysis (EOA).** OAR 660-009 requires that cities conduct an economic opportunities analysis (described in OAR 660-009-0015) to determine the city’s land need. OAR 660-009 discusses employment land need in the context of how many employment sites the city needs. This analysis has the following steps:

A) **Analyze Economic Trends (OAR 660-09-0015(1)).** Cities are required to review national, state, regional, county and local trends to identify the major categories of industrial or other employment uses that could reasonably be expected to locate or expand in the Urban Growth Boundary (UGB).

B) **Assess Comparative Advantages (OAR 660-09-0015(4)).** Cities are required to estimate the type and amount of employment uses likely to occur in the UGB. The assessment must consider the city’s economic advantages and disadvantages, including: location, city size, buying power of markets, availability of transportation facilities, public facilities and services, labor market factors, access to suppliers and utilities, access to necessary support services,
limits on development due to environmental protection laws, and educational and technical training programs.

C) **Forecast Employment Growth (OAR 660-09-0015(1)).** The next step in determining demand for employment land is to forecast employment growth, based on economic trends, current and historical conditions, comparative advantages, likely growth industries, and regional forecast of employment growth.

D) **Identify Required Sites (OAR 660-09-0015(2)).** The final step in the EOA is to identify the number of sites by type reasonably expected to be needed to accommodate the forecast of employment growth. According to OAR 660-009-0005(11), identification of required sites should consider the characteristics of the needed sites, such as: site size, site configuration, topography, visibility, need for specialized services or infrastructure, or proximity to needed transportation.

This project identified required sites based on the demand-based analysis in this report. The identification of required sites could change based on the economic development objectives developed by the City through Envision Eugene.

3. **Economic development objectives.** Cities with a population over 2,500 are required to articulate economic development objectives and to develop commercial and industrial development policies based on the EOA (OAR 660-009-0020). Local comprehensive plans must state the overall objectives for economic development in the planning area and identify categories or particular types of employment uses desired by the community. Local comprehensive plans must also include policies that commit the city or county to designate an adequate number of employment sites of suitable sizes, types and locations. The plan must also include policies to provide necessary public facilities and transportation facilities for the planning area. Finally, cities within a Metropolitan Planning Organization (which includes Eugene) must adopt policies that identify a competitive short-term supply of land for desired employment uses as an economic development objective.

4. **Land needs based on site needs.** Cities must estimate employment land needs based on the identification of required sites developed in the EOA. The estimate of site needs should be consistent with the city’s economic development objectives and policies.
This project does not include an evaluation of whether the site needs are consistent with the economic development objectives and policies because those policies have not yet been articulated.

5. **Employment land sufficiency.** Cities must compare the need for employment sites developed in the EOA (Step 4) with the inventory of buildable vacant employment sites (Step 1) (OAR 660-009-0020(2)). Cities may consider employment uses with special siting characteristics based on adopted employment objectives or policies. Special siting characteristics may include: large acreage sites, special site configurations, direct access to transportation facilities, prime industrial lands, or sensitivity to adjacent land uses.

6. **Adoption of economic development policies.** Cities are required to adopt measures to implement policies adopted pursuant to OAR 660-009-0020. Appropriate implementation measures include amendments to plan and zone map designations, land use regulations, public facility plans, and transportation system plans. More specifically, plans must identify the approximate number, acreage and characteristics of sites needed to accommodate employment uses to implement plan policies, and must designate serviceable land suitable to meet identified site needs.

This project does not include adopting measures to implement economic development policies.

7. **Designation of lands for industrial and commercial uses.** Plans for cities and counties within a Metropolitan Planning Organization or cities and counties that adopt policies relating to the short-term supply of land must designate suitable land to respond to economic development opportunities as they arise (OAR 660-009-0025).

This project does not include designation of new lands for industrial and commercial uses.

**Determining whether employment land in Eugene is sufficient**

The preceding sections discussed the key factors that affect economic development and the State’s process for determining whether a city has enough land to accommodate 20-years worth of economic growth. This section applies that information to the situation in Eugene, identifying key issues and describing how they were addressed in the assessment.

**Key Issues**

Eugene does not have a recently updated economic development policy document that describes the City’s economic development policies. Determining whether Eugene has enough land to accommodate expected
employment needs during the 20-year planning period is difficult without this policy direction. The key issues for determining employment land need are:

- **Eugene does not have clear economic development objectives.** One of the steps in assessing a city’s employment land supply is to clearly articulate the city’s economic development objectives. OAR 660-009 encourages cities to develop economic development objectives through a public process, such as a visioning process. Eugene does not have an existing economic development policy document or plan that articulates the City’s economic development objectives. City staff summarized existing economic development policies in the memorandum “Existing Policies Used by the City of Eugene to Guide Growth: A Primer” (dated November 10, 2008).

- **Does Eugene want to attract large employers that require large sites?** The lack of clear economic development objectives makes this question hard to answer. Goal 9 allows cities to be “aspirational” in local economic development plans. A city can adopt policies to attempt to attract specific types of firms, including types of firms that have not historically located in the city. Many cities aspire to attract major employers that require large sites (e.g., sites larger than 50 acres). Goal 9 allows a city to increase the amount of their buildable lands for employment beyond what might be calculated to strictly match forecasted employment if it demonstrates that it lacks certain need site types. Such an action, though allowed, is optional: a city must decide that it wants to have the additional site types so as to have a chance of attracting such industries. Such decisions are typically found in a city’s economic development plan or plan element. Since Eugene does not have clearly articulated economic development objectives, particularly objectives pertaining to sites, the EOA at this point assumes that Eugene does not want to attract large employers that require large sites.

- **How much new employment will locate on non-employment land or on land that is already developed?** Not all new employment will require vacant employment land. There are three typical circumstances under which new employment does not require additional employment land; new employment may be accommodated (1) on land that is not designated primarily for employment uses: e.g., home occupations that are located in residential plan designations; (2) in existing built space (e.g., adding a new cubicle to an existing office, or by extending the hours of operation); and (3) on developed land that gets
redeveloped at a higher density.

The EOA makes assumptions about the amount of new employment that will not require land classified as vacant, based on existing policies and through empirical analysis where available. Assumptions about the amount of employment that will be accommodated on land not classified as vacant (which is primarily developed land, so such accommodation would be classified primarily as redevelopment) are policy choices that are subject to change at the direction of Eugene’s decision makers.
Methods

The specific methods used in this project to determine the sufficiency of employment land in the Eugene UGB are consistent with the framework described above and meet the requirements of Goal 9 and OAR 660-009. Not all of the requirements of Goal 9 were met as part of this study (the exceptions are noted):

1. **Inventory of employment land.** The consulting team completed the inventory of employment land and identified vacant buildable employment land. This step involved

   A) *Describing the site characteristics of vacant buildable employment land.* This step involved grouping vacant buildable employment land by size of sites, from small sites (those ¼ acre and smaller) to large sites (those 50 acres and larger). For sites larger than 10 acres, we considered employment capacity based on site characteristics, such as topography or location. We focused on these larger sites because they are relatively rare within the UGB and are the types of sites that may accommodate large firms and greater numbers of employees.

   B) *Identify the short-term supply of employment land.* City planning and public works staff are working to identify the short-term supply of employment land based on an assessment of infrastructure availability. Staff will consider land availability (e.g., whether the owner may be willing to sell at market price) when determining the short-term supply of land.

2. **Economic Opportunity Analysis.** We conducted an EOA based on the requirements of OAR 660-009-0015. The EOA includes the following tasks:

   A) *Analyze economic trends.* We reviewed trends that may affect economic development in Eugene over the 20-year period.

   B) *Assess comparative advantages.* We assessed Eugene’s comparative advantages relative to other communities in the Southern Willamette Valley.

   C) *Forecast employment growth.* Forecasting Eugene’s employment growth required that we estimate the number of employees and firms in Eugene now, and that we assume a rate of future employment growth. The estimate of the number of employees and firms in Eugene was based on confidential employment data from the State, which is
available for 2006. We assumed that employment in Eugene will grow at the same rate as the State has forecast for employment to grow in Lane County.4

D) Identify required sites. We described the characteristics of required employment sites based the type and amount of employment in each category of employment.

3. Economic development objectives. The memorandum “Existing Policies Used by the City of Eugene to Guide Growth: A Primer” (dated November 10, 2008) presented the economic development objectives and policies that guide economic development in the City of Eugene. We used the economic development objectives and policies in these existing documents in place of a newly developed economic development strategy.

4. Land needs based on site needs. We developed a “baseline” analysis of employment land needs that extrapolated from recent trends, using the employment forecast and identification of required sites to estimate site needs. Since the City of Eugene does not have clearly articulated economic development objectives, the estimate of land need was based on our interpretation of the objectives that do exist, and on the existing use of employment land.

5. Employment land sufficiency. We compared the number of buildable vacant sites in the inventory with the estimate of land and site needs to determine whether Eugene has enough employment land for the 20-year planning period.

6. Adoption of economic development policies. Not part of this project.

7. Designation of lands for industrial and commercial uses. Not part of this project.

4 This assumption is based on the “safe harbor” in OAR 660-024-0040(8)(a). A safe harbor is an assumption that a local government may use to satisfy the requirements of Goals 9, 10, or 14. The State will accept analysis based on a safe harbor assumption without findings to support the assumption.
B.2.2 FACTORS THAT AFFECT ECONOMIC DEVELOPMENT

The fundamental purpose of Goal 9 is to make sure that a local government plans for economic development. The planning literature provides many definitions of economic development, both broad and narrow. Broadly,

“Economic development is the process of improving a community’s well-being through job creation, business growth, and income growth (factors that are typical and reasonable focus of economic development policy), as well as through improvements to the wider social and natural environment that strengthen the economy.”

That definition acknowledges that a community’s well-being depends in part on narrower measures of economic well-being (e.g., jobs and income) and on other aspects of quality of life (e.g., the social and natural environment).

In practice, cities and regions trying to prepare an economic development strategy typically use a narrower definition of economic development: they take it to mean business development, job growth, and job opportunity. The assumptions are that:

- Business and job growth are contributors to and consistent with economic development, increased income, and increased economic welfare.

- The evaluation of tradeoffs and balancing of policies to decide whether such growth is likely to lead to overall gains in well-being (on average and across all citizens and businesses in a jurisdiction, and all aspects of well-being) is something that decision makers do after an economic strategy has been presented to them for consideration.

That logic is consistent with the tenet of the Oregon land-use planning program: that all goals matter, no goal dominates, and the challenge is to find a balance of conservation and development that is acceptable to a local government and state. Goal 9 does not dominate, but it legitimizes and requires that a local government focus on the narrower view of economic development: the one that focuses on economic variables.

In that context, a major part of local economic development policy is about local support for business development and job growth; that growth comes from the creation of new firms, the expansion of existing firms, and the relocation or retention of existing firms. Thus, a key question for economic development policy is, *What are the factors that influence business and job growth, and what is the relative importance of each?* This appendix addresses that question in depth.6

**What factors matter?**

Why do firms locate where they do? There is no single answer—different firms choose their locations for different reasons. Key determinates of a location decision are a firm’s *factors of production*. For example, a firm that spends a large portion of total costs on unskilled labor will be drawn to locations where labor is relatively inexpensive. A firm with large energy demands will give more weight to locations where energy is relatively inexpensive. In general, firms choose locations they believe will allow them to maximize net revenues: if demand for goods and services are held roughly constant, then revenue maximization is approximated by cost minimization.

The typical categories that economists use to describe a firm’s production function are:

- **Labor.** Labor is often and increasingly the most important factor of production. Other things equal, firms look at productivity — labor output per dollar. Productivity can decrease if certain types of labor are in short supply, which increases the costs by requiring either more pay to acquire the labor that is available, the recruiting of labor from other areas, or the use of the less productive labor that is available locally.

- **Land.** Demand for land depends on the type of firm. Manufacturing firms need more space and tend to prefer suburban locations where land is relatively less expensive and less difficult to develop. Warehousing and distribution firms need to locate close to interstate highways.

- **Local infrastructure.** An important role of government is to increase economic capacity by improving quality and efficiency of infrastructure and facilities, such as roads, bridges, water and

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6 The information in this appendix is based on previous Goal 9 studies conducted by ECONorthwest and the following publication: *An Economic Development Toolbox: Strategies and Methods*, Terry Moore, Stuart Meck, and James Ebenhoh, American Planning Association, Planning Advisory Service Report Number 541, October 2006.
sewer systems, airport and cargo facilities, energy systems, and telecommunications.

- **Access to markets.** Though part of infrastructure, transportation merits special attention. Firms need to move their product, either goods or services, to the market, and they rely on access to different modes of transportation to do this. While transportation has become relatively inexpensive compared to other inputs, and transportation costs have become a less important location factor, access to transportation is still critical. That long-run trend, however, could shift because of decreasing funds to highway construction, increasing congestion, and increasing energy prices.

- **Materials.** Firms producing goods, and even firms producing services, need various materials to develop products that they can sell. Some firms need natural resources: lumber manufacturing requires trees. Or, farther down the line, firms may need intermediate materials: for example, dimensioned lumber to build manufactured housing.

- **Entrepreneurship.** This input to production may be thought of as good management, or even more broadly as a spirit of innovation, optimism, and ambition that distinguishes one firm from another even though most of their other factor inputs may be quite similar.

The supply, cost, and quality of any of these factors obviously depend on market factors: on conditions of supply and demand locally, nationally, and even globally. But they also depend on public policy. In general, public policy can affect these factors of production through:

- **Regulation.** Regulations protect the health and safety of a community and help maintain the quality of life. Overly burdensome regulations, however, can be disincentives for businesses to locate in a community. Simplified bureaucracies and straightforward regulations can reduce the burden on businesses and help them react quickly in a competitive marketplace.

- **Taxes.** Firms tend to seek locations where they can optimize their after-tax profits. Studies show that tax rates are not a primary location factor—they matter only after businesses have made decisions based on labor, transportation, raw materials, and capital costs. The costs of these production factors are usually similar within a region. Therefore, differences in tax levels across communities within a region are more important
in the location decision than are differences in tax levels between regions.

- **Financial incentives.** Governments can offer firms incentives to encourage growth. Studies have shown that most types of financial incentives have had little significant effect on firm location between regions. For manufacturing industries with significant equipment costs, however, property or investment tax credit or abatement incentives can play a significant role in location decisions. Incentives are more effective at redirecting growth within a region than they are at providing a competitive advantage between regions.

This discussion may make it appear that a location decision is based entirely on a straight-forward accounting of costs, with the best location being the one with the lowest level of overall costs. Studies of economic development, however, have shown that location decisions depend on a variety of other factors that indirectly affect costs of production. These indirect factors include agglomerative economies (also known as industry clusters), quality of life, and innovative capacity.

- **Industry clusters.** Firms with similar business activities can realize operational savings when they congregate in a single location or region. Clustering can reduce costs by creating economies of scale for suppliers. For this reason, firms tend to locate in areas where there is already a presence of other firms engaged in similar or related activities.

- **Quality of life.** A community that features many quality amenities, such as access to recreational opportunities, culture, low crime, good schools, affordable housing, and a clean environment can attract people simply because it is a nice place to be. A region’s quality of life can attract skilled workers, and if the amenities lure enough potential workers to the region, the excess labor supply pushes their wages down so that firms in the region can find skilled labor for a relatively low cost. The characteristics of local communities can affect the distribution of economic development within a region, with different communities appealing to different types of workers and business owners. Sometimes location decisions by business owners are based on an emotional or historical attachment to a place or set of amenities, without much regard for the cost of other factors of production.

- **Innovative capacity.** Increasing evidence suggests that a culture promoting innovation, creativity, flexibility, and adaptability is essential to keeping U.S. cities economically vital and
internationally competitive. Innovation is particularly important in industries that require an educated workforce. High-tech companies need to have access to new ideas typically associated with a university or research institute. Innovation affects both the overall level and type of economic development in a region. Government can be a key part of a community’s innovative culture, through the provision of services and regulation of development and business activities that are responsive to the changing needs of business.

**How important are these factors?**

To understand how changes in public policies affect local job growth, economists have attempted to identify the importance for firms of different locational factors. They have used statistical models, surveys, and case studies to examine detailed data on the key factors that enter the business location decision.

Economic theory says that firms locate where they can reduce the costs of their factors of production (assuming demand for products and any other factors are held constant). Firms locate in regions where they have access to inputs that meet their quality standards, at a relatively low cost. Because firms are different, the relative importance of different factors of production varies both across industries and, even more importantly, across firms.

No empirical analysis can completely quantify firm location factors because numerous methodological problems make any analysis difficult. For example, some would argue simplistically that firms will prefer locating in a region with a low tax rate to reduce tax expenses. However, the real issue is the value provided by the community for the taxes collected. Because taxes fund public infrastructure that firms need, such as roads, water, and sewer systems, regions with low tax rates may end up with poor infrastructure, making it less attractive to firms. When competing jurisdictions have roughly comparable public services (type, cost, and quality) and quality of life, then tax rates (and tax breaks) can make a difference.

Further complicating any analysis is the fact that many researchers have used public expenditures as a proxy for infrastructure quality. But large expenditures on roads do not necessarily equal a quality road system. It is possible that the money has been spent ineffectively and the road system is in poor condition.
An important aspect of this discussion is that the business function at a location matters more than a firm’s industry. A single company may have offices spread across cities, with headquarters located in a cosmopolitan metropolitan area, the research and development divisions located near a concentration of universities, the back office in a suburban location, and manufacturing and distribution located in areas with cheap land and good interstate access.

Although empirical analyses face many such methodological difficulties, the studies provide much information about why firms locate where they do. Economists have improved their statistical techniques and use a variety of data sources to quantify input factors. They have supplemented empirical analyses with theoretical models of firm behavior and surveys of business managers.

Research has shown that the location decisions of businesses are primarily based on the availability and cost of labor, transportation, raw materials, and capital. The availability and cost of these production factors are usually similar within a region. Most economic development strategies available to local governments, however, only indirectly affect the cost of these primary location factors. Local governments can most easily affect tax rates, public services, and regulatory policies. Economists generally agree that these factors do affect economic development, but the effects on economic development are modest. Thus, most of the strategies available to local governments have only a modest affect on the level and type of economic development in the community.

Local governments in Oregon also play a central role in the provision of buildable land through inclusion of lands in the Urban Growth Boundary, as well as through determination of plan designations and zoning, and through provision of public services. Obviously, businesses need buildable land to locate or expand in a community. Providing buildable land alone is not sufficient to guarantee economic development in a community – market conditions must create demand for this land, and local factors of production must be favorable for business activity. In the context of expected economic growth and the perception of a constrained land supply in Lane County, the provision of buildable land has the potential to strongly influence the level and type of economic development in Eugene. The provision of buildable land is one of the most direct ways that the City of Eugene can affect the level and type of economic development in the community.
What drives long-run economic development?

A regional economic system is complex and is difficult to model, much less to predict without the benefits of models, on the basis of intuition alone. Nonetheless, that is how the large majority of economic development policies get adopted. In light of that reality, the purpose of this section and the following figures is to provide a framework for thinking about causes and effects that will make the intuitions more informed.

Figure B-1 shows the primary drivers of urban growth as generally accepted by urban and regional economists. It illustrates that households are attracted to different regions based on their estimation (explicit or implicit, accurate or not) of the tradeoffs among three categories of variables: availability of jobs, wages, cost of living, and everything else (which is a broad definition of quality of life). The phrase 2nd paycheck refers to all those other things that households want. The arrows and signs illustrate the tradeoffs.

For example, if wages increase, other things equal, a region becomes more attractive and growth is stimulated (migration occurs, and ultimately the residential and commercial development to accommodate that growth). Other things, of course, are not equal. That growth can cause the cost of living to increase, which decreases regional attractiveness (but also creates pressure to increase wages). To the extent that households believe that a region offers natural and cultural amenities (quality of life) that are valuable, they will be willing to pay more (cost of living) or accept less (the first paycheck) to live in the region.

Figure B-2 greatly oversimplifies the dynamics of growth. Each of its elements could be expanded into another diagram. For example, there is a feedback from growth to wages: more growth usually means more demand for labor, which means higher wages to ration an increasingly scarce supply.
As another example, if one were to expand the element labeled 2nd paycheck, one would find that regional economic growth does not have unambiguous effects on the second-paycheck components of quality of life. Business growth affects components of quality of life either directly or indirectly through its impact on population growth. If a generalization is required, urban growth probably tends to increase urban amenities (shopping, entertainment, and organized recreational opportunities) and decrease the environmental quality and the capacity of infrastructure.

Figure B-3 shows that there are many policies a region can adopt to influence the factors that affect economic development. Taking just one example, if a region decided it wanted to affect urban form (for example, because of supposed beneficial effects on the cost of infrastructure and quality of life) there are many categories of policies (e.g., land use, transportation, other public facilities) and many subcategories (e.g., for land use: traditional zoning, minimum-density zoning, design standards, etc.; for public facilities: design standards, concurrency requirements, financial incentives, system development charges and exactions, etc.).
To summarize the conclusions:

- At a regional level, three categories of variables interact to make a region grow: wages, quality of life, and cost of living.
- This simple categorization quickly gets complex: many sub-categories exist, which interact in complicated ways not only within categories, but also across them.
- Quality-of-life factors have been demonstrated empirically to influence residential and business location decisions.

Thus, public policymakers must consider a multitude of factors as they try to adopt optimal economic development policies. It is no longer as simple as just recruiting big industries.
B.3 **Economic Trends and Factors Affecting Future Economic Growth in Eugene**

Eugene exists as part of the larger economy of the southern Willamette Valley and is strongly influenced by regional economic conditions. For many factors, such as labor, Eugene does not differ significantly from the broader region. For other factors, such as income, it does. Thus, Eugene benefits from being a part of the larger regional economy and plays a specific role in the regional economy.

This chapter summarizes national, state, county, and local trends and other factors affecting economic growth in Eugene. Each heading in this chapter represents a key trend or economic factor that will affect Eugene’s economy and economic development potential. A more detailed analysis of economic trends and factors affecting Eugene’s future economic growth is presented in Appendices A and B.

**B.3.1 National, State, and Regional Trends**

**Short-term trends**

The focus of the economic opportunities analysis is long-term economic opportunities and need for land to accommodate employment growth. The EOA generally focuses on long-term economic cycles (Goal 9 requires a 20-year forecast). The recent recession, however, is severe enough that it may continue to affect Oregon’s economy over the next five years, possibly longer. This section briefly summarizes big-picture, short-term economic trends.

- The U.S. economy is in the midst of its deepest recession since World War II. The recession was brought about by instability of financial and housing markets and has already impacted Oregon in a variety of ways, most notably with the labor market showing high unemployment and the housing market’s oversupply of homes. While the national economy may begin to recover from the recession in 2010, the recovery may be a “jobless” recovery, where job growth is sluggish, even as production of goods and services begin to increase. Oregon may see gradual employment increases beginning in the second quarter of 2010 and continuing through 2011.7

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• According to the Oregon Office of Economic Analysis (OEA), the fourth quarter of 2009 is the seventh consecutive quarter with job losses. Statewide job losses slowed from an average monthly loss of 9,800 jobs during the first half of 2009 to average monthly loss of 2,300 jobs during the second half of 2009. The first monthly job increases since November 2007 occurred in December 2009. Oregon lost about 127,000 jobs since the first quarter of 2008, a decline of 7.3%.8

• Nationally, housing demand decreased precipitously during 2008 and continued to decline through 2009. This decrease is the result of a number of factors, including the sub-prime lending crisis, difficulties with the financial industry and resulting tightening of credit availability, the impact of decreases in home value for existing homeowners, and the impact of job losses. The national housing market appears to be stabilizing, although prices may continue to decrease in some areas. The OEA expects that Oregon’s housing market should recover more easily than other states that had greater increases in housing prices during the recent housing boom.9

• The Oregon Index of Leading Indicators indicates that, for the six months ending in November 2009, the index increased an annualized 17.4%, following a revised 15.1% increase the prior month. Recent trends in the Index suggest that Oregon’s economic decline slowed by the end of the second quarter of 2009 and grew during the third and fourth quarters of 2009.10

• Governments across the globe attempted to stabilize the economy through economic stimulus. In the U.S. government stimulation that has directly impacted Oregon includes government subsidies for the housing market and the return of federal timber payments to Oregon’s counties. But the federal timber payments will be phased out over a four-year period, ending in 2011. The withdrawal of these forms of stimulus may have adverse impacts on economic activity.11

• Oregon’s economic health is dependent on the export market. The countries that Oregon has the most exports to are China, Canada,
Malaysia, Japan, and Taiwan. These economies were all affected by
the global recession. Exports to all of these countries, except for
Japan, increased between the first and third quarter of 2009. As
foreign economies recover from the recession, their increased
purchasing power will aid U.S. producers looking to export,
including export firms in Oregon. Oregon’s exports were down by
30% in the beginning of 2009 but started to rebound by the third
quarter of 2009, mostly as a result of increased demand for high
technology products. 12

- The OEA has identified the following major threats to Oregon’s
economic recovery:13
  - Continuing scarcity of credit for consumers and businesses
    and financial market instability.
  - Possibility of an H1N1 flu pandemic and potentially
    substantial impacts on the workforce.
  - Prolonged housing market instability and the possibility of
    further decreases to housing prices.
  - Geopolitical uncertainty, especially tensions with Iran and in
    the Mideast.
  - Uncertainties about the impact of recent tax measures
    passed in January 2010 and other potential tax-related
    initiatives that may be on the ballot.

Long-term National trends

Economic development in Eugene over the next twenty years will occur in
the context of long-run national trends. The most important of these
trends include:

  - National economic recovery from the current recession. Despite
    the unusual depth of the current recession, the national economy is
    expected to begin growing again in 2010. The U.S. Gross Domestic
    Product (GDP) decreased by 2.5% in 2009 but grew at more than
    5% in the fourth quarter of 2009. The Congressional Budget Office
    (CBO) forecasts that the GDP is forecast to grow at about 2.2% for
    2010, averaging to 4.4% for 2012-2014 and 2.4% for 2015-2020.14

12 Ibid., 29-31.
13 Ibid., 10-12.
14 Congressional Budget Office. The Budget and Economic Outlook: Fiscal Years 2010 to 2020,
The CBO projects that the unemployment rate will peak in 2010, declining to an average of about 6.5% over 2012-2014 and averaging 5.0% over 2015-2020. In comparison, the average unemployment rate from 1999 to 2008 was 5.0%. The CBO projects that inflation will continue to average about 1% annually, gradually increasing as the economy approaches full employment. The CBO projects long-term inflation to average about 1.7% per year per year from 2015 to 2020.15

- **The aging of the baby boom generation, accompanied by increases in life expectancy.** The number of people age 65 and older will more than double between 2010 and 2050, while the number of people under age 65 will grow only 20%. The economic effects of this demographic change include a slowing of the growth of the labor force, an increase in the demand for healthcare services, and an increase in the percent of the federal budget dedicated to Social Security and Medicare.16

Baby boomers are expecting to work longer than previous generations. An increasing proportion of people in their early to mid-50s expect to work full-time after age 65. In 2004, about 40% of these workers expect to work full-time after age 65, compared with about 30% in 1992.17 This trend can be seen in Oregon.18

- **Long-term need for replacement workers.** Over the long-term, the need for workers to replace retiring baby boomers will outpace job growth. According to the Bureau of Labor Statistics, net replacement needs will be 34.3 million job openings over the 2008-2018 period, more than twice the growth in employment of 15.3 million jobs. Management occupations and teachers will have the greatest need for replacement workers because these occupations have an older-than-average workforce.19

15 Ibid., 38.


18 “Growing Numbers of Older Workers in Oregon,” Oregon Employment Department.

• **Increases in labor productivity.** Productivity, as measured by output per hour, generally increased between 1947 and 2008. The largest recent increases in productivity occurred between 2000 and 2005, with average annual increases of approximately 3%. Between 2005 and 2008, average annual increases averaged about 1.7%. The largest increases in productivity between 1995 and 2005 were led by industries that produced, sold, or intensively used information technology products. The sectors that experienced the largest productivity increases over the 2000 to 2005 period were: Information, Manufacturing, Retail Trade, and Wholesale Trade. Productivity in mining decreased over the five-year period. 

• **Continued trend towards domestic outsourcing.** Businesses continue to outsource work to less expensive markets. Outsourcing generally falls into two categories: (1) moving jobs from relatively expensive areas to less expensive areas within the U.S. and (2) moving jobs outside of the U.S. to countries with lower labor costs. About three-quarters of layoffs in the U.S. between 1995 and 2004 were the result of domestic relocation, involving movement of work within the same company. The industries with the largest amounts of domestic outsourcing were: manufacturing, retail trade, and information. Jobs that are outsourced or moved off-shore generally involve operation of technology or use of telecommunications. The service occupations most susceptible to being moved off-shore over the 2006 to 2016 period include: computer programmers, pharmacy technicians, parts salespersons, telephone operators, billing and posting clerks and machine operators, computer operators, data entry keyers, and word processors and typists.

• **Continued growth in global trade and the globalization of business activity.** With increased global trade, both exports and imports rise. Faced with increasing domestic and international competition, firms will seek to reduce costs through implementing

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quality- and productivity-enhancing technologies, such as robotics or factor automation. In addition, some production processes will be outsourced off-shore.24

- Continued shift of employment from manufacturing and resource-intensive industries to the service-oriented sectors of the economy. Increased worker productivity and the international outsourcing of routine tasks led to declines in employment in the major goods-producing industries. Projections from the Bureau of Labor Statistics indicate that U.S. employment growth will continue to be strongest in healthcare and social assistance, professional and business services, and other service industries. Construction employment will grow with the economy but manufacturing employment will decline.25

- The importance of high-quality natural resources. The relationship between natural resources and local economies has changed as the economy has shifted away from resource extraction. Increases in the population and in households’ incomes, plus changes in tastes and preferences, have dramatically increased demands for outdoor recreation, scenic vistas, clean water, and other resource-related amenities. Such amenities contribute to a region’s quality of life and play an important role in attracting both households and firms.26

- The growing importance of education as a determinant of wages and household income. According to the Bureau of Labor Statistics, a majority of the fastest growing occupations will require an academic degree, and on average they will yield higher incomes than occupations that do not require an academic degree. The fastest growing of occupations requiring an academic degree will be: computer software application engineers, elementary school teachers, and accountants and auditors. Occupations that do not require an academic degree (e.g., retail sales person, food

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preparation workers, and home care aides) will grow, accounting for about half of all jobs by 2018. These occupations typically have lower pay than occupations requiring an academic degree. 27

The national median earning in 2008 was about $34,700. Workers without a high school diploma earned $14,500 less than the median income and workers with a high school diploma earned $7,300 less than median income. Workers with some college earned slightly less than median and workers with a bachelor’s degree earned $12,300 more than median. Workers in Oregon experience the same patterns as the nation but pay is generally lower in Oregon than the national average.28

- **Continued increase in demand for energy.** Energy prices are forecast to return to relatively high levels, such as those seen in the 2006 to 2008 period, possibly increasing further over the planning period. There is, however, some uncertainty about energy prices, with the possibility of lower energy prices if major-oil-producing countries expand production beyond the forecast. Higher energy prices are possible if major-oil-producing countries maintain tight control over production. Output from the most energy-intensive industries is expected to decline, but growth in the population and in the economy is expected to increase the total amount of energy demanded. Energy sources are expected to diversify and the energy efficiency of automobiles, appliances, and production processes are projected to increase. Despite increases in energy efficiency and decreases in demand for energy by some industries, demand for energy is expected to increase over the 2009 to 2030 period because of increases in population and economic activity. 29

- **Possible effect of rising transportation and fuel prices on globalization.** Increases in fuel prices are related to globalization: When transportation is less expensive, companies move production to areas with lower labor costs. Oregon has benefited from this trend, with domestic outsourcing of call centers and other back office functions. In other cases, businesses in Oregon (and the

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nation) have “off-shored” employment to other countries, most frequently manufacturing jobs.

Increases in either transportation or labor costs may impact globalization. When the wage gap between two areas is larger than the additional costs of transporting goods, companies are likely to shift operations to an area with lower labor costs. Conversely, when transportation costs increase, companies may have incentive to relocate to be closer to suppliers or consumers.

This effect occurs incrementally over time and it is difficult to measure the impact in the short-term. If fuel prices and transportation costs decrease over the planning period, businesses may not make the decision to relocate (based on transportation costs) because the benefits of being closer to suppliers and markets may not exceed the costs of relocation.

• **Growing opportunities for “green” businesses.** Businesses are increasingly concerned with “green” business opportunities and practices. These business practices include “the design, commercialization, and use of processes and products that are feasible and economical while reducing the generation of pollution at the source and minimizing the risk to human health and the environment.”

Defining what constitutes a green job or business is difficult because most industries can have jobs or business practices that are comparatively environmentally beneficial. A 2009 study by the Pew Charitable Trust defines the clean energy economy as an economy that “generates jobs, businesses and investments while expanding clean energy production, increasing energy efficiency, reducing greenhouse gas emissions, waste and pollution, and conserving water and other natural resources.”

The Pew study classifies businesses in the clean energy economy into five separate categories:

- **Clean Energy.** Building sustainable energy for the future.
- **Energy Efficiency.** Reducing and managing our energy demand.

30 Urban Green Partnership at urbangreenpartnership.org

- Environmentally Friendly Production. Improving our products and processes.
- Conservation and Pollution Mitigation. Recycling and remediating waste.
- Training and Support. Helping develop our clean energy economy.

The study found that clean energy jobs grew about two and one-half times faster than all jobs over the 1998 to 2007 period. Pew found that clean energy jobs grew at 9.1% annually between 1998 and 2007, compared with total job growth of 3.7% over the same period. In Oregon, clean energy jobs grew faster than the national average, with 50.7% annual growth, compared to total job growth of 7.5% annually. In 1998, Oregon had about 1,600 clean businesses and about 19,000 clean jobs by 2007.32

- Potential impacts of global climate change. There is a growing consensus that global climate change is occurring and will have important ecological, social, and economic consequences over the next decades and beyond.33 Extensive research shows that Oregon and other western states already have experienced noticeable changes in climate, and predicts that more change will occur in the future.34

In the Pacific Northwest, climate change is likely to (1) increase average annual temperatures, (2) increase the number and duration of heat waves, (3) increase the amount of precipitation falling as rain during the year, and (4) increase the intensity of rainfall events.

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32 Ibid., 8.
These changes are also likely to reduce winter snowpack and shift the timing of spring runoff earlier in the year.\textsuperscript{35}

These anticipated changes point toward some of the ways that climate change is likely to impact ecological systems and the goods and services they provide. There is considerable uncertainty about how long it would take for some of the impacts to materialize, and the magnitude of the associated economic consequences. Assuming climate change proceeds as today’s models predict, however, some of the potential economic impacts of climate change in the Pacific Northwest will likely include:\textsuperscript{36}

\begin{itemize}
\item \textit{Potential impact on agriculture and forestry.} Climate change may impact Oregon’s agriculture through changes in: growing season, temperature ranges, and water availability.\textsuperscript{37} Climate change may impact Oregon’s forestry through increase in wildfires, decrease in the rate of tree growth, change in mix of tree species, and increases in disease and pests that damage trees.\textsuperscript{38}
\item \textit{Potential impact on tourism and recreation.} Impacts on tourism and recreation may range from: (1) decreases in snow-based recreation if snow-pack in the Cascades decreases, (2) negative impacts to tourism along the Oregon Coast as a
\end{itemize}

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\textsuperscript{36} The issue of global climate change is complex and there is a substantial amount of uncertainty about climate change. This discussion is not intended to describe all potential impacts of climate change but to present a few ways that climate change may impact the economy of cities in Oregon and the Pacific Northwest.


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result of damage and beach erosion from rising sea levels, and (3) negative impacts on summer river recreation (e.g., river rafting or sports fishing) as a result of lower summer river flows.

Global climate change also may offer economic opportunities. The search for alternative energy sources may result in increased investment and employment in “green” energy sources, such as wind, solar, and biofuels. Firms in the Northwest are well positioned to lead efforts on climate change mitigation, which may result in export products, such as renewable technologies or green manufacturing.

- **Potential impacts arising from efforts to address global climate change.** The prospect of global climate change has prompted many proposals for changes in socioeconomic and political structures at the global, national, regional, and local level. These proposals are geared towards reducing the emissions of greenhouse gases and to preparing for changes in climate that cannot be avoided. Some of the most prominent proposals include:
  
  o *Tax on burning fossil fuels.* One approach is to impose a tax (or something equivalent to a tax, such as a cap-and-trade program) on activities that burn coal, petroleum, or other fossil fuels. For example, the Western Climate Initiative, a collaboration of western states (including Oregon) and Canadian provinces committed to working together to reduce greenhouse gas emissions at a regional level, recently released a design for a regional cap-and-trade program to be implemented by 2015.
  
  o *Tax carbon emissions.* Climate change legislation has also been introduced in Congress, and several current proposals would involve a tax on carbon emissions or a cap-and-trade program to limit emissions.

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42 Pew Center on Global Climate Change website: http://www.pewclimate.org/what_s_being_done/in_the_states/
Promote development of alternative energy sources. Other local, regional, and national efforts seek to improve the energy efficiency of household, commercial, and industrial activities, and to promote the development of technologies that generate electricity from wind and other renewable sources of energy.43

How these and other proposals, if enacted, would affect the local and regional economies remains unknown, but the proposals could lead to substantial changes in consumer-expenditure patterns and business practices.

Short-term national trends will also affect economic growth in the region, but these trends are difficult to predict. At times these trends may run counter to the long-term trends described above. A recent example is the downturn in economic activity in 2008 and 2009 following declines in the housing market and the mortgage banking crisis. The result of the economic downturn has been a decrease in employment related to the housing market, such as construction and real estate. Employment in these industries will recover as the housing market recovers and will continue to play a significant role in the national, state, and local economy over the long run. This report takes a long-run perspective on economic conditions (as the Goal 9 requirements intend) and does not attempt to predict the impacts of short-run national business cycles on employment or economic activity.

State and regional trends

State and regional trends will also affect economic development in Eugene over the next twenty years. The most important of these trends includes: continued in-migration from other states, distribution of population and employment across the State, and change in the types of industries in Oregon.

- Continued in-migration from other states. Oregon will continue to experience in-migration from other states, especially California and Washington. According to a U.S. Census study, Oregon had net interstate in-migration (more people moved to Oregon than moved from Oregon) during the period 1990-2004.44 Oregon had an annual average of 26,290 more in-migrants than out-migrants during the

43 See, for example, some of the state-level initiatives in Oregon at http://www.oregon.gov/ENERGY/GBLWRM/index.shtml

period 1990-2000. The annual average dropped to 12,880 during the period 2000-2004.45 Most in-migrants come from California, Washington, and other western states.46

- **Concentration of population and employment in the Willamette Valley.** About 43% of Oregon’s population lives within the three-county area of Multnomah, Washington, and Clackamas Counties and nearly 70% of Oregon’s population lives in the Willamette Valley.47 The OEA forecasts that population will continue to be concentrated in the Willamette Valley through 2040, increasing slightly to 71% of Oregon’s population.

Employment growth generally follows the same trend as population growth. Employment growth varies between regions even more, however, as employment reacts more quickly to changing economic conditions. Total employment increased in each of the state’s regions over the period 1970-2008 but about half of Oregon’s employment was located within the Multnomah, Washington, and Clackamas Counties and about 70% of Oregon’s employment was located in the Willamette Valley.48

- **Change in the type of the industries in Oregon.** As Oregon has transitioned away from natural resource-based industries, the composition of Oregon’s employment has shifted from natural resource-based manufacturing and other industries to service industries. The share of Oregon’s total employment in Service industries increased from its 1970s average of nearly 20% to about 45% in 2008 while employment in Manufacturing declined from an average of 18% in the 1970s to an average of 12% in 2008.

- **Shift within manufacturing from natural resource-based to high-tech and other manufacturing industries.** Since 1970, Oregon started to transition away from reliance on traditional resource-

45 In contrast, California had net interstate out-migration over the same period. During 1990-2000, California had an annual average of 220,871 more out-migrants than in-migrants. The net outmigration slowed to 99,039 per year during 2000-2004.

46 Oregon Department of Motor Vehicles collects data about state-of-origin for drivers licenses surrendered by people applying for an Oregon drivers license from out-of-state. Between 2000 and 2007, about one-third of licenses surrendered were from California, 15% to 18% were surrendered from Washington, and about 17% to 19% were from the following states: Arizona, Idaho, Nevada, Colorado, and Texas.

47 2007 American Community Survey.

extraction industries. A significant indicator of this transition is the shift within Oregon’s manufacturing sector, with a decline in the level of employment in the Lumber & Wood Products industry and concurrent growth of employment in other manufacturing industries, such as high-technology manufacturing (Industrial Machinery, Electronic Equipment, and Instruments), Transportation Equipment manufacturing, and Printing and Publishing. 49

- **Continued importance of manufacturing to Oregon’s economy.** Revenue from exports totaled $19.4 billion in 2008, an increase of $8.0 billion or 70% since 2000. Four of the five industries that accounted for more than three-quarters of revenue from exports in 2007 ($15.1 billion) were manufacturing industries: Computers and Electronic Production ($8.0 billion); Agricultural Products ($2.8 billion); Machinery Manufacturers ($1.6 billion); Transportation Equipment ($1.5 billion); and Chemical Manufacturers ($1.3 billion).50 Manufacturing employment is concentrated in eight counties in the Willamette Valley and Portland metropolitan region. Average wages for employees of manufacturing firms in these counties in 2008 ranged from $79,658 to $30,904 and were generally above the state’s average (about $53,130).51

- **Small businesses continue to account for over 50% of employment in Oregon.** Small businesses, those with 100 or fewer employees, account for 51% of private sector employment in Oregon. Workers of small businesses typically had lower wages than the state average, with average wages of $33,130 compared to the statewide average of about $38,000 in 2006.

- **Continued lack of diversity in the State Economy.** While the transition from Lumber and Wood Products manufacturing to high-tech manufacturing has increased the diversity of employment within Oregon, it has not significantly improved Oregon’s diversity relative to the national economy. Oregon’s relative diversity has historically ranked low among states. Oregon

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49 Although Oregon’s economy has diversified since the 1970’s, natural resource-based manufacturing accounts for more than one-third of employment in manufacturing in Oregon in 2006, with the most employment in Wood Product and Food manufacturing.

50 OECD, “Economic Data Packet, April 2009.”

51 Oregon Employment Department, Covered Employment and Wages. http://www.qualityinfo.org/olmisj/CEP
ranked 35th in diversity (1st = most diversified) based on Gross State Product data for 1963–1986, and 32nd based on data for the 1977–1996 period. A recent analysis, based on 2007 data, ranked Oregon 31st. These rankings suggest that Oregon is still heavily dependent on a limited number of industries. Relatively low economic diversity increases the risk of economic volatility as measured by changes in output or employment.

The changing composition of employment has not affected all regions of Oregon evenly. Growth in high-tech and Services employment has been concentrated in urban areas of the Willamette Valley and Southern Oregon, particularly in Washington, Benton, and Josephine Counties. The brunt of the decline in Lumber & Wood Products employment was felt in rural Oregon, where these jobs represented a larger share of total employment and an even larger share of high-paying jobs than in urban areas.

Availability of Labor

The availability of trained workers in Eugene will impact development of Eugene’s economy over the planning period. Key trends that will affect the workforce in Eugene over the next 20-years include Eugene’s growing population, aging population, and commuting trends.

Growing population

Population growth in Oregon tends to follow economic cycles. Historically, Oregon’s economy is more cyclical than the nation’s, growing faster than the national economy during expansions, and contracting more rapidly than the nation during recessions. Oregon grew more rapidly than the U.S. in the 1990s (which was generally an expansionary period) but lagged behind the U.S. in the 1980s. Oregon’s slow growth in the 1980s was primarily due to the nationwide recession early in the decade. As the nation’s economic growth slowed during 2007, Oregon’s population growth began to slow.

Oregon’s population grew from 2.8 million people in 1990 to 3.8 million people in 2008, an increase of nearly 950,000 people at an average annual rate of 1.6%. Oregon’s growth rate slowed to 1.3% annual growth between 2000 and 2008.

---


Lane County grew slower than the State between 1990 and 2008, growing at 1.1% annually and adding nearly 63,000 people. Nearly 45% of the County’s population lived in Eugene in 2008. Eugene’s population grew faster than the County average, at 1.8% annually, adding 41,951 residents over the eighteen-year period.

Table B-1. Population in the U.S., Oregon, the Willamette Valley, Lane County, and Eugene, 1990-2008

<table>
<thead>
<tr>
<th>Area</th>
<th>1990</th>
<th>2000</th>
<th>2008</th>
<th>Number</th>
<th>Percent</th>
<th>AAGR</th>
</tr>
</thead>
<tbody>
<tr>
<td>U.S.</td>
<td>248,709,873</td>
<td>281,421,906</td>
<td>304,059,724</td>
<td>55,349,851</td>
<td>22%</td>
<td>1.1%</td>
</tr>
<tr>
<td>Oregon</td>
<td>2,842,321</td>
<td>3,421,399</td>
<td>3,791,060</td>
<td>948,739</td>
<td>33%</td>
<td>1.6%</td>
</tr>
<tr>
<td>Willamette Valley</td>
<td>1,962,816</td>
<td>2,380,606</td>
<td>2,634,074</td>
<td>671,258</td>
<td>34%</td>
<td>1.6%</td>
</tr>
<tr>
<td>Lane County</td>
<td>282,912</td>
<td>322,959</td>
<td>345,878</td>
<td>62,966</td>
<td>22%</td>
<td>1.1%</td>
</tr>
<tr>
<td>Eugene</td>
<td>112,669</td>
<td>137,893</td>
<td>154,620</td>
<td>41,951</td>
<td>37%</td>
<td>1.8%</td>
</tr>
</tbody>
</table>


Notes: Benton, Clackamas, Lane, Linn, Marion, Multnomah, Polk, Washington, and Yamhill Counties represent the Willamette Valley Region.

Migration is the largest component of population growth in Oregon. Between 1990 and 2008, in-migration accounted for 69% of Oregon’s population growth. Over the same period, in-migration accounted for 74% of population growth in Lane County, adding more than 46,000 residents over the eighteen-year period.

Aging population

The number of people age 65 and older in the U.S. is expected to double by 2050, while the number of people under age 65 will only grow by 12%. The economic effects of this demographic change include a slowing of the growth of the labor force, need for workers to replace retirees, aging of the workforce for seniors that continue working after age 65, an increase in the demand for healthcare services, and an increase in the percent of the federal budget dedicated to Social Security and Medicare.54

The average age of Eugene residents is increasing. Table B-2 shows the change in age distribution for Eugene between 2000 and 2007. All age groups under the age of 25 lost share of Eugene’s population while all age groups above the age of 25 gained share. The largest growing age group in

terms of percentage was those over the age of 65, gaining 23% or 3,754 people over the period.

Table B-2. Change in age distribution, Eugene, 2000-2007

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Under 5</td>
<td>7,367</td>
<td>5%</td>
<td>7,430</td>
<td>5%</td>
<td>63</td>
<td>1%</td>
<td>-1%</td>
</tr>
<tr>
<td>5-17</td>
<td>20,686</td>
<td>15%</td>
<td>20,271</td>
<td>13%</td>
<td>-415</td>
<td>-2%</td>
<td>-2%</td>
</tr>
<tr>
<td>18-24</td>
<td>23,868</td>
<td>17%</td>
<td>24,513</td>
<td>16%</td>
<td>645</td>
<td>3%</td>
<td>-1%</td>
</tr>
<tr>
<td>25-44</td>
<td>39,247</td>
<td>28%</td>
<td>44,186</td>
<td>29%</td>
<td>4,939</td>
<td>13%</td>
<td>0%</td>
</tr>
<tr>
<td>45-64</td>
<td>30,068</td>
<td>22%</td>
<td>36,801</td>
<td>24%</td>
<td>6,733</td>
<td>22%</td>
<td>2%</td>
</tr>
<tr>
<td>65 and over</td>
<td>16,657</td>
<td>12%</td>
<td>20,411</td>
<td>13%</td>
<td>3,754</td>
<td>23%</td>
<td>1%</td>
</tr>
<tr>
<td>Total</td>
<td>137,893</td>
<td>100%</td>
<td>153,612</td>
<td>100%</td>
<td>15,719</td>
<td>11%</td>
<td>0%</td>
</tr>
</tbody>
</table>


Eugene’s age distribution was similar to those of the County and State in 2007. Figure B-4 shows the age structure for Oregon, Lane County, and Eugene in 2007. Eugene had a larger share of residents between the ages of 20 and 29 than the County or the State, which can be attributed to the influence of the University of Oregon. Eugene’s age distribution is relatively similar to the State and County for other age groups.

Figure B-4. Population by age, Oregon, Lane County, and Eugene, 2007
Figure B-5 shows the population for age in Lane County in 2000 and the Oregon Office of Economic Analysis’ (OEA) projection for 2030. The OEA projects the share of the population over the age of 59 will grow from 17% in 2000 to 26% in 2030.

**Figure B-5. Population by age, Lane County, 2000 and 2030**

**Income**

Figure B-6 shows the change in per capita personal income for the U.S., Oregon, and Lane County between 1980 and 2006 (in constant 2006 dollars). Oregon’s per capita personal income was consistently lower than the U.S. average over the 26-year period. While the gap between the Oregon and U.S. average narrowed in the mid-1990s, it widened again starting in the late 1990’s, with Oregon’s per capita income increasing slower than the nation’s.

**Figure B-6. Per capita personal income in the U.S., Oregon, and Lane County, 1980-2006, (2006 dollars)**

Table B-3 shows average annual pay per employee in the U.S., Oregon, and Lane County for 2000 to 2007. The national average wage grew faster than State or County averages. The average U.S. wage increased by 26% (more than $9,000), compared to the State increase of 21% (nearly $6,800) or the County increase of 23% (nearly $6,500). Wages in Lane County relative to the U.S. decreased by 2% over the seven-year period.

Lane County’s average pay has grown faster than the State average, increasing from 85% of the State average in 2000 to 87% in 2007.

Table B-3. Average annual pay, U.S., Oregon, and Lane County (nominal dollars), 2000-2007

<table>
<thead>
<tr>
<th>Year</th>
<th>U.S.</th>
<th>Oregon</th>
<th>Lane County</th>
<th>% of U.S.</th>
<th>% of State</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>$35,323</td>
<td>$32,776</td>
<td>$27,878</td>
<td>79%</td>
<td>85%</td>
</tr>
<tr>
<td>2001</td>
<td>$36,219</td>
<td>$33,202</td>
<td>$28,982</td>
<td>80%</td>
<td>87%</td>
</tr>
<tr>
<td>2002</td>
<td>$36,764</td>
<td>$33,685</td>
<td>$29,427</td>
<td>80%</td>
<td>87%</td>
</tr>
<tr>
<td>2003</td>
<td>$37,765</td>
<td>$34,455</td>
<td>$30,325</td>
<td>80%</td>
<td>88%</td>
</tr>
<tr>
<td>2004</td>
<td>$39,354</td>
<td>$35,627</td>
<td>$31,325</td>
<td>80%</td>
<td>88%</td>
</tr>
<tr>
<td>2005</td>
<td>$40,677</td>
<td>$36,593</td>
<td>$32,302</td>
<td>79%</td>
<td>88%</td>
</tr>
<tr>
<td>2006</td>
<td>$42,535</td>
<td>$38,070</td>
<td>$33,240</td>
<td>78%</td>
<td>87%</td>
</tr>
<tr>
<td>2007</td>
<td>$44,450</td>
<td>$39,566</td>
<td>$34,328</td>
<td>77%</td>
<td>87%</td>
</tr>
</tbody>
</table>

Change 2000 to 2007

<table>
<thead>
<tr>
<th></th>
<th>Nominal Change</th>
<th>Percent Change</th>
<th>Lane County</th>
<th>% of U.S.</th>
<th>% of State</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nominal Change</td>
<td>$9,127</td>
<td>26%</td>
<td>$6,450</td>
<td>21%</td>
<td>23%</td>
</tr>
</tbody>
</table>


Figure B-7 shows the major sources of per capita personal income for Oregon and Lane County between 1980 and 2006. Since the late-1980’s, compared to State averages, Lane County residents have had a smaller share of personal income from net earnings and a larger share from transfer payments and dividends, interest, and rent. Lane County’s share of personal income from net earnings was 61% in 2006, lower than Oregon’s average of 65%. The County’s share of personal income from transfer payments and dividends, interest, and rent was about 39% in 2006, compared with the State average of 35%.

Retirees are most likely to have personal income from current transfers and dividends, interest, and rent. The larger share of personal income from these sources makes sense because Lane County has a larger share of people over 60 years of age than the State average. Figure B-4 shows that Lane County has a higher percentage of residents over 60 years old than the State average. In addition, the share of population aged 65 and older increased by 16% between 1990 and 2000 in Lane County, compared with a 12% statewide increase in population 65 and older.
Figure B-7 Per capita personal income by major sources, Oregon and Lane County, 1980-2005

Source: Regional Economic Information System, Bureau of Economic Analysis, U.S. Department of Commerce, https://www.bea.gov/regional/reis/default.cfm?selTable=CA05

Figure B-8 shows the distribution of household income in Oregon, Lane County, and Eugene in 2007. About 59% of Eugene’s households had income of less than $50,000, compared with 57% of County households and 51% of State households.

Figure B-8. Distribution of household income of Oregon, Lane County, and Eugene, 2007

Source: 2007 American Community Survey, B19001
Table B-4 shows three measures of income for Oregon, Lane County, and Eugene: per capita income, median household income, and median family income. Eugene has lower per capita and median household income but a higher median family income than the State average.

Table B-4. Per Capita Income, Median Household Income, Median Family Income, Oregon, Lane County, and Eugene, 2007

<table>
<thead>
<tr>
<th></th>
<th>Per Capita Income</th>
<th>Median Household Income</th>
<th>Median Family Income</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oregon</td>
<td>$25,501</td>
<td>$48,730</td>
<td>$59,152</td>
</tr>
<tr>
<td>Lane County</td>
<td>$23,530</td>
<td>$43,111</td>
<td>$54,603</td>
</tr>
<tr>
<td>Eugene</td>
<td>$25,098</td>
<td>$41,706</td>
<td>$60,492</td>
</tr>
</tbody>
</table>

Source: 2007 American Community Survey, B19013, B19113, B19301

Eugene’s lower per capita and median household income can be attributed to Eugene’s large share of young households, the majority of which are students at the University of Oregon. In 2007, 12% of Eugene’s householders were younger than 25 years old, compared with the County average of 7% and the State average of 5%.

These younger households typically have lower income compared with older households. Figure B-9 shows household income by household age in Eugene 2007. Nearly two-thirds of households younger than 25 years of age had income of less than $25,000. In contrast, less than one-quarter of households between 25 and 64 years had income of less than $25,000.

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55 The Census defines a household as: “A household includes all the people who occupy a housing unit as their usual place of residence.” The Census defines a family as “A group of two or more people who reside together and who are related by birth, marriage, or adoption.”
The low average income in Lane County and Eugene, relative to Oregon and the U.S., make Eugene attractive to some firms considering moving within the U.S. Firms continue to outsource back-office functions, such as call centers or administrative functions, within the U.S. Lane County’s relatively low labor costs and the availability of trained workers make Lane County attractive to firms considering relocating back-office functions. Eugene may be attractive to firms that need university student workers.
Educational attainment

The availability of trained, educated workers affects the quality of labor in a community. Educational attainment is an important labor force factor because firms need to be able to find educated workers. Figure B-10 shows the share of population by education level completed in Oregon, Lane County, and Eugene in 2007. In 2007, Eugene had a higher share of residents above the age of 25 with a bachelor’s degree or higher (41%) than residents of Lane County or Oregon (both 28%). Twenty-nine percent of Eugene residents above the age of 25 did not attend any college, compared to 38% of Lane County residents and 39% of Oregon residents.

Figure B-10. Educational attainment for the population 25 years and over, Oregon, Lane County and Eugene, 2007

Opportunities for workforce training and post-secondary education for residents of the Eugene-Springfield area include: the University of Oregon, Lane Community College, Pacific University, Northwest Christian College, and Gutenberg College.
**Workforce participation and unemployment**

The current labor force participation rate is an important consideration in the availability of labor. The labor force in any market consists of the adult population (16 and over) who are working or actively seeking work. The labor force includes both the employed and unemployed. Children, retirees, students, and people who are not actively seeking work are not considered part of the labor force. According to the 2007 American Community Survey, Eugene has nearly 82,000 people in its labor force.

The unemployment rate is one indicator of the relative number of workers who are actively seeking employment. Figure B-11 shows the unemployment rate for the United States, Oregon, Lane County, and Eugene for the past decade. During this period, Lane County’s unemployment was similar to the statewide unemployment rate. The County and State unemployment rates were consistently higher than the national average. Eugene’s unemployment rate was generally lower than the County or State average but above the national average.

**Figure B-11. Unemployment rates for the U.S., Oregon, Lane County, and Eugene, January 2000 to January 2010**


Note: unemployment data is not seasonally adjusted
**Commuting patterns**

Commuting plays an important role in Eugene’s economy. Figure B-12 shows a comparison of the commute time to work for residents 16 years and older for Oregon, Lane County, and Eugene in 2007. Ninety percent of Eugene residents have a commute of less than 30 minutes compared to 83% of Lane County residents and 72% of Oregon residents.

**Figure B-12. Commuting time to work in minutes for residents 16 years and older, Oregon, Lane County, and Eugene, 2007**

![Bar chart showing commuting times for Eugene, Lane County, and Oregon.]

Source: 2007 American Community Survey, B08303

Table B-5 and Figure B-13 show the places where residents of Eugene were employed in 2006. Eighty-five percent of Eugene’s 65,000 working residents worked in Lane County, 62% worked within Eugene city limits, and 10% worked in Springfield.
Table B-5. Places that residents of Eugene were employed, 2006

<table>
<thead>
<tr>
<th>Location</th>
<th>Number</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lane County</td>
<td>55,183</td>
<td>85%</td>
</tr>
<tr>
<td>Eugene</td>
<td>40,282</td>
<td>62%</td>
</tr>
<tr>
<td>Springfield</td>
<td>6,264</td>
<td>10%</td>
</tr>
<tr>
<td>Junction City</td>
<td>1,074</td>
<td>2%</td>
</tr>
<tr>
<td>Coburg</td>
<td>863</td>
<td>1%</td>
</tr>
<tr>
<td>Unincorporated Lane County</td>
<td>6,700</td>
<td>10%</td>
</tr>
<tr>
<td>Multnomah County</td>
<td>1,868</td>
<td>3%</td>
</tr>
<tr>
<td>Portland</td>
<td>1,692</td>
<td>3%</td>
</tr>
<tr>
<td>Marion County</td>
<td>1,471</td>
<td>2%</td>
</tr>
<tr>
<td>Washington County</td>
<td>1,256</td>
<td>2%</td>
</tr>
<tr>
<td>Linn County</td>
<td>1,026</td>
<td>2%</td>
</tr>
<tr>
<td>Douglas County</td>
<td>713</td>
<td>1%</td>
</tr>
<tr>
<td>Benton County</td>
<td>713</td>
<td>1%</td>
</tr>
<tr>
<td>Jackson County</td>
<td>536</td>
<td>1%</td>
</tr>
<tr>
<td>Deschutes County</td>
<td>534</td>
<td>1%</td>
</tr>
<tr>
<td>Coos County</td>
<td>267</td>
<td>0%</td>
</tr>
<tr>
<td>All Other Locations</td>
<td>1,441</td>
<td>2%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>65,008</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>

Figure B-13. Places that residents of Eugene were employed, 2006

Table B-6 and Figure B-14 show where employees of firms located in Eugene lived in 2004. Eighty-five percent of Eugene’s workers lived in Lane County. Forty-eight percent lived in Eugene, and 12% lived in Springfield. Roughly 20% of Eugene’s workers lived in unincorporated areas of Lane County and 15% lived outside of Lane County.

Table B-6. Places where workers in Eugene lived, 2006

<table>
<thead>
<tr>
<th>Location</th>
<th>Number</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lane County</td>
<td>70,234</td>
<td>85%</td>
</tr>
<tr>
<td>Eugene</td>
<td>40,282</td>
<td>48%</td>
</tr>
<tr>
<td>Springfield</td>
<td>10,189</td>
<td>12%</td>
</tr>
<tr>
<td>Unincorporated Lane County</td>
<td>19,763</td>
<td>24%</td>
</tr>
<tr>
<td>Multnomah County</td>
<td>1,776</td>
<td>2%</td>
</tr>
<tr>
<td>Washington County</td>
<td>1,658</td>
<td>2%</td>
</tr>
<tr>
<td>Linn County</td>
<td>1,649</td>
<td>2%</td>
</tr>
<tr>
<td>Marion County</td>
<td>1,331</td>
<td>2%</td>
</tr>
<tr>
<td>Clackamas County</td>
<td>1,017</td>
<td>1%</td>
</tr>
<tr>
<td>Douglas County</td>
<td>890</td>
<td>1%</td>
</tr>
<tr>
<td>Benton County</td>
<td>824</td>
<td>1%</td>
</tr>
<tr>
<td>Jackson County</td>
<td>798</td>
<td>1%</td>
</tr>
<tr>
<td>Deschutes County</td>
<td>756</td>
<td>1%</td>
</tr>
<tr>
<td>All Other Locations</td>
<td>2,172</td>
<td>3%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>83,105</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>

These commuting patterns show that Eugene firms have access to workforce living throughout the Eugene-Springfield region. Even though commutes in Eugene are generally shorter than the State average, these commuting patterns create demand for automotive and other forms of transportation, both within Eugene and on roads throughout the Eugene-Springfield region.

Increasing energy prices may impact commuting patterns within the Eugene-Springfield area. The impact is most likely to be greatest for workers living in the smaller cities around the Eugene-Springfield area (e.g., Veneta or Oakridge) because the commute to Eugene is longer from these outlying cities. Willingness to commute by most workers living and working within Eugene and Springfield is likely to have relatively little impact from fuel prices, unless prices increase dramatically.

**Changes in employment**

The economy of the nation changed in the 1980 to 2006 period. These changes affected the composition of Oregon’s economy, including Lane County and Eugene. The most important shift during this period at the national-level was the shift in employment from a focus on manufacturing
to services. The most important shift in Oregon, including Lane County and Eugene, has been the shift from a timber-based economy to a more diverse economy, with the greatest employment in services. The most important trends and changes in employment for Eugene over the next 20 years are: shifts in employment, growing importance of health care, continued importance of manufacturing, and outlook for growth in Eugene.

**Lane County employment trends**

Over the past few decades, employment in the U.S. has shifted from manufacturing and resource-intensive industries to service-oriented sectors of the economy. Increased worker productivity and the international outsourcing of routine tasks have lead to declines in employment in the major goods-producing industries.

In the 1970s Oregon started to transition away from reliance on traditional resource-extraction industries. An important indicator of this transition is the shift within Oregon’s manufacturing sector, with a decline in the level of employment in the Lumber & Wood Products industry and concurrent growth of employment in high-technology manufacturing industries (Industrial Machinery, Electronic Equipment, and Instruments).

As Oregon has transitioned away from natural resource-based industries, the composition of Oregon’s employment has shifted from natural resource based manufacturing and other industries to service industries. The share of Oregon’s total employment in Service industries increased from its 1970s average of 19% to 30% in 2000, while employment in Manufacturing declined from an average of 18% of total employment in the 1970s to an average of 12% in 2000.

The changes in employment in Lane County have followed similar trends as changes in national and state employment. Between 1980 and 2006, Lane County added more than 53,000 jobs. The sectors with the greatest change in share of employment were Services and Retail Trade, adding more than 38,500 or 73% of new jobs. Over the 26-year period, manufacturing added more than 4,000 jobs (8% of new jobs), with the greatest growth in: Transportation Equipment manufacturing (R.V. manufacturing), Computer and Electronics manufacturing, and Machinery manufacturing.

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56 Lumber and Wood Products manufacturing is in Standard Industrial Classification (SIC) 24

57 SIC 35, 36, 38
Some industries in the region’s employment base have volatile employment cycles. These industries typically have boom and bust cycles, which result in cycles of hiring and layoffs. The lumber and wood products industry is tied to national housing market cycles, with decreased productivity and employment in slow housing markets. The RV manufacturing industry is tied to broader national economic trends and energy price changes. Finally, the region’s high-tech companies are subject to market trends in the high-tech industry, including changes in production methods and consumer purchasing patterns. Two major high-tech firms, Hynix and Sony, located in the Eugene-Springfield region and closed their production facilities between the mid-1990’s and 2008.

Tables B-7 and B-8 present data from the Oregon Employment Department that show changes in covered employment for Lane County between 1980 and 2007. The changes in sectors and industries are shown in two tables: (1) between 1980 and 2000 and (2) between 2001 and 2007. The analysis is divided in this way because of changes in industry and sector classification that made it difficult to compare information about employment collected after 2001 with information collected prior to 2000.

Employment data in this section is summarized by sector, each of which includes several individual industries. For example, the Retail Trade sector includes General Merchandise Stores, Motor Vehicle and Parts Dealers, Food and Beverage Stores, and other retail industries.

Table B-7 shows the changes in covered employment by sector in Lane County between 1980 and 2000. Covered employment in the County grew from 97,600 to 139,696, an increase of 43% or 42,096 jobs. Every sector added jobs during this period, except for Mining. The sectors with the greatest change in employment were Services and Retail Trade, adding a total of 29,423 jobs or about 70% of all new jobs.

Manufacturing grew by 4,020 jobs during the twenty-year period. The industries with the largest manufacturing growth were Transportation equipment manufacturing (R.V. manufacturing), computer and electronics manufacturing, and machinery manufacturing.

Average pay per employee increased from about $13,700 in 1980 to $27,900 in 2000. The sectors that grew the fastest generally paid less than average, with Services paying between 80% to 90% of average and Retail

58 Covered employment refers to jobs covered by unemployment insurance, which includes most wage and salary jobs but does not include sole proprietors, seasonal farm workers, and other classes of employees.
Trade paying about 60% of average. Manufacturing jobs generally paid more than the average, varying between 140% of average in 1980 to 124% of average by 2000.

Table B-7. Covered employment in Lane County, 1980-2000

<table>
<thead>
<tr>
<th>Sector</th>
<th>1980</th>
<th>1990</th>
<th>2000</th>
<th>Difference</th>
<th>Percent</th>
<th>AAGR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agriculture, Forestry &amp; Fishing</td>
<td>1,137</td>
<td>1,863</td>
<td>2,101</td>
<td>964</td>
<td>85%</td>
<td>2.5%</td>
</tr>
<tr>
<td>Mining</td>
<td>231</td>
<td>179</td>
<td>154</td>
<td>-77</td>
<td>-33%</td>
<td>-1.6%</td>
</tr>
<tr>
<td>Construction</td>
<td>4,600</td>
<td>3,992</td>
<td>6,834</td>
<td>2,234</td>
<td>49%</td>
<td>1.6%</td>
</tr>
<tr>
<td><strong>Manufacturing</strong></td>
<td><strong>19,638</strong></td>
<td><strong>20,654</strong></td>
<td><strong>23,658</strong></td>
<td><strong>4,020</strong></td>
<td><strong>20%</strong></td>
<td><strong>0.7%</strong></td>
</tr>
<tr>
<td>Trans., Comm., &amp; Utilities</td>
<td>3,836</td>
<td>3,750</td>
<td>3,845</td>
<td>9</td>
<td>0%</td>
<td>0.0%</td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td>5,578</td>
<td>5,900</td>
<td>6,422</td>
<td>844</td>
<td>15%</td>
<td>0.6%</td>
</tr>
<tr>
<td><strong>Retail Trade</strong></td>
<td><strong>20,299</strong></td>
<td><strong>24,429</strong></td>
<td><strong>28,758</strong></td>
<td><strong>8,459</strong></td>
<td><strong>42%</strong></td>
<td><strong>1.4%</strong></td>
</tr>
<tr>
<td>Finance, Insurance &amp; Real Estate</td>
<td>4,217</td>
<td>4,523</td>
<td>6,198</td>
<td>1,981</td>
<td>47%</td>
<td>1.6%</td>
</tr>
<tr>
<td><strong>Services</strong></td>
<td><strong>18,272</strong></td>
<td><strong>27,817</strong></td>
<td><strong>39,236</strong></td>
<td><strong>20,964</strong></td>
<td><strong>115%</strong></td>
<td><strong>3.1%</strong></td>
</tr>
<tr>
<td>Nonclassifiable/all others</td>
<td>13</td>
<td>50</td>
<td>37</td>
<td>24</td>
<td>185%</td>
<td>4.3%</td>
</tr>
<tr>
<td>Government</td>
<td>19,779</td>
<td>20,219</td>
<td>22,453</td>
<td>2,674</td>
<td>14%</td>
<td>0.5%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>97,600</strong></td>
<td><strong>113,376</strong></td>
<td><strong>139,696</strong></td>
<td><strong>42,096</strong></td>
<td><strong>43%</strong></td>
<td><strong>1.4%</strong></td>
</tr>
</tbody>
</table>

Table B-8 shows the change in covered employment by sector for Lane County between 2001 and 2007. Employment increased by 15,556 jobs or 11% during this period. The private sectors with the largest increases in numbers of employees were Administration Support and Cleaning, Retail Trade, Construction, and Health and Social Assistance. The sector that lost the greatest number of employees during this period was Agriculture, Forestry, Fishing and Mining.

Table B-8. Covered employment in Lane County, 2001-2007

<table>
<thead>
<tr>
<th>Sector</th>
<th>2001</th>
<th>2007</th>
<th>Difference</th>
<th>Percent</th>
<th>AAGR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Natural Resources and Mining</td>
<td>2,338</td>
<td>2,062</td>
<td>-276</td>
<td>-12%</td>
<td>-2.1%</td>
</tr>
<tr>
<td>Construction</td>
<td>6,366</td>
<td>8,034</td>
<td>1,668</td>
<td>26%</td>
<td>4.0%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>19,697</td>
<td>19,864</td>
<td>167</td>
<td>1%</td>
<td>0.1%</td>
</tr>
<tr>
<td>Wholesale</td>
<td>5,300</td>
<td>6,071</td>
<td>771</td>
<td>15%</td>
<td>2.3%</td>
</tr>
<tr>
<td>Retail</td>
<td>17,912</td>
<td>19,755</td>
<td>1,843</td>
<td>10%</td>
<td>1.6%</td>
</tr>
<tr>
<td>Transportation &amp; Warehousing</td>
<td>2,606</td>
<td>3,047</td>
<td>441</td>
<td>17%</td>
<td>2.6%</td>
</tr>
<tr>
<td>Information</td>
<td>3,729</td>
<td>3,901</td>
<td>172</td>
<td>5%</td>
<td>0.8%</td>
</tr>
<tr>
<td>Finance &amp; Insurance</td>
<td>3,963</td>
<td>4,313</td>
<td>350</td>
<td>9%</td>
<td>1.4%</td>
</tr>
<tr>
<td>Real Estate Rental &amp; Leasing</td>
<td>2,508</td>
<td>2,530</td>
<td>22</td>
<td>1%</td>
<td>0.1%</td>
</tr>
<tr>
<td>Professional, Scientific &amp; Tech. Srv.</td>
<td>5,571</td>
<td>5,658</td>
<td>87</td>
<td>2%</td>
<td>0.3%</td>
</tr>
<tr>
<td>Management of Companies</td>
<td>1,818</td>
<td>1,901</td>
<td>83</td>
<td>5%</td>
<td>0.7%</td>
</tr>
<tr>
<td>Admin. Support &amp; Cleaning Srv.</td>
<td>6,399</td>
<td>8,738</td>
<td>2,339</td>
<td>37%</td>
<td>5.3%</td>
</tr>
<tr>
<td>Education</td>
<td>1,067</td>
<td>1,389</td>
<td>322</td>
<td>30%</td>
<td>4.5%</td>
</tr>
<tr>
<td>Health &amp; Social Assistance</td>
<td>16,871</td>
<td>18,966</td>
<td>2,095</td>
<td>12%</td>
<td>2.0%</td>
</tr>
<tr>
<td>Arts, Entertainment &amp; Recreation</td>
<td>1,542</td>
<td>2,163</td>
<td>621</td>
<td>40%</td>
<td>5.8%</td>
</tr>
<tr>
<td>Accomodations &amp; Food Services</td>
<td>11,746</td>
<td>12,737</td>
<td>991</td>
<td>8%</td>
<td>1.4%</td>
</tr>
<tr>
<td>Other Services (except Public Admin.)</td>
<td>5,552</td>
<td>5,674</td>
<td>122</td>
<td>2%</td>
<td>0.4%</td>
</tr>
<tr>
<td>Private Non-Classified</td>
<td>49</td>
<td>45</td>
<td>-4</td>
<td>-8%</td>
<td>-1.4%</td>
</tr>
<tr>
<td>Government</td>
<td>22,398</td>
<td>24,133</td>
<td>1,735</td>
<td>8%</td>
<td>1.3%</td>
</tr>
</tbody>
</table>

Total 137,432 152,988 15,556 11% 2.7%


Table B-9 shows a summary of employment in Lane County in 2007. Table B-9 shows the ten largest sectors in bold are the top ten employers, sectors with below average pay per employee in red, and sectors with above average pay per employee in blue. Table B-8 shows:

- Construction, Manufacturing, Government, and Health and Social Assistance were among the sectors with the greatest employment in Lane County and have above average pay per employee. These sectors accounted for 47% of employment or nearly 71,000 employees in Lane County.
- Retail, Accommodations and Food Services, and Administration and Support and Waste Management were among the sectors with the greatest employment in Lane County and have below average pay per employee. These sectors accounted for 27% of employment or more than 41,000 employees in Lane County.
Table B-9. Covered employment in Lane County, 2007

<table>
<thead>
<tr>
<th>Sector/Industry</th>
<th>Establishments</th>
<th>Employment</th>
<th>Percent of Employment</th>
<th>Average Pay per Employee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Natural Resources &amp; Mining</td>
<td>228</td>
<td>2,062</td>
<td>1%</td>
<td>$34,662</td>
</tr>
<tr>
<td>Construction</td>
<td>1,249</td>
<td>8,034</td>
<td>5%</td>
<td>$41,346</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>599</td>
<td>19,864</td>
<td>13%</td>
<td>$41,055</td>
</tr>
<tr>
<td>Wood product manufacturing</td>
<td>76</td>
<td>4,548</td>
<td>3%</td>
<td>$42,423</td>
</tr>
<tr>
<td>Machinery manufacturing</td>
<td>51</td>
<td>1,816</td>
<td>1%</td>
<td>$48,027</td>
</tr>
<tr>
<td>Computer &amp; electronic product mfg.</td>
<td>20</td>
<td>1,934</td>
<td>1%</td>
<td>$56,594</td>
</tr>
<tr>
<td>Transportation equipment mfg.</td>
<td>31</td>
<td>4,093</td>
<td>3%</td>
<td>$31,942</td>
</tr>
<tr>
<td>Wholesale</td>
<td>588</td>
<td>6,071</td>
<td>4%</td>
<td>$44,609</td>
</tr>
<tr>
<td>Retail</td>
<td>1,276</td>
<td>19,755</td>
<td>13%</td>
<td>$24,258</td>
</tr>
<tr>
<td>Motor vehicle &amp; parts dealers</td>
<td>159</td>
<td>2,997</td>
<td>2%</td>
<td>$39,809</td>
</tr>
<tr>
<td>Building material &amp; garden supply stores</td>
<td>85</td>
<td>1,603</td>
<td>1%</td>
<td>$27,883</td>
</tr>
<tr>
<td>Food &amp; beverage stores</td>
<td>205</td>
<td>4,044</td>
<td>3%</td>
<td>$20,451</td>
</tr>
<tr>
<td>General merch&amp;ise stores</td>
<td>58</td>
<td>4,073</td>
<td>3%</td>
<td>$21,784</td>
</tr>
<tr>
<td>Miscellaneous store retailers</td>
<td>174</td>
<td>1,455</td>
<td>1%</td>
<td>$20,513</td>
</tr>
<tr>
<td>Transportation, Warehousing &amp; Utilities</td>
<td>267</td>
<td>3,047</td>
<td>2%</td>
<td>$37,448</td>
</tr>
<tr>
<td>Information</td>
<td>180</td>
<td>3,901</td>
<td>3%</td>
<td>$50,769</td>
</tr>
<tr>
<td>Finance &amp; Insurance</td>
<td>611</td>
<td>4,313</td>
<td>3%</td>
<td>$49,753</td>
</tr>
<tr>
<td>Real Estate Rental &amp; Leasing</td>
<td>566</td>
<td>2,530</td>
<td>2%</td>
<td>$25,994</td>
</tr>
<tr>
<td>Professional, Scientific &amp; Technical Svcs</td>
<td>1,004</td>
<td>5,658</td>
<td>4%</td>
<td>$41,314</td>
</tr>
<tr>
<td>Management of Companies</td>
<td>87</td>
<td>1,901</td>
<td>1%</td>
<td>$66,758</td>
</tr>
<tr>
<td>Admin. &amp; Support &amp; Waste Mgmt</td>
<td>484</td>
<td>8,738</td>
<td>6%</td>
<td>$21,771</td>
</tr>
<tr>
<td>Private Education</td>
<td>135</td>
<td>1,389</td>
<td>1%</td>
<td>$23,709</td>
</tr>
<tr>
<td>Health &amp; Social Assistance</td>
<td>971</td>
<td>18,966</td>
<td>13%</td>
<td>$39,836</td>
</tr>
<tr>
<td>Ambulatory health care services</td>
<td>598</td>
<td>6,453</td>
<td>4%</td>
<td>$52,408</td>
</tr>
<tr>
<td>Nursing &amp; residential care facilities</td>
<td>181</td>
<td>3,915</td>
<td>3%</td>
<td>$22,013</td>
</tr>
<tr>
<td>Arts, Entertainment &amp; Recreation</td>
<td>151</td>
<td>2,163</td>
<td>1%</td>
<td>$13,533</td>
</tr>
<tr>
<td>Accomodations &amp; Food Services</td>
<td>861</td>
<td>12,737</td>
<td>8%</td>
<td>$13,749</td>
</tr>
<tr>
<td>Other Services</td>
<td>1,322</td>
<td>5,674</td>
<td>4%</td>
<td>$22,345</td>
</tr>
<tr>
<td>Private Non-Classified</td>
<td>66</td>
<td>45</td>
<td>0%</td>
<td>$41,167</td>
</tr>
<tr>
<td>Government</td>
<td>376</td>
<td>24,133</td>
<td>16%</td>
<td>$39,312</td>
</tr>
<tr>
<td>Federal</td>
<td>70</td>
<td>1,764</td>
<td>1%</td>
<td>$57,977</td>
</tr>
<tr>
<td>State</td>
<td>61</td>
<td>6,878</td>
<td>5%</td>
<td>$39,498</td>
</tr>
<tr>
<td>Local</td>
<td>245</td>
<td>15,491</td>
<td>10%</td>
<td>$37,105</td>
</tr>
<tr>
<td>Education &amp; Health Services</td>
<td>147</td>
<td>8,547</td>
<td>6%</td>
<td>$31,343</td>
</tr>
<tr>
<td>Public Administration</td>
<td>49</td>
<td>4,268</td>
<td>3%</td>
<td>$47,464</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>11,019</strong></td>
<td><strong>150,982</strong></td>
<td><strong>100%</strong></td>
<td><strong>$34,328</strong></td>
</tr>
</tbody>
</table>


Notes: Sectors in **bold** are the top ten employers, sectors in **red** have below average pay per employee, and sectors in **blue** have above average pay per employee.

**Lane County business clusters**

One way to assess the types of businesses that are likely to have future growth in an area is to examine relative concentration and employment growth of existing businesses. This method of analysis can help determine relationships and linkages within industries, also called industrial clusters. Sectors that are highly concentrated (meaning there are more than the “average” number of businesses in a sector in a given area) and have had high employment growth are likely to be successful industrial cluster. Sectors with either high concentration of businesses or high
employment growth may be part of an emerging cluster, with potential for future growth.

The Oregon Economic and Community Development Department (OECDD) prepared a report titled “Oregon’s Traded Clusters: Major Industries and Trends.” This report identified 25 clusters in Lane County.

- **Business Services.** This cluster is dominated by Professional, Scientific, and Technical Services and Employment Services. The average annual wage varies by sector, with the highest pay in Professional, Scientific, and Technical Services (about $51,800). Employment growth in these industries was moderate to fast between 2003 and 2005. Business Services firms may be attracted to Eugene as a result of firms located in Eugene, the availability of educated workers within the region, and the high quality of life and access to recreation in Eugene.

- **Communication Equipment** This cluster includes manufacturing and wholesaling of computer, communications, and audio and video equipment. Lane County has clusters of both manufacturing and wholesaling communication equipment but the manufacturing cluster is bigger in the County. Employment growth in the cluster was fastest in computer and peripheral manufacturing between 2003 and 2005. The average annual wage in this sector is higher than the State average, at $68,076. Firms in this cluster may be attracted to Eugene as a result of the City’s location and access to transportation, the availability of educated workers within the region, and the high quality of life and access to recreation in the region.

- **Information Technology.** This cluster includes Telecommunications, Software Publishers, and Internet Service Providers. The average annual wage was above State averages. Growth in the cluster varied between 2003 and 2005, with a decrease in Telecommunications employment and increases in employment with Internet Service Providers. Information Technology firms may be attracted to Eugene because of the availability of educated workers within the region and the high quality of life and access to recreation in Eugene. Eugene may be attractive as a location to outsource back-office functions for larger Information Technology firms.

- **Logistics and Distribution.** This cluster includes truck transportation and warehousing. This cluster grew during the 2003-2005 period, with the greatest growth in Truck Transportation. Wages in this cluster were similar to State averages. Firms in this
cluster may be attracted to Eugene as a result of the City’s location relative to other cities in the Willamette Valley and Oregon and the access to transportation via I-5 and Highways 99 and 126.

- **Medical products.** This cluster includes medical and equipment supplies manufacturing. This sector has higher than average wages and had moderate employment growth during the 2003 to 2005 period. Firms may be attracted to Eugene as a result of firms located in Eugene, the availability of educated workers within the region, and the high quality of life and access to recreation in Eugene.

- **Metals and Related Products.** This cluster includes metals manufacturing, including Fabricated Metals Manufacturing and Primary Metals Manufacturing. Although employment decreased in this cluster over the 2003-2005 period, Lane County has the largest cluster of Metal Wholesalers outside of the Portland metropolitan area. Wages in this cluster were generally at or above State averages. Firms may be attracted to Eugene as a result of existing businesses and the availability of labor.

- **Processed Foods and Beverages.** This cluster includes manufacturing of food and beverages. Employment in this cluster decreased over the 2003-2005 period and average wages in this cluster are at or below State averages. Firms may be attracted to Eugene as a result of the City’s proximity to food growers and the availability of labor.

- **Wood and Other Forest Products.** This cluster includes wood product manufacturing, logging, paper making, and support activities. The average annual wage was below State averages and employment grew slowly within the cluster over the 2003-2005 period. Firms may be attracted to Eugene as a result of the City’s proximity to natural resources and the availability of labor.

### Employment in Eugene

Table B-10 shows a summary of confidential employment data for Eugene in 2006. Eugene had 91,002 jobs at 6,789 establishments in 2006, with an average firm size of 13 employees. The sectors with the greatest employees were: Government (16%), Health Care and Social Assistance (14%), Retail (14%), and Manufacturing (12%). These sectors accounted for 57,759 or 63% of Eugene’s jobs.
Table B-10. Covered employment in Eugene, 2006

<table>
<thead>
<tr>
<th>Sector / Industry</th>
<th>Establishments</th>
<th>Employees</th>
<th>% of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agriculture, Forestry, Fishing &amp; Hunting</td>
<td>27</td>
<td>239</td>
<td>0%</td>
</tr>
<tr>
<td>Construction</td>
<td>558</td>
<td>3,433</td>
<td>4%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wood Product Manufacturing</td>
<td>35</td>
<td>2,449</td>
<td>3%</td>
</tr>
<tr>
<td>Computer and Electronic Product Manufacturing</td>
<td>12</td>
<td>1,841</td>
<td>2%</td>
</tr>
<tr>
<td>Machinery Manufacturing</td>
<td>39</td>
<td>1,227</td>
<td>1%</td>
</tr>
<tr>
<td>Food Manufacturing</td>
<td>42</td>
<td>963</td>
<td>1%</td>
</tr>
<tr>
<td>Other Manufacturing</td>
<td>243</td>
<td>4,199</td>
<td>5%</td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td>406</td>
<td>4,046</td>
<td>4%</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>800</td>
<td>12,390</td>
<td>14%</td>
</tr>
<tr>
<td>General Merchandise Stores</td>
<td>31</td>
<td>2,479</td>
<td>3%</td>
</tr>
<tr>
<td>Food and Beverage Stores</td>
<td>121</td>
<td>2,337</td>
<td>3%</td>
</tr>
<tr>
<td>Motor Vehicle and Parts Dealers</td>
<td>86</td>
<td>1,744</td>
<td>2%</td>
</tr>
<tr>
<td>Building Material &amp; Garden Equipment &amp; Supplies Dealers</td>
<td>51</td>
<td>1,274</td>
<td>1%</td>
</tr>
<tr>
<td>Clothing and Clothing Accessories Stores</td>
<td>100</td>
<td>1,051</td>
<td>1%</td>
</tr>
<tr>
<td>Other Retail Trade</td>
<td>411</td>
<td>3,505</td>
<td>4%</td>
</tr>
<tr>
<td>Transportation &amp; Warehousing &amp; Utilities</td>
<td>109</td>
<td>1,195</td>
<td>1%</td>
</tr>
<tr>
<td>Information</td>
<td>121</td>
<td>1,954</td>
<td>2%</td>
</tr>
<tr>
<td>Finance &amp; Insurance</td>
<td>444</td>
<td>2,880</td>
<td>3%</td>
</tr>
<tr>
<td>Real Estate &amp; Rental &amp; Leasing</td>
<td>346</td>
<td>1,651</td>
<td>2%</td>
</tr>
<tr>
<td>Professional, Scientific, and Technical Services</td>
<td>787</td>
<td>4,780</td>
<td>5%</td>
</tr>
<tr>
<td>Management of Companies and Enterprises</td>
<td>54</td>
<td>1,202</td>
<td>1%</td>
</tr>
<tr>
<td>Admin. &amp; Support &amp; Waste Mgt. &amp; Remediation Srv.</td>
<td>289</td>
<td>5,414</td>
<td>6%</td>
</tr>
<tr>
<td>Private Educational Services</td>
<td>110</td>
<td>1,203</td>
<td>1%</td>
</tr>
<tr>
<td>Health Care &amp; Social Assistance</td>
<td>712</td>
<td>13,120</td>
<td>14%</td>
</tr>
<tr>
<td>Ambulatory Health Care Services</td>
<td>456</td>
<td>7,447</td>
<td>8%</td>
</tr>
<tr>
<td>Social Assistance</td>
<td>137</td>
<td>2,220</td>
<td>2%</td>
</tr>
<tr>
<td>Nursing and Residential Care Facilities</td>
<td>96</td>
<td>2,142</td>
<td>2%</td>
</tr>
<tr>
<td>Hospitals</td>
<td>23</td>
<td>1,311</td>
<td>1%</td>
</tr>
<tr>
<td>Arts, Entertainment, &amp; Recreation</td>
<td>81</td>
<td>1,357</td>
<td>1%</td>
</tr>
<tr>
<td>Accommodation &amp; Food Services</td>
<td>521</td>
<td>7,421</td>
<td>8%</td>
</tr>
<tr>
<td>Food Services and Drinking Places</td>
<td>470</td>
<td>6,544</td>
<td>7%</td>
</tr>
<tr>
<td>Accommodation</td>
<td>51</td>
<td>877</td>
<td>1%</td>
</tr>
<tr>
<td>Other Services (except Public Administration)</td>
<td>868</td>
<td>3,889</td>
<td>4%</td>
</tr>
<tr>
<td>Government</td>
<td>185</td>
<td>14,149</td>
<td>16%</td>
</tr>
<tr>
<td>Federal Government</td>
<td>26</td>
<td>1,096</td>
<td>1%</td>
</tr>
<tr>
<td>State Government</td>
<td>25</td>
<td>5,225</td>
<td>6%</td>
</tr>
<tr>
<td>Local Government</td>
<td>134</td>
<td>7,828</td>
<td>9%</td>
</tr>
<tr>
<td>Educational Services</td>
<td>68</td>
<td>3,179</td>
<td>3%</td>
</tr>
<tr>
<td>Other Local Government</td>
<td>66</td>
<td>4,649</td>
<td>5%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>6,789</strong></td>
<td><strong>91,002</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>

Source: Oregon Employment Department Quarterly Census of Employment and Wages (QCEW). Summary by industry and percentages calculated by ECONorthwest
Regional business activity

Eugene exists within the Eugene-Springfield regional economy. Regional business activity and trends will affect the types of businesses that are attracted to the region and choose to locate in Eugene. This section presents the large-scale regional business activities.

Continued Importance of manufacturing

Manufacturing is a traded sector industry, which brings revenue into Oregon and Lane County from outside the State. The following manufacturing industries accounted for two-thirds ($19.4 billion) of revenue from exports in Oregon in 2008: Computer & Electronic Production, Machinery Manufacturers, and Transportation Equipment. These industries are all present in Lane County, accounting for 40% of manufacturing employment in the County.

Manufacturing continues to be important to the economy in Eugene and in Lane County. Manufacturing accounted for 14% of employment (more than 20,000 jobs) in Lane County and 12% of employment (more than 10,600 jobs) in Eugene in 2006. Manufacturing industries continue to offer jobs with above-average wages, making these jobs more desirable.

Employment growth in manufacturing was flat between 1980 and 2006, with manufacturing employment of about 19,500 jobs. Manufacturing employment peaked around the year 2000, with about 23,600 employees. The State forecasts growth in manufacturing of about 0.3% per year over the 2006 to 2016 period, adding about 700 employees.

Continuing changes in the economy may impact manufacturing in Lane County. For example, the economic downturn and high energy prices were factors that contributed to the decrease of RV manufacturing in Lane County, which has resulted in the layoff of employees beginning in 2006. In addition, the economic downturn and consolidation of the paper manufacturing industry may result in layoffs in firms that manufacture wood products and paper.

Although much of the employment in these industries is located outside of Eugene, it affects residents of Eugene, either directly through job layoffs or indirectly through decreases in economic activity.

59 “Economic Data Packet, April 2009,” Oregon Economic And Community Development Department

60 Oregon Employment Department
Tourism in Lane County

Tourism brings economic activity into Lane County from outside sources. Tourism expenditures in Lane County in 2006 grew 7.5%, to $553 million, exceeding the statewide tourism growth rate for the year. Tourism accounts for about 7,500 jobs in Lane County.

In 2008, the Eugene-Springfield Region had 3,118 total rooms. Since 1997, 629 limited service hotel rooms were added. During the same period, 377 full service rooms, 92 limited service rooms, and 15,464 square feet of meeting space have closed.61

Figure B-15 shows the hotel occupancy rate in the Eugene-Springfield Region from fiscal year 1998 to fiscal year 2008. The Region’s occupancy rate varied from 59% in fiscal year 2002 and 2003 to 72% in fiscal year 2006.

Figure B-15. Hotel room occupancy rate, Eugene-Springfield Region, Fiscal Years 1998 to 2008

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61 Convention & Visitors Association of Lane County Oregon, CVALCO
Full service hotels include services such as room service or concierge services, while limited service hotels have fewer services.
Eugene levies a 9.5% transient lodging tax on overnight accommodations. Table B-11 shows transient lodging tax revenue for Lane County and Eugene for fiscal year 2000 through 2008. Eugene’s lodging tax revenue varied from $2.3 million in fiscal year 2000 to over $3.5 million in fiscal year 2007. Eugene’s transient lodging tax revenues accounted for over half of total County revenues in every year after 2000.

Table B-11. Local lodging tax revenues, Lane County and Eugene, Fiscal Years 2000 to 2008

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Lane County</th>
<th>Eugene</th>
<th>Eugene’s % of County</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>$4,753,583</td>
<td>$2,294,721</td>
<td>48%</td>
</tr>
<tr>
<td>2001</td>
<td>$4,834,210</td>
<td>$2,451,906</td>
<td>51%</td>
</tr>
<tr>
<td>2002</td>
<td>$4,865,320</td>
<td>$2,524,577</td>
<td>52%</td>
</tr>
<tr>
<td>2003</td>
<td>$4,820,662</td>
<td>$2,430,559</td>
<td>50%</td>
</tr>
<tr>
<td>2004</td>
<td>$5,095,869</td>
<td>$2,742,012</td>
<td>54%</td>
</tr>
<tr>
<td>2005</td>
<td>$5,378,361</td>
<td>$2,876,024</td>
<td>53%</td>
</tr>
<tr>
<td>2006</td>
<td>$6,016,364</td>
<td>$3,136,485</td>
<td>52%</td>
</tr>
<tr>
<td>2007</td>
<td>$6,611,718</td>
<td>$3,529,159</td>
<td>53%</td>
</tr>
<tr>
<td>2008</td>
<td>$5,103,490</td>
<td>$2,703,682</td>
<td>53%</td>
</tr>
</tbody>
</table>

Source: Convention & Visitors Association of Lane County Oregon, CVALCO
Note: 2008 data current through March 2008

Significance of agriculture in Lane County

Agriculture continues to be important in Lane County’s economy. Table B-12 shows the market value of agricultural products and the top five agricultural products in Lane County in 2002 and 2007. In 2007, Lane County had approximately $131 million in total gross sales from agriculture, a nearly 50% increase over the $88 million in total gross sales in 2002.

The top five agricultural products in Lane County in 2007 were: Nursery and greenhouse ($33 million); fruits, tree nuts, and berries ($13.8 million); poultry and eggs ($12.8 million); milk and dairy ($11.1 million); and cattle and calves ($9.9 million). The agricultural products that had the largest increase in sales between 2002 and 2007 were nursery and greenhouse (increase of $11.8 million or 56%) and fruits, tree nuts, and berries (increase of $7.1 million or 107%).
Table B-12. Six agricultural products with the highest sales value, Lane County 2002 and 2007

<table>
<thead>
<tr>
<th>Item</th>
<th>Value of Sales</th>
<th>Farms</th>
<th>Average Value of Sales per Farm</th>
</tr>
</thead>
<tbody>
<tr>
<td>2007 Total Sales</td>
<td>$131,089,000</td>
<td>3,355</td>
<td>$39,073</td>
</tr>
<tr>
<td>Nursery, greenhouse, floriculture, &amp; sod</td>
<td>$32,810,000</td>
<td>204</td>
<td>$160,833</td>
</tr>
<tr>
<td>Fruits, tree nuts, &amp; berries</td>
<td>$13,811,000</td>
<td>339</td>
<td>$40,740</td>
</tr>
<tr>
<td>Poultry &amp; eggs</td>
<td>$12,794,000</td>
<td>433</td>
<td>$29,547</td>
</tr>
<tr>
<td>Milk &amp; other dairy products from cows</td>
<td>$11,135,000</td>
<td>32</td>
<td>$347,969</td>
</tr>
<tr>
<td>Cattle &amp; calves</td>
<td>$9,895,000</td>
<td>929</td>
<td>$10,651</td>
</tr>
<tr>
<td>Vegetables, melons, potatoes, &amp; sweet potatoes</td>
<td>$5,743,000</td>
<td>110</td>
<td>$52,209</td>
</tr>
<tr>
<td>2002 Total Sales</td>
<td>$87,824,000</td>
<td>2,577</td>
<td>$34,080</td>
</tr>
<tr>
<td>Nursery, greenhouse, floriculture, &amp; sod</td>
<td>$21,001,000</td>
<td>208</td>
<td>$100,966</td>
</tr>
<tr>
<td>Milk &amp; other dairy products from cows</td>
<td>$10,290,000</td>
<td>9</td>
<td>$1,143,333</td>
</tr>
<tr>
<td>Cattle &amp; calves</td>
<td>$7,622,000</td>
<td>779</td>
<td>$9,784</td>
</tr>
<tr>
<td>Fruits, tree nuts, &amp; berries</td>
<td>$6,883,000</td>
<td>382</td>
<td>$17,495</td>
</tr>
<tr>
<td>Vegetables, melons, potatoes, &amp; sweet potatoes</td>
<td>$5,955,000</td>
<td>155</td>
<td>$38,419</td>
</tr>
<tr>
<td>Poultry &amp; eggs</td>
<td>$5,919,000</td>
<td>218</td>
<td>$27,151</td>
</tr>
</tbody>
</table>


While agriculture is an important source of economic activity in Lane County, Eugene has relatively little employment directly involved with agriculture within the UGB. In 2006, less than 1% of Eugene’s covered employment (239 employees) were employed in the Agriculture, Forestry, Fishing, and Mining sectors. About half of these jobs were in Forestry and Logging.

Consistent with statewide land use policy, land within the Eugene UGB is committed for future urban uses, rather than agricultural uses. The types of natural resource related jobs that might locate in Eugene include: agricultural services, food processors, wineries and breweries, and manufacturers that depend on natural resources (e.g., lumber mills, furniture manufacturing, or fabricated metal products).

**Sustainability**

The Oregon Employment Department’s (OED) *The Greening of Oregon’s Workforce* report details the growth of green or sustainable jobs in the Oregon economy in recent years. Oregon had over 51,000 green jobs in 2008, or 3% of the statewide total. The OED notes that these jobs are not in confined green industry sectors; they are spread across the entire economy. Oregon industries with the largest number of green jobs were construction, wholesale and retail trade, and administrative and waste services. These sectors are feasible in any region.
The idea of “attracting sustainable jobs” usually focuses more on attracting green firms to an area, though green jobs are emerging from industries that are already present in Lane County. Demand for green services will alter the mix of services offered by existing businesses and ultimately drive the growth of green jobs in the County. The effects are difficult to isolate on a small regional level, though the growth of green jobs on a statewide level appears to be healthy.62

**Domestic outsourcing**

The trend towards domestic outsourcing of back-office functions has led several companies to locate call centers in the Eugene-Springfield area. Companies that have located call centers or back-office functions in the Eugene-Springfield region include: Levi Strauss, Symantec, Enterprise, and Royal Caribbean. The Eugene-Springfield’s trained labor pool of relatively low-cost workers for call centers gives the region an advantage for attracting additional call centers.

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Outlook for growth in Eugene

Table B-13 shows the population forecast developed by the Office of Economic Analysis for Oregon and Lane County for 2000 through 2040. Lane County is forecast to grow at a slower rate than Oregon over the 2005 to 2030 period. The forecast shows Lane County’s population will grow by about 96,600 people over the 25-year period, a 29% increase. Over the same period, Oregon is forecast to grow by more than 1.2 million people, a 35% increase.

Table B-13. State population forecast, Oregon and Lane County, 2000 to 2040

<table>
<thead>
<tr>
<th>Year</th>
<th>Oregon</th>
<th>Lane County</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>3,436,750</td>
<td>323,950</td>
</tr>
<tr>
<td>2005</td>
<td>3,618,200</td>
<td>333,855</td>
</tr>
<tr>
<td>2010</td>
<td>3,843,900</td>
<td>347,494</td>
</tr>
<tr>
<td>2015</td>
<td>4,095,708</td>
<td>365,639</td>
</tr>
<tr>
<td>2020</td>
<td>4,359,258</td>
<td>387,574</td>
</tr>
<tr>
<td>2025</td>
<td>4,626,015</td>
<td>409,159</td>
</tr>
<tr>
<td>2030</td>
<td>4,891,225</td>
<td>430,454</td>
</tr>
<tr>
<td>2035</td>
<td>5,154,793</td>
<td>451,038</td>
</tr>
<tr>
<td>2040</td>
<td>5,425,408</td>
<td>471,511</td>
</tr>
</tbody>
</table>

Change 2005 to 2030

| Amount | 1,273,025 | 96,599 |
| % Change | 35% | 29% |
| AAGR | 1.2% | 1.0% |


Lane County has adopted a population forecast for Eugene. The forecast projects that population in the Eugene UGB will grow from 179,338 people in 2011 to 213,238 people in 2031, an increase of 33,900 people at 0.88% average annual growth.
Table B-14 shows the Oregon Employment Department’s forecast for employment growth by industry for Lane County over the 2006 to 2016 period. The sectors that will lead employment growth in Lane County for the ten-year period are Health Care & Social Assistance (adding 5,600 jobs), Government (adding 3,600 jobs), Professional and Business Services (adding 3,000 jobs), Leisure & Hospitality (adding 2,800 jobs), and Retail Trade (adding 2,400 jobs). Together, these sectors are expected to add 17,400 new jobs or 76% of employment growth in Lane County.

Table B-14. Nonfarm employment forecast by industry in Lane County, 2006-2016

<table>
<thead>
<tr>
<th>Sector / Industry</th>
<th>2006</th>
<th>2016</th>
<th>Amount</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Natural resources &amp; Mining</td>
<td>900</td>
<td>900</td>
<td>0</td>
<td>0%</td>
</tr>
<tr>
<td>Construction</td>
<td>8,000</td>
<td>9,200</td>
<td>1,200</td>
<td>15%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>20,300</td>
<td>21,000</td>
<td>700</td>
<td>3%</td>
</tr>
<tr>
<td>Durable Goods</td>
<td>16,300</td>
<td>16,900</td>
<td>600</td>
<td>3%</td>
</tr>
<tr>
<td>Wood product mfg.</td>
<td>4,700</td>
<td>4,500</td>
<td>-200</td>
<td>-4%</td>
</tr>
<tr>
<td>Transportation equip. mfg.</td>
<td>4,400</td>
<td>4,700</td>
<td>300</td>
<td>7%</td>
</tr>
<tr>
<td>Nondurable goods</td>
<td>4,000</td>
<td>4,100</td>
<td>100</td>
<td>3%</td>
</tr>
<tr>
<td>Transportation, &amp; utilities</td>
<td>3,300</td>
<td>3,700</td>
<td>400</td>
<td>12%</td>
</tr>
<tr>
<td>Wholesale trade</td>
<td>5,900</td>
<td>6,500</td>
<td>600</td>
<td>10%</td>
</tr>
<tr>
<td>Retail trade</td>
<td>19,700</td>
<td>22,100</td>
<td>2,400</td>
<td>12%</td>
</tr>
<tr>
<td>Information</td>
<td>3,700</td>
<td>4,100</td>
<td>400</td>
<td>11%</td>
</tr>
<tr>
<td>Financial activities</td>
<td>8,300</td>
<td>9,300</td>
<td>1,000</td>
<td>12%</td>
</tr>
<tr>
<td>Professional &amp; business srv.</td>
<td>16,100</td>
<td>19,100</td>
<td>3,000</td>
<td>19%</td>
</tr>
<tr>
<td>Administrative &amp; support srv.</td>
<td>8,200</td>
<td>9,700</td>
<td>1,500</td>
<td>18%</td>
</tr>
<tr>
<td>Education</td>
<td>1,500</td>
<td>1,900</td>
<td>400</td>
<td>27%</td>
</tr>
<tr>
<td>Health care &amp; social assist.</td>
<td>18,100</td>
<td>23,700</td>
<td>5,600</td>
<td>31%</td>
</tr>
<tr>
<td>Health care</td>
<td>15,400</td>
<td>20,500</td>
<td>5,100</td>
<td>33%</td>
</tr>
<tr>
<td>Leisure &amp; hospitality</td>
<td>14,200</td>
<td>17,000</td>
<td>2,800</td>
<td>20%</td>
</tr>
<tr>
<td>Accommodation &amp; food srv.</td>
<td>12,100</td>
<td>14,300</td>
<td>2,200</td>
<td>18%</td>
</tr>
<tr>
<td>Food srv. &amp; drinking places</td>
<td>10,700</td>
<td>12,700</td>
<td>2,000</td>
<td>19%</td>
</tr>
<tr>
<td>Other srv.</td>
<td>5,100</td>
<td>5,700</td>
<td>600</td>
<td>12%</td>
</tr>
<tr>
<td>Government</td>
<td>28,400</td>
<td>32,000</td>
<td>3,600</td>
<td>13%</td>
</tr>
<tr>
<td>Federal government</td>
<td>1,800</td>
<td>1,700</td>
<td>-100</td>
<td>-6%</td>
</tr>
<tr>
<td>State government</td>
<td>11,300</td>
<td>13,200</td>
<td>1,900</td>
<td>17%</td>
</tr>
<tr>
<td>State education</td>
<td>8,700</td>
<td>10,200</td>
<td>1,500</td>
<td>17%</td>
</tr>
<tr>
<td>Local government</td>
<td>15,400</td>
<td>17,100</td>
<td>1,700</td>
<td>11%</td>
</tr>
<tr>
<td>Local education</td>
<td>8,600</td>
<td>9,300</td>
<td>700</td>
<td>8%</td>
</tr>
<tr>
<td><strong>Total nonfarm employment</strong></td>
<td>153,400</td>
<td>176,100</td>
<td>22,700</td>
<td>15%</td>
</tr>
</tbody>
</table>

B.3.2 IMPLICATIONS OF NATIONAL AND STATE AND REGIONAL TRENDS ON ECONOMIC DEVELOPMENT WITHIN EUGENE

This section presents the implications of national, state, and regional economic trends on economic growth in Eugene.

Table B-28. Implications of national, state, and regional economic and demographic trends on economic growth in Eugene

<table>
<thead>
<tr>
<th>National, State, and Regional Economic Trends</th>
<th>Implications for economic growth in Eugene</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Effects of the national recession</strong></td>
<td>The national recession is likely to result in slower than average employment growth in Eugene over the next two to five years. The higher levels of unemployment and slow employment growth are likely to slow growth in wages over the next two to five years throughout Oregon, including in Eugene.</td>
</tr>
<tr>
<td>The national recession that started at the end of 2007 has affected businesses and workers alike. Unemployment at the national level has been at or above 9% since January 2009, with Oregon’s unemployment rate at or above 10% since January 2009. The federal government’s economic forecast suggests slow economic growth, with gradual increases of employment starting in the second quarter of 2010 and continuing through 2011. Economic growth in Oregon typically lags behind national growth.</td>
<td></td>
</tr>
<tr>
<td><strong>Growth of service-oriented sectors</strong></td>
<td>The changes in employment in Lane County have followed similar trends as changes in national and state employment. The sectors with the greatest change in share of employment since 1980 were Services, adding more than 45,500 or 85% of new jobs. Industrial sectors and Government added more than 8,000 jobs, accounting for about 15% of new jobs. Oregon Employment Department forecasts that the sectors likely to have the most employment growth over the 2006 to 2016 period are: Health Care &amp; Social Assistance, Local and State Government, Retail Trade, Professional and Business Service, and Accommodation and Food Services. These sectors represent employment opportunities for Lane County.</td>
</tr>
<tr>
<td>Increased worker productivity and the international outsourcing of routine tasks led to declines in employment in the major goods-producing industries. Projections from the Bureau of Labor Statistics indicate that U.S. employment growth will continue to be strongest in healthcare and social assistance, professional and business services, and other service industries. Construction employment will grow with the economy but manufacturing employment will decline. These trends are also expected to affect the composition of Oregon’s economy.</td>
<td></td>
</tr>
<tr>
<td>National, State, and Regional Economic Trends</td>
<td>Implications for economic growth in Eugene</td>
</tr>
<tr>
<td>---------------------------------------------</td>
<td>-------------------------------------------</td>
</tr>
<tr>
<td><strong>Lack of diversity in Oregon's economy</strong></td>
<td>Employment in Eugene is concentrated in a few sectors: Government, Health Care and Social Assistance, Retail Trade, and Manufacturing. Employment in the government and health care sectors tends to be stable, well-paying employment. Employment in Manufacturing is generally well-paying but may be volatile. Eugene's employment in traded-sectors is concentrated in Government (the University of Oregon), Health Care, Manufacturing and Professional Services. Opportunities for growth of traded-sector employment include: manufacturing of “green” products, specialty food processing; high tech; traded-sector services; and forest products.</td>
</tr>
<tr>
<td>Oregon’s economy has diversified since the 1960’s but Oregon continues to rank low in economic diversity among states. A recent analysis, based on 2007 data, ranked Oregon 31st. These rankings suggest that Oregon is still heavily dependent on a limited number of industries. Relatively low economic diversity increases the risk of economic volatility as measured by changes in output or employment.</td>
<td></td>
</tr>
<tr>
<td><strong>Importance of small businesses in Oregon's economy</strong></td>
<td>Businesses with 100 or fewer employees account for 70% of private employment in Eugene. Businesses with 9 or fewer employees account for 18% of private employment in Eugene. Growth of small businesses presents opportunities for economic growth in Eugene.</td>
</tr>
<tr>
<td>Small business, with 100 or fewer employees, account for 51% of private sector employment in Oregon. Workers of small businesses typically have had lower wages than the state average.</td>
<td></td>
</tr>
<tr>
<td><strong>Availability of trained and skilled labor</strong></td>
<td>Employment in Lane County grew at about 1.7% annually over the 1990 to 2007 period, while population grew at about 1.1% over the same period. Eugene’s population, however, grew at 1.8% annually over the 18 year period. This growth pattern is consistent with Eugene’s status as the regional employment center. Eighty-five percent of workers in the Eugene lived in Lane County, with nearly half of workers living within Eugene. Firms in Eugene attracted workers from the Willamette Valley, from Portland southward. Eugene’s residents were more likely to have a Bachelor’s degree or higher (41%) than the State average (28%).</td>
</tr>
<tr>
<td>Businesses in Oregon are generally able to fill jobs, either from available workers living within the State or by attracting skilled workers from outside of the State. Availability of labor depends, in part, on population growth and in-migration. Oregon added more than 980,000 new residents and about 475,000 new jobs between 1990 and 2008. The population-employment ratio for the State was about 1.6 residents per job over the 18-year period. Availability of labor also depends on workers’ willingness to commute. Workers in Oregon typically have a commute that is 30 minutes or shorter. Availability of skilled workers depends, in part, on education attainment. About 28% of Oregon’s workers have a Bachelor’s degree or higher.</td>
<td></td>
</tr>
<tr>
<td>National, State, and Regional Economic Trends</td>
<td>Implications for economic growth in Eugene</td>
</tr>
<tr>
<td>---------------------------------------------</td>
<td>------------------------------------------</td>
</tr>
<tr>
<td><strong>Aging of the population</strong> The number of people age 65 and older will more than double between 2010 and 2050, while the number of people under age 65 will grow only 20 percent. The economic effects of this demographic change include a slowing of the growth of the labor force, an increase in the demand for healthcare services, and an increase in the percent of the federal budget dedicated to Social Security and Medicare. People are retiring later than previous generations, continuing to work past 65 years old. This trend is seen both at the national and State levels. Even given this trend, the need for workers to replace retiring baby boomers will outpace job growth. Management occupations and teachers will have the greatest need for replacement workers because these occupations have older-than-average workforce.</td>
<td>The changes in the age structure in Eugene are similar to the State, with the most growth in people 45 years and older. Eugene had a larger share of people aged 20 to 29 and a smaller share of people between 40 and 69 years than the State average. The State projects the share of the population over the age of 60 in Lane County will double between 2000 and 2030. Firms in Eugene will need to replace workers as they retire. Demand for replacement workers is likely to outpace job growth in Eugene, consistent with State trends.</td>
</tr>
<tr>
<td><strong>Increases in energy prices</strong> Energy prices are forecast to return to relatively high levels, such as those seen in the 2006 to 2008 period, possibly increasing further over the planning period.</td>
<td>Increases in energy prices are likely to affect the mode of commuting before affecting workers' willingness to commute. For example, commuters may choose to purchase a more energy efficient car, use the train, bus, or carpool. Very large increases in energy prices may affect workers' willingness to commute, especially workers living the furthest from Eugene or workers with lower paying jobs.</td>
</tr>
<tr>
<td>National, State, and Regional Economic Trends</td>
<td>Implications for economic growth in Eugene</td>
</tr>
<tr>
<td>---------------------------------------------</td>
<td>---------------------------------------------</td>
</tr>
<tr>
<td><strong>Comparatively low wages</strong>&lt;br&gt;The income of a region affects the workforce and the types of businesses attracted to the region. Average income affects workers and businesses in different ways. Workers may be attracted to a region with higher average wage or high wage jobs. Businesses, however, may prefer to locate in regions with lower wages, where the cost of doing business may be lower.&lt;br&gt;Since the early 1980’s, Oregon's per capita personal income has been consistently lower than the U.S. average. In 2007, Oregon’s per capita wage was 91% of the national average.</td>
<td>Per capita income in Lane County was lower than the State and national averages.&lt;br&gt;Income in Oregon has historically been below national averages and income in Lane County has been below state averages. There are four basic reasons that income has been lower in Oregon and Lane County than in the U.S.: (1) wages for similar jobs are lower; (2) the occupational mix of employment is weighted towards lower paying occupations; (3) a higher proportion of the population has transfer payments (e.g. social security payments for retirees), which are typically lower than earnings; and (4) lower labor force participation among working age residents. To a certain degree, these factors are all true for both Oregon and Lane County and result in lower income.&lt;br&gt;In addition, wages in Lane County and Oregon tend to be more volatile than the national average. The major reason for this volatility is that the relative lack of diversity in the State and County economy. Wages in Oregon and Lane County are impacted more than the national average by downturns in either the national economy or in industries in Oregon and Lane County that are dependent on natural resources (e.g., timber and wood processing or R.V. manufacturing).&lt;br&gt;The lower wages in the Eugene may be attractive to firms that typically pay lower wages, such as call centers or firms that outsource professional services such as accounting or technical support.</td>
</tr>
<tr>
<td><strong>Education as a determinant of wages</strong>&lt;br&gt;The majority of the fastest growing occupations will require an academic degree, and on average they will yield higher incomes than occupations that do not require an academic degree. The fastest growing of occupations requiring an academic degree will be: computer software application engineers, elementary school teachers, and accountants and auditors. Occupations that do not require an academic degree (e.g., retail sales person, food preparation workers, and home care aides) will grow, accounting for about half of all jobs by 2018. These occupations typically have lower pay than occupations requiring an academic degree.</td>
<td>Eugene’s residents were more likely to have a Bachelor’s degree or higher (41%) than the State average (28%).&lt;br&gt;The relatively low wages in Eugene are the result of the composition of the regional economy, rather than the availability of workers with an academic degree. Increasing the relatively low wages in the region are dependent on changing the composition of the regional economy, through growing or attracting businesses with higher paying occupations.</td>
</tr>
</tbody>
</table>
### Importance of high quality natural resources

The relationship between natural resources and local economies has changed as the economy has shifted away from resource extraction. Increases in the population and in households’ incomes, plus changes in tastes and preferences, have dramatically increased demands for outdoor recreation, scenic vistas, clean water, and other resource-related amenities. Such amenities contribute to a region’s quality of life and play an important role in attracting both households and firms.

### Implications for economic growth in Eugene

The region’s high quality natural resources present economic growth opportunities for Eugene, ranging from food and beverage production to amenities that attract visitors and contribute to the region’s high quality of life.
B.4 FACTORS AFFECTING FUTURE ECONOMIC GROWTH IN EUGENE

Each economic region has different combinations of productive factors: land (and natural resources), labor (including technological expertise), and capital (investments in infrastructure, technology, and public services). While all areas have these factors to some degree, the mix and condition of these factors vary. The mix and condition of productive factors may allow firms in a region to produce goods and services more cheaply, or to generate more revenue, than firms in other regions.

By affecting the cost of production and marketing, competitive advantages affect the pattern of economic development in a region relative to other regions. Goal 9 and OAR 660-009-0015(4) recognizes this by requiring plans to include an analysis of the relative supply and cost of factors of production. An analysis of competitive advantage depends on the geographic areas being compared. In general, economic conditions in Eugene will be largely shaped by national and regional economic conditions affecting the Willamette Valley.

The previous section presents trends and forecasts of conditions in Oregon and Eugene to help establish the context for economic development in Eugene. Local economic factors will help determine the amount and type of development in Eugene relative to other communities in the Willamette Valley and Oregon. This section focuses on the competitive advantages of Eugene for attracting businesses relative to the Willamette Valley and Oregon.

B.4.1 LOCATION

Eugene, the second-largest city in Oregon with a population of approximately 153,690 people in the city limits in 2007, is located in the Southern Willamette Valley. Interstate 5 runs to the east of Eugene, Highway 126 runs east-west through Eugene, and Highway 99 runs north-south through Eugene. Eugene is located generally south and west of the Willamette River. Eugene’s location will impact Eugene’s future economic development:

- Eugene shares a border with Springfield, the 9th largest city in the State of Oregon, with approximately 57,320 people in the city limits.

63 OAR 660-009-0015(4) requires assessment of the “community economic development potential.” This assessment must consider economic advantages and disadvantages—or what Goal 9 broadly considers “comparative advantages.”
in 2007. The Eugene-Springfield Metropolitan Statistical Area (MSA), which includes all of Lane County, had more than 343,000 people in 2007, accounting for 9% of Oregon’s population.

- Eugene has easy access to the State’s highway system and other transportation opportunities. In addition to the multiple freeways running by and through the City, residents and businesses can access other modes of transportation in Eugene, including the Eugene Airport, Greyhound bus service, and Amtrak passenger rail service.

- Eugene is located at the southern end of the Willamette Valley. It is the largest city on I-5 between Portland and Sacramento.

- Residents of Eugene have easy access to shopping, cultural activities, indoor and outdoor recreational activities, and other amenities in Eugene, Springfield, and rural Lane County.

- Eugene residents have several nearby opportunities for post-secondary education: the University of Oregon, Lane Community College, Northwest Christian College, and Gutenberg College.

- Businesses in Eugene have access to natural resources, such as wood products or agricultural products, from resource lands in western Oregon.

Eugene’s location, access to I-5, urban amenities, the presence of the University of Oregon, and access to natural resources are primary competitive advantages for economic development in Eugene.
B.4.2 BUYING POWER OF MARKETS

The buying power of Eugene and the Eugene-Springfield area forms part of Eugene’s competitive advantage by providing a market for goods and services. Table B-15 shows the per household expenditures for households in Eugene and Lane County in 2008. Eugene households spent nearly $49,000 per household, 2% higher than County-wide spending. Eugene households outspent County households by the greatest percentage on education, gifts, and contributions.

Table B-15. Per household expenditures, Eugene and the Lane County, 2008

<table>
<thead>
<tr>
<th>Expenditure</th>
<th>Eugene</th>
<th>Lane County</th>
<th>Eugene % of County</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transportation</td>
<td>$9,701</td>
<td>$9,592</td>
<td>101%</td>
</tr>
<tr>
<td>Shelter</td>
<td>$9,401</td>
<td>$9,196</td>
<td>102%</td>
</tr>
<tr>
<td>Food and Beverages</td>
<td>$7,529</td>
<td>$7,402</td>
<td>102%</td>
</tr>
<tr>
<td>Utilities</td>
<td>$3,469</td>
<td>$3,411</td>
<td>102%</td>
</tr>
<tr>
<td>Health Care</td>
<td>$3,033</td>
<td>$2,993</td>
<td>101%</td>
</tr>
<tr>
<td>Entertainment</td>
<td>$2,706</td>
<td>$2,655</td>
<td>102%</td>
</tr>
<tr>
<td>Apparel</td>
<td>$2,338</td>
<td>$2,284</td>
<td>102%</td>
</tr>
<tr>
<td>Household Furnishings and Equipment</td>
<td>$2,105</td>
<td>$2,058</td>
<td>102%</td>
</tr>
<tr>
<td>Contributions</td>
<td>$1,797</td>
<td>$1,725</td>
<td>104%</td>
</tr>
<tr>
<td>Household Operations</td>
<td>$1,711</td>
<td>$1,660</td>
<td>103%</td>
</tr>
<tr>
<td>Gifts</td>
<td>$1,289</td>
<td>$1,240</td>
<td>104%</td>
</tr>
<tr>
<td>Education</td>
<td>$1,175</td>
<td>$1,105</td>
<td>106%</td>
</tr>
<tr>
<td>Miscellaneous Expenses</td>
<td>$825</td>
<td>$810</td>
<td>102%</td>
</tr>
<tr>
<td>Personal Care</td>
<td>$709</td>
<td>$694</td>
<td>102%</td>
</tr>
<tr>
<td>Personal Insurance</td>
<td>$493</td>
<td>$477</td>
<td>103%</td>
</tr>
<tr>
<td>Tobacco</td>
<td>$328</td>
<td>$327</td>
<td>100%</td>
</tr>
<tr>
<td>Reading</td>
<td>$161</td>
<td>$157</td>
<td>103%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$48,770</strong></td>
<td><strong>$47,786</strong></td>
<td><strong>102%</strong></td>
</tr>
</tbody>
</table>

B.4.3 Availability of Transportation Facilities

Businesses and residents in Eugene have access to a variety of modes of transportation: automotive (Interstate 5, multiple State highways and local roads); rail (Union Pacific and Amtrak); transit (LTD); and air (Eugene Airport).

Eugene has excellent automotive access for commuting and freight movement. Eugene is located along Interstate 5, the primary north-south transportation corridor on the West Coast, linking Eugene to domestic markets in the United States and international markets via West Coast ports. West Eugene is situated along Highway 99, connecting Eugene with Junction City, Harrisburg, and rural areas to the north. Businesses and residents of Eugene also have access to Highway 126, connecting Florence to the Bend/Redmond area, and Highway 58 in Pleasant Hill.

Other transportation options in Eugene are:

- **Rail.** Union Pacific rail lines serve Eugene, providing freight service. Amtrak passenger service is also available, connecting Eugene to cities all across the west coast. The train station is located immediately northwest of downtown Eugene. Union Pacific Railroad provides freight service to Eugene businesses. The Eugene Railyard is located in northwest Eugene off the NW Expressway.

- **Transit.** The Lane Transit District (LTD) provides transit service to the Eugene-Springfield region. LTD serves Eugene with multiple bus lines, both within Eugene and connecting Eugene to Springfield and other outlying communities such as Junction City, Coburg, and Veneta. LTD’s bus rapid transit (BRT) system, called EmX, provides service between Eugene Station and Springfield Station as well as between Springfield Station and the RiverBend Hospital/Gateway Mall area. LTD is currently analyzing options for expanding EmX service to West Eugene via several routes.

- **Air.** The Eugene Airport provides both passenger and freight service for Eugene and Springfield residents. The airport is the second busiest in the state, and the fifth largest in the Pacific Northwest. The airport is served by four commercial airlines, and is the primary airport for a six county region.

Transportation is a competitive advantage that primarily affects the overall type of employment and its growth in Eugene.
B.4.4 PUBLIC FACILITIES AND SERVICES

Provision of public facilities and services can impact a firm’s decision on location within a region but ECO’s past research has shown that businesses make locational decisions primarily based on factors that are similar within a region. These factors are: the availability and cost of labor, transportation, raw materials, and capital. The availability and cost of these production factors are usually similar within a region.

Once a business has chosen to locate within a region, they consider the factors that local governments can most directly affect: tax rates, the cost and quality of public services, and regulatory policies. Economists generally agree that these factors do affect economic development, but the effects on economic development are modest. Thus, most of the strategies available to local governments have only a modest affect on the level and type of economic development in the community.

**Tax policy**

The tax policy of a jurisdiction is a consideration in economic development policy. Table B-16 shows that Eugene’s property tax rate is between $10.31 and $24.68 per $1,000 of assessed value, compared with the State average of $15.20.

<table>
<thead>
<tr>
<th>Area</th>
<th>Tax Rate (per $1,000 assessed value)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oregon</td>
<td>$15.20</td>
</tr>
<tr>
<td>Lane County</td>
<td>$15.47</td>
</tr>
<tr>
<td>Eugene</td>
<td>$10.31 - $24.68</td>
</tr>
</tbody>
</table>

Note: Eugene’s tax rates include land both outside and inside the UGB, with different tax rates depending on where land is located.

**Water**

Eugene’s water provider is the Eugene Water and Electric Board (EWEB). EWEB provides water from the McKenzie River to nearly 200,000 consumers. EWEB’s Hayden Bridge Water Filtration Plant is the largest full-treatment plant in the State. The plant added an extra 15 million gallon reservoir and a 120 million-gallon-per-day pump station in May 2003. The plant can sustain treating 72 million gallons of river water per day. EWEB maintains 35 miles of pipelines and 754 miles of mains, and
relies on 27 covered reservoirs, holding nearly 100 million gallons of water.

EWB’s Water Management Services (WMS) leads the efforts to manage water resources and the supply infrastructure to ensure an adequate supply for the City of Eugene. WMS focuses on maintaining an adequate supply and product education. WMS works to ensure that water system capital investments are timed to match growth and are not installed before necessary. WMS also coordinates product education to provide customers the information they need to efficiently manage their water use.64

The Eugene Water and Electric Board (EWB) provides drinking water to the Eugene area. EWB has water rights on the McKenzie River. EWB currently has rights for 300 cubic feet of water per second and has seen peak usage of around 100 cubic feet of water per second. EWB’s contractual water rights are projected to be sufficient for 100 years.

The Hayden Bridge Filtration Plant in east Springfield is EWB’s water treatment plant. The plant is currently undergoing an expansion that will increase the capacity to more than 80 million gallons per day. Peak summertime water demand has come close to the pre-expansion capacity of 68 million gallons per day. The Hayden Bridge expansion meets Eugene’s water needs for the next 30 years, and similar expansions are planned for 2039 and 2050.65

Additional information about the water system’s capacity to accommodate expected growth will be considered as part of Envision Eugene.

**Wastewater**

The Metropolitan Wastewater Management Commission (MWMC) manages the wastewater treatment facilities serving Eugene. The Water Pollution Control Facility in Eugene is designed to treat 50 million gallons of wastewater per day during dry weather and 200 million gallons per day during wet weather.

MWMC facilities were recently expanded to satisfy projected growth through 2025. The expanded system has a 277 million gallon peak day wet weather capacity. Additional information about wastewater capacity to

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ECONorthwest

orthwest Appendix B: Economic Opportunities Analysis

accommodate expected growth will be considered as part of Envision Eugene.

B.4.5 EU GENE’S COMPETITIVE ADVANTAGES

Economic development opportunities in Eugene will be affected by local conditions as well as the national and state economic conditions addressed above. Economic conditions in Eugene relative to these conditions in other portions of the Southern Willamette Valley form Eugene’s competitive advantage for economic development. Eugene’s competitive advantages have implications for the types of firms most likely to locate and expand in Eugene.

There is little that Eugene can do to influence national and state conditions that affect economic development. However, Eugene can influence local factors that affect economic development. Eugene’s primary competitive advantages are: location, access to transportation, quality of life, market buying power, and access to highly educated and skilled labor. These factors make Eugene attractive to residents and businesses that want a high quality of life where they live and work.

The local factors that form Eugene’s competitive advantage are summarized below.

- **Location.** Eugene is located in Lane County, west of I-5 and adjacent to Springfield. Eugene is Oregon’s second largest city, located in one of Oregon’s most populous metropolitan areas, with more than 340,000 people or about 9% of the state population. Eugene is home to the University of Oregon, the largest state university in Oregon. Businesses in the City have access to natural resources from surrounding rural areas, such as agricultural products, lumber, and other resources.

- **Transportation.** Businesses and residents in Eugene have access to a variety of modes of transportation: automotive (I-5, Highways 99 and 126, and local roads); rail (freight service from Union Pacific and passenger service with Amtrak); transit (LTD buses and bus rapid transit); and air (Eugene Airport). Businesses that need relatively easy automotive access to I-5 and other major roads in the region may be attracted to Eugene. The distance from some industrial areas, especially those in western Eugene, to I-5 may discourage some types of firms, such as warehousing and distribution, from locating in Eugene.

- **Quality of life.** Eugene’s high quality of life and urban amenities are a competitive advantage for attracting businesses
to the City. Eugene’s quality of life attributes include: access to outdoor recreation, cultural amenities (e.g., the Hult Center for the Performing Arts and other performing arts venues), shopping opportunities, quality of the school system, and availability of parks and open space. Eugene’s high quality of life is likely to attract businesses and entrepreneurs that want to locate in a high-amenity area.

- **Buying power of markets.** The buying power of Eugene’s households provides a market for goods and services. According to estimates on household spending by Oregon Prospector, households in Eugene spent nearly $49,000 per household in 2008, totaling about 45% of household expenditures in Lane County. The buying power of households in Eugene are a competitive advantage for attracting retail and services to serve the local population.

- **Labor market.** The availability of labor is critical for economic development. Availability of labor depends not only on the number of workers available, but the quality, skills, and experience of available workers as well.

  Businesses in Eugene have access to highly educated skilled workers, University of Oregon students, and unskilled workers. The University of Oregon may result in spin-off companies or attract entrepreneurs to Eugene. These businesses will need access to Eugene’s pool of skilled labor.

  Commuting is common in the Eugene-Springfield region. More than half of Eugene’s workers live outside of Eugene. The commuting patterns show that businesses in Eugene are able to attract skilled and unskilled workers from across the Eugene-Springfield region.

- **Public policy.** Public policy can impact the amount and type of economic growth in a community. The City can impact economic growth through its policies about the provision of land and redevelopment. Success at attracting or retaining firms may depend on availability of attractive sites for development and public support for redevelopment. In addition, businesses may choose to locate in Eugene (rather than in a different part of the Southern Willamette Valley) based on: City’s tax policies, development charges (i.e., systems development charges), availability of public infrastructure (i.e., transportation or sanitary sewer), and attitudes towards businesses.
B.4.6 SUMMARY OF PRODUCTION FACTORS THAT MAY AFFECT ECONOMIC DEVELOPMENT IN EUGENE

Section B-2 discussed the production factors that affect firms’ decisions of where to locate. This section summarizes the production factors that may affect economic development in Eugene.

Table B-17 provides a summary of production factors in Eugene as well as comments on local opportunities and constraints. It also discusses implications of each factor for future economic development in Eugene.
### Table B-17. Summary of production factors and their implications for Eugene

<table>
<thead>
<tr>
<th>Category</th>
<th>Opportunities</th>
<th>Challenges</th>
<th>Implications</th>
</tr>
</thead>
<tbody>
<tr>
<td>Labor</td>
<td>• Access to labor from across the Eugene-Springfield Region</td>
<td>• Commuting within the Eugene-Springfield region</td>
<td>The City has access to labor from the region. Commuting patterns may be negatively impacted by increases in energy prices. The impact is likely to be less in the immediate Eugene-Springfield area but is likely to be greater for commuters that live further from Eugene and Springfield.</td>
</tr>
<tr>
<td></td>
<td>• Highly educated labor force</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Land</td>
<td>• Opportunities for redevelopment, especially in Downtown</td>
<td>• Availability of commercial land and parcels larger than 25 acres of commercial or industrial land</td>
<td>Firms that prefer large, undeveloped parcels near highways are unlikely to locate in Eugene under current conditions, such as warehousing and distribution or manufacturers that require freight access.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Distance between I-5 and undeveloped industrial land</td>
<td></td>
</tr>
<tr>
<td>Local infrastructure</td>
<td>• Proximity to I-5 and Highways 99 and 126 and availability of freight shipping by rail</td>
<td>• Cost of providing new infrastructure</td>
<td>The cost of providing infrastructure to support employment growth will be an issue for both greenfield development and areas with redevelopment. The City Council will need to make policy decisions about how to fund infrastructure to accommodate employment growth.</td>
</tr>
<tr>
<td></td>
<td>• Opportunities for transportation via transit, bicycle, and pedestrian</td>
<td>• Cost of providing transportation infrastructure in support of the existing commuting patterns within the region</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Availability of existing infrastructure in areas for redevelopment</td>
<td></td>
<td>There is a larger, regional issue that the City will need to work with Lane County and neighboring communities to address: If Eugene continues to be the economic center of the region and workers continue to commute to Eugene from outlying cities, how will the necessary upgrades to transportation infrastructure be funded?</td>
</tr>
<tr>
<td>Access to markets</td>
<td>• Proximity to I-5 and Highways 99 and 126 and availability of freight shipping by rail</td>
<td>• Lack of sites with good transportation access, especially to I-5</td>
<td>Eugene’s highway and rail access is sufficient to attract firms that need access to markets via highways. Eugene is relatively unlikely to attract firms that need to move large quantities of freight via trucks on I-5.</td>
</tr>
<tr>
<td></td>
<td>• Availability of air transportation from the Eugene Airport for transportation of people and small quantities of goods</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Category</td>
<td>Opportunities</td>
<td>Challenges</td>
<td>Implications</td>
</tr>
<tr>
<td>---------------</td>
<td>-------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Materials</td>
<td>• Proximity to natural resources (e.g., timber or agricultural products)</td>
<td>• Cost of shipping raw and finished products</td>
<td>Eugene may be attractive to manufacturers that need access to natural resources. However, firms dependant on highway access to transport large quantities of materials may not locate in Eugene until infrastructure needs are addressed.</td>
</tr>
<tr>
<td></td>
<td>• Access to multiple rail lines</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Entrepreneurship</td>
<td>• Presence of the University of Oregon</td>
<td>• Lack of existing business clusters to support some growth industries that may appeal to entrepreneurs, such as biotech, software development, or clean energy manufacturing</td>
<td>Eugene may be attractive to entrepreneurs who value the City’s quality of life attributes, access to outdoor recreation, and other locational attributes.</td>
</tr>
<tr>
<td></td>
<td>• Quality of life</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Availability of skilled workers at a cost that is lower than the national average</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Regulation</td>
<td>• Eugene has an existing policy framework that describes the development process in the City</td>
<td>• The City may have difficulty overcoming the perception that Eugene is not business friendly.</td>
<td>The City has the opportunity to develop a regulatory framework that can promote economic activity through economic development policies, plans for providing infrastructure, and provision of a variety of housing types.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Taxes</td>
<td>• Taxes and fees can be used to fund infrastructure improvements necessary to retain and attract businesses.</td>
<td>• Comparatively high System Development Charges (SDCs)</td>
<td>Eugene needs revenue sources for providing public services and infrastructure, just as other cities do. The City has options about how to raise these funds: through property taxes, development fees, and other fees or taxes.</td>
</tr>
<tr>
<td>Industry clusters</td>
<td>• Existing business clusters in the region, such as business services, processed foods and beverages, and wood products</td>
<td>• Developing new clusters</td>
<td>Eugene can build off of existing business clusters, such as business services, to promote economic development. Elected officials have expressed a desire to develop a cluster of “green” businesses in Eugene.</td>
</tr>
<tr>
<td></td>
<td>• Availability of sites</td>
<td>• Transportation access</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Labor availability</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quality of life</td>
<td>• High quality of life, including access to recreation, proximity to cultural amenities, regional shopping opportunities and environmental quality</td>
<td>• Growth management challenges, such as balancing development with protection of environmental quality</td>
<td>Eugene’s policy choices will affect the City’s quality of life, such as decisions regarding development of natural areas, housing policies, or policies that lead to redevelopment of downtown.</td>
</tr>
<tr>
<td>Category</td>
<td>Opportunities</td>
<td>Challenges</td>
<td>Implications</td>
</tr>
<tr>
<td>----------------</td>
<td>--------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Innovative capacity | • Educated regional workforce  
|                 | • Existing professional and business service firms  
|                 | • Proximity to the University of Oregon  
|                 | • Existing businesses, clusters, and innovators in the Region                  | • Attracting and retaining good workers in the region  
|                 |                                                                                  | • Availability of higher-end housing and cultural amenities to attract creative class workers | Government can be a key part of a community’s innovative culture, through the provision of services and regulation of development and business activities that are responsive to the changing needs of business. |
B.5 EMPLOYMENT GROWTH AND TARGET INDUSTRIES IN EUGENE

Goal 9 requires cities to prepare an estimate of the amount of commercial and industrial land that will be needed over a 20-year planning period. The estimate of employment land need and site characteristics for Eugene is based on expected employment growth and the types of firms that are likely to locate in Eugene over the 20-year period. This section presents a baseline employment forecast and analysis of target industries that build from recent trends.

B.5.1 EMPLOYMENT FORECAST

Demand for commercial and industrial land will be driven by the expansion and relocation of existing businesses and new businesses locating in Eugene. The level of this business expansion activity can be measured by employment growth in Eugene. This section presents a projection of future employment levels in Eugene for the purpose of estimating demand for commercial and industrial land.

The projection of employment has three major steps:

1. **Establish base employment for the projection.** We start with the estimate of covered employment in Eugene’s UGB presented in Table B-10. Covered employment does not include all workers, so we adjust covered employment to reflect total employment in Eugene.

2. **Project total employment.** The projection of total employment will be calculated using the safe harbor method suggested in OAR 660-024.

3. **Allocate employment.** This step involves allocating employment to different building types, based on similar requirements for built space.

**Employment base for projection**

The purpose of the employment projection presented in this memorandum is to model future employment land need based on historic patterns of employment growth and development. The projects do not consider refinement of the City’s economic development objectives. Moreover, the employment projections in this appendix do not take into account a major change in employment that could result from the location (or relocation) of one or more large employers in the community during the planning period. Such a major change in the community’s employment would essentially be over and above the growth anticipated.
by the City’s employment forecast and the implied land needs (for employment, but also for housing, parks and other uses). Major economic events such as the successful recruitment of a very large employer are very difficult to include in a study of this nature. The implications, however, are relatively predictable: more demand for land (of all types) and public services.

To forecast employment growth in Eugene, we must start with a base of employment growth on which to build the forecast. Table B-11 shows ECO’s estimate of total employment in the Eugene UGB in 2006. To develop the figures, ECO started with estimated covered employment in the Eugene UGB from confidential QCEW (Quarterly Census of Employment and Wages) data provided by the Oregon Employment Department. Based on this information, Eugene had about 91,000 covered employees in 2006.

Covered employment, however, does not include all workers in an economy. Most notably, covered employment does not include sole proprietors. Analysis of data shows that covered employment reported by the Oregon Employment Department for Lane County is only about 74% of total employment reported by the U.S. Department of Commerce. We made this comparison by sector for Lane County and used the resulting ratios to convert covered employment to total employment in Eugene. Table B-18 shows Eugene had an estimated 119,549 total employees within its UGB in 2006.
Table B-18. Estimated total employment in the Eugene UGB by sector, 2006

<table>
<thead>
<tr>
<th>Sector</th>
<th>Covered Employment</th>
<th>% of Total Emp.</th>
<th>Estimated Total Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agriculture, Forestry, Fishing &amp; Hunting</td>
<td>239</td>
<td>0%</td>
<td>328</td>
</tr>
<tr>
<td>Construction</td>
<td>3,433</td>
<td>4%</td>
<td>5,311</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>10,679</td>
<td>12%</td>
<td>9,705</td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td>4,046</td>
<td>4%</td>
<td>4,755</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>12,390</td>
<td>14%</td>
<td>15,723</td>
</tr>
<tr>
<td>Transportation &amp; Warehousing &amp; Utilities</td>
<td>1,195</td>
<td>1%</td>
<td>1,716</td>
</tr>
<tr>
<td>Information</td>
<td>1,954</td>
<td>2%</td>
<td>2,465</td>
</tr>
<tr>
<td>Finance &amp; Insurance</td>
<td>2,880</td>
<td>3%</td>
<td>4,341</td>
</tr>
<tr>
<td>Real Estate &amp; Rental &amp; Leasing</td>
<td>1,651</td>
<td>2%</td>
<td>5,021</td>
</tr>
<tr>
<td>Professional, Scientific, and Technical Services</td>
<td>4,780</td>
<td>5%</td>
<td>9,185</td>
</tr>
<tr>
<td>Management of Companies and Enterprises</td>
<td>1,202</td>
<td>1%</td>
<td>1,239</td>
</tr>
<tr>
<td>Admin. &amp; Support &amp; Waste Mgt. &amp; Remediation Srv.</td>
<td>5,414</td>
<td>6%</td>
<td>7,129</td>
</tr>
<tr>
<td>Private Educational Services</td>
<td>1,203</td>
<td>1%</td>
<td>3,196</td>
</tr>
<tr>
<td>Health Care &amp; Social Assistance</td>
<td>13,120</td>
<td>14%</td>
<td>13,086</td>
</tr>
<tr>
<td>Arts, Entertainment, &amp; Recreation</td>
<td>1,357</td>
<td>1%</td>
<td>3,286</td>
</tr>
<tr>
<td>Accommodation &amp; Food Services</td>
<td>7,421</td>
<td>8%</td>
<td>8,125</td>
</tr>
<tr>
<td>Other Services (except Public Administration)</td>
<td>3,889</td>
<td>4%</td>
<td>8,033</td>
</tr>
<tr>
<td>Government</td>
<td>14,149</td>
<td>16%</td>
<td>17,297</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>91,002</td>
<td>100%</td>
<td>119,941</td>
</tr>
</tbody>
</table>

Source: 2006 covered employment from confidential Quarterly Census of Employment and Wage (QCEW) data provided by the Oregon Employment Department.

Note: Covered employment as a percent of total employment calculated by ECONorthwest using data for Lane County employment from the U.S. Department of Commerce, Bureau of Economic Analysis (total) and the Oregon Employment Department (covered).

**Employment projection**

The employment forecast covers the 2011 to 2031 period, requiring an estimate of total employment for Eugene in 2011. The estimate of Eugene’s employment base in Table B-18 (119,549 total employees) is for 2006 and does not account for changes that have occurred since December 2006. Information about the changes in employment between January 2008 to March 2010 is not readily available for Eugene. Since 2006, the following events have affected Eugene’s job market:

- Approximately 3,100 PeaceHealth employees moved from the hospital on Hilyard Street to the new hospital at RiverBend in Springfield.
- The Hynix manufacturing plan closed, laying off 1,100 employees.
- Employment in Lane County decreased by about 8,700 jobs since the start of the recession in December 2007. Some of the job losses

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66 Human Resources staff at PeaceHealth estimate that they moved 3,360 employees from the University District Hospital to RiverBend. They estimate that 3,100 of those employees were working at the University District Hospital in 2006 and 560 were hired between January 2007 and the move to RiverBend.
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were at large firms outside of Eugene. According to the Oregon Employment Department, the largest losses at firms located outside Eugene were at RV manufacturers.

In the absence of information about the affects of the recession on Eugene, we made the following assumptions to develop an employment base for the 20 year forecast:

- Eugene’s employment base decreased by about 7,183 jobs between 2006 and 2009 as a result of:
  - The move of 3,100 employees to the new hospital at RiverBend
  - Loss of about 4,083 jobs as a result of job layoffs in the current recession, including the layoff of more than 1,100 employees at Hynix. 68
- Eugene’s job market will not grow (or shrink) between May 2009 and the start of the forecast period in 2011.

Based on these assumptions, the 2011 employment base is 116,959 employees located within the Eugene UGB.

Eugene does not have an existing employment forecast. OAR 660-024-0040 (8) (a) (A) allows the City to determine employment land needs based on “The county or regional job growth rate provided in the most recent forecast published by the Oregon Employment Department.” Eugene is part of Region 5, which includes all of Lane County.

Table B-14 shows the Oregon Employment Department’s forecast for employment growth by industry for Lane County over the 2006 to 2016 period. This was the most recent forecast published at the time when this forecast was developed and discussed by City staff, City Council, and stakeholder groups. The Oregon Employment Department forecasts that employment will grow from 153,400 employees in 2006 to 176,100 employees in 2016, an increase of 22,700 employees at an average annual

67 Based on information from Oregon Employment Department’s regional economist for Lane County, Brian Rooney.

68 This estimate is based on the fact that about 60% of Lane County’s employment was located in Eugene in 2006 and the assumption that firms in Eugene accounted for about 60% of the County’s job losses, excluding losses at Monaco (2,000 employees), County Coach (400 employees), and Marathon Coach (230 employees), and Hynix (1,100 employees). Based on this assumption, Eugene lost about 2,983 jobs, plus the approximately 1,100 jobs lost at Hynix.
growth rate of 1.4%. Based on this safe harbor, employment in Eugene can be assumed to grow at 1.4% annually.

Based on these assumptions, Table B-19 shows that about 154,100 employees will be located within Eugene’s UGB by 2031, an increase of 37,177 employees or a 32% increase between 2011 and 2031.

Table B-19. Employment growth in Eugene’s UGB, 2011–2031

<table>
<thead>
<tr>
<th>Year</th>
<th>Total Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>116,959</td>
</tr>
<tr>
<td>2031</td>
<td>154,136</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Change 2011 to 2031</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employees</td>
</tr>
<tr>
<td>Percent</td>
</tr>
<tr>
<td>AAGR</td>
</tr>
</tbody>
</table>

Allocate employment to different land use types

The next step in forecasting employment is to allocate future employment to broad categories of land use. Firms wanting to expand or locate in Eugene will look for a variety of site characteristics, depending on the industry and specific circumstances. We grouped employment into four broad categories of land-use based on North American Industrial Classification System (NAICS): industrial, commercial, retail, and government.

Table B-20 shows the expected share of employment by land use type in 2011 and the forecast of employment growth by land use type in Eugene’s UGB in 2031. The distribution of employment by land use type is based on the 2006 distribution of employment. We assumed that the distribution of employment in 2011 would be the same as in 2006, with 54% of Eugene’s employment in commercial land use types, 13% in retail, 18% industrial, and 14% in government.

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69 The Oregon Employment Department’s forecast is published in “Employment Projections by industry and occupation 2006-2016 Region 5 (Lane County)” and can be found at: http://www.qualityinfo.org/pubs/projections/r5.pdf

70 We subtracted employment from PeaceHealth employees that moved to RiverBend and Hynix employees from the 2006 employment based before calculating the share of employment in Table B-20. In other words, the estimate of 54% of employment in commercial land uses does not include the 3,100 PeaceHealth employees who moved from Eugene to Springfield.
Table B-20. Baseline forecast of employment growth in by land use type, Eugene UGB, 2011–2031

<table>
<thead>
<tr>
<th>Land Use Type</th>
<th>2011 Employment</th>
<th>% of Total</th>
<th>2031 Employment</th>
<th>% of Total</th>
<th>Change 2011 to 2031</th>
</tr>
</thead>
<tbody>
<tr>
<td>Industrial</td>
<td>21,273</td>
<td>18%</td>
<td>28,034</td>
<td>18%</td>
<td>6,762</td>
</tr>
<tr>
<td>Commercial</td>
<td>63,487</td>
<td>54%</td>
<td>83,668</td>
<td>54%</td>
<td>20,180</td>
</tr>
<tr>
<td>Retail</td>
<td>15,332</td>
<td>13%</td>
<td>20,206</td>
<td>13%</td>
<td>4,874</td>
</tr>
<tr>
<td>Government</td>
<td>16,867</td>
<td>14%</td>
<td>22,228</td>
<td>14%</td>
<td>5,361</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>116,959</strong></td>
<td><strong>100%</strong></td>
<td><strong>154,136</strong></td>
<td><strong>100%</strong></td>
<td><strong>37,177</strong></td>
</tr>
</tbody>
</table>

Source: ECONorthwest
Note: Blue shading denotes an assumption by ECONorthwest

The forecast in Table B-20 assumes that Eugene will have growth in all categories of employment. It is probable that the distribution of employment by sector will change in Eugene between 2011 and 2031. We did not model potential changes in Table B-20 because the baseline forecast is designed to model future land need based on recent development patterns. The State’s forecast for Lane County (Table B-19) projects shifts in employment by sectors, most notably a 1% decrease in the share of manufacturing employment and a 1.6% increase in the share of health care employment. These changes are not modeled in Table B-20 because recent changes in the national and regional economy make it very difficult to model shifts in Eugene’s economy, especially in the absence of an economic development strategy.
B.5.2 POTENTIAL GROWTH INDUSTRIES

An analysis of growth industries in Eugene should address two main questions: (1) Which industries are most likely to be attracted to the Eugene-Springfield area? and (2) Which industries best meet Eugene’s economic objectives? In the absence of a formal economic development strategy, we assume that the types of industries that Eugene wants to attract have the following attributes: high-wage, stable jobs with benefits; jobs requiring skilled and unskilled labor; employers in a range of industries that will contribute to a diverse economy; and industries that are compatible with Eugene’s community values.

Key trends affecting employment growth

Previous sections reviewed historical growth trends by industry in the Eugene-Springfield Region and Lane County since 1980 and employment in Eugene. A review of key historical trends in employment in the Eugene-Springfield Region can help identify potential growth industries in Eugene. In other words, economic opportunities in Eugene are a function of regional historical trends and future economic shifts.

While nearly all sectors of the economy in the Region experienced growth over this period, some sectors grew faster than others, resulting in a shift in the distribution of employment by sector. Key historical trends included in the 1980 to 2007 period include:

- A substantial increase in the share of employment in Services, which increased from 23% to 42% of covered employment in Lane County.
- A decrease in the share of employment in Retail Trade, from 21% to 13%. The number of jobs in retail did not decrease substantially over the 27-year period (a loss of nearly 550 retail jobs) but growth in retail jobs lagged behind growth in other sectors, especially service sectors.
- A decline in the share of employment in Manufacturing, which fell from 20% to 13% of covered employment.
- A decline in the share of employment in Government, which decreased from 20% to 16% of covered employment.

Together, these sectors represent about 84% of employment in the County. Other sectors of the County’s economy have a relatively stable and small share of the County’s employment.
Target industries

The characteristics of Eugene will affect the types of businesses most likely to locate in Eugene. Eugene’s attributes that may attract firms are: the City’s proximity to I-5, high quality of life, presence of the University of Oregon, access to an educated workforce, availability of skilled and semi-skilled labor, and proximity to indoor and outdoor recreational opportunities. The industries described below could change if policy makers develop an economic development strategy that includes aspirations to attract particular target industries. The types of businesses that may be attractive to Eugene include:

- **Green businesses.** There is no clear definition of what constitutes a green industry or business. In general, green businesses are those that produce products or services that improve or maintain environmental quality, as described previously in this appendix. Opportunities for environmentally conscious businesses are growing. The positive attitude about green businesses from residents of Eugene and the City government may make Eugene more attractive to green businesses. The types of green businesses that may choose to locate or expand in Eugene includes: firms engaged in sustainable product research and development, green construction firms (e.g., firms that use LEED-certified building practices), organic food processing, sustainable logging and/or lumber products manufacturing, or alternative energy production (e.g., manufacturing solar panels or bio-fuels).

Centron Solar, a group of 30 Chinese companies in the solar panel industry, announced their decision to locate their U.S. headquarters in Eugene in July 2009. Attracting more firms in this field and other similar industries would contribute to Eugene’s image as a “green-friendly” city.

- **High-Tech.** Eugene’s access to highly educated labor, access to comparatively inexpensive electricity, and high quality of life may make Eugene attractive to high-tech firms. The types of firms that may be attracted to Eugene range from high-tech manufacturing to data centers to software development.

- **Professional and Technical Services.** Eugene’s attributes make it attractive to businesses that need access to educated workers and want a high quality of life. These types of businesses could include engineering, research, and other professional services that are attracted to high-quality settings.

- **Manufacturing.** Eugene’s attributes may attract manufacturing firms. The type of manufacturing and size of firm may depend on
land availability and the community’s preferences for clean industries. Large manufacturers may require large, flat sites, while small-scale manufactures (e.g., firms with fewer than 50 employers) may have greater flexibility in where to locate. Examples of manufacturing include solar and other clean energy products, furniture manufacturing, specialty apparel, metal fabrication, high-tech electronics, avionics equipment, recreational equipment, or other specialty manufacturing.

- **Specialty Food Processing.** Eugene’s proximity to agricultural resources and community values may make the City attractive to specialty food processing firms, such as those that specialize in organic or natural foods or wineries.

- **Call Centers.** The existing call center cluster may attract call centers to Eugene. The potential for growth in call centers in the Eugene-Springfield area will be dependent of the availability of skilled labor.

- **Back-Office Functions.** Eugene’s high quality of life, availability of skilled labor, and relatively low wages may attract back-office functions, such as the Levi Strauss financial center. Back-office functions include administrative functions, such as accounting or information technology. The potential for growth in back-office functions may be limited by national competition for this type of employment. Eugene may be more successful at attracting back-office functions for firms that have a reason to locate in the region, such as firms with corporate headquarters on the West Coast or firms that do a substantial amount of business in the Willamette Valley.

- **Corporate or Regional Headquarters.** Eugene’s quality of life, location along I-5, and availability of educated workers may make Eugene attractive as a place to locate corporate or regional headquarters.

- **Tourism.** Visitors may be attracted to Eugene to take advantage of recreational opportunities and other amenities. They may also be attracted as a result of regional events, such as the Olympic Track and Field trials, the Oregon Country Fair, or the University of Oregon Bach Festival. Industries that serve tourists, such as food services and accommodations, are likely to grow if tourism increases.

- **Services for seniors.** Eugene’s growing population of retirees or near retirees, may attract or create demand for health services that
provide services to older people, such as assisted living facilities, retirement centers, or medical services.

- **Services for Residents.** Population growth will drive development of retail, medical services, and government services, especially education, in Eugene.

- **Government and Public Services.** Eugene will continue to be the location for institutions such as: Eugene City Services, Federal offices and the Federal Courthouse, State services such as the State Office Building or the Department of Motor Vehicles, the County offices and services (e.g., the Lane County Courts and the Lane County Department of Health), 4J and Bethel School Districts, and the Eugene Water and Electric Board (EWEB).
B.6 LAND DEMAND AND SITE NEEDS

OAR 660-009-0015(2) requires the EOA identify the number of sites, by type, reasonably expected to be needed for the 20-year planning period. Types of needed sites are based on the site characteristics typical of expected uses. The Goal 9 rule provides flexibility in how jurisdictions conduct and organize this analysis. For example, site types can be described by plan designation (i.e., heavy or light industrial), they can be by general size categories that are defined locally (i.e., small, medium, or large sites), or it can be industry or use-based (i.e., manufacturing sites or distribution sites).

This section provides a baseline estimate of employment land needs based on assumptions about the amount of employment growth that will require new land, employment densities, and land need by site size. This section provides a demand-based approach to estimating employment land needs, which projects employment land need based predominantly on the forecast of employment growth, using recent employment densities (e.g., the number of employees per acre) to estimate future commercial and industrial land demand.

Goal 9 requires cities to state objectives for economic development (OAR 660-009-0020(1)(a)) and to identify the characteristics of sites needed to accommodate industrial and other employment uses to implement the economic development objectives (OAR 660-009-0025(1)). The City of Eugene has no stated objectives for economic development, making it impossible to identify the characteristics of sites needed to implement the economic development objectives. When Eugene decisionmakers develop this statement of economic development objectives, the analysis of commercial and industrial land demand may change, possibly substantially, to implement the economic development objectives.

B.6.1 EMPLOYMENT LAND NEEDS

This section presents a preliminary estimate of Eugene’s future employment land need by type of land use. Eugene’s employment land need is based on the employment forecast (presented in Table B-19). The employment forecast was converted to an estimate of employment land need based on the following steps:

1. Determine the amount of employment to allocate to non-employment plan designations.
2. Determine existing employment densities
3. Convert from employment growth to land need based on employment densities

The remainder of this section is organized based on these steps.

**Employment locating in non-employment plan designations**

Not all new employment will require additional land in employment plan designations. Some employment growth will occur on land not designated for employment use (e.g., employment in residential zones) and some employment growth will not require new commercial or industrial built space or land (e.g., new employment accommodated in existing built space). Table B-21 shows the baseline estimate of employment growth by the employment location. Table B-21 makes three assumptions that decrease land needed for new employment:

- **Some employment growth will occur on land not designated for employment use.** Some new employment will occur outside commercial and industrial built space or land. For example, some construction contractors may work out of their homes, with no need for a shop or office space on non-residential land. In 2006, 15% of employment is located in residential plan designations.\(^71\) This includes businesses located in non-employment plan designations (such as a corner store in a neighborhood) and people working from home. This estimate excludes workers that are not covered by unemployment insurance, such as sole proprietors. Although these workers may be more likely than covered employees to locate on land with non-employment designation, we do not have information about where non-covered workers are located. In the absence of this information, Table B-21 assumes that covered and non-covered workers will locate on land in non-employment plan designations in the same proportions and that **15% of all employment will locate on land in non-employment plan designations.**

- **Some employment growth will not require new commercial or industrial built space or land.** As firms add employees they may fit many of them into existing office spaces. That would occur if current vacancy rates were much higher than average

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\(^71\) Residential plan designations include: High Density Residential, Medium Density Residential, Low Density Residential, High Density Residential Mixed Use, and Medium Density Residential Mixed Use.
(because future employment growth could then be partially accommodated in existing space until natural, frictional vacancy rate was reached). It could also occur in occupied buildings through filling vacant cubicles or offices or increasing the density of use existing workspaces (e.g., by adding new cubicles). There is no study that quantifies how much employment is commonly accommodated in existing built space over a 20-year period in a city.

There is no data that document the amount of employment located in existing built space. Clearly some employment is accommodated through this type of intensification of use but, equally clearly, not all employment can be accommodated this way. ECO typically assumes that 5% to 10% of employment will be accommodated in existing built space. Such an assumption cannot apply indefinitely, so it presumes that (1) the use of existing space is not so intense that it cannot be economically increased, and (2) economic conditions, competitiveness, and standard business practices for reducing cost make a 5% to 10% increase in space utilization reasonable.

Table B-21 assumes that 10% of new employment will locate in existing space. The reason for assuming 10%, rather than 5% or 7% of new employment, is that current commercial vacancy rates in the Pacific Northwest are higher than historical norms. This suggests that commercial vacancy rates are higher in Eugene than historical norms.72

- Some employment will occur on land that is currently developed, through redevelopment. Goal 9 strongly encourages cities to develop policies to encourage redevelopment of commercial and industrial land, especially brownfields. Redevelopment is any development that happens on land that has been classified as developed (i.e., not vacant). This definition is consistent with the definition of developed land in OAR 660-009.

For the purposes of this study, we define redevelopment as development that (1) occurs on land with existing development, and (2) results in a net increase in employment density. The second condition means that the replacement of a building used for employment by a new building with similar employment

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72 Based on MarketView reports for Portland and Seattle for First Quarter 2009 from CB Richard Ellis. Accessed from: http://www.cbre.com/USA/Research/
density would not be counted as redevelopment. This definition includes infill land with existing development but capacity for additional development.

Determining how much redevelopment has actually occurred is difficult because data about redevelopment (or indicators of redevelopment) are not maintained. While the City collects data for industrial and commercial building permits, there is no way to determine which of these permits was issued for redevelopment of a site, short of sorting through the permits one-by-one. One approach to estimating redevelopment is through analyzing the characteristics of underutilized lands. This analysis could include: analysis of land to improvement value, employment density, and lot coverage. The results of this analysis would provide information about redevelopment potential for underutilized employment land but it would not definitively indicate what land will redevelop over the planning period.

As a result, there is no factual basis to estimate the amount of employment growth that may be accommodated through redevelopment. In previous studies conducted by ECONorthwest and other organizations, redevelopment has been addressed by assuming that a certain percentage of employment growth will be addressed through redevelopment, generally from 5% to 20% of new residential development.

Table B-21 assumes that the following amounts of employment growth will be accommodated through redevelopment: 10% of industrial employment, 15% of commercial employment, and 35% of retail employment. The rationale for using different redevelopment rates is that different types of employment land redevelop at different rates. For example, retail uses are more likely to redevelop (e.g., redevelopment along Coburg Road) than heavy manufacturing industrial sites.

These assumptions may be revised based on discussions with Eugene’s decisionmakers about Eugene’s economic development policies.
Table B-21. Baseline estimate of new employment that will not require new employment land, Eugene, 2031

<table>
<thead>
<tr>
<th>Land Use Type</th>
<th>New Employment Growth</th>
<th>Non-employment designations</th>
<th>Existing Com. &amp; Ind. Built Space</th>
<th>Redevelopment</th>
<th>Total</th>
<th>% of New Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Industrial</td>
<td>6,762</td>
<td>-</td>
<td>676</td>
<td>676</td>
<td>1,352</td>
<td>20%</td>
</tr>
<tr>
<td>Commercial</td>
<td>20,180</td>
<td>3,027</td>
<td>2,018</td>
<td>3,027</td>
<td>8,072</td>
<td>40%</td>
</tr>
<tr>
<td>Retail</td>
<td>4,874</td>
<td>731</td>
<td>487</td>
<td>1,706</td>
<td>2,924</td>
<td>60%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>31,816</strong></td>
<td><strong>3,758</strong></td>
<td><strong>3,181</strong></td>
<td><strong>5,409</strong></td>
<td><strong>12,348</strong></td>
<td><strong>39%</strong></td>
</tr>
</tbody>
</table>

Source: ECONorthwest
Note: Land need for government uses is accounted for the analysis of public and semi-public land needs

Table B-22 shows that, using these assumptions, Eugene will need to provide land for approximately 19,467 new employees between 2011 and 2031.

Table B-22. Baseline estimate of new employment locating in employment plan designations, Eugene, 2031

<table>
<thead>
<tr>
<th>Land Use Type</th>
<th>New Employment</th>
<th>Employment Growth not Requiring New Employment Land</th>
<th>Employment Requiring New Land</th>
</tr>
</thead>
<tbody>
<tr>
<td>Industrial</td>
<td>6,762</td>
<td>1,352</td>
<td>5,410</td>
</tr>
<tr>
<td>Commercial</td>
<td>20,180</td>
<td>8,072</td>
<td>12,108</td>
</tr>
<tr>
<td>Retail</td>
<td>4,874</td>
<td>2,924</td>
<td>1,950</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>31,816</strong></td>
<td><strong>12,348</strong></td>
<td><strong>19,468</strong></td>
</tr>
</tbody>
</table>

Source: ECONorthwest
Note: Land need for government uses is accounted for the analysis of public and semi-public land needs

Table B-22 does not include employment for government land uses. This appendix does not address land needed for government employment. Land for government uses is forecast using a different methodology, in the Appendix on Public and Semi-Public Land Needs.
Existing employment density

The next step in forecasting employment land needs is to convert employment to land based on assumptions about employment density, which requires assumptions about employment density. Employment density is the ratio of labor to land. There are several ways to measure employment density:

- **Employees per acre** (EPA) is the total number of employees divided by the size of the site.
- **Floor area ratio** (FAR) is the total build square footage divided the site size square footage.
- **Square feet per employee** is the total square feet required for employees, including shared spaces (e.g. lobbies, hallways, elevators, restrooms, and other shared built space).

We used EPA as the measure of employment density because data about the number of employees per acre was relatively easily available. The City does not have data generally available about building foot print, which is required for a FAR, or about square feet of workspace space per employee.

Table B-23 shows EPA estimates by plan designation for employment in Eugene in 2006 based on employment density in selected sample areas. Determining employment density for all employment within Eugene would be a time-consuming task. We selected 22 areas within Eugene’s UGB to estimate employment. The sample areas represented a range of employment types, from dense development in downtown to less dense industrial areas, and include a little more than half of the employment in Eugene. The sample areas used to estimate employment by plan designation are shown in Map B-1.

Table B-23 shows that Eugene’s average employment density was 24 employees per acre in commercial and industrial plan designations. Density in commercial designations ranged from 36 EPA in the Commercial designation to 54 EPA in Major Retail Center designation. The average employment density in commercial designations was 39 EPA, with nearly three-quarters of employment in the Commercial Designations, which has an average density of 36 EPA. Industrial designations averaged 13 EPA, ranging from 8 EPA in the Heavy Industrial and Special Heavy Industrial designations to 21 EPA in the Campus Industrial designation.
Table B-23. Estimate of employees per acre (EPA) by plan designation in selected sample areas, Eugene, 2006

<table>
<thead>
<tr>
<th>Plan Designation</th>
<th>Employees</th>
<th>Acres (net)</th>
<th>Employees per Net Acre</th>
</tr>
</thead>
<tbody>
<tr>
<td>Commercial</td>
<td>46,369</td>
<td>1,181</td>
<td>39</td>
</tr>
<tr>
<td>Commercial</td>
<td>33,942</td>
<td>936</td>
<td>36</td>
</tr>
<tr>
<td>Major Retail Center</td>
<td>9,642</td>
<td>179</td>
<td>54</td>
</tr>
<tr>
<td>Mixed Use</td>
<td>1,642</td>
<td>37</td>
<td>45</td>
</tr>
<tr>
<td>Commercial Mixed Use</td>
<td>1,143</td>
<td>29</td>
<td>40</td>
</tr>
<tr>
<td>Industrial</td>
<td>21,904</td>
<td>1,716</td>
<td>13</td>
</tr>
<tr>
<td>Light Medium Industrial</td>
<td>11,502</td>
<td>730</td>
<td>16</td>
</tr>
<tr>
<td>Heavy Industrial &amp; Special Heavy Industrial</td>
<td>6,524</td>
<td>799</td>
<td>8</td>
</tr>
<tr>
<td>Campus Industrial</td>
<td>3,878</td>
<td>188</td>
<td>21</td>
</tr>
</tbody>
</table>

| EPA for Commercial and Industrial Plan Designations | 68,273 | 2,897 | 24 |

Source: ECONorthwest

The summary of employment density in Table B-23 does not tell the full story about employment density in Eugene. Employment density of land used for commercial office and retail purposes varies substantially throughout Eugene, depending on the location and type of use. Table B-24 shows EPA for several commercial office and retail sites in Eugene (shown on Map B-1).

Employment density in retail sites varies from 14 EPA at the retail area along West 11th at Seneca Road (the Fred Meyer’s shopping center) to 22 EPA at Valley River Center and Santa Clara Square. Oakway Center’s employment density is higher than most other retail sites in Eugene, at 37 EPA. Sites with a mixture of retail and office sites typically have higher employment densities, around 30 to 35 EPA.

Office employment densities are generally higher than retail employment densities, ranging from 30 EPA to higher. Table B-24 shows office employment densities for established sites in and near Eugene’s downtown and along Country Club Road, where densities range from about 53 to 93 EPA. Office buildings in these areas are typically four stories or higher. Areas with two story office buildings are more likely to have employment densities closer to 30 to 40 EPA.

Other office-type employment sites that are not shown in Table B-24 (to protect confidential employment data) include the University of Oregon, which has nearly 40 EPA, and the University District Hospital, which had more than 300 EPA before staff were moved to RiverBend Hospital.
Table B-24. Estimate of employees per acre (EPA) for sample sites, Eugene, 2006

<table>
<thead>
<tr>
<th>Employees per Acre (EPA)</th>
<th>Retail Sites</th>
<th>Mixed Retail and Office Sites</th>
<th>Office</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>South of Downtown</td>
</tr>
<tr>
<td></td>
<td>Retail Sites</td>
<td>Mixed Retail and Office Sites</td>
<td></td>
</tr>
<tr>
<td></td>
<td>14</td>
<td>30</td>
<td>53</td>
</tr>
<tr>
<td>West 11th and Seneca Rd</td>
<td>West 11th and Beltway</td>
<td>18th Ave. and Chambers</td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>North Delta Hwy and Green Acres Rd</td>
<td>Willamette Street between 24th and 29th Ave.</td>
<td></td>
</tr>
<tr>
<td>20</td>
<td>Barger Drive near Beltline</td>
<td></td>
<td></td>
</tr>
<tr>
<td>21</td>
<td>Santa Clara Square</td>
<td></td>
<td></td>
</tr>
<tr>
<td>22</td>
<td>Valley River Center</td>
<td></td>
<td></td>
</tr>
<tr>
<td>22</td>
<td>Oakway Center</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Source: ECONorthwest</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Baseline estimate of employment land need

The next step in determining employment land needs for the 20 year period is to estimate the baseline employment land need based on employment density. Table B-25 shows a preliminary estimate of employment land need by land use type based on existing employment densities. Table B-25 shows that Eugene will need about 818 acres of land for employment uses between 2011 and 2031. Table B-25 uses the following assumptions to convert employment into land need:

- **Eugene’s future employment density will be similar to current employment densities.** An EPA is the ratio of the number of employees per acre of employment land (land with a commercial or industrial Plan Designation) that is developed for employment uses. Table B-25 uses EPA assumptions based on 2006 employment data from Table B-23. The EPA assumption for commercial is based on commercial centers, such as Downtown, the area south of Downtown, Country Club Road, or mixed retail and office sites. The EPA assumption for retail is based on the observed EPA in retail centers, such as Valley River Center, Oakway Center, or West 11th and Seneca.

- **Employment sites will require additional land for right-of-way and other public uses.** The EPA assumptions are employees per net acre (e.g., acres that are in tax lots). As land gets divided and developed, some of the land goes for right-of-way and other public uses. One way to estimate the amount of land needed for employment including public right-of-way is to convert from net to gross acres based on assumptions about the amount of land needed for right-of-way. A net to gross conversion is expressed as a percentage of gross acres that are in public right-of-way.

The amount of land used for rights-of-way varies based on use. Industrial sites in Eugene had a net to gross factor averaging about 14%, with no substantial different between light and heavy industry. Commercial and retail sites in Eugene had a net to gross factor ranging from: about 17% in community retail centers, 31% in Downtown, and 34% in the area directly south of Downtown Eugene. Based on this information, a reasonable net to gross factor

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73 OAR 660-024-0010(6) uses the following definition of net buildable acre. “Net Buildable Acre” consists of 43,560 square feet of residentially designated buildable land after excluding future rights-of-way for streets and roads. While the administrative rule does not include a definition of a gross buildable acre, using the definition above, a gross buildable acre will include areas used for rights-of-way for streets and roads. Areas used for rights-of-way are considered unbuildable.
The assumption for industrial development is 15% and 20% for commercial and retail development.

### Table B-25. Baseline estimate of employment land need by land use type, Eugene, 2031

<table>
<thead>
<tr>
<th>Land Use Type</th>
<th>Employment on New Land (Net Acres)</th>
<th>EPA Land Demand (Net Acres)</th>
<th>Land Demand (Gross Acres)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Industrial</td>
<td>5,410</td>
<td>13</td>
<td>416</td>
</tr>
<tr>
<td>Commercial</td>
<td>12,108</td>
<td>68</td>
<td>178</td>
</tr>
<tr>
<td>Retail</td>
<td>1,950</td>
<td>23</td>
<td>85</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>19,468</strong></td>
<td><strong>29</strong></td>
<td><strong>679</strong></td>
</tr>
</tbody>
</table>

Source: ECONorthwest

Note: Gross acres calculated using a net-to-gross factor of 15% for industrial and 20% for commercial and retail. For example, industrial gross acres was calculated using the following formula: \(416/(1-.15) = 490\).
B.6.2 LONG-TERM SITE NEEDS

The analysis of long-term site needs in Eugene builds off of the forecast of employees requiring new land (Table B-22) and the land needs estimate (Table B-25) for Eugene. Consistent with the requirements of OAR 660-009-0015(2), the baseline site needs analysis presented in this section identifies the number of sites by broad category of site type and size reasonably expected to be needed for the 20-year planning period.

Determining Eugene’s long-term site needs requires making assumptions about the site needs of businesses that may expand or locate in Eugene. Table B-26 provides information about existing sites in Eugene, based on the results of the Buildable Lands Inventory (BLI) for all land in industrial and commercial and retail plan designations in Eugene in 2008. Table B-26 shows: acres of land, number of sites, distribution of sites by site size, and average site sizes in acres.

Table B-26 shows that the majority of land in Industrial and Commercial Plan Designations is in sites smaller than one acre. The average site size for Industrial land is about 2.2 acres and 0.7 acres for Commercial sites.

### Table B-26. Characteristics of developed land in industrial and commercial plan designations, Eugene, 2008

<table>
<thead>
<tr>
<th>Land Use Type by Broad Plan Designation Categories</th>
<th>Site size (acres)</th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Acres of land</td>
<td>Less than 1</td>
<td>1 - 2.5</td>
<td>2.5 - 5</td>
<td>5 - 10</td>
<td>10 - 25</td>
<td>25 - 50</td>
<td>50 - 100</td>
<td>More than 100</td>
<td>Total</td>
<td></td>
</tr>
<tr>
<td>Industrial</td>
<td>571</td>
<td>792</td>
<td>742</td>
<td>1,092</td>
<td>1,017</td>
<td>771</td>
<td>361</td>
<td>413</td>
<td>5,759</td>
<td></td>
</tr>
<tr>
<td>Commercial</td>
<td>767</td>
<td>415</td>
<td>333</td>
<td>285</td>
<td>487</td>
<td>194</td>
<td>-</td>
<td>-</td>
<td>2,481</td>
<td></td>
</tr>
<tr>
<td><strong>Total Acres</strong></td>
<td><strong>1,338</strong></td>
<td><strong>1,207</strong></td>
<td><strong>1,075</strong></td>
<td><strong>1,377</strong></td>
<td><strong>1,504</strong></td>
<td><strong>965</strong></td>
<td><strong>361</strong></td>
<td><strong>413</strong></td>
<td><strong>8,240</strong></td>
<td></td>
</tr>
<tr>
<td>Number of sites</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Industrial</td>
<td>1,712</td>
<td>495</td>
<td>207</td>
<td>156</td>
<td>67</td>
<td>22</td>
<td>6</td>
<td>2</td>
<td>2,667</td>
<td></td>
</tr>
<tr>
<td>Commercial</td>
<td>3,087</td>
<td>262</td>
<td>100</td>
<td>38</td>
<td>34</td>
<td>6</td>
<td>-</td>
<td>-</td>
<td>3,527</td>
<td></td>
</tr>
<tr>
<td><strong>Total Number of Sites</strong></td>
<td><strong>4,799</strong></td>
<td><strong>757</strong></td>
<td><strong>307</strong></td>
<td><strong>194</strong></td>
<td><strong>101</strong></td>
<td><strong>28</strong></td>
<td><strong>6</strong></td>
<td><strong>2</strong></td>
<td><strong>6,194</strong></td>
<td></td>
</tr>
<tr>
<td>Percent of Acres</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Industrial</td>
<td>10%</td>
<td>14%</td>
<td>13%</td>
<td>19%</td>
<td>18%</td>
<td>13%</td>
<td>6%</td>
<td>7%</td>
<td>100%</td>
<td></td>
</tr>
<tr>
<td>Commercial</td>
<td>31%</td>
<td>17%</td>
<td>13%</td>
<td>11%</td>
<td>20%</td>
<td>8%</td>
<td>0%</td>
<td>0%</td>
<td>100%</td>
<td></td>
</tr>
<tr>
<td>Average Sites size (acres)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Industrial</td>
<td>0.3</td>
<td>1.6</td>
<td>3.6</td>
<td>7</td>
<td>15.2</td>
<td>35</td>
<td>60.2</td>
<td>206.5</td>
<td>2.2</td>
<td></td>
</tr>
<tr>
<td>Commercial</td>
<td>0.2</td>
<td>1.6</td>
<td>3.3</td>
<td>7.5</td>
<td>14.3</td>
<td>32.3</td>
<td>--</td>
<td>--</td>
<td>0.7</td>
<td></td>
</tr>
</tbody>
</table>

Source: Buildable Lands Inventory, 2009, Lane Council of Governments, analysis by ECONorthwest

Table B-27 presents a baseline estimate of employment land site needs, assuming that future site needs will have similar characteristics of existing sites. For example, Table B-26 shows that 10% of industrial sites are smaller than 1 acre. Table B-25 shows a gross industrial land need for 490 acres. Table B-27 shows that 10% of the 490 gross acres of industrial land will result in 49 acres of industrial land on sites one acre of smaller. Table B-26 shows that the average size for industrial sites smaller than one acre...
is 0.3 acres. Table B-27 assumes an average site size of 0.3 acres, resulting in demand for 164 industrial sites smaller than one acre.

Table B-27 shows:

- Eugene will need about 151 gross acres of employment land on 674 sites smaller than one acre.
- Eugene will need about 122 gross acres of employment land on 77 sites between one and two and a half acres in size.
- Eugene will need about 107 gross acres of employment land on 32 sites between two and a half and five acres in size.
- Eugene will need about 131 gross acres of employment land on 20 sites between five and ten acres in size.
- Eugene will need about 150 gross acres of employment land on 11 sites between ten and twenty-five acres in size.
- Eugene will need about 92 gross acres of employment land on 3 sites between twenty-five and fifty acres in size.
- Eugene will need about 66 gross acres of employment land on 1 sites between fifty and one-hundred acres in size.

Table B-27 makes the following assumptions:

- **Future distribution of employment land by site size will be similar to the current distribution of land by site size.** Table B-26 shows that more than one-third of employment is located on sites smaller than five acres and more than one-quarter of employment land is located in sites larger than 25 acres. The analysis in Table B-27 assumes that the current distribution of

<table>
<thead>
<tr>
<th>Land and Site Needs by Land Use Type</th>
<th>Less than 1</th>
<th>1 - 2.5</th>
<th>2.5 - 5</th>
<th>5 - 10</th>
<th>10 - 25</th>
<th>25 - 50</th>
<th>50 - 100</th>
<th>More than 100</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Industrial</td>
<td>49</td>
<td>67</td>
<td>63</td>
<td>93</td>
<td>86</td>
<td>66</td>
<td>66</td>
<td>-</td>
<td>490</td>
</tr>
<tr>
<td>Commercial (including Retail)</td>
<td>102</td>
<td>55</td>
<td>44</td>
<td>38</td>
<td>64</td>
<td>26</td>
<td>-</td>
<td>-</td>
<td>329</td>
</tr>
<tr>
<td><strong>Total Acres</strong></td>
<td><strong>151</strong></td>
<td><strong>122</strong></td>
<td><strong>107</strong></td>
<td><strong>131</strong></td>
<td><strong>150</strong></td>
<td><strong>92</strong></td>
<td><strong>66</strong></td>
<td><strong>-</strong></td>
<td><strong>819</strong></td>
</tr>
<tr>
<td>Number of Sites</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Industrial</td>
<td>164</td>
<td>42</td>
<td>18</td>
<td>14</td>
<td>6</td>
<td>2</td>
<td>1</td>
<td>-</td>
<td>247</td>
</tr>
<tr>
<td>Commercial (including Retail)</td>
<td>510</td>
<td>35</td>
<td>14</td>
<td>6</td>
<td>5</td>
<td>1</td>
<td>-</td>
<td>-</td>
<td>571</td>
</tr>
<tr>
<td><strong>Total Sites</strong></td>
<td><strong>674</strong></td>
<td><strong>77</strong></td>
<td><strong>32</strong></td>
<td><strong>20</strong></td>
<td><strong>11</strong></td>
<td><strong>3</strong></td>
<td><strong>1</strong></td>
<td><strong>-</strong></td>
<td><strong>818</strong></td>
</tr>
</tbody>
</table>

Source: ECONorthwest

Note: Table B-27 shows demand for one industrial site of 66 acres. The analysis in Table B-27 showed some demand for industrial sites larger than 50 acres based on the recent development patterns on industrial land. But the analysis showed demand for fractions of these larger sites (because these sites account for a small percentage of the industrial land base). ECO added the demand for these sites together to total 66 acres and assigned that demand for the appropriate site size, 50 to 100 acres.
employment land by site size will continue into the future. For example, Table B-27 shows that about one-third of needed industrial land will be on sites smaller than 5 acres (179 acres of the 490 acres of industrial land demand), consistent with the current distribution of employment land by site size.

• **The average size of sites will be similar to the current average site size.** Goal 9 requires that an estimate of the number of sites needed by land use type and site size. The analysis in Table B-27 assumes that the average size of sites will remain the same throughout the planning period, as shown in Table B-26. For example, the average size of industrial sites between 5 to 10 acres in size is 7 acres. Table B-27 reflects the assumption that this average will remain consistent over the planning period.

The analysis of site needs in Table B-27 does not include need for sites over 100 acres. Table B-26 shows that Eugene has two sites larger than one hundred acres, accounting for about 413 acres (7%) of Eugene’s developed industrial land. **The purpose of the baseline analysis in Table B-27 is to estimate Eugene’s site needs based on existing policy and existing land-use patterns.**

Until the City of Eugene articulates its economic development objectives and discusses its preferred target industries, it is not possible to fully evaluate the characteristics of needed sites. For example, Eugene may need more sites 25 acres and larger to provide sites for desired target industries and to pursue the City’s economic development goals over the planning. This analysis, however, does not take into account need for these larger sites, nor the characteristics of those sites. The need for larger sites can be determined based on the City’s economic development policies and the characteristics of the target industries the City wants to attract. Eugene’s policy makers have not developed an economic development strategy, as required by OAR 660-009, which would provide the basis for assuming need for larger employment sites. In order to meet the requirements of Goal 9, Eugene’s policymakers will need to develop an economic development strategy prior to finalizing the need for employment land for the 2011 to 2031 period. These discussions are expected to take place as part of the Envision Eugene project.

Table B-28 shows a comparison of demand for commercial and industrial land for employment uses. Table B-28 shows the baseline estimate of employment land sufficiency and summarizes the three parts of determining employment land sufficiency:
• **Employment land demand.** The demand for employment land is based on the employment forecast presented in Table B-27. Table B-28 shows that Eugene will need a total of 490 gross acres of land for industrial uses and 329 gross acres of land for commercial and retail uses.

• **Employment land supply.** The supply of employment land shown in Table B-28 is based on the buildable land inventory of vacant developable by site size, shown in detail in Appendix A. For example, the BLI shows that Eugene has a total of 924 acres of industrial land, as does Table B-28.

• **Employment land sufficiency.** Table B-28 shows whether Eugene has a surplus or deficit of employment land by site size by comparing the demand for land with the supply of land. For example, Table B-28 shows that Eugene has a deficit of 118 commercial acres smaller than 5 acres. This result was arrived at by subtracting the demand for commercial land on sites smaller than 5 acres (201 acres) from the supply of commercial land on sites smaller than 5 acres (83 acres). The sufficiency of sites was arrived at by the same method (i.e., demand for 559 commercial sites smaller than 5 acres minus the supply of 198 commercial sites smaller than 5 acres equals a deficit of 361 sites).

Table B-28 shows that Eugene has a deficit of commercial and retail sites in all sizes smaller than 50 acres, for a total deficit of 230 gross acres on 371 sites. Eugene has about 434 acres of industrial land, on 39 sites, in excess of the demand for industrial land. The industrial land supply includes one 195 acre site owned by the Metropolitan Wastewater Management Commission (MWMC). This site is located along Highway 99 at the edge of Eugene’s UGB, is currently used for wastewater reclamation, and about 75% of the site is in wetlands. The potential employment uses on this site are limited to uses that are compatible with these limitations. MWMC is currently in negotiations with a potential lessee which could result in a change in use at this site, potentially impacting the status of this site in the BLI.
Table B-28. Baseline estimate of employment land demand, employment land supply, and employment land sufficiency, Eugene UGB, 2011 to 2031

<table>
<thead>
<tr>
<th>Land Use Type by Broad Plan Designation Categories</th>
<th>Site size (gross acres)</th>
<th>Total (gross acres)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Less than 5</td>
<td>5 to 10</td>
</tr>
<tr>
<td><strong>Land Demand</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Land (gross acres)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Industrial</td>
<td>179</td>
<td>93</td>
</tr>
<tr>
<td>Commercial (including Retail)</td>
<td>201</td>
<td>38</td>
</tr>
<tr>
<td><strong>Number of Sites</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Industrial</td>
<td>224</td>
<td>14</td>
</tr>
<tr>
<td>Commercial (including Retail)</td>
<td>559</td>
<td>6</td>
</tr>
<tr>
<td><strong>Land Supply</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Land (gross acres)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Industrial</td>
<td>256</td>
<td>160</td>
</tr>
<tr>
<td>Commercial (including Mixed Use)</td>
<td>83</td>
<td>16</td>
</tr>
<tr>
<td><strong>Number of Sites</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Industrial</td>
<td>248</td>
<td>24</td>
</tr>
<tr>
<td>Commercial (including Mixed Use)</td>
<td>198</td>
<td>2</td>
</tr>
<tr>
<td><strong>Land Surplus (Deficit)</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Land (gross acres)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Industrial</td>
<td>77</td>
<td>67</td>
</tr>
<tr>
<td>Commercial (including Retail)</td>
<td>(118)</td>
<td>(22)</td>
</tr>
<tr>
<td><strong>Number of Sites</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Industrial</td>
<td>24</td>
<td>10</td>
</tr>
<tr>
<td>Commercial (including Retail)</td>
<td>(361)</td>
<td>(4)</td>
</tr>
</tbody>
</table>

Source: ECONorthwest
Note: Totals may be off slightly as a result of rounding.

The baseline estimate of employment land sufficiency was developed using a demand-based approach to estimating employment land needs, which projects employment land need based predominantly on the forecast of employment growth, using recent employment densities (e.g., the number of employees per acre) to estimate future commercial and industrial land demand. Goal 9 requires that cities consider their objectives for economic development when developing an estimate of employment land need. The City of Eugene has not stated objectives for economic development as required by Goal 9, making it very difficult to identify the characteristics of sites needed to implement the economic development objectives. When Eugene decisionmakers develop this statement of economic development objectives (required by Goal 9), the analysis of commercial and industrial land demand may change, possibly substantially, to implement the economic development objectives.
**B.6.3 SUFFICIENCY OF EUGENE’S EMPLOYMENT LAND**

Table B-28 presented a comparison of employment land demand with employment land supply. Table B-28 only considered demand for employment uses located on employment land. Other uses, however, will require land in employment plan designations:

- **Public and semi-public uses.** These uses include schools, public facilities, and semi-public uses (e.g., churches). Public and semi-public land need is discussed in Appendix D.

- **Residential in employment plan designations.** Some residential buildings will locate in employment plan designations. Residential land demand in employment plan designations is discussed in Appendix C.

Table B-29 shows demand for employment land by plan designation. Table B-29 shows:

- **Commercial land demand.** Eugene has demand for 486 gross acres of commercial land based on the following uses:
  - 329 gross acres for employment uses shown in Table B-28
  - 114 gross acres of commercial land for public and semi-public uses
  - 43 gross acres of commercial land to accommodate residential uses

- **Industrial land demand.** Eugene has demand for 490 gross acres of industrial land shown in Table B-28.

<table>
<thead>
<tr>
<th>Table B-29. Employment land demand, Eugene UGB, 2011-2031</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Land Demand (Gross Acres)</strong></td>
</tr>
<tr>
<td><strong>Commercial</strong></td>
</tr>
<tr>
<td>Employment Uses</td>
</tr>
<tr>
<td>Public and Semi-Public Uses</td>
</tr>
<tr>
<td>Residential development in Commercial Plan Designations</td>
</tr>
<tr>
<td><strong>Total Commercial</strong></td>
</tr>
<tr>
<td><strong>Industrial</strong></td>
</tr>
<tr>
<td>Employment Uses</td>
</tr>
<tr>
<td><strong>Total Industrial</strong></td>
</tr>
<tr>
<td><strong>Total Employment Land Demand</strong></td>
</tr>
</tbody>
</table>

Source: ECONorthwest
Table B-30 shows a comparison of Eugene’s employment land supply with demand for employment land. Table B-30 shows:

- **Commercial land deficit.** Eugene has 98 gross acres of commercial land and demand for 486 gross acres of commercial land, resulting in a land deficit of 388 gross commercial acres.

- **Industrial land sufficiency.** Eugene has 924 gross acres of industrial land and demand for 490 gross acres of industrial land, resulting in a land surplus of 434 gross commercial acres. The analysis in Table B-30 does not account for special site characteristics of target industries. This analysis may be completed through Envision Eugene and may change the industrial land sufficiency.

<table>
<thead>
<tr>
<th>Land Supply (Gross Acres)</th>
<th>Land Demand (Gross Acres)</th>
<th>Land Surplus or Deficit (Gross Acres)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Commercial</td>
<td>98</td>
<td>486</td>
</tr>
<tr>
<td>Industrial</td>
<td>924</td>
<td>490</td>
</tr>
</tbody>
</table>

Source: ECONorthwest

**B.6.4 CHARACTERISTICS OF NEEDED SITES**

The Goal 9 Administrative Rule (OAR 660-009) requires that jurisdictions describe the characteristics of needed sites (OAR 660-009-0025(1)). The Administrative Rule defines site characteristics as follows in OAR 660-009-0005(11):

(11) "Site Characteristics" means the attributes of a site necessary for a particular industrial or other employment use to operate. Site characteristics include, but are not limited to, a minimum acreage or site configuration including shape and topography, visibility, specific types or levels of public facilities, services or energy infrastructure, or proximity to a particular transportation or freight facility such as rail, marine ports and airports, multimodal freight or transshipment facilities, and major transportation routes.

The site needs analysis in the previous section can be broken down into three broad categories: industrial, commercial office, and retail commercial. The characteristics of needed sites for each of these building types are described below. The description of the characteristics of needed sites may change based on discussion with decisionmakers about Eugene’s economic development strategy. All sites will need access to electricity, phone, and high-speed telecommunications.
Industrial

The site needs analysis (Table B-27) identified a need for 247 industrial sites, 23 of which are sites larger than five acres. Firms locating on industrial sites will need sites with the following characteristics.

- **Site size.** Eugene will need sites in a variety of sizes: 14 sites between 5 to 10 acres, six sites between 10 to 25 acres, two sites between 25 to 50 acres, and one site between 50 and 100 acres. The site needs analysis does not currently identify need for larger sites. The site needs analysis may be revised based on discussion with decisionmakers about Eugene’s economic development strategy.

- **Street access.** The need for street access for industrial firms may vary from access to local streets for small industrial firms to need to be located within ½ mile of an I-5 interchange for large industrial or warehouse and distribution forms. The freight traffic from industrial sites should not be routed through residential neighborhoods.

- **Rail access.** Some industrial uses may benefit from rail access, especially businesses that ship bulky, inexpensive items over long distances. Access to a rail line, or the possibility of developing a rail spur, is an advantage for some businesses.

- **Topography.** Industrial sites should be relatively flat with slopes of not more than 10%.

- **Access to services.** City services should be accessible to the site, including sanitary sewer, and municipal water during the 20-year planning period.

- **Land ownership.** Sites with a single owner are strongly preferred, to reduce the cost of land assembly.

- **Surrounding land uses.** Industrial sites should abut compatible uses, such as other industrial uses, warehousing and distribution, business parks or commercial uses. The site should not abut urban residential, school or park uses.

Commercial office and traded-sector services

The site needs analysis (Table B-27) identified a need 571 commercial sites, including 12 sites larger than five acres. These larger commercial sites could have a variety of development types: a campus site for a large business, a business park, a mixed office and light industrial park, or other groupings of commercial buildings.
• **Site size.** Eugene will need a variety of sites for commercial uses: 510 sites smaller than one acre, 35 sites between 1 and 2.5 acres, 14 sites between 2.5 to 5 acres, six sites between 5 to 10 acres, five sites between 10 to 25 acres, and one site between 25 to 50 acres. Some of the sites identified for commercial uses will be used for retail purposes. The site needs analysis does not currently identify need for larger sites for office or traded-sector services. The site needs analysis may be revised based on discussion with decisionmakers about Eugene’s economic development strategy.

• **Street access.** The need for street access for commercial firms may vary from access to local streets for small commercial firms to need to be located on an arterial or major collector streets for larger firms. Traffic from larger commercial sites should not be routed through residential neighborhoods.

• **Topography.** Office sites should be relatively flat slopes of not more than 15%.

• **Access to services.** City services should be accessible to the site, including sanitary sewer, and municipal water during the 20-year planning period.

• **Land ownership.** Sites with a two or fewer owners are necessary to reduce the cost and uncertainty of land assembly.

• **Surrounding land uses.** Office uses are compatible with light industrial uses, retail, other services, or high-density residential uses.

**Retail**

The site needs analysis (Table B-27) identified a need 571 commercial sites. The majority of retail uses are likely to locate on sites smaller than five acres. Some retail uses, such as large-format stores or regional shopping centers, may need sites larger than five acres.

• **Site size.** Eugene will need a variety of sites for retail uses: 510 sites smaller than one acre, 35 sites between 1 and 2.5 acres, 14 sites between 2.5 to 5 acres, six sites between 5 to 10 acres, five sites between 10 to 25 acres. Not all of these sites will be needed for retail uses, some will be used for commercial purposes.

• **Street access.** The need for street access for retail firms may vary from access to local streets for small retail establishments to need to be located on an arterial or major collector streets for larger retailers. Traffic from large retail sites should not be routed through residential neighborhoods.
- **Topography.** Larger retail sites should be relatively flat with slopes no greater than 10%.
- **Access to services.** City services should be accessible to the site, including sanitary sewer, and municipal water during the 20-year planning period.
- **Land ownership.** Sites with not more than two ownerships are necessary to reduce the cost and uncertainty of land assembly.
- **Surrounding land uses.** Retail uses are compatible with office, other services, industrial, business park, or high-density residential uses.
- **Visibility.** Most retail sites must be highly visible, especially larger retailers, who should be visible from arterial streets or Interstate 5.

**B.6.5 Attributes of Sites Needed to Accommodate Employment Growth**

Firms wanting to expand or locate in Eugene will look for a variety of site and building characteristics, depending on the industry and specific circumstances. Previous research conducted by ECO has found that while there are always specific criteria that are industry-dependent and firm-specific, many firms share at least a few common site criteria. In general, all firms need sites that are relatively flat, free of natural or regulatory constraints on development, with good transportation access and adequate public services. The exact amount, quality, and relative importance of these factors vary among different types of firms. This section discusses the site requirements for firms in industries with growth potential in the Eugene-Springfield Region, as indicated by the Oregon Employment Department forecast shown in Table B-19. Table B-31 summarizes the site needs of potential growth industries in Eugene.

**Table B-31. Summary of Site Attributes**

<table>
<thead>
<tr>
<th>Site Attribute</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Flat sites.</strong> Flat topography (slopes with grades below 10%) is needed by almost all firms in every industry except for small Office and Commercial firms that could be accommodated in small structures built on sloped sites. Flat sites are particularly important for Industrial firms in manufacturing, trucking, and warehousing, since these firms strongly prefer to locate all of their production activity on one level with loading dock access for heavy trucks.</td>
<td>The majority of Eugene’s vacant or redevelopable commercial and industrial sites are relatively flat.</td>
</tr>
<tr>
<td>Site Attribute</td>
<td>Comments</td>
</tr>
<tr>
<td>---------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| **Parcel configuration and parking.** Large Industrial and Commercial firms that require on-site parking or truck access are attracted to sites that offer adequate flexibility in site circulation and building layout. Parking ratios of 0.5 to 2 spaces per 1,000 square feet for Industrial and 2 to 3 spaces per 1,000 square feet for Commercial are typical ratios for these firms. In general rectangular sites are preferred, with a parcel width of at least 200-feet and length that is at least two times the width for build-to-suit sites. Parcel width of at least 400 feet is desired for flexible industrial/business park developments and the largest Commercial users. | More than half of Eugene’s vacant employment sites are smaller than five acres in size and one-third are one acre or smaller. Eugene only has two sites larger than 50 acres: a 57 acre site zoned for Light Medium Industrial and a 195 acre site zoned for Special Heavy Industrial, which is owned by the Metropolitan Wastewater Commission.

Given the scarcity of large employment sites in Eugene, firms may have difficulties finding sites with the right parcel configuration or that are large enough to meet the firms’ needs without assembling multiple small parcels. |
| **Soil type.** Soil stability and ground vibration characteristics are fairly important considerations for some highly specialized manufacturing processes, such as microchip fabrications. Otherwise soil types are not very important for Commercial, Office, or Industrial firms—provided that drainage is not a major issue. | Many of Eugene’s vacant employment sites larger than 5 acres, and especially those larger than 25 acres, are impacted by wetlands. The soil type and drainage issues may limit the type and intensity of development on some employment sites. |
| **Road transportation.** All firms are heavily dependent upon surface transportation for efficient movement of goods, customers, and workers. Access to an adequate highway and arterial roadway network is needed for all industries. Close proximity to a highway or arterial roadway is critical for firms that generate a large volume of truck or auto trips or firms that rely on visibility from passing traffic to help generate business. This need for proximity explains much of the highway strip development prevalent in urban areas today. | Businesses in Eugene have access to I-5, Highway 126, Highway 99, and Highway 58. Eugene also has a well-developed street network within the City. |
| **Rail transportation.** Rail access can be very important to certain types of heavy industries. The region has good rail access to many industrial sites. | Demand for sites with rail access may increase if fuel prices continue to increase, especially for firms that need to ship bulky items that do not need to be transported rapidly.

Eugene has some industrial sites with rail access. Some rail-dependent businesses have specific need for access to rail service. The availability of sites that can accommodate those needs will be determined on a case by case basis. |
<p>| <strong>Air transportation.</strong> Proximity to air transportation is important for some firms engaged in manufacturing, finance, or business services. | The Eugene Airport is located north and west of most of the UGB. |
| <strong>Transit.</strong> Transit access is most important for businesses in Health Services, which has a high density of jobs and consumer activity, and serves segments of the population without access to an automobile. | Availability of transit facilities may be increasingly important, especially if energy prices rise enough to discourage commuting by automobile. Eugene has access to transit through the Lane Transit District (LTD). There are multiple bus lines that run throughout Eugene and multiple buses that connect Eugene and Springfield, as well as outlying cities. |</p>
<table>
<thead>
<tr>
<th>Site Attribute</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Pedestrian and bicycle facilities.</strong></td>
<td>The ability for workers to access amenities and support services such as retail, banking, and recreation areas by foot or bike is increasingly important to employers, particularly those with high-wage professional jobs. The need for safe and efficient bicycle and pedestrian networks will prove their importance over time as support services and neighborhoods are developed adjacent to employment centers. Availabilty of pedestrian and bicycle facilities may be increasingly important, especially if energy prices rise enough to discourage commuting. The workers that are most likely to depend on these modes of transportation are those living in Eugene who live relatively close to their place of work.</td>
</tr>
<tr>
<td><strong>Fiber optics and telephone.</strong></td>
<td>Most if not all industries expect access to multiple phone lines, a full range of telecommunication services, and high-speed internet communications. Businesses in Eugene have access to high-speed telecommunications facilities.</td>
</tr>
<tr>
<td><strong>Potable water.</strong></td>
<td>Potable water needs range from domestic levels to 1,000,000 gallons or more per day for some manufacturing firms. However, emerging technologies are allowing manufacturers to rely on recycled water with limited on-site water storage and filter treatment. The demand for water for fire suppression also varies widely. Eugene has sufficient potable water to meet current and expected needs.</td>
</tr>
<tr>
<td><strong>Power requirements.</strong></td>
<td>Electricity power requirements range from redundant (uninterrupted, multi-sourced supply) 115 kva to 230 kva. Average daily power demand (as measured in kilowatt hours) generally ranges from approximately 5,000 kwh for small business service operations to 30,000 kwh for very large manufacturing operations. The highest power requirements are associated with manufacturing firms, particularly fabricated metal and electronics. For comparison, the typical household requires 2,500 kwh per day. Businesses in Eugene have access to sufficient power supply to accommodate most commercial and industrial users.</td>
</tr>
<tr>
<td><strong>Land use buffers.</strong></td>
<td>According to the public officials and developers/brokers ECO has interviewed, Industrial areas have operational characteristics that do not blend as well with residential land uses as they do with Office and Commercial areas. Generally, as the function of industrial use intensifies (e.g., heavy manufacturing) so too does the importance of buffering to mitigate impacts of noise, odors, traffic, and 24-hour 7-day week operations. Adequate buffers may consist of vegetation, landscaped swales, roadways, and public use parks/recreation areas. Depending upon the industrial use and site topography, site buffers range from approximately 50 to 100 feet. Selected commercial office, retail, lodging and mixed-use (e.g., apartments or office over retail) activities are becoming acceptable adjacent uses to light industrial areas. The need for land use buffers should be evaluated on a site by site basis and will be greatest in areas where heavier industrial uses mix with commercial and retail uses.</td>
</tr>
</tbody>
</table>
This appendix presents a pre-policy draft housing needs analysis for the City of Eugene. It is part of a larger project to determine whether Eugene has enough land to accommodate growth over the next 20 years. The estimate of land need presented in this appendix is a draft estimate and will be revised based on feedback from the City Council, work with stakeholder groups, and City staff.

This appendix presents a baseline analysis of residential land need in Eugene based on recent trends, forecasts of future growth, and current City policies. The baseline analysis is based on recent development trends and information about Eugene’s current development patterns. The assumptions used to develop the baseline analysis assume that Eugene’s future development will be similar to past and current development.

The purpose of developing a baseline analysis was to provide an estimate of land sufficiency as the basis for policy discussions about how land may develop in the future. Eugene’s future development patterns may be substantially different from past development patterns. The discussion of how Eugene should develop in the future will occur during the Envision Eugene project, which will model possible future development patterns based on changes in market dynamics and/or changes in development policies. Envision Eugene will focus on discussions about land use efficiency measures (e.g., increasing densities or increasing redevelopment), economic development policies, and other land use issues.

C.1 INTRODUCTION

House Bill 3337 requires that the City of Eugene establish an urban growth boundary (UGB) and demonstrate that there is enough land within the UGB to accommodate estimated housing needs for 20 years. This appendix presents a baseline housing needs analysis that makes this determination, consistent with requirements of Goal 10, ORS 197.296, and OAR 660-008. Additionally, the analysis considers the “safe harbor” provisions found in OAR 660-024. The methods used for this study generally follow the Planning for Residential Growth guidebook, published by the Oregon Transportation and Growth Management Program (1996).

The primary goals of the housing needs analysis are to (1) project the amount of land needed to accommodate the city’s future housing needs of all types, (2) evaluate the existing residential land supply within the Eugene Urban Growth Boundary to determine if it is adequate to meet that...
need, (3) to fulfill state planning requirements for a twenty-year supply of residential land, and (4) to meet the requirements of House Bill 3337. The primary product of the housing needs analysis is an estimate of the number of residentially zoned acres that will be necessary to accommodate all types of housing for the next twenty years.

**Organization of the appendix**

The rest of this appendix is organized as follows:

- **C.2. Framework for a Housing Needs Analysis** describes the theoretical and policy underpinnings of conducting a Goal 10 housing needs analysis for Oregon cities.

- **C.3. Recent Development Trends** summarizes building permit and subdivision data to evaluate residential development by density and mix for the period 2001 to 2008.

- **C.4. Housing Demand and Need** presents a housing needs analysis consistent with ORS 197.296 requirements and the *Planning for Residential Growth* Workbook.

- **C.5 Residential Land Sufficiency** estimates Eugene’s residential land sufficiency needed to accommodate expected growth over the planning period.
C.2 FRAMEWORK FOR A HOUSING NEEDS ANALYSIS

Economists view housing as a bundle of services for which people are willing to pay. Those services include shelter certainly, but also proximity to other attractions (jobs, shopping, recreation), amenity (type and quality of fixtures and appliances, landscaping, views), prestige, and access to public services (quality of schools). Because it is impossible to maximize all these services and simultaneously minimize costs, households must, and do, make tradeoffs. What they can get for their money is influenced by both economic forces and government policy. Moreover, different households will value what they can get differently. They will have different preferences, which in turn are a function of many factors like income, age of household head, number of people and children in the household, number of workers and job locations, number of automobiles, and so on.

Thus, housing choices of individual households are influenced in complex ways by dozens of factors; and the housing market in Lane County and Eugene are the result of the individual decisions of thousands of households. These points suggest the difficulties of projecting what types of housing will be built between 2011 and 2031.

The complexity of a housing market is a reality, but it does not obviate the need for some type of forecast of future housing demand and need, and for an assessment of the implications of that forecast for land demand and consumption. Such forecasts are inherently uncertain. Their usefulness for public policy often derives more from the explanation of their underlying assumptions about the dynamics of markets and policies than from the specific estimates of future demand and need. Thus, we start our housing analysis with a framework for thinking about housing and residential markets, and how public policy affects those markets.

C.2.1 HOUSING DEMAND VERSUS NEED

The language of Goal 10 and ORS 197.296 refers to housing need: it requires communities to provide needed housing types for households at all income levels. Goal 10's broad definition of need covers all households—from those with no home to those with second homes.

State policy does not make a clear distinction between need and demand. Following is our definition, which we believe to be consistent with definitions in state policy:

- *Housing need* can be defined broadly or narrowly. The broad definition is based on the mandate of Goal 10 that requires communities to plan for housing that meets the needs of
households at all income levels. Goal 10, though it addresses housing, emphasizes the impacts on the households that need that housing. Since everyone needs shelter, Goal 10 requires that a jurisdiction address, at some level, how every household will be affected by the housing market over a 20-year period. Public agencies that provide housing assistance (primarily the Department of Housing and Urban Development – HUD, and the Oregon Housing and Community Services Department - HCS) define housing need more narrowly. For them, households in need do not include most of the households that can purchase or rent housing at an “affordable” price, consistent with the requirements of their household characteristics. Households that cannot find and afford such housing have need: they are either unhoused, in housing of substandard condition, overcrowded, or paying more than their income and federal standards say they can afford.

- **Housing market demand** is what households demonstrate they are willing to purchase in the market place. Growth in population means growth in the number of households and implies an increase in demand for housing units. That demand is met, to the extent it is, primarily by the construction of new housing units by the private sector based on its judgments about the types of housing that will be absorbed by the market. ORS 197.296 includes a market demand component: buildable land needs analyses must consider the density and mix of housing developed over the previous five years or since their most recent periodic review, whichever is greater. In concept, what got built in that five-year period was the effective demand for new housing: it is the local equilibrium of demand factors, supply factors, and price.

In short, a housing needs analysis should make a distinction between housing that people might need (a normative, social judgment) and what the market will produce (an observable outcome).

Goal 10 does not make a clear distinction between the existing stock of housing and new housing. Because a lot of Goal 10 (and Goal 9, the Economy) is aimed at Goal 14 (Urbanization) and a determination of whether more land should be added to urban growth boundaries, there is usually more emphasis on new housing, which will require buildable land. In essence, a Goal-10 evaluation looks at (1) new households that the population forecasts presume will be living in a jurisdiction 20 years in the future, (2) estimates a number of new (“needed”) housing units, by type, and (3) estimates the amount of land they will consume when they are constructed.
Figure C-1 distinguishes between housing needs that are unmet and those that are met via market transactions. Housing need is the total number of housing units required to shelter the population. In that sense, housing need is approximately the number of households: every household needs a dwelling place. Some housing need is met through market transactions without much government intervention because households have the income to demand (purchase) housing services (as owners or renters). That demand is shown in the box on the right. Other households, however, have needs unmet, usually because they lack the resources to purchase housing services (financial need), but because of special needs as well (though, even here, the issue is still one of financial resources).

**Figure C-1. Relationship between housing need and housing demand**

Most housing market analyses and housing elements of comprehensive plans in Oregon make forecasts of new demand (what housing units will get built in response to market forces). Work by housing authorities is more likely to address housing need for special classes, especially low-income. It is the role of cities under Goal 10 to adopt and implement land use policies that will encourage provision of housing units that meet the needs of all residents.

It is unlikely that housing markets in any metropolitan area in the U.S. provide housing to meet the needs of every household. Even many upper-income households probably believe they "need" (want) more housing than their wealth and income allows them to afford. A typical standard, used by housing agencies around the country, is excess cost burden: does a household spend more than 30% of its income on housing? But even that standard may not comport with a common-sense notion of housing need: if upper income households are spending 40% of their income on housing because they are highly leveraged, betting on increases in property value, and have substantial wealth that they can invest in mortgage payments, do they have a housing need?
Independent of a strict legal interpretation, it is clear that any housing agency is focused on more basic housing needs. At the extreme there is homelessness: some people do not have any shelter at all. Close behind is substandard housing (with health and safety problems), space problems (the structure is adequate but overcrowded), and economic and social problems (the structure is adequate in quality and size, but a household has to devote so much of its income to housing payments that other aspects of its quality of life suffer). Location can also be a burden—households that live farther from work and shopping opportunities will have to spend more money on transportation. Moreover, while some new housing is government-assisted housing, public agencies do not have the financial resources to meet but a small fraction of that need. New housing does not, and is not likely to, fully address all these needs because housing developers, like any other business, strive for profits.

In fact, many of those needs are much more likely to be satisfied by existing housing: the older, used stock of structures that is usually less expensive per square foot than new housing. Thus, forecasting the type of new units that might be built in a region (by type, size, and price) is unlikely to bear any relationship to the type of housing to which most people with acute housing needs will turn to solve their housing problems. One key reason for this is that the cost of building new housing (land, services, materials, labor) is such that it is not “affordable” to low-income households at a price that recovers cost, much less one that generates normal profit. This “trickle-down” effect is well known among housing specialists. In most communities a quick comparison of new home prices with income distributions will underscore the fact that developers tend to focus on the move-up market and not on entry-level housing.

Viewed in the light of those definitions (e.g., housing demand and housing need), the requirements of Goal 10 need clarification. Goal 10 mandates that communities plan for housing that meets the needs of households at all income levels. Thus, Goal 10 implies that everyone has a housing need. As we have noted, however, it is hard to justify spending public resources on the needs of high-income households: they have the income to purchase (demand) adequate housing services in the housing market. The housing they can afford may not be everything they want, but most policymakers would agree that the difference does not classify as the same kind of need that burdens very-low-income households.

In the context of the statewide land use program, planning for housing is addressed through local comprehensive plans and development codes. Moreover, state policy places some restrictions on what local governments
can do. For example, ORS 197.309 prohibits local governments from requiring housing meet certain price points (often called inclusionary zoning).¹ In other words, cities are limited to regulating housing types and densities which correspond roughly to housing costs. It is important to note that increased density can decrease housing costs, but high density housing is not always low cost housing.

This study is not the place to resolve debates about definitions of housing need and the purposes of Goal 10. Our analysis of need addresses the Goal 10 requirements regarding financial need (ability to obtain housing) for future households as well as those households whose circumstances suggest that they will have special problems in finding adequate and affordable housing services. That analysis occurs after, and largely independent of, the forecast of new housing that is likely to be built to supply effective demand.

In summary, Goal 10 intends that cities and counties identify housing need and develop a land use policy framework that meets identified needs. One of the key issues that is addressed in a housing needs analysis is how much land is needed for different housing types, and therefore must be designated for different housing types. Providing sufficient land in the proper designations is one of the most fundamental land use tools local governments have to meet housing need.

¹ ORS 197.309 states: “…a city, county or metropolitan service district may not adopt a land use regulation or functional plan provision, or impose as a condition for approving a permit under ORS 215.427 or 227.178, a requirement that has the effect of establishing the sales price for a housing unit or residential building lot or parcel, or that requires a housing unit or residential building lot or parcel to be designated for sale to any particular class or group of purchasers.”
C.2.2 WHAT IS AFFORDABLE HOUSING?

The terms “affordable” and “low-income” housing are often used interchangeably. These terms, however, have different meanings:

- **Affordable housing** refers to a household’s ability to find housing within its financial means. A number of indicators exist that can be used to determine whether housing is affordable. One indicator is cost burden: households that spend more than 30% of their income on housing and certain utilities are considered to experience cost burden. Any household that pays more than 30% experiences cost burden and does not have affordable housing. Thus, affordable housing applies to all households in the community.

- **Low-income housing** refers to housing for “low-income” households. HUD considers a household low-income if it earns 80% or less of median family income. In short, low-income housing is targeted at households that earn 80% or less of median family income.

These definitions mean that any household can experience cost burden and that affordable housing applies to all households in an area. Low-income housing targets low-income households. In other words, a community can have a housing affordability problem that does not include only low-income households.

Many (maybe most) households that experience cost burden are composed of people who have jobs and are otherwise productive members of society. A household earning 80% of median family income in Eugene earns about $44,000 annually—or about $21.00 per hour for a full-time employee. Based on HUD affordability standards, the maximum affordable purchase price for a household earning $44,000 annually is about $132,000. Depending on household size, many of these households are eligible for government housing assistance programs.

In summary, any household can face housing affordability problems. Because they have more limited financial means, the incidence of cost burden is higher among low-income households. Statewide planning Goal 10 requires cities to adopt policies that encourage housing at price ranges commensurate with incomes. State land use policy does not distinguish

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2 Cost burden is a concept used by HUD. Utilities included with housing cost include electricity, gas, and water, but do not include telephone expenses. All of the indicators ECO has reviewed, including cost burden, have limitations that can distort results. Cost burden does not consider the impact of household size or accumulated assets. As a result a single-person household with an annual income of $20,000 and accumulated assets of $500,000 would be in the same category as a family of seven with an annual income of $20,000 and no accumulated assets.
between households of different income levels and requires cities to adopt policies that encourage housing for all households.

C.2.3 WHAT OBJECTIVES DO HOUSING POLICIES TYPICALLY TRY TO ACHIEVE?

The Practice of State and Local Planning classifies goals that most government housing programs address into four categories:

- **Community life.** From a community perspective, housing policy is intended to provide and maintain safe, sanitary, and satisfactory housing with efficiently and economically organized community facilities to service it. In other words, housing should be coordinated with other community and public services. Although local policies do not always articulate this, they are implicit in most local government operations. Comprehensive plans, zoning, subdivision ordinances, building codes, and capital improvement programs are techniques most cities use to manage housing and its development. Local public facilities such as schools, fire and police stations, parks, and roads are usually designed and coordinated to meet demands created by housing development.

- **Social and equity concerns.** The key objective of social goals is to reduce or eliminate housing inadequacies affecting the poor, those unable to find suitable housing, and those discriminated against. In other words, communities have an obligation to provide safe, satisfactory housing opportunities to all households, at costs they can afford, without regard to income, race, religion, national origin, family structure, or disability.

- **Design and environmental quality.** The location and design of housing affect the natural environment, residents’ quality of life, and the nature of community life. The objectives of policies that address design and environmental quality include neighborhood and housing designs that meet: household needs, maintain quality of life, provide efficient use of land and resources, reduce environmental impacts, and allow for the establishment of social and civic life and institutions. Most communities address these issues through local building codes, comprehensive land use plans, and development codes.

- **Stability of production.** Housing is a factor in every community’s economy. The cyclical nature of housing markets, however, creates

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uncertainties for investment, labor, and builders. The International City Manager’s Association suggests that local government policies should address this issue – most do not. Moreover, external factors (e.g. interest rates, cost of building materials, etc.) that bear upon local housing markets tend to undermine the effectiveness of such policies.

Despite the various federal and state policies regulating housing, most housing in the U.S. is produced by private industry and is privately owned. While the land use powers of local government have been an important factor in the production of housing, the role of local government has largely focused on regulation for public health and safety and provision of infrastructure. More recently, awareness has grown regarding the impact policies and regulations have had on the other aspects of community life such as costs of transportation and other infrastructure, access of residents to services and employment, and social interactions.
C.2.4 FRAMEWORK FOR DETERMINING WHETHER RESIDENTIAL LAND IS SUFFICIENT (STATE REQUIREMENTS)

The passage of the Oregon Land Use Planning Act of 1974 (ORS Chapter 197), established the Land Conservation and Development Commission (LCDC), and the Department of Land Conservation and Development (DLCD). The Act required the Commission to develop and adopt a set of statewide planning goals. Goal 10 addresses housing in Oregon and provides guidelines for local governments to follow in developing their local comprehensive land use plans and implementing policies.

At a minimum, local housing policies must meet the requirements of Goal 10 (ORS 197.295 to 197.314, ORS 197.475 to 197.490, and OAR 600-008). Goal 10 requires incorporated cities to complete an inventory of buildable residential lands and to encourage the availability of adequate numbers of housing units in price and rent ranges commensurate with the financial capabilities of its households.

Goal 10 defines needed housing types as “housing types determined to meet the need shown for housing within an urban growth boundary at particular price ranges and rent levels.” ORS 197.303 defines needed housing types:

(a) Housing that includes, but is not limited to, attached and detached single-family housing and multiple family housing for both owner and renter occupancy;

(b) Government assisted housing;

(c) Mobile home or manufactured dwelling parks as provided in ORS 197.475 to 197.490; and

(d) Manufactured homes on individual lots planned and zoned for single-family residential use that are in addition to lots within designated manufactured dwelling subdivisions.

The Department of Land Conservation and Development (DLCD) provides guidance on conducting a housing needs analysis in the document “Planning for Residential Growth: A Workbook for Oregon’s Urban Areas,” referred to as the Workbook. Figure C-2 provides a

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4 The definition of buildable residential land from OAR 600-008 is presented in the glossary in Appendix A.

5 Government assisted housing can be any housing type listed in ORS 197.303 (a), (c), or (d).

6 “Planning for Residential Growth: A Workbook for Oregon’s Urban Areas” was prepared for the State by ECONorthwest and Lane Council of Governments in June 1997.
Figure C-2. Process for assessing the sufficiency of residential land

The steps in this assessment are:

1. **Inventory of residential land.** Cities are required to demonstrate that its comprehensive plan or regional plan provides sufficient buildable lands within the urban growth boundary established pursuant to statewide planning goals to accommodate estimated housing needs for 20 years (ORS 197.296(2)). Cities must develop an inventory of vacant, partially vacant, mixed-use, and redevelopable residential lands (ORS 197.296(3)). The residential lands inventory was prepared by the Lane Council of Governments (LCOG). The methods and legal context for the BLI are described in Appendix A.
2. **Population forecast.** Cities are required to have a 20-year coordinated population forecast (ORS 195.036). The population forecast can be developed and coordinated by the county or it can be based on a safe harbor for population forecasting (OAR 660-024-0030). This study uses the coordinated population forecast for Eugene adopted by Lane County in June 2009.

3. **Housing Needs Analysis.** Cities with a population of 25,000 or more are required to comply with ORS 197.296 and must conduct an analysis of housing need by housing type and density range to determine the number of needed dwelling units and amount of land needed for each needed housing type in the next 20-years (ORS 197.296(3)(b)). The statute defines needed housing types as including (but not limited to): single-family detached, single-family attached, multifamily (for rental and ownership), mobile or manufactured housing in parks, manufactured housing on lots, and government assisted housing. Other housing types may be considered in the housing needs analysis. The steps in the housing needs analysis are:

   A) **Project housing units needed.** The projection of needed housing units is based on the growth in population from in the population forecast over the 20-year period. The projection considers other factors, such as number of people expected to live in group quarters, household size, housing mix, and vacancy rates. These assumptions are typically based on historical trends.

   B) **Identify trends that may affect housing mix and density.** These trends include relevant national, state, and local demographic and economic trends and factors that may affect the 20-year projection of structure type mix. Examples of these trends include: mortgage rates, homeownership rates, or population growth and in-migration. The housing needs analysis also considers demographic characteristics and housing trends that relate to demand for different types of housing. Examples of these trends include: regional and local trends in housing mix, the aging of the baby-boomers, or household income and housing affordability.

   C) **Determine types of housing that are likely to be affordable.** Cities must consider the housing needs of all households, from low-income households to affluent households. Cities are required to determine what types of housing is likely to be affordable to new households based on household income and housing costs. The assumption implicit in this analysis is that some housing types are more
affordable than others. For instance, renting an apartment is often more affordable than purchasing a single-family detached dwelling.

D) **Estimate the number of units needed by housing type.** The estimate of needed units by housing type is based on the projection for needed housing units, trends that may affect housing density and mix, and types of housing that are likely to be affordable. This estimate generally breaks down housing need into housing types and estimates the number and type of dwelling units needed in each plan designation.

4. **Determine actual mix and density of existing housing.** The analysis of actual mix and density of housing is based on residential development within the UGB since the last periodic review or five years, whichever is greater (ORS 197.296(5)). This determination is typically based on an analysis of building permits and land that was developed with each building permit.

5. **Determine average density and mix of needed housing.** Cities are required to determine the average density and mix of needed housing over the next 20-years (ORS 197.296(7)). The needed average density and mix of housing is based, in part, on the historical mix and density described in Step 4. If a range of densities is allowed within the plan designation, decision makers may give direction on the density assumptions that are used.

   A) **Compare needed density and mix to actual.** Cities are required to compare needed density and mix for housing over the 20-year period with actual density and mix (Step 5). If the needed density or mix is greater than the actual density or mix, cities are required to adopt land-use efficiency measures (Step 8) to increase the likelihood that residential development will occur at the identified density and mix (ORS 197.296(7)).

6. **Determine capacity of buildable residential land.** Cities are required to estimate the capacity of buildable residential land within the UGB (ORS 197.296(5)). Determining capacity is typically done by comparing the estimate of buildable land (both vacant and partially vacant) in residential plan designations with the density allowed in the residential plan designation. The result is an estimate of the number of dwellings that could be built on vacant residential land. Determining residential land capacity is complicated by a number of factors, such as: (1) development density on residential lands with constraints (such as steep slopes) may be lower than on lands without constraints, (2) plan
designations often allow a wide range of densities and determining the capacity of residential land requires assuming a specific density target. (3) different housing types are likely to develop at different densities within the same plan designation.

7. **Determine residential land sufficiency.** Cities must compare the need for residential land (Step 5) with the capacity of buildable residential land within the UGB (Step 6) to determine whether there is enough land in the UGB to meet expected housing need (ORS 197.296(6)).

8. **Consider land-use efficiency measures.** Cities are required to consider land-use efficiency measures if the housing needs analysis finds that the City may not meet identified housing needs (ORS 197.296(6) and (7)). The statute requires that the City evaluate land use efficiency measures when needed density and mix are different than actual density and mix.

This project did not include assessing or adopting land-use efficiency measures.

9. **Designation of lands for residential uses.** Cities that identify a deficiency of residential land (Step 7) must either adopt land-use efficiency measures and/or amend its urban growth boundary to include sufficient buildable lands to accommodate housing needs for the next 20-years (ORS 197.296(6)).

This project did not include potential amendments to the UGB.
C.3 Historical and Recent Development Trends

Analysis of historical development trends in Eugene provides insights into how the local housing market functions. The housing type mix and density are also key variables in forecasting future land need. Moreover, such an analysis is required by ORS 197.296. The specific steps are described in Task 2 of the DLCD Planning for Residential Lands Workbook:

1. Determine the time period for which the data must be gathered
2. Identify types of housing to address (all needed housing types)
3. Evaluate permit/subdivision data to calculate the actual mix, average actual gross density, and average actual net density of all housing types

ORS 197.296 requires the analysis of housing mix and density to include the past five years or since the most recent periodic review, whichever time period is greater. Eugene completed periodic review in 1999. The City, however, made significant changes to the residential densities allowed in its zoning code in August 2001. The period used in the analysis of housing density and mix is 2001 to 2008 because residential development prior to 2001 was not subject to the new standards in the zoning code.

The housing needs analysis presents information about residential development by housing types. There are multiple ways that housing types could be grouped. For example, housing types could be grouped by: (1) structure type (e.g., single-family detached, apartments, etc.), (2) tenure (e.g., distinguishing unit type by owner or renter units), (3) housing affordability (e.g., units affordable at given income levels) or (4) some combination of these categories. There are probably other ways to group housing types.

For the purposes of this study, we grouped housing types based on: (1) whether the structure is stand-alone or attached to another structure and (2) the number of dwelling units in each structure. The housing types used in this analysis are:

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7 Specifically, ORS 197.296(5) (b) states: “A local government shall make the determination described in paragraph (a) of this subsection using a shorter time period than the time period described in paragraph (a) of this subsection if the local government finds that the shorter time period will provide more accurate and reliable data related to housing capacity and need. The shorter time period may not be less than three years.”
• **Single-family detached** includes single-family detached units, secondary dwelling units, and manufactured homes on lots and in mobile home parks.

• **Single-family attached** includes row houses, townhouses, and condominiums.

• **Two to four units** is all structures with two to four dwelling units, such as duplexes, tri-plexes, and quad-plexes.

• **Five or more units** is all structures with five or more dwelling units per structure.

The reason for choosing these categories of housing type for the analysis is that the City collects data about residential development based on these structure types.

Using these structure types to forecast need for new housing does not provide information about housing issues that the City may want to consider. In addition, information is not systematically collected on some housing issues, either by the City, the U.S. Census, or other sources that systematically collect and analyze data. Two examples of housing types that are not shown in this categorization of housing types are:

• **Larger than average student households.** Recent development trends in neighborhoods near the University has included student housing that have higher than average household size. These structures may have three or four dwelling units per structure but each dwelling unit may have five or more bedrooms. These housing types affect the surrounding neighborhood differently than units with smaller household sizes, such as by using more parking than units with fewer persons per unit.

• **Affordable, small single-family units.** The housing needs analysis discusses the need for affordable housing, both for homeownership and rental housing. Small single-family units in established neighborhoods are one example of affordable ownership units. These units may be located in established neighborhoods where redevelopment is occurring, decreasing the availability of these housing types.
C.3.1 RESIDENTIAL DEVELOPMENT TRENDS

Figure C-3 shows residential building permits issued in Eugene between January 2001 and December 2008. During this period, Eugene issued a total of 4,961 building permits for new residential construction that allowed 6,678 dwelling units. Figure C-3 shows that the number of dwelling units approved varies from year to year and peaked at about 1,400 in 2005 and decreased to about 300 units permitted in 2008.

Table C-1 shows dwelling units approved through building permits issued for new residential construction by type within Eugene for 2001 to 2008. Table C-1 shows that the City issued permits for 6,678 units, averaging 835 permitted units per year. The data indicate that about 71% of residential dwellings approved were for single-family detached dwellings, while about 27% were for structures with two or more units and single-family attached units accounted for 2% of units permitted.

![Figure C-3. Dwelling units approved through building permits issued for new residential construction, Eugene, January 2001 to January 2008](image)

Table C-1. Dwelling units approved through building permits issued for new residential construction by structure type, Eugene, January 2001 to January 2008

<table>
<thead>
<tr>
<th>Structure type</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>Total</th>
<th>Percent of Total</th>
<th>Annual Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single-family detached</td>
<td>708</td>
<td>738</td>
<td>633</td>
<td>680</td>
<td>836</td>
<td>585</td>
<td>341</td>
<td>217</td>
<td>4,738</td>
<td>71%</td>
<td>592</td>
</tr>
<tr>
<td>Single-family attached</td>
<td>6</td>
<td>3</td>
<td>6</td>
<td>6</td>
<td>55</td>
<td>6</td>
<td>50</td>
<td>13</td>
<td>145</td>
<td>2%</td>
<td>18</td>
</tr>
<tr>
<td>Two to four units</td>
<td>37</td>
<td>19</td>
<td>39</td>
<td>65</td>
<td>68</td>
<td>45</td>
<td>56</td>
<td>12</td>
<td>341</td>
<td>5%</td>
<td>43</td>
</tr>
<tr>
<td>Five or more units</td>
<td>90</td>
<td>127</td>
<td>5</td>
<td>230</td>
<td>453</td>
<td>305</td>
<td>185</td>
<td>59</td>
<td>1,454</td>
<td>22%</td>
<td>182</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>841</td>
<td>887</td>
<td>683</td>
<td>981</td>
<td>1,412</td>
<td>941</td>
<td>632</td>
<td>301</td>
<td>6,678</td>
<td>100%</td>
<td>835</td>
</tr>
</tbody>
</table>

Source: City of Eugene Planning Department, 2008
C.3.2 Trends in Housing Mix

Housing mix is the mixture of housing (structure) types (e.g., single-family detached or apartments) within a city. State law requires a determination of the future housing mix in the community and allows that determination to be based on different periods: (1) the mix of housing built in the past five years or since the most recent periodic review, whichever time period is greater, (2) a shorter time period if the data will provide more accurate and reliable information, or (3) a longer time period if the data will provide more accurate and reliable information (ORS 197.296). This section presents housing mix data for two periods (1) housing mix over the 2001 to 2008 period and (2) housing mix over the 1990 to 2007 period.

There are several ways to look at change in housing mix over time, each of which shows a slightly different mix of housing. Table C-1 shows the mix of building permits issued in Eugene between 2001 and 2008. Table C-2 shows changes in housing mix observed over the 2001 to 2008 period. Table C-3 shows changes in the mix of housing stock in Eugene over the 1990 to 2007 period. The information about housing mix for building permits issues and for dwelling units built over the last few years (Tables C-1 and C-2) provide useful information about recent trends in housing mix, which may be useful in forecasting changes in housing mix. Longer term information about the mix of the City’s entire housing stock (Table C-3) also provides useful information for forecasting changes in housing mix.

Table C-2 shows the housing mix for residential development over the 2001 to 2008 period. ECO selected this time period over the 2001 to 2008 period because it shows housing mix that occurred since the City’s revised zoning ordinance went into effect in 2001. About 69% of housing developed was single-family detached (including manufactured homes), 10% was single-family attached, and the remaining 21% were structures with two or more units. The share of single-family housing varied from a high of 90% in 2003 to a low of 45% in 2007.
Table C-2. Observed housing mix, Eugene, 2001 to 2008

<table>
<thead>
<tr>
<th>Year</th>
<th>Single-family detached</th>
<th>Single-family attached</th>
<th>Two to four units</th>
<th>Five or more units</th>
</tr>
</thead>
<tbody>
<tr>
<td>2001</td>
<td>86%</td>
<td>2%</td>
<td>4%</td>
<td>8%</td>
</tr>
<tr>
<td>2002</td>
<td>85%</td>
<td>0%</td>
<td>4%</td>
<td>11%</td>
</tr>
<tr>
<td>2003</td>
<td>90%</td>
<td>1%</td>
<td>7%</td>
<td>1%</td>
</tr>
<tr>
<td>2004</td>
<td>67%</td>
<td>1%</td>
<td>4%</td>
<td>28%</td>
</tr>
<tr>
<td>2005</td>
<td>68%</td>
<td>4%</td>
<td>7%</td>
<td>21%</td>
</tr>
<tr>
<td>2006</td>
<td>52%</td>
<td>36%</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>2007</td>
<td>45%</td>
<td>26%</td>
<td>9%</td>
<td>19%</td>
</tr>
<tr>
<td>2008</td>
<td>54%</td>
<td>1%</td>
<td>5%</td>
<td>40%</td>
</tr>
<tr>
<td>Average</td>
<td>69%</td>
<td>10%</td>
<td>6%</td>
<td>15%</td>
</tr>
<tr>
<td>Total Units</td>
<td>4,503</td>
<td>660</td>
<td>371</td>
<td>998</td>
</tr>
</tbody>
</table>

Source: City of Eugene Planning Department, 2008
Note: Single-family detached includes secondary dwelling units and manufactured homes.

A caveat about the information presented in Table C-2: the data about residential development is both complex and somewhat scant. Each development may have idiosyncrasies, such as factors that limit development density or footprint (such as a stream). Moreover, it is typical to see cycles in building: for example, a lot of single-family units get built so then a lot of multifamily follows. For example, the achieved mix over the 2001 to 2008 period (69% single-family housing types and 31% attached housing types) was the result of an unusual housing market bubble, which is not likely to be repeated over the 20-year period. ECO recommends looking at building trends broadly and on average over a several-year period (e.g., for the entire 2001 to 2008 period), rather than on a year-by-year basis.

Table C-3 shows changes in Eugene’s housing mix from 1990 to 2007, based on U.S. Census data. Between 1990 and 2007, Eugene increased its housing stock by 44%, adding 20,904 dwelling units. The mix of housing did not change substantially. The share of single-family detached units (e.g., single-family houses and manufactured homes) remained at 61% over the 17 year period, with more than 13,000 single-family units built.

More than one-third of new dwellings built in Eugene over the 1990 to 2007 period were attached housing types (e.g., single-family attached and structures with two or more units), accounting for more than 7,700 new units built. The share of attached structures did not change substantially, accounting for 40% of dwellings in 1990 and 39% of dwellings in 2007.
Table C-3. Dwelling units by type, Eugene city limits, 1990, 2000, and 2007

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Single-family detached</td>
<td>28,768</td>
<td>60%</td>
<td>36,151</td>
<td>59%</td>
<td>41,923</td>
<td>61%</td>
<td>13,155</td>
<td>63%</td>
<td>46%</td>
</tr>
<tr>
<td>Single-family attached</td>
<td>3,264</td>
<td>7%</td>
<td>4,011</td>
<td>7%</td>
<td>4,828</td>
<td>7%</td>
<td>1,564</td>
<td>7%</td>
<td>48%</td>
</tr>
<tr>
<td>Two to four units</td>
<td>4,886</td>
<td>10%</td>
<td>5,877</td>
<td>10%</td>
<td>6,773</td>
<td>10%</td>
<td>1,887</td>
<td>9%</td>
<td>39%</td>
</tr>
<tr>
<td>Five or more units</td>
<td>11,073</td>
<td>23%</td>
<td>15,293</td>
<td>25%</td>
<td>15,371</td>
<td>22%</td>
<td>4,298</td>
<td>21%</td>
<td>39%</td>
</tr>
<tr>
<td>Total</td>
<td>47,991</td>
<td>100%</td>
<td>61,332</td>
<td>100%</td>
<td>68,895</td>
<td>100%</td>
<td>20,904</td>
<td>100%</td>
<td>44%</td>
</tr>
</tbody>
</table>


Note: Single-family detached housing includes manufactures homes. The Census does not distinguish between manufactured homes in parks or on single lots.

C.3.3 TRENDS IN TENURE

The housing mix by type (i.e., percentage of single family, multi-family, and mobile/manufactured home units) is an important variable in any housing needs assessment. Distribution of housing types is influenced by a variety of factors, including the cost of new home construction, area economic and employment trends, demographic characteristics, and amount of land zoned to allow different housing types and densities.

Table C-4 shows changes in Eugene’s tenure for occupied units from 1990-2007. Eugene had a 3% increase in homeownership over the eight year period. About 54% of housing in Eugene was owner-occupied in 2007, up from 51% in 1990. Eugene’s homeownership rate was lower than the County average of 63% or the State average of 65%.

Table C-4. Change in tenure, occupied units, Eugene, 1990 and 2007

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Owner Occupied</td>
<td>23,483</td>
<td>51%</td>
<td>34,825</td>
<td>54%</td>
<td>11,342</td>
<td>48%</td>
</tr>
<tr>
<td>Renter Occupied</td>
<td>22,791</td>
<td>49%</td>
<td>29,750</td>
<td>46%</td>
<td>6,959</td>
<td>31%</td>
</tr>
<tr>
<td>Total</td>
<td>46,274</td>
<td>100%</td>
<td>64,575</td>
<td>100%</td>
<td>18,301</td>
<td>40%</td>
</tr>
</tbody>
</table>

Source: U.S. Census 1990 SF3 H008, American Community Survey 2007 B25003

Note: The number of dwelling units in Eugene shown in Tables C-2, C-4, and C-5 differ because the tables show different information. Table C-3 shows all units, Table C-4 shows occupied units, and Table C-5 shows occupied units where housing type is known.

Table C-5 shows type of dwelling by tenure (owner/renter-occupied) in Eugene in 2007. The results show that single-family detached housing types have a much higher ownership rate than other housing types—about 90% of owner-occupied units were single-family detached. Multifamily housing types were predominately renter occupied. It is also notable that 71% of the single-family attached dwellings were renter occupied. By contrast, 10% of single-family detached units were renter occupied in 2007.
Table C-5. Housing units by type and tenure, Eugene, 2007

<table>
<thead>
<tr>
<th>Housing type</th>
<th>Owner Occupied</th>
<th>Renter Occupied</th>
<th>All Dwellings</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>DU by Type</td>
<td>Percent by Type</td>
<td>DU by Type</td>
</tr>
<tr>
<td>Single-family detached</td>
<td>32,799</td>
<td>90%</td>
<td>3,458</td>
</tr>
<tr>
<td>Single-family attached</td>
<td>1,347</td>
<td>29%</td>
<td>3,335</td>
</tr>
<tr>
<td>Two to four units</td>
<td>237</td>
<td>4%</td>
<td>5,860</td>
</tr>
<tr>
<td>Five or more units</td>
<td>442</td>
<td>3%</td>
<td>13,279</td>
</tr>
<tr>
<td>Total</td>
<td>34,825</td>
<td></td>
<td>25,932</td>
</tr>
</tbody>
</table>

Source: American Community Survey 2007 B25032

Note: Single-family detached includes manufactured homes.
Note: The number of dwelling units in Eugene shown in Tables C-2, C-4, and C-5 differ because the tables show different information. Table C-3 shows all units, Table C-4 shows occupied units, and Table C-5 shows occupied units where housing type is known.
C.3.4 DENSITY

Housing density is the density of housing by structure type, expressed in dwelling units per net or gross acre. Like housing mix, State law requires determination of housing density based on analysis of data and suggests using an analysis of housing density developed over the past five years or since the most recent periodic review, whichever time period is greater, or for a shorter or longer time period.

The U.S. Census does not track residential development density. This study analyzes housing density based on development between 2001 and 2008 (rather than 1999 to 2008) because changes to the City’s zoning code went into effect in 2001 that affect housing development. Eugene City staff concluded that data prior to 1996 is not accurate and consistent enough for an analysis of longer-term housing densities.

Table C-6 shows average net residential development by structure type for the 2001 to 2008 period. Table C-6 shows that 4,727 tax lots had residential development during the 2001 to 2008 period, adding 6,532 new dwelling units. Some tax lots had pre-existing multifamily dwelling units. The average density for all residential development over the 2001 to 2008 period was 7.2 dwellings per net acre.

Table C-6 shows that single-family detached housing (including secondary dwelling units and manufactured homes) averaged a density of 5.4 dwelling units per net acre. Multifamily structures had a density of 8.6 dwelling units per net acre for two to four units, 20.2 units per net acre for single-family attached, and structures with five or more units had a density of 24.1 units per net acre.

---

8 OAR 660-024-0010(6) uses the following definition of net buildable acre. “Net Buildable Acre” consists of 43,560 square feet of residentially designated buildable land after excluding future rights-of-way for streets and roads. While the administrative rule does not include a definition of a gross buildable acre, using the definition above, a gross buildable acre will include areas used for rights-of-way for streets and roads. Areas used for rights-of-way are considered unbuildable.

9 The density of 7.2 units per net acre accounts for all development on the 4,727 tax lots shown in Table C-6. While the density analysis focuses on development that occurred between 2001 and 2008, we would underestimated density on these tax lots if we did not account for multifamily dwellings built in phased development prior to 2001.
Table C-6. Average development density by structure type, dwelling units per net acre, 2001-2008, Eugene UGB

<table>
<thead>
<tr>
<th>Structure Type</th>
<th>Tax Lots</th>
<th>Multifamily lots built prior to 2001</th>
<th>All DU built 2001 to 2008</th>
<th>Total DU</th>
<th>Net Acres</th>
<th>DU/Net Ac</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single-family detached</td>
<td>4,335</td>
<td>NA</td>
<td>4,503</td>
<td>4,503</td>
<td>837</td>
<td>5.4</td>
</tr>
<tr>
<td>Single-family attached</td>
<td>173</td>
<td>NA</td>
<td>660</td>
<td>660</td>
<td>33</td>
<td>20.2</td>
</tr>
<tr>
<td>Structures with 2 to 4 units</td>
<td>178</td>
<td>75</td>
<td>371</td>
<td>446</td>
<td>52</td>
<td>8.6</td>
</tr>
<tr>
<td>Structures with 5 or more units</td>
<td>41</td>
<td>412</td>
<td>998</td>
<td>1,410</td>
<td>59</td>
<td>24.1</td>
</tr>
<tr>
<td>Total</td>
<td>4,727</td>
<td>487</td>
<td>6,532</td>
<td>7,019</td>
<td>980</td>
<td>7.2</td>
</tr>
</tbody>
</table>

Source: LCOG GIS data and City of Eugene Planning Department, 2008

Note: City staff ground-truthed the density analysis results through review of aerial photos, review of RLID and GeoDart address files and a review of relevant permit data. Staff found that some lots had residential development built prior to 2001, through phased development of multifamily housing (structures with more than two units) in Medium and High Density Plan Designations. Phased development often occurs over a number of years and may include developing multiple types of housing on the same tax lot. Phased development over multiple years on one tax lot does not generally occur in Low Density Residential or with single-family housing. Table C-6 accounts for phased development, in order to accurately determine the net density.

Table C-7 shows average development density by Comprehensive Plan Designation and structure type for the 2001 to 2008 period. Table 5 shows that residential density varied by plan designation and structure type. About 66% of new development occurred in Low Density Residential, 19% in Medium Density Residential, 15% in High Density Residential, and the remaining less than 1% occurred in a mixed use designation.

Table C-7. Average development density by Comprehensive Plan Designation and structure type, dwelling units per net acre, 2001-2008, Eugene UGB

<table>
<thead>
<tr>
<th>Plan Designation</th>
<th>Single-family detached</th>
<th>Single-family attached</th>
<th>Structures with 2 to 4 units</th>
<th>Structures with 5 or more units</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low Density Residential</td>
<td>5.2</td>
<td>35.5</td>
<td>4.3</td>
<td>na</td>
<td>5.2</td>
</tr>
<tr>
<td>Medium Density Residential</td>
<td>8.3</td>
<td>16.4</td>
<td>10.9</td>
<td>18.2</td>
<td>13.2</td>
</tr>
<tr>
<td>High Density Residential</td>
<td>13.8</td>
<td>36.7</td>
<td>31.0</td>
<td>33.6</td>
<td>31.0</td>
</tr>
<tr>
<td>Medium Density Residential Mixed Use</td>
<td>3.7</td>
<td>na</td>
<td>26.4</td>
<td>36.2</td>
<td>17.1</td>
</tr>
<tr>
<td>High Density Res Mixed Use</td>
<td>5.8</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>5.8</td>
</tr>
<tr>
<td>Mixed Use</td>
<td>8.5</td>
<td>na</td>
<td>5.9</td>
<td>na</td>
<td>7.2</td>
</tr>
<tr>
<td>Average</td>
<td>5.4</td>
<td>20.2</td>
<td>8.6</td>
<td>24.1</td>
<td>7.2</td>
</tr>
</tbody>
</table>

Source: LCOG GIS data and City of Eugene Planning Department, 2008
C.3.5 REDEVELOPMENT TRENDS

The City of Eugene has a legal obligation to inventory the supply and estimate the capacity of buildable land within the UGB. The inventory must consider land that may be used for residential infill and redevelopment.\(^{10}\) The City does not have an obligation to “create a map or document that may be used to verify and identify specific lots or parcels that have been determined to be buildable lands”\(^{11}\) to show residential infill and redevelopment.

OAR 660-008-0005(6) defines redevelopable land as “land zoned for residential use on which development has already occurred but on which, due to present or expected market forces, there exists the strong likelihood that existing development will be converted to more intensive residential uses during the planning period.” The administrative rule does not define what constitutes a “strong likelihood” for redevelopment.

Moreover, neither Goal 10, OAR 660-008, nor ORS 197.296 define “infill.” Planners and Oregon land-use policy have seemed to define infill as either (1) development that occurs in areas that are already largely developed, or (2) development that occurs on “partially vacant” land. Both of those informal definitions have problems. The first one has no agreed upon, much less legally adopted, way of being measured. The second one requires a definition of partially vacant (generally agreed to mean taxlots that have some development, but less—perhaps substantially less—than plan and zone designations would allow, and some amount of vacant acreage—perhaps as little as a quarter acre that might be feasibly developed).

For the purposes of this study, we define residential redevelopment as development that (1) occurs on land with existing development, and (2) results in a net increase in dwelling units. The second condition means that the replacement of one dwelling unit with one other dwelling unit would not be counted. This definition includes infill on land where there is no demolition, as well as redevelopment that requires demolition of existing structures. Examples of residential redevelopment include: (1) demolition of a single-family dwelling and development of a duplex or apartment building, and (2) partitioning a lot with a single-family house and building a new single-family dwelling on the newly created lot.\(^{12}\)

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\(^{10}\) The legal requirements are described in ORS 197.296(3)(a) and (4)(a)(D).

\(^{11}\) Quoted from ORS 197. 296(4)(c).

\(^{12}\) Subdividing a lot and building an additional dwelling is sometimes referred to as infill. For the purposes of this study, we have categorized this type of development as redevelopment.
Methods for estimating redevelopment

Data about historical residential redevelopment is not generally available for most cities. In previous studies conducted by ECONorthwest and other organizations, redevelopment has been addressed by assuming that a certain percentage of residential growth will be addressed through redevelopment, generally from 5% to 20% of new residential development.\(^{13}\) Metro (the regional governing body in the Portland region) assumed that “refill” (its term for the combination of infill on partially vacant land and redevelopment) would account for 26% of new residential development in its 2002 study\(^{14}\) and is currently developing a refill rate assumption for their on-going residential land needs study.

One commonly used method to estimate capacity for infill and redevelopment is by arraying residential tax lots on the basis of the ratio of their improvement value to their land value ratios.\(^{15}\) A ratio of less than 1:1 (i.e., where the improvement is worth less than the land) is a typical threshold. While that method is reasonable, convenient, and relatively inexpensive, people familiar with the process of redevelopment correctly point out that the redevelopment decision is affected by many other factors (see Figure C-4), and that many parcels with ratios less than 1:1 will not redevelop during the 20-year forecast period, and many parcels with ratios greater than 1:1 will redevelop. The ratio is hardly a definitive measure of “strong likelihood.”

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\(^{13}\) ECONorthwest used this method in studies for the following cities: Redmond, Madras, Ontario, Lebanon, Coburg, Ashland, and McMinnville, all of which have been adopted and acknowledged by DLCD.

\(^{14}\) The Metro study is accessible from: http://library.oregonmetro.gov/files/ugr-residentialland.pdf

\(^{15}\) An improvement to land value ratio compares the assessed value of the improvements with the assessed value of the land. For example, an improvement to land value ratio of 0.75:1 shows that the improvement is worth less than the land (75% as much as the land). A ratio of 2:1 shows that the improvement is worth twice the value of the land.
The professional literature of planning, urban economics, real estate, and appraisal does not have much to say about redevelopment rates. Conceptually, the factors likely to influence redevelopment (broadly, the conditions of demand, supply, and price for built space and the factors that go into creating that built space) are clear enough, but the magnitude of the empirical relationships has few studies and no professional consensus. The property owner / developer decision to redevelop is not simply deterministic, but complexly probabilistic. The requirements of Oregon law withstanding, no real estate analyst would have any confidence in making a property-specific assessment for every property in an urban area of the likelihood that the property would redevelop over a 20-year period.

The methodology used to estimate the rate of redevelopment over the 2001 to 2008 period considered the requirements of Goals 10 and 14, as well as the points described above. The estimate of the historical redevelopment rate used the following assumptions and methods:

1. Treat “infill” as a subset of “redevelopment.”
2. Measure the amount of recent redevelopment using the methods using data from LCOG’s address file to estimate the number of new residential addresses that were added between 2001 and 2008 to tax lots identified as developed in 2001. According to LCOG’s quality
assurance testing, the address file is very accurate and that they feel that this method of estimating redevelopment makes sense. We (ECO) believe that this is the first study to have used this advanced method, that it gives accurate results, and that it is the best information available about the actual amount of residential redevelopment (as defined by state rules) that occurred over a specific, identified period.

3. Use the estimate of the amount of recent redevelopment to create a rate that can be used as a baseline forecast for estimating future redevelopment. For example, if 500 new dwelling units (as identified by new residential addresses) were added over an eight-year period (2001 to 2008, inclusive), then redevelopment accounted, historically for an average of 62 dwelling units per year; if that rate is used for the baseline forecast, then about 1,250 new dwelling units will be built on developed land over the 20-year planning period.

4. Subtract the units estimated to be provided via redevelopment during the planning period (in the example above, 1,250 dwelling units) from the total needed (based on calculations described earlier in the memorandum) to get an estimate of the number of new dwelling units that will be built during the 20-year planning period on land defined as “vacant” in the BLI.

5. City staff checked the results of the analysis described in Steps 1 through 4 above, which initially showed that 722 dwelling units built between 2001 and 2008 resulted from redevelopment. Staff checked the records associated with the redevelopment status of 500 of the 722 dwelling units. The selection criteria that staff used to choose which instances of redevelopment to review was: (1) all instances where redevelopment added four or more addresses (31 tax lots); (2) addresses flagged by CAC members as possibly incorrectly identified as redevelopment; and (3) randomly selecting several addresses for review. Staff’s analysis included review of aerial photos, review of RLID and GeoDart address files and a review of relevant permit data. This analysis concluded with the revised number of dwelling units shown in Table C-8.

The next section describes results of the first two steps in the analysis and the resulting estimate of the historical rate of redevelopment.
Estimate of historical redevelopment for 2001 to 2008

Recent residential redevelopment includes lots that had addresses coded before 2001 and received additional addresses after 2001. ECO used the following criteria to identify residential redevelopment: (1) lots that had one or more address prior to 2001; and (2) lots that had additional addresses on the lot after 2001. Plan designation and zoning were not used as selection criteria. Rather, new residential units were identified by land use categories and improvement type. This methodology is consistent with the definition of redevelopment presented in the previous section.

Table C-8 shows that between 2001 and 2008 a total of 527 new dwelling units occurred on tax lots that already had dwellings. Of these, 207 were on lots that had single-family dwellings and 144 were on lots that had retirement homes. All of the remaining units were on lots with some type of multi-family dwellings.

Table C-8. Residential redevelopment: new dwellings on developed lots, Eugene UGB, 2001-2008

<table>
<thead>
<tr>
<th>Existing Unit Type</th>
<th>Existing DU</th>
<th>New DU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apartment With 1 To 4 Units</td>
<td>64</td>
<td>52</td>
</tr>
<tr>
<td>Apartment With 5 To 19 Units</td>
<td>120</td>
<td>59</td>
</tr>
<tr>
<td>Quad</td>
<td>4</td>
<td>2</td>
</tr>
<tr>
<td>Retirement Home</td>
<td>169</td>
<td>144</td>
</tr>
<tr>
<td>Single Family Housing</td>
<td>157</td>
<td>207</td>
</tr>
<tr>
<td>Two Family Housing Unit-Duplex</td>
<td>65</td>
<td>63</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>579</strong></td>
<td><strong>527</strong></td>
</tr>
</tbody>
</table>

Source: LCOG taxlot and address data; analysis by ECONorthwest
Note: Staff review of the analysis of redevelopment (described in the section above) reduced the estimate of new housing resulting from redevelopment from 722 to 527 dwellings.

In summary, this analysis identified 527 new dwellings were constructed between 2001 and 2008 that could be considered redevelopment. This is about 8% of all housing production during the 2001 to 2008 period. New dwellings constructed on lots with pre-existing development is among the best indicators of redevelopment available because it provides an actual unit count of new housing by housing type for the analysis period.
C.4 HOUSING DEMAND AND NEED

A previous section described the framework for conducting a housing "needs" analysis. ORS 197.296 (HB 2709) requires cities over 25,000 or fast growing cities to conduct a housing needs analysis. A recommended approach is described in Task 3 of the HB 2709 Workbook. The specific steps in the housing needs analysis are:

1. Project number of new housing units needed in the next 20 years.
2. Identify relevant national, state, and local demographic and economic trends and factors that may affect the 20-year projection of structure type mix.
3. Describe the demographic characteristics of the population and, if possible, housing trends that relate to demand for different types of housing.
4. Determine the types of housing that are likely to be affordable to the projected households based on household income.
5. Estimate the number of additional needed units by structure type.
6. Determine the needed density ranges for each plan designation and the average needed net density for all structure types. This project does not identify the needed density and mix for housing in Eugene. This step will be addressed in the Envision Eugene process.

C.4.1 STEP 1: PROJECT NUMBER OF NEW HOUSING UNITS NEEDED IN THE NEXT 20 YEARS

Step 1 in the housing needs analysis is to project the number of new housing units needed during the planning period. This section describes the key assumptions and presents a baseline estimate of new housing units needed in Eugene between 2011 and 2031. The key assumptions are based on the best available data and rely on safe harbor provisions, when available. Trends that may affect these assumptions and Eugene’s housing need are described in Step 2 of the housing needs analysis.

16 A safe harbor is an assumption that a city can use in a housing needs analysis that the State has said will satisfy the requirements of Goal 14. OAR 660-024 defined a safe harbor as “... an optional course of action that a local government may use to satisfy a requirement of Goal 14. Use of a safe harbor prescribed in this division will satisfy the requirement for which it is prescribed. A safe harbor is not the only way or necessarily the preferred way to comply with a requirement and it is not intended to interpret the requirement for any purpose other than applying a safe harbor within this division.”
Population

A 20-year population forecast (in this instance, 2011 to 2031) is the foundation for estimating needed new dwelling units. On June 17, 2009, Lane County adopted a new coordinated population forecast for this period. The city formally adopted this forecast into the Metro Plan, for use in all future planning efforts. The forecast projects that population inside the Eugene UGB will grow from 177,775 people in 2010 to 213,238 people in 2031. Extrapolating the 2010 population to 2011 (using the adopted growth rate of 0.88% per year), Eugene’s forecast population for 2011 is 179,338 people. The baseline analysis assumes that Eugene will grow by 33,900 people between 2011 and 2031.

Persons in group quarters

Persons in group quarters do not consume standard housing units: thus, any forecast of new people in group quarters is typically backed out of the population forecast for the purpose of estimating housing demand. Group quarters can have a big influence on housing in cities with colleges (dorms), prisons, or a large elderly population (nursing homes). In general, any new requirements for these housing types will be met by institutions (colleges, government agencies, health-care corporations) operating outside what is typically defined as the housing market. Group quarters, however, require land and are typically built at densities that are comparable to multiple-family dwellings.

Table C-9 shows persons in group quarters in the City of Eugene as reported by the 1990 and 2000 Census and 2007 American Community Survey. The share of people in group quarters varied from 5.5% in 1990 to 4.4% in 2000 and increased back to 5.3% in 2007.

| Table C-9. Persons in group quarters, City of Eugene, 1990, 2000, and 2007 |
|-----------------------------|-----------------|-----------------|
|                             | 1990            | 2000            | 2007            |
| Total Population            | 112,669         | 137,893         | 153,612         |
| Persons in Group Quarters   | 6,174           | 6,086           | 8,160           |
| Percent in Group Quarters   | 5.5%            | 4.4%            | 5.3%            |

Source: U.S. Census 1990 SF1 P028, U.S. Census 2000 SF1 P37, American Community Survey 2007 B26001

The baseline analysis assumes that 5.3% of new persons (1,865 persons) in Eugene between 2011 and 2031 will reside in group quarters. The

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17 Eugene and Springfield adopted Ordinance 20437 on October 13, 2009, which amended the Metro Plan to include forecasts of population growth for the years 2030 through 2035.
The majority of these new persons will live in congregate housing or assisted living quarters.

The share of population in group quarters may be affected by two trends: (1) growth in student population at the University of Oregon and (2) growth in retirees. Growth in the student population will be affected by change in enrollment growth at the University of Oregon and the University’s provision of dormitory space. The University projects growth of about 3,700 students over the 2009 to 2019 period (from 20,300 students in 2009)\(^{18}\) and plans to build an additional approximately 1,500 bed spaces over the 2007 to 2017 period.\(^{19}\)

The housing choice of retirees may also affect the share of population in group quarters. The State Office of Economic Analysis (OEA) projects that the share of population of people 60 years and older in Lane County will increase from 17% of the population in 2000 to 26% of the population in 2030.\(^{20}\) Seniors have a range of housing choices, from remaining in their current home, downsizing to a smaller home, moving to independent living situations, and nursing homes. Younger, independent seniors have a preference for aging in place or choose housing that allows them greater independence, such as age restricted communities.\(^{21}\) As seniors age or their health deteriorates, housing choices may include assisted living facilities and nursing homes. It is difficult to estimate how much the aging of the population and greater housing choice for seniors will affect the share of population in group quarters.

The trends described above suggest that population in group quarters may increase but does not provide a clear indication of how large that increase could be. For example, multiple factors could impact the University’s plans to build new dorms, including student housing preferences and availability of State funds to build new dormitories. Senior housing preferences could also affect growth in population in group quarters. While the senior population is growing, seniors are

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frequently choosing independent living situations, unless health factors require nursing care.

### Household size

OAR 660-024 established a safe harbor assumption for average household size—which is the figure from the most recent Census. According to the U.S. Census’ American Community Survey, Eugene’s household size in 2007 was 2.25 persons per household. Table C-15 shows historical trends in household size and demographic changes that may affect future average household size. **The baseline analysis assumes that Eugene will have an average household size of 2.25 persons per household for the 2011 to 2031 period.**

### Vacancy rate

Vacant units are the final variable in the basic housing need model. Vacancy rates are cyclical and represent the lag between demand and the market’s response to demand in additional dwelling units. Vacancy rates for rental and multiple family units are typically higher than those for owner-occupied and single-family dwelling units.

Table C-10 shows that the average vacancy rate for Eugene varies by time period. The Census reports that the vacancy rate in 1990 was 3.6%, 5.4% in 2000, and 6.3% in 2007.

<table>
<thead>
<tr>
<th></th>
<th>1990</th>
<th>2000</th>
<th>2007</th>
</tr>
</thead>
<tbody>
<tr>
<td>Housing Units</td>
<td>47,991</td>
<td>61,444</td>
<td>68,895</td>
</tr>
<tr>
<td>Occupied</td>
<td>46,274</td>
<td>58,110</td>
<td>64,575</td>
</tr>
<tr>
<td>Vacant</td>
<td>1,717</td>
<td>3,334</td>
<td>4,320</td>
</tr>
<tr>
<td>Vacancy Rate</td>
<td>3.6%</td>
<td>5.4%</td>
<td>6.3%</td>
</tr>
</tbody>
</table>

This data suggests that vacancy rates in Eugene have steadily increased over the 1990 to 2007 period. In reality, vacancy rates are cyclical and vary across the year. For examples, vacancy rates tend to be lower in September, at the start of the University of Oregon school year, and higher during the summer, when the University of Oregon is not in session.

Duncan and Brown, a Eugene real estate analysis firm, used to produce a report about housing rentals and vacancies in the Eugene Springfield region. Fall vacancy rates for apartments varied between about 0.5% to about 5.2% between 1990 and 2006. Vacancy rates in Eugene’s
neighborhoods also varied by year, with vacancy rates generally lower near the University and higher further away from the University.  

The baseline analysis assumes a 5% average vacancy rate in Eugene for the 2011 to 2031 period.

**Baseline forecast of new housing units, 2011-2031**

The preceding analysis leads to a baseline forecast of new housing units likely to be built in Eugene during the 2011 to 2031 period. Table C-11 show an estimate of needed housing in Eugene for the 2011 to 2031 period, based on recent data. The projection is based on the following assumptions:

- Population will increase by 33,900 people from 2011 to 2031, as forecast in Lane County’s adopted population forecast.
- About 5.5% percent of the new population or 1,865 people will locate in group quarters, based on the share of population in group quarters from the 2007 Census and the assumption that the share of population in group quarters will not change.
- The average household size will continue to be 2.25 people per household, based on information from the 2007 Census, a “safe harbor” assumption established in OAR 660-024-0040(7)(a).
- Vacancy rates for all housing types will be 5.0% based on recent vacancy rates in Eugene.
- The assumed mix of housing is 61% single-family housing types and 39% attached housing types. The assumed housing mix is based on long-term trends in the mix of Eugene’s housing. Single-family housing types have accounted for about 60% of Eugene’s housing stock since 1990. The mix of 61%/39% is based on the mix of housing in Eugene in 2007.

The baseline forecast of new housing uses the long-term mix of Eugene’s housing stock rather than the actual mix achieved over the 2001 to 2008 period for the following reasons:

- The achieved mix over the 2001 to 2008 period (69% single-family housing types and 31% attached housing types) was the result of an unusual housing market bubble, which is not likely to be repeated over the 20-year period.

---

Housing affordability is a problem in Eugene, with about 40% of Eugene’s households spending 30% or more of their income on housing. The achieved mix over the 2001 to 2008 period does not provide enough more affordable attached housing types to meet the need for more affordable housing.

Based on the assumptions shown in Table C-11, Eugene will need 14,951 new dwelling units to accommodate population growth between 2011 and 2031, not including new group quarters. The results indicate that Eugene will need to issue permits for 748 new dwelling units annually during the planning period. This figure represents a decrease over the 835 dwelling units approved annually during the 2001 to 2008 period and is substantially below the peak of 941 to 1,412 permits issued annually over the 2004 to 2006 period.

The forecast of new units does not include dwellings that will be demolished and replaced. This analysis does not factor those units in; it assumes they will be replaced at the same site and will not create additional demand for residential land.
Table C-11. Baseline forecast of demand for new housing units, Eugene, 2011-2031

<table>
<thead>
<tr>
<th>Variable</th>
<th>Estimate of Housing Units (2011-2031)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change in persons</td>
<td>33,900</td>
</tr>
<tr>
<td><em>minus</em> Change in persons in group quarters</td>
<td>1,865</td>
</tr>
<tr>
<td><em>equals</em> Persons in households</td>
<td>32,036</td>
</tr>
<tr>
<td>Average household size</td>
<td>2.25</td>
</tr>
<tr>
<td>New occupied DU</td>
<td>14,239</td>
</tr>
<tr>
<td><em>times</em> Aggregate vacancy rate</td>
<td>5%</td>
</tr>
<tr>
<td><em>equals</em> Vacant dwelling units</td>
<td>712</td>
</tr>
<tr>
<td><strong>Total new dwelling units (2011-2031)</strong></td>
<td>14,951</td>
</tr>
<tr>
<td>Dwelling units by structure type</td>
<td></td>
</tr>
<tr>
<td>Single-family detached</td>
<td></td>
</tr>
<tr>
<td>Percent single-family detached DU</td>
<td>61%</td>
</tr>
<tr>
<td><em>equals</em> Total new single-family DU</td>
<td>9,120</td>
</tr>
<tr>
<td>Single-family attached</td>
<td></td>
</tr>
<tr>
<td>Percent single-family attached DU</td>
<td>7%</td>
</tr>
<tr>
<td><strong>Total new single-family attached DU</strong></td>
<td>1,047</td>
</tr>
<tr>
<td>Two to four units</td>
<td></td>
</tr>
<tr>
<td>Percent apartment DU</td>
<td>10%</td>
</tr>
<tr>
<td><strong>Total new two to four DU</strong></td>
<td>1,495</td>
</tr>
<tr>
<td>Five or more units</td>
<td></td>
</tr>
<tr>
<td>Percent apartment DU</td>
<td>22%</td>
</tr>
<tr>
<td><strong>Total new five or more DU</strong></td>
<td>3,289</td>
</tr>
<tr>
<td><strong>Totals</strong></td>
<td><strong>Total new dwelling units (2011-2031)</strong></td>
</tr>
<tr>
<td><em>equals</em> Dwelling units needed annually</td>
<td>748</td>
</tr>
</tbody>
</table>

Source: Calculations by ECONorthwest based on Eugene’s adopted population forecast and US Census data.

The baseline forecast of demand for new housing units in Table C-11 is a baseline forecast, based on recent data. In 2010, the City of Eugene will consider policy changes (e.g., land use efficiency measures) that may affect the forecast for housing, especially assumptions related to the mix of housing. The baseline forecast may be revised based on further analysis and policy changes.

Some of the 14,951 dwelling units shown in Table C-11 will not require new land because they will locate on land that is currently developed. Section C.3 discussed recent redevelopment over the 2001 to 2008 period. Table C-8 identified 527 new dwellings that were constructed on lots with existing dwellings between 2001 and 2008. These dwellings accounted for about 8% of the 6,532 dwelling units built over the eight year period.

The baseline forecast assumes that the redevelopment rate will be the same as the recent rate and will remain stable over the 20 year planning period. Table C-12 presents the baseline forecast of dwelling units that...
will require new land in Eugene. Table C-12 assumes a redevelopment rate of 8% for all types of dwelling units. The result is that 1,197 dwellings will locate on land with existing development and that Eugene will need to provide land for 13,754 new dwelling units.

Table C-12. Baseline forecast of dwelling units that will require new land, Eugene, 2011-2031

<table>
<thead>
<tr>
<th>Structure Type</th>
<th>Estimate of DU (2011-2031)</th>
<th>Redevelopment Rate</th>
<th>Number of DU from Redevelopment</th>
<th>DU Requiring New Residential Land (2011-2031)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single-family detached</td>
<td>9,120</td>
<td>8%</td>
<td>730</td>
<td>8,390</td>
</tr>
<tr>
<td>Single-family attached</td>
<td>1,047</td>
<td>8%</td>
<td>84</td>
<td>963</td>
</tr>
<tr>
<td>Two to four units</td>
<td>1,495</td>
<td>8%</td>
<td>120</td>
<td>1,375</td>
</tr>
<tr>
<td>Five or more units</td>
<td>3,289</td>
<td>8%</td>
<td>263</td>
<td>3,026</td>
</tr>
<tr>
<td><strong>Total dwelling units</strong></td>
<td><strong>14,951</strong></td>
<td></td>
<td><strong>1,197</strong></td>
<td><strong>13,754</strong></td>
</tr>
</tbody>
</table>

Source: Calculations and analysis by ECONorthwest based on the forecast of needed housing and LCOG taxlot and address data
C.4.2 **STEP 2: IDENTIFY RELEVANT NATIONAL, STATE, AND LOCAL DEMOGRAPHIC AND ECONOMIC TRENDS AND FACTORS THAT MAY AFFECT THE 20-YEAR PROJECTION OF STRUCTURE TYPE MIX**

**National Housing Trends**

The overview of national, state, and local housing trends builds from previous work by ECO and conclusions from The *State of the Nation’s Housing, 2009* report from the Joint Center for Housing Studies of Harvard University. The Harvard report summarizes the national housing outlook for the next decade as follows:

“Despite unprecedented federal efforts to jumpstart the economy and help homeowners keep up with their mortgage payments, home prices continued to fall and foreclosures continued to mount in most areas through the first quarter of 2009. While new and existing home sales and single-family starts have shown some signs of stabilizing, ongoing job losses, house price deflation, and tighter mortgage credit are placing any recovery at risk.

“In the worst housing construction cycle since the 1940s, depressed demand is making it difficult for the market to work off excess vacant units. Restoring demand to more normal levels will take time since so many owners are in financial distress or trapped in homes worth less than their mortgages. The recession has also dampened both immigration and new household formation. But once new home sales rebound and the economy begins to pick up, the aging of the echo boomers—the largest generation to reach adulthood in the nation’s history—should reinvigorate the housing market.”

This evaluation presents a bleak outlook for housing markets and for homeownership in the short-term brought on by the subprime mortgage crisis. However, the image painted of the future looks brighter, as the increase in housing demand is naturally induced by the growth of the population in the necessary age groups.
Long run trends in home ownership and demand

During 2008, there was a continuation of the significant departure from the recent housing boom that had lasted for 13 consecutive years (1992-2005). While strength in early 2005 pushed most national housing indicators into record territory, the market began to soften and sales slowed in many areas in the latter half of 2005. By 2006, higher prices and rising interest rates had a negative impact on market demand. Investor demand, home sales and single-family starts dropped sharply. Growth in national sales prices also slowed. By 2007 and early 2008, housing market problems had reached the rest of the economy, resulting in a nationwide economic slowdown and fear of recession. After 13 successive years of increases, the national homeownership rate slipped in each year from 2005 to 2008, and is currently at 67.8%.

The Joint Center for Housing Studies concludes that the cooling housing market in 2006 had an immediate impact on homeownership. Increasing interest rates and decreasing housing affordability contributed to the recent market correction. Homebuilders could not react quickly enough to changing market conditions, resulting in an oversupply of housing and a rising inventory of unsold homes. The Joint Center for Housing Studies predicts that once the corrections made to work off the housing oversupply and prices start to recover, a return to traditional mortgage products and the strength of natural demand will invigorate the homeownership rate. The long-term market outlook shows that homeownership is still the preferred tenure. Over the next decade, 88% of net household growth is expected to come from gains in the number of homeowners. While further homeownership gains are likely during this decade, they are not assured. Additional increases depend, in part, on finding ways to ease the difficulties faced by low and moderate income households in purchasing a home. It also rests on whether the conditions that have led to homeownership growth can be sustained.

From 2000 to 2005 housing starts and manufactured home placements appeared to have been roughly in line with household demand. In 2005, with demand for homes falling but construction coming off record levels, the surplus of both new and existing homes was much higher than in recent years. In late 2007 and early 2008, the excess supply of new single-family homes retreated by about 12%, though the simultaneous drop in sales left the supply at 11 months, a figure not seen since the 1970s. This resulted in a strong buyer’s market, leaving many homes lingering on the market and forcing many sellers to accept prices lower than what they were expecting. The Joint Center for Housing Studies predicts the oversupply will eventually balance as housing starts continue to fall, lower prices motivate unforeseen buyers, and the rest of the economy...
begins to recover. Housing starts fell below one million in 2008, compared to 1.5 million in 2007, 1.9 million in 2006, and 2.2 million in 2005.

The Joint Center for Housing Studies indicates that demand for new homes could total as many as 14.4 million units nationally between 2010 and 2020. Nationally, the vast majority of these homes will be built in lower-density areas where cheaper land is in greater supply. People and jobs have been moving away from central business districts (CBDs) for more than a century: the number of the country’s largest metropolitan areas with more than half of their households living at least 10 miles from the CBD has more than tripled from 13 in 1970 to 46 in 2000; in six metropolitan areas more than a fifth of households live at least 30 miles out. While people older than 45 years are generally continuing to move away from CBDs, younger people have begun to move nearer to CBDs.

The Joint Center for Housing Studies also indicates that demand for higher density housing types exists among certain demographics. They conclude that because of persistent income disparities, as well as the movement of the echo boomers into young adulthood, housing demand may shift away from single-family detached homes toward more affordable multifamily apartments, town homes, and manufactured homes. Supply-side considerations, however, outweigh these demographic forces.

Home foreclosures are currently a problem in the national housing market, especially for subprime loans. In 2008, 4.1% of subprime loans entered foreclosure compared to the previous high of 2.3% in 2001. In the prime mortgage market, the share of loans entering foreclosure more than tripled from 2006 to 2008. Over 3 million home loans had two or more payments past due in the United States in 2008 compared to just over 1 million in 2004. About 6.6 million foreclosures have been initiated since 2007 and up to 12 million more foreclosures are projected to occur between the fourth quarter of 2008 through 2012.  

Recent trends in home ownership and demand

Conditions that had previously bolstered the housing market and promoted homeownership weakened in 2005 and eroded further in 2006 and 2007. Increasing interest rates and weakening housing prices combined to slow the housing market. In 2007, new home sales were down 40% from the record 2005 level, and existing home sales were down 20%. Figures C-5 and C-6 shows that, using housing permits issued as a proxy for new home ownership, Lane County’s issued housing permits fell between 25% and 50% between 2005 and 2007.

![Figure C-5. Change in housing permits issued by county, U.S., 2005-2007](image)


Demographic trends in home ownership

According to the Joint Center for Housing Studies, immigration will play a key role in accelerating household growth over the next 10 years. Between 2000 and 2006, immigrants contributed to over 60% of household growth. Minorities will account for 68% of the 14.6 million projected growth in households for the 2005 to 2015 period. Immigrants now comprise a growing share of young adults and children in the United States. Twenty percent of Americans ages 25-34 are foreign born, and an additional 9% are second generation Americans. Members of this generation will probably earn more than their parents becoming an even greater source of housing demand in the coming decades.
The Joint Center for Housing Studies suggests that an aging population, and of baby boomers in particular, will drive changes in the age distribution of households in all age groups over 55 years. A recent survey of baby boomers showed that more than a quarter plan to relocate into larger homes and 5% plan to move to smaller homes. Second home demand among upper-income homebuyers of all ages also continues to grow. Households aged 50 to 69 are expected to account for the purchase of nearly half a million second homes between 2005 and 2015.

People prefer to remain in their community as they age.\textsuperscript{24} The challenges that seniors face as they age in continuing to live in their community include: changes in healthcare needs, loss of mobility, the difficulty of home maintenance, financial concerns, and increases in property taxes.\textsuperscript{25} Not all of these issues can be addressed through housing or land-use policies. Communities can address some of these issues through adopting policies that:

- Diversify housing stock to allow development of smaller, comparatively easily maintained houses in single-family zones, such as single story townhouses, condominiums, and apartments.
- Allow commercial uses in residential zones, such as neighborhood markets.
- Allow a mixture of housing densities and structure types in single-family zones, such as single-family detached, single-family attached, condominiums, and apartments.
- Promote the development of group housing for seniors that are unable or choose not to continue living in a private house. These facilities could include retirement communities for active seniors, assisted living facilities, or nursing homes.
- Design public facilities so that they can be used by seniors with limited mobility. For example, design and maintain sidewalks so that they can be used by people in wheel chairs or using walkers.

\textsuperscript{24} A survey conducted by the AARP indicates that 90\% of people 50 years and older want to stay in their current home and community as they age. See \url{http://www.aarp.org/research}.

\textsuperscript{25} “Aging in Place: A toolkit for Local Governments” by M. Scott Ball.
Home rental trends

Nationally, the rental market continues to experience growth, adding 2 million rental households from 2004 to 2007. Demand strengthened in every region except the Northeast. Vacancy rates in the West continue to decline, leading to strong increases in rental rates. Over the longer term, the Joint Center for Housing studies expects rental housing demand to grow by 1.8 million households over the next decade. Minorities will be responsible for nearly all of this increased demand. The minority share of renter households grew from 37% in 1995 to 43% in 2005. The minority share is forecast to exceed 50% of renter households in 2015. Demographics will also play a role. Growth in young adult households will increase demand for moderately priced rentals, in part because echo boomers will reach their mid-20s after 2010. Meanwhile growth among those between the ages of 45 and 64 will lift demand for higher-end rentals. Given current trends in home prices and interest rates, conditions will become increasingly favorable for rental markets in the coming years.

Despite only modest increases in rents in recent years, growing shares of low- and moderate-wage workers, as well as seniors with fixed incomes, can no longer afford to rent even a modest two-bedroom apartment anywhere in the country. In 2006, one in three American households spent more than 30% of income on housing, and more than one in seven spent upwards of 50%. The national trend towards increased rent to income ratios is mirrored regionally in that a salary of two to three times the 2007 Federal minimum wage of $5.85 is needed to afford rents in Lane County (see Figure C-7).

According to the Joint Center for Housing Studies, these statistics understate the true magnitude of the affordability problem because they do not capture the tradeoffs people make to hold down their housing costs. For example, these figures exclude the 2.5 million households that live in crowded or structurally inadequate housing units. They also exclude the growing number of households that move to locations distant from work where they can afford to pay for housing, but must spend more for transportation to work. Among households in the lowest expenditure quartile, those living in affordable housing spend an average of $100 more on transportation per month than those who are severely housing cost-burdened. With total average monthly outlays of only $1,000, these extra travel costs amount to 10 percent of the entire household budget.
Trends in housing affordability

Despite widespread falling house prices, affordability problems have not improved significantly. A median-priced single-family home under conventional terms in 2007 (10% down payment and 30-year fixed rate loan) only costs $76 per month and $1,000 down payment less than a house bought in 2006, the year in which the sales prices of single-family homes were at their highest real price in history. Only 17 of the 138 National Association of Realtors-covered metropolitan areas have lower costs in 2007 than they did in 2003 when interest rates were bottomed out.

With low-wage jobs increasing and wages for those jobs stagnating, affordability problems will persist even as strong fundamentals lift the trajectory of residential investment. The number of severely cost-burdened households (spending more than 50% of income on housing) increased by almost 4 million households from 2001 to 2006, to a total of nearly 18 million households in 2005. Nearly 40% of low-income households with one or more full-time workers are severely cost burdened, and nearly 60% of low-income households with one part-time worker are severely cost burdened. The Joint Center for Housing Studies points to widening income disparities and decreasing federal assistance as
two factors exacerbating the lack of affordable housing. While the Harvard report presents a relatively optimistic long-run outlook for housing markets and for homeownership, it points to the significant difficulties low- and moderate-income households face in finding affordable housing, and preserving the affordable units that do exist.

**Trends in Housing Characteristics**

The U.S Bureau of Census Characteristics of New Housing Report presents data that show trends in the characteristics of new housing for the nation, state, and local areas. Several trends in the characteristics of housing are evident from the New Housing Report:

- Larger single-family units on smaller lots. Between 1998 and 2008 the median size of new single-family dwellings increased 11%, from 2,000 sq. ft. to 2,219 sq. ft. nationally and 11% in the western region from 1,985 sq. ft. to 2,213 sq. ft. Moreover, the percentage of units under 1,400 sq. ft. nationally decreased from 15% in 1999 to 13% in 2008. The percentage of units greater than 3,000 sq. ft. increased from 17% in 1999 to 25% of new one-family homes completed in 2008. In addition to larger homes, a move towards smaller lot sizes is seen nationally. Between 1994 and 2008 the percentage of lots under 7,000 sq. ft. increased from 29% of lots to 34% of lots.

- Larger multifamily units. Between 1999 and 2008, the median size of new multiple family dwelling units increased by 8%. The percentage of multifamily units with more than 1,200 sq. ft. increased from 26% to 45% in the western region and from 28% to 42% nationally.

- More household amenities. Between 1994 and 2007 the percentage of single-family units built with amenities such as central air conditioning, fireplaces, 2 or more car garages, or 2 or more baths all increased. The same trend in increased amenities is seen in multiple family units.

A clear linkage exists between demographic characteristics and housing choice. This is more typically referred to as the linkage between life-cycle and housing choice and is documented in detail in several publications. Analysis of data from the Public Use Microsample (PUMS) in the 2000 Census helps to describe the relationship between selected demographic characteristics and housing choice. Key relationships identified through this data include:

- Homeownership rates increase as income increases;
- Homeownership rates increase as age increases;
• Choice of single-family detached housing types increases as income increases;
• Renters are much more likely to choose multiple family housing types than single-family; and
• Income is a stronger determinate of tenure and housing type choice for all age categories.

C.4.3  **STEP 3: DESCRIBE THE DEMOGRAPHIC CHARACTERISTICS OF THE POPULATION AND, IF POSSIBLE, HOUSING TRENDS THAT RELATE TO DEMAND FOR DIFFERENT TYPES OF HOUSING**

State and regional demographic and housing trends are important to a thorough understanding of the dynamics of the Eugene housing market. Eugene exists in a regional economy; trends in the region impact the local housing market. This section documents state and regional demographic and housing trends relevant to Eugene.

This section reviews historical demographic trends in Lane County and Eugene. Demographic trends provide a broader context for growth in a region; factors such as age, income, migration and other trends show how communities have grown and shape future growth. To provide context, we compare Eugene with Lane County and Oregon where appropriate. Characteristics such as age and ethnicity are indicators of how population has grown in the past and provide insight into factors that may affect future growth.
State Demographic Trends

Oregon’s 2006-2010 Consolidated Plan includes a detailed housing needs analysis as well as strategies for addressing housing needs statewide. The plan concludes that “Oregon’s changing population demographics are having a significant impact on its housing market.” It identified the following population and demographic trends that influence housing need statewide. Oregon is...

- 11th fastest growing in the United States
- Facing dramatic housing cost increases
- Facing median and adjusted incomes less than those of 1999
- Increasingly older, more diverse, and, less affluent

Richard Bjelland, State Housing Analyst at the Housing and Community Services Department of the State of Oregon, analyzed recent demographic changes taking place in Oregon and discussed their implications in a 2006 presentation “Changing Demographics: Impacts to Oregon and the US.” Some of Bjelland’s most significant findings are summarized below:

- Oregon’s minority population is growing quickly. Minorities made up 9.2% of the population in 1990 and 16.5% of the population in 2000, a 52% increase.

- Hispanics and Latinos make up a large share of that population and their growth rate is higher than non-Hispanics/Latinos. The growth rate of Oregon’s non-Hispanic/Latino population between 1990 and 2000 was 15.3% compared to 144.3% for Hispanics and Latinos.

- Hispanic/Latino residents of Oregon become homeowners at younger ages than non-Hispanic/Latino residents. Table C-13 shows that a higher rate of Hispanic/Latino homeowners in Oregon are under the age of 45 compared to non Hispanic/Latino householders.

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26 http://www.ohcs.oregon.gov/OHCS/HRS_Consolidated_Plan_5yearplan.shtml

Table C-13. Oregon homeownership distribution by age of householder, 2007

<table>
<thead>
<tr>
<th>Age of Householder</th>
<th>Hispanic/Latino</th>
<th>Non Hispanic/Latino</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under 25 years</td>
<td>7%</td>
<td>5%</td>
</tr>
<tr>
<td>25 to 44 years</td>
<td>65%</td>
<td>33%</td>
</tr>
<tr>
<td>45 to 64 years</td>
<td>23%</td>
<td>40%</td>
</tr>
<tr>
<td>65 years and older</td>
<td>5%</td>
<td>22%</td>
</tr>
</tbody>
</table>

Source: American Community Survey 2007 B19037I
Regional and Local Demographic Trends

Regional demographic trends largely follow the statewide trends discussed above, but provide additional insight into how demographic trends might affect housing in Eugene. Demographic trends that might affect the key assumptions used in the baseline analysis of housing need are: (1) the aging population, (2) changes in household size and composition, and (3) increases in diversity. This section describes those trends.

Aging population

Figure C-8 shows the populations of Oregon, Lane County, and Eugene by age for 2007. Eugene has a greater proportion of its population aged 20-29 years than the County or State averages. Eugene has comparatively fewer residents between 50 and 69 years than the state. Eugene’s age distribution affects housing need, as described later in this section.

Figure C-8. Population distribution by age, Oregon, Lane County, and Eugene, 2007

![Population distribution by age](chart)

Source: American Community Survey 2007 B01001

Twenty-eight percent of Eugene households have one or more people under the age of 18. Nearby cities generally have a larger percentage of households with one or more people under the age of 18, including Springfield (38%), Coburg (40%), Cottage Grove (36%), Creswell (45%), Junction City (37%), and Veneta (48%).
In 2007, 13% of Eugene residents were over the age of 65. Outlying communities with the largest percent of persons 65 and over from the 2000 Census were: Oakridge (21%) and Cottage Grove (15%). The community with the smallest percent of persons 65 and older was Veneta (9%). These data indicate that some outlying communities trend toward older populations, others trend towards younger populations with families with younger children.

Table C-14 shows population by age for Eugene for 2000 and 2007. The data show that Eugene grew by 15,719 people between 2000 and 2007, which is an 11% increase. The age breakdown shows that Eugene had an increase in population for every age group over the age of 17. The fastest growing age groups were aged 45 to 64 years and 65 and over, consistent with County and State trends. The group with negative growth was ages 5 to 17.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Number</td>
<td>Percent</td>
<td>Number</td>
</tr>
<tr>
<td>Under 5</td>
<td>7,367</td>
<td>5%</td>
<td>7,430</td>
</tr>
<tr>
<td>5-17</td>
<td>20,686</td>
<td>15%</td>
<td>20,271</td>
</tr>
<tr>
<td>18-24</td>
<td>23,868</td>
<td>17%</td>
<td>24,513</td>
</tr>
<tr>
<td>25-44</td>
<td>39,247</td>
<td>28%</td>
<td>44,186</td>
</tr>
<tr>
<td>45-64</td>
<td>30,068</td>
<td>22%</td>
<td>36,801</td>
</tr>
<tr>
<td>65 and over</td>
<td>16,657</td>
<td>12%</td>
<td>20,411</td>
</tr>
<tr>
<td>Total</td>
<td>137,893</td>
<td>100%</td>
<td>153,612</td>
</tr>
</tbody>
</table>

Source: U.S. Census 2000 P12, American Community Survey 2007 B01001

The data in Table C-14 suggests that Eugene’s population is aging and that the City is attracting older people and with growth concentrated in people 45 years and older. This trend is consistent with County and State trends.

The age distribution in Figure C-8 shows a higher percentage of young adults (20-29) live in Eugene than in Lane County, indicating that Eugene’s population and age trends are somewhat different from the projections for the county as a whole. This difference can be explained by the presence of the University of Oregon. The change in the age distribution of Eugene’s population, however, is consistent with County and State trends. The 45-64 age group grew by 26% statewide, by 19% in the County, and by 22% in Eugene between 2000 and 2008, with the largest increase in population than any other age group in each geography.

Figure C-9 shows the Office of Economic Analysis’s (OEA) forecast of population by age group for 2000 to 2030 for Lane County. The OEA
forecasts that Lane County will experience growth in all age groups. The share of population in people 60 years and older is forecast to increased from 17% of the population in 2000 to 26% of the population in 2030. The share of population 29 years and younger is forecast to decrease from 42% in 2000 to 36% in 2030.

Figure C-9. Change in population distribution by age, Lane County, 2000-2030

Household size and composition

Household size

The average household size has decreased statewide over the past five decades. The average household size in Oregon was 2.60 in 1980, 2.52 in 1990, 2.51 in 2000 and 2.49 in 2007. One and two person households made up the majority of Oregon households in 1990. The direct impact of decreasing household size on housing demand is that smaller households means more households, which means a need for more housing units even if population were not growing.

Table C-15 shows average household size in Oregon, Lane County, and Eugene for 2000 and 2007. Table C-15 shows that the 2000 Census estimated that Eugene had 2.27 persons per household. The 2007
American Community Survey estimated that household size decreased to 2.25 persons per household. This decrease in household size (by about 0.02 persons per household) is consistent with County and State trends.

Table C-15. Average household size, Oregon, Lane County, and Eugene, 2000 and 2007

<table>
<thead>
<tr>
<th></th>
<th>Oregon</th>
<th>Lane County</th>
<th>Eugene</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Average household size</td>
<td>2.51</td>
<td>2.42</td>
<td>2.27</td>
</tr>
<tr>
<td>Owner-occupied units</td>
<td>2.59</td>
<td>2.52</td>
<td>2.47</td>
</tr>
<tr>
<td>Renter-occupied units</td>
<td>2.36</td>
<td>2.25</td>
<td>2.05</td>
</tr>
<tr>
<td>2007</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Average household size</td>
<td>2.49</td>
<td>2.41</td>
<td>2.25</td>
</tr>
<tr>
<td>Owner-occupied units</td>
<td>2.6</td>
<td>2.58</td>
<td>2.53</td>
</tr>
<tr>
<td>Renter-occupied units</td>
<td>2.3</td>
<td>2.13</td>
<td>1.93</td>
</tr>
</tbody>
</table>

Source: U.S. Census 2000 H12, American Community Survey 2007 B25010

The historical change in household size in Eugene over the last quarter-century is a relatively slow decrease: from 1980 to 2007 the average annual rate of decrease was on the order of 0.01% per year. If Eugene’s household size continues to decrease, Eugene will need more dwelling units than the current forecast projects to accommodate Eugene’s expected population growth.

Several trends may affect household future household size in Eugene:

- **Student housing preference.** Students at the University of Oregon accounted for about 13% of Eugene’s population in 2008. Student housing preferences can have an important impact on demand for housing in Eugene. Recent trends in student housing is development of dwelling units with five or more bedrooms and shared common space and kitchen facilities. These dwellings are most common in neighborhoods near the University and may have five or more students living in them. While it seems that the market for this type of housing is limited by student housing demand and student housing preferences, continued growth in this type of housing could increase average household size slightly across the City.

- **Aging of the population.** The following section describes the relationship between age and household size. In short, householders 45 years and older are more likely to live in single-person households than householders younger than 45 years. The OEA forecasts the greatest growth in people 60 years and older in Lane County over the next 20 years. The implication is that
household size may decrease as a result of the aging of the population.

Table C-16 shows household size in Oregon, Lane County, and Eugene for 1990, 2000, and 2007. The share of one-person households in Eugene increased from 31% in 1990 to 34% in 2007, consistent with State and County trends. The share of three-person households in Eugene decreased from 34% to 29% in Eugene, consistent with State and County trends. These changes are consistent with the decrease in average household size shown in Table C-15.

Table C-16. Household size, Oregon, Lane County, and Eugene, 1990, 2000, and 2007

<table>
<thead>
<tr>
<th>Number of Persons in Household</th>
<th>Oregon</th>
<th>Lane County</th>
<th>Eugene</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Number</td>
<td>Percent</td>
<td>Number</td>
</tr>
<tr>
<td>1990</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1-person</td>
<td>277,631</td>
<td>25%</td>
<td>27,739</td>
</tr>
<tr>
<td>2-persons</td>
<td>393,755</td>
<td>36%</td>
<td>40,336</td>
</tr>
<tr>
<td>3 or more</td>
<td>433,976</td>
<td>39%</td>
<td>42,865</td>
</tr>
<tr>
<td>Total</td>
<td>1,105,362</td>
<td>100%</td>
<td>110,940</td>
</tr>
<tr>
<td>2000</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1-person</td>
<td>347,547</td>
<td>26%</td>
<td>34,743</td>
</tr>
<tr>
<td>2-persons</td>
<td>477,561</td>
<td>36%</td>
<td>48,614</td>
</tr>
<tr>
<td>3 or more</td>
<td>510,001</td>
<td>38%</td>
<td>47,259</td>
</tr>
<tr>
<td>Total</td>
<td>1,335,109</td>
<td>100%</td>
<td>130,616</td>
</tr>
<tr>
<td>2007</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1-person</td>
<td>414,031</td>
<td>28%</td>
<td>38,648</td>
</tr>
<tr>
<td>2-persons</td>
<td>533,888</td>
<td>36%</td>
<td>54,804</td>
</tr>
<tr>
<td>3 or more</td>
<td>524,046</td>
<td>36%</td>
<td>44,922</td>
</tr>
<tr>
<td>Total</td>
<td>1,471,965</td>
<td>100%</td>
<td>138,374</td>
</tr>
</tbody>
</table>


Household composition

Table C-17 shows household composition in Oregon, Lane County, and Eugene. In 2007, 24% of Eugene’s households had children, compared with 27% of Lane County’s households and 29% of Oregon’s households. Eugene had a smaller share of households with married couples (40%), with and without children, than the State (50%) or County (58%). Eugene had a larger share of non-family households (48%) than the County average (39%) or State average (36%).
Housing needs change throughout a person’s life, with changes in income, family composition, and age. The types of housing needed by a 20 year old college student are different than the needs of a 40 year old parent with children or an 80 year old single-person. Figures C-10 through C-12 show characteristics of households by household size and by age of householder for Eugene.

Figure C-10 shows households by household size and age of householder in Eugene in 2000. Householders 25 to 54 are most likely to be in households with two or more people. Householders 55 years and older are more likely to live in single-person households. More than half of householders 75 years and older live in single-person households.

Figure C-10. Households by household size and age of householder, Eugene, 2000

Source: U.S. Census 2000 SF3 HCT2
Figure C-11 shows households by tenure and age of householder in Eugene in 2000. Eugene had more owner-occupied units (52% of total) than renter-occupied households (48%). More than half of householders aged 35 and older were homeowners. Homeownership increases with age, until age 55. After age 75, homeownership decreases.

**Figure C-11. Households by tenure and age of householder, Eugene, 2000**

Source: U.S. Census 2000 SF3 HCT2

Figure C-12 shows households by tenure, size, and age of householder in Eugene in 2000. Figure C-12 shows that:

- Householders 44 years and younger were more likely to have households with 2 or more persons.
- Householders between 35 and 74 years were more likely to be homeowners.
- Householders 55 years and older were more likely to be homeowners in single-person households.
- Householders younger than 34 years and older than 75 years were more likely to be renters in single-person households.
Since 2000, the trends displayed in Figures C-10 through C-12 have not considerably changed. Two or more person, renter-occupied households have increased their share of Eugene households by 3%, with much of the growth shown in age groups under the age of 54.\textsuperscript{28}

\textsuperscript{28} Data from the 2007 American Community survey were less specific with regard to age than data from the 2000 Census.
**Increased ethnic diversity**

Eugene has grown more ethnically diverse since 1990. Table C-18 shows the number of persons of Hispanic or Latino origin for Oregon, Lane County, and Eugene for 1990, 2000, and 2007. In 2007, Eugene’s population was 7.1% Hispanic/Latino, compared with 6.5% of residents of Lane County and 10.6% of residents of Oregon.

The Hispanic/Latino population grew faster in Eugene than in Lane County or Oregon from 1990 to 2007. Eugene’s Hispanic/Latino population grew by 259% between 1990 and 2007. During the same period, Lane County’s Hispanic/Latino population grew by 206% and Oregon’s Hispanic/Latino population grew by 251%.

**Table C-18. Persons of Hispanic or Latino origin, Oregon, Lane County, and Eugene, 1990, 2000, and 2007**

<table>
<thead>
<tr>
<th></th>
<th>Oregon</th>
<th>Lane County</th>
<th>Eugene</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1990</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Population</td>
<td>2,842,321</td>
<td>282,912</td>
<td>112,669</td>
</tr>
<tr>
<td>Hispanic or Latino</td>
<td>112,707</td>
<td>6,852</td>
<td>3,051</td>
</tr>
<tr>
<td>Percent Hispanic or Latino</td>
<td>4.0%</td>
<td>2.4%</td>
<td>2.7%</td>
</tr>
<tr>
<td><strong>2000</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Population</td>
<td>3,421,399</td>
<td>322,959</td>
<td>137,893</td>
</tr>
<tr>
<td>Hispanic or Latino</td>
<td>275,314</td>
<td>14,874</td>
<td>6,843</td>
</tr>
<tr>
<td>Percent Hispanic or Latino</td>
<td>8.0%</td>
<td>4.6%</td>
<td>5.0%</td>
</tr>
<tr>
<td><strong>2007</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Population</td>
<td>3,747,455</td>
<td>343,591</td>
<td>153,612</td>
</tr>
<tr>
<td>Hispanic or Latino</td>
<td>396,145</td>
<td>20,992</td>
<td>10,953</td>
</tr>
<tr>
<td>Percent Hispanic or Latino</td>
<td>10.6%</td>
<td>6.1%</td>
<td>7.1%</td>
</tr>
<tr>
<td><strong>Change 1990 to 2007</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hispanic or Latino</td>
<td>283,438</td>
<td>14,140</td>
<td>7,902</td>
</tr>
<tr>
<td>Percent Hispanic or Latino</td>
<td>251%</td>
<td>206%</td>
<td>259%</td>
</tr>
</tbody>
</table>


Other smaller communities near Eugene experienced triple-digit growth in Hispanic/ Latino populations between 1990 and 2000. The communities experiencing the largest increase in the Hispanic/ Latino populations were Springfield (2,352 people), Junction City (318 people), Cottage Grove (255 people), and Creswell (142 people).
Regional and local housing development trends

The majority of housing development in the region occurs in Eugene and Springfield. Table C-19 shows the total number of permitted dwellings (single-family and multi-family) by year for selected Lane County cities between 2000 and 2008. Table C-19 shows that Eugene had nearly two-thirds of permitted units in the region in 2008, with Springfield accounting for about one-fifth of permits. The number of permits issued peaked in 2004 and 2005, with more than 1,300 permits issued during those years. The number of permits issued in 2008 decreased to about 500 permits.

<table>
<thead>
<tr>
<th>City</th>
<th>2000</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>Permits</th>
<th>% Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eugene</td>
<td>744</td>
<td>760</td>
<td>828</td>
<td>611</td>
<td>876</td>
<td>1,327</td>
<td>731</td>
<td>555</td>
<td>270</td>
<td>6,702</td>
<td>62%</td>
</tr>
<tr>
<td>Springfield</td>
<td>274</td>
<td>272</td>
<td>290</td>
<td>324</td>
<td>164</td>
<td>231</td>
<td>211</td>
<td>265</td>
<td>167</td>
<td>2,198</td>
<td>20%</td>
</tr>
<tr>
<td>Junction City</td>
<td>15</td>
<td>12</td>
<td>12</td>
<td>13</td>
<td>10</td>
<td>13</td>
<td>8</td>
<td>78</td>
<td>47</td>
<td>208</td>
<td>2%</td>
</tr>
<tr>
<td>Oakridge</td>
<td>1</td>
<td>4</td>
<td>1</td>
<td>0</td>
<td>8</td>
<td>4</td>
<td>9</td>
<td>13</td>
<td>19</td>
<td>59</td>
<td>1%</td>
</tr>
<tr>
<td>Creswell</td>
<td>26</td>
<td>67</td>
<td>82</td>
<td>93</td>
<td>153</td>
<td>62</td>
<td>56</td>
<td>84</td>
<td>17</td>
<td>640</td>
<td>6%</td>
</tr>
<tr>
<td>Cottage Grove</td>
<td>29</td>
<td>17</td>
<td>28</td>
<td>68</td>
<td>44</td>
<td>86</td>
<td>53</td>
<td>32</td>
<td>13</td>
<td>370</td>
<td>3%</td>
</tr>
<tr>
<td>Veneta</td>
<td>11</td>
<td>24</td>
<td>43</td>
<td>96</td>
<td>112</td>
<td>117</td>
<td>128</td>
<td>62</td>
<td>0</td>
<td>593</td>
<td>6%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>1,100</td>
<td>1,156</td>
<td>1,284</td>
<td>1,205</td>
<td>1,367</td>
<td>1,840</td>
<td>1,196</td>
<td>1,089</td>
<td>533</td>
<td>10,770</td>
<td>100%</td>
</tr>
</tbody>
</table>


Table C-20 shows the permits issued for both new single-family and new multifamily dwellings in selected Lane County cities between 2000 and 2008. Table C-20 shows that Eugene’s number of permits issued for single-family dwellings remained between 528 and 756 between 2000 and 2006, but fell to 297 in 2007 and fell again to 181 in 2008.

Eugene consistently issues permits for the most multi-family units among the cities shown, whereas Coburg and Veneta did not issue permits for multifamily units over the period. Eugene issued over 200 multifamily permits each year between 2003 and 2007, but issued only 89 in 2008. The share of multifamily permits issued in Eugene ranged from 9% of permits issued in 2003 to 46% of permits issued in 2007.
Table C-20. Total permitted single-family and multifamily dwellings by year, selected Lane County cities, 2000-2008

<table>
<thead>
<tr>
<th>City</th>
<th>2000</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>Total</th>
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<tbody>
<tr>
<td>Eugene</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>4,829</td>
<td>44%</td>
</tr>
<tr>
<td>Single family</td>
<td>619</td>
<td>633</td>
<td>673</td>
<td>559</td>
<td>583</td>
<td>756</td>
<td>528</td>
<td>297</td>
<td>181</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Multifamily</td>
<td>125</td>
<td>127</td>
<td>155</td>
<td>52</td>
<td>293</td>
<td>571</td>
<td>203</td>
<td>258</td>
<td>89</td>
<td>1,873</td>
<td>17%</td>
</tr>
<tr>
<td>Springfield</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1,554</td>
<td>14%</td>
</tr>
<tr>
<td>Single family</td>
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<td>225</td>
<td>243</td>
<td>128</td>
<td>98</td>
<td>134</td>
<td>170</td>
<td>102</td>
<td></td>
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</tr>
<tr>
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<td>47</td>
<td>92</td>
<td>36</td>
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<td>77</td>
<td>95</td>
<td>65</td>
<td>644</td>
<td>6%</td>
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<td>6</td>
<td>4</td>
<td>1</td>
<td>1</td>
<td>624</td>
<td>6%</td>
</tr>
<tr>
<td>Creswell</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td>624</td>
<td>6%</td>
</tr>
<tr>
<td>Single family</td>
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<td>67</td>
<td>80</td>
<td>91</td>
<td>133</td>
<td>60</td>
<td>56</td>
<td>84</td>
<td>27</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Multifamily</td>
<td>0</td>
<td>2</td>
<td>2</td>
<td>20</td>
<td>20</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>44</td>
<td>0%</td>
</tr>
<tr>
<td>Cottage Grove</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>258</td>
<td>2%</td>
</tr>
<tr>
<td>Single family</td>
<td>29</td>
<td>17</td>
<td>15</td>
<td>19</td>
<td>34</td>
<td>70</td>
<td>39</td>
<td>22</td>
<td>13</td>
<td></td>
<td></td>
</tr>
<tr>
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<td>0</td>
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<td>10</td>
<td>16</td>
<td>14</td>
<td>14</td>
<td>10</td>
<td>4</td>
<td></td>
<td>116</td>
<td>1%</td>
</tr>
<tr>
<td>Junction City</td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>226</td>
<td>2%</td>
</tr>
<tr>
<td>Single family</td>
<td>15</td>
<td>12</td>
<td>34</td>
<td>13</td>
<td>10</td>
<td>13</td>
<td>8</td>
<td>78</td>
<td>43</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Multifamily</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>4</td>
<td>0</td>
<td>4</td>
<td>0%</td>
</tr>
<tr>
<td>Veneta</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>612</td>
<td>6%</td>
</tr>
<tr>
<td>Single family</td>
<td>11</td>
<td>24</td>
<td>43</td>
<td>96</td>
<td>112</td>
<td>117</td>
<td>128</td>
<td>62</td>
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<td></td>
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</tr>
<tr>
<td>Oakridge</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>41</td>
<td>0%</td>
</tr>
<tr>
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<td>1</td>
<td>0</td>
<td>8</td>
<td>4</td>
<td>9</td>
<td>11</td>
<td>5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Multifamily</td>
<td>0</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>2</td>
<td>0</td>
<td>4</td>
<td>0%</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>8,175</td>
<td>75%</td>
</tr>
<tr>
<td>Single family</td>
<td>926</td>
<td>981</td>
<td>1,096</td>
<td>1,016</td>
<td>1,010</td>
<td>1,124</td>
<td>906</td>
<td>725</td>
<td>391</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Multifamily</td>
<td>177</td>
<td>176</td>
<td>217</td>
<td>195</td>
<td>359</td>
<td>740</td>
<td>294</td>
<td>365</td>
<td>162</td>
<td>2,685</td>
<td>25%</td>
</tr>
</tbody>
</table>

| Total of all types | 1,103 | 1,157 | 1,313 | 1,211 | 1,369 | 1,864 | 1,200 | 1,090 | 553   | 10,860| 100%    |

Commuting trends

Figure C-13 and Table C-21 show where residents of Eugene worked in 2006. Figure C-13 and Table C-21 show that 85% of residents of Eugene worked in Lane County, with 62% of Eugene residents working in Eugene and 10% working in Springfield. Roughly 10% of Eugene residents worked in unincorporated Lane County.

Table C-21. Places where residents of Eugene were employed, 2006

<table>
<thead>
<tr>
<th>Location</th>
<th>Number</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lane County</td>
<td>55,183</td>
<td>85%</td>
</tr>
<tr>
<td>Eugene</td>
<td>40,282</td>
<td>62%</td>
</tr>
<tr>
<td>Springfield</td>
<td>6,264</td>
<td>10%</td>
</tr>
<tr>
<td>Junction City</td>
<td>1,074</td>
<td>2%</td>
</tr>
<tr>
<td>Coburg</td>
<td>863</td>
<td>1%</td>
</tr>
<tr>
<td>Unincorporated Lane County</td>
<td>6,700</td>
<td>10%</td>
</tr>
<tr>
<td>Multnomah County</td>
<td>1,868</td>
<td>3%</td>
</tr>
<tr>
<td>Portland</td>
<td>1,692</td>
<td>3%</td>
</tr>
<tr>
<td>Marion County</td>
<td>1,471</td>
<td>2%</td>
</tr>
<tr>
<td>Washington County</td>
<td>1,256</td>
<td>2%</td>
</tr>
<tr>
<td>Linn County</td>
<td>1,026</td>
<td>2%</td>
</tr>
<tr>
<td>Douglas County</td>
<td>713</td>
<td>1%</td>
</tr>
<tr>
<td>Benton County</td>
<td>713</td>
<td>1%</td>
</tr>
<tr>
<td>Jackson County</td>
<td>536</td>
<td>1%</td>
</tr>
<tr>
<td>Deschutes County</td>
<td>534</td>
<td>1%</td>
</tr>
<tr>
<td>Coos County</td>
<td>267</td>
<td>0%</td>
</tr>
<tr>
<td>All Other Locations</td>
<td>1,441</td>
<td>2%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>65,008</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>

Source: US Census OnTheMap
http://lehdmapp3.did.census.gov/
Figure C-13. Places where residents in Eugene were employed, 2006


Figure C-14 and Table C-22 show where employees of firms located in Eugene lived in 2006. Eighty-five percent of workers in Eugene lived in Lane County. Forty-eight percent of workers in Eugene lived in Eugene. Approximately 37% of workers lived in unincorporated Lane County.
Table C-22. Places where workers in Eugene lived, 2006

<table>
<thead>
<tr>
<th>Location</th>
<th>Number</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lane County</td>
<td>70,234</td>
<td>85%</td>
</tr>
<tr>
<td>Eugene</td>
<td>40,282</td>
<td>48%</td>
</tr>
<tr>
<td>Springfield</td>
<td>10,189</td>
<td>12%</td>
</tr>
<tr>
<td>Unincorporated Lane County</td>
<td>19,763</td>
<td>24%</td>
</tr>
<tr>
<td>Multnomah County</td>
<td>1,776</td>
<td>2%</td>
</tr>
<tr>
<td>Washington County</td>
<td>1,658</td>
<td>2%</td>
</tr>
<tr>
<td>Linn County</td>
<td>1,649</td>
<td>2%</td>
</tr>
<tr>
<td>Marion County</td>
<td>1,331</td>
<td>2%</td>
</tr>
<tr>
<td>Clackamas County</td>
<td>1,017</td>
<td>1%</td>
</tr>
<tr>
<td>Douglas County</td>
<td>890</td>
<td>1%</td>
</tr>
<tr>
<td>Benton County</td>
<td>824</td>
<td>1%</td>
</tr>
<tr>
<td>Jackson County</td>
<td>798</td>
<td>1%</td>
</tr>
<tr>
<td>Deschutes County</td>
<td>756</td>
<td>1%</td>
</tr>
<tr>
<td>All Other Locations</td>
<td>2,172</td>
<td>3%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>83,105</td>
<td>100%</td>
</tr>
</tbody>
</table>

Source: US Census OnTheMap
http://lehdmap3.did.census.gov/

The implication of the data presented in this section is that majority of Eugene’s workforce lives in Lane County, with more than half of Eugene’s workforce commuting from outside of Eugene.

Figure C-14. Places where workers in Eugene lived, 2006

TRENDS IN STUDENT HOUSING DEVELOPMENT

Students at the University of Oregon accounted for about 13% of Eugene’s population in 2008, based on University enrollment information. Student housing preferences can have an important impact on demand for housing in Eugene. A recent trend in student housing is the demand for development of dwelling units with five or more bedrooms and shared common space and kitchen facilities. These dwellings are most common in neighborhoods near the University and may have five or more students living in them. While it seems that the market for this type of housing is limited by student housing demand and student housing preferences, continued growth in this type of housing could increase average household size slightly across the City.

Manufactured homes

Manufactured homes are and will be an important source of affordable housing within the City of Eugene in the future. They provide a form of homeownership that can be made available to low and moderate income households. Cities are required to plan for manufactured homes—both on lots and in parks (ORS 197.475-492).

Generally, manufactured homes in parks are owned by the occupants who pay rent for the space. Monthly housing costs are typically lower for a homeowner in a manufactured home park for several reasons, including the fact that property taxes levied on the value of the land are paid by the property owner rather than the manufactured homeowner. The value of the manufactured home generally does not appreciate in the way a conventional home would, however. Manufactured homeowners in parks are also subject to the mercy of the property owner in terms of rent rates and increases. It is generally not within the means of a manufactured homeowner to relocate a manufactured home to escape rent increases. Living in a park is desirable to some because it can provide a more secure community with on-site managers and amenities, such as laundry and recreation facilities.

The City had 2,250 manufactured homes in 1990 and 3,833 manufactured homes in 2007, an increase of 1,583 dwellings. Between 2001 and 2008, the City issued 227 permits for manufactured homes on lots and 315 permits for new manufactured homes in parks. According to Census data, 96% of the manufactured homes in the City were owner-occupied in 2007.

OAR 197.480(4) requires cities to inventory the mobile home or manufactured dwelling parks sited in areas planned and zoned or generally used for commercial, industrial or high density residential
development. Table C-23 presents the inventory of mobile and manufactured home parks within Eugene in 2009. The results show that Eugene had 42 manufactured home parks with 3,748 spaces and 113 vacant spaces. According to City of Eugene staff, one manufactured home park closed over the 2001 to 2008 period.

Table C-23. Inventory of Mobile/Manufactured Home Parks, City of Eugene, 2009

<table>
<thead>
<tr>
<th>Name</th>
<th>Location</th>
<th>Park Type</th>
<th>Total Spaces</th>
<th>Vacant Spaces</th>
</tr>
</thead>
<tbody>
<tr>
<td>Briarwood</td>
<td>4800 Barger Dr</td>
<td>55+</td>
<td>249</td>
<td>15</td>
</tr>
<tr>
<td>Brookdale</td>
<td>3868 Alban</td>
<td>Family</td>
<td>29</td>
<td>0</td>
</tr>
<tr>
<td>Camelia Apartment and Mobile Home Park</td>
<td>751-785 Hwy 99</td>
<td>Family</td>
<td>34</td>
<td>6</td>
</tr>
<tr>
<td>Camelot Manufactured Home Village</td>
<td>3700 Babcock Ln</td>
<td>55+</td>
<td>150</td>
<td>4</td>
</tr>
<tr>
<td>Churchill Meadows MHC</td>
<td>1415 S Bertelsen Rd #20</td>
<td>Family</td>
<td>159</td>
<td>6</td>
</tr>
<tr>
<td>Daneland Mobile Home Park</td>
<td>1199 N Terry St</td>
<td>55+</td>
<td>274</td>
<td>3</td>
</tr>
<tr>
<td>Elmira Estates</td>
<td>500 Taney St</td>
<td>Family</td>
<td>24</td>
<td>0</td>
</tr>
<tr>
<td>Eugene Mobile Village</td>
<td>4750 Franklin Blvd</td>
<td>Family</td>
<td>137</td>
<td>17</td>
</tr>
<tr>
<td>Falcon Wood Village</td>
<td>1475 Green Acres Rd</td>
<td>55+</td>
<td>182</td>
<td>0</td>
</tr>
<tr>
<td>Gainsborough</td>
<td>2555 Lansdown Rd</td>
<td>55+</td>
<td>73</td>
<td>2</td>
</tr>
<tr>
<td>Garfield Trailer Park</td>
<td>120 N Garfield</td>
<td>Unknown</td>
<td>20</td>
<td>0</td>
</tr>
<tr>
<td>Goodens Trailer Court</td>
<td>34934 Seavey Loop Rd</td>
<td>Unknown</td>
<td>11</td>
<td>Unknown</td>
</tr>
<tr>
<td>Hannah Del</td>
<td>2615 Janelle Way</td>
<td>Unknown</td>
<td>10</td>
<td>0</td>
</tr>
<tr>
<td>Hidden Meadows</td>
<td>3570 Elmira Rd</td>
<td>Family</td>
<td>113</td>
<td>13</td>
</tr>
<tr>
<td>Idle Wheels</td>
<td>3900 Coburd Rd</td>
<td>55+</td>
<td>64</td>
<td>4</td>
</tr>
<tr>
<td>Lakeridge of Eugene</td>
<td>3355 N Delta Hwy</td>
<td>55+</td>
<td>192</td>
<td>0</td>
</tr>
<tr>
<td>Lakewood Park</td>
<td>1800 Lakewood Ct</td>
<td>55+</td>
<td>181</td>
<td>1</td>
</tr>
<tr>
<td>Lee's Mobile Home Park</td>
<td>501 Division Ave #1</td>
<td>55+</td>
<td>70</td>
<td>0</td>
</tr>
<tr>
<td>Lewis Trailer Park</td>
<td>102 Alberta Dr</td>
<td>Unknown</td>
<td>16</td>
<td>0</td>
</tr>
<tr>
<td>Midway Manor</td>
<td>1625 Henderson Ave</td>
<td>55+</td>
<td>87</td>
<td>2</td>
</tr>
<tr>
<td>Mobile Towne West</td>
<td>555 N Danebo Ave</td>
<td>Family</td>
<td>156</td>
<td>2</td>
</tr>
<tr>
<td>Oaks Mobile Home Park</td>
<td>34956 Seavey Loop Sp 40</td>
<td>Family</td>
<td>77</td>
<td>6</td>
</tr>
<tr>
<td>Orchard Point Mobile Home Park</td>
<td>27171 Clear Lake Rd</td>
<td>Family</td>
<td>56</td>
<td>5</td>
</tr>
<tr>
<td>Parkside Mobile Home Community</td>
<td>3950 Coburg Rd</td>
<td>55+</td>
<td>82</td>
<td>0</td>
</tr>
<tr>
<td>Plaza West</td>
<td>1403 W 6th Ave</td>
<td>Family</td>
<td>21</td>
<td>2</td>
</tr>
<tr>
<td>Ponderosa Mobile Village</td>
<td>3998 Franklin Blvd</td>
<td>55+</td>
<td>48</td>
<td>0</td>
</tr>
<tr>
<td>River Bank Trailer Park</td>
<td>4501 Franklin Blvd</td>
<td>Unknown</td>
<td>47</td>
<td>Unknown</td>
</tr>
<tr>
<td>Riverside Mobile Home Court</td>
<td>4795 Franklin Blvd</td>
<td>Family</td>
<td>71</td>
<td>8</td>
</tr>
<tr>
<td>Roosevelt Acres</td>
<td>4175 Fergus Ave</td>
<td>Family</td>
<td>44</td>
<td>2</td>
</tr>
<tr>
<td>Rosewood Mobile Home Park</td>
<td>2350 N Terry Street</td>
<td>Family</td>
<td>119</td>
<td>0</td>
</tr>
<tr>
<td>Rowan Oak Estates</td>
<td>2333 N Terry St</td>
<td>Family</td>
<td>50</td>
<td>1</td>
</tr>
<tr>
<td>Royal Court</td>
<td>1445 Railroad Blvd</td>
<td>Family</td>
<td>23</td>
<td>0</td>
</tr>
<tr>
<td>Royal Oaks Mobile Home Park</td>
<td>4900 Royal Ave</td>
<td>Family</td>
<td>110</td>
<td>0</td>
</tr>
<tr>
<td>Seaver Mobile Home Park</td>
<td>4475 Franklin Blvd</td>
<td>Family</td>
<td>16</td>
<td>1</td>
</tr>
<tr>
<td>Shady Dell Trailer Ct</td>
<td>795 Hwy 99N</td>
<td>Unknown</td>
<td>4</td>
<td>Unknown</td>
</tr>
<tr>
<td>Shamrock Village</td>
<td>4531 Franklin Blvd</td>
<td>55+</td>
<td>47</td>
<td>0</td>
</tr>
<tr>
<td>SongBrook</td>
<td>4055 Royal Ave #161</td>
<td>55+</td>
<td>140</td>
<td>0</td>
</tr>
<tr>
<td>Summer Oaks Mobile Home Park</td>
<td>3220 Crescent Ave</td>
<td>55+</td>
<td>102</td>
<td>0</td>
</tr>
<tr>
<td>Sustello's Country Acres</td>
<td>89636 Fir Butte Rd</td>
<td>Family</td>
<td>14</td>
<td>0</td>
</tr>
<tr>
<td>Topper Trailer Court</td>
<td>717 Hwy 99N</td>
<td>Unknown</td>
<td>10</td>
<td>Unknown</td>
</tr>
<tr>
<td>Twin Totem</td>
<td>4660 Franklin Blvd</td>
<td>Family</td>
<td>38</td>
<td>10</td>
</tr>
<tr>
<td>Woodland Park Estates</td>
<td>1699 N Terry St</td>
<td>Family</td>
<td>398</td>
<td>3</td>
</tr>
</tbody>
</table>

Total 3,748 113

Source: Oregon Manufactured Dwelling Park Directory
http://o.hcs.state.or.us/MDPCRParks/ParkDirQuery.jsp
Summary of key demographic and housing trends

Eugene has a larger share of college aged people than Lane County as a whole

- Eugene has a greater proportion of its population aged 20-29 years than the County or State averages.
- Eugene has fewer households with children under 18 years (28%) than nearby cities, including Springfield (38%), Coburg (40%), Cottage Grove (36%), Creswell (45%), Junction City (37%), and Veneta (48%).
- Eugene has a smaller share of residents over the age of 65 (13%) compared with some communities in Lane County, notably Oakridge and Cottage Grove.

Eugene’s population is growing older.

- People aged 45 to 64 increased by more than 6,700 people (22%) between 2000 and 2007. People aged 65 and older increased by more than 3,700 people (23%) over the same period.
- Eugene’s population of people aged 5 to 17 decreased by about 400 people (-2%) between 2000 and 2007.
- The State forecasts that Lane County’s population will continue to get older on average between 2010 and 2030. The share of population in people 60 years and older is forecast to increase from 17% of the population in 2000 to 26% of the population in 2030. The share of population 29 years and younger is forecast to decrease from 42% in 2000 to 36% in 2030.

Eugene’s households are generally smaller.

- Eugene had fewer people per household, with an average household size of 2.25 people, compared to the County average of 2.41 and State average of 2.49 people per household.
- Eugene had more one and two person households (71%), compared to the State (64%) and Lane County (68%).
- Eugene had a larger share of 1-person households (34%) than the State or County (both 28%).

Eugene had more non-family households and fewer households with children.

- Eugene had a larger share of non-family households (48%) than the County average (39%) or State average (36%).
• Eugene had a smaller share of households with married couples (40%), with and without children, than the State (50%) or County (58%).

• Eugene had a smaller share of households with children (24%) compared to Lane County (27%) and Oregon (29%).

• Eugene’s share of female householders with children and no husband (6%) was similar to the County (6%) and the State (7%).

Homeownership and household size are related with age.

• More than half of householders aged 35 and older were homeowners. Homeownership increases with age, until age 55.

• After age 75, homeownership decreases.

• Householders younger than 34 years and older than 75 years were more likely to be renters in single-person households.

• Householders 55 years and older were more likely to be homeowners in single-person households.

Eugene is becoming more ethnically diverse.

• Eugene’s Hispanic/Latino population grew by 259% between 1990 and 2007, compared with 206% growth in Lane County’s and 251% growth in the State’s Hispanic/Latino population during the same period.

• Other smaller communities near Eugene experienced triple-digit growth in Hispanic/Latino populations between 1990 and 2000. The communities experiencing the largest increase in the Hispanic/Latino populations were Springfield (2,352 people), Junction City (318 people), Cottage Grove (255 people), and Creswell (142 people).

Hispanic/Latino residents become homeowners younger.

• In 2000, 75.9% of Hispanic/Latino Oregonians were under 35 compared to 45.7% of non-Hispanic/Latino residents.

• The average size of a Hispanic/Latino household in 2000 in Eugene was 2.95 people, compared with 2.27 people in all households. Household sizes in Lane County were larger: 2.42 for all households and 3.19 for Hispanic/Latino households.

• 72% of Hispanic/Latino homeowners are under the age of 45, compared to 38% of non Hispanic/Latino homeowners.
Eugene is part of a complex, interconnected regional housing market.

- Commuting is typical throughout the region: Eugene’s workforce lives in Lane County, but over half do not reside in the City of Eugene.

Since 2000, housing starts in the selected cities within Lane County have been dominated by single-family types.

- The data show that new housing development in the 2000-2008 period was predominately single-family housing types. In fact, only 25% of all units for which building permits were issued in selected cities in Lane County were for multifamily housing types.

- The rate of multifamily permits issued at selected cities in Lane County increased in 2005 to 40% of permits issued compared to one-quarter or fewer of permits issued between 2000 and 2004. Between 20006 and 2008, multifamily permits accounted for between one-quarter and one-third of permits issued.

- Multifamily permits accounted for 17% of permits issued in Eugene over the 2000 to 2008 period. The share of multifamily permits issued in Eugene ranged from 9% of permits issued in 2003 to 46% of permits issued in 2007.

Housing types are trending towards larger units on smaller lots.

- Between 1998 and 2008 the median size of new single-family dwellings increased 11%, from 2,000 sq. ft. to 2,219 sq. ft. nationally and 11% in the western region from 1,985 sq. ft. to 2,213 sq. ft. Between 1994 and 2008 the percentage of lots under 7,000 sq. ft. increased from 29% of lots to 34% of lots. A corresponding 3% decrease in lots over 11,000 sq. ft. is seen.

- Both black families and Hispanic families had significantly lower likelihood of homeownership, lower house values (for owners) and lower rents (for renters), even controlling for income and savings, level of education, age, marital status, family size, the housing market in which the unit was located, compared to whites.29

Implications of demographic and housing trends for housing need

The purpose of the analysis thus far has been to give some background on the kinds of factors that influence housing choice, and in doing, to convey why the number and interrelationships among those factors ensure that generalizations about housing choice are difficult and prone to inaccuracies.

There is no question that age affects housing type and tenure. Mobility is substantially higher for people aged 20 to 34. People in that age group will also have, on average, less income than people who are older. They are less likely to have children. All of these factors mean that younger households are much more likely to be renters and renters are more likely to be in multi-family housing.

The data illustrate what more detailed research has shown and what most people understand intuitively: life cycle and housing choice interact in ways that are predictable in the aggregate; age of the household head is correlated with household size and income; household size and age of household head affect housing preferences; income affects the ability of a household to afford a preferred housing type. The connection between socioeconomic and demographic factors, on the one hand, and housing choice, on the other, is often described informally by giving names to households with certain combinations of characteristics: the "traditional family," the "never marrieds," the "dinks" (dual-income, no kids), the "empty nesters." Thus, simply looking at the long wave of demographic trends can provide good information for estimating future housing demand.

Thus, one is ultimately left with the need to make a qualitative assessment of the future housing market. Following is a discussion of how demographic and housing trends are likely to affect housing in Eugene for the next 20-years:

- **On average, future housing will look a lot like past housing.** That is the assumption that underlies any trend forecast, and one that allows some quantification of the composition of demand for new housing. As a first approximation, the next five years, and maybe the first 10 years, of residential growth will look a lot like the last five years.

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30 See Planning for Residential Growth: A Workbook for Oregon's Urban Areas (June 1997).
• **If the future differs from the past, it is likely to move in the direction (on average) of smaller units and more diverse housing types.** Most of the evidence suggests that the bulk of the change will be in the direction of smaller average house and lot sizes for single-family housing. In summary, an aging population, increasing housing costs, and other variables are factors that support the conclusion of smaller and less expensive units and a broader array of housing choices.

• **No amount of analysis is likely to make the long-run future any more certain:** the purpose of the housing forecasting in this study is to get an approximate idea about the long run so policy choices can be made today. It is axiomatic among economic forecasters that any economic forecast more than three (or at most five) years out is highly speculative. At one year one is protected from being disastrously wrong by the sheer inertia of the economic machine. But a variety of factors or events could cause growth forecasts to be substantially different.
C.4.4 **STEP 4: DETERMINE THE TYPES OF HOUSING THAT ARE LIKELY TO BE AFFORDABLE TO THE PROJECTED POPULATION BASED ON HOUSEHOLD INCOME**

Step four of the housing needs assessment results in an estimate of need for housing by income and housing type. This requires some estimate of the income distribution of future households in the community. ECO developed these estimates based on estimated incomes of households that live in Eugene. The key finding from this analysis is that an affordability gap exists for lower income households. As a result, Eugene’s needed density is higher than the achieved density and Eugene’s needed mix is for more affordable housing types (less single-family detached and more of other housing types). The determination of needed density and mix will be made as a part of Envision Eugene.

**Income and affordability of housing**

This section summarizes regional and local income and housing cost trends. Income is one of the key determinants in housing choice and households’ ability to afford housing. A review of historical income and housing price trends provides insights into the local and regional housing markets.

Table C-24 shows a set of inflation adjusted income indicators for Eugene and Lane County. The results paint a mixed picture, but generally suggest that income (by most measures) increased during the 1990s, and decreased between 1999 and 2008. Overall, median household and median family incomes increased slightly during the 19-year period between 1989 and 2008.

The data show that the percentage of persons below the poverty level increased in Eugene and Lane County between 1999 and 2008.

<table>
<thead>
<tr>
<th></th>
<th>1989</th>
<th>1999</th>
<th>2008</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Eugene</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Median HH Income</td>
<td>$40,083</td>
<td>$44,454</td>
<td>$43,343</td>
</tr>
<tr>
<td>Median Family Income</td>
<td>$53,962</td>
<td>$60,173</td>
<td>$56,110</td>
</tr>
<tr>
<td>Per Capita Income</td>
<td>$21,940</td>
<td>$26,431</td>
<td>$24,024</td>
</tr>
<tr>
<td>% Persons Below Pov</td>
<td>17%</td>
<td>17%</td>
<td>21%</td>
</tr>
<tr>
<td><strong>Lane County</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Median HH Income</td>
<td>$39,923</td>
<td>$45,808</td>
<td>$40,456</td>
</tr>
<tr>
<td>Median Family Income</td>
<td>$48,606</td>
<td>$55,938</td>
<td>$57,401</td>
</tr>
<tr>
<td>Per Capita Income</td>
<td>$19,861</td>
<td>$24,404</td>
<td>$24,288</td>
</tr>
<tr>
<td>% Persons Below Pov</td>
<td>14%</td>
<td>14%</td>
<td>16%</td>
</tr>
</tbody>
</table>


A typical standard used to determine housing affordability is that a household should pay no more than a certain percentage of household income for housing, including payments and interest or rent, utilities, and insurance. HUD guidelines indicate that households paying more than 30% of their income on housing experience “cost burden” and households paying more than 50% of their income on housing experience “severe cost burden.” Using cost burden as an indicator is consistent with the Goal 10 requirement of providing housing that is affordable to all households in a community.

According to the U.S. Census, about 58,000 households in Lane County — more than 40% — paid more than 30% of their income for housing expenses in 2008. Table C-25 shows housing costs as a percent of income by tenure for Eugene households in 2008. The data show that about 45% of Eugene households experienced cost burden in 2008. The rate was much higher for renters (58%) than for homeowners (33%).

Table C-25. Housing cost as a percentage of household income, Eugene, 2008

<table>
<thead>
<tr>
<th>Percent of Income</th>
<th>Owners</th>
<th></th>
<th>Renters</th>
<th></th>
<th>Total</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Number</td>
<td>Percent</td>
<td>Number</td>
<td>Percent</td>
<td>Number</td>
<td>Percent</td>
</tr>
<tr>
<td>Less than 20%</td>
<td>12,728</td>
<td>39%</td>
<td>5,364</td>
<td>18%</td>
<td>18,092</td>
<td>29%</td>
</tr>
<tr>
<td>20% - 24%</td>
<td>6,120</td>
<td>19%</td>
<td>3,922</td>
<td>13%</td>
<td>10,042</td>
<td>16%</td>
</tr>
<tr>
<td>25% - 29%</td>
<td>3,087</td>
<td>9%</td>
<td>3,080</td>
<td>10%</td>
<td>6,167</td>
<td>10%</td>
</tr>
<tr>
<td>30% - 34%</td>
<td>2,429</td>
<td>7%</td>
<td>2,662</td>
<td>9%</td>
<td>5,091</td>
<td>8%</td>
</tr>
<tr>
<td>35% or more</td>
<td>8,376</td>
<td>26%</td>
<td>14,706</td>
<td>49%</td>
<td>23,082</td>
<td>37%</td>
</tr>
<tr>
<td>Total</td>
<td>32,740</td>
<td>100%</td>
<td>29,734</td>
<td>100%</td>
<td>62,474</td>
<td>100%</td>
</tr>
<tr>
<td>Cost Burden</td>
<td>10,805</td>
<td>33%</td>
<td>17,368</td>
<td>58%</td>
<td>28,173</td>
<td>45%</td>
</tr>
</tbody>
</table>

Source: American Community Survey 2008 B25070 B25091
In comparison, 42% of Lane County’s households were cost burdened in 2008, with 56% of renter households cost burdened and 33% of owner households cost burdened. The State average of cost burden was 39%, with 50% of renter households cost burdened and 34% of owner households cost burdened.

While cost burden is a common measure of housing affordability, it does have some limitations. Two important limitations are:

- A household is defined as cost burdened if the housing costs exceed 30% of their income, regardless of actual income. The remaining 70% of income is expected to be spent on non-discretionary expenses, such as food or medical care, and on discretionary expenses. Households with higher income may be able to pay more than 30% of their income on housing without impacting the household’s ability to pay for necessary non-discretionary expenses.

- Cost burden compares income to housing costs and does not account for accumulated wealth. As a result, the estimate of how much a household can afford to pay for housing does not include the impact of accumulated wealth a household’s ability to pay for housing. For example, a household with retired people may have relatively low income but may have accumulated assets (such as profits from selling another house) that allow them to purchase a house that would be considered unaffordable to them based on the cost burden indicator.

Cost burden is only one indicator of housing affordability. Another way of exploring the issue of financial need is to review wage rates and housing affordability. Table C-26 shows an illustration of affordable housing wage and rent gap for households in Lane County at different percentages of median family income (MFI). The data are for a typical family of four. The results indicate that a household must earn $14.73 an hour to afford a two-bedroom unit according to HUD’s market rate rent estimate.
Table C-26. Illustration of affordable housing wage and rent gap by HUD income categories for a two-bedroom rental unit, Lane County, 2009

<table>
<thead>
<tr>
<th>Value</th>
<th>Minimum Wage</th>
<th>30% MFI</th>
<th>50% MFI</th>
<th>80% MFI</th>
<th>100% MFI</th>
<th>120% MFI</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Hours</td>
<td>2086</td>
<td>2086</td>
<td>2086</td>
<td>2086</td>
<td>2086</td>
<td>2086</td>
</tr>
<tr>
<td>Derived Hourly Wage</td>
<td>$8.40</td>
<td>$7.97</td>
<td>$13.28</td>
<td>$21.25</td>
<td>$26.56</td>
<td>$31.87</td>
</tr>
<tr>
<td>Annual Wage At Minimum Wage</td>
<td>$17,522</td>
<td>$16,620</td>
<td>$27,700</td>
<td>$44,320</td>
<td>$55,400</td>
<td>$66,480</td>
</tr>
<tr>
<td>Annual Affordable Rent</td>
<td>$5,257</td>
<td>$4,986</td>
<td>$8,310</td>
<td>$13,296</td>
<td>$16,620</td>
<td>$19,944</td>
</tr>
<tr>
<td>Monthly Affordable Rent</td>
<td>$438</td>
<td>$416</td>
<td>$693</td>
<td>$1,108</td>
<td>$1,385</td>
<td>$1,662</td>
</tr>
<tr>
<td>HUD Fair Market Rent (2 Bedroom)</td>
<td>$768</td>
<td>$768</td>
<td>$768</td>
<td>$768</td>
<td>$768</td>
<td>$768</td>
</tr>
<tr>
<td>Is HUD FMR Higher Than The Monthly Affordable Rent?</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Rent Paid Monthly OVER 30% of Income</td>
<td>$330</td>
<td>$353</td>
<td>$76</td>
<td>na</td>
<td>na</td>
<td>na</td>
</tr>
<tr>
<td>Rent Paid Annually OVER 30% of Income</td>
<td>$3,959</td>
<td>$4,230</td>
<td>$906</td>
<td>na</td>
<td>na</td>
<td>na</td>
</tr>
<tr>
<td>Percentage of Income Paid OVER 30% of Income for Rent</td>
<td>23%</td>
<td>25%</td>
<td>3%</td>
<td>na</td>
<td>na</td>
<td>na</td>
</tr>
<tr>
<td>Total Spent on Housing</td>
<td>53%</td>
<td>55%</td>
<td>33%</td>
<td>21%</td>
<td>17%</td>
<td>14%</td>
</tr>
<tr>
<td>For this area what would the &quot;Affordable Housing Wage&quot; be?</td>
<td>$14.73</td>
<td>$14.73</td>
<td>$14.73</td>
<td>$14.73</td>
<td>$14.73</td>
<td>$14.73</td>
</tr>
<tr>
<td>The Affordable Housing Wage Gap IS:</td>
<td>$6.33</td>
<td>$6.76</td>
<td>$1.45</td>
<td>na</td>
<td>na</td>
<td>na</td>
</tr>
</tbody>
</table>

MFI: Median family income, FMR: Fair market rent

Table C-27 shows this same analysis for the year 2000 in Lane County. The affordable housing wage gap in 2009 was larger than it was in 2000 for those earning minimum wage or 30% MFI. For those earning 50% MFI, the affordable housing wage gap decreased slightly between 2000 and 2009.

Table C-27. Illustration of affordable housing wage and rent gap by HUD income categories for a two-bedroom rental unit, Lane County, 2000

<table>
<thead>
<tr>
<th>Value</th>
<th>Minimum Wage</th>
<th>30% MFI</th>
<th>50% MFI</th>
<th>80% MFI</th>
<th>100% MFI</th>
<th>120% MFI</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Hours</td>
<td>2086</td>
<td>2086</td>
<td>2086</td>
<td>2086</td>
<td>2086</td>
<td>2086</td>
</tr>
<tr>
<td>Derived Hourly Wage</td>
<td>$6.00</td>
<td>$6.00</td>
<td>$10.00</td>
<td>$15.99</td>
<td>$19.99</td>
<td>$23.99</td>
</tr>
<tr>
<td>Annual Wage At Minimum Wage</td>
<td>$13,559</td>
<td>$12,510</td>
<td>$20,850</td>
<td>$33,360</td>
<td>$41,700</td>
<td>$50,040</td>
</tr>
<tr>
<td>Annual Affordable Rent</td>
<td>$4,068</td>
<td>$3,753</td>
<td>$6,255</td>
<td>$10,008</td>
<td>$12,510</td>
<td>$15,012</td>
</tr>
<tr>
<td>Monthly Affordable Rent</td>
<td>$339</td>
<td>$313</td>
<td>$521</td>
<td>$834</td>
<td>$1,043</td>
<td>$1,251</td>
</tr>
<tr>
<td>HUD Fair Market Rent (2 Bedroom)</td>
<td>$600</td>
<td>$600</td>
<td>$600</td>
<td>$600</td>
<td>$600</td>
<td>$600</td>
</tr>
<tr>
<td>Is HUD FMR Higher Than The Monthly Affordable Rent?</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Rent Paid Monthly OVER 30% of Income</td>
<td>$261</td>
<td>$287</td>
<td>$79</td>
<td>na</td>
<td>na</td>
<td>na</td>
</tr>
<tr>
<td>Rent Paid Annually OVER 30% of Income</td>
<td>$3,132</td>
<td>$3,447</td>
<td>$945</td>
<td>na</td>
<td>na</td>
<td>na</td>
</tr>
<tr>
<td>Percentage of Income Paid OVER 30% of Income for Rent</td>
<td>23%</td>
<td>28%</td>
<td>5%</td>
<td>na</td>
<td>na</td>
<td>na</td>
</tr>
<tr>
<td>Total Spent on Housing</td>
<td>53%</td>
<td>58%</td>
<td>35%</td>
<td>22%</td>
<td>17%</td>
<td>14%</td>
</tr>
<tr>
<td>For this area what would the &quot;Affordable Housing Wage&quot; be?</td>
<td>$11.51</td>
<td>$11.51</td>
<td>$11.51</td>
<td>$11.51</td>
<td>$11.51</td>
<td>$11.51</td>
</tr>
<tr>
<td>The Affordable Housing Wage Gap IS:</td>
<td>$5.01</td>
<td>$5.51</td>
<td>$1.51</td>
<td>na</td>
<td>na</td>
<td>na</td>
</tr>
</tbody>
</table>

MFI: Median family income, FMR: Fair market rent

Table C-28 shows a rough estimate of affordable housing cost and units by income levels for Eugene in 2008 based on Census data about household income, the value of owner occupied housing in Eugene, and rental costs in Eugene. Several points should be kept in mind when interpreting this data:

- Affordable monthly housing costs and estimate of affordable purchase prices are based on HUD income standards and assume that a household will not spend more than 30% of household income on housing costs. Some households pay more than 30% of household income on housing costs, generally because they are unable to find
more affordable housing or because wealthier households are able to pay a larger share of income for housing costs.

- HUD’s affordability guidelines for Fair Market Rent are based on median family income and provide a rough estimate of financial need. These guidelines may mask other barriers to affordable housing such as move-in costs, competition for housing from higher income households, and availability of suitable units. They also ignore other important factors such as accumulated assets, purchasing housing as an investment, and the effect of down payments and interest rates on housing affordability.

- Households compete for housing in the marketplace. In other words, affordable housing units are not necessarily available to low income households. For example, if an area has a total of 50 dwelling units that are affordable to households earning 30% of median family income, 50% of those units may already be occupied by households that earn more than 30% of median family income.

The data in Table C-28 indicate that in 2008:

- About one-fifth of Eugene households could not afford a studio apartment according to HUD's estimate of $495 as fair market rent;
- About one-third of Eugene households could not afford a two-bedroom apartment at HUD's fair market rent level of $760;
- A household earning median family income ($55,500) could afford a home valued up to about $138,750.

### Table C-28. Rough estimate of housing affordability, Eugene, 2008

<table>
<thead>
<tr>
<th>Income Level</th>
<th>Number of HH</th>
<th>Percent</th>
<th>Affordable Monthly Housing Cost</th>
<th>Crude Estimate of Affordable Purchase Owner-Occupied Unit</th>
<th>Est. Number of Owner Units</th>
<th>Est. Number of Renter Units</th>
<th>Surplus (Deficit)</th>
<th>HUD Fair Market Rent (FMR) in 2008</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than $10,000</td>
<td>7,567</td>
<td>12%</td>
<td>$0 to $250</td>
<td>$0 to $25,000</td>
<td>1,056</td>
<td>757</td>
<td>(5,754)</td>
<td></td>
</tr>
<tr>
<td>$10,000 to $14,999</td>
<td>4,194</td>
<td>7%</td>
<td>$250 to $375</td>
<td>$25,000 to $37,000</td>
<td>485</td>
<td>2,304</td>
<td>(1,405)</td>
<td></td>
</tr>
<tr>
<td>$15,000 to $24,999</td>
<td>9,359</td>
<td>15%</td>
<td>$375 to $625</td>
<td>$37,500 to $62,500</td>
<td>341</td>
<td>7,158</td>
<td>(1,860)</td>
<td></td>
</tr>
<tr>
<td>$25,000 to $34,999</td>
<td>7,651</td>
<td>12%</td>
<td>$625 to $875</td>
<td>$62,500 to $87,500</td>
<td>434</td>
<td>8,206</td>
<td>988</td>
<td></td>
</tr>
<tr>
<td>$35,000 to $49,999</td>
<td>8,396</td>
<td>13%</td>
<td>$875 to $1,250</td>
<td>$87,500 to $125,000</td>
<td>902</td>
<td>9,541</td>
<td>2,047</td>
<td></td>
</tr>
<tr>
<td>$50,000 to $74,999</td>
<td>10,926</td>
<td>17%</td>
<td>$1,250 to $1,875</td>
<td>$125,000 to $187,500</td>
<td>4,896</td>
<td>2,066</td>
<td>(3,956)</td>
<td></td>
</tr>
<tr>
<td>Eugene MSA 2008 MFI: $55,500</td>
<td>1,388</td>
<td>$1,388</td>
<td>$138,750</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>$75,000 to $99,999</td>
<td>7,332</td>
<td>11%</td>
<td>$1,875 to $2,450</td>
<td>$187,500 to $245,000</td>
<td>6,745</td>
<td>729</td>
<td>143</td>
<td></td>
</tr>
<tr>
<td>$100,000 to $149,999</td>
<td>5,708</td>
<td>9%</td>
<td>$2,450 to $3,750</td>
<td>$245,000 to $375,000</td>
<td>11,291</td>
<td>140</td>
<td>5,722</td>
<td></td>
</tr>
<tr>
<td>$150,000 or more</td>
<td>3,124</td>
<td>5%</td>
<td>More than $3,750</td>
<td>More than $375,000</td>
<td>7,068</td>
<td>140</td>
<td>4,084</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>64,257</td>
<td>100%</td>
<td></td>
<td></td>
<td>33,217</td>
<td>31,040</td>
<td>0</td>
<td></td>
</tr>
</tbody>
</table>

Notes: FMR-Fair market rent; bdrm - bedrooms
The conclusion based on the data presented in Table C-28 is that in 2008 Eugene had a significant deficit of nearly 7,200 affordable housing units for households that earn less than $15,000 annually. The next section examines changes in housing cost between 2000 and 2009.

Changes in housing cost

According to the Federal Housing Finance Agency (FHFA), the average sales price of a single-family home in the Eugene-Springfield MSA increased 216% between 2000 and 2009. The greatest increases in average housing price occurred between the third quarter of 2004 and the fourth quarter of 2006. The average sales price decreased by 35% between second quarter 2008 and fourth quarter 2009. Average sales prices in the State of Oregon followed the same patterns over the 2000 to 2009 period.31

To quantify these housing price trends, ECO analyzed data from four sources: (1) Multiple Listings Service; (2) U.S. Census, and (3) rental data from Duncan & Brown, a Eugene-based real estate analysis firm that conducted rent surveys for the Metropolitan Region until 2005.

Housing values

Table C-29 shows change in median housing value in Lane County and Eugene for the 1990 to 2000 period and 2000 to 2008 period. Housing prices doubled between 1990 and 2000 in Eugene from nearly $73,000 in 1990 to $145,000 in 2000, increasing by more than $72,000 or 99%. Lane County’s housing prices increased by $70,500 or 108% over the same period.

Between 2000 and 2008, Eugene’s housing prices increased from nearly $145,000 in 2008 in Eugene to $260,200 in 2008, increasing by more than $115,000 or 79%. Lane County’s housing prices increased by $110,400 or 81% over the same period.

---

Table C-29. Median housing value, owner-occupied housing units, Lane County and Eugene, 1990 to 2008

<table>
<thead>
<tr>
<th>Year</th>
<th>Lane County</th>
<th>Eugene</th>
</tr>
</thead>
<tbody>
<tr>
<td>1990</td>
<td>$65,500</td>
<td>$72,800</td>
</tr>
<tr>
<td>2000</td>
<td>$136,000</td>
<td>$145,000</td>
</tr>
<tr>
<td>2005</td>
<td>$173,600</td>
<td>$187,000</td>
</tr>
<tr>
<td>2006</td>
<td>$213,500</td>
<td>$224,900</td>
</tr>
<tr>
<td>2007</td>
<td>$230,500</td>
<td>$241,100</td>
</tr>
<tr>
<td>2008</td>
<td>$246,400</td>
<td>$260,200</td>
</tr>
</tbody>
</table>

Change 1990 to 2000

<table>
<thead>
<tr>
<th></th>
<th>Lane County</th>
<th>Eugene</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amount</td>
<td>$70,500</td>
<td>$72,200</td>
</tr>
<tr>
<td>Percent</td>
<td>108%</td>
<td>99%</td>
</tr>
</tbody>
</table>

Change 2000 to 2008

<table>
<thead>
<tr>
<th></th>
<th>Lane County</th>
<th>Eugene</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amount</td>
<td>$110,400</td>
<td>$115,200</td>
</tr>
<tr>
<td>Percent</td>
<td>81%</td>
<td>79%</td>
</tr>
</tbody>
</table>

Source: US Census 2000 SF3 H56

Figure C-15 shows a comparison of housing value for owner-occupied housing units in Oregon, Lane County, and Eugene in 2008. Eugene had a larger share of housing valued between $200,000 to $400,000 (55%), compared to the County (51%) and State (49%). Eugene had a smaller share of housing valued less than $200,000 (8%) than the State (28%) or County (12%). Eugene and Lane County had a smaller share of housing valued more than $400,000 (16%) than the State (23%).

Figure C-15. Housing value, owner-occupied housing units, Oregon, Lane County, and Eugene, 2008

Source: American Community Survey, 2008; Table B25075
Table C-30 presents data about average and median sales prices for areas within Eugene for 2001 and 2008. The median and average sales prices increased by 50% or more for nearly all areas within Eugene over the eight year period. The largest increases in median sales price were in East Eugene, with an increase of 82% ($131,300) and Southwest Eugene, with an increase of 78% ($125,000). The smallest increases in median sales price were in North Gilham, with an increase of 47% ($80,000) and West Eugene, with an increase of 71% ($81,700).

Table C-30. Average and median sales price, single-family dwellings, areas in Eugene, 2001-2008

<table>
<thead>
<tr>
<th>Area in Eugene</th>
<th>2001</th>
<th>2008</th>
<th>Change 200 to 2008</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Number</td>
<td>Dollar</td>
<td>Percent</td>
</tr>
<tr>
<td></td>
<td>of Sales</td>
<td>Change</td>
<td></td>
</tr>
<tr>
<td><strong>Median Sales Price</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>North Gilham</td>
<td>$170,000</td>
<td>$250,000</td>
<td>1,126 $80,000 47%</td>
</tr>
<tr>
<td>Ferry Street Bridge</td>
<td>$156,500</td>
<td>$259,500</td>
<td>2,651 $103,000 66%</td>
</tr>
<tr>
<td>East Eugene</td>
<td>$160,000</td>
<td>$291,300</td>
<td>2,652 $131,300 82%</td>
</tr>
<tr>
<td>Southwest Eugene</td>
<td>$160,000</td>
<td>$285,000</td>
<td>3,912 $125,000 78%</td>
</tr>
<tr>
<td>West Eugene</td>
<td>$115,300</td>
<td>$197,000</td>
<td>1,261 $81,700 71%</td>
</tr>
<tr>
<td>Danebo</td>
<td>$119,000</td>
<td>$185,000</td>
<td>3,684 $66,000 55%</td>
</tr>
<tr>
<td>River Road</td>
<td>$128,000</td>
<td>$214,300</td>
<td>1,227 $86,300 67%</td>
</tr>
<tr>
<td>Santa Clara</td>
<td>$155,000</td>
<td>$249,000</td>
<td>2,760 $94,000 61%</td>
</tr>
<tr>
<td><strong>Average Sales Price</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>North Gilham</td>
<td>$195,900</td>
<td>$301,300</td>
<td>1,126 $105,400 54%</td>
</tr>
<tr>
<td>Ferry Street Bridge</td>
<td>$179,400</td>
<td>$287,800</td>
<td>2,651 $108,400 60%</td>
</tr>
<tr>
<td>East Eugene</td>
<td>$185,800</td>
<td>$333,600</td>
<td>2,652 $147,800 80%</td>
</tr>
<tr>
<td>Southwest Eugene</td>
<td>$188,800</td>
<td>$313,900</td>
<td>3,912 $125,100 66%</td>
</tr>
<tr>
<td>West Eugene</td>
<td>$125,700</td>
<td>$216,800</td>
<td>1,261 $91,100 72%</td>
</tr>
<tr>
<td>Danebo</td>
<td>$119,300</td>
<td>$175,800</td>
<td>3,684 $56,500 47%</td>
</tr>
<tr>
<td>River Road</td>
<td>$130,400</td>
<td>$218,100</td>
<td>1,227 $87,700 67%</td>
</tr>
<tr>
<td>Santa Clara</td>
<td>$159,800</td>
<td>$262,100</td>
<td>2,760 $102,300 64%</td>
</tr>
</tbody>
</table>

Source: Multiple Listing Service (MLS), Analysis by ECONorthwest
Housing rental costs

Table C-31 shows the median contract rent for Lane County cities. The highest median contract rents from the 2000 Census were in Eugene and Springfield. The lowest median contract rents were in Oakridge and Creswell. Median contract rent in Eugene was $566.

Table C-31. Median contract rent, Lane County cities, 1999

<table>
<thead>
<tr>
<th>Location</th>
<th>Rent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eugene</td>
<td>$566</td>
</tr>
<tr>
<td>Springfield</td>
<td>$518</td>
</tr>
<tr>
<td>Veneta</td>
<td>$502</td>
</tr>
<tr>
<td>Coburg</td>
<td>$598</td>
</tr>
<tr>
<td>Junction City</td>
<td>$491</td>
</tr>
<tr>
<td>Cottage Grove</td>
<td>$456</td>
</tr>
<tr>
<td>Creswell</td>
<td>$417</td>
</tr>
<tr>
<td>Oakridge</td>
<td>$384</td>
</tr>
</tbody>
</table>

Source: US Census 2000 SF3 H56

Table C-32 shows median contract rent for Lane County and Eugene in 2000 and 2005 through 2008. Rent increased during this seven-year period by $120 (21%) in Eugene, compared to $125 (23%) in Lane County.

Table C-32. Median contract rent, Lane County and Eugene, 2000 to 2008

<table>
<thead>
<tr>
<th></th>
<th>Lane County</th>
<th>Eugene</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>$542</td>
<td>$566</td>
</tr>
<tr>
<td>2005</td>
<td>$595</td>
<td>$631</td>
</tr>
<tr>
<td>2006</td>
<td>$614</td>
<td>$640</td>
</tr>
<tr>
<td>2007</td>
<td>$613</td>
<td>$624</td>
</tr>
<tr>
<td>2008</td>
<td>$667</td>
<td>$686</td>
</tr>
</tbody>
</table>

Change 2000 to 2008

<table>
<thead>
<tr>
<th></th>
<th>Amount</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amount</td>
<td>$125</td>
<td>$120</td>
</tr>
<tr>
<td>Percent</td>
<td>23%</td>
<td>21%</td>
</tr>
</tbody>
</table>

Source: U.S. Census 2000 SF3 H56

Figure C-16 shows a comparison of gross rent for renter-occupied housing units in Oregon, Lane County, and Eugene in 2008. Eugene had a larger share of rental units costing less than $600 per month (29%) than the

---

32 The U.S. Census defines gross rent as “The amount of 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 for by the renter (or paid for the renter by someone else).”
State average (23%) and slightly less than the County average (30%). Eugene had a smaller share of rental units costing between $600 to $1,000 per month (45%) than the County average (46%) or the State average (49%).

**Figure C-16. Gross rent, renter-occupied housing units, Oregon, Lane County, and Eugene, 2008**

Vacancy rates have generally decreased in Eugene-Springfield rental market since 2000. Vacancy rates for studio, 1- and 2-bedroom apartments all decreased from between 4.1-4.7% to between 1.1-2.1% between fall 2000 and 2006. Apartment rents have remained relatively stable, increasing between 4% and 10% between 2000 and 2005.\(^{33}\)

Table C-33 shows average monthly cost of rental units in Eugene for the 2000 to 2005 period. Rental units were separated into two categories: (1) units built prior to 1988 and (2) units built since 1988.

Rents increased based on the number of bedrooms. Rents ranged from $396 for a studio unit in 2000 to $967 for a three-bedroom unit in 2005. Rents for units with a similar number of bedrooms were higher for newer units. For instance, the average rental cost of a two-bedroom unit built prior to 1988 was $611 compared to $786 for a two-bedroom unit built since 1988, a difference of $175 per month.

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\(^{33}\) Duncan & Brown Apartment Report, Fall 2000-Fall 2006. Daniel J. Puffinburger, Corey S. Dingman, Duncan & Brown Real Estate Analysts
Over the six-year period, rents increased by between $11 and $63 per month. Monthly costs increased by the greatest amount for newer three-bedroom apartments, rising by $63 per month or 7%. Rental costs for older two-bedroom apartments rose by the greatest amount in terms of percentage, increasing by 9.1% or $52 per month.

Table C-33. Average rental monthly costs by unit type, Eugene, 2000 to 2005

<table>
<thead>
<tr>
<th>Year</th>
<th>Studio</th>
<th>One Bedroom</th>
<th>Two Bedrooms</th>
<th>Three Bedrooms</th>
<th>Studio</th>
<th>One Bedroom</th>
<th>Two Bedrooms</th>
<th>Three Bedrooms</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>$396</td>
<td>$469</td>
<td>$574</td>
<td>$691</td>
<td>--</td>
<td>$655</td>
<td>$763</td>
<td>$904</td>
</tr>
<tr>
<td>2001</td>
<td>$387</td>
<td>$470</td>
<td>$597</td>
<td>$719</td>
<td>--</td>
<td>$627</td>
<td>$764</td>
<td>$909</td>
</tr>
<tr>
<td>2002</td>
<td>$395</td>
<td>$475</td>
<td>$594</td>
<td>$731</td>
<td>--</td>
<td>$670</td>
<td>$798</td>
<td>$895</td>
</tr>
<tr>
<td>2003</td>
<td>$407</td>
<td>$494</td>
<td>$642</td>
<td>$719</td>
<td>--</td>
<td>$682</td>
<td>$795</td>
<td>$918</td>
</tr>
<tr>
<td>2004</td>
<td>$396</td>
<td>$490</td>
<td>$633</td>
<td>$745</td>
<td>$609</td>
<td>$668</td>
<td>$793</td>
<td>$953</td>
</tr>
<tr>
<td>2005</td>
<td>$418</td>
<td>$501</td>
<td>$626</td>
<td>$707</td>
<td>$636</td>
<td>$666</td>
<td>$804</td>
<td>$967</td>
</tr>
</tbody>
</table>

Change 2000 to 2005

<table>
<thead>
<tr>
<th></th>
<th>Amount</th>
<th>Percent</th>
<th>AAGR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Units Built Prior to 1988</td>
<td>$22</td>
<td>5.6%</td>
<td>1.09%</td>
</tr>
<tr>
<td>Units Built Since 1988</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
</tbody>
</table>

Source: Duncan & Brown Apartment Rent Report, 2000 to 2005; Calculations by ECONorthwest
Note: Blank values indicate that there were too few units in the survey to include in the summary.

Table C-34 shows a comparison of average change in average rental costs during the 2000 to 2005 period for Eugene and Springfield. Rental costs were higher in Eugene than in Springfield. The difference in rental costs for all units, regardless when they were built, ranged from $40 per month for a studio unit to $212 per month for a three-bedroom unit, increasing with the number of bedrooms.

The difference in average rental costs was greater for newer and larger units. Newer one-bedroom units cost an average of $76 per month more to rent in Eugene than Springfield. Newer two-bedroom units cost an average of $167 more to rent in Eugene than Springfield.
Table C-34. Comparison of average rental monthly costs over 2000 to 2005 by unit type, Eugene and Springfield

<table>
<thead>
<tr>
<th></th>
<th>Studio</th>
<th>One Bedroom</th>
<th>Two Bedrooms</th>
<th>Three Bedrooms</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Eugene</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Built prior to 1988</td>
<td>$400</td>
<td>$483</td>
<td>$611</td>
<td>$719</td>
</tr>
<tr>
<td>Built since 1988</td>
<td>$623</td>
<td>$661</td>
<td>$786</td>
<td>$924</td>
</tr>
<tr>
<td>All rentals</td>
<td>$456</td>
<td>$572</td>
<td>$699</td>
<td>$822</td>
</tr>
<tr>
<td><strong>Springfield</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Built prior to 1988</td>
<td>$394</td>
<td>$434</td>
<td>$529</td>
<td>$610</td>
</tr>
<tr>
<td>Built since 1988</td>
<td>$550</td>
<td>$569</td>
<td>$620</td>
<td>--</td>
</tr>
<tr>
<td>All rentals</td>
<td>$416</td>
<td>$488</td>
<td>$574</td>
<td>$610</td>
</tr>
<tr>
<td><strong>Difference (Eugene minus Springfield)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Built prior to 1988</td>
<td>$6</td>
<td>$49</td>
<td>$82</td>
<td>$109</td>
</tr>
<tr>
<td>Built since 1988</td>
<td>$73</td>
<td>$92</td>
<td>$166</td>
<td>--</td>
</tr>
<tr>
<td>All rentals</td>
<td>$40</td>
<td>$84</td>
<td>$125</td>
<td>$212</td>
</tr>
</tbody>
</table>

Source: Duncan & Brown Apartment Rent Report, 2000 to 2005; Calculations by ECONorthwest

Note: Blank values indicate that there were too few units in the survey to include in the summary.

Note: This table presents an average of average rental prices for the 2000 to 2005 period.

The analysis of housing starts, sales prices, and rents presented in this section leads us to several conclusions:

- The market has cooled. Eugene’s single-family housing starts have declined since 2006. The overall number of permits for new single-family residences issued region-wide remained remarkably stable until 2007, when they declined;

- Single-family development has dominated new construction. About two-thirds of the permits issued in Eugene were single-family permits.

- The majority of multifamily permits were issued in Eugene. More than two-thirds of multifamily permits in selected Lane County cities were issued in Eugene.

- Sales prices increased much faster than rental rates. Over the eight-year period between 2001 and 2008 average sales price increased by 79%, compared to a 21% change in average rental costs.

The implications of the data shown above are that ownership costs are increasing much faster than rents and incomes. Table C-35 underscores this trend for Eugene. Between 1990 and 2000, incomes increased about 41% while median owner value increased 109%. Rents increased 46%—nearly the same as incomes. Since 2000, the data show housing costs have increased faster than incomes, with a 13% increase in median household income, compared to a 25% increase in median rents and 71% increase in median owner value. Finally, the results show that the median owner value was 2.9 times median household income in 1989—a figure that increased to 6.4 by 2008.
Table C-35. Comparison of income, housing value, and gross rent, Eugene, 1990, 2000, and 2008

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Median HH Income</td>
<td>$25,369</td>
<td>$35,850</td>
<td>$40,456</td>
<td>41%</td>
<td>13%</td>
</tr>
<tr>
<td>Median Family Income</td>
<td>$34,153</td>
<td>$48,527</td>
<td>$57,401</td>
<td>42%</td>
<td>18%</td>
</tr>
<tr>
<td>Median Owner Value</td>
<td>$72,800</td>
<td>$152,000</td>
<td>$260,200</td>
<td>109%</td>
<td>71%</td>
</tr>
<tr>
<td>Median Gross Rent</td>
<td>$425</td>
<td>$621</td>
<td>$779</td>
<td>46%</td>
<td>25%</td>
</tr>
<tr>
<td>Percent of Units Owned</td>
<td>51%</td>
<td>52%</td>
<td>51%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Ratio of Housing Value to Income

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Median HH Income</td>
<td>2.9</td>
<td>4.2</td>
<td>6.4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Median Family Income</td>
<td>2.1</td>
<td>3.1</td>
<td>4.5</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>


Table C-36 compares income, housing value, and gross rent for Lane County in 1990, 2000, and 2008. Between 1990 and 2008, the ratio of housing value/household income grew from 2.6 to 5.7.

Table C-36. Comparison of income, housing value, and gross rent, Lane County, 1990, 2000, and 2008

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Median HH Income</td>
<td>$25,268</td>
<td>$36,942</td>
<td>$43,343</td>
<td>46%</td>
<td>17%</td>
</tr>
<tr>
<td>Median Family Income</td>
<td>$30,763</td>
<td>$45,111</td>
<td>$56,110</td>
<td>47%</td>
<td>24%</td>
</tr>
<tr>
<td>Median Owner Value</td>
<td>$65,500</td>
<td>$141,000</td>
<td>$246,400</td>
<td>115%</td>
<td>75%</td>
</tr>
<tr>
<td>Median Gross Rent</td>
<td>$418</td>
<td>$604</td>
<td>$760</td>
<td>44%</td>
<td>26%</td>
</tr>
<tr>
<td>Percent of Units Owned</td>
<td>61%</td>
<td>62%</td>
<td>63%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Ratio of Housing Value to Income

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Median HH Income</td>
<td>2.6</td>
<td>3.8</td>
<td>5.7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Median Family Income</td>
<td>2.1</td>
<td>3.1</td>
<td>4.4</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>


In summary, the data indicate that homeownership is increasingly expensive in Eugene and that the cost of homeownership is prohibitive for low- and moderate-income households. The purchase price of housing, however, decreased as a result of the current housing market downturn and has continued to do so through 2010. The data indicate that homeownership rates in Eugene and Lane County have increased, despite the rapid increase in sales prices. This is probably due in large part to a much broader array of financing options available to households than existed previously. The future availability of these financing options is unclear, as the local and national housing markets recover from the downturn and recession that started at the end of 2007.
C.4.5 **STEP 5: ESTIMATE THE NUMBER OF ADDITIONAL NEEDED UNITS BY STRUCTURE TYPE**

Step five of the housing needs assessment results in an estimate of need for housing by income and housing type. This requires some estimate of the income distribution of future households in the community. ECO developed these estimates based on (1) secondary data from the Census, and (2) analysis by ECONorthwest.

The next step in the analysis is to relate income levels to tenure and structure type. Table C-2 showed tenure by structure type from the 2007 Census. Table C-37 shows an estimate of needed housing by structure type and tenure for the 2011-2031 planning period. The baseline housing needs analysis assumes that the housing mix will not change over the 20 year planning period, with 61% of single-family detached units and 39% of attached units. The housing needs analysis also assumes that homeownership rates will not change in the future, remaining at 54% owner-occupied and 46% renter occupied.

**Table C-37. Baseline estimate of needed dwelling units by type and tenure, Eugene, 2011-2031**

<table>
<thead>
<tr>
<th>Structure Type</th>
<th>Owner-Occupied</th>
<th>Renter-Occupied</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>New DU</td>
<td>Percent by Type</td>
<td>New DU</td>
</tr>
<tr>
<td>Single-family detached</td>
<td>6,880</td>
<td>82%</td>
<td>1,510</td>
</tr>
<tr>
<td>Single-family attached</td>
<td>289</td>
<td>30%</td>
<td>674</td>
</tr>
<tr>
<td>Two to four units</td>
<td>69</td>
<td>5%</td>
<td>1,306</td>
</tr>
<tr>
<td>Five or more units</td>
<td>151</td>
<td>5%</td>
<td>2,875</td>
</tr>
<tr>
<td><strong>Total dwelling units</strong></td>
<td>7,389</td>
<td>54%</td>
<td>6,365</td>
</tr>
</tbody>
</table>

Source: ECONorthwest
The analysis (Table C-37) indicated that Eugene needs 13,754 new dwelling units that will require new land for the 2011-2031 period. The next step in estimating units by structure type is to evaluate income as it relates to housing affordability. Table C-38 shows an estimate of needed dwelling units by income level for the 2011-2031 period. The analysis uses market segments consistent with HUD income level categories. The analysis shows that about 47% of households in Eugene could be considered high or upper-middle income in 2008 and that about 47% of the housing need in the 2011-2031 period will derive from households in these categories. The analysis also shows that 53% of Eugene’s households could be considered lower-middle, low, or very low income in 2008 and that about 53% of the housing need in the 2011-2031 period will derive from households in these categories.

### Table C-38. Estimate of needed dwelling units by income level, Eugene, 2011-2031

<table>
<thead>
<tr>
<th>Market Segment by Income</th>
<th>Income range</th>
<th>Number of Households</th>
<th>Percent of Households</th>
<th>Financially Attainable Products</th>
</tr>
</thead>
<tbody>
<tr>
<td>High (120% or more of MFI)</td>
<td>$66,600 or more</td>
<td>4,302</td>
<td>31%</td>
<td>All housing types; higher prices</td>
</tr>
</tbody>
</table>
| Upper Middle (80%-120% of MFI) | $44,400 to $66,600 | 2,108 | 15% | All housing types; lower values; new housing
| Lower Middle (50%-80% of MFI) | $27,750 to $44,400 | 2,332 | 17% | Manufactured on lots; single-family attached; duplexes; primarily new housing |
| Low (30%-50% or less of MFI) | $16,650 to $27,750 | 2,194 | 16% | Manufactured in parks; manufactured on lots; apartments |
| Very Low (Less than 30% of MFI) | Less than $16,650 | 2,818 | 20% | None; apartments; new and used government assisted housing |

Source: Analysis by ECONorthwest;  
Number of households by income range from the 2008 American Community Survey, Table B19001  
Income range based on HUD’s 2008 Median Family Income of
C.4.6 BASELINE DENSITY AND MIX FOR NEW HOUSING

This section summarizes the forecast of new housing units in Eugene for the period 2011 to 2031, using baseline assumptions. This forecast of new housing units is a pre-policy forecast and may change as Eugene’s decision-makers consider the characteristics of needed housing for the 20-year period and land use efficiency measures.

This baseline analysis is only partially consistent with the requirement of ORS 197.296(5)(a). However, it uses recent density and mix and does not make a final determination of needed density and mix as required by ORS 197.296(3)(b). That determination will be made as a part of the Envision Eugene process. The analysis in previous sections of this report suggest that affordability gaps exist for lower income households and that the needed density is higher than the achieved density, and the needed mix is for more affordable housing types (less single-family detached and more of other housing types).

The baseline forecast of needed housing units uses the following assumptions, based on recent data:

- **Housing mix** will be the same as the housing stock in 2007: 61% single-family detached, 7% single-family attached, 10% structures with two to four units, and 22% structures with five or more units.

- **Redevelopment rate** will be the same as the redevelopment rate over the 2001 to 2008 period: 8%. This rate was applied to all structure types.

- **Residential density** will be the same as achieved densities over the 2001 to 2008 period: 5.4 dwelling per net acre single-family detached, 20.2 dwelling per net acre single-family attached, 8.6 dwelling per net acre for structures with two to four units, and 24.1 dwelling per net acre for structures with five or more units.

- **The net to gross factor**, which converts from net acres to gross acres, will be 22% based on the average amount of land used for public right-of-ways, infrastructure, and other public uses in residential development during the 2001 to 2008 period.

Table C-39 shows the results. The baseline forecast assumes an average density of 7.3 dwelling units per net acre (about 5.7 dwelling units per gross acre). Based on the mix and density assumptions, Eugene will need about 2,420 gross residential acres to accommodate new housing between 2011 and 2031.
Table C-39. Baseline forecast of new housing by type and density, Eugene, 2011-2031

<table>
<thead>
<tr>
<th>Housing Type</th>
<th>DU Requiring New Residential Land</th>
<th>Percent</th>
<th>Net Acres</th>
<th>Net to Gross Factor</th>
<th>Gross Acres</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Density (DU/net ac)</td>
<td>Net Res. Acres</td>
<td>Gross Res. Acres (DU/gross ac)</td>
</tr>
<tr>
<td>Single-family detached</td>
<td>8,390</td>
<td>61%</td>
<td>5.4</td>
<td>1,554</td>
<td>22%</td>
</tr>
<tr>
<td>Single-family attached</td>
<td>963</td>
<td>7%</td>
<td>20.2</td>
<td>48</td>
<td>22%</td>
</tr>
<tr>
<td>Two to four units</td>
<td>1,375</td>
<td>10%</td>
<td>8.6</td>
<td>159</td>
<td>22%</td>
</tr>
<tr>
<td>Five or more units</td>
<td>3,026</td>
<td>22%</td>
<td>24.1</td>
<td>126</td>
<td>22%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>13,754</strong></td>
<td><strong>100%</strong></td>
<td><strong>7.3</strong></td>
<td><strong>1,887</strong></td>
<td><strong>2,420</strong></td>
</tr>
</tbody>
</table>

Source: ECONorthwest

Table C-40 provides an allocation of housing units by Eugene’s three residential plan designations and commercial plan designations. Dwelling units were allocated to plan designations based, in part, on recent development trends within each plan designation and on the type of development allowed in each plan destination. Table C-40 also provides an estimate of the gross acres required in each designation to accommodate needed housing units for the 2011-2031 period. The acreages are based on the gross density assumptions shown in Table C-39. The residential land needs presented in Table C-40 may change based on policy decisions and land use efficiency measures related to changes in the baseline assumptions, which may result in increased or decreased land need.

Based on the housing needs analysis, dwellings have been allocated by plan designation and type:

- The overall needed housing mix is 61% detached housing types (including accessory dwelling units and manufactured homes) and 39% attached housing types.
- Sixty-three percent of needed dwelling units will locate in the Low Density residential designation, which allows single-family detached, accessory dwelling units, and manufactured homes. This designation also allows duplex, single-family attached, and some multifamily dwellings.
- Seventeen percent of needed dwellings will locate in the Medium Density residential designation, which allows single-family detached, single-family attached, manufactured home parks, townhomes, duplexes, and multifamily dwellings.
- Fifteen percent of needed dwelling units will locate in High Density or Mixed-Use residential designations, which allow single-family detached, townhomes, manufactured (single detached and manufactured home parks), duplexes, and multifamily.
• Five percent of needed dwelling units will locate in commercial plan designations. These units will generally occur in mixed-use developments and in nodal areas.

• Manufactured units in parks will locate in the Low-Density plan designation.

Table C-40. Allocation of new housing units by plan designation, Eugene, 2011-2031

<table>
<thead>
<tr>
<th>Plan Designation</th>
<th>Low Density Residential</th>
<th>Medium Density Residential</th>
<th>High Density Residential</th>
<th>Commercial Designations</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Housing Type</td>
<td>DU</td>
<td>Gross Ac</td>
<td>DU</td>
<td>Gross Ac</td>
<td>DU</td>
</tr>
<tr>
<td>Single-family detached</td>
<td>8,129</td>
<td>1,966</td>
<td>261</td>
<td>26</td>
<td>0</td>
</tr>
<tr>
<td>Single-family attached</td>
<td>165</td>
<td>6</td>
<td>454</td>
<td>35</td>
<td>172</td>
</tr>
<tr>
<td>Two to four units</td>
<td>378</td>
<td>97</td>
<td>756</td>
<td>89</td>
<td>138</td>
</tr>
<tr>
<td>Five or more units</td>
<td>0</td>
<td>0</td>
<td>908</td>
<td>76</td>
<td>1,705</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>8,672</strong></td>
<td><strong>2,069</strong></td>
<td><strong>2,379</strong></td>
<td><strong>226</strong></td>
<td><strong>2,015</strong></td>
</tr>
</tbody>
</table>

Net density (du per acre) 5.4 13.5 31.6 20.8 7.3
Gross density (du per acre) 4.2 10.5 24.6 16.2 5.7

Source: ECONorthwest
Note: Single-family attached dwellings and structures with two to four units in commercial designations are assumed to develop at the density assumptions used for medium density plan designations. Structures with five or more units in commercial designations are assumed to develop at the densities assumed for high density plan designations.

In addition to the housing types shown in Table C-44, Eugene needs to plan for additional group quarters. The analysis assumes the City will add 1,865 persons in group quarters between 2011 and 2031. Assuming that the household size of group quarters is 1.6 persons per household and that group quarters develop at the same density as structures with 5 or more units in High Density Residential, Eugene will need about 47 gross acres of land for group quarters over the 20-year period.

---

34 This household size estimate is based on 2008 American Community Survey data about the number of occupied units with five or more units (17,235 units) and the population living in structures with five or more units (27,925 persons).
C.5 RESIDENTIAL LAND SUFFICIENCY

This section presents an evaluation of the sufficiency of vacant residential land with Eugene’s UGB to accommodate expected residential growth over the 2011 to 2031 period. This section includes an estimate of residential development capacity and a estimate of Eugene’s residential land deficit, based on the analysis in the housing needs analysis. The evaluation of Eugene’s residential land sufficiency may changed based on the discussions that will occur in Envision Eugene, including a determination of Eugene’s needed residential density and mix to meet expected growth over the planning period.

C.5.1 RESIDENTIAL DEVELOPMENT CAPACITY

This section presents a summary of the analysis used to estimate Eugene’s residential development capacity. Appendix G presents a memorandum that discusses the methodology and assumptions used in the capacity analysis in more detail.

Framework for the capacity analysis

The BLI provides a supply analysis (buildable land by type) and the preceding section provides a demand analysis (population and growth leading to demand for more residential development). The comparison of supply and demand allows the determination of land sufficiency.

There are two ways to get estimates of supply and demand into common units of measurement so that they can be compared: (1) housing demand can be converted into acres, or (2) residential land supply can be converted into dwelling units. A complication of either approach is that not all land has the same characteristics. Factors such as plan designation, slope, parcel size and shape, can all affect the ability of land to accommodate housing. Methods that recognize this fact are more robust and produce more realistic results. This analysis uses the second approach: it estimates the ability of vacant residential lands within the UGB to accommodate new housing. This analysis, sometimes called a “capacity analysis,” can be used to evaluate different ways that vacant residential land may buildout by applying different assumptions.

---

There is ambiguity in the term capacity analysis. It would not be unreasonable for one to say that the “capacity” of vacant land is the maximum number of dwellings that could be built based on density limits defined legally by plan designation or zoning, and that development usually occurs—for physical and market reasons—at something less than full capacity. For that reason, we have used the longer phrase to describe our analysis: “estimating how many new dwelling units the vacant residential land in the UGB is likely to accommodate.” That phrase is, however,
Capacity analysis results

The capacity analysis estimates the capacity of vacant residential land to accommodate housing based on actual densities in residential plan designations over the 2001-2008 period, accounting for factors that may limit capacity, such as slopes. The estimated capacity of vacant residential land may change based on the needed density determined as part of the Envision Eugene project.

Table C-41 shows that Eugene’s vacant residential land has capacity to accommodate approximately 8,277 new dwelling units, based on the following assumptions:

- **Vacant land.** Eugene has about 1,679 acres of vacant land in residential plan designations. Vacant land is on slopes ranging from 0% to 30% slope. Undeveloped land on slopes greater than 30% were not considered buildable in the BLI.

- **Recent densities.** Future development will occur at the same densities as development over the 2001 to 2008 period. Development on slopes generally occurred at lower densities than development on flat land.

- **Land for rights-of-way.** The amount of land needed for rights-of-way (e.g., conversion of net acres to gross acres) will depend on the parcel size, ranging from no land needed on lots one acre and smaller, where rights-of-way are already developed, to an average of 22% on lots 5 acres and larger, where rights-of-way will need to be developed.

Table C-41. Estimated housing potential on vacant residential lands, number of dwelling units, Eugene UGB

<table>
<thead>
<tr>
<th>Plan Designation</th>
<th>Slope</th>
<th></th>
<th></th>
<th></th>
<th>30%+ (excluded)</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0%-5%</td>
<td>5%-15%</td>
<td>15%-25%</td>
<td>25%-30%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Low Density Residential</td>
<td>2,061</td>
<td>946</td>
<td>1,319</td>
<td>271</td>
<td>0</td>
<td>4,924</td>
</tr>
<tr>
<td>Medium Density Residential</td>
<td>1,205</td>
<td>403</td>
<td>309</td>
<td>0</td>
<td>0</td>
<td>1,917</td>
</tr>
<tr>
<td>High Density Residential</td>
<td>1,371</td>
<td>46</td>
<td>19</td>
<td>0</td>
<td>0</td>
<td>1,436</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>4,637</strong></td>
<td><strong>1,395</strong></td>
<td><strong>1,647</strong></td>
<td><strong>271</strong></td>
<td><strong>0</strong></td>
<td><strong>8,277</strong></td>
</tr>
</tbody>
</table>

Source: ECONorthwest
Note: lands with over 30% slope were considered unbuildable in the BLI

Table C-42 summarizes the key elements of the capacity analysis. It shows vacant residential acres by plan designation, dwelling unit (DU) potential, and average gross residential density. The capacity analysis uses the average historical densities achieved in each plan designation over the cumbersome, and it is common in Oregon and elsewhere to refer to that type of analysis as “capacity analysis,” so we use that shorthand occasionally in this memorandum.
2001 to 2008 period (shown in Table C-40) but it also considers the topography of vacant land. As a result, the average gross density is 4.9 dwelling units per gross acre, lower than the observed gross residential density of about 5.7 dwelling units per gross acre between 2001 and 2008. This is a function of type of residential acres that are vacant: while the largest portion of vacant land is in the low density residential plan designation, about two-thirds of land in LDR is on slopes of 5% or greater, which reduces the average density in Table C-42, when compared with the observed historical densities used in Table C-40.

In addition, the average gross density for HDR is higher than the observed residential density of structures with more than 5 units per structure, which was about 18.7 dwelling units per gross acre between 2001 and 2008. The average gross density assumed for HDR in Table C-42 is higher (21.3 dwelling units per gross acre) because the highest density developed in HDR.36

<table>
<thead>
<tr>
<th>Plan Designation</th>
<th>Vacant Acres</th>
<th>DU Potential</th>
<th>Average density (DU/Gross Ac)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low Density Residential</td>
<td>1,432</td>
<td>4,924</td>
<td>3.4</td>
</tr>
<tr>
<td>Medium Density Residential</td>
<td>180</td>
<td>1,917</td>
<td>10.7</td>
</tr>
<tr>
<td>High Density Residential</td>
<td>67</td>
<td>1,436</td>
<td>21.3</td>
</tr>
<tr>
<td>Total</td>
<td>1,679</td>
<td>8,277</td>
<td>4.9</td>
</tr>
</tbody>
</table>

Source: ECONorthwest
Note: Average density is derived by dividing the DU potential by the number of vacant acres.
Note: Density assumptions based are on historical densities observed between 2001 and 2008 but are lower than historical densities because about two-thirds of land in LDR is on slopes of 5% or greater, which reduces the average density in Table C-42.
Note: DU is dwelling unit.

The estimates provided in this section are based on analysis of data of the vacant land base and of development that occurred between 2001 and 2008. A typical baseline for any forecast—a starting point for discussion and further modeling using different assumptions—assumes that the future will be like the past. Regarding our analysis, reasons exist to argue otherwise, including (1) the land that developed between 2001 and 2008 is not the land that is available now, (2) the market conditions that existed in the 2001-2008 period do not exist now, and may be different in the future, (3) state and local policy, especially regarding the location and pricing of infrastructure, may change, and (4) external factors may change, some of

36 Residential development in HDR over the 2001 to 2008 period averaged 31 dwelling units per net acre with a net-to-gross factor of 34%.
which (e.g., demographic trends, climate change, energy prices) suggest that the future will trend towards more dense housing. The Envision Eugene process will include two discussions about housing density and mix: (1) a technical discussion about needed density and mix to meet the requirements of ORS 197.296 and (2) decision-makers may consider policy changes that will cause increases in housing density. These changes may show that Eugene’s future growth will be substantially different from historical growth.

C.5.2 RESIDENTIAL LAND SUFFICIENCY

The last step in the analysis of the sufficiency of residential land within the Eugene UGB is to compare the demand for land by Plan Designation (Table C-40) with the capacity of land by Plan Designation (Table C-42). Table C-40 shows that Eugene has demand for 13,066 new dwelling units in residential plan designations (not including demand for 688 dwelling units in commercial plan designations). Table C-42 shows that Eugene has capacity for 8,277 new dwelling units at densities consistent with recent trends, accounting for the topography of vacant land.

Table C-43 shows that Eugene has a deficit of land to accommodate 4,789 new dwelling units.

Table C-43. Comparison of capacity of existing residential land with demand for new dwelling units, Eugene UGB, 2011-2031

<table>
<thead>
<tr>
<th>Plan Designation</th>
<th>Capacity (DU Potential)</th>
<th>Demand for DU</th>
<th>Surplus or Deficit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low Density Residential</td>
<td>4,924</td>
<td>8,672</td>
<td>-3,748</td>
</tr>
<tr>
<td>Medium Density Residential</td>
<td>1,917</td>
<td>2,379</td>
<td>-462</td>
</tr>
<tr>
<td>High Density Residential</td>
<td>1,436</td>
<td>2,015</td>
<td>-579</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>8,277</strong></td>
<td><strong>13,066</strong></td>
<td><strong>-4,789</strong></td>
</tr>
</tbody>
</table>

Source: ECONorthwest
Note: Totals may be off slightly as a result of rounding.
Table C-44 shows the land needed to accommodate the 4,789 new dwelling units needed in Eugene’s UGB over the 20 year planning period. Table C-44 assumes that development will occur at the same densities used in Table C-40. Based on this assumption, Eugene will need 963 gross acres of additional residential land to accommodate new housing over the 2011 to 2031 period.

Table C-44. Deficit of land needed to accommodate new dwelling units, Eugene UGB, 2011-2031

<table>
<thead>
<tr>
<th>Plan Designation</th>
<th>Needed Dwelling Units in Excess of Land Capacity</th>
<th>Density (DU/Gross Acre)</th>
<th>Land Deficit (Gross Acres)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low Density Residential</td>
<td>3,748</td>
<td>4.2</td>
<td>895</td>
</tr>
<tr>
<td>Medium Density Residential</td>
<td>462</td>
<td>10.5</td>
<td>44</td>
</tr>
<tr>
<td>High Density Residential</td>
<td>579</td>
<td>24.6</td>
<td>24</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>4,789</strong></td>
<td></td>
<td><strong>963</strong></td>
</tr>
</tbody>
</table>

Source: ECONorthwest

Note: Totals may be off slightly as a result of rounding.

In addition to the housing types shown in Table C-39, Eugene needs to plan for additional group quarters. The analysis assumes the City will add 1,865 persons in group quarters between 2011 and 2031. Assuming that the household size of group quarters is 1.6 persons per household and that group quarters develop at the same density as structures with 5 or more units in the High Density Residential plan designation, Eugene will need about 47 gross acres of land for group quarters over the 20-year period.

Other uses will consume residential land over the planning period, in addition to the deficit of 963 gross acres shown in Table C-44 and the 47 gross acres of land for group quarters over the 20-year period. Other uses that require residential land are:

37 The density assumptions used in Table C-44 are based on the density assumptions used in Table C-40. They are different from the density assumptions used in the capacity analysis (Table C-42) because the densities used in the capacity analysis account for characteristics of land that is currently designated for residential uses, most notably slope. In contrast, the analysis in Table C-44 makes no assumptions about the characteristics of the land where these dwelling units will be built. Table C-44 assumes that the 4,789 dwelling units will be built on relatively flat, unconstrained ground.

38 This household size estimate is based on 2008 American Community Survey data about the number of occupied units with five or more units (17,235 units) and the population living in structures with five or more units (27,925 persons).
• **Public and semi-public uses.** These uses include schools, parks, public facilities, and semi-public uses (e.g., churches). Public and semi-public land need is discussed in Appendix D.

• **Employment in residential plan designations.** Some employment will locate in residential plan designations. Employment land demand in residential plan designations is discussed in Appendix B.

Table C-45 shows the deficit of residential land by plan designation for new housing, public and semi-public land, and employment land. Table C-45 shows that Eugene has a total deficit of 1,411 gross acres of residential land:

- **Low Density Residential deficit.** Eugene has a deficit of 1,244 acres of Low Density Residential (LDR) land based on the following uses:
  - 895 gross acres of LDR land for new housing
  - 291 gross acres of LDR land for public and semi-public uses, including 160 acres for parkland to address existing need within the UGB
  - 58 gross acres of LDR land to accommodate employment

- **Medium Density Residential deficit.** Eugene has a deficit of 72 acres of Medium Density Residential (MDR) land based on the following uses:
  - 44 gross acres of MDR land for new housing
  - 10 gross acres of MDR land for public and semi-public uses
  - 18 gross acres of MDR land to accommodate employment

- **High Density Residential deficit.** Eugene has a deficit of 94 acres of High Density Residential (HDR) land based on the following uses:
  - 24 gross acres of HDR land for new housing
  - 47 gross acres of HDR land for group quarters
  - 10 gross acres of HDR land for public and semi-public uses
  - 13 gross acres of HDR land to accommodate employment
<table>
<thead>
<tr>
<th>Plan Designation</th>
<th>Land Deficit (Gross Acres)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low Density Residential</td>
<td></td>
</tr>
<tr>
<td>New Housing</td>
<td>895</td>
</tr>
<tr>
<td>Public and Semi-Public Uses</td>
<td>291</td>
</tr>
<tr>
<td>Employment in Residential Plan Designations</td>
<td>58</td>
</tr>
<tr>
<td><strong>Total Low Density Residential</strong></td>
<td><strong>1,244</strong></td>
</tr>
<tr>
<td>Medium Density Residential</td>
<td></td>
</tr>
<tr>
<td>New Housing</td>
<td>44</td>
</tr>
<tr>
<td>Public and Semi-Public Uses</td>
<td>10</td>
</tr>
<tr>
<td>Employment in Residential Plan Designations</td>
<td>18</td>
</tr>
<tr>
<td><strong>Total Medium Density Residential</strong></td>
<td><strong>72</strong></td>
</tr>
<tr>
<td>High Density Residential</td>
<td></td>
</tr>
<tr>
<td>New Housing</td>
<td>24</td>
</tr>
<tr>
<td>Group Quarters</td>
<td>47</td>
</tr>
<tr>
<td>Public and Semi-Public Uses</td>
<td>10</td>
</tr>
<tr>
<td>Employment in Residential Plan Designations</td>
<td>13</td>
</tr>
<tr>
<td><strong>Total High Density Residential</strong></td>
<td><strong>94</strong></td>
</tr>
<tr>
<td><strong>Total Residential Land Deficit</strong></td>
<td><strong>1,410</strong></td>
</tr>
</tbody>
</table>

Source: ECONorthwest
Note: Totals may be off slightly as a result of rounding.
This appendix presents an estimate of public and semi-public land need for the City of Eugene. It is part of a larger project to determine whether Eugene has enough land to accommodate growth over the next 20 years. The estimate of land need presented in this appendix is a pre-policy estimate and will be revised based on feedback from the City Council about economic development policies and City Staff’s work on land use efficiency measures.

D.1 Historical Public and Semi-Public Land Uses

Cities need to provide land for uses other than housing and employment. Public and semi-public facilities such as schools, governments, churches, parks, and other non-profit organizations will expand as population increases. For the purpose of estimating land needed for other uses, these lands are classified into three categories:

- **Land needed for schools.** The 4J and Bethel school districts have plans for new schools by general location within the City and may have plans for selling surplus school properties.

- **Land needed for parks and open space.** This includes all land for park and open space use within the Eugene UGB.

- **Land needed for public operations and facilities.** This includes lands for city offices and maintenance facilities, county facilities, state facilities, federal facilities, and other related public facilities.

- **Lands needed for semi-public uses.** This includes churches, non-profit organizations, and related semi-public uses.

Table D-1 shows land in public and semi-public uses by type of use. Table D-1 shows that in 2008, Eugene had 4,677 acres of public land at an average of 26.6 gross acres per 1,000 people. More than half of public land was Parks and Open Space (2,628 gross acres) and 25% was Public Facilities and Operations (1,174 acres).

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1 In addition to the public and semi-public land uses in Table D-1 the following public uses are also within the UGB: rail (487 acres), roads (about 5,828 acres), or owned by the Bonneville Power Administration (BPA) (200 acres). We assume that Eugene will not have additional needs for rail or BPA lands. Need for roads in newly developed areas are forecast in the employment and residential land analysis, as part of the conversion from net to gross acres.
Table D-1. Summary of public and semi-public land use by type, gross acres, Eugene UGB, 2008

<table>
<thead>
<tr>
<th>Type of Use</th>
<th>Existing Acres (2008)</th>
<th>Acres per 1,000 Persons</th>
<th>Percent of Public Land</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schools</td>
<td>643</td>
<td>3.7</td>
<td>14%</td>
</tr>
<tr>
<td>Parks and Open Space</td>
<td>2,628</td>
<td>14.9</td>
<td>56%</td>
</tr>
<tr>
<td>Public Facilities and Operations</td>
<td>1,174</td>
<td>6.7</td>
<td>25%</td>
</tr>
<tr>
<td>Semi-Public</td>
<td>232</td>
<td>1.3</td>
<td>5%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>4,677</strong></td>
<td><strong>26.6</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>

Source: Portland State University “Population Forecast for Lane County, its Cities, and Unincorporated Area 2008-2035”; City of Eugene Parks Department

Acres per 1,000 people was calculated based on an estimate of population in the Eugene UGB in 2008 of 175,851 people. This estimate was based on the distribution of population within the Eugene-Springfield UGB in the 2010 population forecast, which shows that 72.6% of the Metropolitan Area population will be in Eugene and Metropolitan Area West of Interstate 5. We assumed that 72.6% of the Metropolitan Area’s population in 2008 (242,156 people) were located in Eugene’s UGB in 2008. Note: The number of park and open space acres is based on an inventory conducted by the Eugene Parks Department and is accurate as of 2010.

D.2 PUBLIC AND SEMI-PUBLIC LAND NEEDS

This section summarizes the forecast of needed public and semi-public land in Eugene for the period 2011 to 2031 based on the following assumptions:

- **Parkland** need is based on projects identified in the Parks, Recreation & Open Space (PROS) Project and Priority Plan. This plan was adopted in 2006 and identifies acquisition and development priorities for a population consistent with that identified in ECLA. Parkland need is based on the specific projects identified in this plan. This need is characterized as follows:
  - 1,980 acres of parkland need are identified in this plan. Of this total, 350 are inside the UGB, while the remaining 1,630 are outside the UGB.
  - Of the 350 acres of future parkland need inside the UGB, it is assumed that 15%, or approximately 50 acres will be located on lands identified as “protected” in ECLA. This estimate is based on the approximate location of future parks identified in the Project and Priority Plan and the location of lands currently identified as “protected.”
  - 140 acres of parkland need identified in the plan are already owned by the City, but are located outside the UGB. These areas include the Golden Gardens expansion area and the Santa Clara Community Park. This portion
of the parkland need will not come from existing residential land inside the UGB.

- The parkland need identified in the plan assumes no expansion of the UGB. If new land is brought into the UGB to accommodate residential development, more parkland (especially for neighborhood parks) may be needed to serve that geographic area.

- **School** land needs are based on the estimate of land need provided by the school districts.

  - The 4J School District does not expect to need new land over the 2011 to 2031 period. The School Board has identified four sites (47.9 acres) as surplus: Dunn / Opportunity Center (4.5 acres), Bailey Hill (5.6 acres), Civic Stadium (9.8 acres), and Coburg Farm (28.0 acres). The District may sell, trade, or lease these properties at some time in the future.²

  - The Bethel School District expects to need two sites for future schools: (1) an 80-acre site for a high school and (2) a 40-acre site for a K-8 school. These needs could increase if the City expands the UGB and brings more residential land into the UGB in the School District. The District currently owns an 80-acre site that is located outside but adjacent to the UGB. The Bethel School District does not have surplus property.³

- **Public operations and facilities** may be smaller in the future than the current level of service (6.7 gross acres per 1,000 people) because Eugene already has most of the large public facilities the City is likely to need over the 20-year planning period. Recently built public facilities include: a new Federal building, a new Library, a new site for EWEB facilities, and new fire and emergency facilities. The community may need some new public facilities over the 20-year period: a new police station, a new city hall, and other smaller facilities. In addition, the University of Oregon expects to need an additional 30 acres

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² This information was provided by Barb Bellamy, Communications Director at 4J in an interview on March 12, 2009.

³ This information was provided by Pat McGillivray, Communications Relations for the Bethel School District in an interview on March 12, 2009.
for development over the planning period.\footnote{Christopher Ramey, Associate Vice President at the University of Oregon, said that the University expects to purchase and develop roughly 30-acres over the 20-year planning period.} Table D-2 shows a need for 2.9 acres per 1,000 people or 100 gross acres of land for public operations and facilities (the level observed in 2008 was 6.7 acres per 1000 persons).

In addition, we asked public agencies about surplus land. Lane County, EWEB, and the University of Oregon indicated that they do not have land that they classify as surplus at this time.\footnote{City staff asked staff at public agencies in Eugene about surplus land. Christopher Ramey, Associate Vice President at the University of Oregon, said that the University does not expect to have surplus land over the 20-year planning period. EWEB staff indicate that the agency does not currently have land that is designated as surplus. Staff at Lane County indicate that the County does not currently have plans to surplus County properties, including the Lane County Fairgrounds.}

- **Semi-public uses** need is forecast to be similar to historical needs, at about 1.3 acres per 1,000 people or 45 gross acres over the 20-year period.

### Table D-2. Estimate of existing public and semi-public land, Eugene UGB, gross acres, 2011-2031

<table>
<thead>
<tr>
<th>Type of Use</th>
<th>Assumed Need (Ac/1,000 Persons)</th>
<th>Estimated need (gross acres) 2011-2031</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schools</td>
<td>3.5</td>
<td>120</td>
</tr>
<tr>
<td>4J School District</td>
<td>none</td>
<td>none</td>
</tr>
<tr>
<td>Bethel School District</td>
<td>3.5</td>
<td>120</td>
</tr>
<tr>
<td>Parks and Open Space</td>
<td>NA</td>
<td>300</td>
</tr>
<tr>
<td>Existing land need in the UGB</td>
<td>NA</td>
<td>160</td>
</tr>
<tr>
<td>Golden Gardens and Santa Clara</td>
<td>NA</td>
<td>140</td>
</tr>
<tr>
<td>Public Facilities and Operations</td>
<td>2.9</td>
<td>100</td>
</tr>
<tr>
<td>Semi-Public</td>
<td>1.3</td>
<td>45</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>7.8</strong></td>
<td><strong>565</strong></td>
</tr>
</tbody>
</table>

*Source: 4J and Bethel School Districts, PROS Project and Priority Plan, Lane Council of Governments GIS data*
Conducting a land assessment requires use of jargon, in part, to be consistent with the requirements of Goals 9, 10, and 14, applicable Oregon Administrative Rules (OARs) and Oregon Revised Statutes (ORS) 197.296. The definitions below are taken from work that ECONorthwest has done on similar studies and the definitions provided in OAR 660-007, OAR 660-008, and OAR 660-009. This is not an exhaustive list, but rather an overview of the key or most frequently used terms.

**Buildable Lands Inventory** is an inventory of all land within the urban growth boundary, regardless of plan designation and development status.

**Buildable Residential Land** is residentially designated land within the urban growth boundary, including both vacant and developed land likely to be redeveloped, that is suitable, available and necessary for residential uses. Publicly owned land is generally not considered available for residential uses. Land is generally considered “suitable and available” unless it:

- Is severely constrained by natural hazards as determined under Statewide Planning Goal 7;
- Is subject to natural resource protection measures determined under statewide Planning Goals 5, 15, 16, 17, or 18;
- Has slopes of 30 percent or greater;
- Is within the 100-year floodway; or
- Cannot be provided with public facilities.

**Comparative advantage** is a comparison with other industries within the same city. A city with a demonstrated comparative advantage in an industry has more activity in this industry, relative to other industries, in the City.

**Economic Opportunities Analysis (EOA)** is the analysis required by the State to assess the need for land for employment uses over the next 20-years. The steps in an EOA are described in OAR 660-009-0015.

**Housing mix** is the mixture of single-family, multifamily, and mobile/manufactured dwelling units in a city. Housing mix is expressed as a percentage of each housing type (e.g., 50% single-family, 30% multifamily, and 10% manufactured).
**Housing Needs Analysis** is an analysis of the need for housing and land to accommodate 20-years worth of population growth. The housing needs analysis projects needed housing by housing types and housing density for all income levels within Eugene. The basis for the housing needs analysis is are the requirements in Goal 10, OAR 660-008, and ORS 197.296.

**Housing types** identified in ORS 197.303 are: single-family detached, single-family attached, multifamily (for rental and ownership), mobile or manufactured housing in parks, manufactured housing on lots, and government assisted housing. OAR 660-008 provides definitions for the following housing types:

- **Attached Single Family Housing** is common-wall dwellings or rowhouses where each dwelling unit occupies a separate lot.
- **Detached Single Family Housing** is a housing unit that is free standing and separate from other housing units.
- **Multiple Family Housing** is attached housing where each dwelling unit is not located on a separate lot.

**Industrial and Other Employment Uses** is the phrase describing employment uses in OAR 660-009.

- **Industrial Uses** are employment activities that generate income from the production, handling or distribution of goods. Industrial uses vary from large-scale firms that employ many people and require large amounts of land and natural resources to small-scale firms that employ few people and produce small quantities of specialized goods. The site needs of industrial firms vary from large sites (50 acres or more) located in areas with other industrial firms to medium sites (5 acres) located in commercial areas to home occupations. Examples of industrial uses include: manufacturing; assembly; fabrication; processing; storage; logistics; warehousing; importation; and distribution and transshipment.

- **Other Employment Uses** are all non-industrial employment activities including of retail, services (such as professional services, medical services, social services, and administrative services), non-profit, business headquarters, administrative and government, education, accommodations, recreation and the arts, and food services. The site needs of other employment firms vary from large campus sites or large-scale retail to small sites or offices in existing buildings.
Infill development is residential development that occurs on a tax lot with an existing structure where zoning allows for increases in residential density.

Metropolitan Planning Organization (MPO) is an organization designated by the Governor to coordinate transportation planning on urban land of the State. Eugene belongs to the Central Lane MPO.

Net buildable acre consists of 43,560 square feet of residually designated buildable land, after excluding present and future rights-of-way, restricted hazard areas, public open spaces and restricted resource protection areas.

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

Redevelopment includes redevelopable land and infill land.

Site is parcel or group of parcels of land needed for industrial or other employment uses. A business typically needs one site (regardless of size of the site) per location of the business. For example, a bank may need a one-quarter acre site for a new branch or a food processor may need a 20-acre site for a new production facility.

Site characteristics are attributes of a site necessary for a particular industrial or other employment use to operate. Site characteristics include, but are not limited to, a minimum acreage or site configuration including shape and topography, visibility, specific types or levels of public facilities, services or energy infrastructure, or proximity to a particular transportation or freight facility (e.g., rail or major transportation routes).

Site needs are the aggregate need for land for employment uses in a city for the 20-year planning period.

Short-term land supply is land that is ready for construction within one year of an application for a building permit or request for service extension. Engineering feasibility is sufficient to qualify land for the short-term supply of land and funding availability is not required.

Total land supply is the entire supply of land estimated to be adequate to accommodate employment uses for a 20-year planning period. Total land supply includes the short-term supply of land as well as the remaining
supply of lands considered suitable and serviceable for the industrial or other employment uses identified in a comprehensive plan. Total land supply includes both vacant and developed land.
Numerous people contributed to the completion of ECLA. We would like to acknowledge the hard work of the project Community Advisory Committee, Technical Advisory Committee, and City of Eugene Staff. This project is partially funded by a Department of Land Conservation and Development Technical Assistance Grant.

**Community Advisory Committee**

The Community Advisory Committee (CAC) provided community and business input on ECLA. The CAC provided guidance on numerous topics, including the assumptions used in the baseline analysis, the buildable lands inventory, and guidance on issues of importance to the community. CAC members included: representatives from Eugene committees, natural resource advocates, local business people, development community, City of Eugene appointed official, and residents of Eugene.

- **Jon Belcher**, At-Large
- **Howard Bonnett**, Eugene Sustainability Commission
- **Merle Bottge**, Developed Parks Community
- **Norton Cabell**, Housing Policy Board
- **Paul Conte**, At-Large
- **Rick Duncan**, Eugene Planning Commission Liaison, non-CAC member attendee
- **Kim Hyland**, At-Large
- **Carolyn Jacobs**, Eugene Neighborhood Leaders Council
- **Bill Kloos**, Eugene Area Chamber of Commerce
- **Kevin Matthews**, City-Wide Local Advocacy Group
- **Brent McLean**, Commercial/Retail Community
- **Laura Potter**, Home Builders Association of Lane County
- **Matt Powell**, Eugene Association of Realtors
- **Erik Riechers**, Investment Banking Community
- **Jack Roberts**, Lane Metro Partnership
- **John Winquist**, Natural Resource Community
Agency Technical Advisory Committee

The Agency Technical Advisory Committee (TAC) provided input on numerous topics, including the assumptions used in the baseline analysis, the buildable lands inventory, and guidance on issues of importance to the community. TAC members included school districts, utility provides and City of Eugene staff.

Barb Bellamy, Eugene 4J School District
Neil Bjorklund, City of Eugene Parks and Open Space Division
Savannah Crawford, Oregon Department of Transportation
Terri Harding, City of Eugene Planning Division
Rob Inerfeld, City of Eugene Engineering Division, Transportation
Pat McGillivray, Bethel School District
Ed Moore, Oregon Department of Land Conservation and Development
Jeannine Parisi, Eugene Water and Electric Board
Chris Ramey, University of Oregon
David Reesor, City of Springfield
Stephanie Schulz, Lane County
Tom Schwetz, Lane Transit District
Mike Sullivan, City of Eugene Development Division
Bob Warren, Oregon Economic and Community Development Department

City of Eugene Staff

Numerous City of Eugene staff worked on ECLA.

Jason Dedrick, Project Manager
Neil Bjorklund, Senior Planner
Lisa Gardner, Planning Director
Doug Terra, Senior Planner
Carolyn Weiss, Principal Planner
Kurt Yeiter, Senior Planner

The Entire Planning Division
Consulting Staff

Consulting staff who worked on ECLA were:

ECONorthwest

- **Terry Moore**, Planning Director
- **Bob Parker**, Director and Senior Planner
- **Beth Goodman**, Planner
- **Whit Perkins**, Research Analyst

Lane Council of Governments

- **Bob DenOuden**, Senior Analyst
- **David Richey**, GIS Analyst
- **Nick Seigal**, GIS Analyst
- **Megan Banks**, Senior Planner

The Ulum Group

- **Beverly Mayhew**, Vice-President

Winterbrook Planning

- **Greg Winterowd**, Principal Planner

Strategic Advisors

- **John Brown**, Strategic Advisor
- **Steve Gordon**, Strategic Advisor
This appendix presents two key technical memoranda developed for the Community Advisory Committee (CAC) and the City Council. The information in these memoranda have been incorporated into the land analysis presented in Appendix B (the Economic Opportunities Analysis), Appendix C (the Housing Needs Analysis), and Appendix D (Public and Semi-Public Land Needs). The memoranda are presented in this appendix because they provide additional information and context for the land analysis, which was not presented in other technical appendices. These memoranda are:

- **Baseline Assumptions** memorandum presents information about the key assumptions used in the land analysis.

- **Capacity Analysis** memorandum presents a detailed discussion of the residential capacity analysis methodology, assumptions, and results.
April 14, 2010

TO: Eugene City Council  
CC: Jason Dedrick  
FROM: Terry Moore, Beth Goodman, and Bob Parker  
SUBJECT: ECLA BASELINE ASSUMPTIONS

BACKGROUND

ECONorthwest is conducting the Eugene Comprehensive Lands Assessment (ECLA). Though there are many reasons for conducting such an analysis, the main one directing the content and timing of the analysis is Oregon House Bill 3337, which requires Eugene to establish its own Urban Growth Boundary (UGB) separate from the joint metropolitan UGB that Springfield and Eugene has shared for about 25 years. The full scope of work for ECLA is described elsewhere. It includes creating many products to comply with state requirements for LCDC Goals 9, 10, and 14: a Buildable Lands Inventory (BLI), an Economic Opportunity Analysis (EOA), and a Housing Needs Analysis (HNA).

Those interim products (and others) have resulted in a comparison of estimates of the need / demand for buildable land (to accommodate employment and residential growth) to the estimates of the amount of buildable land for the City of Eugene. That comparison of land need to land supply is the basis for a determination about whether land inside the Eugene portion of the existing metropolitan urban growth boundary is sufficient to accommodate Eugene’s expected growth. That determination is where ECLA will end and Envision Eugene begins. The discussion of how Eugene should develop in the future will occur during the Envision Eugene project, which will model possible future development patterns based on changes in market dynamics and/or changes in development policies. Envision Eugene will focus on discussions about land use efficiency measures (e.g., increasing densities or increasing redevelopment), economic development policies, and other land use issues.

House Bill 3337 requires that Eugene establish a UGB and “demonstrate, as required by ORS 197.296, that its comprehensive plan provides sufficient buildable lands within an urban growth boundary established pursuant to statewide planning goals to
accommodate estimated housing needs for 20 years.” The scope of work for ECLA provides further direction. First, the Eugene City Council expanded the analysis to look not just at residential land (housing needs), but at employment land as well. Second, the scope is about collecting data and making extrapolations of land need based on existing policy and on market conditions and trends; it is not about researching, recommending, or adopting policies that could change those trends.

That last point led to a scope of work for 2008-2009 that is only part of a full UGB evaluation. It makes the analysis sequential rather than simultaneous. It does not work back and forth between estimates of land need, new policies that might change land need (e.g., policies to increase density), and new estimates of land need. Rather, it aims at making a determination of whether recent trends in growth and the type of land development that accommodates that growth (or divergences from those trends based on reasonable expectations about changes in market conditions) would result, over 20 years, in an amount of buildable land consumption that is equal to or less than the amount of buildable land estimated to be in the existing UGB now.

If so, then the City can use that determination to meet the requirements of HB 3337. If not, the City will probably need to do additional work to either (1) identify land-use efficiency measures to accommodate expected growth, (2) expand the UGB, or (3) both. The discussion of land-use efficiency measures or UGB expansion is beyond the scope of this project and beyond 2009. The scope of this project is limited to the collection and assessment of existing data to (1) estimate the existing supply of buildable land inside the Eugene portion of the current UGB, and (2) forecast the need for buildable land based on an extrapolation of recent market trends in the context of existing City policy (or reasonably expected changes in those market trends in the context of existing policy).

If the analysis in this study demonstrates that the City is unlikely have sufficient land within the UGB, that does not mean that the City must expand its UGB. Rather, it means that the City must take another step to make that determination: it must identify, evaluate, and discuss policies it could adopt to reduce the land deficiency. The City’s ultimate determination of whether the UGB needs to be expanded must be done in the context of policies that it will adopt that can reasonably be assumed to reduce the need for that expansion (these policies are referred to collectively as “land-use efficiency measures”). Evaluation of efficiency measures, if required, will occur in 2010 and beyond.

The written products for this project will ultimately comprise dozens of analyses, tables, and maps. Making sense of them as an integrated analysis is difficult enough for people involved in the analysis, and more difficult still for community members who

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1 House Bill 3337 was codified in ORS 197.304. Emphasis added.
want to understand the implications for City land-use policy at a general level. With that point in mind, ECONorthwest proposed in its work plan that the technical information be consolidated and represented in land-use variations. Development of these variations will take place during Envision Eugene, as part of the public discussion of how Eugene may grow over the planning period. ECLA focused on developing a variation that described Eugene’s land need based on recent trends and current policies in land use consumption (referred to as the baseline variation).

The remainder of this memorandum discusses baseline assumptions in the land needs analysis. The framework and analysis that describes the rationale for the information summarized below is in previous memoranda that ECONorthwest presented to the CAC and will be incorporated into the final products for ECLA.

We organize and discuss the baseline assumptions in three categories: those that relate to (1) employment land (commercial and industrial), (2) residential land, and (3) public and semi-public land. For each of the key assumptions we provide some introductory text to explain what the assumption is and how it fits into the needs analysis, and then summarize information under four headings:

- **Potential range of assumption:** What is a reasonable, defensible range, and on what basis is that claim made?
- **CAC and TAC discussion:** What did the ECLA Community Advisory Committee and Technical Advisory Committee have to say about this assumption?
- **Current technical recommendation for baseline assumption:** Given the previous two points, what is this memorandum recommending as the baseline assumption?
- **Data source:** More information about the basis for the recommendation.
**BASELINE ASSUMPTIONS**

Table 1 lists the assumptions that are needed to model land need for the Eugene UGB over the 2011-2031 period; underlining denotes what ECONorthwest believes to be a key assumption. Key assumptions are those that (1) potentially have a large impact on land needs, and (2) are most likely to be affected by City policies. Subsequent sections of this memorandum provide information about baseline assumptions as they relate to historical data.

**Table 1. Baseline assumptions for modeling land need**

<table>
<thead>
<tr>
<th>Employment land needs</th>
<th>Residential land needs</th>
<th>Public and Semi-Public Land Needs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employment growth</td>
<td>Population growth</td>
<td>Park Land</td>
</tr>
<tr>
<td>Share of employment by category</td>
<td>Population in group quarters</td>
<td>Neighborhood Parks</td>
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<td>Industrial</td>
<td>Persons in household</td>
<td>Community Parks</td>
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<td>Commercial</td>
<td>Residential vacancy rate</td>
<td>Natural Areas</td>
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<td>Retail</td>
<td>Housing mix</td>
<td>Other Parks</td>
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<tr>
<td>Government</td>
<td>Housing density</td>
<td>Schools</td>
</tr>
<tr>
<td>New employment in non-employment PD</td>
<td>Residential development in commercial PD</td>
<td>4J School District</td>
</tr>
<tr>
<td>New employment in existing built space</td>
<td>Net to Gross Factor</td>
<td>Bethel School District</td>
</tr>
<tr>
<td>Commercial</td>
<td>Residential redevelopment</td>
<td>Public Operations and Facilities</td>
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<td>Redevelopment</td>
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<td>Employment Density</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Net to Gross Factor</td>
<td></td>
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</tr>
</tbody>
</table>

**EMPLOYMENT LAND NEED: BASELINE ASSUMPTIONS**

The analysis of employment land need is driven by an analysis of employment growth, Eugene’s competitive advantages, the types of firms that may locate in Eugene, and the site needs of the firms that may locate in Eugene. The employment land need must meet the State requirements of Goal 9 and OAR 600-009. The framework and full analysis of employment land need that meets State requirements will be available in the Economic Opportunities Analysis, which will be part of the final report. This section discusses the baseline assumptions necessary for determining the amount of land needed for employment over the 20-year planning period.
EMPLOYMENT GROWTH

Employment growth is the amount of growth in jobs reasonably expected in Eugene over the 2011 to 2031 period. We exclude government employment growth because government land need is accommodated through public and semi-public land needs, evaluated separately. Changes in the forecast of employment growth directly result in changes in need for employment land.

Forecasting employment requires two fundamental assumptions: (1) an estimate of current employment to provide the basis for forecasting future employment and (2) a rate of future employment growth.

- **Employment base.** Eugene had approximately 125,000 employees in 2006. Detailed information about changes in employment in Eugene is not readily available for 2008 or 2009. In the absence of information about the affects of the recession on Eugene, we developed an employment base for Eugene in 2011 based on assumptions, including: (1) Eugene’s employment base shrank by nearly 7,200 jobs as a result of the movement of employees to the new RiverBend Hospital, the closure of Hynix, and as a result of job layoffs in the current recession and (2) Eugene’s job market will not grow during 2009 to 2011. Based on these assumptions, the 2011 employment base will be 116,959 employees located within the Eugene UGB.

- **Forecast rate.** The historical long-term employment growth rate for Eugene is not easily available because the State does not publish employment data by city. It is reasonable to assume that Eugene’s employment grew with employment in Lane County because Eugene’s employment accounted for 60% of employment in Lane County in 2006.

Employment in Lane County grew at 1.7% annually between 1980 and 2007, with an increase of more than 55,300 jobs. Employment growth in the County was slowest during the 1980’s (at 1.5% average annual growth) and fastest during the 1990’s (with 2.1% average annual growth).

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2 The employment forecast is based on the best available data, which is collected by the Oregon Employment Department and modified by LCOG to correct for errors in the data about exactly where in Lane County particular employers were located. The most recently available version of this data is for 2006.

3 We assumed that employment in Eugene decreased proportionate to employment decreases in Lane County.
There is no single “right” way to forecast employment growth. There are, however, two methods for forecasting employment growth that, independent of their technical merits, are legally sanctioned as “safe harbors”\(^4\): (1) assume that employment will grow at the same rate as population (OAR 660-024-0040(8)((a)(ii)), or (2) assume that employment will grow at the same rate as the Employment Department’s forecast for Lane County.

- **Potential range of assumption:** Eugene’s employment growth rate could be expected to be similar to past County growth rates, averaging about 1.7% average annual growth and ranging between 1.5 and 2.1% average annual growth. Applying the safe harbors for employment growth results in lower employment growth rate assumptions. Assuming that employment will grow at the same rate as population (a 0.9% annual growth) results in addition of about 20,000 jobs.\(^5\) Assuming that employment in Eugene will grow at the same rate as the one used in the Employment Department’s forecast for Lane County (a 1.4% annual growth rate) results in the addition of about 34,500 jobs, not including government jobs, which are accounted for in public and semi-public land needs.

- **CAC and TAC discussion:** Several CAC and TAC members said the assumption that Eugene’s employment will grow at the rate forecasted for Lane County (1.4% annual growth) is reasonable, and probably the more reasonable of the two growth rates. Eugene is the central city and employment center of the region: it is reasonable to expect employment to grow faster than population. On the other hand, a difference in growth rates suggests greater commuting to Eugene from outlying cities (e.g., Veneta).

- **Current technical recommendation for baseline assumption:** We recommend assuming 1.4% annual employment growth, based on: (1) the assumption that Eugene is the regional economic center of Lane County and likely to have the greatest employment growth, and (2) average employment growth in Lane County over the 1980 to 2007 was 1.7% average annual growth.

- **Data source:** The employment base is a point in time estimate for 2006 based on: Quarterly Census of Employment and Workforce from the OR Employment Department and Total Employment in Lane County from the US Bureau of Economic Analysis.

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\(^4\) Safe harbors are optional assumptions that satisfy the requirements of Goals 9, 10, or 14. Use of a safe harbor as described in the Oregon Administrative Rules will satisfy the requirement for which the safe harbor is prescribed. A safe harbor is not the only way or necessarily the preferred way to comply with a requirement but correct use of a safe harbor results in an assumption that the DLCD will accept.

\(^5\) This assumption is based on the population forecast for the Eugene UGB presented in the “Lane County Rural Comprehensive Plan General Plan Policies 1984”, updated June 2009. Population in the Eugene UGB is forecast to grow at about 0.88% annually.
DISTRIBUTION OF EMPLOYMENT BY LAND-USE TYPE

The forecast of employment growth can be divided into broad categories of land use based on the characteristics of land needed: commercial office, commercial retail, industrial, and government. In 2006, the share of employment in each of these categories was: 54.3% commercial, 13.1% retail, 18.2% industrial, and 14.4% government.\(^6\)

Note that the effect of this assumption is diminished to some degree by the fact that the amount of employment does not change—the composition changes. Thus, the same number of employees will need built space to work in, which will need land be constructed. The difference is that the density of employment growth will be different for some types of development. But the differences in density among commercial office, retail, and government are relatively small, so shifting among those has little impact on land need. The bigger effect comes from shifts between those categories and industrial, which has lower density.

- **Potential range of assumption:** There is no “correct” way to forecast the future composition of Eugene’s economy. The greatest uncertainty is in estimating the amount of industrial employment will Eugene have in 20 years. Industrial employment, especially manufacturing, declined from 36% of Lane County’s employment in 1980 to 26% of the County’s employment in 2007, consistent with state and national trends. Possible approaches to forecasting the future composition of Eugene’s economy are:
  - Assume the future composition of Eugene’s economy will look like the present and use the existing distribution of employment by land-use type;
  - Assume that employment in non-industrial sectors will grow more than employment in industrial based on County, State, and national recent trends. An example of the shift in the mix: 55% commercial, 15% retail, 15% industrial, and 15% government; or
  - Assume that the amount of industrial employment will be similar to other major cities or counties in the Willamette Valley. Industrial employment accounted for the following share of employment: 19% in Salem and 24% in Portland.\(^7\)

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\(^6\) Growth in government employment is accounted for through the public and semi-public land needs process, rather than through the employment land needs analysis. This assumption accounts for the closing of Hynix, which reduced the share of industrial employment in Eugene.

\(^7\) Mix of employment for Salem and Portland is based on information from Oregon Prospector. Accessed at: http://oregonprospector.com/
Use the mix of employment forecast in the Employment Department’s forecast for Lane County: 46% commercial, 13% retail, 23% industrial, and 18% government.

- **CAC discussion:** Some CAC members said that the current mix of employment seems more likely to continue into the future than the mix in the Employment Department’s forecast for Lane County.

- **Current technical recommendation for baseline assumption:** Given the long-term state and national trends of decreasing share of employment in industrial sectors, especially manufacturing, it seems unlikely that manufacturing employment in Eugene will increase substantially. We recommend using the current mix of employment (54.3% commercial, 13.1% retail, 18.2% industrial, and 14.4% government), given the uncertainty of growth in manufacturing.

- **Data source:** The employment base is a point in time estimate for 2006 based on Quarterly Census of Employment and Workforce from the OR Employment Department and Total Employment in Lane County from the US Bureau of Economic Analysis.

### NEW EMPLOYMENT ACCOMMODATED ON LAND NOT DESIGNATED FOR EMPLOYMENT

Some employment is currently accommodated on land that is located in a residential or other non-employment plan designation. In 2006, about 15% of covered employment was located in residential and other non-employment designations. This includes businesses located in non-employment plan designations (such as a corner store in a neighborhood) and people working from home. This estimate excludes workers that are not covered by unemployment insurance, such as sole proprietors. Although these workers may be more likely than covered employees to locate on land with non-employment designation, we do not have information about where non-covered workers are located. In the absence of this information, we assumed that covered and non-covered workers will locate on land in non-employment plan designations in the same proportions and that 15% of all employment will locate on land in non-employment plan designations.

- **Potential range of assumption:** There is little information available about the amount of employment accommodated on land not designated for employment in Eugene, beyond the data reported above. In work for other Oregon cities, ECO has generally found and assumed that between 10% and

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8 **Covered employment** is employment that the state tracks because it is covered by unemployment insurance and reported. Covered employment information is available at the city-level. **Total employment**, which includes all employment, is tracked by the U.S. Bureau of Labor Statistics and is not available at the city-level. Comparison of covered and total employment in Lane County showed that covered employment was 75% of total employment in the County in 2006. Covered employment excludes sole proprietors and other workers not covered by unemployment insurance.
20% of employment is accommodated in residential or other non-employment plan designations.

- **CAC and TAC discussion:** Some CAC and TAC members suggested that the share of employment accommodated on land not designated for employment uses may increase in the future, based on trends in working from home.

- **Current technical recommendation for baseline assumption:** We recommend assuming that 15% of non-industrial employment will accommodate on land not designated for employment. The basis for this recommendation is that the 2006 covered employment data is the best available and we have little data as a basis for assumptions about changes in the amount of employment that may locate in non-employment designations in the future.

- **Data source:** The estimate of 15% of covered employment on land not designated for employment is based on employment data from 2006. The data source for the employment base was Quarterly Census of Employment and Workforce from the OR Employment Department, overlaid with the LCOG GIS data showing the City of Eugene Plan Designations.

**NEW EMPLOYMENT ACCOMMODATED IN EXISTING BUILT SPACE**

As firms add employees they may fit many of them into existing office spaces. That would occur if current vacancy rates were much higher than average (because future employment growth could then be partially accommodated in existing space until and natural, frictional vacancy rate was reached). It could also occur in occupied buildings through filling vacant cubicles or offices or increasing density of use existing workspaces (e.g., by adding new cubicles). There is no study that quantifies how much employment is commonly accommodated in existing built space over a 20-year period in a city.

- **Potential range of assumption:** There is no data that document the amount of employment locate in existing built space. Clearly some employment is accommodated through this type of intensification of use but, equally clearly, not all employment can be accommodated this way. ECO typically assumes that 5% to 10% of employment will be accommodated in existing built space. Given the current high unemployment rate, it is reasonable to assume that Eugene has greater capacity to accommodate employment growth in existing built space. A range of between 5% to 20% of new employment locating in existing built space is a reasonable assumption.

Obviously, such an assumption cannot apply indefinitely, so it presumes that (1) the use of existing space is not so intense that it cannot be economically increased, and (2) economic conditions, competitiveness, and standard business practices for reducing cost make a 5% to 20% increase in space utilization reasonable.
• CAC and TAC discussion: CAC members’ opinions were divided on this assumption, with CAC members suggesting increasing and decreasing it.

• Current technical recommendation for baseline assumption: We recommend assuming that 10% of new employment will locate in existing built space.

• Data source: ECONorthwest has typically assumed that about 10% of employment would locate in existing built space for similar studies in other cities. The rationale for this assumption is: (1) in the short-term, commercial vacancy rates are likely to be higher than normal (because of the current recession) and (2) existing firms have a large incentive to accommodate new employees in their existing offices because of the cost of moving and leasing additional office space. Given the current high rate of unemployment, it may be reasonable to assume that 20% of employment growth will be accommodated in existing built space.

NEW EMPLOYMENT ACCOMMODATED THROUGH REDEVELOPMENT

Goal 9 strongly encourages cities to develop policies to encourage redevelopment of commercial and industrial land, especially brownfields. Redevelopment is any development that happens on land that has been classified as developed (i.e., not vacant). This definition is consistent with the definition of developed land in OAR 660-009.

For the purposes of this study, we define redevelopment as development that (1) occurs on land with existing development, and (2) results in a net increase in employment density. The second condition means that the replacement of a building used for employment by a new building with similar employment density would not be counted as redevelopment. This definition includes infill on partially vacant land.

We can see that redevelopment has occurred in Eugene over the last 20-years. Retail redevelopment is especially common, such as the redevelopment that has occurred along Coburg Road, like Oakway Center. We can reasonably assume that some employment growth will be accommodated through redevelopment of existing commercial and industrial land over the next 20-years.

Determining how much redevelopment has actually occurred is difficult because data about redevelopment (or indicators of redevelopment) are not maintained. While the City collects data for industrial and commercial building permits, there is no way to determine which of these permits was issued for redevelopment of a site, short of sorting through the permits one-by-one. We could estimate redevelopment using assumptions about land value and potential to redevelopment, this methodology provides a gross indicator of redevelopment potential but little indication of how much redevelopment is likely to occur over the planning period.
As a result, we do not have a factual basis to estimate the amount of employment growth that may be accommodated through redevelopment. In previous studies conducted by ECONorthwest and other organizations, redevelopment has been addressed by assuming that a certain percentage of employment growth will be addressed through redevelopment, generally from 5% to 20% of new residential development.9

- **Potential range of assumption:** We found no studies or data that attempt to estimate the amount of commercial and industrial infill and redevelopment that occurred in Eugene over the past decade. It is clear, however, that infill and redevelopment occurred, especially along Coburg Road. A 2002 study in the Portland Metro area suggested that about 50% of commercial and 35% of industrial of employment land would be accommodated through redevelopment over the 2002-2022 period.10

- **CAC and TAC discussion:** CAC and TAC did not discuss this assumption in great enough depth to have suggestions for different assumptions from more than one committee member. One TAC member suggested that the most appropriate places for redevelopment are in mixed use centers and downtown.

- **Current technical recommendation for baseline assumption:** Our preliminary recommendation is to assume redevelopment of 10% of forecast industrial employment, 15% of commercial employment, and 35% of retail employment.

- **Data source:** No data about commercial and industrial redevelopment is currently available.

**EMPLOYMENT DENSITY**

Employment density is the density of employment (measured in employees per acre) locating in commercial and industrial plan designations. Forecasting employment land need based on forecasts of employment growth requires a conversion, either explicit or implicit, of employment growth (number of new employees) to land need based on assumptions about employment density. This can be accomplished through use of assumptions about the number of employees per acre (EPA). In 2006, Eugene’s overall employment density was 22 employees per acre. Employment densities in Eugene varied by use and mixture of uses, as follows:

- **Industrial** densities ranged from about 5 employees per gross acre (EPA) in heavy industrial areas to nearly 20 EPA in light or campus industrial.

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9 ECONorthwest used this method in studies for the following cities: Ashland, McMinnville, The Dalles, Pendleton, Ontario, and Sandy. Metro uses a “refill” rate to account for employment accommodated through redevelopment. In Metro’s 2002 Urban Growth Report, they assumed a refill rate of about 26% for commercial and industrial lands.

• **Commercial** densities varied from 30 EPA in mixed retail and office sites to 93 EPA in downtown.

• **Retail** densities varied from about 20 EPA to about 37 EPA at Oakway Center.

Existing employment densities are documented more completely in the memorandum to the CAC “Preliminary Estimate of Employment Land Need in Eugene During the 2010-2030 Period” (dated February 5, 2009).

• **Potential range of assumption:** The potential ranges of assumptions are described above.

• **CAC and TAC discussion:** CAC and TAC did not have many comments or questions about the employment density data presented.

• **Current technical recommendation for baseline assumption:** We recommend making the following assumptions about employment density, based on the average densities in Eugene: 13 EPA for industrial, 68 EPA for commercial, and 23 EPA for retail.

• **Data source:** Employment densities are based on employment in 2006 from the Quarterly Census of Employment and Workforce from the OR Employment Department, City of Eugene Plan Designations, and LCOG GIS data about land in employment plan designations.

**CONVERTING NET ACRES TO GROSS ACRES**

The data about employment density presented above is in net acres, which does not include land for public right-of-way. Future land need for employment should include land in tax lots needed for employment plus land needed for public right-of-way. One way to estimate the amount of land needed for employment including public right-of-way is to convert from net to gross acres based on assumptions about the amount of land needed for right-of-way.\(^{11}\) A net to gross conversion is expressed as a percentage of gross acres that are in public right-of-way. For example, a net to gross conversion factor of 15% means that 15% of gross acres are in public rights-of-way.

• **Potential range of assumption:** We examined net to gross ratios for existing commercial and industrial development on selected sites within Eugene. We found the following net to gross factors:

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\(^{11}\) OAR 660-024-0010(6) uses the following definition of net buildable acre. “Net Buildable Acre” consists of 43,560 square feet of residually designated buildable land after excluding future rights-of-way for streets and roads. While the administrative rule does not include a definition of a gross buildable acre, using the definition above, a gross buildable acre will include areas used for rights-of-way for streets and roads. Areas used for rights-of-way are considered unbuildable.
Commercial sites had a net to gross factor ranging from: about 17% in community retail centers, 31% in Downtown, and 34% in the area directly south of Downtown Eugene.

Industrial sites had a net to gross factor averaging about 14%, with no substantial different between light and heavy industry.

Work with other cities has shown similar net to gross factors. ECO typically assumes a net to gross factor of 15% to 20% for employment lands.

- **CAC and TAC discussion:** CAC and TAC did not provide comments on the net-to-gross factor.

- **Current technical recommendation for baseline assumption:** We recommend assuming a 20% net-to-gross factor for commercial land need, based on the assumption that future commercial employment will be in areas more like community retail centers and less like Downtown. These areas will need less land for public rights-of-way.

  We recommend assuming a 15% net-to-gross factor for industrial land need, which is consistent with observed need for public rights-of-way in industrial areas in Eugene.

- **Data source:** The net-to-gross factors are based on data from the 2006 Quarterly Census of Employment and Workforce from the OR Employment Department and City of Eugene Plan Designations. This assumption is generally consistent with the assumptions in the MetroPlan about land needed for public rights-of-way.

### Residential Land Need: Baseline Assumptions

The analysis of residential land need is driven by an analysis of housing need. The housing needs analysis must meet the State requirements of Goal 10, ORS 197.296, and OAR 600-008. The framework and full analysis of employment land need that meets State requirements will be available in the Housing Needs Analysis, which will be part of the final report. This section discusses the baseline assumptions necessary for determining the amount of land needed for housing over the 20-year planning period.

The housing needs analysis presents information about residential development by housing types. There are multiple ways that housing types could be grouped. For example, housing types could be grouped by: (1) structure type (e.g., single-family detached, apartments, etc.), (2) tenure (e.g., distinguishing unit type by owner or renter units), (3) housing affordability (e.g., units affordable at given income levels) or (4) some combination of these categories. There are probably other ways to group housing types.
For the purposes of this study, we grouped housing types based on: (1) whether the structure is stand-alone or attached to another structure and (2) the number of dwelling units in each structure. The housing types used in this analysis are:

- **Single-family detached** includes single-family detached units, secondary dwelling units, and manufactured homes on lots and in mobile home parks.
- **Single-family attached** includes row houses, townhouses, and condominiums.
- **Two to four units** includes structures with two to four dwelling units, such as duplexes, tri-plexes, and quad-plexes.
- **Five or more units** includes structures with five or more dwelling units per structure.

The reason for choosing these categories of housing type for the analysis is that the City collects data about residential development based on these structure types.

Using these structure types to forecast need for new housing does not provide information about housing issues that elected officials may want to consider. Two examples of housing types that are not shown in this categorization of housing types are:

- **Larger than average student households.** Recent development trends in neighborhoods near the University have included student housing that have higher than average household size. These structures may have three or four dwelling units per structure but each dwelling unit may have four or more bedrooms. These housing types affect the surrounding neighborhood differently than units with smaller household sizes, such as by potentially generating higher demand for parking spaces than units with fewer persons per unit.

- **Affordable, small single-family units.** The housing needs analysis discusses the need for affordable housing, both for homeownership and rental housing. Small single-family units in established neighborhoods are one example of affordable ownership units. These units may be located in established neighborhoods where redevelopment is occurring, decreasing the availability of these housing types.

These issues are discussed in the housing needs analysis, where data is available about these housing types.
POPULATION GROWTH

A 20-year population forecast (in this instance, 2011 to 2031) is the foundation for estimating needed new dwelling units. If Lane County did not have an adopted population forecast, we would need to consider a reasonable range of population growth. Lane County, however, adopted a new coordinated population forecast that covers the 2010 to 2035 period. The City has taken action on a Metro Plan Amendment to formally adopt this forecast for use in all future planning efforts and is awaiting similar action by Springfield and Lane County. The forecast projects that population inside the Eugene UGB will grow from 179,338 people in 2011 to 213,238 people in 2031, an increase of 33,900 people between 2011 and 2031.12

- **Potential range of assumption:** The adopted Lane County population forecast is the only assumption about population growth currently under consideration in ECLA.

- **CAC and TAC discussion:** CAC and TAC were not asked for different assumptions about population growth because this is a policy decision based on the Lane County coordinated population forecast, which the City Council has adopted as a Metro Plan Amendment.

- **Current technical recommendation for baseline assumption:** We recommend using the Lane County population forecast for Eugene.

- **Data source:** Lane County adopted coordinated population forecast, *Lane County Rural Comprehensive Plan*, updated June 2009.

POPULATION IN GROUP QUARTERS

Persons in group quarters do not consume standard housing units; thus, any forecast of new people in group quarters is typically backed out of the population forecast for the purpose of estimating housing demand. Group quarters can have a big influence on housing in cities with colleges (dorms), prisons, or a large elderly population (nursing homes). In general, any new requirements for these housing types will be met by institutions (colleges, government agencies, health-care corporations) operating outside what is typically defined as the housing market. Group quarters, however, require land and are typically built at densities that are comparable to multiple-family dwellings.

The U.S. Census tracks the number of people in group quarters. The share of Eugene’s population living in group quarters was 5.5% in 1990, 4.4% in 2000, and 5.3% in 2007.

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12 The population forecast is from Table 1.1 in the revised *Lane County Rural Comprehensive Plan General Plan Policies 1984*, updated June 2009.
One of the factors that will affect the amount of Eugene’s population housed in group quarters is enrollment growth at the University of Oregon and the University’s provision of dormitory space. The University projects growth of about 3,700 students over the 2009 to 2019 period (from 20,300 students in 2009)\(^\text{13}\) and plans to build an additional approximately 1,500 bed spaces over the 2007 to 2017 period.\(^\text{14}\)

- **Potential range of assumption:** The U.S. Census’ range of people in group households (between 4.4% to 5.5% of population) is a reasonable range for this assumption. There are two main factors that may affect the share of population in group quarters: (1) the aging population and (2) growth in the University of Oregon’s student body.
  
  - The aging of the population may result in an increase in share of seniors living in group housing, especially nursing homes. Housing types for the aging population range from congregate facilities (e.g., assisted living) to age restricted active adult retirement communities, which have a range of single-family and multifamily housing types. The age and health of seniors impact the their housing choice. Younger, independent seniors have a preference for aging in place or choose housing that allows them greater independence, such as age restricted communities. As seniors age or their health deteriorates, housing choices may include assisted living facilities and nursing homes. It is difficult to estimate how much the aging of the population and greater housing choice for seniors will affect the share of population in group quarters.
  
  - Growth in the University of Oregon’s student population may result in an increase in the share of population in group quarters. The affect of growth in the student body at the University on the share of Eugene’s population in group quarters will depend on actual growth in the student body and whether the University builds as much student housing as has been proposed. If the University builds as much housing as proposed, it may result in an increase in population in group quarters, which would result in a decrease in need for new housing units.

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• **CAC and TAC discussion:** Some CAC members have expressed concern that the assumption account for growth in the student population at the University of Oregon and the University’s plans for building additional dorm rooms.

• **Current technical recommendation for baseline assumption:** We recommend assuming that 5.3% of Eugene’s 2031 population (1,865 people) will live in group quarters.

• **Data source:** The assumption about population in group quarters is based on the share of Eugene’s population in group quarters in 2007 according to the U.S. Census, American Community Survey, 2007. This assumption considers long-term trends in share of population in group quarters in 1990, 2000, and 2007, based on U.S. Census data in those years.

**PERSONS PER HOUSEHOLD**

In 1990, traditional families (married couple, with one or more children at home) accounted for 25% of all households in Oregon. In 2007 that percentage had dropped to 20%. Consistent with that trend, the average household size has decreased over the past five decades and is likely to continue decreasing. The average household size in Oregon was 2.60 in 1980, 2.52 in 1990, and 2.51 in 2000 and 2.49 in 2007. One and two person households made up the majority of Oregon households in 1990. The direct impact of decreasing household size on housing demand is that smaller households means more households, which means a need for more housing units even if population were not growing.

Average household size in Eugene followed the same pattern as the State: household sizes have decreased. In 1990, the average household had 2.30 persons per household, dropping to 2.27 in 2000, and 2.25 persons per household in 2007. OAR 660-024 established a “safe harbor” assumption for average household size—which is the figure from the most recent Census.

• **Potential range of assumption:** We could assume that household sizes will change over the planning period or we could use the safe harbor and assume that household sizes will continue at 2.25 persons per household.

The historical change in household size in Eugene over the last quarter-century is a relatively slow decrease: from 1980 to 2007 the average annual rate of decrease was on the order of 1/10th of 1% per year. If Eugene’s household size continues to decrease, Eugene will need more dwelling units than the current forecast projects to accommodate Eugene’s expected population growth.

Trends in student housing suggest that Eugene’s household size may increase slightly over the planning period. One type of student housing that has been built more frequently in Eugene are large units with five or more bedrooms and shared common space and kitchen facilities. These dwellings are most
common in neighborhoods near the University and may have five or more students living in them. While it seems that the market for this type of housing is limited by student housing demand and student housing preferences, continued growth in this type of housing could increase average household size slightly across the City. The result of increased household size would be a decrease in the number of new dwelling units needed to accommodate Eugene’s expected population growth.

• **CAC and TAC discussion:** Some CAC members think that we should assume that household sizes will change in the future. CAC members have expressed concern at development of buildings with an increasing number of bedrooms in the same dwelling unit. This creates higher persons per household in the neighborhoods with this type of development, which creates other policy challenges for these neighborhoods (e.g., parking demand). Other CAC members identified this as a trend localized around the University, which would not significantly impact household size across the City. The housing needs analysis will discuss this trend.

• **Current technical recommendation for baseline assumption:** We recommend using the safe harbor assumption that household sizes will remain at 2.25 persons per household. Forecasting future household sizes requires considering a number of demographic and social shifts that are complex: continued aging of the population, changes in ethnicity, and changes in student housing preferences. The changes in household size from these factors may cancel each other out or may affect household size in specific areas of the City.

• **Data source:** The assumption about household size is based on a point in time estimate based on 2007 U.S. Census, American Community Survey, data.

**RESIDENTIAL VACANCIES**

Housing vacancy rates are cyclical. Low vacancy rates signal an excess of demand relative to supply, which brings new construction and, eventually, higher vacancy rates. Vacancy rates for rental and multiple family units are typically higher than those for owner-occupied and single-family dwelling units.

In 1990 the Census reported a vacancy rate for all housing of 3.6%, increasing to 5.4% in 2000, and 6.3% in 2007. While it may appear that Eugene’s vacancy rate has increased over the 1990 to 2007, Eugene’s vacancy rate has probably fluctuated throughout each year. The Census’ vacancy rate data is accurate for the date of the Census (April 1) but the vacancy rate may change significantly throughout the year based on activities at the University of Oregon. For example, Eugene may have a higher vacancy rate in July, when most students have left town, and a lower vacancy rate in October, with the start of the University’s school year.
Since state law and this project requires a 20-year forecast, and one should expect several housing cycles during that period, this project should be looking for an average vacancy rate (the “natural” rate of vacancy). OAR 660-024 established a “safe harbor” assumption for average residential vacancies—which is the figure from the most recent Census.

- **Potential range of assumption:** Census data probably describes a reasonable range of vacancy rates: 3.5% to 6.5% vacancy. ECO has typically found vacancy rates of 2% to 9% in other cities, depending on the type of housing and local housing market conditions.

- **CAC and TAC discussion:** Several CAC members agreed the most reasonable vacancy rate assumption would be 5%. That is an average rate that ECO has used in other studies of this type.

- **Current technical recommendation for baseline assumption:** We recommend assuming that an average of 5% of new dwellings will be vacant, based on recent vacancy data and suggestions from the CAC.

- **Data source:** The assumption about vacancy rate is based on a point in time estimate for 2007 from the U.S. Census, American Community Survey.

### HOUSING MIX

Housing mix is the mixture of housing (structure) types (e.g., single-family detached or apartments) within a city. State law requires a determination of the future housing mix in the community and allows that determination to be based on different periods: (1) the mix of housing built in the past five years or since the most recent periodic review, whichever time period is greater, (2) a shorter time period if the data will provide more accurate and reliable information, or (3) a longer time period if the data will provide more accurate and reliable information (ORS 197.296). This memorandum presents housing mix data for two periods (1) housing mix over the 2001 to 2008 period and (2) housing mix over the 1990 to 2007 period.

Table 2 shows the housing mix for residential development over the 2001 to 2008 period. We selected this time period over the 2001 to 2008 period because it shows housing mix that occurred since the City’s revised zoning ordinance went into effect in 2001. About 69% of housing developed was single-family detached (including manufactured homes), 10% was single-family attached, and the remaining 21% were structures with two or more units. The share of single-family housing varied from a high of 90% in 2003 to a low of 45% in 2007.

A caveat about the information presented in Table 2: the data about residential development is both complex and somewhat scant. Each development may have idiosyncrasies, such as factors that limit development density or footprint (such as a stream). Moreover, it is typical to see cycles in building: for example, a lot of single-family units get built so then a lot of multifamily follows. We think it is more
appropriate to look at building trends broadly and on average over a several-year period (e.g., for the entire 2001 to 2008 period) than on a year-by-year basis.

**Table 2. Percent of housing by structure type, 2001-2008, Eugene UGB**

<table>
<thead>
<tr>
<th>Year</th>
<th>Single-family detached</th>
<th>Single-family attached</th>
<th>Two to four units</th>
<th>Five or more units</th>
</tr>
</thead>
<tbody>
<tr>
<td>2001</td>
<td>86%</td>
<td>2%</td>
<td>4%</td>
<td>8%</td>
</tr>
<tr>
<td>2002</td>
<td>85%</td>
<td>0%</td>
<td>4%</td>
<td>11%</td>
</tr>
<tr>
<td>2003</td>
<td>90%</td>
<td>1%</td>
<td>7%</td>
<td>1%</td>
</tr>
<tr>
<td>2004</td>
<td>67%</td>
<td>1%</td>
<td>4%</td>
<td>28%</td>
</tr>
<tr>
<td>2005</td>
<td>68%</td>
<td>4%</td>
<td>7%</td>
<td>21%</td>
</tr>
<tr>
<td>2006</td>
<td>52%</td>
<td>36%</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>2007</td>
<td>45%</td>
<td>26%</td>
<td>9%</td>
<td>19%</td>
</tr>
<tr>
<td>2008</td>
<td>54%</td>
<td>1%</td>
<td>5%</td>
<td>40%</td>
</tr>
<tr>
<td><strong>Average</strong></td>
<td><strong>69%</strong></td>
<td><strong>10%</strong></td>
<td><strong>6%</strong></td>
<td><strong>15%</strong></td>
</tr>
<tr>
<td><strong>Total Units</strong></td>
<td><strong>4,503</strong></td>
<td><strong>660</strong></td>
<td><strong>371</strong></td>
<td><strong>998</strong></td>
</tr>
</tbody>
</table>

Source: LCOG GIS data and City of Eugene Planning Department, 2008

Table 3 shows changes in the mix of Eugene’s housing stock (all housing in the City) between 1990 and 2007, based on U.S. Census data. The share of single-family detached housing (including manufactured) was relatively stable over the seventeen-year period, accounting for about 61% of housing stock in Eugene.

**Table 3. Housing stock by structure type, Eugene city limits, 1990, 2000, and 2007**

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Single-family detached</td>
<td>28,768</td>
<td>60%</td>
<td>36,151</td>
<td>59%</td>
<td>41,923</td>
<td>61%</td>
<td>13,155</td>
<td>63%</td>
<td>46%</td>
</tr>
<tr>
<td>Single-family attached</td>
<td>3,264</td>
<td>7%</td>
<td>4,011</td>
<td>7%</td>
<td>4,828</td>
<td>7%</td>
<td>1,564</td>
<td>7%</td>
<td>48%</td>
</tr>
<tr>
<td>Two to four units</td>
<td>4,886</td>
<td>10%</td>
<td>5,677</td>
<td>10%</td>
<td>6,773</td>
<td>10%</td>
<td>1,087</td>
<td>9%</td>
<td>39%</td>
</tr>
<tr>
<td>Five or more units</td>
<td>11,073</td>
<td>23%</td>
<td>15,293</td>
<td>25%</td>
<td>15,371</td>
<td>22%</td>
<td>4,298</td>
<td>21%</td>
<td>39%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>47,991</strong></td>
<td><strong>100%</strong></td>
<td><strong>61,332</strong></td>
<td><strong>100%</strong></td>
<td><strong>68,895</strong></td>
<td><strong>100%</strong></td>
<td><strong>20,904</strong></td>
<td><strong>100%</strong></td>
<td><strong>44%</strong></td>
</tr>
</tbody>
</table>


Several CAC members have expressed concerns about the categories of housing shown in Tables 2 and 3. Suggestions for changes to mix include: (1) combine some categories of structure type, such as apartments with 5 to 19 units and apartments with 20 or more units and (2) consider other structure types, such as student housing with more than four bedrooms and shared common areas or small affordable single-family dwellings. ECONorthwest addressed this first consideration and consolidated the housing types as presented in this memorandum. Data about the other structure types is not commonly available across the City. The housing needs analysis will discuss these housing types and present available data for these housing types.
Potential range of assumption: The range of assumptions about future housing mix is broad. The range of assumptions could be as broad as the changes in mix shown in Table 2, with single-family detached housing varying from 45% to 64%. A more reasonable range of assumptions for the baseline analysis could be taken from the average mix over the 2001 to 2008 period or from the 2007 mix. The mixes are as follows:

<table>
<thead>
<tr>
<th>Mix for housing built from 2001 to 2008</th>
<th>Mix of housing stock in 2007</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single-family detached: 69%</td>
<td>Single-family detached: 61%</td>
</tr>
<tr>
<td>Single-family attached: 10%</td>
<td>Single-family attached: 7%</td>
</tr>
<tr>
<td>Two to four units: 6%</td>
<td>Two to four units: 10%</td>
</tr>
<tr>
<td>Five or more units: 15%</td>
<td>Five or more units: 22%</td>
</tr>
</tbody>
</table>

The City Council could consider alternative housing mixes. State policy provides guidance for determining housing mix in the Portland Metro UGB and provides a safe harbor for determining housing mix.

- OAR 660-007 requires that cities of 50,000 or more people in the Portland Metro UGB assume that 50% of new residential construction will be single-family detached housing types (including manufactured housing) and 50% multifamily housing types (including all housing attached housing where each dwelling unit is not on a separate lot). Although OAR 660-007 does not apply to Eugene (because the City is not in the Portland Metro UGB), this rule does illustrate the housing mix that cities in the Metro UGB are expected to achieve.

- OAR 660-024-0040(f) provides an optional safe harbor for cities that are not subject to ORS 197.296 and have at least 25,000 residents. This safe harbor assumes that 50% of future housing will be in low density plan designations and that 50% will be in medium and high density plan designations. This safe harbor could be interpreted as resulting in a housing mix of roughly 50% single-family detached housing types and 50% multifamily housing types. Although this safe harbor does not apply to Eugene (because the City is subject to ORS 197.296), this rule does illustrate the housing mix that cities with 25,000 or more people are encouraged by the State to achieve.

CAC and TAC discussion: Discussions with the CAC indicate that they favor assuming that the housing mix that Eugene will achieve over the planning period is the mix for Eugene’s housing stock in 2007. CAC members are concerned that the housing mix achieved over the 2001 to 2008 period was anomalous, with development of more single-family detached housing than Eugene can reasonably expect over the next 20 years. CAC members generally agreed that future housing mix will more closely resemble the mix of the City’s housing stock.
- **Current technical recommendation for baseline assumption:** We recommend basing Eugene’s forecasted housing mix on the mix of housing stock in 2007.

- **Data source:** The assumption about housing mix could be based on development trends over the 2001 to 2008 period, based on LCOG GIS data and City of Eugene Planning Department’s building permit data. Alternatively, assumption about housing mix could be based on the housing mix for Eugene’s housing stock, shown in point in time estimates for 1990, 2000, and 2007 from the U.S. Census.

## HOUSING DENSITY

Housing density is the density of housing by structure type, expressed in dwelling units per net or gross acre.\(^{15}\) Like housing mix, State law requires determination of housing density based on analysis of data and suggests using analysis of housing density developed over the past five years or since the most recent periodic review, whichever time period is greater, or for a shorter or longer time period.

The U.S. Census does not track residential development density. City staff recommends using housing density based on development between 2001 and 2008 (rather than 1999 to 2008) because changes to the City’s zoning code went into effect in 2001 that affect housing development. Eugene City staff concluded that data prior to 1996 is not accurate and consistent enough for an analysis of longer-term housing densities.

City staff ground-truthed the density analysis results through review of aerial photos, review of RLID and GeoDart address files and a review of relevant permit data. Staff found that the density analysis did not account for phased development of multifamily housing (structures with more than two units) in Medium and High Density Plan Designations. Phased development often occurs over a number of years and may include developing multiple types of housing on the same tax lot. As a result, the density analysis did not account for pre-existing multifamily development on some tax lots, which resulted in an underestimate of multifamily housing Medium and High Density Plan Designations. Phased development over multiple years on one tax lot does not generally occur in Low Density Residential or with single-family housing.

Table 4 shows average net residential development by structure type for the 2001 to 2008 period. Table 4 shows that 4,727 tax lots had residential development during the 2001 to 2008 period, adding 6,532 new dwelling units. Some tax lots had pre-existing development.

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\(^{15}\) OAR 660-024-0010(6) uses the following definition of net buildable acre. “Net Buildable Acre” consists of 43,560 square feet of residually designated buildable land after excluding future rights-of-way for streets and roads. While the administrative rule does not include a definition of a gross buildable acre, using the definition above, a gross buildable acre will include areas used for rights-of-way for streets and roads. Areas used for rights-of-way are considered unbuildable.
multifamily dwelling units. The average density for all residential development over the 2001 to 2008 period was 7.2 dwellings per net acre.  

Table 4. Average development density by structure type, dwelling units per net acre, 2001-2008, Eugene UGB

<table>
<thead>
<tr>
<th>Structure Type</th>
<th>Tax Lots</th>
<th>Dwelling Units on Lots with Development between 2001-2008</th>
<th>Net Acres</th>
<th>DU/Net Ac</th>
</tr>
</thead>
<tbody>
<tr>
<td>Multifamily built prior to 2001</td>
<td>NA</td>
<td>4,503</td>
<td>837</td>
<td>5.4</td>
</tr>
<tr>
<td>All DU Built 2001 to 2008</td>
<td>660</td>
<td>4,503</td>
<td>33</td>
<td>20.2</td>
</tr>
<tr>
<td>Total</td>
<td>1,410</td>
<td>7,019</td>
<td>59</td>
<td>24.1</td>
</tr>
</tbody>
</table>

Table 5 shows average development density by Comprehensive Plan Designation and structure type for the 2001 to 2008 period. Table 5 shows that residential density varied by plan designation and structure type. About 66% of new development occurred in Low Density Residential, 19% in Medium Density Residential, 15% in High Density Residential, and the remaining less than 1% occurred in a mixed use designation.

Table 5. Average development density by Comprehensive Plan Designation and structure type, dwelling units per net acre, 2001-2008, Eugene UGB

<table>
<thead>
<tr>
<th>Plan Designation</th>
<th>Single-family detached</th>
<th>Single-family attached</th>
<th>Structures with 2 to 4 units</th>
<th>Structures with 5 or more units</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low Density Residential</td>
<td>5.2</td>
<td>35.5</td>
<td>4.3</td>
<td>na</td>
<td>5.2</td>
</tr>
<tr>
<td>Medium Density Residential</td>
<td>8.3</td>
<td>16.4</td>
<td>10.9</td>
<td>18.2</td>
<td>13.2</td>
</tr>
<tr>
<td>High Density Residential</td>
<td>13.8</td>
<td>36.7</td>
<td>31.0</td>
<td>33.6</td>
<td>31.0</td>
</tr>
<tr>
<td>Medium Density Residential Mixed Use</td>
<td>3.7</td>
<td>na</td>
<td>26.4</td>
<td>36.2</td>
<td>17.1</td>
</tr>
<tr>
<td>High Density Res Mixed Use</td>
<td>5.8</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>5.8</td>
</tr>
<tr>
<td>Mixed Use</td>
<td>8.5</td>
<td>na</td>
<td>5.9</td>
<td>na</td>
<td>7.2</td>
</tr>
<tr>
<td>Average</td>
<td>5.4</td>
<td>20.2</td>
<td>8.6</td>
<td>24.1</td>
<td>7.2</td>
</tr>
</tbody>
</table>

Potential range of assumption: Tables 4 and 5 show the most recently data available about housing density in Eugene.

The City Council could consider alternative housing densities. State policy provides guidance for determining housing mix in the Portland Metro UGB and provides a safe harbor for determining housing density.

16 The density of 7.2 units per net acre accounts for all development on the 4,727 tax lots shown in Table 4. While the density analysis focuses on development that occurred between 2001 and 2008, we would underestimate density on these tax lots if we did not account for multifamily dwellings built in phased development prior to 2001.
OAR 660-007 requires that cities of 50,000 or more people in the Metro UGB assume that new residential construction will be average at least 10 dwelling units per net acre. Although OAR 660-007 does not apply to Eugene (because the City is not in the Portland Metro UGB), this rule does illustrate the housing density that cities in the Metro UGB are expected to achieve.

OAR 660-024-0040(f) provides an optional safe harbor for cities that are not subject to ORS 197.296 and have at least 25,000 residents. This safe harbor assumes an average net density of 8.0 dwelling units per net acre. Although this safe harbor does not apply to Eugene (because the City is subject to ORS 197.296), this rule does illustrate the housing density that cities with 25,000 or more people are encouraged by the State to achieve.

- **CAC and TAC discussion:** CAC and TAC made no suggestions for alternative housing density assumptions. Two CAC members suggested increasing density and two CAC members suggested decreasing density.

- **Current technical recommendation for baseline assumption:** We recommend using Eugene’s current housing density in the baseline analysis. Assumptions about future housing density may be revised based on direction from the City Council.

- **Data source:** The assumption about housing density is based on development trends over the 2001 to 2008 period, based on LCOG GIS data and City of Eugene Planning Department’s building permit data.

**RESIDENTIAL DEVELOPMENT IN COMMERCIAL PLAN DESIGNATIONS**

Some housing is currently accommodated on land that is located in a commercial plan designation. Between 2001 and 2008, about 5% of housing located in a commercial plan designation. About 95% of the housing located in a commercial plan designation was multifamily housing with two or more units in the structure.

- **Potential range of assumption:** Multifamily housing can (and does) co-exist with commercial development. Given the recent mix of housing types, it would be plausible that between 5% and 15% of Eugene’s future housing could be located in commercial plan designations. The share of housing located in commercial plan designations could be higher if the City designates more land for mixed-use development or if substantial redevelopment occurs as a mixture of housing and commercial uses in commercial plan designations. It should be noted, however, that locating housing on land designated for commercial uses may displace some commercial uses.
• **CAC and TAC discussion:** The CAC and TAC reviewed and agreed with this assumption.

• **Current technical recommendation for baseline assumption:** We recommend assuming that 5% of housing will be accommodated on land designated for commercial uses.

• **Data source:** The assumption about housing located in commercial plan designations is based on development trends over the 2001 to 2008 period, based on LCOG GIS data and City of Eugene Planning Department’s building permit data.

**CONVERTING NET ACRES TO GROSS ACRES**

The existing data about residential density is in *net* acres, which does not include land for public right-of-way. One way to estimate the amount of land needed for housing including public right-of-way is to convert from *net* to *gross* acres based on assumptions about the amount of land needed for right-of-way.\(^{17}\)

Table 6 shows the net acres as a percent of gross acres and a net-to-gross conversion factor.

**Table 6. Net and gross acres by residential plan designation, Eugene UGB, 2008**

<table>
<thead>
<tr>
<th>Plan Designation</th>
<th>Gross Acres</th>
<th>Acres in Roads</th>
<th>Net Acres</th>
<th>Net Acres as a Percent of Gross Acres</th>
<th>Net-to-Gross Conversion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low Density Residential</td>
<td>20,171</td>
<td>3,754</td>
<td>16,417</td>
<td>78%</td>
<td>22%</td>
</tr>
<tr>
<td>Medium Density Residential</td>
<td>1,916</td>
<td>298</td>
<td>1,618</td>
<td>80%</td>
<td>20%</td>
</tr>
<tr>
<td>High Density Residential</td>
<td>612</td>
<td>158</td>
<td>454</td>
<td>66%</td>
<td>34%</td>
</tr>
<tr>
<td>Total/Avg</td>
<td>22,700</td>
<td>4,211</td>
<td>18,489</td>
<td>78%</td>
<td>22%</td>
</tr>
</tbody>
</table>

Source: LCOG GIS data and City of Eugene Planning Department, 2008

• **Potential range of assumption:** The net-to-gross factor for housing built between 2001 and 2008 in Eugene averaged about 22%, based on analysis of residential development that occurred in Eugene between 2001 and 2008. Based on the data in Table 6, reasonable range of net-to-gross conversion factors in Eugene would be from 20% to 35%.

• **CAC and TAC discussion:** Several CAC members asked that we do more analysis about net-to-gross factors in Eugene. Table 6 shows the results of the additional analysis.

---

\(^{17}\) OAR 660-024-0010(6) uses the following definition of net buildable acre. “Net Buildable Acre” consists of 43,560 square feet of residually designated buildable land after excluding future rights-of-way for streets and roads. While the administrative rule does not include a definition of a gross buildable acre, using the definition above, a gross buildable acre will include areas used for rights-of-way for streets and roads. Areas used for rights-of-way are considered unbuildable.
• Current technical recommendation for baseline assumption: We recommend using a net-to-gross factor of 22%.

• Data source: The net to gross factor is a point in time estimate based on LCOG GIS data and City of Eugene Planning Department’s building permit data.

RESIDENTIAL REDEVELOPMENT

The City of Eugene has a legal obligation to inventory the supply and estimate the capacity of buildable land within the UGB. The inventory must consider land that may be used for residential infill and redevelopment. \(^{18}\) The City does not have an obligation to “create a map or document that may be used to verify and identify specific lots or parcels that have been determined to be buildable lands” \(^{19}\) to show residential infill and redevelopment.

OAR 660-008-0005(6) defines redevelopable land as “land zoned for residential use on which development has already occurred but on which, due to present or expected market forces, there exists the strong likelihood that existing development will be converted to more intensive residential uses during the planning period.” The administrative rule does not define what constitutes a “strong likelihood” for redevelopment.

Moreover, neither Goal 10, OAR 660-008, nor ORS 197.296 define “infill.” Planners and Oregon land-use policy have seemed to define infill as either (1) development that occurs in areas that are already largely developed, or (2) development that occurs on “partially vacant” land. Both of those informal definitions have problems. The first one has no agreed upon, much less legally adopted, way of being measured. The second one requires a definition of partially vacant (generally agreed to mean taxlots that have some development, but less—perhaps substantially less—than plan and zone designations would allow, and some amount of vacant acreage—perhaps as little as a quarter acre that might be feasibly developed).

For the purposes of this study, we define residential redevelopment as development that (1) occurs on land with existing development, and (2) results in a net increase in dwelling units. The second condition means that the replacement of one dwelling unit with one other dwelling unit would not be counted. This definition includes infill on land where there is no demolition, as well as redevelopment that requires demolition of existing structures. Examples of residential redevelopment include: (1) demolition of a single-family dwelling and development of a duplex or

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\(^{18}\) The legal requirements are described in ORS 197.296(3)(a) and (4)(a)(D).

\(^{19}\) Quoted from ORS 197. 296(4)(c).
apartment building, and (2) partitioning a lot with a single-family house and building a new single-family dwelling on the newly created lot.\textsuperscript{20}

After evaluating different approaches for projecting future redevelopment rates and discussing this issue with the CAC at several meetings, City staff directed the consultants to proceed as follows regarding redevelopment:

1. Treat “infill” as a subset of “redevelopment.”

2. Measure the amount of recent redevelopment using the methods described in the memorandum “Redevelopment Methodology and Results.” In summary, use data from LCOG’s address file to estimate the number of new residential addresses that were added between 2001 and 2008 to tax lots identified as developed in 2001. According to LCOG’s quality assurance testing, the address file is very accurate and that this method of estimating redevelopment makes sense. We (ECO) believe that this is the first study to have used this advanced method, that it gives accurate results, and that it is the best information available about the actual amount of residential redevelopment (as defined by state rules) that occurred over a specific, identified period.

3. Use the estimate of the amount of recent redevelopment to create a rate that can be used as a baseline forecast for estimating future redevelopment. For example, if 500 new dwelling units (as identified by new residential addresses) were added over an eight-year period (2001 to 2008, inclusive), then redevelopment accounted, historically for an average of 62 dwelling units per year; if that rate is used for the baseline forecast, then about 1,250 new dwelling units will be built on developed land over the 20-year planning period.

4. Subtract the units estimated to be provided via redevelopment during the planning period (in the example above, 1,250 dwelling units) from the total needed (based on calculations described earlier in the memorandum) to get an estimate of the number of new dwelling units that will be built during the 20-year planning period on land defined as “vacant” in the BLI.

5. City staff checked the results of the analysis described in Steps 1 through 4 above, which initially showed that 722 dwelling units built between 2001 and 2008 resulted from redevelopment. Staff checked the records associated with the redevelopment status of 500 of the 722 dwelling units. The selection criteria that staff used to choose which instances of redevelopment to review was: (1) all instances where redevelopment added four or more addresses (31 tax lots); (2) addresses flagged by a CAC member as possibly incorrectly identified as redevelopment; and (3) randomly selecting several addresses for review. Staff’s analysis included review of aerial photos, review of RLID and GeoDart address

\textsuperscript{20} Subdividing a lot and building an additional dwelling is sometimes referred to as infill. For the purposes of this study, we have categorized this type of development as redevelopment.
files and a review of relevant permit data. This analysis concluded with the revised number of dwelling units shown in Table 7.

The next section describes results of our implementation of the first two sets, and the resulting estimate of the historical rate of redevelopment.

**Results**

Recent residential redevelopment includes lots that had addresses coded before 2001 and received additional addresses after 2001. ECO used the following criteria to identify residential redevelopment: (1) lots that had one or more address prior to 2001; and (2) lots that had additional addresses on the lot after 2001. Plan designation and zoning were not used as selection criteria. Rather, new residential units were identified by land use categories and improvement type. This methodology is consistent with the definition of redevelopment presented in the previous section.

Table 7 shows that between 2001 and 2008 a total of 527 new dwelling units occurred on tax lots that already had dwellings. Of these, 207 were on lots that had single-family dwellings and 144 were on lots that had retirement homes. All of the remaining units were on lots with some type of multi-family dwellings.

**Table 7. Residential redevelopment: new dwellings on developed lots, Eugene UGB, 2001-2008**

<table>
<thead>
<tr>
<th>Existing Unit Type</th>
<th>Existing DU</th>
<th>New DU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apartment With 1 To 4 Units</td>
<td>64</td>
<td>52</td>
</tr>
<tr>
<td>Apartment With 5 To 19 Units</td>
<td>120</td>
<td>59</td>
</tr>
<tr>
<td>Quad</td>
<td>4</td>
<td>2</td>
</tr>
<tr>
<td>Retirement Home</td>
<td>169</td>
<td>144</td>
</tr>
<tr>
<td>Single Family Housing</td>
<td>157</td>
<td>207</td>
</tr>
<tr>
<td>Two Family Housing Unit-Duplex</td>
<td>65</td>
<td>63</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>579</strong></td>
<td><strong>527</strong></td>
</tr>
</tbody>
</table>

Source: LCOG taxlot and address data; analysis by ECONorthwest
Note: Staff review of the analysis of redevelopment (described in the section above) reduced the estimate of new housing resulting from redevelopment from 722 to 527 dwellings.

Based on the results we estimate that about 527 new dwellings were constructed between 2001 and 2008 that could be considered redevelopment. This is about 8% of all housing production during the 2001 to 2008 period. New dwellings constructed on lots with pre-existing development is among the best indicators of redevelopment available because it provides an actual unit count of new housing by housing type for the analysis period. This number may overestimate the actual redevelopment on these lots; some new dwellings may have been part of a phased development—particularly apartments. Despite these limitations, we feel this indicator is one of the more reliable redevelopment indicators.
• **Potential range of assumption:** There is little data available about historical rates of redevelopment. The data suggest that about 8% of all housing production during the 2001 to 2008 period were the result of redevelopment. Based on our experience conducting similar studies in other cities, we think that a reasonable range of redevelopment assumptions is between 5% and 20% of new housing would be accommodated through redevelopment.

• **CAC and TAC discussion:** Residential redevelopment was the most discussed issue with the CAC. Two CAC members suggest decreasing the assumption about the amount of redevelopment that may occur in the 20 year period and two suggest increasing it. One CAC member had concerns about the methodology used to estimate historical redevelopment.

• **Current technical recommendation for baseline assumption:** We recommend assuming about 8% of all new housing will be accommodated through redevelopment, nearly 1,200 new dwelling units.

• **Data source:** LCOG GIS data and City of Eugene Planning Department’s building permit data.

**PUBLIC AND SEMI-PUBLIC LAND NEEDS: BASELINE ASSUMPTIONS**

Cities need to provide land for uses other than housing and employment. Public and semi-public facilities such as schools, governments, churches, parks, and other non-profit organizations will expand as population increases. The analysis of public and semi-public land needs is driven by needs identified by other agencies (e.g., school districts), needs identified by the City (e.g., parks), and historical needs. For the purpose of estimating land needed for other uses, these lands are classified into four categories:

• **Land needed for schools.** The 4J and Bethel school districts have plans for new schools by general location within the City and may have plans for selling surplus school properties.

• **Land needed for parks and open space.** This includes all land designated for park and open space use within the Eugene UGB.

• **Land needed for public operations and facilities.** This includes lands for city offices and maintenance facilities, county facilities, state facilities, federal facilities, and other related public facilities.

• **Lands needed for semi-public uses.** This includes churches, non-profit organizations, and related semi-public uses.

The framework and full analysis of employment land need that meets State requirements will be part of the final report. This section discusses the baseline assumptions necessary for determining the amount of land needed for public and semi-public uses over the 20-year planning period.
SCHOOLS

As population grows, school districts may need additional land for new schools in the planning period. ORS 197.296 requires that cities coordinate need for new land for schools with public school districts. We discussed land need with officials from the 4J and Bethel School Districts. School land needs are based on the estimate of land need provided by the school districts. The 4J School District does not expect to need new land over the 2011 to 2031 period. 21

The Bethel School District expects to need two sites for future schools: (1) an 80-acre site for a high school and (2) a 40-acre site for a K-8 school. These needs could increase if the City expands the UGB and bring more residential land into the UGB in the School District. The District currently owns an 80-acre site that is located outside but adjacent to the UGB. The Bethel School District does not have surplus property.22

- Potential range of assumption: The school districts provided input on their expected land needs. Unless the Council finds these needs unreasonable, there is no range of assumptions.
- CAC and TAC discussion: CAC and TAC discussed school needs but did not have suggestions for alternative school land needs. CAC and TAC members discussed concerns about availability of existing sites within the UGB to accommodate the Bethel District’s land needs.
- Current technical recommendation for baseline assumption: We recommend assuming that the 4J District will not need new land and that the Bethel District will need a 40-acre site and an 80-acre site.
- Data source: Interviews with school district officials.

PARKS AND OPEN SPACE

Parkland need is based on the City’s plans for parkland acquisition described in the Parks, Recreation & Open Space (PROS) Project and Priority Plan. This plan was adopted in 2006 and identifies acquisition and development priorities for a population consistent with that identified in ECLA. Parkland need is based on the specific projects identified in this plan.

- Potential range of assumption: Based on the PROS Project and Priority Plan, the City will need 1,980 acres of new parkland by 2031. Of this total, 160 acres are identified in residential areas within the UGB and 140 acres of parkland need identified in the plan are already owned by the City, but are located outside

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21 This information was provided by Barb Bellamy, Communications Director at 4J in an interview on March 12, 2009.

22 This information was provided by Pat McGillivray, Communications Relations for the Bethel School District in an interview on March 12, 2009.
the UGB. These areas include the Golden Gardens expansion area and the Santa Clara Community Park. The parkland need identified in the plan assumes no expansion of the UGB. If new land is brought into the UGB to accommodate residential development, more parkland (especially for neighborhood parks) may be needed to serve that geographic area.

- **CAC and TAC discussion:** CAC and TAC discussed parkland needs but did not have suggestions for alternative parkland land needs beyond those identified in the *PROS Project and Priority Plan*. The CAC suggested that the City should address whether the PROS Project and Priority plan needs to be adopted as a formal land use plan.

- **Current technical recommendation for baseline assumption:** We recommend that the City base parkland need on the *PROS Project and Priority Plan* need for 160 acres of parkland within the UGB in residential areas.

- **Data source:** City of Eugene Parks Department

**PUBLIC FACILITIES AND OPERATIONS**

This category includes lands for city offices and maintenance facilities, county facilities, state facilities, federal facilities, and other related public facilities. It does not include right-of-ways, land used by the railroad, or land owned by the Bonneville Power Administration. The City currently has 6.6 acres per 1,000 people (1,174 acres) for public facilities and operations.

- **Potential range of assumption:** Based on the existing level of service (6.6 acres per 1,000 people) and expected population growth, the City may need about 225 acres of land for public facilities and operations over the planning period. This estimate seems high because Eugene already has many of the operations that are necessary for a city the size of Eugene, such as: a wastewater treatment facility, local and regional government office buildings, the University of Oregon’s campus and related facilities, utility and other operations, and other public facilities. An alternative assumption might be that Eugene will need 100 new acres of land (2.9 acres per 1,000 people) for public facilities and operations. Among other things, this estimate of land need will address the University of Oregon’s expected growth of 30-acres over the planning period.

- **CAC and TAC discussion:** CAC and TAC discussed public facilities and operations land need and seemed to think that assuming a need for 6.6 acres per 1,000 people was too high. Some committee members were concerned

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23 Christopher Ramey, Associate Vice President at the University of Oregon, said that the University expects to purchase and develop roughly 30-acres over the 20-year planning period.
about the availability of sites within the UGB to provide for needed public facilities.

- **Current technical recommendation for baseline assumption:** We recommend assuming need for 100 acres of land for public facilities and operations.
- **Data source:** LCOG GIS data and City of Eugene Planning Department’s building permit data

**SEMI-PUBLIC USES**

This category includes lands for semi-public uses, such as churches, non-profit organizations, and related semi-public uses. The City currently has 1.3 acres per 1,000 people (232 acres) for semi-public uses.

- **Potential range of assumption:** The City could assume that future need for semi-public land will be similar to current uses, at 1.3 acres per 1,000 people. Under that assumption, the City will need about 50 acres for semi-public uses over the 20-year planning period.
- **CAC and TAC discussion:** CAC and TAC had no comments on the need for future semi-public land needs.
- **Current technical recommendation for baseline assumption:** We recommend assuming need for 1.3 acres per 1,000 people or 50 acres of land for public facilities and operations.
- **Data source:** The assumption about need for semi-public land is a point in time estimate, based on LCOG GIS data and City of Eugene Planning Department’s building permit data.
## Appendix G: Technical Memoranda

### APPENDIX 1: SUMMARY OF ASSUMPTIONS AND RECOMMENDED VALUES FOR THE LAND NEED ANALYSIS

<table>
<thead>
<tr>
<th>Variable</th>
<th>Rec. Value</th>
<th>Source of Data</th>
<th>Rationale</th>
<th>Reasonable Range</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Employment Land Needs</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employment growth</td>
<td>1.4%</td>
<td>State of Oregon</td>
<td>Safe harbor and forecast</td>
<td>0.9% to 2.1%</td>
</tr>
<tr>
<td>Share of Emp by Type</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Industrial</td>
<td>18%</td>
<td>State of Oregon</td>
<td>Current mix</td>
<td>15% - 23%</td>
</tr>
<tr>
<td>Commercial</td>
<td>54%</td>
<td></td>
<td></td>
<td>46% - 55%</td>
</tr>
<tr>
<td>Retail</td>
<td>13%</td>
<td></td>
<td></td>
<td>13% - 15%</td>
</tr>
<tr>
<td>New Employment in Non-employment PD</td>
<td>15%</td>
<td>State of Oregon</td>
<td>Current percentage</td>
<td>10% - 20%</td>
</tr>
<tr>
<td>New Employment in Existing Built Space</td>
<td>10%</td>
<td>City of Eugene</td>
<td>Other cities</td>
<td>5% - 20%</td>
</tr>
<tr>
<td>Employment Redevelopment</td>
<td></td>
<td>City of Eugene</td>
<td>Other cities</td>
<td>10% to 50%</td>
</tr>
<tr>
<td>Industrial</td>
<td>10%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Commercial</td>
<td>15%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Retail</td>
<td>35%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employment Density</td>
<td></td>
<td>State of Oregon</td>
<td>Current average</td>
<td>Varies</td>
</tr>
<tr>
<td>Industrial</td>
<td>13 EPA</td>
<td></td>
<td></td>
<td>5-20 EPA</td>
</tr>
<tr>
<td>Commercial</td>
<td>68 EPA</td>
<td></td>
<td></td>
<td>30-93 EPA</td>
</tr>
<tr>
<td>Retail</td>
<td>23 EPA</td>
<td></td>
<td></td>
<td>20-37 EPA</td>
</tr>
<tr>
<td>Net to Gross for Right-of-Way</td>
<td>20% (15%)</td>
<td>City of Eugene</td>
<td>Current average</td>
<td>15% - 20%</td>
</tr>
<tr>
<td><strong>Residential Land Needs</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Population Growth</td>
<td>0.9%</td>
<td>Lane County</td>
<td>Adopted Forecast</td>
<td>None</td>
</tr>
<tr>
<td>Population in Group Quarters</td>
<td>5.3%</td>
<td>US Census</td>
<td>Current average</td>
<td>4.4% - 5.5%</td>
</tr>
<tr>
<td>Persons per Household</td>
<td>2.25</td>
<td>US Census</td>
<td>Safe harbor</td>
<td>Difficult to estimate</td>
</tr>
<tr>
<td>Residential Vacancy Rate</td>
<td>5%</td>
<td>US Census</td>
<td>Recent data</td>
<td>3.5% - 6.5%</td>
</tr>
<tr>
<td>Housing mix</td>
<td></td>
<td>City of Eugene</td>
<td>Historic data &amp; recent trends</td>
<td>45% - 69%</td>
</tr>
<tr>
<td>Single-family detached</td>
<td>61%</td>
<td></td>
<td></td>
<td>7% - 10%</td>
</tr>
<tr>
<td>Single-family attached</td>
<td>7%</td>
<td></td>
<td></td>
<td>6% to 10%</td>
</tr>
<tr>
<td>Two to five units</td>
<td>10%</td>
<td></td>
<td></td>
<td>18% to 35%</td>
</tr>
<tr>
<td>Five or more units</td>
<td>22%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Housing Density</td>
<td>7.3</td>
<td>City of Eugene</td>
<td>Recent trends</td>
<td>Average of 6.7-10.0 Dwelling units per acre</td>
</tr>
<tr>
<td>Single-family detached</td>
<td>5.4</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Single-family attached</td>
<td>20.2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Two to four units</td>
<td>8.6</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Five or more units</td>
<td>24.1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Residential development in commercial PD</td>
<td>5%</td>
<td>City of Eugene</td>
<td>Current percentage</td>
<td>5% - 15%</td>
</tr>
<tr>
<td>Residential redevelopment</td>
<td>8%</td>
<td>City of Eugene</td>
<td>Recent trends</td>
<td>5% to 20%</td>
</tr>
<tr>
<td>Net to Gross for Right-of-Way</td>
<td>22%</td>
<td>City of Eugene</td>
<td>Current average</td>
<td>20% to 35%</td>
</tr>
<tr>
<td><strong>Public and Semi-Public Land Needs</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Park Land (inside the UGB)</td>
<td>160 acres</td>
<td>City of Eugene</td>
<td>PROS Project and Priority Plan</td>
<td>N/A</td>
</tr>
<tr>
<td>Schools</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4J School District</td>
<td>0 acres</td>
<td></td>
<td></td>
<td>N/A</td>
</tr>
<tr>
<td>Bethel School District</td>
<td>120 acres</td>
<td></td>
<td></td>
<td>4J</td>
</tr>
<tr>
<td>Public Operations and Facilities</td>
<td>100 acres</td>
<td>City of Eugene</td>
<td>Recent trends</td>
<td>100 - 230 acres</td>
</tr>
<tr>
<td>Semi-public uses and Facilities</td>
<td>50 acres</td>
<td>City of Eugene</td>
<td>Recent trends</td>
<td>25 - 75 acres</td>
</tr>
</tbody>
</table>

Note: We excluded government employment growth because government land need is accommodated through public and semi-public land needs.
April 14, 2010
TO: Eugene City Council
CC: Jason Dedrick
FROM: Bob Parker, Terry Moore, and Beth Goodman,
SUBJECT: BASELINE ANALYSIS OF THE ABILITY OF VACANT RESIDENTIAL LAND IN EUGENE TO ACCOMMODATE NEW HOUSING

The City of Eugene is conducting an assessment of land within its Urban Growth Boundary (UGB). Part of that assessment addresses whether Eugene has enough suitable land for residential development (residential land) to meet needs for the next 20 years. A key question in the residential lands analysis is “How much new housing can be accommodated by vacant land designated for residential use in the current UGB?”

This memorandum provides empirical analysis to help answer that question. It analyzes historical housing densities in Eugene based on plan designation and land characteristics, and applies those densities to vacant residential lands. This memorandum provides a baseline analysis of the ability of vacant residential land in Eugene to accommodate new housing. The analysis in this memorandum was presented to the Community Advisory Committee (CAC) in November 2009 and revised based on CAC feedback received through November 2009 to April 2010. This memorandum is organized as follows:

1 Framework for this analysis provides an overview of the analysis and key questions that the analysis of vacant residential land to accommodate new housing will answer.

2 Methods and assumptions describes what methods ECO used for the analysis.

3 Results summarizes the findings of ECO’s analysis of the ability of vacant residential land in Eugene to accommodate new housing.

4 Conclusions summarizes our findings and the implications for the overall residential land needs analysis.
FRAMEWORK FOR THE ANALYSIS

The Eugene Comprehensive Lands Assessment intends to evaluate the sufficiency of land within the UGB to accommodate 20-year forecasts of housing and employment. Like all land needs studies, it includes a supply analysis (buildable and redevelopable land by type) and a demand analysis (population and employment growth leading to demand for more built space: residential and non-residential development). The comparison of supply and demand allows the determination of land sufficiency.

There are two ways to get estimates of supply and demand into common units of measurement so that they can be compared: (1) housing demand can be converted into acres, or (2) residential land supply can be converted into dwelling units. A complication of either approach is that not all land has the same characteristics. Factors such as plan designation, slope, parcel size and shape, can all affect the ability of land to accommodate housing. Methods that recognize this fact are more robust and produce more realistic results. This analysis uses the second approach: it estimates the ability of vacant residential lands within the UGB to accommodate new housing.

This analysis, sometimes called a “capacity analysis,” can be used to evaluate different ways that vacant residential land may buildout by applying different assumptions. These assumptions may be general (such as consideration of capacity based on an assumption of overall density of all housing types and overall acreage), or more specific (such as density by housing type, and accounting for actual lot sizes and distribution). For example, a residential land capacity analysis could provide information about any of the following:

1. How many units could be developed on buildable lands if development occurred at maximum zoned density?
2. How many units could be developed on buildable lands if development occurred at historical mix and density?
3. How many units could be developed on buildable lands if development occurred at needed mix and density identified in the housing needs forecast?

The latter (Option 3) is what state law requires, but the ECLA scope of work stops short of evaluating key policy issues, and such an evaluation is required to determine

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24 There is ambiguity in the term capacity analysis. It would not be unreasonable for one to say that the “capacity” of vacant land is the maximum number of dwellings that could be built based on density limits defined legally by plan designation or zoning, and that development usually occurs—for physical and market reasons—at something less than full capacity. For that reason, we have used the longer phrase to describe our analysis: “estimating how many new dwelling units the vacant residential land in the UGB is likely to accommodate.” That phrase is, however, cumbersome, and it is common in Oregon and elsewhere to refer to that type of analysis as “capacity analysis,” so we use that shorthand occasionally in this memorandum.
the *needed* mix and density. That evaluation will happen in 2010, after the ECLA study is completed.

**METHODS AND ASSUMPTIONS**

The final step in the residential buildable lands inventory is to estimate the number of dwelling units that can be accommodated on vacant lands planned for residential uses. The capacity of residential land is measured in dwelling units and typically is based on assumptions about: (1) vacant buildable land (potentially including redevelopable land)\(^\text{25}\), (2) constraints; and (3) densities. In short, land capacity is a function of buildable land and density. The capacity can then be compared to new needed dwellings to estimate the surplus or deficit of land.

The buildable lands inventory prepared by LCOG provides the foundational information about the acres, lot sizes, and plan designations of the land supply and its development status (developed or vacant). It also provides information about constraints associated with those properties (natural or regulatory characteristics that reduce efficiency or preclude development). The capacity analysis requires specific assumptions to determine how much development the buildable lands will accommodate. The purpose of this summary is to discuss potential capacity methods and the assumptions needed to implement those methods.

The basic form of any method requires (1) an estimate of *buildable* land (e.g., land that is developable minus constraints), and (2) assumptions about density. The arithmetic is straightforward:

\[
\text{Buildable Land (ac) \times Density (du/ac) = Capacity (in dwelling units)}
\]

For example:

\[
100 \text{ acres} \times 6 \text{ du/ac} = 600 \text{ dwelling units of capacity}
\]

The example is a simplification of the method, and makes several implicit assumptions: acres and density are measured in the same units (either gross or net)\(^\text{26}\); all of the acres have capacity (e.g., no constraints of any type that limit capacity exist); and

\(^{25}\) We addressed redevelopment through the analysis of demand for housing by deducting expected redevelopment from needed housing, so no analysis of redevelopment capacity is included in this analysis.

\(^{26}\) OAR 660-024-0010(6) provides the following definition: “Net Buildable Acre” consists of 43,560 square feet of residentially designated buildable land after excluding future rights-of-way for streets and roads. Thus, a gross acre is an acre that includes future rights-of-way for streets and roads. Net densities are always higher than gross densities. Sample net to gross calculation for single-family detached using a 25% net to gross factor: Gross density = net density \(* (1-0.25)\). For example: net density of 6.0 dwelling units per acre equates to a gross residential density of 4.5 dwelling units per acre (6.0 \(* (1-.25)\)=4.5).
a minimum threshold on lot size exists where making net to gross deductions is not appropriate.

The description above skips some of the nuances that can be incorporated into the method. For example, the method should recognize planned densities\textsuperscript{27} and other factors that affect densities. Examples include physical characteristics such as slope or policies that affect density (for example, natural resource policies that require areas of sites be preserved).

A key methodological issue is whether to conduct the analysis in aggregate (e.g., grouping like land types together) or by tax lot. This analysis uses an aggregate method because of the number of tax lots involved, and because of the complexities of conducting a site-by-site evaluation of development potential.\textsuperscript{28} For example, lands in the medium density residential (MDR) plan designation can accommodate a broad range of housing types and densities, which requires a decision (and a justification for it) about what housing mix and density to use as an average. Our method does not require site specific assumptions; rather it applies average densities to land area to derive a dwelling unit estimate.

**STEPS USED IN THE ANALYSIS OF THE ABILITY OF RESIDENTIAL LAND TO ACCOMMODATE NEW HOUSING**

This section describes how we conducted the analysis. The input data and assumptions are: (1) results of the LCOG BLI by plan designation; (2) lot size; (3) net-to-gross factors; (4) results from an analysis of historical residential density in Eugene over the 2001 to 2008 period; and (5) constraints that are likely to decrease housing densities.\textsuperscript{29} Appendix A includes a summary of assumptions applied to the analysis.

**Step 1: Analyze land base**

The first step we took in evaluating housing potential was to review key characteristics of the vacant residential land base. Building from the LCOG inventory, we analyzed lands by slope, by size, and by constraint status. The inventory identifies

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\textsuperscript{27} OAR 660-008-0010 states “The mix and density of needed housing is determined in the housing needs projection. Sufficient buildable land shall be designated on the comprehensive plan map to satisfy housing needs by type and density range as determined in the housing needs projection. The local buildable lands inventory must document the amount of buildable land in each residential plan designation.” In short, the inventory and needs analysis must be by residential plan designation. Because of this rule, we use a method that results in estimates by plan designation rather than by zoning, or by housing type.

\textsuperscript{28} More complex methods do not necessarily yield more reliable results because the often require more and more specific assumptions about the future which increases the so-called “cone of uncertainty.”

\textsuperscript{29} Slope and wetlands are the constraints included in this analysis. The BLI excluded a number of lands for various reasons; none of the excluded lands are included in this analysis. See the BLI document for details.
1,679 vacant, buildable acres within residential plan designations included in this analysis.\textsuperscript{30} Table 1 shows vacant residential acres by plan designation.

\textbf{Table 1. Vacant residential gross acres by plan designation in the Eugene UGB as of 2008}

<table>
<thead>
<tr>
<th>Size Class/Plan Designation</th>
<th>Acres</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low Density Residential</td>
<td>1,432</td>
</tr>
<tr>
<td>Medium Density Residential</td>
<td>180</td>
</tr>
<tr>
<td>High Density Residential</td>
<td>67</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>1,679</strong></td>
</tr>
</tbody>
</table>

Source: ECLA BLI, LCOG, 2009

\textsuperscript{30} The following plan designations are included in this analysis: High Density Residential, Low Density Residential, and Medium Density Residential. Not included are the following mixed use plan designations: Mixed Use, High Density Residential Mixed Use; Medium Density Residential Mixed Use. Housing is not allocated to mixed use designated land due to Oregon Administrative Rules that require “clear and objective” standards for residential development (OAR 660-008-0015), although it is known that some housing will be built on mixed use land. The buildable land inventory identified a total of six vacant acres in these mixed use plan designations; thus the capacity for new housing is limited.
Step 2: Develop a framework for categorizing land

The categories that we use to develop the capacity estimates are important. Table 2 shows the preliminary categories which focus on plan designation, slope, and lot size.

### Table 2. Vacant land by plan designation in primary categories for describing residential capacity, gross acres by plan designation and size class

<table>
<thead>
<tr>
<th>Size Class/Plan Designation</th>
<th>Slope</th>
<th>0-5</th>
<th>5-15</th>
<th>15-25</th>
<th>25-30</th>
<th>30+</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;1 Ac</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Low Density Residential</td>
<td>132</td>
<td>68</td>
<td>61</td>
<td>10</td>
<td>19</td>
<td></td>
<td>290</td>
</tr>
<tr>
<td>Medium Density Residential</td>
<td>16</td>
<td>1</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td></td>
<td>17</td>
</tr>
<tr>
<td>High Density Residential</td>
<td>5</td>
<td>0</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td></td>
<td>6</td>
</tr>
<tr>
<td>Subtotal</td>
<td>153</td>
<td>70</td>
<td>61</td>
<td>10</td>
<td>19</td>
<td></td>
<td>313</td>
</tr>
<tr>
<td>1-5 Ac</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Low Density Residential</td>
<td>51</td>
<td>28</td>
<td>35</td>
<td>-</td>
<td>26</td>
<td></td>
<td>139</td>
</tr>
<tr>
<td>Medium Density Residential</td>
<td>24</td>
<td>4</td>
<td>2</td>
<td>-</td>
<td>-</td>
<td></td>
<td>30</td>
</tr>
<tr>
<td>High Density Residential</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td></td>
<td>-</td>
</tr>
<tr>
<td>Subtotal</td>
<td>75</td>
<td>32</td>
<td>37</td>
<td>-</td>
<td>26</td>
<td></td>
<td>169</td>
</tr>
<tr>
<td>5+ Ac</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Low Density Residential</td>
<td>284</td>
<td>212</td>
<td>341</td>
<td>81</td>
<td>84</td>
<td></td>
<td>1,003</td>
</tr>
<tr>
<td>Medium Density Residential</td>
<td>68</td>
<td>35</td>
<td>29</td>
<td>-</td>
<td>-</td>
<td></td>
<td>132</td>
</tr>
<tr>
<td>High Density Residential</td>
<td>59</td>
<td>2</td>
<td>1</td>
<td>-</td>
<td>-</td>
<td></td>
<td>62</td>
</tr>
<tr>
<td>Subtotal</td>
<td>411</td>
<td>249</td>
<td>371</td>
<td>81</td>
<td>84</td>
<td></td>
<td>1,197</td>
</tr>
<tr>
<td>Total</td>
<td>639</td>
<td>351</td>
<td>469</td>
<td>91</td>
<td>128</td>
<td></td>
<td>1,679</td>
</tr>
</tbody>
</table>

Source: ECLA BLI, LCOG, 2009; analysis by ECONorthwest

Step 3. Develop net-to-gross factors

The lot size categories apply net-to-gross factors that build from the assumptions in the HNA and are applied as follows:

- <1 ac – no deduction
- 1-5 ac – 50% of assumed net to gross factor
- 5+ ac – 100% of assumed net to gross factor

ECO conducted an empirical analysis of net and gross acres to provide the foundation for the net-to-gross factor assumptions. Table 3 shows the results.
Table 3. Net and gross acres by residential plan designation, Eugene UGB, 2008

<table>
<thead>
<tr>
<th>Plan Designation</th>
<th>Gross Acres</th>
<th>Acres in Roads</th>
<th>Net Acres</th>
<th>Net Acres as a Percent of Gross Acres</th>
<th>Net-to-Gross Conversion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low Density Residential</td>
<td>20,171</td>
<td>3,754</td>
<td>16,417</td>
<td>78%</td>
<td>22%</td>
</tr>
<tr>
<td>Medium Density Residential</td>
<td>1,916</td>
<td>298</td>
<td>1,618</td>
<td>80%</td>
<td>20%</td>
</tr>
<tr>
<td>High Density Residential</td>
<td>612</td>
<td>158</td>
<td>454</td>
<td>66%</td>
<td>34%</td>
</tr>
<tr>
<td>Total/Avg</td>
<td>22,700</td>
<td>4,211</td>
<td>18,489</td>
<td>78%</td>
<td>22%</td>
</tr>
</tbody>
</table>

Source: ECLA BLI, LCOG, 2009; analysis by ECONorthwest

Step 4. Analyze historical density

Estimating the ability of vacant residential land to accommodate new dwelling units requires assumptions about buildable acres and density. The analysis is based on historical densities achieved over the 2001 to 2008 period. We chose this period because ORS 197.296(5)(a) requires cities to determine housing capacity based on data collected since the last periodic review but allows a city to use a shorter time period if it will provide more accurate and reliable data about housing capacity. We selected this the 2001 to 2008 time period over the 1999 to 2008 period because it shows housing mix that occurred since the City’s revised zoning ordinance went into effect in 2001.

To provide context for densities and the relationship between density and slope, we analyzed density by slope class and plan designation. Our initial hypothesis was that an inverse relationship would exist between density and slope—as slope increased, density would decrease. Table 4 shows the results. For most plan designations, little development occurred between 2001 and 2008 on slopes greater than five percent. The exception is low density residential (LDR). The results show lower densities in LDR for all development on slopes greater than five percent. Appendix A shows the supply of developable residential land within the Eugene UGB in Table A-2.

Table 4. Analysis of residential net density (dwelling units per net acre) by slope category, 2001-2008

<table>
<thead>
<tr>
<th>Plan Designation</th>
<th>0-5</th>
<th>5-15</th>
<th>15-25</th>
<th>25-30</th>
<th>30+</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low Density Residential</td>
<td>5.7</td>
<td>3.8</td>
<td>3.5</td>
<td>3.9</td>
<td>NA</td>
<td>5.2</td>
</tr>
<tr>
<td>Medium Density Residential</td>
<td>10.1</td>
<td>10.1</td>
<td>No data</td>
<td>No data</td>
<td>NA</td>
<td>10.1</td>
</tr>
<tr>
<td>High Density Residential</td>
<td>28.8</td>
<td>Insufficient data</td>
<td>No data</td>
<td>No data</td>
<td>NA</td>
<td>29.1</td>
</tr>
</tbody>
</table>

Note: No data means that no development occurred in that category between 2001 and 2008; insufficient data for the high-density residential designation is based on the fact that only one development occurred in that designation which could not be considered enough data to determine a trend. Note that lands with slopes over 30% were excluded from the vacant land base and are not applicable to this analysis.

Step 5. Deduct other constraints

We evaluated other constraints (e.g., landslides, wetlands) likely to reduce the ability of vacant residential land to accommodate new dwelling units. We evaluated geologic hazard data from the Oregon Department of Geology and Mineral Industries and concluded that (a) the data are limited and uncertain, and (b) there is substantial
overlap with slope hazards. The City does not prohibit development in areas of geologic hazard; they require a geotechnical analysis prior to development. Thus, we believe that slope serves as a good proxy for geologic hazards.

We also included data from the Local Wetland Inventory (LWI), which includes wetlands that were not excluded due to other factors (e.g., federal ownership or other protections). Table 5 shows that very little land (44 acres) in the LWI exists on vacant residential land.

**Table 5. Acres in local wetland inventory, by plan designation, in the Eugene UGB, 2008**

<table>
<thead>
<tr>
<th>Plan Designation</th>
<th>LWI Acres</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low Density Residential</td>
<td>44.0</td>
</tr>
<tr>
<td>Medium Density Residential</td>
<td>0.0</td>
</tr>
<tr>
<td>High Density Residential</td>
<td>0.0</td>
</tr>
<tr>
<td>Total</td>
<td>44.0</td>
</tr>
</tbody>
</table>

*Source: Eugene local wetland inventory; analysis by LCOG*

Developers are required to mitigate wetlands in the LWI, but the rules do not preclude development. Thus, it is reasonable to assume that some land will be developed, but not all land. With only 44 acres of LWI land, whatever development assumption we make has little affect on overall land need in the UGB. We used the assumption that all of LWI wetlands in LDR would develop in the analysis that follows.

**RESULTS**

Table 6 shows the results of the estimate of housing potential. The results show that, based on the empirically derived assumptions described in the previous section, Eugene has potential for 8,277 new dwelling units on vacant land. We consider this a reasonable and well-documented answer to the question of “if Eugene grows in the future like it has in the recent past, how much housing can we accommodate in the UGB?” The City may want to consider policy changes that will cause increases in housing density, so that Eugene’s future growth is substantially different from historical growth. These discussions would occur as part of the policy discussion in 2010 and beyond.
Table 6. Estimated housing potential on vacant residential lands, number of dwelling units, Eugene UGB

<table>
<thead>
<tr>
<th>Plan Designation</th>
<th>0%-5%</th>
<th>5%-15%</th>
<th>15%-25%</th>
<th>25%-30%</th>
<th>30%+ (excluded)</th>
<th>Wetlands</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low Density Residential</td>
<td>2,061</td>
<td>946</td>
<td>1,319</td>
<td>271</td>
<td>0</td>
<td>327</td>
<td>4,924</td>
</tr>
<tr>
<td>Medium Density Residential</td>
<td>1,205</td>
<td>403</td>
<td>309</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1,917</td>
</tr>
<tr>
<td>High Density Residential</td>
<td>1,371</td>
<td>46</td>
<td>19</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1,436</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>4,637</td>
<td>1,395</td>
<td>1,647</td>
<td>271</td>
<td>0</td>
<td>327</td>
<td>8,277</td>
</tr>
</tbody>
</table>

Source: ECONorthwest
Note: lands with over 30% slope were considered unbuildable in the BLI.

Table 7 shows some key elements of the analysis. It shows vacant residential acres by plan designation, dwelling unit (DU) potential, and average gross residential density. The average gross density is slightly lower than the observed gross residential density of about 5.7 dwelling units per gross acre between 2001 and 2008. This is a function of type of residential acres that are vacant: while the largest portion of vacant land is in the low density residential plan designation, about two-thirds of land in LDR is on slopes of 5% or greater, which reduces the average density in Table 7.

Table 7. Housing potential summary based on historical densities observed between 2001 and 2008

<table>
<thead>
<tr>
<th>Plan Designation</th>
<th>Vacant Acres</th>
<th>DU Potential</th>
<th>Average density (DU/ Gross Ac)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low Density Residential</td>
<td>1,432</td>
<td>4,924</td>
<td>3.4</td>
</tr>
<tr>
<td>Medium Density Residential</td>
<td>180</td>
<td>1,917</td>
<td>10.7</td>
</tr>
<tr>
<td>High Density Residential</td>
<td>67</td>
<td>1,436</td>
<td>21.3</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>1,679</td>
<td>8,277</td>
<td>4.9</td>
</tr>
</tbody>
</table>

Source: ECONorthwest
Note: Density assumptions based on historical densities observed between 2001 and 2008.

CONCLUSIONS

The estimates provided in this memorandum are based on analysis of data of the vacant land base and of development that occurred between 2001 and 2008. A typical baseline for any forecast—a starting point for discussion and further modeling using different assumptions—assumes that the future will be like the past. Regarding our analysis, reasons exist to argue otherwise, including (1) the land that developed between 2001 and 2008 is not the land that is available now, (2) the market conditions that existed in the 2001-2008 period do not exist now, and may be different in the future, (3) state and local policy, especially regarding the location and pricing of infrastructure, may change, and (4) external factors may change, some of which (e.g., demographic trends, climate change, energy prices) suggest that the future will trend towards more dense housing.
## Appendix G: Technical Memoranda

### Appendix 1: Assumptions

Table A-1 shows assumptions used in the analysis.

#### Table 8 Summary of assumptions

1. **Density Assumptions (DU/NRA)**

<table>
<thead>
<tr>
<th>Plan Designation</th>
<th>Slope 0%-5%</th>
<th>Slope 5%-15%</th>
<th>Slope 15%-25%</th>
<th>Slope 25%-30%</th>
<th>Slope 30%-40% (excluded)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low Density Residential</td>
<td>5.2</td>
<td>3.7</td>
<td>3.7</td>
<td>3.7</td>
<td>NA</td>
</tr>
<tr>
<td>Medium Density Residential</td>
<td>13.2</td>
<td>12.5</td>
<td>12.5</td>
<td>12.5</td>
<td>NA</td>
</tr>
<tr>
<td>High Density Residential</td>
<td>31.0</td>
<td>31.0</td>
<td>31.0</td>
<td>31.0</td>
<td>NA</td>
</tr>
</tbody>
</table>

Source: Empirical analysis of residential development between 2001-2008

2. **Base Net-to-Gross Factors**

<table>
<thead>
<tr>
<th>Plan Designation</th>
<th>Base Gross</th>
<th>Net to Gross</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low Density Residential</td>
<td>78%</td>
<td>22%</td>
</tr>
<tr>
<td>Medium Density Residential</td>
<td>80%</td>
<td>20%</td>
</tr>
<tr>
<td>High Density Residential</td>
<td>66%</td>
<td>34%</td>
</tr>
</tbody>
</table>

Source: Empirical analysis of all residential land in the Eugene UGB

3. **Lot Size Net-to-Gross Deductions**

<table>
<thead>
<tr>
<th>Lot Size</th>
<th>Percent of Base Factor</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;1 ac</td>
<td>0%</td>
</tr>
<tr>
<td>1-5 ac</td>
<td>70%</td>
</tr>
<tr>
<td>5+ ac</td>
<td>100%</td>
</tr>
</tbody>
</table>

Source: Assumptions based on lot size

4. **Net-to-Gross Factors by Lot Size**

<table>
<thead>
<tr>
<th>Plan Designation</th>
<th>&lt;1 ac</th>
<th>1-5 ac</th>
<th>5+ ac</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low Density Residential</td>
<td>0%</td>
<td>15.3%</td>
<td>22%</td>
</tr>
<tr>
<td>Medium Density Residential</td>
<td>0%</td>
<td>14.1%</td>
<td>20%</td>
</tr>
<tr>
<td>High Density Residential</td>
<td>0%</td>
<td>23.8%</td>
<td>34%</td>
</tr>
</tbody>
</table>

Source: Derived from items 2 and 3

5. **LWI Wetland Development Factors**

<table>
<thead>
<tr>
<th>Plan Designation</th>
<th>LWI Acres</th>
<th>% Developable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low Density Residential</td>
<td>44.0</td>
<td>100%</td>
</tr>
<tr>
<td>Medium Density Residential</td>
<td>0.0</td>
<td>50%</td>
</tr>
<tr>
<td>High Density Residential</td>
<td>0.0</td>
<td>50%</td>
</tr>
<tr>
<td>Total</td>
<td>44.0</td>
<td></td>
</tr>
</tbody>
</table>

Source: Acres from LWI; % developable is an assumption
## Table 9 Gross Density Assumptions (dwelling units by gross acres), Eugene UGB

<table>
<thead>
<tr>
<th>Plan Designation</th>
<th>0%-5%</th>
<th>5%-15%</th>
<th>15%-25%</th>
<th>25%-30%</th>
<th>30% (excluded)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>&lt;1 ac</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Low Density Residential</td>
<td>5.2</td>
<td>3.7</td>
<td>3.7</td>
<td>3.7</td>
<td>NA</td>
</tr>
<tr>
<td>Medium Density Residential</td>
<td>13.2</td>
<td>12.5</td>
<td>12.5</td>
<td>12.5</td>
<td>NA</td>
</tr>
<tr>
<td>High Density Residential</td>
<td>31.0</td>
<td>31.0</td>
<td>31.0</td>
<td>31.0</td>
<td>NA</td>
</tr>
<tr>
<td><strong>1-5 ac</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Low Density Residential</td>
<td>4.4</td>
<td>3.1</td>
<td>3.1</td>
<td>3.1</td>
<td>NA</td>
</tr>
<tr>
<td>Medium Density Residential</td>
<td>11.3</td>
<td>10.7</td>
<td>10.7</td>
<td>10.7</td>
<td>NA</td>
</tr>
<tr>
<td>High Density Residential</td>
<td>23.6</td>
<td>23.6</td>
<td>23.6</td>
<td>23.6</td>
<td>NA</td>
</tr>
<tr>
<td><strong>5+ ac</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Low Density Residential</td>
<td>4.1</td>
<td>2.9</td>
<td>2.9</td>
<td>2.9</td>
<td>NA</td>
</tr>
<tr>
<td>Medium Density Residential</td>
<td>10.5</td>
<td>10.0</td>
<td>10.0</td>
<td>10.0</td>
<td>NA</td>
</tr>
<tr>
<td>High Density Residential</td>
<td>20.5</td>
<td>20.5</td>
<td>20.5</td>
<td>20.5</td>
<td>NA</td>
</tr>
</tbody>
</table>

Source: Derived from tables 1, 2, and 4