

# City of Winston Housing Needs Analysis

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# Acknowledgements

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# Introduction

The Winston Housing Needs Analysis (HNA) is intended to serve as a basis for the City of Winston to document new information regarding the city's Buildable Land Inventory (BLI), population and employment trends, and development policies aimed at providing adequate land within the urban growth boundary (UGB) to accommodate the next 20 years of population growth.

## Oregon Regulatory 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 applicable requirements of Goal 10 and the statutes and administrative rules that implement it (ORS 197.295 to 197.314, ORS 197.475 to 197.490, and OAR 600-008).<sup>1</sup> Goal 10 requires incorporated cities to complete an inventory of buildable residential lands. Goal 10 also requires cities to encourage the numbers of housing units in price and rent ranges commensurate with the financial capabilities of its households. Goal 10 defines needed housing types as "all housing on land zoned for residential use or mixed residential and commercial use that is determined to meet the need shown for housing within an UGB at price ranges and rent levels that are affordable to households within the county with a variety of incomes, including but not limited to households with low incomes, very low incomes and extremely low incomes." 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.<sup>2</sup>
- (c) Mobile home or manufactured dwelling parks as provided in ORS 197.475 to 197.490.
- (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.
- (e) Housing for farmworkers.

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<sup>1</sup> ORS 197.296 only applies to cities with populations over 25,000.

<sup>2</sup> Government assisted housing can be any housing type listed in ORS 197.303 (a), (c), or (d).

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## Methodology

A recommended approach to conducting a housing needs analysis is described in *Planning for Residential Growth: A Workbook for Oregon's Urban Areas*, the Department of Land Conservation and Development's guidebook on local housing needs studies. As described in the workbook, the specific steps in the housing needs analysis are:

1. Project the 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, the 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. Determine the needed housing mix and density ranges for each plan designation and the average needed net density for all structure types.
6. Estimate the number of additional needed units by structure type.

## Process

The HNA process was initiated at a kickoff management of City staff and the consultant in January 2022. PMT members continued to meet on regular basis over the course of the project to track progress on key tasks and deadlines, identify unanticipated issues and develop alternative approaches as needed.

The Winston Planning Commission acted as the advisory committee for the HNA project. The Planning Commission met three times in this capacity throughout the course of the project. The Planning Commission reviewed and provided comments on key materials and made recommendations related to housing implementation policies.

- At meeting #1 in March 2022, the Planning Commission viewed a presentation of demographic and housing trends in Oregon, Douglas County, and the City of Winston.
- At meeting #2 in May 2022, the Planning Commission viewed a presentation on the Residential Buildable Land Inventory and Residential Land Need Analysis.
- Meeting #3 was held as a joint City Council and Planning Commission work session in October 2022 to review draft housing policies for the City.

All Planning Commission meetings were advertised and open to the public. A flyer was prepared for meeting #2 and included in utility bills to promote the meeting and activities were provided to engage community members in the discussion.

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## Report Organization

This report provides the technical basis of findings that support proposed housing policy recommendations and subsequent actions that the city will take to update its Comprehensive Plan and Development Code. Each section of this report provides current data, assumptions and results that comprise all findings and conclusions:

**I. Introduction.**

**II. Housing Need Projection:** provides a demographic overview and summary of market trends influencing housing growth in Winston.

**III. Buildable Land Inventory:** identifies vacant, partially vacant and redevelopable residential land within the Winston UGB, and accounts for constraints to get to a final determination of capacity to meet 20-year needs.

**IV. Land Sufficiency Analysis:** this section compares expected land demand to vacant land supply to meet housing mix and densities described in the HNA.

**V. Findings and Recommendations** highlights key findings and draft housing policy recommendations.

# Housing Need Projection

## Methodology

The methodology for projecting housing needs within the Winston UGB includes consideration of demographic and socio-economic trends, housing market characteristics and long-range population growth projections.

Regional (Douglas County) and local (City or UGB) population, households, income and market characteristics are described in this memorandum using data provided by the U.S. Census Bureau (Census and American Community Survey), the U.S. Department of Housing and Urban Development (HUD), Oregon Department of Housing and Community Services (OHCS), Portland State University (PSU) and the City of Winston. Where trends or long-range projections are provided by an identified data source, this analysis includes extrapolations or interpolations of the data to arrive at a base year (2022 estimate) and forecast year (2042 projection). The result of this forecast translates population growth into households and households into housing need by dwelling type, tenancy (owner vs. renter) and affordability level.

## Demographic and Socio-Economics

### Population

The City of Winston recorded a record-high population of 6,049 in July 2020. Between 2010 and 2020, the population growth rate in the City outpaced Douglas County as a whole (Exhibit 1). Long-range population forecasts prepared by Portland State University anticipate that 1,779 new residents will be added to the Winston Urban Growth Boundary (UGB) over the next 20 years. This equates to a projected annual average growth rate (AGR) of 1.27% (Exhibit 2).

**Exhibit 1: Population Trends (2000-2020)**

	2000	2010	2020	2000-2020 AGR	2010-2020 AGR
Douglas County	100,399	107,667	114,003	0.64%	0.57%
Winston	4,613	5,571	6,049	1.36%	0.83%

**Sources:** Population Research Center, Portland State University, April 15, 2020

**Exhibit 2: Population Projections (2022-2042): Douglas County and Winston UGB**

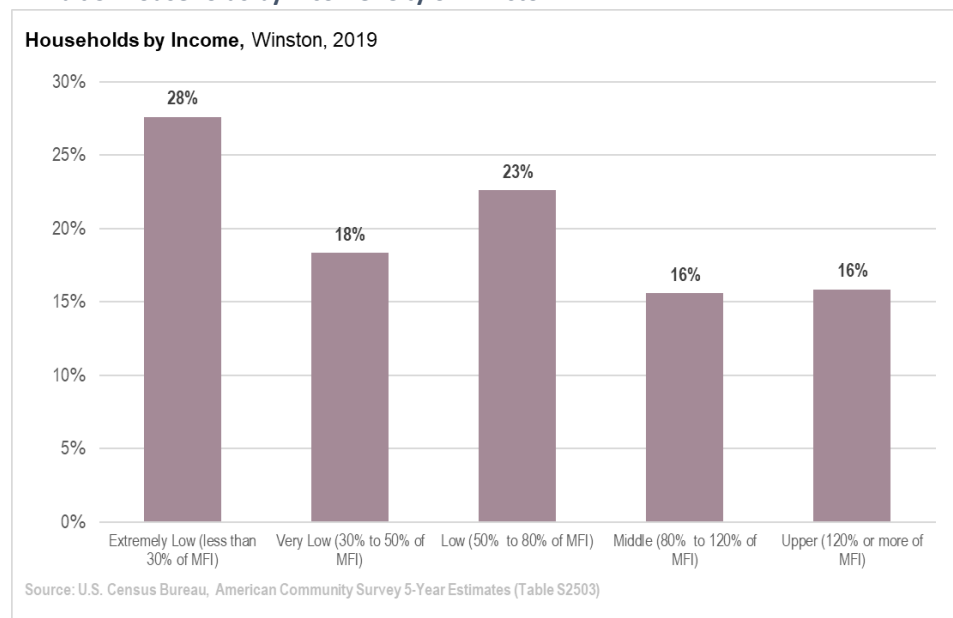
	2022	2042	2020-2040 AGR
Douglas County	115,073	126,344	0.47%
Winston	6,203	7,982	1.27%

**Sources:** Population Research Center, Portland State University

## Socio-economic Characteristics

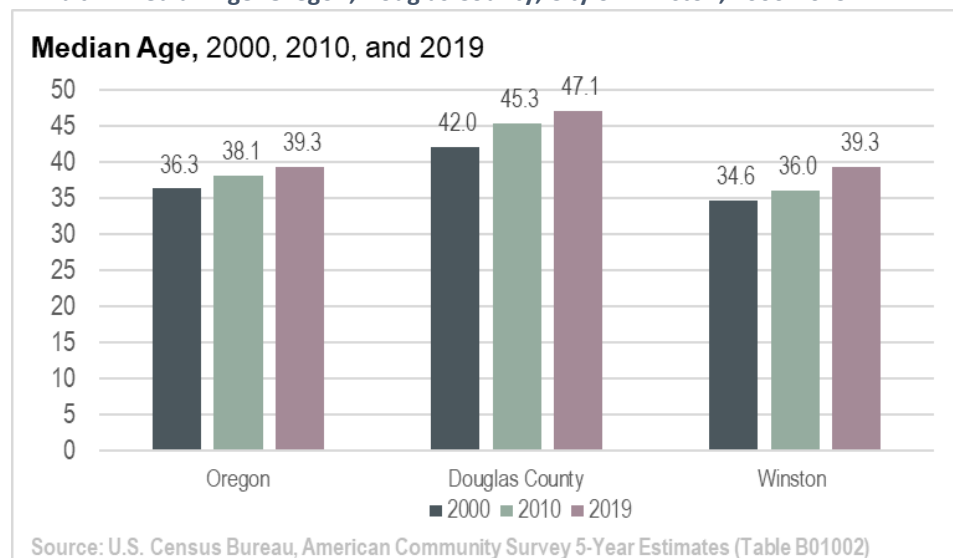
In 2019, the median family income (MFI) in Douglas County was \$56,200. As shown in Exhibit 3, nearly one third of the households in Winston earn more than 80% of the MFI (\$44,960 or above) while nearly 30% earn less than \$16,900 annually.

**Exhibit 3: Households by Income: City of Winston**



Winston has a relatively young population base. The median age in Winston (39.3) is well below the Douglas County (47.1) and is identical to the statewide average (Exhibit 4).

**Exhibit 4: Median Age: Oregon, Douglas County, City of Winston, 2000-2019**

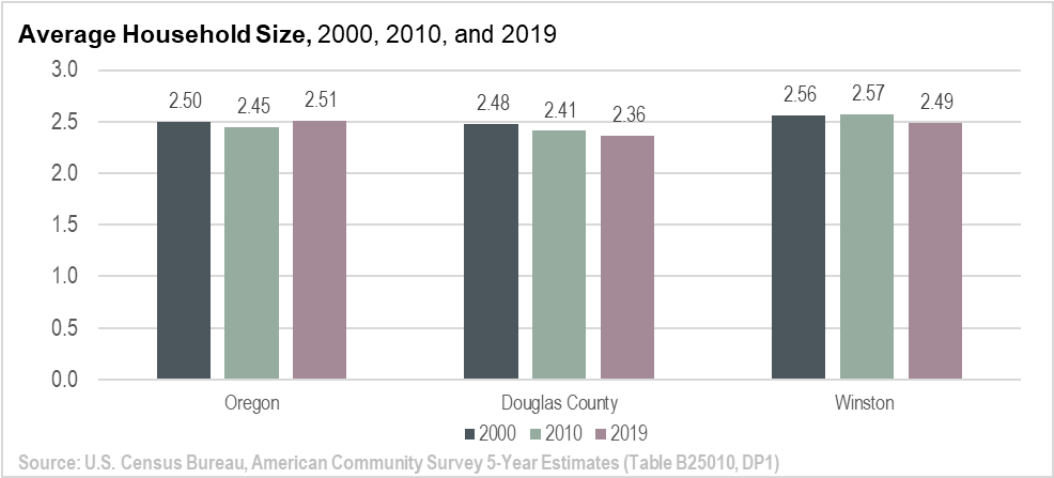


Average household size in Winston remained relatively steady over the last two decades, ranging between 2.49 and 2.57 residents per household. In 2019, there were 2.49 residents per



household, slightly below the statewide average of 2.51 and above the County average of 2.36 (Exhibit 5).

**Exhibit 5: Average Household Size: Oregon, Douglas County, City of Winston, 2000-2019**

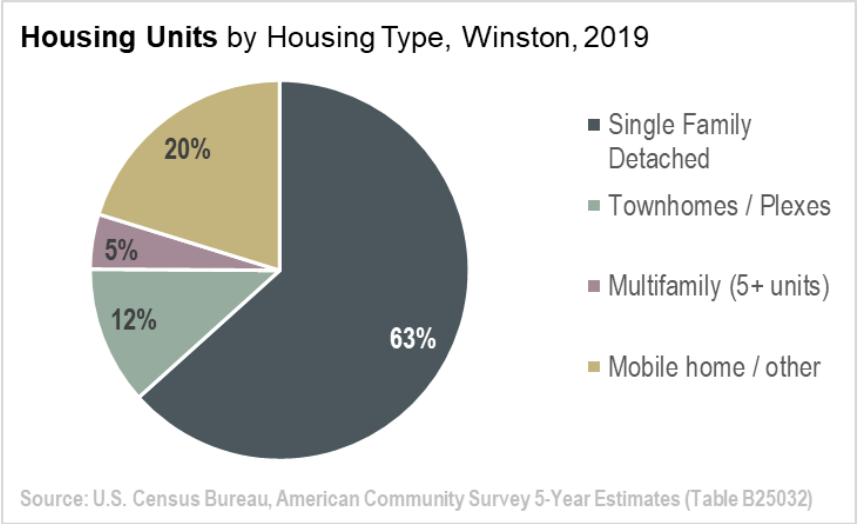


**Housing Inventory and Tenancy**

The current housing inventory and tenancy characteristics shed light on housing conditions and demand preferences. In 2019, there were 2,302 housing units in the City of Winston of which 2,162 units were classified as occupied and 140 units were classified as vacant.

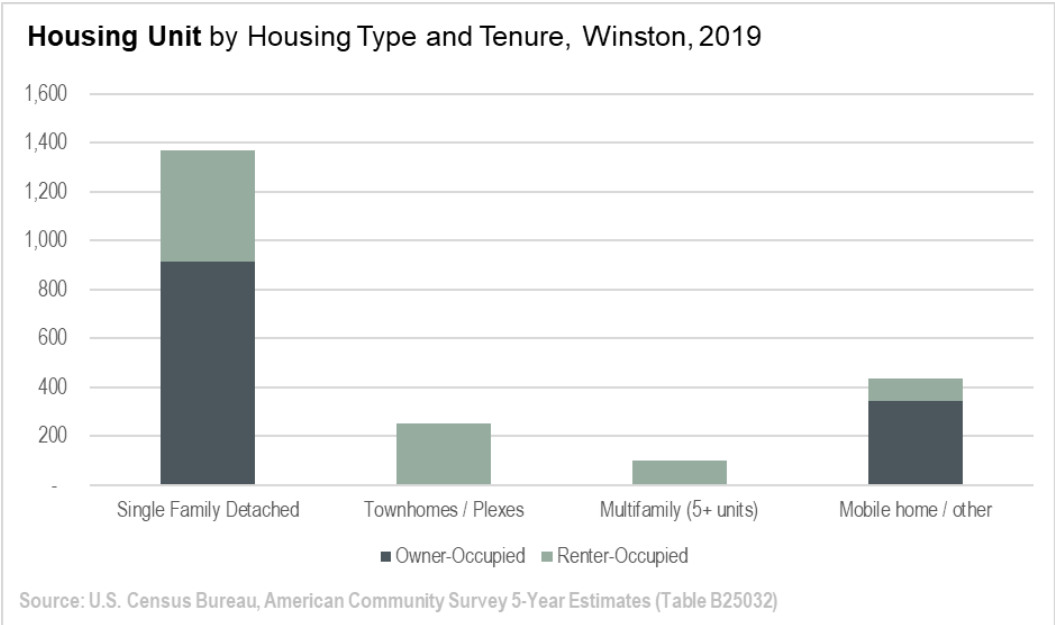
Like most small cities, single-family detached housing is the most prevalent housing type representing 63% of the housing stock in the City. The remaining housing inventory includes mobile homes (20%), townhomes and duplexes (12%), and multi-family (5%) as shown in Exhibit 6.

**Exhibit 6: Existing Housing Mix and Tenancy, 2015-2019, City of Winston**



Owner-occupied housing units represent 58% of the housing inventory while renter-occupied units account for the other 42% of the inventory (Exhibit 7).

**Exhibit 7: Existing Housing Mix: City of Winston**



## Housing Market Characteristics

To evaluate housing affordability and general attainability, we analyzed the median family income (MFI) for the local area using U.S. Housing and Urban Development (HUD) guidelines. Using assumptions shown below, an upper-middle income household earning 80% MFI should be able to afford a monthly housing cost of \$1,124 or less (Exhibit 8).

**Exhibit 8: Housing Affordability Analysis Assumptions**

Assumptions		
Interest Rate (conventional)	4.50%	
Downpayment	5%	
Mortgage duration (Years)	30	
Income Affordability Target Level %	30%	of median income
Property Taxes	0.0125	% of sales price
Mortgage Insurance	0.0085	% of loan amt.
Home Insurance	0.0029	% of sales price

The rents shown in Exhibit 9 are considered “attainable” if no more than 30% of household income is allocated to housing.

**Exhibit 9: Winston Affordable Housing Analysis: Renters**

<b>Douglas County Median Family Income Level (2019)*</b>	<b>\$56,200</b>	
<b>HUD Qualifying Income Level: Renters</b>	<b>Lower-end</b>	<b>Upper-End</b>
Upper (120% or more of MFI)	\$67,440 or more	
Middle (80% to 120% of MFI)	\$44,960	\$67,440
Low (50% to 80% of MFI)	\$28,100	\$44,960
Very Low (30% to 50% of MFI)	\$16,860	\$28,100
Extremely Low (less than 30% of MFI)	\$16,860 or less	
<b>Attainable Monthly Housing Cost: Renters (@30% of income)</b>	<b>Lower-end</b>	<b>Upper-End</b>
Upper (120% or more of MFI)	\$1,686 or more	
Middle (80% to 120% of MFI)	\$1,124	\$1,686
Low (50% to 80% of MFI)	\$703	\$1,124
Very Low (30% to 50% of MFI)	\$422	\$703
Extremely Low (less than 30% of MFI)	\$422 or less	

Monthly housing costs are much higher for homeowners than renters due to added costs associated with insurance and property taxes. If 30% of income is allocated to mortgage interest and principal, using the assumptions stated above, the expected housing cost for homeowners (with good credit and a 5% down payment) at an 80% MFI level is \$1,783. This level of investment would currently be sufficient to afford a home priced at no more than \$231,000 (Exhibit 10). However, there are few homes available at this price point.

**Exhibit 10: Winston Affordable Housing Analysis: Homeowners**

<b>Douglas County Median Family Income Level (2019)*</b>	<b>\$56,200</b>	
<b>HUD Qualifying Income Level: Renters</b>	<b>Lower-end</b>	<b>Upper-End</b>
Upper (120% or more of MFI)	\$67,440 or more	
Middle (80% to 120% of MFI)	\$44,960	\$67,440
Low (50% to 80% of MFI)	\$28,100	\$44,960
Very Low (30% to 50% of MFI)	\$16,860	\$28,100
Extremely Low (less than 30% of MFI)	\$16,860 or less	
<b>Supportable Housing Price: Mortgage Principal &amp; Interest</b>	<b>Lower-end</b>	<b>Upper-End</b>
Upper (120% or more of MFI)	\$346,000 or more	
Middle (80% to 120% of MFI)	\$231,000	\$346,000
Low (50% to 80% of MFI)	\$144,000	\$231,000
Very Low (30% to 50% of MFI)	\$87,000	\$144,000
Extremely Low (less than 30% of MFI)	\$87,000 or less	
<b>Monthly Housing Costs for Owners: PIT &amp; Insurance**</b>	<b>Lower-end</b>	<b>Upper-End</b>
Upper (120% or more of MFI)	\$2,279 or more	
Middle (80% to 120% of MFI)	\$1,520	\$2,279
Low (50% to 80% of MFI)	\$949	\$1,520
Very Low (30% to 50% of MFI)	\$571	\$949
Extremely Low (less than 30% of MFI)	\$571 or less	
<b>Min. Required Income Level: Owners</b>	<b>Lower-end</b>	<b>Upper-End</b>
Upper (120% or more of MFI)	\$91,170 or more	
Middle (80% to 120% of MFI)	\$60,803	\$91,170
Low (50% to 80% of MFI)	\$37,976	\$60,803
Very Low (30% to 50% of MFI)	\$22,827	\$37,976
Extremely Low (less than 30% of MFI)	\$22,827 or less	

\*Note, this analysis is generally consistent with 4-person household size.

\*\* See assumptions provided in supporting table.

Source: analysis by FCS Group using Housing and Urban Development data.

Home values in Winston have increased significantly in recent years. As indicated in Exhibit 11, median home price indices in Winston increased to \$276,000, increasing at 16.3% annually since 2020.

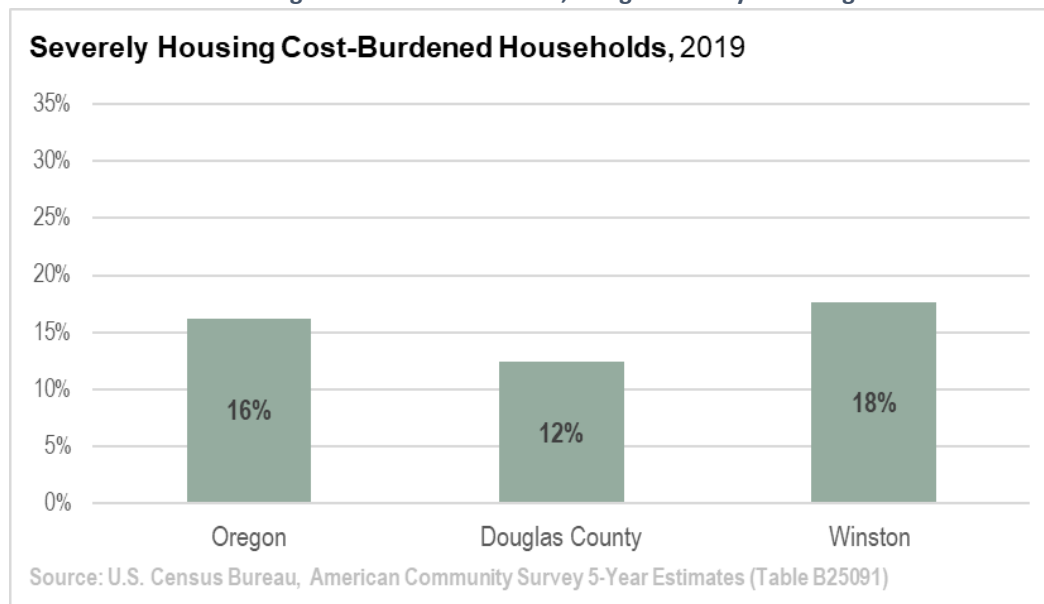
**Exhibit 11: Zillow Home Value Price Index in Select Markets**

	Jan-20	Jan-21	Jan-22	Annual Change %
Winston	\$204,000	\$226,000	\$276,000	16.3%
Roseburg	\$239,000	\$262,000	\$319,000	15.5%
Myrtle Creek	\$192,000	\$216,000	\$267,000	17.9%
Sutherlin	\$236,000	\$257,000	\$321,000	16.6%
Grants Pass	\$296,000	\$340,000	\$416,000	18.5%

Source: Zillow.com; analysis by FCS 2/24/22

HUD defines “severe housing cost burdens” to include households that pay more than 50% of their annual income on housing costs. As shown in Exhibit 12, approximately 18% of Winston households are severely housing cost burdened, which is slightly higher than the County and state average.

**Exhibit 12: Severe Housing Cost Burdens: Winston, Douglas County and Oregon**



## Housing Needs

### Summary of Housing Needs

The Winston housing needs forecast is based on the PSU population projections described earlier and the current household size (2.49 people per dwelling) and current group quarters allocation (estimate held constant into the future). The forecast also assumes that the current ratio of seasonal-to-permanent housing demand remains constant. The projected net new housing need in Winston

equates to approximately 745 housing units. In addition, we would anticipate that there will also be an additional 10 people living in group quarters by 2042 (see Exhibit 13).

Group quarters developments (includes people residing in congregate care facilities, correctional institutions, and housing shelters) would likely occur within commercial, mixed-use, or institutional land use zones.

**Exhibit 13: Winston UGB Housing Needs Forecast**

	2022	2042	Change
Winston UGB Population	6,224	7,974	1,751
Less Group Quarters (0.6%)	35	45	10
Pop in Households	6,189	7,930	1,741
Avg. Household Size	2.49	2.49	2.49
Households (year round)	2,485	3,185	699
Vacancy and Seasonal Housing Assumption	6%	6%	46
Growth-related Housing Demand (dwelling units)	<b>2,648</b>	<b>3,392</b>	<b>745</b>

**Source:** Previous Tables

### Housing Demand by Dwelling Type and Tenancy

This baseline housing need forecast is generally consistent with the observed mix of housing types in Winston. Additional housing forecast scenarios may be considered during the planning process to consider potential new policy objectives, such as:

- Ability to provide adequate infrastructure (water, sewer, and road capacity) to create new planned unit developments or single-family subdivisions.
- Changes in rural land use designations to create additional opportunities for middle housing types, such as duplexes and townhomes.

The baseline housing forecast predicts a range in the demand for housing types to address market preferences. The housing demand will be: 489 single-family detached homes (including small lot and standard lot subdivisions); 82 townhomes/duplexes; 33 multifamily units (apartments); and 141 manufactured housing units (Exhibit 14). In addition, it is anticipated that there will also be the need to accommodate approximately 10 people in some form of group quarters housing (such as single room occupancy units, congregate care, in-patient care, etc.).

**Exhibit 14: Projected Housing Needs by Tenure & Housing Type: Winston UGB**

	Owner- Occupied Dwelling Units	Renter- Occupied Dwelling Units	Seasonal & Vacancy Allowance (Units)	Projected 20- Year Need (Units)
<b>Housing Type Distribution</b>				
Single Family Detached	296	147	46	489
Townhomes / Plexes	-	82	-	82
Multi-family (5+ units)	-	33	-	33
Mfg. homes	112	30	-	141
<b>Total</b>	<b>408</b>	<b>291</b>	<b>46</b>	<b>745</b>
Group quarters (pop)				<b>10</b>

U.S. Census, American Community Survey 5-Year Estimates (Tables B25032 and CP04) & previous tables.

Exhibit 15 identifies that housing products that are most consistent with the projected housing need for Winston. This housing needs forecast for Winston will be refined during the planning process with input from the City as well as the Housing Advisory Committee and the public at large.

**Exhibit 15: Projected Housing Demand by Income Level, Winston UGB**

Housing Type	Owner- Occupied Dwellings	Renter- Occupied Dwellings	Total Dwelling Units	Attainable Housing Products
Upper (120% or more of MFI)	217	38	255	Standard Homes
Upper Middle (80% to 120% of MFI)	130	50	180	Cottage Homes, Townhomes, Apartments
Lower Middle (50% to 80% of MFI)	87	94	180	Townhomes, Mfgd. Homes, Plexes, Apts.
Low (less than 50% of MFI)	0	65	65	Govt. Assisted Apts. & ADUs
Very Low (less than 30% of MFI)	0	64	64	Govt. Assisted Apts. & ADUs
<b>Total</b>	<b>434</b>	<b>311</b>	<b>745</b>	

Source: estimates by FCS based on prior tables and stated assumptions. Does not reflect group quarters housing demand for 10 net new people.

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# Buildable Land Inventory

In accordance with OAR 660-008-0005 (2), an estimate of buildable land inventory (BLI) within the Winston Urban Growth Boundary (UGB) has been created to determine that amount of land available to meet housing needs. The BLI analysis uses the most current Geographic Information Systems (GIS) data provided available for the Winston UGB.

## Methodology

The objective of the Buildable Land Inventory (BLI) is to determine the amount of developable land available for future residential housing development within the UGB. The steps taken to perform this analysis are as follows:

1. Calculate gross acres by plan designation, including classifications for fully vacant and partially-vacant parcels. This step entails “clipping” all of the tax lots that are bisected by the current UGB to eliminate land outside current UGB from consideration for development at this time. City staff input was provided to provide a level of quality assurance to review output is consistent with OAR 660-008-0005(2).
2. Calculate gross buildable acres by plan designation by subtracting land that is constrained from future development, such as such as existing public right-of-way, parks and open space, steep slopes, and floodplains. In addition, the analysis excludes any land identified with a “Public Reserve” zoning classification.

### Residential Land Base

The residential land base reflects current Winston Comprehensive Plan land use designations. Properties that are within the residential land base include the following base residential zone classifications:

- Low Density B
- Low Density A
- Medium Density
- High Density

### Land Classifications

The next step in the BLI analysis includes classifying each tax lot (parcel) into one of the following categories. In some cases, tax lots had to be split to accompany different plan classifications. Split tax lots are treated as individual and might go into any of the categories described below.

Vacant land: Properties with no structures or have buildings with very little value. For purpose of the BLI, residential lands with improvement value less than \$10,000 are considered vacant. These lands were also subjected to review using satellite imagery via Google Earth; and if the

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land is in a committed use such as a parking lot, an assessment has been made to determine if it is to be classified as vacant, part vacant or developed.

Partially vacant land: Properties that are occupied by a use (e.g., a home or building structure with value over \$10,000) but have enough land to be subdivided without the need for rezoning. This determination is made using tax assessor records and satellite imagery. For Single Family lots, it is assumed that ¼ acre (10,890 sq. ft.) is retained by each existing home, and the remainder is included in the part vacant land inventory. For non-single family uses aerial imagery was used to determine the size of the unused portion.

Redevelopment Potential: Occupied properties with a higher land value than the on-site structure. Properties must be at least 20,000sqft to be considered of interest for redevelopment.

Developed: Properties unlikely to yield additional residential development for one of two reasons: they possess existing structures at densities that are unlikely to redevelop over the planning period; or they include parcels with Comprehensive Land Use Plan designations that do not permit housing development.

Other: Properties which are regarded as unlikely to be developed because they are restricted by existing uses such as: non-residential zoned vacant lots, tribal lands, public parks, schools, ballfields, roads and public right-of-way (ROW); common areas held by Homeowners Associations, cemeteries, power substations, and constrained by more than 85% of its area.

These tax lot classifications were validated using satellite imagery, street view, and assessor records. Preliminary results were refined based on City staff and public input received during the Housing Needs Analysis (HNA) planning process.

### **Development Constraints**

The BLI methodology for identifying and removing development constraints is consistent with state guidance on buildable land inventories per OAR 660-008-0005(2) as well as 660-038-0070. By definition, the BLI is intended to include land that is “suitable, available, and necessary for residential.” “Buildable Land” includes residential designated land within the UGB, including vacant, part vacant and land that is likely to be redeveloped; and suitable, available and necessary for residential uses.

Public-owned land is generally not considered to be available for new growth unless the underlying zoning permits it. Winston is unique in several ways. Much of its buildable land is in the Agriculture/Open Space (A-O) zone classification that allows a small amount of residential use in conjunction with a permitted farm use. A significant portion of the Agriculture/Open Space zone classification is home to Wildlife Safari, a large area of private recreational land.



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It is believed that when the Comprehensive Plan was originally put in place, there were transitional farm operations that wanted to be recognized. These situations have long since been mitigated and are no longer a factor. Representatives from the City and the DLCDC agree that this designation has no place in an urban jurisdiction. Therefore, all A-O zoned land was removed from the inventory.

There is also more than 550 acres of land within the Winston city limits that is owned by the Cow Creek Band of Umpqua Tribe of Indians and much of the vacant land is zoned for A-O, Highway Commercial and High Residential uses. As the Tribe is a sovereign nation, the city has no jurisdiction over this land it was removed from the inventory.

It should be noted that “available” in this context does not mean that the land is presently on the market. It is assumed in this analysis that such land is expected to come on the market within the 20-year timeframe of this study. Land is considered to be “suitable for new development” unless it:

- Severely constrained by natural hazards as determined by the Statewide Planning Goal 7;
- Subject to natural resource protection measures determined under Statewide Planning Goals 5, 6, 15, 16, 17 or 18;
- Has slopes over 25 percent;
- Within the 100-year flood plain; or
- Cannot be provided or served with public facilities

Based on state guidelines and data provided by the City of Winston, the following constraints have been deducted from the residential lands inventory.

- Open water of at least one-half acre in size.
- Land within the 100-year floodplains.
- Land identified in the zoning code as Public Reserve.
- Land with slopes greater than 25%.

## Residential Buildable Land Inventory Results

A summary of the land base by plan designation is provided in Exhibit 16. The findings indicate there is a total of 1,132 acres zoned for residential uses in Winston, including 688 gross developed acres and 377 gross vacant acres.

**Exhibit 16: Residential Land Base by Zone Designation, Winston UGB**

Zone Designation	Developed	Other	Vacant	Total
Residential Low Density A & B	471	24	206	700
Residential Medium Density	157	17	134	308
Residential High Density	60	27	37	124
<b>Total</b>	<b>688</b>	<b>68</b>	<b>377</b>	<b>1,132</b>

Source: Winston Buildable Land Inventory; 3J Consulting

Other Environmental constraints (slopes, floodplains, wetlands, etc.) are removed from gross vacant acres. Results summarized in Exhibit 17 indicate that after accounting for development constraints, the Winston UGB has 308 acres of vacant buildable residential land.

**Exhibit 17: Vacant Land by Zone Designation, Winston UGB**

Zone Designation	Vacant	Constrained	Buildable Vacant
Residential Low Density A & B	206	40	166
Residential Medium Density	134	53	81
Residential High Density	37	7	31
<b>Total</b>	<b>377</b>	<b>100</b>	<b>277</b>

Source: Winston Buildable Land Inventory; 3J Consulting

In addition to vacant land, the BLI also includes partially-vacant and redevelopable land categories. As noted above, partially-vacant land includes properties that are occupied by a use (e.g., a home or building structure with value over \$10,000) with enough land to be subdivided without the need for rezoning. Properties with redevelopment potential are occupied properties with a higher land value than the on-site structure. Properties must be at least 20,000sqft to be considered of interest for redevelopment. After removing environmental constraints there are 193 part-vacant acres that could be subdivided for development and 4 acres with redevelopment potential, as shown in Exhibit 18.

**Exhibit 18: Par-Vacant Buildable Land and Future Public Facilities Allowance, Winston UGB**

Zone Designation	Partial Vacant	Redevelopment	Buildable Part-Vacant / Redev
Residential Low Density A & B	104	3	106
Residential Medium Density	80	0	80
Residential High Density	9	1	10
<b>Total</b>	<b>192</b>	<b>4</b>	<b>196</b>

Source: Winston Buildable Land Inventory; 3J Consulting

### Total Developable Residential Land

Exhibit 19 shows the combination of net developable vacant, part-vacant, and redevelopable residential lands in the Winston UGB. The final deduction to the BLI, includes a 25% allowance for future public facilities and future right-of-way. The Winston UGB has a buildable land inventory of 205 acres of Low Density land, 121 acres of Medium Density land, and 31 acres of High Density

land. Conclusions regarding the sufficiency of this buildable land inventory will be drawn in the next chapter.

**Exhibit 19: Net Buildable Vacant and Part-Vacant Residential Land, Winston UGB**

Zone Desingation	Unconstrained Vacant Land (gross acres)	Part Vacant Land (gross acres)	Redevelopment Land (gross acres)	Total Vacant, Part Vacant & Redevelopment Land (acres)	Future Public Facilities Allowance	Total Net Buildable Vacant Land
Residential Low Density A & B	166	104	3	273	(68)	205
Residential Medium Density	81	80	0	161	(40)	121
Residential High Density	31	9	1	41	(10)	31
<b>Total</b>	<b>278</b>	<b>193</b>	<b>4</b>	<b>475</b>	<b>(118)</b>	<b>357</b>

Source: Winston Buildable Land Inventory; 3J Consulting

### Buildable Land by Lot Size

Exhibits 20 and 21 show vacant and part-vacant land broken down by lot size. This is an important consideration given that, for example, a planned unit development yielding dozens of housing units can only occur on a relatively large, contiguous piece of land. The figures below show acreage figures prior to the 25% allowance for public facilities.

Exhibit 20 indicates that over three quarters of buildable vacant land (184 acres) is on lots of more than ten acres. The remaining 20% of vacant developable land is more equally distributed between lots of five to ten acres (36 acres) and lots of less than five acres (57 acres). The large majority of vacant lots (81%) are less than one acre.

**Exhibit 20: Vacant Buildable Land by Lot Size, Winston UGB**

Zone Designation	<1 acre		1 - 5 acres		5 - 10 acres		>=10 acres	
	Acres	Lots	Acres	Lots	Acres	Lots	Acres	Lots
Residential Low Density A & B	19	104	20	13	6	1	121	6
Residential Medium Density	6	29	6	3	17	3	52	3
Residential High Density	4	11	2	1	13	2	12	1
<b>Total</b>	<b>29</b>	<b>144</b>	<b>28</b>	<b>17</b>	<b>36</b>	<b>6</b>	<b>184</b>	<b>10</b>

Source: Winston Buildable Land Inventory; 3J Consulting

Exhibit 21 shows that more than half of buildable part-vacant land (102 acres) is on lots of more than ten acres. Approximately 95% of part-vacant lots are less than five acres. There is only one lot between five and ten acres.

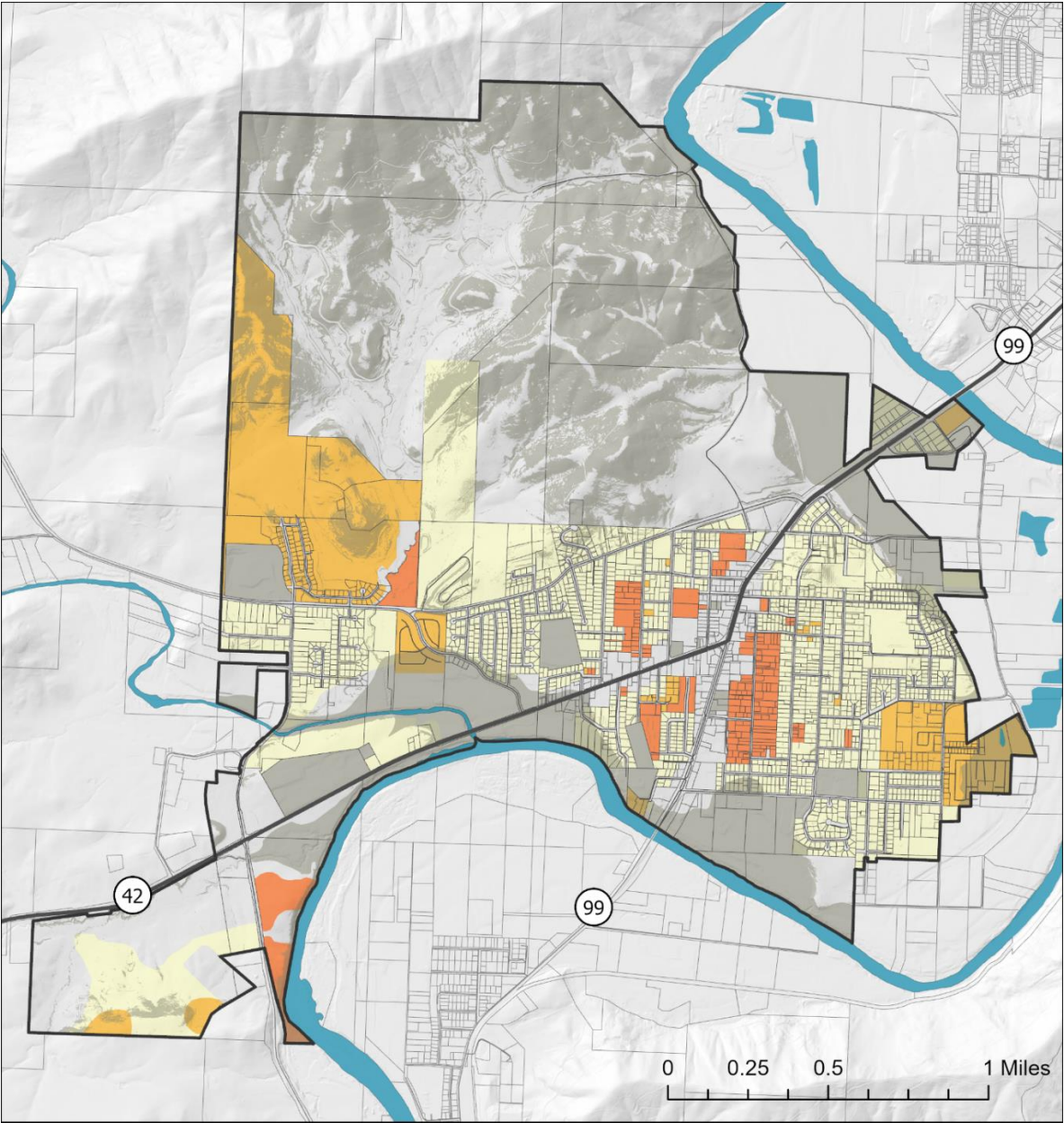
**Exhibit 21: Part Vacant Buildable Land by Lot Size, Winston UGB**

Zone Desingation	<1 acre		1 - 5 acres		5 - 10 acres		>=10 acres	
	Acres	Lots	Acres	Lots	Acres	Lots	Acres	Lots
Residential Low Density A & B	25	55	41	29	6	1	32	2
Residential Medium Density	2	4	9	5	0	0	69	3
Residential High Density	3	8	5	4	0	0	0	0
<b>Total</b>	<b>30</b>	<b>67</b>	<b>55</b>	<b>38</b>	<b>6</b>	<b>1</b>	<b>102</b>	<b>5</b>

Source: Winston Buildable Land Inventory; 3J Consulting

Exhibit 22 illustrates an estimate of residential buildable land inventory (BLI) within Winston’s Urban Growth Boundary (UGB) to determine the amount of land available to meet housing needs.

**Exhibit 22. Residential Buildable Land Inventory, Winston UGB, 2019**



- Highway
- Road
- UGB (2019)
- Parcels
- Open Water
- Constraints

- Buildable Land**
- Zoning**
- Residential Low Density A & B
  - Residential Medium Density
  - Residential High Density

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# Residential Land Need Analysis

This section provides an estimate of residential development capacity (measured in new dwelling units) and an estimate of the ability of the Winston UGB to accommodate needed new housing units for the 2020 to 2040 period, based on the analysis in the housing needs.

## Methodology

This Memorandum compares the 20-year residential land needs (demand) relative to the residential BLI (supply). This provides a means of reconciling housing land demand with buildable land supply within the Winston UGB. The evaluation of UGB land requirements to accommodate the planned housing need included three steps.

**Step 1** takes into account the forecasted number of dwelling units by housing type, including single family detached, townhomes and plexes, multifamily, and manufactured homes as well as group quarters population (see Exhibit 1).

**Step 2** considers the amount of land required to accommodate the future housing demand based on the expected average development density for each general housing type (see Exhibit 17).

**Step 3** includes a comparison (reconciliation) between the land need determined in Step 2 and the residential buildable land inventory presented in Section 3 of the HNA.

## Housing Need Forecast

As discussed above, the forecasted housing mix for Winston includes 745 housing units along with 10 group quarters units. This results in net new housing development as follows:

- Single Family Detached: 489 dwellings (including standard and small lot single family detached housing)
- Townhomes and Plexes: 82 dwelling units
- Manufactured Homes: 141 dwellings
- Multifamily: 43 dwelling units (includes apartments and condominiums with 5+ units per structure as well as group quarters units).

## Residential Land Need Summary

The second step in the reconciliation of land needs estimates the amount of net buildable land area required to address the housing growth forecast. This step applies average density assumptions based on Winston local experience (dwellings per acre) to each of the general residential development categories listed in Step 1 to arrive at a total residential land need forecast.

As shown in Exhibit 24, the forecasted housing need (755 total dwelling units) is expected to require at least 151 acres of buildable land area.

**Exhibit 24: Winston Residential Classifications and Density Assumptions**

Dwelling Type	20-Year Dwelling Unit Demand	Applicable Plan Designation	Applicable Local Zones	Allowable Density (gross DU per Ac)	Avg. Development Density (net DU per Ac)	Net Buildable Land Requirement (net acres)
Single Family Detached	489	Res. (3.0, 4.5)	Res. Low Density A & B	3 to 6	4.0	122
Townhomes / Plexes	82	Res. (7.0)	Res. Medium Density	6 to 12	7.0	12
Manufactured homes	141	all of above	all of the above	6 to 12	10.0	14
Multifamily (5+ units)	33	Res. (16)	Res. High Density	14 to 24	18.0	2
Group quarters (@1 people per unit)	10	varies	varies	varies	10.0	1
<b>Total</b>	<b>755</b>					<b>151</b>

Source: interpretation of current zoning code and housing development/market conditions.

## UGB Sufficiency Analysis

Since the current UGB includes 357 net acres of land supply and the future residential land need forecast is for 151 acres, we can conclude that there is an overall residential land surplus of approximately 206 acres at this time, as shown in Exhibit 25. The BLI findings indicate that the existing amount of vacant and part vacant land within the Winston UGB is generally sufficient to accommodate planned 20-year housing needs.

Exhibit 25: Reconciliation of Land Inventory by Land Use Designation, Winston UGB

Projected 20-year Land Sufficiency for Housing, Winston UGB

Dwelling Unit Type	Applicable Zone Designation	Applicable Plan Designation	Net Buildable Land Requirement (net acres)	Net Buildable Land Inventory (net acres)	Net Buildable Land Surplus (net acres)
Single Family	Res. Low Density A & B	Res. (3.0, 4.5)	122	205	83
Townhomes / Plexes	Res. Medium Density	Res. (7.0)	12	121	109
Manufactured home	all of the above	all of the above	14	*	*
Multifamily (5+ units)	Res. High Density	Res. (16)	2	31	14
Group quarters (@1 people per unit)	varies	varies	1		*
<b>Total</b>			<b>151</b>	<b>357</b>	<b>206</b>

\* analysis assumes these housing types are primarily developed in multifamily zones

\*\* analysis assumes group quarters housing types are developed in multifamily zones.



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# Findings and Recommendations

## Key Findings

Winston's population growth over the next 20 years will result in new households that will require additional housing. Key findings of the housing needs analysis include:

- Winston's population is forecast to grow at 1.27% per year over the next two decades, adding approximately 1,779 new residents.
- Population growth will require the addition of 745 new dwelling units between 2022 and 2042.
- The forecasted housing mix that addresses 20-year demand is expected to consist of: 489 single-family detached homes, 82 townhomes/plexes, 33 multifamily housing units and 141 manufactured housing units.
- The share of those making 80% or less of the median family income level for Douglas County (\$56,200) was represented by over 69% of Winston's households in 2019.
- Nearly 1 in 4 renter households in Winston are severely rent burdened with over 50% of their income going towards monthly housing costs.
- The results of the housing needs analysis indicate that the current Winston UGB is sufficient to accommodate future housing needs. However, when you consider the fact that about 127 acres of the gross buildable land supply within the UGB are partially constrained by moderate slopes (15% to 25%), it is apparent that construction and public facility costs can vary significantly between sites throughout the UGB. This level of variation in site buildability and cost could impact the amount of development density that can be achieved on specific sites.
- The City of Winston should study the inventory of land designated with Agriculture/Open Space (A-O) zoning and pursue a comprehensive plan map amendment to apply urban zone designations to the area.

## Housing Policy Recommendations

The purpose of the draft housing policy recommendations is to strengthen and renew the City of Winston's intention to help foster development of a wide variety of housing to meet the needs of the community. Recommendations are intended to supplement or replace the existing housing policies contained within the Winston Comprehensive Land Use Plan. Proposed additions are underlined and deletions are struck through.

A. GOAL: TO ENSURE THAT WINSTON'S HOUSING STOCK IS MAINTAINED AT A STANDARD LEVEL

### POLICIES

1. Encourage the quick replacement of all dilapidated or inadequate housing.



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2. Continue to encourage the rehabilitation of deteriorating housing through an incentive program that ~~would~~ rewards maintenance and repair.
  3. Consider adopting a housing code with minimum standards that ~~would~~ protects residents, but allows for new and innovative techniques to reduce the cost of housing and reduce the rate of deterioration.
  4. As funds become available, ~~the City shall~~ actively pursue methods of expanding and continuing the rehabilitation program for houses that need work in order to remain safe dwelling units.

B. GOAL: TO ENABLE ALL MEMBERS OF THE COMMUNITY TO LIVE IN HOUSING APPROPRIATE TO THEIR NEEDS.

POLICIES

1. Encourage innovative designs for various types of multi-family housing in order to meet the diverse needs of smaller households (the elderly, young families, etc.).
2. Explore public and private means of providing needed housing for the elderly and low income households and recommend mix as needed.
3. Investigate additional development standards for Recreational Vehicle (RV) parks.
4. ~~The city~~ Encourage and recognize government assisted housing as a source of affordable, safe, and sanitary housing opportunities for low, moderate, and fixed income households.
5. Encourage an increase in the proportion of higher-end value housing in the mix of affordable housing stock by:
  - a. Identifying the optimum percentage of houses in various price ranges.
  - b. Identifying properties within the UGB that are suitable for siting higher-value homes.
  - c. Supporting development of an appropriate number of higher-valued homes on identified properties.
6. Identify appropriate housing needs and develop non-traditional housing standards as they arise.
7. Ensure the land use code includes “clear and objective” standards for housing development and does not have the effect of discouraging needed housing through unreasonable cost or delay or reducing the proposed housing density already allowed by zoning.
8. Ensure existing manufactured home parks, including tiny homes, continue to be allowed within the locational criteria of the land use code and protected from redevelopment to maintain Winston’s existing affordable housing stock.
9. Streamline the permitting process to reduce cost and delay of new housing units.
10. Promote the development of accessory dwelling units as a means to contribute to the overall housing stock and rental market.
11. Allow manufactured homes on individual lots to increase housing choices.
12. Identify public owned properties that could be used for affordable housing.
13. Consider scaling SDCs according to dwelling size.

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14. Monitor annually the number of total housing units, regulated affordable units, multifamily units, regulated affordable multifamily units and single family units, and regulated affordable single family units.

C. GOAL: TO LOCATE FUTURE HOUSING SUCH THAT AVAILABLE LAND IS BOTH USED EFFICIENTLY AND DEVELOPED FOR A HIGH DEGREE OF LIVABILITY

POLICIES

1. Plan for a 20-year supply of suitable land for Winston to meet housing needs through regular monitoring and adjustments of available residential land.
2. Develop and implement a system to monitor the supply of residential land every two years. This includes monitoring residential development (through permits) and land consumption (e.g., development on vacant or redevelopable lands).
3. Explore opportunities to remove undevelopable land from the buildable land inventory, including comprehensive plan amendments, rezoning and land exchanges.
4. Encourage “in-fill” of existing residential areas through incentives for new construction in already serviced areas.
5. Identify areas of high priority for improving infrastructure to support new residential development, focusing on opportunities for new development in higher density zones. Particularly in areas with vacant land zoned for housing.
6. Plan Map amendments that apply a non-residential designation to properties adjacent to residential designated property should consider reasonable mitigation methods to promote the overall livability of adjacent residential properties.
  - a. Reasonable mitigation methods include the consideration of special setbacks or other measures to address livability issues.
  - b. Mitigation methods should be applied only if the existing protection provided in the proposed zone is found inadequate and those special setbacks or other measures are necessary to protect the overall livability of the adjoining residential properties.
7. Consider adopting an overlay zoning for Planned Residential Developments which would allow mixed densities, clustering and other innovative techniques for developments of a certain minimum size.
8. Encourage the location of high-density residential uses near services, amenities, and transportation corridors. ~~commercial areas and public facilities, with lower densities radiating away from these activity centers.~~
9. Encourage senior housing projects ~~should be encouraged~~ to locate in areas convenient to local commercial areas.
10. ~~Encourage the location of physician, dental offices and other low vehicle but high pedestrian traffic in residential areas.~~

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# Glossary

**Accessory Dwelling Unit (ADU):** A small living space located on the same lot as a single-family house.

**Buildable Lands Inventory (BLI):** An assessment of the capacity of land within the city's Urban Growth Boundary to accommodate forecasted housing and employment needs.

**Buildable Residential Land:** Includes land that is designated for residential development that is vacant and part-vacant and not constrained by existing buildings or environmental issues.

**Constrained land:** Land that is unavailable for future net new residential development based on one or more factors, such as environmental protections, public lands, floodplains, or steep slopes.

**Cost Burdened:** Defined by US Department of Housing and Urban Development (HUD) as households who spend over 30% of their income on housing.

**Cottages:** Small, single-level, detached units, often on their own lots and sometimes clustered around pockets of shared open space. A cottage is typically under 1,000 square feet in footprint.

**Density:** Defined by the number of housing units on one acre of land.

**Development density:** Expected number of dwelling units (per acre) based on current zoning designations.

**Exempt Land:** Land which is unavailable for development based on ownership (e.g., the city owns the land and it is either a park or intended to be a park) or which is otherwise owned by a public entity and is not intended for housing (e.g., land owned by a port, school district, etc.).

**Family:** A group two or more people (one of whom is the householder) related by birth, marriage, or adoption and residing together.

**High Density:** Lots with the average density of 12+ dwelling units per acre. Best suited for multifamily housing such as apartments and condominiums.

**Housing Needs Analysis (HNA):** The Housing Needs Analysis consists of four distinct reports that analyze the state of housing supply, housing affordability issues and the City's ability to meet projected housing demand going into 2040.

**Housing Unit (or Dwelling Unit):** A house, an apartment or other group of rooms, or a single room is regarded as a housing unit when it is occupied or intended for occupancy as separate living quarters; that is, when the occupants do not live and eat with any other person in the structure and there is direct access from the outside or common hall.

**Household:** Consists of all people that occupy a housing unit.

**HUD:** Acronym for US Department of Housing and Urban Development, the federal agency dedicated to strengthening and supporting the housing market.

**Low Density:** Lots with the average density of 3-4 dwelling units per acre. Best suited for family housing such as single-family detached homes.

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**Manufactured Housing:** is a type of prefabricated home that is largely assembled of site and then transported to sites of use. The definition of the term in the United States is regulated by federal law (Code of Federal Regulations, 24 CFR 3280): "Manufactured homes are built as dwelling units of at least 320 square feet in size, usually with a permanent chassis to assure the initial and continued transportability of the home. The requirement to have a wheeled chassis permanently attached differentiates "manufactured housing" from other types of prefabricated homes, such as modular homes.

**Manufactured Home Park (or manufactured home park):** a local zoning designation that is specifically intended to address demand for this housing type. OAR chapter 813, division 007 is adopted to implement section 9, chapter 816, Oregon Laws 2009, and sections 2, 3 and 4, chapter 619, Oregon Laws 2005, as amended by sections 10 to 12, chapter 816, Oregon Laws 2009, and sections 19, and 21, chapter 503, Oregon Laws 2011 for the purpose of regulating manufactured dwelling parks.

**Median Family Income (MFI):** The median sum of the income of all family members 15 years and older living in the household. Families are groups of two or more people (one of whom is the householder) related by birth, marriage, or adoption and residing together; all such people (including related subfamily members) are considered as members of one family.

**Medium Density:** Lots with the average density of 6-12 dwelling units per acre. Best suited for small lot housing such as single family attached, townhomes, plexes and cottages.

**Mixed Use:** Characterized as two or more residential, commercial, cultural, institutional, and/or industrial uses into one combined building or building(s) on the same parcel of land.

**Multi-Family Housing:** Stacked flats in a single buildings or groups of buildings on a single lot. Parking is shared, and entrance to units is typically accessed through a shared lobby.

**Oregon Administrative Rules (OAR):** Administrative Rules are created by most agencies and some boards and commissions to implement and interpret their statutory authority (ORS 183.310(9)). Agencies may adopt, amend, repeal or renumber rules, permanently or temporarily. Every OAR uses the same numbering sequence of a three-digit chapter number followed by a three-digit division number and a four-digit rule number. For example, Oregon Administrative Rules, chapter 166, division 500, rule 0020 is cited as OAR 166-500-0020. ([oregon.gov](http://oregon.gov))

**Part-vacant land:** Unconstrained land that has some existing development but can be subdivided to allow for additional residential development.

**Plexes and Apartments:** Multiple units inside one structure on a single lot. Usually, each unit has its own entry.

**Seasonal dwellings:** These units are intended by the owner to be occupied during only certain seasons of the year. They are not anyone's usual residence. A seasonal unit may be used in more than one season; for example, for both summer and winter sports. Published counts of seasonal units also include housing units held for occupancy by migratory farm workers. While not currently intended for year-round use, most seasonal units could be used year-round.

**Severely Cost Burdened:** Defined US Department of Housing and Urban Development (HUD) as households who spend over 50% of their income on housing.

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**Single Family Attached:** Dwelling units that are duplexes without a subdividing property line between the two to four housing units. “Attached” duplexes require a single building permit for both dwelling units. The “attached” units would be addressed with one numerical street address for the overall structure with separate alpha-numeric unit numbers for each dwelling.

**Single Family Detached:** Free standing residential building, unattached, containing separate bathing, kitchen, sanitary, and sleeping facilities designed to be occupied by not more than one family, not including manufactured and mobile homes.

**Townhome (also known as duplexes, rowhouse, etc.):** Attached housing units, each on a separate lot, and each with its own entry from a public or shared street or common area.

**Urban Growth Boundary (UGB):** Under Oregon law, each of the state’s cities and metropolitan areas has created an urban growth boundary around its perimeter – a land use planning line to control urban expansion onto farm and forest lands.

**Vacant housing unit:** A housing unit is vacant if no one is living in it at the time of enumeration unless its occupants are only temporarily absent. Units temporarily occupied at the time of enumeration entirely by people who have a usual residence elsewhere are also classified as vacant.

**Vacant land:** Vacant and part-vacant land identified within the local buildable land inventory that is not developed and unconstrained for future planned residential development.