

# **Coburg Urbanization Study**

Prepared for

City of Coburg

by

**ECONorthwest**

99 W. Tenth, Suite 400  
Eugene, OR 97401  
(541) 687-0051

**Final Report**

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# Executive Summary

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## WHY IS THE CITY UPDATING ITS COMPREHENSIVE PLAN?

The City is in a state-mandated process called Period Review. Thus the update is intended, in part, to meet state planning requirements. This is not the only rationale: the City expects to experience growth and its current plan is inadequate to ensure development is consistent with the *Coburg Crossroads Vision*.

## WHAT ARE THE KEY ISSUES THAT NEED TO BE ADDRESSED?

The City will address many issues during the Periodic Review process. These include virtually everything the City does to manage growth: land use policies and standards, transportation, water, sewer, parks, housing, economic development, and natural resources are all issues to be addressed in the plan update.

## WHAT IS THE PURPOSE OF THE URBANIZATION STUDY?

The purpose of the Urbanization Study was to (1) evaluate growth forecasts, (2) inventory how much buildable land the City has, (3) identify housing needs, (4) identify economic development strategies, and (5) determine how much land the City will need to accommodate growth between 2002 – 2025 and 2002 – 2050.

## HOW MUCH GROWTH IS COBURG PLANNING FOR?

Table S-1 summarizes population and employment forecasts for Coburg.

**Table S-1. Population and employment forecasts, Coburg 2002-2025 and 2002-2050**

<b>Year</b>	<b>Population</b>	<b>Employment</b>	<b>Pop/Emp</b>
2000	969	3,717	0.26
2002	990	2,988	0.33
2025	3,327	5,157	0.65
2050	6,701	5,257	1.16
Change 2002-2025			
Number	2,337	2,169	1.08
Percent	236.1%	72.6%	
AAGR	5.4%	2.4%	
Change 2025-2050			
Number	3,374	100	33.74
Percent	101.4%	1.9%	
AAGR	2.8%	0.1%	

## HOW MUCH LAND DOES THE CITY CURRENTLY HAVE?

Coburg has about 531 acres within the current Urban Growth Boundary (UGB). Of this, about 464 acres are in tax lots; the remaining lands are in public right-of-ways—primarily streets. The City has about 108 acres of buildable commercial, industrial, and residential land within its UGB. Table S-2 summarizes the buildable land inventory and land needs.

## HOW MUCH HOUSING WILL THE CITY NEED?

Coburg will need to provide about 900 dwelling units to accommodate growth between 2002 and 2025 and about 2,200 dwelling units to accommodate growth between 2002 and 2050. Key housing needs are for lower income households, young families, senior citizens, and local workers. These housing needs will require a variety of housing types and densities.

## HOW MUCH LAND WILL THAT GROWTH REQUIRE?

ECONorthwest estimates Coburg will need 327.5 total acres to accommodate growth between 2002 and 2025 and an additional 340.4 acres to accommodate growth between 2025 and 2050 for a total land need of 667.9 acres between 2002 and 2050. About 50% of the land will be needed for residential uses: 20-25% for employment and 20-25% for public uses such as parks.

## DOES THE CITY HAVE ENOUGH LAND IN THE EXISTING UGB TO ACCOMMODATE GROWTH?

No. Table S-2 shows a comparison of estimated land need and land demand for the Coburg UGB between 2002 and 2025 and 2025-2050. The results lead to the following findings:

- The City does not have a surplus of land in any category.
- The City has made a policy decision to expand the UGB by 57.6 acres for employment for the 2002-2025 period.
- The City will need 327.5 acres of land to accommodate development for the 2002-2025 period. The majority of this land will be for residences, with smaller amounts needed for parks and public/semi-public uses. Because the City only has about 108 buildable acres in the UGB, accommodating this growth will require a UGB expansion of 219.4 gross buildable acres.
- The City will need to identify 340.4 acres that can be put into urban reserve areas to accommodate growth for the 2025-2050 period. Between 60 - 100 acres are needed for uses that *could* be located east of I-5.

**Table S-2. Comparison of land need and land supply (gross acres), Coburg UGB, 2002-2025 and 2025-2050**

Plan Designation	Land Need		Gross Buildable Acres	(Deficit) Surplus	
	2002-2025	2025-2050		2002-2025	2025-2050
Central Business District	5.2	1.0	5.2	0.0	(1.0)
Highway Commercial	25.2	1.3	25.2	0.0	(1.3)
Light Industrial	76.2	3.3	18.6	(57.6)	(3.3)
Park and Recreation	30.2	33.7	0	(30.2)	(33.7)
Public / Semi Public	22.8	60.9	0	(22.8)	(60.9)
Residential	167.9	240.2	59.1	(108.8)	(240.2)
<b>Total</b>	<b>327.5</b>	<b>340.4</b>	<b>108.1</b>	<b>(219.4)</b>	<b>(340.4)</b>

### WHAT STEPS DOES ECONORTHWEST RECOMMEND THE CITY TAKE?

**Finding: The community has expressed concern about infill and redevelopment in existing developed areas within the City Limits.**

1. Evaluate options for preserving community character including design standards, density standards, or limits on allowable uses.
2. Adopt infill standards that apply consistently to *all* developed residential areas within the City Limit.

**Finding: The Coburg Comprehensive Plan is inadequate to meet identified housing needs.**

1. Amend the comprehensive plan to include high-, medium-, and low-density residential designations.
2. Coburg should consider a range of tools to meet the housing needs of present and future residents including multiple residential zones, a mixed-use zone, providing sufficient residential land by zone, reduce minimum lot size, and allowing accessory dwellings.

**Finding: Lands designated for Highway Commercial uses present both opportunity and risk.**

1. Amend the C-2 zone to place a maximum building size or footprint of 50,000 sq. ft. to reduce the chance of big box retail.
2. Amend the C-2 zone to remove residential uses from the list of outright allowable uses.
3. Add design standard for commercial uses in this zone.
4. Consider placing a master plan requirement on the 25-acre site adjacent to the interchange, or redesignate the site for business park uses.

**Finding: The City does not have enough land to accommodate growth between 2002 and 2025.**

1. Add approximately 219 acres of buildable land to the UGB to accommodate growth between 2002 and 2025.
2. Expand the UGB for employment by about 58 acres in the 2002-2025 study period.
3. Expand the UGB by approximately 109 acres to accommodate housing needs in the 2002-2025 study period.
4. Expand the UGB by about 53 acres to accommodate parks and other public uses.

**Finding: ORS 197.298 requires the City to evaluate the feasibility of expanding onto exceptions areas first.**

1. Carefully evaluate each exception area's merit for inclusion in the UGB consistent with the seven Goal 14 factors.

**Finding: There is not enough development capacity in exceptions areas to accommodate housing, park, public, and semi-public land needs.**

1. Identify approximately 219 acres of buildable land to expand the UGB to accommodate growth between 2002 and 2025.
2. Develop better cost estimates of servicing the various UGB expansion study areas as part of the public facilities and services plan update.

**Finding: Urban form is a consideration in deciding where to expand the UGB.**

1. UGB expansion study areas 5 and 6 provide the best opportunity for developing an efficient urban form.

**Finding: The City does not have enough land of any type to accommodate growth in the 2025-2050 period.**

1. The City should develop a system of Urban Reserve Areas.
2. Consider URAs that foster existing development patterns.

## BACKGROUND

The City of Coburg is presently in Periodic Review of its Comprehensive Land Use Plan. The City's work program, as approved by the Department of Land Conservation and Development (DLCD), includes an update of the buildable lands inventory (BLI), a housing needs assessment, and an evaluation of land supply within the Urban Growth Boundary (UGB) consistent with the requirements of statewide planning goals 9, 10, and 14.

The City is presently in the planning phase of developing a sanitary sewer system. The development of a sewer system is a foundational issue addressed in this study. The population and employment forecasts used to analyze land needs assume that a sewer system will be built.

Oregon statewide planning Goals 9, 10, and 14 require communities to inventory buildable lands and to maintain a 20-year supply of land for residential, commercial, and industrial purposes. In 1996, the Oregon legislature passed House Bill 2709—now codified as ORS 197.296. While this legislation applies only to jurisdictions with populations of 25,000 or more, the principles defined in ORS 197.296 provide a sound foundation for assessing housing needs. It amended the Oregon Land Use Planning Act and further refined Goal 10 as follows:

- Refined the definition of buildable lands;
- Requires coordination of population projections by counties (ORS 195.036);
- Sets criteria for prioritizing land for UGB expansions (ORS 197.298);
- Sets specific requirements in ORS 197.296 for conducting residential buildable land inventories and housing needs assessments; and
- Requires demonstration of a 20-year buildable land supply.

Beyond the rationale for conducting a housing needs analysis established by Goal 10 and ORS 197.296, the *Coburg Crossroads Vision, 2003* (adopted by City Council Resolution #2003-6, May 20, 2003) desires to establish sustainability for Coburg by balancing housing, economy, schools, and other community elements. This report builds from the *Coburg Crossroads Vision* and strives to incorporate elements of the Vision wherever possible.

In addition to the buildable land inventory and Goal 10 housing analysis, Coburg desired an evaluation of the adequacy of buildable land within its UGB for the next 20 years (a Goal 14 evaluation), and the next 50 years (consistent with the Region 2050 project).

## PURPOSE AND METHODS

The state requirement that certain cities conduct periodic review of their comprehensive plan is intended to keep local land use plans current with local needs and with changing state land use policies. The purpose of this technical report is to provide data to update the Goal 9, 10, and 14 factual components of the Coburg Comprehensive Plan including the buildable lands inventory.

Periodic review requires the City to address any new planning requirements adopted by the State since the City's last review of its comprehensive plan. Specifically, this report presents:

- A housing needs analysis consistent with Goal 10 and ORS 197.296;<sup>1</sup>
- An economic opportunities analysis consistent with Goal 9 and OAR 660-009;
- A buildable lands inventory consistent with Goal 9 and 10 requirements.

This report also compares demand for land with the supply of land. This analysis is required by statewide Planning Goals 9, 10, and 14 to determine if the City has sufficient buildable land to meet the 20-year demand.

In general, a Land Need Assessment contains 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 geographic scope of the Land Need Assessment is all land inside the Coburg Urban Growth Boundary.

## BUILDABLE LANDS

The general structure of the buildable land (supply) analysis is based on the DLCDC HB 2709 workbook "*Planning for Residential Growth – A Workbook for Oregon's Urban Areas*," which specifically addresses residential lands. The steps and sub-steps in the supply inventory are:

- Calculate the gross vacant acres by plan designation, including fully vacant and partially vacant parcels.
- Calculate gross buildable vacant acres by plan designation by subtracting unbuildable acres from total acres.
- Calculate net buildable acres by plan designation, subtracting land for future public facilities from gross buildable vacant acres.

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<sup>1</sup> Coburg is not required by law to conduct a housing needs analysis consistent with ORS 197.296 because it does not meet the either population or growth rate threshold. This study, however, includes an evaluation of housing needs consistent with the preferred population growth forecast presented in the *Coburg Crossroads Vision 2003*.

- Calculate total net buildable acres by plan designation by adding redevelopable acres to net buildable acres.

The supply analysis builds from a parcel-level database to estimates of buildable land by plan designation and zoning.<sup>2</sup> For other generalized land use types, each parcel was classified into one of the following categories:

- Vacant land
- Partially Vacant land
- Undevelopable land
- Developed land
- Potentially Redevelopable land

The City identifies areas in steep slopes, floodplains, wetlands identified in the National Wetlands Inventory (NWI), and land identified for future public facilities as constrained or committed lands. These areas were deducted from lands that were identified as vacant or partially vacant. Definitions of these characteristics and the results of the buildable residential lands inventory are presented in Chapter 3.

## HOUSING

*Demand* for land is characterized through analysis of national, regional, and local demographic and economic data. For residential uses, population and households drive demand. For the residential sector, for example, information about the characteristics of households is used to identify types of housing that will be sought by households.

The method used in this analysis is generally consistent with the method described in the DLCDD document *Planning for Residential Needs*. The Workbook describes six steps in conducting a residential needs assessment:

1. Project the number of new housing units needed in the next 20 years.
2. Identify relevant national, state, and local demographic trends that will affect the 20-year projection of structure type mix.
3. Describe the demographic characteristics of the population, and household 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.
5. Estimate the number of additional needed units by structure type.

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<sup>2</sup> The parcel-level database was based on information from the LCOG through the Lane County Assessor. The base data was supplemented with additional land use data and field work provided by City staff.

6. Determine the needed density ranges for each plan designation and the average needed net density for all structure types.

Chapter 4 presents the housing needs analysis which provides estimates of needed housing by type, density, and price. It also provides estimates of land that will be required to accommodate future population growth.

## ECONOMY

Oregon Planning Goal 9 and its Administrative Rule requires jurisdictions to provide an adequate supply of buildable lands for a variety of commercial and industrial activities. In addition, Goal 9 requires plans to be based on an analysis of the comparative advantages of a planning region. Comparative advantage is defined in terms of the relative availability of factors that affect the costs of doing business in the planning region; Goal 9 specifies many geographic, economic, and institutional factors that an analysis of comparative advantage should consider.

The analysis of comparative advantage in this report includes the locational factors specified by Goal 9. It assesses qualitatively the availability of these factors in Coburg relative to Lane County, and to Oregon.

## ORGANIZATION OF THIS REPORT

The remainder of this report is organized as follows:

- **Chapter 2, Context for Growth in Coburg: Population and Employment Forecasts**, presents 2025 and 2050 population and employment forecasts for the Coburg urban growth boundary as presented in the *Coburg Crossroads Vision* and provides an evaluation of the forecasts.
- **Chapter 3, Buildable Land Supply**, describes the supply of residential, commercial, industrial, and public land available to meet forecast population and employment growth.
- **Chapter 4, Housing Needs Analysis**, presents a housing needs analysis consistent with Goal 10.
- **Chapter 5, Economic Opportunities Analysis**, describes national and state economic factors that may affect Coburg, an overview of Coburg's economy, and an evaluation of the comparative economic advantages of Coburg.
- **Chapter 6, Comparison of Supply and Need**, compares buildable land supply with estimated housing need.
- **Chapter 7, Evaluation of Potential Urban Growth Boundary Expansion Areas**, provides an overview of the characteristics of potential UGB expansion areas.
- **Chapter 8, Policy Recommendations** presents a set of recommendations for policies the City can adopt to achieve the

development patterns described in the *Coburg Crossroads Vision 2003*.

The report also includes an appendix:

- **Appendix A, UGB Study Area Summary** presents data on eight study areas outside the Coburg UGB that are under consideration for a UGB expansion.



# Evaluation of Population and Employment Forecasts

## Chapter 2

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A forecast of expected population growth in Coburg is essential to estimate the demand for buildable land and to assess housing needs. Expected population growth will also influence economic opportunities and employment growth in Coburg, which will have implications for demand for non-residential land and public services. The City of Coburg is currently in the process of developing a long-run population and employment forecasts for the Coburg UGB.<sup>3</sup> The City has developed a baseline population forecast and three alternative forecasts for population growth in addition to the base case. Each of these population forecasts is based on a set of assumptions regarding the average annual growth rate and public policies to encourage growth and housing for seniors, workers, and young families.

The City has also identified three ranges of potential employment growth that correspond with population growth alternatives. These employment ranges assume that employment land will be built out by 2025, and that increased population growth will lead to increased employment growth, particularly in downtown commercial businesses. The City notes that the employment forecasts may require expansion of Coburg's Urban Growth Boundary (UGB) for commercial and industrial uses.

Selection of a final population forecast for Coburg is pending the release of a final long-term forecast for Lane County by the State of Oregon, and allocation of that forecast to communities in Lane County by the Lane Council of Governments (LCOG). The State last issued a long-term forecast for Lane County in 1997 and is currently developing an updated long-term forecast for Oregon and its counties.<sup>4</sup> Once this updated long-term forecast for Lane County is released, the State requires counties to adopt the State forecast for planning purposes (or present compelling reasons to diverge from the State forecast) and to coordinate forecasts for incorporated and unincorporated areas in the county so that the forecasts for these areas sum to the county total (as required by ORS 195.036). The process of allocating the Lane County forecast to incorporated jurisdictions and unincorporated Lane County is being managed by the LCOG, which has already developed preliminary coordinated forecasts for Coburg and other areas in Lane County.

The State long-term forecast for Oregon and counties will extend to 2040. LCOG is developing a forecast for Lane County and jurisdictions to 2050 as

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<sup>3</sup> City of Coburg, *Population and Employment Growth Alternatives and Preferences*, 2003.

<sup>4</sup> State of Oregon, Office of Economic Analysis, *Long-Term Population Forecast for Oregon and its Counties, 2000–2040 (Draft)*, January 2003. The state Office of Economic Analysis did not have a timeline for finalizing the draft forecasts at the time this report was completed.

part of the Region 2050 project, which is assessing alternatives for accommodating long-run growth in the southern Willamette Valley.

State law does not require employment forecasts to be coordinated with the State forecast for total employment by county. Any employment forecast adopted by Coburg, however, will be somewhat tied to the coordinated population forecast by the need to maintain a balance between jobs and housing to reduce commuting and automobile use. The population and employment forecasts evaluated in this chapter are a result of the community visioning process and the preferred growth scenario selection presented in the *Coburg Crossroads Vision, 2003* which was adopted by a resolution of the Coburg City Council in 2003. Coburg does not have a statutory obligation to grow; it desires to grow for the following reasons:

- To improve the jobs/housing balance
- To provide housing opportunities for families, seniors, and individuals that work in Coburg
- To offset the cost of developing the City's sewer system
- To support the continued operation of the elementary school

The next section presents ECO's evaluation of population and employment forecasts.

## **STRUCTURE OF THIS EVALUATION**

The Population Forecast section presents the City's growth alternatives and LCOG's preliminary coordinated forecast for Coburg. This section also presents the population forecasts for Eugene-Springfield, Lane County, and Oregon to provide a context for growth in Coburg. This section identifies the methods and assumptions used to develop these forecasts.

The Employment Forecast section presents Coburg's employment growth alternatives and identifies the methods and assumptions used to develop these alternatives.

The Evaluation section begins with a discussion of the variability of forecasts for small areas such as Coburg. ECO then evaluated the potential for actual population and employment growth in Coburg to vary from the forecast. This section concludes with recommended population and employment forecasts that will be used in the remainder of the Coburg Urbanization Study.

## **POPULATION FORECAST**

The City of Coburg has developed a Base Case forecast of population growth and three alternatives (A, B, and C) for growth in addition to the Base

Case forecast. The Base Case forecast and Alternatives A–C share the following assumptions:

- Coburg will grow at its historical rate until the sewer comes on line in 2006.
- Sewer capacity expands to accommodate growth.
- After sewer comes on line, minimum lot sizes will decrease and zoning will allow for a mix of housing types.
- There is latent demand for development, which is lessened by the increased cost of development.

The Base Case forecast and Alternatives A-C are based on different assumptions about the population growth rate, housing densities, and public policy to encourage population growth to support schools and commercial development in Coburg. The assumptions that lead to different population forecasts in the Base Case and Alternatives A–C are shown in Table 2-1.

**Table 2-1. Assumptions for Coburg population growth alternatives**

Population Forecast			
Base Case	Alternative A	Alternative B	Alternative C
Coburg grows at a rate similar to the historical rate in Creswell, Lane County's fastest growing city.	Coburg grows at a rate similar to the historical rate in Creswell, with additional population of seniors, workers, and young families between 2006 and 2015.	Coburg grows at an average annual rate of 8.6% until population reaches 6,000. Growth then slows to a rate similar to the County's historical rate.	Coburg grows at an average annual rate of 11.8% until population reaches 10,000 in 2025. Growth then slows to 1.3% per year, the County's historical rate.
	Housing densities increase more than Base Case due to targeted housing for seniors, young families, and workers; and regional demand is shifted to Coburg.		
	A combined total of 1,000 seniors and workers will be housed in Coburg, and 50 young families will choose to live in Coburg and send their children to Coburg schools.		
		A population base of 6,000 would be sufficient to support provision of basic goods and services, such as a supermarket and pharmacy.	
			Other jurisdictions in the region will agree to accommodate less of their projected population growth in their UGBs.

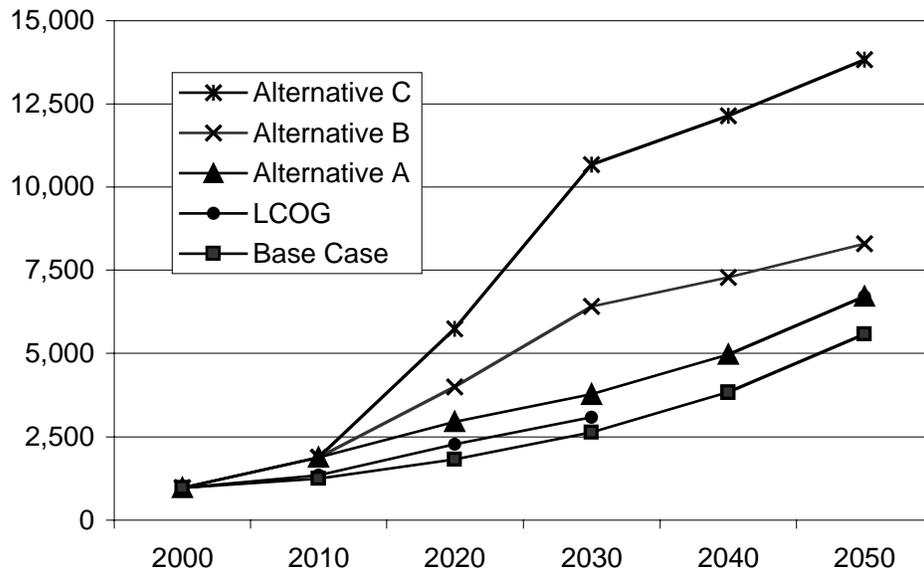
Source: City of Coburg, *Population and Employment Growth Alternatives and Preferences*, 2003.

The varying assumptions used by the City of Coburg to develop population growth alternatives lead to different forecasts of employment growth. Figure 2-1 shows the City's Base Case forecast and Alternatives A–C, as well as LCOG's preliminary coordinated forecast for Coburg. Figure 2-1 shows that LCOG's coordinated forecast is between the City's Base Case and Alternative A forecasts in 2000–2030, but converges with the Alternative A forecast by 2050 (LCOG did not forecast a population for Coburg in 2040).

The City's Alternatives A-C forecast population growth in addition to the Base Case forecast for 2050. Compared to the Base Case, Alternative A adds

2,867 residents, Alternative B adds 4,463 residents, and Alternative C adds 9,995 residents in 2050.

**Figure 2-1. Population growth alternatives for Coburg, 2000–2050**



Forecast	Year					
	2000	2010	2020	2030	2040	2050
Alternative C	969	1,888	5,737	10,670	12,147	13,829
Alternative B	969	1,888	3,984	6,402	7,288	8,297
Alternative A	969	1,888	2,955	3,776	4,969	6,701
LCOG	969	1,354	2,276	3,102		6,700
Base Case	969	1,253	1,820	2,641	3,834	5,566

Source: City of Coburg, Population and Employment Growth Alternatives and Preferences, 2003. LCOG forecast from Lane Council of Governments, Preliminary Coordinated UGB Population for Cities in Lane County, 2003.

A stakeholder group engaged in the City of Coburg’s *Crossroads Vision* process selected Growth Alternative A as the preferred forecast for Coburg. Table 2-2 shows historical and forecast population for Coburg, Eugene-Springfield, Lane County, and Oregon over the 1990–2050 period, using Alternative A for the Coburg forecast. The City of Coburg has stressed that this forecast is not set in stone—it is subject to change based on further review, analysis, and public process. Moreover, the forecasts have yet to be fully coordinated as required by ORS 195.036.<sup>5</sup> The Oregon and Lane County forecasts in Table 2-2 are from the State’s current draft long-term forecast,

<sup>5</sup> A March 23, 2004 letter from the Lane Council of Governments (the coordinating body for Lane County and its incorporated cities) to the City of Coburg indicates that the *preliminary* coordinated 2025 population for Coburg is 2,950 persons. This is slightly lower than the 3,327 figure used in growth Alternative A (which is used in this report). In the same letter LCOG indicates that in the preferred Region 2050 population scenario, the City of Coburg has a 2025 population of between 2,400 to 3,400. Thus, the 3,327 population forecast used in this report falls within the range of the Region 2050 preferred population scenario.

and the Eugene-Springfield forecast is from LCOG's current allocation of the State forecast to cities in Lane County.

Table 2-2 shows that Coburg's population grew by 206 between 1990 and 2000, but the City's Alternative A forecasts population growth of 919 between 2005 and 2015 and additional growth of 1,067 between 2015 and 2025.

Population growth in Coburg is currently constrained by the lack of sanitary sewer service. The City plans on having a sanitary sewer system installed by 2006, and they expect the availability of sanitary sewer service to have a dramatic effect on the population growth rate. The City's Base Case population forecast assumes that Coburg will grow at a rate similar to historical growth in Creswell, the fastest-growing city in Lane County, after sewer service is available in 2006. The City's Population Growth Alternative A assumes that City policies to target housing for seniors, workers, and young families will generate growth in addition to the Base Case forecast. After a period of rapid growth, Coburg's annual average growth rate is expected to be closer to Coburg's historical growth rate in the 1990s. Table 2-2 shows the forecast annual average growth rate for Coburg in the 2005–2015 period is 9.8%, which falls back to historical rates of 2.3–2.8% in the 2015–2025 and 2025–2050 periods.

**Table 2-2. Historical and forecast population in Coburg, Eugene-Springfield, Lane County, and Oregon, 1990–2050**

	Year	Coburg	Eugene-Springfield	Lane Co.	Oregon
<b>Historical Population</b>	1990	763	190,180	282,912	2,860,375
	2000	969	222,503	322,959	3,436,750
	2005	1,040	233,911	337,420	3,629,036
	2010	1,888	248,030	354,876	3,845,278
	2015	2,645	262,149	375,232	4,098,697
	2020	2,955	276,213	395,030	4,356,255
<b>Forecast Population</b>	2025	3,327	290,723	413,230	4,608,105
	2030	3,776	305,247	430,245	4,852,416
	2035	4,317		446,443	5,089,665
	2040	4,969		462,485	5,323,853
	2045	5,755		479,000	
	2050	6,701	377,792	495,500	n/a
<b>Population Growth</b>	90-00	206	32,323	40,047	576,375
	05-15	919	25,527	31,917	408,528
	15-25	1,067	28,183	40,154	510,977
<b>Avg. Annual Growth Rate</b>	90-00	2.4%	1.6%	1.3%	1.9%
	05-15	9.8%	1.1%	1.1%	1.2%
	15-25	2.3%	1.0%	1.0%	1.2%
	25-50	2.8%	1.1%	0.7%	n/a
<b>% of Lane County</b>	1990	0.3%	67.2%	100.0%	n/a
	2000	0.3%	68.9%	100.0%	n/a
	2005	0.3%	69.3%	100.0%	n/a
	2015	0.7%	69.9%	100.0%	n/a
	2025	0.8%	70.4%	100.0%	n/a
	2050	1.4%	76.2%	100.0%	n/a

Sources: Coburg population from the City of Coburg, *Population and Employment Growth Alternatives and Preferences*, 2003. Eugene-Springfield and population from Lane Council of Governments, *Preliminary Coordinated UGB Population for Cities in Lane County*. Lane County and Oregon population from State of Oregon, Office of Economic Analysis, *Long-Term Population Forecast for Oregon and its Counties, 2000–2040 (Draft)*, January 2003. Population growth, average annual growth rate, and percent of Lane County population calculated by ECONorthwest. Note: population for Coburg and Eugene-Springfield is for the area within their Urban Growth Boundaries.

## EMPLOYMENT FORECAST

In the *Coburg Crossroads Vision*, the City of Coburg identified three potential ranges of employment growth over the 2000–2050 period. Each of these three employment growth ranges share the following assumptions:

- Existing vacant land will be built out by 2025.
- On average, downtown commercial land will develop at 20 employees per acre, highway commercial land at 10 employees per acre, and industrial land at 15 employees per acre. (*Coburg Crossroads Vision*, 2003, pg 31)

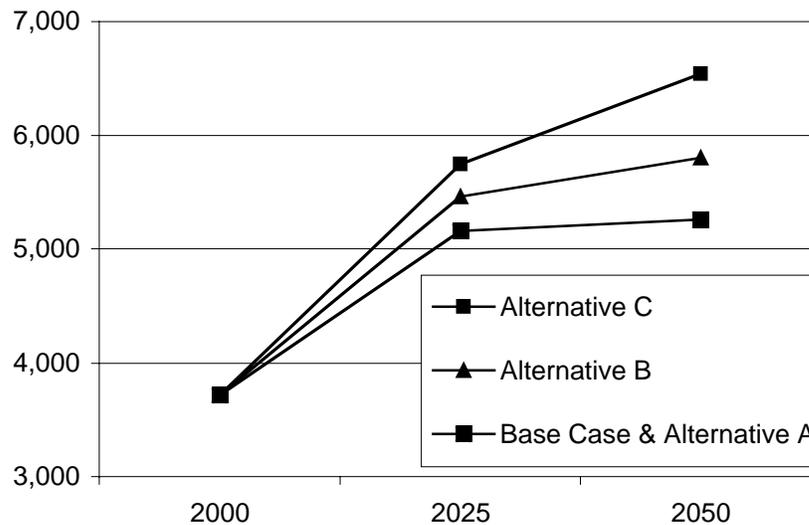
In addition to the two assumptions above, the Coburg City Council directed ECONorthwest to identify an employment growth forecast that

would justify the need for an additional 50 acres of land for employment for the 2002-2025 period. This need is consistent with the City's draft economic development strategy described in Chapter 5. The three employment growth ranges are identified by their corresponding population growth alternatives. Each of these growth ranges results from the varying levels of population growth associated with each population growth alternative, and different assumptions about downtown commercial development:

- **Base Case and Alternative A:** Employment will increase to 5,157 by 2025. Limited infill and redevelopment will add 100 jobs between 2025 and 2050.
- **Alternative B:** Downtown commercial businesses will continue growing after 2025 due to the 6,000 population forecast in Alternative B. Most of this growth will be accommodated through infill and redevelopment.
- **Alternative C:** Downtown commercial businesses will continue growing after 2025 at a higher rate than in Alternative B, due to the 10,000 population forecast in Alternative C. Most of this growth will be accommodated through infill and redevelopment, but expansion of the Urban Growth Boundary may be necessary to accommodate employment.

Figure 2-2 shows the three employment growth ranges developed by the City of Coburg. This figure shows that employment growth associated with the population Base Case and Alternative A forecasts would add 1,440 jobs between 2000 and 2025, and just another 100 jobs between 2025 and 2050. Employment growth associated with population Alternative B forecast would add 1,744 jobs by 2025 and another 338 jobs between 2025 and 2050. Employment growth associated with population Alternative C forecast would add 2,026 jobs by 2025 and another 800 jobs between 2025 and 2050.

**Figure 2-2. Employment growth ranges for Coburg, 2000–2050**



Forecast	Year		
	2000	2025	2050
Alternative C	3,717	5,743	6,543
Alternative B	3,717	5,461	5,799
Base Case & Alternative A	3,717	5,157	5,257

Source: City of Coburg, *Population and Employment Growth Alternatives and Preferences*, 2003.

The State of Oregon has not developed an updated forecast of total employment that corresponds with their draft forecasts of population, so we cannot present the State forecast for comparison to Coburg. Table 2-3 compares the annual average growth rate and resulting level of jobs per resident resulting from the City’s forecast of population and employment. Table 2-3 shows that the City of Coburg forecast population to grow at a faster rate than employment in every growth scenario. As a result, the ratio of jobs per resident in Coburg is expected to decline in each growth scenario. The City estimated that Coburg had 3.8 jobs per resident in 2000; this is expected to fall to 0.6–1.6 jobs per resident by 2015, and 0.5–0.9 jobs per resident by 2025. As a point of reference, Oregon had approximately 0.5 jobs per resident in 2000.<sup>6</sup>

<sup>6</sup> U.S. Census, *Oregon Demographic Profile*, 2000. Jobs per resident calculated by ECONorthwest.

**Table 2-3. Average annual growth rate and jobs per resident by growth scenario in Coburg, 2000–2050**

Forecast Scenario	Forecast Period	
	2000-2025	2025-2050
<b>Base Case</b>		
Population	4.9%	2.2%
Employment	1.3%	0.1%
Jobs/Pop	1.6	0.9
<b>Alternative A</b>		
Population	5.1%	2.8%
Employment	1.3%	0.1%
Jobs/Pop	1.6	0.8
<b>Alternative B</b>		
Population	7.6%	1.3%
Employment	1.6%	0.2%
Jobs/Pop	0.9	0.7
<b>Alternative C</b>		
Population	9.8%	1.3%
Employment	1.8%	0.5%
Jobs/Pop	0.6	0.5

Source: City of Coburg, *Population and Employment Growth Alternatives and Preferences*, 2003. Average annual growth rate and jobs/population ratio calculated by ECONorthwest.  
 Note: Jobs/population ratios are for the years 2025 and 2050.

Since the City and LCOG developed the population and employment growth alternatives, ECONorthwest updated the inventory of buildable land, and included in these estimates underdeveloped land that may redevelop into more intensive uses, and expansion areas owned by existing firms in Coburg. Because Coburg’s employment forecast is based on the amount of buildable land and assumptions about employment density, any change in these factors will affect the employment forecast. Table 2-4 shows revised estimates of the amount of buildable land in Coburg and the capacity of that land to accommodate employment growth.

**Table 2-4. Employment growth capacity of vacant land, underdeveloped sites, and expansion areas in Coburg, 2003**

Land Type	Acres	Emp/Acre	Employment Capacity	
Downtown Commercial	6	20	120	6%
Highway Commercial	25	10	250	13%
Light Industrial	20	15	300	16%
Underdeveloped	50	15	750	39%
Expansion Areas		n/a	500	26%
<b>Total</b>			<b>1,920</b>	<b>100%</b>

Source: ECONorthwest.

Notes: Underdeveloped sites are sites with an improvement to land value ratio of less than 1:1 (in other words the value of the improvements is less than the value of the land)

Expansion areas are areas owned by existing firms that could accommodate additional employment by those firms.

Employment capacity on “Underdeveloped” is an estimate of capacity *if* all underdeveloped land were to redevelop at higher densities. The assumptions concerning redevelopment are described in Chapter 6.

Table 2-4 shows that buildable non-residential land in Coburg, including underdeveloped sites and expansion areas for existing firms, have a capacity to accommodate another 1,920 employees. The level of employment growth in Table 2-4 is within the range of growth forecast by the City's employment growth alternatives for the 2000–2025 period, which is 1,440 to 2,026 (see Figure 2-1). The estimates in Table 2-4 suggest that the level of employment growth in the City's alternatives is still reasonable given current land supply conditions in Coburg.

## EVALUATION OF FORECASTS

Population and employment forecasts for small areas or for long periods of time are subject to a high degree of uncertainty. Long-term forecasts for small areas compound this uncertainty. Several factors contribute to the uncertainty of long-term and small-area forecasts:

- Population and employment forecasts for most communities are simple projections of past growth rates into the future. Such a forecast implicitly assumes that the underlying factors driving growth will remain relatively constant. The longer the forecast period, however, the greater the chances that some underlying factors will change in ways that could affect growth. Examples of underlying conditions that could affect population growth in Coburg include public policy, economic conditions, birth and death rates, transportation costs, and consumer preferences for housing.
- Even if planners had a sophisticated model that explicitly included all of the important underlying factors together (which they do not), they would still face the problem of having to forecast the future of these factors. In the final analysis, all forecasting requires making *assumptions* about the future.
- Comparisons of past population and employment projections to subsequent population counts have revealed that even much more sophisticated methods than the ones used in Coburg "are often inaccurate even for relatively large populations and for short periods of time."<sup>7</sup> The smaller the area and the longer the period of time covered, the worse the results for any statistical method.
- Small areas start from a small base. Single unforeseen events in a small community, such as development of a new subdivision, can cause population to significantly diverge from forecast levels. A new subdivision of 100 homes inside the Portland Urban Growth Boundary has a relatively small effect on total population. That same subdivision in Coburg would increase the community's housing stock and population by more than 25%.

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<sup>7</sup>Murdock, Steve H., *et. al.* 1991. "Evaluating Small-Area Population Projections." *Journal of the American Planning Association*, Vol. 57, No. 4, page 432.

- Especially for small cities in areas that can have high growth potential (e.g., because they are near to concentrations of demand in neighboring metropolitan areas, or because they have high amenity value for recreation or retirement), there is ample evidence of very high growth rates in short-term; there are also cases (fewer) of high growth rates sustained over 10 to 30 years.

In this context, there is a wide range of possible population and employment growth levels in Coburg that could be justified by reasonable assumptions about future conditions. Several factors related to Coburg's situation could have a substantial effect on forecast or actual population and employment growth:

- Coburg's proximity to the Eugene-Springfield metropolitan area could generate higher levels of population growth. Table 2-2 shows that Eugene-Springfield is expected to grow by 25,527 between 2005 and 2015 while Coburg is expected to grow by 919 in the same period. If just 1% of growth in Eugene-Springfield went to Coburg instead, growth in Coburg would increase by 255 or 28%. Such a shift in population growth could be driven by economic factors such as housing prices or consumer preferences, or by public policies that encourage growth in Coburg.
- In a similar fashion, attracting a small percentage of employment growth from Eugene-Springfield could significantly increase the level of employment in Coburg.
- Public policies in Coburg to encourage or discourage growth, or that affect the price of land, could result in more or less population growth. All of the City's population growth scenarios assume that sewer capacity will expand to accommodate growth. The City's preferred population forecast includes the assumption that the City will adopt policies to target housing for seniors, workers, and young families, generating population growth in addition to the Base Case forecast. In the future, however, Coburg officials may adopt policies that could result in more or less population growth than forecasted.

Overall, Coburg's preferred population forecast is based on sound methods and reasonable assumptions. Given Coburg's proximity to Eugene-Springfield, substantially higher levels of population growth could be justified with different, but still reasonable, assumptions. And this proximity suggests that lower levels of population growth than forecast are unlikely. ECO uses this population forecast (Alternative A), without modification, as the basis for the housing needs analysis in Chapter 4.

The employment forecast for Coburg is subject to a higher level of variability than the population forecast because employment is more closely tied with changing short-run economic conditions. In addition, the employment forecast is based on an estimate of land supply and assumptions about the number of employees per acre for various land use types. Actual

employment densities, however, will be determined by the types of firms that locate in Coburg. The level of redevelopment in Coburg will vary depending on economic conditions. Differences in the density of employment and amount of redevelopment in Coburg will cause actual employment growth to diverge from the forecast.

The employment growth alternatives developed by Coburg assume that buildable non-residential land in Coburg will be fully developed by 2025. Given the relatively small amount of non-residential land in Coburg and Coburg's proximity to the growing Eugene-Springfield metropolitan area, this assumption appears reasonable. This issue will be addressed further in Chapter 5.

The analysis in this report will present information that will have implications for expected population and employment growth in Coburg. Estimates of the amount of buildable lands in Coburg presented in Chapter 3 could affect the land base used to estimate the capacity for population and employment growth. Estimates of housing need in Chapter 4 could affect the assumptions of housing density used to forecast population capacity in Coburg. Economic opportunities and constraints for development in Coburg presented in Chapter 5 could have implications for potential employment growth. The implications of information presented in Chapters 3, 4, and 5 will be summarized in population and employment forecasts presented in Chapter 6, which will be used to estimate the amount of land needed in Coburg to accommodate expected population and employment growth.

Finally, public policy has a critical role in determining the level of population and employment growth in a community. Local population and employment growth can be influenced by local policies, especially those regarding land use, public facility provision and pricing (taxes and fees), and economic development (incentives). It is contrary to economic theory and common sense to assume, as state policy on population forecasts is often interpreted, that every jurisdiction has a singular growth path that can be specified independent of the policies it might adopt to curb, accommodate, or stimulate growth. The population and employment forecasts used to estimate land needs in Coburg will need to be explicit about the assumptions regarding public policy (i.e., land use, public facility provision and pricing, and economic development) as it pertains to growth in the community.

Moreover, many adjacent lands outside the existing Coburg UGB have Class 1-4 soils and are considered high value farmlands. Based on the *Coburg Crossroads Vision*, it is not the community's desire to grow more than it has determined (the preferred alternative growth forecasts relate directly to wastewater capacity). Little growth can be realized until the wastewater facility is constructed. Finally, Coburg recognizes the importance of the agricultural economy and desires to sustain the agricultural industry by not expanding the UGB any more than is required.

ECO uses this population forecast (Alternative A), without modification, as the basis for the housing needs analysis in Chapter 4. A revised

employment forecast based on input from the Coburg Core Team and Stakeholder Group is presented in Chapter 5 and used as the basis for estimating land needed to accommodate employment.



# Buildable Lands Inventory

## Chapter 3

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The buildable lands inventory is intended to identify lands that are available for development within the UGB. The inventory is sometimes characterized as *supply* of land to accommodate growth. Population and employment growth drive *demand* for land. The amount of land needed depends on the density of development.

This chapter presents the buildable lands inventory for the City of Coburg. The results are based on input from City staff, the Coburg Core Team, and the Coburg Stakeholder Group.

### DEFINITIONS AND ASSUMPTIONS

The first step in the inventory is to develop working definitions and assumptions. ECO then classified land using a rule-based methodology. The rules applied by ECO to classify land are described below. ECO followed up the database work with extensive field verification and discussions with City staff.

ECO began the buildable lands analysis with a tax lot database provided by the Lane Council of Governments. The database originated from the Lane County Assessor and was current as of August, 2003.<sup>8</sup> The supply analysis builds from a tax lot-level database to estimates of buildable land by plan designation.<sup>9</sup> Because some tax lots have areas both inside and outside the UGB, the first step in the analysis was to identify lands within the Coburg UGB. This step involved using the *clip* function in Arcview and then recalculating the area of each tax lot.

The next step in the buildable lands analysis was to classify each tax lot into a set of mutually exclusive categories. ECO developed a set of working definitions that specify the rules with input from City staff. Consistent with the *Residential Lands Workbook*, we classified all tax lots in the UGB into one of the following categories:

- *Vacant land.* Tax lots that have no structures or have buildings with very little value. For the purpose of this inventory, residential lands with improvement values under \$5,000 are considered vacant (not including lands that are identified as having mobile homes).

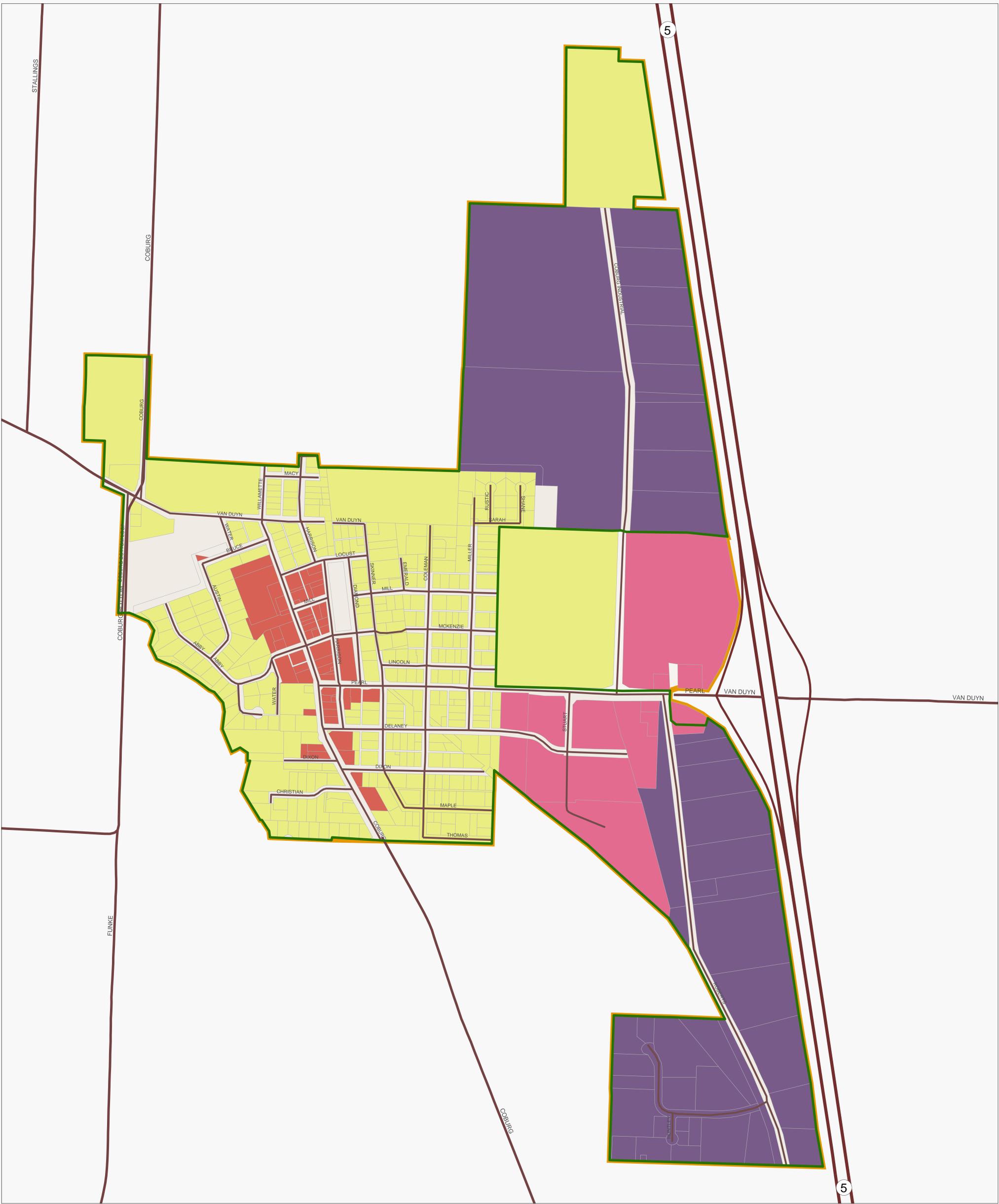
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<sup>8</sup> The parcel-level database was based on information from the Lane County Assessor through the Lane Council of Governments. The base data was supplemented with additional land use data and field work provided by ECONorthwest and City staff.

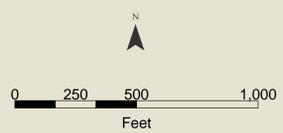
<sup>9</sup> Plan designation and zoning is the same for all lands within the Coburg City limit.

- *Partially vacant land.* Partially vacant tax lots are those occupied by a use but which contain enough land to be further subdivided without need of rezoning. Partially vacant residential tax lots must be at least 20,000 square feet in area. ECO used the 20,000 square foot threshold as a preliminary indicator for partially-vacant land, and then reviewed improvement values and aerial photos to verify lands classified as partially-vacant. Partially vacant commercial and industrial tax lots were identified by analysis of GIS data, aerial photographs, and fieldwork.
- *Undevelopable land.* Land that is under the minimum lot size for the underlying zoning district, land that has no access or potential access, or land that is already committed to other uses by policy. The minimum lot size in Coburg is 10,000 square feet in all areas. ECO used a lower threshold (2,500 square feet) to identify undevelopable land.
- *Developed land.* Land that is developed at densities consistent with zoning and improvements that make it unlikely to redevelop during the analysis period. Lands not classified as vacant, partially-vacant, or undevelopable are considered developed.
- *Underdeveloped land.* Land on which development has already occurred but on which, due to present or expected market forces, there exists the potential that existing development will be converted to more intensive uses during the planning period. Underdeveloped land includes lands designated for commercial and industrial uses with improvement to land value ratios of less than 1:1. Underdeveloped land is a subset of developed land.
- *Public land.* Lands in public or semi-public ownership are considered unavailable for residential development. This includes lands in Federal, State, County, or City ownership as well as lands owned by churches and other semi-public organizations. ECO identified such lands using property ownerships.

The land classifications result in identification of lands that are vacant or partially vacant. The inventory includes all lands within the Coburg UGB. Public and semi-public lands are generally considered unavailable for development. Figure 3-1 shows lands by plan designation within the Coburg UGB.



**Map 3-1. Plan Designations**  
**Buildable Land Inventory**  
**City of Coburg**  
**Oregon**



- Central Business District
- Highway Commercial
- Light Industrial
- Residential
- Tax Lots
- Urban Growth Boundary
- City Limit

UO InfoGraphics lab, Department of Geography  
 Cartography/GIS: Ken Kato, February 2004.

# RESULTS

## LAND BASE

Table 3-1 shows acres by plan designation within the Coburg UGB in 2003. According to the LCOG GIS data, Coburg had about 531 acres within its UGB. Of the 531 acres, 464 acres (about 87%) were in tax lots. Acres not in tax lots were exclusively in streets and other right-of-ways.

**Table 3-1. Acres by plan designation, Coburg UGB, September 2003**

Plan Designation	Number of Tax Lots	Total Acres	Acres in Tax Lots	Percent in Tax Lots
Central Business District	57	21.8	16.6	76%
Highway Commercial	13	65.2	59.8	92%
Light Industrial	54	207.9	193.5	93%
Park/Recreation	3	33.4	24.2	72%
Public Water Service	1	1.5	1.5	100%
Residential	390	201.6	168.1	83%
<b>Acres in UGB</b>	<b>518</b>	<b>531.4</b>	<b>463.8</b>	<b>87%</b>

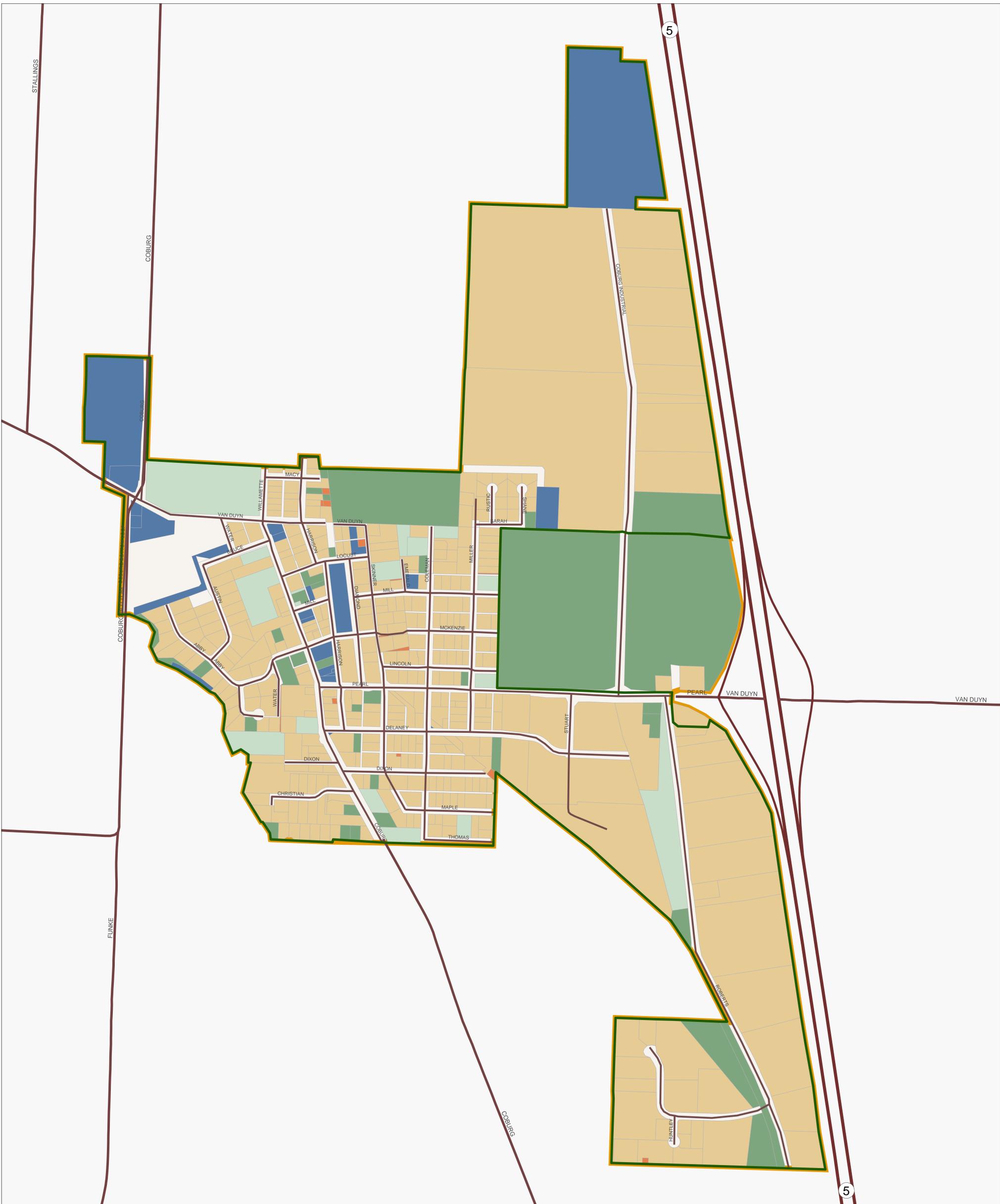
Source: LCOG GIS data; analysis by ECONorthwest

Table 3-2 shows acres by classification and plan designation for the Coburg UGB in 2003. The classifications show that about 302 acres (65% of total acres) were classified as developed, while about 87 acres (19% of total acres) were classified as vacant. About 26 acres were classified as partially vacant. An analysis by the number of parcels by classification shows that 78% of the parcels were classified as developed, while 7% were classified as vacant. This finding is consistent with the larger average parcel size for vacant parcels (2.3 acres).

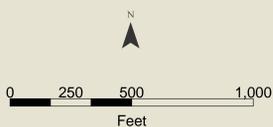
**Table 3-2. Acres by classification and plan designation, Coburg UGB, September 2003**

Classification	Central Bus Dist	Hwy Comm	Light Ind	Park/Rec	Public Water System	Residential	Total	Percent of total	Avg Parcel Size
<b>Acres</b>									
Developed	9.5	34.7	173.9			83.5	301.5	65%	0.7
Partially Vacant	3.3		6.0			16.8	26.2	6%	1.5
Public	1.2			24.2	1.5	21.8	48.7	10%	1.5
Undevelopable	0.0		0.1			0.6	0.7	0%	0.0
Vacant	2.4	25.2	13.6			45.5	86.7	19%	2.3
<b>Total</b>	<b>16.6</b>	<b>59.8</b>	<b>193.5</b>	<b>24.2</b>	<b>1.5</b>	<b>168.1</b>	<b>463.7</b>	<b>100%</b>	<b>0.9</b>
<b>Number of Parcels</b>									
Developed	36	10	41			317	404	78%	
Partially Vacant	4		1			12	17	3%	
Public	8			3	1	20	32	6%	
Undevelopable	1		7			20	28	5%	
Vacant	8	3	5			21	37	7%	
<b>Total</b>	<b>57</b>	<b>13</b>	<b>54</b>	<b>3</b>	<b>1</b>	<b>390</b>	<b>518</b>	<b>100%</b>	
Avg Parcel Size	0.3	4.6	3.6	8.1	1.5	0.4	0.9		
<b>Percent of Total</b>									
Acres	4%	13%	42%	5%	0%	36%	100%		
Parcels	11%	3%	10%	1%	0%	75%	100%		

Source: LCOG GIS data; analysis by ECONorthwest



**Map 3-2. Parcels by Classification**  
**Buildable Land Inventory**  
**City of Coburg**  
**Oregon**



- |   |                  |   |                       |
|---|------------------|---|-----------------------|
|  | Vacant           |  | Tax Lots              |
|  | Partially Vacant |  | Urban Growth Boundary |
|  | Undevelopable    |  | City Limit            |
|  | Public           |   |                       |
|  | Developed        |   |                       |

## VACANT BUILDABLE LAND

Table 3-3 and Map 3-3 show vacant and partially vacant land by plan designation in the Coburg UGB. The results identified about 26 acres classified as partially vacant, of which about 21.3 are considered vacant buildable acres. About 87 acres are classified as vacant for a total of 108 acres. The development potential of lands classified as partially vacant depends on two factors: (1) assumptions about minimum lot size; (2) the siting of any structures on the parcel. For the baseline analysis, partially vacant residential lands were classified as any lot over 20,000 square feet.

**Table 3-3. Vacant and partially vacant land by plan designation, Coburg UGB, September 2003**

Plan Designation	Partially Vacant		Vacant		Total	
	Acres	Percent	Acres	Percent	Acres	Percent
Central Business District	2.7	13%	2.4	3%	5.2	5%
Highway Commercial	0.0	0%	25.2	29%	25.2	23%
Light Industrial	5.0	23%	13.6	16%	18.6	17%
Park/Recreation	0.0	0%	0.0	0%	0.0	0%
Public Water Service	0.0	0%	0.0	0%	0.0	0%
Residential	13.6	64%	45.5	52%	59.1	55%
<b>Total</b>	<b>21.3</b>	<b>100%</b>	<b>86.7</b>	<b>100%</b>	<b>108.0</b>	<b>100%</b>

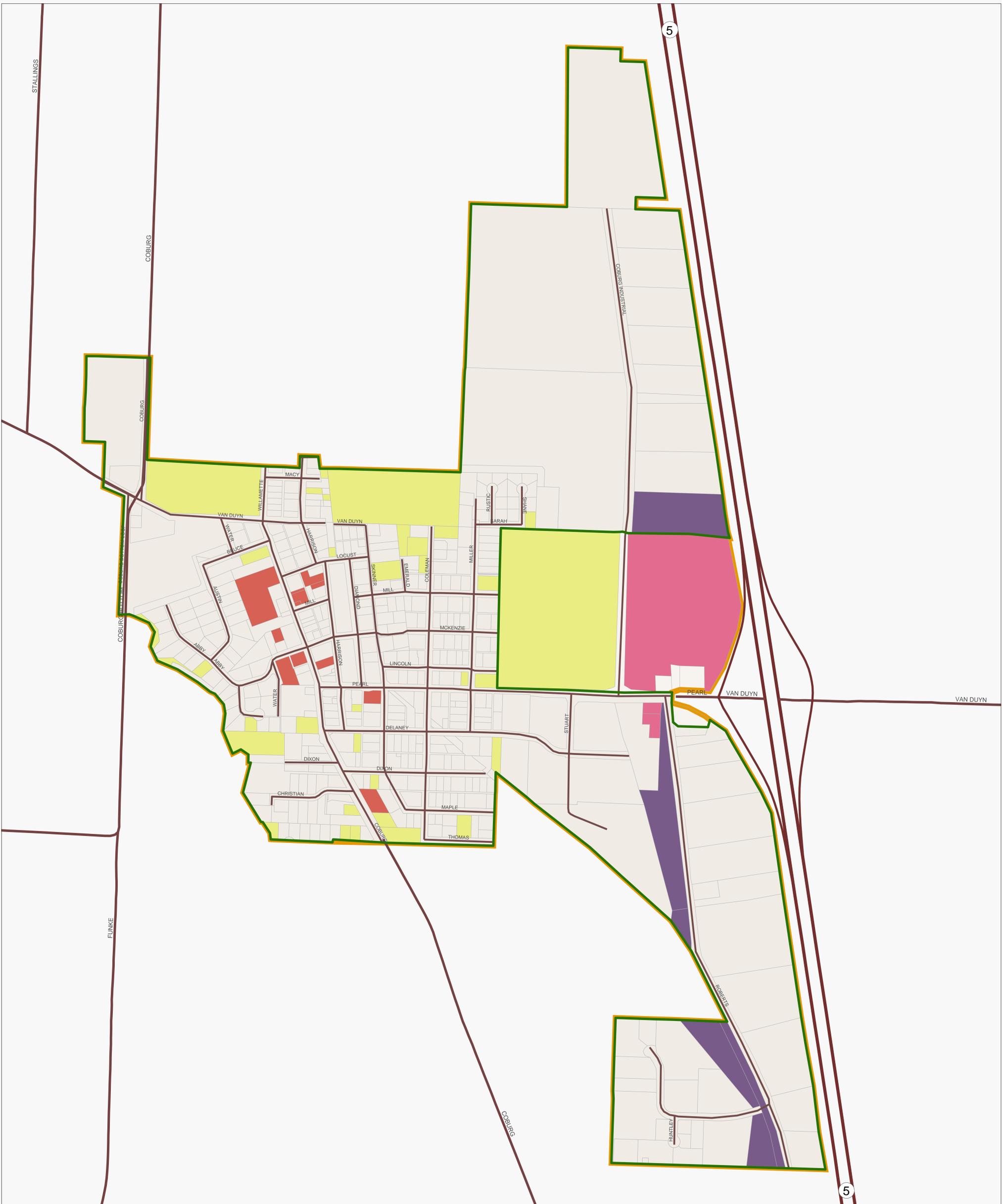
Source: LCOG GIS data; analysis by ECONorthwest  
 Note: Partially vacant includes only buildable acres.

Table 3-4 shows vacant land by plan designation by parcel size. This analysis is useful in that it shows the distribution of vacant land by parcel size, which allows an evaluation of whether a sufficient mix of parcels is available. The distribution varies by plan designation. For example, few vacant parcels exist in the Central Business District—a result that is consistent with the level of development in downtown Coburg. The residential designation shows a broader range of parcel sizes. Coburg has only two parcels greater than 20 acres in size, and none greater than 30 acres.

**Table 3-4. Vacant land by plan designation and parcel size, Coburg UGB, September 2003**

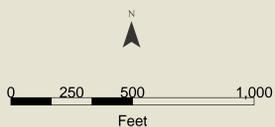
Plan Designation	Parcel Size (acres)								Total	Percent of total	Avg Parcel Size
	< 0.24	0.25 - 0.49	0.50 - 0.99	1.00 - 1.99	2.00 - 4.99	5.00 - 9.99	10.00 - 19.99	20.00 - 50.00			
<b>Acres</b>											
Central Business District	0.5	1.2	0.7						2.4	3%	0.3
Highway Commercial		0.3	0.5					24.3	25.2	29%	8.4
Light Industrial			0.8	3.6	3.2	6.1			13.6	16%	2.7
Residential	2.1	1.5	1.0				11.1	29.8	45.5	52%	2.2
<b>Total</b>	<b>2.6</b>	<b>3.1</b>	<b>3.0</b>	<b>3.6</b>	<b>3.2</b>	<b>6.1</b>	<b>11.1</b>	<b>54.1</b>	<b>86.7</b>	<b>100%</b>	<b>2.3</b>
<b>Parcels</b>											
Central Business District	3	4	1						8	22%	
Highway Commercial		1	1					1	3	8%	
Light Industrial			1	2	1	1			5	14%	
Residential	12	5	2				1	1	21	57%	
<b>Total</b>	<b>15</b>	<b>10</b>	<b>5</b>	<b>2</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>2</b>	<b>37</b>	<b>100%</b>	
Avg Parcel Size	0.2	0.3	0.6	1.8	3.2	6.1	11.1	27.0	2.3		
Percent of Total											
Acres	3%	4%	3%	4%	4%	7%	13%	62%	100%		
Parcels	41%	27%	14%	5%	3%	3%	3%	5%	100%		

Source: LCOG GIS data; analysis by ECONorthwest



# Map 3-3. Vacant and Partially Vacant Lots by Plan Designation

**Buildable Land Inventory**  
**City of Coburg**  
**Oregon**



- |   |                           |   |                       |
|---|---------------------------|---|-----------------------|
|  | Central Business District |  | Tax Lots              |
|  | Highway Commercial        |  | Urban Growth Boundary |
|  | Light Industrial          |  | City Limit            |
|  | Residential               |   |                       |

## REDEVELOPMENT AND INFILL POTENTIAL

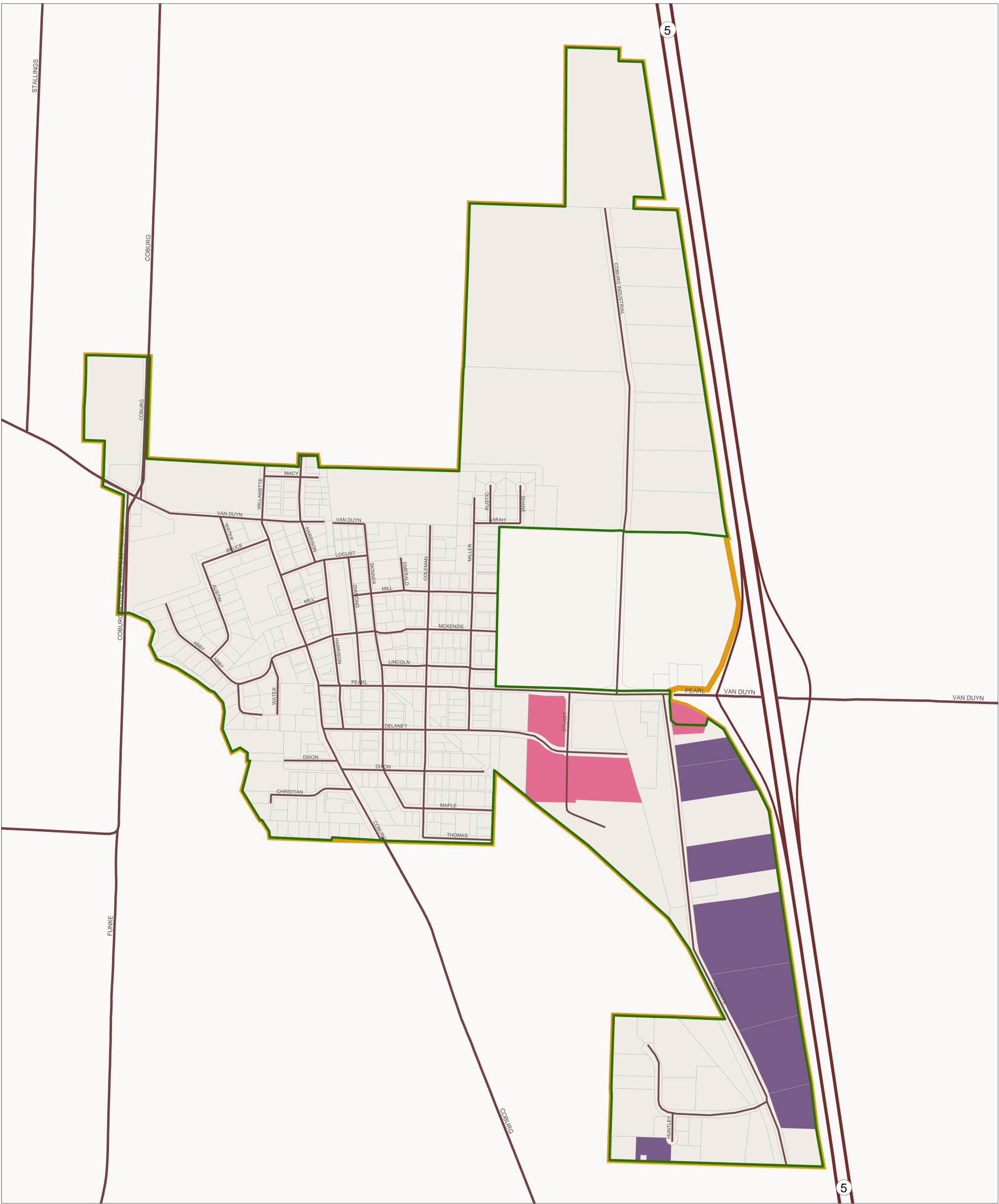
Redevelopment potential addresses land that is classified as developed that may redevelop during the planning period. While many methods exist to identify redevelopment potential, a common indicator is improvement to land value ratio. A threshold used in some studies is an improvement to land value ratio of 1:1. Not all, or even a majority of parcels that meet these criteria for redevelopment *potential* will be assumed to redevelop during the planning period. The issue of *how much* land might redevelop over the planning period is discussed in Chapter 6.

Table 3-5 shows a summary of potentially underdeveloped parcels in the Highway Commercial and plan designation. A ratio of less than 1:1 is a typical, but arbitrary, standard for identifying lands with redevelopment potential. The results show that nearly 50 acres of Highway Commercial and Light Industrial land can be considered underdeveloped using these criteria. These underdeveloped parcels include RV sales lots fronting on Interstate 5. It is unlikely that these parcels will redevelop in the short-term (less than 5 years), but provide opportunities for long-term redevelopment (in the next 5-25 years).

**Table 3-5. Underdeveloped tax lots, Coburg UGB**

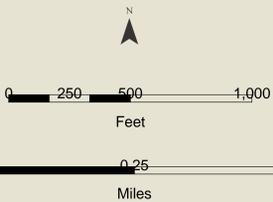
<b>Plan Designation</b>	<b>Tax Lots</b>	<b>Acres</b>
Highway Commercial	3	12.3
Light Industrial	8	36.8
<b>Total</b>	<b>11</b>	<b>49.1</b>

Source: LCOG GIS data; analysis by ECONorthwest



# Map 3-4. Developed Commercial and Industrial Tax Lots with Improvement Value Less Than Land Value

## Buildable Land Inventory City of Coburg Oregon



- |   |  |
|---|--|
| <span style="display: inline-block; width: 20px; height: 10px; background-color: red; border: 1px solid black;"></span> Central Business District | <span style="display: inline-block; width: 20px; height: 10px; background-color: lightgray; border: 1px solid black;"></span> Tax Lots |
| <span style="display: inline-block; width: 20px; height: 10px; background-color: pink; border: 1px solid black;"></span> Highway Commercial       | <span style="display: inline-block; width: 20px; height: 10px; border: 2px solid orange;"></span> Urban Growth Boundary                |
| <span style="display: inline-block; width: 20px; height: 10px; background-color: purple; border: 1px solid black;"></span> Light Industrial       | <span style="display: inline-block; width: 20px; height: 10px; border: 2px solid green;"></span> City Limit                            |
| <span style="display: inline-block; width: 20px; height: 10px; background-color: yellow; border: 1px solid black;"></span> Residential            |  |

UO InfoGraphics lab, Department of Geography  
Cartography/GIS: Ken Kato, February 2004.

Coburg also has redevelopment and infill potential in residential areas. ECO used the following definitions for the purpose of this study:

- *Redevelopment* requires the razing of existing buildings and development of new buildings at a higher density.
- *Infill* is development on vacant or partially-vacant land.

An evaluation shows that few residential parcels have improvement-to-land value ratios of less than 1:1—only 27 parcels totaling 61 acres. Because residents, stakeholders, and elected officials expressed concern about infill, we do not consider any of this land to be redevelopable within the planning period. While this capacity exists under the existing residential zone standards (which allow duplexes, triplexes and fourplexes in the residential zone), it appears that little support exists for continuing this policy and that the residential zone may be amended as part of the comprehensive plan update.

ECO evaluated infill potential in existing residential areas using lot sizes. Table 3-6 shows the number of lot. Based on input that ECO received during Planning Commission and City Council work sessions, lots 14,000 square feet or larger were assumed to have infill potential.<sup>10</sup> Not all of these lots will be partitionable lots, however. The building footprint will preclude portioning of many of the lots. Moreover, landowner willingness will be a factor.

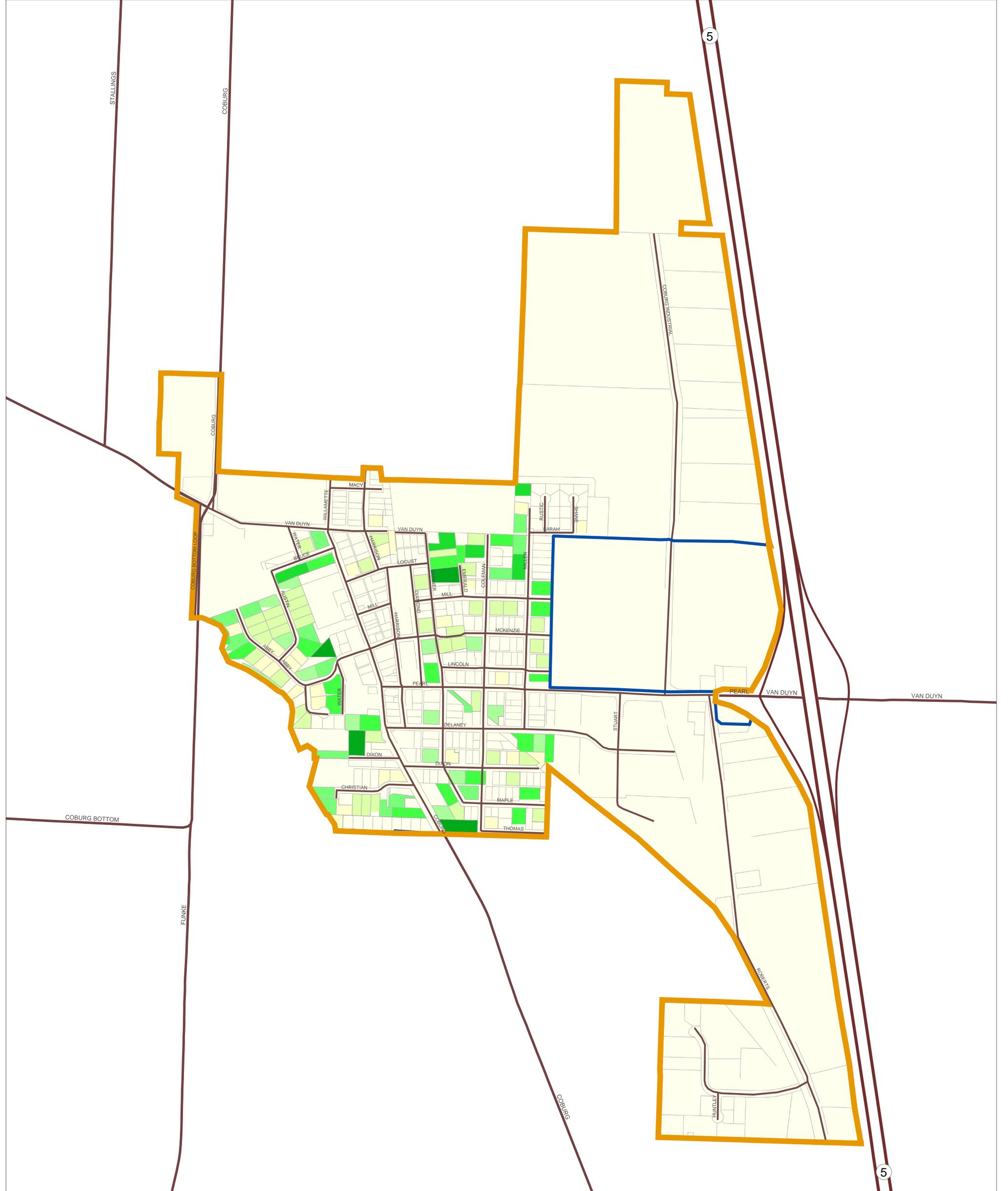
**Table 3-6. Infill potential in developed residential areas, Coburg City Limit**

Size (sq ft)	Number of Lots	Acres	Infill Potential
<b>Lots with no infill potential</b>			
<10000	133	20.7	0
10000-11999	38	9.6	0
12000-13999	13	3.8	0
<b>Lots with infill potential</b>			
14000-15999	21	7.1	21
16000-17999	11	4.3	11
18000-19999	5	2.2	5
20000-24999	12	6.1	12
25000-40000	5	3.6	5
<b>Total</b>	<b>238</b>	<b>57.4</b>	<b>54</b>

Source: LCOG GIS data; analysis by ECONorthwest  
 Note: Lots smaller than 14000 square feet were not considered to have infill potential

<sup>10</sup> The data in Table 3-6 only address infill through the partitioning of lots. The City could choose to adopt other policies, such as accessory dwelling units, that would increase the density and number of dwelling units in developed residential areas of Coburg.

Using improvement-to-land value ratios as an indicator of redevelopment potential suggests that some redevelopment and infill potential exists in Coburg at this time. Over time, that relationship can change in response to both market conditions and public policy. For example, a tight UGB or high system development charges could increase the value of land relative to the value of improvements, which would move in the direction of more redevelopment.



# Map 3-5. Residential Infill Potential

## Buildable Land Inventory

### City of Coburg

### Oregon



#### Residential Lots

##### Size Classes

- 12,000 - 14,000 sq. ft.
- 14,000 - 16,000 sq. ft.
- 16,000 - 18,000 sq. ft.
- 18,000 - 20,000 sq. ft.
- 20,000 - 25,000 sq. ft.
- 25,000 - 30,000 sq. ft.
- 30,000 - 43,560 sq. ft.

- Tax Lots
- Current UGB
- City Limits

UO InfoGraphics lab, Department of Geography  
 Cartography/GIS: Ken Kato, Jesse Manley, January 2004.

## CAPACITY ANALYSIS

The final step in a residential buildable lands inventory was to estimate the holding capacity of vacant, partially vacant, and redevelopable land. The holding capacity of residential land is measured in dwelling units and is dependent on densities allowed in specific zones.

Land capacity is a function of buildable land and density. The buildable lands inventory indicates that Coburg has about 108 acres of vacant and partially vacant land. Table 3-7 provides a general estimate of how much population and employment could be accommodated by those lands.

**Table 3-7. Estimated development capacity, Coburg UGB**

Land Use	Density	Acres	Development Potential	
			DU	Jobs
Residential	4 du/gra	59.1	240	
Hwy Commercial	10 emp/ac	25.2		250
Central Business District	20 emp/ac	5.2		120
Light Industrial	15 emp/ac	18.6		300
Underdeveloped	15 emp/ac	49.1		750
Expansion Areas (existing businesses)	na	na		500
<b>Total</b>		<b>108.0</b>	<b>240</b>	<b>1,920</b>

Source: LCOG GIS data; analysis by ECONorthwest

Notes: Underdeveloped sites are sites with an improvement to land value ratio of less than 1:1 (in other words the value of the improvements is less than the value of the land)

Expansion areas are areas owned by existing firms that could accommodate additional employment by those firms.

Employment capacity on "Underdeveloped" is an estimate of capacity *if* all underdeveloped land were to redevelop at higher densities. The assumptions concerning redevelopment are described in Chapter 6.

While the back-of-the-envelope calculations above provide a crude estimate of residential capacity, several other factors must be considered in developing a more refined capacity estimate. Parcelization patterns, density, development constraints, zoning, and serviceability are some of the more important factors.

# Housing Needs Analysis

## Chapter 4

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This chapter provides the technical analysis to update the Housing (Goal 10) element of the Coburg Comprehensive Plan. Statewide Planning 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. 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.” This definition includes government-assisted housing and mobile home or manufactured dwelling parks as provided in ORS 197.303 and ORS 197.475 to 197.490. For communities with populations greater than 2,500 and counties with populations greater than 15,000, needed housing types include (but are not limited to):

- Attached and detached single family housing and multiple-family housing for both owner and renter occupancy; and
- Manufactured homes on individual lots planned and zoned for single-family residential use.

Coburg does not meet the population threshold for these statutory requirements; however, Goal 10 requires all incorporated cities to address housing need in their comprehensive plans. The housing needs analysis in this chapter addresses these housing types.

In 1996, the Oregon legislature passed House Bill 2709 which is now codified as ORS 197.296. According to DLCDC staff, Coburg was *not* bound to the full requirements of ORS 197.296 at the time this report was written. The City, however, is interested in assessing housing needs that are based on population forecasts that assume the development of a sanitary sewer system, accommodating families, seniors and workers, and other goals identified in the *Coburg Crossroads Vision, 2003*. The analysis that follows assumes that Coburg will have sewers available to serve the population and employment forecasted for the period 2002 – 2025 and through 2050.

## METHODS

While Coburg is not required to comply with all provisions of ORS 197.296, ECONorthwest generally followed the methodology described in the DLCDC report *Planning for Residential Development*, referred to as the “workbook.” The workbook generally describes seven steps in conducting an housing needs analysis:

1. Determine the number of new housing units needed in the next 20 years.
2. Identify relevant national, state, and local demographic trends that will affect the 20-year projection of structure type mix.
3. Describe the demographic characteristics of the population, and household 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.
5. Estimate the number of additional new units by structure type.
6. Determine the density ranges for all plan designations and the average net density for all structure types.
7. Evaluate unmet housing needs and the housing needs of special populations (Goal 10 needs).

While the housing need analysis presented in this chapter generally follows the methodology described in the *Workbook*, it does not include as much detail as an analysis that would be required under ORS 197.296. The housing needs assessment in this chapter is based on the assumption that Coburg will develop a sanitary sewer and that it desires to provide housing that meets the needs of individuals that are currently employed in Coburg, families, and seniors. These assumptions are consistent with goals and policies documented in the *Coburg Crossroads Vision 2003*.

The remainder of this chapter is organized into three sections. The first section describes residential development trends in Coburg, the second describes demand for new housing units over the 20-year planning period; and the third addresses housing needs.

## RESIDENTIAL DEVELOPMENT TRENDS

ORS 197.296 requires an evaluation of the housing type mix and density of residential development during the past five years or since the last periodic review, whichever is longer. While Coburg is not bound to comply with this requirement, an evaluation of recent development trends is useful in developing a better understanding of development trends in the local housing market.

Table 4-1 shows dwelling units by type in Coburg in 1990 and 2000 as reported by the Census. According to the Census, Coburg had 311 dwelling units in 1990 and 387 dwelling units in 2000—an increase of 76 dwelling units. Notably, Coburg added 94 single-family detached units during this period, three multiple family units—and lost 21 mobile/manufactured units. The percentage of single-family detached dwelling units increased from 70% in 1990 to 80% in 2000. The Census data suggest that housing development in Coburg during the 1990s was almost exclusively single-family detached housing types. Housing types that are affordable to lower income households (multifamily, mobile/manufactured) decreased both in number and as a share of all housing.

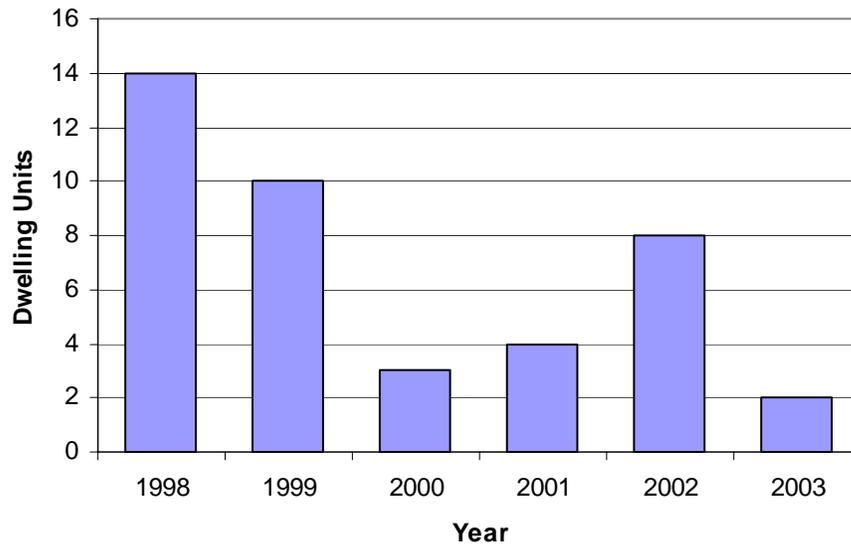
**Table 4-1. Dwelling units by type, Coburg City Limit, 1990 and 2000**

Housing Units	1990 Census		2000 Census		New DU 90-00	
	Number	Percent	Number	Percent	Number	Percent
Single-family detached	217	70%	311	80%	94	124%
Single-family attached	2	1%	2	1%	-	0%
Multiple family	26	8%	29	7%	3	4%
Mobile/Manufactured	66	21%	45	12%	(21)	-28%
<b>Total housing units</b>	<b>311</b>	<b>100%</b>	<b>387</b>	<b>100%</b>	<b>76</b>	<b>100%</b>

Source: US Census of Population and Housing

Figure 4-1 shows building permits issued for new residential construction in Coburg annually between 1998 and September 2003. The data show that only 41 permits were issued in Coburg between January 1998 and September 2003. Moreover, the number of permits issued varies from year to year, with the largest number issued in 1998 (14) and fewest issued in 2003 (2).

**Figure 4-1. Building permits issued, Coburg, January 1998-September 2003**



Source: City of Coburg

The average net density of single-family residences for which permits were issued between January 1998 and September 2003 was 3.9 dwelling units per net residential acre.<sup>11</sup> The results are not surprising; residential development in Coburg has occurred at very low densities. Coburg has a 10,000 square foot minimum lot size in the residential zone because all dwellings must be served by septic tanks.

## **NEW DWELLING UNITS NEEDED, 2002-2025 AND 2025-2050**

Estimating total new dwelling units needed during the planning period is a relatively straightforward process. Demand for new units is based on the county coordinated population forecast as required by ORS 195.036 and ORS 197.296. Persons in group quarters are then subtracted from total persons to get total persons in households. Total persons in households is divided by persons per household to get occupied dwelling units. Occupied dwelling units are then inflated by a vacancy factor to arrive at total new dwelling units needed.

The following sections step through that logic and describe the basis for the assumptions applied to the estimate of demand for new dwelling units.

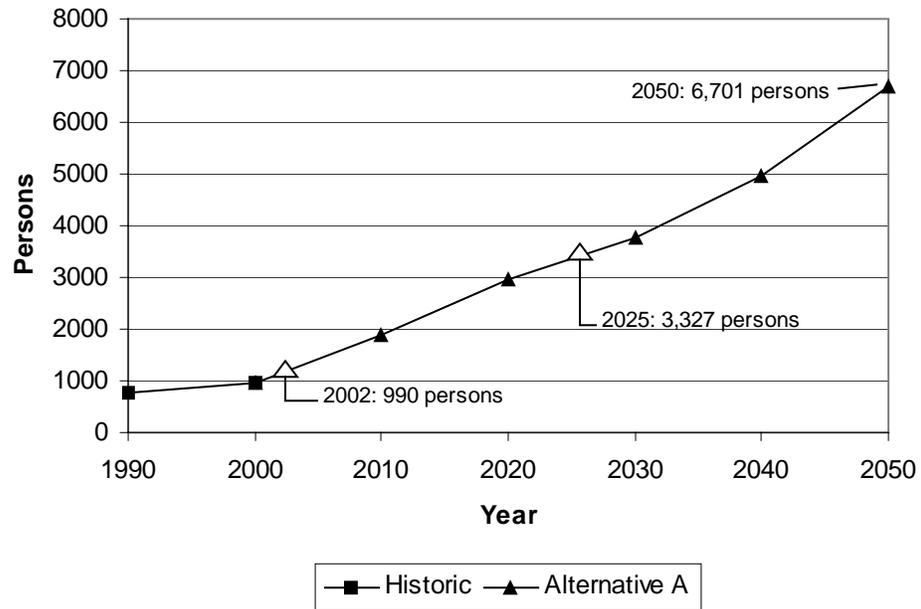
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<sup>11</sup> Building permit data would typically also be categorized by plan designation or zoning. Coburg, however, only has one residential plan designation and one residential zone at this time.

## POPULATION

Figure 4-2 shows historical and forecast population for Coburg between 1989 and 2050. The 2000 Census indicates Coburg's population was 969 persons. According to the Population Research Center at Portland State University, population increased to 990 in 2002 and 1,050 in 2003.<sup>12</sup> Coburg's 2025 population forecast is 3,327 persons; the 2050 forecast is 6,701 persons.<sup>13</sup> This represents an increase of 2,337 persons between 2002 and 2025 and an increase of 3,374 persons between 2025 and 2050.

**Figure 4-2. Coburg population forecast Alternative A, 1980-2050**



Source: Coburg Crossroads Vision, 2003

## 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, one assumes that 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.

<sup>12</sup> ECO uses a 2002 base population year to be consistent with the base year for the employment forecasts.

<sup>13</sup> At the time this study was completed, Coburg's population forecasts had not been officially coordinated. The forecasts used for this study were the preferred forecasts identified in the City's visioning process.

According to Census data, no persons resided in group quarters in 2000 in Coburg. The fact that no group quarters existed in Coburg in 2000 does not mean that group quarters will not exist here in the future. The key area where one would expect changes in group quarters are in nursing homes. Consistent with the overall aging of the population, ECO expects persons in nursing homes to increase at a faster rate than the overall population. About 2.3% of Lane County's population resided in group quarters in 2000. Of the 7,418 County residents in group quarters, 1,046 (0.3% of all County residents) were in nursing homes.

If one assumes that Coburg's population is similar to the County's and that the percentage of persons in nursing homes remains constant in the future, about 100 persons would reside in nursing homes in 2025 and about 200 in 2050. Thus, Coburg will need to plan for some persons in group homes. This is consistent with the desire to provide housing for seniors expressed in the *Coburg Crossroads Vision, 2003*.

## **AVERAGE HOUSEHOLD SIZE**

In the 1980s, traditional families (married couple, with one or more children at home) accounted for 29% of all households in Oregon. In 1990 that percentage had dropped to 25%; which further decreased to 23% in 2000. It will continue to fall, but probably not as dramatically. 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. 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.

Inconsistent with national and state trends, household sizes in Coburg increased from 2.52 in 1990 to 2.64 in 2000. This increase is related, at least in part, to the City's restriction on lot size and the fact that the majority of dwellings built between 1990 and 2000 were single-family detached. The draft Buildable Lands Inventory developed by the Lane Council of Governments (LCOG) in 1997 used a household size assumption of 2.3 persons; the City's initial Transportation System Plan (TSP) used an average household size of 2.24 persons per household.

Table 4-3 shows average household size for estimates by tenure for Lane County and Coburg in 2000. The data show that Lane County's average household size was 2.42 persons in 2000—a figure higher than assumptions used in the 1997 LCOG Buildable Lands Study, or the TSP. Moreover, the data show that household size depends on tenure—renters have smaller households than homeowners.

**Table 4-3. Average household size, Lane County and Coburg, 2000**

<b>Year</b>	<b>Persons Per HH</b>
Lane County	
Average Household Size	2.42
Owner-occupied units	2.52
Renter occupied units	2.25
Coburg	
Average Household Size	2.64
Owner-occupied units	2.75
Renter occupied units	2.21

Source: US Bureau of the Census

Future housing mix and tenure are an important variable in a housing needs analysis. The data shown in Table 4-1 make it clear that the City has had little multiple family housing developed which would tend to restrict the availability of rentals. For the purpose of this study, ECO assumed an average household size of 2.75 persons for owner-occupied units and of 2.20 for renter-occupied units.

## VACANCY RATES

Vacant units are the final variable in the basic housing demand model. Vacancy rates are cyclical and represent the lag between demand and the market's response to demand in additional dwelling units. Analysts consider a 2%-4% vacancy rate typical for single-family units; 4%-6% is typical for multifamily residential markets. According to the 2000 Census, about 8% of single-family housing in Coburg was vacant and no multiple family housing was vacant. For this study we use 2.5% as a base assumption for single-family units and 5.0% as a base assumption for multiple family units.

## FORECAST OF NEW HOUSING UNITS, 2002-2025 AND 2002-2050

The preceding analysis leads to a forecast of new housing units likely to be built in the Coburg for the period 2002-2025 and 2002-2050. Table 4-4 summarizes the analysis. Based on the assumptions shown in Table 4-4, Coburg will need 882 new dwelling units to accommodate population growth between 2002 and 2025 and 2,172 dwelling units to accommodate growth between 2002 and 2050. These figures are very close to the estimates prepared for the *Coburg Crossroads Community Visioning* process.<sup>14</sup>

The forecast of new units does not include dwellings that will be demolished and replaced. This analysis does not factor those units in; it

<sup>14</sup> The estimates presented on page 48 of the visioning document show a need for 855 units by 2025 and 2,131 units by 2050. The estimates then reduce these figures to accommodate for infill.

assumes they will be replaced at the same site and will not create demand for residential land.

**Table 4-4. Demand for new housing units, Baseline Assumptions  
Coburg, 2002-2025 and 2002-2050**

<b>Variable</b>	<b>2002-2025</b>	<b>2002-2050</b>
Change in persons	2,337	5,711
-Change in persons in group quarters	100	200
=Persons in households	2,237	5,511
<b>Single-family dwelling units</b>		
Percent single-family DU	80%	80%
Persons in single-family households	1,790	4,409
÷Persons per occupied single family DU	2.75	2.75
New occupied single-family DU	651	1,603
Vacancy rate	2.5%	2.5%
New single-family DU	667	1,644
<b>Multiple family dwelling units</b>		
Percent multiple family DU	20%	20%
Persons in multiple-family households	447	1,102
÷Persons per occupied multiple family DU	2.20	2.20
New occupied multiple-family DU	203	501
Vacancy rate	5.0%	5.0%
New multiple family DU	214	527
<b>Totals</b>		
Occupied DU	854	2,104
Vacant DU	27	67
<b>=Total new dwelling units</b>	<b>882</b>	<b>2,172</b>
<b>Aggregate household size (persons/occupied DU)</b>	<b>2.54</b>	<b>2.54</b>
<b>Dwelling units needed annually</b>	<b>37</b>	<b>44</b>

Source: Calculations by ECONorthwest based on Alternative A population forecasts and US Census data.

The next step in the process is to develop a forecast of new housing units by type (e.g., single-family, multiple family, manufactured, etc.). Historical data for Coburg, however, is of limited use in developing forecasts of new housing units by type. Development trends between 1990 and 2000 are strongly influenced by the lack of a sanitary sewer system. Thus, the allocations that follow are based on consideration of demographic trends as well as input received during the November community workshop.

ORS 197.296 requires communities to consider the mix and density of housing types built in the last five years or since the last periodic review whichever is longer. The baseline forecast uses data on the mix and density that is reflected by the City's current housing stock—assumptions that are consistent with the City's acknowledged comprehensive plan. That approach, however, does not recognize demographic trends, and policies cities may adopt to encourage a different mix of housing than was built in the past. The second allocation (in the next section on Housing Needs) represents an alternative simulation of how local policies that address housing need (and

are consistent with ORS 197.296) could affect housing mix (the Alternative Forecast).

Table 4-5 shows the baseline forecast of new dwelling units and land need by type. The planned residential mix was 74% single-family, 16% manufactured (mobile home), and 10% multiple family. The baseline forecast indicates that Coburg will need about 199 net residential acres, or about 259 gross residential acres to accommodate new housing between 2002 and 2025. About 490 net residential acres and 638 gross residential acres would be required to accommodate new housing between 2002 and 2050.<sup>15</sup>

**Table 4-5. Baseline forecast of new dwelling units and land need by type, Coburg, 2002-2025 and 2002-2050**

Housing Type	2002-2025					2002-2050				
	New DU	Percent	Net Acres	Density (DU/net res ac)	Gross Acres	New DU	Percent	Net Acres	Density (DU/net res ac)	Gross Acres
Single-family detached	652	74%	163.1	4.0	217.4	1,607	74%	401.8	4.0	535.7
Manufactured	141	16%	28.2	5.0	33.2	347	16%	69.5	5.0	81.8
Subtotal	793	90%	191.3	4.1	250.6	1,955	90%	471.3	4.1	617.4
<b>Multi-family</b>										
Single-family attached	-	0%	na	na	na	-	0%	na	na	na
Multi-family	88	10%	7.3	12.0	8.2	217	10%	18.1	12.0	20.1
Subtotal	88	10%	7.3	12.0	8.2	217	10%	18.1	12.0	20.1
<b>Total</b>	<b>882</b>	<b>100%</b>	<b>198.6</b>	<b>4.4</b>	<b>258.8</b>	<b>2,172</b>	<b>100%</b>	<b>489.4</b>	<b>4.4</b>	<b>637.5</b>

Source: ECONorthwest

## HOUSING NEEDS ANALYSIS

The DLCD Workbook describes five steps in analyzing housing needs in a community. Specifically, these steps are:

1. Identify relevant national, state, and local demographic and economic trends and factors that may affect the 20-year projection of structure type mix.
2. Describe the demographic characteristics of the population and, if possible, housing trends that relate to demand for different types of housing.
3. Determine the types of housing that are likely to be affordable to the projected households based on household income.

<sup>15</sup> A *Gross Vacant Acre* is an acre of vacant land before land has been dedicated for public right-of-way, private streets, or public utility easements. For example, a standard assumption is that about 20% of land in a subdivision is used for streets and utilities: if so, then a gross vacant acre will yield only about 35,000 sq. ft. (80% of a full acre) for lots.

A *Net Vacant Acre* is an acre of vacant land after land has been dedicated for public right-of-way, private streets, or utility easements. A net vacant acre has 43,560 square feet available for construction, because no further street or utility dedications are required: all the land is in lots.

4. Estimate the number of additional needed units by structure type.
5. Determine the needed density ranges for each plan designation and the average needed net density for all structure types.

The remainder of this section is organized around this five-step process.

## **STEP 1. IDENTIFY RELEVANT NATIONAL, STATE, AND LOCAL DEMOGRAPHIC AND ECONOMIC TRENDS AND FACTORS THAT MAY AFFECT THE 20-YEAR PROJECTION OF STRUCTURE TYPE MIX**

The first step in a housing needs assessment is to identify relevant national, state, and local demographic and economic trends and factors that affect local housing markets. The evaluation that follows is based on previous research conducted by ECONorthwest for other housing needs studies as well as new research to update the evaluation of trends that may affect housing mix.

The Joint Center for Housing Studies of Harvard University's *The State of the Nation's Housing, 2003* report summarizes the national housing outlook for the next decade as follows:<sup>16</sup>

“When the economy regains momentum and the lingering effects of the recession subside, housing is well-positioned for another solid decade. Median incomes and wealth for all age groups are higher today than ten years ago. These gains, together with continued strong immigration, should lift household growth and housing investment above 1990s levels. Nevertheless, both low- and moderate-income households will continue to have difficulty finding affordable housing.”

While this presents a relatively optimistic outlook for housing in the next decade, it does point to difficulties for low- and moderate-income households. A number of national factors identified in *The State of the Nation's Housing 2003* will affect housing trends in Oregon:

- Over the next ten years, the aging baby-boomers will continue to support the trade-up market, increase spending on professional remodeling projects, and create demand for more expensive rentals. As the echo boomers move into their 20s, they will generate demand for smaller apartments and starter homes. At the same time, housing providers and the financial system will face the growing challenge of supplying units to low-income and minority households.
- The aging of the population, and of the baby boomers in particular, will drive changes in the age distribution of households in all age groups over 55 years. Baby boomers, however, do not appear to be in a

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<sup>16</sup> *The State of The Nation's Housing, 2003*, The Joint Center for Housing Studies of Harvard University. Available online at <http://www.jchs.harvard.edu/publications/markets/son2003.pdf>.

rush to downsize. While more than half of the oldest boomers (aged 45 to 54 in 2000) moved during the 1990s, they typically traded up to newer homes with more amenities.

- Because of the persistent disparities between rich and poor households and between white and minority households, 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 such as capital availability and zoning may, however, outweigh these demographic forces. In this case, production could tilt even more toward single-family detached homes despite growing pressure for higher-density, lower-cost housing.
- While further homeownership gains are likely during this decade, they are not assured. Additional progress depends in part on preserving the recent increases achieved by low-income households. It also rests on whether the conditions that have fueled homeownership growth can be sustained.
- The past ten years have established a momentum that should keep homeownership rates—especially among minorities—headed higher. If conditions remain favorable and the momentum persists, as many as 11.0 million more households will join the homeowner ranks between 2000 and 2010.
- Over the longer term, rental housing demand should grow even if the national homeownership rate continues its steady ascent.
- Growth in young adult households will increase demand for moderate rentals, especially when the echo boomers reach their mid-20s after 2010. Meanwhile growth among those between the ages of 45 and 64 will lift demand for higher-end rentals.

## **STEP 2. DESCRIBE THE DEMOGRAPHIC CHARACTERISTICS OF THE POPULATION AND, IF POSSIBLE, HOUSING TRENDS THAT RELATE TO DEMAND FOR DIFFERENT TYPES OF HOUSING**

ECONorthwest reviewed data from the U.S Bureau of Census *Current Construction Reports* to identify national trends in the characteristics of new housing. Nationally, several shifts in the characteristics of housing are evident:

- *Larger single-family units on smaller lots.* Between 1992 and 2002 the median size of new single-family dwellings increased 11%, from 1890 sq. ft. to 2,127 sq. ft. in the Western Region. Moreover, the percentage of units under 1,200 sq. ft. decreased from 8% in 1992 to 4% in 1997. The percentage of units greater than 2,500 sq. ft. increased from 28% in 1992 to 39% in 2002.

- *Larger multifamily units*—between 1994 and 2002, the median size of new multiple family dwelling units in the Western Region increased 15%, from 920 sq. ft. to 1,055 sq. ft. Moreover, the percentage of units with less than 600 sq. ft. decreased from 6% to 1%, while the percentage with more than 1,200 sq. ft. increased from 11% to 30%.
- *More household amenities*—between 1992 and 2002 the percentage of single-family units built with amenities such as central air conditioning, fireplaces, brick exteriors, 2 or more car garages, or 2 ½ or more baths increased. The same trend 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.<sup>17</sup> Using historical or current demographic characteristics of Coburg, however, will probably yield inaccurate results. Not only are the demographic characteristics expected to change regionally, but new residents in Coburg will probably be more diverse in socio-economic and demographic characteristics than current residents.

ECONorthwest used Public Use Microsample (PUMS) data from the 2000 Census to describe the relationship between selected demographic characteristics and housing choice.<sup>18</sup> This analysis identified several key relationships:

- 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.

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<sup>17</sup> This linkage is identified in the DLCD Workbook. It is described in detail in *Households and Housing: Choice and Outcomes in the Housing Market*, Clark and Dieleman, Center for Policy Research, 1996.

<sup>18</sup> ECO used the 1% Public Use Microsample (PUMS) data set for this analysis. A description of the PUMS data can be found at [www.census.gov/](http://www.census.gov/).

### STEP 3. DETERMINE THE TYPES OF HOUSING THAT ARE LIKELY TO BE AFFORDABLE TO THE PROJECTED HOUSEHOLDS BASED ON HOUSEHOLD INCOME

Step three 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 household incomes of individuals that work at major employers in Coburg and evaluation of income trends in Lane County.

A typical standard used to determine housing affordability is that a household should pay no more than 30% of its total monthly household income for housing, including utilities. According to the U.S. Census, nearly 80 households in Coburg—about 28%—paid more than 30% of their income for housing in 2000.

One way of exploring the issue of financial need is to review wage rates and housing affordability. Table 4-6 shows an analysis of affordable housing wage and rent gap for households in Coburg 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 about \$13.00 an hour to afford a two-bedroom unit according to HUD's market rate rent estimate.

**Table 4-6. Analysis of affordable housing wage and rent gap by HUD income categories, Lane County, 2003**

Value	Minimum					
	Wage	30% MFI	50% MFI	80% MFI	100% MFI	120% MFI
Annual Hours	2086	2086	2086	2086	2086	2086
Minimum Wage	\$6.50	\$7.72	\$12.87	\$20.59	\$25.74	\$30.89
Annual Wage At Minimum Wage	\$13,559	\$16,100	\$26,850	\$42,950	\$53,700	\$64,440
Annual Affordable Rent	\$4,068	\$4,830	\$8,055	\$12,885	\$16,110	\$19,332
Monthly Affordable Rent	\$339	\$403	\$671	\$1,074	\$1,343	\$1,611
HUD Fair Market Rent(2 Bedroom)	\$675	\$675	\$675	\$675	\$675	\$675
Is HUD Fair Market Rent Higher Than The Monthly Affordable Rent? Yes						
Rent Paid Monthly OVER 30% of Income	\$336	\$273	\$4	na	na	na
Rent Paid Annually OVER 30% of Income	\$4,032	\$3,270	\$45	na	na	na
Percentage of Income Paid OVER 30% of Income for Rent	30%	20%	0%	na	na	na
Total Spent on Housing	60%	50%	30%	19%	15%	13%
For this area what would the "Affordable Housing Wage" be?	\$12.94	\$12.94	\$12.94	\$12.94	\$12.94	\$12.94
The Affordable Housing Wage Gap IS:	\$6.44	\$5.23	\$0.07	na	na	na

Source: HUD, Oregon office; analysis by ECONorthwest

MFI: Median family income

Table 4-7 shows wage levels by industrial sector and housing affordability estimates for Coburg. The data indicate that the average hourly wage in for covered employment in Coburg is nearly \$15.50. A household earning this income could afford approximately \$800 per month for rent or a mortgage of about \$80,000. The data show some variation by sector, however, the majority of jobs (about 78%) are in the "All Other" category.<sup>19</sup> It is important

<sup>19</sup> It was necessary to group a large percentage of employment into a general category to comply with confidentiality rules.

to note that the data in Table 4-7 represent average pay per worker. According to the 2000 Census about 12% of households had no workers, 30% of households had one worker, 45% had two workers, and 13% had three or more workers. Thus, nearly 60% of households have multiple incomes.

**Table 4-7. Number of jobs, average wage, and housing affordability thresholds, Coburg 2002**

Sector/Industry	Jobs	Avg Annual Pay	Est Hourly Wage	Est. Affordable Housing Threshold	
				Rent	Own
Construction	151	\$40,953	\$19.63	\$1,024	\$102,382
Wholesale Trade	195	\$39,226	\$18.80	\$981	\$98,065
Retail Trade	213	\$18,705	\$8.97	\$468	\$46,762
Services	105	\$22,318	\$10.70	\$558	\$55,795
All Other	2324	\$32,786	\$15.72	\$820	\$81,966
<b>Total</b>	<b>2988</b>	<b>\$32,248</b>	<b>\$15.46</b>	<b>\$806</b>	<b>\$80,619</b>

Source: Employment Security 202 data, Oregon Employment Department; analysis by ECONorthwest

The total amount a household spends on housing is referred to as cost burden. Total housing expenses are generally defined to include 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.

Table 4-8 shows housing costs as a percent of income by tenure for Coburg households in 2000. The data show that about 28% of Coburg households experienced cost burden in 2000. The rate was much higher for renters (43%) than for homeowners (24%).

**Table 4-8. Housing cost as a percentage of household income, Coburg 2000**

Percent of Income	Renters		Owners		Total	
	Number	Percent	Number	Percent	Number	Percent
Less than 20%	26	40%	112	45%	138	44%
20% - 30%	11	17%	79	31%	90	28%
30% - 40%	9	14%	29	12%	38	12%
40% - 50%	4	6%	10	4%	14	4%
50% or More	15	23%	21	8%	36	11%
Total	65	100%	251	100%	316	100%
<b>Cost Burden</b>	<b>28</b>	<b>43%</b>	<b>60</b>	<b>24%</b>	<b>88</b>	<b>28%</b>

Source: 2000 Census

Table 4-9 shows a rough estimate of affordable housing cost and units by income levels for Coburg in 2000. Several points should be kept in mind when interpreting this data:

- Because all of the affordability guidelines are based on median family income, they provide a rough estimate of financial need and 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 Coburg 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 4-9 indicate that:

- Nearly 20% of Coburg households cannot afford a studio apartment according to HUD's estimate of \$378 as fair market rent;
- More than 30% of Coburg households cannot afford a two-bedroom apartment at HUD's fair market rent level of \$675;
- A household earning median family income (\$50,900) can afford a home valued up to about \$127,250.

**Table 4-9. Rough estimate of housing affordability, Coburg, 2000**

Income Level	Number of HH	Percent	Affordable Monthly Housing Cost	Crude Estimate of Affordable Purchase Owner-Occupied Unit	Number of Owner Units	Number of Renter Units	Surplus (Deficit)	Notes
Under \$10,000	30	8.5%	\$0 to \$250	\$0 to \$25,500	0	0	-30	
\$10,000-\$19,999	40	11.4%	\$250 to \$500	\$25,000 to \$50,000	5	15	-20	HUD FMR studio: \$378
\$20,000-\$24,999	16	4.6%	\$500 to 625	\$50,000 to \$62,500	4	26	14	HUD FMR 1 bedroom: \$518
\$25,000-\$29,999	21	6.0%	\$625 to \$750	\$62,500 to \$75,000	11	7	-3	HUD FMR 2 bedroom: \$675
\$30,000-\$34,999	25	7.1%	\$750 to \$875	\$75,000 to \$87,500	18	7	0	
\$35,000-\$39,999	27	7.7%	\$875 to \$1,000	\$87,500 to \$100,000	29	7	9	HUD FMR 3 bedroom: \$943
\$40,000-\$49,999	27	7.7%	\$1,000 to \$1,250	\$100,000 to \$125,000	57	3	33	HUD FMR 4 bedroom: \$1,089
Lane County Median: \$50,900			\$1,273	\$127,250				
\$50,000-\$74,999	84	23.9%	\$1,250 to \$1,875	\$125,000 to \$187,500	94	1	11	
\$75,000-\$99,999	34	9.7%	\$1,875 to \$2,450	\$187,500 to \$245,000	31	1	-2	
\$100,000-\$149,999	35	10.0%	\$2,450 to \$3,750	\$245,000 to \$375,000	40	0	5	
\$150,000 and over	12	3.4%	More than \$3,750	More than \$375,000	10	0	-2	
<b>Total</b>	<b>351</b>	<b>100.0%</b>			<b>299</b>	<b>67</b>		

Sources: 2000 Census, and Oregon Housing & Community Services. Housing Strategies Workbook: *Your Guide to Local Affordable Housing Initiatives*, 1993.

Notes: FMR-Fair market rent

The conclusion based on the data presented in this section is that Coburg currently has a deficit of affordable housing for households that earn less than \$30,000 annually (about \$15.00 per hour).

As a final step in the housing affordability analysis, ECO performed a rough correlation of income with needed housing types as defined by ORS 195.303. This analysis is also consistent with guidance provided in the Workbook.<sup>20</sup> Table 4-10 shows ECO's evaluation for market segments, incomes, and financially attainable housing products. We use the HUD income guidelines as the market segments and Census data for the income distribution. The table provides an estimate of financially attainable housing types by income and tenure. Households in the upper-middle and high-income segments will be able to afford new housing.

**Table 4-10. Financially attainable housing type by income range**

Market Segment by Income	Income range	Number of Households	Percent of Households	Financially Attainable Products		
				Owner-occupied	Renter-occupied	
High (120% or more of MFI)	\$61,000 or more	116	33%	All housing types; higher prices	All housing types; higher prices	↑ Primarily New Housing
Upper Middle (80%-120% of MFI)	\$50,000 to \$61,000	46	13%	All housing types; lower values	All housing types; lower values	
Lower Middle (50%-80% of MFI)	\$25,500 to \$50,000	100	28%	Manufactured on lots; single-family attached; duplexes	Single-family attached; detached; manufactured on lots; apartments	↑ Primarily Used Housing
Low (25%-50% or less of MFI)	\$12,725-\$25,500	52	15%	Manufactured in parks	Apartments; manufactured in parks; duplexes	↓
Very Low (Less than 25% of MFI)	Less than \$12,725	42	12%	None	Apartments; new government assisted housing	

Source: Estimates by ECONorthwest

#### **STEP 4: ESTIMATE THE NUMBER OF ADDITIONAL NEEDED UNITS BY STRUCTURE TYPE**

Developing an estimate of the number of additional units needed by structure type presents a challenge since Coburg's housing market has been constrained by a lack of services. The *Coburg Crossroads Vision* proposes three housing goals, seven policies, and a number of actions. These policies can generally be summarized as envisioning new housing that is affordable and compatible with the community's character.

It is difficult, if not impossible, to develop a defensible forecast of the key variables that will affect housing choice in Coburg: age, income, and household size. Based on the analysis of PUMS data, however, a general trend becomes evident: households with lower incomes tend to have much higher incidence of renting, and lower cost units have a higher percentage of renters than higher cost units.

It is reasonable to assume that if more affordable housing were available, that some households with employees in Coburg would also choose to live in Coburg. Policies that encourage a range of housing types, densities, and price

<sup>20</sup> Specifically, Step 4, page 29 and the figure on page C-11.

ranges will provide local workers with more housing options. Such policies would help decrease (but not eliminate) the jobs-housing imbalance that currently exists in Coburg. Thus, prevailing wage rates of Coburg employers provide a good place to start when developing estimates of future housing need by type. Moreover, Coburg has stated that it desires to improve housing options for seniors, young adults, and people who work in the community.

ECO developed a simulation of housing need based on the proposed goals, policies, and actions described in the *Coburg Crossroads Vision*. A reasonable housing mix split for the planning period is 75% single-family and 25% multiple-family. The assumption is consistent with the current Coburg Comprehensive Plan which identifies a needed mix of 75% single-family and 25% multiple-family. This marks a considerable shift from the existing housing mix of more than 90% single-family housing types. History, however, is not a good indicator of future housing market performance in Coburg due to lack of infrastructure to accommodate higher density housing types. It is likely that a majority of the multiple-family housing built in the next 20 years will be in duplexes and smaller apartment complexes (structures with 10 or fewer units).

Table 4-11 shows the alternative forecast of needed housing units in Coburg for the period 2002-2025 and 2025-2050. The assumed residential mix is 63% single-family, 12% manufactured (mobile home), and 25% multiple family (5% condo/townhomes and 20% multifamily). The housing mix adjustments increase the number of needed units slightly because a higher percentage of households are allocated to multiple family housing types which are assumed to have a smaller household size.

**Table 4-11. Alternative forecast of needed housing units, Coburg, 2002-2025 and 2025-2050**

Housing Type	Needed Housing Mix	Needed Dwelling Units	
		2002-2025	2025-2050
<b>Single-family</b>			
Single-family detached	63%	563	1,368
Manufactured	12%	107	261
Subtotal	75%	670	1,629
<b>Multi-family</b>			
Condo/Townhomes	5%	45	109
Multifamily	20%	179	434
Subtotal	25%	223	543
<b>Total</b>	<b>100%</b>	<b>893</b>	<b>2,201</b>

Source: ECONorthwest

**STEP 5: DETERMINE THE NEEDED DENSITY RANGES FOR EACH PLAN DESIGNATION AND THE AVERAGE NEEDED NET DENSITY FOR ALL STRUCTURE TYPES**

Table 4-12 shows the alternative forecast of needed housing units in Coburg for the period 2002-2025 and 2025-2050. The assumed residential mix is 63% single-family, 12% manufactured (mobile home), and 25% multiple family (5% condo/townhomes and 20% multi-family). The alternative forecast indicates that Coburg will need about 128 net residential acres, or about 168 gross residential acres to accommodate new housing between 2002 and 2025. About 316 net residential acres and 408 gross residential acres would be required to accommodate new housing between 2002 and 2050. The alternative forecast increases average residential from 4.4 dwelling units per net acre to 7.0 dwelling units per net acre. This reduces land need by more than 38% over densities observed between 1998 and 2003.

**Table 4-12. Alternative forecast of needed housing units, Coburg, 2002-2025 and 2025-2050**

Housing Type	2002-2025					2002-2050				
	New DU	Percent	Net Acres	Density (DU/net res ac)	Gross Acres	New DU	Percent	Net Acres	Density (DU/net res ac)	Gross Acres
Single-family detached	563	63%	97.0	5.8	131.1	1,386	63%	239.9	5.8	318.6
Manufactured	107	12%	14.3	7.5	16.9	264	12%	35.2	7.5	41.4
Subtotal	670	75%	111.3	6.0	148.0	1,651	75%	275.1	6.0	360.0
<b>Multi-family</b>										
Condo/Townhomes	45	5%	5.6	8.0	7.0	110	5%	13.8	8.0	17.2
Multifamily	179	20%	11.2	16.0	12.5	440	20%	27.5	16.0	30.6
Subtotal	223	25%	16.7	13.3	19.5	550	25%	41.3	13.3	47.8
<b>Total</b>	<b>893</b>	<b>100%</b>	<b>128.1</b>	<b>7.0</b>	<b>167.5</b>	<b>2,201</b>	<b>100%</b>	<b>316.4</b>	<b>7.0</b>	<b>407.7</b>

Source: ECONorthwest

Coburg will have to modify its residential zoning system to meet the housing mix and density shown in Table 4-12. This is consistent with actions described in the *Coburg Crossroads Vision*. ECO recommends some variation of residential zoning system shown in Table 4-13.

**Table 4-13. Proposed residential zoning system, City of Coburg**

Zone	Housing types	Lot size range	Density range
Low density residential (R-L)	Single-family detached, Single-family attached, manufactured homes	6,000 sq. ft. - 10,000 sq. ft.	4-8 DU/net residential acre
Medium density residential (R-M)	Single-family attached, Single-family detached, manufactured homes, row houses, townhouses, condominiums	4,000 sq. ft. - 7,000 sq. ft.	6-10 DU/net residential acre
High density residential (R-H)	Row houses, townhouses, condominiums, apartments	2,500 sq. ft. - 5,000 sq. ft.	9-18 DU/net residential acre
Mixed-use residential (MUR)	A mixture of housing types on a single site: single-family, multi-family, manufactured	Variable	

The system proposed in Table 4-13 is purposely general; the City will have considerable work to do in developing the residential zoning system. ECO recommends the City modify the comprehensive plan to include plan designations that match the zoning districts.

Table 4-14 provides a preliminary allocation of housing units by the zoning districts described in Table 4-13. It also provides an estimate of the gross acres required in each zone to accommodate needed housing units. The acreages are based on the net density assumptions shown in Table 4-12 and a net-to-gross factor of 25% for single-family, 20% for condos/townhomes, 15% for manufactured, and 10% for multifamily. These assumptions show Coburg will need 168 gross residential acres between 2002 and 2025. The City will need 94 acres of low-density, 48 acres of medium density, 13 acres of high-density, and 13 acres of mixed-use residential lands.

**Table 4-14. Preliminary allocation of housing units by zone, 2002-2025**

Housing Type	Plan Designation								Total Gross	
	R-1 (low)		R-2 (medium)		R-3 (high)		Mixed			
	DU	Gross Ac	DU	Gross Ac	DU	Gross Ac	DU	Gross Ac	DU	Ac
<b>Single-family</b>										
Single-family detached	402	94	134	31	-	-	27	6	563	131
Manufactured	-	-	89	14	-	-	18	3	107	17
Subtotal	402	94	223	45	-	-	45	9	670	148
<b>Multi-family</b>										
Condo/Townhomes	-	-	18	3	18	3	9	1	45	7
Multi-family	-	-	-	-	143	10	36	2	179	12
Subtotal	-	-	18	3	161	13	45	4	223	19
<b>Total</b>	402	94	241	48	161	13	89	13	893	168

Source: ECONorthwest



## Chapter 5 **Economic Opportunities Analysis**

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This chapter is designed to meet the requirements of Goal 9 and Oregon Administrative Rule (OAR) 660-009 that implements Goal 9. Goal 9 calls for “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.” OAR 660-009-0015 (4) calls for an assessment of community economic development potential that estimates the types and amounts of industrial and commercial development likely to occur in the planning area. This assessment must be based on the following components:

- a review of national, state, and local economic trends to identify the categories of industrial and commercial uses that can reasonably be expected to locate in the planning area,
- site requirements for industrial and commercial uses that might expand or locate in the planning area,
- a survey of the expansion plans of major employers, and
- an inventory of buildable land and availability of public services.

The assessment of community economic development potential must also consider the planning area's economic advantages and disadvantages of attracting new or expanded development. Relevant economic advantages and disadvantages include:

- location relative to markets,
- availability of key transportation facilities and other public services,
- labor market factors,
- materials and energy availability and cost,
- necessary support services,
- pollution control requirements, and
- educational and training programs.

OAR 660-009-0025 requires plans to address the long-term supply of land (20 years), short-term supply of serviceable sites (5 years), and sites for uses with special siting requirements. This requirement necessitates the analysis in this chapter to take a 20-year perspective.

## ECONOMIC CONDITIONS IN COBURG

Table 5-1 shows population has grown faster in Coburn than in Lane County or Oregon as a whole over the 1980–2000 period. In the 1980s Coburg grew at an average annual rate of 0.9% compared to 0.3% in Lane County and 0.8% in Oregon. In the 1990s Coburg grew at an average annual rate of 2.4% compared to 1.3% in Lane County and 1.9% in Oregon. Despite growing at a faster rate, population in Coburg has remained only 0.3% of population in Lane County over the 1980–2000 period.

**Table 5-1. Population in Oregon, Lane County, and Coburg, 1980, 1990, and 2000**

	1980	1990	2000	AAGR	
				1980-1990	1990-2000
Oregon	2,633,156	2,842,321	3,421,399	0.8%	1.9%
Lane County	275,226	282,912	322,959	0.3%	1.3%
Coburg	699	763	969	0.9%	2.4%
% of Lane Co.	0.3%	0.3%	0.3%	n/a	n/a

Source: Population Research Center, Portland State University. 2001 and 1992. *Oregon Population Report*. Average Annual Growth Rate (AAGR) and percent of Lane County calculated by ECONorthwest.

Table 5-2 shows the level of covered employment, payroll, and average pay per employee in Oregon, Lane County, and Coburg<sup>21</sup> in 1997 and 2002. This table shows that total employment and payroll in Coburg has grown at a substantially higher rate than in Oregon or Lane County over the 1997–2002 period. The rapid growth has caused Coburg’s share of Lane County employment to grow from 1.2% in 1997 to 2.2% in 2002, and Coburg’s share of Lane County payroll to grow from 1.3% in 1997 to 2.4% in 2000. Average payroll per employee in Coburg is higher than the Lane County average but lower than the State average.

**Table 5-2. Total covered employment, payroll (in millions), and average pay per employee in Oregon, Lane County, and Coburg, 1997 and 2002 (2002 dollars)**

	1997			2002			Avg. Annual Growth Rate		
	Emp	Payroll	Pay/Emp	Emp	Payroll	Pay/Emp	Emp	Payroll	Pay/Emp
Oregon	1,522,053	\$46,994	\$30,875	1,573,083	\$52,989	\$33,685	0.7%	2.4%	1.8%
Lane County	131,712	\$3,596	\$27,299	137,868	\$4,058	\$29,437	0.9%	2.5%	1.5%
Coburg	1,614	\$48	\$29,685	2,988	\$96	\$32,248	13.1%	15.0%	1.7%
% of Lane Co.	1.2%	1.3%	108.7%	2.2%	2.4%	109.5%	n/a	n/a	n/a

Source: Oregon Employment Department. 1997 and 2002. *Covered Employment & Payrolls by Industry & County*. Employment and payroll in Coburg estimated by ECONorthwest from ES-202 data provided by the Oregon Employment Department. Average annual growth rates and percent of Lane County calculated by ECONorthwest.

Table 5-3 shows employment and payroll in Coburg by sector. The data in Table 5-3 is from confidential ES-202 data on individual employers from the Oregon Employment Department. Firms in Coburg were identified by zip code and street address. Requirements to maintain the confidentiality of

<sup>21</sup> Employment data for Coburg includes employers within the Coburg UGB as well as those immediately outside the UGB, roughly within 1/4-mile of the UGB or businesses along Coburg road between the UGB and the McKenzie River.

individual firms prevents reporting employment for sectors or industries where there are fewer than three firms or where a single firm accounts for 85% or more of the sector/industry employment. These requirements apply to several sectors in Coburg, which are summed in the “Other” sector category in Table 5-3.

**Table 5-3. Covered employment and payroll (in millions) by sector in Coburg, 1997 and 2002 (2002 dollars)**

Sector	1997			2002			Avg. Annual Growth Rate		
	Emp	Payroll	Pay/Emp	Emp	Payroll	Pay/Emp	Emp	Payroll	Pay/Emp
Construction	148	\$5.4	\$36,788	151	\$6.2	\$40,953	0.4%	2.6%	2.2%
Wholesale Trade	181	\$7.5	\$41,357	195	\$7.6	\$39,226	1.5%	0.4%	-1.1%
Retail Trade	134	\$2.2	\$16,461	213	\$4.0	\$18,705	9.7%	12.6%	2.6%
F.I.R.E.	79	\$1.7	\$20,904	99	\$2.3	\$22,827	4.6%	6.5%	1.8%
Services	76	\$1.8	\$24,136	105	\$2.3	\$22,318	6.7%	5.0%	-1.6%
Other	996	\$29.3	\$29,408	2,225	\$73.9	\$33,229	17.4%	20.3%	2.5%
<b>Total</b>	<b>1,614</b>	<b>\$47.9</b>	<b>\$29,685</b>	<b>2,988</b>	<b>\$96.4</b>	<b>\$32,248</b>	<b>13.1%</b>	<b>15.0%</b>	<b>1.7%</b>
<b>Percent of total</b>									
Construction	9%	11%	124%	5%	6%	127%	n/a	n/a	n/a
Wholesale Trade	11%	16%	139%	7%	8%	122%	n/a	n/a	n/a
Retail Trade	8%	5%	55%	7%	4%	58%	n/a	n/a	n/a
F.I.R.E.	5%	3%	70%	3%	2%	71%	n/a	n/a	n/a
Services	5%	4%	81%	4%	2%	69%	n/a	n/a	n/a
Other	62%	61%	99%	74%	77%	103%	n/a	n/a	n/a
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>n/a</b>	<b>n/a</b>	<b>n/a</b>

Source: Employment and payroll in Coburg estimated by ECONorthwest from ES-202 data provided by the Oregon Employment Department. Average annual growth rates and percent of total calculated by ECONorthwest.

Note: F.I.R.E. is Finance, Insurance, and Real Estate.

Table 5-3 shows that the bulk of Coburg’s employment and employment growth is in the “Other” category, which represents sectors with few firms or with a single firm that accounts for a large share of that sector’s employment. This implies that Coburg’s employment is dominated by a few large firms, an implication that is confirmed by examination of the confidential data for individual employers. The “Other” category includes Coburg’s two largest employers, Monaco Coach and Marathon Coach, which manufacture recreational vehicles. These firms are in the Transportation Equipment industry. The “Other” category also includes firms in the Livestock Production, Trucking & Warehousing, Lumber & Wood Products, Local Passenger Transit, and other industries.

Data in Table 5-3 shows that industries in the “Other” sector added 1,229 jobs between 1997 and 2005, or 89% of total employment growth in Coburg. Employment and payroll in the “Other” sector also grew at a faster rate than other sectors and total employment in Coburg. Outside of the “Other” sector, the Retail Trade sector had the most employment growth and fastest employment growth rate, adding 79 jobs (6% of total employment) and growing at an average annual rate of 9.7%. Most of the employment in the Retail Trade sector is in the Auto Dealers & Service and Eating & Drinking Places industries.

The Construction and Wholesale Trade sectors have above-average levels of annual payroll per employee. Payroll per employee in the “Other” sector is close to the Coburg average, which is not surprising because this sector accounts for such a large share of Coburg’s employment. Annual payroll per employee in the Retail Trade, F.I.R.E., and Services sectors is roughly \$10,000 to \$14,000 below the Coburg average in 2002. Table 5-3 shows that payroll per employee grew in every sector between 1997 and 2003 except Wholesale Trade and Services (in constant 2002 dollars).

Overall, confidential data provided by the Oregon Employment Department shows that employment in Coburg is dominated by the following activities:

- Recreational vehicle manufacturing
- Heavy equipment sales and service
- Construction contractors
- Trucking
- Automobile and truck service stations

In addition to these dominant activities, Coburg has numerous small firms that serve local residents and visitors, such as restaurants, a food store, hotels, real estate offices, and churches. Coburg also has several small firms that serve customers in metropolitan Eugene-Springfield or statewide. Examples include Manley Administrative Services, which administers flexible spending accounts for employers, and Experience Oregon, which operates charter and tour buses in Oregon.

## **OVERVIEW OF ECONOMIC CONDITIONS IN OREGON AND LANE COUNTY**

### **POPULATION GROWTH**

The Willamette Valley has been the center of growth in Oregon. The population growth rate in the Willamette Valley has exceeded that of the state in every decade of the 20<sup>th</sup> century except the 1970s, when population in Southern and Central Oregon grew at a rapid rate. About 2.4 million people or 70% of Oregon’s population in 2000 was located in the Willamette Valley, which contains only 14% of the state’s land area. Most of the Willamette Valley’s population is in the metropolitan areas of Portland, Salem, and Eugene-Springfield.<sup>22</sup>

The average annual population growth rate in Lane County exceeded the Oregon average in the 1940s through 1970s, but slowed to rates lower than the Oregon average in the 1980s and 1990s. Census data shows that Lane

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<sup>22</sup> The Willamette Valley is composed of Benton, Clackamas, Lane, Linn, Marion, Multnomah, Polk, Washington, and Yamhill counties.

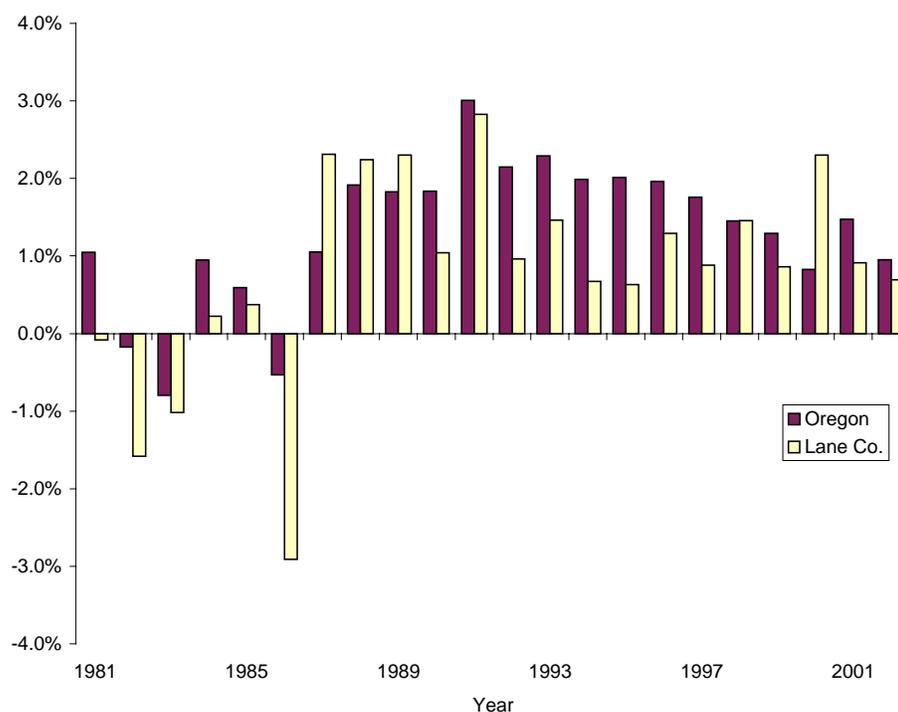
County's share of Oregon population peaked in 1980 at 10.5% and has since declined to 9.4% in 2000.

Population growth in every Oregon region slowed in the 1980s, primarily because of out-migration prompted by poor economic conditions early in the decade. Oregon's population growth regained momentum in 1988, growing at annual rates of 1.3%–3.0% between 1988 and 1999. While the Willamette Valley received most of the population growth during this period (72%), Central Oregon had the fastest annual population growth rates.

Population growth for Oregon slowed to 0.8% in 2000, the lowest rate since 1987. Net migration into Oregon dropped from a peak of 67,700 in 1991 to 10,700 in 2000. The reasons most often cited for this slowing of population growth are the recovery of the California economy, the combination of a high cost of living (especially housing) and low wages in Oregon, and a perceived decline in the quality of Oregon's schools. Population growth in Oregon rebounded in 2001 and 2002, with annual population growth of 1.0% to 1.5% and annual net migration of 17,600 to 29,400.

Lane County experienced low or negative population growth rates in the early 1980s, but annual population growth rebounded to exceed the Oregon average between 1987 and 1989. Population growth in Lane County has been positive since 1989 but at rates lower than the Oregon average, except in 2000 when Lane County grew by 2.3% while Oregon grew by 0.8%. In general, population growth in Lane County has been more cyclical than for Oregon as a whole. Figure 5-1 shows the annual population growth rate in Oregon and Lane County between 1981 and 2002.

**Figure 5-1. Annual population growth rate in Oregon and Lane County, 1981–2002**



Source: Portland State University, Population Research Center. Annual. Oregon Population Report. Annual growth rates calculated by ECONorthwest.

Between 1990 and 1999, over 70% of Oregon’s and 73% of Lane County’s total population growth was from net migration (in-migration minus out-migration), with the remaining 27% to 30% from natural increase (births minus deaths). Migrants to Oregon tend to have the same characteristics as existing residents, with some differences. Recent studies<sup>23</sup> have found that recent in-migrants to Oregon are, on average, younger and more educated, and are more likely to hold professional or managerial jobs, compared to Oregon’s existing population. The race and ethnicity of in-migrants generally mirrors Oregon’s established pattern, with one exception: Hispanics make up more than 7% of in-migrants but only 3% of the state’s population. The number-one reason cited by in-migrants for coming to Oregon was family, followed by employment, quality of life, and retirement.

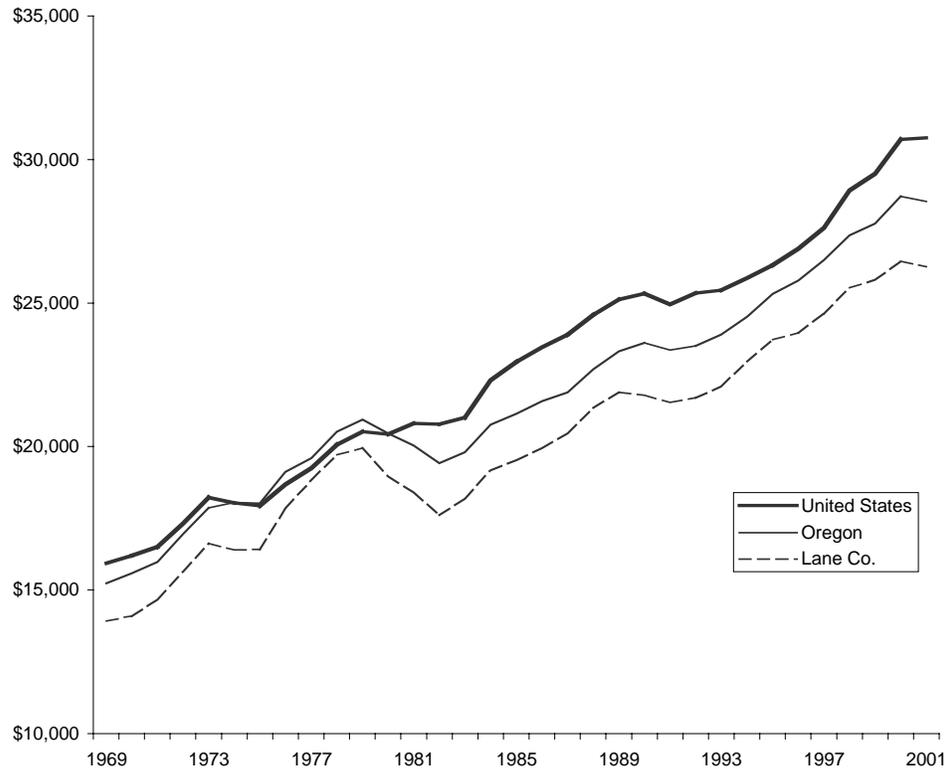
## PERSONAL INCOME

Figure 5-2 shows the level of per capita income in the United States, Oregon, and Lane County over the 1969–2001 period, in real inflated-adjusted dollars. Real per capita income has experienced relatively steady growth since 1969, with the exception of the early-1980s recession in Oregon and Lane County. Figure 5-2 shows that real per capita income in Lane

<sup>23</sup> LeBre, Jon. 1999. "Characteristics of Oregon's In-Migrants: A Sneak Preview." *Oregon Labor Trends*. February. Judson, Dr. Dean H. 1994. *The Oregon In-Migration Survey*. Salem: State of Oregon, Employment Department.

County has historically lagged behind the Oregon and U.S. average. As a percent of the U.S. average, real per capita incomes peaked in 1977–1979 period, with Oregon at 102% and Lane County at 98% of the U.S. average. Per capita incomes reached a low in the mid-1980s, with Oregon at 92% and Lane County at 85% of the U.S. average. Per capita incomes peaked in 1995 with Oregon at 96% and Lane County at 90% of the U.S. average, but income has since fallen to 93% of the U.S. average in Oregon and 85% of the U.S. average in Lane County.

**Figure 5-2. Per capita income in the U.S., Oregon, and Lane County, 1969–2001 (in 2002 dollars)**



Source: U.S. Department of Commerce, Bureau of Economic Analysis. 2003. Regional Economic Accounts. <http://www.bea.doc.gov/bea/regional/statelocal.htm> Converted to 2002 dollars by ECONorthwest, using the chain-type price index for the Personal Consumption Expenditure component of Gross Domestic Product, as reported in the 2003 *Economic Report of the President*, Table B-7.

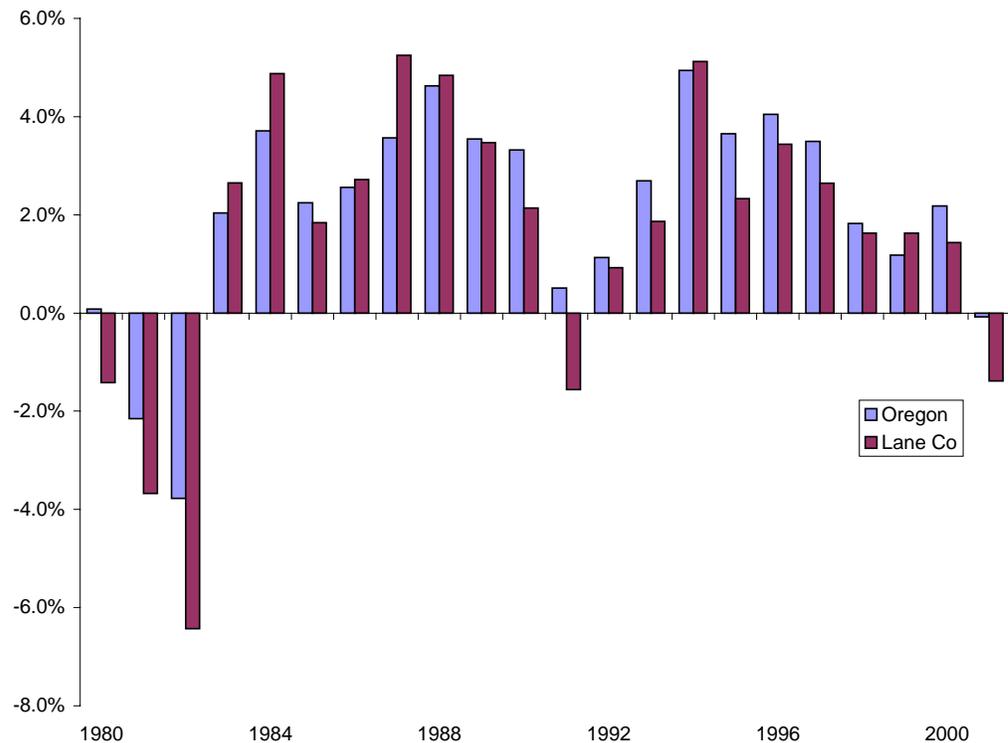
## EMPLOYMENT

Employment growth has generally followed the trend of population growth, but employment growth varies more because employment is more closely tied to economic conditions. As for population, over 70% of Oregon’s employment is located in the Willamette Valley. The Valley also experienced the largest loss of employment in the recession of the early 1980s.

Since 1969, employment in Oregon has grown most rapidly in the 1970s, with annual employment growth above 5% in 1972–73 and 1977–78. Annual employment growth in Oregon was slow or negative in the early 1980s but

peaked at 4.6% per year in 1988, declined in the early 1990s and peaked at 4.9% in 1994. Annual employment growth in Oregon has declined since 1994, falling to -0.1% in 2001. As with population, employment growth in Lane County tends to be more cyclical than employment growth in Oregon as a whole. Annual employment growth in Oregon and Lane County is shown in Figure 5-3 for the 1980–2001 period. Figure 5-3 shows that Lane County lost a larger share of employment than Oregon in the recessions of the early 1980s, 1990s, and in 2001. Lane County also grew at a faster rate than Oregon during the recovery of the mid-1980s and mid-1990s.

**Figure 5-3. Annual nonfarm employment growth in Oregon and Lane County, 1980–2001**



Source: U.S. Department of Commerce, Bureau of Economic Analysis. 2003. Regional Economic Accounts. <http://www.bea.doc.gov/bea/regional/statelocal.htm> Annual growth rates calculated by ECONorthwest.

The composition of employment in Oregon has changed since 1969. Employment growth has been led by the Services and Retail Trade sectors.<sup>24</sup> The share of total employment in these sectors increased from 35% to 49% between 1969 and 1995. Slow growth in Manufacturing caused its share of total employment to decline from 22% to 13% over this period, while other sectors grew at rates close to the statewide average. Employment in Lane County showed a similar pattern, with employment in Manufacturing declining from 25% to 14% of total employment between 1969 and 2001,

<sup>24</sup> This chapter will make frequent use of the terms *sector* and *industry*. *Sectors* are groups of *industries*, as defined in the Standard Industrial Classification system used for economic statistics. For example, the Manufacturing sector contains the Lumber & Wood Products, Primary Metal, and other manufacturing industries.

while the share in Services and Retail Trade increased from 35% to 50% of total employment in the same period.<sup>25</sup>

In the last 20 years Oregon's economy has made a transition away from reliance on traditional resource-extraction industries, with the growth of high-tech manufacturing, services, and trade. A significant indicator of this transition is the decline of employment in the Lumber & Wood Products industry and the concurrent growth of employment in high-technology manufacturing industries (Industrial Machinery, Electronic Equipment, and Instruments). Employment in Lumber & Wood Products has declined from its 1979 peak, and employment in high-tech industries surpassed that in Lumber & Wood Products 1995.

While this transition 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, primarily due to dependence on the timber industry. Oregon ranked 35<sup>th</sup> in diversity (1<sup>st</sup> = most diversified) based on Gross State Product data for 1963–1986, and 32<sup>nd</sup> based on data for the 1977–1996 period. While the composition of Oregon's employment has shifted, it is still heavily dependent on several industries. Oregon's diversity ranking remains low due to disproportionately large timber, high tech, and agricultural industries. Relatively low economic diversity increases the risk of economic volatility as measured by changes in output or employment. For example, Oregon enjoyed strong employment growth in high-tech manufacturing in the 1990s, but these firms also laid off many employees or left Oregon altogether during the recent recession.<sup>26</sup>

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.

Changing economic conditions in Oregon have not only been affected by national and international trends, but also by government action in Oregon. State policy made a concerted effort to attract industries with tax policy (e.g., no unitary tax, which would tax world-wide corporate income of businesses operating in Oregon), changes in corporation codes, reforms to reduce the costs of workers' compensation, investments in infrastructure, and other incentives (e.g., enterprise zones and the Strategic Investment Program, which attempts to stimulate capital-intensive industries through property tax abatement). The State has encouraged international trade and

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<sup>25</sup> Source: U.S. Department of Commerce, Bureau of Economic Analysis. 2003. Regional Economic Accounts. <http://www.bea.doc.gov/bea/regional/statelocal.htm>. Share of total employment by sector calculated by ECONorthwest.

<sup>26</sup> LeBre, Jon. 1999. "Diversification and the Oregon Economy: An Update." *Oregon Labor Trends*. February.

investments with missions and offices in Japan, Taiwan, and other Pacific Rim countries. And State policy on land use and environmental quality aim at preserving the natural and cultural amenities that make Oregon attractive to its current and potential residents and businesses.

## OUTLOOK FOR ECONOMIC CONDITIONS

### LONG-TERM NATIONAL TRENDS

Economic development in Lane County and Coburg over the next twenty years will occur in the context of long-term national trends. The most important of these trends includes:

- Continued westward migration of the U.S. population, and the increasing role of amenities and other non-wage factors as factors in the location decisions of households and firms.
- Increasing importance and growth in Pacific Rim trade.
- The growing importance of education as a determinant of wages and household income.
- The decline of employment in resource-intensive industries and the increase in employment in service-oriented and high-tech manufacturing sectors of the economy.
- The increasing integration of non-metropolitan and metropolitan areas.<sup>27</sup>

Short-term trends will also affect economic growth in Lane County and Coburg, but these trends are difficult to predict. At times these trends may run counter to the long-term trends described above. An example is the current economic recession, with persistently high unemployment rates. Despite the current recession, the long-term expectation is for continued population and employment growth in Oregon, although current conditions have caused analysts to lower expected growth rates from their earlier forecasts.

### ECONOMIC OUTLOOK FOR OREGON

Oregon's economy is expected to follow a pattern of modest growth over the next two decades. The long-term population forecast by Oregon's Office of Economic Analysis predicts Oregon's population will grow at an annual average rate of 1.1% between 2000 and 2040.<sup>28</sup> At this rate of growth, Oregon

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<sup>27</sup> These trends are discussed in more detail in Niemi, Ernie and Whitelaw, Ed. 1997. *Assessing Economic Tradeoffs in Forest Management*. Portland: U.S. Forest Service Pacific Northwest Research Station. General Technical Report PNW-GTR-403. August.

<sup>28</sup> State of Oregon, Office of Economic Analysis. 2003. *Long-Term Population Forecast for Oregon and its Counties (DRAFT)*. January.

is expected to add almost one million people by 2020 and another million by 2040, growing from 3.4 million in 2000 to 5.3 million in 2040. 65% of this population growth, 1.2 million people, is expected to come from net migration into Oregon. This forecast is based on assumptions including continued growth in the national economy, strong in-migration, sustained construction activity, and continued growth in the high-tech manufacturing industries in Oregon.

Population growth rates are predicted to be relatively even across Oregon's regions, so the distribution of Oregon's population by region is not expected to shift substantially over the 40-year forecast period.

A review of historical population growth shows that Oregon's population has grown more rapidly than in the U.S. as a whole (with the exception of the recession of the 1980s), and this trend is expected to continue into the future. The current long-term projection of U.S. population shows it growing at an average annual rate of 0.8% between 2000 and 2040.<sup>29</sup>

Historical population data also shows that actual year-to-year population growth is likely to have much more variation than the steady growth rates used in the State's long-term forecast. This result is typical of forecasts that focus on predicting average growth rates over a long period rather than year-to-year changes. Oregon will likely have short periods of rapid and slow population growth in the future. Barring a prolonged recession or other unforeseen economic conditions, Oregon's long-term population growth rate should average out to the 1.1% rate anticipated by the long-term forecast.

The Bureau of Economic Analysis projects per capita income in Oregon will increase from \$20,500 in 1993 to \$26,200 in 2015 (in constant 1996 dollars).<sup>30</sup> Per capita income in the United States is projected to increase at the same rate as in Oregon, so the state's per capita income is expected to remain at about 94% of the U.S. average.

The State of Oregon published a long-term forecast of total employment by county in 1997. This forecast shows that the Willamette Valley is expected to lead the state in employment growth between 2000 and 2040, adding over 500,000 jobs or 77% of employment growth statewide.<sup>31</sup>

The Oregon Employment Department publishes a 10-year forecast of employment growth by industry in Oregon and Workforce Analysis Regions.

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<sup>29</sup> U.S. Department of Commerce, Bureau of the Census. 2000. *Annual Projections of the Total Resident Population as of July 1: Middle, Lowest, Highest, and Zero International Migration Series, 1999 to 2100*. <http://www.census.gov/population/projections/nation/summary/np-t1.txt>

<sup>30</sup> U.S. Department of Commerce, Bureau of Economic Analysis. 1995. *Projections of Personal Income, Employment, and Population, for States, Metropolitan Statistical Areas, and BEA Economic Areas, 1993–2045*. Washington, DC: BEA Regional Economic Analysis Division (202 606-5341).

<sup>31</sup> State of Oregon, Office of Economic Analysis. 1997. *Long-Term Population and Employment Forecasts for Oregon*. Employment growth in the Willamette Valley calculated by ECONorthwest.

The latest forecast for employment in the 2002–2012 period shows that Services and Retail Trade sectors are expected to lead employment growth in Oregon—together these sectors are expected to add almost 140,000 jobs or 65% of total employment growth in Oregon over the ten-year period.

Table 5-4 shows the industries that are expected to have the largest amounts of employment growth and largest percentage employment growth in Oregon during the 2002–2012 period, from the Oregon Employment Department forecast. Three of the industries with the largest employment growth are in the Services sector; Health Services, Business Services, and Social Services. Each of these industries are also expected to have some of the largest percentage increase in employment in Oregon over the 2002–2012 period, along with two additional Service sector industries: Private Education and Engineering & Management Services.<sup>32</sup> Outside of the Services sector, substantial employment growth is expected in Local Government, Eating & Drinking Places, and Wholesale Trade over the 2002–2012 period. Of industries with the largest percentage growth in Table 5-4, only Real Estate is outside of the Services sector.

**Table 5-4: Leading Growth Industries in Oregon, 2002–2012**

Industry	2002	2012	2002-2012	
			Increase	% Increase
<b>Largest Increase</b>				
Health Services	118,000	149,000	31,000	26.3%
Business Services	95,400	119,600	24,200	25.4%
Local Government	182,300	197,800	15,500	8.5%
Eating & Drinking Places	108,800	124,200	15,400	14.2%
Wholesale Trade	85,200	99,800	14,600	17.1%
Social Services	49,200	59,600	10,400	21.1%
<b>Largest % Increase</b>				
Health Services	118,000	149,000	31,000	26.3%
Business Services	95,400	119,600	24,200	25.4%
Private Education	23,900	29,800	5,900	24.7%
Social Services	49,200	59,600	10,400	21.1%
Engineering & Management Services	29,500	35,600	6,100	20.7%
Real Estate	31,300	37,200	5,900	18.8%

Source: State of Oregon, Employment Department. July 2003. *Employment Projections By Industry*.

The Manufacturing sector is expected to contribute only 5% of Oregon’s employment growth over the 2002–2012 period. Leading manufacturing industries, in terms of employment growth, are Electronic & Electrical Equipment (5,500), Transportation Equipment (2,700), and Printing & Publishing (2,400). Several industries in Oregon’s Manufacturing sector are expected to lose jobs over the 2002-2012 period, including Lumber & Wood Products (-1,500), Food & Kindred Products (-1,200), and Primary Metals

<sup>32</sup> Private Education includes private K-12 schools as well as firm providing tutors for students, employee training, and similar services. Engineering & Management Services includes engineers, architects, accounting, research, public relations, facility support, and similar services.

(-800). Outside of Manufacturing, the only industry expected to lose employment over the 2002–2012 period is Railroad Transportation (-800).

## ECONOMIC OUTLOOK FOR LANE COUNTY

Population in Lane County is expected to grow more slowly than population for Oregon as a whole. The long-term population forecast by Oregon's Office of Economic Analysis predicts Lane County's population will grow at an annual average rate of 0.9% between 2000 and 2040, compared to a rate of 1.1% for Oregon over the same period.<sup>33</sup> At this rate of growth, Lane County is expected to add almost 140,000 people by 2040, growing from 325,000 people in 2000 to 465,000 in 2040. As for Oregon, a substantial share of this population growth is expected to come from net migration into Lane County.

The State forecast for Lane County has been allocated to local jurisdictions by the Lane Council of Governments. Population in Lane County is expected to grow at a faster rate in urban areas of the County, with the result that the share of the County's population in every urban area is expected to increase except in Dunes City, Lowell, Oakridge, and Westfir, which are expected to have steady or declining shares of the County's total population. The share of population in Eugene/Springfield is expected to increase from 69% of the County total in 2000 to 71% of the County total in 2030. The share of the County's population in Coburg is expected to increase from 0.3% to 0.7% in the same period. The share of the County's population in unincorporated areas is expected to decrease from 20% in 2000 to 14% in 2030.<sup>34</sup>

The State of Oregon published a long-term forecast of total employment by county in 1997. This forecast shows that employment in Lane County is expected to grow at an annual average rate of 0.9% between 2000 and 2040, the same rate as forecast for Oregon over the same period. Lane County is expected to add about 62,000 jobs or 9.5% of employment growth in Oregon over the 2000 to 2040 period.<sup>35</sup>

The Oregon Employment Department publishes a 10-year forecast of employment growth in Oregon and Workforce Analysis Regions. Table 5-5 shows forecast employment growth by sector and industry in Lane County over the 2002–2012 period. This forecast shows that the Services and Retail Trade sectors are expected to lead employment growth in Lane County, together adding 12,000 jobs or almost 70% of total employment growth in Lane County over the ten-year period. Most of the employment growth in

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<sup>33</sup> State of Oregon, Office of Economic Analysis. 2003. *Long-Term Population Forecast for Oregon and its Counties (DRAFT)*. January.

<sup>34</sup> Lane Council of Governments. 2003. Preliminary Coordinated UGB Population for Cities in Lane County and Shares of Total County Population.

<sup>35</sup> State of Oregon, Office of Economic Analysis. 1997. *Long-Term Population and Employment Forecasts for Oregon*. Employment growth in the Willamette Valley calculated by ECONorthwest.

Manufacturing is expected in the “Other Durable Goods” industries, which includes the Transportation Equipment and Electronic Equipment industries.

**Table 5-5. Nonfarm payroll employment growth in Lane County, 2002–2012**

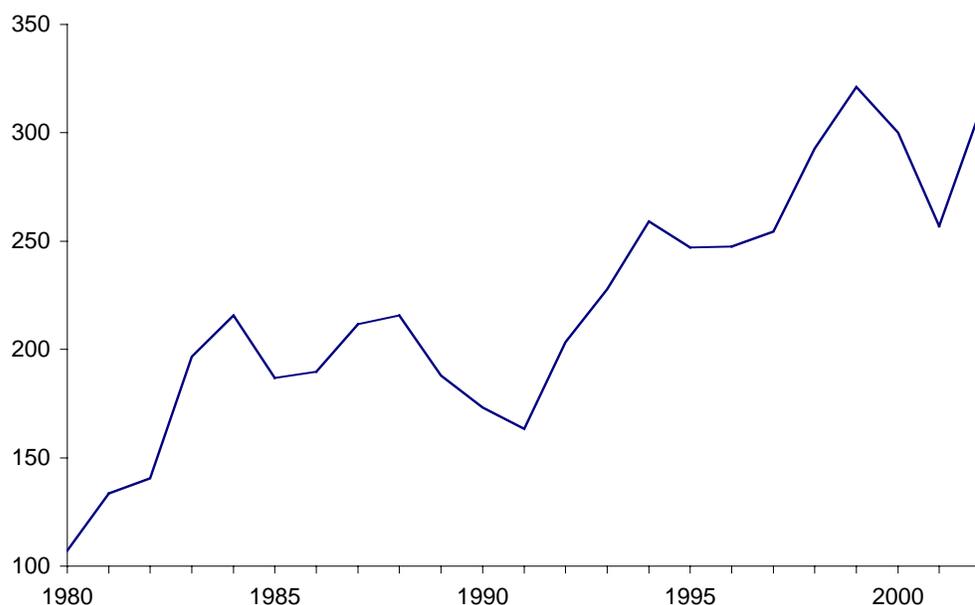
Sector/Industry	2002	2012	Change	% Change
Mining & Quarrying	200	200	0	0.0%
Construction	6,400	7,000	600	9.4%
Manufacturing	21,000	21,700	700	3.3%
Lumber & Wood	6,600	6,400	-200	-3.0%
Other Durable Goods	9,300	9,900	600	6.5%
Food Products	1,300	1,300	0	0.0%
Other Nondurable Goods	3,800	4,100	300	7.9%
Transportation & Public Utilities	4,000	4,500	500	12.5%
Transportation	2,900	3,300	400	13.8%
Communication & Utilities	1,100	1,200	100	9.1%
Wholesale Trade	5,900	6,800	900	15.3%
Retail Trade	29,000	32,400	3,400	11.7%
General Merchandise	4,300	4,800	500	11.6%
Food Stores	4,100	4,600	500	12.2%
Eating & Drinking Places	10,300	11,500	1,200	11.7%
Other Retail	10,300	11,500	1,200	11.7%
Finance, Insurance, & Real Estate	7,300	8,400	1,100	15.1%
Services	41,300	49,900	8,600	20.8%
Business & Professional Services	11,200	13,500	2,300	20.5%
Health Services	12,700	16,300	3,600	28.3%
Other Services	17,400	20,100	2,700	15.5%
Government	26,600	28,300	1,700	6.4%
Federal	1,900	2,000	100	5.3%
State	9,400	10,100	700	7.4%
Local	15,300	16,200	900	5.9%
<b>Total</b>	<b>141,700</b>	<b>159,200</b>	<b>17,500</b>	<b>12.4%</b>

Source: State of Oregon, Employment Department. July 2003. *Employment Projections By Industry*.

## RV INDUSTRY OUTLOOK

The RV industry is the major employer in Coburg. Trends in this industry could have a significant effect on the future level of employment in Coburg. Figure 5-4 shows total RV shipments in the United States over the 1980–2002 period. Figure 5-3 clearly shows the upward trend in RV shipments over the last 22 years; shipments have increased at an average rate of 5% per year between 1980 and 2002. While there has been an overall upward trend, RV shipments show some year-to-year declines due to economic conditions. Declines in RV shipments over the last 22 years have been attributed to high interest rates, high gas prices, and overall economic conditions.

**Figure 5-4. Annual RV shipments (in thousands) in the United States, 1980–2002**



Source: Recreation Vehicle Industry Association, [www.rvia.org](http://www.rvia.org).

The outlook for the RV industry is for continued growth in the number and value of RVs shipped in the United States. A recent study<sup>36</sup> by Crowe Capital Markets LLC, a Chicago-based investment bank, found the following trends and outlook for growth in the RV industry:

- After declines in shipments and retail value in 2000 and 2001, the RV market began to recover in 2002. This trend is expected to continue in 2003 as positive underlying economic conditions fuel demand.
- Demographic trends are expected to generate significant growth in the RV industry. As the baby boomers continue to age, they will have increasing levels of disposable income and free time. This group currently has the highest rate of RV ownership of any group, and this is expected to increase as a larger share of this age group reaches retirement age.
- There has been consolidation of manufacturers in the RV industry over the last 10 years, and this is expected to continue as larger manufacturers gain market share through internal expansion and acquisition of smaller firms.
- The trend in RV sales has favored the high end of the market. The market share for Class A motorhomes, which are the largest and most expensive of the three motorhome classes, has increased from 56% in

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<sup>36</sup> As reported in *RV News*, 28(8), March 2003. [www.rv-news.com](http://www.rv-news.com)

1991 to 68% in 2002. The market share for higher-priced travel trailers and fifth-wheel trailers has increased from 64% in 1991 to 75% in 2002. These trends suggest a significant amount of “trading up” by RV consumers.

- Low interest rates and gas prices have played a major role in recent growth of the RV industry, stimulating RV purchases by reducing the cost of financing a vehicle and the expected cost of travel.
- Many Americans are turning to RVs as a lower-cost and safer alternative to other types of vacations.
- The average price of motorhomes increased from \$51,200 in 1991 to \$106,800 in 2002, an average increase of 7.6% per year. The average price of towable RVs has been more constant, increasing from \$11,100 in 1991 to \$16,100 in 2002 or an average increase of 3.8% per year.

While the expectation is for continued growth in the RV industry, an examination of past trends and the industry outlook shows that the RV industry is vulnerable to changes in economic conditions. Increase interest rates, increased gas prices, or poor economic conditions could lead to a decrease in the level of RV shipments.

## FACTORS AFFECTING ECONOMIC DEVELOPMENT IN COBURG

Each place has access to different combinations of productive factors: land (and natural resources), labor (including technological expertise), and capital (investments in infrastructure, technology, and public services). While all places have these factors to some degree, the mix and condition of these factors vary by location. The mix and condition of productive factors may allow firms in one area to produce goods and services more cheaply than firms in other areas. Location also affects transportation costs to markets for goods and services, which may allow firms in one area to generate more revenue or profits per unit than firms in other locations.

The mix of factors of production and access to markets in a location relative to other locations is referred to as a location’s *comparative advantage*. By affecting the cost of production and potential revenue, comparative advantages affect the pattern of economic development in an area relative to other areas. The administrative rule for Goal 9 recognizes this by requiring jurisdictions to include an analysis of economic advantages and disadvantages in an economic opportunities analysis.<sup>37</sup>

The forecasts for population and employment growth in Oregon and Lane County presented earlier in this chapter implicitly considered the comparative advantages of the State and County when projecting the rate

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<sup>37</sup> OAR 660-009-0015(4).

and composition of growth. This section focuses on the comparative advantages of Coburg relative to Lane County and Oregon.

## **LOCATION**

Coburg's proximity to Eugene-Springfield and the I-5 corridor are key comparative advantages that will affect economic development in Coburg. Proximity to Eugene-Springfield allows firms in Coburg to have access to many of the advantages of locating in a larger city, such as:

- A large potential customer base and a skilled workforce.
- Suppliers of intermediate production goods, parts, and raw materials.
- Distributors of finished products to regional, national, and international markets.
- Specialized support services such as marketing, finance, accountants, and attorneys.

Coburg's location on I-5 allows firms to easily access these advantages. In addition, being on the I-5 corridor allows firms in Coburg to have relatively easy and quick access to potential customers and suppliers in the Willamette Valley, west coast, and national markets. This advantage is particularly important for firms that ship goods by truck, rely on capturing passing traffic, or require close proximity to customers.

Coburg's proximity to Eugene-Springfield allows it to have many of the advantages of a larger metropolitan area without many of the disadvantages, such as higher crime rates, sprawl, traffic congestion, high taxes, and red tape. Coburg is an attractive location for firms that desire a small-town atmosphere but require the advantages of a larger city. The following section discusses quality of life in Coburg in more detail.

## **QUALITY OF LIFE**

Coburg's small-town character, coupled with its proximity to Eugene-Springfield and I-5, is an important comparative advantage. As stated above, Coburg is an attractive location for firms that desire a small-town atmosphere but require the advantages of a larger city. This is particularly true for firms that are concerned about the quality of life for their employees and want to give employees options—locating in Coburg could allow employees to live in rural, small town, suburban, or urban locations. The small-town character of Coburg also makes it an attractive location for people to live, particularly for families. A desirable living environment will allow Coburg to attract skilled workers, some of whom will bring their jobs with them. Population growth in general will increase the labor force immediately available in Coburg, making it more attractive to firms that may locate there.

The small-town atmosphere in Coburg is created by more than just its small size. Aspects of this character include its traditional downtown with quaint structures, low-density residential neighborhoods, and proximity to farm land and open space. Coburg can maintain many of the qualities of a small town even while growing, but the City will need to adopt policies and take actions to protect and enhance these qualities.

While Coburg has many desirable qualities, one aspect of quality of life that is lacking is retail services. Coburg currently lacks many retail options for residents, particularly a full-service grocery store and pharmacy. Coburg's preferred population growth alternative was chosen in part because stakeholders felt that the level of population growth would support provision of basic goods and services including a grocery and pharmacy. Another aspect of quality of life that is lacking in Coburg is schools. Coburg has an elementary school with only 133 students in 2000. Declining enrollment could cause the Eugene 4J School District to close this school. The preferred population growth alternative selected by Coburg assumes that the City will adopt policies to target housing for families, in part to help maintain enrollment at Coburg Elementary. Coburg does not have a middle or high school, and probably will not have the enrollment to support a middle school until after the twenty-year planning period considered in this report.

## BUILDABLE LAND

Chapter 3 presents detailed information on the supply of buildable land in Coburg. Table 5-6 summarizes the amount of buildable land in Coburg to accommodate employment growth. Buildable land in Table 5-6 includes vacant and partially vacant land.

**Table 5-6. Partially vacant and vacant lands in Commercial and Industrial plan designations, Coburg UGB, 2003**

Plan Designation	Partially Vacant		Vacant		Total	
	Acres	Percent	Acres	Percent	Acres	Percent
Central Business District	2.7	35%	2.4	6%	5.2	11%
Highway Commercial	0.0	0%	25.2	61%	25.2	51%
Light Industrial	5.0	65%	13.6	33%	18.6	38%
<b>Total</b>	<b>7.7</b>	<b>100%</b>	<b>41.2</b>	<b>100%</b>	<b>48.9</b>	<b>100%</b>

Source: ECONorthwest.

Table 5-6 shows that the City of Coburg currently has about 49 vacant non-residential acres. Not included in table 5-6 is land considered as underdeveloped (lands where the improvement value is less than the land value). Coburg has an additional 50 acres that could be considered underdeveloped. These lands may redevelop with more intensive uses, and expansion areas for existing firms that could accommodate up to 750 employees. The issue of how much redevelopment will occur on under-utilized lands is addressed in Chapter 6.

A final issue related to buildable lands is the location and serviceability of sites designated for commercial and industrial uses. Nearly all of the City's inventory of Highway Commercial land (24 of 25 acres) is in a single site near the I-5 interchange. The site is currently outside the City Limits.

With respect to lands designated for industrial uses, the largest vacant parcel is just over 6 acres. There is one parcel about three acres, and two parcels between 1 and 2 acres. Coburg has an additional six acres that partially-vacant (in one parcel).

All of the commercial and industrial sites identified as vacant or partially vacant within the Coburg UGB are serviceable or can be serviced in the future. Water service is available to all sites. The City does not presently have a sewer treatment system, but is scheduled to initiate construction of the system in 2004. All sites are accessible.

## **TRANSPORTATION**

Transportation access is critical for economic development in Coburg. Firms must have transportation access so that workers and customers can reach their location, and so that shipments of supplies and products can easily arrive and leave the site.

Transportation systems consist of regional and local facilities. The primary regional facility in Coburg is I-5, which provides access to regional, national, and international markets. Proximity to I-5 is an important comparative advantage for Coburg, particularly to attract firms that need a high degree of access for employees, suppliers, customers, and shipping products. Access to I-5 in Coburg is limited by the capacity of the Coburg interchange on I-5. This interchange consists of a narrow overpass that limits capacity and truck movements. This interchange currently experiences extreme congestion during shift change at Monaco Coach and Marathon Coach, the two largest employers in Coburg.

The State's Statewide Transportation Improvement Plan for 2002–2005 lists improvement of the northbound exit ramp off I-5 at the Coburg interchange. According to ODOT staff, the current ramp is failing during AM peak hours. Traffic destined for the RV manufacturing firms consistently backs up on to I-5. Construction of ramp improvements is slated for 2004.

The ramp improvements slated for 2004 are a temporary fix. The entire interchange will need to be reconstructed at some point in the near future. In addition to ramp deficiencies, the bridge is too narrow. According to ODOT, reconstruction of the interchange was in the design phase as the time this report was written. Reconstruction of the interchange is at least 10 years out.

Additional work in 2004 will better define the issues related to the interchange and accommodated future population and employment growth in Coburg. An update to the City's Transportation System Plan (TSP) will occur

in 2004. A key component of the plan will be an Interchange Area Management Plan.

After I-5, Coburg Road is an important transportation facility linking Coburg to Eugene-Springfield to the south and Harrisburg to the north. This is a County road that was recently reconstructed and is relatively well-maintained. The local street system in Coburg is adequate for current development and to serve existing vacant sites within city limits. Internal roads may be needed for development of some vacant sites in Coburg, but these roads would probably be paid for by the developer. Extension and improvements to local collector roads will be needed if the City seeks to add land to accommodate employment growth beyond the capacity of existing vacant sites. The transportation system plan update will identify road needs, assess alternative routes, identify connections between the local and regional system, and resolve potential conflicts resulting from the routing of major streets. The TSP update will incorporate the results of this study and be coordinated with a comprehensive plan and zoning ordinance update in 2004.

Transit service in Coburg is operated by Lane Transit District, which offers six buses each weekday, three in the morning and three in the afternoon. In addition, LTD provides express bus service between Eugene Station and the Monaco Coach plant twice daily on weekdays, once in the morning and once in the late afternoon. LTD bus service links Coburg with the Downtown Eugene transit station, where riders can make connections to most LTD bus routes. There is no Saturday or Sunday transit service in Coburg. Transit service helps link Coburg to the larger Eugene-Springfield labor market. Limited transit service may constrain the availability of labor in Coburg, particularly for employers that rely on workers that may not have access to a car because of income or disability. Population and employment growth in Coburg may lead to more frequent bus service.

Coburg is not served by a railroad. Lack of railroad access makes Coburg a poor location for firms engaged in heavy manufacturing, warehousing and distribution, and other activities that rely on rail access.

## **PUBLIC SERVICES**

The availability of public services is crucial to support employment growth in Coburg. Water and sewer service are essential for production and to support employees in the workplace. Police and fire services are needed to protect the assets of firms in Coburg.

Coburg currently does not have sewer service; residents and firms in Coburg are served by on-site septic tanks and drainfields. The amount of residential and commercial development in Coburg is limited by the lack of sewer service, and sewer service will be necessary to support forecast population and employment growth. The City's Wastewater Facilities Plan (September 1, 1999) identifies options for the development of a wastewater collection and treatment system. The recommended wastewater collection

and treatment system has a phase one cost of \$8.5 million.<sup>38</sup> Construction of the system in a single phase is recommended if funding is available, as there is little environmental improvement from the first \$5.5 million spent. Grants and low-cost loans may be available from State and Federal sources, but some level of local funding will be needed.<sup>39</sup> Note that the first phase will only have a capacity of around 1,020 persons, which was the forecasted 20-year population when the plan was developed. In fact, Coburg has already exceeded this population figure: according to the Population Research Center at Portland State University, Coburg's population was 1,050 in 2003.

The City of Coburg owns and operates the Coburg Water System, which serves businesses and residents within the Coburg city limits. According to the 1999 Water System Master Plan Update,<sup>40</sup> Coburg relies on groundwater for supply, has two 500,000 gallon ground-level reservoirs for storage, and a booster pump station. Comparing existing firm supply (total supply with the largest well off-line) to maximum design day demand shows that the City has a current firm supply deficit of 285 gallons per minute (gpm), which is projected to increase to 450 gpm by 2020 because of expected growth. Current water users are not actually experiencing any shortages, but the firm supply deficit suggests that Coburg could have problems meeting current demand if there is a problem with one of its wells, and that Coburg has limited water supply capacity to accommodate anticipated growth. However, the City does have water rights that total 1,216 gpm, sufficient to accommodate projected demand in 2020 and ultimate build out demand projected in the Master Plan.

The Water System Master Plan Update makes several recommendations for improvements to Coburg's water system, including redevelopment of existing wells, development of 1–2 new wells, doubling the amount of water storage capacity, improvements to the distribution system and pump station and development of better lab and office facilities. Costs for recommended near-term improvements to the City's system total almost \$500,000. These improvements were necessary to accommodate development by Monaco Coach and may have already been made. Remaining improvements recommended in the Water System Master Plan Update have a total cost of \$2.8 million in 1999 dollars. As with needed wastewater improvements, grants and low-cost loans may be available from State and Federal sources but some level of local funding will be needed. The City is in the process of reviewing this plan, it is expected that the cost figures will change. It is also possible that other issues will emerge from the planning process.

According to the Oregon Economic & Community Development Department, the Coburg Rural Fire Department has one station and 27 paid and volunteer fire fighters, and the Coburg Police Department has seven paid

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<sup>38</sup> This number will likely change (probably increase) as the City completes engineering of the sewer system and moves into the update of the Public Facilities and Services plan and 2004.

<sup>39</sup> Brown and Caldwell. 1999. *City of Coburg Wastewater Facilities Plan*. September 1.

<sup>40</sup> HGE Inc. June 10, 1999.

officers and eight reserve officers. This level of fire and police protection may be adequate for the existing population and employment base in Coburg, but may need to be increased as the population and employment grows.

## **UTILITIES**

According to the Oregon Economic & Community Development Department, Coburg is served by Northwest Natural for natural gas and Pacific Power and Light for electricity. Rates for industrial and commercial customers vary by need and may be negotiated for very large consumers of utilities.

## **LABOR FORCE**

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.

The labor force in Coburg is not limited to local residents; firms in Coburg attract workers from surrounding communities, and residents of Coburg may work in other communities. The labor market area in Coburg includes the Eugene-Springfield metropolitan area and rural communities in the southern Willamette Valley.

The Lane Council of Governments conducted a survey for the Lane Transit District of employees at Monaco Coach that asked employees their place of residence. As Coburg's largest employer, the extent of the labor market area for Monaco Coach is a good indicator of the labor market area for Coburg as a whole. Table 5-7 shows the place of residence by zip code for Monaco Coach employees that reported this information in the survey. Table 5-7 shows that 63% of Monaco Coach employees are from Eugene or Springfield. At least 3% of Monaco Coach employees commuted from the communities of Cottage Grove, Junction City, Creswell, and Veneta and Elmira combined. The geographic area bounded by these communities represents the primary labor market area for firms located in Coburg.

Table 5-7 shows that a small share of Monaco Coach employees were from more outlying communities, such as Oakridge and Blue River, but the number of employees is too small to include these communities in the primary labor market area for Coburg. Surprisingly, no employees of Monaco Coach reported living in Harrisburg, despite its relative proximity.

**Table 5-7. Distribution of Monaco Coach employees by place of residence, 2001**

Zip Code	City	Share
97402	Eugene	18%
97478	Springfield	18%
97477	Springfield	16%
97404	Eugene	11%
97424	Cottage Grove	7%
97401	Eugene	6%
97448	Junction City	6%
97408	Eugene	5%
97405	Eugene	4%
97426	Creswell	3%
97487	Veneta	2%
97455	Pleasant Hill	1%
97437	Elmira	1%
97463	Oakridge	1%
97419	Cheshire	1%
97403	Eugene	0%
97431	Dexter	0%
97413	Blue River	0%
97434	Dorena	0%
97488	Vida	0%
<b>Total</b>		<b>100%</b>

Source: Lane Council of Governments, 2001.

The availability of skilled labor is critical for economic development. A recent statewide survey in Oregon found that nearly one-half of Oregon's employers in Lane County said that a shortage of skilled workers made it difficult to find qualified workers to fill job vacancies.<sup>41</sup> Service occupations account for 31% current job openings, far more than the 16% share of the employed workforce in Service occupations. Production and Transportation occupations account for 25% of current vacancies but only 16% of the employed labor force. Occupations in these categories are proportionately over-represented in the share of current vacancies. Professional and Management occupations, however, are proportionately underrepresented, with only 17% of current vacancies but 32% of the employed workforce. Sales and Office occupations are 23% of current vacancies, roughly in proportion to their 26% share of the employed workforce.<sup>42</sup>

Availability of labor depends not only on the number of workers available, but the quality, skills, and experience of available workers as well. The Oregon Employment Department reports that Lane County had 12,210 unemployed workers in September 2003, 7.3% of the labor force. Lane

<sup>41</sup> Oregon Employment Department. 2003. *Portrait of the Workforce: An Oregon Employer Perspective. Results from the 2002 Oregon Employer Survey for Region 5*. Salem: Research Section, Workforce Analysis Unit. January. <http://www.qualityinfo.org/olmisi/PubReader?itemid=00002766>

<sup>42</sup> Employed workforce shares from U.S. Census. 2000. *Profile of Selected Economic Characteristics: 2000*. Eugene-Springfield, OR MSA.

County's unemployment rate was equal to the State level but above the U.S. rate of 5.8%.<sup>43</sup> The Oregon Employment Department does not have any information on the skills or experience of unemployed workers in the state.

## HOUSING

Housing is an important component of any economic development strategy. Goal 10 requires cities to develop strategies to provide housing affordable to households at all income levels. In addition to concerns about availability of housing affordable to lower income households, issues of providing higher quality housing for managers need to be considered in both housing and economic development strategies.

Moreover, ORS 197.296 requires communities to inventory buildable residential lands and conduct a housing needs analysis. Such an analysis is presented in Chapter 4 of this report.

The preferred population growth alternative developed by the City of Coburg shows that buildable residential land has a capacity to accommodate 2,300 additional residents between 2005 and 2025. Accommodating this population growth, however, requires expansion of the City's sewer capacity. Since employees in Coburg could live in Eugene-Springfield or other communities in the southern Willamette Valley, housing capacity is not crucial for increasing employment in Coburg. Housing availability, however, is important if Coburg seeks to attract employers who wish to offer their employees the quality of life and short commute that comes from living and working in a small town. Housing is also important to maintain a balance between jobs and housing to reduce automobile commuting and to achieve other economic development goals.

## RENEWABLE AND NON-RENEWABLE RESOURCES

Coburg is located near large areas of forest land owned by private owners and under Federal management by the Forest Service and Bureau of Land Management. Much of this forestland has been roaded and is managed for timber production. Despite reduced logging because of environmental concerns, the proximity to supplies of raw timber mean that forestry, logging, and other production related to the forest will remain important economic activities in the southern Willamette Valley and western Oregon. Coburg's proximity to timber supplies and I-5 might allow it to attract firms engaged in lumber and wood products manufacturing or related activities. A Weyerhaeuser lumber mill is currently located north of Coburg (employment at this mill is not included in the Coburg employment data presented in this chapter because the mill is too far away from the City's UGB).

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<sup>43</sup> Oregon Employment Department. 2003. *Oregon Labor Force and Unemployment by Area (Not Seasonally Adjusted)*. Salem: Research Section, Workforce Analysis Unit. October 16. <http://www.qualityinfo.org/pubs/rolf/pdf/03/rolf1003.pdf>

Coburg is also located in an area with prime agricultural land, particularly to the north and west of the city. The proximity to prime farmland can help Coburg attract businesses that support farming activities, such as farm equipment manufacturing and sales. Coburg might also attract businesses in food processing or markets that sell local agriculture products, such as organic farms or specialty nurseries. The development of the local agriculture industry can help support the small-town character of Coburg. Development of a farmer's market or similar farm stands could help attract visitors to Coburg and create synergy with existing businesses and events in the city.

Coburg also has several hundred acres of land are designated and zoned for sand and gravel extraction and processing along the McKenzie River west of Coburg Road (owned and operated by both Egge Sand & Gravel Co and Wildish Sand & Gravel Co.). Aggregate is a non-renewable resource that is becoming more and more difficult to develop in the Willamette Valley.

The resource on the north side of the McKenzie has been designated in county planning documents since before 1980, and most of it is zoned and permitted for sand and gravel operations. Based on conversations with staff at the two aggregate operations, the resources on the north side of the McKenzie could last 30 to 40 or more years.

Transport of aggregate is an issue germane to the City's planning efforts. According to staff at Wildish, the company will be transporting the excavated aggregate to the processing plant on the south side of the McKenzie via a conveyor belt bridge. Egge will continue to use Coburg Road.

The implications of this is that when the city starts looking at where the UGB should be expanded, aggregate resource needs should be considered so that identified aggregate resources can be protected and conflicting uses can be avoided. None of the lands designated for sand and gravel use are included in the review of areas for potential UGB expansions in this study; this resource should be considered in future studies.

## EMPLOYMENT FORECAST

A forecast of employment growth in Coburg through 2025 is necessary to forecast demand for buildable land and public services in Coburg. In order to estimate demand for buildable land by type, employment by industry was grouped into three categories that have similar types of land use:

- **Commercial:** Retail Trade.
- **Office:** Finance/Insurance/Real Estate and Services
- **Industrial:** Agricultural Services/Forestry/Fishing, Mining, Construction, Manufacturing, Transportation/Communications/Utilities, and Wholesale Trade.

These categories of land use type do not include Public land uses because employment in the Government industry cannot be reported due to protect the confidentiality of individual employers (in this case, the City of Coburg). Planning for Public land uses should be based on an analysis of the types of public facilities that will be needed as Coburg grows. Planning for public land uses will be conducted by the City as a separate periodic review project to complete a Public Facilities and Services Plan.

Table 5-8 shows employment in Coburg and Lane County by land use type in 1997 and 2002. Lane County is included in Table 5-8 for comparison. Table 5-8 shows that employment in Coburg is dominated by industries with Industrial types of land uses, which account for 85% of employment in Coburg compared to 29% in Lane County. Coburg's employment in industries with Commercial and Office land uses have substantially smaller shares of employment compared to Lane County. As Coburg grows, the distribution of employment by land use type should move closer to the distribution in Lane County, which requires that the share of Coburg's Industrial employment to decline while the shares in Commercial and Office increase.

**Table 5-8. Employment in Coburg and Lane County by land use type, 1997–2002**

Land Use Type	1997		2002		97-02 AAGR
	Emp	Share	Emp	Share	
<b>Coburg</b>					
Commercial	134	8%	213	7%	9.7%
Office	165	10%	225	8%	6.4%
Industrial	1,315	81%	2,550	85%	14.2%
<b>Total</b>	<b>1,614</b>	<b>100%</b>	<b>2,988</b>	<b>100%</b>	<b>13.1%</b>
<b>Lane County</b>					
Commercial	27,813	21%	28,968	21%	0.8%
Office	62,616	48%	69,323	50%	2.1%
Industrial	41,318	31%	39,577	29%	-0.9%
<b>Total</b>	<b>131,747</b>	<b>100%</b>	<b>137,868</b>	<b>100%</b>	<b>0.9%</b>

Source: ECONorthwest, from confidential ES-202 employment data provided by the Oregon Employment Department.

Note: AAGR is Annual Average Growth Rate.

The City of Coburg developed three forecasts of total employment growth that correspond to population growth alternatives presented earlier in this report. The employment growth alternatives are shown in Table 5-9. This table shows that these employment growth alternatives would have total employment growing at an average annual rate of 1.3% to 1.8% over the 2000–2025 period, slowing to 0.1% to 0.5% over the 2025–2050 period. Employment growth slows after 2025 because the City expects that existing vacant land would be built out by 2025 under any of the growth alternatives.

The employment growth alternatives in Table 5-9 are based on the amount of vacant land and assumptions about the number of employees per acre on downtown commercial, highway commercial, and industrial land in Coburg. Employment growth associated with Alternative B and C assume

higher levels of infill and redevelopment after 2025 than the employment forecast associated with the Base Case and Alternative A population forecast.

**Table 5-9. Coburg total employment growth alternatives, 2000–2050**

Forecast	Year			Growth		AAGR	
	2000	2025	2050	00-25	25-50	00-25	25-50
Alternative C	3,717	5,743	6,543	2,026	800	1.8%	0.5%
Alternative B	3,717	5,461	5,799	1,744	338	1.6%	0.2%
Base Case & Alternative A	3,717	5,157	5,257	1,440	100	1.3%	0.1%

Source: City of Coburg, Population and Employment Growth Alternatives and Preferences.

The assumption that existing vacant land in Coburg will be fully developed by 2025 appears reasonable, given Coburg’s comparative advantages (particularly proximity to Eugene-Springfield and access to I-5) and that the forecast employment growth rate is substantially less than the forecast population growth rate. Given the level of employment growth expected in Eugene-Springfield, there is potential for Coburg to attract substantially more employment growth than the levels shown in Table 5-9. For this reason, the supply of buildable land is the primary constraint to employment growth in Coburg, and the employment capacity of existing buildable land (plus expansion and redevelopment) determines the maximum amount of employment growth Coburg can expect over the forecast period.

A community workshop with Coburg citizens and stakeholders was conducted by ECONorthwest in November 2003. The focus of this workshop was to get citizen input on the Coburg Crossroads Vision 2003 and issues related to urban growth in Coburg. Key issues identified by the group included the following points:

- Groups were generally supportive of the goals identified in the vision, but desire additional detail with respect to an economic development strategy.
- The City needs to identify desired industries and provide appropriate sites for those industries.
- The City should take steps to encourage services to locate in the core area, particularly services for local residents such as a grocery store, bank, and similar businesses.
- The groups generally want the City to focus on developing employment opportunities in the Core before expanding the UGB.
- Participants generally want the City to avoid big box retail, auto-oriented businesses, and high-impact businesses.
- There was not consensus about expanding the UGB to accommodate more employment in the 2002-2025 period; however, there was agreement to expand after 2025 to allow for additional employment. This strategy will allow for a better jobs-housing balance to be established in the 2002-2025 period.

- The groups identified areas east of I-5 as areas to expand the UGB to allow for higher density employment.

The City Council considered the issue of land for employment at work sessions held in February and March 2004. Council directed ECONorthwest to assume a need for about 50 additional acres for the 2002-2025 period.

## IMPLICATIONS FOR LAND DEMAND

The City’s employment growth alternatives assume that all of the Coburg’s existing non-residential land supply will be developed by 2025. This assumption appears reasonable, given the City’s relatively small amount of buildable non-residential land, its proximity to Eugene-Springfield and I-5, and expected population growth in Coburg. Chapter 2 presented an updated estimate of the capacity of buildable land in Coburg to accommodate employment; this estimate is repeated in Table 5-10.

Table 5-10 uses an updated estimate of vacant non-residential land in Coburg, and also considers the employment capacity of underdeveloped sites that may redevelop to more intensive uses and expansion areas owned by existing firms in Coburg. Table 5-10 shows that Coburg has capacity of employment growth of 1,920, which is within the range of employment growth forecast by the City’s employment growth alternatives for the 2002–2025 period.

**Table 5-10. Capacity of buildable non-residential land in Coburg, 2003**

Land Type	Acres	Emp/Acre	Employment Capacity	
Downtown Commercial	6	20	120	6%
Highway Commercial	25	10	250	13%
Light Industrial	20	15	300	16%
Underdeveloped	50	15	750	39%
Expansion Areas		n/a	500	26%
<b>Total</b>			<b>1,920</b>	<b>100%</b>

Source: ECONorthwest.

Notes: Underdeveloped sites are sites with an improvement to land value ratio of less than 1:1 (in other words the value of the improvements is less than the value of the land)

Expansion areas are areas owned by existing firms that could accommodate additional employment by those firms.

Employment capacity on “Underdeveloped” is an estimate of capacity *if* all underdeveloped land were to redevelop at higher densities. The assumptions concerning redevelopment are described in Chapter 6.

The employment growth alternatives developed by the City of Coburg implicitly assume that additional buildable land for non-residential uses will not be added over the forecast period. For this reason, the City’s alternatives represent the level of employment growth Coburg can expect if the City takes no action to increase the supply of land. Coburg’s employment growth alternatives can be used as a baseline forecast for discussing whether the City should take action to reduce or increase expected employment growth in Coburg.

If the City wishes to encourage employment growth beyond the level estimated in Table 5-10, it will need to increase the supply of buildable non-residential land. Creating building sites to accommodate additional employment growth requires more than just adding land to the UGB. The sites must be of the size and type required for the type of firms desired by Coburg, with urban services and transportation access. This chapter has provided information on the range of firms that may be attracted to Coburg given its locational advantages, and issues that Coburg may need to address to attract these types of firms. If the City decides to take actions, the information in this chapter will help the City identify the types of firms they would like to attract and actions they must take to create the productive environment desired by these firms.

The City Council directed ECONorthwest to identify an employment forecast that justifies an additional 50 acres of land in the UGB by 2025. Employment growth Alternative A from the *Coburg Crossroads Vision* meets those criteria. Council desires policies that predicate the need on the following factors:

- Coburg is working towards a better jobs housing balance
- Infill development is encouraged before expanding the UGB
- Adequate infrastructure is available to serve development
- The development should be for a “clean and desirable” industry, developed in a campus type environment.

The factors described above will require the City to develop and adopt new policies on jobs/housing balance, infill, adequate public facilities, and a campus industrial zoning district.

Chapter 6 reports input from the City of Coburg regarding their vision for the amount and type of employment growth they would like to see over the next twenty years. Based on this vision, we identify the types of firms that best meet the City’s objectives and the types of building sites, public services, and other characteristics desired by these firms. Chapter 7 examines potential UGB expansion areas and identifies actions the City may want to take to attract desired firms.

## **DRAFT ECONOMIC DEVELOPMENT VISION AND STRATEGY**

Goal 9 requires cities to conduct an economic opportunities analysis (EOA) and to prepare an economic development strategy consistent with the EOA and local economic development objectives. This section presents the draft strategy.

On November 20, 2004, the City conducted a stakeholder workshop. One of the goals of that workshop was to gather stakeholder input on how the City should address economic growth. The input from that meeting as well as

subsequent review of the *Coburg Crossroads Vision* is reflected in an initial draft of the goals and strategies. Stakeholders had an opportunity to review and comment on the draft goals and strategies at the December 11 workshop. This draft reflects that stakeholder input.

## STARTING ASSUMPTIONS AND OBJECTIVES

There are many possible economic futures for Coburg. Many of the factors that will determine that future are outside of the City's control: things like the health of the U.S. and Oregon economies, conditions of international trade and migration, and the policies of other cities in the southern Willamette Valley that encourage or retard growth. But the City of Coburg does have some control over many factors that will affect the type and rate of growth in the City over the next 20 years. It can adopt policies that affect the amount and price of land, and quality and price of public utilities, and incentives and charges to for businesses building and operating in the City.

The challenge for the City is to decide on a future that is not only desirable, but that is also possible given the factors that constrain it. That future is referred to as the City's "economic vision" or "economic development objectives."<sup>44</sup>

Coburg's location and character creates opportunities and constraints. Among the opportunities: proximity to Interstate 5, the City's location as a "neighboring" community to the Eugene-Springfield metropolitan area, a strong industrial base, the City's historic core area, and a high quality of life. Among the constraints: lack of a sewer treatment system, limited capacity of the I-5 interchange, and a diminishing supply of buildable land designated for employment and housing.

It would be unrealistic for Coburg to aspire to, and plan for, accommodating a high percentage of regional economic growth. But it is not unrealistic for Coburg to plan for more manufacturing growth, or even for types of growth it has not had in the past. That growth is not inevitable: whether it occurs will depend, in part, on economic forces beyond the City's control. But it also depends on things the City can influence: the supply of buildable land, the quality and price of public services, quality of life, and incentives for development.

A vision for the future economy of Coburg should be:

- A balance between what the City would like to achieve, and what resources and public support the City can realistically expect to muster in support of that vision
- Consistent with state laws

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<sup>44</sup> In this report, the terms "economic vision" and "economic development objectives" are synonymous.

- Understandable to citizens without technical training or experience with economic development
- Capable of being incorporated into the City's comprehensive plan.

## AN ECONOMIC VISION FOR COBURG

Coburg is an exception among Oregon communities: it has three times as many jobs as it does people. Much of the City's low population to employment ratio can be attributed to two factors: (1) the City's proximity to Interstate-5; and (2) the City's lack of a sewer treatment system. Preliminary estimates indicate that the City will run out of land available for commercial and industrial development before 2025 if historic growth rates continue. At the same time, the City will see an unprecedented increase in population if the sewer system is built.

Questions for Coburg are (1) How much and what type of population and employment growth do the citizens of Coburg want? and (2) How much will they be required to plan for, independent of their desires? Even with strong regional growth, a city does have the ability to use public policy to affect both the amount and rate of growth.<sup>45</sup>

The population question has been partially resolved: the *Coburg Crossroads Vision* adopted by City Council identifies a preferred population forecast. While the City has additional steps to go through to have the population forecast regionally "coordinated" as required by ORS 195.036, the *Vision* as well as the many planning activities that have followed signal a strong intent to take the policy steps required to achieve the population forecast.

The amount of employment the City desires is less settled. It is our opinion that any of the employment forecasts presented in the *Coburg Crossroads Vision* would be achievable if the City took the steps to accommodate the employment. As part of its comprehensive planning, the City will have to find some balance between sometimes conflicting goals of, for example, high-quality public services and low costs, or accommodating employment growth with low-cost land and protecting farmland around Coburg from urbanization.

Input during the stakeholder workshops held in November and December 2003 suggest a range of opinions exist with respect to the amount and location of employment growth, whether the City should expand the UGB to accommodate more employment, and where the UGB should expand if it does. The draft vision that follows is ECO's attempt to summarize that input

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<sup>45</sup> This point is no less true despite the fact that the State requires counties and cities to agree on local population forecasts that when summed for all jurisdiction in a county add to the State's forecast for a county. Local policies can cause actual growth to be higher or lower than the official forecasts.

into a strategy that best addresses the principles listed at the end of the previous section.

The City of Coburg establishes the following economic vision:

- Coburg will work to maintain and enhance its quality of life. In Coburg this means (1) preserving the character of the downtown core area, (2) encourage a broader range of services, and (3) providing housing opportunities for individuals that are employed in Coburg.
- Coburg recognizes its locational advantages (as described in the *Economic Opportunity Analysis*) and believes it is in its interest to manage economic development and growth in the City.
- To that end, Coburg establishes a 2025 employment target of 5,157; an increase of about 2,000 employees between 2002 and 2025. This figure is consistent with the preferred employment forecast in the *Coburg Crossroads Vision*.
- Coburg wants new businesses to start, expand, or relocate in the City that will provide higher-wage jobs and a broader range of goods and services for existing and future Coburg residents.
- Coburg desires to encourage new employment to locate in the core area as appropriate. The comprehensive plan will define the types of commercial activities that area appropriate for the core area.
- New businesses will need, among other things, developable land, good services and transportation, and an educated and skilled labor force. The City should take actions to make sure those things are provided at competitive prices. Coburg will welcome industries that help it achieve its economic vision.
- Coburg wants to maintain and increase the livability of its community as it grows. To that end, the City will ensure that adequate public facilities are available to accommodate new employment and residents.
- Coburg should be strategic about any economic incentives it gives to businesses, ensuring that it has the financial resources to maintain the quality of its facilities and services.

## **GOALS AND STRATEGIES FOR ACHIEVING THE VISION**

A major theme that emerged during the stakeholder workshops was balance. In short, the City should adopt goals and strategies that allow for economic development, but not at the expense of other community goals. Likewise, other community goals should not unnecessarily inhibit economic development.

The following goals and strategies will help achieve the economic vision described above. Overlap among them is unavoidable.

## **GOAL 1: MAINTAIN QUALITY OF LIFE**

A community's quality of life comprises the various location-specific benefits and costs individuals enjoy or endure by living in the community. If the quality of life is, on net, beneficial, it produces a net increase in the standard of living for the local residents. In effect, these net quality-of-life benefits are analogous to a second paycheck that each resident of the community receives, supplementing the first paycheck received from an employer or other source of income. It is the sum of the first and second paychecks that determines the overall well-being of a region's residents.

By many measures, Coburg has a high quality of life. It is essential for the City of Coburg to take steps to maintain a high quality of life.

### **STRATEGY 1.1. ENCOURAGE A VITAL DOWNTOWN AREA**

Coburg has defined downtown with a mixture of retail and office uses, attractive buildings, and a pedestrian-friendly transportation system. Maintaining a vital city center is important to the City's quality of life. A number of issues emerge in considering how to maintain downtown's vitality. Should the City (1) expand employment opportunities downtown? (2) Use incentives to help attract employment to downtown? (3) Identify and remove other barriers to the expansion of employment downtown? (4) Expand employment downtown at all? (5) allow mixed use in the downtown core area?

The issue here, as in many other places, is one of tradeoffs. On the one hand, if City policy makes a point of providing large amounts of land at the edge of the urban growth with full urban services for retail and office development, there may be some negative impacts on the downtown. On the other hand, some of those uses are not appropriate for the downtown, and growth of those uses means more businesses, employees, and residents to support the aspects of the Coburg economy that the downtown specializes in.

The City should define the downtown core area and adopt a clear set of standards for the types of businesses and development that is appropriate in the core area. Based on stakeholder input, the City should consider design standards for the core area.

### **STRATEGY 1.2. DEVELOP AND IMPLEMENT A PARKS AND RECREATION MASTER PLAN**

Parks, open space, and recreational facilities are an important community amenity. Many industries consider quality of life factors when making locational decisions. A good parks and recreation program is one aspect of quality of life that local governments have direct control over.

Coburg does not currently have a parks and recreation master plan. One of the City's goals is to develop a parks and recreation master plan. The plan should be completed and adopted by City Council by the end of 2004.

## **GOAL 2. SUPPORT BUSINESSES IN COBURG**

Many of the strategies to support this goal revolve around workforce issues. While these strategies may not be directly implemented by the City, the City should make efforts to support and coordinate the implementation of these strategies to the extent possible.

### **STRATEGY 2.1. SUSTAIN AND ENHANCE BUSINESS SKILLS AND MANAGEMENT TRAINING AVAILABLE IN COBURG**

Small businesses create a significant share of new jobs, and also have the fewest resources for training to improve the skills of administrative staff or management. This implies that the City needs to coordinate with other appropriate local agencies to identify and market business training opportunities.

### **STRATEGY 2.2. COORDINATE AND SUPPORT OTHER ORGANIZATIONS TO SUSTAIN AND EXPAND WORKFORCE SERVICES AVAILABLE IN COBURG**

A well-educated workforce is essential to attract high-wage jobs. The City should take steps to support and enhance existing workforce training and development services by coordinating with organizations that offer workforce development services to find ways to assist these organizations and take actions to complement existing efforts.

### **STRATEGY 2.3. IMPROVE INFORMATION ABOUT AND ACCESS TO PROGRAMS AVAILABLE THROUGH THE OREGON ECONOMIC AND COMMUNITY DEVELOPMENT DEPARTMENT, SMALL BUSINESSES ADMINISTRATION, AND OTHER AGENCIES**

The Oregon Economic and Community Development Department, Small Business Administration, and other agencies offer a wide variety of financial assistance programs for existing businesses. Each program has different funding criteria and application requirements. A service to provide one-stop information to match the needs of employers to existing funding sources could increase the assistance available in Coburg and reduce the response time for assistance. This point relates also to Goal 6, Coordination.

## **GOAL 3. SUPPORT EFFORTS TO CREATE HIGH-WAGE JOBS IN COBURG**

Maintaining and creating family-wage jobs was mentioned several times in the stakeholder workshops. A family wage job should be defined as a job with an hourly wage sufficient for a household of four to afford the prevailing HUD fair market rent without experience cost burden (paying more than 30%

of household income for housing). In 2002, a family wage job in Coburg would pay a minimum of \$13.00 per hour.

### **STRATEGY 3.1. COORDINATE WITH OTHER ECONOMIC DEVELOPMENT ORGANIZATIONS TO DEVELOP A COHERENT AND EFFECTIVE MARKETING PROGRAM**

A variety of public agencies and private organizations help market Coburg as a business location. These include Lane Metropolitan Partnership and Lane Workforce Development, but could include many other organizations. The City should coordinate with these organizations to develop a marketing strategy that best uses the resources of each organization. A coordinated strategy makes the best use of existing resources and presents a united front to prospective firms.

### **STRATEGY 3.2. DEVELOP INCENTIVES TO RETAIN AND EXPAND EXISTING FIRMS**

In general, stakeholders were not particularly supportive of providing financial incentives as a significant component of the City's overall economic development strategy. The goal of retaining existing businesses, however, emerged as an important one. The City should adopt specific policies concerning incentives for business retention. A typical business expansion and retention strategy would begin with a task force that would visit local firms and identify issues. Firms that may expand or relocated are “red flagged.” The task force then reconvenes to set priorities and to tailor incentives or strategies specific to each firm.

### **STRATEGY 3.3. MAINTAIN AND ENHANCE COBURG’S IMAGE AS A COMMUNITY**

Coburg should maintain and expand an image as a community that has a high quality of life and one that is fair to business. This strategy is about more than marketing—it is about creating a reality in which the City Council, City Planning Commission, staff, and City policy make it easy for businesses to understand and comply with the rules for development in Coburg.

This strategy probably involves developing a set of standards for development, redevelopment, and infill in the historic core area. It also implies establishing a way of doing business that enhances the perception that Coburg is fair and consistent in the way it treats businesses.

## **GOAL 4: PROVIDE ADEQUATE INFRASTRUCTURE EFFICIENTLY AND FAIRLY**

Public infrastructure and services are a cornerstone of any economic development strategy. If roads, water, sewer, and other public facilities are unavailable or inadequate, industries will have little incentive to locate in a

community. Infrastructure and services includes transportation, water, sewer, and stormwater facilities.

The implementing strategies for this goal should reflect the City's objective to "manage economic growth." This can largely be implemented through policies on municipal infrastructure and services. Focusing public investments in infrastructure is one tool the City can use to direct growth to appropriate areas. Moreover, a capital improvement plan that ties to a land use plan and funding capacity is a key to managed growth.

#### **STRATEGY 4.1. PROVIDE TRANSPORTATION FACILITIES ADEQUATE TO SERVE LAND NEEDED FOR THE TYPE OF DEVELOPMENT DESCRIBED IN THIS ECONOMIC DEVELOPMENT PLAN**

A sound transportation system is not only essential for economic development—it is also a key element in maintaining a high quality of life. The update of the Coburg Transportation System Plan will identify a number of improvements necessary to accommodate population and employment growth. As part of its economic development strategy, the City should carefully consider the impact of the transportation system on economic development during this review and ensure that adequate improvements are programmed to accommodate forecast employment growth. Though the plan should address improvements for all modes of travel, it must be realistic about the ability of non-auto travel to solve problems of traffic congestion, and it should rigorously assess the extent to which the growth forecast for Coburg can be accommodated without highway improvements. In summary, the economic development strategy and transportation system plan must be mutually supportive: the transportation capacity must be in place to support employment growth; the economic development strategy places some boundaries on how much employment growth the City is willing to accommodate.

#### **STRATEGY 4.2. SUPPORT EFFORTS TO ADDRESS CAPACITY LIMITATIONS AT THE I-5 INTERCHANGE**

The I-5 interchange will constrain capacity of the City to accommodate future employment growth. According to ODOT staff the Interchange is already at failure during the AM peak period. Improvements scheduled for 2004 should address the immediate AM peak issues. In the long term, however, the interchange does not have capacity to accommodate much more employment. Exact capacity figures are not available at this time; a study of the interchange's capacity and potential alternatives is scheduled for 2004. A major interchange upgrade is probably at least 10 years out.

#### **STRATEGY 4.3. PROVIDE WATER, SEWER, AND STORMWATER DRAINAGE SERVICE ADEQUATE TO SERVE LAND NEEDED FOR DEVELOPMENT**

The lack of a sewer treatment system has limited residential growth in Coburg. As the existing land designated for employment diminishes, Coburg

will have a need to address infrastructure issues. Towards that end, the City will develop functional plans that address needed improvements for water, sewer, and stormwater drainage. This strategy ensures that adequate capacity and service is available to support new development. The City should review and amend these functional plans to be consistent with any changes made to the land use and transportation plans. Moreover, the City should require adequate infrastructure be available prior to development (adequate public facility requirements).

#### **STRATEGY 4.4. ENSURE THAT FINANCING FOR INFRASTRUCTURE IS ADEQUATE AND FAIR**

Public investment in infrastructure is a long run investment. Financing is sufficient if covers full lifecycle costs, including operations and maintenance. This goal may require review of the existing procedures for evaluation of public facility costs. It may also require consideration of new funding sources to ensure adequate funds are available for operations and maintenance of public facilities.

While it is somewhat subjective, sound financing policies generally attempt to have people pay in proportion to cost imposed or benefits received. Implementing that principle will require a review of current utility capital improvements plans and rate structures, and may require amendments to both.

In all cases, the City should take efforts to get funding from federal and state sources to continue to improve and expand the City's infrastructure.

#### **GOAL 5: DIVERSIFY EMPLOYMENT BASE**

Having a diverse mix of industries can help buffer local economies from economic cycles. While the EOA suggests that Coburg has a relatively strong manufacturing base, much of the employment is in the RV manufacturing and sales sections. Diversification should be an ongoing economic development goal.

#### **STRATEGY 5.1. PROVIDE DEVELOPABLE LAND NECESSARY TO ACCOMMODATE ECONOMIC GROWTH**

An adequate land base is important for many economic reasons. Moreover, statewide land use policy required cities to provide a 20-year supply of buildable land. Without an adequate land base, Coburg cannot expect to diversify its employment base.

In the longer run, this strategy could include activities such as reviewing the City's development code to identify areas where greater land-use efficiency can be attained, redesignation of lands, or expansion of the urban growth boundary. The amount and location of vacant lands designated for employment growth should be determined through the City's employment

forecast, the site requirements of desired industries, and the City's ability to provide services to those lands.

### **STRATEGY 5.2. RESEARCH AND DEVELOP POLICIES THAT DISCOURAGE BIG-BOX RETAIL AND STRIP COMMERCIAL USES**

Coburg's location at the northernmost I-5 interchange in the Eugene-Springfield metropolitan area makes it an attractive location for big-box retailers. Input received during the stakeholder workshops suggests that Coburg residents do not want big-box retail and the impacts that come with those uses. The City should consider policies such as a maximum floor area in certain zones, restricting uses in the downtown core, and "smart growth" principles to prevent big box and strip commercial development.

## **GOAL 6. COORDINATE ECONOMIC DEVELOPMENT ACTIVITIES**

Coordination of activities is as an important issue. Not enough coordination occurs now; we recommend the City take a lead role in fostering coordination of economic development efforts.

### **STRATEGY 6.1. DEVELOP CITY INSTITUTIONAL STRATEGY FOR A CITY ECONOMIC DEVELOPMENT PROCESS**

An Economic Development Team would have the primary responsibility of coordinating the efforts of the various organizations to create a coherent and effective economic development strategy for Coburg. This should include coordination with Lane County, infrastructure providers, and other regional and statewide organizations to support economic development in Coburg.

### **STRATEGY 6.2: COORDINATE WITH SCHOOL DISTRICT**

Good schools are important to both citizens and businesses. As new businesses are attracted to Coburg, those industries may require specialized skills. The City should coordinate with the Eugene 4J School District to maintain the City's elementary school. The City should also explore other funding and operating opportunities to maintain the Coburg Elementary School as a vital part of the community.

# Comparison of Land Supply and Demand

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This chapter summarizes from data and analysis presented in Chapters 2 through 5 to compare “demonstrated need” for vacant buildable land with the supply of such land currently within the Coburg UGB and city limits. Chapter 2 described population and employment forecasts, Chapter 3 described land supply, Chapter 4 described residential land needs, and Chapter 5 described land needed for employment.

This chapter begins with a discussion of population and employment forecasts. Chapters 4 and 5 estimated lands needed for housing and employment. Other facilities, however, will require land. The following section estimates land needed for other uses; the chapter concludes with a comparison of land supply and land demand for the 2002-2025 and 2025-2050 time periods.

## POPULATION AND EMPLOYMENT FORECASTS

The evaluation of population and employment forecasts presented in Chapter 2 provides the foundation for estimating land need. A stakeholder group engaged in the City of Coburg’s *Crossroads Vision* process selected Growth Alternative A as the preferred forecast for Coburg. The Alternative A population forecast is for a 2025 population of 3,327 and a 2050 population of 6,701. This results in population increase of 2,337 persons between 2002 and 2025 and 5,711 persons between 2002 and 2050. City Council adopted this growth forecast as their preferred forecast in the *Crossroads Vision*; at the time this report was completed the population figures were not coordinated as required by ORS 195.036. In the absence of a coordinated population forecast, City Staff directed ECONorthwest to use the Alternative A forecast for the purpose of the Urbanization Analysis.

The Coburg *Crossroad Vision* indicated a preference for the Alternative A employment forecast. Employment growth Alternative A was developed by LCOG to represent full build out of commercial and industrial lands in the UGB. Alternative A results in a 2025 employment of 5,157 and a 2050 employment of 5,257. The low amount of employment increase in the 2025 – 2050 period is due to limited land availability. Many of the parcels that were vacant when LCOG developed Alternative are now built out; employment on those parcels occurred at densities lower than LCOG expected. Thus, the capacity of buildable and redevelopable lands in the UGB is somewhat less at this time. Rather than constrain employment growth, the Coburg City Council directed ECONorthwest to use an employment growth forecast that justifies a need for 50 additional acres in the UGB (the LCOG Alternative A forecast results in a need for about 57.6 acres). Employment growth Alternative A justifies this need, which is consistent with the draft economic development strategy presented in Chapter 5.

The issue of employment growth is one that was discussed at two stakeholder workshops conducted as part of this project. Stakeholder input did not show a consensus among stakeholders. Some stakeholders were comfortable with expanding the UGB to accommodate the LCOG forecast; others felt that the City should not expand the UGB to accommodate more employment for two reasons: (1) to allow new housing to decrease the jobs/housing imbalance; and (2) to allow infrastructure to be developed to accommodate new employment. Key infrastructure includes the sewer system and the I-5 interchange upgrade.

In February 2004, ECONorthwest conducted a joint work session with the Coburg City Council and Planning Commission to address the employment forecast issue. The Council and Commission struggled with the same issues as the stakeholders, with a particular concern about transportation capacity. Council directed ECO to complete the urbanization study assuming LCOG's Alternative A which will require about 57.6 acres of land be added to the UGB for commercial or industrial uses between 2002 and 2025. The Council, consistent with stakeholder input, will evaluate lands east of the I-5 interchange for possible inclusion in the UGB as well as Urban Reserve Areas at a future date.

Consistent with this direction, the City will plan for a 2050 employment figure of 5,257. The key issue becomes one of timing: when will the City have the service capacity to accommodate new employment? While the answer to this question is somewhat speculative, the City is far along enough in its planning efforts that it is reasonable to assume it is willing and will be able to provide services to accommodate population and employment growth that will occur within the existing UGB.

Given these constraints, the next step is to estimate capacity for employment growth within the existing UGB. Such an estimate needs to include not only the capacity of buildable land (vacant and partially vacant), but also the amount of employment growth that will not need any land or will occur on redeveloped land. Table 6-1 summarizes the employment forecast based on the capacity analysis.

**Table 6-1. Employment forecast and capacity, 2002-2025**

<b>Land Type</b>	<b>Acres</b>	<b>Emp/ Acre</b>	<b>Emp Capacity</b>	<b>Emp</b>
<b>Existing Employment, 2002</b>				2,988
<b>Buildable land</b>				
Downtown Commercial	6	20	120	
Highway Commercial	25	10	250	
Light Industrial	20	15	300	
<b>Subtotal</b>	<b>51</b>		<b>670</b>	
<b>Redevelopment</b>				
Underdeveloped	50	15	750	
Percent that will redevelop			20%	
<b>Subtotal</b>			<b>150</b>	
Growth requiring no land			500	
<b>Growth not accommodated on existing land in UGB</b>			<b>849</b>	
New Employment 2002-2025			2,169	2,169
New Employment 2025-2050				100
<b>Total Employment, 2050</b>				<b>5,257</b>

Note: Growth requiring no land includes expansion of employment for existing industries as well as employment such as sole proprietors that locate in residential zones.

Table 6-1 shows that Coburg has capacity for approximately 1,320 additional employees within its current UGB. This figure assumes that 20% of land classified as underdeveloped will redevelop by 2025 and that 500 employees will not require additional commercial or industrial land. The City will need to identify areas to accommodate about 850 employees outside the existing UGB for the 2002-2025 period. Assuming an average density of 15 employees per gross acre, Coburg will need to add about 57.6 acres of employment land to accommodate this additional job growth.

## LAND NEEDED FOR OTHER USES

Cities need to provide land for uses other than housing and employment. Public facilities such as schools, hospitals, governments, churches, parks, and other non-profit organizations will expand as population increases. Many communities have specific standards for parks. School districts typically develop population projections to forecast attendance and need for additional facilities. All of these uses will potentially require additional land as a city grows.

Previous chapters estimated land demand for housing and employment; this section considers other uses that consume land and must be included in land demand estimates. Demand for these lands largely occurs independent of market forces. Many can be directly correlated to population growth.

For the purpose of estimating land needed for other uses, ECO classified these lands into three categories:

- *Lands needed for public operations and facilities.* This includes lands for city offices and maintenance facilities, schools, state facilities, substations, and other related public facilities. We calculated land needs using acres per 1,000 persons for all lands of these types.
- *Lands needed for parks and open space.* Coburg does not have a parks master plan that establishes a parks and open space standard. The current Comprehensive Plan, however, provides some indication of what the City desires as a park standard: “it is recommended as part of the comprehensive plan that some time in the future the City acquire at least ten acres for a public park site that could provide sufficient space for a swimming pool, tennis courts, baseball/softball field and other active recreational uses.” The parkland need estimates presented in this chapter use a standard of 10 acres per 1000 residents.
- *Lands needed for semi-public uses.* This includes hospitals, churches, non-profit organizations, and related semi-public uses. ECO calculated land needs using acres per 1,000 persons for all lands of these types.

Table 6-2 shows land in public and semi-public uses by type. The data show that Coburg had a total of 40.4 acres in 31 tax lots in public and semi-public uses in 2003. This equates to about 41 acres per 1000 persons. The largest uses were the City of Coburg, the School District 4J, and religious organizations.

Table 6-2 also shows assumed need. The assumed need will be applied to population to estimate future lands needed for public and semi-public uses. The adjustments were made to account for Coburg’s size, future population growth, and averages from other cities. For example, the City owns a lot of property; some of that property is not developed and will be made available for future expansion of City operations thus reducing the future need for City land.

**Table 6-2. Summary of public and semi-public uses by type, Coburg, 2003**

Type of Use	Tax Lots	Acres	Persons	Assumed
				Acres/ 1000 Persons
City	16	27.4	27.7	5.0
County	1	0.0	0.0	0.0
Fire District	1	1.0	1.0	1.0
Fraternal	3	0.4	0.4	0.4
Religious	5	2.3	2.3	2.3
School	1	9.3	9.3	0.0
State	4	0.0	0.0	0.0
<b>Total</b>	<b>31</b>	<b>40.4</b>	<b>40.8</b>	<b>8.7</b>

Source: LCOG GIS data; analysis by ECONorthwest  
Public and semi-public land uses occur in all plan designations.

Public and semi-public uses occur in most plan designations in Coburg. Table 6-3 shows public and semi-public land uses by plan designation. The data show that 85% of the City's public and semi-public uses occur within residential zones. Uses in residential zones commonly include city lands, schools, churches, and fraternal organizations.

**Table 6-3. Summary of public and semi-public uses by plan designation, Coburg 2003**

Plan Designation	Number		Percent of Acres
	of Tax Lots	Acres	
Central Business District	8	1.2	3%
Park/Recreation	2	3.1	8%
Public Water Service	1	1.5	4%
Residential	20	34.5	85%
<b>Total</b>	<b>31</b>	<b>40.4</b>	<b>100%</b>

Source: LCOG GIS data, analysis by ECONorthwest

Table 6-4 shows estimated need for public and semi-public land for the period 2002-2025 and 2025-2050. Based on the assumed land need, Coburg will need to plan for about 39 acres for public and semi-public uses between 2002 and 2025 in addition to the 41 acres already in public and semi-public uses. Moreover, the City will need about 63 additional acres for public and semi-public uses for the period between 2025 and 2050.

**Table 6.4. Estimated public and semi-public land need, Coburg UGB, 2002-2025 and 2025-2050**

Type of Use	Existing Acres	Acres/ 1000 Persons	Assumed Need (Ac/ 1000 Persons)	Est. Land Need		Est Add Land Need	
				2025	2050	2002-2025	2025-2050
City	24.3	27.7	5.0	16.6	33.5	0.0	16.9
County	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Fire District	1.0	1.0	1.0	3.3	6.7	2.3	3.4
Fraternal	0.4	0.4	0.4	1.3	2.7	0.9	1.3
Parks	3.1	3.1	10.0	33.3	67.0	30.2	33.7
Religious	2.3	2.3	2.3	7.7	15.4	5.4	7.8
School	9.3	9.3	0.0	0.0	0.0	0.0	0.0
State	0.0	0.0	0.0	0.0	0.0	0.0	0.0
<b>Total</b>	<b>40.4</b>	<b>40.8</b>	<b>18.7</b>	<b>62.2</b>	<b>125.3</b>	<b>38.8</b>	<b>63.1</b>

Source: LCOG GIS data; analysis by ECONorthwest

## SUMMARY OF LAND NEED AND DEMAND

Table 6-5 shows a comparison of estimated land need and land demand for the Coburg UGB between 2002 and 2025 and 2025-2050. The results lead to the following findings:

- The City does not have a surplus of land in any category.
- The City will need to add about 57.6 acres of land to accommodate employment between the 2002-2025 period.
- The City will need 219.4 acres of land to accommodate development for the 2002-2025 period. The majority of this land will be for residences, with smaller amounts needed for parks and public/semi-public uses.
- The City will need to identify 340.4 acres that can be put into urban reserve areas to accommodate growth for the 2025-2050 period.

**Table 6-5. Comparison of land need and land supply, Coburg UGB, 2002-2025 and 2025-2050**

Plan Designation	Land Need		Gross Buildable Acres	(Deficit) Surplus	
	2002-2025	2025-2050		2002-2025	2025-2050
Central Business District	5.2	1.0	5.2	0.0	(1.0)
Highway Commercial	25.2	1.3	25.2	0.0	(1.3)
Light Industrial	76.2	3.3	18.6	(57.6)	(3.3)
Park and Recreation	30.2	33.7	0	(30.2)	(33.7)
Public / Semi Public	22.8	60.9	0	(22.8)	(60.9)
Residential	167.9	240.2	59.1	(108.8)	(240.2)
<b>Total</b>	<b>327.5</b>	<b>340.4</b>	<b>108.1</b>	<b>(219.4)</b>	<b>(340.4)</b>

Note: Negative numbers represent a deficit of acres and are shown in parenthesis (). The numbers represent the amount of buildable land that Coburg will need to add to its UGB to accommodate development.



# Evaluation of Potential UGB Expansion Areas

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The buildable land inventory and assessment of its future land needs presented in the body of this report, concluded that an additional 219.4 acres of gross vacant buildable land beyond the current urban growth boundary would be necessary in order to serve the city's anticipated growth to the year 2025. An additional 340.4 acres will need to be added to the Coburg UGB to accommodate forecasted growth between 2025 and 2050.

Statewide planning Goals 9, 10 and 14 all require cities to provide a 20-year supply of buildable land within urban growth boundaries (UGBs). The process and criteria for justifying an expansion of an existing urban growth boundary are found in several State planning laws and goals. Most important to this process are those found in Oregon Revised Statute 197.298 (Priority of land to be included within urban growth boundary), Goal 2 (Exceptions process), and Goal 14 (Urbanization). ORS 197.298 establishes the following priorities for expanding UGBs:

1. Established Urban Reserves;
2. Exception land, and farm or forest land (other than high value farm land) surrounded by exception land;
3. Marginal lands designated pursuant to ORS 197.247;
4. Farm and forest land.

Coburg has no urban reserve or marginal lands adjacent to its urban growth boundary. There are, however, exception lands and farm lands adjacent to the Coburg UGB.

To provide for the unmet future need, Coburg must inventory and assess the lands that surround its current boundary to determine those lands that are most appropriate to accommodate future urban development, consistent with Goal 14 and the City's plan policies.

This chapter summarizes ECONorthwest's preliminary evaluation of potential areas for a UGB expansion. A more detailed description of each UGB study area is presented in Appendix A.

## UGB EXPANSION STUDY AREAS

Table 7-1 summarizes basic parcelization and zoning characteristics of the eight UGB expansion study areas. In total, the study areas include more than 1,000 acres adjacent to the existing UGB. Map 7-1 shows the location

and zoning of the eight UGB expansion study areas. The study areas include all lands zoned as exceptions that are adjacent to the existing UGB.

Table 7-1 shows that the average lot size of parcels in resource zones (lands zoned for exclusive farm use) are larger than those in exceptions zones (lands zoned for rural residential use). This is not surprising; the resource zones have larger minimum lot size and less development than the exceptions areas.

Table 7-1 also shows the development capacity of lands in exceptions areas and resource areas. In total, land in exceptions zones have an estimated development capacity of approximately 555 dwelling units. The capacity estimates are based on a density of 3.0 dwelling units per gross residential acre (a gross density of about 4.0 dwelling units per net acre).<sup>46</sup> Coburg needs land for approximately 900 new dwelling units between 2002 and 2025. The housing capacity in exceptions lands and areas within the UGB may be insufficient to meet the City's need, thus, Coburg may have justification to bring some resource land into the UGB. The City must consider the seven Goal 14 factors when evaluating which resource lands to include in an expanded UGB.

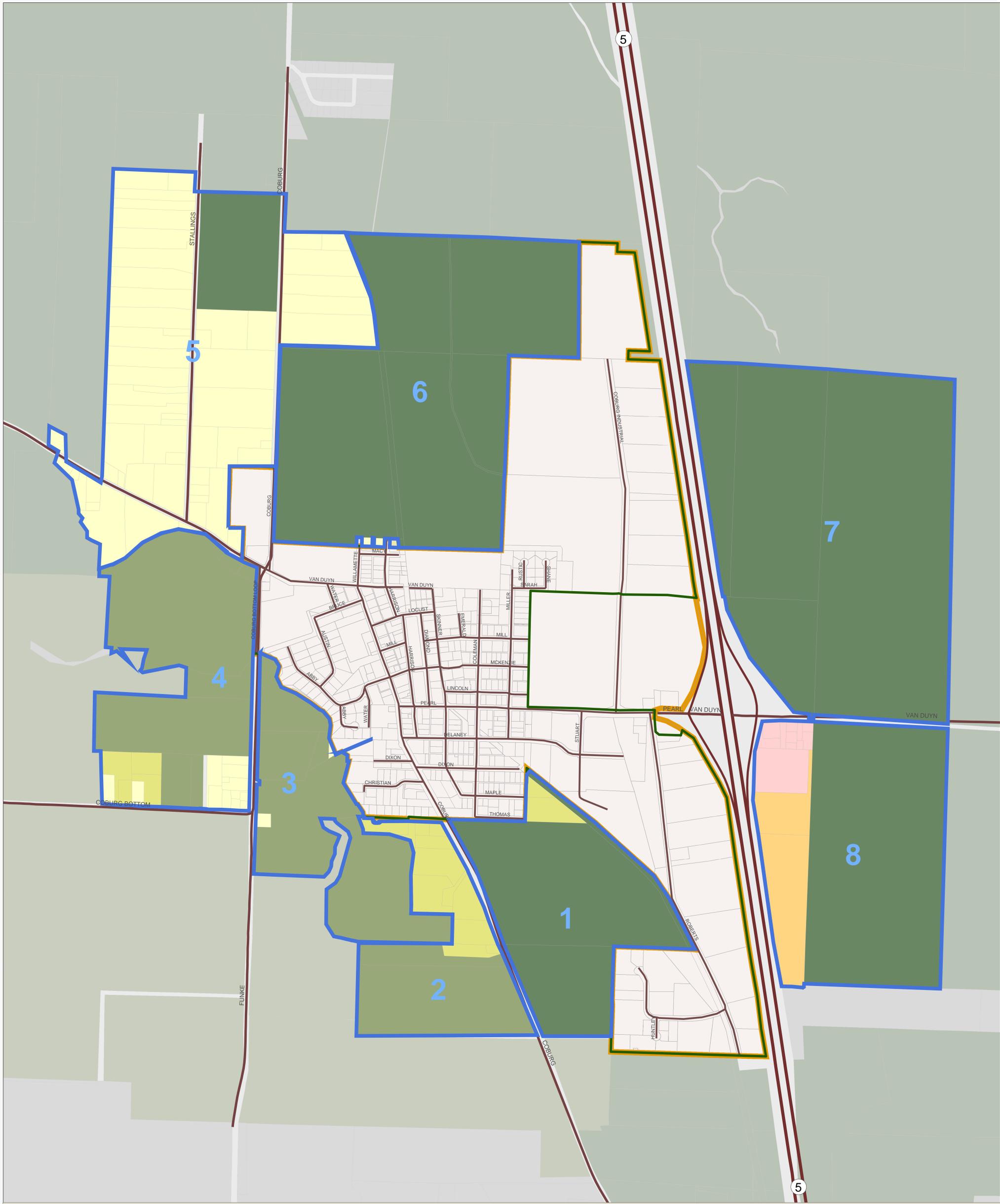
Table 7-1 also shows the capacity for employment in study areas 1, 7 and 8. These areas were identified as areas for employment expansion during community workshops.

**Table 7-1. Summary of UGB expansion study areas**

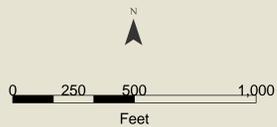
Variable	UGB Expansion Study Area							
	1	2	3	4	5	6	7	8
Tax Lots	5	15	8	24	56	7	3	13
Total Acres	94.5	64.6	74.1	108.9	199.8	208.8	239.9	141.8
<b>Exceptions Zones</b>								
Tax Lots	2	13	3	17	55	3	0	11
Acres	4.4	22.7	0.8	16.6	171.7	0.8	0.0	36.1
Dwelling units	2	8	1	11	39	2	0	0
Developed acres	1.0	4.0	0.5	5.5	19.5	0.8	0.0	36.1
Vacant acres	3.4	18.7	0.3	11.1	152.2	0.0	0.0	0.0
DU Capacity (@3 DU/GA)	10	56	0	33	456	0	0	0
<b>Resource Zones</b>								
Tax Lots	3	2	5	7	1	4	3	2
Acres	90.2	41.8	73.3	92.3	28.1	208.0	239.9	105.7
Dwelling units	1	1	1	0	4	4	0	0
Developed acres	0.5	0.5	0.5	0.0	2.0	2.0	0.0	0.0
Vacant acres	89.7	41.3	72.8	92.3	26.1	206.0	239.9	105.7
DU Capacity (@6.5 DU/GA)	582	268	472	600	169	1338	1559	687
Emp Capacity (@20 Emp/GA)	1793	NA	NA	NA	NA	NA	4797	2114

Source: LCOG Assessment data; analysis by ECONorthwest

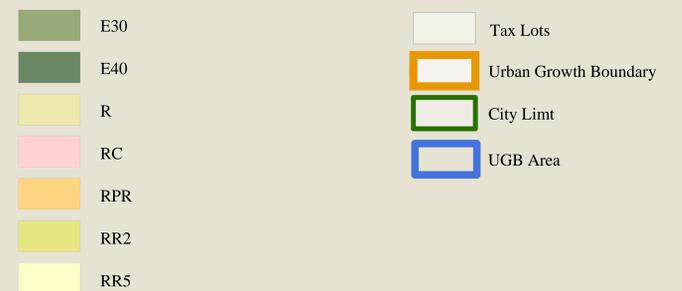
<sup>46</sup> ECO used a density assumption of 3.0 dwelling units per net acre to reflect the realities of developing exceptions areas. The lower density assumption is justified by parcelization patterns, lot sizes, access, and development constraints.



**Map 7-1. UGB Study Areas - Zoning**  
**Buildable Land Inventory**  
**City of Coburg**  
**Oregon**



**Zoning Classification**



# SOILS

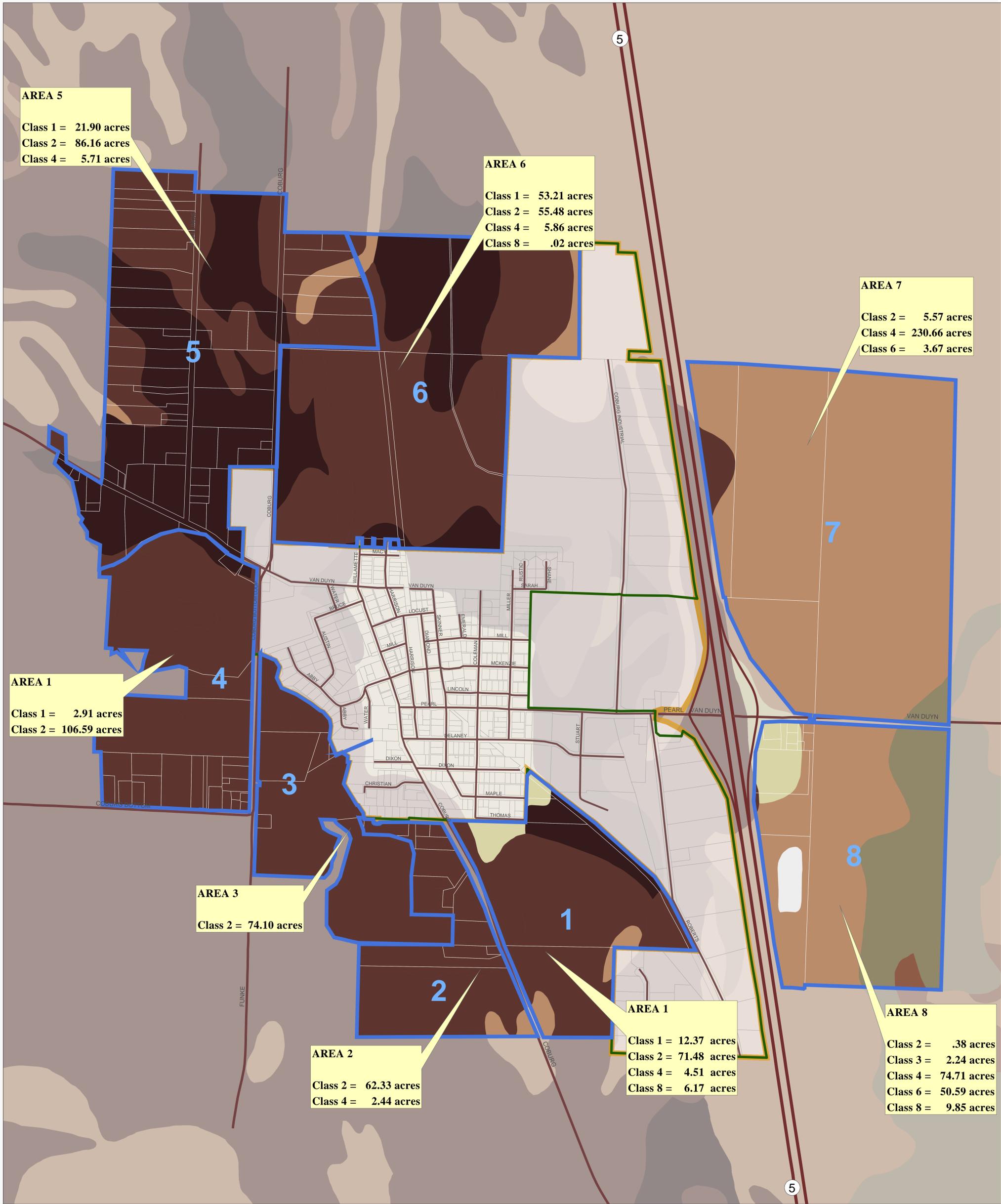
Statewide planning Goal 14 identifies seven factors cities must consider when evaluating lands of UGB expansions. Factor 6 addresses retention of agricultural land “with Class I being the highest priority for retention and Class VI the lowest priority.”

Table 7-2 shows soil class by UGB study area. Study areas 1, 4, 5, and 6 have Class 1 soils present within lands zoned for resource uses. With the exception of study area 8, all of the study areas have Class 2 soils present. Study areas 7 and 8 have significant percentages of Class 4 or higher soils.

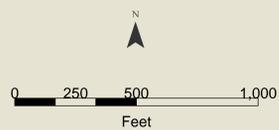
**Table 7-2. Summary of soil class by UGB study area and zoning**

Study Area	Zone	Soil Class								Total
		1	2	3	4	5	6	7	8	
<b>Acres</b>										
1	E40	9.5	71.5		4.5				4.7	90.2
2	E30		39.4		2.4					41.8
3	E30		73.3							73.3
4	E30	2.9	89.4							92.3
5	E40	18.7	9.4							28.1
6	E40	63.6	138.5		5.9					208.0
7	E40		5.6		230.7		3.7			239.9
8	E40			2.2	53.2		50.3			105.7
<b>Percent of Acres</b>										
1	E40	11%	79%	0%	5%	0%	0%	0%	5%	100%
2	E30	0%	94%	0%	6%	0%	0%	0%	0%	100%
3	E30	0%	100%	0%	0%	0%	0%	0%	0%	100%
4	E30	3%	97%	0%	0%	0%	0%	0%	0%	100%
5	E40	67%	33%	0%	0%	0%	0%	0%	0%	100%
6	E40	31%	67%	0%	3%	0%	0%	0%	0%	100%
7	E40	0%	2%	0%	96%	0%	2%	0%	0%	100%
8	E40	0%	0%	2%	50%	0%	48%	0%	0%	100%

Source: Rural Lands Database; analysis by InfoGraphics Lab and ECONorthwest



**Map 7-2. UGB Study Areas and Soils**  
**Buildable Land Inventory**  
**City of Coburg**  
**Oregon**



**Soil Capability Classification**



## DEVELOPMENT CONSTRAINTS

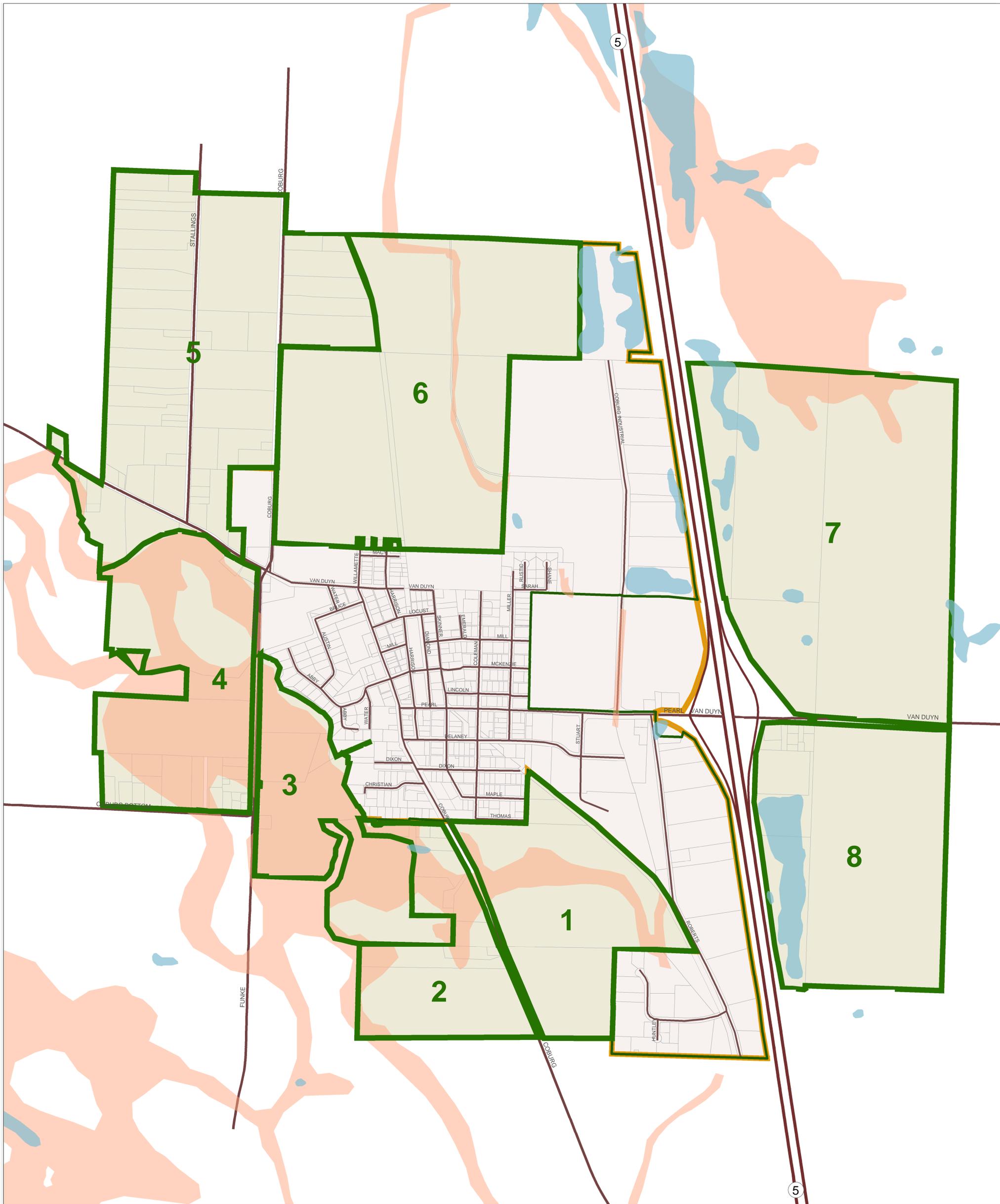
Not all lands within the UGB will be appropriate for development. Coburg should be concerned about areas in wetlands and floodplains as it determines where to expand its UGB. No significant areas with steep slopes exist in any of the UGB study areas. Coburg presently allows development within floodplains provided that the development meets the Federal Emergency Management Agency's (FEMA) and other applicable standards. Development in identified wetlands may be subject to permitting processes through the Army Corps of Engineers and the Division of State Lands.

Table 7-3 summarizes combined flood and wetland constraints by UGB study area and zone (exceptions and resource zones). Map 7-3 shows the extent of the constraints. The data show that UGB study areas 2 and 3 are substantially within the identified 100-year floodplain. Because of this fact and elevation differences of UGB study areas 2 and 3, ECO recommends eliminating these areas from further consideration for UGB expansion.

**Table 7.3. Summary of floodplain and wetland by UGB study area and zone**

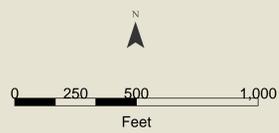
Study Area	Resource Zones			Exceptions Zones			Total Acres (all zones)
	Const Acres	Unconst Acres	Total Acres	Const Acres	Unconst Acres	Total Acres	
1	16.3	73.8	90.2	0.0	4.4	4.4	94.5
2	5.7	36.1	41.8	14.0	8.7	22.7	64.6
3	59.3	14.0	73.3	0.6	0.2	0.8	74.1
4	59.7	32.7	92.3	6.9	9.7	16.6	108.9
5	0.0	28.1	28.1	2.0	169.8	171.7	199.8
6	7.0	201.0	208.0	0.0	0.8	0.8	208.8
7	23.3	216.6	239.9	0.0	0.0	0.0	239.9
8	0.0	105.7	105.7	8.0	28.1	36.1	141.8

Source: LCOG Assessment data; analysis by ECONorthwest



**Map 7-3. Constrained Lands  
Within UGB Study Areas  
Buildable Land Inventory  
City of Coburg  
Oregon**

- |  |   |
|--|---|
|  National Wetland Inventory |  Tax Lots              |
|  100 Year Floodway          |  Urban Growth Boundary |
|  UGB Area                   |  City Limit            |



## PRELIMINARY EVALUATION OF UGB STUDY AREAS

ECO conducted a preliminary evaluation of the eight UGB study areas with respect to the seven goal 14 factors:

- *Factor 1: Demonstrated need to accommodate long-range urban population growth requirements consistent with LCDC goals.* Given the population and employment forecasts, lands in any of the UGB study areas could be justified to meet factor 1. The amount of land, however, cannot exceed estimated housing, employment, and public needs.
- *Factor 2: Need for housing, employment opportunities, and livability.* While all of the study areas could be justified for housing need, areas 1 through 6 are better suited given other factors. Areas 7 and 8 would be best suited for employment given their proximity to the I-5 interchange. Area 1 would also be suitable for employment. Area 6 has the highest potential to increase livability due to its location close to downtown and the elementary school
- *Factor 3: Orderly and economic provision for public facilities and service.* ECO did not conduct a detailed cost study, nor are such estimates included in the City's water and wastewater plans. ECO did meet with City staff to discuss the relative cost and efficiency of servicing the various UGB study areas. Area 6 appears to be the easiest and cheapest area to service due to its proximity to the sewer trunk line and the wastewater treatment plan.

Areas with large amounts of exceptions lands (areas 2, 4, 5, and 8) will create challenges to providing services due to pre-existing development. The City is in the process of applying for a UGB expansion for the exceptions portion of area 8. It has not determined when services will be extended to that area. If it decides to extend services earlier in the planning period, then the remainder of area 8 is a good candidate for inclusion in the UGB.<sup>47</sup>

Areas 1, 2, 3, and 4 would all require wastewater pump stations. This issue is more pronounced in areas 3 and 4 which have a greater elevation differential.

- *Factor 4: Maximum efficiency of land uses within and on the fringe of the existing urban area.* LUBA has generally used the term efficiency to mean contiguous or adjacent to existing development. Areas 1 and 6 probably have the greatest ability to meet the intent of this factor due to their proximity to the existing UGB. Area 5 meets this factor to a lesser extent.

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<sup>47</sup> ECO has previously noted that Area 8 is a prime location for employment due to its proximity to the interchange. Areas further from the interchange may be good candidates for housing.

- Factor 5: *Environmental, energy, economic and social consequences.* Areas 2, 3, and 4 have the greatest potential for environmental impact given the amount of floodplain in these areas. Areas 1 and 6 probably have the least energy consequences from a transportation and service-delivery perspective because of their location to the UGB. Any expansion that affects lands that are actively farmed has potential for economic impacts. Exceptions areas have the greatest potential for social impacts.
- Factor 6: *Retention of agricultural land as defined, with Class I being the highest priority for retention and Class VI the lowest priority.* A previous section evaluated soil class. Areas 7 and 8 have the lowest priority soil classes and are thus most consistent with this factor. Areas 5 and 6 have the largest number of acres in Class 1 soils.
- Factor 7: *Compatibility of the proposed urban uses with nearby agricultural activities.* Areas with more land contiguous to existing development, such as areas 1 and 6 are probably most compatible with nearby agricultural activities. However, any land that is adjacent to agricultural activities will have an impact with respect to Factor 7. ECO's cursory evaluation of this factor suggests that the compatibility impacts do not appear to be much different between the UGB study areas.

In summary, the City faces some difficult decisions regarding where to expand its UGB. ORS 197.298 requires the City to look at exceptions lands first. There is significant capacity for new housing on exceptions lands, however, there may not be support of existing landowners to be brought into the UGB and the development patterns in the exceptions areas, particularly those in Study areas 2 and 5 present significant service obligations to the City. Moreover, the exceptions areas may not be able to provide lands to meet all of the City's identified housing needs.

From an urban form, efficiency, and cost of service perspective, Area 6 appears to be the best choice. Unfortunately, Area 6 is primarily in Class 1 and 2 soils, making it lower priority based on Goal 14 factor 6. Area 1 has many similar attributes as Area 6 and has fewer acres in Class 1 soils.

Areas 7 and 8 are the highest rated lands based on the Goal 14 Factor 6 hierarchy. These areas, however, would require the City to expand across I-5 for housing as well as extending water and sewer services to the areas. The City has signaled some intent to move that direction by applying to have the exceptions areas included in the UGB. ECO's evaluation, however, is that the lands east of the Interstate and in close proximity of the interchange (1,500 – 2,000 feet) are prime lands for industrial and office employment. Workshops held as part of this project suggest the public is supportive of taking steps to retain these lands for future employment.

ECO's recommendation is that the City initially focus its evaluation on areas 5 and 6. Area 5 meetings the exceptions requirement; Area 6 would

round out the UGB and provide opportunities for extending Willamette Street. Moreover, these are areas that were identified in the visioning process as highest priority.

If the more detailed evaluation of Area 6 suggests that it will be difficult to justify, we recommend Areas 1 and the exceptions components of Areas 2 and 5 as the next area to focus on.

# Conclusions and Recommendations

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The intent of this technical report was to (1) update the factual base of the housing and economic elements of the Comprehensive Plan, and (2) identify policy issues that the City should address during the update of the Comprehensive Plan and Zoning Ordinances. Data presented in the previous chapters addressed buildable lands, housing, and economic development. This chapter summarizes that information and presents a series of recommendations for consideration by Coburg's decision-making bodies.

It is important to note that this study builds from previous work by the City. The *Coburg Crossroads Vision* provided a set of recommended policies as well as a conceptual land use map. This study recognizes the work that went into that process and presents recommendations that are consistent with the *Coburg Crossroads Vision*.

## CONCLUSIONS AND RECOMMENDATIONS

This section lists key planning and development issues the City should address during the Comprehensive Plan and Zoning Ordinance updates. Because of the relationship between various plan elements and policies, there is overlap across categories.

### FORECASTS

- **Coburg does not have a coordinated population forecast.** ORS 195.036 requires cities to “coordinate” their population forecasts with the designated coordinating body (the Lane Council of Governments). Population forecasts are one of the key variables in determining housing and residential land need.

The City Council signaled its preference for the population forecast Alternative A when it adopted the *Coburg Crossroads Vision* document. Alternative A forecasts a 2025 population of 3,327 and a 2050 population of 6,701. These figures are used throughout this report (see Table S-1 in the Executive Summary).

The fact that the City does not have a coordinated population forecast makes the findings on housing and residential land need presented in this report uncertain.

#### **Recommendation:**

1. **The City should continue to work with the Lane Council of Governments (LCOG) to resolve the population forecast coordination issue at the earliest possible point.**

A major constraint is that LCOG is waiting for updated county forecasts from the state Office of Economic Analysis (OEA), Department of Administrative Services. The most recent OEA county forecasts are from 1997. OEA released the updated county forecasts in April 2004. The 2025 figure of 3,327 falls between the Region 2050 population range of 2,400 to 3,400 and is slightly higher than the preliminary LCOG figure of 2,950 as referenced in LCOG's March 23<sup>rd</sup> letter to the City.

- **Coburg is not required to have an adopted employment forecast.** The City Council endorsed employment forecast Alternative A in the *Coburg Crossroads Vision*. Alternative A was essentially a land-constrained forecast developed by LCOG. Alternative A forecasts 5,157 jobs in 2025 and 5,257 in 2050 (see Table S-1 in the Executive Summary).

#### **Recommendations:**

1. **Use the Alternative A employment forecast.** The LCOG Alternative A 2025 forecast is for 5,157 employees. The City will need to add about 57.6 gross acres of land to the UGB to accommodate the 2025 forecast (see Table 8-1, page 8-13). The Alternative A 2050 forecast is for 5,257 employees; a net growth of 2,269 over 2002 and 100 over 2025. Coburg will have to add about 5.6 acres to accommodate employment between 2025 and 2050 (see Table 8-1, page 8-13). The City should review both the employment forecast and the land supply for commercial and industrial land at an appropriate point in the future. The City should adopt this forecast.
2. **Expand the UGB to accommodate the Alternative A employment in the 2002-2025 study period.** ECO estimates that Coburg has capacity for about 1,320 employees within the existing UGB. To accommodate the 2025 employment forecast of 5,157, the City will need to add about 57.6 acres to the UGB. This figure is based on 850 employees at 15 employees per gross acre (see Table 6-1, page 6-3). Council desires policies that predicate the need on the following factors:
  - Coburg is working towards a better jobs housing balance
  - Infill development is encouraged before expanding the UGB
  - Adequate infrastructure is available to serve development
  - The development should be for a “clean and desirable” industry, developed in a campus type environment.

The factors described above will require the City to develop and adopt new policies on jobs/housing balance, infill, adequate public facilities, and a campus industrial zoning district.

## DEVELOPMENT INSIDE THE UGB

### RESIDENTIAL DEVELOPMENT

- **Coburg does not have enough land to meet residential land needs between 2002 and 2025.** The buildable lands inventory concluded that Coburg has about 59.1 acres of vacant and partially-vacant residential land (see Table 3-3, page 3-6). Using a density assumption of 7.0 dwelling units per net acre (5.4 dwelling units per gross acre) the City has capacity for about 320 dwellings *inside the UGB* (59.1 acres divided by 5.4 dwelling units per acre). The housing needs assessment identified a need for 893 new housing units between 2002 and 2050 (see Table 4-11, page 4-17). Thus, the City does not have sufficient land to accommodate housing needs.

#### **Recommendation:**

1. **Expand the UGB to accommodate housing needs.** The housing needs analysis identified a need for about 168 acres of residential land, or 109 acres more than what the City presently has. The City will require an additional 240 acres for housing between 2025 and 2050 (see Table 8-1, page 8-13). The exact size of the UGB expansion will depend on what exceptions areas are brought in and final determinations about housing density and mix.
- **The Community has expressed concern about infill and redevelopment in existing developed areas within the City Limits.** This issue emerged in the *Coburg Crossroads Vision*, as well as both stakeholder workshops. Infill is defined as development on vacant or under-utilized land. Redevelopment requires the razing of existing buildings and development of new buildings at a higher density. Both activities are allowable under existing policies and will likely be allowable under new policies.

ECO's evaluation of infill potential in developed residential areas within the City limit identified *potential* for about 100 lot partitions if the City adopts a 7000 sq. ft. minimum lot size. The amount of actual infill probably be much less due to building footprints and landowner desires. ECO estimates that between 10% and 20% of partitionable lots will receive infill in the 20-year planning period, or about 10-20 lots over the 20-year period.

## Recommendations:

1. **Evaluate options for preserving community character.** This recommendation applies to existing developed areas within Coburg. Options could include design standards, density standards or limits allowable uses in developed core area. With respect to residential areas, the residential zone currently allows multiple family housing types up to fourplexes. One option is to amend the residential district to allow only single-family housing types. The City should facilitate additional discussions regarding these options.
  2. **Adopt infill standards that apply consistently to *all* developed residential areas within the city limit.** Given concerns about the compatibility of in existing residential areas, the City should adopt design standards for any infill that occurs in existing residential areas.
- **The Coburg Comprehensive Plan residential system is inadequate to meet identified housing needs.** The existing Coburg comprehensive plan only has one residential plan designation and zone. This is inadequate to meet the intent of statewide planning Goal 10: Housing.

The Coburg Comprehensive Plan includes policies that encourage a mix of housing types (Policies 4 and 5). The Coburg zoning ordinance identifies single-family dwellings, duplexes, tri-plexes, and fourplexes as outright allowable uses in the residential zone. This zoning system cannot be shown to meet identified housing needs because it does not guarantee that land will be available to meet identified needs for medium and high density housing types (e.g., apartments, condominiums, townhomes).

## Recommendation:

1. **Amend the comprehensive plan to include high-, medium-, and low-density residential designations.** The zoning code should be amended to include high-, medium-, and low-density districts similar to those described in Table 4-13 (see page 4-19). Residential plan designations could also include a mixed-use designation that would accommodate a variety of housing types as well as supporting commercial uses. If the City chooses to use such a system, it will need approximately 94 acres of low-density, 48 acres of medium density, 13 acres of high-density, and 13 acres of mixed-use residential lands (see Table 4-14, page 4-19).
- **The City has identified housing needs.** The housing needs assessment in chapter 4 identified the following housing needs:

- A need for 893 dwelling units between 2002 and 2025, and for 2,201 dwelling units between 2002 and 2050 (see Table 4-11, page 4-17).
- A housing mix of 75% single-family and 25% multiple family, or 670 single-family dwellings, and 223 multifamily dwellings (see Table 4-11, page 4-17).
- The City will need about 148 gross acres zoned for single-family housing types and about 20 gross residential acres zoned for multifamily housing types (see Table 4-14, page 4-19).
- An overall density of 7.0 dwelling units per net acre; or 5.4 dwelling units per gross acre (see Table 4-12, page 4-18).
- A need for additional units for households earning \$30,000 or less annually.
- A need for housing to accommodate young families, senior citizens, and individuals who work in local manufacturing plants.

**Recommendation:**

1. **Coburg should consider a range of tools to meet the housing needs of present and future residents.** Goal 10 requires Coburg to adopt policies that allow it to meet identified housing needs, and that facilitate the attainment of needed housing density and housing mix. The City should adopt strategies to achieve the identified housing mix of 75% single-family and 25% multifamily. This mix, along with a revised zoning system will allow the City to meet an overall density of 7.0 dwelling units per net acre for new housing. Tools should include:
  - **Multiple residential zones.** The city should revise the zoning code to include at a minimum high-, medium-, and low-density residential zones.
  - **Consider a mixed-use zone.** The housing needs analysis identified need for about 13 acres of land designated for mixed use. The City should also consider revising the zoning code to include a mixed-use residential/commercial zone. This zone should be applied near the downtown area or near other public facilities. The zone should allow for mixture of housing types and associated retail and office uses.
  - **Provide sufficient land to meet identified housing needs.** ECO identified a need for about 168 gross residential acres. This breaks down to about 148 gross acres zoned for single-family housing types and about 20 gross

residential acres zoned for multifamily housing types. (see Table 4-12, page 4-18)

- **Reduce minimum lot sizes.** The City should consider revising the zoning code to allow lot sizes smaller than 10,000 sq. ft. in areas of Coburg that are already developed. The City should consider minimum lot sizes of 7,000 sq. ft. in existing developed residential areas (supported by design guidelines). The City should consider minimum lot sizes of 6,000 sq. ft. in the low density residential zone, and minimum lot sizes of 5,000 sq. ft. in the medium density residential zones.
- **Accessory dwelling units.** The City should adopt an accessory dwelling unit ordinance. An accessory dwelling unit ordinance could complement strategies to allow infill development in existing developed residential areas.

## NON-RESIDENTIAL DEVELOPMENT

- **Coburg has sufficient land designated for commercial and industrial uses to accommodate employment growth between 2002 and 2025.** Coburg has approximately 50 acres of buildable commercial and industrial lands. ECONorthwest estimates these lands can accommodate about 670 employees (see Table 6-1, page 6-3). Additionally, some employment will not require vacant land (e.g., home occupations, businesses that add employment at existing factories, etc.), and some employment will locate on land that is redeveloped at higher densities. ECONorthwest estimates that 650 employees could be accommodated on these lands (500 on land that is currently classified as redeveloped and 150 on land that is classified as underdeveloped; see Table 6-1, page 6-3). The exact amount of employment that requires no land or locates on redeveloped land is uncertain and depends on a variety of factors including regulations on home occupations, policies on infill and redevelopment, as well as economic factors that affect major industries in Coburg.

### Recommendation:

1. **Adopt a 2025 employment forecast of 5,157.** Based on ECO's analysis, this employment forecast will result in all lands designated for commercial and industrial uses in the UGB to develop. The City will need about 106.6 acres for employment and has about 49 buildable acres within the UGB. Thus, the City will need to add about 57.6 acres to the UGB to accommodate employment.
2. **Accept the Alternative A 2050 employment target of 5,257.** The City will need a total of 5.6 acres of land designated for commercial and industrial uses to accommodate this

forecast between 2025 and 2050 and will have used all of the buildable land for employment by 2025 resulting in a need for 5.6 acres between 2025 and 2050 (see Table 8-1, page 8-13).

- **The buildable lands inventory identified approximately 19 acres of vacant or partially-vacant land designated for light industrial uses.** These lands could accommodate between 300 and 500 new employees. Additionally, both Monaco and Marathon have indicated that they have capacity on their existing sites to add employees if necessary.

**Recommendation:**

1. **Expand the UGB to ensure that the industrial land base is sufficient for the 2002-2025 planning period.** The City will need to add about 57.6 acres to accommodate new employment.
- **Lands designated for Highway Commercial uses present both opportunity and risk.** The City has 25 vacant acres designated for highway commercial uses. The opportunities associated with these lands are the ability to accommodate desired types of commercial uses.

However, the highway commercial zone (C-2) presently allows retail uses that would include big box retailers. Considerable concern was expressed during the stakeholder workshop about the potential for big box retail.

The bulk of Coburg's vacant highway commercial land is in one 25-acre parcel in the northwest quadrant of the I-5 interchange. ECO's evaluation is that the site will be extremely attractive to auto-oriented uses such as fast food restaurants and big box retailers when services become available and it is annexed.

**Recommendations:**

1. **Amend the C-2 zone to place a maximum building size or footprint of 50,000 sq. ft. or less.** This will preclude most big box development.
2. **Amend the C-2 zone to remove residential uses from the list of outright allowable uses.** The C-2 zone presently allows residences as an outright use. The City should remove this permitted use to ensure that lands in C-2 are developed in commercial uses.
3. **Add design standards for commercial uses in this zone.** Design standards will give the City more control over development in the C-2 zone.
4. **Consider placing a master plan requirement on the 25-acre site adjacent to the interchange, or redesignate the**

**site for business park uses.** The 25-acre vacant parcel northwest of the interchange is a key asset to the City for future employment.

- **Coburg’s present ordinances do not encourage mixed-use development.** Coburg does not presently have a plan designation or zoning district that encourages mixed-use development. The City, however, is interested in implementing “smart growth” principles in the updated comprehensive plan and zoning ordinance. Moreover, input during the stakeholder workshops indicated that stakeholders want more professional and retail services in or near the downtown core area. A mixed-use designation could accommodate such a vision.

**Recommendation:**

1. **Develop and adopt a mixed-use plan designation and zoning district.** The housing needs analysis identified need for about 13 acres of land designated for mixed use. The City should also consider revising the zoning code to include a mixed-use residential/commercial zone. This zone should be applied near the downtown area or near other public facilities. The zone should allow for mixture of housing types and associated retail and office uses.
- **Coburg has a serious jobs/housing imbalance.** In 2002, Coburg had more than 3 jobs for every person, and more than 6 jobs for every dwelling unit. This is unique among Lane County communities; many communities have more housing than jobs. Coburg is a net importer of workers. A typical population/employment ratio for large geographic areas is 2:1. A typical jobs/housing ratio is 1:1.

**Recommendation:**

1. **Coburg should take steps to decrease the jobs/housing imbalance.** The population and employment forecasts described earlier in this chapter are an important step in addressing the jobs/housing imbalance. Consistent with the population and employment forecasts, the City should provide sufficient land to meet housing and employment needs. More specifically, the City Council directed ECONorthwest to identify an employment forecast that justifies an additional 50 acres of land in the UGB by 2025. Employment growth Alternative A from the *Coburg Crossroads Vision* meets those criteria. Council desires policies that predicate the need on the following factors:
  - Coburg is working towards a better jobs housing balance
  - Infill development is encouraged before expanding the UGB
  - Adequate infrastructure is available to serve development

- The development should be for a “clean and desirable” industry, developed in a campus type environment.

## TRANSPORTATION

- **The Transportation System Plan must be coordinated with the Comprehensive Plan.** The City is in the early stages of a process of updating its TSP and developing an interchange management plan.

### **Recommendation:**

1. **Coordinate the TSP with the comprehensive plan, zoning code, and public facilities plan update.**

- **The I-5 Interchange presents both capacity and financial issues.** According to ODOT staff, the current ramp is failing during AM peak hours. Traffic destined for the RV manufacturing firms consistently backs up on to I-5. Construction of ramp improvements is slated for 2004. The ramp improvements slated for 2004 are a temporary fix. The entire interchange will need to be reconstructed at some point in the near future. In addition to ramp deficiencies, the bridge is too narrow. According to ODOT, reconstruction of the interchange was in the design phase as the time this report was written. Reconstruction of the interchange is at least 10 years out. The interchange may be a constraint to employment growth, particularly east of I-5, until the upgrades occur.

### **Recommendation:**

1. **Do not expand the UGB east of Interstate 5 until the City has more clarity on the configuration, timing, and cost of the interchange upgrade.** Make it clear to ODOT that the City intends to expand east of Interstate 5 after the upgrade occurs and that land near the freeway and interchange will be designated for employment uses (primarily industrial and office).

- **Truck traffic through the city core is an issue.** Truck traffic currently has no options other than Willamette and Pearl streets. Increasing truck traffic is incompatible with the City’s vision to maintain the character of historic Coburg.

### **Recommendation:**

1. **Address this issue in the TSP update.** The City should consider alternative routes that bypass the core area. One alternative is to link Roberts Road to Coburg Road on the south side of town.

## UTILITIES

- **The availability of public services is crucial to support employment growth in Coburg.** Water and sewer service are essential for production and to support households and employees. Coburg currently does not have sewer service; residents and firms in Coburg are served by on-site septic tanks and drainfields. The amount of residential and commercial development in Coburg is limited by the lack of sewer service, and sewer service will be necessary to support forecast population and employment growth.

### **Recommendation:**

1. **Complete the water and sewer system master plan.** Coordinate the public facilities planning effort with the comprehensive plan update and the final decision of where to expand the Coburg UGB. Consider cost of providing services as a factor in determining where to expand the UGB.

## NATURAL RESOURCES AND ENVIRONMENT

- **Coburg does not have an adopted park master plan or parkland standard.** Coburg did not have an adopted parks master plan at the time this study was completed. The City's Comprehensive Plan, however, recommends a park standard of 10 acres per 1000 persons.

### **Recommendation:**

1. **Complete the park master plan and adopt a Citywide park standard.** Apply the adopted park standard to obtain a revised estimate of parkland need. The revised parkland need estimate should be included in a revised land need estimate.
- **Wetlands and floodplains do not appear to be a significant constraint to development inside the UGB.** Significant areas of floodplain exist in some of the UGB study areas (1, 2, 3 and 4).

Some wetlands exist within the UGB study areas, although wetland areas are not extensive in any of the UGB study areas. The data used to identify wetlands was the National Wetlands Inventory, which is not as accurate as a local inventory.

### **Recommendation:**

1. **UGB study areas 3 and 4 should be avoided because the large areas within the floodplain.** Other potential UGB expansion areas can meet housing needs without placing property at flood risk.

## ECONOMIC DEVELOPMENT

- **Adopt an economic development vision and strategy.** OAR 660-009-0020(2)(a) requires cities with populations over 2,500 to adopt “community development objectives.” While Coburg is not legally bound to adopt community development objectives, ECO developed a set of objectives as part of this project. The economic development objectives support other components of the urbanization study and should integrate into the housing, transportation, public facilities and urbanization plan elements.

### **Recommendation:**

1. **Review and revise the draft economic development strategy as appropriate.** Adopt the economic development strategy in Chapter 5 as part of the Comprehensive Plan update.

## UGB EXPANSION

- **The City has insufficient lands within the existing UGB to meet identified housing needs.** The City will need about 168 acres of residential land to meet identified housing need over the 2002-2025 planning period. The City presently has about 59 acres of buildable residential land within its UGB (see Table 8-1). Thus, the City will need an additional 109 acres of residential land to accommodate housing need assuming an average density for new housing of 7.0 dwelling units per net acre (5.4 dwelling units per gross acre)

### **Recommendations:**

1. **Add residential land to the UGB.** The City will need to provide 108 acres, or sufficient land to accommodate about 570 dwelling units (this is estimated by subtracting the capacity of existing residential land in the UGB of 320 dwelling units from the total need of about 890 dwelling units). This land should be designated for low-, medium-, and high-density housing types as described in the housing needs analysis.
- **The City will need additional lands to accommodate parks and other public uses.** Assuming a park standard of 10 acres per 1000 persons (as advocated in the Coburg Comprehensive Plan), the City will need about 30 acres of parkland to accommodate park needs between 2002 and 2025. This figure does not account for about 8.5 acres of undeveloped land designated for public use just south of Van Duyn Road and East of Funke Road. This parcel would reduce park needs to about 22 acres. Coburg will need an additional 34 acres of parkland to accommodate population growth forecast between 2025 and 2050.

The City will also need land for other public and semi-public uses such

as religious and fraternal organizations, utility areas, and fire stations. ECO estimates Coburg will need about 22.8 acres of public and semi-public land between 2002 and 2025 and 60.9 acres between 2025 and 2050 (see Table 8-1).

**Recommendation:**

1. **Consider park and public/semi-public uses when finalizing the UGB expansion figures.** These uses will consume land over the next 20 years; the City needs to provide land for these uses.
  2. **Include parcels of sufficient size to meet the largest park identified in the City's park master plan.** Park plans typically have several park classifications. The largest for communities Coburg's size is the "community park" classification which can range from 10 to 20 acres or larger. The City should ensure land of sufficient area and location is available to implement the park master plan.
- **The City has insufficient industrial land to the UGB to accommodate employment.** ECO estimates that Coburg has capacity for about 1,320 employees within the existing UGB.

**Recommendation:**

1. **Expand the UGB to accommodate the 2025 employment forecast.** To accommodate the 2025 employment forecast of 5,157, the City will need to add about 57.6 acres to the UGB. This figure is based on 850 employees at 15 employees per gross acre.
- **ORS 197.298 requires the City to evaluate the feasibility of expanding onto exceptions areas first.** Coburg has about 250 acres of "exceptions" lands adjacent to its UGB. All of the lands west of I-5 are zoned for rural residential uses. After accounting for developed and constrained lands, ECO estimates there is total capacity for about 555 dwelling units in the exceptions areas at a density of 3 dwelling units per gross acre (includes exceptions areas in UGB study areas 1, 2, 4, and 5). The City may be able to justify leaving some of these areas out of the UGB as it gets clearer on what its vision is for urban form, the cost of services, and other Goal 14 factors.

**Recommendation:**

1. **Carefully evaluate each exception area's merit for inclusion in the UGB consistent with the seven Goal 14 factors.** Coburg will be required to include exceptions areas in any UGB expansion for residential uses. Exceptions areas, are expensive to service and landowners may not be willing to divide and develop their lands. Goal 14 factors 2-5 should be

reviewed carefully as the City makes a final determination of which exceptions areas to bring in. Lands in UGB study areas 1, 2 and 5 are good candidates and contain the majority of exception lands within the UGB study areas (about 200 acres and 520 dwelling units).

Residential land in exceptions areas, however, will primarily accommodate low-density housing types. The housing needs analysis found that Coburg will need about 25 acres of land for multi-family housing types. Some of the single-family housing types will be medium density (an average of 7.5 dwelling units per net acre). Because the City has a number of large residential tracts within its UGB it may be able to meet the medium- and high-density housing need on these tracts and resource lands added to the UGB. Whether the City can do this depends on where parks and public/semi-public facilities get located.

- **There may not be enough development capacity vacant lands in the UGB and in exceptions areas to accommodate housing, park, public, and semi-public land needs.** The housing needs analysis identified the need for 893 new dwelling units between 2002 and 2025. If the City brings in all of the exceptions lands in study areas 1, 2 and 5, it still needs land for an additional 371 dwelling units (see Table 7-1, page 7-2). Existing lands within the UGB have capacity for about 320 dwelling units. In short, it appears the City will need to consider expanding the UGB to include some resource lands.

Table 8-1 shows a comparison of estimated land need and land demand for the Coburg UGB between 2002 and 2025 and 2025-2050.

**Table 8-1. Comparison of land need and land supply, Coburg UGB, 2002-2025 and 2025-2050**

Plan Designation	Land Need		Gross Buildable Acres	(Deficit) Surplus	
	2002-2025	2025-2050		2002-2025	2025-2050
Central Business District	5.2	1.0	5.2	0.0	(1.0)
Highway Commercial	25.2	1.3	25.2	0.0	(1.3)
Light Industrial	76.2	3.3	18.6	(57.6)	(3.3)
Park and Recreation	30.2	33.7	0	(30.2)	(33.7)
Public / Semi Public	22.8	60.9	0	(22.8)	(60.9)
Residential	167.9	240.2	59.1	(108.8)	(240.2)
<b>Total</b>	<b>327.5</b>	<b>340.4</b>	<b>108.1</b>	<b>(219.4)</b>	<b>(340.4)</b>

Note: Negative numbers represent a deficit of acres and are shown in parenthesis (). The numbers represent the amount of buildable land that Coburg will need to add to its UGB to accommodate development.

## Recommendations:

1. **Identify approximately 219.4 gross buildable acres of land to expand the UGB for the 2002-2025 period.**

Consideration of Goal 14 factors 1-5 suggests that UGB study areas 5 and 6 are the most appropriate location to expand the UGB for residential uses at this time. This recommendation is consistent with the Hybrid Map developed during the *Coburg Crossroads Vision* project. Goal 14 Factor 6 would place this study area as lower priority than Study areas 7 or 8. However, study areas 7 and 8 are both east of Interstate 5. Moreover, ECO recommends that the City consider these areas for employment growth as well as take steps to preserve these areas for future employment growth.

2. **Coburg should make a strong case for a “special need” for the large tract of residential land adjacent to the existing UGB in study Area 6.** ORS 197.298(3) allows cities to consider other factors when evaluating lands for inclusion in the UGB.<sup>48</sup> The area is close to the elementary school and the core area and can accommodate the higher density housing types identified in the housing needs analysis.

- **Cost of services is an issue.** Some UGB expansion areas will be more expensive to service than others. In general, areas closer to the sewer treatment plant will be cheaper to service than those further away. Slope is also a factor. Coburg is located in a relatively flat area, however, areas south and west of town will require pump stations for sewer treatment.

## Recommendation:

1. **Develop better cost estimates of servicing the various UGB expansion study areas as part of the public facilities and services plan update.** Coordinate this analysis with the comprehensive plan update and the final decision of where to expand the UGB.

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<sup>48</sup> (3) Land of lower priority under subsection (1) of this section may be included in an urban growth boundary if land of higher priority is found to be inadequate to accommodate the amount of land estimated in subsection (1) of this section for one or more of the following reasons:

- (a) Specific types of identified land needs cannot be reasonably accommodated on higher priority lands;
- (b) Future urban services could not reasonably be provided to the higher priority lands due to topographical or other physical constraints; or
- (c) Maximum efficiency of land uses within a proposed urban growth boundary requires inclusion of lower priority lands in order to include or to provide services to higher priority lands.

- **Urban form is a consideration in deciding where to expand the UGB.** Expanding onto areas adjacent to the existing UGB will be more efficient and provide better urban form than areas east of I-5 or UGB study areas 3 and 4.

**Recommendation:**

1. **UGB expansion study areas 5 and 6 provide the best opportunity for developing an efficient urban form.** The City will probably incorporate all or significant portions of study area 5 into its UGB. Adding lands in UGB study area 6 will round out the boundaries and allow better opportunities for urban services to be extended to lands in area 5.
- **The City does not have enough land of any type to accommodate growth in the 2025-2050 period.** ECO identified a total land need for 340 acres between 2025 and 2050; 240 acres of residential land, about 6 acres of commercial and industrial land, and 94 acres of parks, public and semi-public lands.

**Recommendations:**

1. **The City should develop a system of Urban Reserve Areas.** This study not only reviewed land needs for the 2002-2025 period, but to 2050. OAR 660-021 allows cities to establish Urban Reserve Areas (URAs). The intent of URAs is to allow planning for areas outside urban growth boundaries for eventual inclusion in an urban growth boundary and to protect such lands from patterns of development that would impede urbanization. The rules for identifying and establishing URAs are described in OAR 660-021-0030, and generally following the requirements of ORS 197.298 and Goal 14.
2. **Consider URAs that foster existing development patterns.** Add the remaining 125 acres of UGB study area 6 and the 28-acre resource land area in UGB study area 5. Consider adding the remaining lands in UGB study area 1. Add lands in UGB study area 7 or 8 for the employment land need for the 2025-2050 planning period.

# Summary of UGB Study Areas

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## BACKGROUND

The buildable land inventory and assessment of its future land needs presented in the body of this report, concluded that an additional 162 acres of gross vacant buildable land beyond the current urban growth boundary would be necessary in order to serve the city's anticipated growth to the year 2025. An additional 392 acres will need to be added to the Coburg UGB to accommodate forecasted growth between 2025 and 2050.

Statewide planning Goals 9, 10 and 14 all require cities to provide a 20-year supply of buildable land within urban growth boundaries (UGBs). The process and criteria for justifying an expansion of an existing urban growth boundary are found in several State planning laws and goals. Most important to this process are those found in Oregon Revised Statute 197.298 (Priority of land to be included within urban growth boundary), Goal 2 (Exceptions process), and Goal 14 (Urbanization).

This appendix provides background data intended to inform the City's policy decisions about what lands are most appropriate for inclusion in a 2025 UGB and 2050 Urban Reserve Areas. This appendix is not intended to provide the necessary findings for the City's UGB expansion or to identify which areas are most appropriate for inclusion in the UGB. The policy decisions with respect to the UGB expansion and other measures required by state law will be addressed in a future project.

## METHODS

The buildable lands analysis determined that Coburg has 108 acres of vacant buildable land, far less than needed for the planning period.<sup>1</sup> To provide for the unmet future need, Coburg must inventory and assess the lands that surround its current boundary to determine those lands that are most appropriate to accommodate future urban development, consistent with Goal 14 and the City's plan policies.

In determining which lands to consider, State statute provides a specific list of priorities that cities must follow. This list, found in ORS 197.298, requires the city look first to "exception land" (land already partially urbanized, land with poor soils for agriculture, or reduced lot size) before considering farm or forest land. More specifically, this statute requires cities to consider lands in the following sequence:

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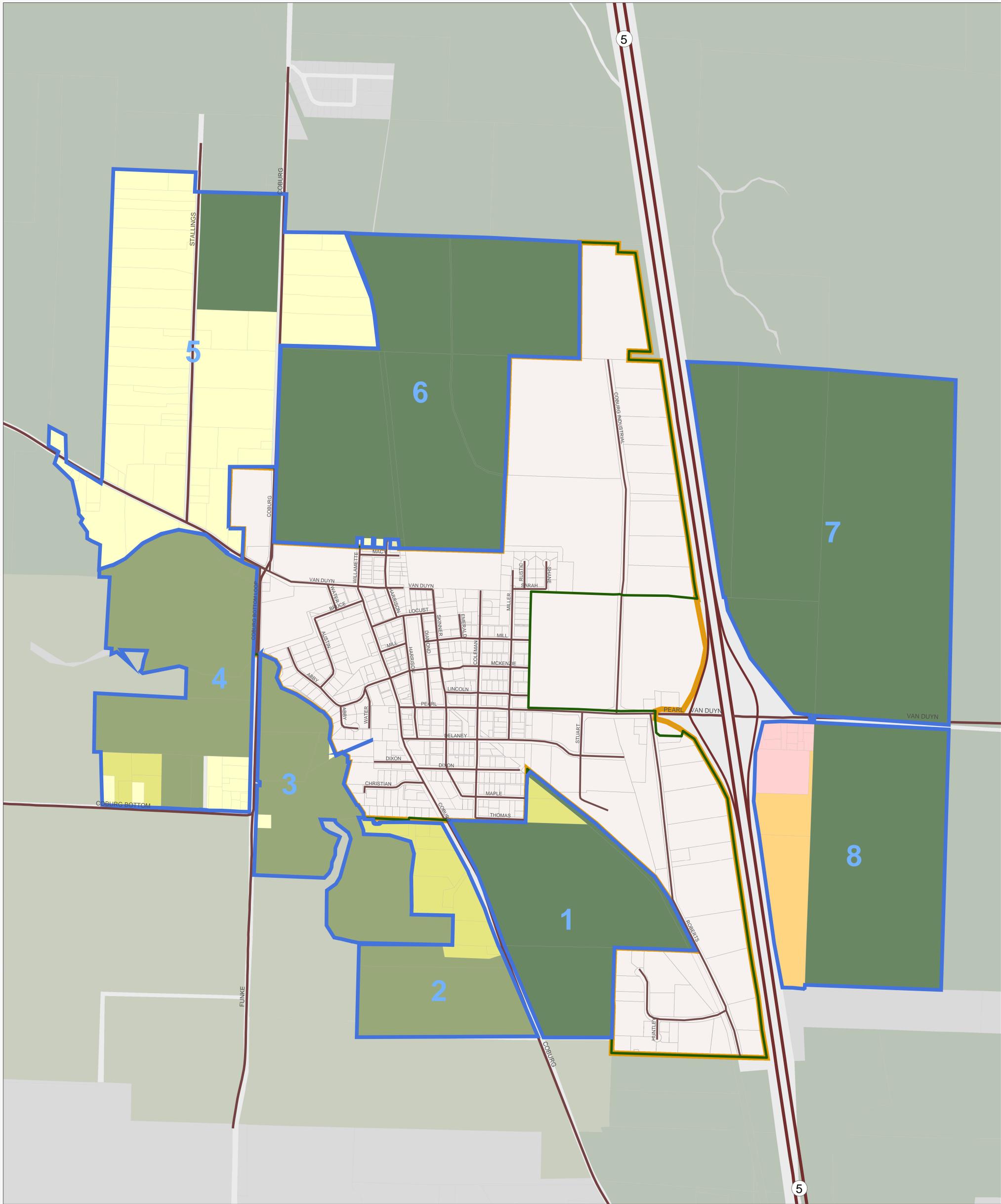
<sup>1</sup> Of these, 59 acres are designated for residential use, 30 acres for commercial use, and 19 acres for industrial use.

1. Established Urban Reserves;
2. Exception land, and farm or forest land (other than high value farm land) surrounded by exception land;
3. Marginal lands designated pursuant to ORS 197.247;
4. Farm and forest land.

The purpose of statewide planning Goal 14 is to “provide for an orderly and efficient transition from rural to urban land use. To accomplish this, statewide planning Goal 14 establishes seven criteria for evaluating UGB expansions:

1. Demonstrated need to accommodate long-range urban population growth requirements consistent with LCDC goals;
2. Need for housing, employment opportunities, and livability;
3. Orderly and economic provision for public facilities and services;
4. Maximum efficiency of land uses within and on the fringe of the existing urban area;
5. Environmental, energy, economic and social consequences;
6. Retention of agricultural land as defined, with Class I being the highest priority for retention and Class VI the lowest priority; and,
7. Compatibility of the proposed urban uses with nearby agricultural activities.

This study identifies eight UGB expansion study areas that ring the existing Coburg UGB. For each of the sub-areas the City has provided a general site description, buildable lands and development patterns analysis, inventory of available utilities, and discussion of factors influencing future urbanization. Those sub-area descriptions follow. Map A-1 shows the location and boundaries of each of the UGB study areas.



# UGB Study Areas - Zoning

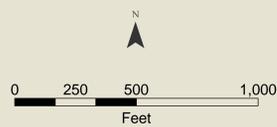
## Buildable Land Inventory

### City of Coburg

#### Oregon

#### Zoning Classification

- |   |     |   |                       |
|---|-----|---|-----------------------|
|  | E30 |  | Tax Lots              |
|  | E40 |  | Urban Growth Boundary |
|  | R   |  | City Limit            |
|  | RC  |  | UGB Area              |
|  | RPR |   |                       |
|  | RR2 |   |                       |
|  | RR5 |   |                       |



## SUMMARY DATA FOR UGB EXPANSION STUDY AREAS

Table A-1 summarizes basic parcelization and zoning characteristics of the eight UGB expansion study areas. In total, the study areas include more than 1,000 acres adjacent to the existing UGB. The study areas include all lands zoned as exceptions that are adjacent to the existing UGB.

Table A-1 shows that the average lot size of parcels in resource zones (lands zoned for exclusive farm use) are larger than those in exceptions zones (lands zoned for rural residential use). This is not surprising; the resource zones have larger minimum lot size and less development than the exceptions areas.

Table A-1 also shows the development capacity of lands in exceptions areas and resource areas. In total, land in exceptions zones have an estimated development capacity of approximately 555 dwelling units. The capacity estimates are based on a density of 3.0 dwelling units per gross residential acre (a gross density of about 4.0 dwelling units per net acre).<sup>2</sup> Coburg needs land for approximately 900 new dwelling units between 2002 and 2025. The housing capacity in exceptions lands and areas within the UGB may be insufficient to meet the City's need, thus, Coburg may have justification to bring some agricultural land into the UGB. The City must consider the seven Goal 14 factors when evaluating which resource lands to include in an expanded UGB.

Table A-1 also shows the capacity for employment in study areas 1, 7 and 8. These areas were identified as areas for employment expansion during community workshops. The City, however, has made a policy decision not to add land for employment during the 2002-2025 period.

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<sup>2</sup> ECO used a density assumption of 3.0 dwelling units per net acre to reflect the realities of developing exceptions areas. The lower density assumption is justified by parcelization patterns, lot sizes, access, and development constraints.

**Table A-1. Summary of UGB expansion study areas**

Variable	UGB Expansion Study Area							
	1	2	3	4	5	6	7	8
Tax Lots	5	15	8	24	56	7	3	13
Total Acres	94.5	64.6	74.1	108.9	199.8	208.8	239.9	141.8
<b>Exceptions Zones</b>								
Tax Lots	2	13	3	17	55	3	0	11
Acres	4.4	22.7	0.8	16.6	171.7	0.8	0.0	36.1
Dwelling units	2	8	1	11	39	2	0	0
Developed acres	1.0	4.0	0.5	5.5	19.5	0.8	0.0	36.1
Vacant acres	3.4	18.7	0.3	11.1	152.2	0.0	0.0	0.0
DU Capacity (@3 DU/GA)	10	56	0	33	456	0	0	0
<b>Resource Zones</b>								
Tax Lots	3	2	5	7	1	4	3	2
Acres	90.2	41.8	73.3	92.3	28.1	208.0	239.9	105.7
Dwelling units	1	1	1	0	4	4	0	0
Developed acres	0.5	0.5	0.5	0.0	2.0	2.0	0.0	0.0
Vacant acres	89.7	41.3	72.8	92.3	26.1	206.0	239.9	105.7
DU Capacity (@6.5 DU/GA)	582	268	472	600	169	1338	1559	687
Emp Capacity (@20 Emp/GA)	1793	NA	NA	NA	NA	NA	4797	2114

Source: LCOG Assessment data; analysis by ECONorthwest

Statewide planning Goal 14 identifies seven factors cities must consider when evaluating lands of UGB expansions. Factor 6 addresses retention of agricultural land “with Class I being the highest priority for retention and Class VI the lowest priority.”

Table A-2 shows soil class by UGB study area. Study areas 1, 4, 5, and 6 have Class 1 soils present within lands zoned for resource uses. With the exception of study area 8, all of the study areas have Class 2 soils present. Study areas 7 and 8 have significant percentages of Class 4 or higher soils.

**Table A-2. Summary of soil class by UGB study area and zoning**

Study		Soil Class								Total
Area	Zone	1	2	3	4	5	6	7	8	
<b>Acres</b>										
1	E40	9.5	71.5		4.5				4.7	90.2
2	E30		39.4		2.4					41.8
3	E30		73.3							73.3
4	E30	2.9	89.4							92.3
5	E40	18.7	9.4							28.1
6	E40	63.6	138.5		5.9					208.0
7	E40		5.6		230.7			3.7		239.9
8	E40			2.2	53.2			50.3		105.7
<b>Percent of Acres</b>										
1	E40	11%	79%	0%	5%	0%	0%	0%	5%	100%
2	E30	0%	94%	0%	6%	0%	0%	0%	0%	100%
3	E30	0%	100%	0%	0%	0%	0%	0%	0%	100%
4	E30	3%	97%	0%	0%	0%	0%	0%	0%	100%
5	E40	67%	33%	0%	0%	0%	0%	0%	0%	100%
6	E40	31%	67%	0%	3%	0%	0%	0%	0%	100%
7	E40	0%	2%	0%	96%	0%	2%	0%	0%	100%
8	E40	0%	0%	2%	50%	0%	48%	0%	0%	100%

Source: Rural Lands Database; analysis by InfoGraphics Lab and ECONorthwest

Not all lands within the UGB will be appropriate for development. Coburg should be concerned about areas in wetlands and floodplains as it determines where to expand its UGB. No significant areas with steep slopes exist in any of the UGB study areas. Coburg presently allows development within floodplains provided that the development meets the Federal Emergency Management Agency's (FEMA) and other applicable standards. Development in identified wetlands may be subject to permitting processes through the Army Corps of Engineers and the Division of State Lands.

Table A-3 summarizes combined flood and wetland constraints by UGB study area and zone (exceptions and resource zones). Map A-3 shows the extent of the constraints. The data show that UGB study areas 2 and 3 are substantially within the identified 100-year floodplain. Because of this fact and elevation differences of UGB study areas 2 and 3, ECO recommends eliminating these areas from further consideration for UGB expansion.

**Table A-3. Summary of floodplain and wetland by UGB study area and zone**

Study Area	Resource Zones			Exceptions Zones			Total Acres (all)
	Const Acres	Unconst Acres	Total Acres	Const Acres	Unconst Acres	Total Acres	
1	16.3	73.8	90.2	0.0	4.4	4.4	94.5
2	5.7	36.1	41.8	14.0	8.7	22.7	64.6
3	59.3	14.0	73.3	0.6	0.2	0.8	74.1
4	59.7	32.7	92.3	6.9	9.7	16.6	108.9
5	0.0	28.1	28.1	2.0	169.8	171.7	199.8
6	7.0	201.0	208.0	0.0	0.8	0.8	208.8
7	23.3	216.6	239.9	0.0	0.0	0.0	239.9
8	0.0	105.7	105.7	8.0	28.1	36.1	141.8

Source: LCOG Assessment data; analysis by ECONorthwest

## STUDY AREA 1

Study area 1 includes lands south of the existing UGB, east of Coburg Road and West of Roberts Road. The eastern edge of the study area is bounded by the old Southern Pacific Railroad right-of-way. The area is contiguous with the existing UGB on three sides. The study area includes approximately 95 acres in five parcels. The study area is nearly 2,000 feet from east to west, and about 2,800 feet from north to south.

More than 90 acres of the site is zoned for agricultural uses (E-40), with 4.4 acres designated RR-2 (an exception area). Three dwelling units exist on the site as well as a few farm-related structures. The land is largely in active farm uses. Topographically, the site is largely flat. While no identified wetlands exist on the site, about 16 acres of the site are in flood zone A (the 100-year floodplain).

Lands zoned for agricultural use in the study area are most Class 1 or 2 soils. Of the 90 acres zoned for agricultural use in the study area, 9.5 acres have Class 1 soils, and 71.5 acres are identified as Class 2 soils.

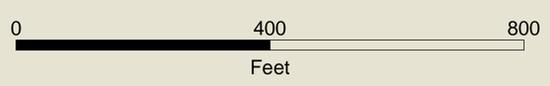
Study area 1 appears relatively easy to service due to its flat topography. The site is a few feet lower than areas just to the north. A pump station would be required, however, to move sewage from the area to the treatment plant on the north end of Coburg. Water service would be relatively easy to extend to the site, as would electrical.

Transportation to the site would be from Roberts Road on the east and Willamette Street on the West. Opportunities exist to extend Coleman and Thomas Streets into the study area.

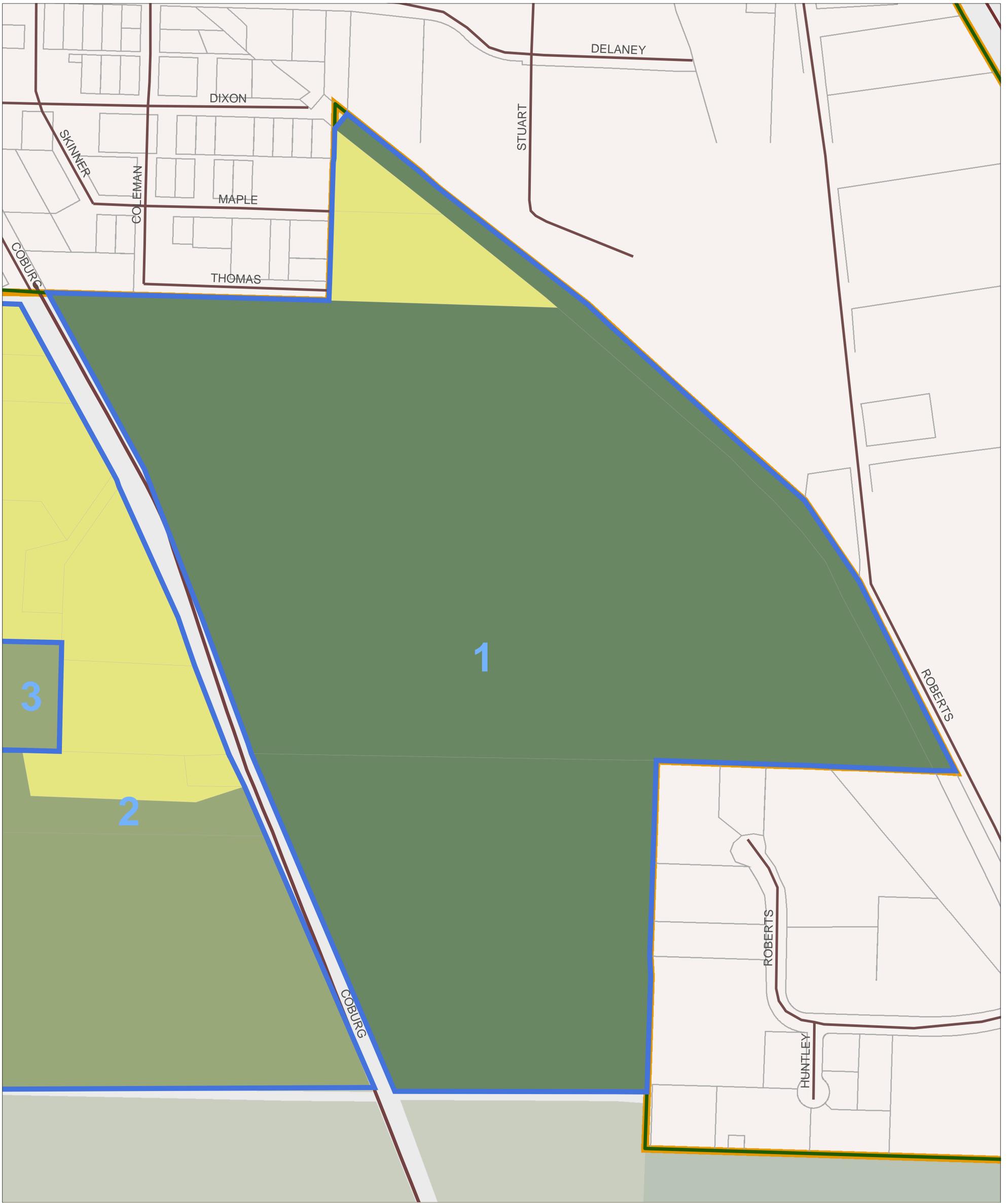


**UGB Study Area 1**  
**Buildable Land Inventory**  
**City of Coburg**  
**Oregon**

- City Limits
- Current UGB
- UGB Study Areas



UO InfoGraphics lab, Department of Geography  
 Cartography/GIS: Ken Kato, Jesse Manley, January 2004.



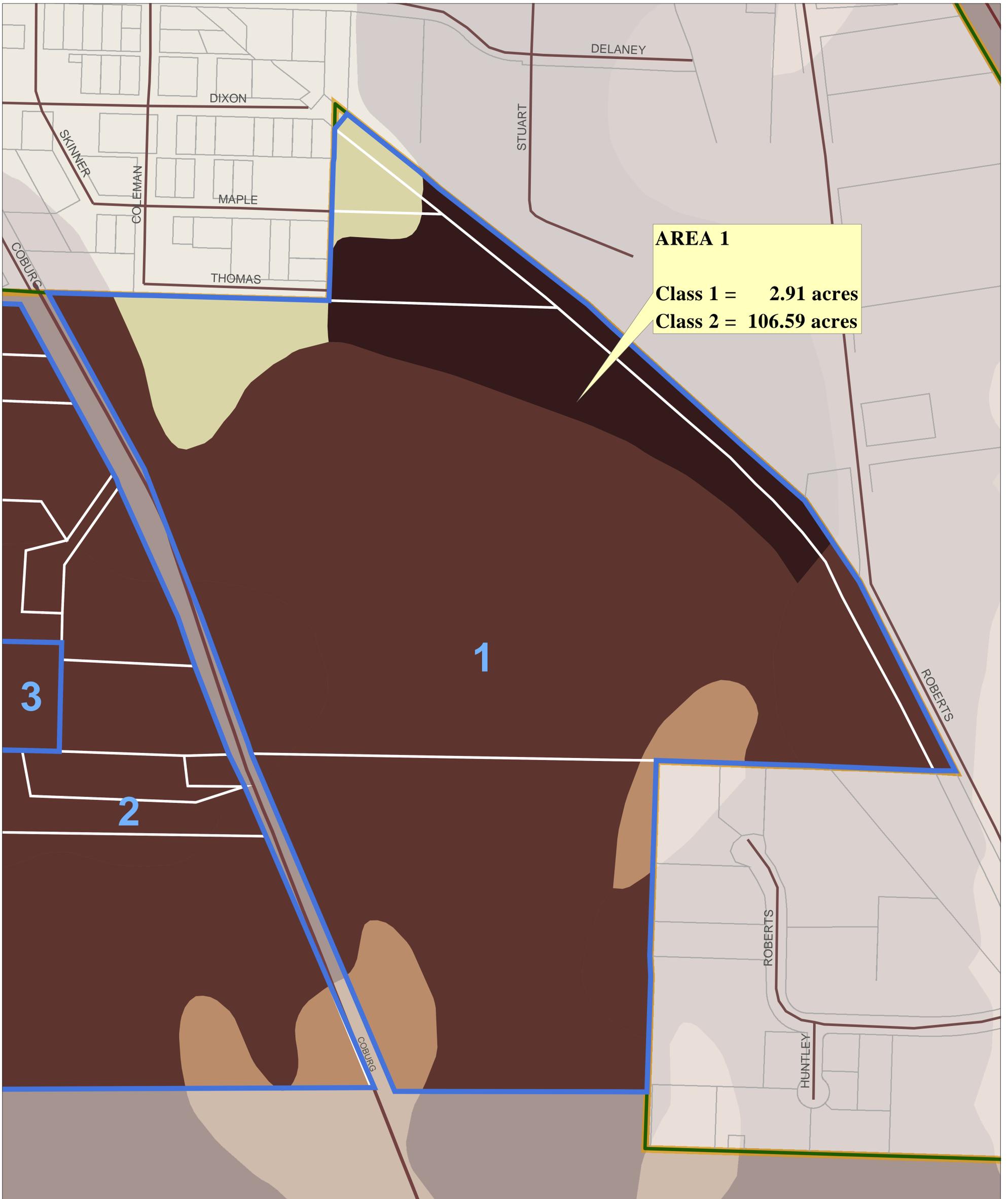
**UGB Study Area 1 - Zoning  
Buildable Land Inventory  
City of Coburg  
Oregon**

**Zoning Classification**

- E30
- E40
- R
- RC
- RPR
- RR2
- RR5

- Tax Lots
- Current UGB
- City Limits
- UGB Study Areas



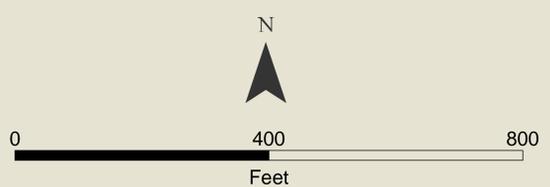


**AREA 1**  
 Class 1 = 2.91 acres  
 Class 2 = 106.59 acres

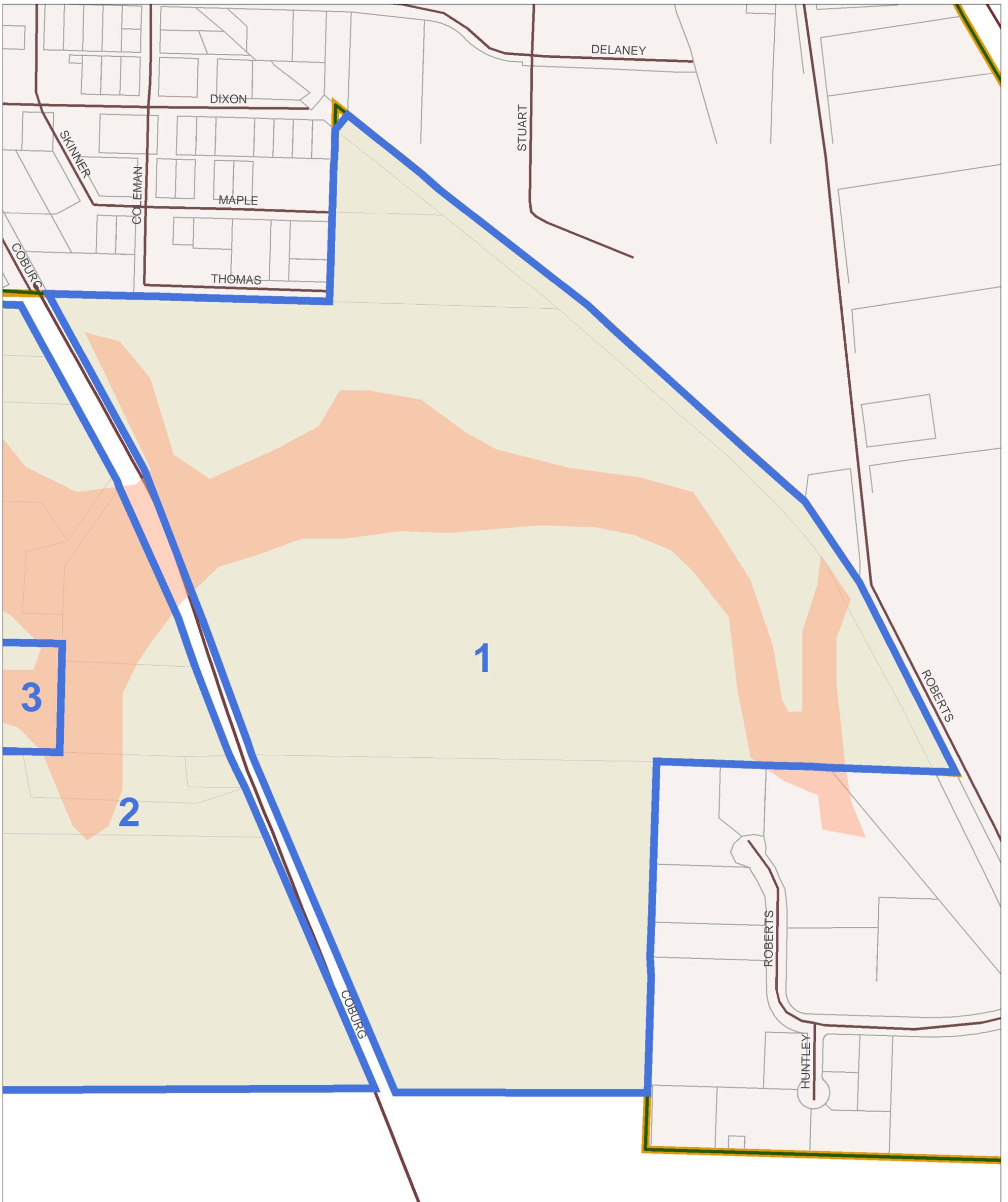
**UGB Study Area 1 - Soils**  
**Buildable Land Inventory**  
**City of Coburg**  
**Oregon**

**Soil Capability Classification**

- Class 1
  - Class 2
  - Class 3
  - Class 4
  - Class 5
  - Class 6
  - Class 7
  - Class 8
- Tax Lots
  - Current UGB
  - City Limits
  - UGB Study Areas



UO InfoGraphics lab, Department of Geography  
 Cartography/GIS: Ken Kato, Jesse Manley, January 2004.



**UGB Study Area 1 - Constrained Lands**  
**Buildable Land Inventory**  
**City of Coburg**  
**O r e g o n**

- |  |   |
|--|---|
|  National Wetland Inventory |  Tax Lots        |
|  100 Year Floodway          |  Current UGB     |
|  |  City Limits     |
|  |  UGB Study Areas |



## STUDY AREA 2

Study area 2 includes lands south of the existing UGB, west of Coburg Road and east of Funke Road. The area is contiguous with the existing UGB only on the north side. The study area includes approximately 64 acres in 16 parcels. The study area is nearly 750 feet from east to west, and about 1,600 feet from north to south.

More than 40 acres of the site is zoned for agricultural uses (E-30), with about 22 acres designated for rural residential uses (an exception area). Nine dwelling units exist in the study area, eight of which are located in exceptions areas. There is also a religious facility in the exceptions area. The land is largely in active farm uses. Topographically, the site is largely flat. About 20 acres of the site are in flood zone A (the 100-year floodplain), of these, 14 acres are within exceptions areas—areas where most of the development in the study area exists.

Of the 42 acres in this study area zoned for agricultural use, 39.4 are in Class 2 soils.

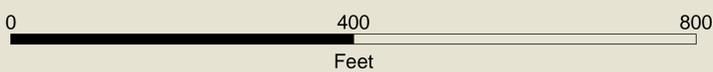
Study area 2 appears relatively easy to service due to its flat topography. The site is a few feet lower than areas just to the north. A pump station would be required, however, to move sewage from the area to the treatment plant on the north end of Coburg. Water service would be relatively easy to extend to the site, as would electrical.

Transportation access could be provided from Willamette Street on the West. If just the exceptions areas were included in the UGB, it would be difficult to provide access from any place other than Willamette Street. However, the City could consider extending a street through the site and providing rear access to parcels.

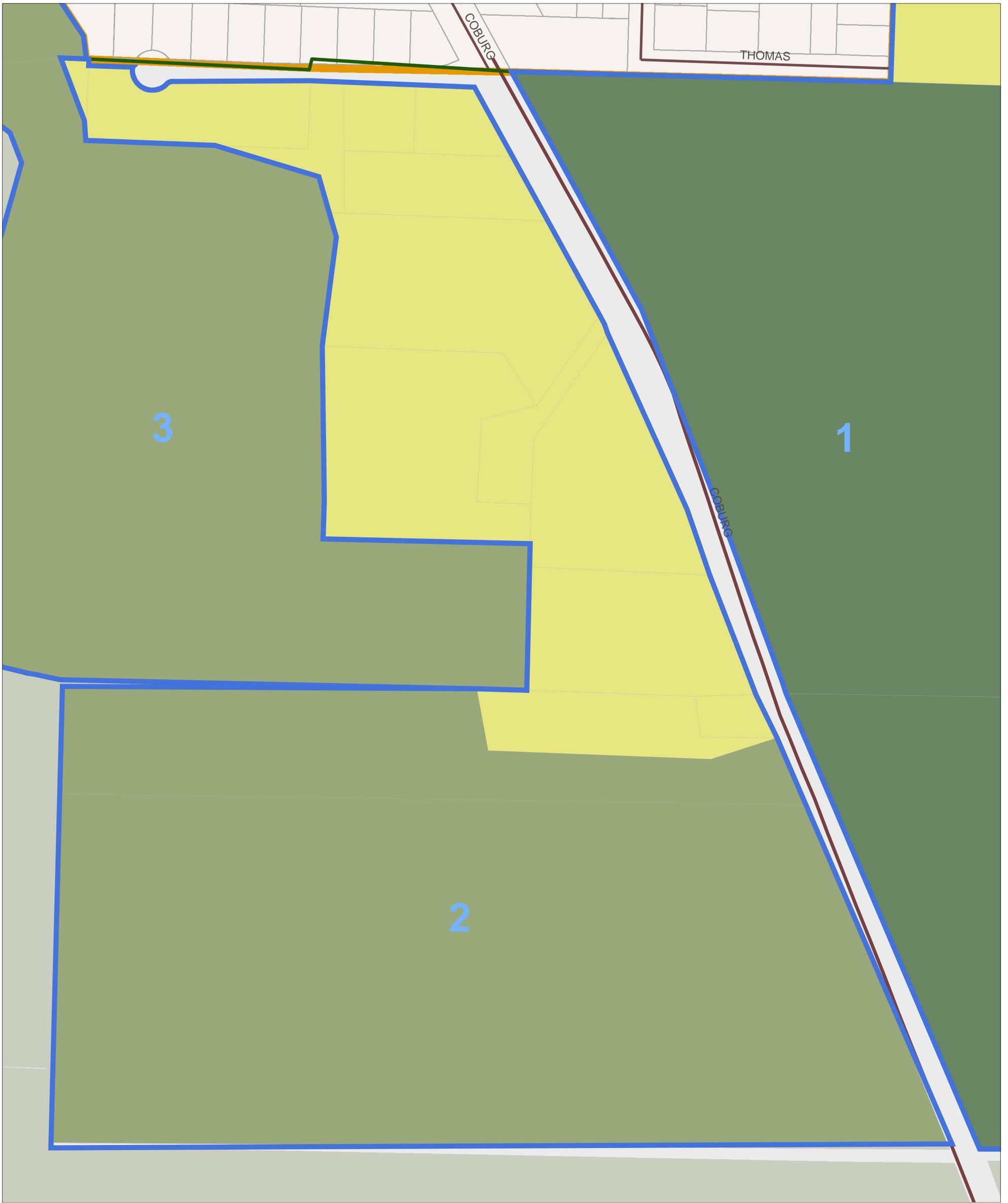


**UGB Study Area 2**  
**Buildable Land Inventory**  
**City of Coburg**  
**Oregon**

- City Limits
- Current UGB
- UGB Study Areas



SA 2 Map 2

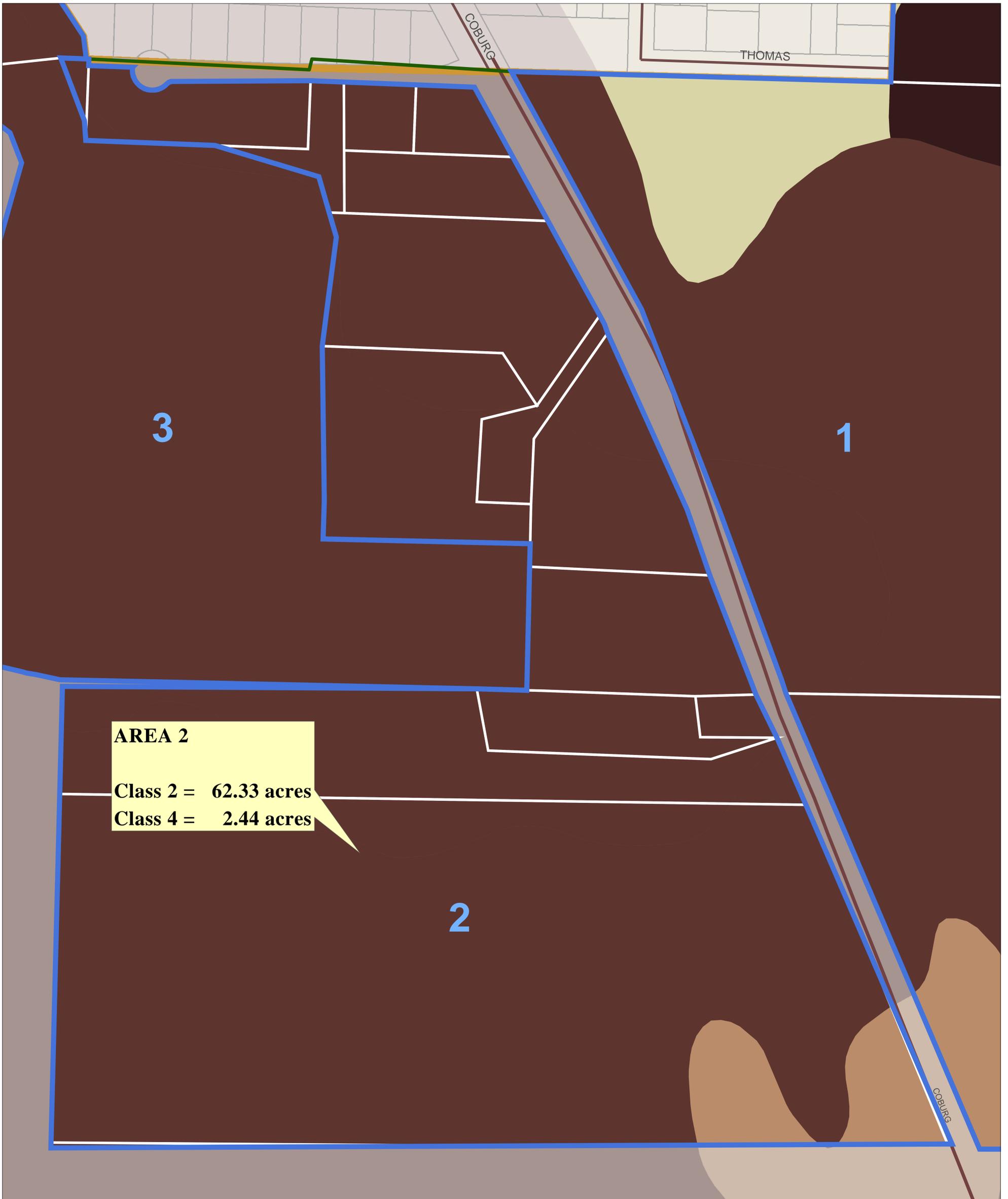


**UGB Study Area 2 - Zoning  
Buildable Land Inventory  
City of Coburg  
Oregon**

**Zoning Classification**

- |   |     |   |                 |
|---|-----|---|-----------------|
|  | E30 |  | Tax Lots        |
|  | E40 |  | Current UGB     |
|  | R   |  | City Limits     |
|  | RC  |  | UGB Study Areas |
|  | RPR |   |                 |
|  | RR2 |   |                 |
|  | RR5 |   |                 |





**AREA 2**  
 Class 2 = 62.33 acres  
 Class 4 = 2.44 acres

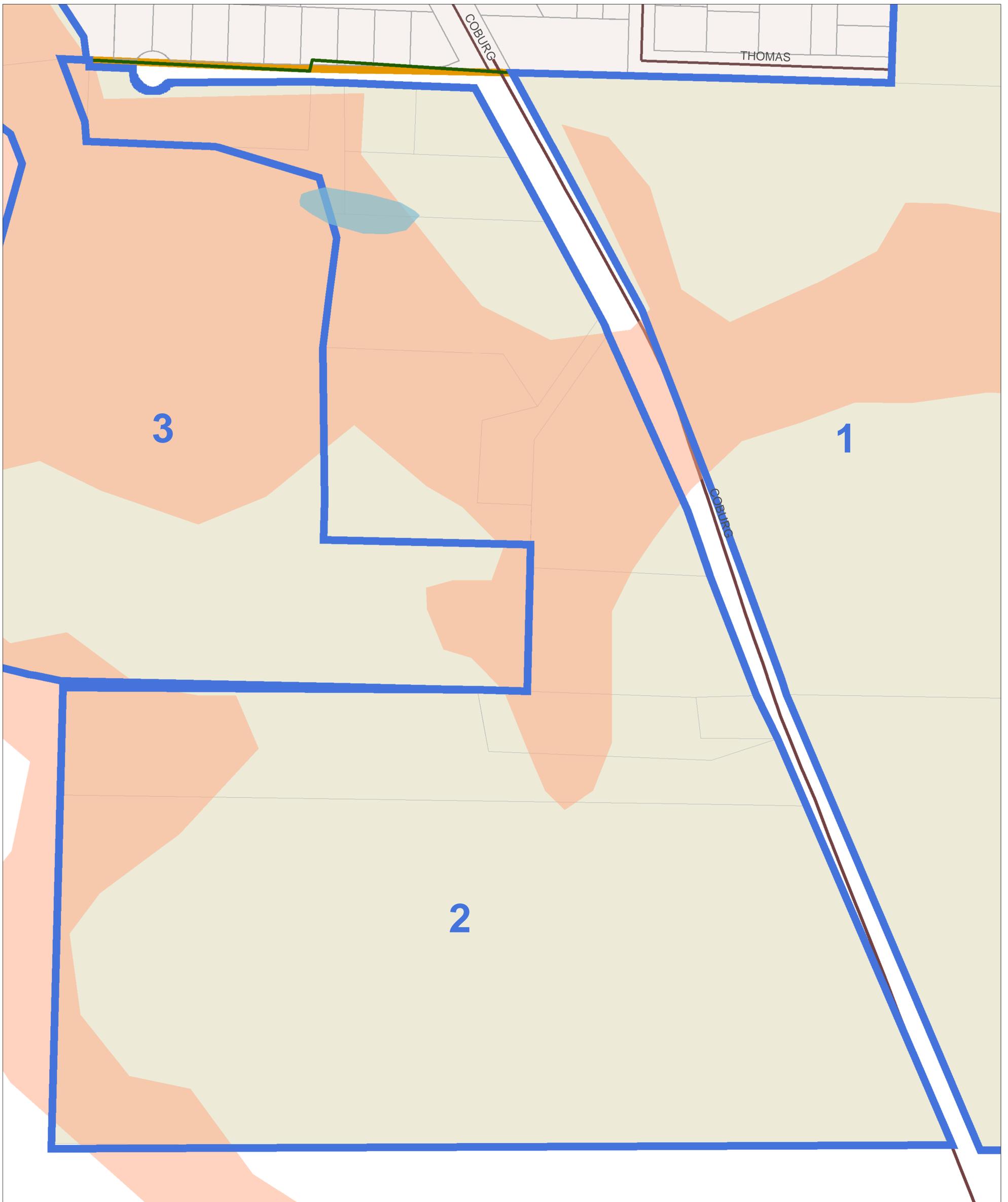
**UGB Study Area 2 - Soils**  
**Buildable Land Inventory**  
**City of Coburg**  
**Oregon**

**Soil Capability Classification**

- Class 1
  - Class 2
  - Class 3
  - Class 4
  - Class 5
  - Class 6
  - Class 7
  - Class 8
- Tax Lots
  - Current UGB
  - City Limits
  - UGB Study Areas



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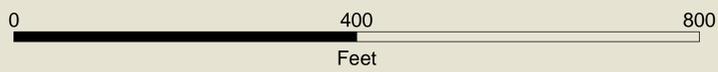
## UGB Study Area 2 - Constrained Lands

### Buildable Land Inventory

City of Coburg

O r e g o n

- |  |   |
|--|---|
|  National Wetland Inventory |  Tax Lots        |
|  100 Year Floodway          |  Current UGB     |
|  |  City Limits     |
|  |  UGB Study Areas |



## STUDY AREA 3

Study area 3 includes lands south and west of the existing UGB, west of Coburg Road. The area is contiguous with the existing UGB on the northeast side. The study area includes approximately 74 acres in 8 parcels. The study area is nearly 1,800 feet from east to west, and about 2,500 feet from north to south.

The majority of the study area (73.3 acres) zoned for agricultural uses (E-30), with only one lot for rural residential uses. Agricultural lands in the study area are in orchards and other crops. Only two dwelling units exist in the study area, one of which is located in the exceptions area. Topographically, the site is largely flat. However, the site is several feet lower than the remainder of Coburg and is separated from the UGB by a vegetative buffer. The majority of the site (60 acres) is in flood zone A (the 100-year floodplain). Between the elevation difference and areas in the floodplain, this study area presents significant development constraints.

All of the 73.3 acres zoned for agricultural uses in this study area are identified as Class 2 soil types.

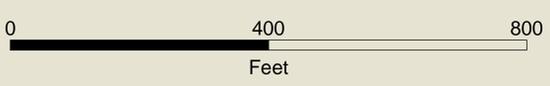
Study area 3 appears more difficult to service due to its elevation. The site is several feet lower than areas to the northeast. A pump station would be required to move sewage from the area to the treatment plant on the north end of Coburg. Water service would be relatively easy to extend to the site, as would electrical.

Transportation access to the site would probably have to come from Coburg Bottom Loop—a County Road that does not directly connect to areas within the Coburg UGB. No other transportation access points are immediately obvious. This study area appears to have significant transportation access limitations.

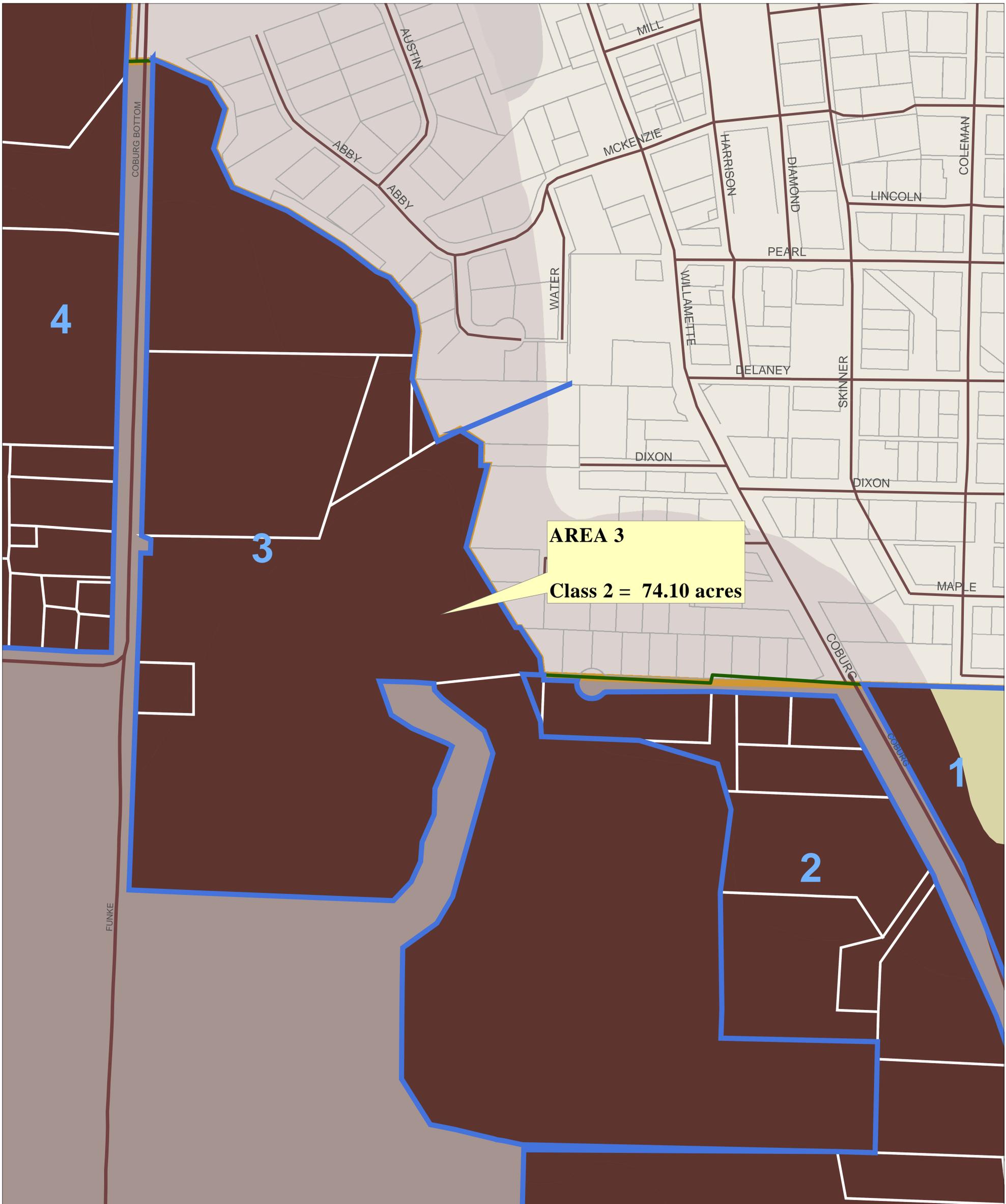


**UGB Study Area 3**  
**Buildable Land Inventory**  
**City of Coburg**  
**Oregon**

- City Limits
- Current UGB
- UGB Study Areas



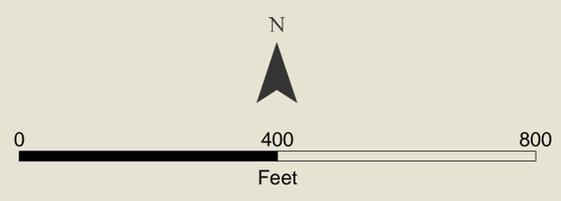
UO InfoGraphics lab, Department of Geography  
 Cartography/GIS: Ken Kato, Jesse Manley, January 2004.



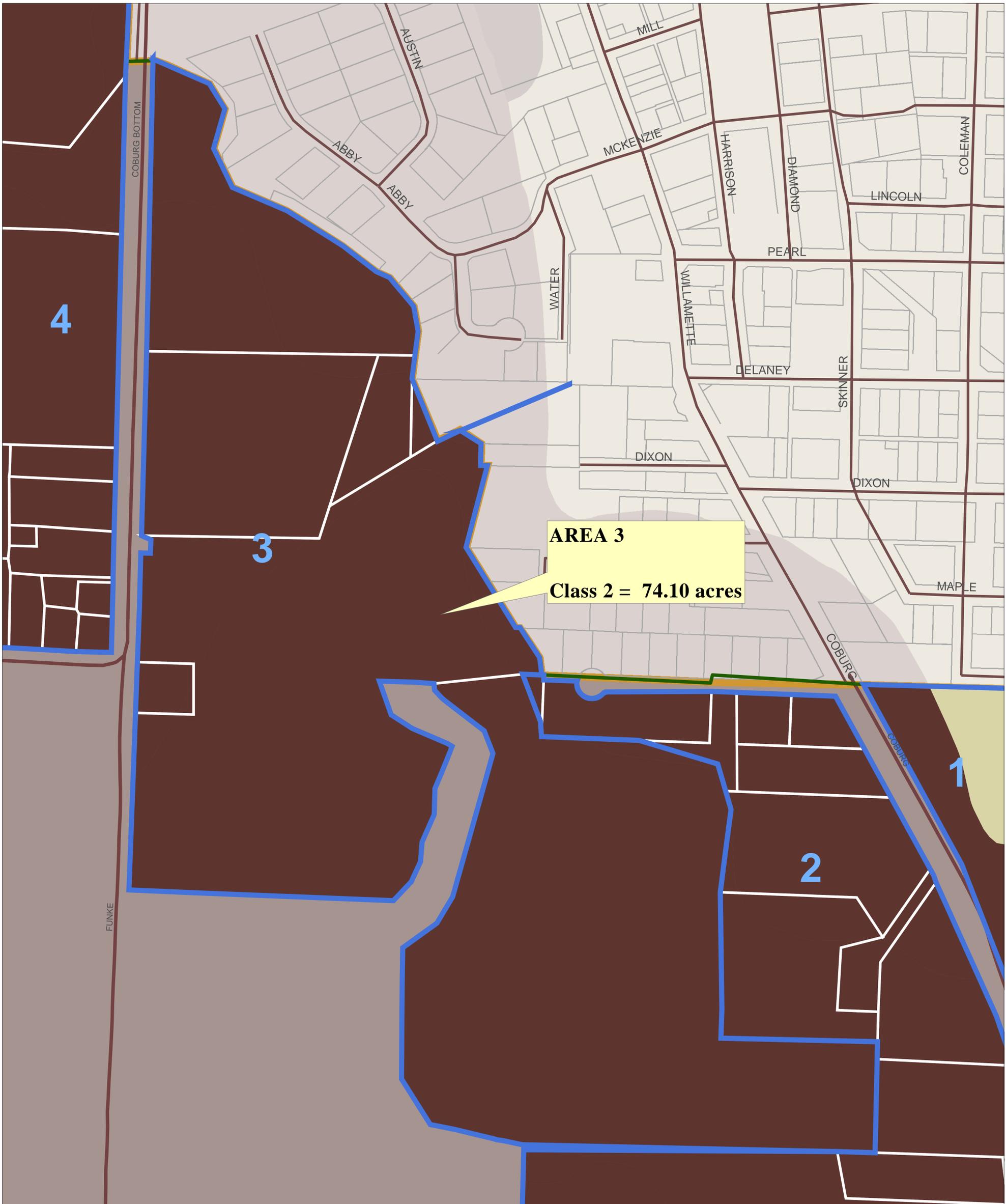
**UGB Study Area 3 - Soils**  
**Buildable Land Inventory**  
**City of Coburg**  
**Oregon**

**Soil Capability Classification**

- |   |         |   |                 |
|---|---------|---|-----------------|
|  | Class 1 |  | Tax Lots        |
|  | Class 2 |  | Current UGB     |
|  | Class 3 |  | City Limits     |
|  | Class 4 |  | UGB Study Areas |
|  | Class 5 |   |                 |
|  | Class 6 |   |                 |
|  | Class 7 |   |                 |
|  | Class 8 |   |                 |



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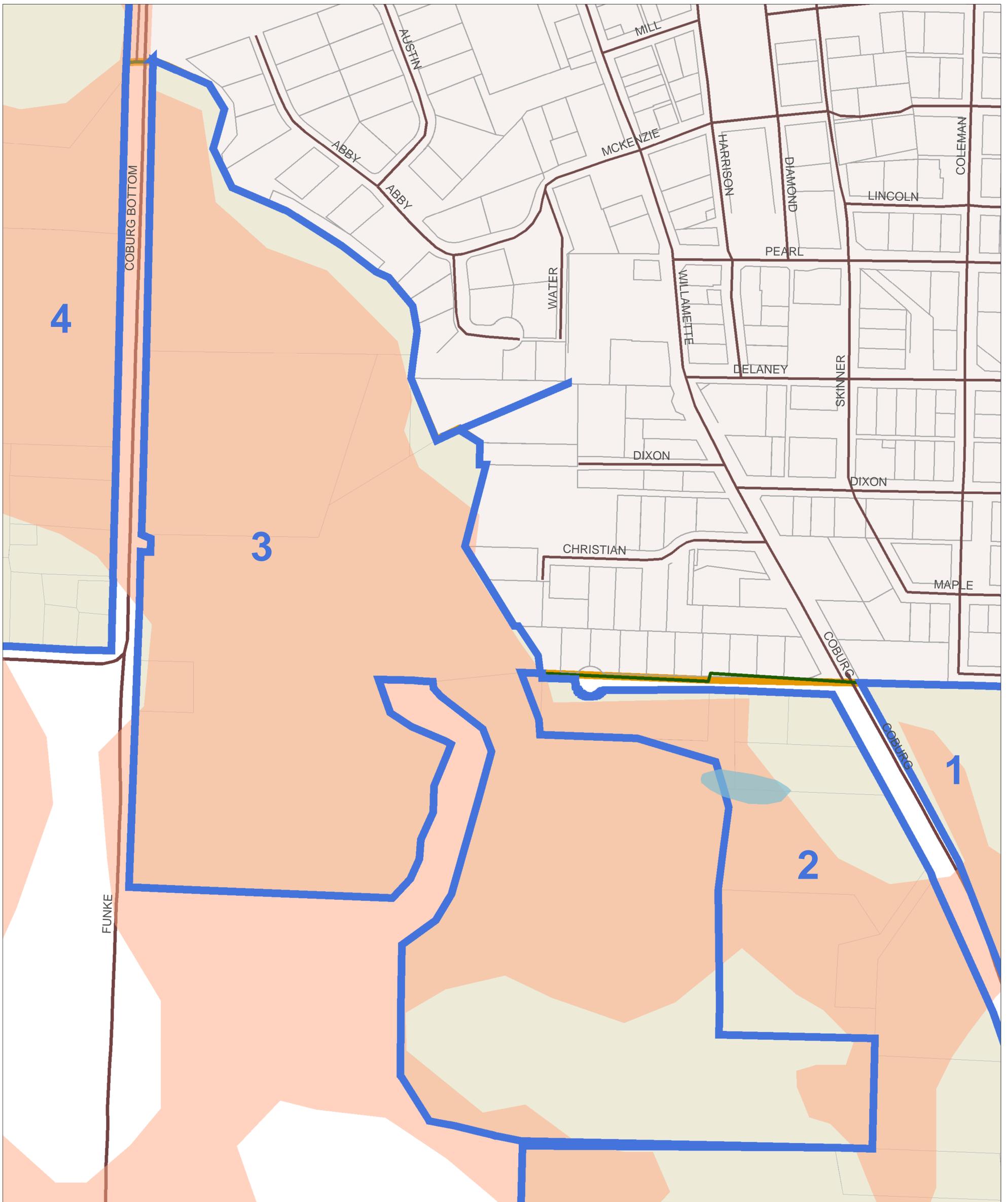
**UGB Study Area 3 - Soils**  
**Buildable Land Inventory**  
**City of Coburg**  
**Oregon**

**Soil Capability Classification**

- Class 1
  - Class 2
  - Class 3
  - Class 4
  - Class 5
  - Class 6
  - Class 7
  - Class 8
- Tax Lots
  - Current UGB
  - City Limits
  - UGB Study Areas



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# UGB Study Area 3 - Constrained Lands

## Buildable Land Inventory

City of Coburg

Oregon

- National Wetland Inventory
- 100 Year Floodway
- Tax Lots
- Current UGB
- City Limits
- UGB Study Areas



## STUDY AREA 4

Study area 4 includes lands west of the existing UGB. The area is contiguous with the existing UGB on the north side and part of the east side. The study area includes approximately 109 acres in 24 parcels. The study area is about 1,700 feet from east to west, and about 3,000 feet from north to south.

The majority of the study area (92.3 acres) zoned for agricultural uses (E-30). About 17 acres are zoned for rural residential uses (RR-2 and RR-5). Agricultural lands in the study area are in orchards and other crops. A total of 11 dwelling units exist in the study area; all of which are located in exceptions areas. Topographically, the site is largely flat. However, much the site is several feet lower than the remainder of Coburg. The majority of the site (67 acres) is in flood zone A (the 100-year floodplain). Between the elevation difference and areas in the floodplain, this study area presents significant development constraints.

Of the 92.3 acres in this study area zoned for agricultural uses, 2.9 acres are in Class 1 soil types and 89.4 acres are identified as Class 2 soil types.

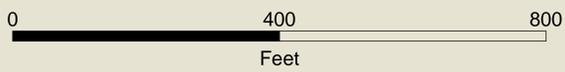
Study area 4 appears more difficult to service due to its elevation. The site is several feet lower than areas to the north and east. A pump station would be required to move sewage from the area to the treatment plant on the north end of Coburg. Water service would be relatively easy to extend to the site, as would electrical.

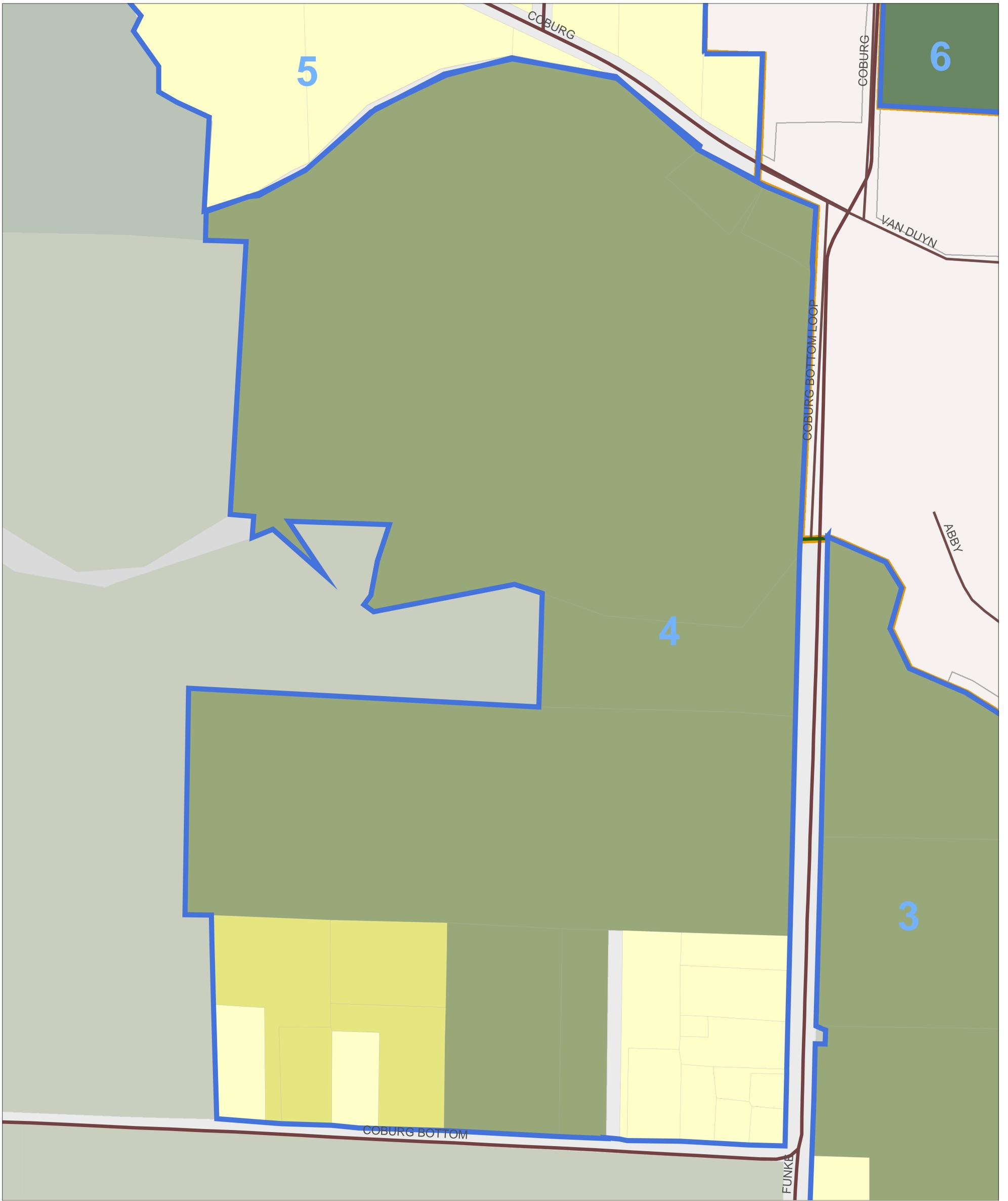
Transportation access to the site would probably have to come from Coburg Bottom Loop—a County Road. Van Duyn Road could provide access from the North.



**UGB Study Area 4**  
**Buildable Land Inventory**  
**City of Coburg**  
**Oregon**

- City Limits
- Current UGB
- UGB Study Areas





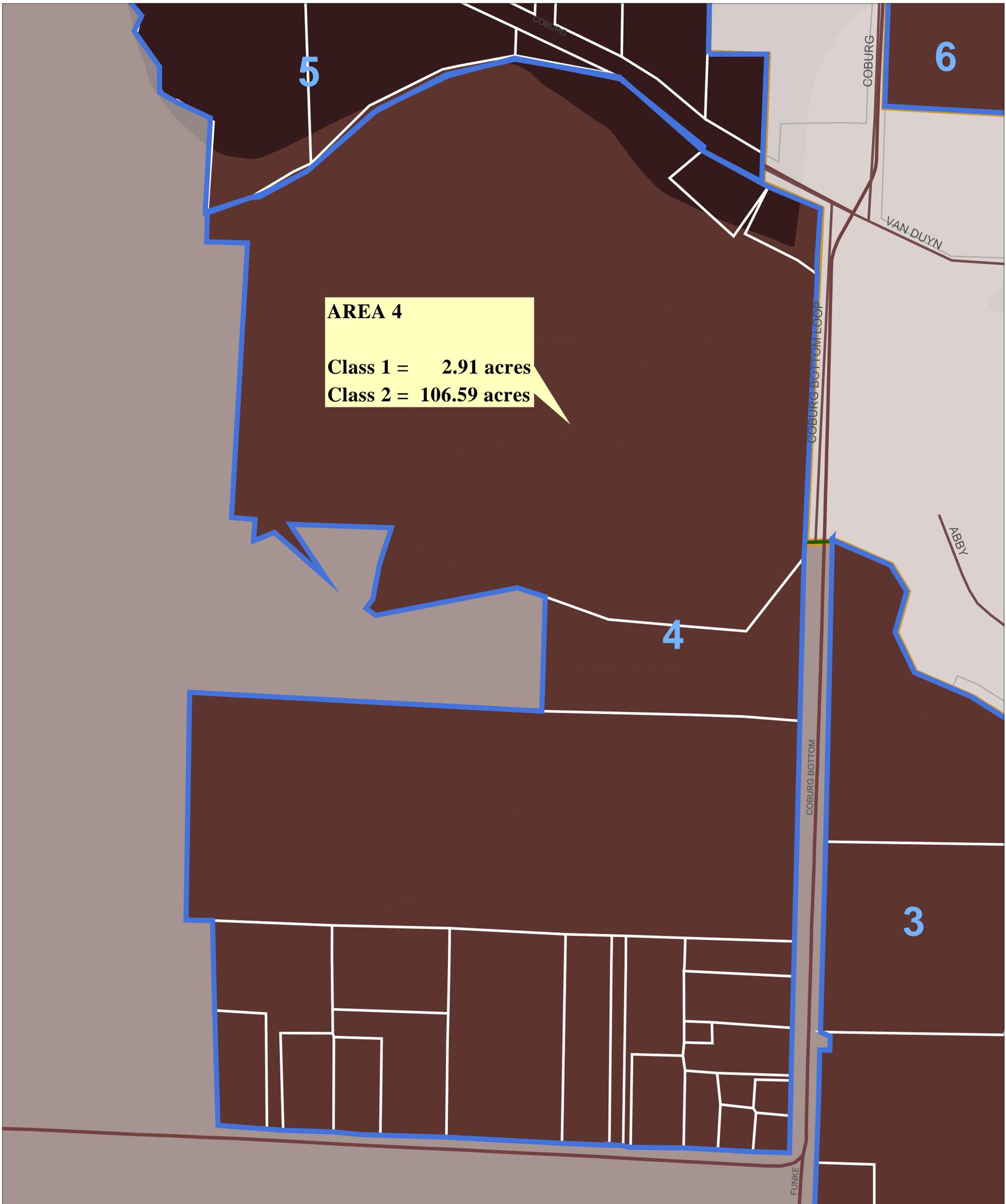
**UGB Study Area 4 - Zoning  
Buildable Land Inventory  
City of Coburg  
Oregon**

**Zoning Classification**

- E30
- E40
- R
- RC
- RPR
- RR2
- RR5

- Tax Lots
- Current UGB
- City Limits
- UGB Study Areas

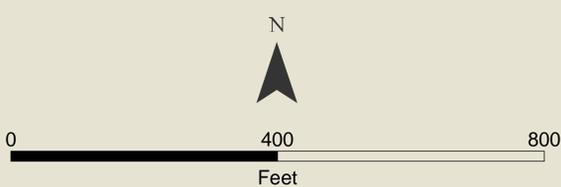




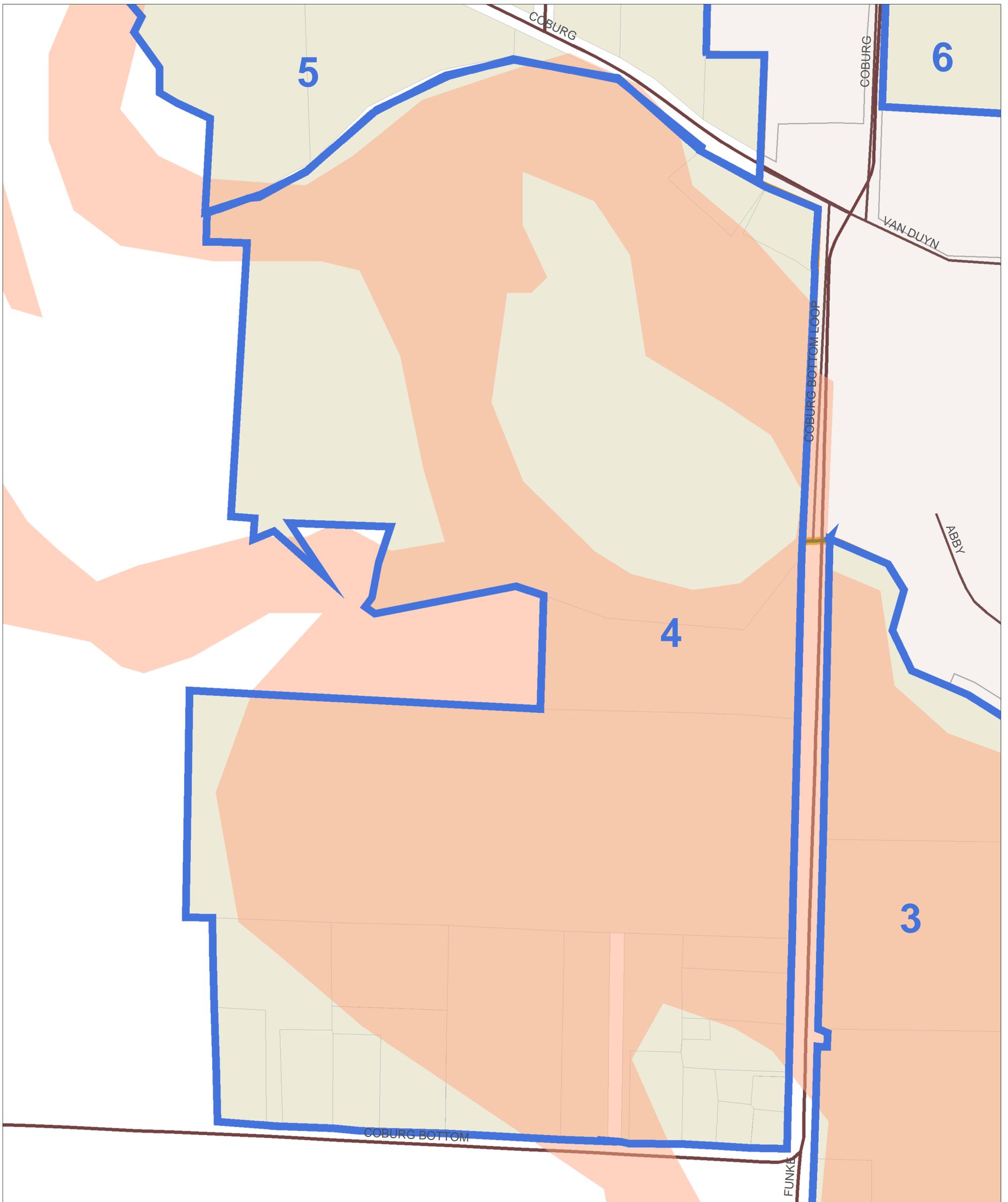
**UGB Study Area 4 - Soils**  
**Buildable Land Inventory**  
**City of Coburg**  
**Oregon**

**Soil Capability Classification**

- |   |         |   |                 |
|---|---------|---|-----------------|
|  | Class 1 |  | Tax Lots        |
|  | Class 2 |  | Current UGB     |
|  | Class 3 |  | City Limits     |
|  | Class 4 |  | UGB Study Areas |
|  | Class 5 |   |                 |
|  | Class 6 |   |                 |
|  | Class 7 |   |                 |
|  | Class 8 |   |                 |

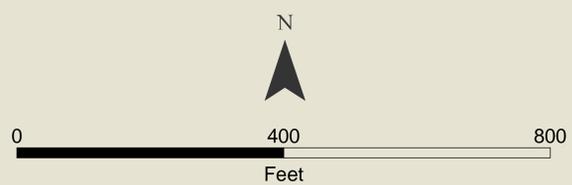


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 Cartography/GIS: Ken Kato, Jesse Manley, January 2004.



**UGB Study Area 4 - Constrained Lands**  
**Buildable Land Inventory**  
**City of Coburg**  
**Oregon**

- National Wetland Inventory
- 100 Year Floodway
- Tax Lots
- Current UGB
- City Limits
- UGB Study Areas



## STUDY AREA 5

Study area 5 includes lands north and west of the existing UGB. The area is contiguous with the existing UGB on part of the east side. The study area includes approximately 200 acres in 56 parcels. The study area is about 2,000 feet from east to west, and about 4,000 feet from north to south.

The majority of the study area (172.3 acres) is in exceptions areas (RR-5 zoning). One tax lot of about 28 acres is in agricultural zoning (E-40). A total of 43 dwelling units exist in the study area; 39 of which are located in exceptions areas. Topographically, the site is largely flat. Only a small area (2.0 acres) in the southwest corner is in the 100-year floodplain. No identified wetlands exist in the areas.

Of the 28.1 acres in this study area zoned for agricultural uses, 18.1 acres are in Class 1 soil types and 9.4 acres are identified as Class 2 soil types.

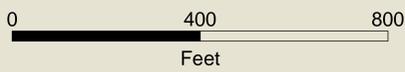
Study area 5 appears relatively easy to service due to its elevation and proximity to the proposed sewage treatment plan. A pump station may be required to move sewage from the area to the treatment plant on the north end of Coburg. Water service would be relatively easy to extend to the site, as would electrical.

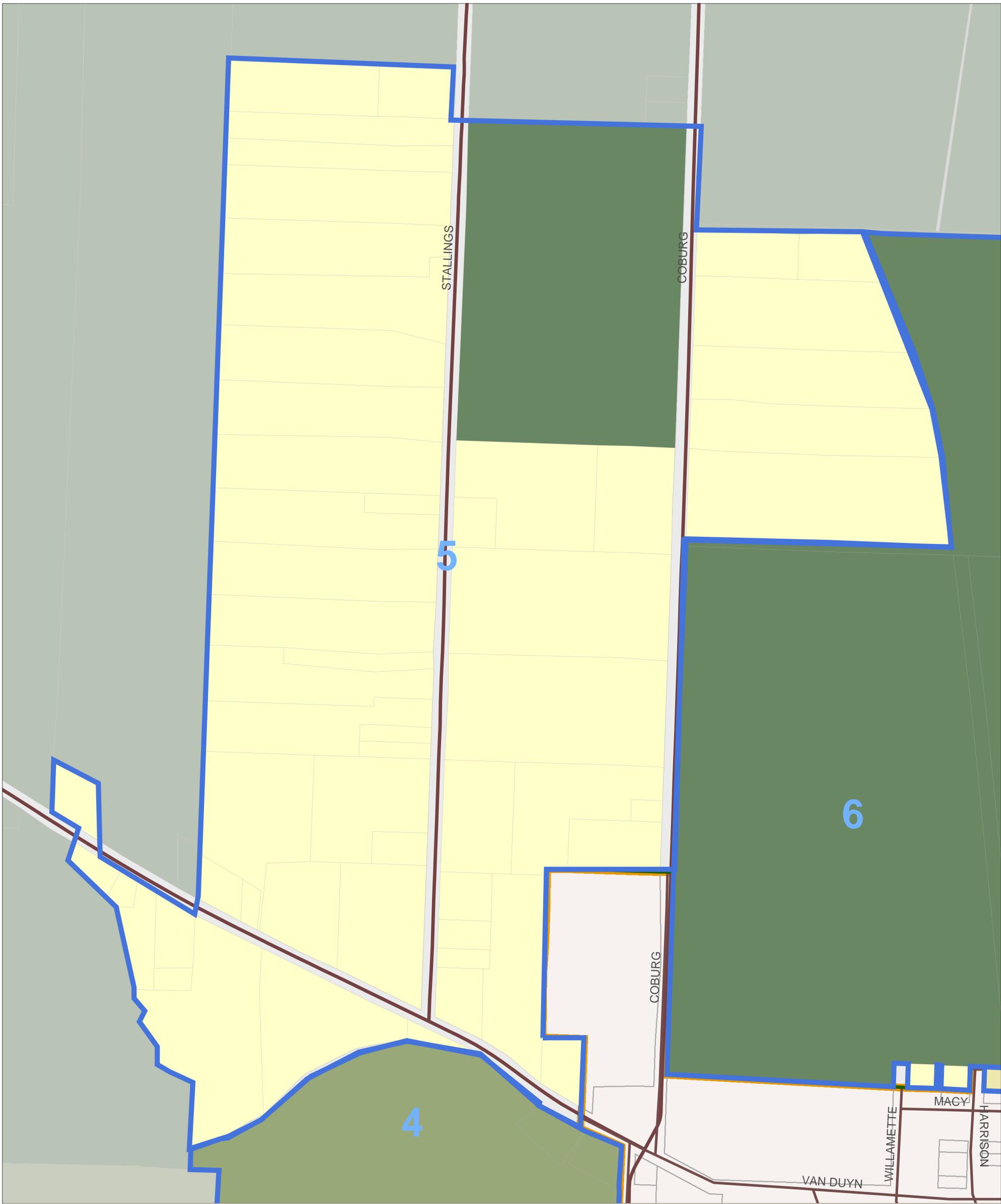
Transportation access to the site would probably have to come from Coburg Road and Stallings Lane. There may be opportunities to provide cross streets to improve access to the area.



**UGB Study Area 5**  
**Buildable Land Inventory**  
**City of Coburg**  
**Oregon**

- City Limits
- Current UGB
- UGB Study Areas





**UGB Study Area 5 - Zoning  
Buildable Land Inventory  
City of Coburg  
Oregon**

**Zoning Classification**

- |   |     |   |                 |
|---|-----|---|-----------------|
|  | E30 |  | Tax Lots        |
|  | E40 |  | Current UGB     |
|  | R   |  | City Limits     |
|  | RC  |  | UGB Study Areas |
|  | RPR |   |                 |
|  | RR2 |   |                 |
|  | RR5 |   |                 |





**AREA 5**

**Class 1 = 21.90 acres**  
**Class 2 = 86.16 acres**  
**Class 4 = 5.71 acres**

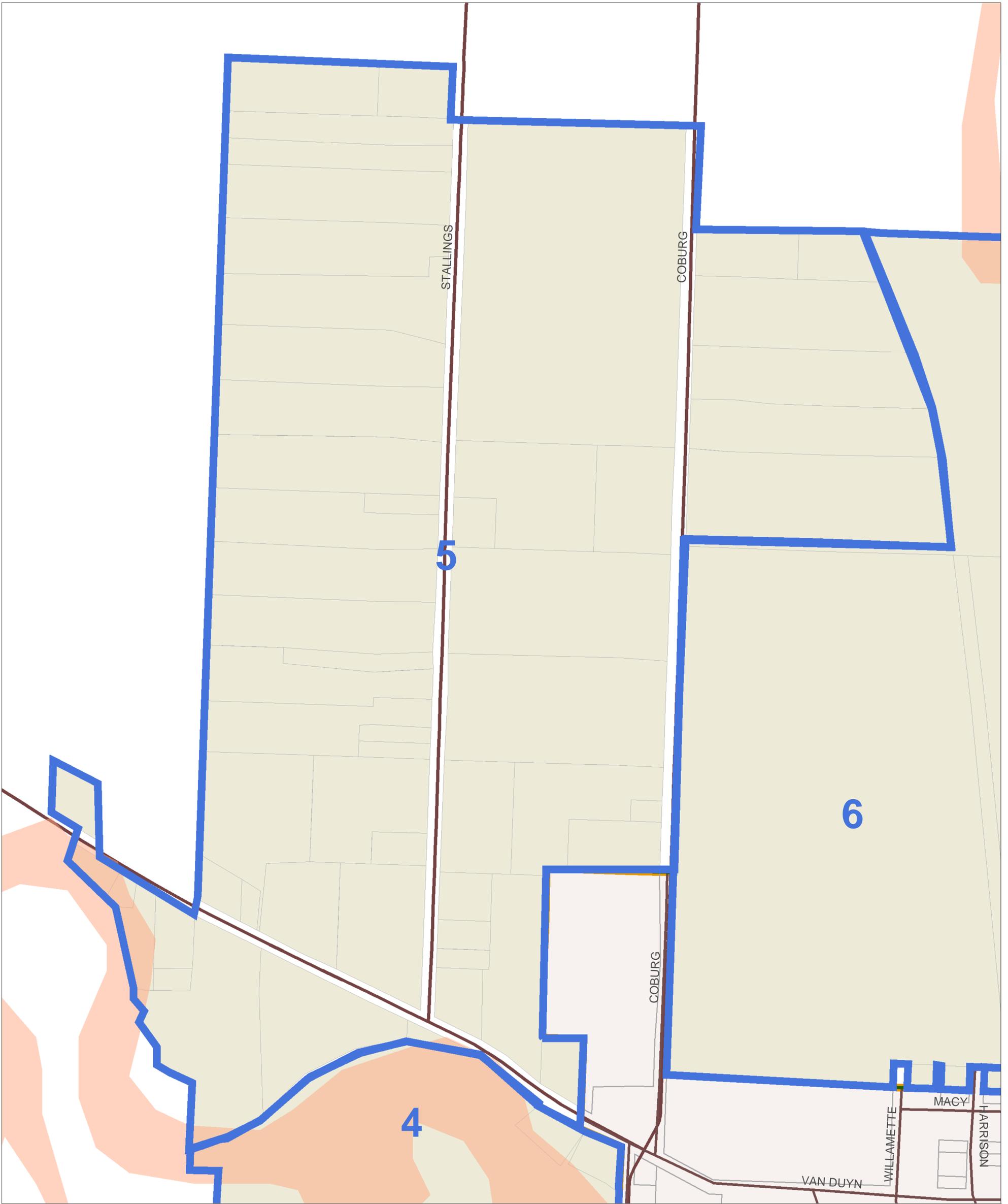
**UGB Study Area 5 - Soils**  
**Buildable Land Inventory**  
**City of Coburg**  
**Oregon**

**Soil Capability Classification**

- Class 1
  - Class 2
  - Class 3
  - Class 4
  - Class 5
  - Class 6
  - Class 7
  - Class 8
- Tax Lots
  - Current UGB
  - City Limits
  - UGB Study Areas



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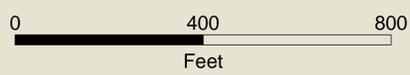
# UGB Study Area 5 - Constrained Lands

## Buildable Land Inventory

City of Coburg

Oregon

- National Wetland Inventory
- 100 Year Floodway
- Tax Lots
- Current UGB
- City Limits
- UGB Study Areas



## STUDY AREA 6

Study area 6 includes lands north of the existing UGB. The area is contiguous with the existing UGB on the north side and part of the east and west sides. The study area includes approximately 209 acres in 7 parcels. The study area is about 2,600 feet from east to west, and about 3,500 feet from north to south.

The majority of the study area (208 acres) zoned for agricultural uses (E-40). Less than 1 acre is zoned for rural residential uses (RR-5). A total of 6 dwelling units exist in the study area. Topographically, the site is largely flat. Only 7.0 of the 209 acres is in flood zone A (the 100-year floodplain). Areas in flood zone A are mostly in a canal that transects the study area.

Of the 208 acres in this study area zoned for agricultural uses, 63.6 acres are in Class 1 soil types and 138.5 acres are identified as Class 2 soil types, and 5.9 acres are in Class 4 soil types.

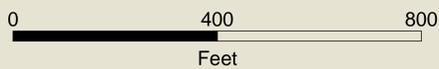
Study area 6 is probably the easiest to provide sewer service to due to its proximity to the proposed sewer treatment plan. A pump station would probably not be required to move sewage from the area to the treatment plant. Water service would be relatively easy to extend to the site, as would electrical.

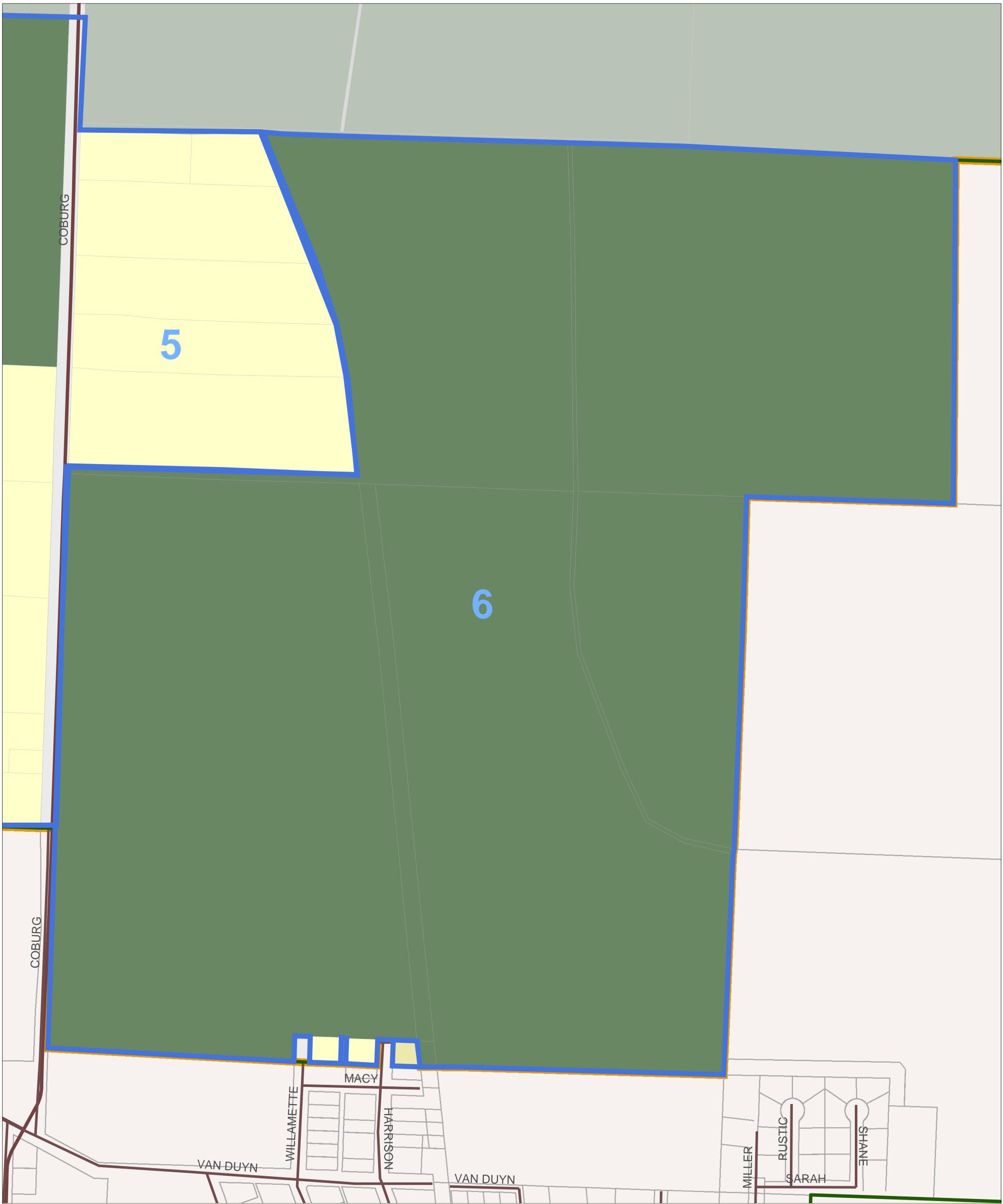
Transportation access to the site would probably have to come from Coburg Road. Additional access could come from Roberts Road. This study area also provides an opportunity for the extension of Willamette Street—Coburg's main street.



**UGB Study Area 6**  
**Buildable Land Inventory**  
**City of Coburg**  
**Oregon**

- City Limits
- Current UGB
- UGB Study Areas





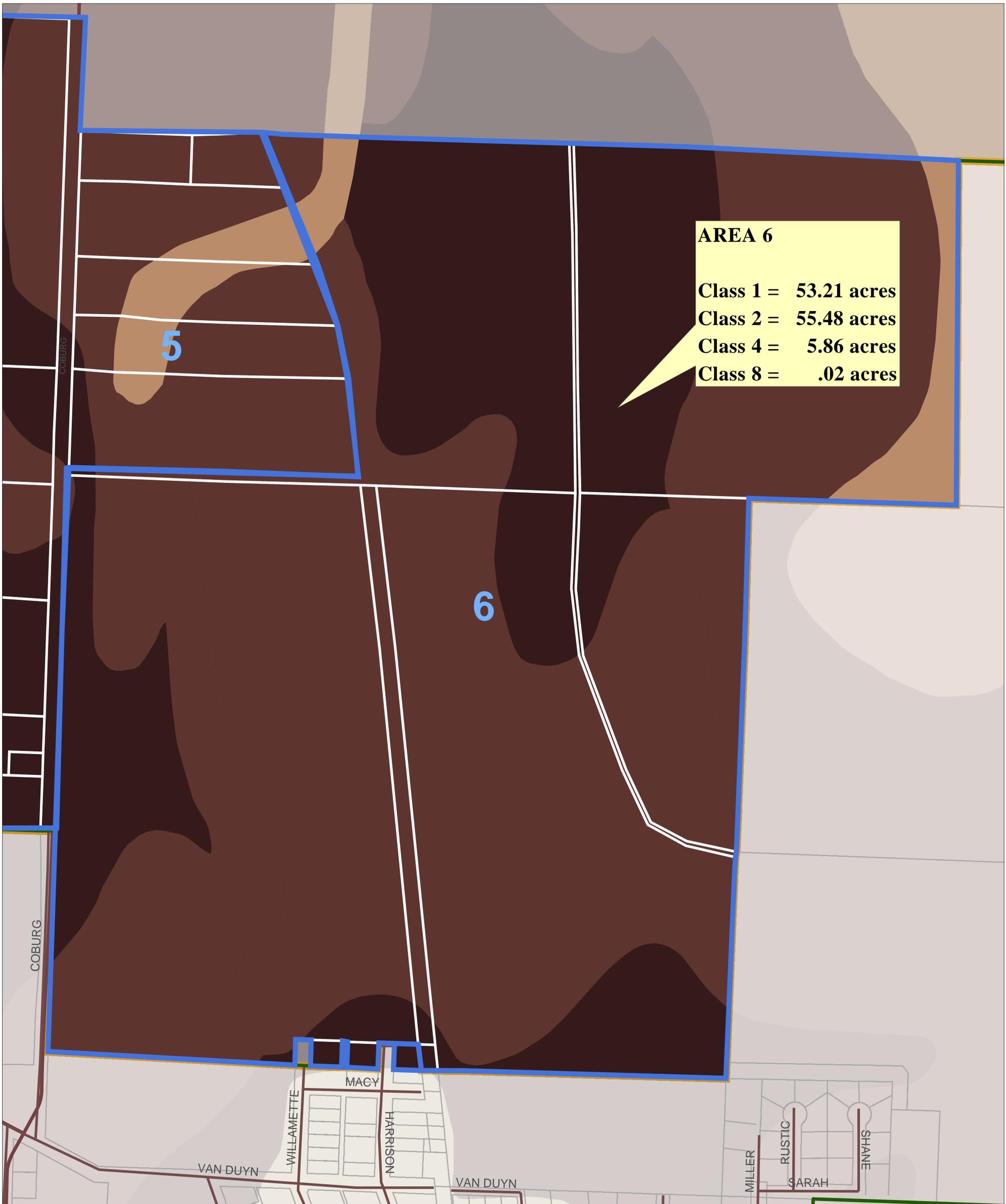
**UGB Study Area 6 - Zoning**  
**Buildable Land Inventory**  
**City of Coburg**  
**Oregon**

**Zoning Classification**

- E30
- E40
- R
- RC
- RPR
- RR2
- RR5

- Tax Lots
- Current UGB
- City Limits
- UGB Study Areas





**AREA 6**

Class 1 = 53.21 acres  
 Class 2 = 55.48 acres  
 Class 4 = 5.86 acres  
 Class 8 = .02 acres

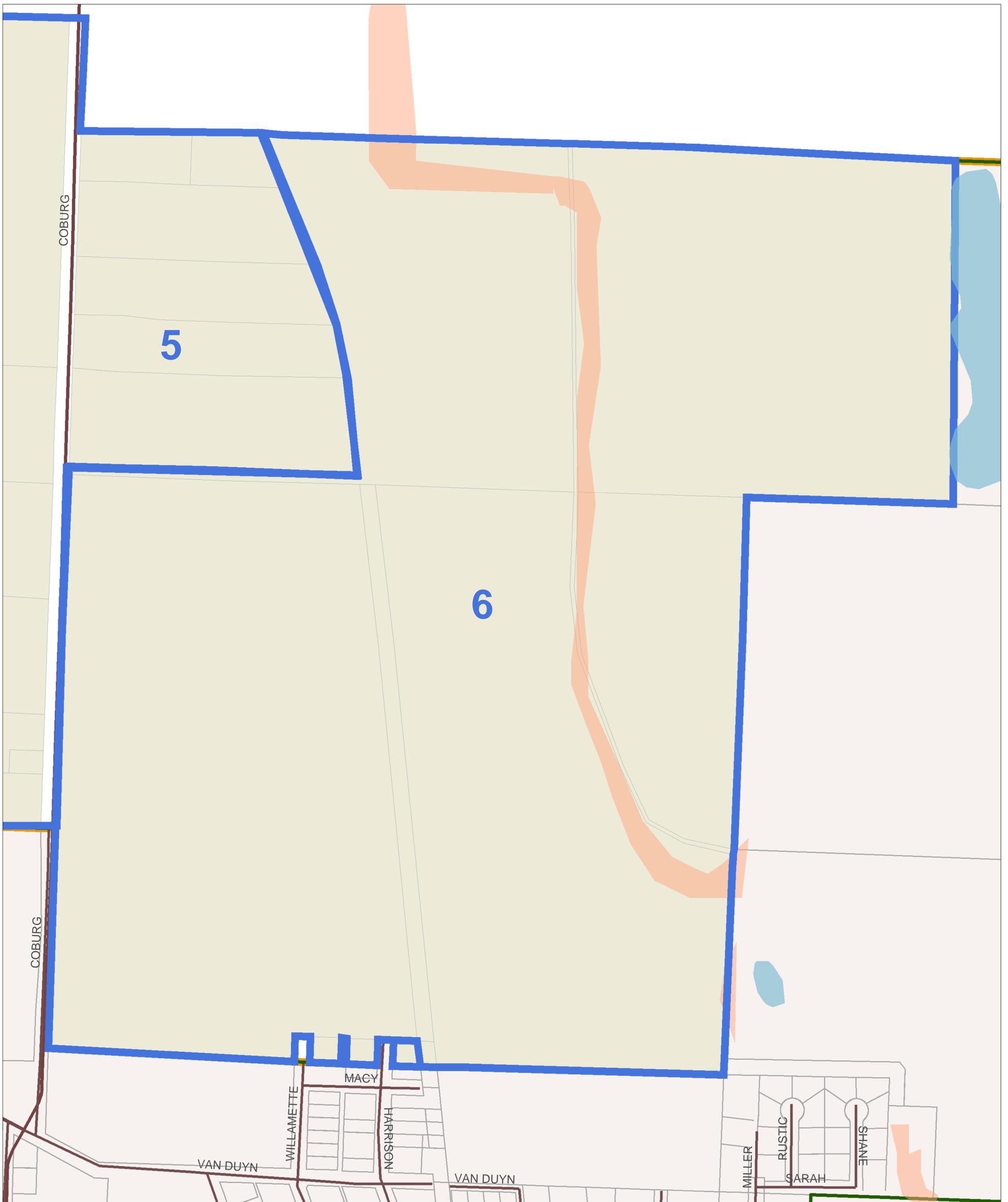
**UGB Study Area 6 - Soils**  
**Buildable Land Inventory**  
**City of Coburg**  
**Oregon**

**Soil Capability Classification**

- Class 1
  - Class 2
  - Class 3
  - Class 4
  - Class 5
  - Class 6
  - Class 7
  - Class 8
- Tax Lots
  - Current UGB
  - City Limits
  - UGB Study Areas



UO InfoGraphics lab, Department of Geography  
 Cartography/GIS: Ken Kato, Jesse Manley, January 2004.



# UGB Study Area 6 - Constrained Lands

## Buildable Land Inventory

City of Coburg

Oregon

- |   |                            |   |                 |
|---|----------------------------|---|-----------------|
|  | National Wetland Inventory |  | Tax Lots        |
|  | 100 Year Floodway          |  | Current UGB     |
|   |                            |  | City Limits     |
|   |                            |  | UGB Study Areas |



## STUDY AREA 7

Study area 7 includes lands east of the existing UGB and across Interstate 5. The area is not contiguous with the existing UGB. Inclusion of this area would require additional expansion of the UGB across I-5. The study area includes approximately 240 acres in 3 parcels. The study area is about 2,500 feet from east to west, and about 5,000 feet from north to south.

The entire study area (239.9 acres) zoned for agricultural uses (E-40). Agricultural lands in the study area are used primarily for grazing. No development exists in this study area. Topographically, the site is largely flat. The study area has (23 acres) is in flood zone A (the 100-year floodplain) or in identified wetland area. The major development constraint in this study area is extending municipal services across I-5.

Of the 240 acres in this study area zoned for agricultural uses, 5.6 acres are in Class 2 soil types and 230.7 acres are identified as Class 4 soil types, and 3.7 acres are identified as Class 6 soil types.

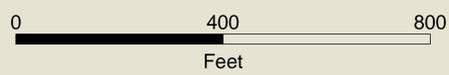
Study area 7 appears more difficult to service due to its location east of I-5. Water, sewer, electricity, and storm drainage would all probably require boring under the Interstate. A pump station might be required to move sewage from the area to the treatment plant on the north end of Coburg.

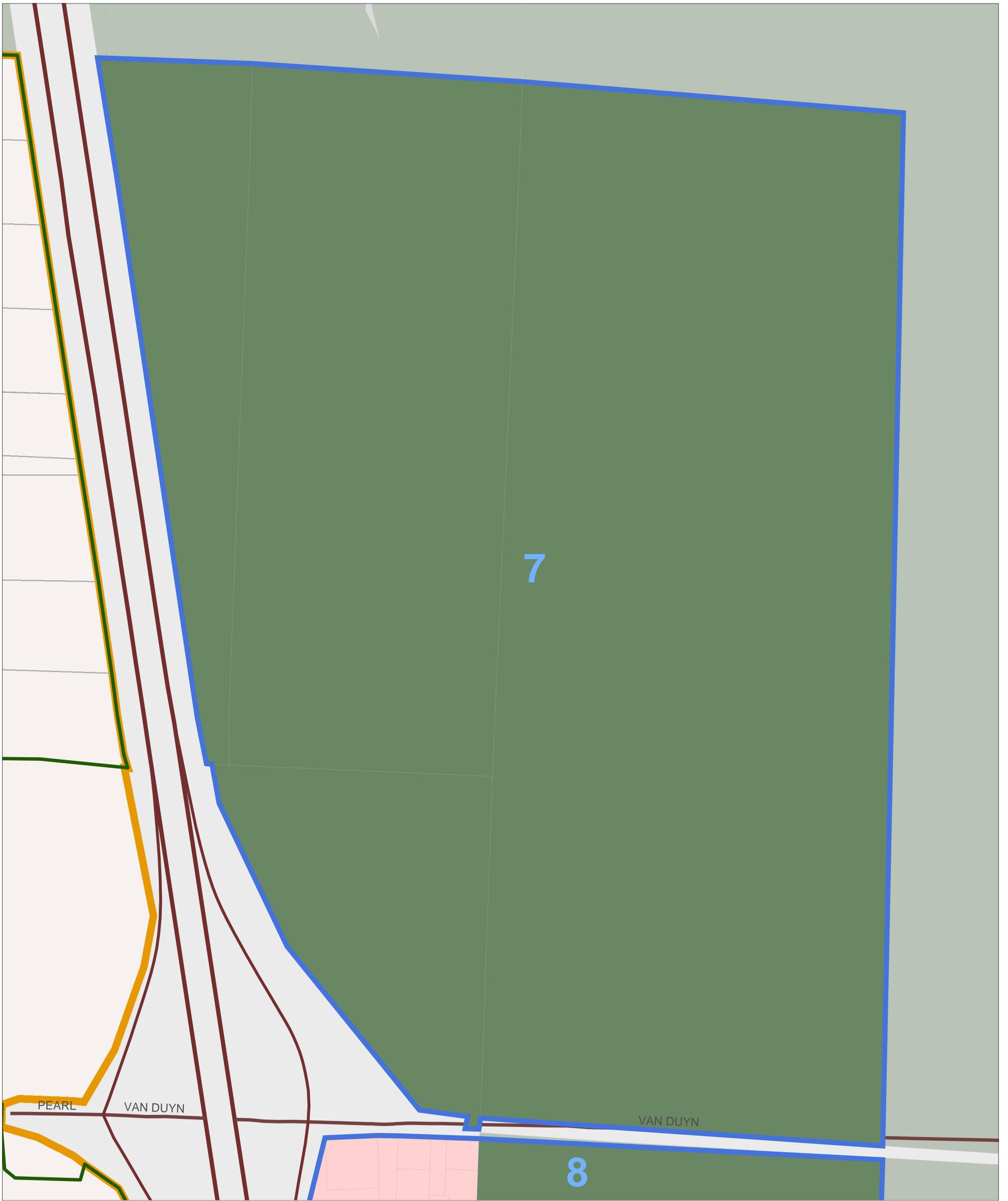
Transportation access to the site would come from Van Duyn Road—a County Road. Development on the site may be constrained until the I-5 interchange improvements area completed.



**UGB Study Area 7**  
**Buildable Land Inventory**  
**City of Coburg**  
**Oregon**

-  City Limits
-  Current UGB
-  UGB Study Areas



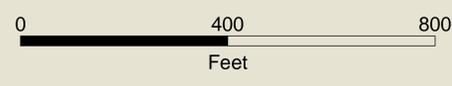


**UGB Study Area 7 - Zoning**  
**Buildable Land Inventory**  
**City of Coburg**  
**Oregon**

**Zoning Classification**

- E30
- E40
- R
- RC
- RPR
- RR2
- RR5

- Tax Lots
- Current UGB
- City Limits
- UGB Study Areas



UO InfoGraphics lab, Department of Geography  
 Cartography/GIS: Ken Kato, Jesse Manley, January 2004.



**AREA 7**

**Class 2 = 5.57 acres**

**Class 4 = 230.66 acres**

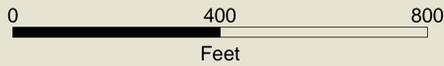
**Class 6 = 3.67 acres**

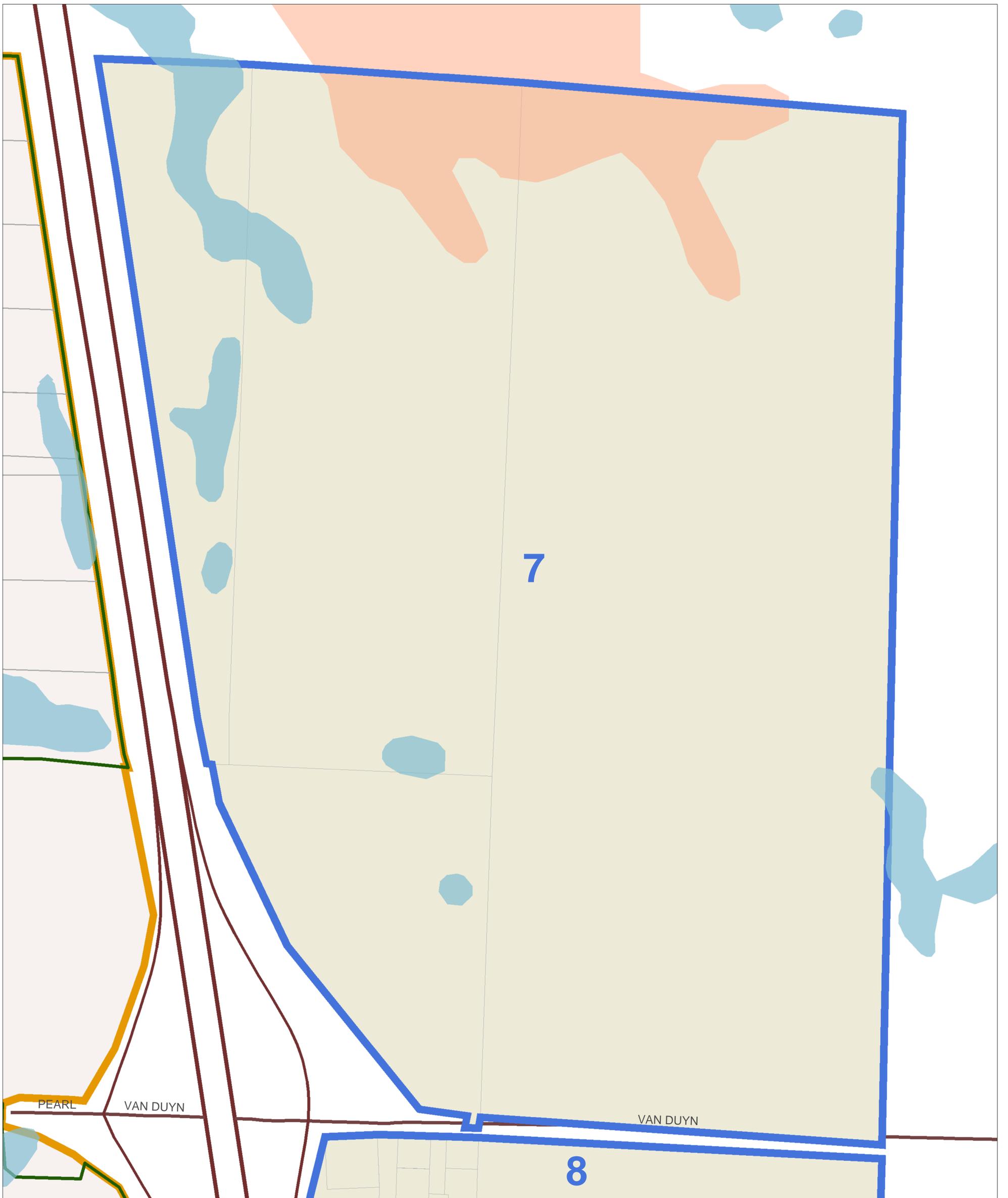
**UGB Study Area 7 - Soils**  
**Buildable Land Inventory**  
**City of Coburg**  
**Oregon**

**Soil Capability Classification**

- Class 1
- Class 2
- Class 3
- Class 4
- Class 5
- Class 6
- Class 7
- Class 8

- Tax Lots
- Current UGB
- City Limits
- UGB Study Areas





# UGB Study Area 7 - Constrained Lands

## Buildable Land Inventory

City of Coburg

Oregon

- |  |   |
|--|---|
|  National Wetland Inventory |  Tax Lots        |
|  100 Year Floodway          |  Current UGB     |
|  |  City Limits     |
|  |  UGB Study Areas |



## STUDY AREA 8

Study area 8 includes lands east of the existing UGB and across Interstate 5. While the area is not contiguous with the existing UGB, the City was in the process of expanding the UGB to include the Country Squire development.

Inclusion of this area would require additional expansion of the UGB across I-5. The study area includes approximately 142 acres in 13 parcels. About 36 of these acres are in exceptions areas and are included in the proposed UGB expansion. The study area is about 2,000 feet from east to west, and about 3,000 feet from north to south.

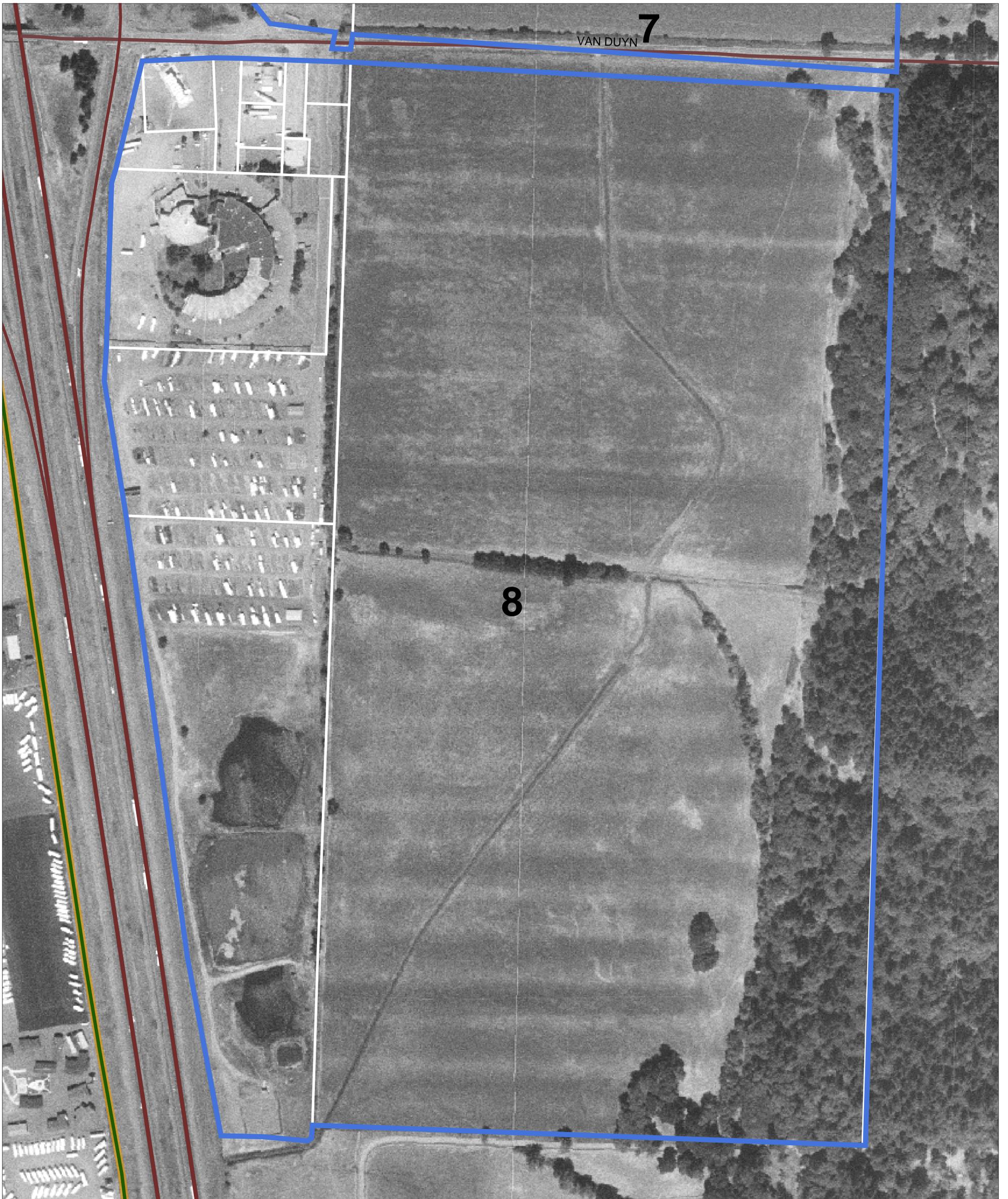
About 106 acres in this study area are zoned for agricultural uses (E-40). Agricultural lands in the study area are used primarily for grazing. The study area also includes 36 acres in exceptions areas zoned for Rural Commercial uses (RC). Existing uses included the Country Squire Inn an RV park and some related uses. All of the exceptions areas are included in a UGB expansion proposal under review at the time this study was completed.

Topographically, the site is largely flat. The study area has (8 acres) is in identified wetland areas. All of the wetland areas are zoned for exceptions and are included in the proposed UGB expansion. The major development constraint in this study area is extending municipal services across I-5.

Of the 106 acres in this study area zoned for agricultural uses, 2.2 acres are in Class 3 soil types and 53.2 acres are identified as Class 4 soil types, and 50.3 acres are identified as Class 6 soil types.

Study area 8 appears more difficult to service due to its location east of I-5. Water, sewer, electricity, and storm drainage would all probably require boring under the Interstate. A pump station might be required to move sewage from the area to the treatment plant on the north end of Coburg. This issue may get resolved if the UGB expansion proposal is approved and the City plans to extend services to the site.

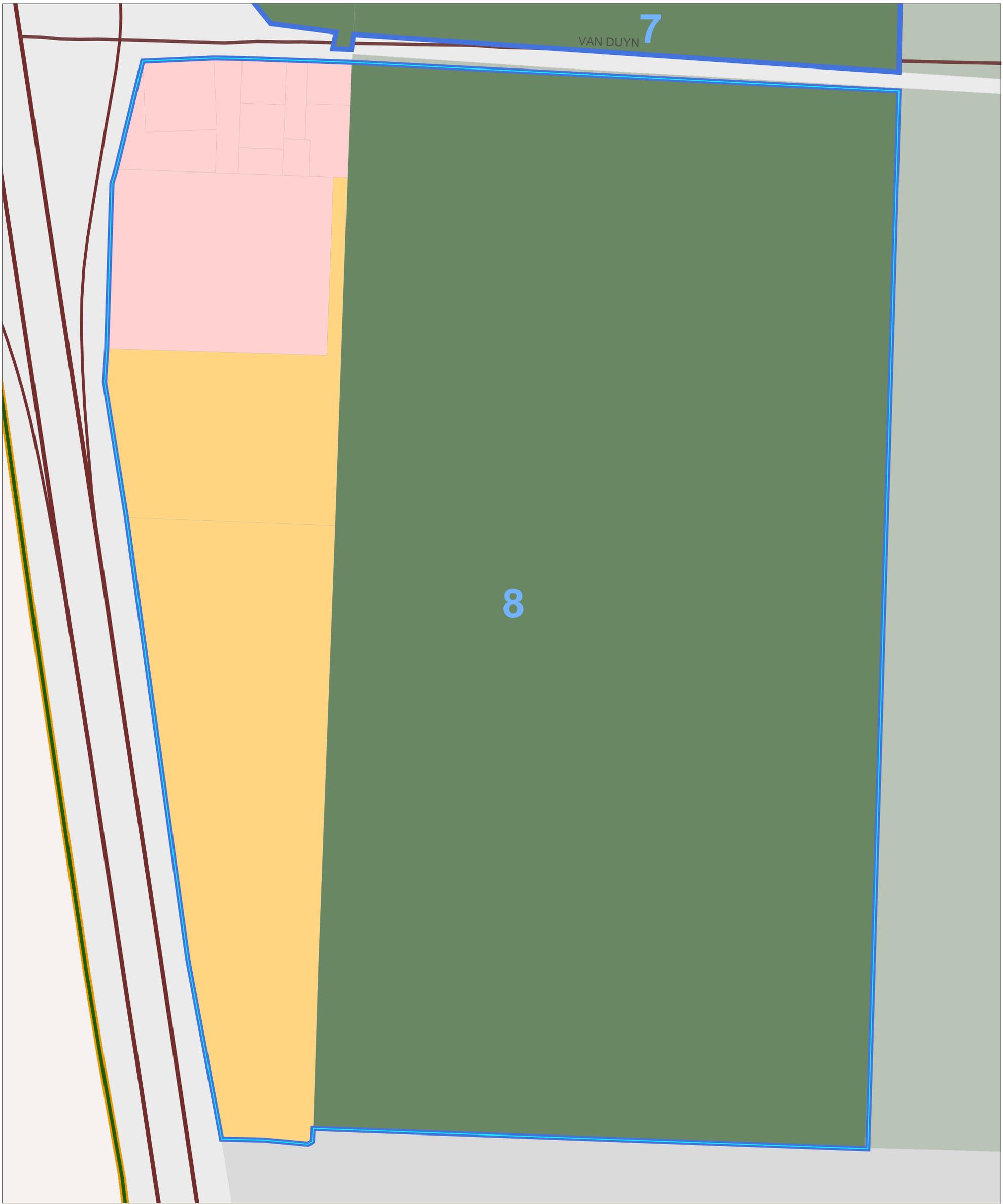
Transportation access to the site would come from Van Duyn Road—a County Road. Development on the site may be constrained until the I-5 interchange improvements area completed.



**UGB Study Area 8**  
**Buildable Land Inventory**  
**City of Coburg**  
**Oregon**

-  City Limits
-  Current UGB
-  UGB Study Areas



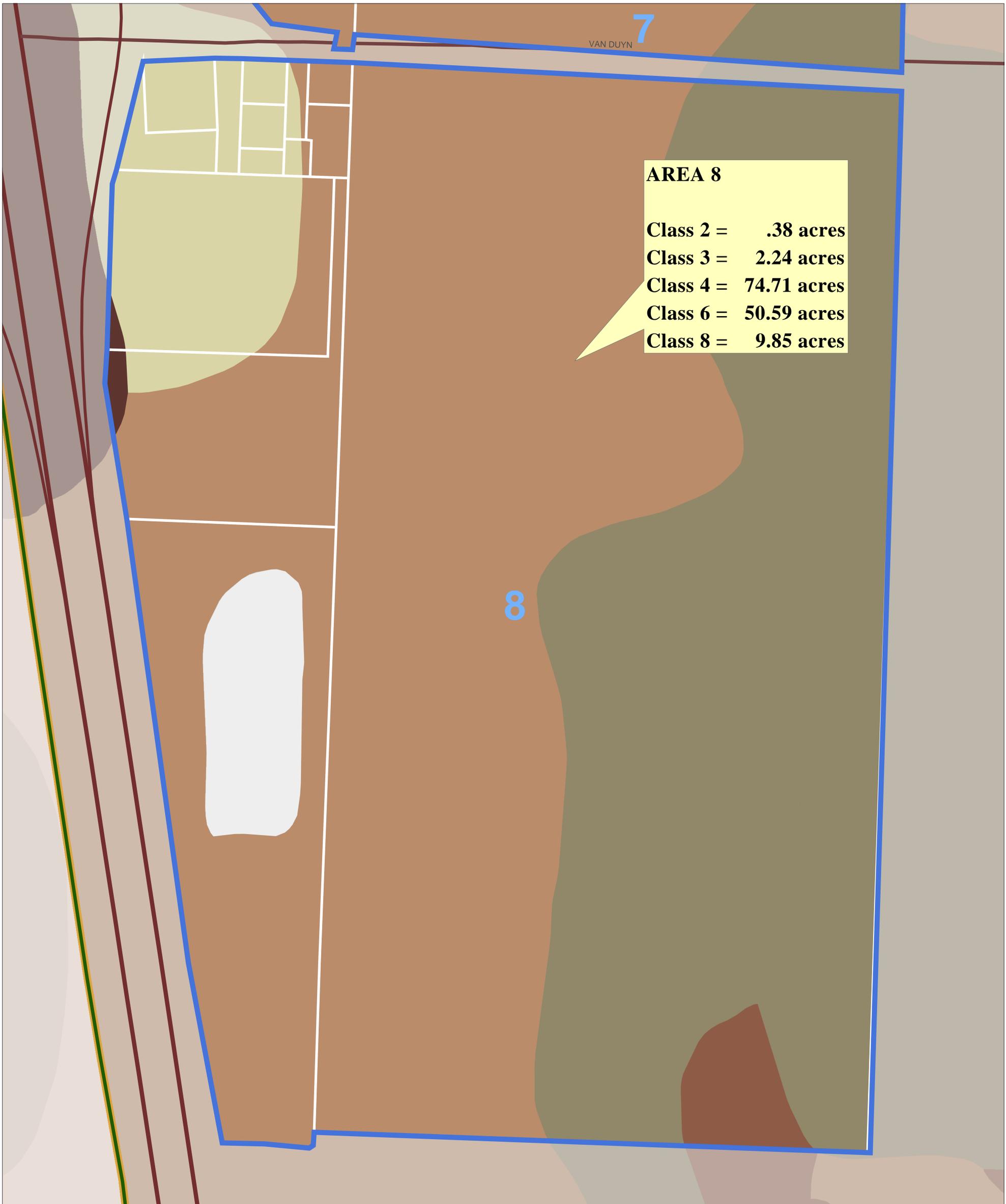


**UGB Study Area 8 - Zoning**  
**Buildable Land Inventory**  
**City of Coburg**  
**Oregon**

**Zoning Classification**

- |   |     |   |                 |
|---|-----|---|-----------------|
|  | E30 |  | Tax Lots        |
|  | E40 |  | Current UGB     |
|  | R   |  | City Limits     |
|  | RC  |  | UGB Study Areas |
|  | RPR |   |                 |
|  | RR2 |   |                 |
|  | RR5 |   |                 |





**AREA 8**

**Class 2 = .38 acres**  
**Class 3 = 2.24 acres**  
**Class 4 = 74.71 acres**  
**Class 6 = 50.59 acres**  
**Class 8 = 9.85 acres**

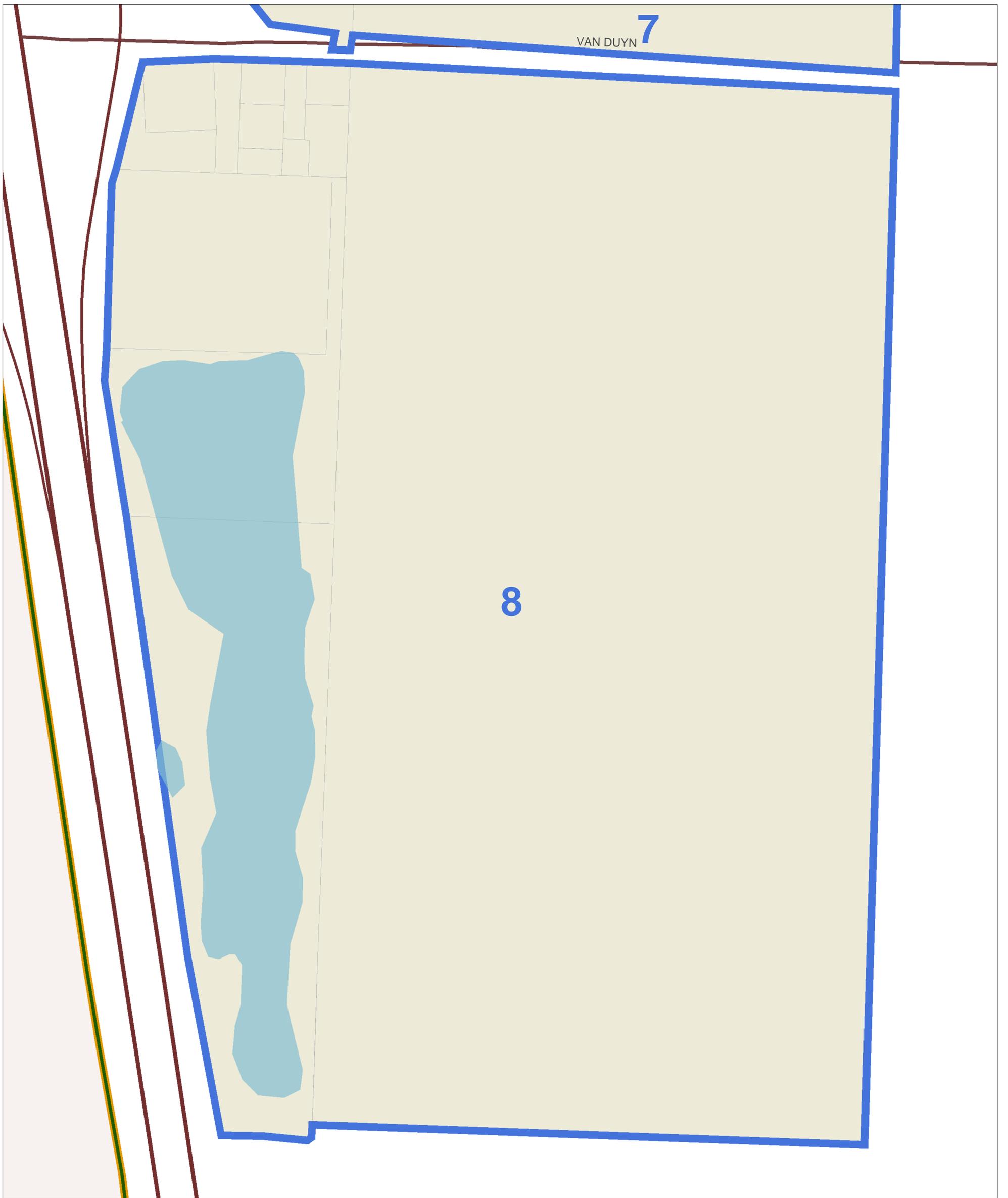
**UGB Study Area 8 - Soils**  
**Buildable Land Inventory**  
**City of Coburg**  
**Oregon**

**Soil Capability Classification**

-  Class 1
  -  Class 2
  -  Class 3
  -  Class 4
  -  Class 5
  -  Class 6
  -  Class 7
  -  Class 8
-  Tax Lots
  -  Current UGB
  -  City Limits
  -  UGB Study Areas



UO InfoGraphics lab, Department of Geography  
 Cartography/GIS: Ken Kato, Jesse Manley, January 2004.



**UGB Study Area 8 - Constrained Lands**  
**Buildable Land Inventory**  
**City of Coburg**  
**Oregon**

- |  |   |
|--|---|
|  National Wetland Inventory |  Tax Lots        |
|  100 Year Floodway          |  Current UGB     |
|  |  City Limits     |
|  |  UGB Study Areas |

