

Florence Economic Opportunity Analysis and Housing Needs Analysis

Presented at
8.1.17 HEOP
Meeting

HEOP Project Committee Meeting

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July 24, 2017

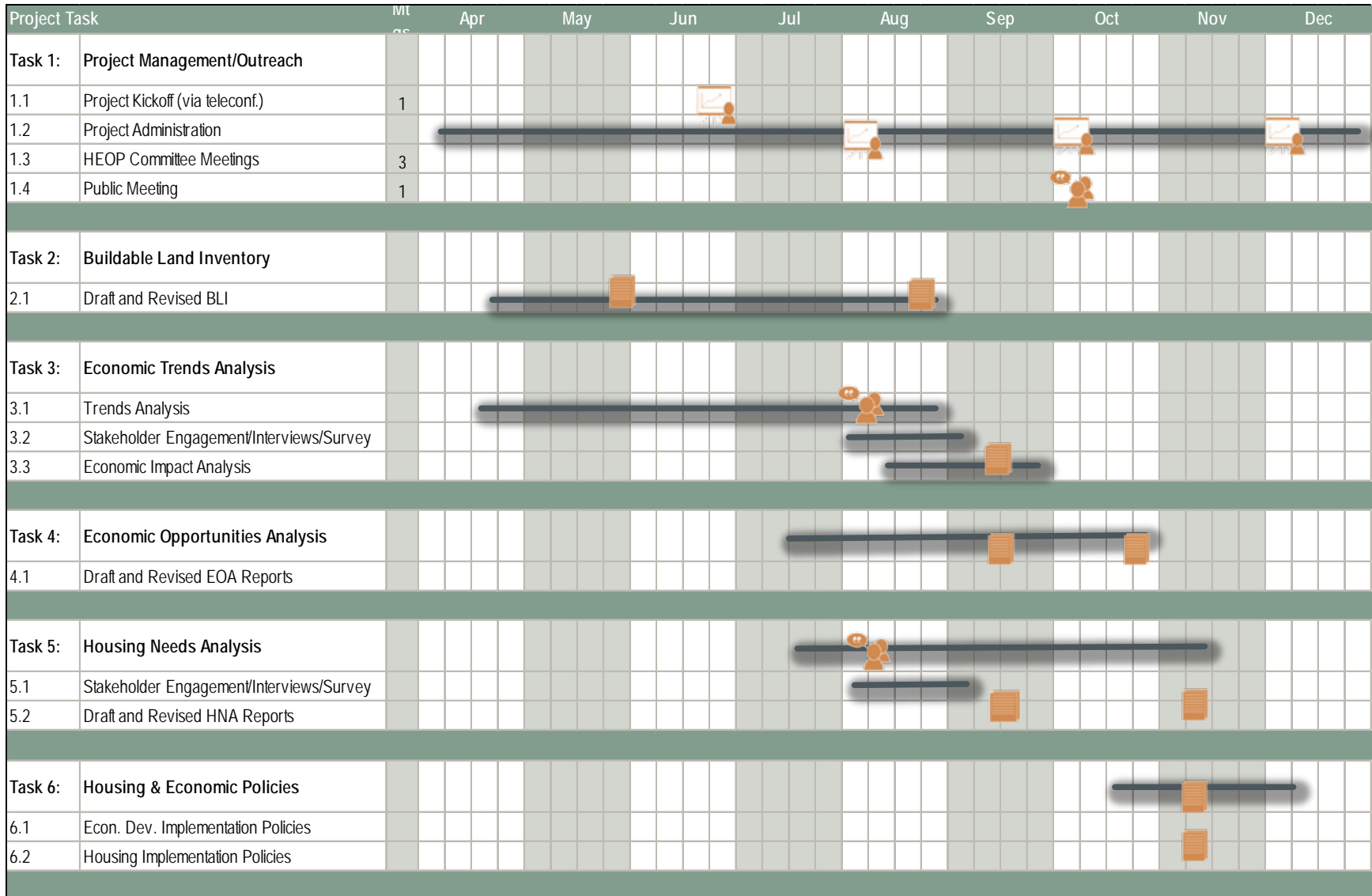


Meeting Agenda

- ◆ Project Schedule and Next Steps
- ◆ Draft Buildable Land Inventory Findings
- ◆ Draft Economic Opportunity Findings
- ◆ Draft Housing Needs Findings
- ◆ Issues Discussion



Florence EOA and HNA Schedule



* Housing and Economic Opportunities Project Committee



Draft BLI Findings

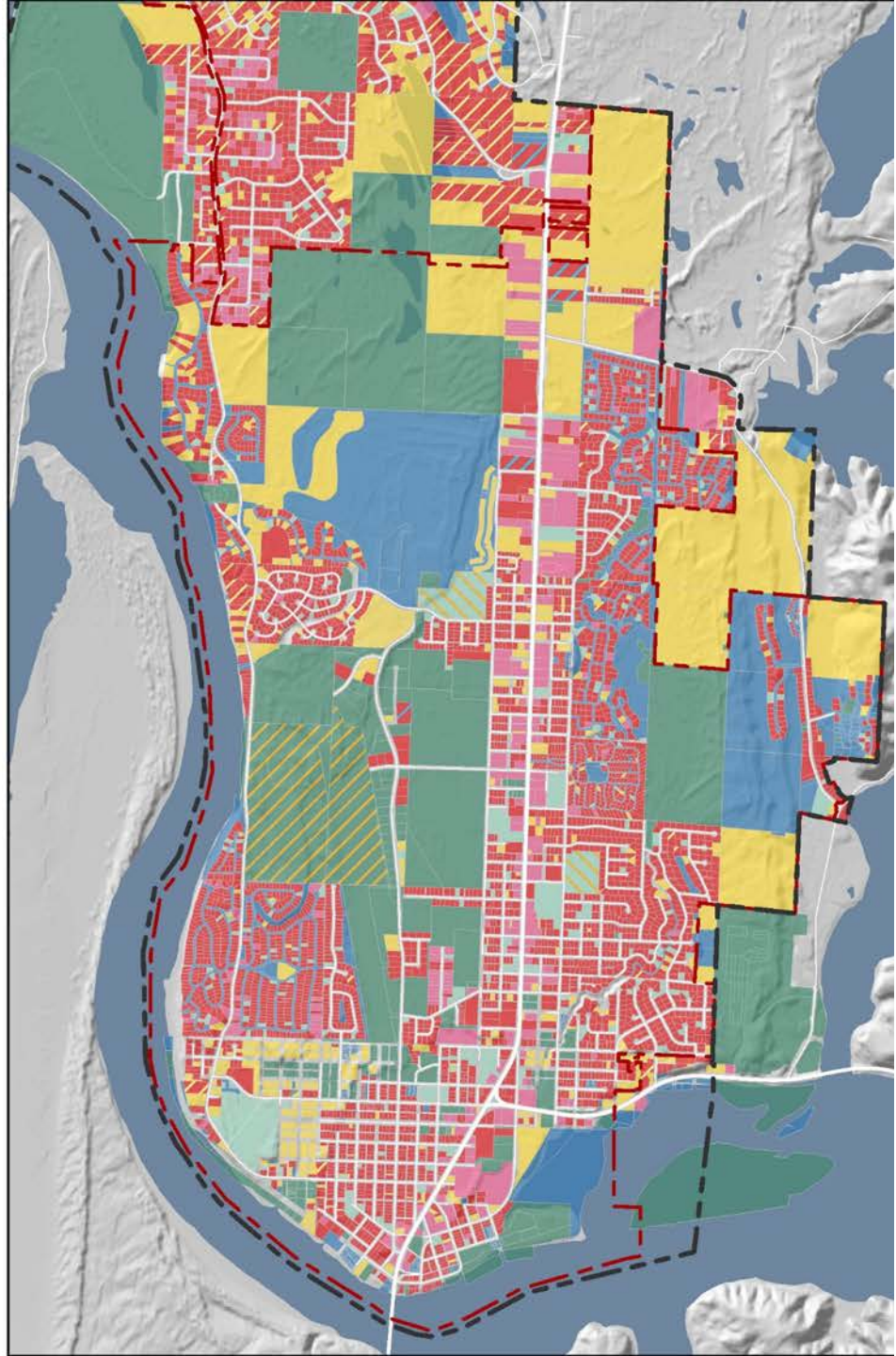
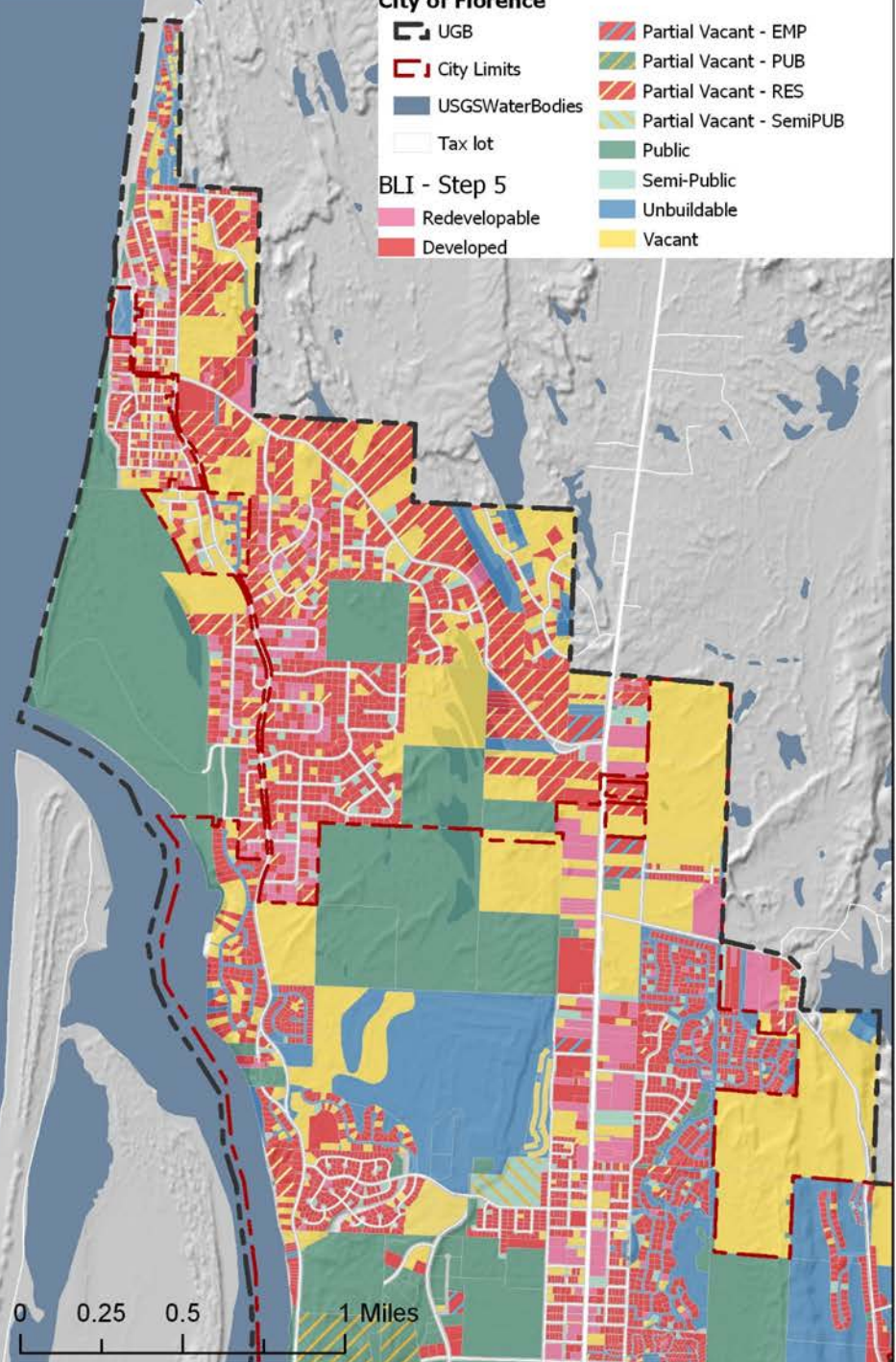
- ◆ Florence must maintain Urban Growth Boundary that accommodates 20-years of growth and development
- ◆ State guidelines are followed to measure “buildable lands”
- ◆ Florence has 5 types of buildable lands with a total of 710.8 acres

Summary of BLI in City of Florence, 2017		
BLI Category	Acres	Dist.
Vacant, Private	370.2	52%
Vacant, Public	101.8	14%
Part Vacant, Private	14.5	2%
Part Vacant, Public	74.0	10%
Redevelopable	150.3	21%
Total	710.8	100%

Source: GIS analysis by Fregonese Associates; analysis by FCS GROUP.

City of Florence

- UGB
- City Limits
- USGSWaterBodies
- Tax lot
- BLI - Step 5
 - Redevelopable
 - Developed
- Partial Vacant - EMP
- Partial Vacant - PUB
- Partial Vacant - RES
- Partial Vacant - SemiPUB
- Public
- Semi-Public
- Unbuildable
- Vacant





Draft BLI Findings

- ◆ Is the land properly zoned?
- ◆ Are there adequate unconstrained sites for desired development?

Buildable Land Inventory within City of Florence, 2017										
Residential Zones	Parcels					Acres				
	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	Subtotal Parcels	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	Subtotal Acres
Category										
Vacant, Private*	436	8	3	9	456	74.3	11.0	18.3	161.9	265.6
Vacant, Public/Semi Public*	37	2	0	0	39	7.7	1.8	0.0	0.0	9.5
Part Vacant, Private	11	6	0	0	17	3.4	3.6	0.0	0.0	7.0
Part Vacant, Public/Semi-Public	0	1	1	1	3	0.0	2.8	6.0	11.3	20.2
Redevelopable	88	2	1	0	91	25.6	4.6	0.0	0.0	30.2
Total	572	19	5	10	606	111.1	23.9	24.3	173.2	332.5
Employment Zones	Parcels					Acres				
	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	Subtotal Parcels	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	Subtotal Acres
Category										
Vacant, Private*	234	14	1	1	250	51.1	23.4	7.0	13.3	94.8
Vacant, Public/Semi Public*	74	21	0	1	96	23.2	35.5	0.0	32.5	91.1
Part Vacant, Private	0	4	0	0	4	0.0	7.5	0.0	0.0	7.5
Part Vacant, Public/Semi-Public	0	0	0	2	2	0.0	0.0	0.0	53.8	53.8
Redevelopable	5	0	1	0	6	49.3	50.5	12.7	0.0	112.5
Total	313	39	2	4	358	123.7	116.8	19.7	99.6	359.8
Mixed Use Zones	Parcels					Acres				
	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	Subtotal Parcels	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	Subtotal Acres
Category										
Vacant, Private*	9	1	1	0	11	1.9	2.8	5.1	0.0	9.8
Vacant, Public/Semi Public*	1	1	0	0	2	0.2	0.9	0.0	0.0	1.2
Part Vacant, Private	0	0	0	0	0	0.0	0.0	0.0	0.0	0.0
Part Vacant, Public/Semi-Public	0	0	0	0	0	0.0	0.0	0.0	0.0	0.0
Redevelopable	5	0	1	0	6	2.1	0.0	5.4	0.0	7.6
Total	15	2	2	0	19	4.3	3.7	10.6	0.0	18.5
Notes:										
* identified as vacant in Lane County assessor data										
Source: GIS analysis by Fregonese Associates; analysis by FCS GROUP.										

BLI Questions and Discussion



Draft Housing Needs Findings

- ◆ Florence UGB expected to add 2,068 +/- people over 20 years
- ◆ About 71% to 80% will be within City limits

Population Trends

	2000	2010	2016	AGR 2000-2010	AGR 2010-2016
Florence	7,263	8,466	8,680	1.5%	0.4%
Lane County	322,959	351,715	365,940	0.9%	0.7%
Oregon	3,421,399	3,761,925	4,076,350	1.0%	1.3%

Source: U.S. Census Bureau and Portland State University Population Research Center.

Abbreviations: AGR = average annual growth rate

Compiled by FCS Group.

Population Forecasts

	2015	2020	2025	2030	2035	AGR
Lane County	361,474	378,335	394,921	410,247	424,117	0.80%
Florence UGB	10,486	11,116	11,714	12,219	12,554	0.90%
Oregon	4,013,845	4,252,100	4,516,200	4,768,000	4,995,200	1.10%

Source: Portland State University Population Research Center

Forecasts of Oregon's County Populations and Components of Change, 2010-2050.

Compiled by FCS Group. AGR = average annual growth rate.



Demographic Trends (regional)

Established Families and Boomers



Baby Boomers (46-64) will constitute a senior pop. unprecedented in size. They will look for homes where they can age-in-place.

Young and Diverse Families



Florence will continue to grow and increase in diversity. These households will seek rental housing and entry-level homeownership.

Millennials



Millennials may rent far longer than previous generations. They prefer walkable neighborhoods.



Draft Housing Needs Findings

- ◆ Florence UGB expected to add 1,481 total housing units over 20 years
- ◆ About 18% will be seasonal “second homes” & short term rentals
- ◆ Housing affordability is key

Florence Population & Housing: Baseline 20-Year Forecast

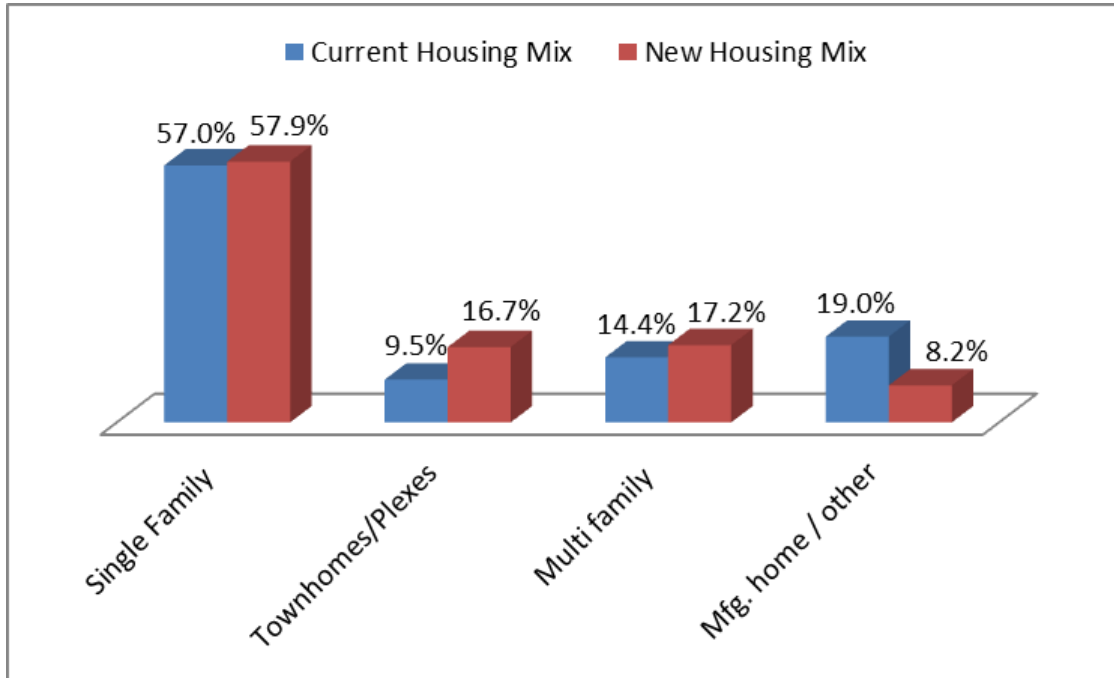
	Estimate 2015	Forecast 2035	Proj. Change 20 Years	Proj. AGR
Florence UGB Population	10,486	12,554	2,068	0.90%
Florence Housing Needs				
Group Quarters Population	98	118	19	
Population in Households	10,388	12,436	2,049	
Avg. Household Size	1.95	1.90		
Resident Housing Units	5,327	6,546	1,218	1.04%
Total Housing Units	6,477	7,959	1,481	1.04%
Seasonal & Vacant Housing Units	1,150	1,413	263	1.04%
percent of housing stock	18%	18%	18%	

Source: Findings based on PSU Population Research Center data, Census data, and forecasts consistent with Florence UGB growth forecasts; FCS GROUP.



Draft Housing Needs Findings

- ◆ Multiple housing types are needed
- ◆ Increased demand for SFD, townhomes & apartments expected
- ◆ Senior housing & congregate care facilities





Draft Housing Needs Findings

- ◆ Housing demand = 218 +/- acres of land needed (base scenario)
- ◆ Added workforce housing demand to meet any pent up demand?

Scenario A: Dwelling Unit Demand, Baseline Forecast				1,481		
	Owner-Occupied Dwelling Units	Renter-Occupied Dwelling Units	Second Homes & Short Term Rentals	Net New Dwelling Units	Average Density (DU per Net Buildable Acre)	Potential Land Need (Net Buildable Acres)*
Housing Tenure Distribution:	750	469	263	1,481	6.8	218.4
	51%	32%	18%	100%		
Housing Unit/Type Distribution						
Single Family Detached	562	164	132	858	6.0	164.4
Townhomes / Plexes	75	94	79	248	12.0	23.7
Multi family (5+ units)	37	164	53	254	18.0	16.2
Mfg. home / other	75	47	0	122	10.0	14.0
Total	750	469	263	1,481	6.8	218.4

* assumes 15% of land area added for public roads and infrastructure.



Draft Housing Needs Findings

- ◆ Rents should be less than \$1,180 per month (@80% MFI for County)
- ◆ Home prices should be less than \$234,000 (@80% MFI for County)

Housing Attainability Analysis for Florence

Lane County Median Family Income Level (2017)*		\$59,000
Available Monthly Rent or Payment (@30% of income level)		
High (120% or more of MFI)	Lower-end	Upper-End
	\$1,770	or more
Upper Middle (80% to 120% of MFI)	\$1,180	\$1,770
Lower Middle (50% to 80% of MFI)	\$738	\$1,180
Low (30% to 50%)	\$443	\$738
Very Low (less than 30% of MFI)	\$443	or less
Approximate Attainable Home Price**		
High (120% or more of MFI)	Lower-end	Upper-End
	\$351,000	or more
Upper Middle (80% to 120% of MFI)	\$234,000	\$351,000
Lower Middle (50% to 80% of MFI)	\$146,000	\$234,000
Low (30% to 50%)	\$88,000	\$146,000
Very Low (less than 30% of MFI)	\$88,000	or less

Notes:

* based on Housing and Urban Development thresholds for Lane County in 2017

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

** assumes 20% down payment on 30-year fixed mortgage at 6.0% interest.

Source: analysis by FCS GROUP using Housing and Urban Development, and US Census data.



Draft Housing Needs Findings

- ◆ Rents should be less than \$922 per month (@80% MFI for City)
- ◆ Home prices should be less than \$183,000 (@80% MFI for City)

Florence Median Family Income Level (2015)*		\$46,114
Available Monthly Rent or Payment (@30% of income level)		
	Lower-end	Upper-End
High (120% or more of MFI)	\$1,383	or more
Upper Middle (80% to 120% of MFI)	\$922	\$1,383
Lower Middle (50% to 80% of MFI)	\$576	\$922
Low (30% to 50%)	\$346	\$576
Very Low (less than 30% of MFI)	\$346	or less
Approximate Attainable Home Price**		
	Lower-end	Upper-End
High (120% or more of MFI)	\$274,000	or more
Upper Middle (80% to 120% of MFI)	\$183,000	\$274,000
Lower Middle (50% to 80% of MFI)	\$114,000	\$183,000
Low (30% to 50%)	\$69,000	\$114,000
Very Low (less than 30% of MFI)	\$69,000	or less

Notes:

* based on American Community Survey data for City, 2011-15.

** assumes 20% down payment on 30-year fixed mortgage at 6.0% interest.

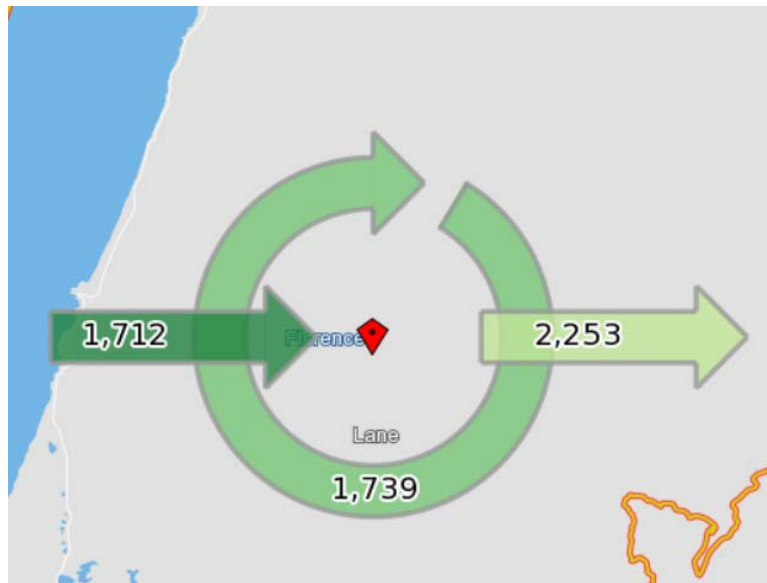
Source: analysis by FCS Group using Housing and Urban Development guidelines, and US Census data.

Housing Needs Questions and Discussion



Draft Economic Opportunity Findings

- ◆ Florence serves as a major regional destination center
- ◆ Tourism, retail/services, health care , education, small business and retirees drive local economy
- ◆ City of Florence has 400 business establishments with 3,750+ workers
- ◆ 1,712 in-commuters + 2,253 out-commuters + 1,739 locals in service area



Top Private Employers in Florence (2015)

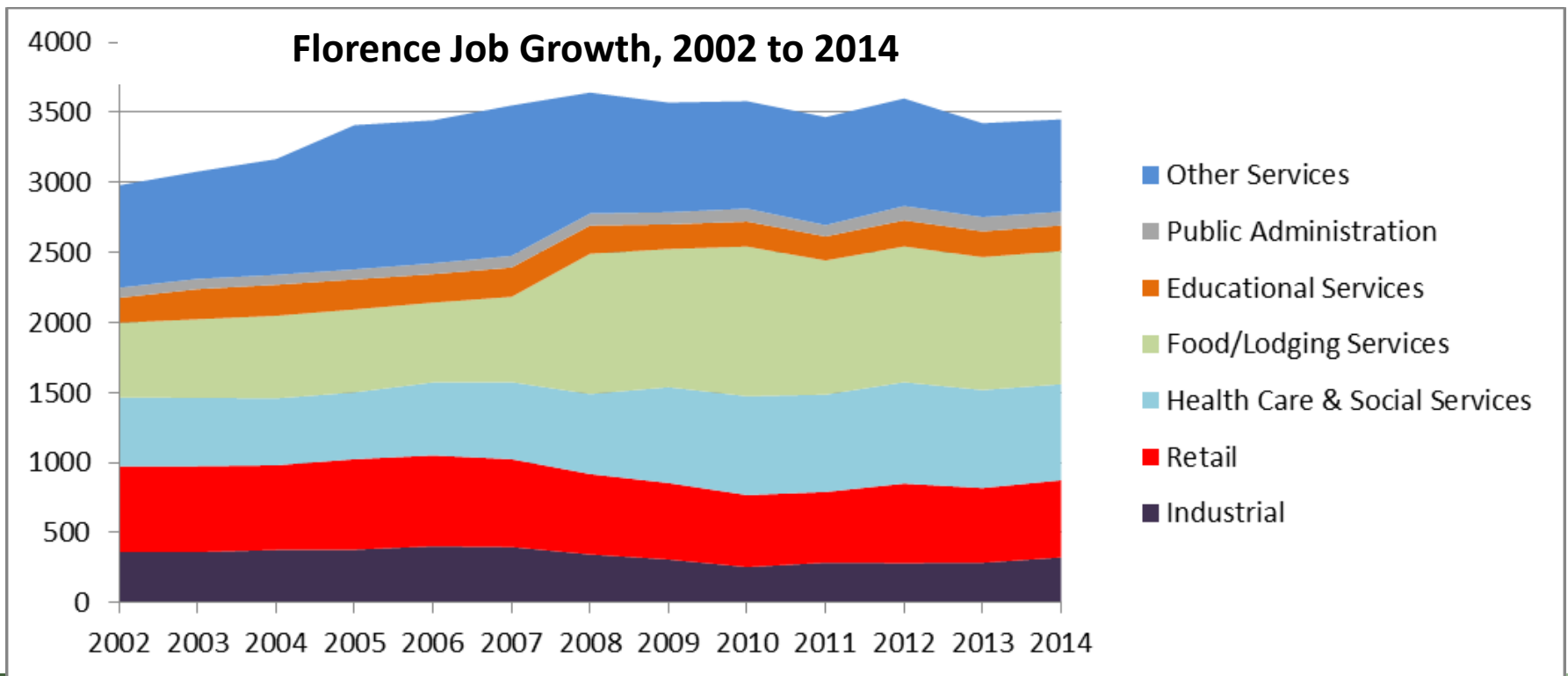
Name	Employment
Driftwood Shores Rental Pool	30-50
Bridgewater Restaurant	30-50
Willamette Valley Cancer Institute	30-50
McDonald's	30-50
Spruce Point	50-100
Mo's Restraunt	50-100
Regency Florence	50-100
Safeway	100-150
Fred Meyer	200-300
Peace Harbor Hospital	400-500

Source: OED.



Draft Economic Opportunity Findings

- ◆ Florence economy has not fully recovered from Great Recession
- ◆ Since 2010 most job gains attributed to retail , wholesale trade, construction and technical service sectors





Draft Economic Opportunity Findings

- ♦ Long term job gains attributed to lodging/food services, health care, real estate, public admin. and wholesale trade sectors

Florence Area Jobs by NAICS Industry Sector	2005 - 2014 Job Growth	2002	2014	2002 to 2014
Agriculture, Forestry, Fishing and Hunting		86	87	1
Utilities		20	25	5
Construction		187	127	(60)
Manufacturing		46	32	(14)
Wholesale Trade		15	28	13
Retail Trade		611	552	(59)
Transportation and Warehousing		9	24	15
Information		101	90	(11)
Finance and Insurance		102	94	(8)
Real Estate and Rental and Leasing		63	93	30
Professional, Scientific, and Technical Services		107	76	(31)
Management of Companies and Enterprises		27	10	(17)
Admin. & Support, Waste Mgmt. and Remediation		91	78	(13)
Educational Services		178	182	4
Health Care and Social Assistance		491	685	194
Arts, Entertainment, and Recreation		78	83	5
Accommodation and Food Services		534	951	417
Other Services (excluding Public Administration)		162	135	(27)
Public Administration		72	99	27
		2,980	3,451	471

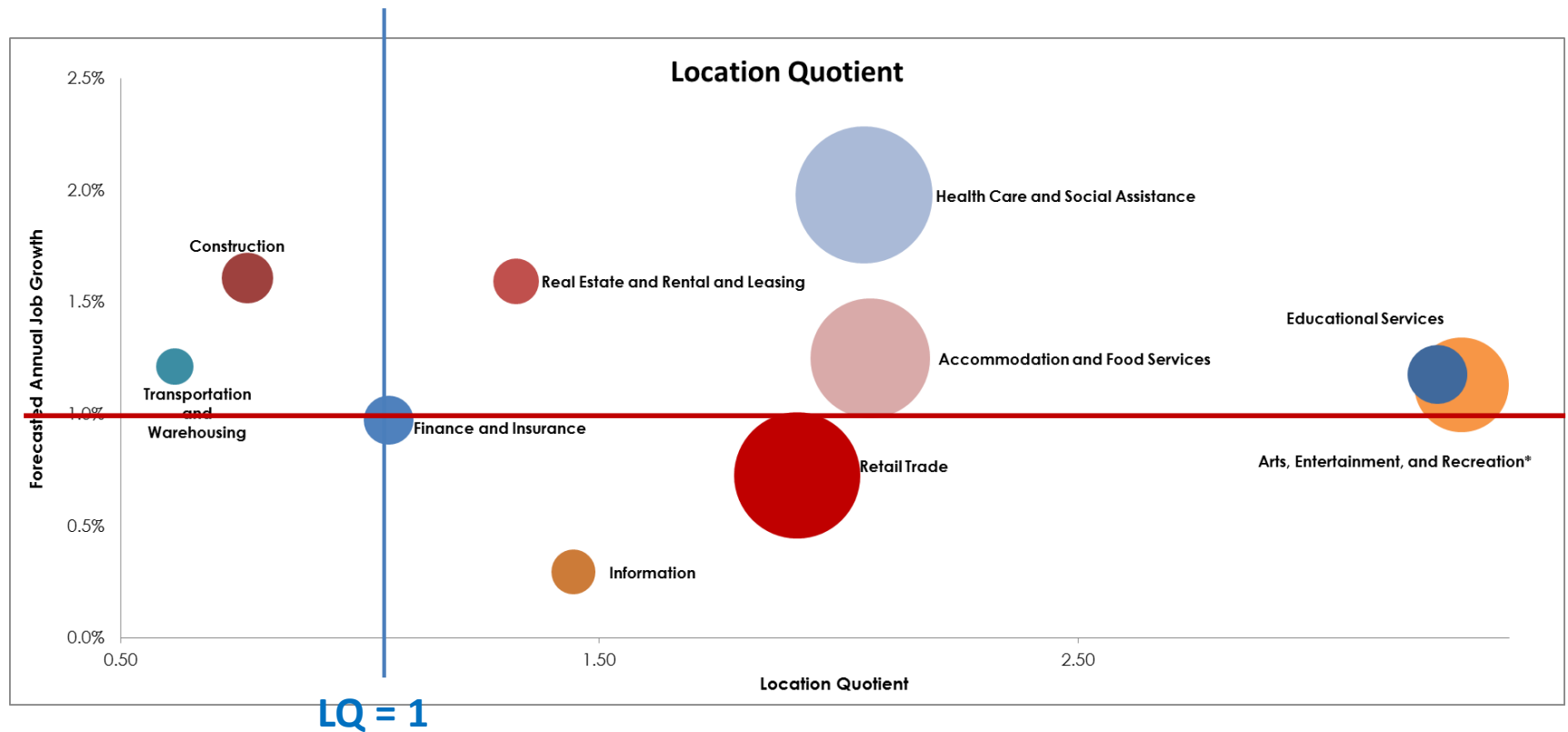
Source: US Census, On The Map, compiled by FCS GROUP.



Draft Economic Opportunity Findings

- ◆ Location Quotient: relative propensity of business concentrations
- ◆ Tourism, retail/services, health care , education, small business and retirees

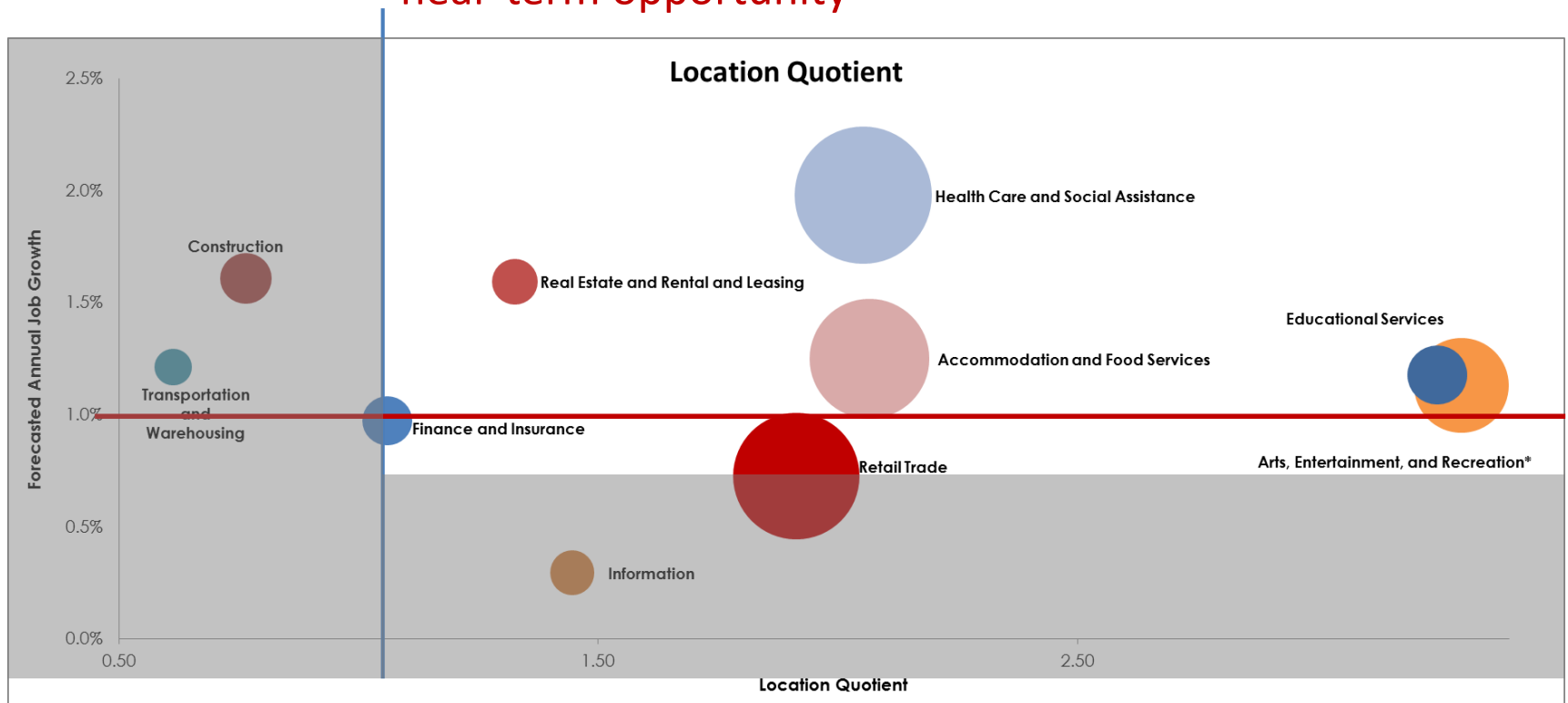
AGR
= 1%





Draft Economic Opportunity Findings

Existing local business clusters with greater than 1.0 LQ and above average growth rate forecast usually represent best near-term opportunity





Draft Economic Opportunity Findings

Florence Economic Development Strategy Target Employment Clusters				
Target Use	Market Potential	Potential Revenue Generation for Lincoln City	Potential Job Creation	Recommended Target Market in 2016 Strategy
Outdoor Gear	●	●	●	<input checked="" type="checkbox"/>
Craft Food/Beverages	●	●	●	<input checked="" type="checkbox"/>
Software/Information Technology	●	●	●	<input checked="" type="checkbox"/>
Forest Products	●	●	●	<input checked="" type="checkbox"/>
Health Care Services	●	●	●	<input type="checkbox"/>
Entrepreneurs	●		●	<input checked="" type="checkbox"/>
Lodging	●	●	●	<input type="checkbox"/>
Continuing Care Facilities	●		●	<input type="checkbox"/>
Arts/Entertainment (Destinations)	●		●	<input type="checkbox"/>
Others??				<input type="checkbox"/>
Legend: Good: ● Fair: ● Poor: ○				



Draft Economic Opportunity Findings

◆ Tourism spending continues to set records

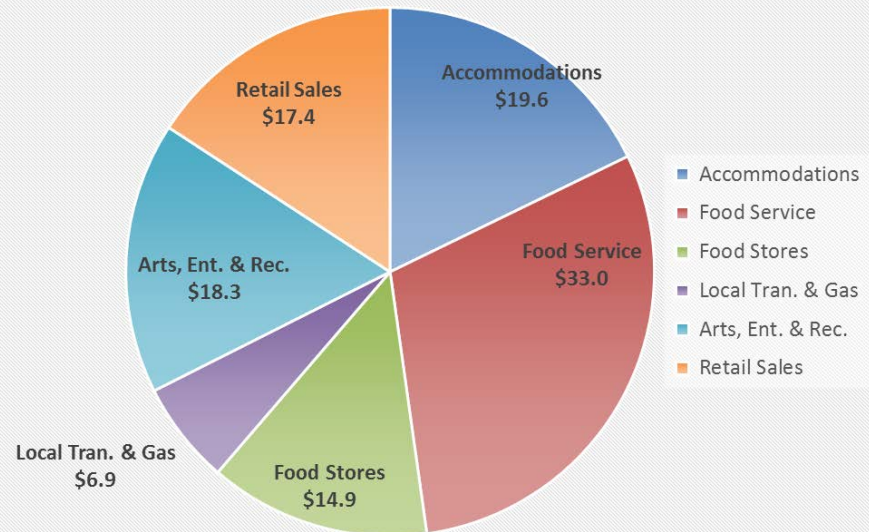
Western Lane County Visitor Spending by Commodity Purchased (\$ Million in 2015 dollars)

	2009	2010	2011	2012	2013	2014	2015	AGR
Accommodations	\$ 14.8	\$ 15.3	\$ 15.2	\$ 15.3	\$ 16.7	\$ 17.8	\$ 19.6	4.8%
Food Service	\$ 25.3	\$ 25.6	\$ 25.6	\$ 26.5	\$ 29.2	\$ 31.2	\$ 33.0	4.5%
Food Stores	\$ 12.3	\$ 12.1	\$ 12.4	\$ 12.7	\$ 13.6	\$ 14.3	\$ 14.9	3.2%
Local Tran. & Gas	\$ 6.2	\$ 7.1	\$ 8.2	\$ 8.2	\$ 8.4	\$ 8.2	\$ 6.9	1.8%
Arts, Ent. & Rec.	\$ 15.8	\$ 15.6	\$ 15.3	\$ 15.4	\$ 16.8	\$ 17.6	\$ 18.3	2.5%
Retail Sales	\$ 15.1	\$ 15.2	\$ 15.2	\$ 15.4	\$ 16.5	\$ 17.0	\$ 17.4	2.4%
Total	\$ 89.5	\$ 90.9	\$ 91.9	\$ 93.5	\$ 101.2	\$ 106.1	\$ 110.1	3.5%

Source: Dean Runyan Associates "Oregon Travel Impacts"
<http://www.deanrunyan.com/ORTravelImpa>

Draft analysis indicates demand for 350 new hotel rooms in Florence by year 2037

Western Lane County: 2015 Visitor Spending (\$ Million)





Draft Economic Opportunity Findings

- ◆ Florence 20-year job growth forecast = 1,082 new jobs
- ◆ Most growth expected in health/social services, small business/services, food/lodging, education and retail

Job Sector	2015 Jobs	AGR	2035 Jobs	Change
Industrial	259	1.31%	336	77
Retail	741	0.73%	856	115
Health Care & Social Services	874	1.98%	1,293	419
Food/Lodging Services	663	1.25%	850	187
Educational Services	165	1.18%	208	43
Public Administration	86	0.38%	93	7
Other Services	965	1.09%	1,199	234
Total	3,753	1.28%	4,835	1,082

Source: Oregon Emp. Dept. (OED, 2015); projections based on OED employment sector growth forecasts for Lane County; FCS GROUP.

Abbreviations: AGR = annual average growth rate. UGB = urban growth boundary.



Draft Economic Opportunity Findings

- ◆ Baseline 20-year employment land needs = 36+ buildable acres
- ◆ Plus 79,250 SF of building refill/redevelopment (16% of demand)

Projected Employment & Land Need, Lincoln City, 20-Year Forecast								
Scenario A: 20-year Employment Land Need, Florence UGB								
Job/Use Type	20-Year Job Growth Forecast ¹	Avg. FAR	Jobs Per Acre ²	Building Floor Area Per Job ²	20-Year Building Need (floor area SF)	Refill/ Redevelopment Share Capture	Refill/ Redevelopment Floor Area	20-Year Land Need (buildable acres) ³
Private Employment								
Industrial	77	0.15	10	1,500	115,000	0%	-	8.8
Services	883							
Lodging	37	0.25		1000	37,000	15%	5,550	3.3
Food Services	148	0.30		400	59,000	20%	11,800	4.2
Education Services	44	0.20		500	22,000	20%	4,400	2.3
Office/Other Services	654	0.30		300	196,000	20%	39,200	13.8
Retail (baseline growth)	115	0.30		500	58,000	30%	17,400	3.6
Private Subtotal	1,031				487,000		78,350	36.0
Government ⁴	7	0.30		500	3,000	30%	900	0.2
Total	1,038				490,000	16%	79,250	36.2

Notes:

¹ Excludes home-based workers.

² Assumptions for job densities reflect "covered jobs" and are generally consistent with Oregon DLCDC, Industrial and Other Employment Land Analysis Handbook, 2001.

³ Assumes net land area is adjusted upwards by 15% for public road circulation, easements and utilities.

⁴ Excludes special site requirements for city, school district, county, state and federal governments.

Source: FCS GROUP based on assumptions stated above.



Draft Economic Opportunity Findings

- ◆ Online retail sales will result in challenging times ahead for general retail stores
- ◆ Other possible “game changers” in Florence market area include ability to retain/attract:
 - ❖ Destination wellness center
 - ❖ Minor “elected” surgical procedure center
 - ❖ New senior care development(s)
 - ❖ RAIN incubator/accelerator
 - ❖ Spin off logging industries (Cross Laminated Timber)
 - ❖ Spin off arts and entertainment industries
 - ❖ CCC workforce training programs and enrollment
 - ❖ Others?

Economic Opportunity Analysis Questions and Discussion

Please Contact
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Florence EOA and HNA Buildable Land Inventory (BLI) Methodology White Paper¹

June 16, 2017

In accordance with OAR 660-024 and OAR 660-038, the existing supply of buildable land within Florence city limits and urban growth boundary (UGB) was inventoried and evaluated. Using the BLI methodology consistent with OAR 660024 and OAR 660-038, the Florence HNA and EOA includes a recent buildable land inventory completed by the consultant team using Geographic Information Systems (GIS) data that is consistent with the City of Florence and Lane County's vacant land assumption.

Florence's BLI is comprised of existing vacant and partially vacant (sub-dividable) tax lots as well as City-owned land that might be available for future development.

All tax lots within the Florence UGB have been classified into the following categories:

- **Unbuildable** – Land considered unbuildable per Lane County's GIS parcel database. Plus land that is either constrained by: (1) more than 90%, is deemed unbuildable by existing use (right of way, common land for home owner association, etc.); or (2) zoning disallows for future development (e.g., Parks, Open Space, Marine Water, Agricultural Conservation, and Timber Conservation zones).
- **Public** – Lands in public or semi-public ownership. Public lands where identified by Lincoln County's parcel GIS "exempt" description. There are two subcategories:
 - **Public** – Land in public ownership that is considered unavailable for future development such as land owned by the City, State, Tribes, etc.
 - **Public available** – Land identified as exempt but in private ownership, such as churches, Veterans, etc.
- **Vacant** – tax lots that are considered vacant per Lane County's 2017 GIS database.
- **Partially Vacant** – Tax lots that contain enough land to be subdivided without need of rezoning. There are four sub categories:
 - **Partially Vacant Residential** – Residential tax lots that have at least one-half acre of buildable land. For already developed tax lots, this amount was determined by subtracting one-quarter acre was subtracted from the buildable land to account for the existing dwelling. An aerial photography scan deemed existing multi-family parcels to be not well suited for subdividing and therefore not designated as partially vacant.

¹ This white paper was prepared by Fregonese Associates with input and analysis by FCS GROUP.

- **Partially Vacant Employment** – Parcels with commercial or industrial zoning that have at least two acres of buildable/unconstrained land. Aerial photography helped in determining the amount of buildable land.
- **Partial Vacant Public** – Parcels owned by public hand that have at least two acres of buildable/unconstrained land. Aerial photography helped in determining the amount of buildable land.
- **Partial Vacant Semi-Public** – Other parcels classified by the Lane County GIS database as “exempt” and owned by the public with at least two acres of buildable/unconstrained land. Aerial photography helped in determining the amount of buildable land.
- **Developed** – Tax lots in private ownership that are occupied by an existing building and cannot be subdivided under current zoning or redeveloped.
- **Redevelopable** – Developed tax lots with an improvement value that is lower than the land value with at least 10,000 square feet of unconstrained land.

Using the OAR BLI requirements, all significant environmental constraints are deducted from gross vacant land area to estimate buildable land area. These constraints include: open water (such as the Siuslaw River), wetlands, riparian buffers, floodways, slopes of more than 25 percent, as well as the 100-year floodplain.

It should be noted that there is some level of existing development along the Siuslaw River, and much of this area lies within the 100-year floodplain. Construction does happen within floodplains, and this analysis assumes that 50% of the floodplains are subject to future development. If parcels within the floodplain have additional constraints (such as slopes, wetlands, etc.) it is assumed that that parcel is not utilized for added development.

All GIS data used in this BLI analysis were provided by the City of Florence staff using Lane County GIS data, except for the steep slopes. Steep slopes were derived from 10-meter USGS Digital Elevation Model (DEMs). Light Detection and Ranging (LIDAR) data were also provided by the City but was found to have too much detail for a UGB-wide parcel-level analysis.

Key findings from the BLI for the City of Florence municipal boundary are provided in the attached appendix tables and include:

Overall Land Inventory Findings

- The City of Florence has 21 “base zones” and 14 “mixed use zones” within its current local development ordinance.
- There are 1,733.4 acres within the existing City municipal boundary spread out among 5,844 tax lots (parcels).

- Approx. 43% of the land area (748.8 ac.) within the City is already “developed” and 7% (129.9 acres) is considered to be unbuildable due to environmental constraints.
- Vacant buildable land area consists of 472 acres, including: 370 acres of private land, 88 acres of public land and 14 acres of land owned by semi-public/non-profit owners.
- Part-Vacant (sub-dividable) buildable land area includes 26 parcels with 88 acres, including: 14.5 acres of private land, 54 acres of public land and 20 acres of land owned by semi-public/non-profit owners.
- Redevelopment opportunities were identified for 222 parcels comprising a total of 150 acres of land area.

Buildable Inventory by General Land Use Findings

General land use categories have been assigned to each detailed zone classification (using assumptions shown in Appendix Table 6) to arrive at an overall estimate of existing buildable land within the City of Florence. The resulting findings are summarized in Table 1 and detailed by parcel size in Table 2. Approximately 719.8 acres are considered to be vacant, part vacant or redevelopable within the City of Florence.

- The majority of the BLI is classified as “vacant, private” with 370.2 acres of land area.
- The next largest category of the BLI consists of “redevelopable” land includes 150.3 acres
- “vacant, public/semi-public” owned land includes 101.8 acres
- “part vacant, public/semi-public” land includes 74 acres
- “part vacant, private” land includes 14.5 acres.

Table 1

Summary of BLI in City of Florence, 2017		
BLI Category	Acres	Dist.
Vacant, Private	370.2	52%
Vacant, Public	101.8	14%
Part Vacant, Private	14.5	2%
Part Vacant, Public	74.0	10%
Redevelopable	150.3	21%
Total	710.8	100%
Source: GIS analysis by Fregonese Associates; analysis by FCS GROUP.		

The distribution of the existing BLI by parcel size is shown below in Table 2. Please refer to the separate PowerPoint file for additional BLI results and maps.

Table 2

Buildable Land Inventory within City of Florence, 2017										
Residential Zones	Parcels					Acres				
Category	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	Subtotal Parcels	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	Subtotal Acres
Vacant, Private*	436	8	3	9	456	74.3	11.0	18.3	161.9	265.6
Vacant, Public/Semi Public*	37	2	0	0	39	7.7	1.8	0.0	0.0	9.5
Part Vacant, Private	11	6	0	0	17	3.4	3.6	0.0	0.0	7.0
Part Vacant, Public/Semi-Public	0	1	1	1	3	0.0	2.8	6.0	11.3	20.2
Redevelopable	88	2	1	0	91	25.6	4.6	0.0	0.0	30.2
Total	572	19	5	10	606	111.1	23.9	24.3	173.2	332.5
Employment Zones										
Category	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	Subtotal Parcels	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	Subtotal Acres
Vacant, Private*	234	14	1	1	250	51.1	23.4	7.0	13.3	94.8
Vacant, Public/Semi Public*	74	21	0	1	96	23.2	35.5	0.0	32.5	91.1
Part Vacant, Private	0	4	0	0	4	0.0	7.5	0.0	0.0	7.5
Part Vacant, Public/Semi-Public	0	0	0	2	2	0.0	0.0	0.0	53.8	53.8
Redevelopable	5	0	1	0	6	49.3	50.5	12.7	0.0	112.5
Total	313	39	2	4	358	123.7	116.8	19.7	99.6	359.8
Mixed Use Zones										
Category	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	Subtotal Parcels	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	Subtotal Acres
Vacant, Private*	9	1	1	0	11	1.9	2.8	5.1	0.0	9.8
Vacant, Public/Semi Public*	1	1	0	0	2	0.2	0.9	0.0	0.0	1.2
Part Vacant, Private	0	0	0	0	0	0.0	0.0	0.0	0.0	0.0
Part Vacant, Public/Semi-Public	0	0	0	0	0	0.0	0.0	0.0	0.0	0.0
Redevelopable	5	0	1	0	6	2.1	0.0	5.4	0.0	7.6
Total	15	2	2	0	19	4.3	3.7	10.6	0.0	18.5
Notes:										
* identified as vacant in Lane County assessor data										
Source: GIS analysis by Fregonese Associates; analysis by FCS GROUP.										

Appendix Table 1. Vacant Private-Owned Tax Lots and Acres in City of Florence, 2017

Vacant Parcels In the City of Florence, 2017		Parcels/ Tax Lots					Land Area (acres)				
Zoning Type:	Zoning Description	Vacant*				Subtotal Parcels	Vacant*				Subtotal Acres
		< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres		< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	
City of Florence Zoning:											
	AD AIRPORT DEVELOPMENT	2				2	0.2	0.0	0.0	0.0	0.22
	C COMMERCIAL	82				82	16.0	0.0	0.0	0.0	15.99
	CV COAST VILLAGE	11				11	1.2	0.0	0.0	0.0	1.23
	H HIGHWAY DISTRICT	48	4			52	11.8	8.0	0.0	0.0	19.74
	I PACIFIC VIEW BUSINESS PARK DISTRICT	2	1			3	0.9	1.4	0.0	0.0	2.32
	IP PACIFIC VIEW BUSINESS PARK DISTRICT	3				3	1.3	0.0	0.0	0.0	1.28
	LI LIMITED INDUSTRIAL	3				3	1.5	0.0	0.0	0.0	1.46
	M MARINE DISTRICT					-	0.0	0.0	0.0	0.0	-
	MH MOBILE HOME/MANUFACTURED HOME	39	1		2	42	8.9	1.9	0.0	35.2	45.99
	MSA MAIN STREET	15				15	1.9	0.0	0.0	0.0	1.87
	MSB MAIN STREET/AREA B	9				9	1.6	0.0	0.0	0.0	1.59
	NCD NORTH COMMERCIAL DISTRICT	4	1	1	1	7	2.1	4.4	7.0	13.3	26.82
	OS OPEN SPACE					-	0.0	0.0	0.0	0.0	-
	OTB OLD TOWN DISTRICT	4				4	0.7	0.0	0.0	0.0	0.72
	OTC OLD TOWN AREA C			1		1	0.0	0.0	5.1	0.0	5.13
	OTDA OLD TOWN DISTRICT/AREA A	5				5	1.2	0.0	0.0	0.0	1.19
	POI PROFESSIONAL OFFICE/INSTITUTIONAL	65	5			70	13.3	4.4	0.0	0.0	17.72
	RM MULTIPLE FAMILY RESIDENTIAL	135				135	14.5	0.0	0.0	0.0	14.54
	RR RESTRICTED RESIDENTIAL	165	3		2	170	35.7	2.5	0.0	17.6	55.81
	RS SINGLE FAMILY RESIDENTIAL	86	4	3	5	98	14.0	6.7	18.3	109.1	147.99
	SID SERVICE/INDUSTRIAL DISTRICT	1	3			4	0.6	5.2	0.0	0.0	5.82
	WF/M WATERFRONT/MARINE					-	0.0	0.0	0.0	0.0	-
						-	0.0	0.0	0.0	0.0	-
Multiple Zoning:	RM/C RM					-	0.0	0.0	0.0	0.0	-
	NCD/SID NCD		1			1	0.0	2.3	0.0	0.0	2.31
	SID		**			-	0.0	0.4	0.0	0.0	0.44
		679	23	5	10	717	127.4	37.1	30.4	175.2	370.2
	Notes:										
	* identified as vacant in Lane County assessor data										
	** tax lot with multiple zoning										
	Source: GIS analysis by Fregonese Associates; analysis by FCS GROUP.										

Appendix Table 2A. Vacant Public and Semi-Public (non-profit) Owned Tax Lots in City of Florence, 2017

Vacant Public and Semi-Public (non profit) Owned Parcels in the City of Florence, 2017			Public								Semi-Public								Subtotal Parcels
Parcels/Tax Lots	Zoning Type:	Zoning Description	Vacant*				Other (non vacant)				Vacant*				Other (non vacant)				
			< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	
City of Florence Zoning:																			
	AD	AIRPORT DEVELOPMENT	4	2					1										7
	C	COMMERCIAL	2				3	2		3				13			1		24
	CV	COAST VILLAGE												6					6
	H	HIGHWAY DISTRICT	8				4	1		1				5	4				23
	I	PACIFIC VIEW BUSINESS PARK DISTRICT	3	9															12
	IP	PACIFIC VIEW BUSINESS PARK DISTRICT	13	6			6							1					26
	LI	LIMITED INDUSTRIAL				1			1										2
	M	MARINE DISTRICT		1				1											2
	MH	MOBILE HOME/MANUFACTURED HOME					2	1						15					18
	MSA	MAIN STREET	5				1	2		3				2					13
	MSB	MAIN STREET/AREA B	1				7			2				1					11
	NCD	NORTH COMMERCIAL DISTRICT	4				1								1				6
	OS	OPEN SPACE	0				14	3	1										18
	OTB	OLD TOWN DISTRICT												2					2
	OTC	OLD TOWN AREA C	1	1				1											3
	OTDA	OLD TOWN DISTRICT/AREA A					8							3					11
	POI	PROFESSIONAL OFFICE/INSTITUTIONAL	3	1			1	1		22	2			8	6				44
	RM	MULTIPLE FAMILY RESIDENTIAL	7	1			5	4	2	2	9			13	3				46
	RR	RESTRICTED RESIDENTIAL	13				28	4	1	1	2			60	1				110
	RS	SINGLE FAMILY RESIDENTIAL	3	1			6	2		2	3			88					105
	SID	SERVICE/INDUSTRIAL DISTRICT																	-
	WF/M	WATERFRONT/MARINE	0				3	6		1									10
Multiple Zoning:																			
	RM/C	RM																	-
	RS/LI	RS					1												1
	AD/LI	AD								1									1
	RS/MH	RS								1									1
	MSB/MSA	MSB					1												1
	OTB/OTC	OTB																	-
	RR/RS	RR												1					1
			67	22	-	1	91	28	5	9	45	2	-	-	218	15	1	-	504
						90				133				47					234
Notes:																			
* identified as vacant in Lane County assessor data																			
Source: GIS analysis by Fregonese Associates; analysis by FCS GROUP.																			

Appendix Table 2B. Vacant Public and Semi-Public (non-profit) Owned Acres in City of Florence, 2017

Vacant Public and Semi-Public (non profit) Owned Parcels In the City of Florence, 2017																			
Buildable Acres			Public								Semi-Public								Acres
Zoning Type:	Zoning Description		Vacant				Other (non vacant)				Vacant				Other (non vacant)				
			< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	
City of Florence Zoning:																			
	AD	AIRPORT DEVELOPMENT	0.7	2.4					27.0										
	C	COMMERCIAL	0.4				1.0	0.0			0.9				3.7		6.0		
	CV	COAST VILLAGE													0.7				
	H	HIGHWAY DISTRICT	0.9				0.6	0.0			0.2				1.3	9.7			
	I	PACIFIC VIEW BUSINESS PARK DISTRICT	1.9	18.5															
	IP	PACIFIC VIEW BUSINESS PARK DISTRICT	8.0	7.9			3.5								0.4				
	LI	LIMITED INDUSTRIAL				32.5			6.4										
	M	MARINE DISTRICT		2.6				0.1											
	MH	MOBILE HOME/MANUFACTURED HOME					0.2	0.0							3.2				
	MSA	MAIN STREET	0.7				0.3	1.3			0.3				1.1				
	MSB	MAIN STREET/AREA B	0.1				1.8				0.4				0.4				
	NCD	NORTH COMMERCIAL DISTRICT	2.3				0.8									1.4			
	OS	OPEN SPACE					0.0	0.0	0.0										
	OTB	OLD TOWN DISTRICT													0.2				
	OTC	OLD TOWN AREA C	0.2	0.9				3.8											
	OTDA	OLD TOWN DISTRICT/AREA A					0.7								0.5				
	POI	PROFESSIONAL OFFICE/INSTITUTIONAL	1.3	1.4			0.0	1.9			5.3	2.7			1.7	10.1			
	RM	MULTIPLE FAMILY RESIDENTIAL	1.0	1.1			1.5	5.5	0.2	0.1	3.1				4.2	4.5			
	RR	RESTRICTED RESIDENTIAL	1.8				2.4	0.0	0.0	0.0	0.7				13.0	0.6			
	RS	SINGLE FAMILY RESIDENTIAL	0.5	0.8			0.4	3.9		0.0	0.6				17.4				
	SID	SERVICE/INDUSTRIAL DISTRICT																	
	WF/M	WATERFRONT/MARINE					0.0	0.0		0.0									
Multiple Zoning:	RM/C	RM																	
	RS/LI	RS					0.2												
		LI					0.2												
	MSB/MSA	MSB					0.0												
		MSA					0.0												
		Total	19.7	35.6	0.0	32.5	13.7	16.5	6.6	27.1	11.4	2.7	0.0	0.0	47.7	26.3	6.0	0.0	
						87.7				63.9				14.1				79.9	
Notes:	* identified as vacant in Lane County assessor data																		
	Source: GIS analysis by Fregonese Associates; analysis by FCS GROUP.																		

Appendix Table 3B. Part-Vacant Acres in City of Florence, 2017

PartVacant Parcels In the City of Florence, 2017		Partial Vacant																
Buildable Acres		Residential				Employment				Public				Semi-Public				Subtotal
Zoning Type	Zoning Description	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	Acres
City of Florence Zoning:																		
AD	AIRPORT DEVELOPMENT												25.1602					25.16
C	COMMERCIAL																	-
CV	COAST VILLAGE																	-
H	HIGHWAY DISTRICT						1.5											1.50
I	PACIFIC VIEW BUSINESS PARK DISTRICT																	-
IP	PACIFIC VIEW BUSINESS PARK DISTRICT						2.0303											2.03
LI	LIMITED INDUSTRIAL																	-
M	MARINE DISTRICT												28.6546					28.65
MH	MOBILE HOME/MANUFACTURED HOME																	-
MSA	MAIN STREET																	-
MSB	MAIN STREET/AREA B																	-
NCD	NORTH COMMERCIAL DISTRICT						2											2.00
OS	OPEN SPACE																	-
OTB	OLD TOWN DISTRICT																	-
OTC	OLD TOWN AREA C																	-
OTDA	OLD TOWN DISTRICT/AREA A																	-
POI	PROFESSIONAL OFFICE/INSTITUTIONAL																	-
RM	MULTIPLE FAMILY RESIDENTIAL														2.8182		11.35	14.17
RR	RESTRICTED RESIDENTIAL	2.23285	1.59276														6	9.83
RS	SINGLE FAMILY RESIDENTIAL	1.21202	1.97776															3.19
SID	SERVICE/INDUSTRIAL DISTRICT						2											2.00
WF/M	WATERFRONT/MARINE																	-
																		-
		3.44	3.57	-	-	-	7.53	-	-	-	-	-	53.81	-	2.82	6.00	11.35	88.53
	Notes:				7.02				7.53				53.81				20.17	88.53
	Source: GIS analysis by Fregonese Associates; analysis by FCS GROUP.																	

Appendix Table 4A. Re-developable Tax Lots in City of Florence, 2017

PartVacant Parcels In the City of Florence, 2017			Redevelopable*								Subtotal Parcels
Parcels/Tax Lots	Zoning Type:	Zoning Description	Ratio <= 0.5 (High Chance)				Ratio <=1 (Moderate Chance)				
			< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	
City of Florence Zoning:											
	AD	AIRPORT DEVELOPMENT									-
	C	COMMERCIAL	14				11	1			26
	CV	COAST VILLAGE	4				1				5
	H	HIGHWAY DISTRICT	25	10	1		21	6			63
	I	PACIFIC VIEW BUSINESS PARK DISTRICT									-
	IP	PACIFIC VIEW BUSINESS PARK DISTRICT									-
	LI	LIMITED INDUSTRIAL									-
	M	MARINE DISTRICT									-
	MH	MOBILE HOME/MANUFACTURED HOME	21				6				27
	MSA	MAIN STREET	10	1			10	2			23
	MSB	MAIN STREET/AREA B	1	1			2				4
	NCD	NORTH COMMERCIAL DISTRICT	3				1	2			6
	OS	OPEN SPACE									-
	OTB	OLD TOWN DISTRICT	2				1				3
	OTC	OLD TOWN AREA C			1						1
	OTDA	OLD TOWN DISTRICT/AREA A	1				1				2
	POI	PROFESSIONAL OFFICE/INSTITUTIONAL									-
	RM	MULTIPLE FAMILY RESIDENTIAL	3	1			2	1			7
	RR	RESTRICTED RESIDENTIAL	1				4				5
	RS	SINGLE FAMILY RESIDENTIAL	24		1		22				47
	SID	SERVICE/INDUSTRIAL DISTRICT		2				1			3
	WF/M	WATERFRONT/MARINE									-
			109	15	3	-	82	13	-	-	222
	Notes:					127				95	
	* depicts ratio of tax lot improvement to land value.										
	Source: GIS analysis by Fregonese Associates; analysis by FCS GROUP.										

Appendix Table 4B. Re-developable Acres in City of Florence, 2017

PartVacant Parcels In the City of Florence, 2017			Redevelopable*							Acres	
Buildable Acres	Zoning Type:	Zoning Description	Ratio <= 0.5				Ratio <= 1				
			< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	< 1 acre	1 to 5 acres	5 to 10 acres		> 10 acres
City of Florence Zoning:											
	AD	AIRPORT DEVELOPMENT									-
	C	COMMERCIAL	6.43				4.83	1.30			12.56
	CV	COAST VILLAGE	1.09				0.26				1.34
	H	HIGHWAY DISTRICT	14.18	22.61	4.66		10.93	9.38			61.75
	I	PACIFIC VIEW BUSINESS PARK DISTRICT									-
	IP	PACIFIC VIEW BUSINESS PARK DISTRICT									-
	LI	LIMITED INDUSTRIAL									-
	M	MARINE DISTRICT									-
	MH	MOBILE HOME/MANUFACTURED HOME	5.45				1.64				7.09
	MSA	MAIN STREET	4.07	1.64			4.39	4.26			14.36
	MSB	MAIN STREET/AREA B	0.36	1.01			0.65				2.02
	NCD	NORTH COMMERCIAL DISTRICT	2.55				0.94	2.74			6.23
	OS	OPEN SPACE									-
	OTB	OLD TOWN DISTRICT	1.01				0.63				1.64
	OTC	OLD TOWN AREA C			5.44						5.44
	OTDA	OLD TOWN DISTRICT/AREA A	0.24				0.24				0.49
	POI	PROFESSIONAL OFFICE/INSTITUTIONAL									-
	RM	MULTIPLE FAMILY RESIDENTIAL	1.28	3.06			1.38	1.55			7.27
	RR	RESTRICTED RESIDENTIAL	0.24				1.48				1.72
	RS	SINGLE FAMILY RESIDENTIAL	6.69				6.11				12.80
	SID	SERVICE/INDUSTRIAL DISTRICT		5.40	8.09			2.13			15.62
	WF/M	WATERFRONT/MARINE									-
											-
		Total	43.59	33.72	18.18	-	33.47	21.36	-	-	150.31
	Notes:					95.49				54.83	150.31
	* depicts ratio of tax lot improvement to land value.										
	Source: GIS analysis by Fregonese Associates; analysis by FCS GROUP.										

Appendix Table 5B. Unbuildable and Developed Acres in City of Florence, 2017

Unbuildable and Developed Parcels In the City of Florence, 2017											
Acres											
City of Florence Zoning:	Zoning Type:	Zoning Description	Developed				Unbuildable				Acres
			< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	
	AD	AIRPORT DEVELOPMENT	0.1				0.0				0.2
	C	COMMERCIAL	22.2	1.8			0.3	3.6			27.9
	CV	COAST VILLAGE	27.0				1.2	6.2			34.4
	H	HIGHWAY DISTRICT	22.7	11.1			0.0				33.9
	I	PACIFIC VIEW BUSINESS PARK DISTRICT	0.8	1.3							2.1
	IP	PACIFIC VIEW BUSINESS PARK DISTRICT	4.0	2.6							6.5
	LI	LIMITED INDUSTRIAL	7.8								7.8
	M	MARINE DISTRICT									0.0
	MH	MOBILE HOME/MANUFACTURED HOME	52.0		5.8		1.6	1.8			61.2
	MSA	MAIN STREET	9.1	3.7							12.7
	MSB	MAIN STREET/AREA B	9.5				0.0				9.5
	NCD	NORTH COMMERCIAL DISTRICT	1.5			10.2					11.7
	OS	OPEN SPACE									0.0
	OTB	OLD TOWN DISTRICT	7.0				0.7				7.6
	OTC	OLD TOWN AREA C		1.0					0.5		1.5
	OTDA	OLD TOWN DISTRICT/AREA A	7.8				2.5				10.4
	POI	PROFESSIONAL OFFICE/INSTITUTIONAL	5.1	2.5			2.3				10.0
	RM	MULTIPLE FAMILY RESIDENTIAL	61.0	5.9			4.3	2.5			73.7
	RR	RESTRICTED RESIDENTIAL	208.8	1.0			2.3	15.8	0.4	0.6	228.9
	RS	SINGLE FAMILY RESIDENTIAL	254.0				9.8	42.3	15.5	15.0	336.7
	SID	SERVICE/INDUSTRIAL DISTRICT	1.0				0.4				1.4
	WF/M	WATERFRONT/MARINE	0.2				0.2				0.4
		Total	701.7	31.0	5.8	10.2	25.8	72.1	16.5	15.6	878.7
	Notes:					<u>748.8</u>				<u>129.9</u>	878.7
		Source: GIS analysis by Fregonese Associates; analysis by FCS GROUP.									

Appendix Table 6. Land Use Zoning Category Assignment Assumptions

City of Florence Zoning:			
	AD	Emp.	AIRPORT DEVELOPMENT
	C	Emp.	COMMERCIAL
	CV	Res.	COAST VILLAGE
	H	Emp.	HIGHWAY DISTRICT
	I	Emp.	PACIFIC VIEW BUSINESS PARK DISTRICT
	IP	Emp.	PACIFIC VIEW BUSINESS PARK DISTRICT
	LI	Emp.	LIMITED INDUSTRIAL
	M	Emp.	MARINE DISTRICT
	MH	Res.	MOBILE HOME/MANUFACTURED HOME
	MSA	Emp.	MAIN STREET
	MSB	Emp.	MAIN STREET/AREA B
	NCD	Emp.	NORTH COMMERCIAL DISTRICT
	OS	Open Space	OPEN SPACE
	OTB	Mixed	OLD TOWN DISTRICT
	OTC	Mixed	OLD TOWN AREA C
	OTDA	Mixed	OLD TOWN DISTRICT/AREA A
	POI	Emp.	PROFESSIONAL OFFICE/INSTITUTIONAL
	RM	Res.	MULTIPLE FAMILY RESIDENTIAL
	RR	Res.	RESTRICTED RESIDENTIAL
	RS	Res.	SINGLE FAMILY RESIDENTIAL
	SID	Emp.	SERVICE/INDUSTRIAL DISTRICT
	WF/M	Emp.	WATERFRONT/MARINE
Multiple Zoning:	RM/C		RM
		Mixed	C
	RS/H	Mixed	RS
		Mixed	H
	RS/LI	Mixed	RS
		Mixed	LI
	AD/LI	Mixed	AD
		Mixed	LI
	RS/M	Mixed	RS
		Mixed	M
	RS/MH	Mixed	RS
		Mixed	MH
	MSB/MSA	Mixed	MSB
		Mixed	MSA
	OTB/OTC	Mixed	OTB
		Mixed	OTC
	MSB/RM	Mixed	MSB
		Mixed	RM
	H/RM	Mixed	H
		Mixed	RM
	RR/RS	Mixed	RR
		Mixed	RS
	RS/RM	Mixed	RS
		Mixed	RM
	MH/RS	Mixed	MH
		Mixed	RS
	NCD/SID	Mixed	NCD
		Mixed	SID
		Mixed	

Florence Buildable Land Inventory Analysis

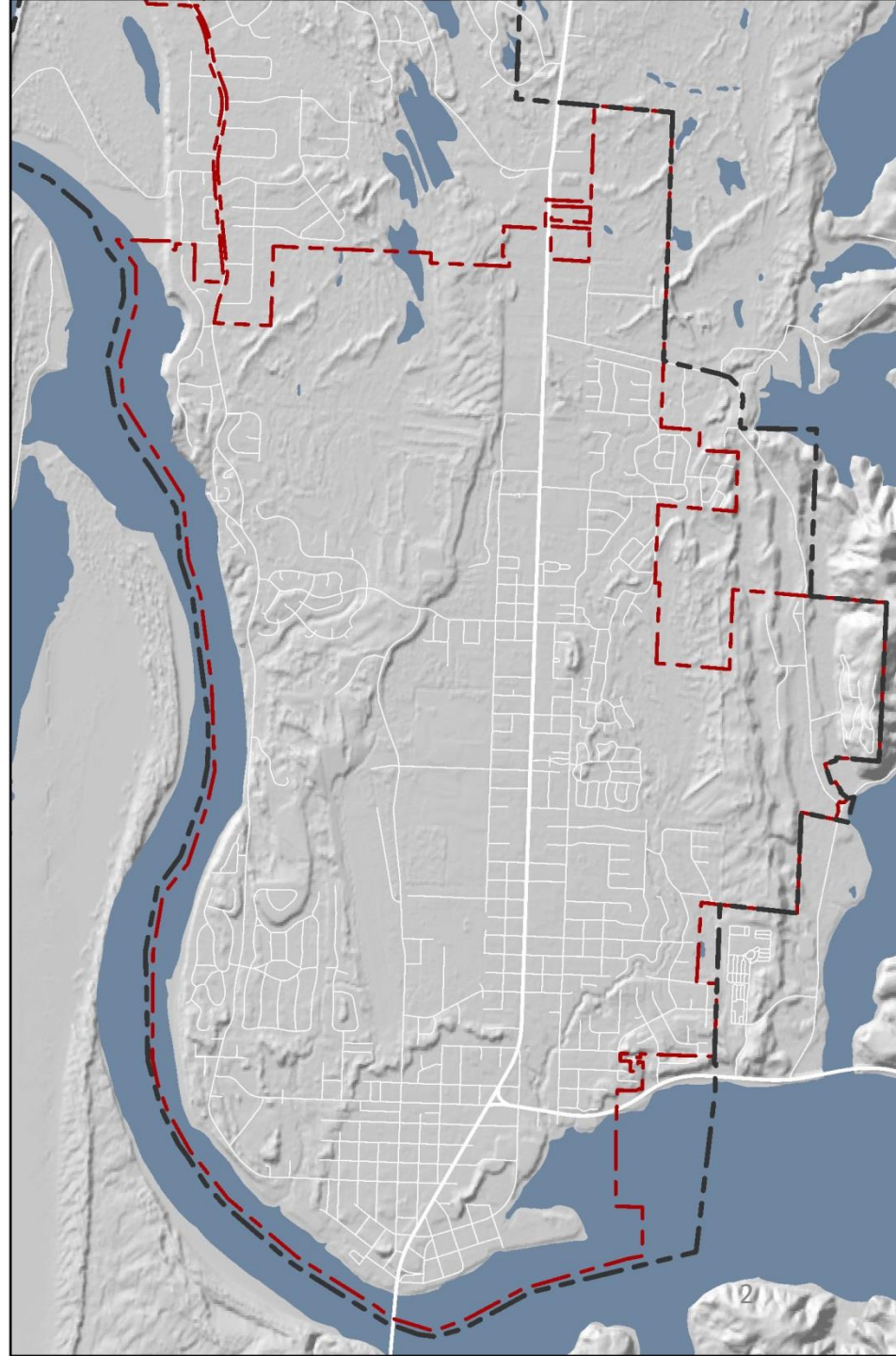
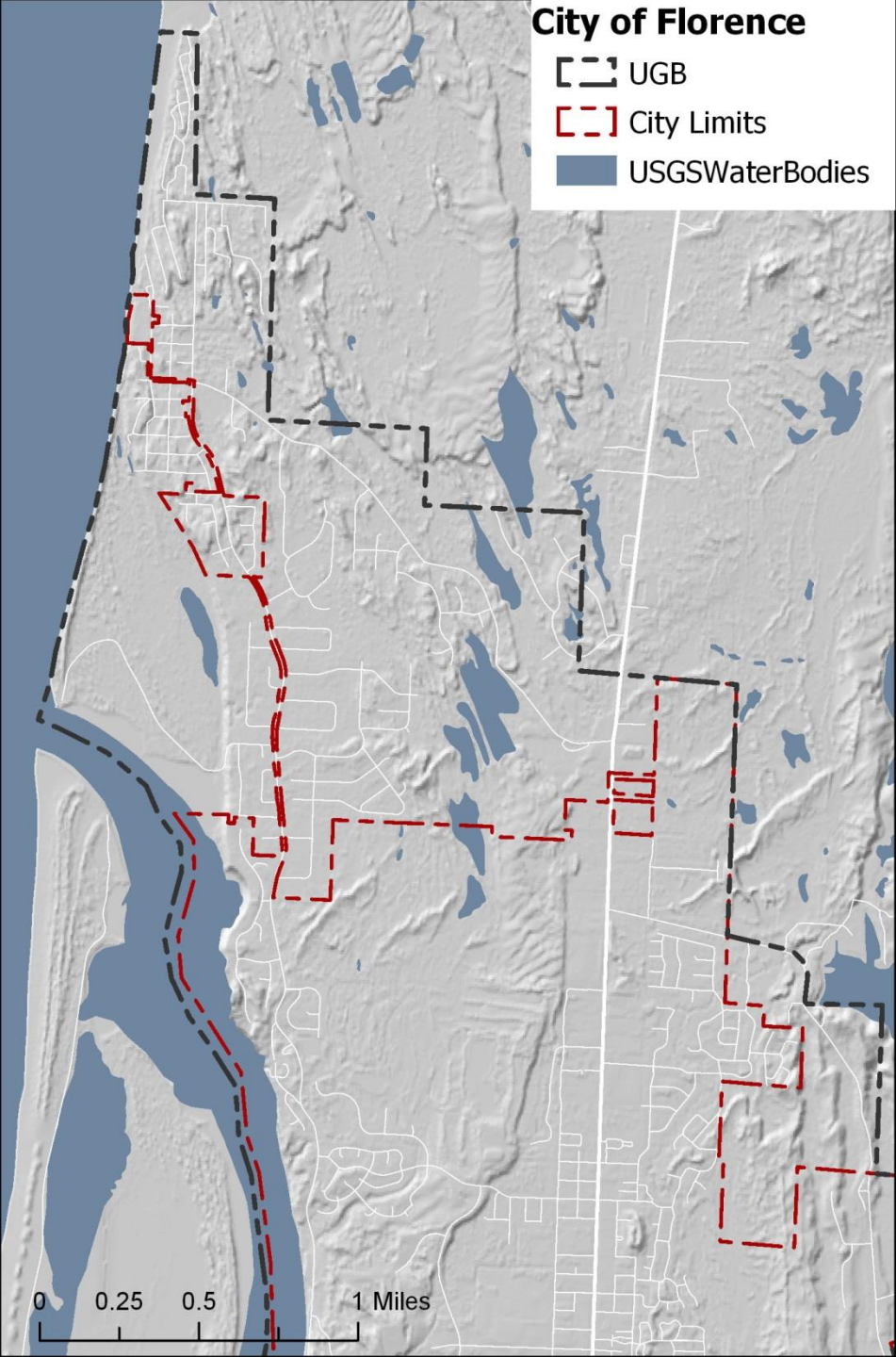
Draft 6/16/17

Prepared by Fregonese Associates, Inc.

FCS GROUP

City of Florence

- UGB
- City Limits
- USGSWaterBodies



Constraints/Unbuildable Land

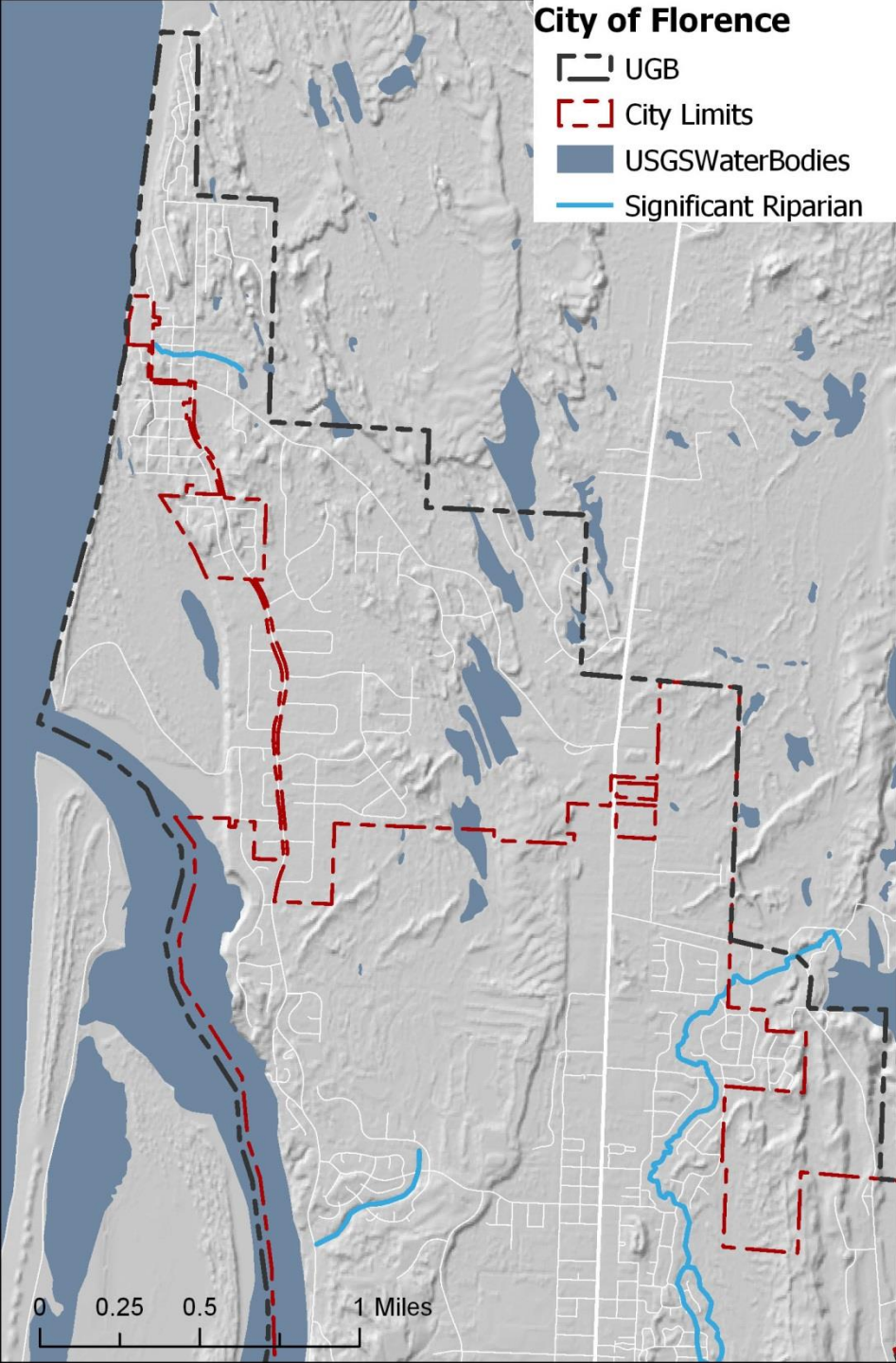
- City of Florence data sets:
 - Goal 5
 - Significant Riparian
 - Significant Wetlands
 - 100-Year Floodplain
 - Open Water
 - General Wetlands
 - Streams
 - Parks and Open Space
- Additional data:
 - USGS seamless – Steep Slopes
 - Coastline and shorelines

Constraints/Unbuildable Land

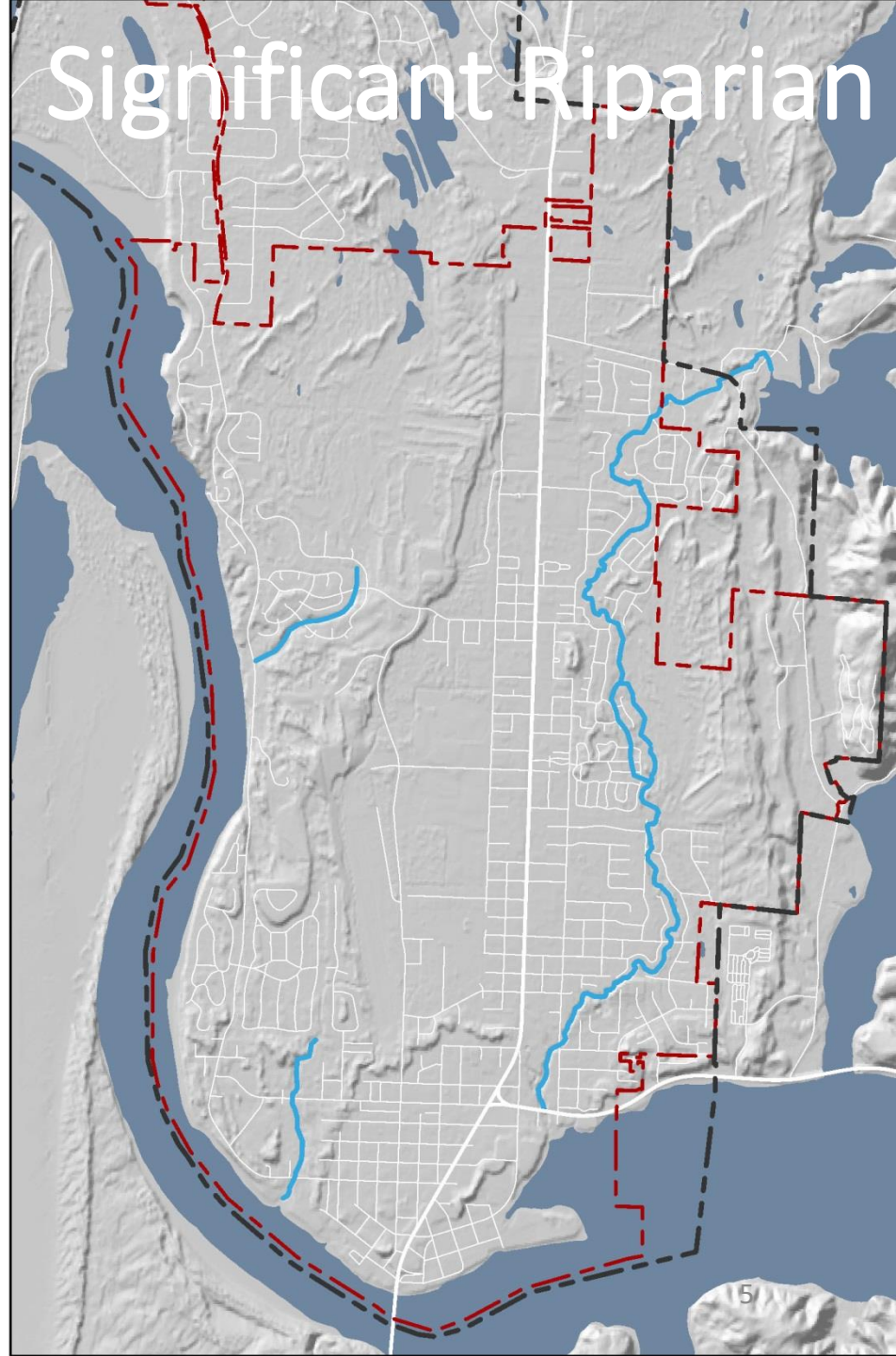
- Goal 5
 - Significant Riparian – plus 50ft buffer
 - Significant Wetlands – plus 50ft buffer
- Open Water – plus 25ft buffer
- Streams – plus 25ft buffer
- General Wetlands – plus 25ft buffer
- Slopes over 25%
- Coastline
- Parks and open space
- 100-Year Floodplain – allow for 50% of land to be build

City of Florence

- UGB
- City Limits
- USGS Water Bodies
- Significant Riparian

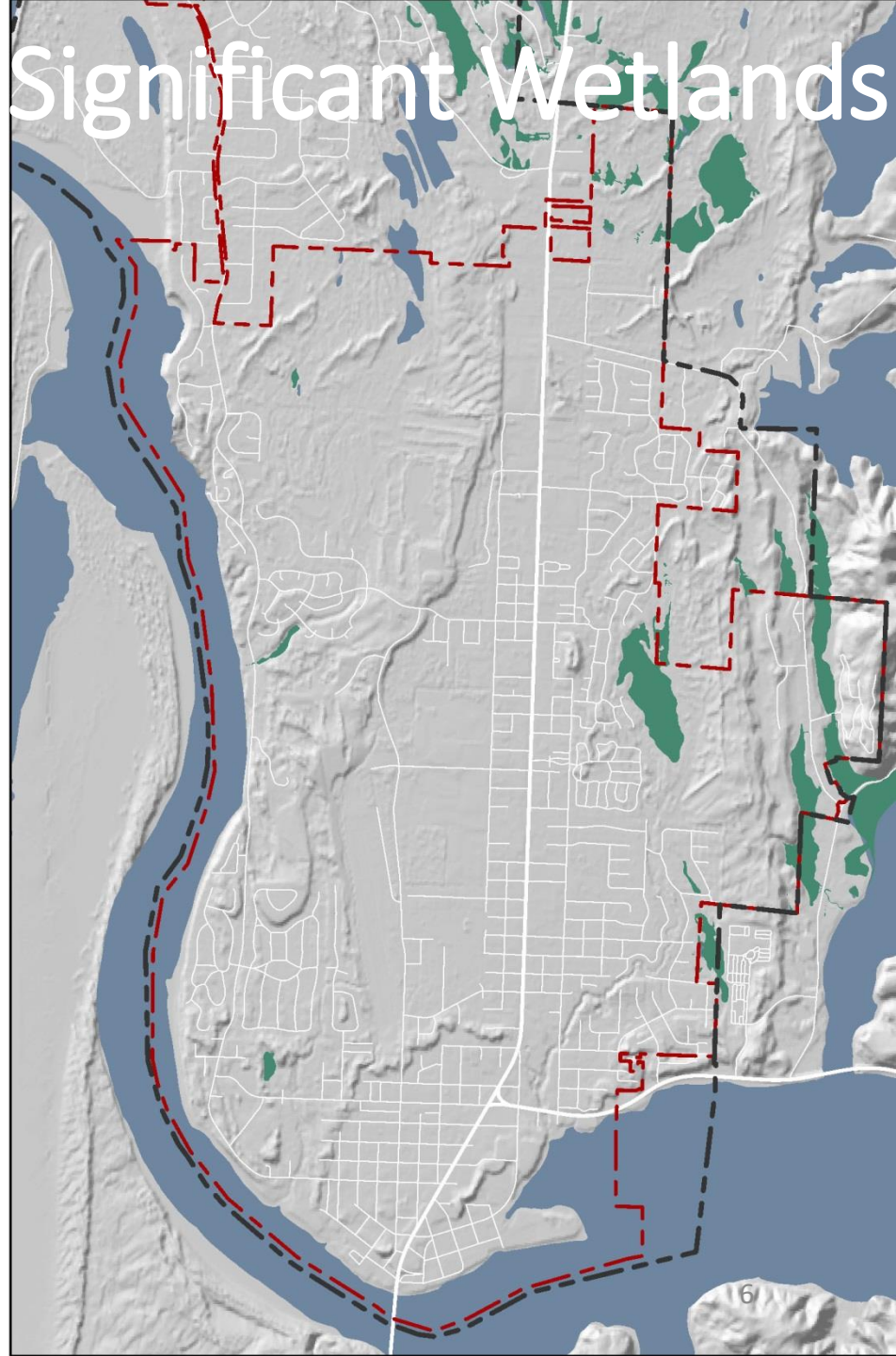
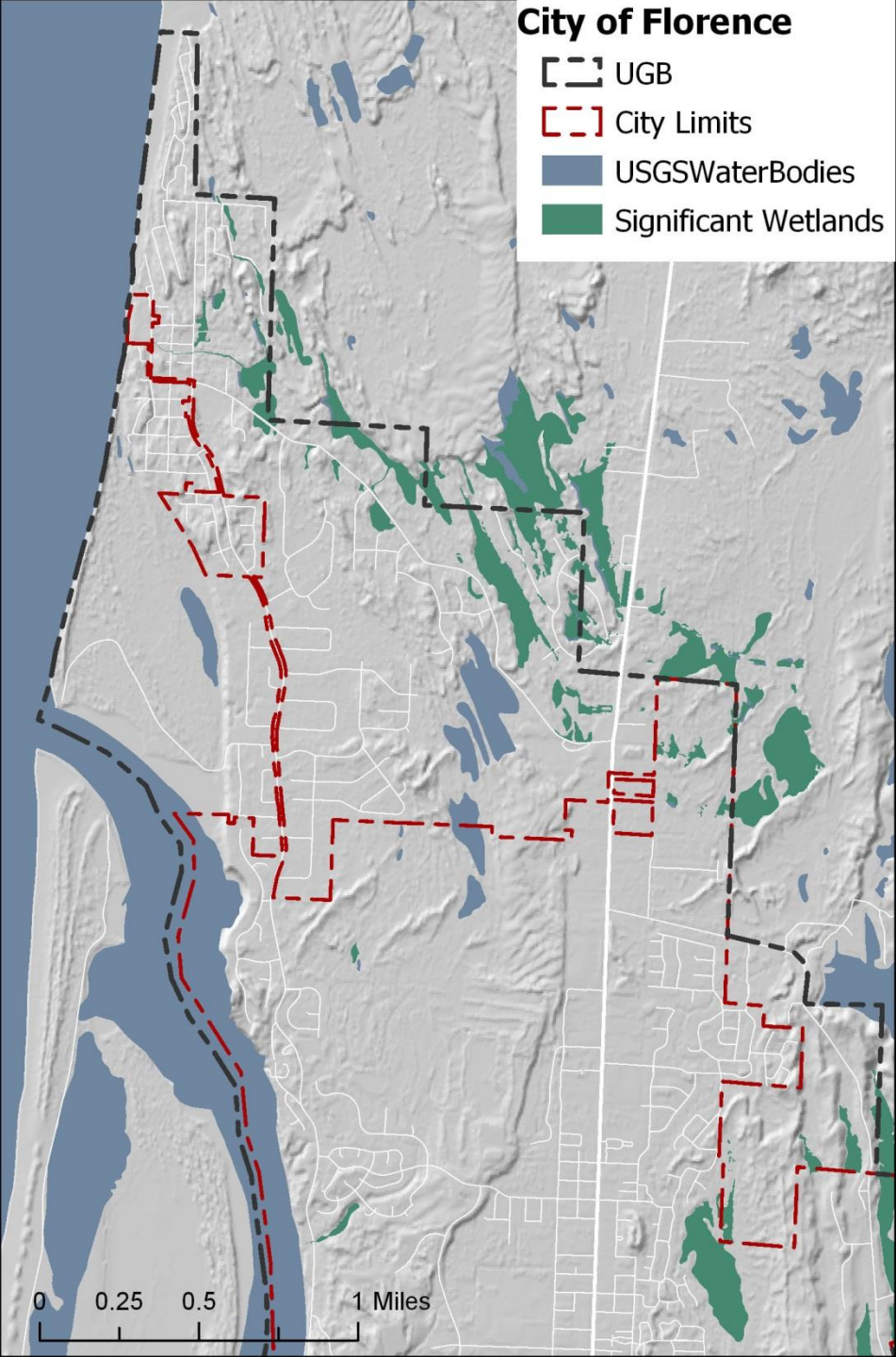


Significant Riparian



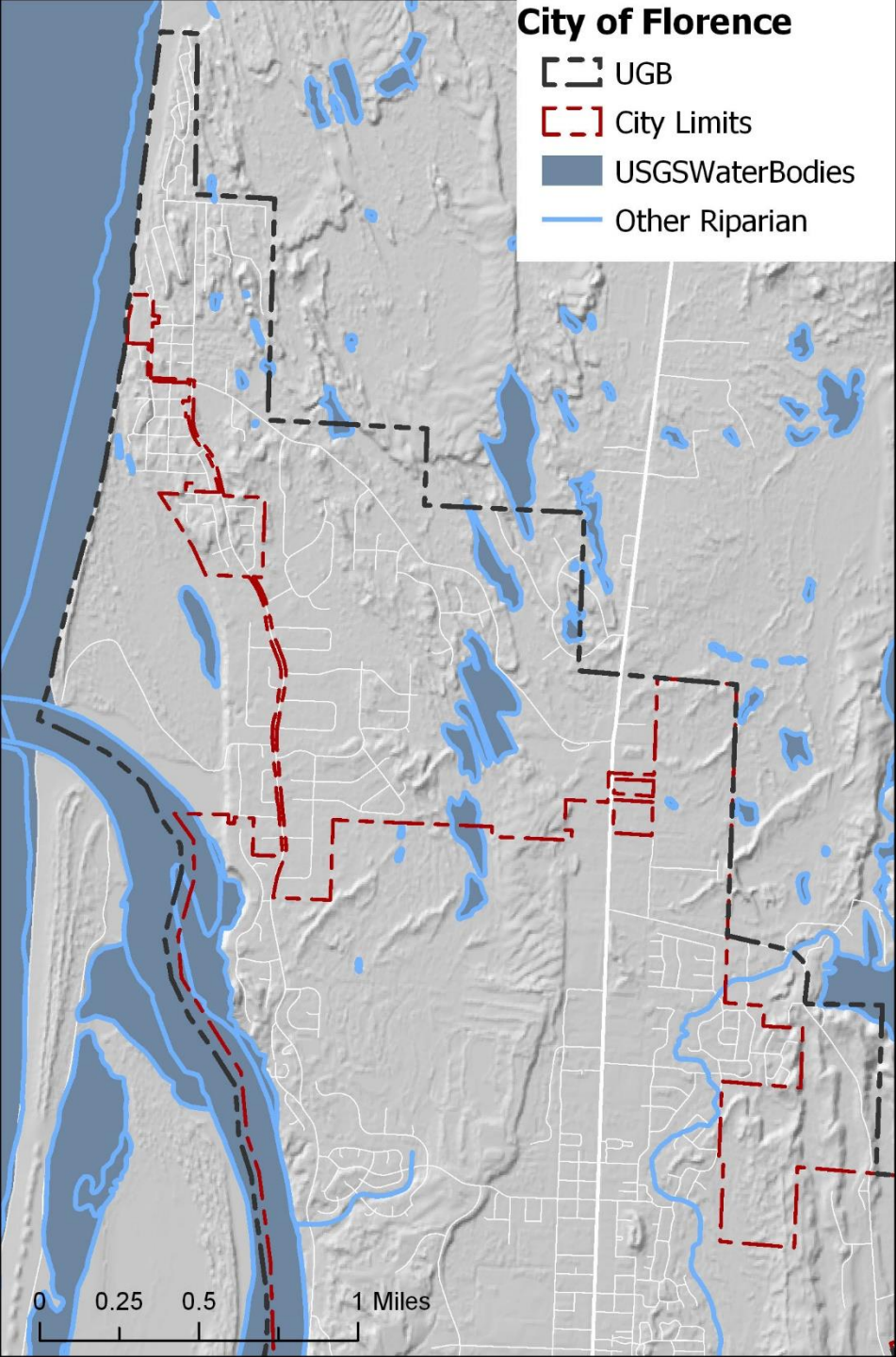
City of Florence

- [- -] UGB
- [--] City Limits
- USGS Water Bodies
- Significant Wetlands

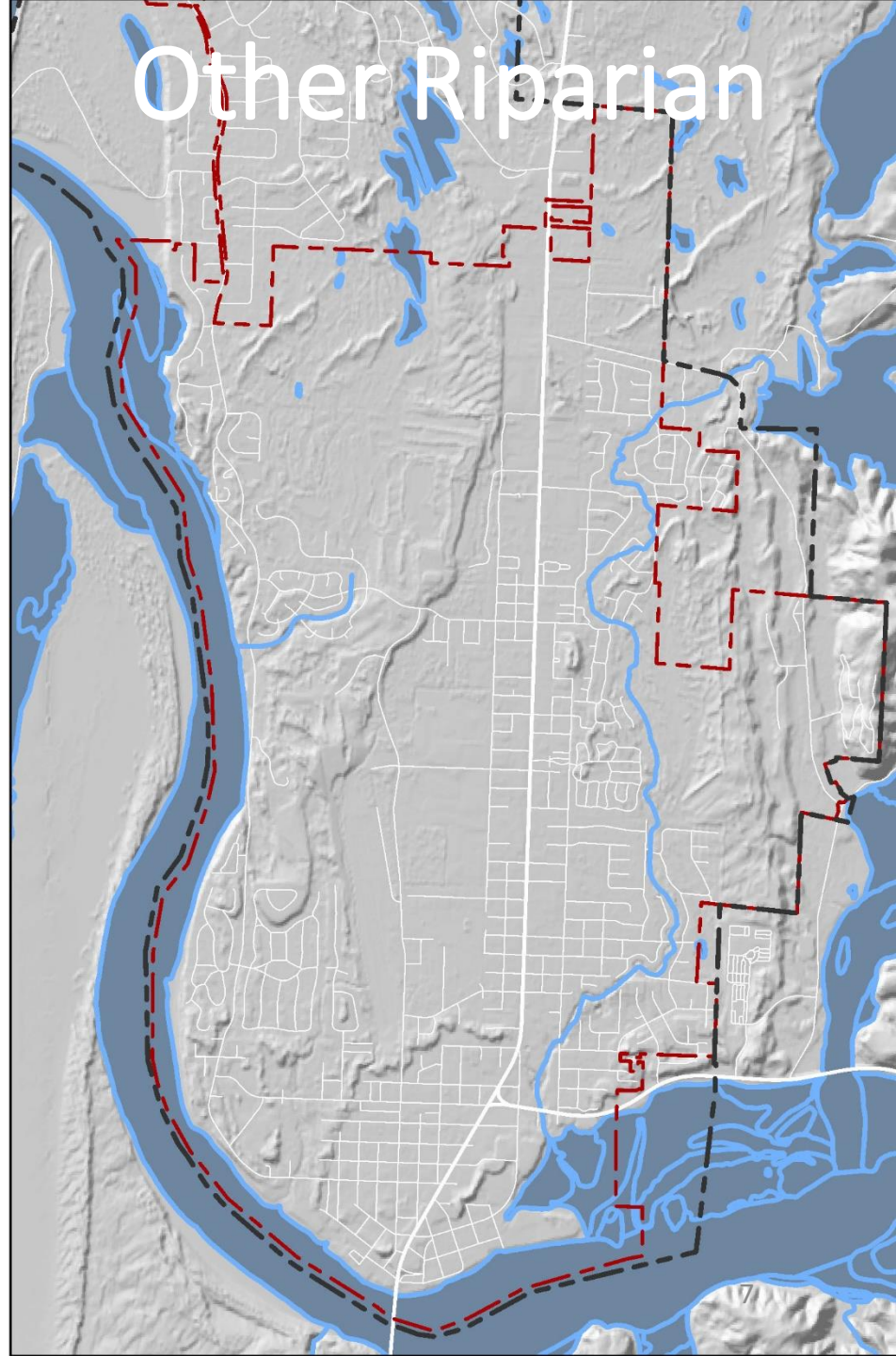


City of Florence

- [- -] UGB
- [--] City Limits
- USGSWaterBodies
- Other Riparian

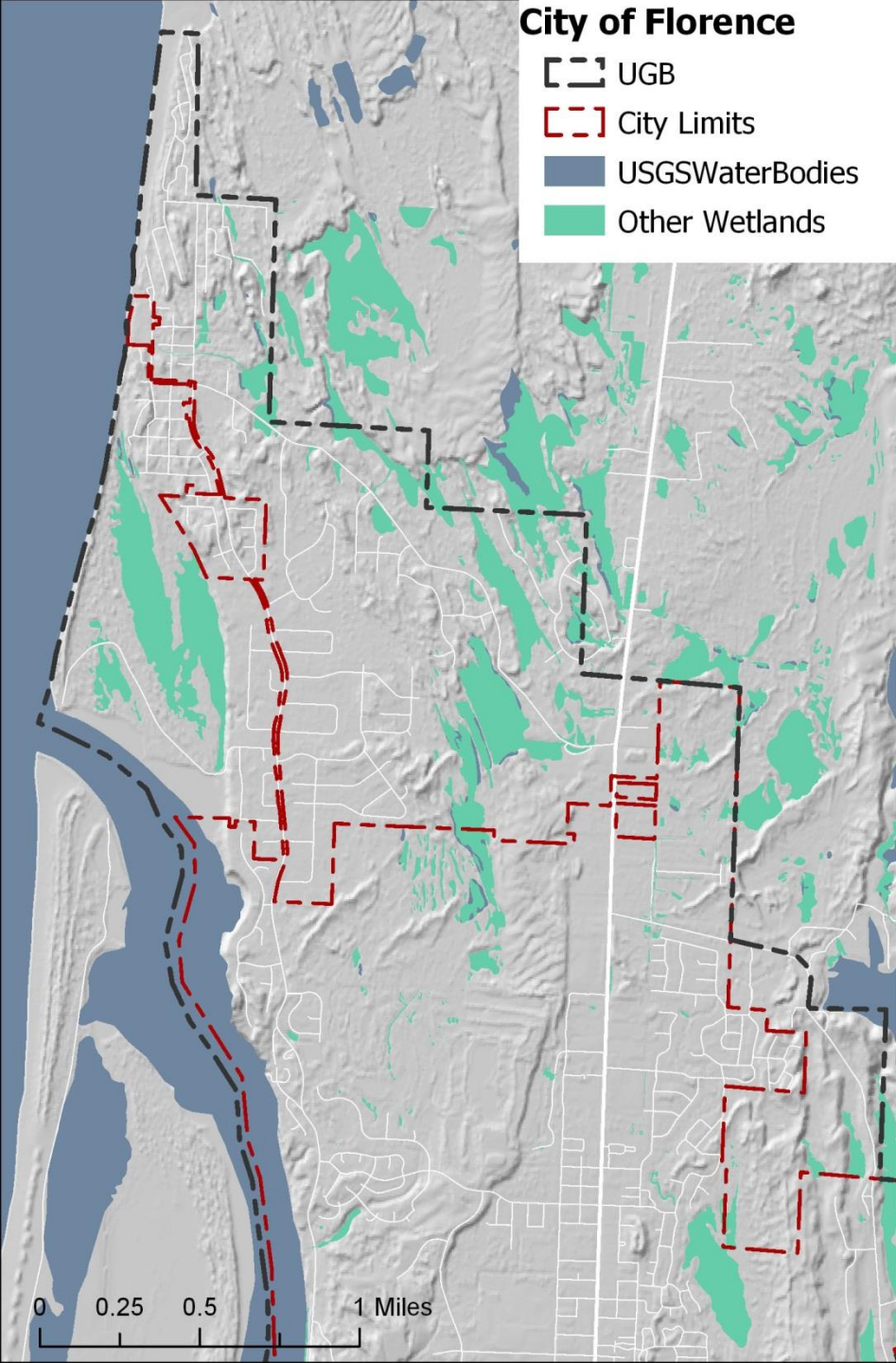


Other Riparian

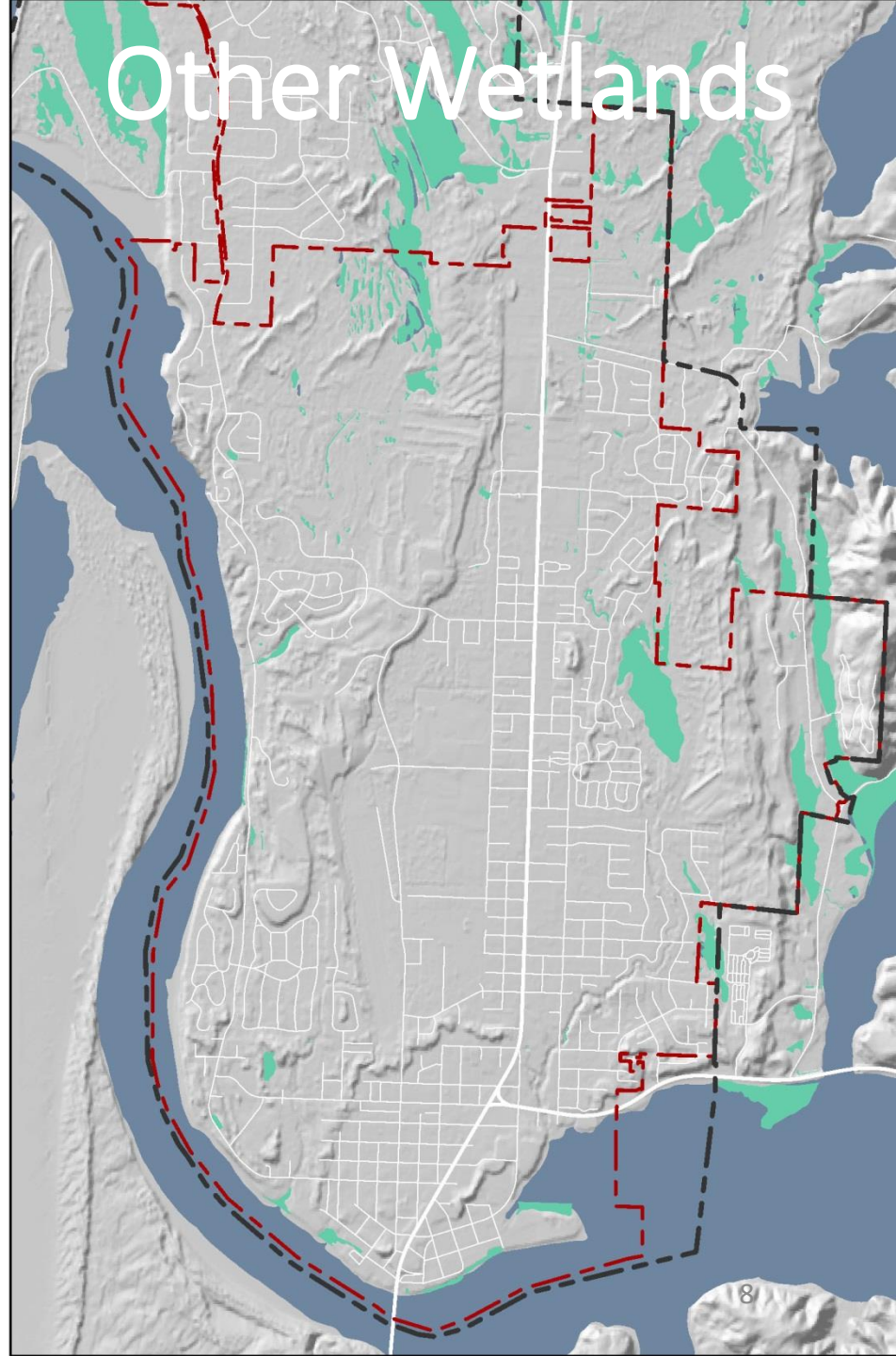


City of Florence

- UGB
- City Limits
- USGS Water Bodies
- Other Wetlands

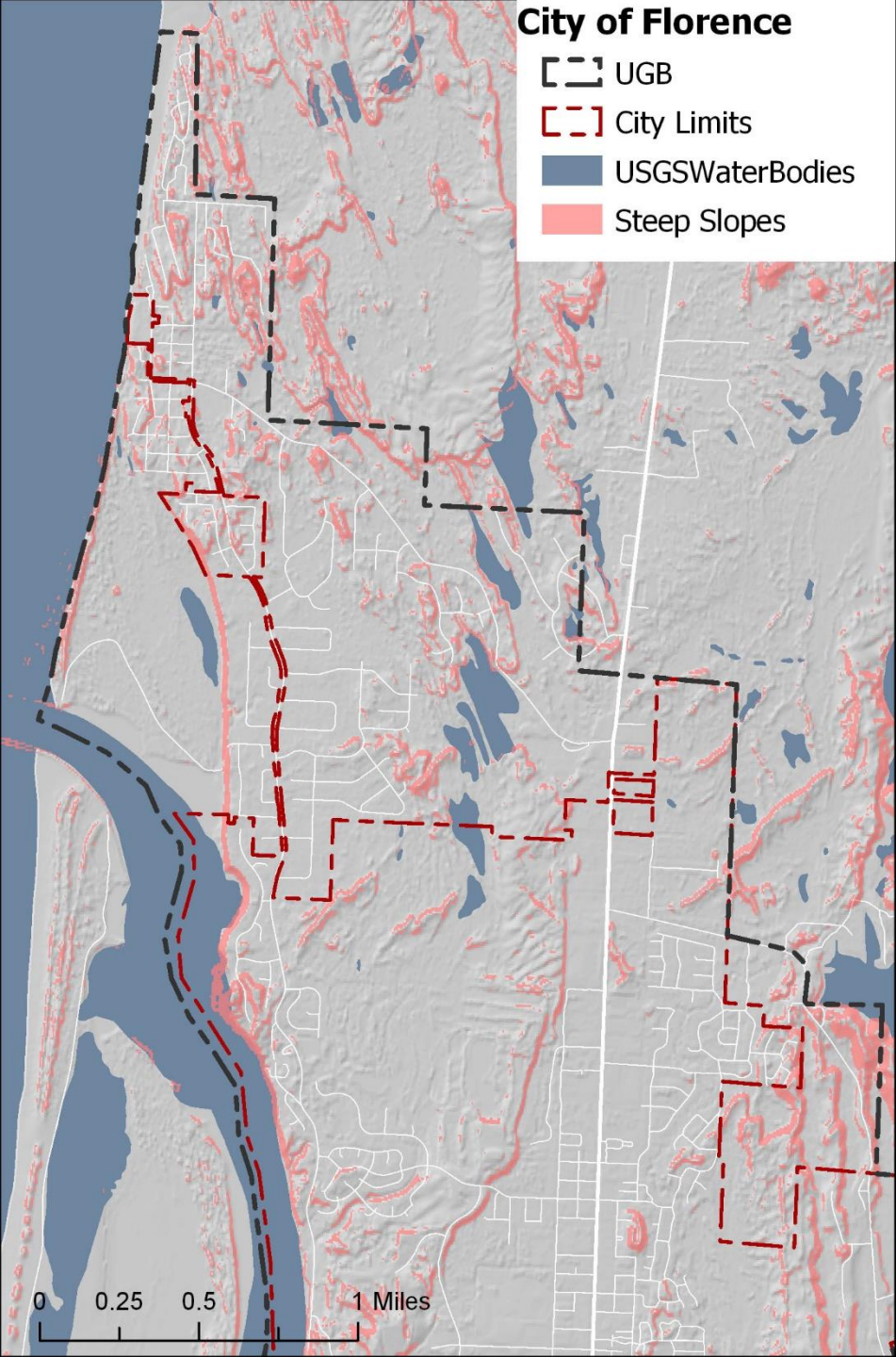


Other Wetlands

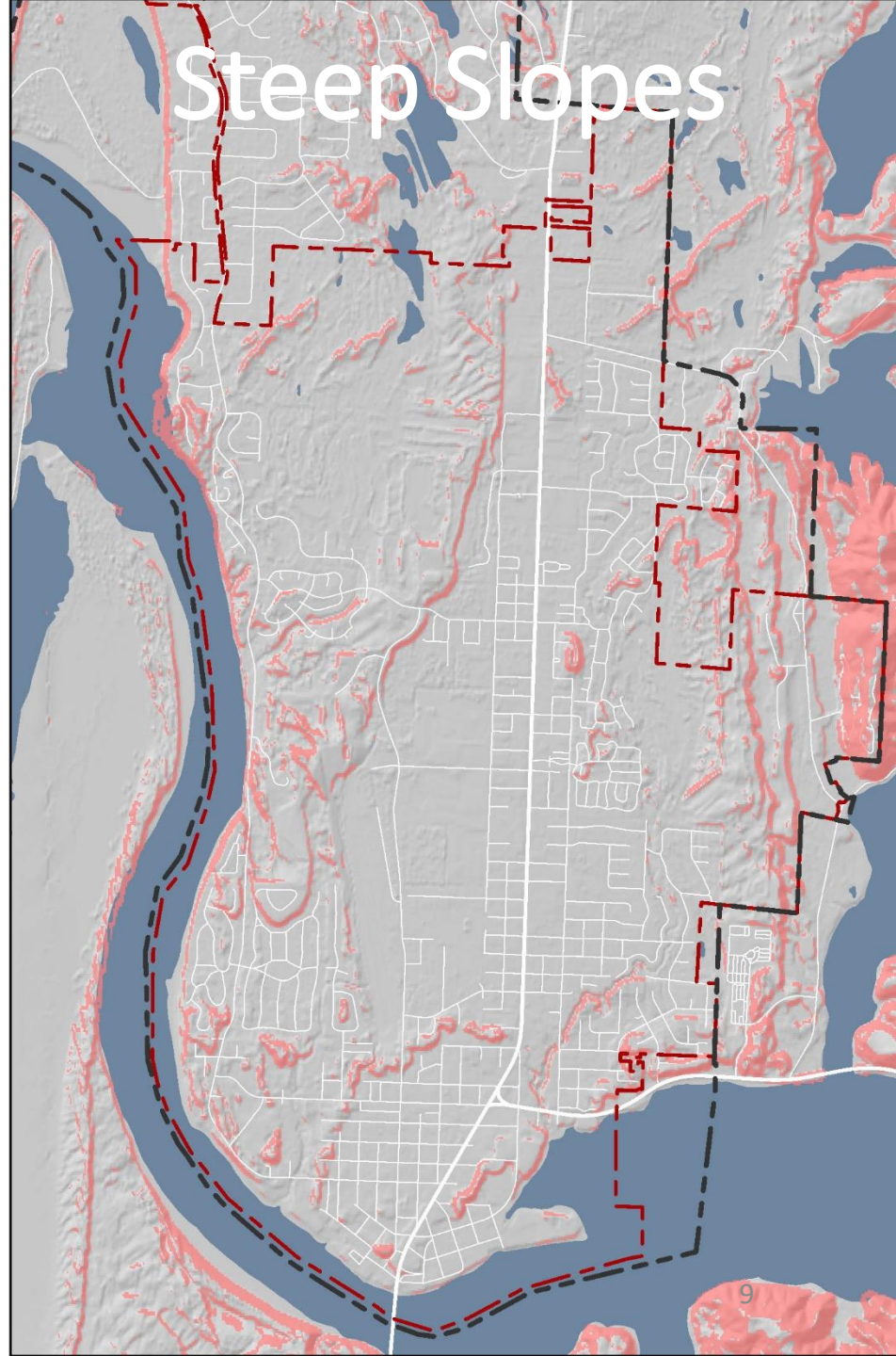


City of Florence

- UGB
- City Limits
- USGSWaterBodies
- Steep Slopes

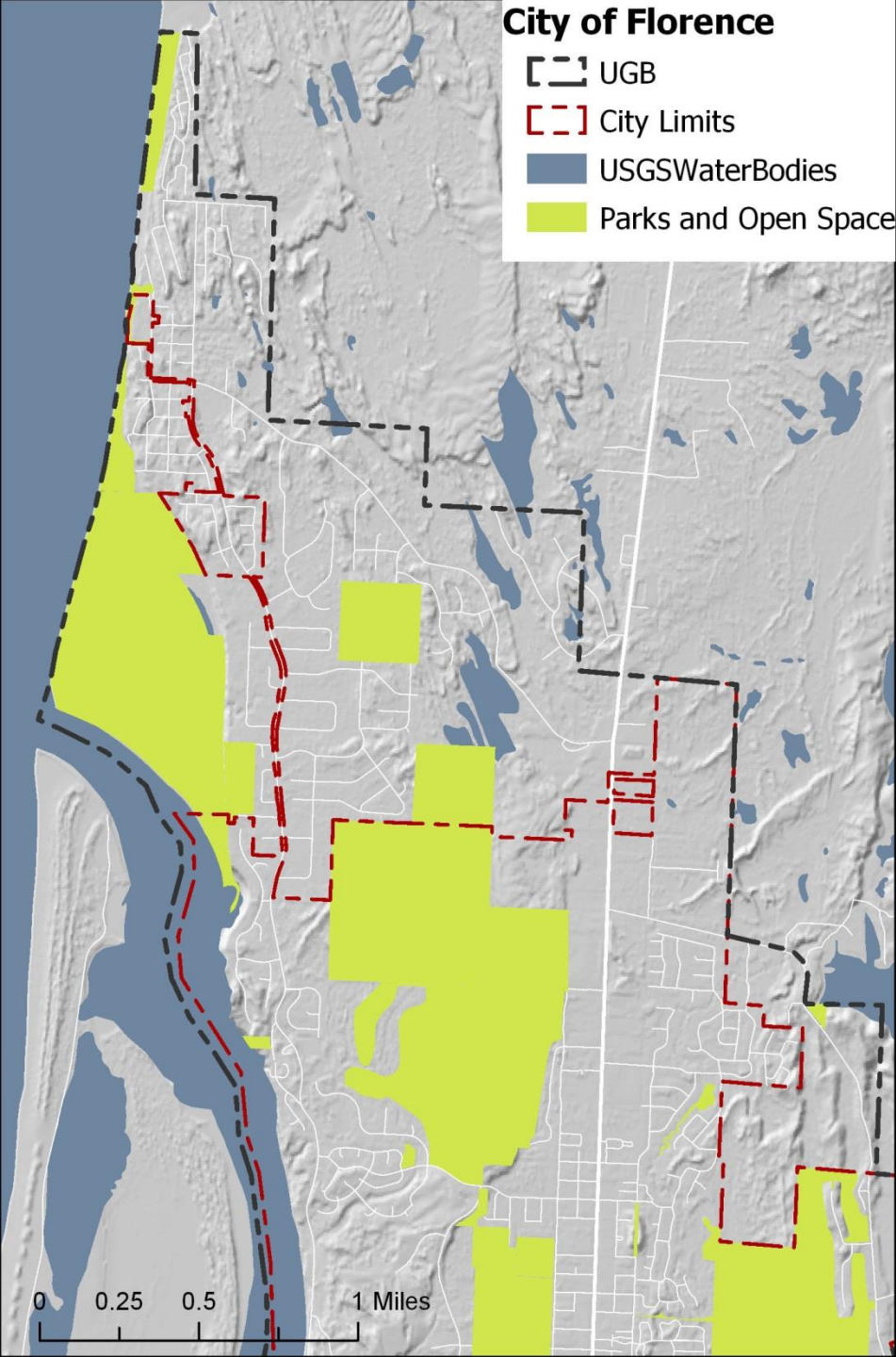


Steep Slopes

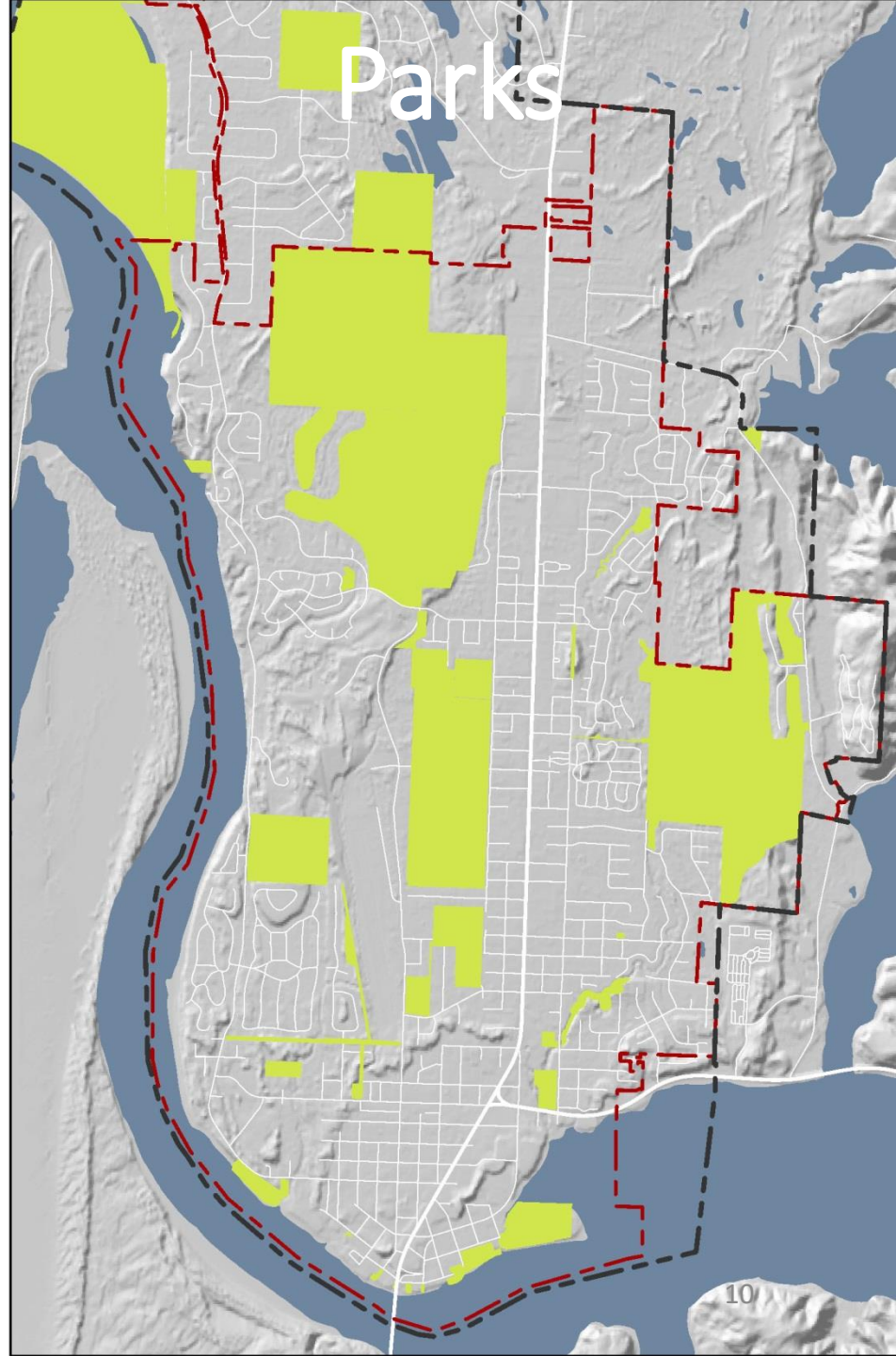


City of Florence

- UGB
- City Limits
- USGS Water Bodies
- Parks and Open Space

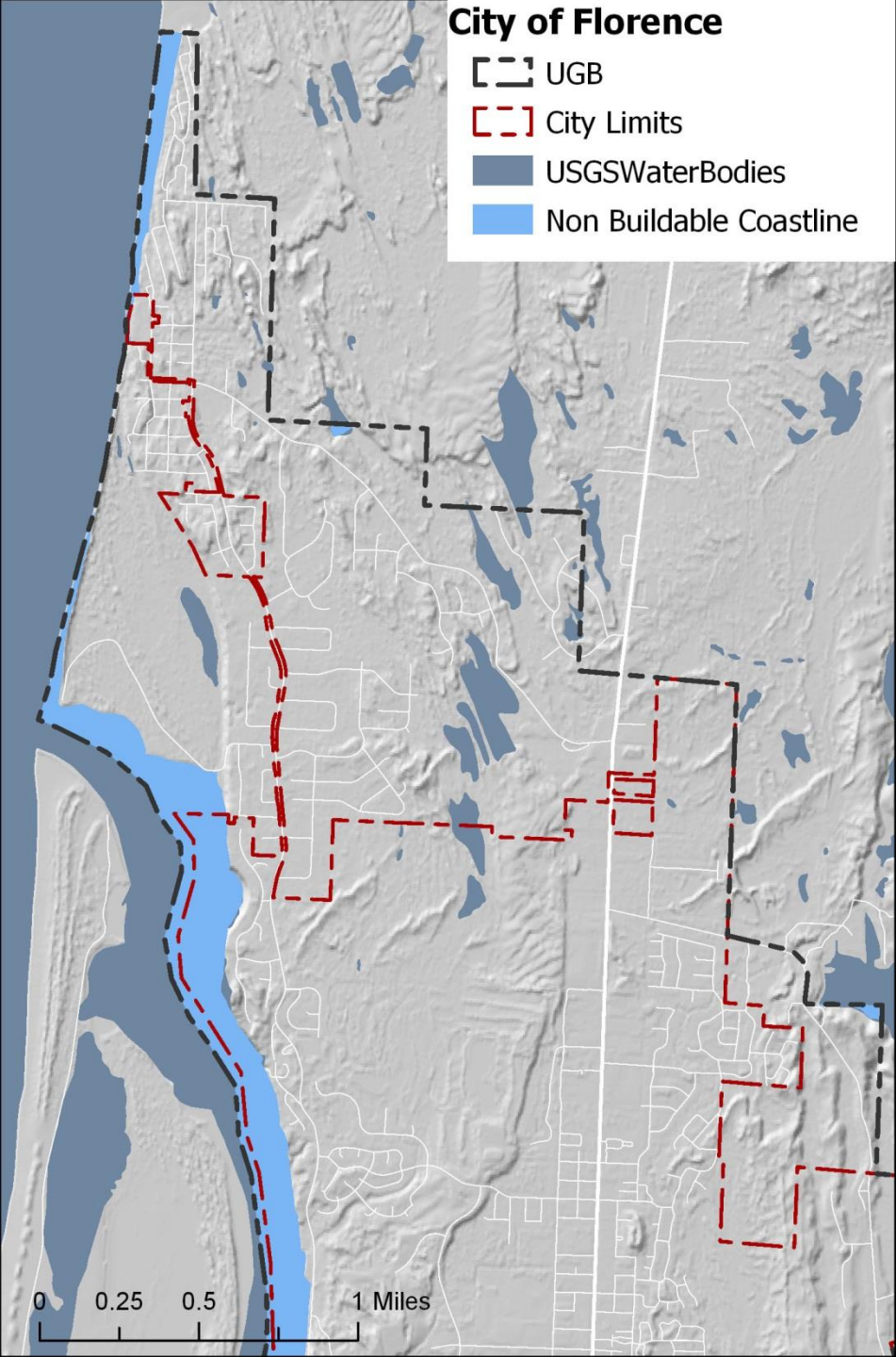


Parks

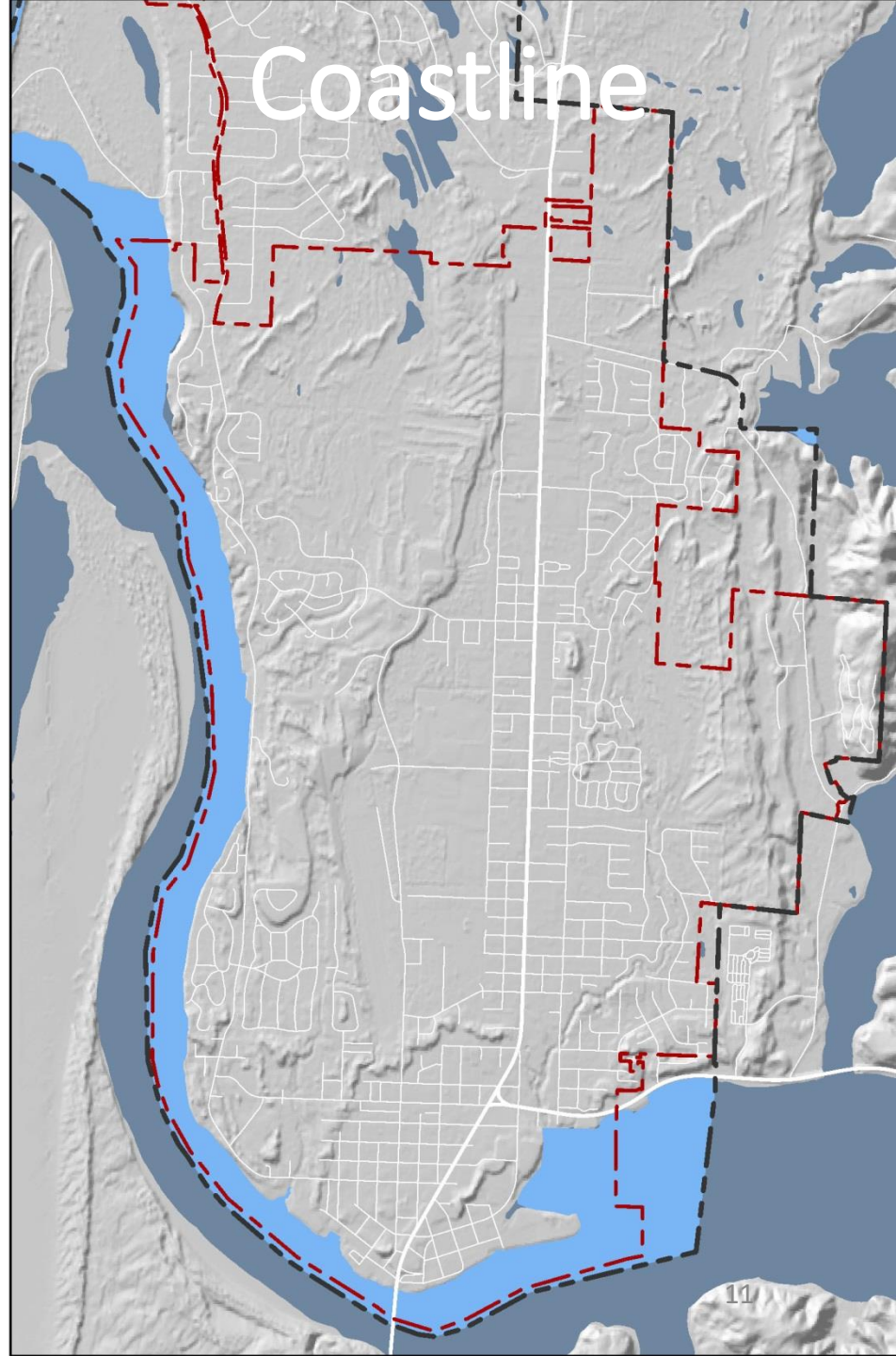


City of Florence

- UGB
- City Limits
- USGSWaterBodies
- Non Buildable Coastline

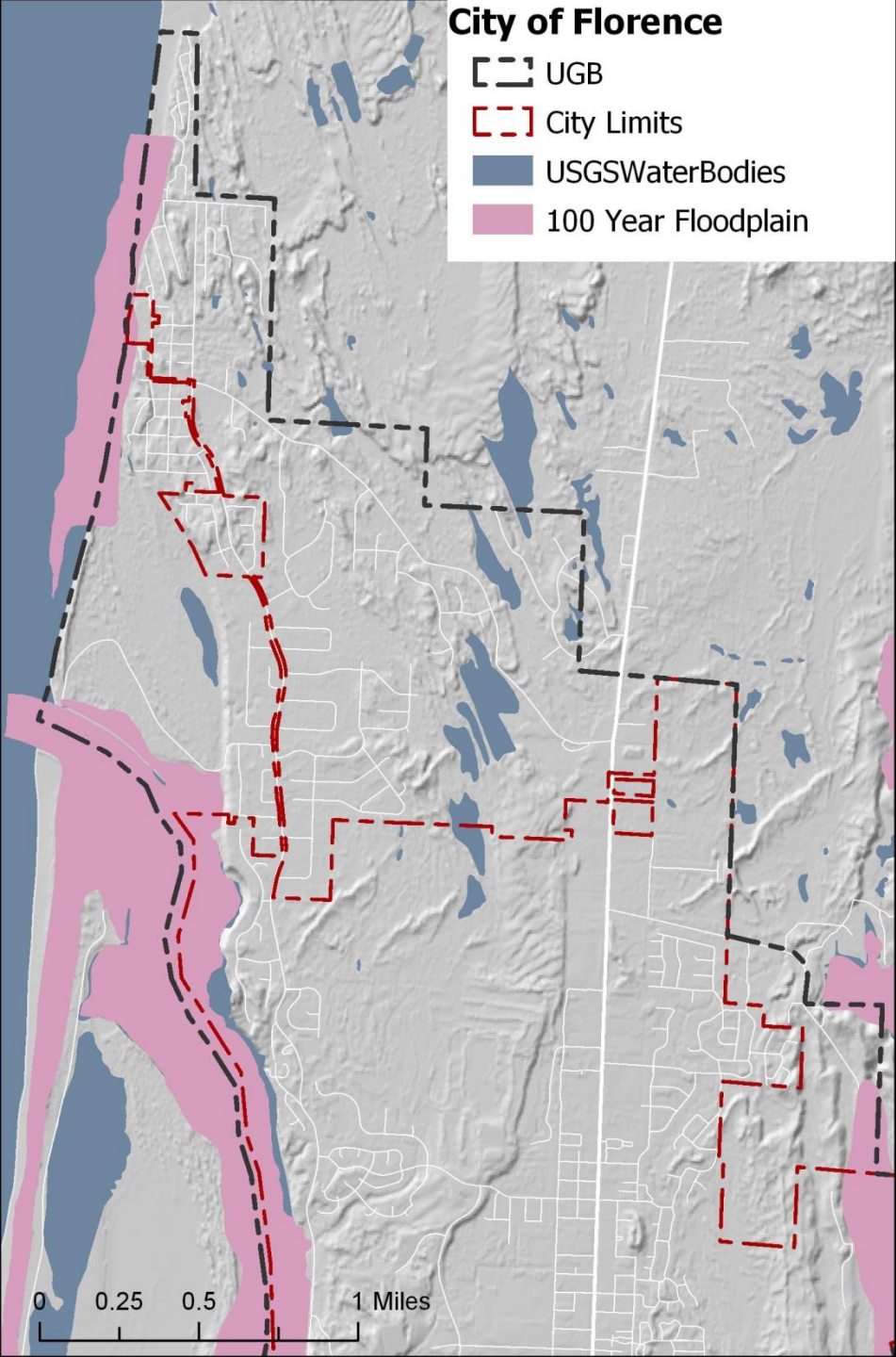


Coastline

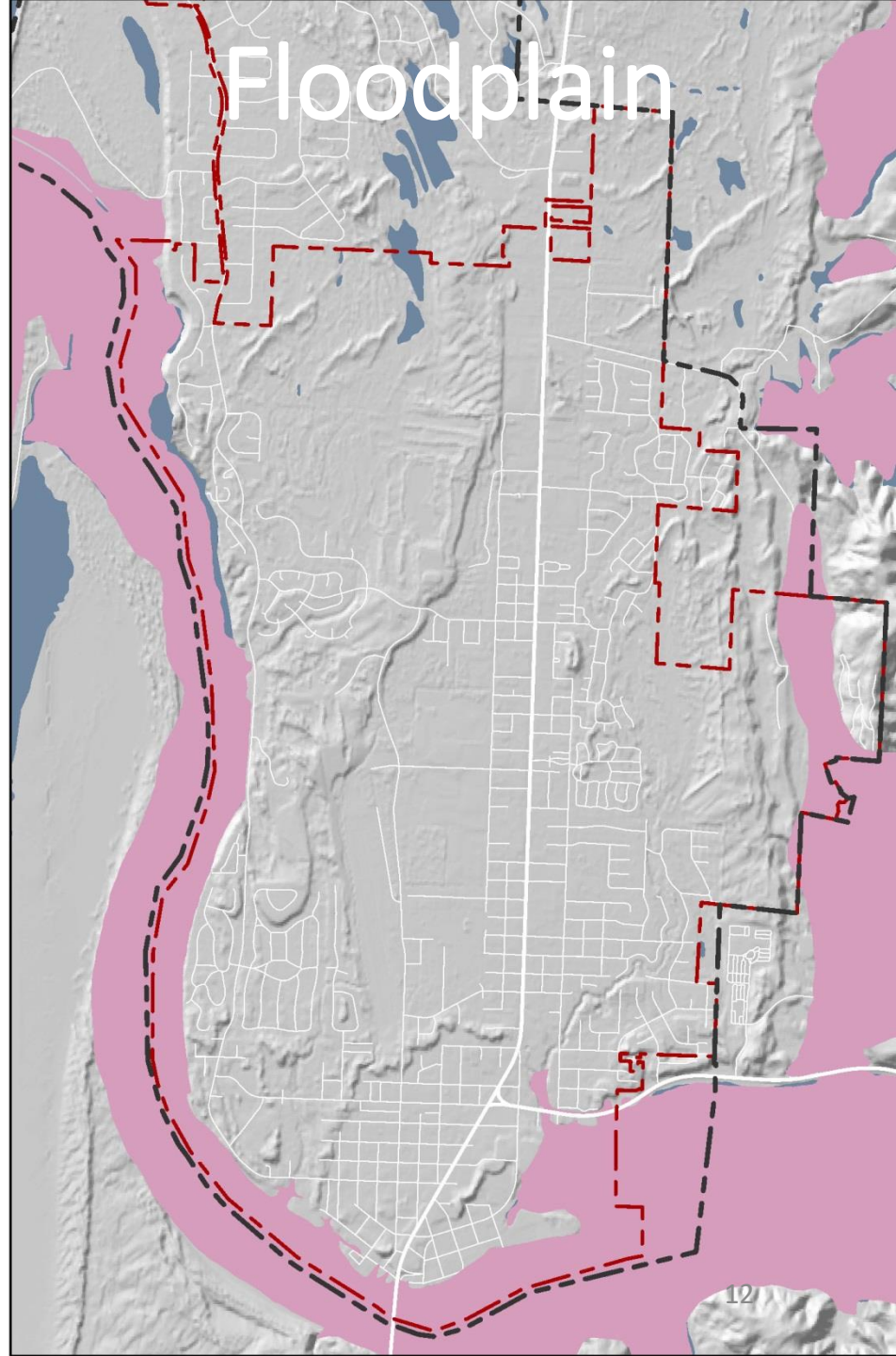


City of Florence

- UGB
- City Limits
- USGSWaterBodies
- 100 Year Floodplain

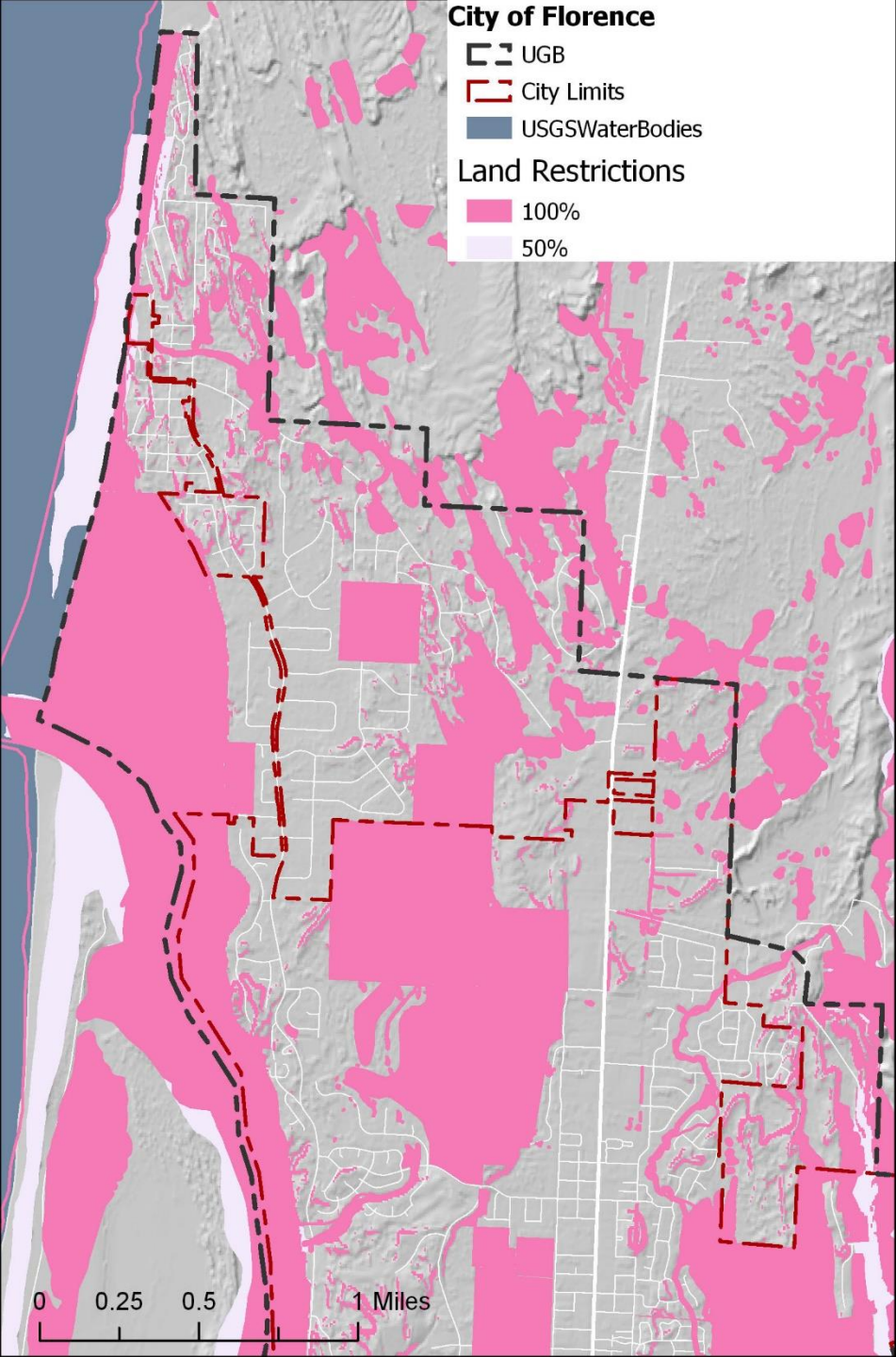


Floodplain

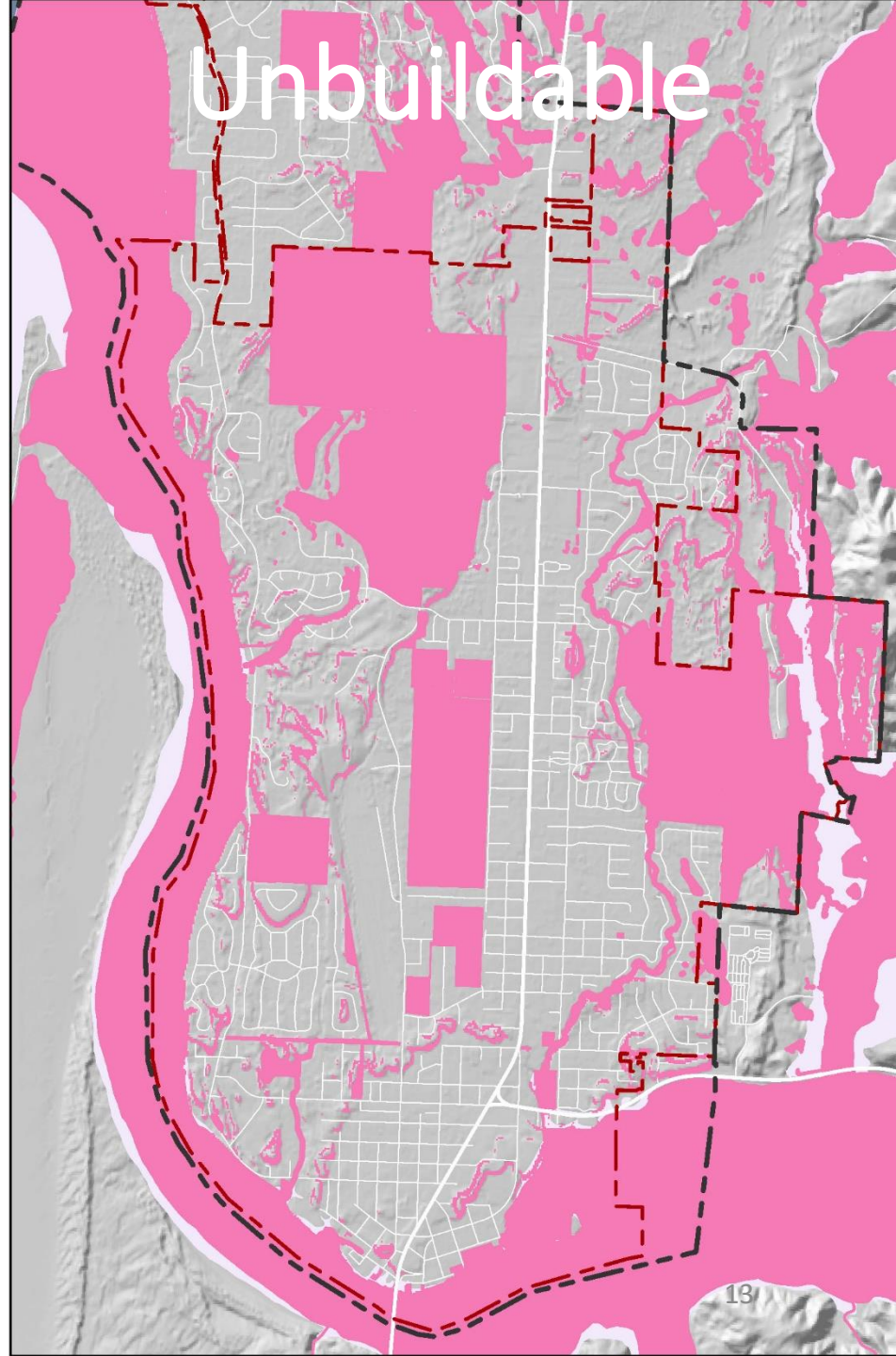


City of Florence

- UGB
- City Limits
- USGSWaterBodies
- Land Restrictions**
 - 100%
 - 50%



Unbuildable



Buildable Land – Multiple Categories

- Vacant – Tax lots that are classified by the Lane County Assessor as being “vacant”
- Developed – Tax Lots that are not classified as “vacant” and cannot be subdivided under current zoning
- Partially vacant – Developed Tax lots that could be subdivided under current zoning
 - Partially Vacant Res – residential zoned lots
 - Partially Vacant EMP – commercial/industrial zoned lots
- Public – Land under public ownership
- Semi-Public – land under non-profit ownership
- Undevelopable – tax lot cannot be developed under current zoning or is more than 90% constrained by environmental factors

Buildable Land

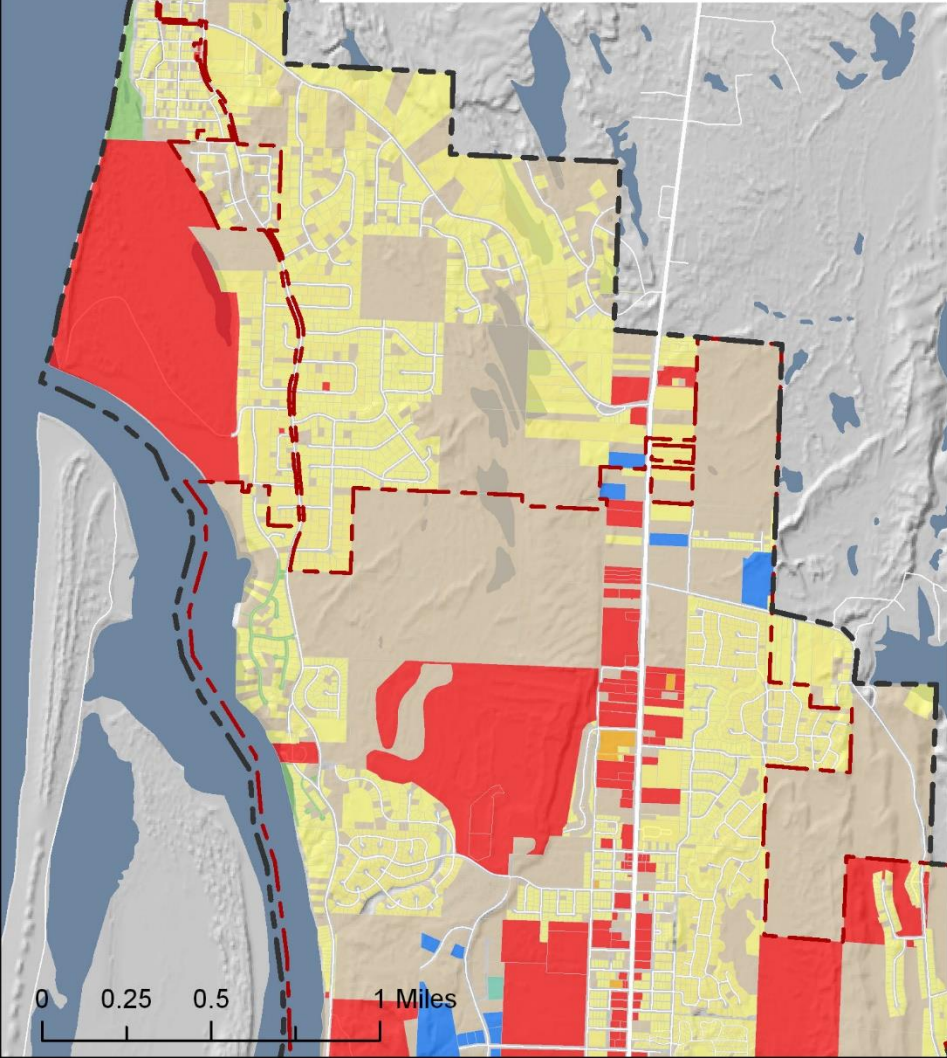
Available Data Sets:

- Tax lots
 - Assessed values
 - Limited existing land use

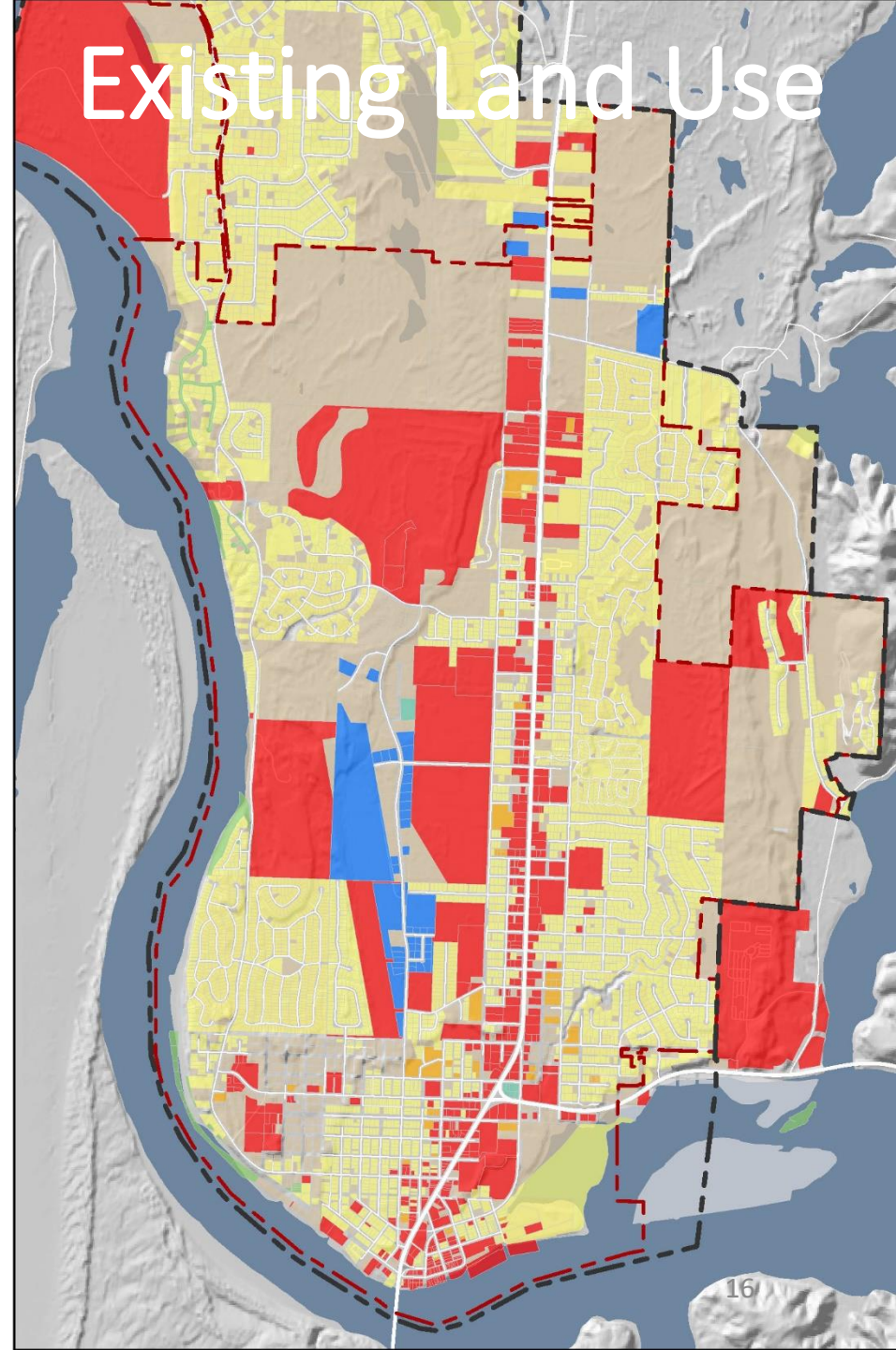
⇒ BLI Partial vacant category will be less precise
- Zoning
 - City
 - County
 - Overlay
- Public land
 - Public land that will be developed needs to be determined

City of Florence

- UGB
- City Limits
- USGS Water Bodies
- Tax lot
- Existing Land Use
 - Commercial
 - Industrial
 - Multi-Family
 - Residential
 - Manufactured Home
 - Utility
 - Open Space
 - Vacant
 - Unknown



Existing Land Use

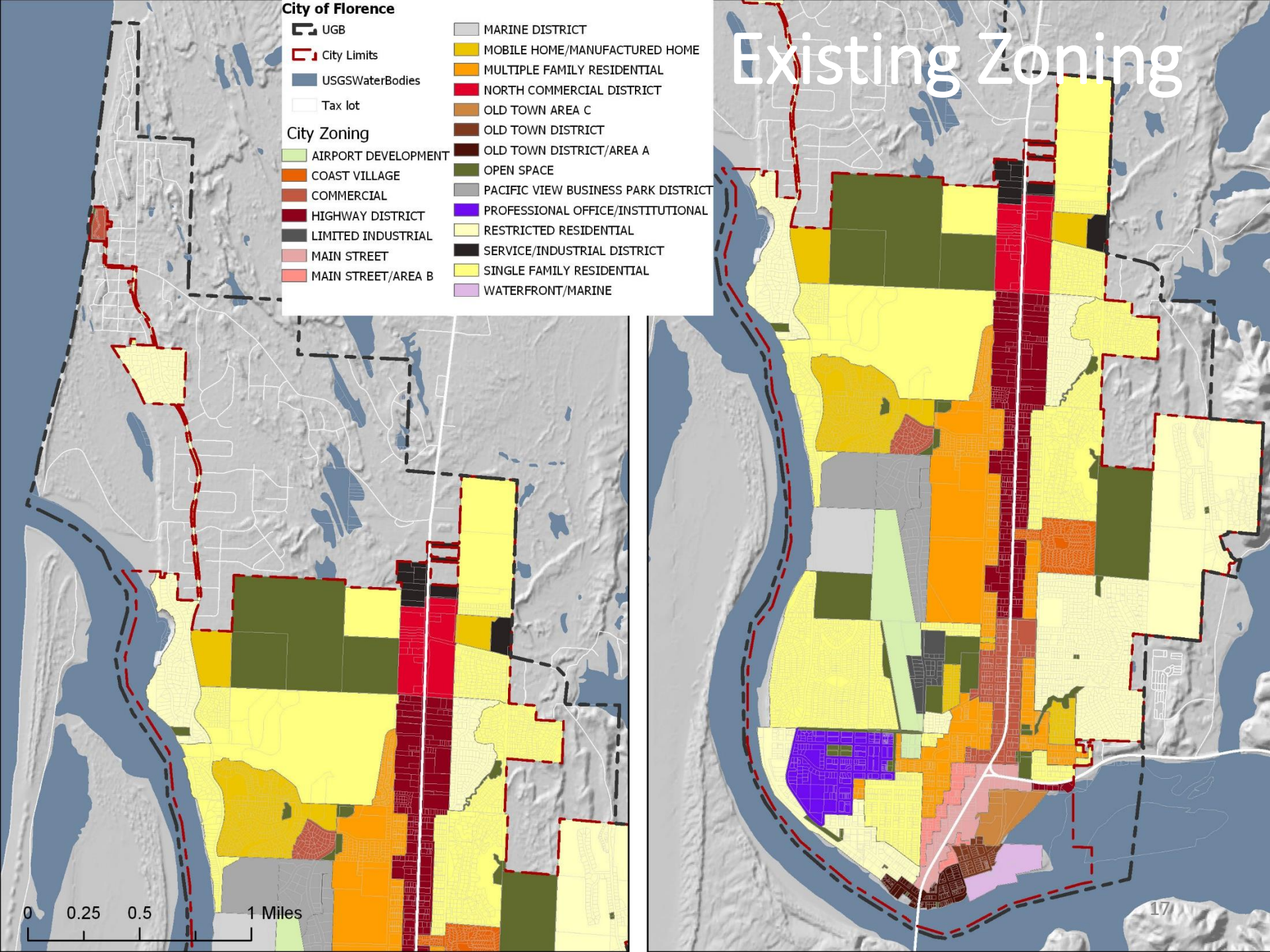


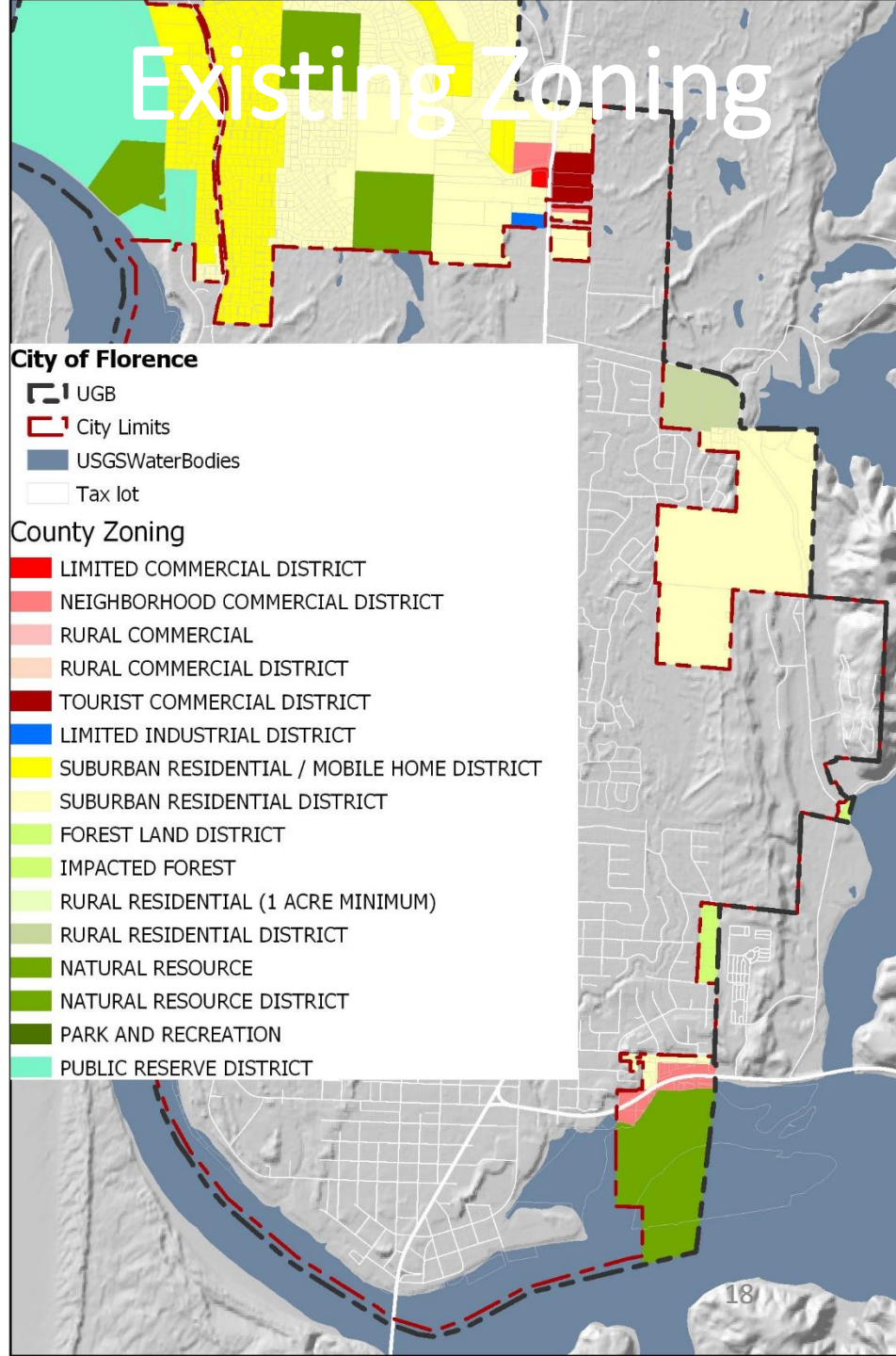
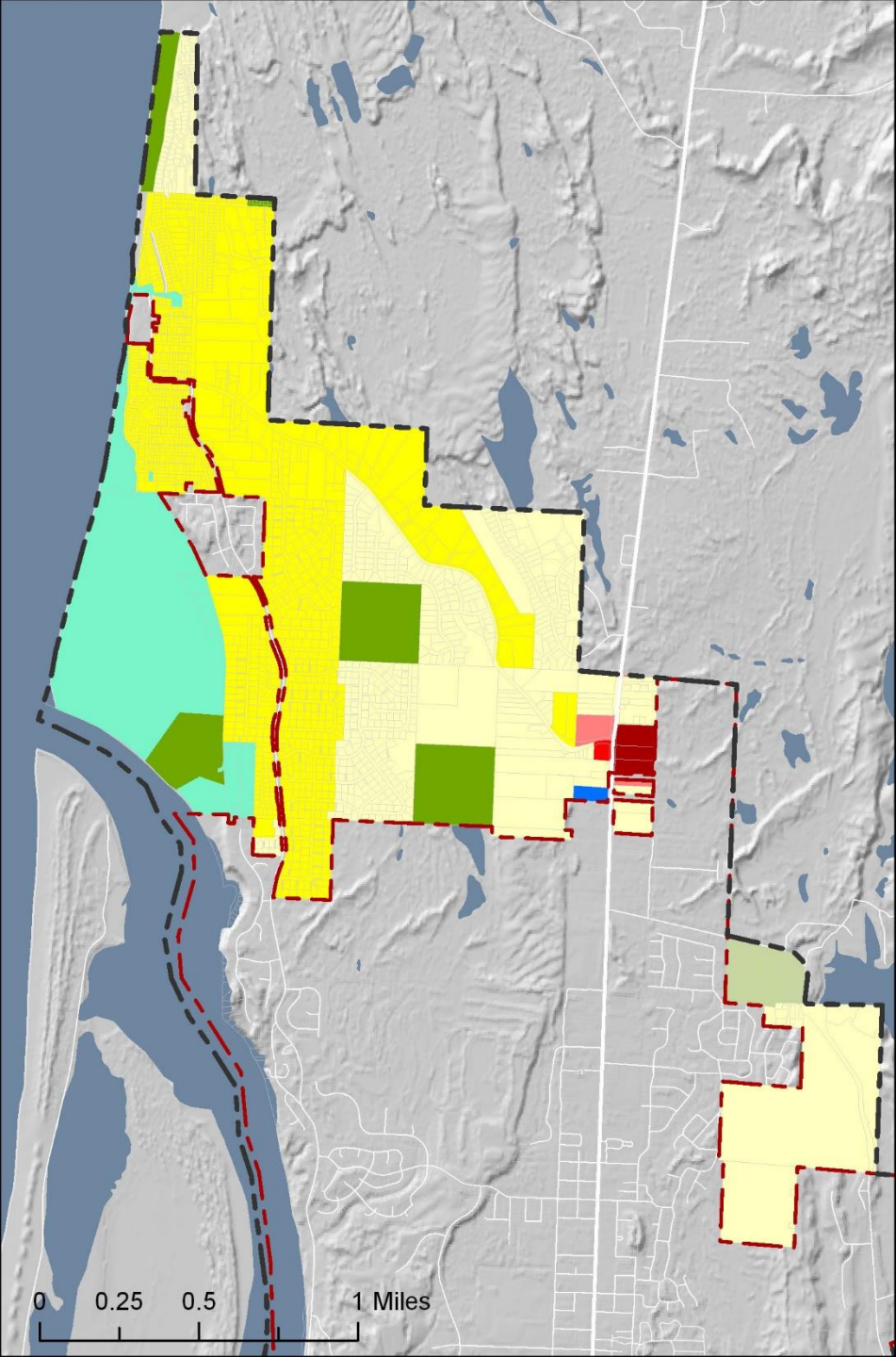
City of Florence

- UGB
- City Limits
- USGS Water Bodies
- Tax lot
- City Zoning**
- AIRPORT DEVELOPMENT
- COAST VILLAGE
- COMMERCIAL
- HIGHWAY DISTRICT
- LIMITED INDUSTRIAL
- MAIN STREET
- MAIN STREET/AREA B
- MARINE DISTRICT
- MOBILE HOME/MANUFACTURED HOME
- MULTIPLE FAMILY RESIDENTIAL
- NORTH COMMERCIAL DISTRICT
- OLD TOWN AREA C
- OLD TOWN DISTRICT
- OLD TOWN DISTRICT/AREA A
- OPEN SPACE
- PACIFIC VIEW BUSINESS PARK DISTRICT
- PROFESSIONAL OFFICE/INSTITUTIONAL
- RESTRICTED RESIDENTIAL
- SERVICE/INDUSTRIAL DISTRICT
- SINGLE FAMILY RESIDENTIAL
- WATERFRONT/MARINE

Existing Zoning

0 0.25 0.5 1 Miles





Buildable Land – 1 Step

- **Vacant** – Lots identified as vacant in property class
- **Unbuildable** - Lots identified as unbuildable in property class
- **Developed** – all others

City of Florence

UGB

City Limits

USGS Water Bodies

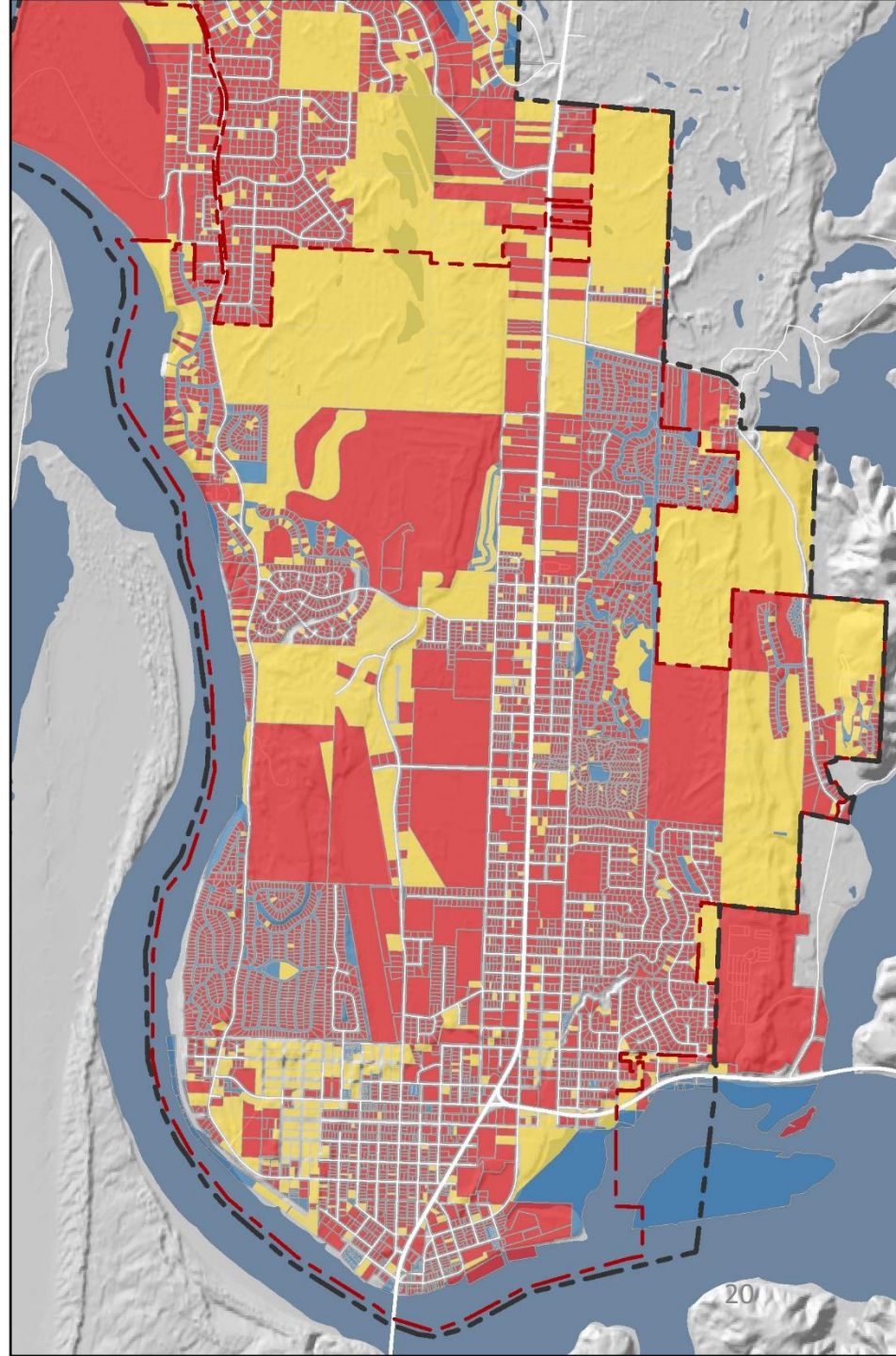
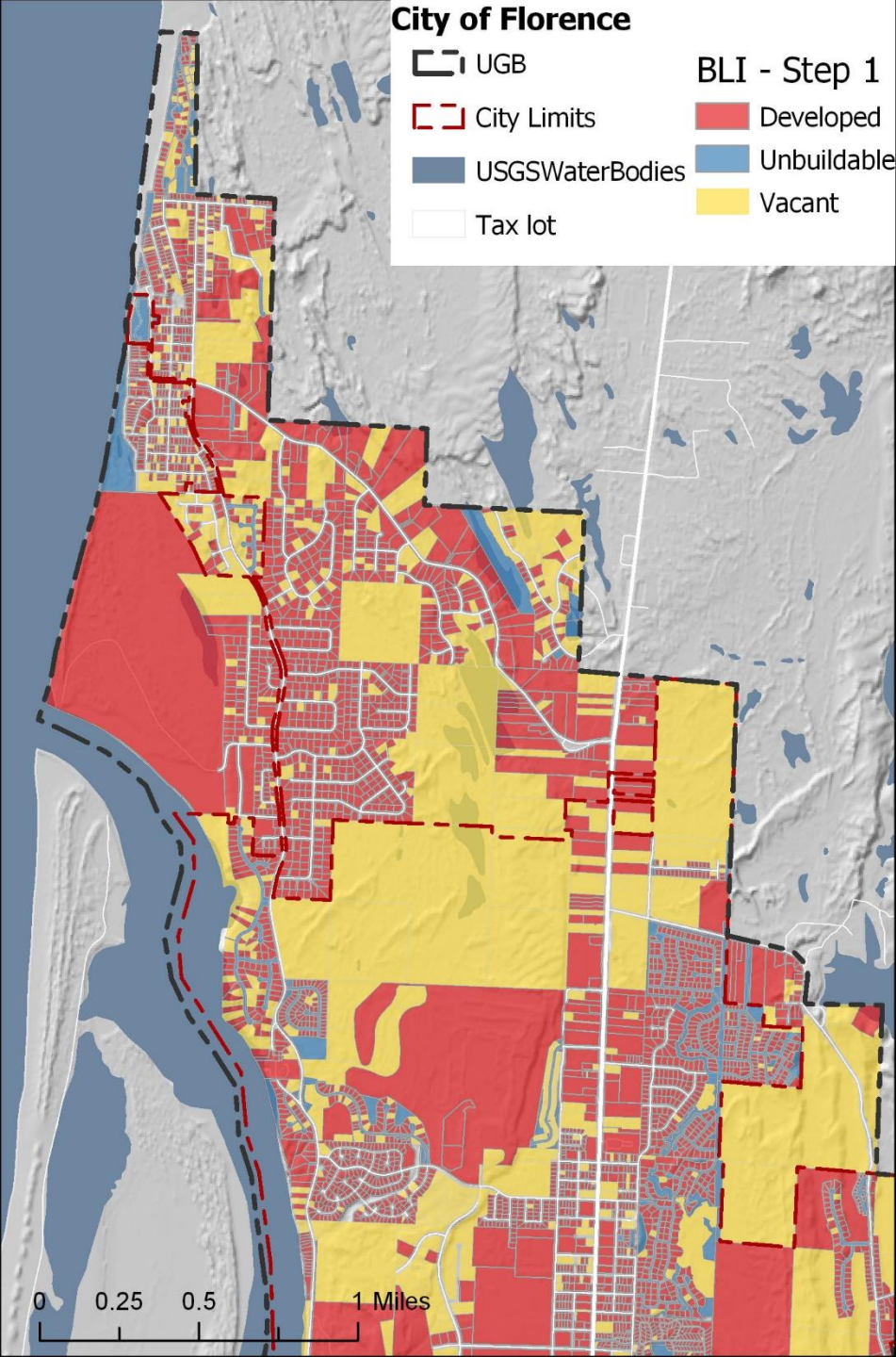
Tax lot

BLI - Step 1

Developed

Unbuildable

Vacant



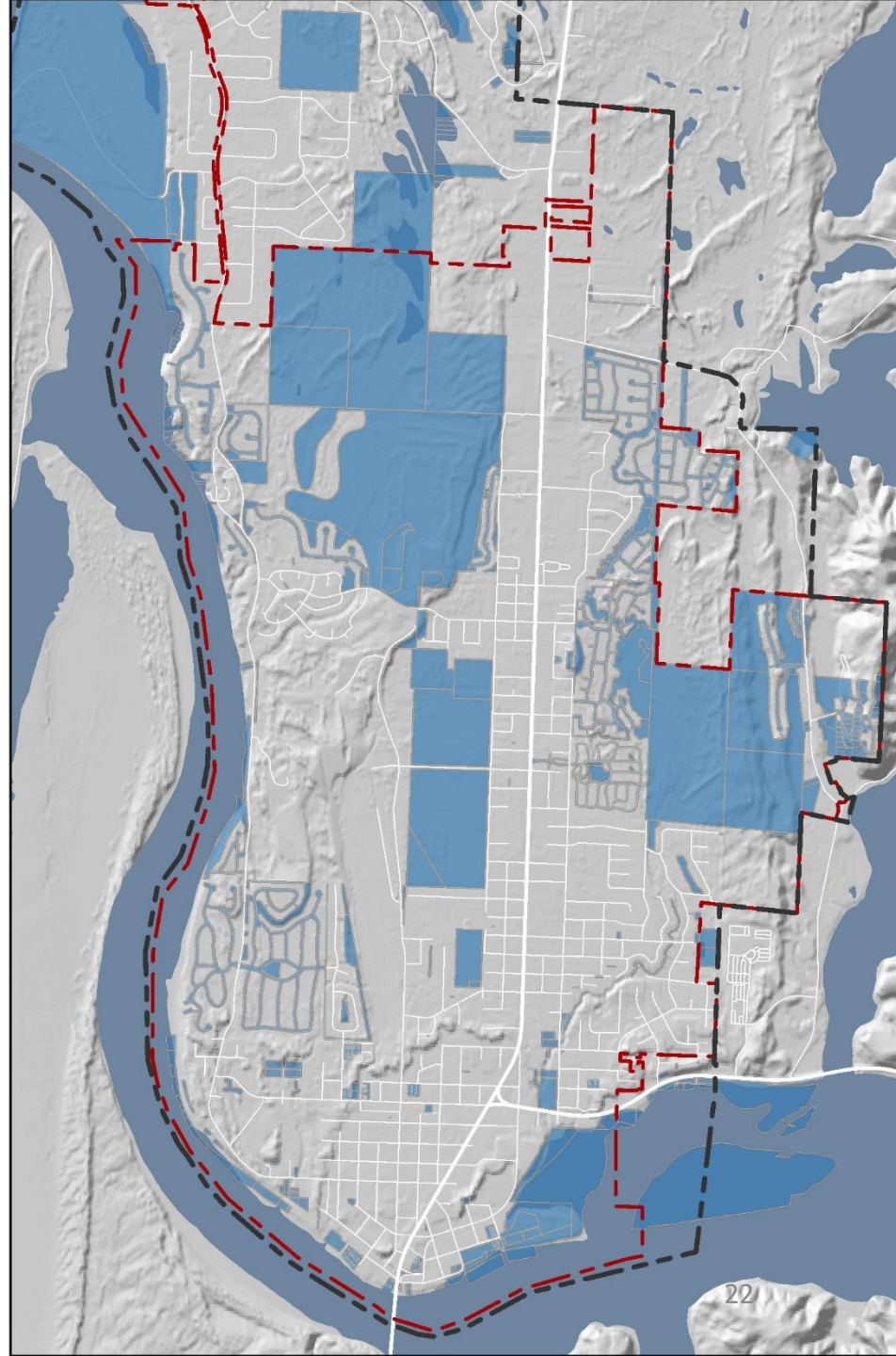
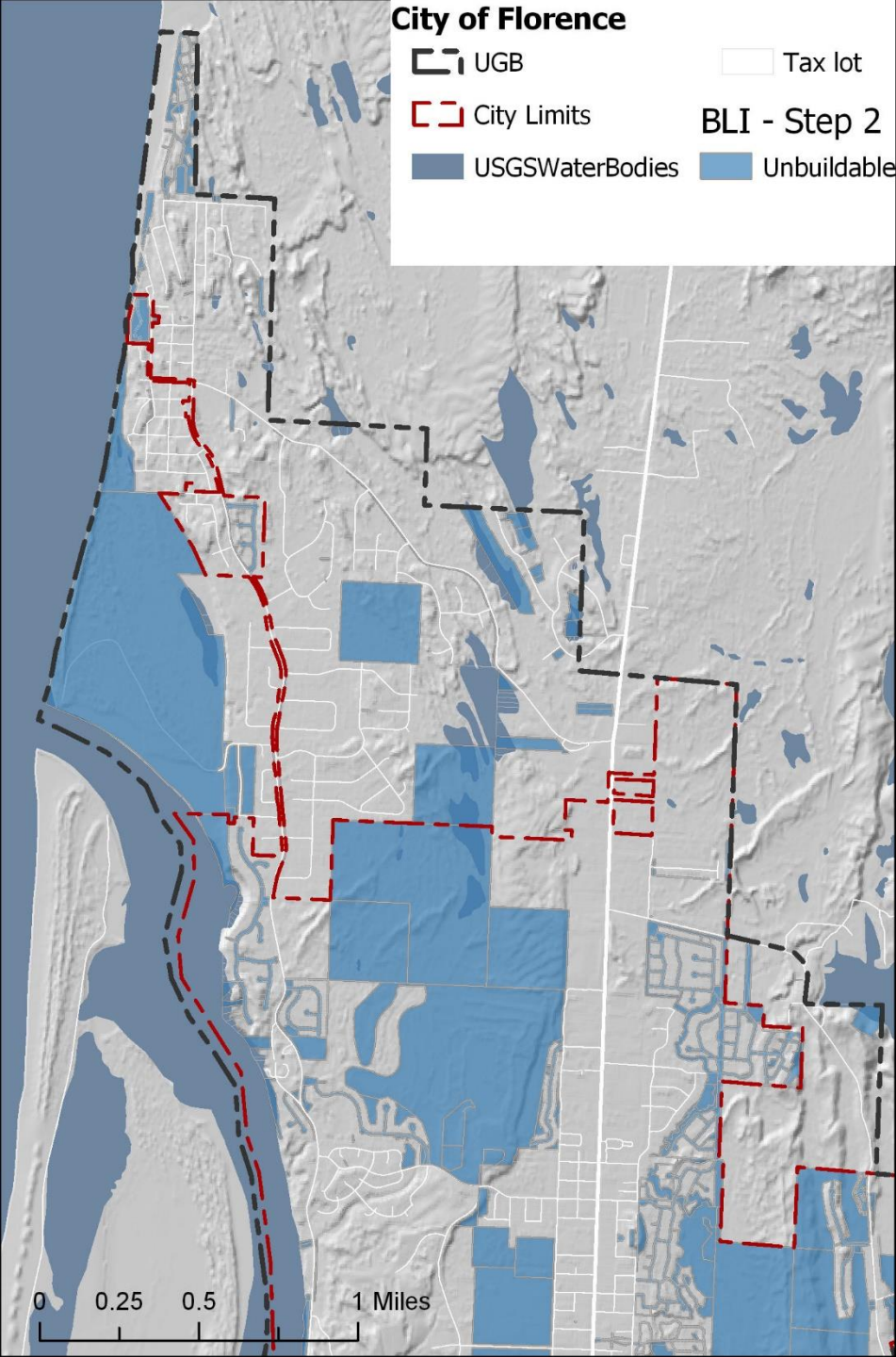
Buildable Land – 2nd Step

- What is buildable? How much of the tax lot is constrained? How much of the lot is buildable?
- Taxlot that are over 90% constrained
⇒ **Unbuildable***

* Applied to Vacant as well as Developed lots. Checked parcels larger than 1 acre for developed. The selected parcels have a restrictive zoning type for additional development.

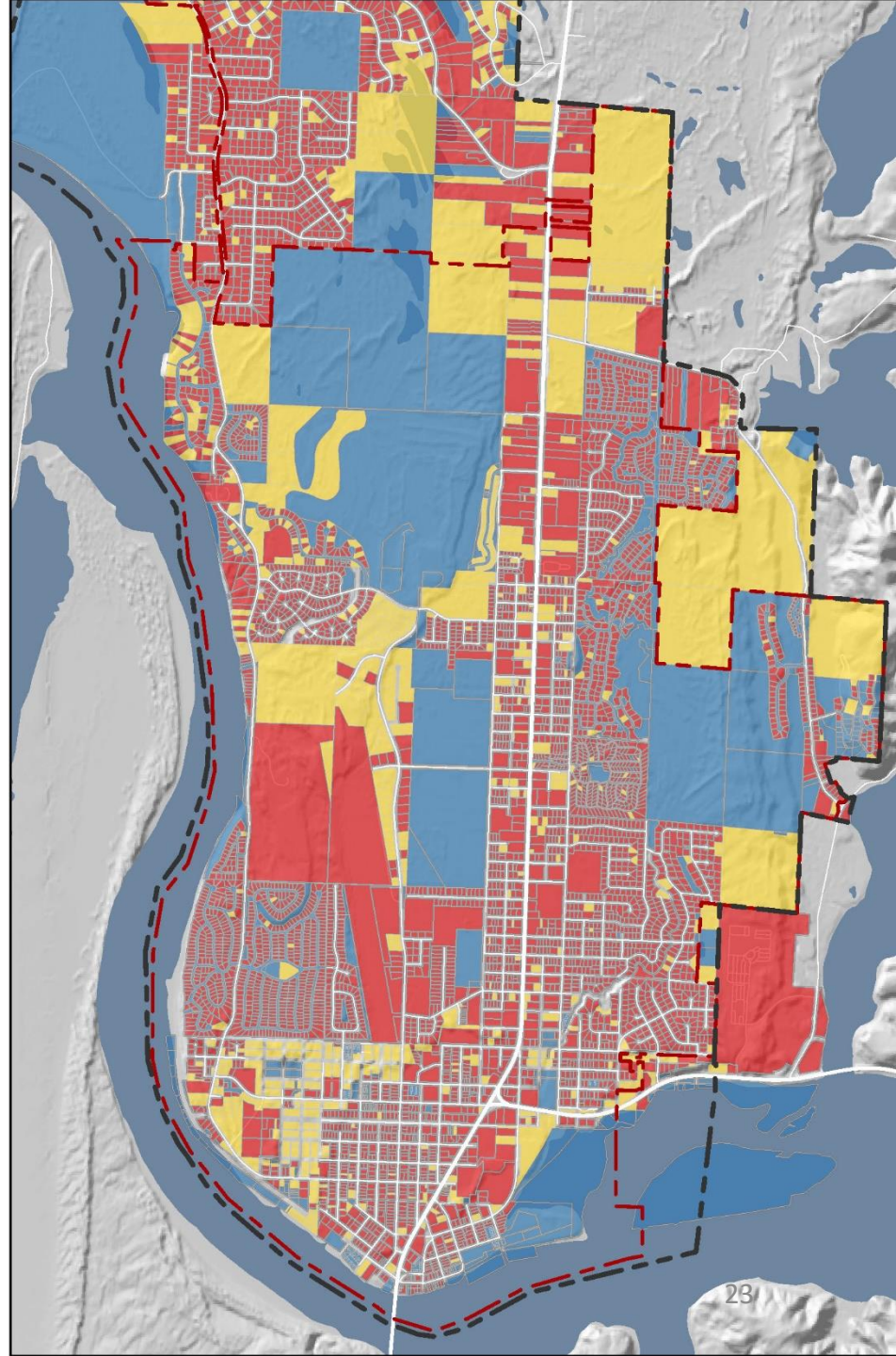
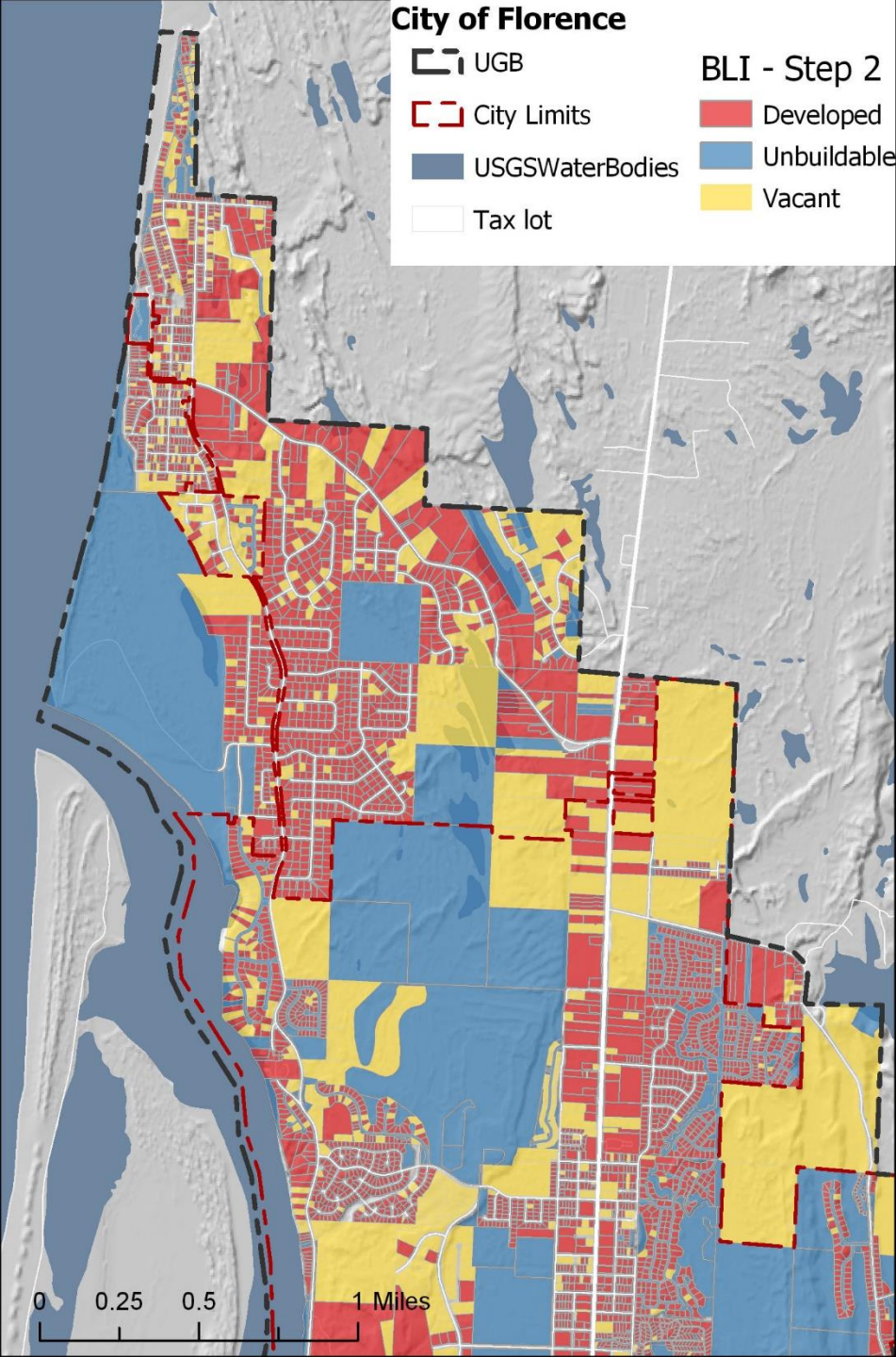
City of Florence

- UGB
- City Limits
- USGSWaterBodies
- Tax lot
- BLI - Step 2
- Unbuildable



City of Florence

- UGB
- City Limits
- USGS Water Bodies
- Tax lot
- BLI - Step 2
 - Developed
 - Unbuildable
 - Vacant



Buildable Land – 3rd Step

- What is publicly/semi-public owned? Which land will the city offer for future development?
 - Check tax lot data for exempt status
 - Cities, port, towns, tribes, public schools, housing authority, and federal government
⇒ **Public**
 - Private organizations
⇒ **Semi-Public**

City of Florence

UGB

City Limits

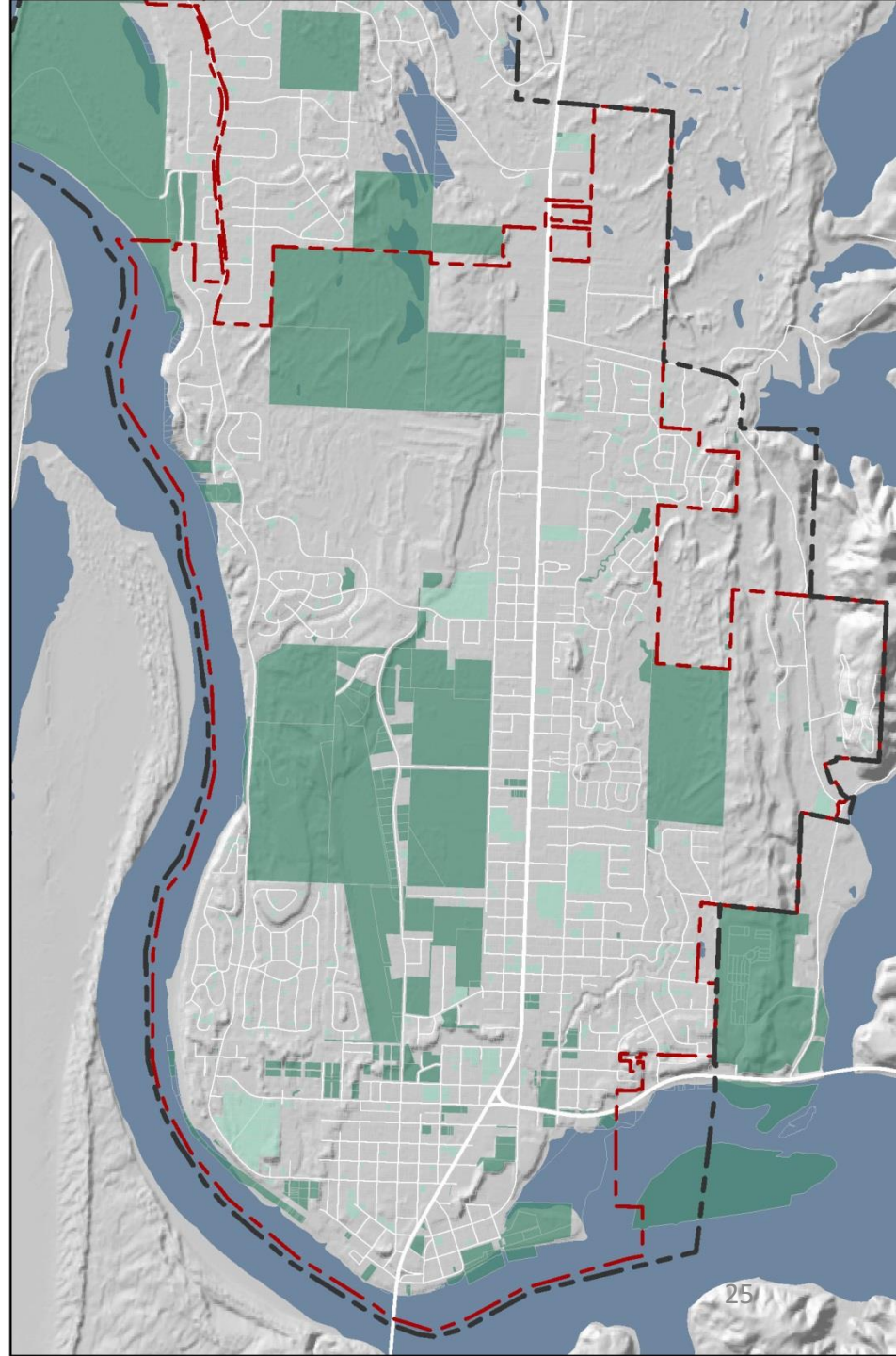
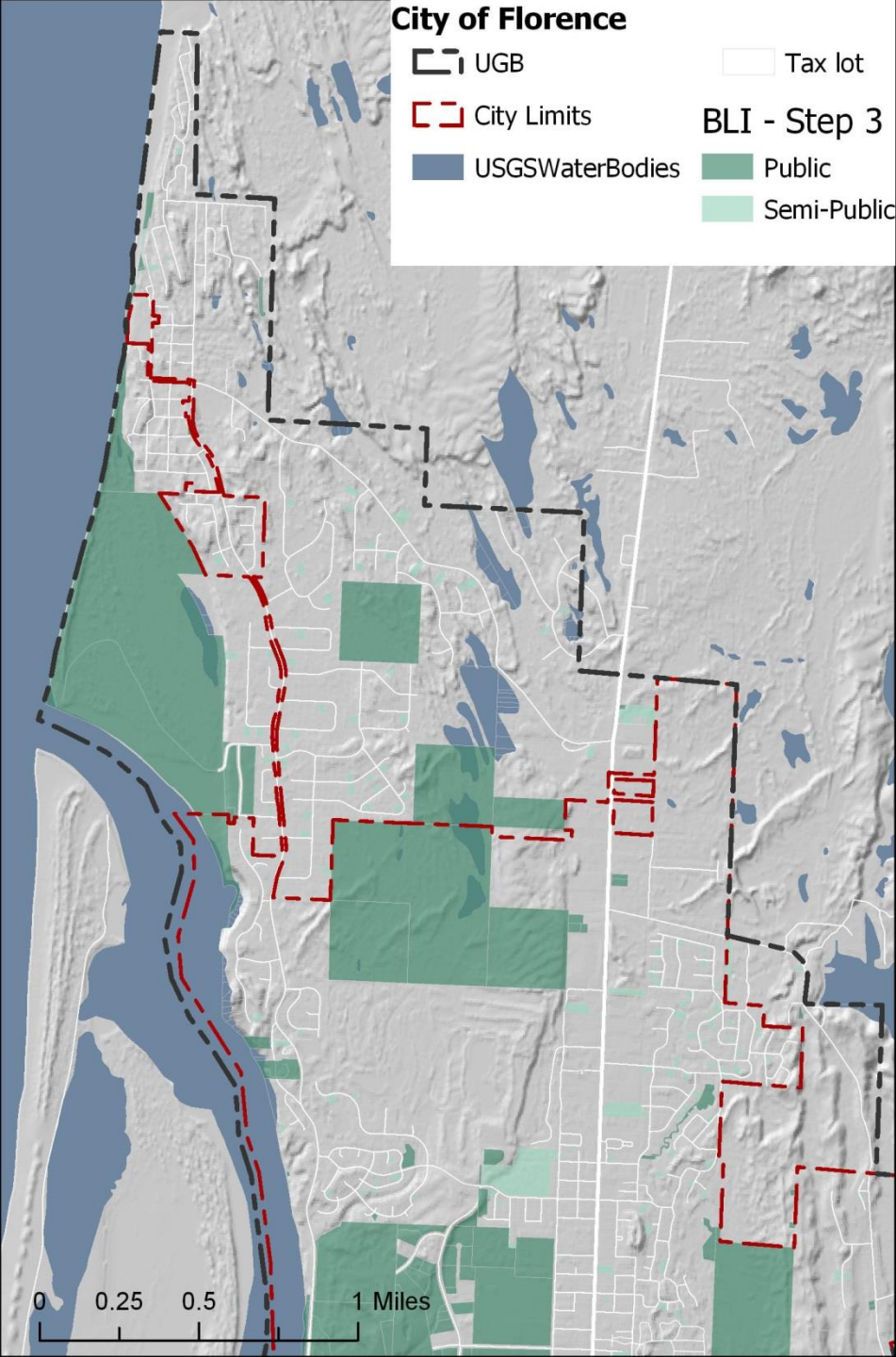
USGS Water Bodies

Tax lot








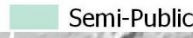
BLI - Step 3

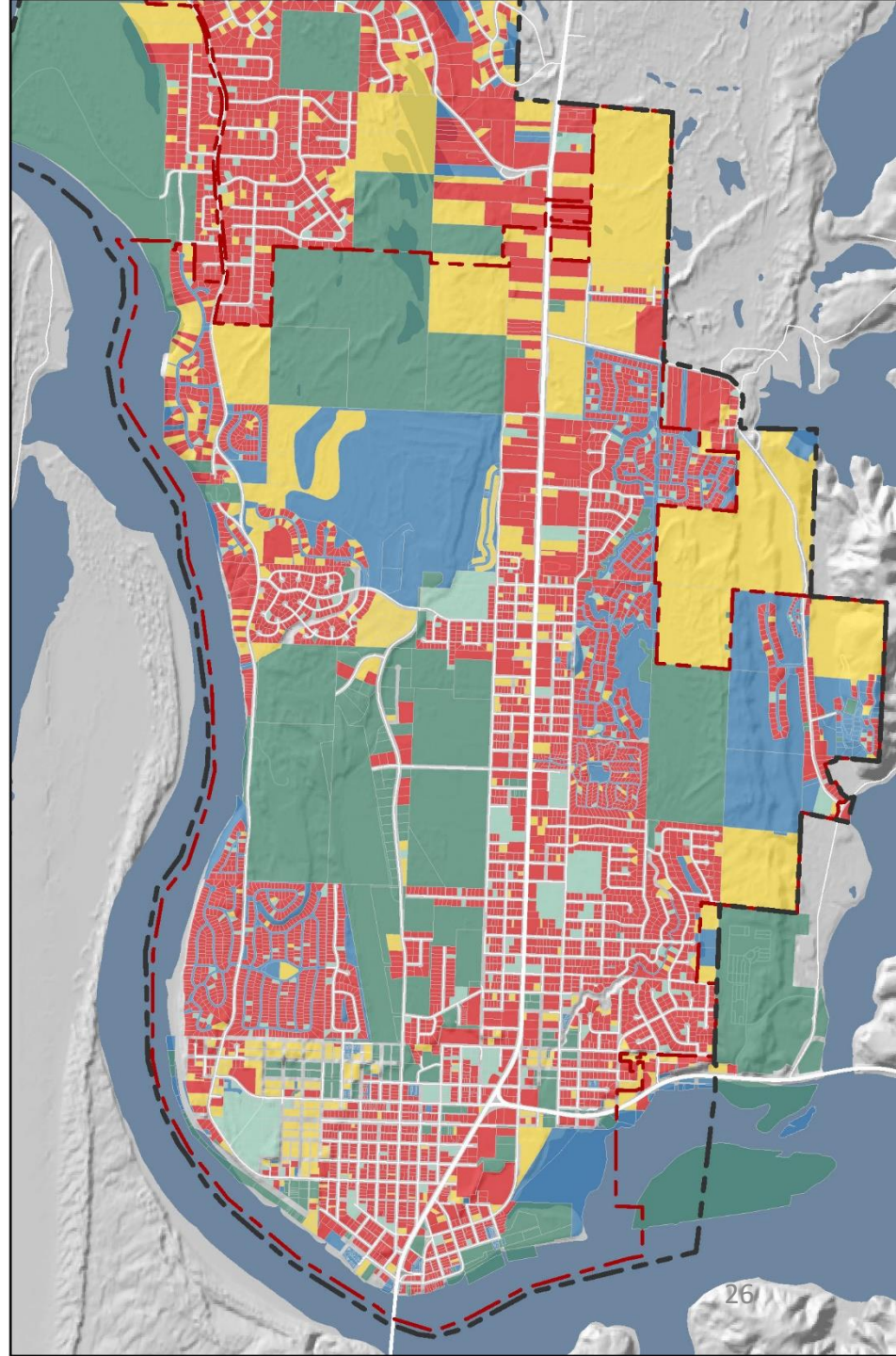
Public

Semi-Public



City of Florence

- | | |
|---|---|
|  UGB | BLI - Step 3 |
|  City Limits |  Developed |
|  USGSWaterBodies |  Unbuildable |
|  Tax lot |  Vacant |
| |  Public |
| |  Semi-Public |



Buildable Land – 4th Step

- A closer look at developed land and zoning
 - Assign 3 categories based on zoning:
 - Residential – RA, RM, RS, etc.
 - Employment – AD, C, MSB, etc.
 - Other – Open Space, Parks, Public, Impacted Forests Lands, etc.
 - Limit to parcel size, zoning type and existing land use, plus aerial check
 - Residential and Employment has additional land available
 - Other – check on Semi-Public and Public land for rest other BLI assumptions take effect
- => **Partially Vacant** - Parcels with enough land to be subdivided without rezoning

Buildable Land – 4th Step

- Residential
 - At least half acre of unconstrained land
 - Keeping a quarter acre for existing dwelling, leftover lot assumed to be vacant minus constraints

=> **Partial Vacant - Res**



Single Family home on large lot

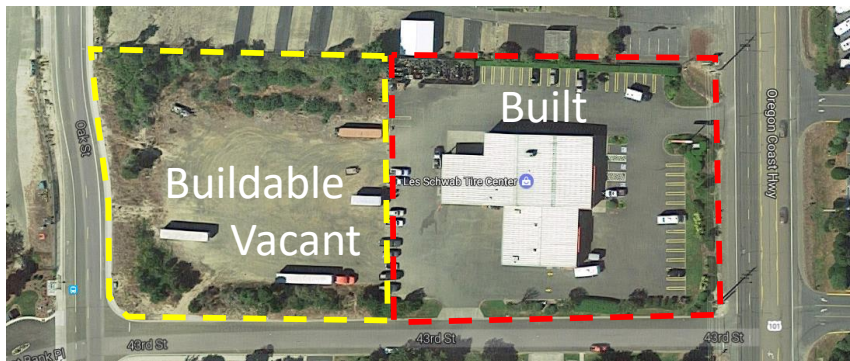


Within an existing manufactured home park

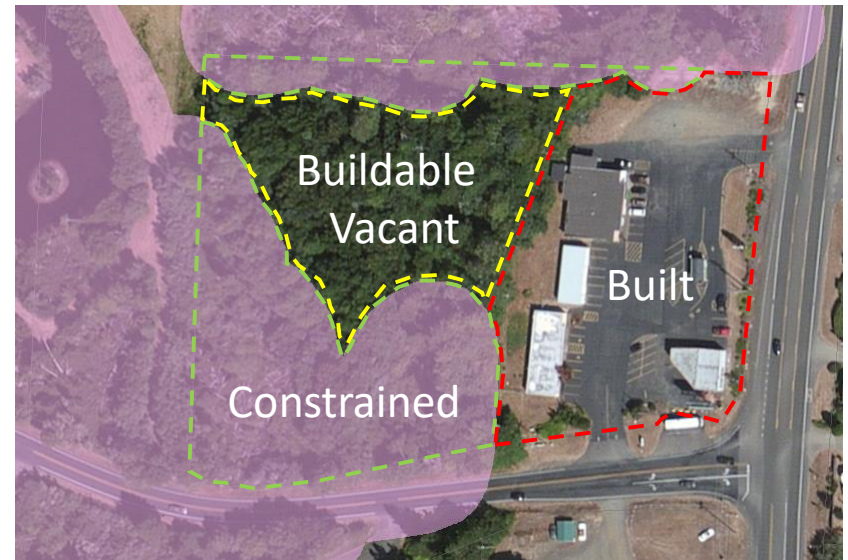
Buildable Land – 4th Step

- Employment
 - At least two acres of unconstrained land
 - Visual check to determine additional buildable land acreage

=> **Partial Vacant - EMP**



Les Schwab – half the lot is undeveloped



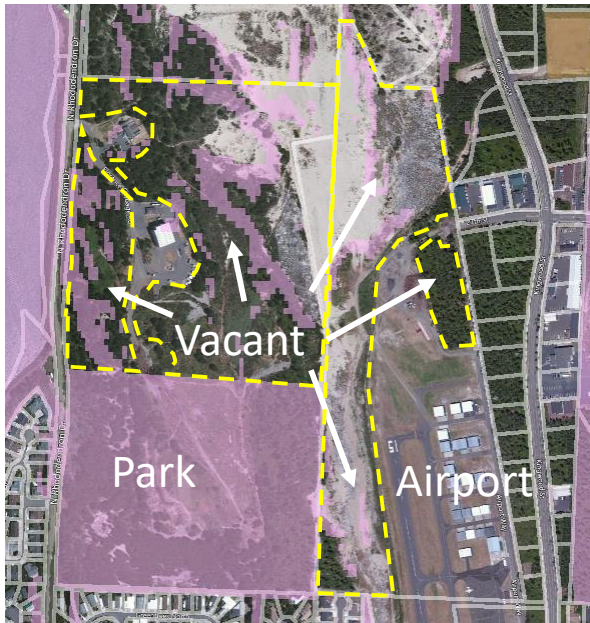
Partially developed lot

Buildable Land – 4th Step

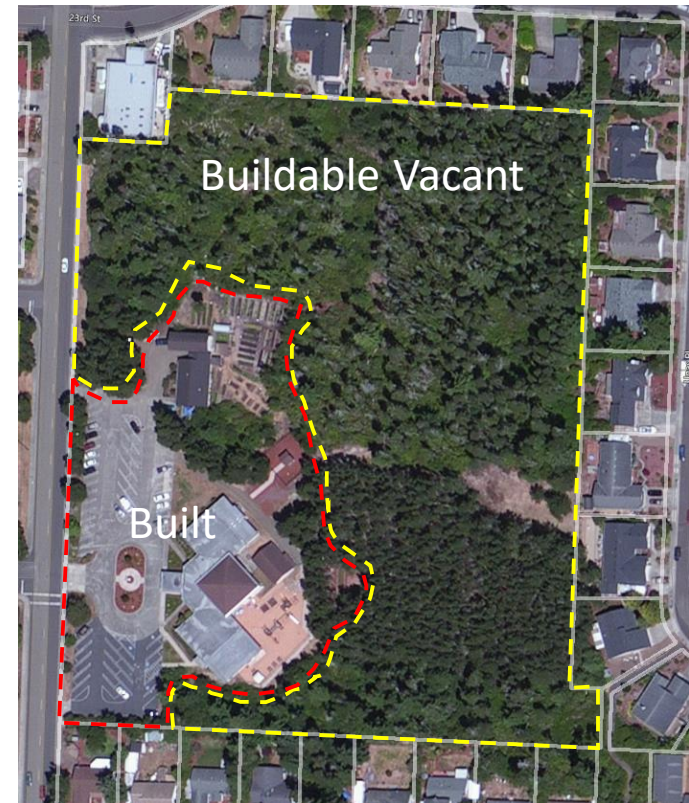
- Public and Semi Public
 - At least two acres of unconstrained land
 - Visual check to determine additional buildable land acreage

⇒ **Partial Vacant – Pub**

⇒ **Partial Vacant – SemiPUB**



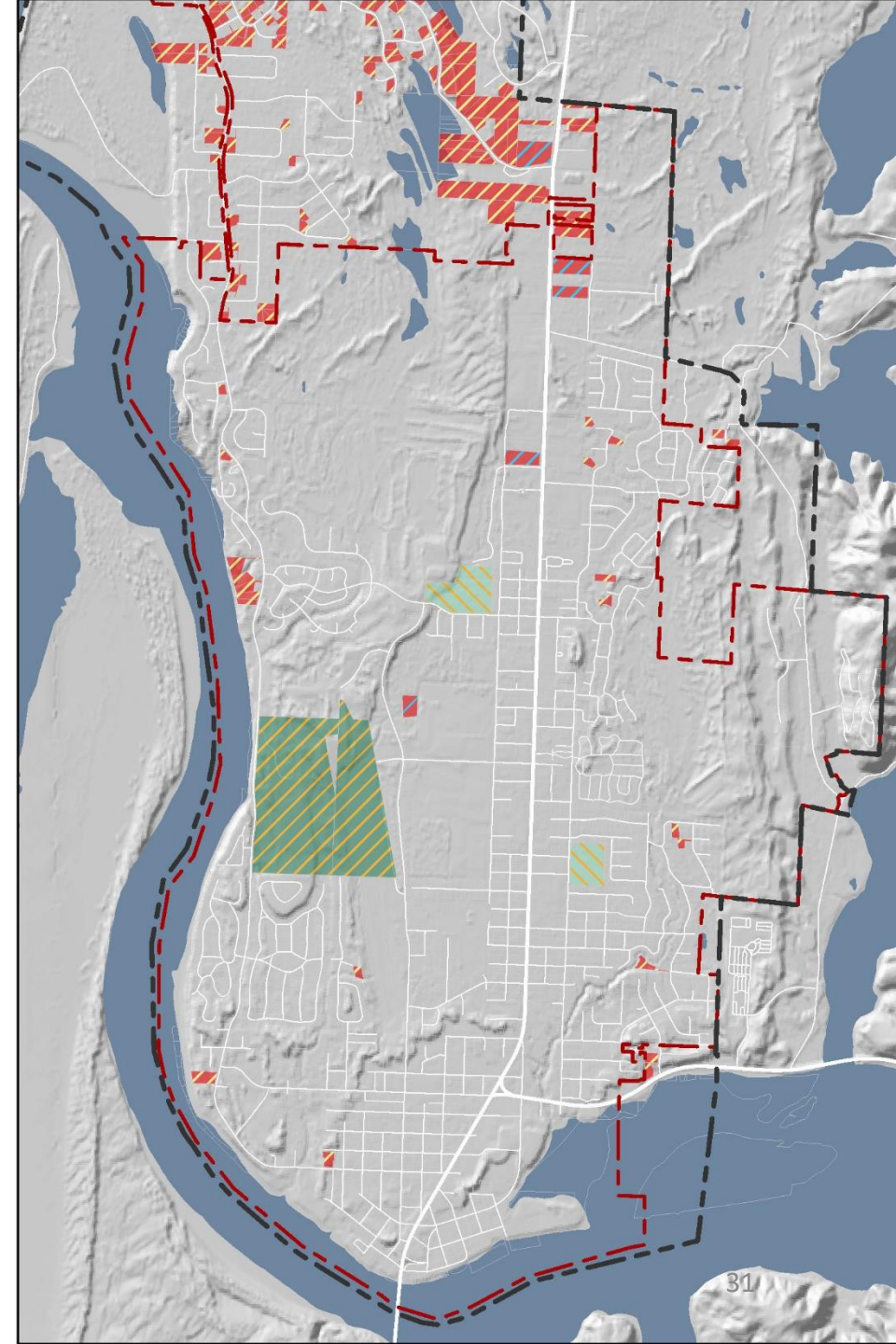
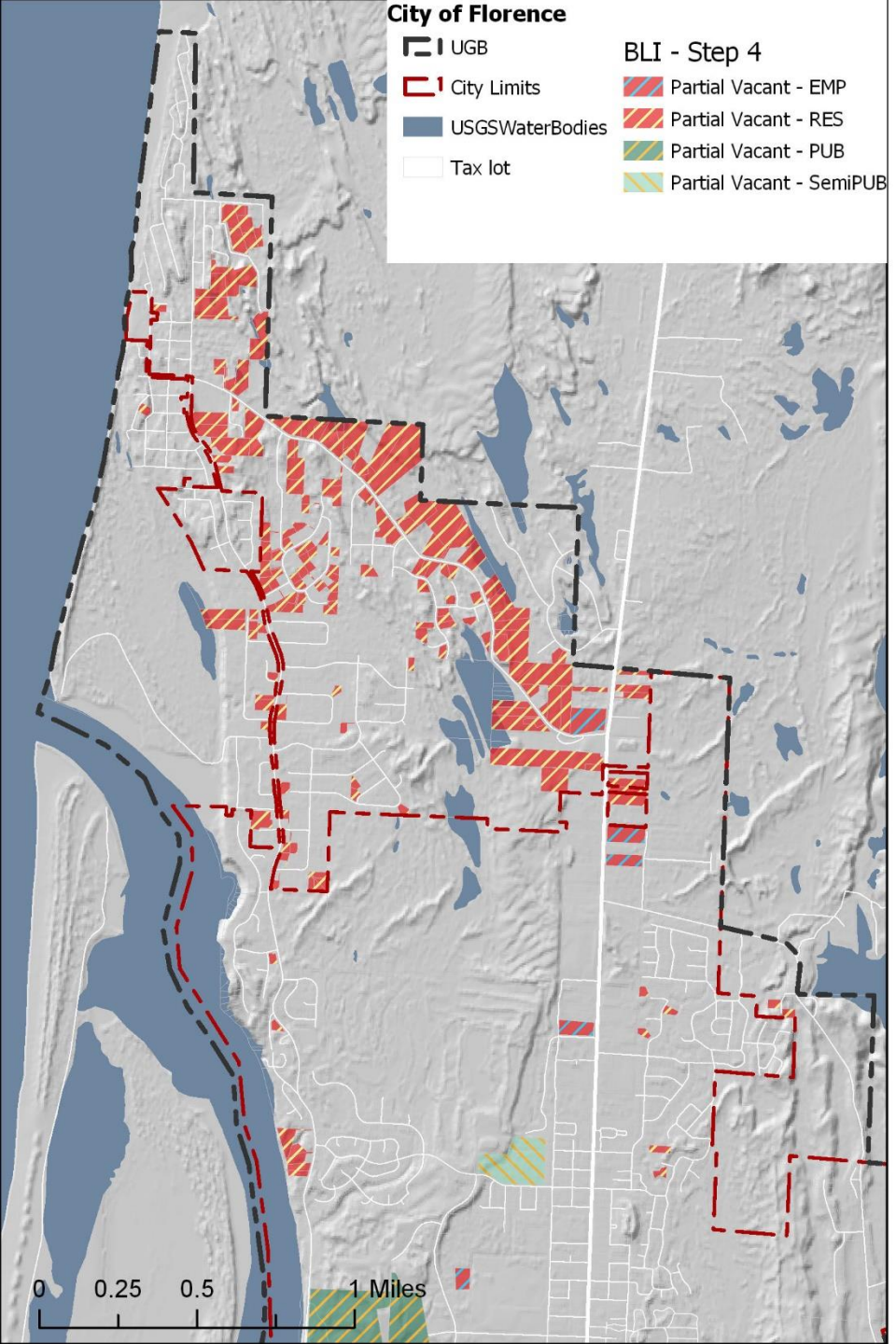
Public Land with partially vacant lots



Semi Public Land (Church) partially vacant

City of Florence

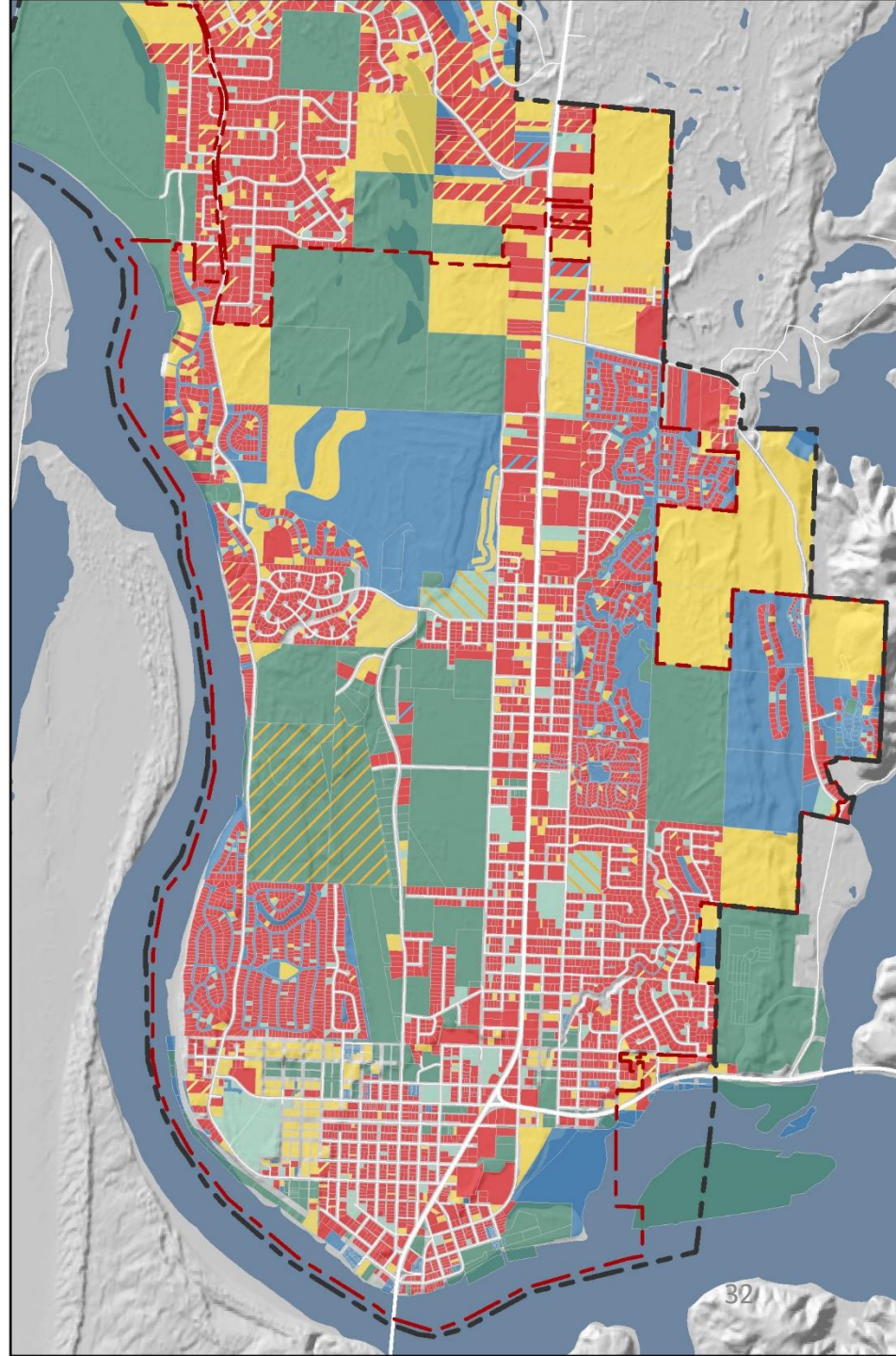
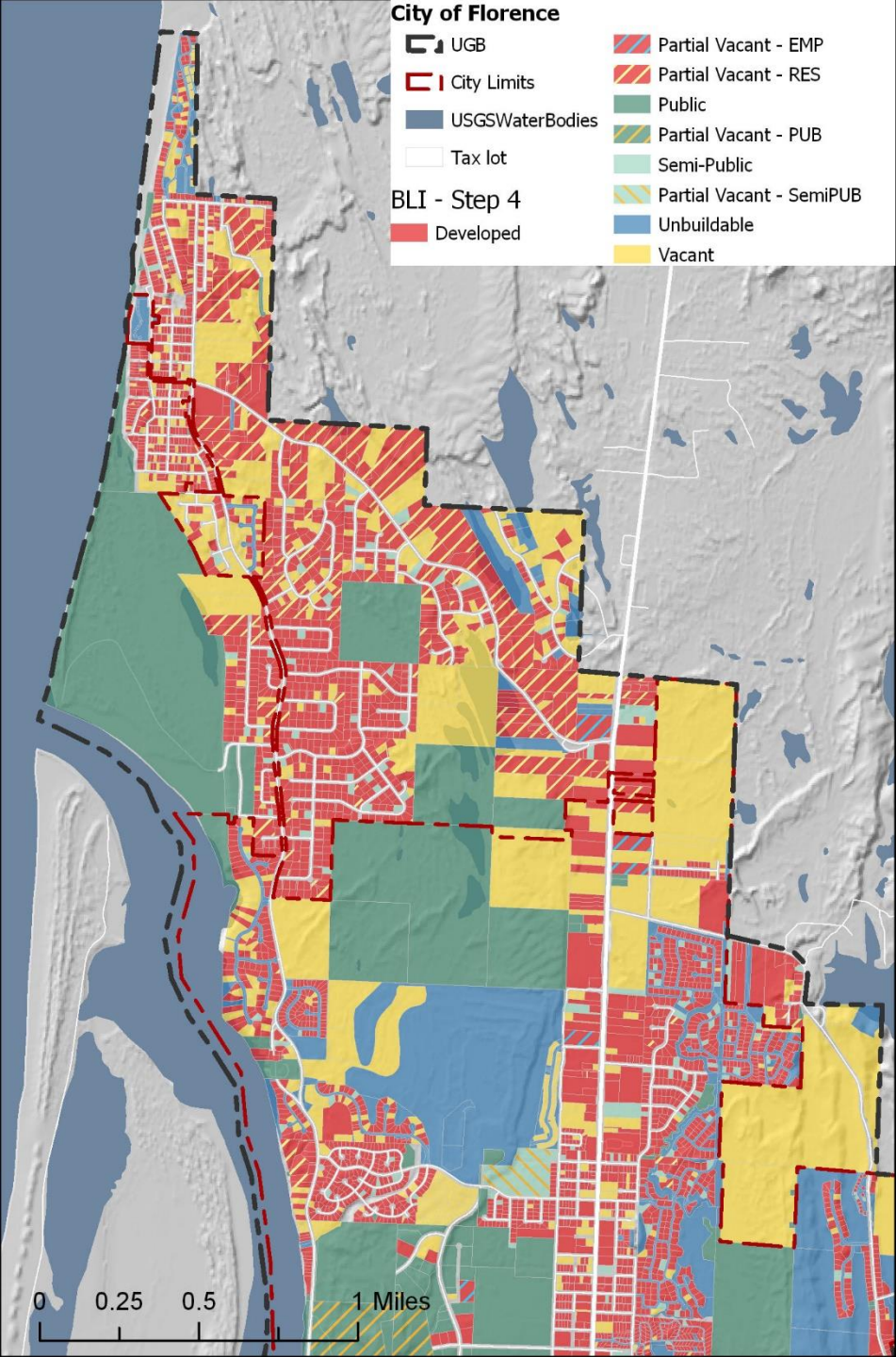
- UGB
- City Limits
- USGSWaterBodies
- Tax lot
- BLI - Step 4
 - Partial Vacant - EMP
 - Partial Vacant - RES
 - Partial Vacant - PUB
 - Partial Vacant - SemiPUB



City of Florence

- UGB
- City Limits
- USGS Water Bodies
- Tax lot
- BLI - Step 4
 - Developed
 - Partial Vacant - EMP
 - Partial Vacant - RES
 - Public
 - Partial Vacant - PUB
 - Semi-Public
 - Partial Vacant - SemiPUB
 - Unbuildable
 - Vacant

0 0.25 0.5 1 Miles



Buildable Land – 5th Step

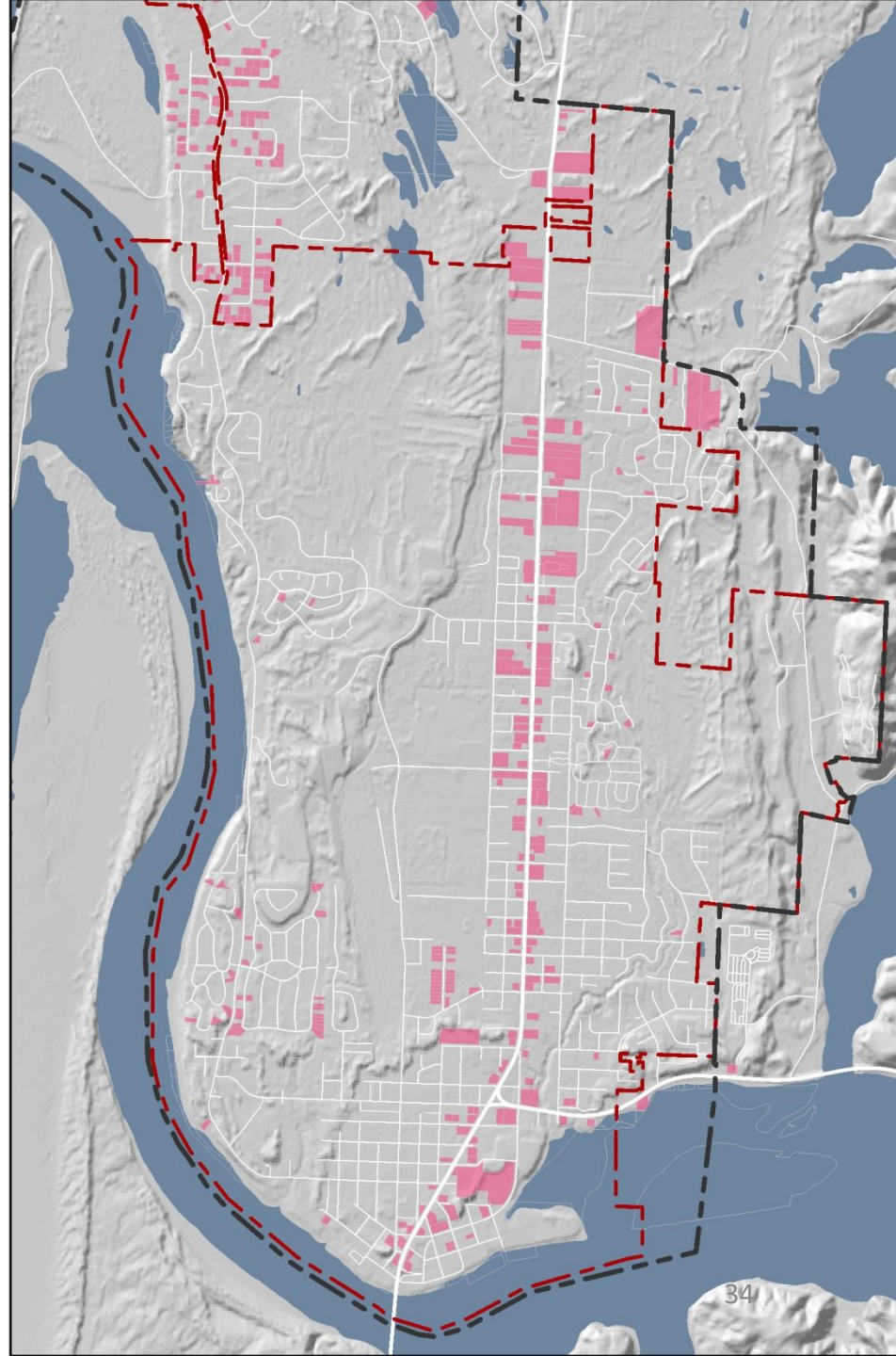
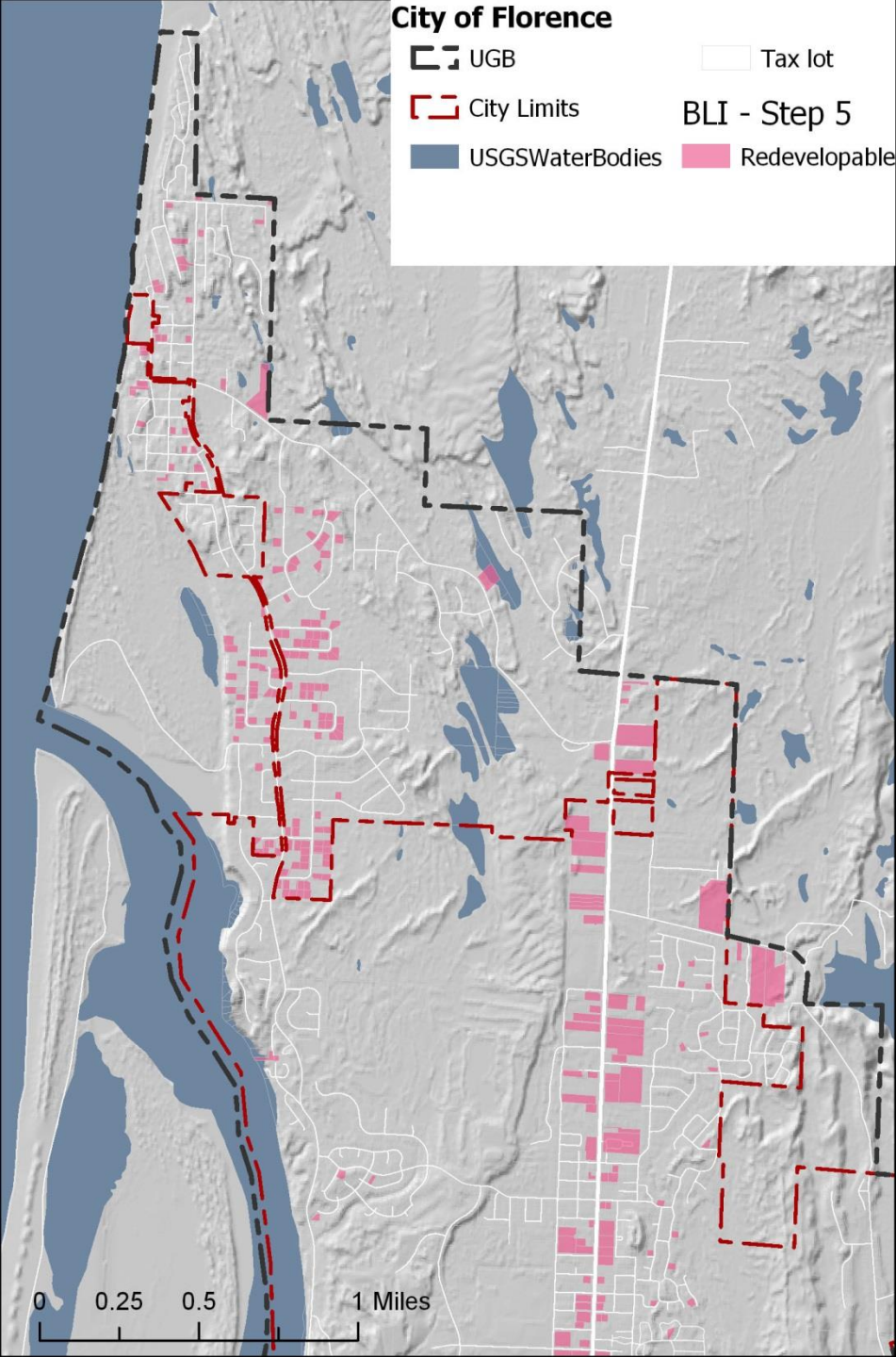
- **Developed with Potential**

- Parcels that are currently developed
- The appraised improvement value is below the land value
- The site has at least 10,000SF of unconstrained land

=>Redevelopable

City of Florence

- UGB
- City Limits
- USGSWaterBodies
- Tax lot
- BLI - Step 5
- Redevelopable



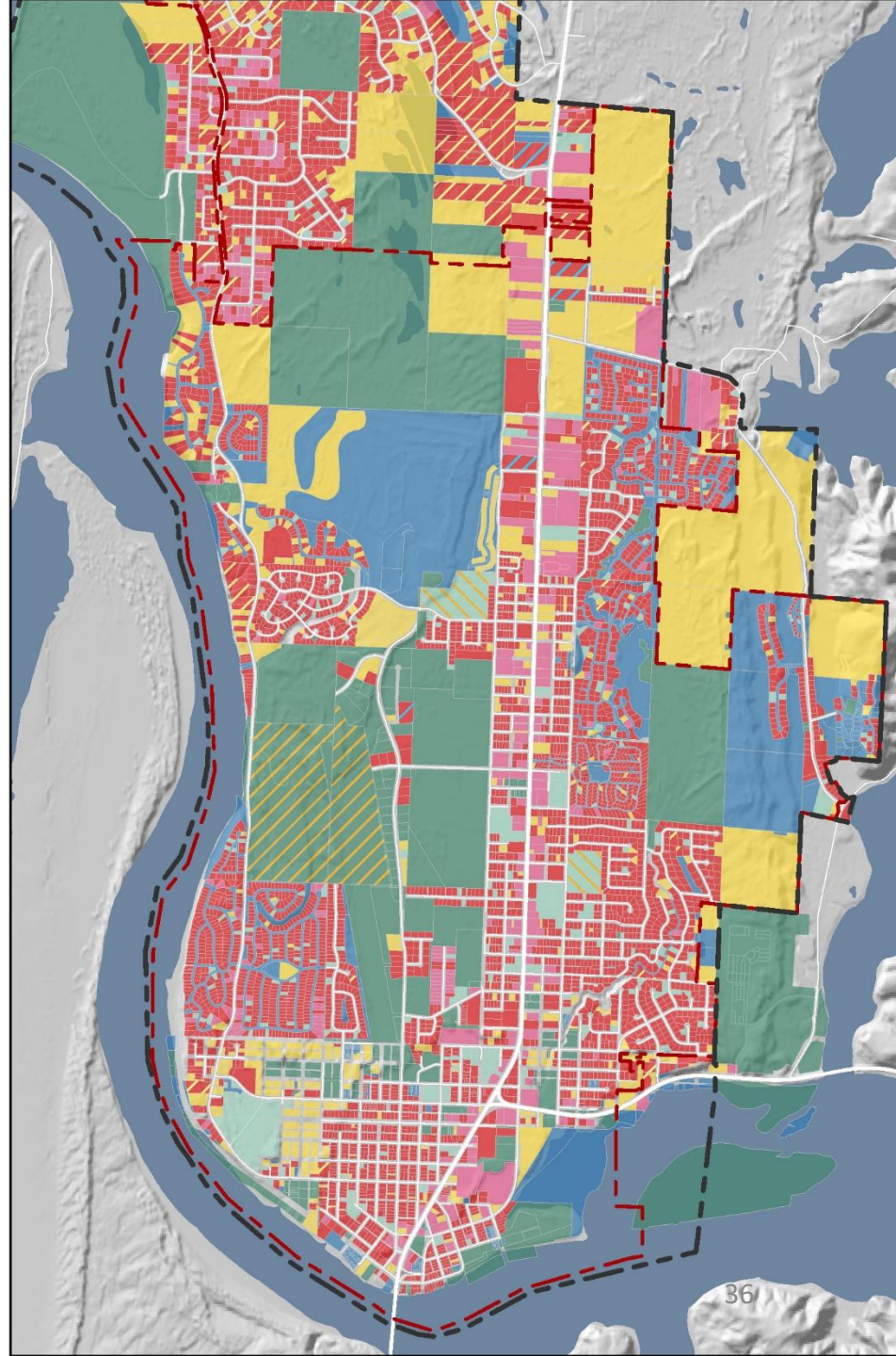
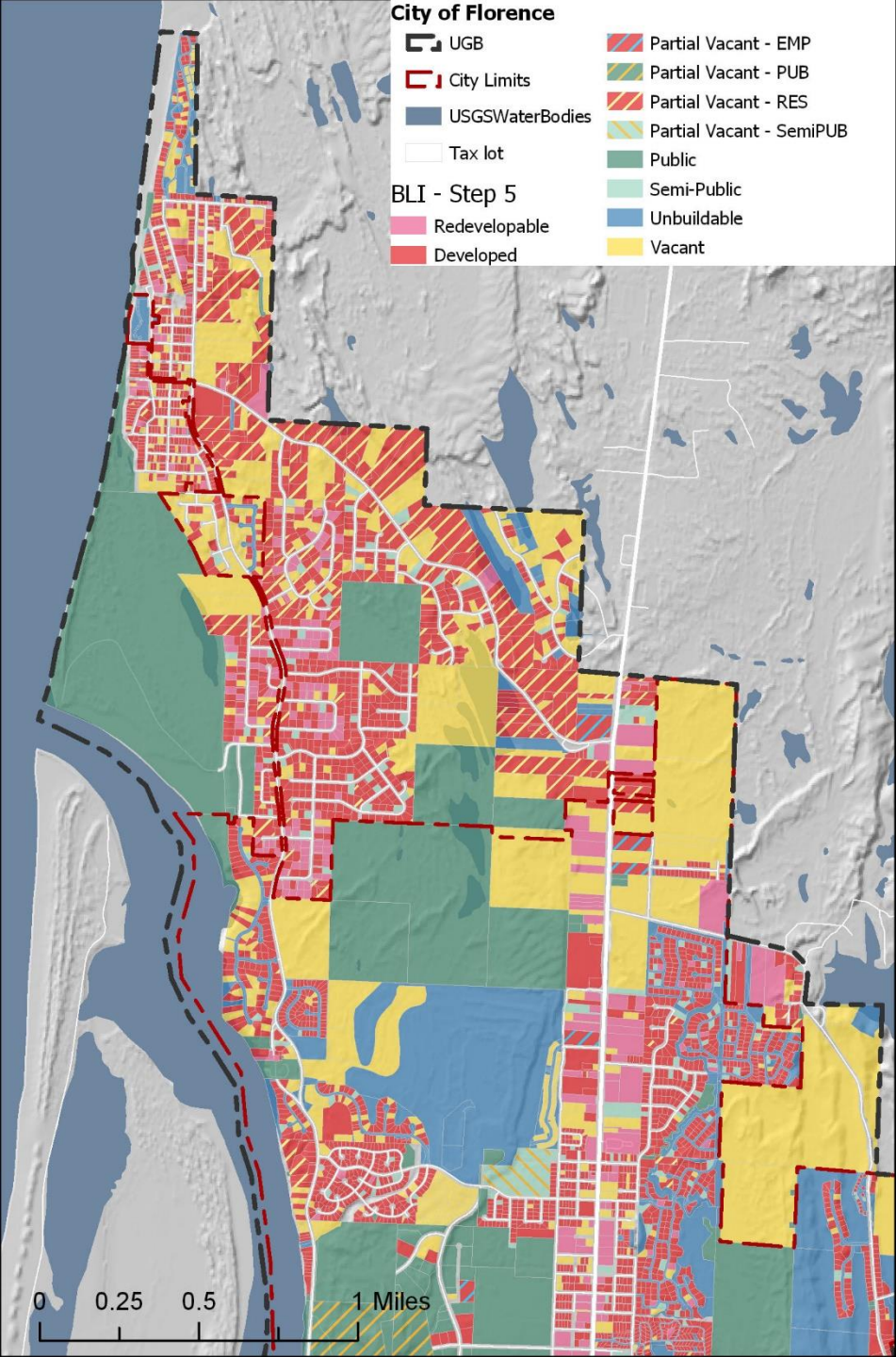
Buildable Land – 6th Step

- A closer look at restrictive zoning
- Zoning that does not allow for new development:
 - **Waiting for input**

=> **Unbuildable**

City of Florence

- UGB
- City Limits
- USGS WaterBodies
- Tax lot
- BLI - Step 5
 - Redevelopable
 - Developed
- Partial Vacant - EMP
- Partial Vacant - PUB
- Partial Vacant - RES
- Partial Vacant - SemiPUB
- Public
- Semi-Public
- Unbuildable
- Vacant



Buildable Land – Last Questions

- Public/semi-public:
 - Can public or semipublic land redevelop?
 - Should we keep the partial vacant?
- Any specific zoning categories that will restrict development?
- Overlay zoning – how will it effect development? Not all seems to be restrictive.
- Redevelopment – only on specific zoning types? As of now, parcels zoned rural residential can have potential for redevelopment.
- Unbuildable – does County definition of Unbuildable exclude redevelopment?

Summary of BLI within City

Summary of BLI in City of Florence, 2017		
BLI Category	Acres	Dist.
Vacant, Private	370.2	52%
Vacant, Public	101.8	14%
Part Vacant, Private	14.5	2%
Part Vacant, Public	74.0	10%
Redevelopable	150.3	21%
Total	710.8	100%

Source: GIS analysis by Fregonese Associates; analysis by FCS GROUP.

Summary of BLI

Buildable Land Inventory within City of Florence, 2017										
Residential Zones	Parcels					Acres				
	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	Subtotal Parcels	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	Subtotal Acres
Vacant, Private*	436	8	3	9	456	74.3	11.0	18.3	161.9	265.6
Vacant, Public/Semi Public*	37	2	0	0	39	7.7	1.8	0.0	0.0	9.5
Part Vacant, Private	11	6	0	0	17	3.4	3.6	0.0	0.0	7.0
Part Vacant, Public/Semi-Public	0	1	1	1	3	0.0	2.8	6.0	11.3	20.2
Redevelopable	88	2	1	0	91	25.6	4.6	0.0	0.0	30.2
Total	572	19	5	10	606	111.1	23.9	24.3	173.2	332.5
Employment Zones	Parcels					Acres				
	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	Subtotal Parcels	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	Subtotal Acres
Vacant, Private*	234	14	1	1	250	51.1	23.4	7.0	13.3	94.8
Vacant, Public/Semi Public*	74	21	0	1	96	23.2	35.5	0.0	32.5	91.1
Part Vacant, Private	0	4	0	0	4	0.0	7.5	0.0	0.0	7.5
Part Vacant, Public/Semi-Public	0	0	0	2	2	0.0	0.0	0.0	53.8	53.8
Redevelopable	5	0	1	0	6	49.3	50.5	12.7	0.0	112.5
Total	313	39	2	4	358	123.7	116.8	19.7	99.6	359.8
Mixed Use Zones	Parcels					Acres				
	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	Subtotal Parcels	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	Subtotal Acres
Vacant, Private*	9	1	1	0	11	1.9	2.8	5.1	0.0	9.8
Vacant, Public/Semi Public*	1	1	0	0	2	0.2	0.9	0.0	0.0	1.2
Part Vacant, Private	0	0	0	0	0	0.0	0.0	0.0	0.0	0.0
Part Vacant, Public/Semi-Public	0	0	0	0	0	0.0	0.0	0.0	0.0	0.0
Redevelopable	5	0	1	0	6	2.1	0.0	5.4	0.0	7.6
Total	15	2	2	0	19	4.3	3.7	10.6	0.0	18.5
Notes:										
* identified as vacant in Lane County assessor data										
Source: GIS analysis by Fregonesse Associates; analysis by FCS GROUP.										

Next Steps

- Review and Refine Assumptions
- Compare Land Supply (BLI) to Land Need
- If City of Florence BLI is inadequate to meet 20-year land need:
 1. consider zone changes
 2. consider new annexation areas within UGB