WELCOME TO THE JOINT STRATEGY SESSION

IF YOU...

- **COMPLETED THE WORKING GROUP PREFERENCE SURVEY** you will find your name under your first choice selection.

- **DID NOT COMPLETE THE SURVEY** please sign up for a working group.
  - →We recommend you select a topic with which you have some familiarity.

Groups are limited to 16 participants. If your first choice is full, you must join another group.

REGIONAL
HOUSING STRATEGY

Central Ohio Regional Housing Strategy

Joint Strategy Session

February 7, 2020

Agenda

- Welcome & introductions

- Presenting an emerging picture of the region's housing needs

- Establishing guiding principles

- Working group discussions on potential future actions

- Wrap-up & next steps

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Meeting Objectives

By the end of this meeting, we will have:

Built **connections** between stakeholders involved in the RHS process	Reached agreement on the **principles** that will guide strategy decisions in the future	Introduced a menu of **potential actions** the region could take	Identified **priority actions** the group would like to learn more about

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Ice-breaker

Stand or raise your hand if…

**You have lived in Central Ohio
for 1 year or more**

Ice-breaker

Stand or raise your hand if…

**You have lived in Central Ohio
for 5 years or more**

Ice-breaker

Stand or raise your hand if…

**You have lived in Central Ohio
for 10 years or more**

Ice-breaker

Stand or raise your hand if…

**You have lived in Central Ohio
for 25 years or more**

Ice-breaker

Stand or raise your hand if…

You work in the public sector

Ice-breaker

Stand or raise your hand if…

You work in the private sector

Ice-breaker

Stand or raise your hand if…

You work in the philanthropic sector

Ice-breaker

Stand or raise your hand if…

You would characterize your day-to-day work as focused on <u>housing</u> most or all of the time

Ice-breaker

Stand or raise your hand if…

You didn't stand or raise your hand for the previous statement

What would you say your day-to-day work is focused on most or all of the time (in a couple words or less)?

Ice-breaker

Round-robin introductions

- Name
- Organization

Putting this meeting in context

Where are we in the RHS process? How does this meeting fit in?

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What does a successful RHS look like?

Process
- Community-driven
- Collaborative

Recommend-ations
- Action-oriented
- Sustainable
- Measurable impact

Results
- Strengthened capacity
- Improved access to opportunity
- A more inclusive housing market

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HOUSING STRATEGY

November meeting re-cap

Data walk

- Regional housing perspectives

- Overview of regional housing supply & demand

- Homeownership trends

- Rental trends

- Housing instability & access

- Impediments to housing development

- Building costs analysis

- Current use of public & private dollars

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November meeting re-cap

Some of the feedback we received:

Areas to dig deeper

- How are these trends impacting specific sub-populations

- What's driving consumer preferences around renting vs. owning?

- Information on single-family rentals

- Adverse housing outcomes (e.g. evictions, mortgages)

- Drivers of development costs
  - Challenges for building at the lowest income levels
  - Role of construction costs
  - What causes delays and variation?

- Connections with jobs and transit

- How do resources align with the needs?

- What are practical solutions? What roles do different types of stakeholders play in those solutions?

There is interest in having more conversations that build relationships among stakeholders involved in this process

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Since November, we have…

Launched the RHS Speaker Series

Planned 4 regional workshops and 10 focus groups – *dates & times forthcoming*

Gathered potential case studies on best practices in housing finance

**Completed an inventory of 35+ funding sources for housing in the region**

Conducted a second round of quantitative analysis, building on the feedback from our last meeting

Hosted a second technical review meeting and finalized the housing submarkets analysis

Drafted a menu of nearly 100 potential actions

Analyzed the regulatory environment affecting development in 10 representative municipalities across the region

Project timeline
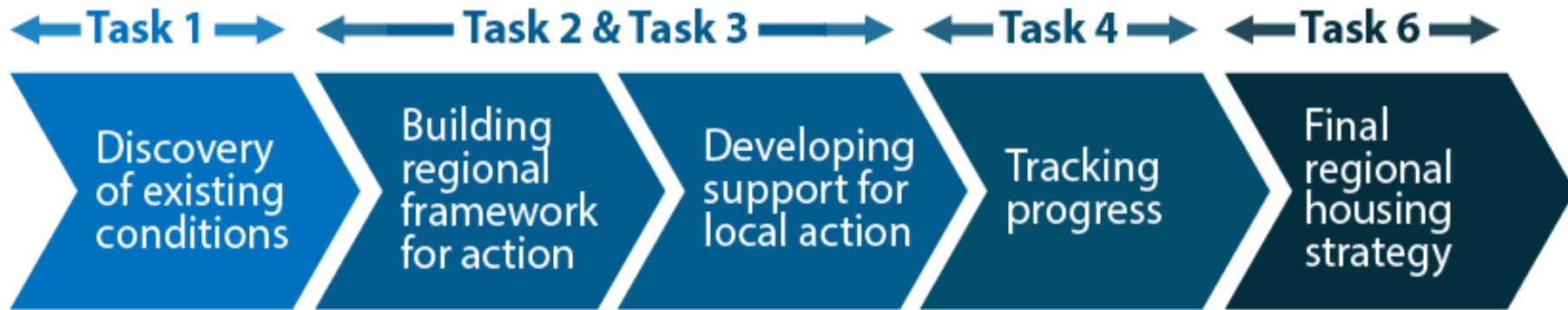
Nov 2019
Review & prioritize regional housing needs

Feb 2020
Joint strategy session #1

Apr 2020
Joint strategy session #2

May 2020
Finalize recommendations & discuss implementation

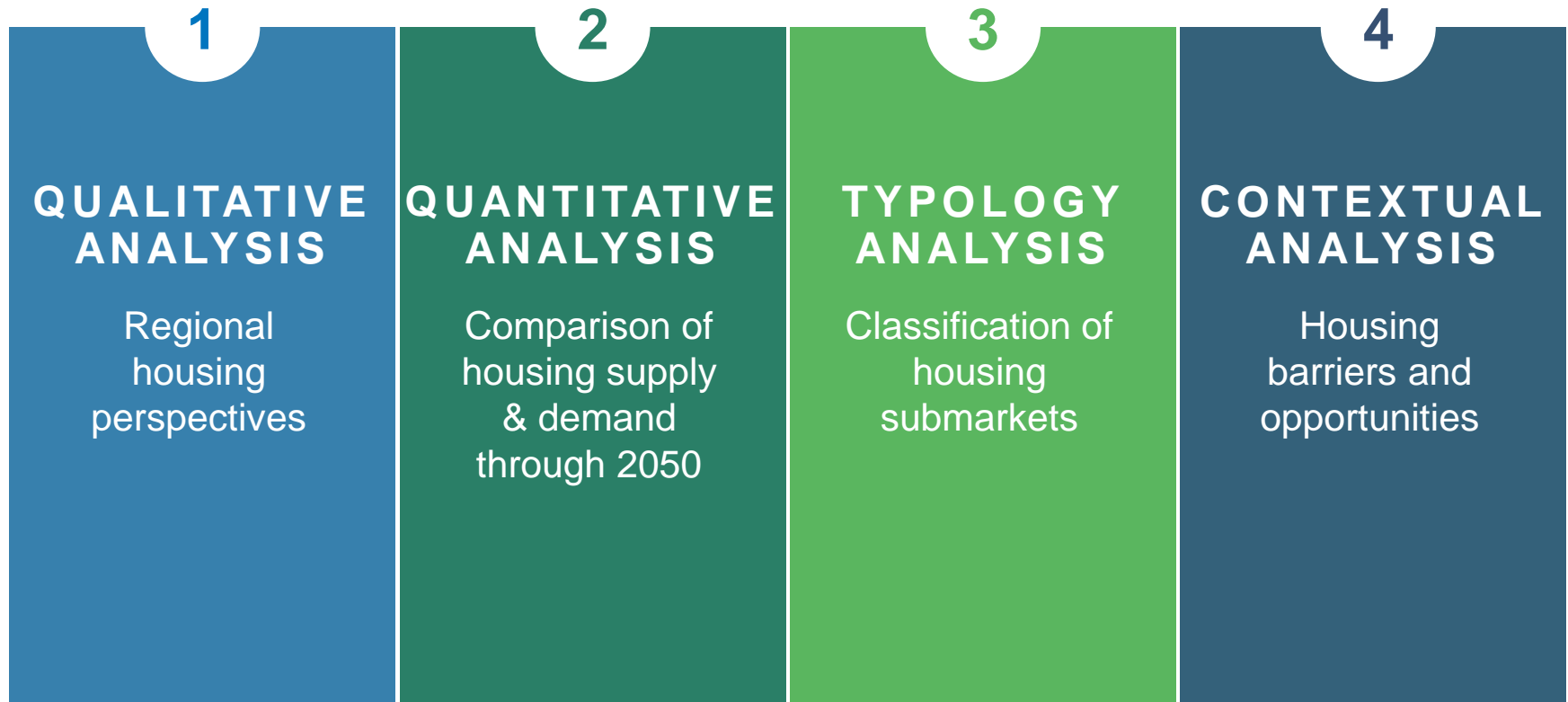**In between these meetings:**

- Regional workshops
- Webinar on housing submarkets analysis
- Focus groups

Grounding the discussion

An emerging picture of the region's housing needs

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Research Plan overview

1

QUALITATIVE ANALYSIS

Regional housing perspectives

2

QUANTITATIVE ANALYSIS

Comparison of housing supply & demand through 2050

3

TYPOLOGY ANALYSIS

Classification of housing submarkets

4

CONTEXTUAL ANALYSIS

Housing barriers and opportunities
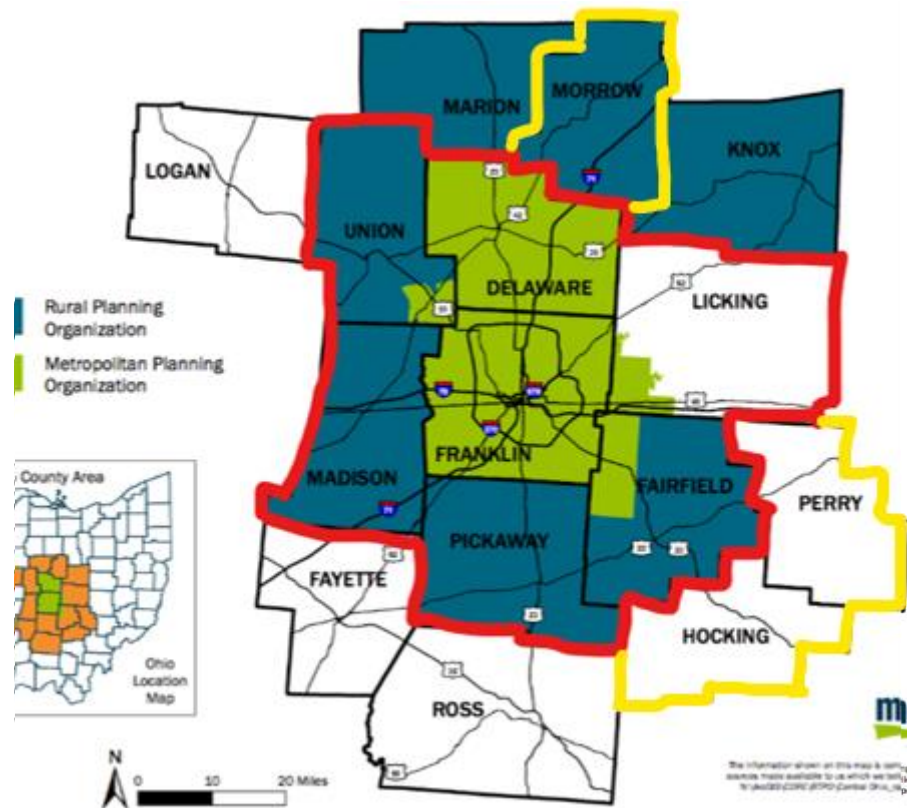
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Geographies of analysis

Within the 7-county regional study area:

- Region-wide*
- Submarkets
- Counties
- Representative municipalities
- Census Tracts

For some datasets where data for all 7 counties was not available, data for the Columbus MSA was substituted

7-county study area
Additional counties in the Columbus MSA

Research process

Develop research plan
- Compile & clean data
- Build methodologies

Round 1 analyses
- Gather feedback on Round 1
- Identify & prioritize additional research questions

Round 2 analyses
- Synthesize findings across streams of analysis
- Fill critical gaps in the narrative

Roll-out findings
- Technical Report #1
- Webinars
- Recommendations for future analyses

Data sources

RHS community survey – distributed to 3,000+ Central Ohioans

50 different datasets analyzed, including:
- American Community Survey
- Comprehensive Housing Affordability Summary
- Zillow
- PolicyMap
- National Housing Preservation Database
- Local auditor data
- Eviction Lab
- Home Mortgage Disclosure Act
- MORPC population projections

Interviews; focus groups; regional developers survey – distributed to 100+ developers (small, large, for-profit, nonprofit, etc.)

National literature review; analysis of local pro formas; regional developers survey

Programmatic documents across 35+ funding sources for multifamily development and homeownership

Content analysis of 25+ regional reports, plans and studies

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What are the housing challenges we need to tackle in Central Ohio?

Challenge #1. Increased competition for homes

Challenge #2. Barriers limiting access to homes

Challenge #3. Limited supply of homes priced for low-income households

Challenge #4. Demand for more homes that can serve a wider range of ages, abilities, and households

Challenge #5. Housing instability among Central Ohioans

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CHALLENGE #1
Increased competition for homes in Central Ohio

What factors are shaping increased competition for homes?

- **Population growth**
  - Growth by nearly 24,000 residents annually (2010-2018)
  - Increasingly concentrated in Franklin County (72 percent of 2010s growth)
  - Need for 246,000+ housing units through 2050*

- **Low rate of housing production**
  - Historically low residential construction relative to population growth (2010s)
  - Three people for every new housing unit built (2010-2018)

- **Impact of The Great Recession**
  - Increased demand for rental units and corresponding rise in rents
  - Increased home sale activity and prices
  - Lower housing costs among existing homeowners

*HOUSING DEMAND THROUGH 2050 IS A COMBINATION OF EXISTING RESIDENTS' CHANGING DEMAND AND DEMAND GENERATED BY NEW RESIDENTS

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**Seven-county demand projections
Household growth, 2018-2050**
Sources: VSI, MORPC

Barriers limiting access to homes in Central Ohio

What barriers affect access to homes in Central Ohio?

- **Disparities in lending practices**
  - Higher home loan denial rate among households of color (relative to white households and average regional rate)
  - Lower home loan applications among households of color

- **Creditworthiness**
  - Ranked as one of the top three barriers by regional housing providers

- **Impact of housing instability**
  - Difficulty finding a new home due to a past eviction or limited rental history

- **Housing discrimination**
  - Discrimination affecting persons with disabilities and people of color (per most commonly reported complaints)

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CHALLENGE #3
Limited supply of homes priced for low-income households

What factors are shaping the region's limited supply of low-income homes?

- **More homes for higher income households**

Share of units by year built & rent in buildings with 20+ units, Central Ohio
Source: VSI Multifamily Commercial Property Database

Time period	Less than $800	$800 - $1,119	$1,200 - $1,999	$2,000 or greater
1960s	59.3%	39.2%	1.6%	0.0%
1970s	69.8%	33.5%	2.8%	0.0%
1980s	28.0%	59.3%	12.7%	0.0%
1990s	21.8%	57.6%	20.7%	0.0%
2000s	16.5%	55.0%	27.1%	1.5%
2010s	7.1%	30.9%	54.5%	7.6%

Units priced for households earning $35,000 or less.

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CHALLENGE #3
Limited supply of homes priced for low-income households

What factors are shaping the region's limited supply of low-income homes?

- **Loss of more affordable single-family rentals**
    - More affordable than other property types listed on the market (~$1/sq. ft)
    - Conversion of single-family rentals back into owner-occupied units

- **Need for housing assistance**
    - **Housing voucher waitlist:** 17,200 people
    - Potential loss of more than **11,500 publicly assisted units** through 2025
    - Projected demand for rental units among households
      earning less than $30,000

More homes that can serve a wider range of ages, abilities, and households

What demographic trends are shaping regional housing needs?

- **Increased racial and ethnic diversity**
  - International migration = one-quarter of the region's population growth (2010s)

- **Growth in older adults/seniors (55+ years old)**
  - 1 in 5 households with at least one senior (65+ years old) (2017)
  - 25% of projected demand through 2050 among aged 62+ years old

- **Growth in Millennials (25-39 years old)**
  - From 2012 to 2017, 63% of residents who moved to the region were Millenials
  - Only partially attributable to students

- **Special needs populations**
  - Persons living with disabilities, persons experiencing homelessness, restored citizens and emancipated youth, among others.

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Today, Central Ohio's housing supply is predominantly single-family, detached homes. Increases in large-scale (50+ units) and smaller-scale (5-9 units) apartment buildings are diversifying the region's housing supply.

Housing types, Central Ohio (2018)
Source: U.S. Census Bureau, 2010 and 2018 American Community Survey 1-Year Estimates; Table B25032; Columbus MSA

	Number	Percent	Percent change 2010-2018
1, attached	62,150	7.1%	5.7%
1, detached	536,169	61.7%	10.9%
2	23,777	2.7%	-0.2%
3 or 4	53,559	6.2%	-1.8%
5 to 9	72,253	8.3%	12.0%
10 to 19	43,285	5.0%	-1.9%
20 to 49	26,699	3.1%	14.5%
50 or more	31,465	3.6%	37.5%
Mobile home	19,942	2.3%	13.6%

CHALLENGE #5
Housing instability among Central Ohioans

- **Cost burdens**
  - More than 213,000 households in Central Ohio pay at least 30 percent of their income on housing costs.
  - Affecting renters more frequently:
    - 43% of all renters vs. 20% of all homeowners
  - Affecting low income households more frequently:
    - 64% of households earning <$50K vs. 7% of households earning $50K+
- **Evictions**
  - 35 renters evicted daily (2016)
    - **National:** 2.34 evictions per 100 renters
    - **Central Ohio:** 4.10 evictions per 100 renters
    - **High-poverty areas in Central Ohio:** 9.70 evictions per 100 renters
    - **Majority African-American areas in Central Ohio:** 8.70 evictions per 100 renters

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Housing instability among Central Ohioans

- **Homelessness**
  - ~10,100 families and individuals served by emergency shelters (2018-2019):
    - 7,600 individuals
    - 2,000 families
    - 485 unaccompanied children

- **Homes in need of repair**
  - Median age of homes: 40 years old
  - Median age of large multifamily properties: 30 years old
  - Costs associated with upkeep (e.g. energy costs, expensive long-term repairs)
  - Fewer programs focused on rehabilitation and energy
    - **Programs available regionally for rehabilitation:** 4 programs
    - **Programs available regionally for energy:** 3 programs

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Who is most acutely affected by these challenges?

- **Low-income households**
  These households have to compete for a limited supply of homes priced for them and their need for housing-related assistance dwarfs the assistance available in the region.

- **Families with children**
  Families with children account for most households making less than $35,000 annually. Single mothers are especially vulnerable in the region's housing market.

- **People of color**
  Disparities in terms of cost-burden rates, evictions, homeownership lending practices, poverty, homelessness, and access to opportunity exist among people of color.

- **Older Adults**
  Older adults will continue to make up an increasing share of households in the region as the Baby Boomers age. Older adults living alone are especially vulnerable in the region's housing market.

- **Middle-income households**
  While there are more housing options available that are affordable to middle-earning households, there is competition on that supply from low-earners who have fewer options, and higher-earners (especially renters) who could afford more but tend to opt to pay less on housing.

- **People living with disabilities**
  Persons living with disabilities (225,000 residents) face a limited supply of homes accessible and affordable to them and long waitlists for them.

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# How do these challenges vary across Central Ohio?

Housing instability

- **Regional trend:** The number of cost-burdened households fell regionally.

- **Regional variation:** Renter households earning less than $50,000 annually in **Fairfield, Franklin, and Pickaway** counties have seen cost burdens increase.

- **Regional trend:** Low-income cost-burdened households are more likely to be renters, and middle- to high-income cost-burdened households are more likely to be homeowners.

- **Regional variation:** Homeowners are more likely to be cost-burdened than renters at all income levels in **Delaware, Madison, and Union** counties.

Anticipated growth through 2050

- **Most projected housing demand is concentrated in three counties:**
  1. **Franklin County:** 71 percent
  2. **Delaware County:** 13 percent
  3. **Licking County:** 7 percent

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Projected housing demand by county
All households, 2018-2050
Sources: VSI, MORPC
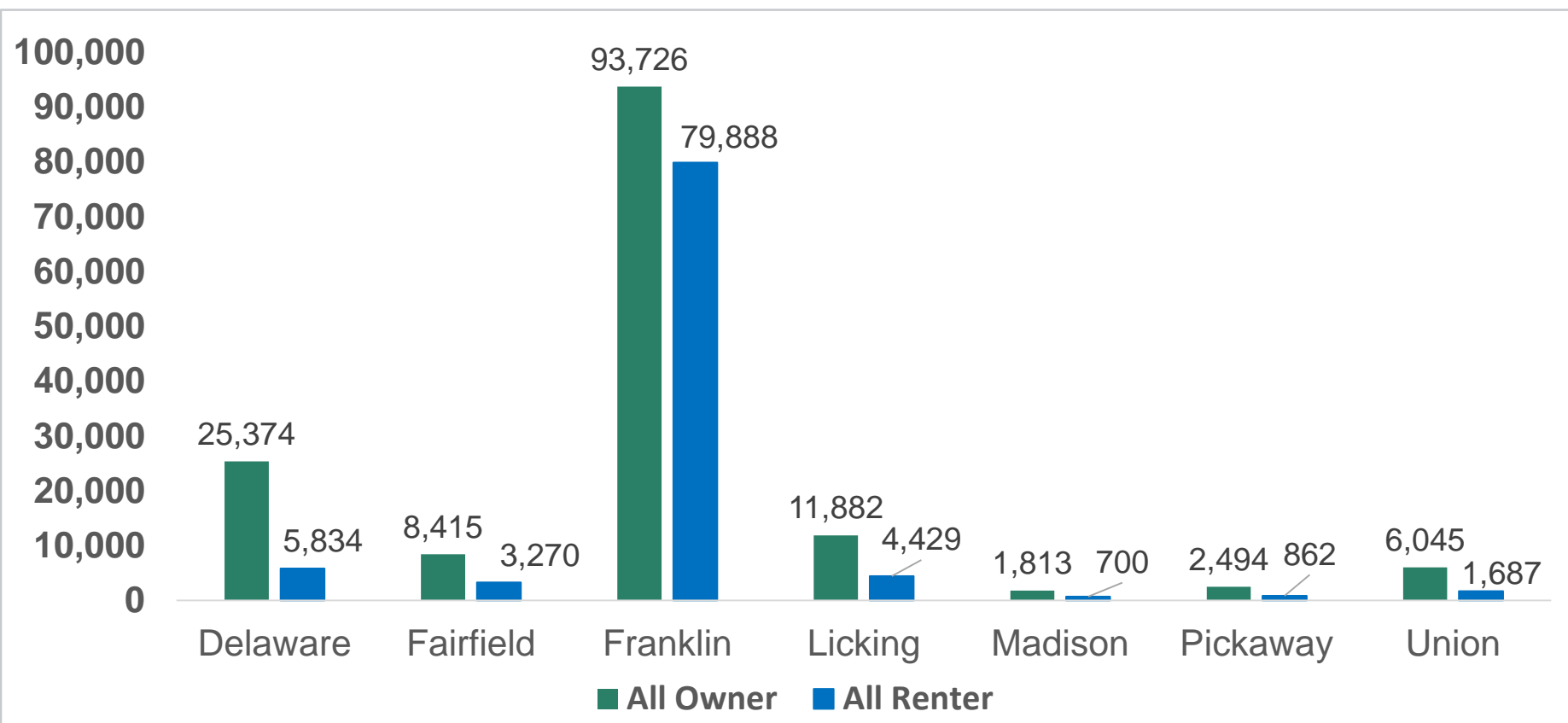
Do we have the capacity to tackle all these challenges?

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Key takeaways about regional resources

- **Large number of programs and funding types**
  - 52 housing or housing-eligible subsidy programs available

- **Opportunities for more flexible tools**
  - Gap-financing programs tools that are not AMI-limited
  - Tax Increment Financing
  - Property Tax Abatements
  - New Community Authorities (special taxing districts)
  - Bond proceeds

- **Lack of coordinated information**
  - Resources not collectively housed in a singular, one-stop source

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Snapshot of regional resources

BY INCOME LEVEL:
- 30-50% AMI: 50 programs
- 60% AMI: 43 programs
- 70-80% AMI: 35 programs
- 90%+ AMI: 15 programs

BY ACTIVITY:
- Construction: 11 programs
- Downpayment: 4 programs
- Rehabilitation: 4 programs
- Rent/mortgage: 3 programs
- Energy: 3 programs

Available resources for housing
Source: IceMiller

Pie chart values:
- Fund: $292,190,138
- Senior debt: $50,000,000
- Junior debt: $120,000,000
- Gap financing: $179,416,184
- Equity: $212,016,184
- Down payment: $47,176,046

Legend:
- Fund
- Senior debt
- Junior debt
- Gap financing
- Equity
- Tax abatements
- Down payment

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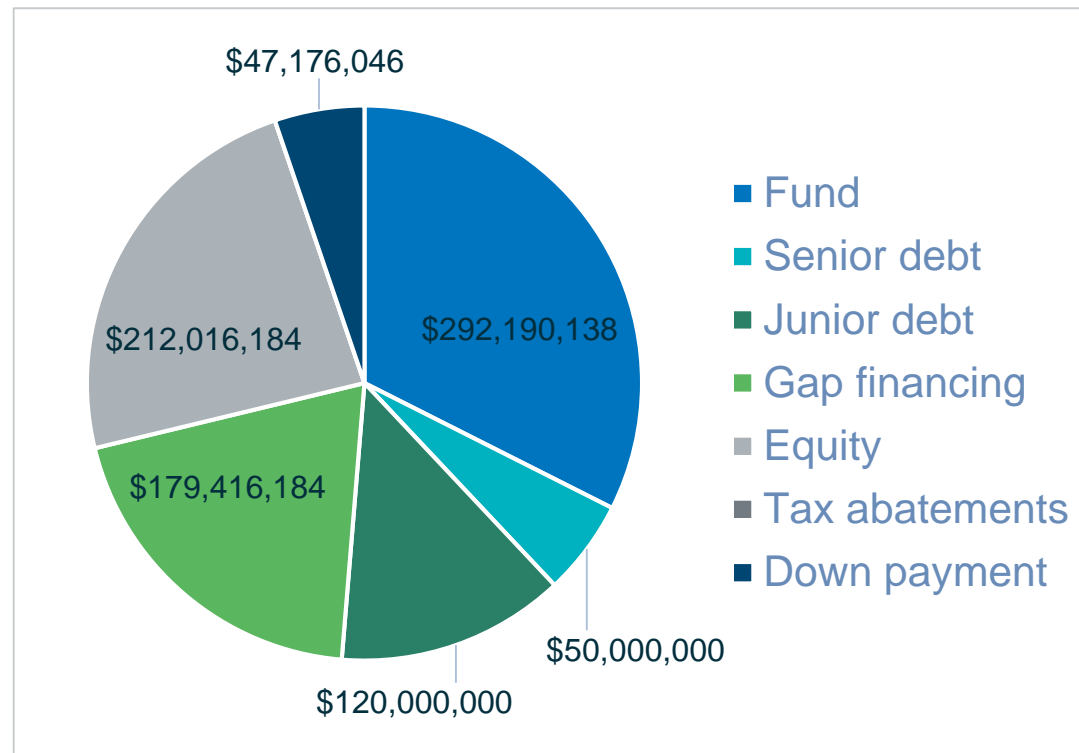
Central Ohio will need to address these barriers to effectively tackle its housing challenges.

- **Barrier #1. Uncertainty associated with local land use processes and standards**
  Land use approvals across Central Ohio generate added uncertainty to already time-consuming and expensive development processes.

- **Barrier #2. Higher costs of residential development**
  The increased cost of construction materials and labor is one of the biggest drivers of the economics of residential development in Central Ohio. Other factors include site selection, regulatory costs and land costs.

- **Barrier #3. Not-In-My-Backyard (NIMBY) attitudes**
  Regional developers said lack of public and political support affects development feasibility in Central Ohio. Negative perceptions about denser or subsidized homes result in people voicing their disapproval locally.

- **Barrier #4. More need for direct assistance than available resources**
  The need for housing-related assistance among low-income households, such as rental assistance and home repairs, dwarfs the assistance available in the region.

Uncertainty associated with local land use processes and standards

The following aspects of land use processes increase uncertainty:

- Overall time associated with regulatory processes

- Rezoning processes

- Inconsistencies in neighborhood-level processes for reviews and approvals

- Reliance on variances in some jurisdictions

The following land use standards differ by community:

- Lot sizes

- Setbacks

- Widths for single-family and multifamily development

- Number of zoning districts per capita

Higher costs of residential development

Construction labor and materials costs

- The rise in construction costs since 2016 has the largest impact on **multifamily construction costs** on a per-square-foot basis:
  - Construction costs increased by $26.16 per square foot to $182.04 per square foot.

Site selection

- There is a mismatch between what developers are building and local land-use standards, resulting in rezoning requests.

Land costs

Land for multifamily development varies across the region.

- The highest land value of parcels zoned for multifamily development of 40+ units is in **Delaware County** ($1.1 million) and the lowest is in **Pickaway County** ($145,452).

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Higher costs of residential development

Regulatory costs

- Regional developers estimate regulatory costs account for **~26 percent** of total development costs.

Regulations with the biggest impact on development in Central Ohio

- Changes to building codes over the past 10 years
- Development requirements that go beyond the basic standards (e.g., changes in property layout, landscaping, materials used on building facades)
- Cost of complying with affordability mandates*

*THIS COST APPLIES TO A MUCH SMALLER SHARE OF DEVELOPMENT PROJECTS THAN THE OTHER TWO FACTORS.

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Not-In-My-Backyard (NIMBY) attitudes

Public and political support for denser or subsidize development

- Regional developers believe NIMBY attitudes affect development feasibility in Central Ohio.

- They ranked **political and neighborhood perception** as the top item negatively affecting development feasibility across the region, over 14 other items.

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More need for direct assistance than available resources

Need vs. available resources

Home repairs*

- **Requests for home repairs:** 1,200 people
- **Resources available for home repairs:** 90 projects

Housing assistance*

- **Publicly assisted housing units:** 34,000 units
- **Rental assistance in use:** 16,000 vouchers
- **Housing voucher waitlist:** 17,200 people
- **Waitlist for special needs unit:** 7,000 people

*INFORMATION FOR CITY OF COLUMBUS/FRANKLIN COUNTY ONLY

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BREAK

We will reconvene in
5 minutes.

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Starting to build the strategy framework

Establishing guiding principles

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VISION

What will we achieve with this strategy?

GUIDING PRINCIPLES

How do we know our actions are fulfilling that vision?

REGIONWIDE STRATEGIES

SUBMARKET STRATEGIES

What process will we follow to address housing needs and build our capacity for the future?

ACTIONS TO ADVANCE REGIONWIDE STRATEGIES

ACTIONS TO ADVANCE SUBMARKET STRATEGIES

What steps will we take to implement that process?

METRICS TO TRACK PROGRESS

How will we evaluate our progress towards our vision?

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GUIDING PRINCIPLES

How will we know our actions are fulfilling that vision?

Concise statements of our values that unpack the vision.

- What does an "inclusive housing market" mean to us?

- What matters most when we're talking about "access to opportunity"?

- Our regional housing efforts should advance _____ .

Potential guiding principles were derived from:
> Community Survey Results
> Kickoff meeting feedback
> Content analysis of recent plans in the region
> RHS quantitative analysis findings

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HOUSING STRATEGY

GUIDING PRINCIPLES

- Our regional housing efforts should advance _____ .

Equity	Diversity	Neighborhood Revitalization
Growth	Density	Deconcentrating Poverty
	Affordability	Accessing Opportunity
	Accessibility	
	Energy Efficiency/Climate Adaptation	
	Health and Safety	

REGIONAL
HOUSING STRATEGY

GUIDING PRINCIPLES

- Our regional housing efforts should advance _____ .

| Equity | By focusing on populations with the greatest need to reduce disparities and inequalities |
| Growth | By focusing on increasing the overall supply of housing to sustain/increase long-term growth |

REGIONAL
HOUSING STRATEGY

GUIDING PRINCIPLES

- Our regional housing efforts should advance _____ .

Diversity	By offering a wide range of housing options
Density	By supporting a more compact development pattern (may include: infill, multifamily building)
Affordability	By ensuring new housing is offered at all price points and preserving/expanding existing affordability
Accessibility	By ensuring the housing stock is accessible to individuals of all physical and mental abilities, across all stages of life
Environmental/Climate Adaptation	By improving the efficiency and resiliency of new and existing housing
Health and Safety	By ensuring all housing adheres to healthy/safe living standards

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GUIDING PRINCIPLES

- Our regional housing efforts should advance _____ .

| **Deconcentrating Poverty** | By creating lower cost housing options in areas where they are limited or do not exist currently |

| **Neighborhood Revitalization** | By investing in communities that have experienced disinvestment |

| **Access to Opportunity** | By building up & expanding access to neighborhoods of opportunity, including those in proximity to: |

- Job centers
- Transportation
- Good schools
- A healthy environment (e.g. low pollution, access to green space)
- Strong retail amenities, like healthy grocery stores

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Access to opportunity

*When people have access to the essential foundations of opportunity, including affordable housing, jobs, good schools and transit, then **everyone has a chance to succeed – no matter where they're starting from***.

Is there anything critical missing from this list?

- Job centers
- Transportation
- Good schools
- A healthy environment (e.g. low pollution, access to green space)
- Strong retail amenities, like healthy grocery stores

POLL: Among this list, what matters most for our housing efforts?

Go to menti.com and enter **40 63 85** to vote.

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Poll Results Round 1

What elements of access to opportunity are most important for our housing investments to emphasize?

- 1st — Transportation / mobility options
- 2nd — Good schools / childcare
- 3rd — Safe & healthy environment
- 4th — Job centers
- 5th — Access to healthcare / supportive services
- 6th — Broadband access
- 7th — Social capital and networks
- 8th — Strong retail amenities
- 9th — Wealth generation
- 10th — Entrepreneurship

Wealth generation, entrepreneurship, broadband access, social capital/networks, childcare, mobility, and supportive services added prior to voting due to large-group discussion.

👤 58

REGIONAL HOUSING STRATEGY

Poll Results Round 2

What elements of access to opportunity are most important for our housing investments to emphasize?

| Rank	Element
1st	Transportation / mobility options
2nd	Good schools / childcare
3rd	Safe & healthy environment
4th	Broadband access
5th	Job centers
6th	Social capital and networks
7th	Access to healthcare / supportive services
8th	Strong retail amenities
9th	Wealth generation
10th	Entrepreneurship

Wealth generation, entrepreneurship, broadband access, social capital/networks, childcare, mobility, and supportive services added prior to voting due to large-group discussion.

Mentimeter

52
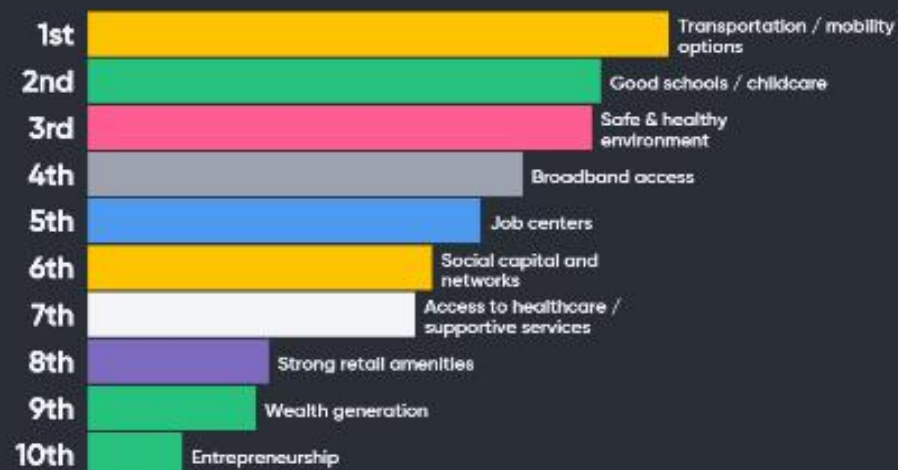
REGIONAL HOUSING STRATEGY

GUIDING PRINCIPLES

- Our regional housing efforts should advance _____ .

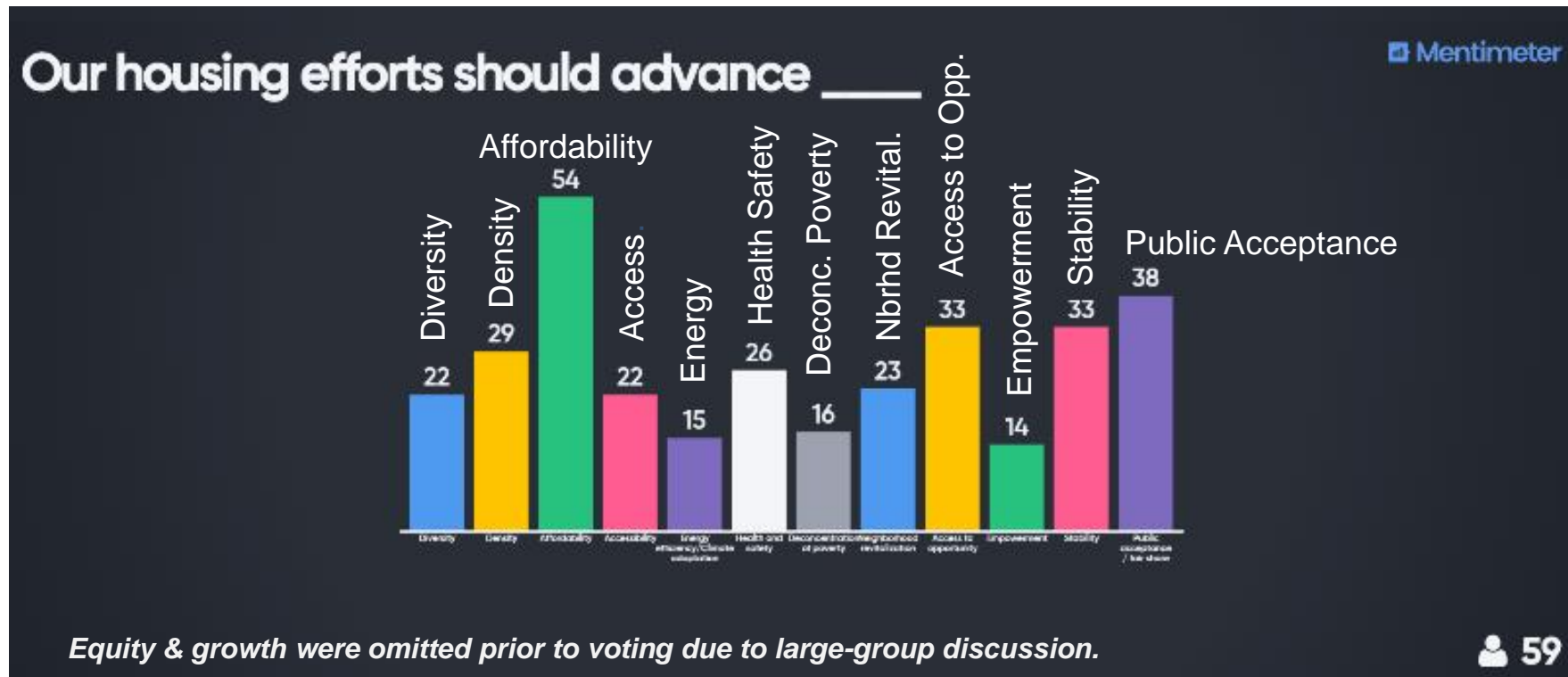| Others?	Others?	Others?
Equity	Diversity	Neighborhood Revitalization
Growth	Density	Deconcentrating Poverty
	Affordability	Accessing Opportunity
	Accessibility	
	Energy Efficiency/Climate Adaptation	
	Health and Safety	

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Our top 6

POLL: Among all the guiding principles, which are most important for our housing efforts to advance?

POLL: Can anyone not accept these as our top 6 guiding principles?

Go to menti.com and enter **40 63 85** to vote.

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Poll Results

Our housing efforts should advance ____

Diversity 22 | Density 29 | Affordability 54 | Access 22 | Energy 15 | Health Safety 26 | Deconc. Poverty 16 | Nbrhd Revital. 23 | Access to Opp. 33 | Empowerment 14 | Stability 33 | Public Acceptance 38

Equity & growth were omitted prior to voting due to large-group discussion.

👤 59

BREAK

We will reconvene in 10 minutes.

When we come back, we will have small group discussions to:

1. Build knowledge-base around actions the region could take.

2. Foster dialogue between members of the group who are working on similar issues, but may not be working together.

3. Gather feedback on what it would take to right-size these actions to the region.

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HOUSING STRATEGY

Small-group discussions

What are we doing and what could we be doing as a region?

Goals for these discussions

1. Build knowledge-base around actions the region could take

2. Foster dialogue between members of the group who are working on similar issues, but may not be working together

3. Gather feedback on what it would take to right-size these actions to the region

REGIONAL
HOUSING STRATEGY

VISION

What will we achieve with this strategy?

GUIDING PRINCIPLES

How do we know our actions are fulfilling that vision?

REGIONWIDE STRATEGIES

SUBMARKET STRATEGIES

What process will we follow to address housing needs and build our capacity for the future?

ACTIONS TO ADVANCE REGIONWIDE STRATEGIES

ACTIONS TO ADVANCE SUBMARKET STRATEGIES

What steps will we take to implement that process?

METRICS TO TRACK PROGRESS

How will we evaluate our progress towards our vision?

Upcoming activities

What's next?

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HOUSING STRATEGY

Upcoming activities

Our second joint strategy session will be on April 8th, 2020 at MORPC

Between now and our next meeting we will…

- Host next **Speaker Series*** event on the topic of evictions.

- Prepare **best practice case studies** on innovative financing for housing and community development.

- Conduct **regional workshops*** and targeted **focus groups**.

- Host a **data webinar** to introduce the regional housing submarkets that have been identified.

- Draft a future-state **housing investment allocation portfolio** for consideration.

Logistics will be circulated to this group after today's meeting.

REGIONAL
HOUSING STRATEGY

Thank you!

Thank you for participating. If you have additional comments or questions, please contact Jen Noll at jnoll@morpc.org.