

Regional Housing Needs Assessment Outline – *DRAFT*

Key topics identified in work plan:

- Providing housing supply and land use capacity that support the VISION 2050 Regional Growth Strategy
- Preserving market-rate and subsidized affordable housing
- Expanding market-rate and subsidized affordable housing
- Providing housing options that support equitable development in centers and near high-capacity transit
- Improving regional and subregional jobs-housing balance
- Expanding moderate-density (“missing middle”) housing options
- Reducing and mitigating residential displacement

Text = Addition/change based on LUTAC + Housing feedback

Text = Addition/change to support key topics

[Text] = Exploratory research. Unclear if question can be answered. May be supplementary materials to RHNA

→ = Geographies

1) Introduction

2) Background and Policy Context

- a) Housing in the Growth Management Act (GMA)
- b) Housing in VISION 2050

3) Community Profile

- a) Population and household characteristics
 - i) Growth Rate – Population
→Geography: Region
 - ii) RGS –Population
→Geography: County, Regional Geographies
- b) Demographics
 - i) Race/Ethnicity
→Geography: Region, County
 - ii) Special Populations
→Geography: Region, County
- c) Household Characteristics
 - i) Tenure
 - (1) Housing Tenure
→Geography: Region, Subarea

- (2) Renter Occupied Housing
 - Geography: Region, Subarea
- (3) Housing Tenure by R/E
 - Geography: Region, Subarea
- ii) Income – **annual and distribution**
 - (1) Median HH Income
 - Geography: Region, County
 - (2) Median HH Income by R/E
 - Geography: Region, County
- iii) Household Size and Formation – **average and distribution**
 - (1) Household Size
 - Geography: Region, County
 - (2) Household Type
 - Geography: Region, County
- iv) Generational Needs and Preferences
 - (1) Econometric Forecast (+pull info from background paper on pref)
 - Geography: Region
- v) Cost Burden
 - (1) Cost Burden Renters
 - Geography: Region, Subareas, **County**
 - (2) Cost Burdened Renters by R/E
 - Geography: Region, **County**
 - (3) LI Cost Burdened Renters
 - Geography: Region, Subareas, **County**
- vi) Displacement
 - (1) Displacement Risk Analysis
 - (2) *More to come – Staff exploring other methodologies for assessing residential displacement*
- d) Workforce Characteristics
 - i) Wages
 - (1) Wages for common occupations/fastest growing sectors
 - Geography: Region, County (confirming Kitsap)
 - (2) Housing affordable to common occupations
 - Geography: Region, County
 - ii) Jobs-Housing Balance
 - (1) Jobs-Housing ratios
 - Geography: Region, County, Regional Geographies
 - (2) Home location of local workforce
 - Geography: County, Subarea

- iii) Employment Projections
 - (1) Growth Rate – Employ
 - Geography: Region
 - (2) Annual Change in Jobs v Housing
 - Geography: Region
 - (3) RGS – Employment
 - Geography: County, Regional Geographies
- 4) Housing Inventory
 - a) Housing Units
 - i) Units by Type
 - (1) Housing Units by Type
 - Geography: Region, County
 - (2) Units in Structure/**Size of MF Developments**
 - Geography: Region, County
 - (3) Age of Structure
 - Geography: Region, County
 - ii) Vacancy Rates
 - (1) Vacancy
 - Geography: Region, County
 - (2) For Sale Inventory
 - Geography: Region, County
 - b) Quality and Condition of Housing
 - (1) Overcrowding (39)
 - Geography: Region, County
 - (2) Housing Condition (40, 41)
 - Geography: Region, County
 - c) Cost of Housing
 - (1) Median Home Price
 - (a) Median Home Value – **median and distribution**
 - Geography: Region, County, Zip Code
 - (b) Median Sales Prices by Unit Type
 - Geography: Region, County
 - (c) Median Sales Price by Housing Type
 - Geography: Region, County
 - (d) Homes Sold by Unit Type
 - Geography: Region, County
 - (2) Median Rent
 - (a) Median Rent—**median and distribution**
 - Geography: Region, County,
 - (b) Average Rent – Market Rate Multifamily (MR MF)

- Geography: Region, County, Subareas, Regional Growth Centers, HCT Station Areas
- (c) MR MF Affordable to 50/80/100% AMI
 - Geography: Region, County, Subareas, Regional Growth Centers, HCT Station Areas
- (3) Home Ownership
 - (a) Housing Affordability Index (HAI)
 - Geography: County
 - (b) HAI – First Time Buyer
 - Geography: County
- (4) Housing and Transportation (H+T)
 - (a) Housing Costs as % of Income
 - Geography: Census Tract
 - (b) H+T Costs as % of Income
 - Geography: Census Tract
- (5) Pressure on Market Rate Rents
 - (a) Current rental supply across AMI categories
 - (b) % change in average rents since 2010
 - Geography: Region, County, Subareas, Regional Growth Centers, HCT Station Areas
- (6) [NOAH Preservation in Higher Demand Markets]
- (7) [SF in Proximity to MF Effect on Property Values]
- (8) Housing Availability
 - Geography: Region, County
- (9) Subsidized and special housing types
 - (a) Subsidized Housing Units (n/a)
 - Geography: Region, County, Subareas, Regional Growth Centers, HCT station areas
 - (b) Project Types & Expirations
 - Geography: Region, County, Subareas
 - (c) Special Needs Housing (group homes, shelters, etc.)
 - Geography: Region, County
- d) Housing production
 - i) Construction Trends – Heat map(s) where applicable
 - (1) Housing Production
 - Geography: Region, County, Regional Geographies
 - (2) SF Housing Growth
 - Geography: Region, County, Regional Geographies
 - (3) MF Housing Growth
 - Geography: Region, County, Regional Geographies

- (4) Housing Permits in RGCs
 - Geography: Regional Growth Centers
- (5) Housing Permits in HCTs
 - Geography: HCT Station Areas
- e) Missing Middle
 - i) Overview of Stock
 - (1) Age
 - Geography: Region, County, Subareas
 - (2) Tenure
 - Geography: Region, County, Subareas
 - (3) Zoning
 - Geography: Region, County, Regional Geographies
 - (4) Distribution
 - Geography: Region, County
 - ii) Access to Neighborhoods
 - (1) Location of SF neighborhoods in relation to racial diversity index
 - Geography: Census Tract
- 5) Housing Need
 - a) Housing Production v Population Growth
 - Geography: Region, County, Regional Geographies
 - b) Annual v Avrg Housing Production (37)*
 - Geography: Region, County, Regional Geographies
 - c) Future Supply –Translate RGS pop to housing units
 - Geography: Region, County, Regional Geographies
 - d) Capacity
 - Geography: Region, County, Regional Geographies
 - e) *More to come – forthcoming HNA methodology proposal/next LUTAC meeting in July*