

Housing Incentives & Tools Survey Report



February 2020



Puget Sound Regional Council

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Introduction

As an early [VISION 2050](#) implementation effort, PSRC fielded a survey to local jurisdictions in summer 2019 to learn how they use regulatory incentives and tools to promote housing development and affordability. The survey builds on the work of a 2009 housing survey and will inform future regional and local housing work.

Housing affordability continues to be a major challenge for the region.¹ The housing market has experienced great highs and lows that have benefitted some and created and exacerbated hardship and inequalities for others. Following the precipitous drop in housing prices and foreclosures of the recession, the region's economic upswing and strong job growth in the 2010s have fueled dramatic increases in rents and home prices. Housing costs are a greater burden for many households today than a decade ago, leaving less for other basic needs and amenities. Renters, and renters of color in particular, face a considerable shortage of affordable housing opportunities.

Local governments play a critical role in housing production and affordability. Local governments possess regulatory control over land use and development. They are key players, both individually and in cooperation with other housing interests, in stimulating various types of development activity. There are numerous tools and strategies available to local governments to encourage housing choices and promote affordable housing. Many of these tools can be applied in a manner that is tailored to and respectful of local market conditions, community characteristics, and the vision for growth embodied in local comprehensive plans. Over the past decade, local efforts have yielded new resources, promoted best practices, established community-based housing strategies, and coordinated efforts across multiple jurisdictions. However, in many cases, these tools have been unable to keep up with housing need as rents and home values skyrocket.

Key Findings

Local governments are doing more to promote housing development

Over two-thirds of local jurisdictions surveyed (50) have put in place at least one incentive to promote housing development and/or affordability. Of the cities that completed the survey, 42 have three or more housing incentives in place and 30 have adopted density bonuses. Of the jurisdictions that indicated they have no incentives in use, the majority are small cities that do not have current or planned high-capacity transit. The vast majority – 93% – of jurisdictions surveyed have zoning that allows housing types other than detached single-family.

¹ See the 2018 Housing Background Paper for more information on trends in housing and housing affordability in the region, available online at https://www.psrc.org/sites/default/files/vision_2050_housing_background_paper.pdf.

Implementation of housing tools is uneven

The survey demonstrated that local abilities to adopt tools to address housing affordability varies significantly among jurisdictions and there is inconsistency and lack of coordination among local affordable housing strategies. Critical areas and market factors can also limit where and how market-based tools and incentives are adopted.

Mandatory, locally calibrated tools are most effective

All tools surveyed have had success to some degree. Responses from the survey underscore that housing tools and incentives need to be properly calibrated for the local market to be effective incentives for the desired type of development and level of affordability. Respondents of cities with mandatory tools consistently said that they are more effective in creating new, more deeply subsidized affordable housing than voluntary tools.

Many cities are planning to grow up

One-third of local jurisdictions surveyed (24) have zoning that allows multi-family high rises – residential buildings with seven floors or more. Nearly three-quarters of the region’s Metro and Core cities surveyed – places planning to accommodate a large portion of future population growth – allow high-rise development. Zoning for high rises is often targeted to regional growth centers or local subareas, which shows that many local jurisdictions are undertaking efforts to concentrate growth in areas near transit. This is a notable increase from 2009 when less than 20% of jurisdictions surveyed had zoning that allowed high rise development.

Use of the Multifamily Property Tax Exemption has grown over the past decade

Over one-third of jurisdictions surveyed (26) have adopted Multifamily Tax Exemption (MFTE). This is the largest increase in adoption of any of the surveyed incentives – only 10 of the surveyed jurisdictions used MFTE in 2009. MFTE has resulted in the most units of the incentives surveyed among respondents.

Displacement is an increasingly important part of local housing conversations

The use of displacement mitigation tools is growing, with nearly one in three jurisdictions surveyed now having one or more displacement mitigation tools in place, up from 12% in the 2009 survey. Many communities identified having continuing questions and needing more technical assistance to better address current and future displacement risk.

2019 Housing Incentives and Tools Survey

The survey was completed by 73 local jurisdictions in the central Puget Sound either directly, or in coordination with A Regional Coalition for Housing (ARCH) or PSRC staff. The survey seeks to answer the following questions:

- What incentives, tools, policies, and housing types are allowed by local governments? What tools are local governments tailoring to specific locations or populations?
- How much new housing is being created as a result of the use of incentives, tools, and policies?
- What do local governments see as successful practices, challenges, and emerging opportunities for new housing strategies?

The results and findings of the 2019 Housing Incentives and Tools Survey establish a baseline of local policy implementation. This report aims to highlight strengths and gaps in housing tools and incentives to meet local and regional goals and helps to inform forthcoming housing work including a regional housing strategy. This report can also help to make regional and local work more effective by highlighting opportunities to refine, combine, or explore new tools and potential focus areas. This report focuses specifically on local government tools, but housing issues are also addressed through state and federal programs, financial policies, and the work of non-profits and for-profit housing developers.

Survey Methodology

The Housing Incentives and Tools Survey continues efforts carried out in 2009 as part of PSRC’s Housing Innovations Program (HIP). The 2009 survey allowed PSRC and its regional partners to better understand the housing tools in use, the effectiveness of different tools, and local needs for technical assistance. Regional stakeholders expressed interest in a new survey to understand how housing incentives and tools are used today.

A new survey was developed by PSRC staff in consultation with regional housing partners and pilot-tested with six cities in spring 2019. The survey was refined and sent out to all cities and towns, counties, and Tribal Nations in the central Puget Sound region from July 1 to September 30. The survey could be completed online, by email, or by paper submission. A total of 73 responses were collected.

The 2019 survey consisted of two parts:²

- Part I asked respondents to indicate the incentives and housing types allowed in their jurisdiction, whether the tools target specific areas or populations, and the number of units created from the housing tools. The housing incentives section asked about nine common policies and programs, such as inclusionary zoning, Multifamily Property Tax Exemption, and parking reductions. Questions on housing types looked at 13 permitted housing types, such as duplexes/triplexes, high-rise multifamily, mobile home parks, and accessory dwelling units. Respondents were asked about the number of units or projects constructed using different tools, in-lieu fees collected, and whether tools were targeted to specific locations such as a regional center — or to populations such as seniors or larger households.

² See Appendix A for a copy of the survey instrument

- Part II included questions regarding displacement mitigation, inclusionary zoning, below market-rate homeownership, and open-ended questions to discuss successes, challenges, tools under consideration, and other thoughts of respondents.

While the 2019 survey builds on the 2009 survey, the questions were updated to reflect the current state of the housing market and best practices in local housing planning. As such, the responses from both surveys cannot always be directly compared.

PSRC obtained information for 73 jurisdictions – 86% of the cities, town, and counties in the central Puget Sound (Figure 1). PSRC received 63 responses directly from local staff. ARCH staff provided responses for seven of its King County member jurisdictions. PSRC staff used information from the King County Housing Development Consortium (HDC) [online policy tracking tool](#) to obtain information for three additional jurisdictions. The completeness of survey responses varied among jurisdictions, but the responses provided significant information to evaluate in this report. The data from HDC helped to fill in gaps but did not provide the same level of detail and insight as responses from local city staff. It is important to note that responses to the survey were self-reported and do not reflect a statistical sampling of data.

Each of the four counties –King, Kitsap, Pierce, and Snohomish— submitted responses that cover unincorporated areas. King County staff noted their responses apply only to urban unincorporated areas in the county. While other unincorporated areas may be included in responses for other counties, some housing types and incentives surveyed may not be applicable to rural or resource areas.

Limits to the Survey

The survey helps to provide a baseline of local housing policy implementation. However, there are limitations to the survey data. Recognizing the limitations helps to identify future data needs and policy questions.

The survey focused on tools in use by local jurisdictions. It did not ask for the specific geographic constraints of housing types and incentives within jurisdictions. Respondents were asked to indicate if incentives and housing types are allowed in their jurisdiction and/or targeted to Regional Centers, local subareas, or other locations, but there were no follow up questions to determine the specific location, nor questions to quantify how much land is zoned for a certain housing type. As such, a jurisdiction may allow a specific incentive or housing type, but the survey does not capture how widespread it is. The existing and forthcoming buildable land analyses and housing assessments can help to answer questions regarding scale and capacity.

Figure 1 – 2019 Survey Participation

King (39)		
Alcona*	Redmond	Milton**
Auburn**	Renton	Orting
Beaux Arts	Sammamish	Pacific**
Bellevue	SeaTac	Puyallup
Black Diamond	Seattle	Roy
Bothell**	Shoreline	Ruston
Burien	Skykomish*	Steilacoom
Clyde Hill	Snoqualmie	Sumner
Covington	Tukwila	Tacoma
Des Moines	Uninc. King County	Uninc. Pierce County
Duvall	Woodinville	Wilkeson
Enumclaw	Yarrow Point	
Federal Way		Snohomish (15)
Hunts Point	Kitsap (5)	Arlington
Issaquah	Bainbridge Island	Bothell**
Kenmore	Bremerton	Brier
Kent	Port Orchard	Darrington
Kirkland	Poulsbo	Edmonds
Lake Forest Park	Uninc. Kitsap County	Everett
Maple Valley*		Granite Falls
Medina	Pierce (19)	Lynnwood
Mercer Island	Auburn**	Marysville
Milton**	Bonney Lake	Mountlake Terrace
Newcastle	Carbonado	Mukilteo
Normandy Park	Fife	Snohomish
North Bend	Fircrest	Sultan
Pacific**	Gig Harbor	Uninc. Snohomish County
	Lakewood	Woodway

* HDC Response

**City part of two counties

Data Analysis

Local governments are doing more to promote housing development

Overall, 50 of the local jurisdictions surveyed (68%) have at least one incentive in place to promote housing production and/or affordability. Forty-two jurisdictions have three or more incentives in place.

Sixty-eight of the local jurisdictions surveyed—93%—have zoning for at least one housing type other than detached single-family. The majority of jurisdictions surveyed have zoning that allows for accessory dwelling units (85%), mixed-used development (78%), duplexes/triplexes (77%), low-rise multifamily (77%), zero lot line/townhomes (75%), mid-rise multifamily (58%), mobile home parts (56%), and cluster development (52%), showing that zoning codes allow for a wide range of housing types in most communities. While the survey did not ask jurisdictions about the amount of land area that these housing types are allowed in, past PSRC data shows that single-family zoning remains the dominant zoning type throughout the urban area.

Of the 13 housing types included in the 2019 survey, accessory dwelling units (both attached and detached) and mixed-use buildings are the most common zoned housing types among survey responses (Figure 2).

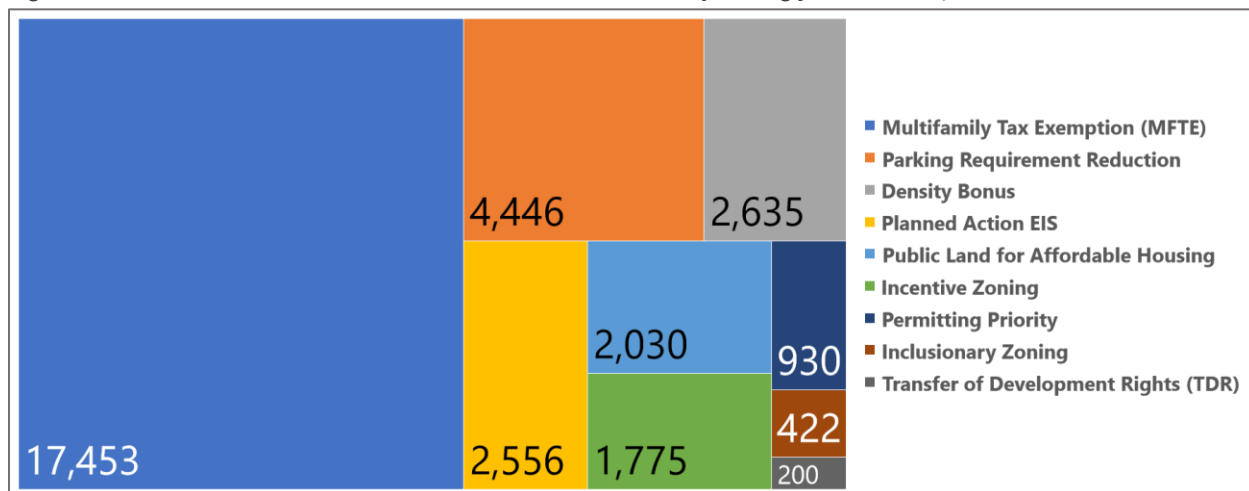
The most common adopted incentives are [density bonuses](#), [parking requirement reductions](#), and [Multifamily Property Tax Exemption \(MFTE\)](#) (Figure 2). MFTE is also the incentive that has resulted in the most housing production reported by respondents, with more than 17,000 new units built among 26 jurisdictions in the region since 2009 (Figure 3). This is more than the reported number of units produced from all other incentives combined. Twenty-three local jurisdictions indicated they have no incentives in place. Of those, 19 have populations under 10,000 and have no existing or planned high-capacity transit.

Figure 2: 2019 Ranking of Housing Types and Incentives Surveyed

Responses n=73	Housing Type
62	Attached Accessory Dwelling Unit
60	Detached Accessory Dwelling Unit
57	Mixed-Use
56	Duplexes/Triplexes
56	Low-Rise Multifamily (1-3 stories)
55	Zero Lot Line/Townhomes
42	Mid-Rise Multifamily 4-6 stories)
41	Mobile Home Parks
38	Cluster Development
36	Cottage Housing
31	Planned Unit Development
24	High-Rise Multifamily (7+ stories)
17	Micro Units

Responses n=73	Incentive
30	Density Bonus
29	Parking Requirement Reduction
26	Multifamily Tax Exemption (MFTE)
20	Planned Action EIS
17	Incentive Zoning
15	Public Land for Affordable Housing
15	Transfer of Development Rights (TDR)
14	Inclusionary Zoning
13	Permitting Priority

Figure 3: Number of units built as a result of incentives in responding jurisdictions, 2009-2019



Note: Unit count is an estimate and may not capture all new units and/or double count units that use multiple incentives.

Comparing findings from the 2019 and 2009 surveys shows how local jurisdictions' have adopted tools over the past decade (Figure 4), with five of the 13 surveyed housing types and two of the nine surveyed incentives showing an increase in adoption at the local level. Some housing types and incentives that were common in 2009 remain popular today, while others have been more widely adopted over the past decade. It is important to note that 58 responses were collected in 2009, compared to 73 in 2019. A few housing types are described below in more depth.

Figure 4: Change in housing type zoning and incentives since 2009

Housing Type	Trend	Housing Incentive	Trend
Cottage housing	↑	Multifamily Tax Exemption	↑
Mixed-use	↑	Transfer of development rights	↑
Multi-family - high-rise	↑		
Townhomes/Zero lot line	↑		

↑ Increase in percentage of jurisdictions allowing incentive or zoning for type by more than 10%

Accessory Dwelling Units

Of the 13 housing types included in the survey, accessory dwelling units (ADUs) are the most commonly allowed by local governments, consistent with state law³ requiring ADUs in most cities. Twenty-seven cities allow ADUs citywide, three times the rate of any other housing type surveyed. ADUs were the top tool in active use in the 2009 survey as well, although there was no distinction between attached and detached ADUs in that survey.

Duplexes/Triplexes

Fifty-six jurisdictions surveyed (77%) have zoning that allows for duplexes and/or triplexes in some portion of their zoning, the third most common housing type on the survey. Duplexes and triplexes are most common in large jurisdictions – jurisdictions with populations greater than

³ [RCW 43.63A.215](#) and [RCW 36.70A.400](#)

100,000 – and jurisdictions with median incomes ranging from \$60,000 - \$110,000. If a local jurisdiction allows any housing type other than a detached single-family home in a predominantly single-family neighborhood, duplexes and triplexes are most likely. Nearly all of the cities surveyed (42 out of 44) with populations above 10,000 have zoning for duplexes/triplexes. Meanwhile, they are least common in jurisdictions with higher median incomes and home prices. Just one jurisdiction out of seven with a median home price over \$1 million allows duplexes/triplexes. Duplexes or triplexes were not included on the 2009 survey.

Microunits

Microunits are the least common housing type included on the survey, with 17 (23%) jurisdictions zoning for them. However, this is an increase from 14% in the 2009 survey, when just eight jurisdictions indicated “small/single room multifamily” zoning was in use. They are most often allowed in larger cities that are working to create new housing options. The majority of Metro Cities (4 of 5) and cities with populations over 50,000 (5 of 7) that completed the survey have zoning that allows for microunits. Microunits tend to be zoned in Regional Growth Centers and local subareas, which shows many cities are targeting microunits to areas with access to jobs and transit.

Implementation of housing tools is uneven

The survey demonstrated that local governments have different abilities to adopt tools to address housing affordability. Since the 2009 survey, most local jurisdictions have increased zoning for housing besides detached single-family and offer more incentives to encourage production and affordability, but local variables, including size, staff capacity, and economic characteristics, factor into how many tools have been adopted. Figure 5 shows the number of incentives allowed by each local jurisdiction.

The survey found that, typically, jurisdictions with more tools in place have generated more new affordable units. On the whole, cities that have adopted or implemented additional housing incentives or types have developed more housing in both number of units and diversity of types and affordability. This underscores the need for multiple tools to promote housing development at the local level. While the survey data doesn't cover the use of individual tools, this reaffirms the concept that successful affordable housing projects often layer multiple tools to make the project work.

Smaller jurisdictions, particularly those with populations under 10,000 and/or higher median home value, have adopted a much more limited set of tools (Figure 6). Many of these jurisdictions noted in survey responses that they cannot support development beyond single-family housing due to a lack of infrastructure or environmental restrictions. This raises questions of how small and higher-cost communities can effectively contribute to regional housing solutions, especially for cities in proximity to job centers and communities with future high-capacity transit stations.

Figure 5: Surveyed incentives by jurisdiction

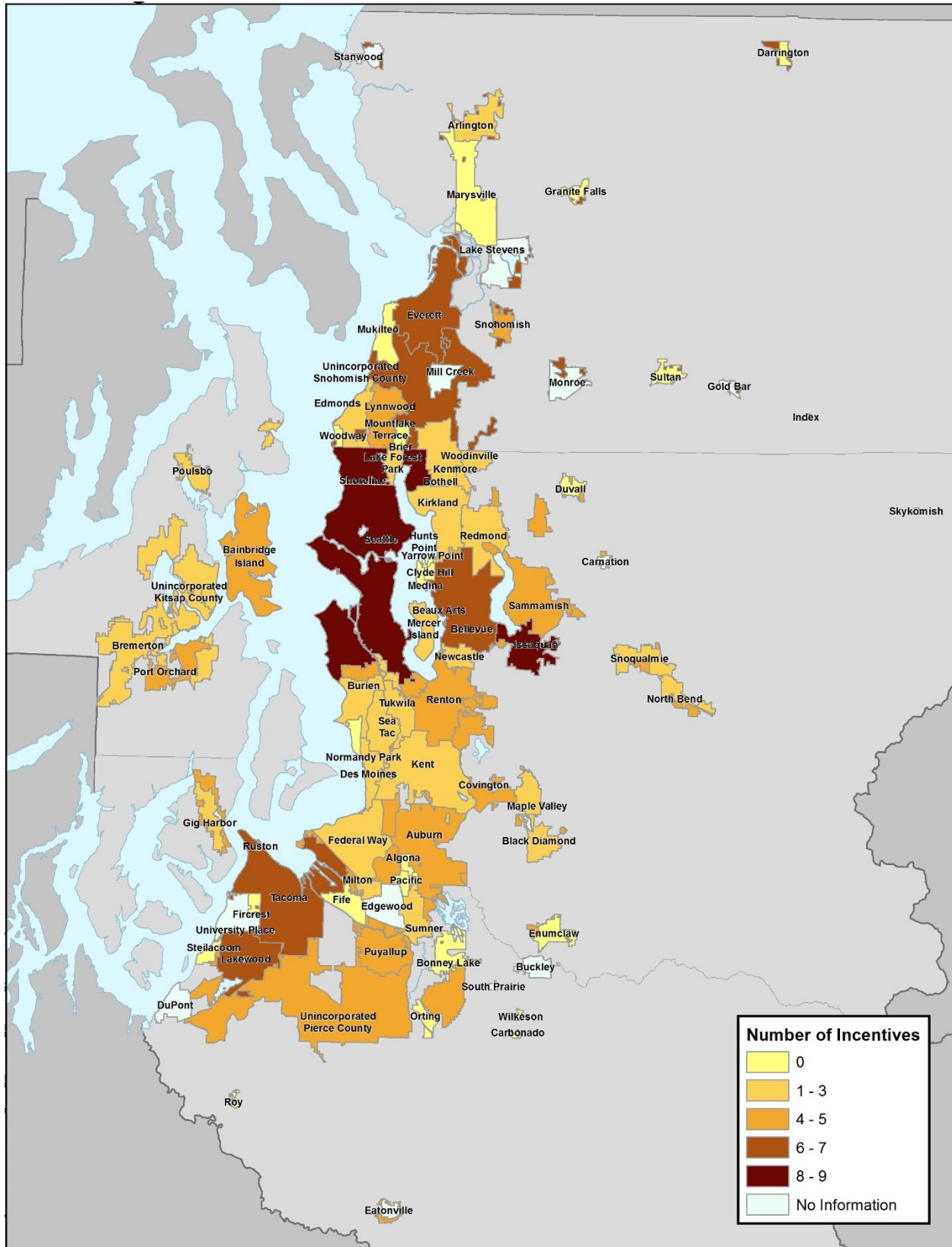
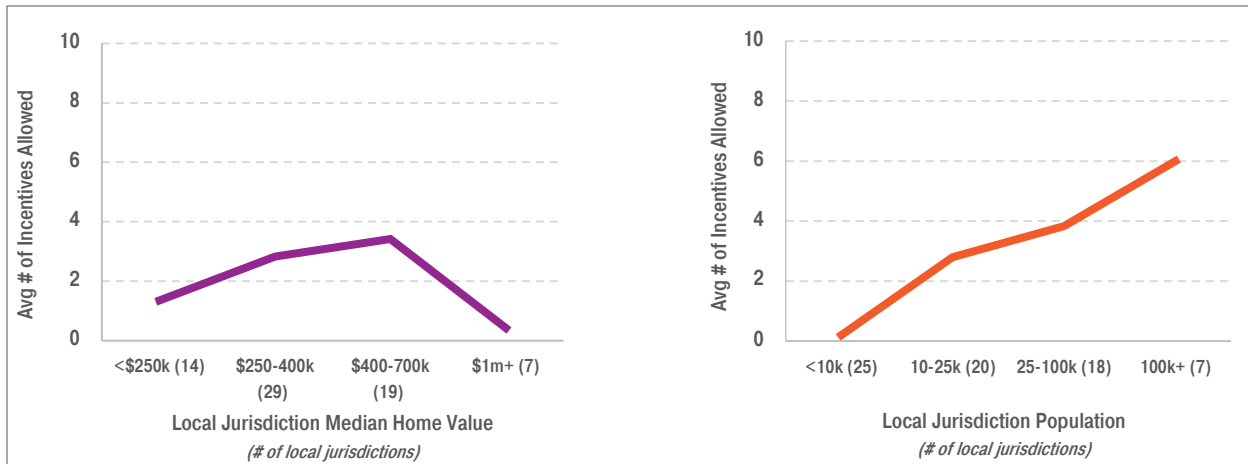


Figure 6: Average number of incentives allowed by local jurisdiction population, median home value



More complex housing tools, such as inclusionary zoning, fee in-lieu programs, and local housing levies, can be very effective in developing and preserving affordable units but may be out of reach of jurisdictions with limited staff capacity. Of those that completed the survey, the majority of the jurisdictions with inclusionary housing programs are members of A Regional Coalition for Housing (ARCH). ARCH staff provide technical support to jurisdictions and have the expertise to develop inclusionary zoning programs tailored to local circumstances. Several cities noted that ARCH staff were essential in developing suites of local incentives that developers can combine to make development feasible while still promoting below market-rate housing. Subregional coalition building may be critical to help scale up housing solutions for jurisdictions that do not have local resources or expertise.

Based on the responses from the survey, there is no one single and consistent affordable housing strategy used by local governments. While this may be understandable given the differences in local market conditions and capacity of local jurisdictions, a patchwork of housing tools and incentives across the region may limit broader regional goals to build and preserve more housing of various types and affordability levels.

Mandatory, locally calibrated tools are most effective

All tools surveyed have had success to some degree in the region. However, the level of success varies considerably according to local conditions. In the open-ended questions, several jurisdictions stated that density bonuses have been effective in promoting growth in workforce housing – housing affordable to households earning 60-80% area median income – while others noted that density bonuses are ineffective in their jurisdiction. This underscores that there is no universally

“ So far, we have had little in terms of production of affordable units through existing incentives programs. They were put in place at a time when the market was much weaker and were calibrated to be cautious.

-survey respondent

successful tool or incentive, and that the success of tools and incentives is often based on how and where they are developed and implemented.

Responses from the survey emphasize that housing tools and incentives need to be properly calibrated for the local market to be effective incentives for the type of development and level of affordability. Jurisdictions noted that many older incentives calibrated to past market conditions, particularly those adopted just after the Great Recession when housing development was at a near standstill, are no longer maximizing the public benefit – the number of affordable units and/or level of affordability – for the incentives provided to developers in the current housing market. At the same time, most jurisdictions lack the resources or expertise to regularly update and calibrate their housing toolkit.

While few jurisdictions have mandatory housing programs on the books, respondents with mandatory programs consistently said that they are most effective at leading to new housing. The survey demonstrated that the success of voluntary incentives, such as density bonuses, varies. Voluntary incentives tend to be most successful in stronger housing markets but are often overlooked in weaker markets as these incentives may not provide a sufficient financial incentive to support housing affordable at below market rates. However, mandatory tools present challenges for jurisdictions, including a real fear of driving away development by imposing too many requirements. One jurisdiction noted that they are hesitant to implement mandatory requirements due to concerns about the city taking a financial loss.

Several jurisdictions noted that many incentives are most effective when used together as this allows for costs to be lowered to a sufficient degree for development to be financially feasible. For example, many jurisdictions noted that density bonuses were most successful in generating more housing units when coupled with reduced parking requirements. This is especially true in areas where parking requirements may have previously been high. Respondents reported that other incentives, such as open space reductions and impact and permit fee waivers, also work better when coupled with additional incentives.

Underpinning this analysis is the challenge of tracking the effectiveness of individual and combined incentives to meet local goals. Most of the market-based incentives included in the survey have few or no reporting requirements. Jurisdictions, particularly smaller cities and towns with limited staff capacity, were not able to provide data about the success of individual tools. Not having data regarding the success of tools makes it difficult for jurisdictions to know how to properly calibrate their toolkits to local conditions. As market conditions change and

“ [Our city] allows a 50% reduction to minimum parking requirements for downtown projects... Due to the high cost associated with structured parking, and the land constraints in our downtown area that discourage surface parking, this reduction has been an important catalyst to development. ”

-survey respondent

growth targets are updated, it will be increasingly important for local jurisdictions to have resources to assess local zoning and incentives to support future growth.

Many cities are planning to grow up

As the region plans for regional centers and the expansion of transit, many local jurisdictions are increasingly allowing for denser forms of housing and for high-rise developments. They are also placing a greater emphasis on zoning for housing types, such as ADUs, duplexes, triplexes, [townhomes](#), and [low-rise multi-family](#), that allow more middle- and high-density housing. Comparatively, a decade ago responses from the 2009 survey showed that many local jurisdictions were more focused on innovative single-family housing such as [cluster development](#), [planned unit developments](#) (PUDs) and [cottage housing](#).

Twenty-four jurisdictions surveyed—33% of those surveyed—have zoning for multifamily high-rise housing, which includes buildings with seven floors or more. While this is among the least common type of housing allowed of those included in the survey, this is a large increase from 2009, when just seven jurisdictions had zoning for high-rise buildings. Zoning for high-rises is most common in large cities. This type of zoning is adopted in all five Metro cities and 10 of 14 Core cities that completed the survey – places that are planning to accommodate a large share of future population growth. It is also most likely to be targeted to regional growth centers or local subareas, which shows that local jurisdictions are planning for growth near transit, which supports PSRC's [Regional Centers Framework](#) and [Growing Transit Communities Strategy](#).

Less clear from the survey is the actual rate at which middle- and high-density housing types are coming to market. Survey responses indicated that many jurisdictions' code updates are recent, and the time lag between zoning updates and units coming online means the construction of these housing types may be several years out in many cases.

Use of the Multifamily Tax Exemption has grown over the past decade

The number of cities that have adopted multifamily tax exemption (MFTE) has increased more than any other incentive since 2009. Twenty-six jurisdictions surveyed (36%) now have MFTE available in some form, while just 10 had it on the books in 2009, when the program was still new. MFTE has also contributed to the development of more new housing units than all other incentives combined, according to respondents.

Considerable flexibility is built into the MFTE program. It offers a limited-term property tax exemption that can stimulate production of market-rate housing and/or housing affordable to households earning 80% AMI, depending on how the jurisdiction decides to implement it and the length of the tax exemptions. When tuned to support housing at 80% AMI, it can support housing for a critically needed segment of the housing market, particularly as new market-rate rentals in urban places tend to rent for well above median rent. There are limitations in adopting MFTE—it is generally limited to cities with populations of 15,000 or more and the term of the tax

exemption often means that affordability requirements end after 12 years.⁴ The Washington State Legislature is working to understand the impacts of MFTE since it was first implemented and is considering changes to the program based on those findings.⁵

Given that close to one-third of the region’s households earn below 80% AMI, MFTE by itself will not meet the need for housing choices affordable to all residents. Several respondents noted MFTE alone is “icing on the cake” – not a large enough incentive to bring development to an area or produce units at below-market rates but is critical in helping to make a potential development a reality.

This survey focused on land use and market-based tools and incentives and did not fully address outside funding or other sources of subsidy. However, many respondents expressed interest in doing more for low-income households but are unsure about where to start and what can be accomplished given limited staff capacity and technical expertise, and tools available under state law. There appears to be general understanding of the options a local jurisdiction has to promote diversity of housing type but fewer tools for local governments to support the development and preservation of deeply subsidized housing affordable to low- and very-low income residents – some of the region’s most vulnerable and housing instable residents.

“ Below 60% AMI households need a subsidy. Households making 60% - 80% AMI can benefit from local government development incentives. ”

-survey respondent

Displacement is an increasingly important part of local housing conversations

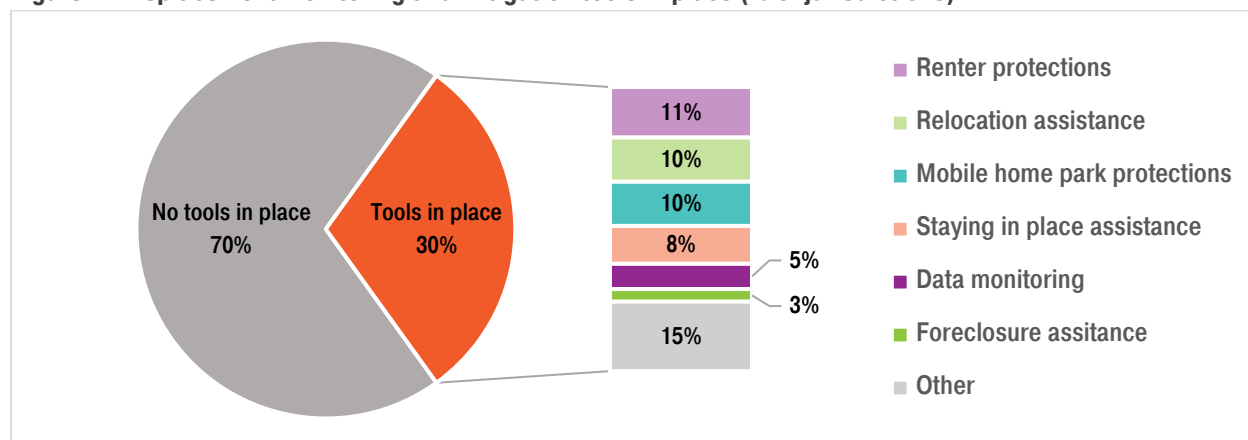
In the open-ended questions, the majority of jurisdictions noted that displacement is a concern in their communities. The use of displacement mitigation tools is growing with nearly one in three of the jurisdictions surveyed having one or more displacement mitigation tools in place (Figure 7). While some jurisdictions report having displacement mitigation tools in place, many communities have continuing questions and need for more technical assistance. Displacement tools can include relocation and other financial assistance, renter protections,⁶ mobility home protections, and local monitoring.

⁴ RCW 84.14.010

⁵ WA JLARC Report on Property Tax Exemption for Multifamily Housing in Urban Areas:
http://leg.wa.gov/jlarc/taxReports/2019/MFTE/p_a/default.html

⁶ Renter protections are strategies that seek to provide more resources for tenants, including increased requirements for notice of eviction or rent increase, eliminating no-cause evictions, or providing legal assistance to tenants. The survey did not include a definition of renter protections and was open to interpretation by respondents.

Figure 7: Displacement monitoring and mitigation tools in place (% of jurisdictions)



*Numbers exceed 100%—several jurisdictions have multiple displacement monitoring tools in place.

Of jurisdictions that reported displacement mitigation resources, many are using multiple approaches – half reported using more than one tool. These jurisdictions vary in size and location, underscoring that jurisdictions of various sizes and staff capacity can take steps to address displacement.

Protections for renters and mobile home parks and relocation assistance –both financial and logistical— were the most cited anti-displacement tools. Renters and mobile park protections, along with relocation assistance for mobile home residents, are enshrined in state law.⁷ Mobile home parks have been a particular area of focus, as they provide a form of naturally occurring affordable housing. Seven jurisdictions indicated having protections for mobile home parks, although responses in the open-ended questions reveal that these protections can lead to unintended issues such as deferred maintenance.

In the 2009 survey, displacement resources were reported near the bottom 10% of tools. Although a direct comparison is not possible, in 2019 a significantly greater proportion of respondents reported using displacement resources, many of which use more than one tool.

Responses to open-ended survey questions show that more jurisdictions are aware of displacement pressures in their communities than in 2009, but capacity to develop displacement tools and resources may be limited for many localities. Several cities noted that they rely on bigger or more targeted agencies—counties, nonprofits, or housing consortiums—to develop and/or administer displacement resources and programs. Some respondents noted they contribute funding to support the efforts of these agencies in lieu of local tools.

At the same time, others struggle to find the right combination of capacity, resources, and political will to successfully monitor and mitigate displacement. Creating awareness of the issue and identifying resources to effectively mitigate displacement are needed to support these jurisdictions.

⁷ See [Title 59 RCW](#).

Next Steps

The results and findings of the 2019 Housing Incentives and Tools Survey help to establish a baseline of local policy implementation, highlight strengths and gaps in housing tools and incentives to meet local and regional goals, and help to inform forthcoming housing work. Three key themes emerge for consideration as regional stakeholders move forward with housing work to implement VISION 2050.

Technical Assistance

Survey responses highlight the importance of staff capacity and expertise in developing and implementing effective housing tools and incentives. While the need for local intervention to create and preserve affordable housing has grown significantly over the past decade, most local jurisdictions' staff capacity and resources to address housing have not increased at the levels needed. Technical assistance can help to fill this gap. Subregional coalition building may be critical to help scale up housing solutions for jurisdictions that do not have local resources or expertise. The results of this housing survey can serve as a resource for local jurisdictions to learn more from one another.

As a regional convener and data resource, PSRC is in a unique role to provide regional technical assistance to support local jurisdictions to meet regional and local housing goals.

Assessment, Monitoring, and Reporting

Assessment, monitoring, and reporting on data and trends over time can help with the success of housing tools and incentives. This can include assessments of housing needs, monitoring implementation and outcomes, and reporting to elected officials and the public.

Survey responses underscore that ongoing reporting can be technically challenging and resource intensive. Coordinated reporting efforts, sharing of resources, and technical support can help to create long-term and consistent analysis to fully understand the opportunities and gaps in local and regional markets and to better align policies and regulations with desired outcomes. Shared monitoring systems, such as the forthcoming monitoring work of the King County Affordable Housing Committee, can help to coordinate and establish processes and leverage economies of scale. Other subregional coordination – both new and future – should include coordinated monitoring efforts.

Local Plans

VISION 2050 sets a vision for housing development and preservation for all residents over the next 30 years and includes an action to complete a regional housing strategy. Understanding tools that have already been adopted can help inform this effort. Further, the findings of this survey can help inform the work of local governments as they update their comprehensive plans and development regulations.

Data Needs

PSRC heard from partners and stakeholders that additional data will help to better understand the current state of local housing policy implementation in order to better coordinate and implement housing strategies.

While the survey captures some of the incentives and housing types allowed at the local level, collecting data about the specific locations where they are allowed or zoned will help to better evaluate the scale of incentives and types. Additionally, having a better understanding of local jurisdictions' housing capacity throughout the region makes it easier to plan for and build housing that meets the need of current and future residents. It is especially important to have more granular data of housing in transit station areas, which are expected to accommodate a large share of population growth. Understanding demographic factors – including age, income, and race – and how housing needs are impacted by them is also important to consider.

The survey addresses whether jurisdictions have displacement mitigation resources in place. More discussion and data about how these resources are working can help other jurisdictions determine how to address displacement mitigation themselves.

The existing and forthcoming buildable land analyses and regional and local housing assessments can help to answer many of these questions and to inform the 2023/2024 local comprehensive plan updates.

Appendices

The appendices are available on the PSRC website through the following links:

- [Appendix A – Survey Instrument](#)
- [Appendix B – Summary of 2019 Survey Responses](#)
- [Appendix C – Summary of 2009 Survey Responses](#)
- [Appendix D – 2019 Survey Responses](#)