

# Housing Plans - Assessing Your Community's Housing Needs and Building Plans



## MHP Massachusetts Housing Institute

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Town of Arlington

June 14, 2016

# Exercise #1 – Group Report Outs

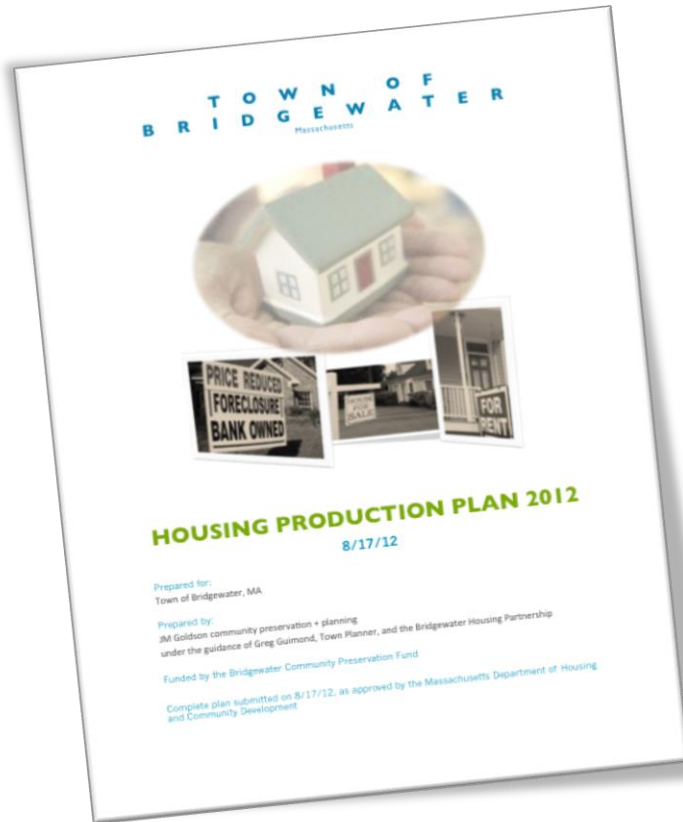
- Why did the members of your group choose to attend this session?
- What is their challenge?
- What kind of help do they need?
- How are your group member's needs and challenges similar and different from each other?

# Why Create a Housing Plan?

- More effectively achieve goals
- Understand housing needs
- Reach agreement on policies
- Establish commitment to housing goals
- Create do-able strategies
- Guide the type and location of development
- Strengthen community and regional partnerships
- Foster leadership, coordination, and oversight



# Components of a Good Plan

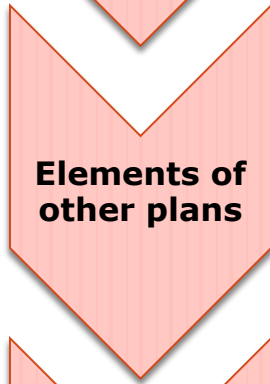


- Guided by community values and big picture thinking
- Builds on other local and regional plans
- Clear data-driven analysis of key issues
- Readable, visual, and informative
- Identifies realistic strategies and how to accomplish them
- Helps use local resources wisely
- Brings community together through fair and inclusive engagement

# Universe of Housing Plan Types



- Housing Needs Assessment
- Housing Plan
- Housing Production Plans



- Master Plan
- Community Preservation Plan
- Economic Development Plan
- Area Plan (e.g. neighborhood plan)



- Housing Trust Action Plan
- Consolidated Plan (entitlement communities)
- Analysis of Impediments to Fair Housing Choice (HOME recipients)

# Plans Primarily About Housing

## Housing Needs Assessment (Local Study)

- Demographic Characteristics & Trends
- Housing Supply Characteristics & Trends
- Key Housing Needs: Findings & Conclusions

## Housing Plan (Local Plan)

- Same as above +:
  - Development Constraints & Limitations
  - Implementation Capacity & Resources
  - Housing Goals & Strategies

## Housing Production Plan (State Recognized Regulatory Tool)

- Same as above +:
  - Prepared in accordance with state regulations and guidelines
  - Describes how the community plans to produce affordable units to obtain certification by the state
  - With a certified plan, ZBA denials of a Comprehensive Permit will be upheld by Housing Appeals Committee if not consistent with local needs.

# HPP Certification Explained

For example, the town next door. . .

Has 5,000 year round housing units so it needs a total of 500 units to be counted on the SHI to meet the 10% goal under MGL 40B.

Adopts and the state approves a Housing Production Plan.

Approves a housing development for 25 units that will be counted on the Subsidized Housing Inventory. (25 = 0.5% of total year round units)

The Town earns "certification" by the state and enters safe harbor for one year.

# Rough Timeline & Cost of Housing Plan



4-10 months total

- 1-3 months:
  - Needs Assessments
  - Development Constraints Analysis
- 1-3 months: Community Engagement
- 1-2 months: Draft Plan & Public Review
- 1-2 months: Finalize Plan & Adopt

Typical Cost Range: \$15K-\$25k



# Our Tips for an RFP

Don't be too prescriptive regarding scope of work.  
Ask for recommended scope of work.

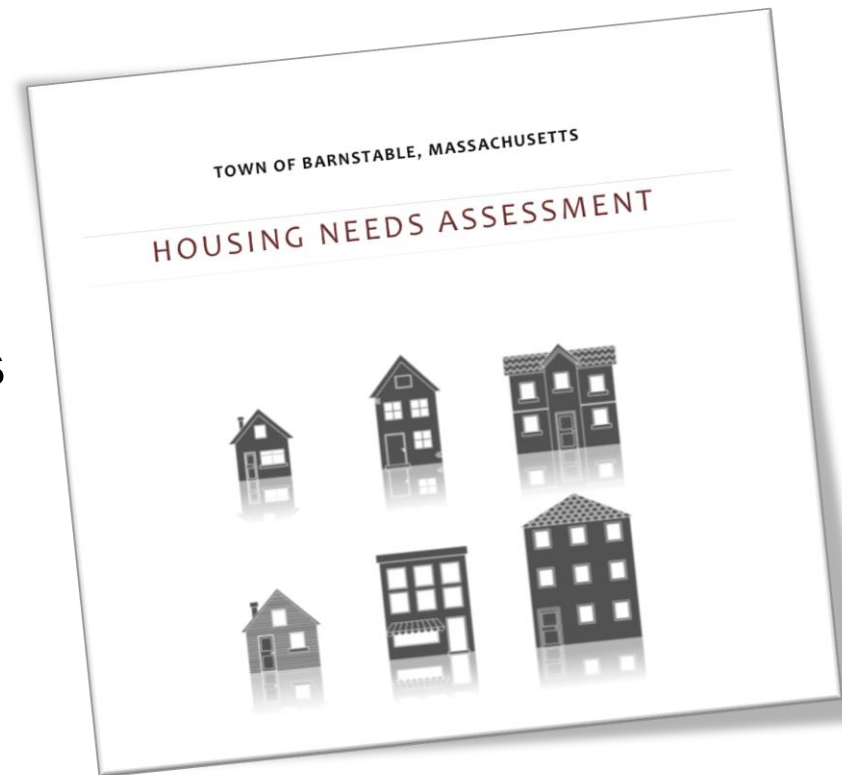
In addition to standard evaluation criteria include:

- Level and quality of public engagement
- Success with implementation of plans
- Quality of plans: readability, use of graphics, & clarity

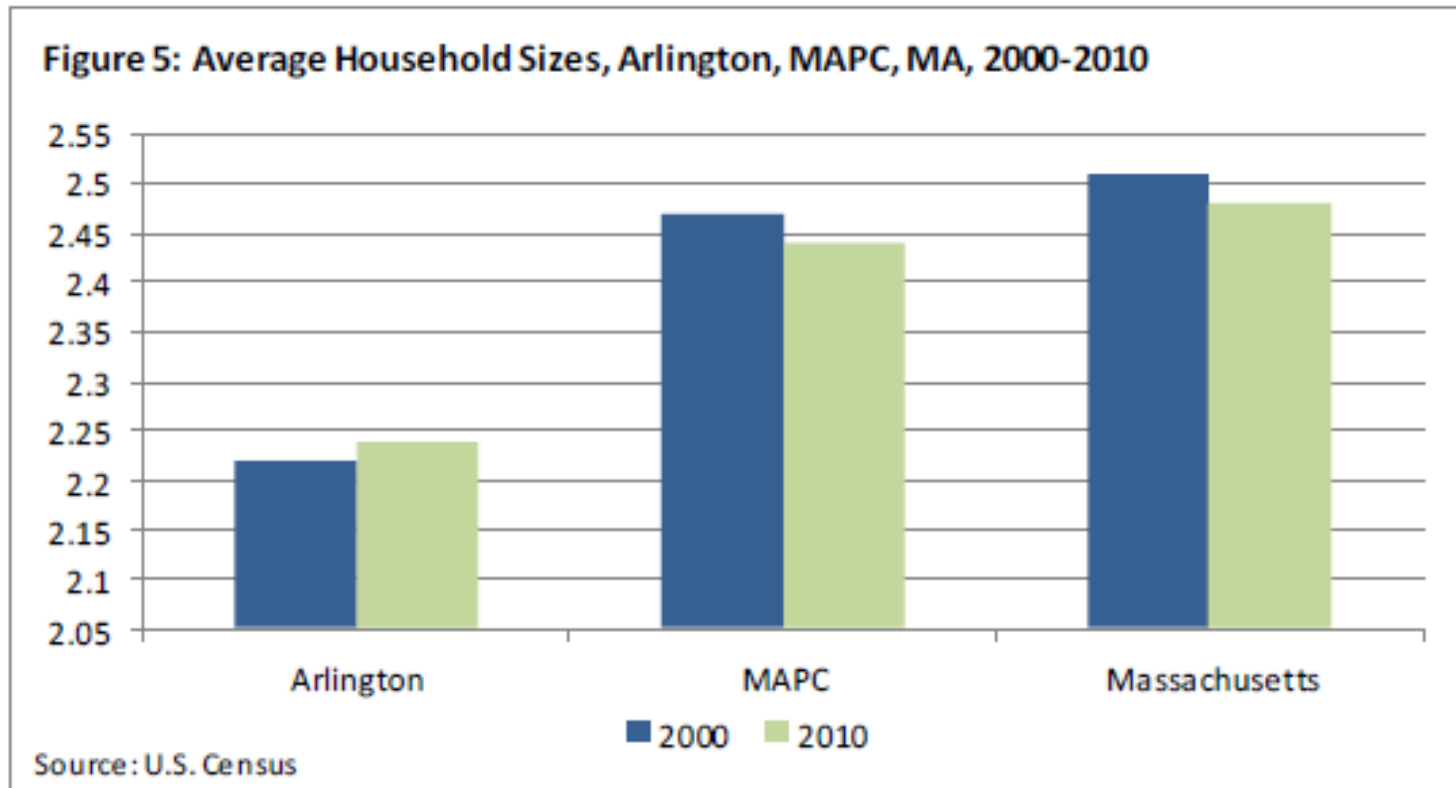
If overall project budget is public information, include it in the RFP per parameters of 30B

# Developing the Housing Needs Assessment

- Current & past data – analyze trends
- Surveys & interviews
- Public forums & board meetings
- Research on best practices
- Identification of existing resources



# Analysis of trends

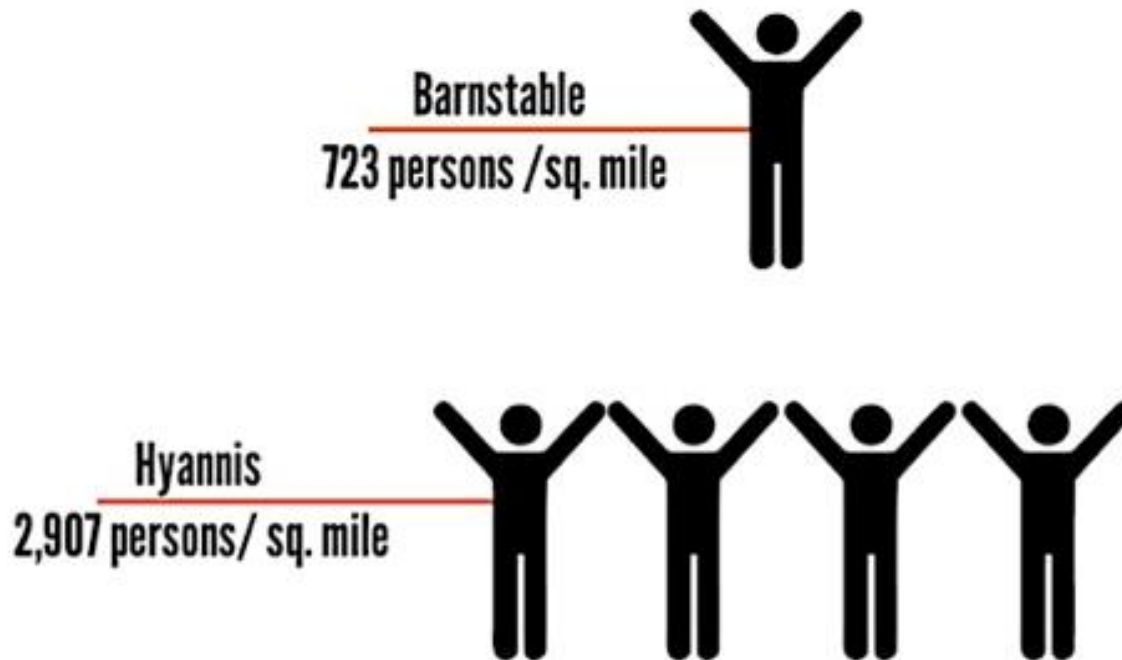


Average Arlington household size has increased slightly from 2.22 in 2000 to 2.24 in 2010. This corresponds to the recent increase in school-age children. Meanwhile, average household size in the broader MAPC region and the Commonwealth decreased during this time period.

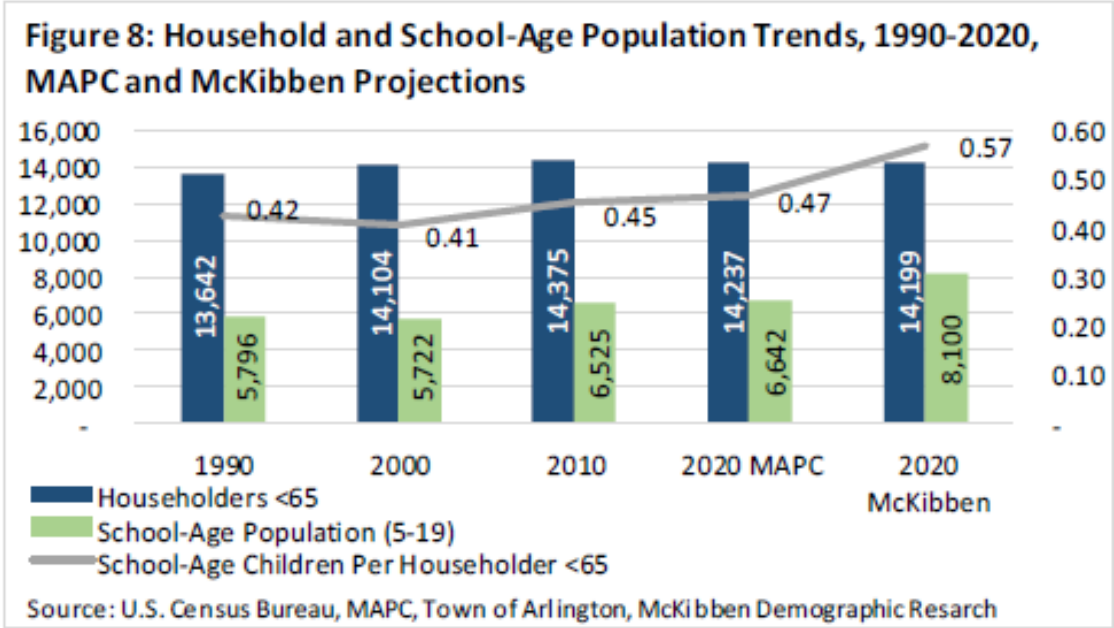
# Use of Graphics

## POPULATION DENSITY

(Source 2010 US Census)



# What's the real story about school children?

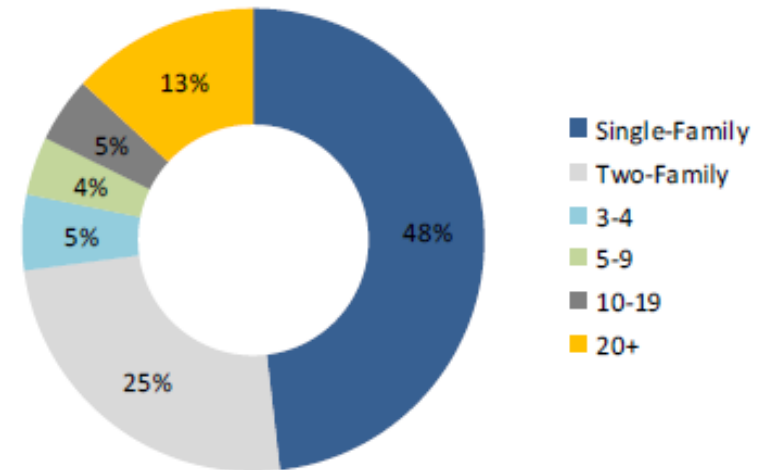


Recent population growth has coincided with an increase in the school-age population.

# How diverse is housing choice?

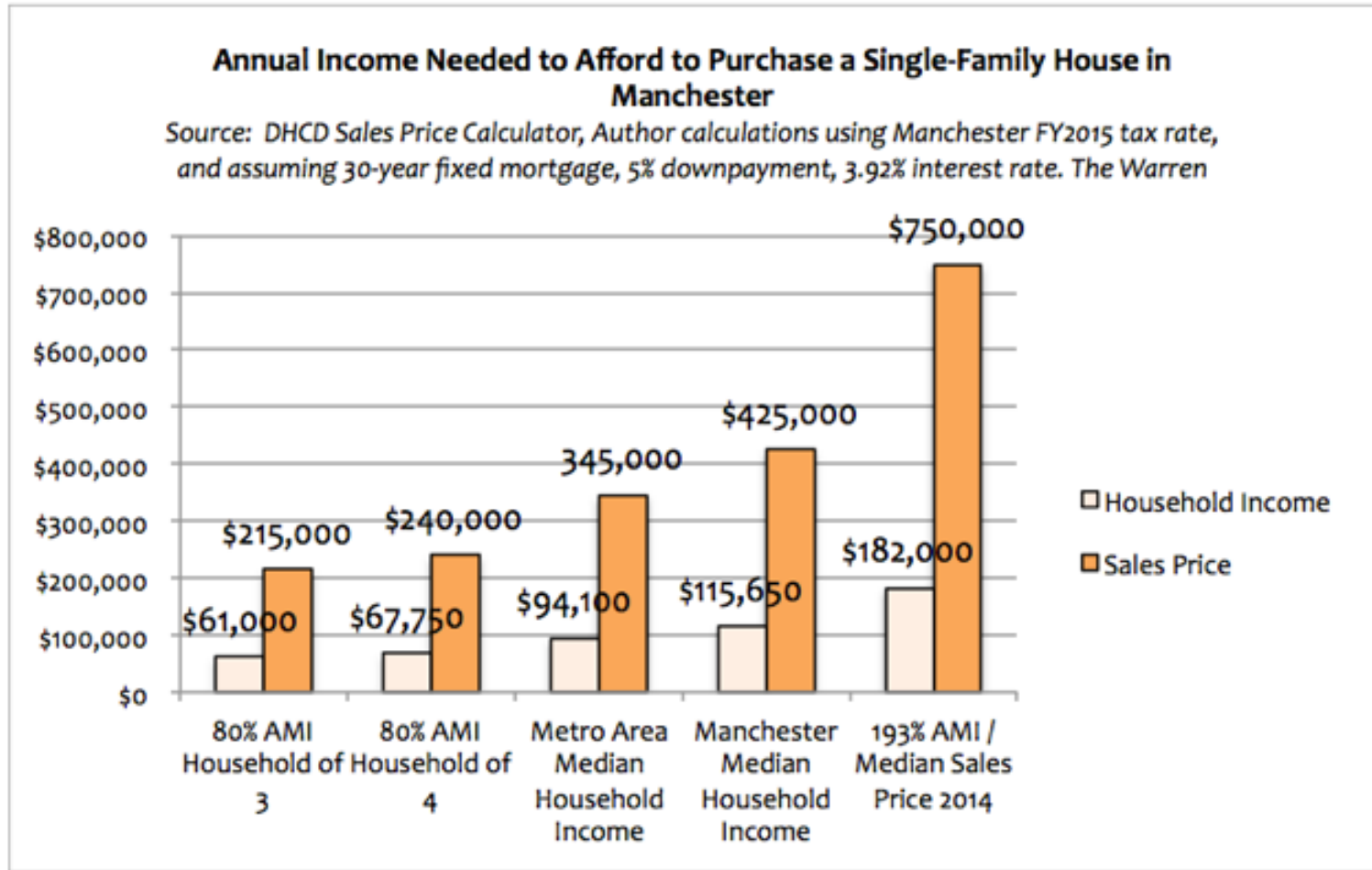


Figure 12: Arlington Housing Units by Type



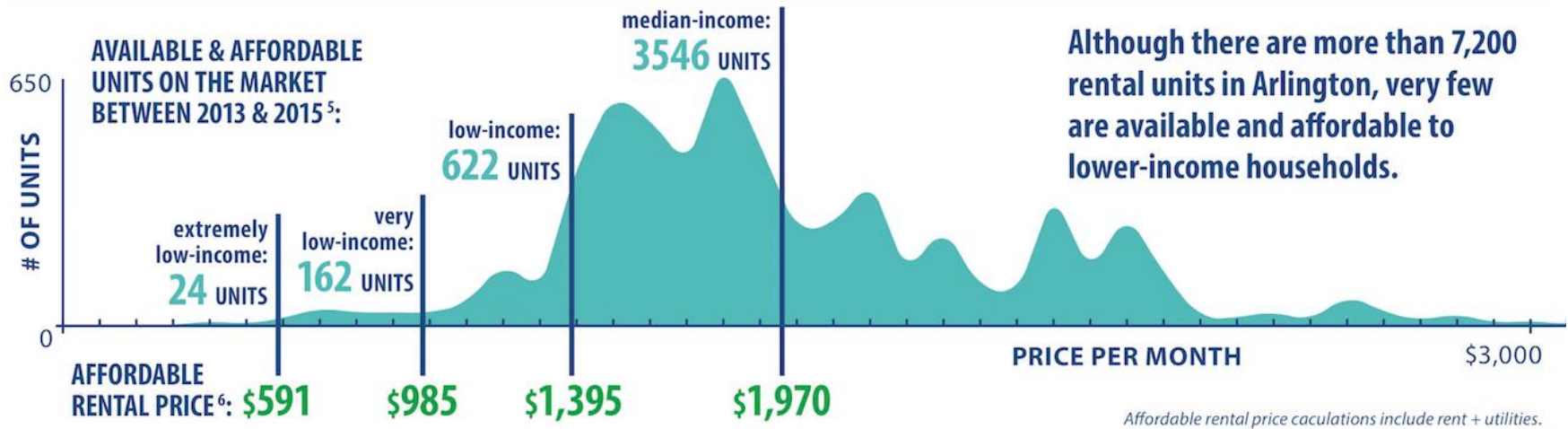
Source: U.S. Census Bureau, 2009-2013 American Community Survey

# How affordable is ownership housing?



# How affordable is rental housing?

## FEW APARTMENTS ARE AFFORDABLE TO LOWER-INCOME HOUSEHOLDS.



**1,460**  
rental units were converted to condos  
between 2000 and 2014.

Condos often require greater funds to occupy than apartments. In 2000, there were over 7,800 rental units.<sup>4</sup>



# What does it mean to be housing cost burdened?

Your Budget \$15/Hour = \$2600/Month

Budget Quiz 1:

If Housing is **50%** of your Budget:  
Leftover = \$1300  
**PICK 2 of 6 Expenses**



If the housing expense can be reduced to 30%, it helps give families flexibility to pay for other necessities.

Budget Quiz 2:

If Housing is **30%** of your Budget:  
Leftover = \$1820  
**PICK 4 of 6 Expenses**



# Housing MA

*Housing data, visualizations, and interpretation for Massachusetts*

Helping communities plan for the housing needed to create a vibrant and economically competitive commonwealth

Type in your city or town to begin

i.e. Agawam

Get started! ➔

## What's Inside

### Rich Data



Easily access rich, value-added data compiled from U.S. Census, Building Permits, Zillow, MAPC Projections, and more. Compare your city or town to its neighbors, region, and state.

### Guidance



Discover insights into key housing indicators in your city or town. Visualizations, interpretive text, and a user guide help you navigate and understand the data.

### Something for Everyone



Housing MA was designed to be used by citizen committees and expert analysts. Text and charts automatically reflect your city or town, and downloading the behind it is always a click away.

Start planning

# Ipswich

Select a service to assist your housing production planning process:

## Housing Data Profile



Select

View 30 statistics on demographics, housing cost, supply, and more in a single table.

Compare Ipswich to its neighbors, similar cities & towns, the region, and the state.

Export table to CSV.

[View summary tables →](#)

## Basic Needs Assessment



Select

View interactive visualizations of ### key housing indicators for Ipswich.

Read and export interpretive text tailored for housing trends in Ipswich.

Provides most of the required data elements for a housing production plan.

Export document to Word.

[Start planning →](#)

## Data Download



Select

Download all ### currently available data points for all cities & towns in the state.

Dig deeper and perform your own analyses.

Includes metadata and user guide.

[View datasets and guide →](#)

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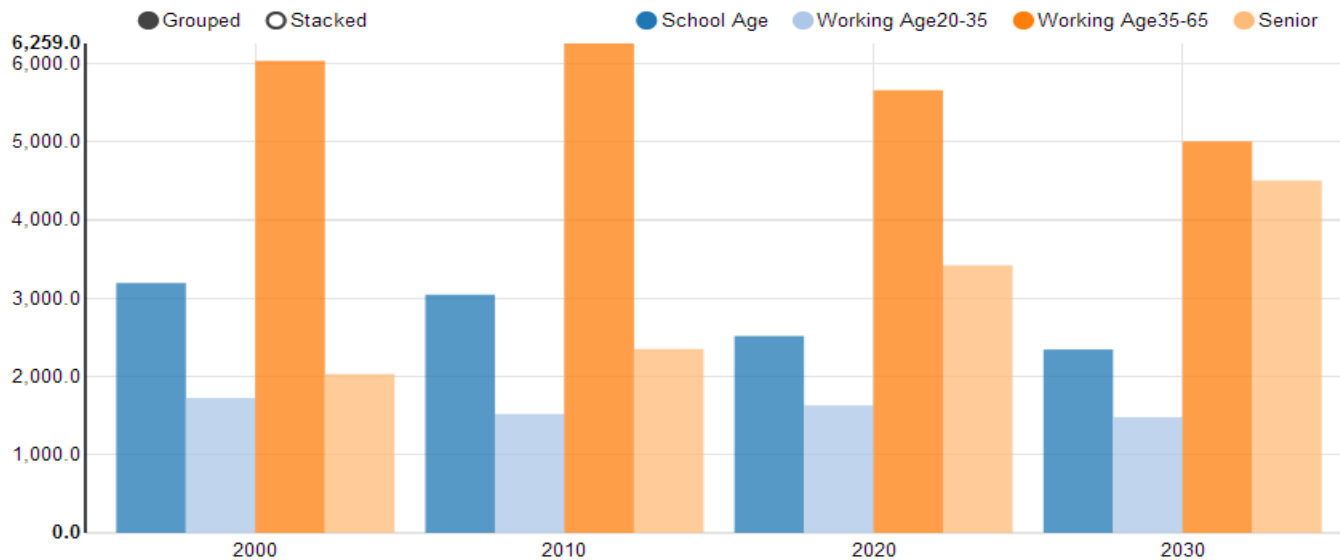
# Ipswich Housing Needs Assessment

Housing needs and preferences change over time. Young professionals and seniors on fixed incomes may prefer smaller, more affordable units that are easier to maintain. Families with children may want more space and access to quality schools. This section looks at the population of Ipswich by age and how it is projected to change.

## Demographics

Ipswich is home to 13175 residents, an increase of 1.4% from 2000. School-age children, between 5 and 19, make up 18.7% of current residents. Between 2005 and 2012, school enrollment has increased from 2085 to 2114, or 1.4%. Working-age adults, between 20 and 65, and seniors over 65, make up 59% and 10.1% of current residents, respectively.

Massachusetts is growing older. In all but one municipality, the senior population is expected to grow the most in percentage terms over the next two decades. In Ipswich, the senior population is expected to increase 2154, or 91.6206%, through 2030, as seen below. The total population is projected to increase by 159, or 1.2%, over the same period.



# Other Helpful Resources

- MHP Housing Needs Workbook  
[http://www.mhp.net/uploads/resources/mhp\\_housingneeds.pdf](http://www.mhp.net/uploads/resources/mhp_housingneeds.pdf)
- Massachusetts Housing Policy Toolkit  
[http://www.housingpolicy.org/index\\_MA.html](http://www.housingpolicy.org/index_MA.html)
- Metro Boston DataCommon  
<http://metrobostondatacommon.org/>
- HUD mapping tool:  
<http://egis.hud.gov/cpdmaps/>

# Evaluating Development Constraints

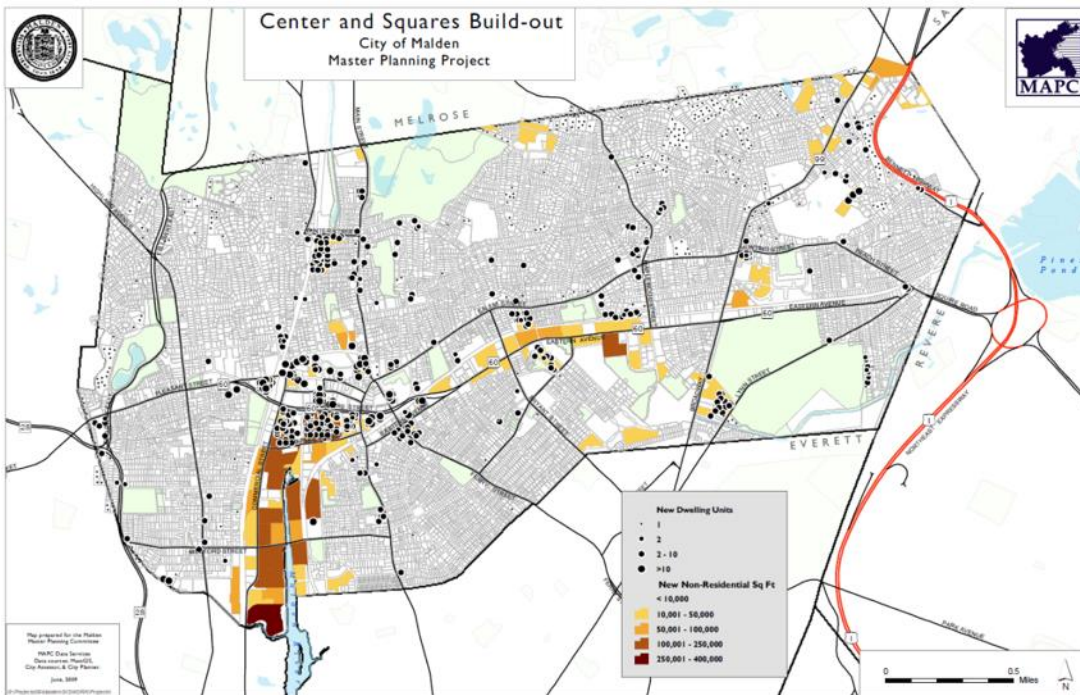


## Regulatory and Non-Regulatory Constraints:

- Land Use and Zoning
- Natural and Physical Constraints
- Municipal Resources/Capacity

# Evaluating Development Constraints

- Scenario Planning/ Scenario Modeling
- Market Analyses



# Evaluating Development Constraints: Future Growth

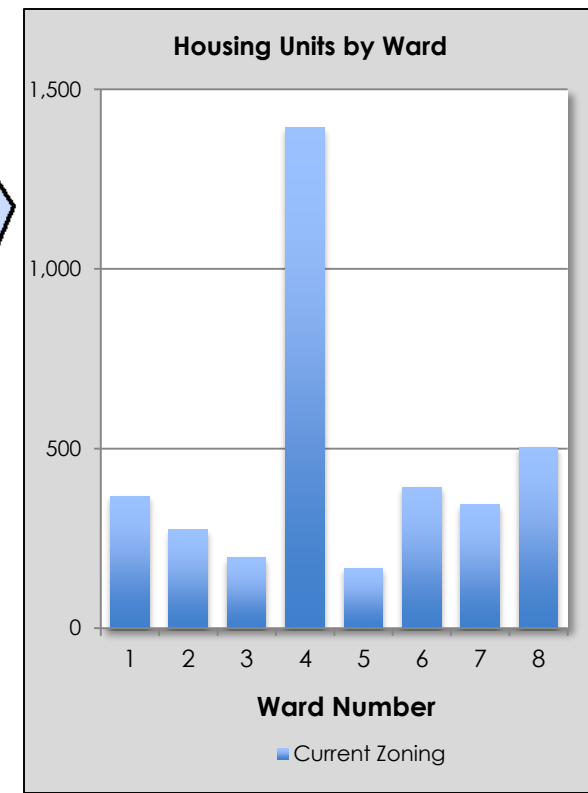
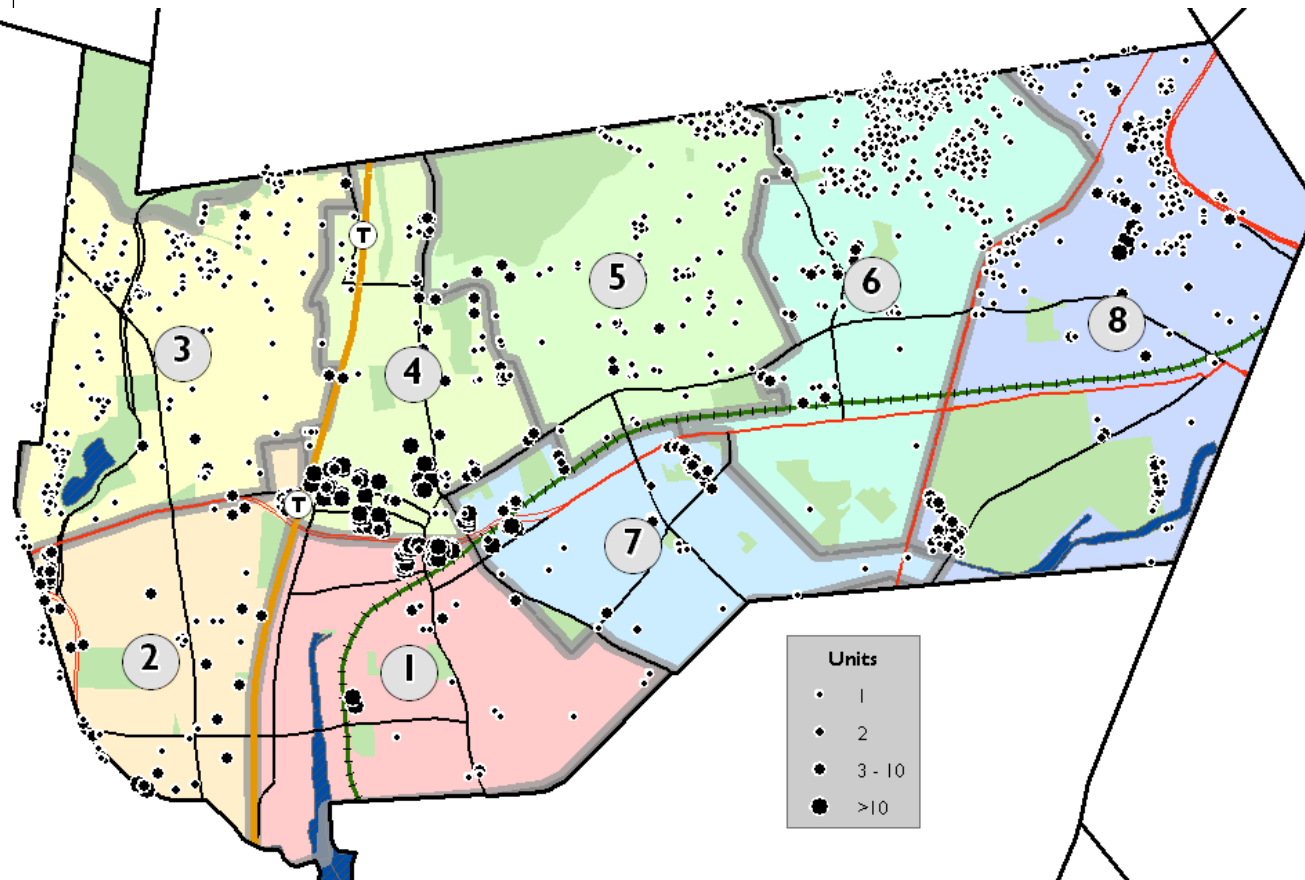
- What type of development is possible **under the current zoning?**
- What type of development might occur **if the zoning is changed?**
- What are the impacts of different changes?





# Current Zoning

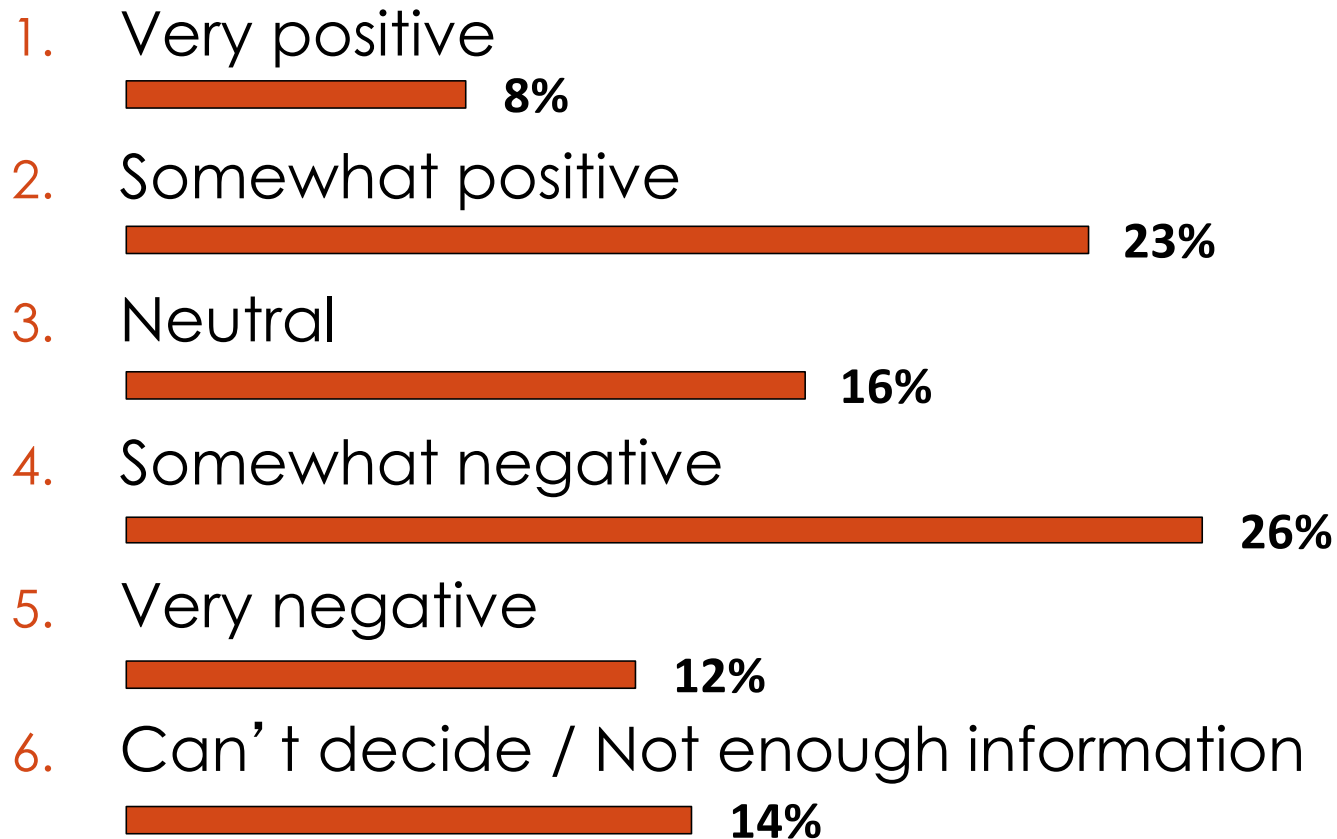
## Potential Growth by Ward



- Approximately half of new units in Wards 1 and 4

# Current Zoning

Overall how do you feel about the future of Malden as depicted in this scenario?



# Evaluating Development Constraints: Residential Market Analyses



Stoneham Town Center Market Study

## MARKETS

- Downtown Gloucester
- Stoneham Town Center
- Needham Street in Newton
- Reading Priority Areas

## PROJECT DESCRIPTION

These analyses estimate future market demand for new residential development based on geographic context, demographic trends, and housing location preferences.

## APPROACH

- Data analysis
- Capture analysis
- Public process
- Engagement with real estate and development communities

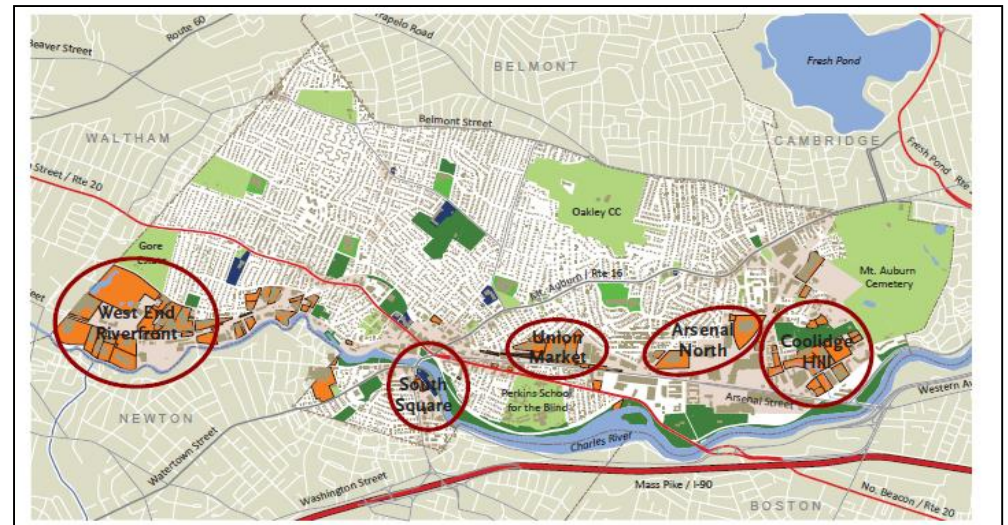
## PROJECT ELEMENTS

- Baseline Trends
- Existing Market Analysis
- Estimated Market Demand
- Potential Market (Local and Regional)

# Developing Goals/ Objectives/ Strategies

Things to consider:

- Relationship to other plans
- Economic and market realities
- Capacity to meet housing needs



**Economic Development Focus Areas, Watertown Economic Development Plan 2011**

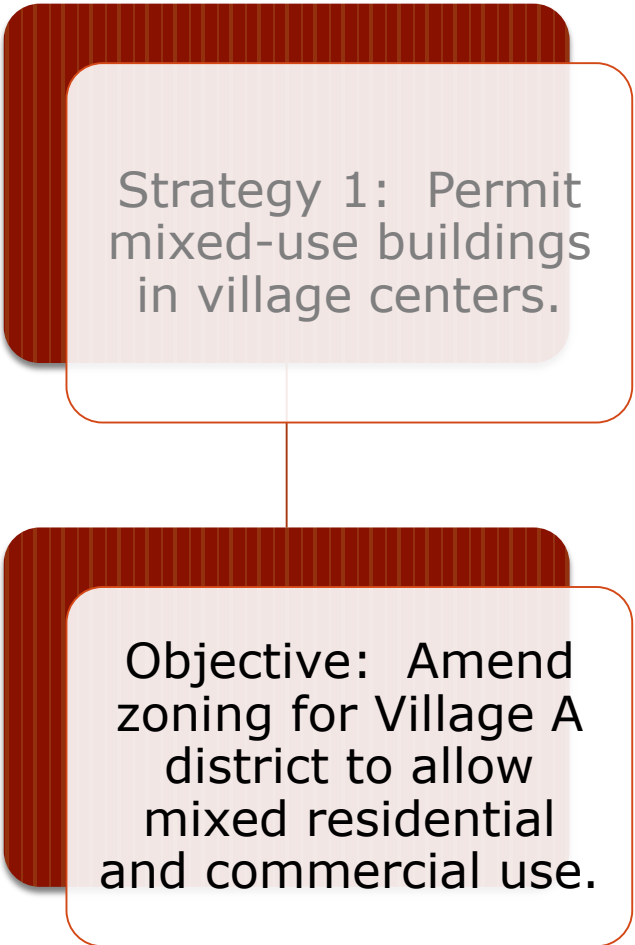
# Goals = broad primary outcome

Goal: Reinforce economic goals by expanding housing choice to respond to changing community demographics and housing preferences

# Strategy = approach to achieve goals



# Objective = a measurable step to achieve a strategy



Strategy 1: Permit mixed-use buildings in village centers.

Objective: Amend zoning for Village A district to allow mixed residential and commercial use.

# Action = step to pursue objective

Objective: Amend zoning for Village A district to allow mixed residential and commercial use.

Action: Spring 2015  
– Town Planner to draft mixed-use bylaw amendment to submit to Planning Board.

Action: Spring 2015  
Town Planner to identify case study sites to visually test proposed bylaw amendments.



# Public Forum/Workshop

- Key component of process to reach agreement on priority strategies
- Bring together key stakeholders, town officials, and potential partners
- Public hearing is not the best format for vetting strategies
- Interactive workshop style promotes collaboration



# Adopting & Implementing the Plan

- Identify leadership & accountability
- Build capacity
- Tackle low hanging fruit – see results fast and promote
- Regular progress reports



- Any questions? Clarifications?
- Introduce Exercise #2 – What to do next?