



Regional Housing Studies Overview

As of January 15, 2019

Urban Land Institute (ULI) Washington District Council

- Research report publication anticipated next 30-60 days
- “The research of the ULI Washington Housing Impact Task Force will address two elements related to the region’s housing affordability crisis:
 - (1) the role of municipal entitlement, permitting, and approval processes in facilitating or constraining a diverse range of housing choices attainable to the region’s workforce, with the goal of identifying opportunities to better support broad-based housing affordability, and
 - (2) the extent to which community engagement can lengthen the development process, increase its cost, and impact or discourage the quantity and quality of developing new housing.”
- Two consultants were hired to conduct the research: [Neighborhood Fundamentals](#) (Michael Spotts) and a non-profit arm of [Rhodeside & Harwell](#) (Deana Rhodeside and Eric Feldman).
- Geographic study area is the metropolitan Washington region, with a special focus on Montgomery County, Arlington County, and the District of Columbia.

Greater Washington Partnership

- Working project title: “[Washington Regional Housing Framework](#)”
- Research process began August 2018, with anticipated 16 – month timeframe
- [Urban Institute](#) was hired to conduct the research (Marge Turner, Gustavo Velasquez, Peter Tatian and Leah Hendey)
- “The Washington Regional Housing Opportunities Initiative aspires to accelerate efforts begun by participants in the Housing Leaders Group of Greater Washington, uniting the region around actions (including capital, policy, and communications) that will support inclusive prosperity and growth by advancing three principles:
 1. preserve existing affordable housing in all communities, including opportunity-rich and revitalizing areas;
 2. produce more housing across the income spectrum and in communities throughout the region, so all jurisdictions contribute to and benefit from meeting everyone's housing needs;
 3. protect both renters and homebuyers from discrimination and involuntary displacement. The work of the Initiative will proceed in two phases:

September- December 2018: leverage existing data and analyses to establish housing goals for the region to ensure that the market meets the needs of current and future residents at all income levels.

January- December 2019: develop and analyze local strategies for achieving progress toward the region-wide goals, determine the implementing actions needed to realize that progress, conduct community outreach and engagement, and seek commitments for action by engaged stakeholders. Some new investments and activities will be launched during 2019; many others will be implemented over a longer period.

George Washington University Center for Washington Area Studies

- Report title: *State of the Capital Region 2019: Housing*
- Report publication anticipated May 2019 with accompanying event
- The report “aims to provide insights into how well housing markets are meeting the needs of households and to identify challenges that may require policy intervention. The report also serves as an integrated, easily accessible source of regional and local data for government agencies and non-profit organizations.”
- Questions to be addressed in the report include the following:
 - How does the quantity, age, type, and cost of housing stock vary across the region?
 - What do changing economic and demographic characteristics imply for housing demand? How does housing demand vary between central, suburban, and exurban locations?
 - Where has new housing been built across the region? How much new housing has been developed near major employment centers and transportation infrastructure?
 - Are there locations where implied demand for housing is high, but new development has been limited by regulatory barriers?
- Geographic study area is the District of Columbia and all counties and independent cities within the Washington-Arlington-Alexandria metropolitan area.

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Metropolitan Washington Council of Governments (COG)

- COG Board of Directors signed a resolution in September 2018 requesting regional Housing Directors and Planning Directors to work jointly to address the need to increase housing production by at least 100,000 more homes by 2045 than is currently anticipated in the COG Cooperative Forecast.
- Directive is an outgrowth of COG’s Transportation Planning Board (TPB) “Visualize 2045” long range plan which resulted in recommended strategies to optimize transportation system performance.
- The Planning Directors and Housing Directors will address both the opportunities and impediments to increasing the production of housing, guided by the following key questions:
 1. “**Amount**”: how many of the 100,000 additional housing units needed can be accommodated within current comprehensive plans and zoning?
 2. “**Accessibility**”: of the additional units, how many can be reasonably accommodated in Activity Centers and High-Capacity Transit station areas?
 3. “**Affordability**”: what is the appropriate target/price point for housing for our anticipated new jobs?
- Through the analysis of these three areas above, the goal will be to assess not only “can we accommodate an additional 100,000 homes above what is currently forecasted”, but also, “what would it take?” to ramp up housing production beyond current levels to achieve this goal.

- Anticipated completion date of October 2019
- Geographic study area includes COG member jurisdictions (not the metropolitan Washington MSA).

Areas of Housing Study Similarities and Distinctions:

- ULI Washington study evaluates regulatory barriers and community opposition as key barriers to housing production. Description of development and financial community constraints unclear. Geography is effectively limited to Montgomery County, Arlington County, and the District of Columbia.
- George Washington University's study will pull from Census Bureau and other publicly-available data sets for its research. Focus will be on housing market performance, with some policy recommendations.
- Greater Washington Partnership's scope with the Urban Institute is the most comprehensive of the four studies and will be underway for all of 2019.
- COG's study is designed to address the current (and projected) shortage of housing units for jobs and workers. Its goal is to bring housing and jobs closer together and improve transportation system performance. It does not address the full spectrum of housing need in the metropolitan Washington region (retired or disabled workers, children, and special needs housing are excluded).

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