

REGIONAL HOUSING STRATEGY



Central Ohio Regional Housing Strategy

Existing Conditions – Findings To-Date

November 13, 2019



Agenda

- Welcome
- Putting this meeting in context
- Data walk
- Large group discussion of data findings
- Wrap-up & next steps

Meeting Objectives

By the end of this meeting we will have:

A shared **understanding of key regional housing findings**, which are forming the foundation for the RHS.

Feedback on **areas to dig in further** as we complete the rest of the analysis.



Putting this meeting in context

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

What does a successful RHS look like?



Priorities guiding the Research Plan & Public Involvement Plan (PIP)

Data/Info



- What does attainable housing look like?
- What are the opportunities for coordination?
- What are the gaps in current programming?
- What are the drivers of housing cost burden?
- What is Central Ohio's housing investment portfolio, and what should it be?

Perspectives



- People experiencing housing instability
- Educational institutions
- Seniors and persons living with disabilities
- Development community

End Users



- Policymakers
- Employers (including economic development prospects)
- Media
- Local governments and other organizations creating plans/strategies within the region

Since August, we have...

Gathered, cleaned, & analyzed over 100 variables across 50 datasets to understand existing housing conditions

Developed and released community survey to nearly 3,000 recipients

Initiated MPO peer exchange

Began inventory of all active public and private funding for housing in the region

Finalized Research Plan and Public Involvement Plan (PIP)

Drafted housing submarket typology analysis and hosted stakeholder review meeting

Synthesized existing findings & recommendations from 28 reports on housing in Central Ohio

Assessed first round of impediments to housing development in the region

Research Plan update

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

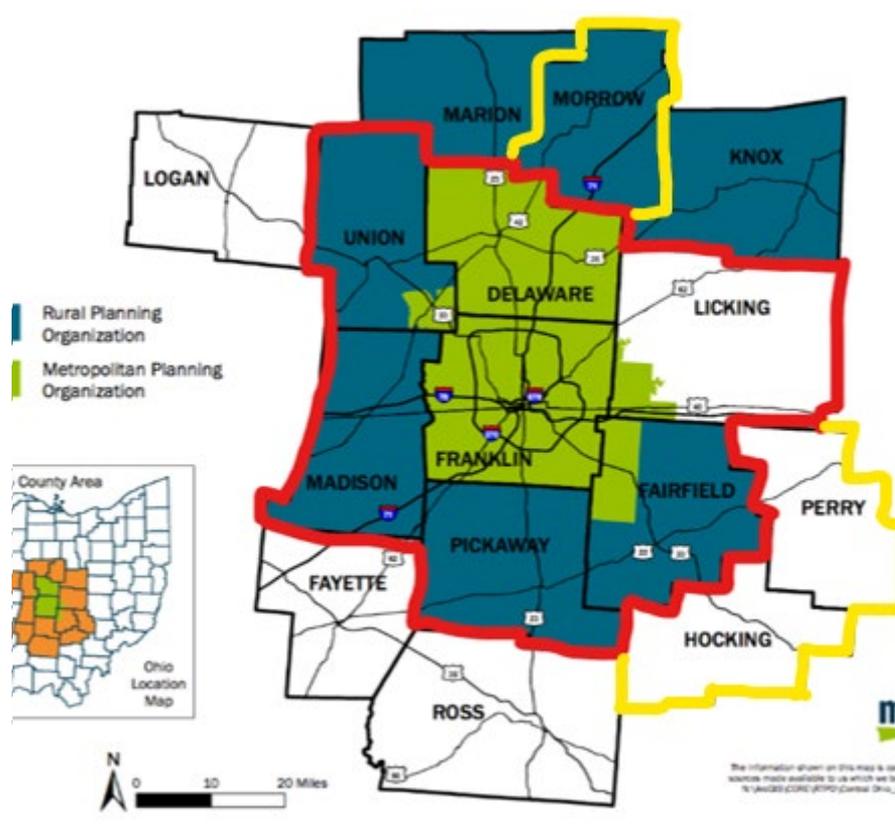
Research Plan update

Geographies for 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

PIP update

Summary of groups for targeted engagement

Broad outreach to the Central Ohio community will be supplemented by outreach to the following groups:

State & Local government officials, elected leaders, & staff (including area commissions)

Public housing authorities

Developers (for-profit and/or mission-driven)

Property owners & landlords

Financial institutions

Households

Housing nonprofits, advocates, & service providers

Relevant trade associations (including Realtors and builders and other construction trades)

Philanthropies

Large employers & anchor institutions

Academic institutions

Healthcare providers

Transportation providers

Utilities providers

Economic development/Workforce development

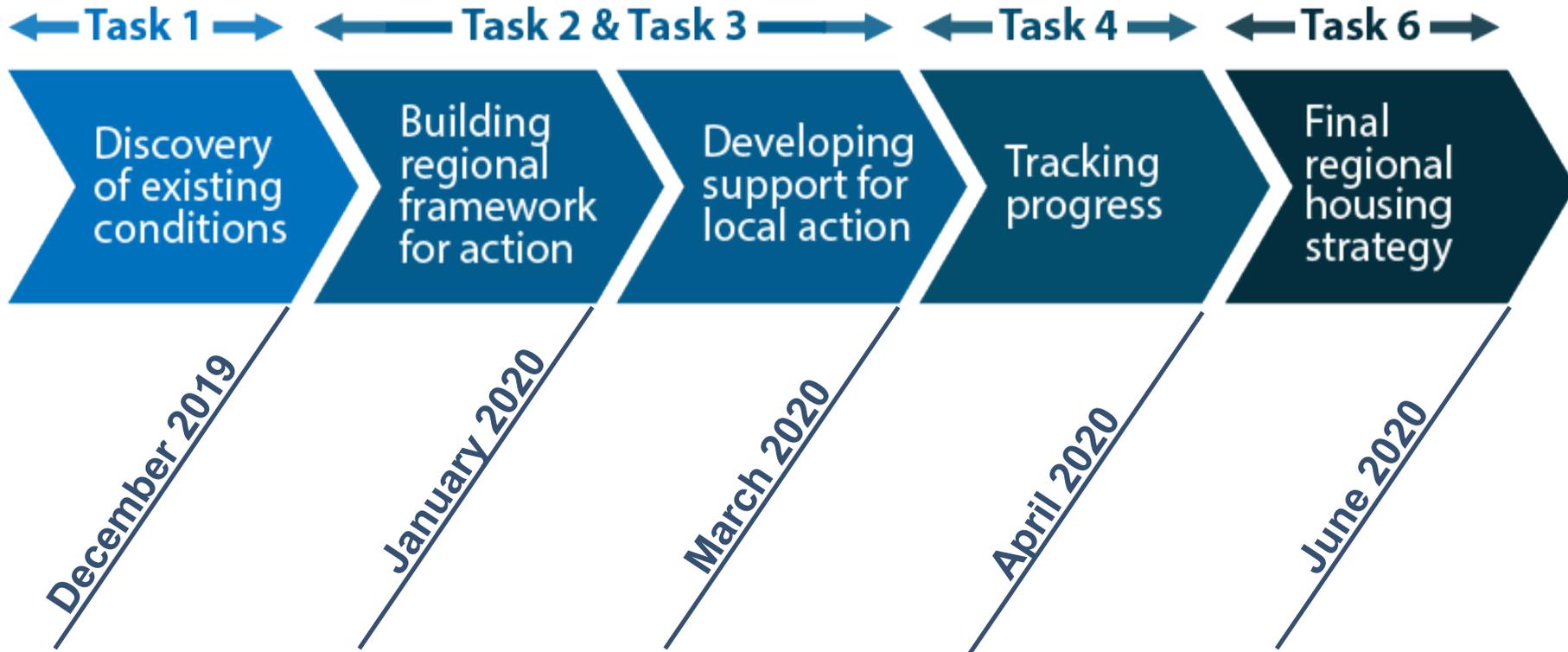
PIP update

Summary of engagement tactics

- Broad and targeted surveys
- Focus groups
- Interviews
- Community workshops
- Strategy sessions
- Presentations at community meetings
- Learning exchanges
- Web release of project materials

...and more to be developed for public roll-out of the final RHS

Updated project timeline



Stakeholder meeting schedule



Nov 2019
Review & prioritize regional housing needs

Jan 2020
Joint strategy session #1
Prioritize housing strategies

Mar/Apr 2020
Joint strategy session #2
Align strategies with funding

May 2020
Finalize recommendations & discuss implementation



Data walk

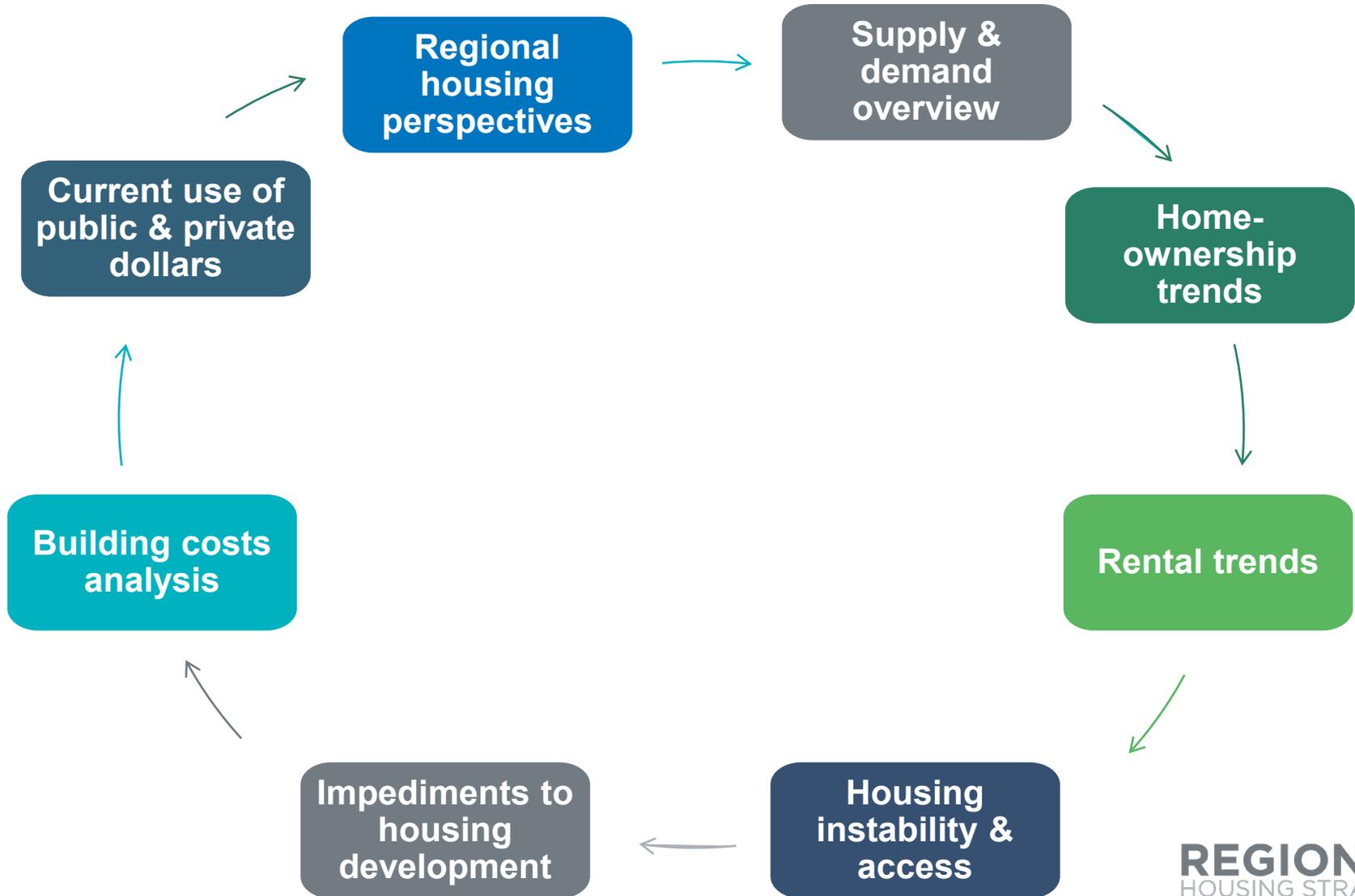
Engaging with the analysis
completed to-date

What is a data walk?

An interactive way to share large amounts of data and research findings

- You will rotate through different data stations in small groups
- At each station, you will be exposed to data and have opportunities to clarify and reflect on the findings the data suggest
- This is designed to ensure a more robust analysis and understanding of the data

Data stations



Data sources

Station	Data source(s)
Regional housing perspectives	RHS community survey – distributed to 3,000+ Central Ohioans; 902 responses received
Overview of regional housing supply & demand	50 different datasets analyzed, including: <ul style="list-style-type: none"> • American Community Survey • Comprehensive Housing Affordability Summary • Zillow • PolicyMap • National Housing Preservation Database • Local auditor data • Eviction Lab • Home Mortgage Disclosure Act
Homeownership trends	
Rental trends	
Housing instability & access	
Impediments to housing development	Interviews; focus groups; regional developers survey – distributed to 100+ developers (small, large, for-profit, nonprofit, etc.); 31 responses received to-date
Building costs analysis	National literature review; analysis of local pro formas; regional developers survey
Current use of public & private dollars	Programmatic documents across 35+ funding sources for multifamily development and homeownership

What you will not see

Data at the sub-regional level

- Municipality-level data
- Submarket data

Remaining analyses to be completed, including:

- Mapping the landscape of opportunity
- Identifying displacement risk across the region

Final data visualizations

Recommendations

Data walk logistics

We have printed posters with major data findings that jumped out to us, hung up at stations around the room.

- There are fact sheets with additional data at each station as well.

We will count off into small groups for rotating through the stations.

Each group will have 8 minutes per station.

The station lead will provide an overview and then there will be time for clarifying questions.

Groups will move to the next station when they hear the chime sound.

You can write down thoughts/reflections as you walk.

The data walk will be followed by large group discussion.



Guiding questions

What stands out?

- What finding was the most surprising to you and why?
- What finding was the least surprising to you and why?

After reviewing the data, what questions do you still have?

- What areas of research do you feel need more attention?
- Where could we dig deeper?





Large group reflection

What stood out to you in these findings? What questions do you still have?

Guiding questions

What stands out?

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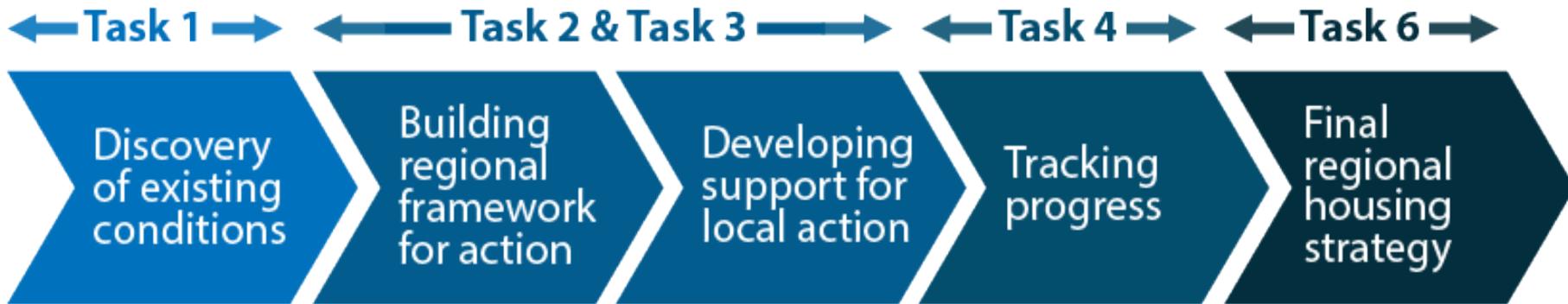


Upcoming activities

What's next?

Upcoming activities

Stakeholder meeting schedule



Nov 2019

Review & prioritize regional housing needs

Jan 2020

Joint strategy session #1
Prioritize housing strategies

Mar/Apr 2020

Joint strategy session #2
Align strategies with funding

May 2020

Finalize recommendations & discuss implementation

Upcoming activities

Between now and our next meeting we will...

- Complete additional **existing conditions analyses** & draft Technical Report #1 about those findings.
- Launch additional **focus groups and interviews**.
 - Impediments to housing development
 - Use of current public & private dollars for housing
 - Unpacking housing needs
- Build out a **menu of potential actions**, based on national best practice, existing local recommendations, and innovative new ideas.
- Hosting **community conversations** on affordable housing.



SAVE THE DATE
*Community conversation on the
impact of segregation on housing,*
12/13/19 at 9 AM at MORPC

Thank you!

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

