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?

**Process**
- Community-driven
- Collaborative

**Recommendations**
- Action-oriented
- Sustainable
- Measurable impact

**Results**
- Strengthened capacity
- Improved access to opportunity
- A more inclusive housing market
## 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...

**Finalized Research Plan and Public Involvement Plan (PIP)**

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

**Developed and released community survey to nearly 3,000 recipients**

Drafted housing submarket typology analysis and hosted stakeholder review meeting

Initiated MPO peer exchange

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

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.
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

- Discovery of existing conditions: December 2019
- Building regional framework for action: January 2020
- Developing support for local action: March 2020
- Tracking progress: April 2020
- Final regional housing strategy: June 2020
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

Regional housing perspectives -> Supply & demand overview

Current use of public & private dollars

Home-ownership trends

Building costs analysis

Rental trends

Impediments to housing development

Housing instability & access
## Data sources

<table>
<thead>
<tr>
<th>Station</th>
<th>Data source(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regional housing perspectives</td>
<td>RHS community survey – distributed to 3,000+ Central Ohioans; 902 responses received</td>
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</table>
| Overview of regional housing supply & demand | 50 different datasets analyzed, including:  
• 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.
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?
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?
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.
Thank you!

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

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