

Housing Needs Assessment & Anti-displacement and Reinvestment Strategy

Community Planning & Housing Committee

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Agenda

- Project Overview
- Scope of Work
- Anti-Displacement and Reinvestment Strategy
- Timeline and Deliverables
- Questions and Discussion

Project Overview

The State of Colorado (through SB24-174) now requires jurisdictions >1,000 people to conduct a Housing Needs Assessment (HNA) every 6 years. HNAs inform required Housing Action Plans (HAP)

HOST received a DOLA grant to support the HNA

The HNA will form the basis for HOST's Strategic Plan update (which can serve as the State-required HAP) and provide current data to guide investments, program, and policy decisions

Scope of Work

Demographic Analysis

- Population and household trends, projected growth
- Age distribution of current and projected population
- Tenure and mix of units occupied by renters and owners
- Household size, household types, trends
- Income distribution by tenure and trends
- Impact of population and household trends on housing demand

Housing Market

- Units by type and change
- Vacancy and occupancy trends
- Housing price trends, homeownership attainability
- Current and projected housing supply and income-restricted units/NOAH
- Accessible and visitable units
- Preservation needs
- Development trends, units planned, development constraints

Economic Analysis

- Current jobs by wage and dominant industries
- Affordability of median rents and home prices by job type
- Projected job growth by wage and industry
- Denver's share of regional jobs by salary/wage
- Commuting patterns, jobs/housing interplay

Scope of Work

Displacement

- Race and ethnicity and shifts by income
- Geographic areas at elevated risks of displacement
- Denver's history of anti-displacement strategies and programs and best practices
- Policy matrix of existing and proposed initiatives

Housing Needs

- Cost burden by tenure, overcrowding, homelessness
- Eviction trends and projected inflow into homelessness from evictions
- Projected housing shortages by household types and affordability level
- Allocation of needs by neighborhood/submarket

Policy and Programs

- Denver's history of policy and programmatic responses to housing needs
- Existing resources for homelessness resolution and affordable housing development
- Recommendations by number of units and estimated cost

DRCOG 2025 HNA Methodology—Key Factors

Methodology

Houses unhoused and "missing households" ~ moving young adults out of parents' homes

Achieves a 4.7% vacancy rate and assumes increased rental affordability from aging and filtering

Uses State Demographer projected household growth

Housing needs by price point assumes AMI distributions and affordability as of 2013

2050 Needs

Needed units =

- 32,100 < 50% AMI
- 6,150 50-80% AMI
- 4,240 80-100% AMI
- 2,830 100-120% AMI
- 9,130 120%+ AMI

Denver's current share of Central regional needs is based on 9% of market areas jobs, 8% of population. Denver's future share is based on 25% of future job and 26% of developable land and transit

Anti-Displacement and Reinvestment Strategy

Goal: Develop a citywide understanding of displacement in all its forms—residential, commercial, institutional, cultural

Outcomes:

- Detailed analysis of displacement risk and development of an "early warning" and tracking system (e.g., commercial lease rates, businesses closing/changing, rent increases, eviction rates, loan rejections). Risk looks different by neighborhood context: Analysis will consider how risk indicators and characteristics of vulnerable residents and businesses vary
- Evaluation of current efforts and improvements to cross-agency and community coordination, resource prioritization, and timing/targeting of anti-displacement efforts to mitigate displacement risk
- Comprehensive policy and programmatic framework and prioritization that addresses different types of and drivers of displacement, leveraging existing initiatives. Alignment with equity goals and place-based investments

Examples of Analysis

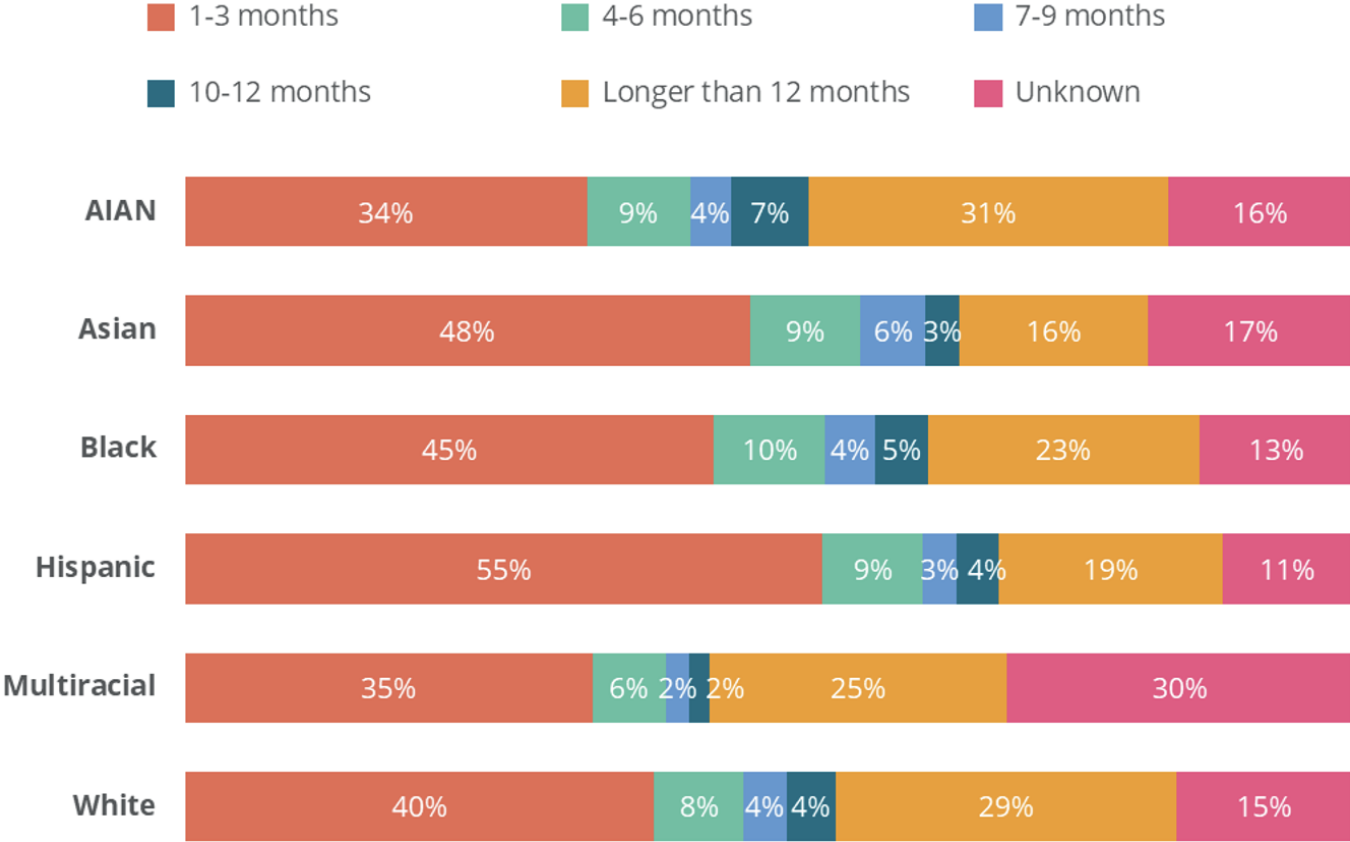


Industry Distribution by Race and Ethnicity, Denver, 2022

| Industry of Household Head | AIAN | Asian | Black | Hispanic | Multiracial | White | All | Median Income (All) |
|---|-------------|-------------|-------------|-------------|-------------|-------------|-------------|---------------------|
| Information | 0% | 3% | 2% | 2% | 2% | 4% | 3% | \$149,000 |
| Finance, Insurance, and Real Estate | 6% | 8% | 3% | 5% | 7% | 9% | 7% | \$126,800 |
| Professional, Scientific, Management, Admin | 12% | 19% | 11% | 14% | 17% | 21% | 19% | \$120,000 |
| Public Administration | 4% | 1% | 5% | 3% | 5% | 3% | 3% | \$108,000 |
| Manufacturing | 0% | 4% | 1% | 6% | 7% | 5% | 5% | \$100,000 |
| Education, Healthcare, and Social Services | 21% | 16% | 27% | 14% | 17% | 19% | 19% | \$90,000 |
| Construction | 2% | 1% | 3% | 12% | 5% | 4% | 6% | \$86,170 |
| Transportation, Warehousing, and Utilities | 10% | 5% | 10% | 5% | 5% | 3% | 4% | \$83,500 |
| Agriculture, Forestry, Fishing, and Mining | 2% | 1% | 0% | 1% | 0% | 1% | 1% | \$82,260 |
| Other Services | 0% | 6% | 2% | 4% | 5% | 3% | 4% | \$75,000 |
| Trade | 34% | 13% | 8% | 8% | 8% | 8% | 8% | \$71,000 |
| Arts, Recreation, Food Services | 3% | 7% | 6% | 7% | 8% | 6% | 6% | \$69,500 |
| Unemployed or Out of Labor Force | 6% | 17% | 21% | 19% | 14% | 13% | 15% | \$35,600 |
| Total | 100% | 100% | 100% | 100% | 100% | 100% | 100% | \$85,000 |

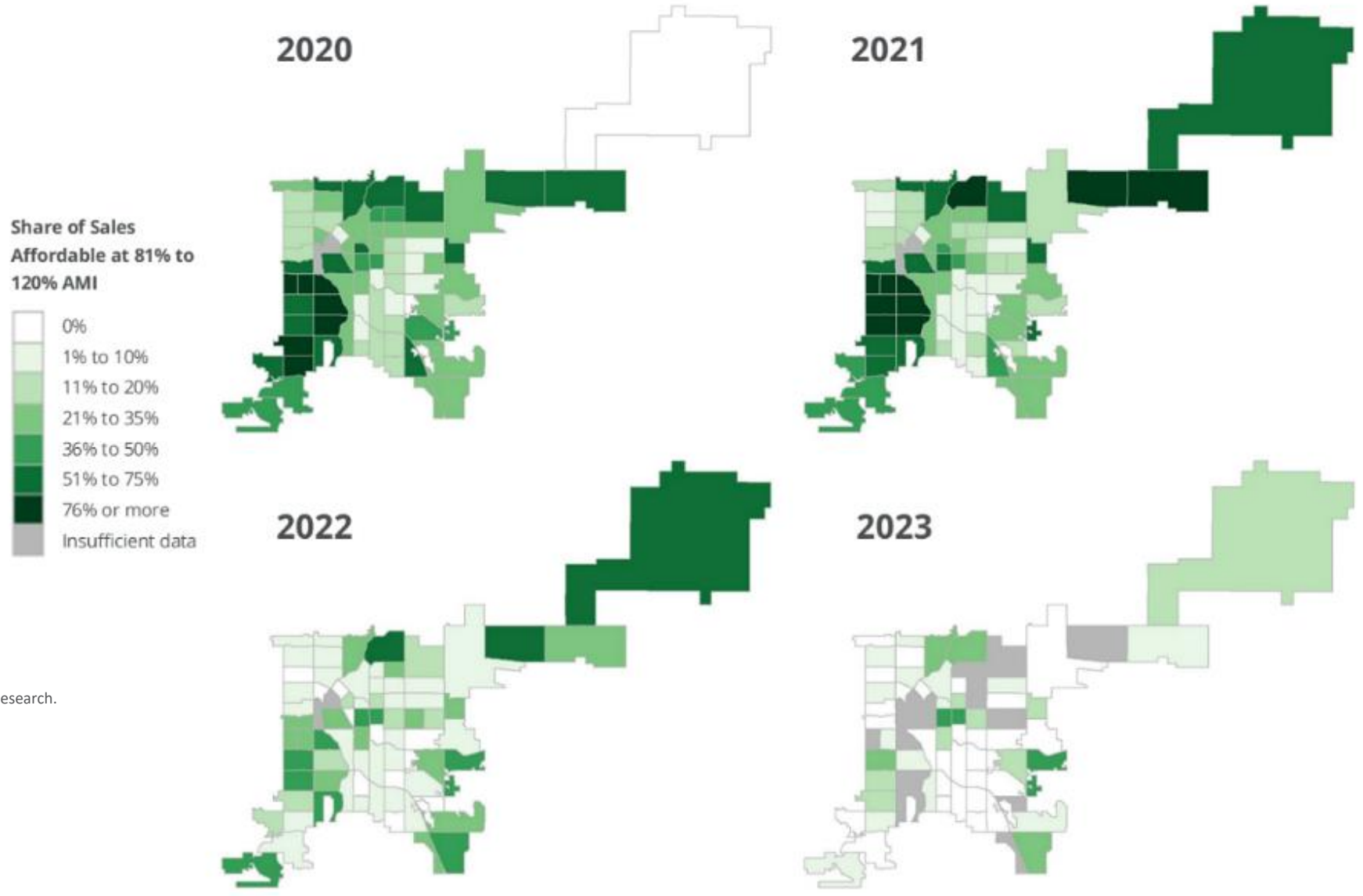
Source: IPUMS based on 2022 1-year ACS estimates and Root Policy Research.

Months Experiencing Homelessness by Race and Ethnicity, Denver, 2019-2023



Source: MDHI HMIS Data and Root Policy Research.

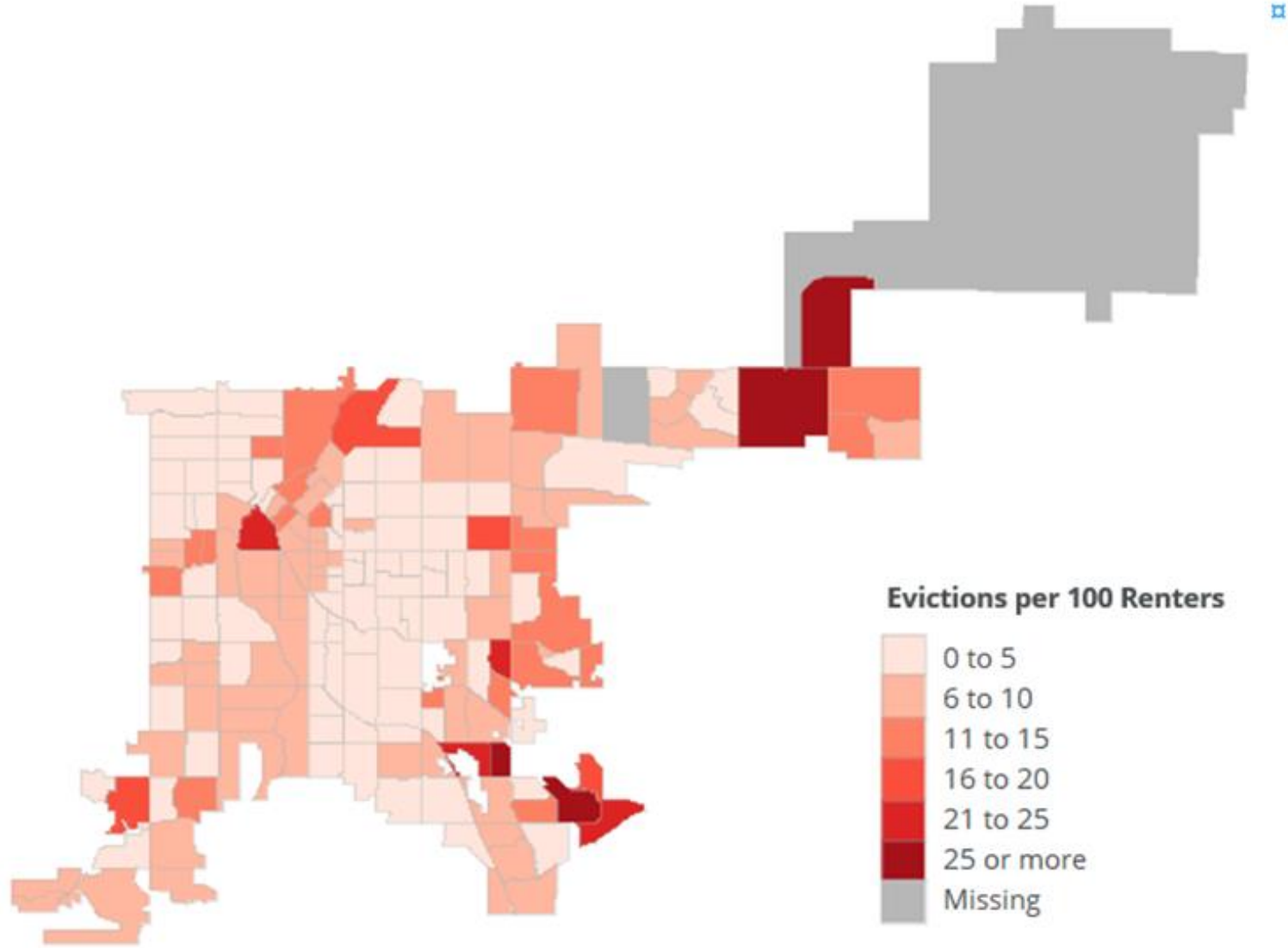
Share of Home Sales Affordable to 81-120% AMI, 2020-2023



Source: Denver County Assessor, HUD AMI limits, and Root Policy Research.



Eviction Filings per 100 Renters, 2023



Source: Denver County Courts and Root Policy Research.

Timeline and Deliverables

Currently:

Collecting data

Outlining sections

Planning community engagement—emphasis on focus groups with target residents with compensation for their time

Developing displacement risk assessment approach

Deliverables:

Preliminary housing needs and projections—July

Displacement risk assessment—August

Policy and program recommendations and Anti-Displacement Strategy—September

Draft and Final Report—September through November

Questions and Discussion

