



HOUSING OPPORTUNITIES FOR ALL WORKGROUP

PRINCE GEORGE'S COUNTY, MD
FRIDAY, SEPTEMBER 24, 2021

MEETING OVERVIEW

MEETING PURPOSE

BY THE END OF THIS MEETING, WE WILL HAVE...

- A common understanding of the approach to the workgroup's final activities through March 2022.
- A common understanding of recent and long-standing housing trends in Prince George's County.
- A list of initial priorities to guide development of detailed housing production targets.

TODAY'S MEETING

AGENDA

- Presentation: Overview of 2021-2022 workgroup activities
- Presentation: Housing trends in Prince George's County
- Informing housing targets: Facilitated activity
- Next steps and wrap-up

TODAY'S MEETING

Q&A FOR GENERAL PUBLIC

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SUBMIT YOUR QUESTIONS

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OVERVIEW OF 2021-2022 WORKGROUP ACTIVITIES

CR 16-2019 & CR 21-2021 WORKGROUP'S CHARGE

- Assist the County in setting priorities and implementing its comprehensive housing strategy (*Housing Opportunity for All*).
- Provide advice on proposed legislation related to housing.
- Recommend possible changes to policies, programs, procedures, or resources related to housing.
- Inform the creation of a permanent stakeholder body to generate housing policy and resolve housing related issues.

DECISIONMAKING AMONG WORKGROUP MEMBERS

HOW WILL DECISIONS BE REACHED?

The workgroup will strive for **consensus** in its decision-making.

WHAT IS CONSENSUS?

“A consensus decision is one that **every member of the team** is willing to support and help implement.”

WHAT IF THE WORKGROUP CANNOT REACH CONSENSUS?

Members will default to **providing input** to the Enterprise Team and co-chairs to incorporate into the draft recommendations.

WORKGROUP'S CORE & ONGOING ACTIVITIES



HOUSING STAKEHOLDER ADVISORY GROUP



DETAILED HOUSING TARGETS
FOR PRINCE GEORGE'S COUNTY



IMPLEMENTATION OF PAST
WORKGROUP RECOMMENDATIONS

CORE
ACTIVITIES

ONGOING
ACTIVITY

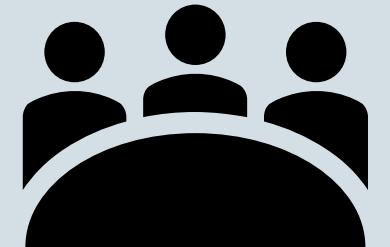
OBJECTIVE & WORKGROUP'S ROLE HOUSING TARGETS



OBJECTIVE

Develop a recommendation with two main parts:

- Numerical housing targets to achieve by 2030*
- Recommended tools to achieve the numerical housing targets



WORKGROUP ROLE

Inform priorities for more detailed housing targets.
Prioritize housing tools needed to achieve detailed targets.

**These targets will be developed within the housing targets set by the County Executive in her 2021 Economic Development Platform.*

KEY TASKS TO SUPPORT HOUSING TARGETS

Estimate detailed housing targets.

Collect background materials and information.

Develop methods.

Identify priorities to inform housing targets.

Create, vet and revise estimated housing targets.

Identify housing tools to achieve estimated housing targets.

Identify existing or potential housing tools related to the estimated targets.

Conduct engagement as needed.

Prioritize potential housing tools.

Draft recommendations.

Summarize workgroup's main points of agreement (as recommendations).

Vet and revise recommendations for workgroup's annual report.

**Tasks include those that will be completed to support workgroup conversations in between monthly meetings.*

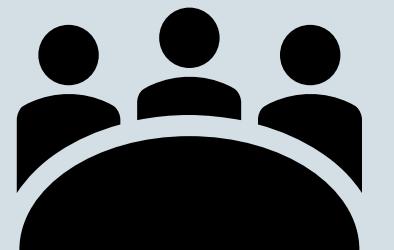
OBJECTIVE & WORKGROUP'S ROLE HOUSING ADVISORY GROUP



OBJECTIVE

Develop a recommendation that outlines the following for a permanent housing advisory group for Prince George's County:

- Responsibility & authority
- Role
- Structure
- Representation



WORKGROUP ROLE

Clarify purpose of a housing advisory group.
Agree on a housing advisory group model.
Agree on the key elements of the agreed-upon model.

KEY TASKS TO INFORM WORKGROUP HOUSING ADVISORY GROUP

Identify potential models for a housing advisory group.

Conduct background research (existing boards; legal authority).

Determine purpose of housing advisory group.

Vet and agree on potential housing advisory group model.

Define key elements of a housing advisory group.

Research key elements of agreed-on model.

Develop a proposal for the key elements.

Draft recommendations.

Summarize workgroup's main points of agreement (as recommendations).

Vet and revise recommendations for workgroup's annual report.

**Tasks include those that will be completed to support workgroup conversations in between monthly meetings.*

2021-2022 WORKGROUP ACTIVITIES

KEY MILESTONES TIMELINE

**September
2021**
Year 3 kickoff

**November
2021**
Agreement
on housing
advisory
group model

**January
2022**
Agreement
on housing
tools

Proposal of
housing
advisory
group
elements

March 2022
Final
workgroup
report

**October
2021**
Agreement
on criteria to
guide
housing
targets

**December
2021**
Estimated
housing
targets

**February
2022**
Draft
workgroup
report

**Housing Opportunities for All Workgroup to resume meeting monthly in September 2021; authorized to meet through March 2022.*

SCHEDULE WORKGROUP MEETINGS

Workgroup meeting	Meeting objective(s)
September 2021	<ul style="list-style-type: none">• Build a common understanding of Year 3 activity: informing detailed housing targets (approach, role, tasks).• Build a common understanding of Year 3 activity: informing a housing advisory group (approach, role, tasks).• Develop initial list of priorities to guide housing target estimates.
October 2021	<ul style="list-style-type: none">• Agree on priorities to guide detailed housing target estimates.
November 2021	<ul style="list-style-type: none">• Build a common understanding of potential housing advisory group models available to Prince George's County.• Agree on a housing advisory group model to develop further.
December 2021	<ul style="list-style-type: none">• Build a common understanding of the estimated housing targets.• Build a common understanding of potential housing tools (methods) to achieve these targets.• Generate a proposal for a housing advisory group model.
January 2022	<ul style="list-style-type: none">• Generate a list of priority housing tools to meet estimated housing targets.
February 2022	<ul style="list-style-type: none">• Generate a list of initial adjustments to recommendations for housing targets & housing advisory group.
March 2022	<ul style="list-style-type: none">• Generate a list of final adjustments to recommendations for housing targets & housing advisory group.

Q&A FOR GENERAL PUBLIC

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HOUSING TRENDS A SNAPSHOT TO GROUND ACTIVITIES

SUMMARY OF KEY FINDINGS: CONTINUED TRENDS

Housing Opportunity for All documented trends that have continued to shape Prince George's County's housing landscape through 2019.

These trends include:

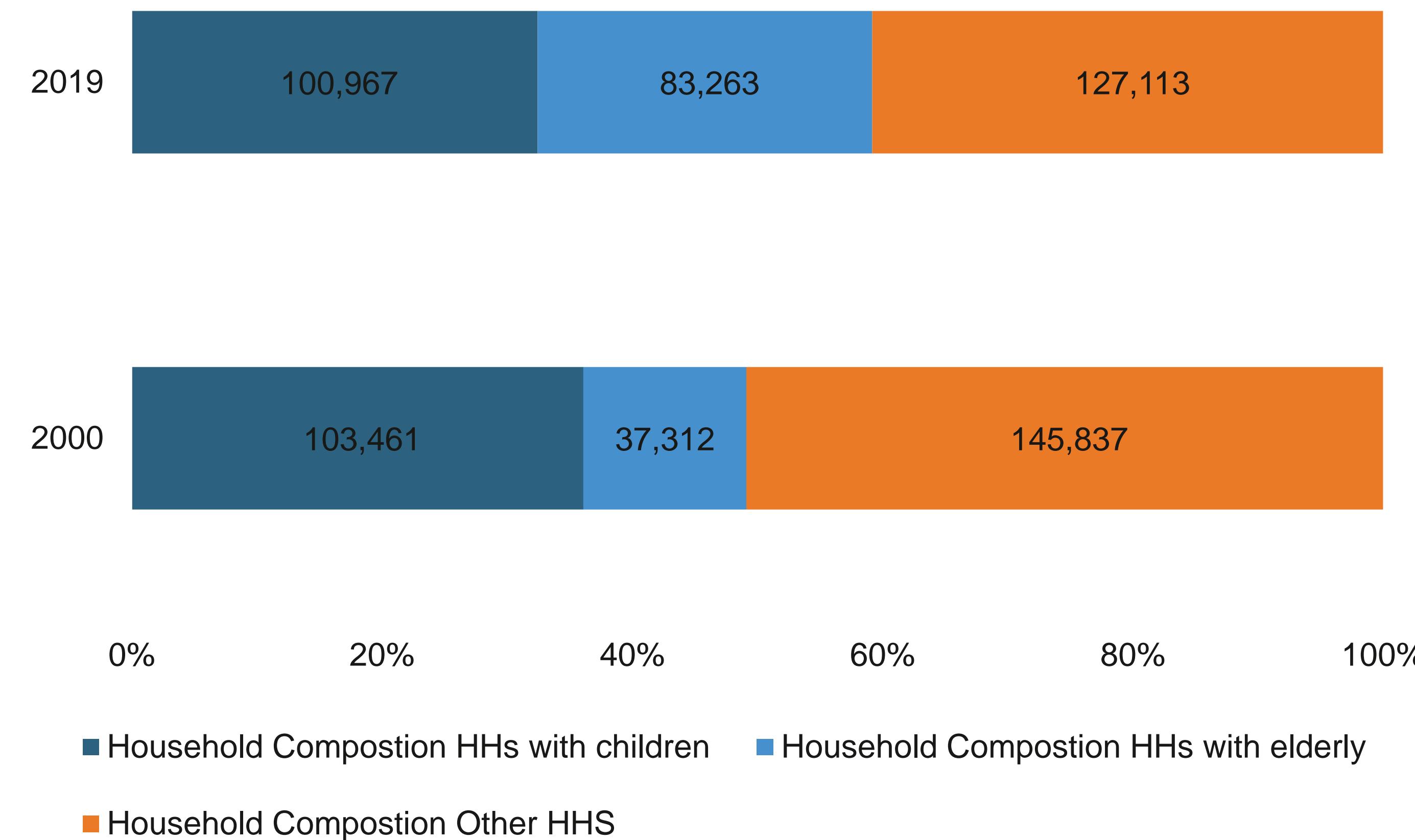
- More one-person households
- Larger households (based on average household size)
- More households in the lowest (up to 30 percent AMI) and highest income categories (more than 100 percent AMI)
- Losses among households earning between 50 and 100 percent AMI
- Relevance of single-family homes as the county's primary housing type (67 percent).
- Loss of housing diversity (including 2,270-unit decline in small and medium multifamily units)
- Households living in inadequate housing conditions by HUD's standards, with cost-burdened households accounting for almost half (46 percent) of these conditions.

CONTINUED TRENDS: HOUSEHOLD CHARACTERISTICS

Between 2000 and 2019...

- The homeownership rate remained constant at 62 percent.
- The average household size grew from 2.71 to 2.84.
- There has been a decline in one-bedroom units and efficiencies and an increase in units with two or more bedrooms.

Household Composition, Prince George's County (2000 - 2019)



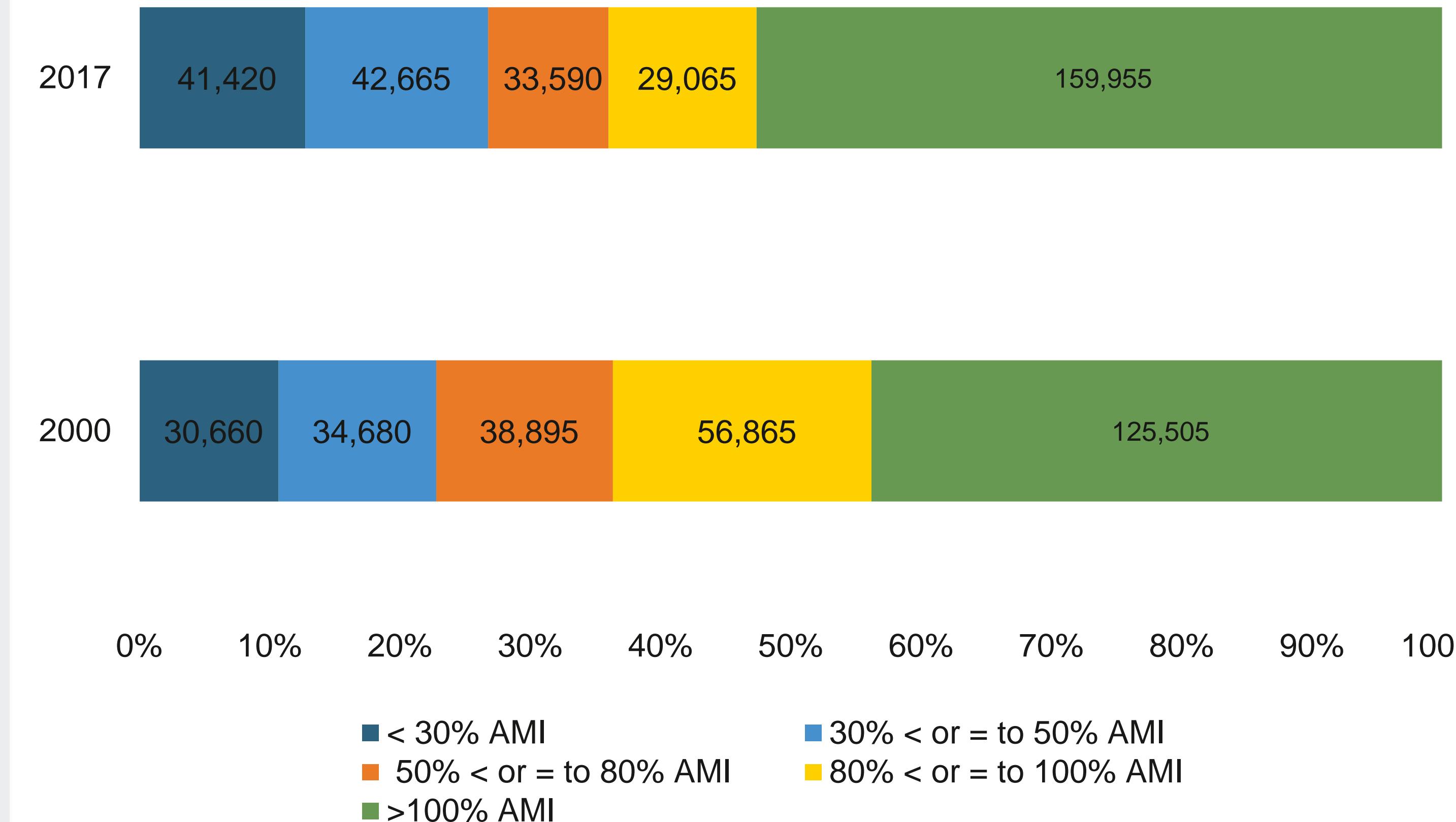
SOURCE: CENSUS 2000 SF3, 2019 5YR

CONTINUED TRENDS: HOUSEHOLD INCOME GROUPS

Between 2000 and 2017...

- Households with either lower incomes or higher incomes grew, while households with incomes between 50 and 100 percent AMI declined.
- More than one-quarter (28 percent) of households have an annual income less than or equal to 50 percent AMI.

Household Income as a Percent of Area Median Income (AMI) Prince George's County (2017)



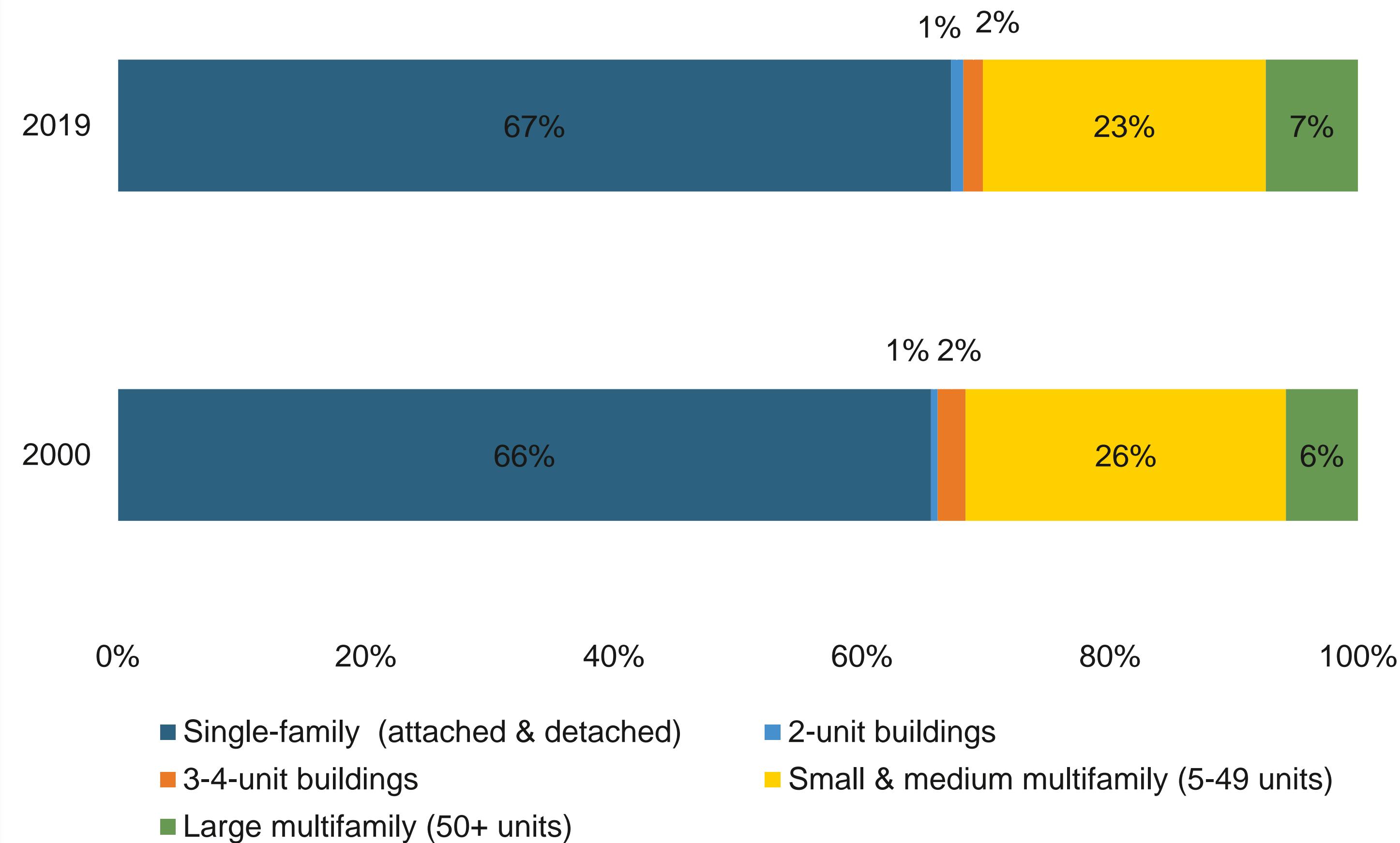
SOURCE: HUD CHAS 2000 & 2017

CONTINUED TRENDS: HOUSING TYPE

There has been a rise in single-family homes and loss of multifamily homes.

- Most homes (67 percent) in Prince George's County are single family (attached & detached), as of 2019.
- From 2000 to 2019, small and medium multifamily units (5-49 units) have declined in total number and share (a loss of 2,272 units).

Housing Units in Structure, Prince George's County (2000 - 2019)



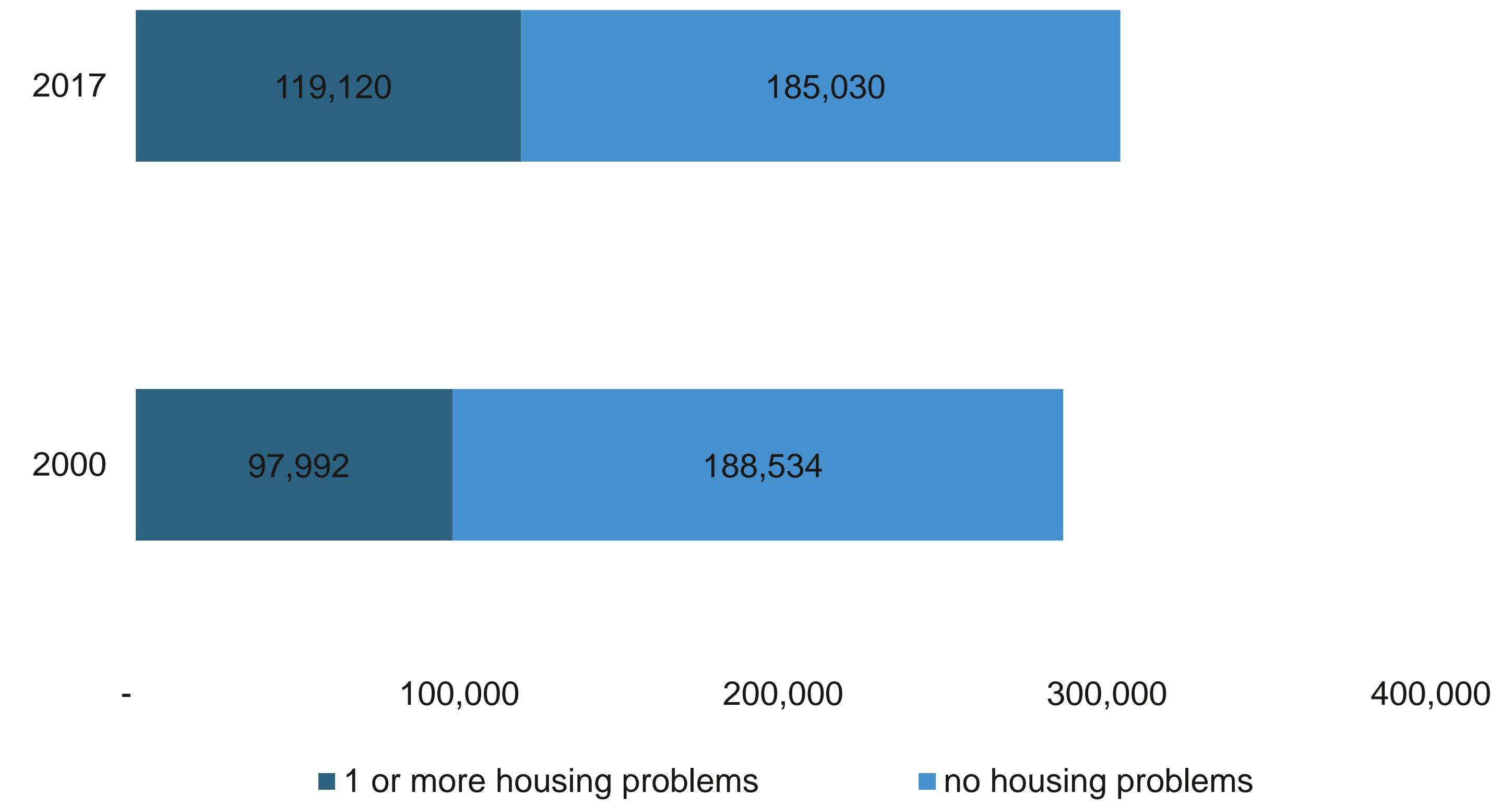
SOURCE: CENSUS 2000 SF3, 2019 5YR

CONTINUED TRENDS: HOUSING QUALITY

Households in Prince George's County continue to face housing quality and stability challenges.

- Both the number and proportion of units with more than one HUD-defined housing problem have increased since 2000.
- As of 2017, over 119,000 households (39 percent of all households) live in inadequate conditions.

Inadequate Housing, Prince George's County (2009 - 2016)



SOURCE: HUD CHAS 2000 & 2017

SUMMARY OF KEY FINDINGS: EMERGING TRENDS

Since 2000, two main trends have emerged in Prince George's County, related to changes in household income and overall housing production.

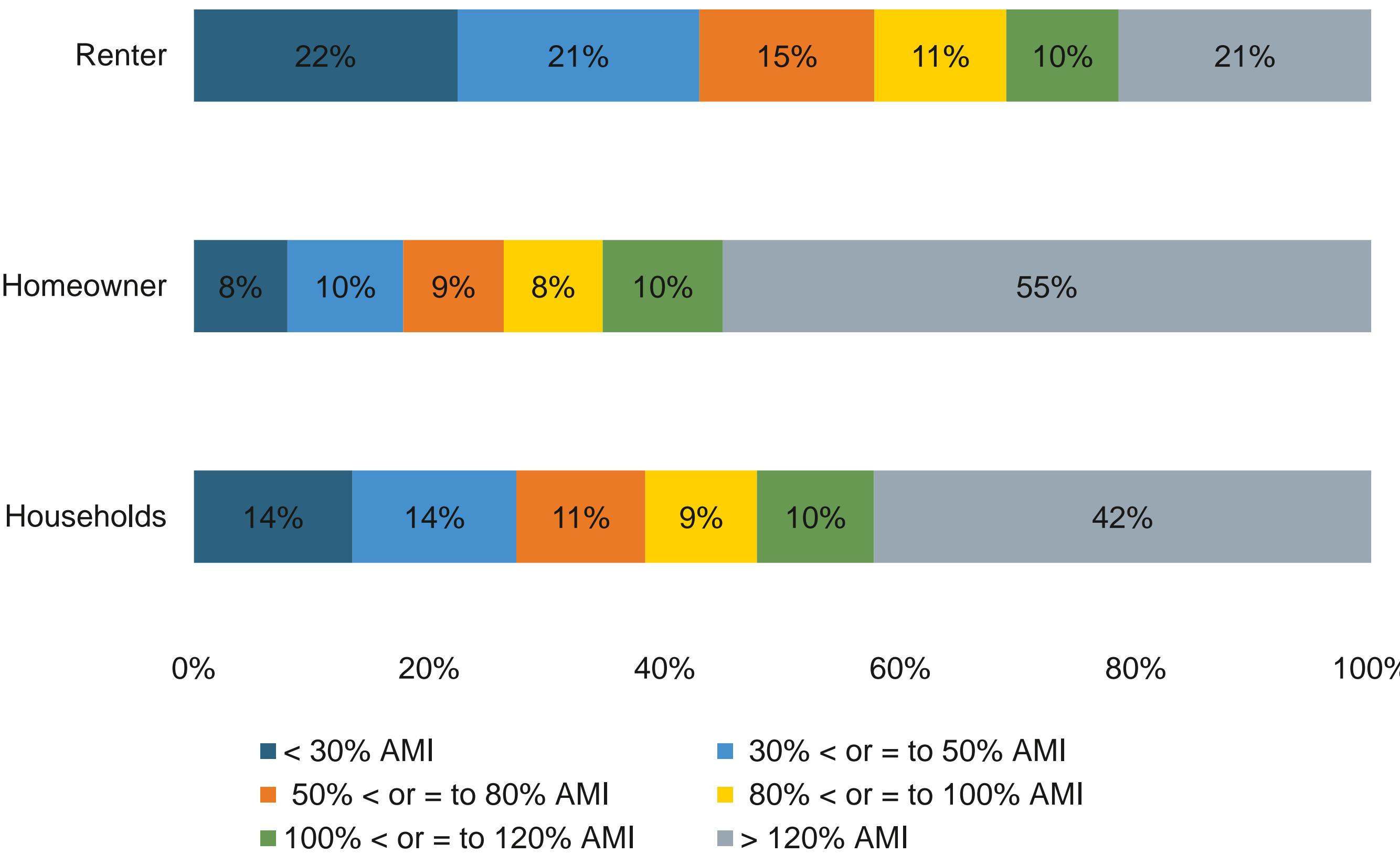
These trends show differences in what was found in *Housing Opportunity for All*, meaning they likely occurred in the last few years (pre-pandemic).

- Household income largely kept pace with median rent from 2014 to 2019, while median home value slightly outpaced the slight gain in household income. *Housing Opportunity for All* showed a slight decline in household income (-1 percent) and more significant gains in rents (29 percent) and homes value (30 percent).
- Housing production has largely kept pace with overall gains in households (9 and 8 percent, respectively).
- *Housing Opportunity for All* showed construction primarily driven by single-family homes, and new homes still tend to be single-family ones. However, Prince George did experience two large spikes in multifamily construction in 2017 and 2020, suggesting more variation in recent years.

EMERGING TRENDS: HOUSEHOLD INCOME

- From 2014 to 2019, median household income rose by 7 percent (in 2019-inflation adjusted dollars).
- This increase has kept pace with the median rent which increased by 7 percent during the same period.
- Renters are more likely to have incomes in the lower-income categories than homeowners.

Household Income as a Percent of Area Median Income (AMI) Prince George's County (2017)



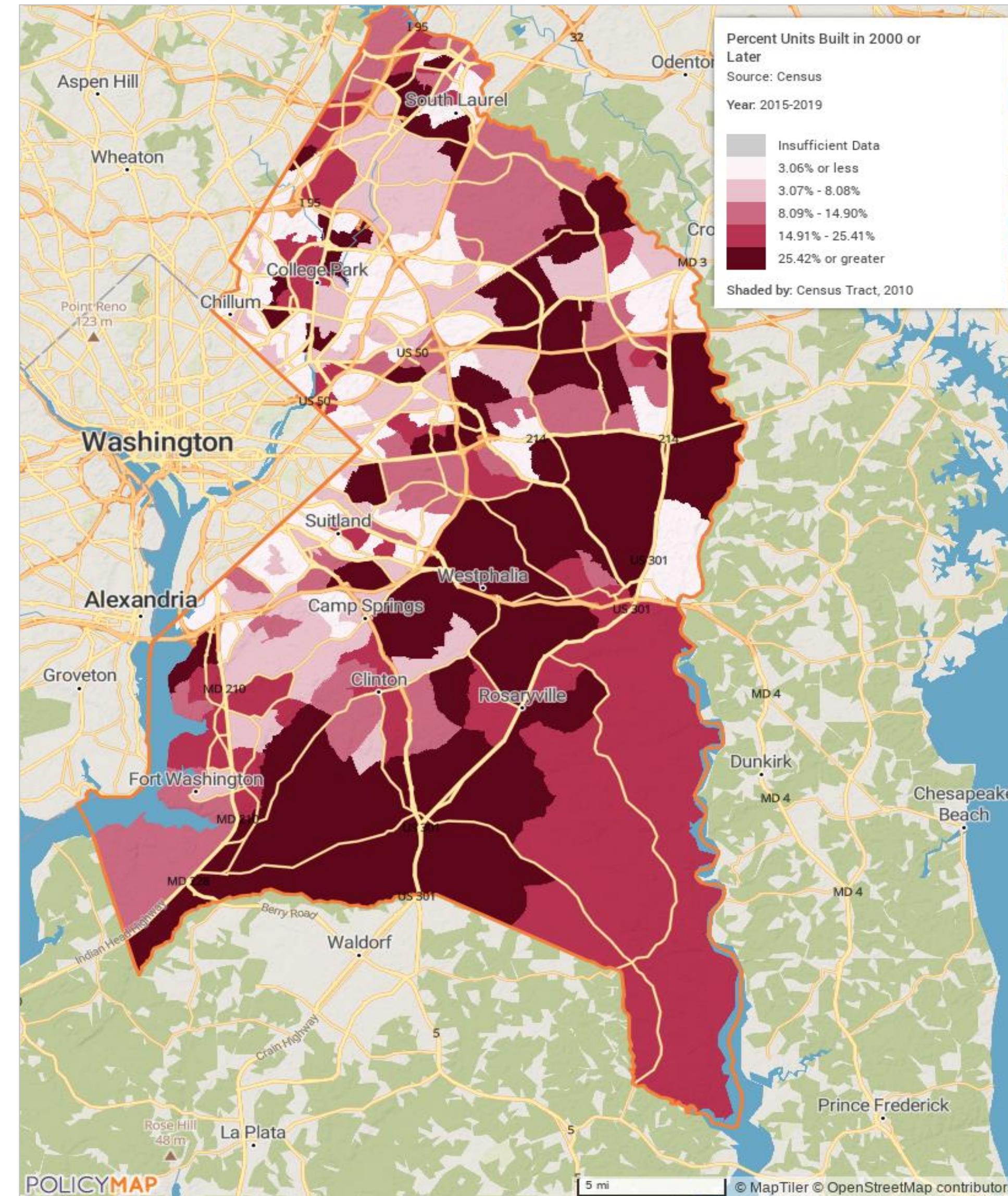
SOURCE: HUD CHAS 2017

HOUSING TRENDS

EMERGING TRENDS: HOUSING STOCK

- From 2000 to 2019, housing units grew by 9 percent, while total households in the county grew by 8 percent.
- Around 15 percent of the county's existing housing stock was built after 2000.
- Growth in homes has been due to single-family production, with spikes in multifamily development in both 2017 and 2020.

Percent of Housing Built in 2000 or Later by Census Tract Prince George's County (2017)

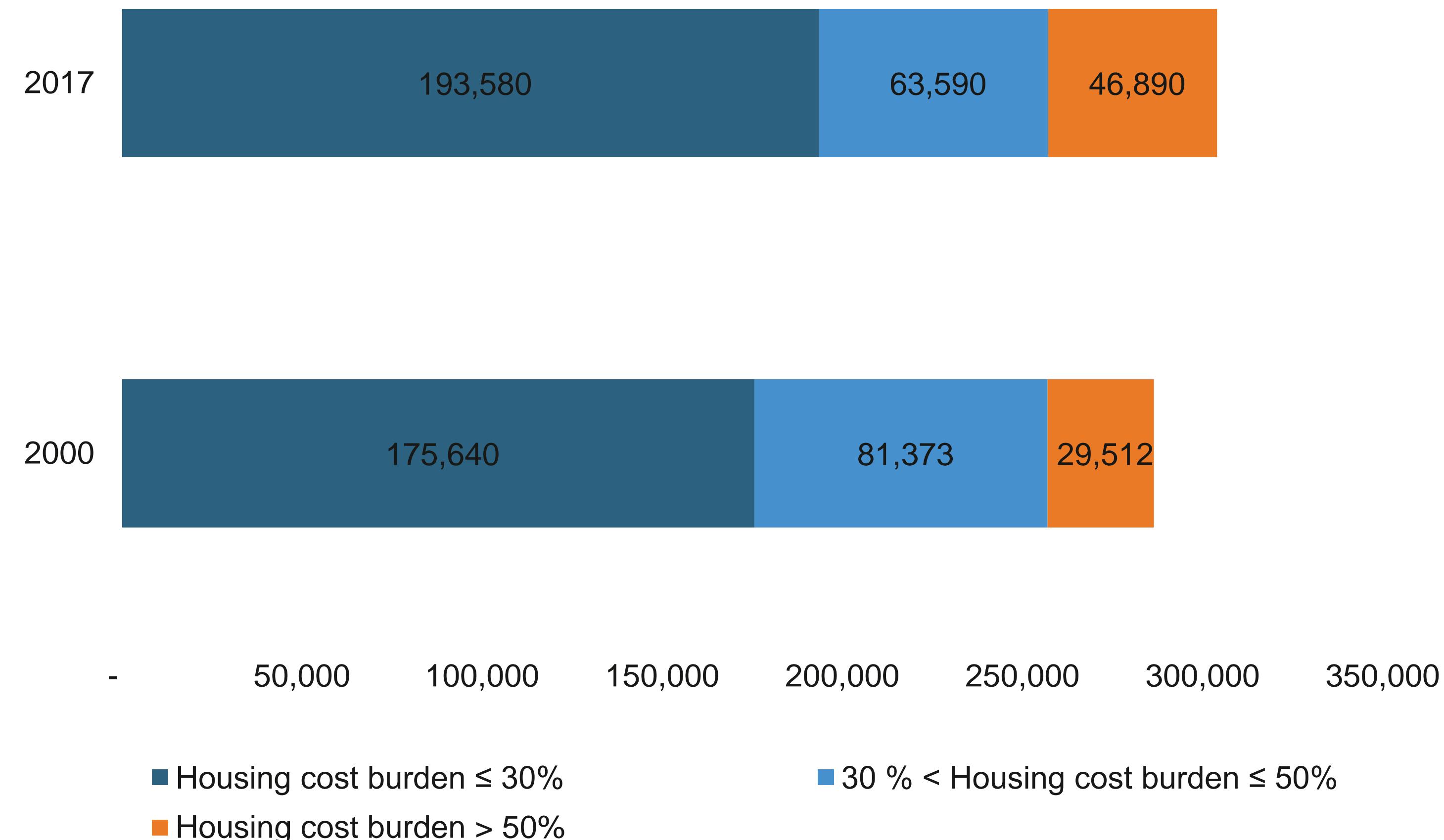


COST BURDEN TRENDS

EMERGING TRENDS: HOUSING AFFORDABILITY

- The share and number of households experiencing cost-burdens in Prince George's County has declined since 2000.
- Even while cost-burdens households decreased overall, the severity of cost-burdens among households in the county have increased.
- Severely cost-burdened households grew by 37 percent (or 17,738 new households) between 2000 and 2017.

Cost burdens among households
Prince George's County (2000 & 2017)



SOURCES: HUD CHAS 2000 & 2017

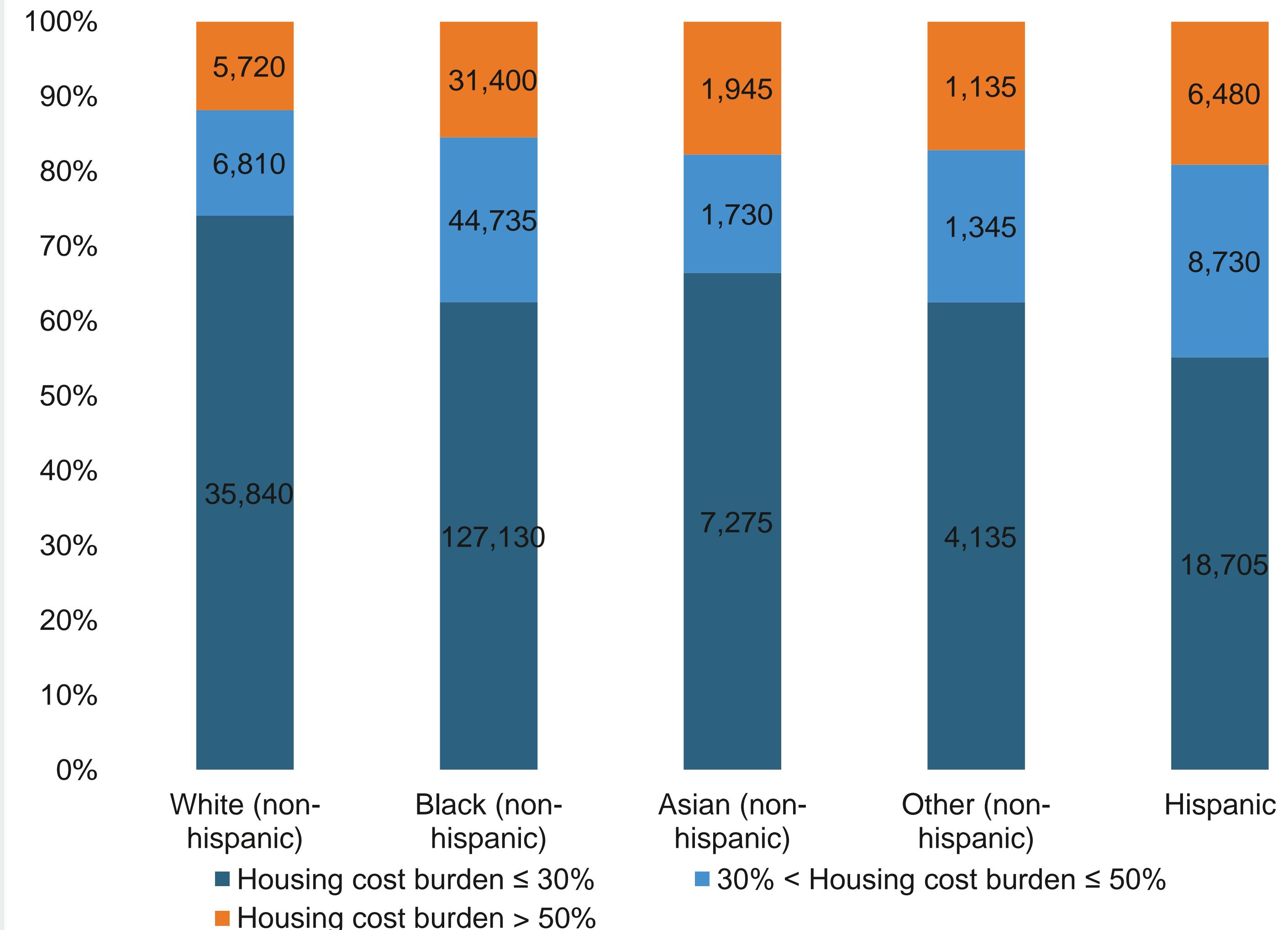
HOUSING TRENDS

HOUSING NEEDS: RACE AND ETHNICITY

Hispanic households face higher housing costs than other racial or ethnic groups in Prince George's County.

- Hispanic households' median household income is 24 percent lower than the county median household income, despite a 6 percent increase from 2014 to 2019.
- 45 percent of Hispanic households are paying more than 30 percent of their income on monthly housing costs, compared to 36 percent of households countywide.

Housing Cost Burden by Race and Ethnicity Prince George's County (2017)



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INFORMING HOUSING TARGETS

HOUSING TARGETS

PRINCE GEORGE'S COUNTY ECONOMIC DEVELOPMENT PLATFORM

GOAL 4

Preserve housing affordability and diversify the County's housing stock.

- Supporting the production of 26,000 new residential units, 75% of which would be committed as affordable to households with income less than 120% of the area median.
- Supporting the preservation of 6,000 affordable residential units.
- Increasing the number of new multifamily construction starts by 10,400 by 2030.

COMPLEMENTARY GOALS

PRINCE GEORGE'S COUNTY ECONOMIC DEVELOPMENT PLATFORM

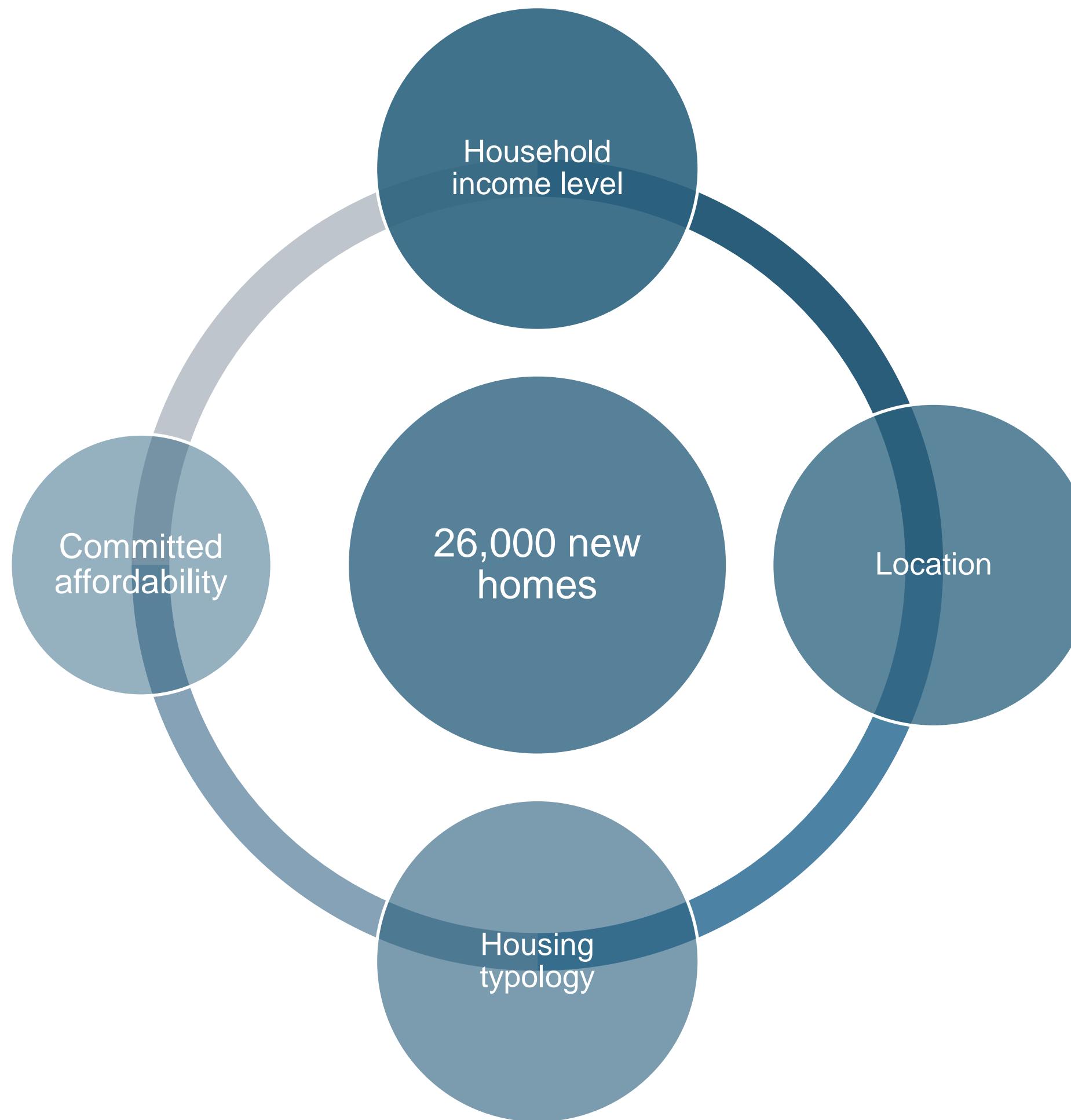
GOAL 1

Increase the number of people who live and work in the county.

GOAL 3

Increase the population by 50,000 and increase density in transit-oriented development areas (Metro, MARC, Amtrak, Purple Line) and other local growth centers to promote a mix of incomes, housing options, amenities, and job growth.

GUIDING FRAMEWORK: HOUSING PRODUCTION



- **COMMITTED AFFORDABILITY:**
19,500 new units
- **INCOME LEVEL:**
Up to 120 percent AMI for new committed affordable units
- **LOCATION:**
Transit-oriented development
- **HOUSING TYPOLOGY:**
10,400 new multifamily construction starts

GUIDING FRAMEWORK: KEY TERMS

New unit

Newly constructed residential unit that did not exist prior to 2021.

New, committed affordable unit

Newly constructed residential unit that did not exist prior to 2021 and is guaranteed to remain affordable to income-eligible households for a set period through an agreement with a governmental entity (local, state, or federal).

Multifamily development

Refers to buildings with 3+ units (based on Prince George's County existing multifamily licensing requirements). Other definitions tend to categorize buildings with 5+ units as "multifamily."

INFORMING HOUSING TARGETS

GUIDING FRAMEWORK: HOUSING PAYMENTS BY INCOME

Area median income (AMI) category	Annual household income: Three-person income	Affordable Rent Level
Extremely low income (30 percent AMI)	\$34,850	\$875
Very low income (50 percent AMI)	\$58,050	\$1,451
Low income (80 percent AMI)	\$74,100	\$1,852
Median income (100 percent AMI)	\$116,100	\$2,905
Above median income (120 percent AMI)	139,400	\$3,485

SOURCES: FY 2021 FAIR MARKET RENT (FMR) FOR THE WASHINGTON-ARLINGTON-ALEXANDRIA AREA AND ENTERPRISE COMMUNITY PARTNERS.

INFORMING HOUSING TARGETS

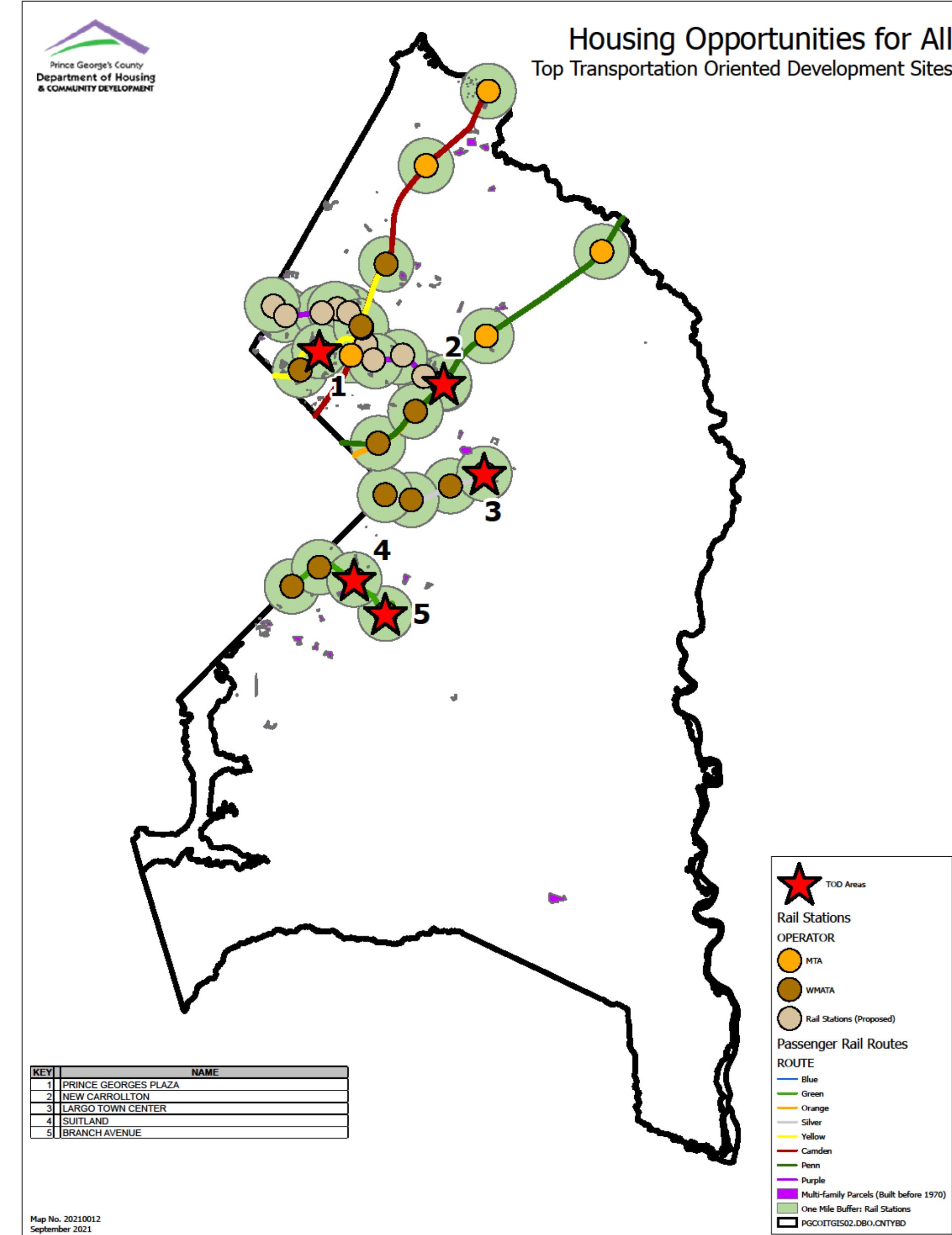
GUIDING FRAMEWORK: LOCATION

Metro stations:

Suitland
Branch Avenue
New Carrollton
Greenbelt
College Park
Largo
Prince George's County Plaza
Other Metro station areas

Purple Line

MARC



GUIDING FRAMEWORK: INTENDED USES

- Enable consistent measurement and reporting.
- Create accountability in ongoing program and policy implementation.
- Inform and evaluate ongoing program and policy implementation (including adjustments).
- Highlight new or expanded ways to meet housing & economic development goals.
- Make the case for new or expanded housing tools.

INFORMING HOUSING TARGETS

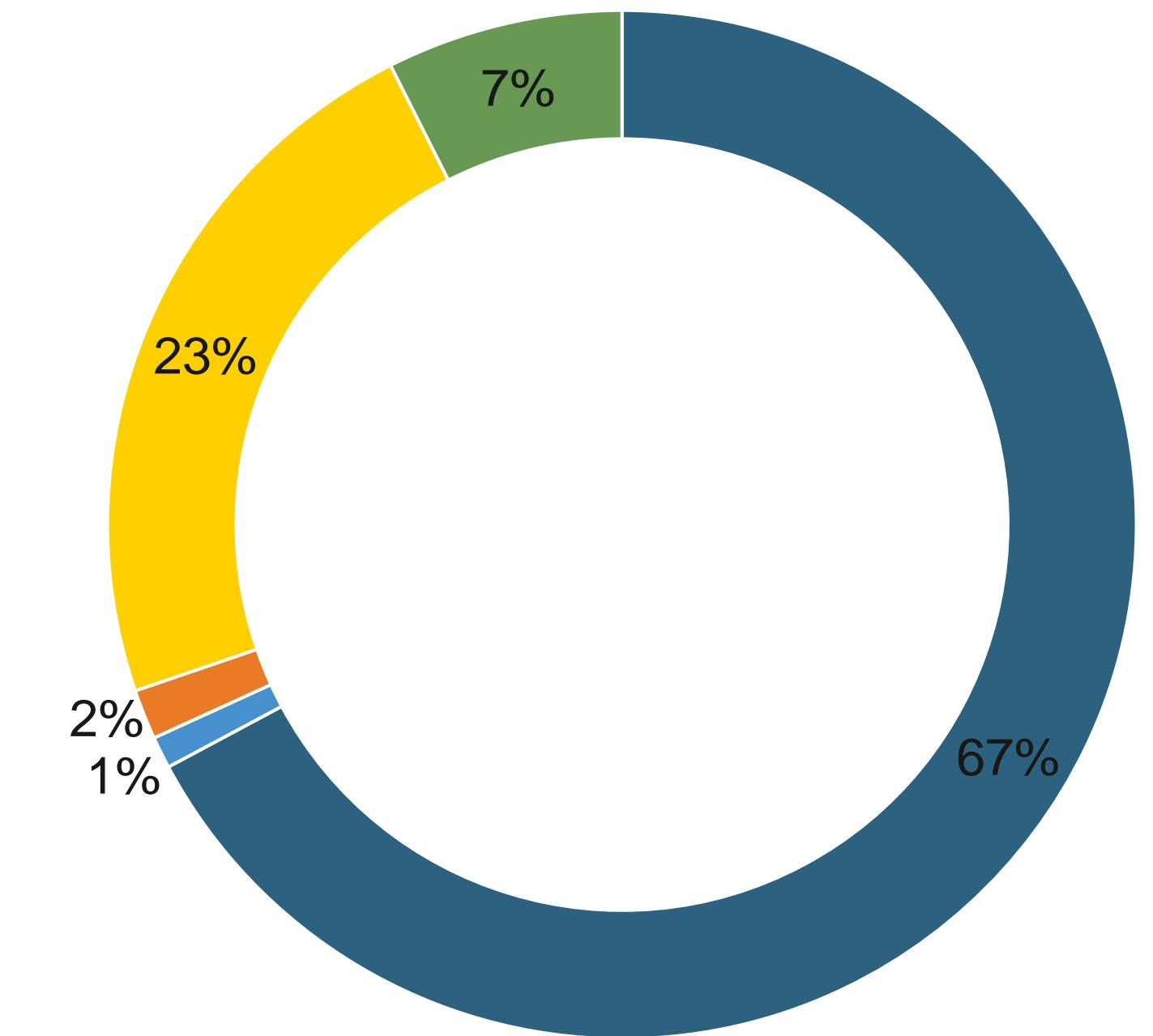
GUIDING FRAMEWORK: HOUSING TYPES

One part of the overall goal is to increase new multifamily construction starts.

As of 2019, 30 percent of Prince George's County's housing supply were multifamily (5+ units) properties.

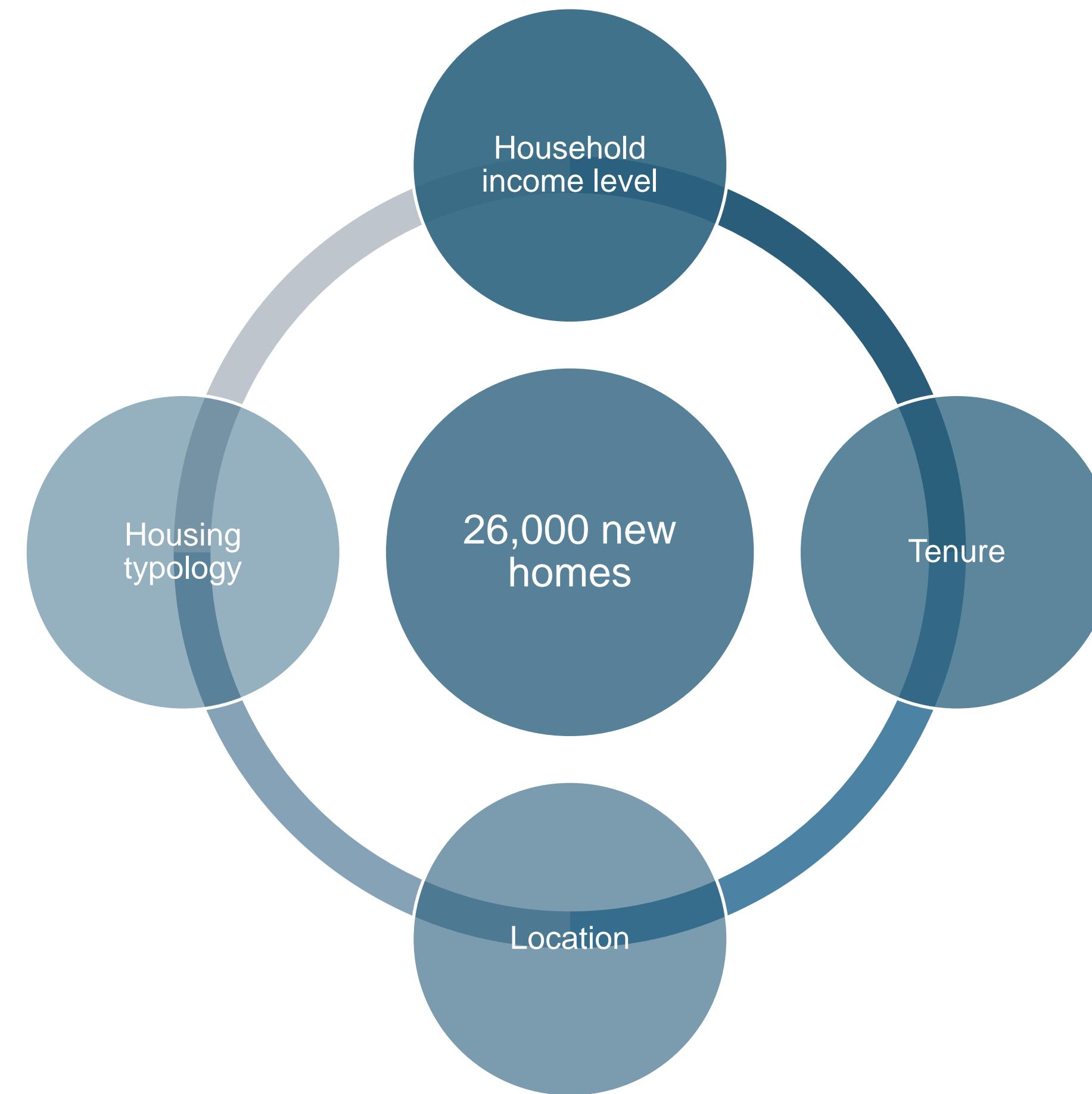
There's a need for "missing middle" homes to add variety to the county's housing supply.

- Single-family (attached & detached)
- 2-unit buildings
- 3-4-unit buildings
- Small & medium multifamily (5-49 units)
- Large multifamily (50+ units)



SOURCES: AMERICAN COMMUNITY SURVEY FIVE-YEAR ESTIMATES, 2015-2019.
GRAPHIC VIA OPTICOS.DESIGN.

GUIDING FRAMEWORK: PARAMETERS | PRODUCTION



- **INCOME LEVEL:** How should new committed affordable units be allocated across the income spectrum (for households earning up to 120 percent AMI)?
- **TENURE:** How should overall production, including committed affordable units, be allocated by tenure?
- **LOCATION:** Among the locations identified, which are priorities for overall production? Committed affordable units?
- **HOUSING TYPOLOGY:** Are there specific types of multifamily development that are priorities to achieve as new construction occurs?.

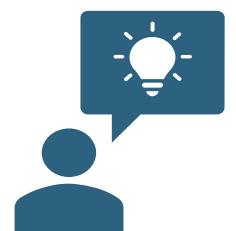
ACTIVITY PRELIMINARY PRIORITIES

LARGE-GROUP ACTIVITY: PRELIMINARY PRIORITIES

OUR DISCUSSION

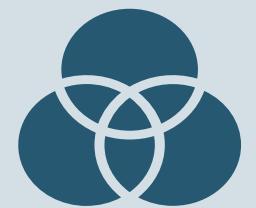
PURPOSE:

*Generate a list of priorities for key housing targets parameters.
Identify any additional parameters to consider as priorities.*



SHARE INDIVIDUAL PRIORITIES FOR EACH PARAMETER.

Individual responses will be collected through a series of flash polls.



IDENTIFY COLLECTIVE PRIORITIES FOR EACH PARAMETER.



GENERATE A PRELIMINARY SET OF PRIORITIES FOR HOUSING TARGETS.

This set of priorities will be vetted further at the next workgroup meeting and eventually guide more detailed housing target estimates.

ALL NEW UNITS PRELIMINARY PRIORITIES

PRELIMINARY PRIORITIES

ALL NEW UNITS TENURE



FLASH POLL QUESTION

Of the 26,000 new units built by 2030, how many of them should be rental homes? Homeownership units?

WORKGROUP MEMBERS

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AUDIENCE MEMBERS

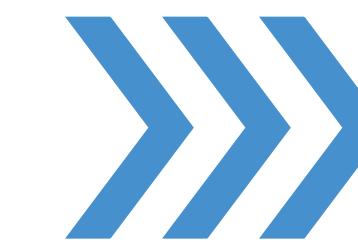
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In this poll, treat “points” as “shares.” Allocate points to show total share for tenure.

PRELIMINARY PRIORITIES

ALL NEW UNITS LOCATION



FLASH POLL QUESTION
Of the 26,000 new units built by 2030,
what transit stations should be priorities for the location
of these homes?

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AUDIENCE MEMBERS
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PRELIMINARY PRIORITIES

ALL NEW UNITS HOUSING TYPE

One part of the overall goal is to increase new multifamily construction starts.

Thirty (30) percent of the county's housing supply was multifamily buildings (5+ units), as of 2019.

There's a need for "missing middle" homes to add variety to the county's housing supply.



FLASH POLL QUESTION

Of the 26,000 new units built by 2030, what types of homes should be priorities?

WORKGROUP MEMBERS

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AUDIENCE MEMBERS

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PRELIMINARY PRIORITIES

ALL NEW UNITS WHAT ELSE?



FLASH POLL QUESTION

What additional parameters (if any) should be included as we set more detailed housing targets for all new units?

WORKGROUP MEMBERS

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AUDIENCE MEMBERS

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NEW COMMITTED AFFORDABLE UNITS PRELIMINARY PRIORITIES

PRELIMINARY PRIORITIES

NEW COMMITTED AFFORDABLE UNITS INCOME

One part of the overall goal is to ensure 19,500 new units are affordable to households at 120 AMI or below.

For every 100 extremely low-income renters, 23 units are affordable and available.

A 3-person extremely low-income household could afford a maximum housing payment of \$875 a month. Local and state stakeholders have consistently affirmed a need for deeper affordability for these households.

FLASH POLL QUESTION

Of the 19,500 new committed affordable units built by 2030, how many should be built for different income levels (up to 120 AMI)?



WORKGROUP MEMBERS

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AUDIENCE MEMBERS

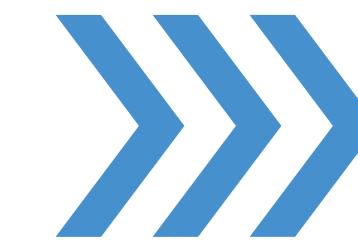
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In this poll, treat “points” as “shares.” Allocate points to show total share for each income level.

PRELIMINARY PRIORITIES

NEW COMMITTED UNITS TENURE



FLASH POLL QUESTION

Of the 19,500 new committed affordable units built by 2030,
how many of them should be rental homes?
Homeownership units?



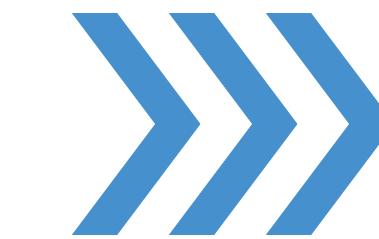
WORKGROUP MEMBERS
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AUDIENCE MEMBERS
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In this poll, treat “points” as “shares.” Allocate points to show total share for tenure and affordability.

PRELIMINARY PRIORITIES

NEW COMMITTED UNITS LOCATION



FLASH POLL QUESTION
Of the 19,500 new committed affordable units built by 2030,
what transit stations should be priorities for the location
of these homes?



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AUDIENCE MEMBERS
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PRELIMINARY PRIORITIES

NEW COMMITTED UNITS HOUSING TYPE

One part of the overall goal is to increase new multifamily construction starts.

Thirty (30) percent of the county's housing supply was multifamily buildings (5+ units), as of 2019.

There's a need for "missing middle" homes to add variety to the county's housing supply.

FLASH POLL QUESTION
Of the 19,500 new committed affordable units built by 2030, what types of homes should be priorities?



WORKGROUP MEMBERS

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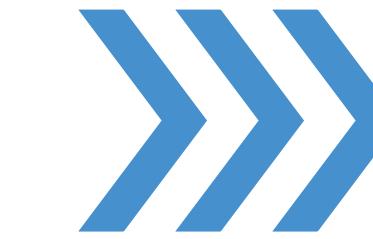


AUDIENCE MEMBERS

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NEW COMMITTED UNITS WHAT ELSE?



FLASH POLL QUESTION

What additional parameters (if any) should be included as we set more detailed housing targets for new committed affordable units?

WORKGROUP MEMBERS

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AUDIENCE MEMBERS

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NEXT STEPS & WRAP-UP

NEXT STEPS & WRAP-UP

OCTOBER WORKGROUP MEETING

DATE & TIME

FRIDAY, OCTOBER 22, 2021 | 10.30-12.30 PM

MEETING PURPOSE

Agree on priorities for detailed housing target estimates (income, tenure, location, and type).

DISCUSSION TOPICS

- Preliminary priorities (based on input from today's meeting)
- Outstanding priorities to define (based on input from today's meeting)
- Other parameters to use (pending OK from co-chairs)