



SOUTHWEST LRT
community works

green means go.

connecting people to jobs, housing, shopping, and fun

Housing Gaps Analysis Update

Southwest Corridor

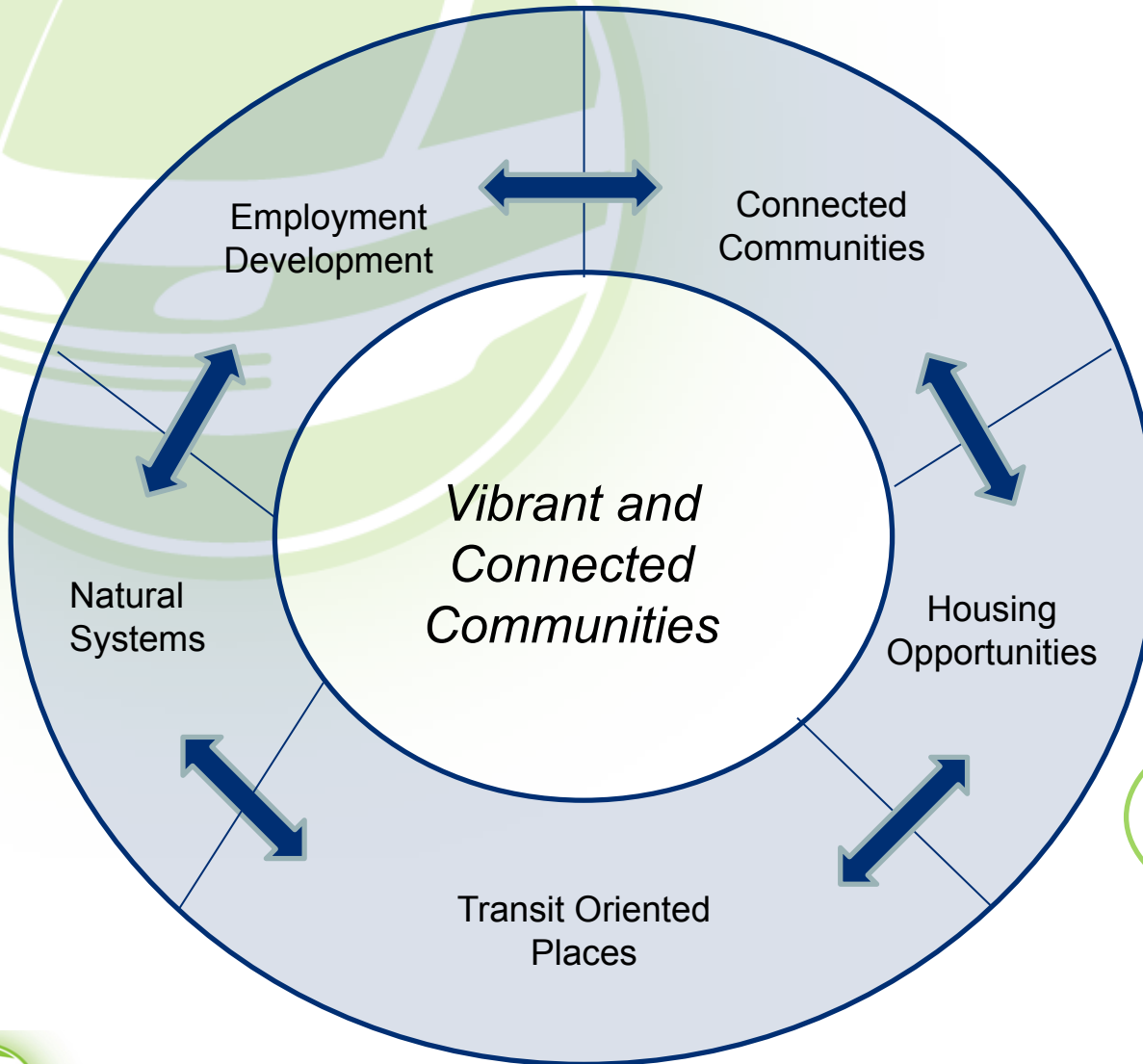
Community Works Steering Committee

September 18, 2014

Marquette Advisors
Real Estate Consultants



Southwest Community Works



Corridor-wide Housing Strategy

- Inventory
- Gaps Analysis
- Strategy



Southwest Corridor-wide Housing Strategy Workplan

endorsed by Southwest Community Works Steering Committee, May 2012

Workplan Components

Housing Inventory

Completed March 2013
Data incorporated in
Investment Framework

Market Feasibility

Contained in Investment
Framework (2013) and Gaps
Analysis (2014)

Gaps Analysis

In process, final report due Fall
2014

Strategy & Goals

To be completed – 1st quarter
2015

SW Community Works Guiding Principles for Investment:

Provide a full range of housing choices

Inventory

- What is present today?

Gaps Analysis

- What are the gaps between what exists, what will be the projected demand and its market feasibility?

Strategy

- Market feasibility + housing policy goals
- How do we get there?



Funding Partners



\$50,000



\$25,500



\$10,000



\$5,000



Inventory Key Findings

Younger & Older Demographics are attracted to the SW Cities & LRT.

SW Corridor is job rich.

Limited rental housing options within ¼ mile of proposed stations

Large Supply of “naturally occurring” affordable housing (unsubsidized rental) - but much of it tends to be older

Development pipeline is led by the luxury sector.



Gaps Analysis Scope

What housing types and values are missing from the Corridor?

What are the strengths and weaknesses along the SWLRT line?

Where are there optimal sites for housing development within ¼ mile of station areas?

Where is there greatest risk of gentrification?

What tools and strategies will be most useful in achieving the goal of a full range of housing choices?



Stakeholder Engagement

- ❖ For-profit developers
- ❖ Non-profit developers
- ❖ Funders/Land Banks/Land Trusts
- ❖ Advocacy and community groups
- ❖ School organizations
- ❖ City housing and planning staff
- ❖ Other partners

100+
individuals
provided
input to the
Gaps
Analysis

Report Framework

- **Assessment of Prior Research**
- **SW LRT Residential Development Outlook**
- **Residential Development Assessment by Station Area**
- **Housing Preservation**
- **Conclusions and Recommendations**
 - Analysis of market inefficiencies
 - Expected demand – supply gaps
 - Strategies for mitigating barriers to development of various housing products

Population and Household Growth

Today

- ❖ Currently, the **majority of corridor households are renters** and that trend is likely to continue.
- ❖ **Young renters are drawn to multifamily housing** products in urban and well-sited suburban areas.

In the Future

- ❖ **As Millennials (25 – 34) age**, they may look for “urban” housing outside of Downtown and Uptown.
- ❖ **Aging Baby Boomers** will seek out more “efficient” living arrangements.



Key findings:

- ❖ Between 2010 and 2020, 80+% of household growth is expected to consist of **households without children.** (Met Council)
- ❖ Growing segments of the population will show a strong preference for urban housing – **primarily high-density multifamily residential.**



Tower Light, Wooddale Station

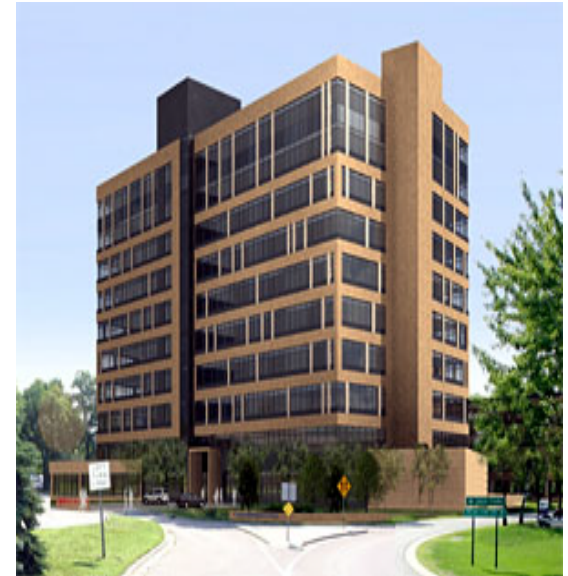


Rendering of the ARTery, Downtown Hopkins Station

Employment

Key findings:

- ❖ High employment creates **strong market demand for a full range of housing product types** at all affordability levels.
 - **Concentration of well-paying jobs** in the information, finance and professional services.
 - Health care/social assistance and manufacturing - also strong.
 - **Lower-paying sectors** – entry-level support, clerical, maintenance, retail/restaurant workers.
 - **20% of persons employed within ½ mile earn < \$1,250/month.**
 - Single-worker household at this level can afford \$375 monthly housing cost.
 - If 2 workers in household, can afford only \$750/month.
- ❖ **Variation by station area** - numbers of workers and earnings. A key factor in development recommendations by station area.



United Health Group campus

Educational Facilities

- ❖ **Opportunities for open enrollment** with new access by LRT.
- ❖ New housing development within ½ mile of SW LRT stations is **unlikely to have substantial impact on student enrollment.**

Key finding: Workforce and market-rate rental; entry-level for-sale housing may be attractive to **teachers and school staff** due to a current **affordability gap** between salaries and corridor housing costs.



Residential Development Outlook

Key finding:

Market demand = 13,000 – 15,000 new units

(Gap between existing units and # of households who will want to live along the corridor)

Feasible supply = 11,000 new units

(Due to constraints: land availability, land use, development cost factors, etc)

(However, at least 20% of these units still not feasible but for public/private partnerships and gap financing)

To reach these levels and increase more affordability at certain locations will require *creative public/private partnerships, substantial subsidy & strong policy leadership.*

Residential Development Outlook

- ❖ **Feasibility of 11,000 units at various price points is tempered** - reflects realities of the market, land use and development challenges.
- ❖ **Mix of rental housing by affordability range** - general occupancy and senior rentals.
- ❖ **Mix of home ownership products** - for-sale condos, townhomes, row homes, and single family “pocket neighborhood” product types.



Hamline Station – St. Paul



High-Density Single Family Homes – “Pocket Neighborhood Design” – Seattle, WA

Recommendations and Assumptions

11,000 new units over the next 15+ years

- **New unit mix** - 90% rental, 10% home ownership
Why? Considers demographics, economics and lifestyle factors.
- **12%** (1,300 units) - <60% AMI
- **9%** (1,000 units) - 61% to 80% AMI
- **12%** (1,300 units) – 81% to 100% AMI
- Station Area recommendations for new construction take into account the following factors:
 - Current housing inventory, demographic composition and economic base
 - Land availability - ownership of undeveloped and/or under-utilized parcels
 - Characteristics of surrounding land use (as-is and future expectations)
 - Proximity to jobs, types of jobs & incomes levels, proximity to goods/services, public and educational facilities and other modes of transit

Recommendations and Assumptions

Key finding: In all cases, mixed-income residential development is considered a “best practice” related to inclusionary housing in the corridor.

- Publicly owned sites present the best short-term opportunity for this type of development.



Gallery Flats, Downtown Hopkins Station



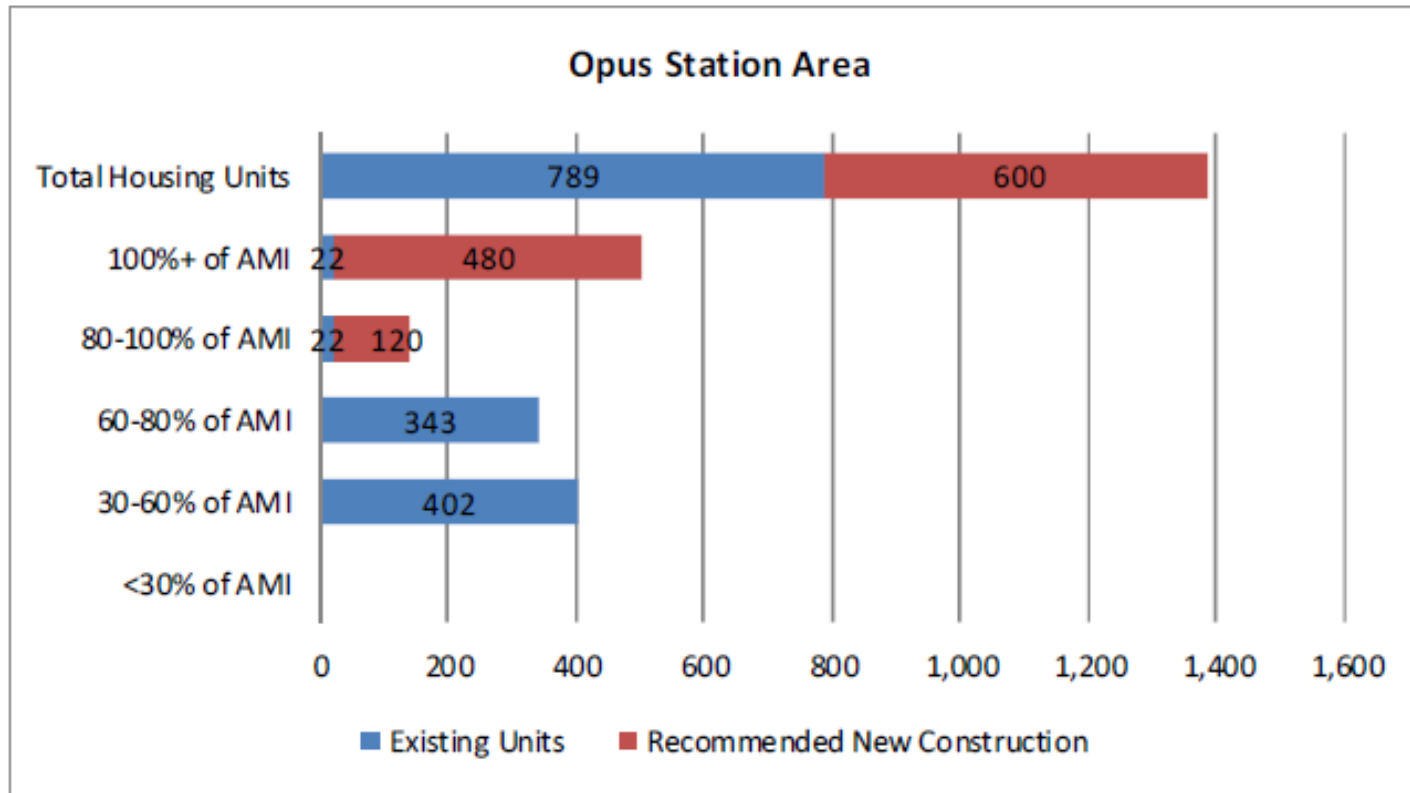
Beachside, Opus Station area

Residential Development Assessment by Station Area

- ❖ Draws on data/maps provided in **TSAAP/Investment Framework**
- ❖ Details **current area housing supply**
- ❖ Outlines **strengths & development challenges** at each station location
- ❖ Provides **potential development scenarios for station area** by unit type, affordability, and timeframe
- ❖ Identifies **parcels most ready** for residential development
- ❖ Recommends **public realm investments** to benefit residential development

E.g. Station Area Assessment - Opus

Key findings: for each station area, a potential development scenario is offered. When taken together with existing housing stock, works toward goal of providing full range of housing choices.



Corridor Strengths

- ❖ Strong demographics/economics of corridor
- ❖ **107,000 jobs** with corporate presence
- ❖ Proximity of station areas to major employment nodes
- ❖ High-quality housing stock, stable neighborhoods, close to parks and recreational opportunities, shopping and restaurants
- ❖ Some stations have good sidewalk and trail connectivity and proximity to amenities; others have potential
- ❖ City staff are experienced and familiar with development tools



L: Bigos development, W. Lake station



R: Target Field Station

Development Challenges



West Austin, TX



New York City, NY

- ❖ Limited vacant land supply
- ❖ Short supply of publicly owned sites
- ❖ Land use issues reduce redevelopment potential
 - Private ownership; highest and best use issues
- ❖ High cost of development
- ❖ Cost of development vs ROI - few deals “pencil out” now without subsidy
- ❖ Auto-oriented areas, lacking pedestrian/bike friendly amenities & connectivity
- ❖ Many lacking street “vibrancy” and supporting commercial/restaurant nodes and public amenities

Housing Preservation

Key findings:

❖ **Affordable Housing is a primary asset in the Corridor presently:**

- 7,700 total units affordable to those with incomes at <60% of AMI (almost ½ of all existing rental units)
 - 1,000 subsidized units (contract based – Sect. 8, public housing, Sect 42)
 - 6,700 “naturally affordable” units at <60% of AMI
 - 508 Section 8 vouchers (tenant- based) are in use within ½ mile of the corridor

❖ **Limited risk of gentrification**

- Older product (1960s/70s vintage)
- Rents in many cases are well below 60% of AMI target
- Quality and market obsolescence will limit potential for future significant rent increases

❖ **Preservation is far less expensive than construction of new units.**

Key Recommended Next Steps

Housing Preservation

❖ Create Strategy to Target Existing Housing Stock That is Older and Affordable:

- **Rehab/renovation strategy**
 - Address deferred maintenance issues
 - Assure long-term sustainability
 - Public/private/non-profit partnerships for strategic acquisitions
 - Low-interest loans for maintenance and improvements

❖ Match lower income households with existing units that are affordable.

- ### ❖ Match services with resident base.
- foster upward mobility (job/life skills)



Key Recommended Next Steps

A Full Range of Housing Choices

- ❖ **Develop “branding” and promotions strategy for SW LRT lifestyle**
 - Promote market awareness of the benefits to TOD living in SW corridor

- ❖ **Station Area Master Planning**
 - Focus on stations with significant public land ownership – near term development opportunities
 - Opportunity for a signature development to set the stage for quality development

Key Recommended Next Steps

A Full Range of Housing Choices

❖ **Develop consensus and adopt housing policy goals**

- High quality TOD
- Provision of a full range of housing choices
- Establish goals and policy objectives which promote mixed-income housing development
- Individual jurisdictions can utilize their own “toolbox” to achieve the goals.
- Inclusionary housing policy, possibly inclusionary zoning.

❖ **Create a coordinated SW LRT Housing Policy Overlay Zone**

- ½ mile from each station area
- Focus and apply housing goals, policy and oversight
- Structure and composition to be determined – public/private partnership
- Buy-in from all corridor cities is key to success
- Cities maintain development review/approval authority

Key Recommended Next Steps

A Full Range of Housing Choices

❖ **Establish a \$200m+ TOD Affordable Housing Fund**

- new construction of **1,300 new units @ <60% of AMI**
- preserve/improve **7,700 existing units affordable** at <60% of AMI.

➤ **Why?** Existing tools/strategies are not enough to have impact at major scale

➤ **Structure:**

- Independently financed pool of funds that provides a return to investors
- More risk tolerant than traditional financing
- Patient financing with longer term payback

➤ **Possible Capitalization:**

- Local foundations & intermediaries
- Family funds and partnerships
- Corporate interests (e.g. major businesses in SW corridor)
- Traditional institutional investment sources (insurance companies, etc)

Next Steps: Development of a Southwest Corridor-wide Housing Strategy

Draft Strategy

- Led by Housing Workgroup
- Drawing on Inventory, Gaps Analysis, Investment Framework and other research

TIC Review

- Consultation and review of Strategy components by TIC

Steering Committee Action

- Present Strategy to Steering Committee
- Finalize strategy
- Move to implementation with partners

Stakeholder Engagement:

- Housing community
- General public
- City Council presentations on Gaps Analysis & Suggested Strategy



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www.swlrtccommunityworks.org





Questions/Discussion

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Southwest LRT Corridor Presentation

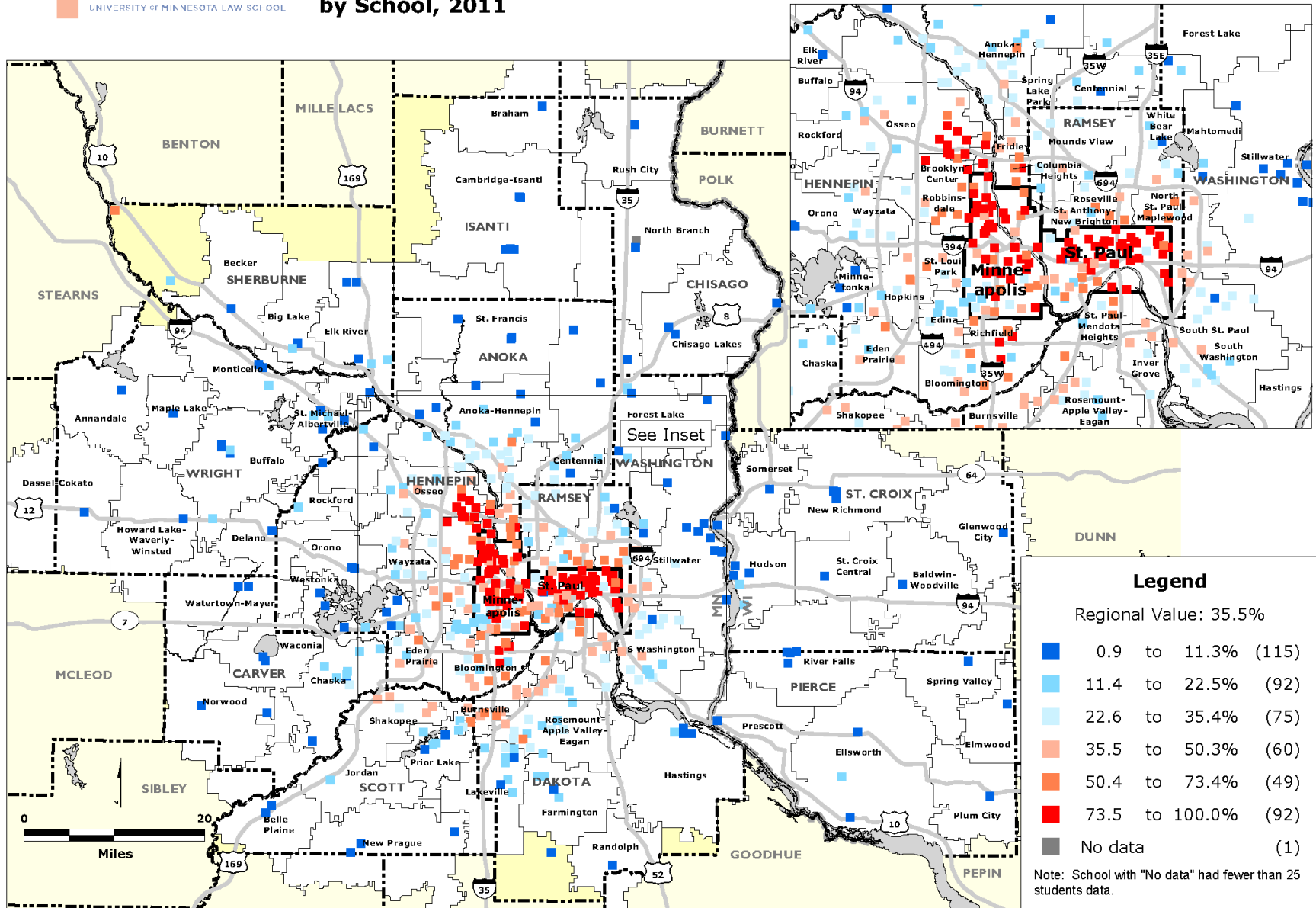
September 18th, 2014
Myron Orfield





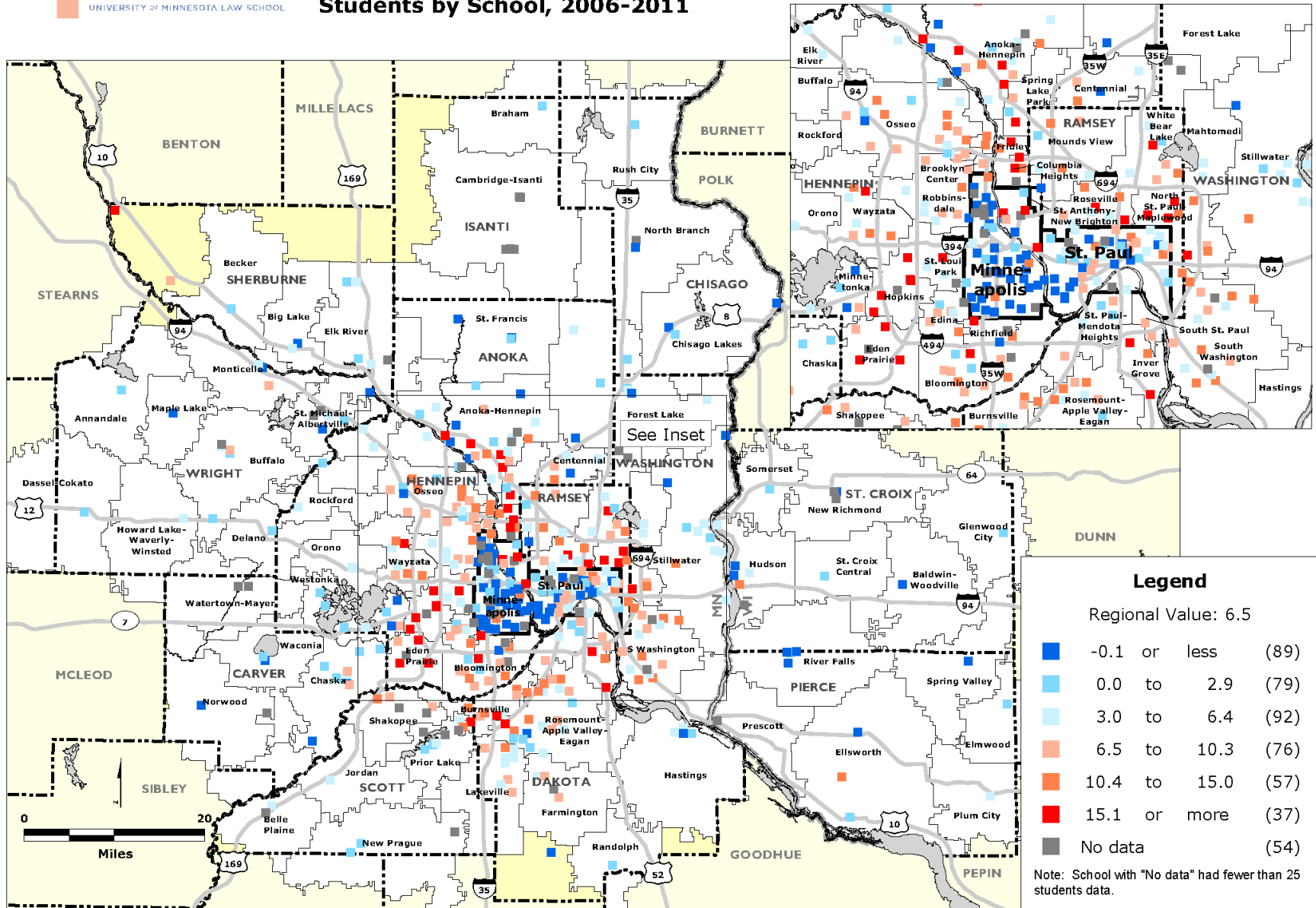
Twin Cities School Demographics

MINNEAPOLIS-SAINT PAUL REGION: Percentage Minority Elementary Students by School, 2011



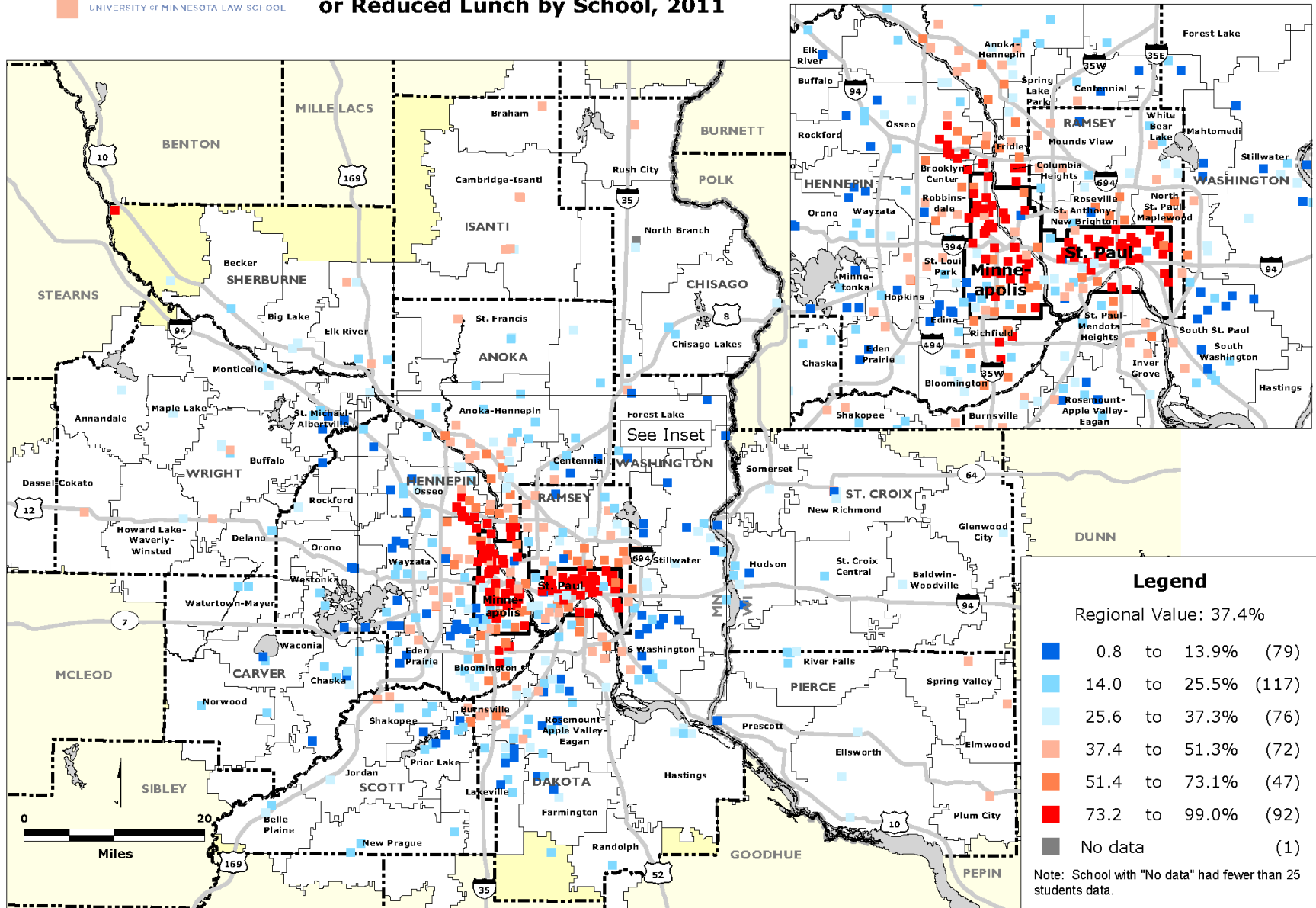
Data Source: National Center for Education Statistics.

MINNEAPOLIS-SAINT PAUL REGION: Percentage Point Change in the Share of Minority Elementary Students by School, 2006-2011



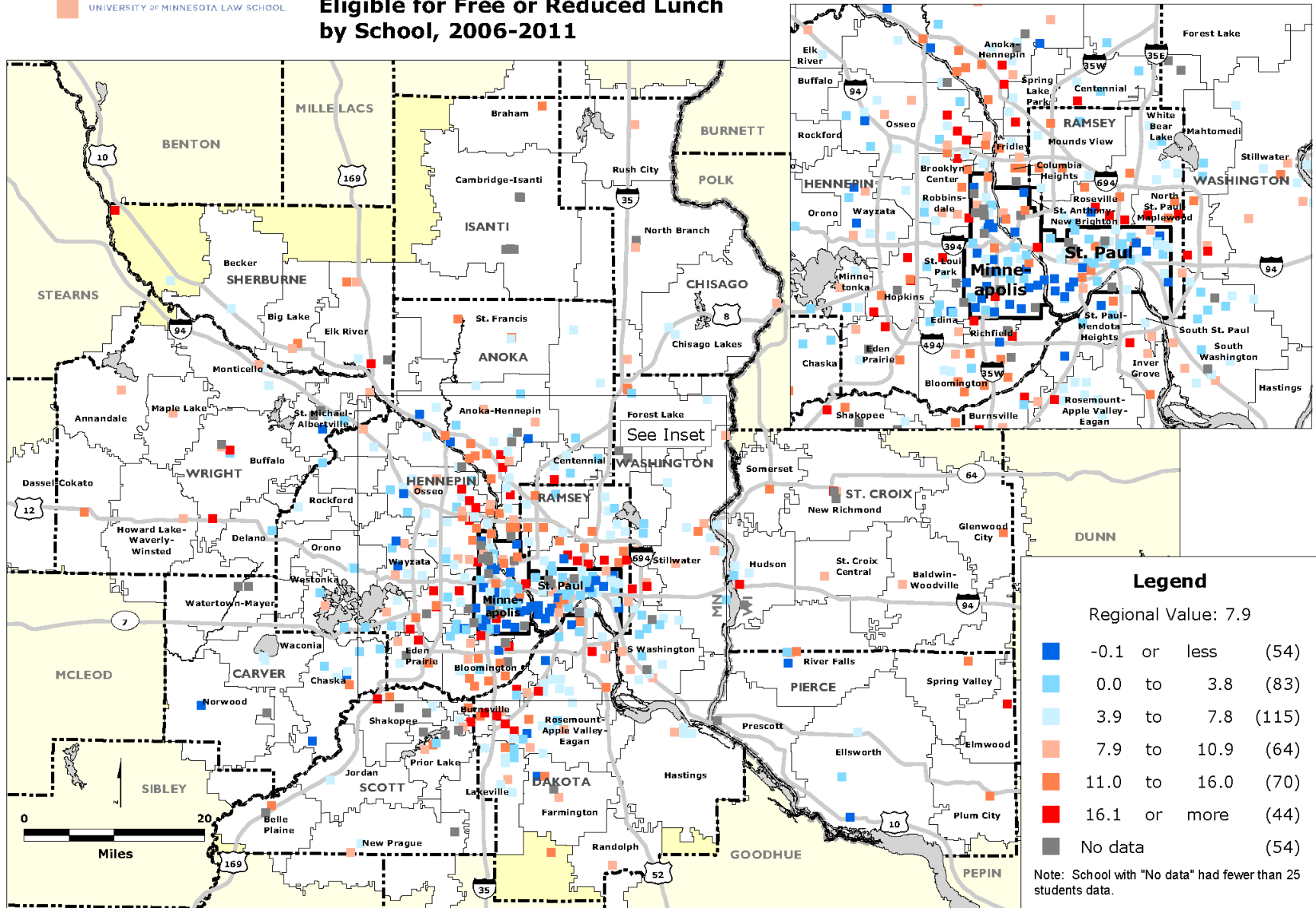
Data Source: National Center for Education Statistics.

MINNEAPOLIS-SAINT PAUL REGION: Percentage of Elementary Students Eligible for Free or Reduced Lunch by School, 2011



Data Source: National Center for Education Statistics.

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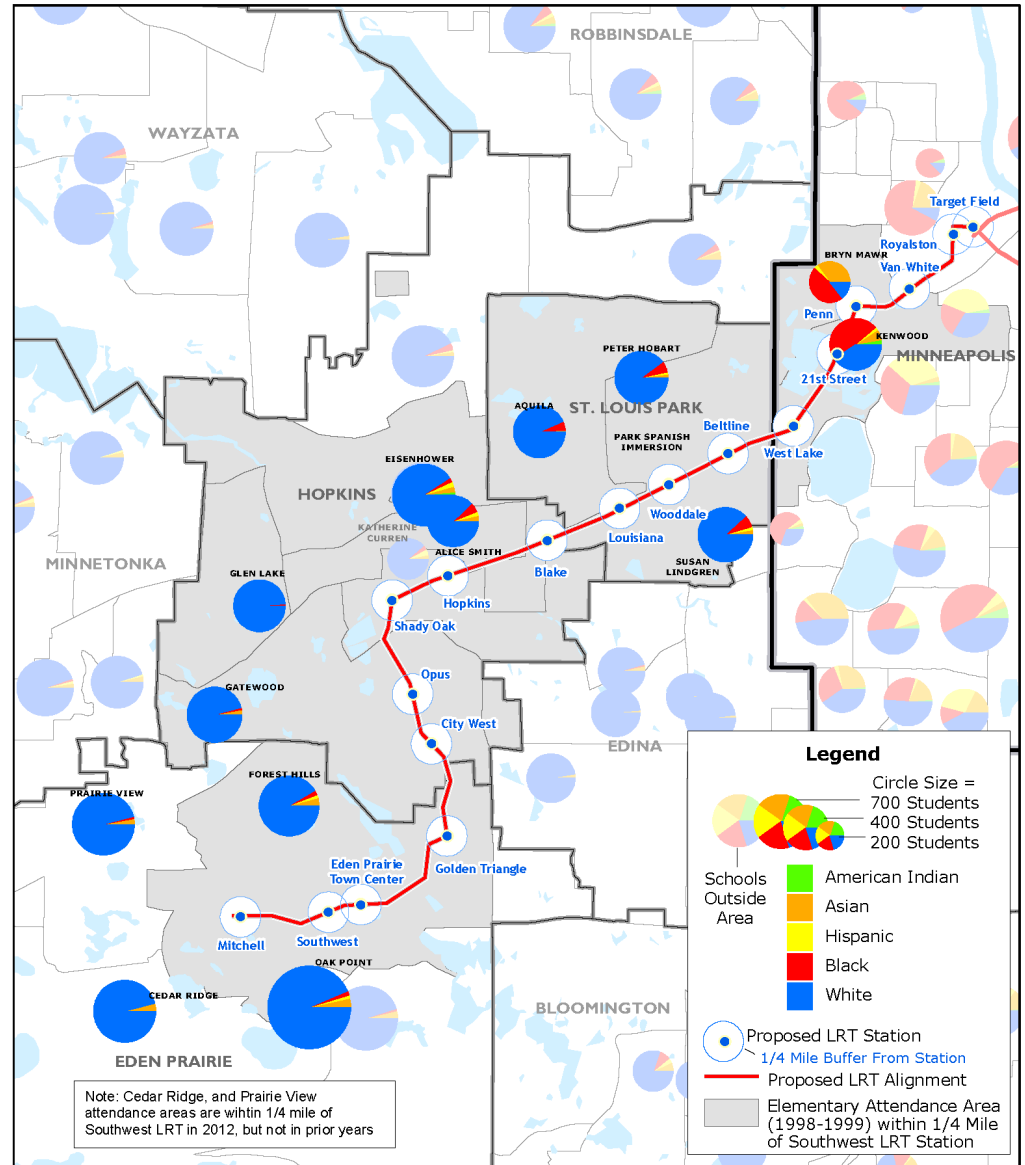
Southwest LRT Corridor School Demographics



Southwest Corridor LRT Race and Ethnicity 1995-2011

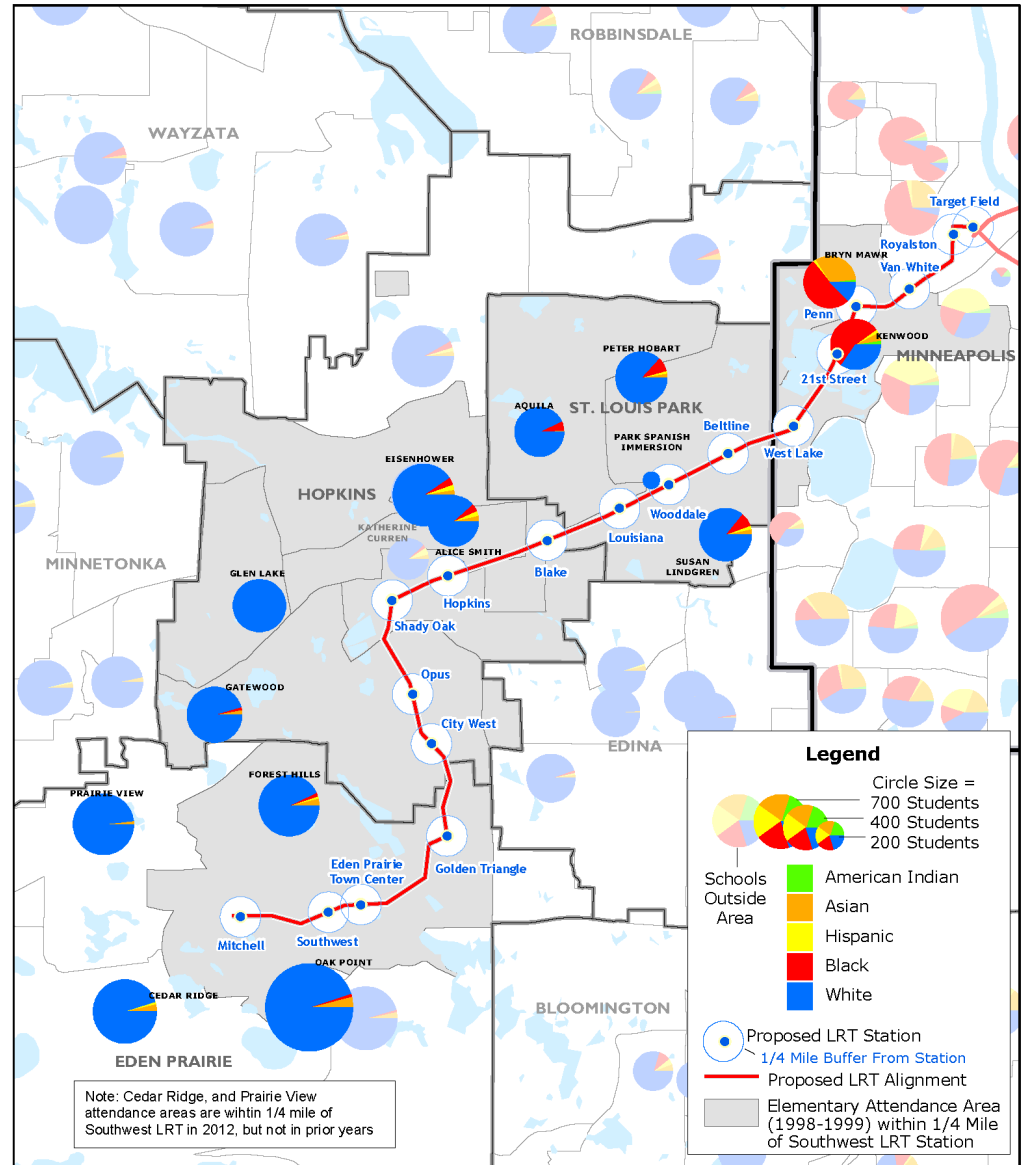


MINNEAPOLIS - SAINT PAUL Southwest Region Race and Ethnicity of Students in Elementary Schools for the School Year 1995-1996 Near Proposed Southwest Corridor Light Rail Transit



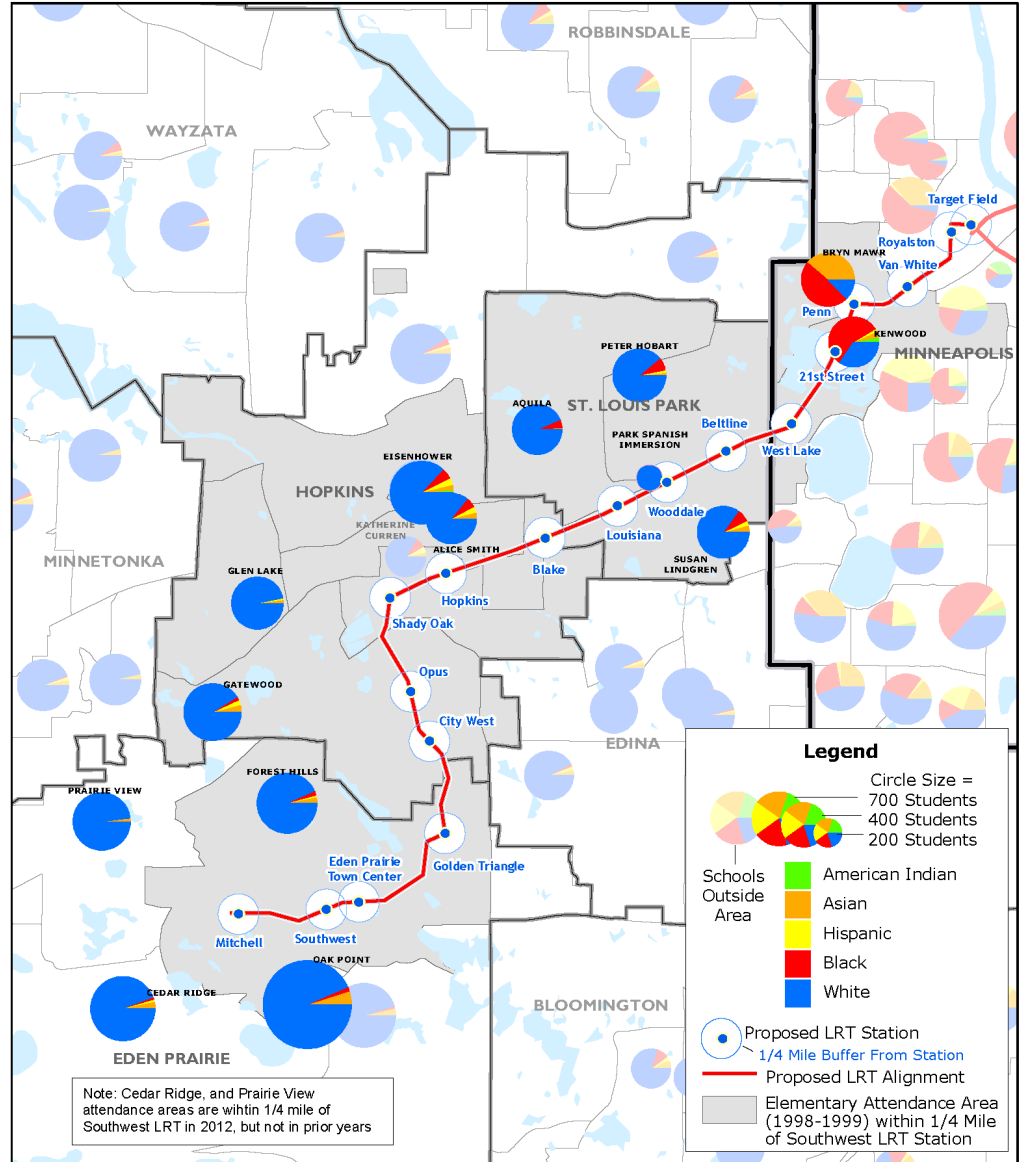
Data Source: Metropolitan Council, IRP, Minnesota Department of Education.

MINNEAPOLIS - SAINT PAUL SOUTHWEST REGION
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Data Source: Metropolitan Council, IRP, Minnesota Department of Education.

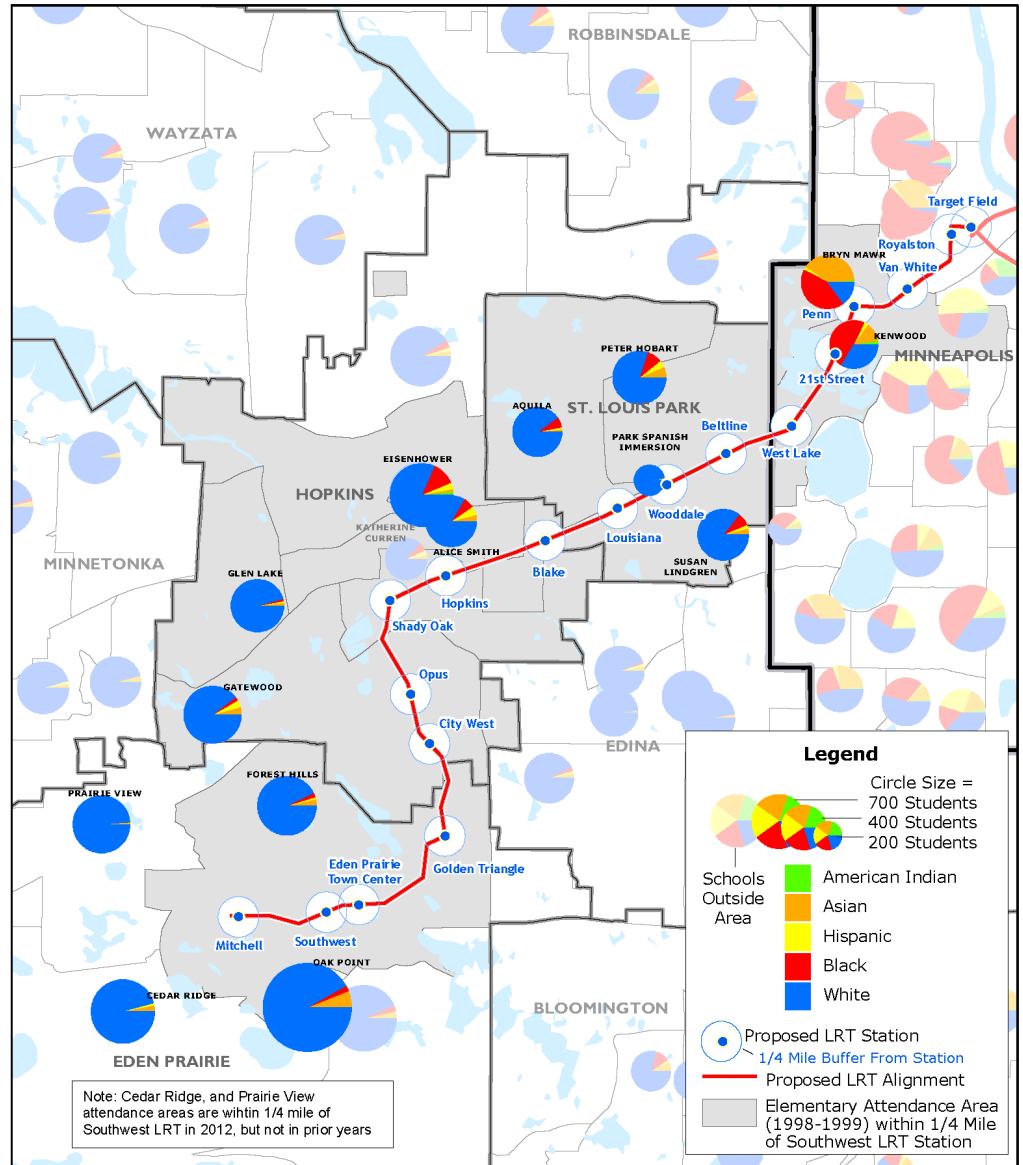
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Data Source: Metropolitan Council, IRP, Minnesota Department of Education.



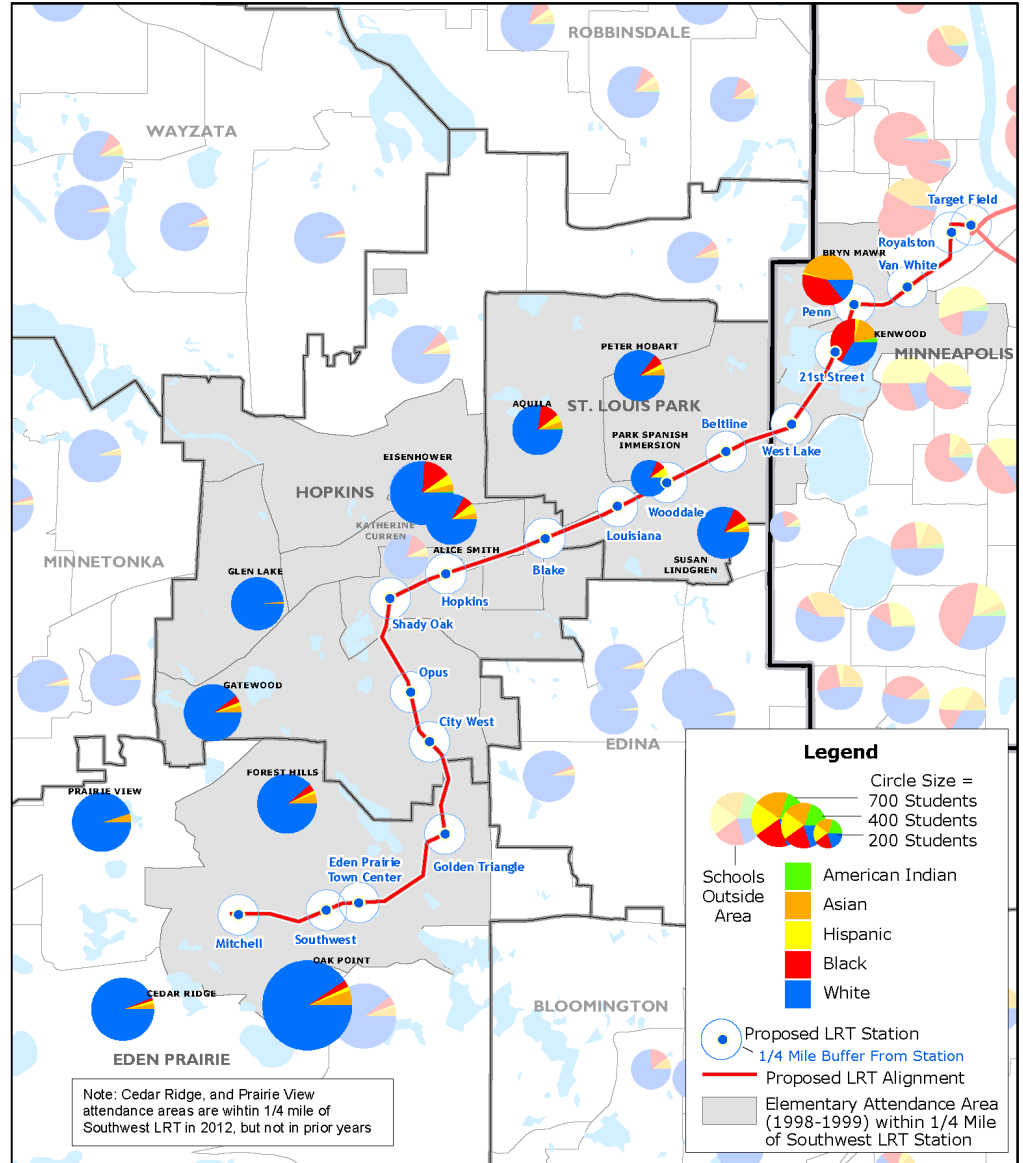
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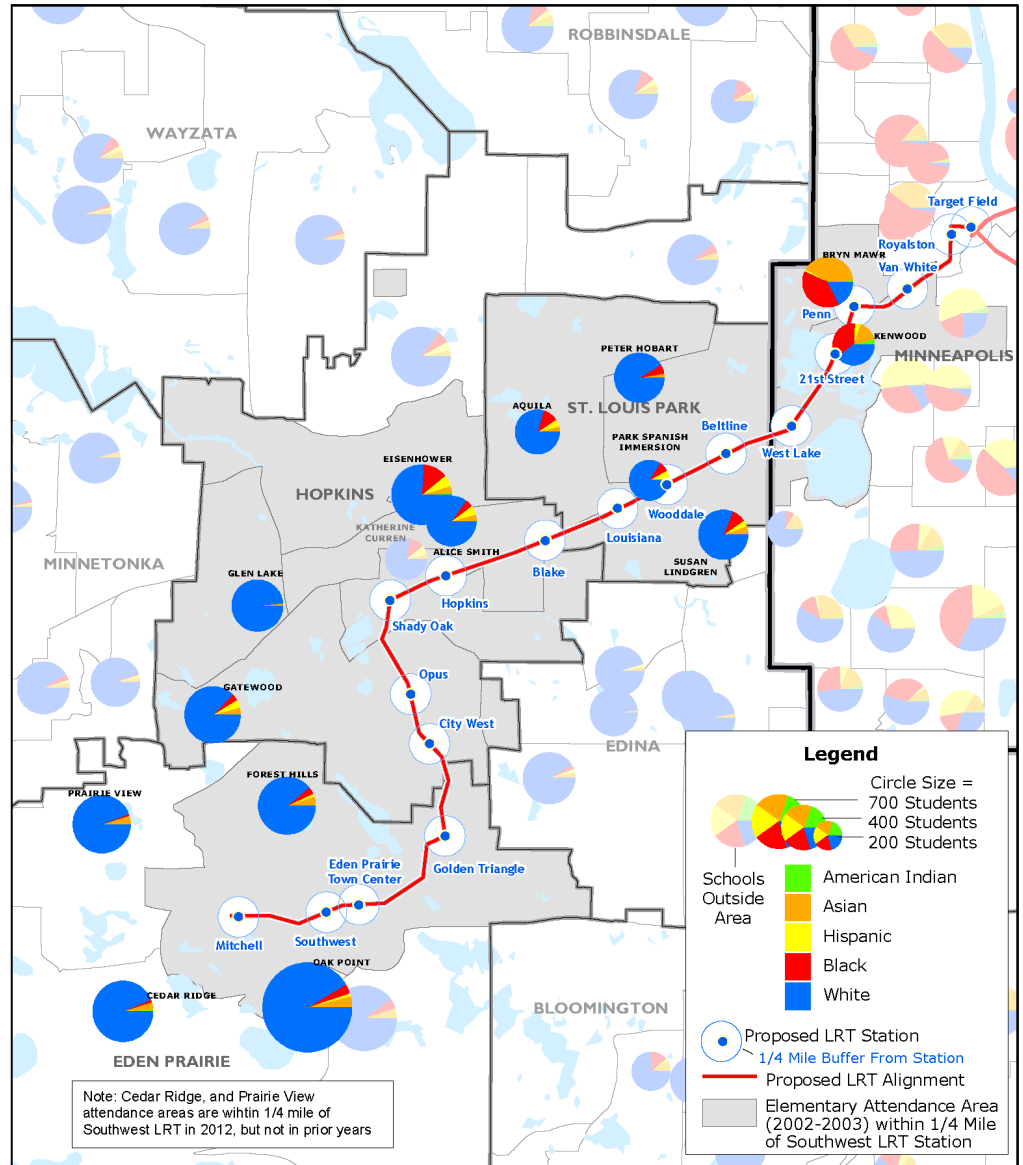
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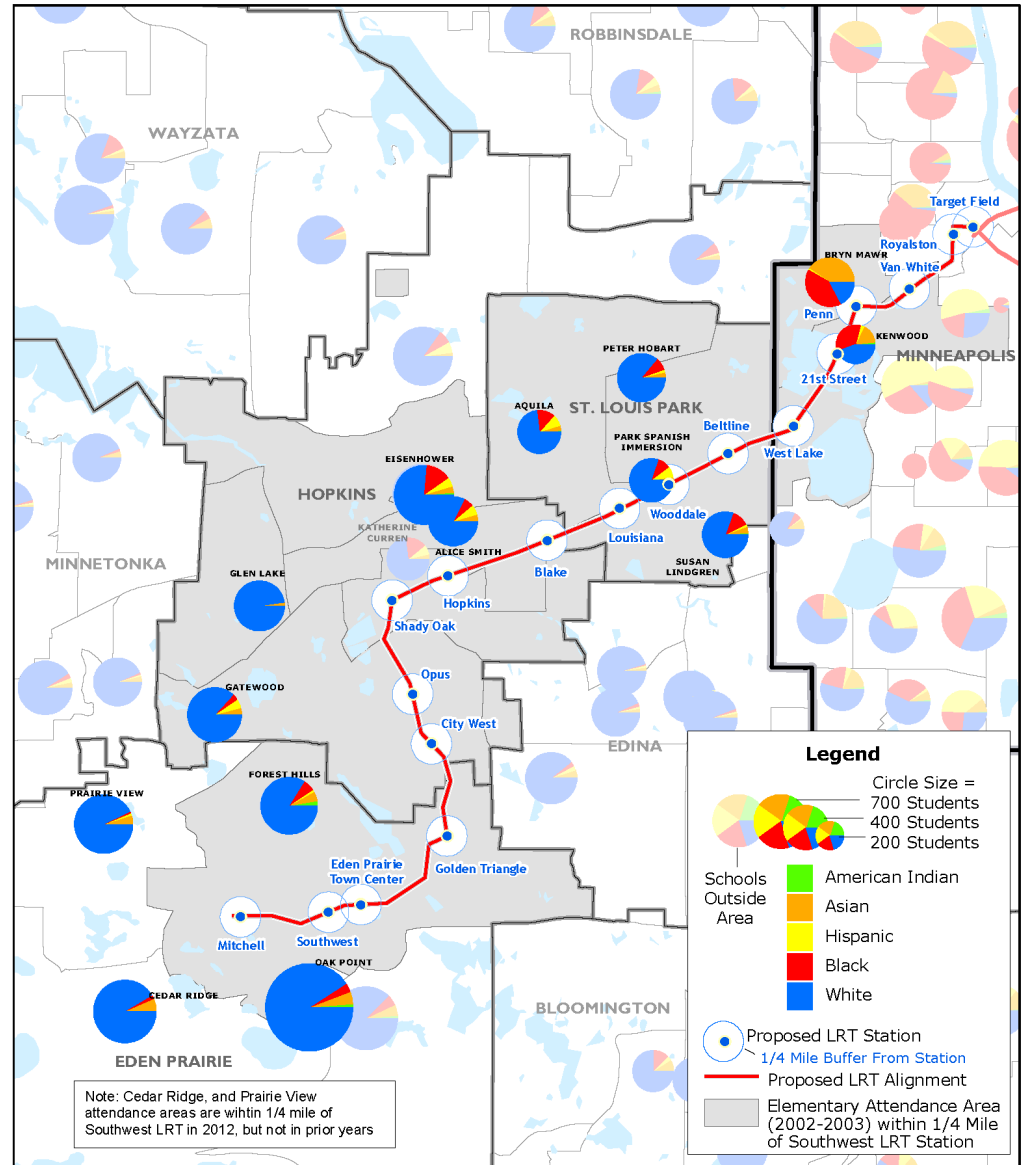


Data Source: Metropolitan Council, IRP, Minnesota Department of Education.





MINNEAPOLIS - SAINT PAUL SOUTHWEST REGION
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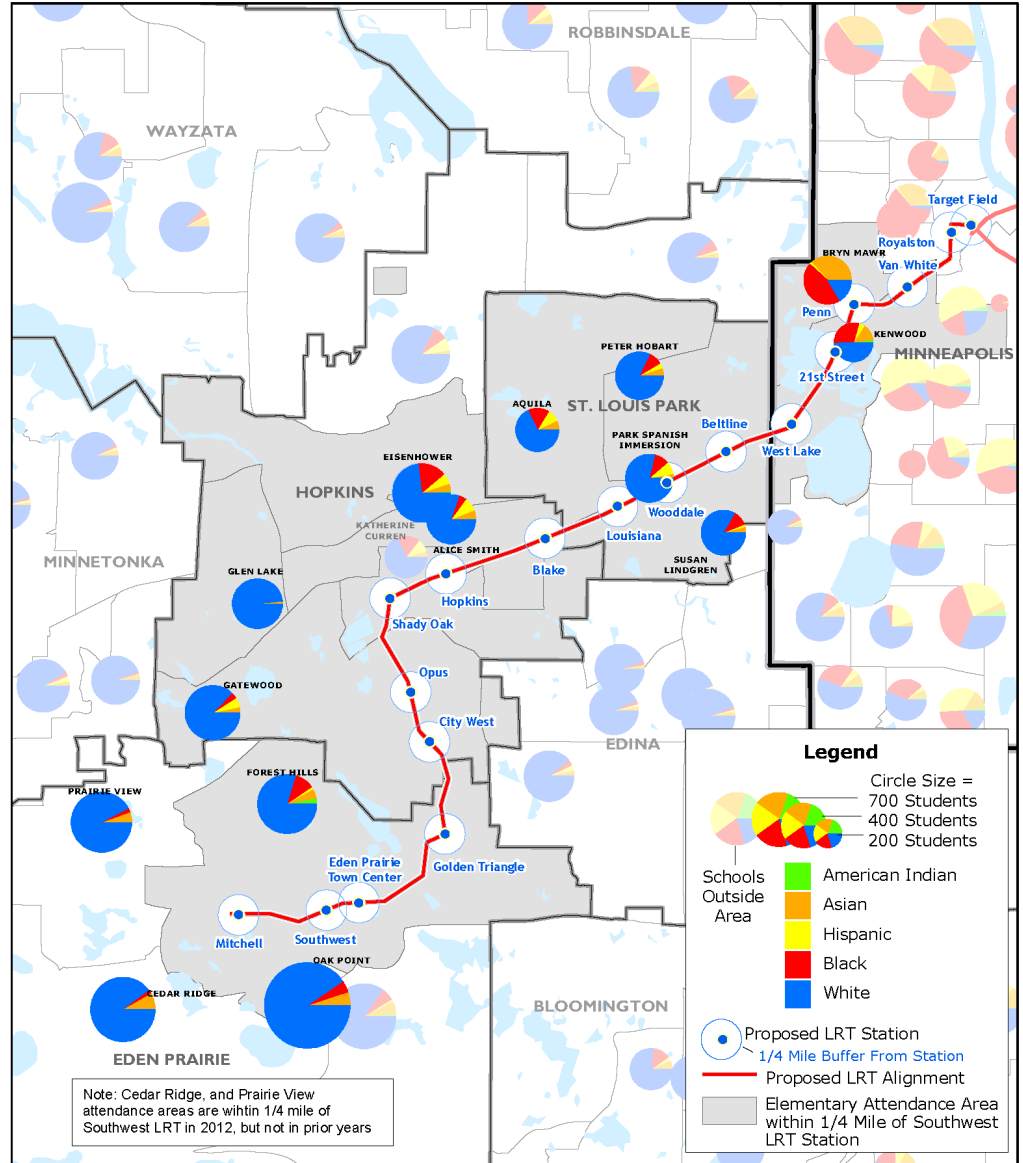


Data Source: Metropolitan Council, IRP, Minnesota Department of Education.





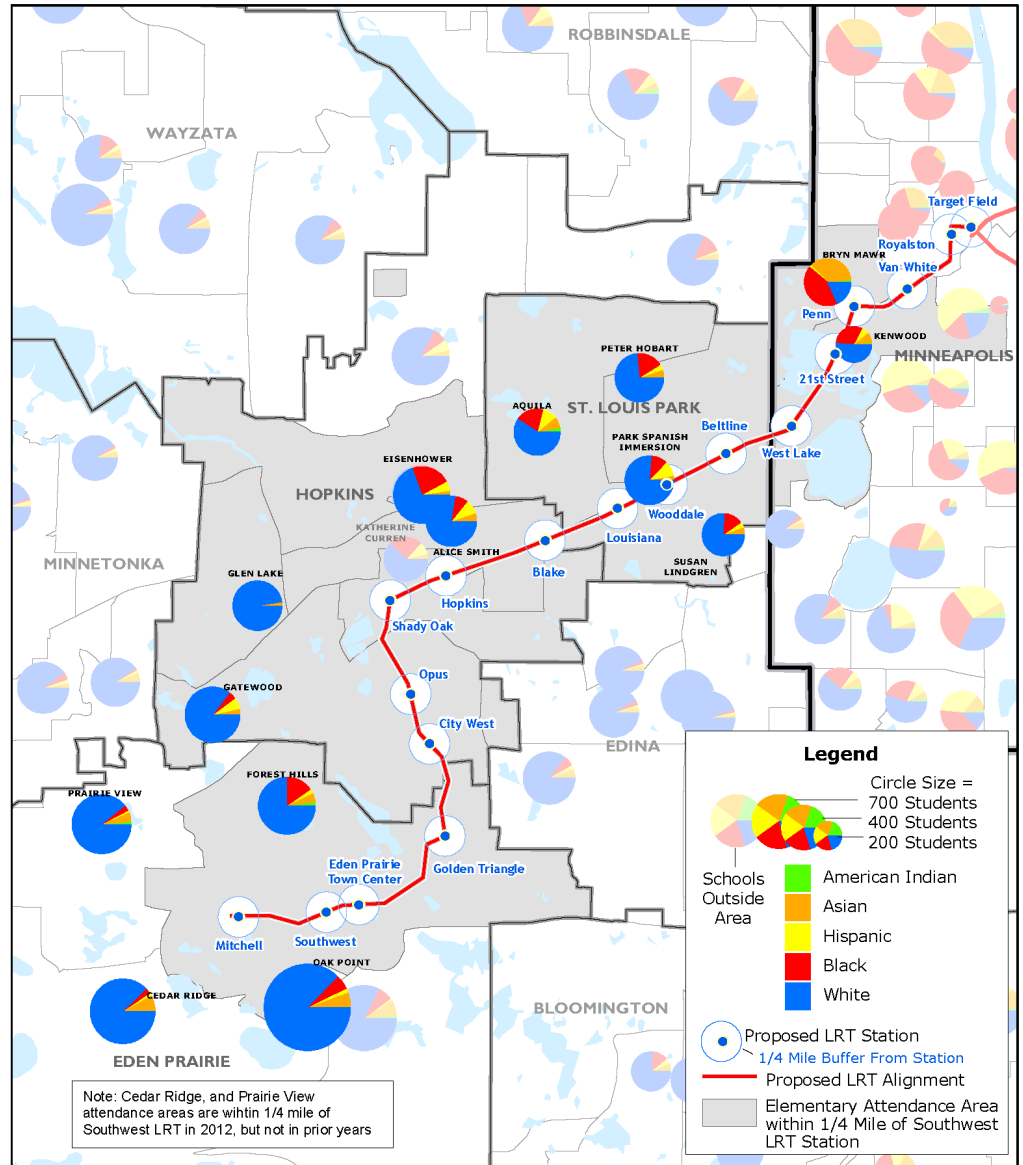
MINNEAPOLIS - SAINT PAUL SOUTHWEST REGION
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Data Source: Metropolitan Council, IRP, Minnesota Department of Education.



MINNEAPOLIS - SAINT PAUL SOUTHWEST REGION
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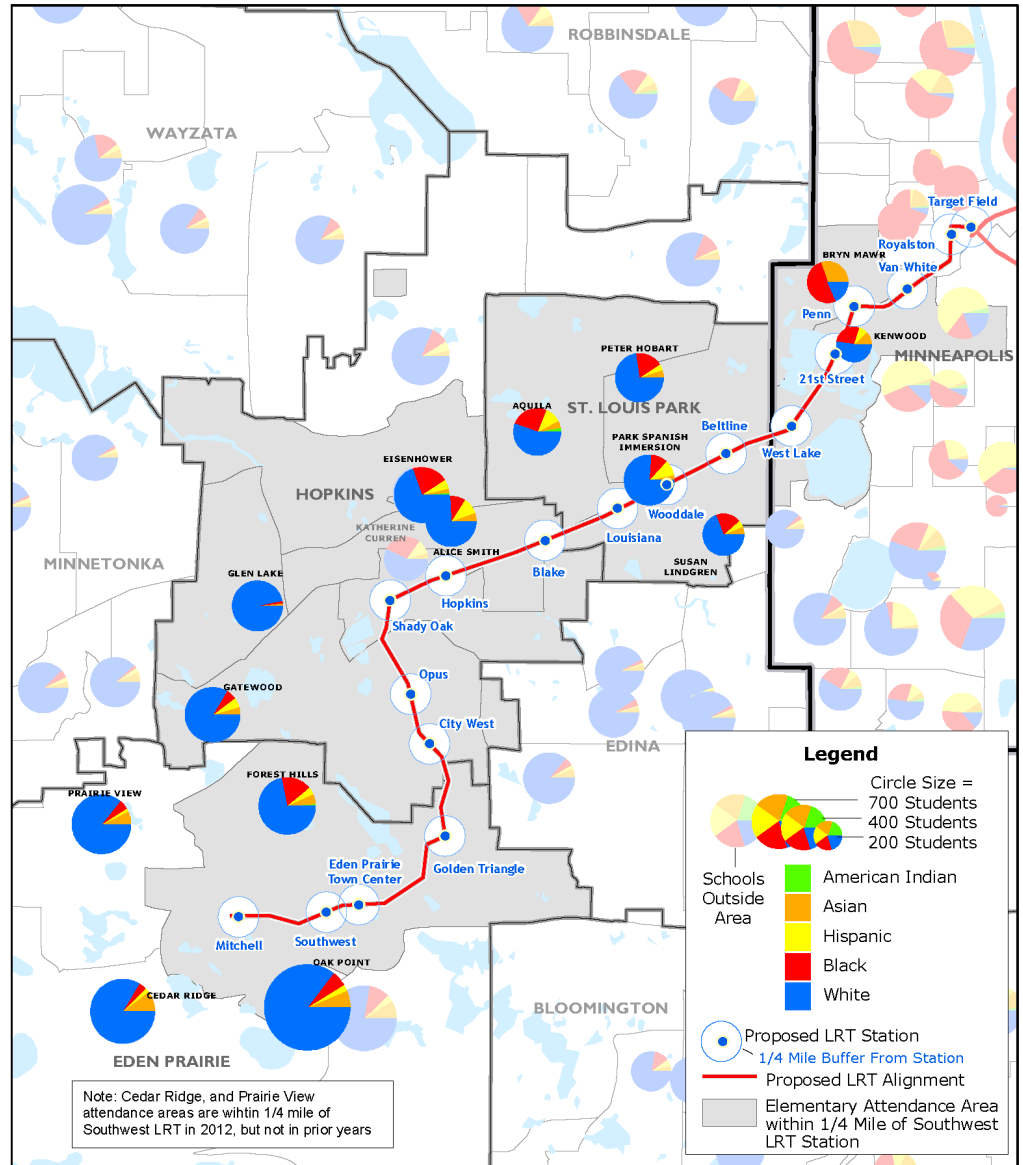


Data Source: Metropolitan Council, IRP, Minnesota Department of Education.





MINNEAPOLIS - SAINT PAUL SOUTHWEST REGION
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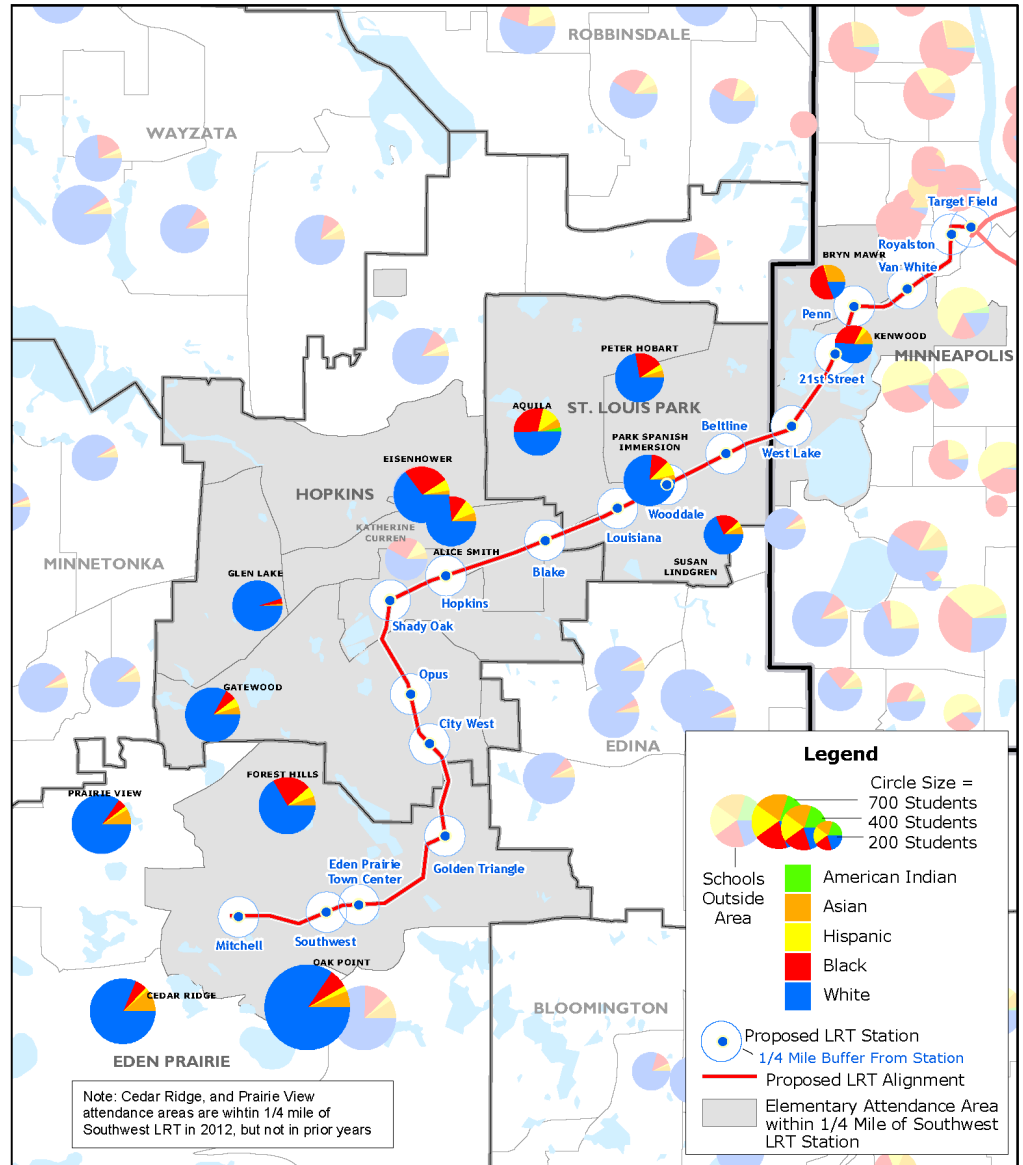


Data Source: Metropolitan Council, IRP, Minnesota Department of Education.





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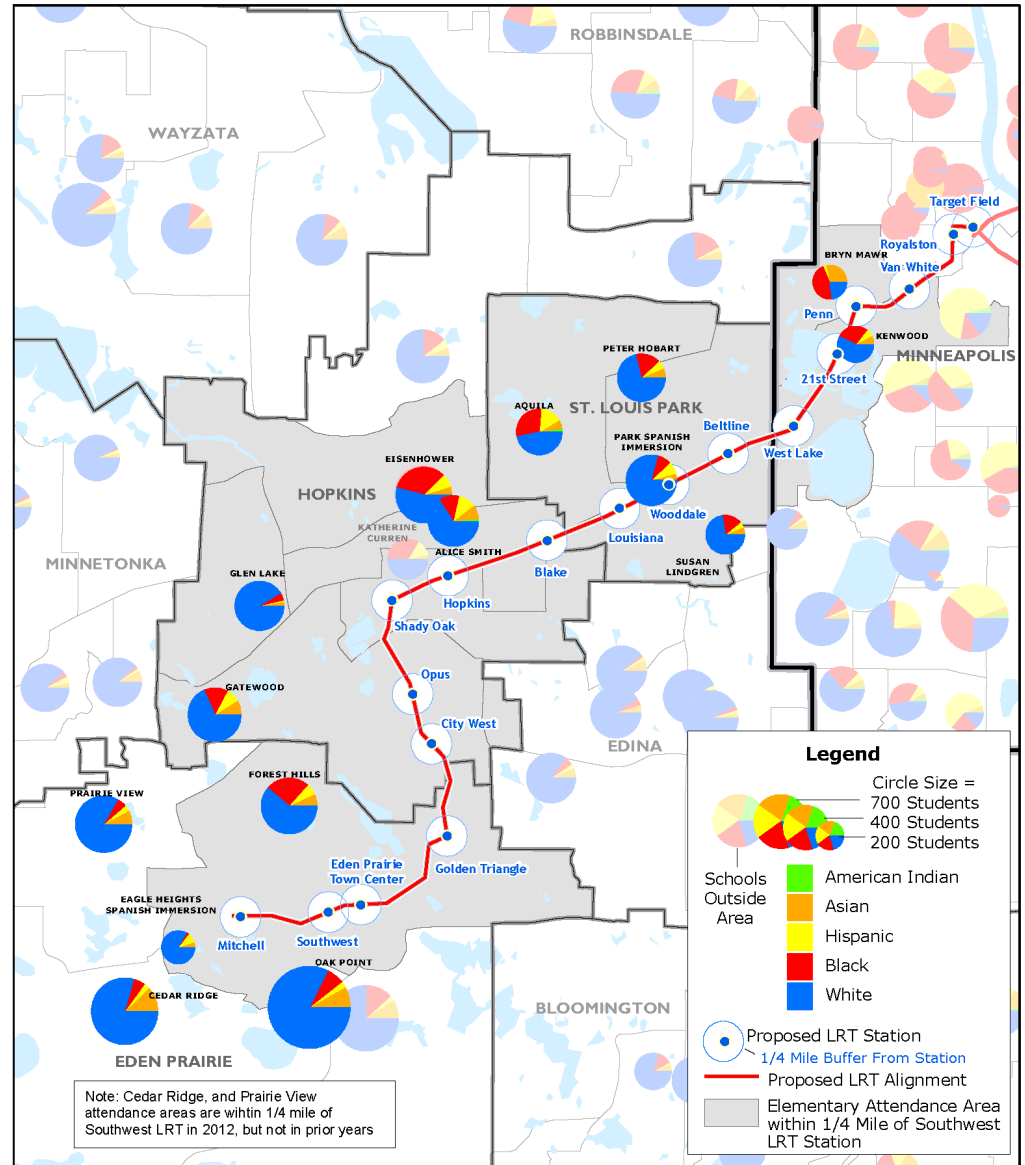


Data Source: Metropolitan Council, IRP, Minnesota Department of Education.





MINNEAPOLIS - SAINT PAUL SOUTHWEST REGION
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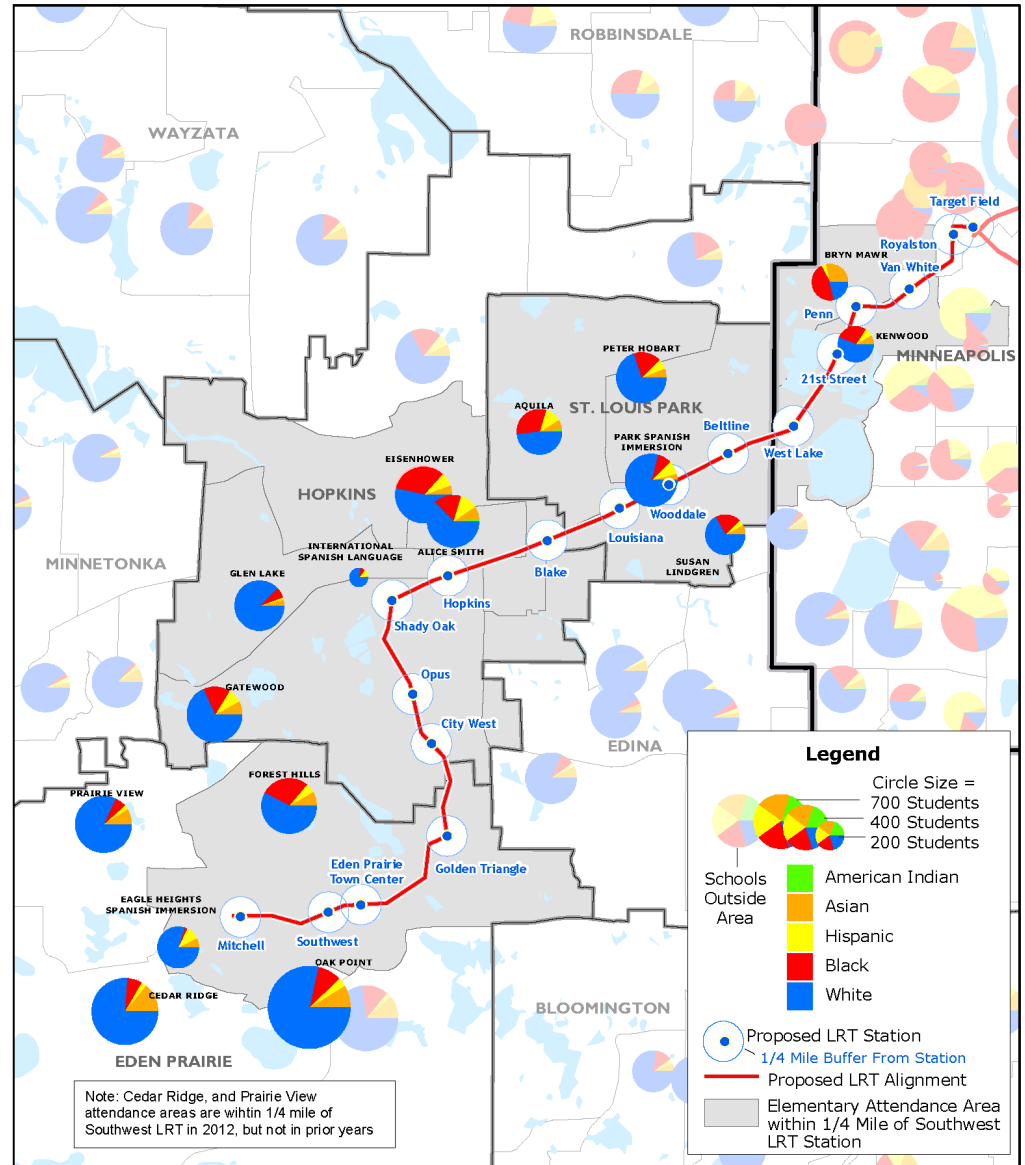


Data Source: Metropolitan Council, IRP, Minnesota Department of Education.





MINNEAPOLIS - SAINT PAUL SOUTHWEST REGION
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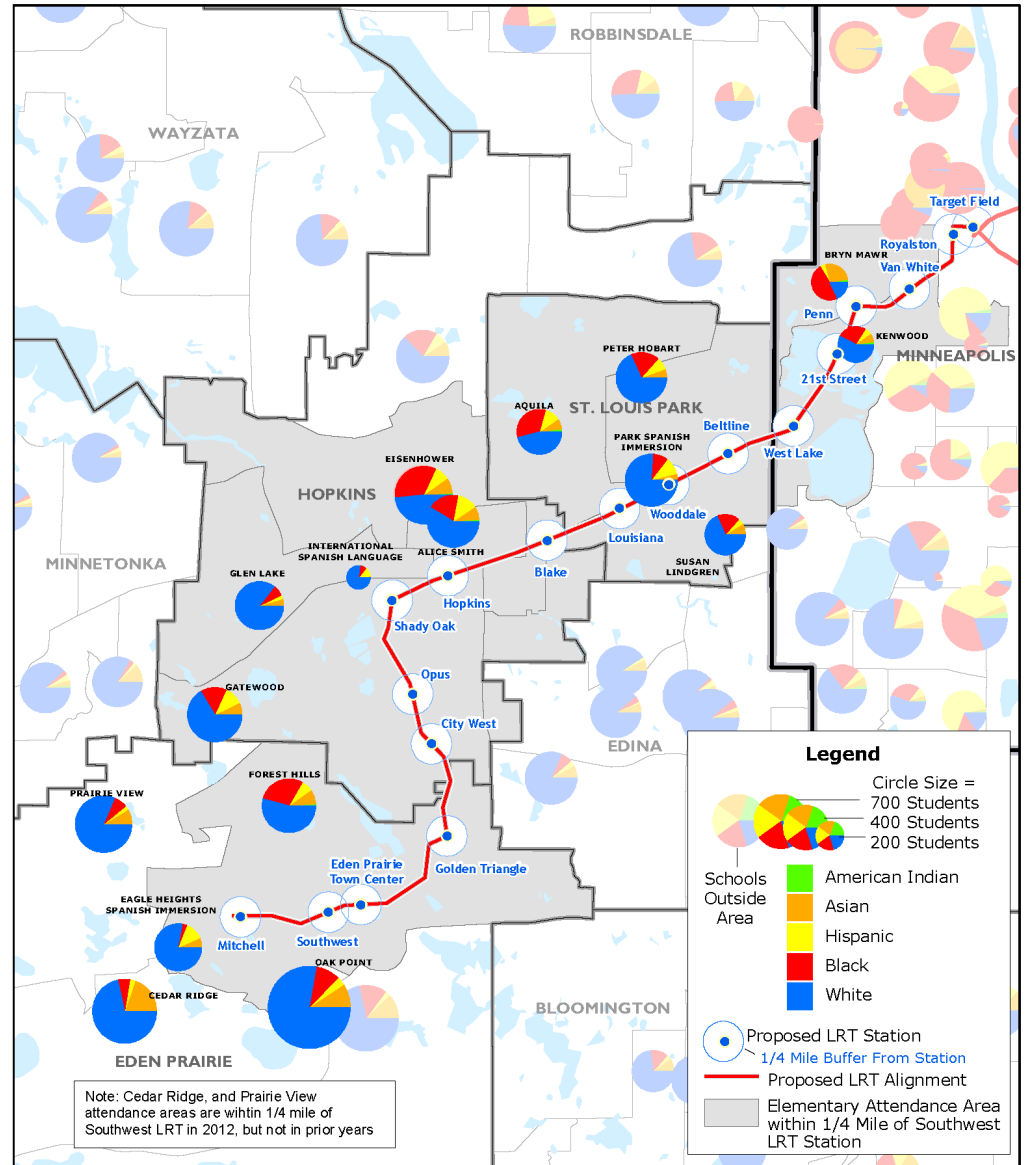


Data Source: Metropolitan Council, IRP, Minnesota Department of Education.





MINNEAPOLIS - SAINT PAUL SOUTHWEST REGION
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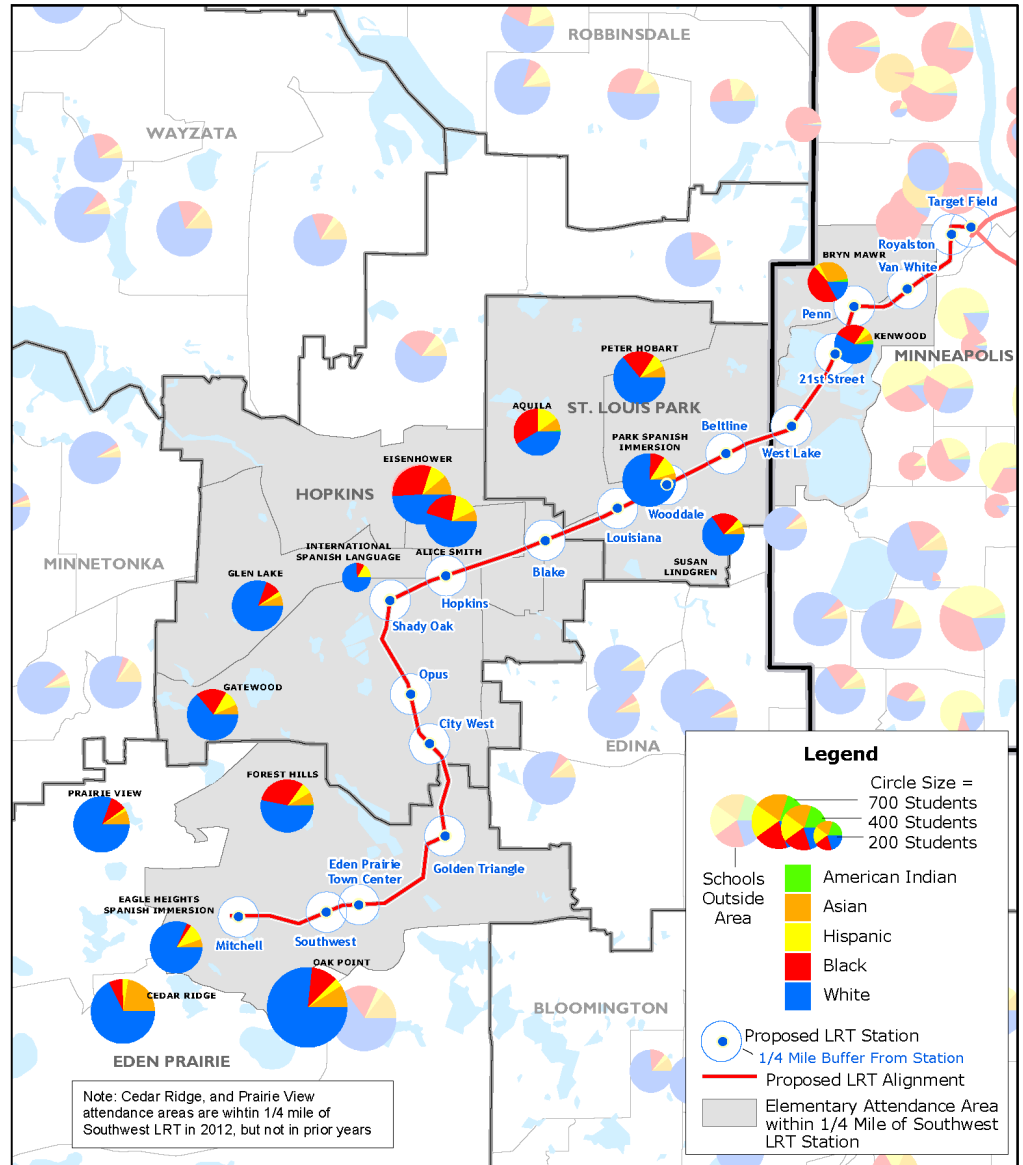


Data Source: Metropolitan Council, IRP, Minnesota Department of Education.





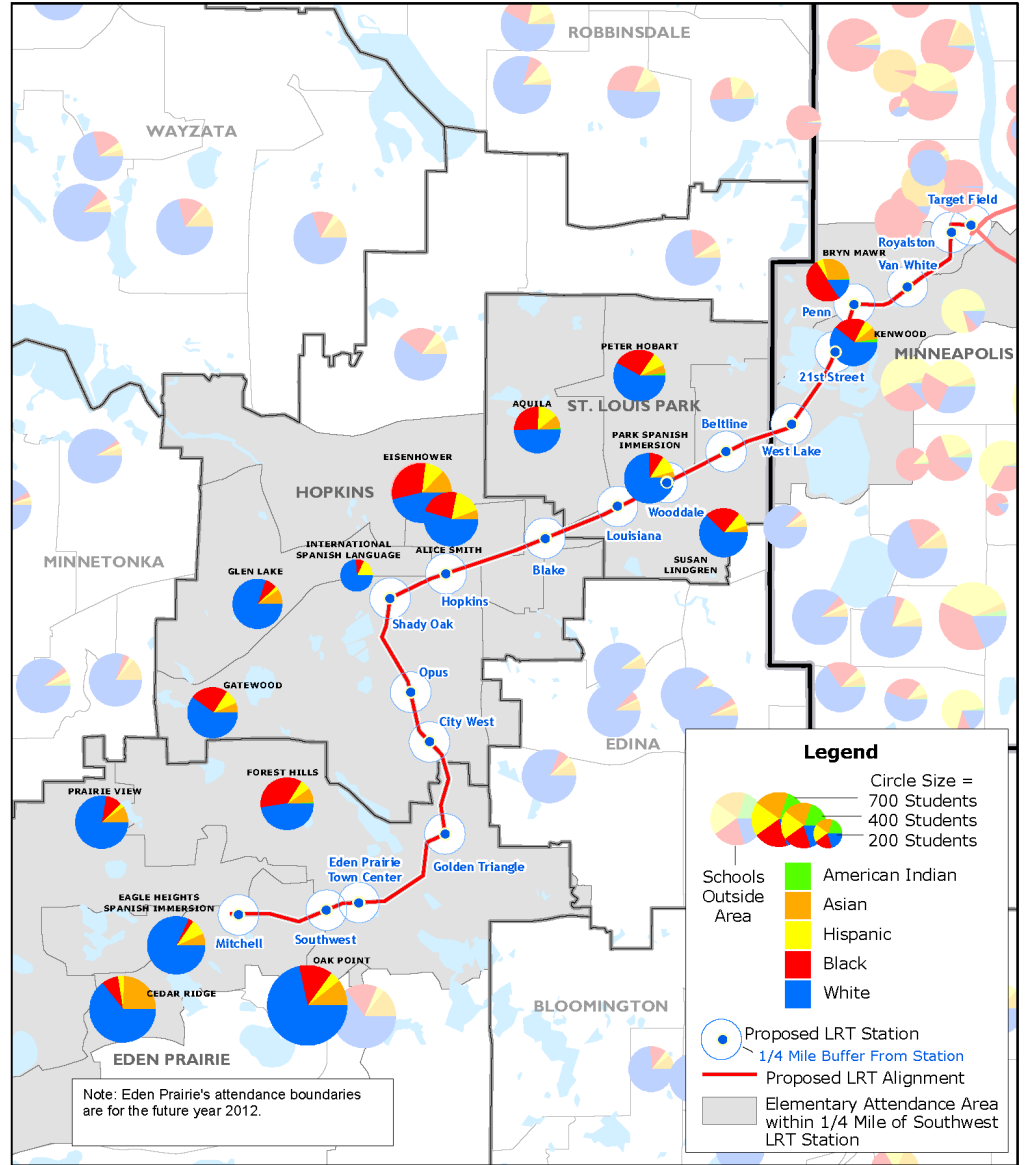
MINNEAPOLIS - SAINT PAUL SOUTHWEST REGION
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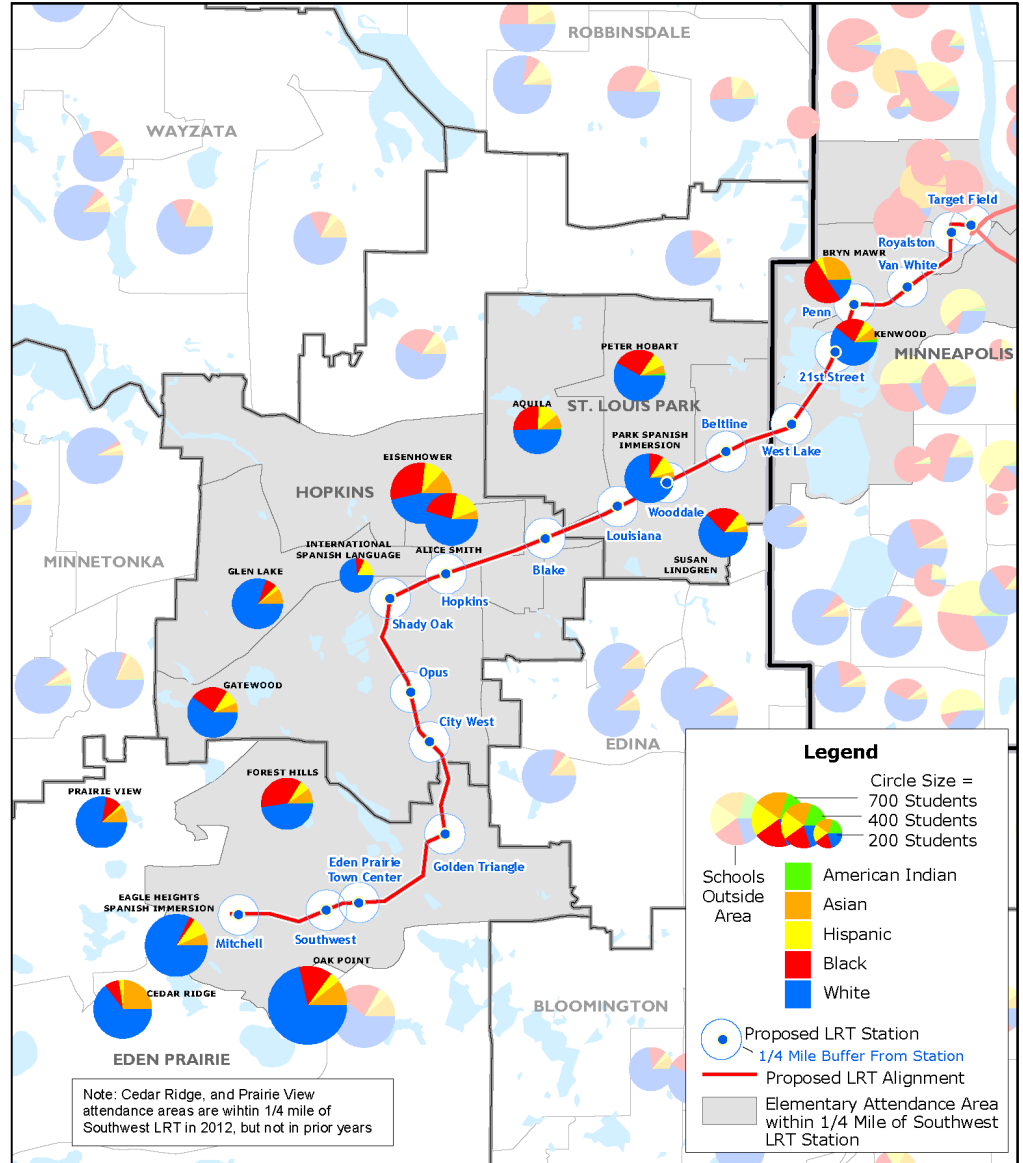
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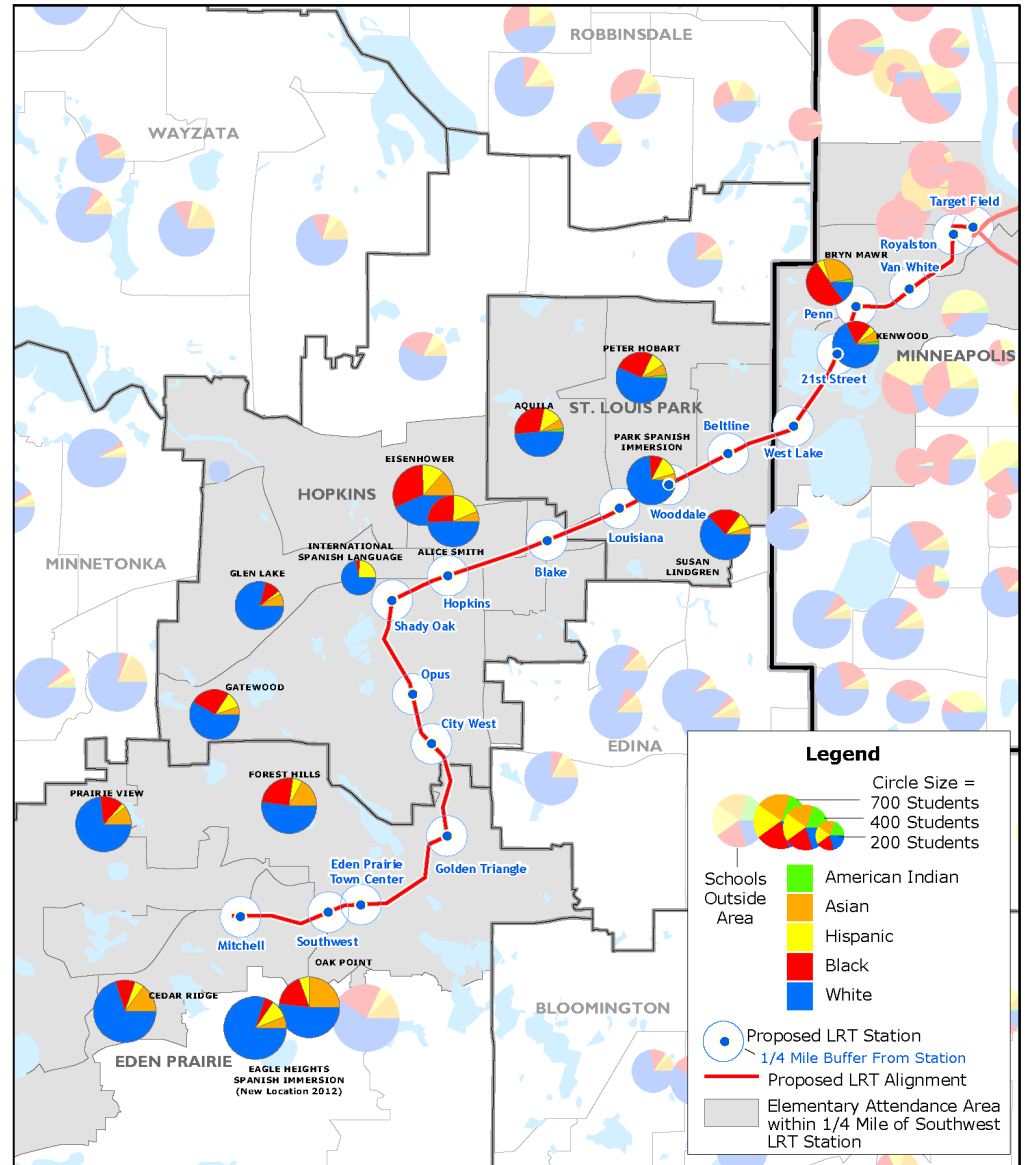
MINNEAPOLIS - SAINT PAUL SOUTHWEST REGION
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Data Source: Metropolitan Council, IRP, Minnesota Department of Education.



MINNEAPOLIS - SAINT PAUL SOUTHWEST REGION
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Data Source: Metropolitan Council, IRP, Minnesota Department of Education.

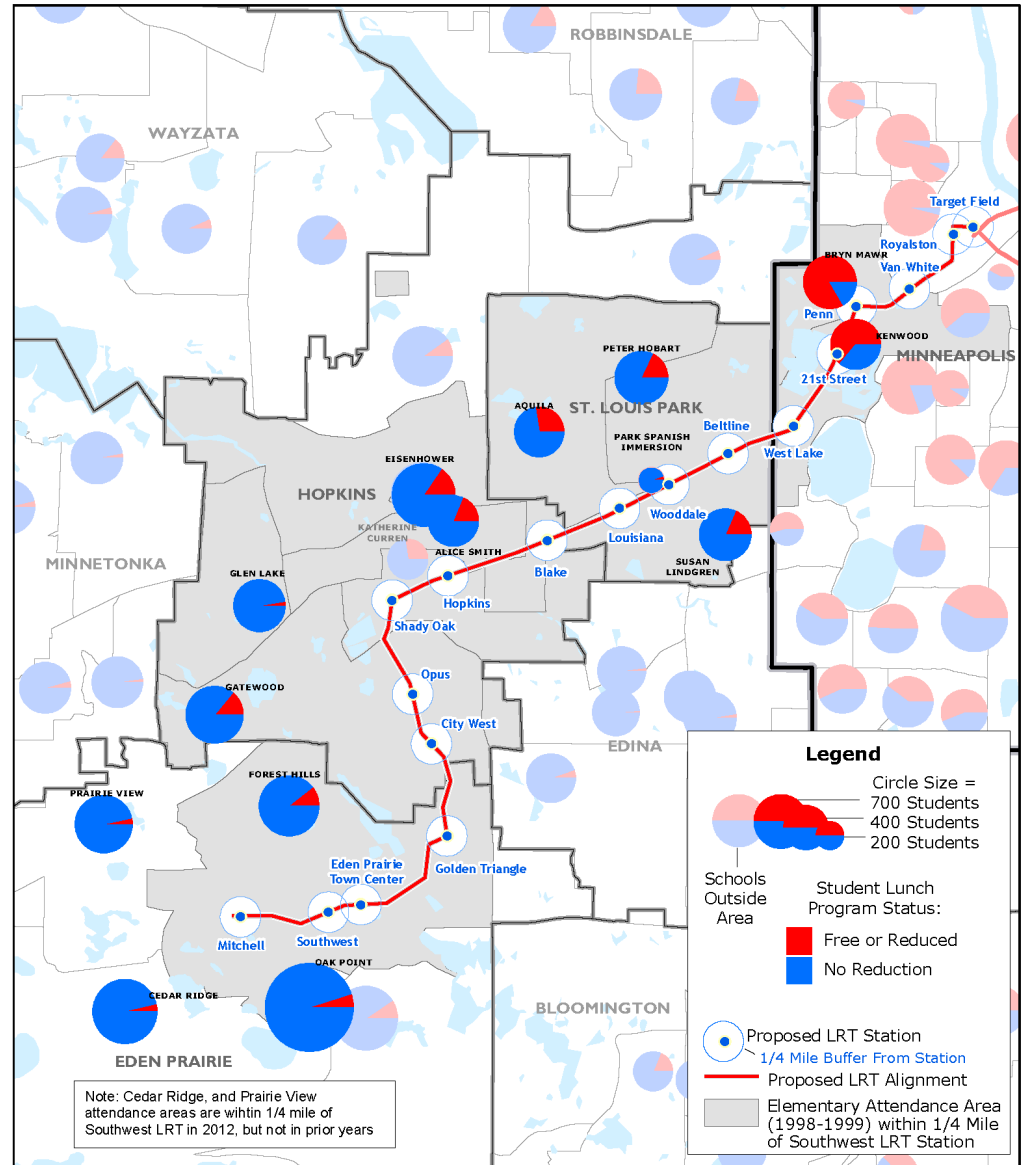




Southwest Corridor LRT Lunch Program Eligibility 1997-2011



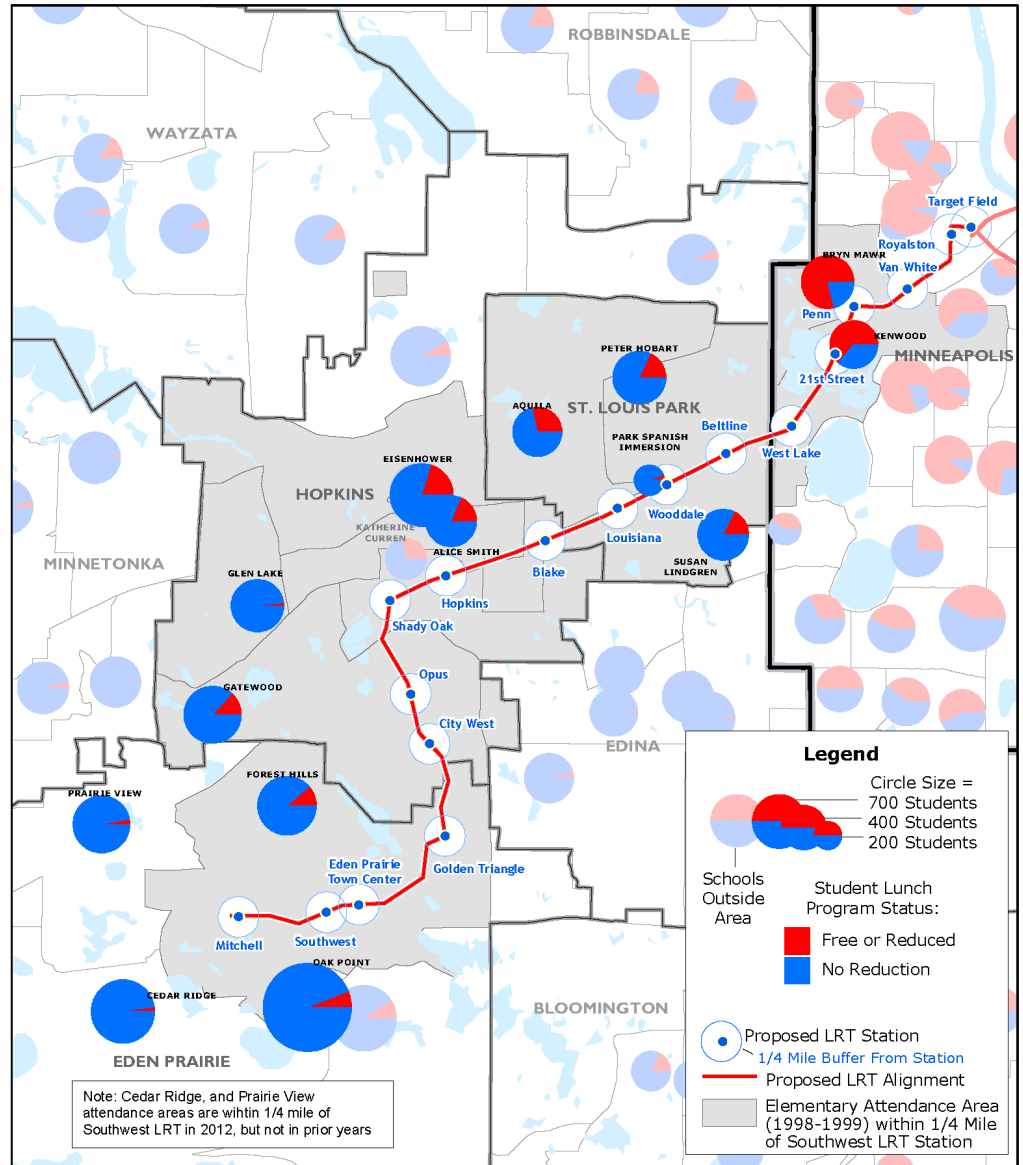
MINNEAPOLIS - SAINT PAUL SOUTHWEST REGION Free and Reduced Lunch Eligibility of Students in Elementary Schools for the School Year 1997-1998 Near Proposed Southwest Corridor Light Rail Transit



Data Source: Metropolitan Council, IRP, Minnesota Department of Education.



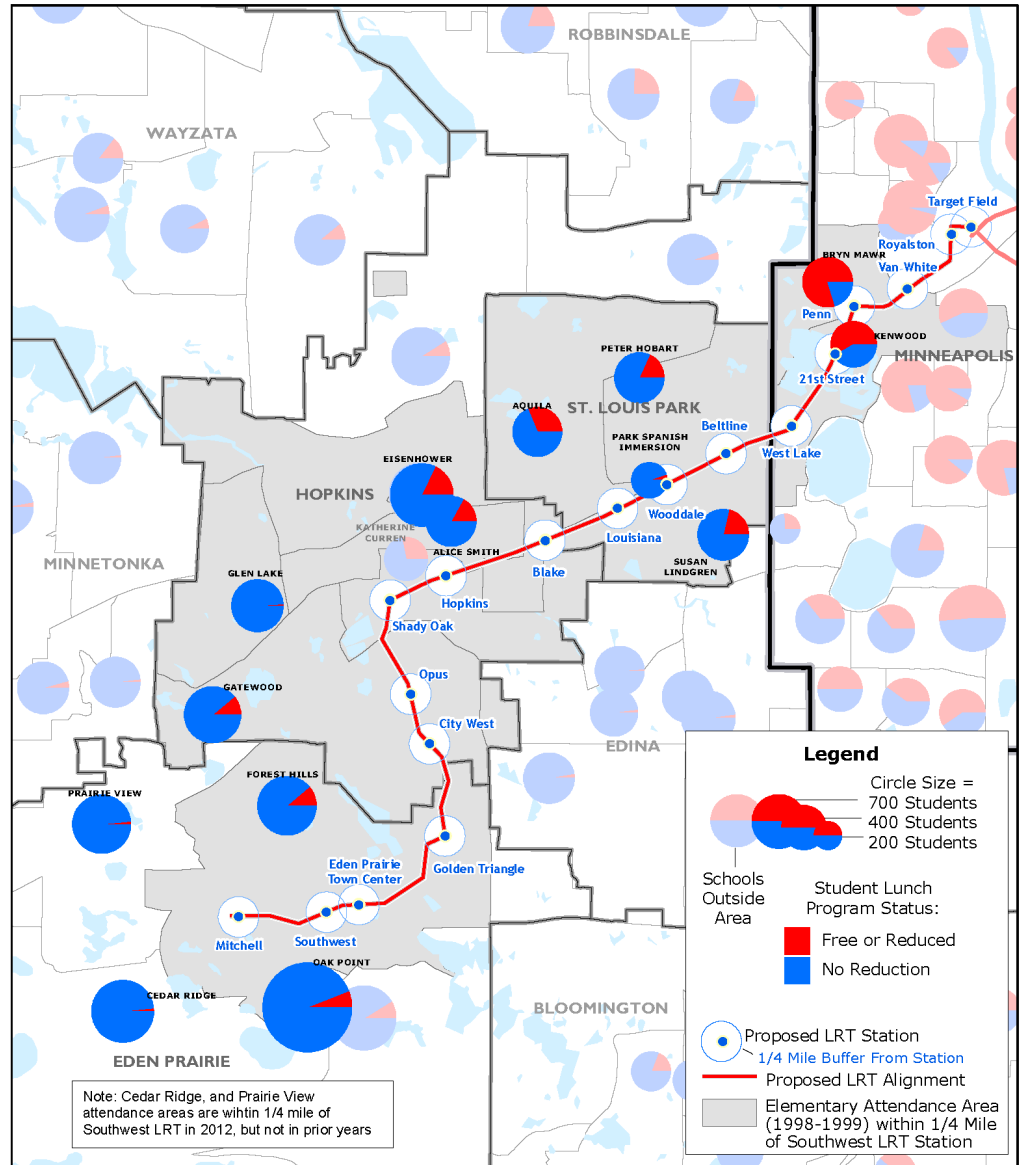
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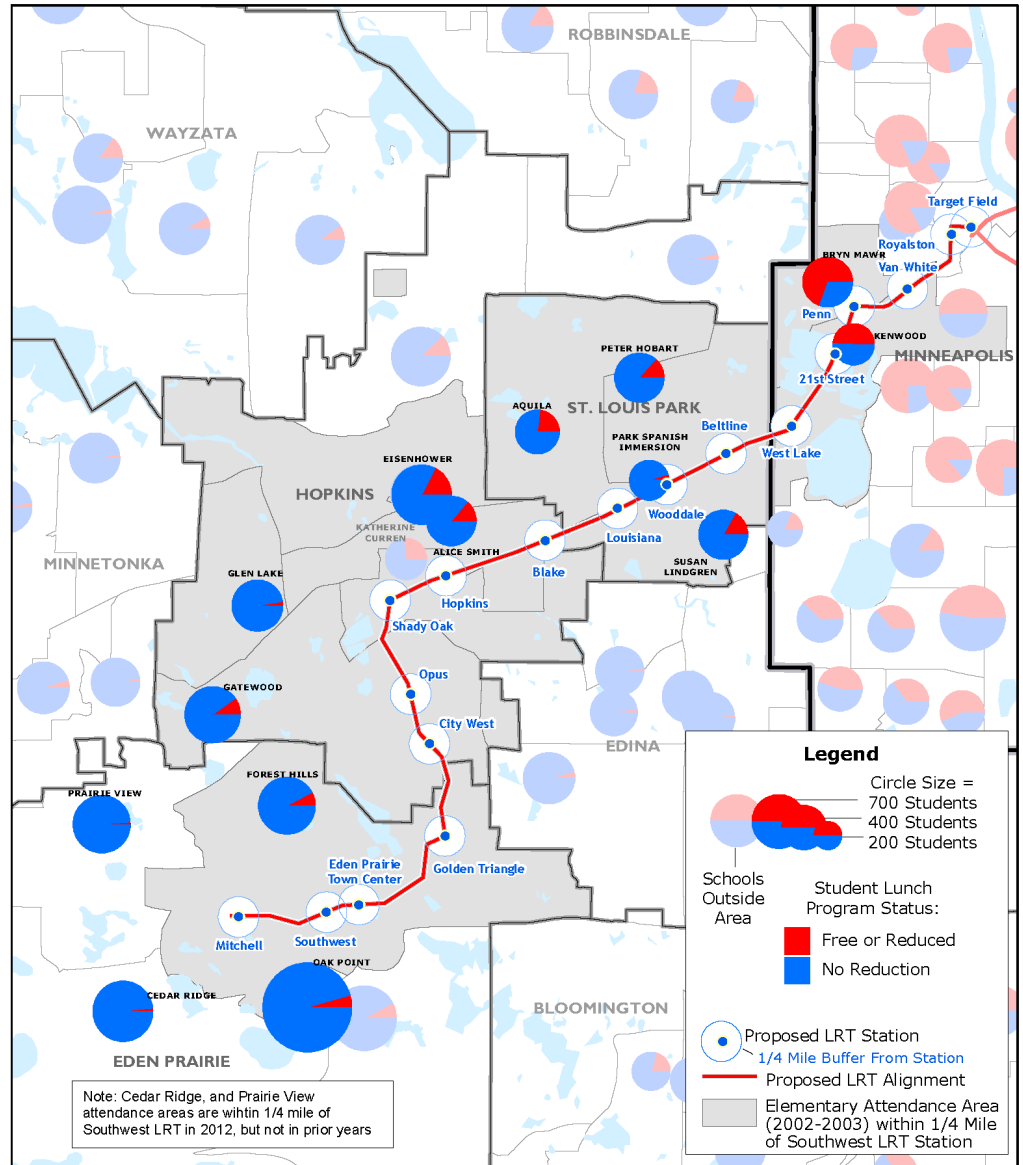
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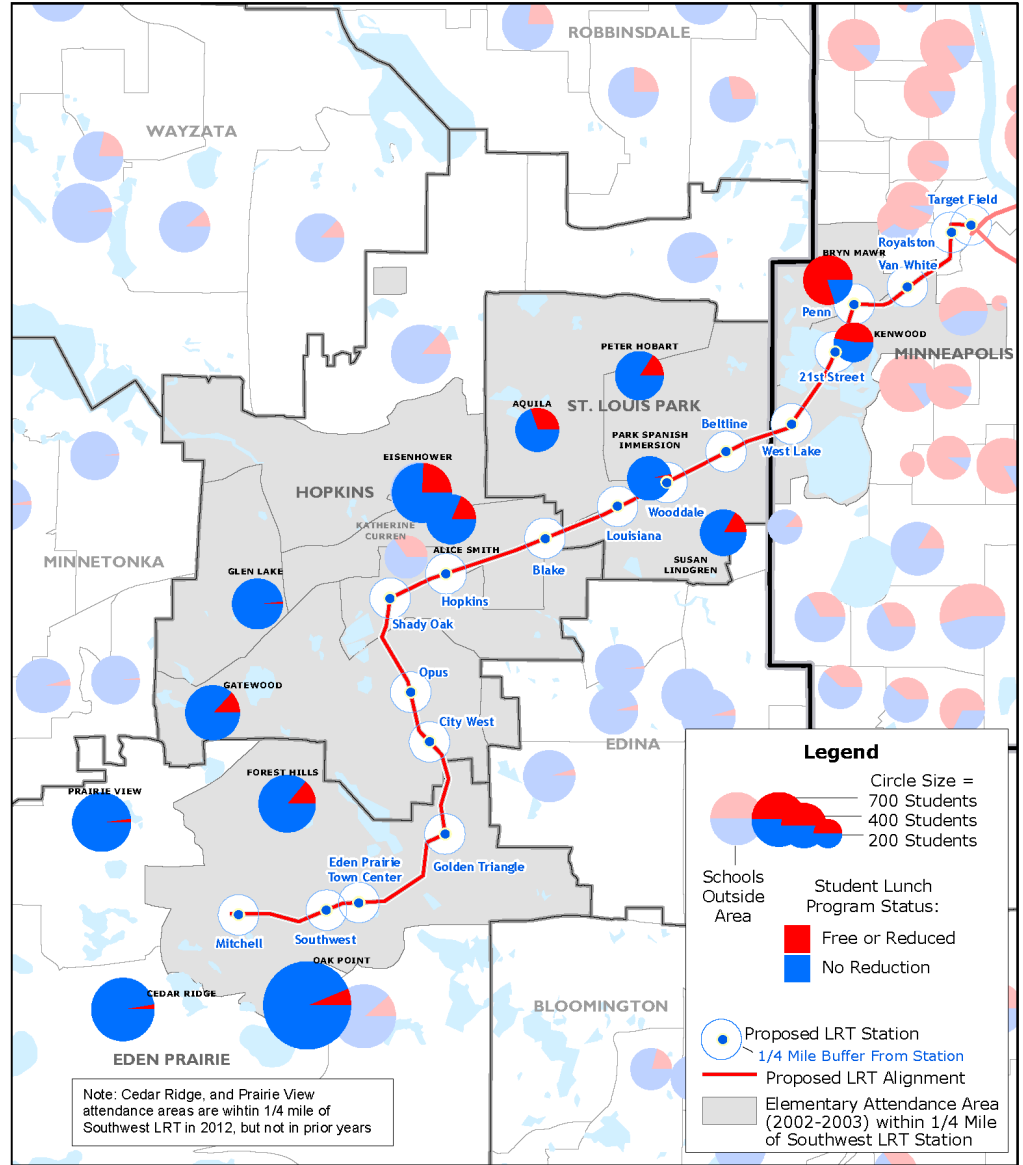


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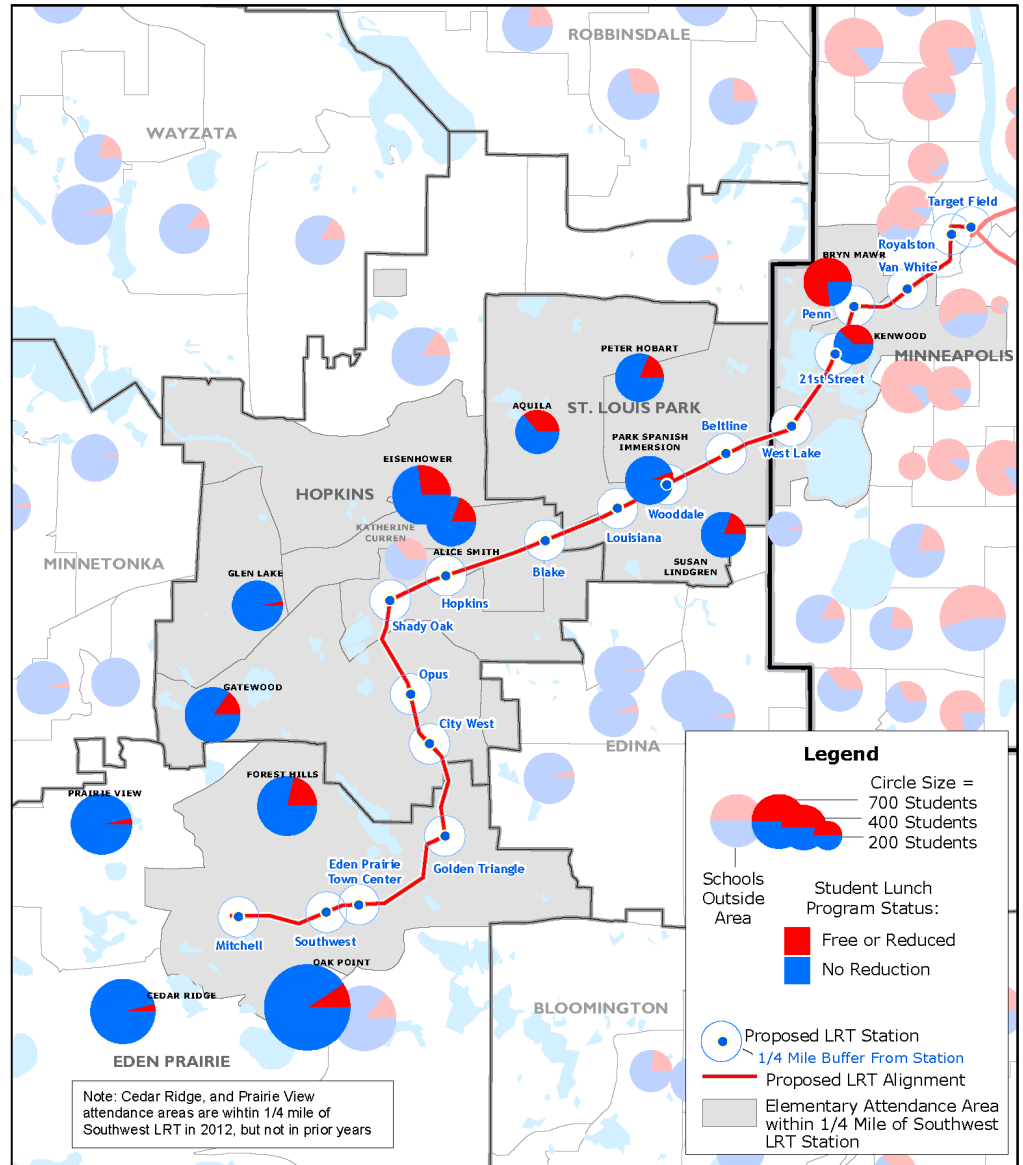
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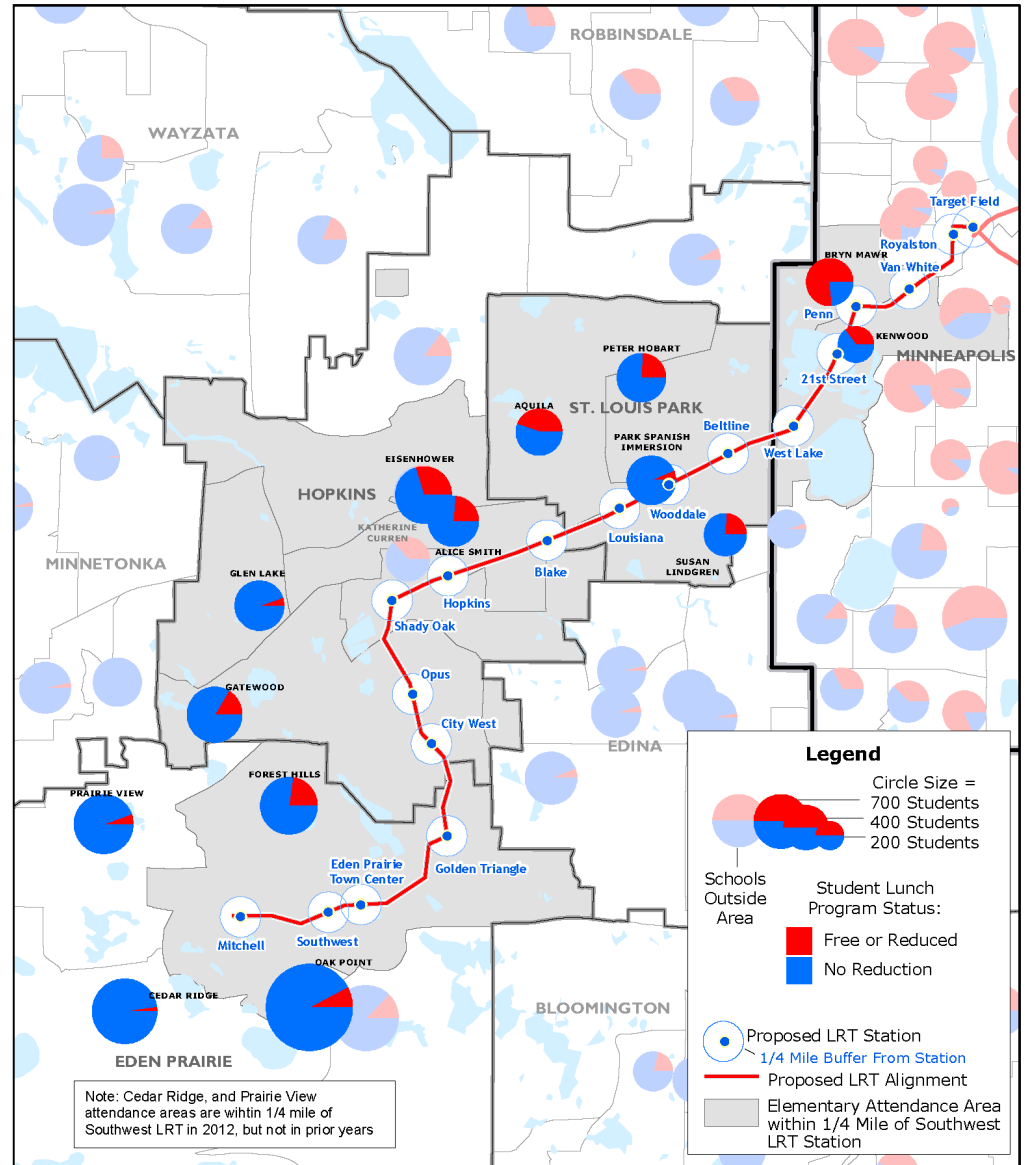
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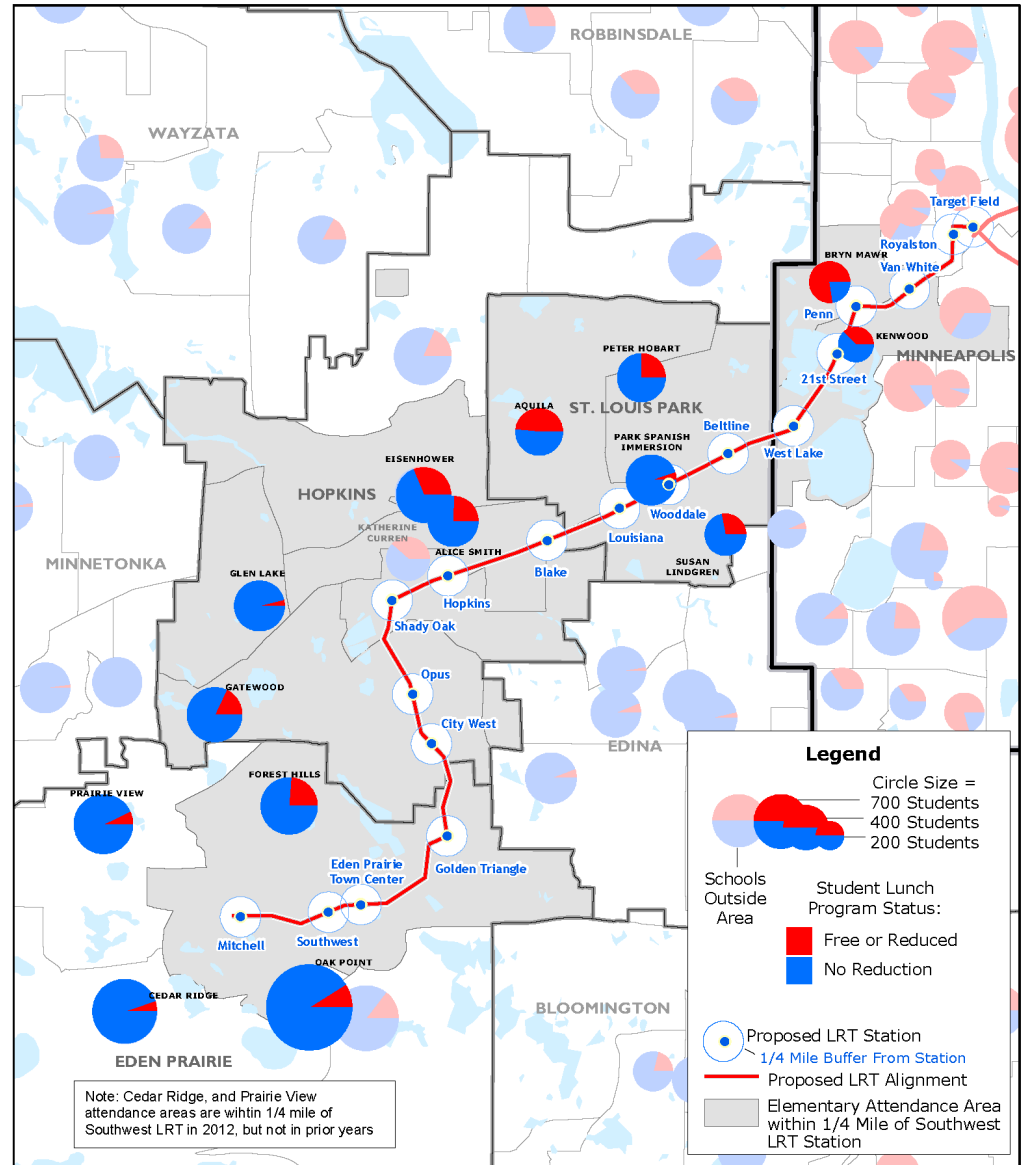
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in Elementary Schools for the School Year 2004-2005
Near Proposed Southwest Corridor Light Rail Transit



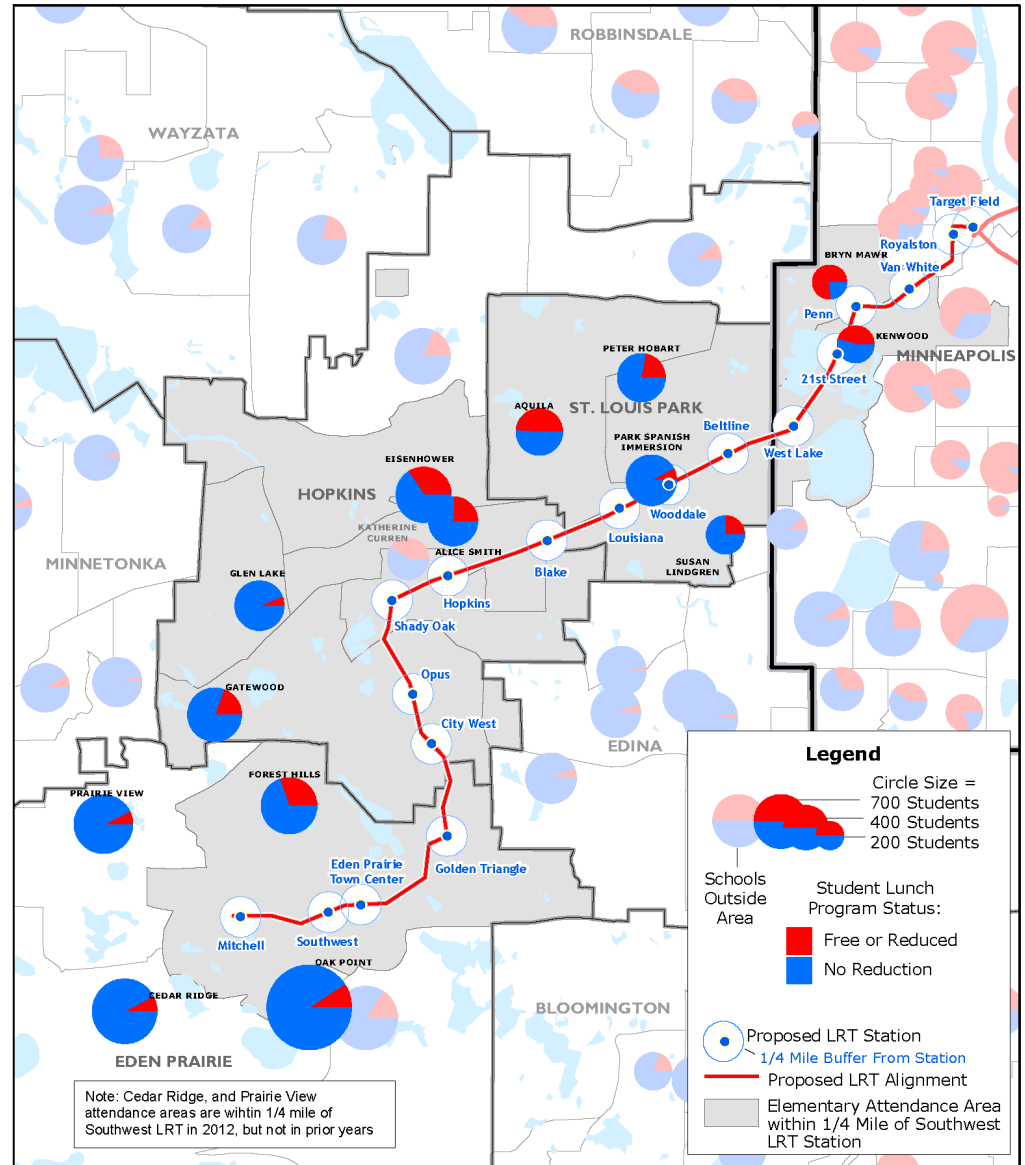
Data Source: Metropolitan Council, IRP, Minnesota Department of Education.



SOUTHWEST
 transitway



MINNEAPOLIS - SAINT PAUL SOUTHWEST REGION
Free and Reduced Lunch Eligibility of Students
in Elementary Schools for the School Year 2005-2006
Near Proposed Southwest Corridor Light Rail Transit

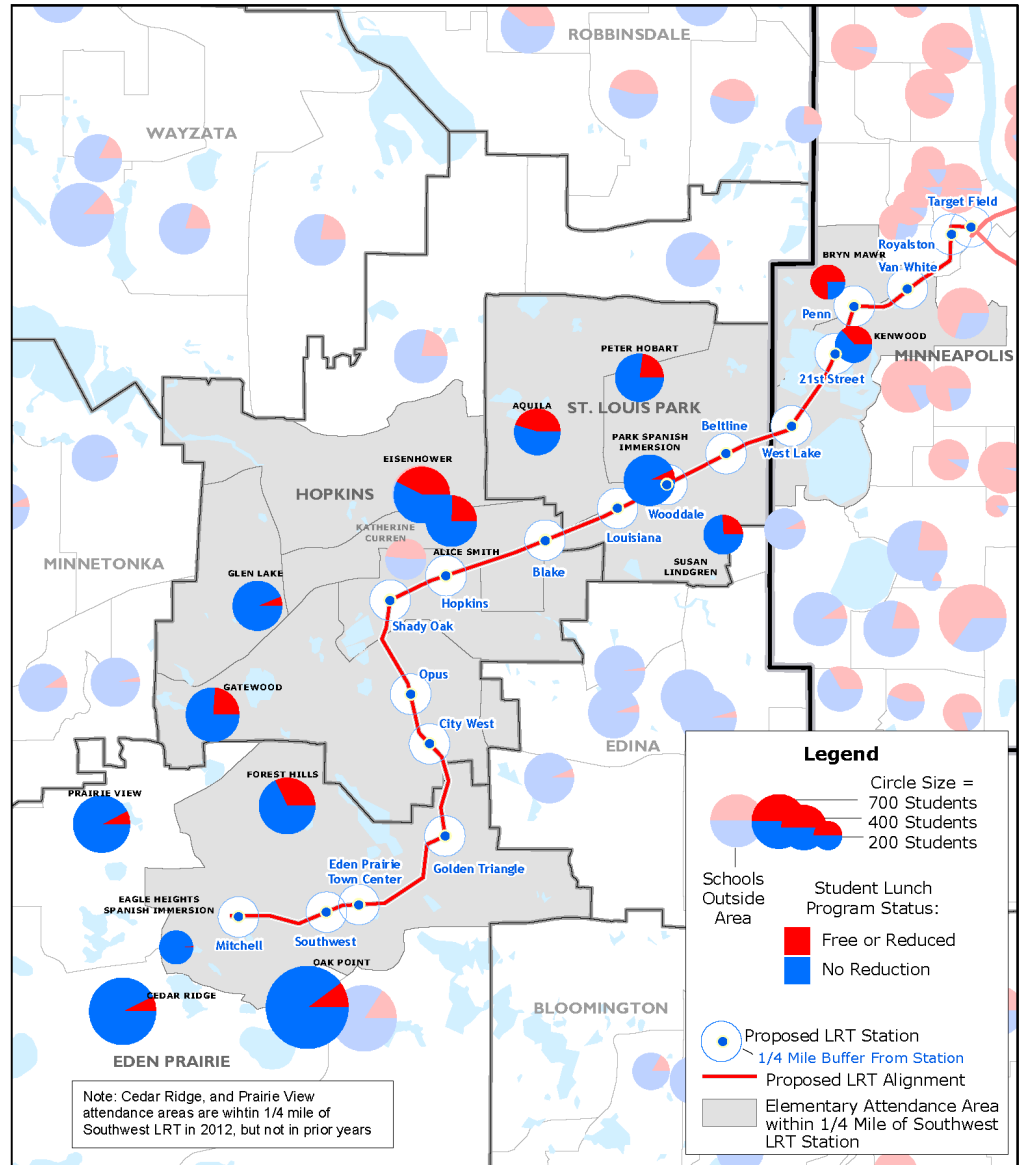


Data Source: Metropolitan Council, IRP, Minnesota Department of Education.





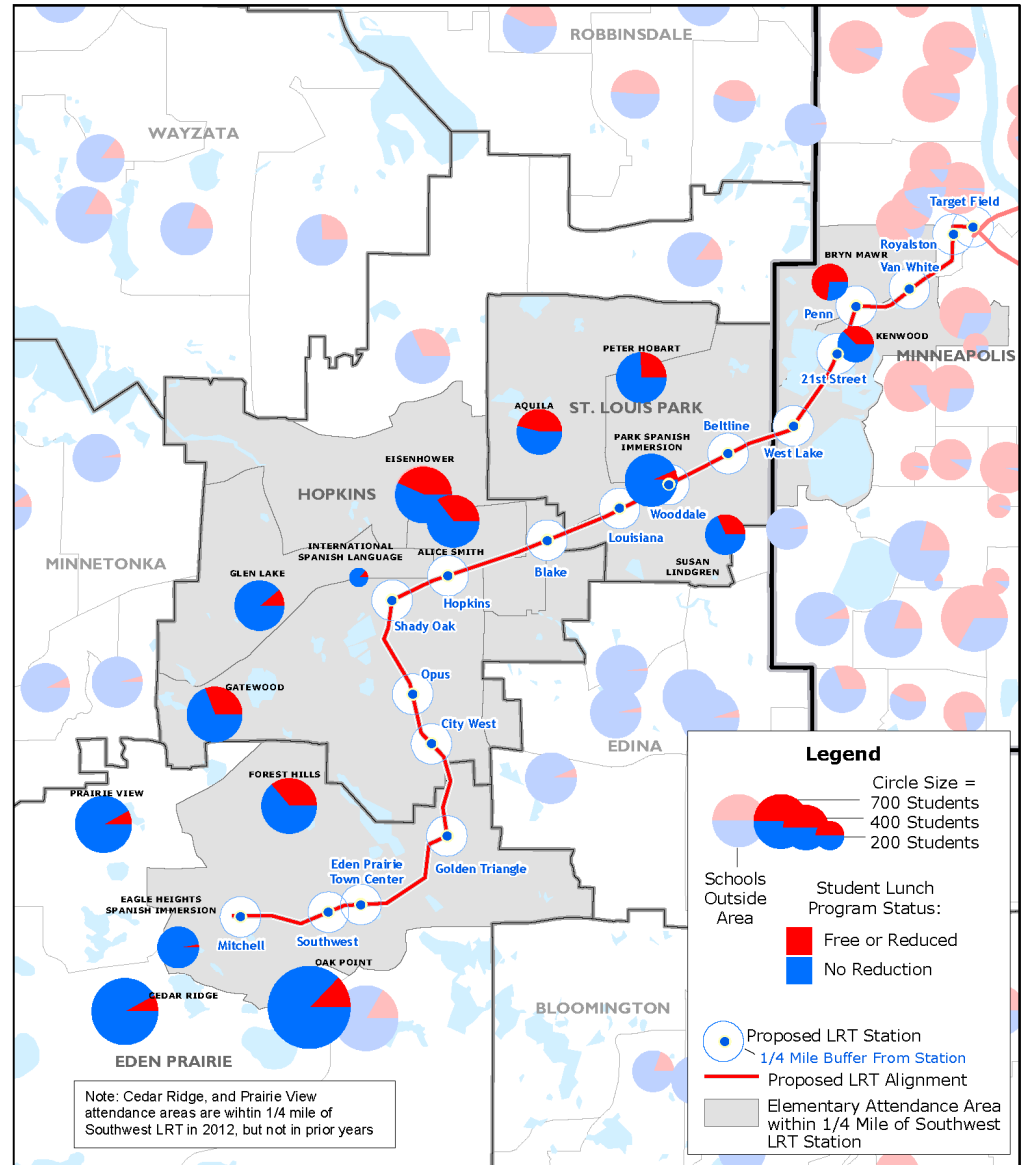
MINNEAPOLIS - SAINT PAUL SOUTHWEST REGION
Free and Reduced Lunch Eligibility of Students
in Elementary Schools for the School Year 2006-2007
Near Proposed Southwest Corridor Light Rail Transit



Data Source: Metropolitan Council, IRP, Minnesota Department of Education.



MINNEAPOLIS - SAINT PAUL SOUTHWEST REGION
Free and Reduced Lunch Eligibility of Students
in Elementary Schools for the School Year 2007-2008
Near Proposed Southwest Corridor Light Rail Transit

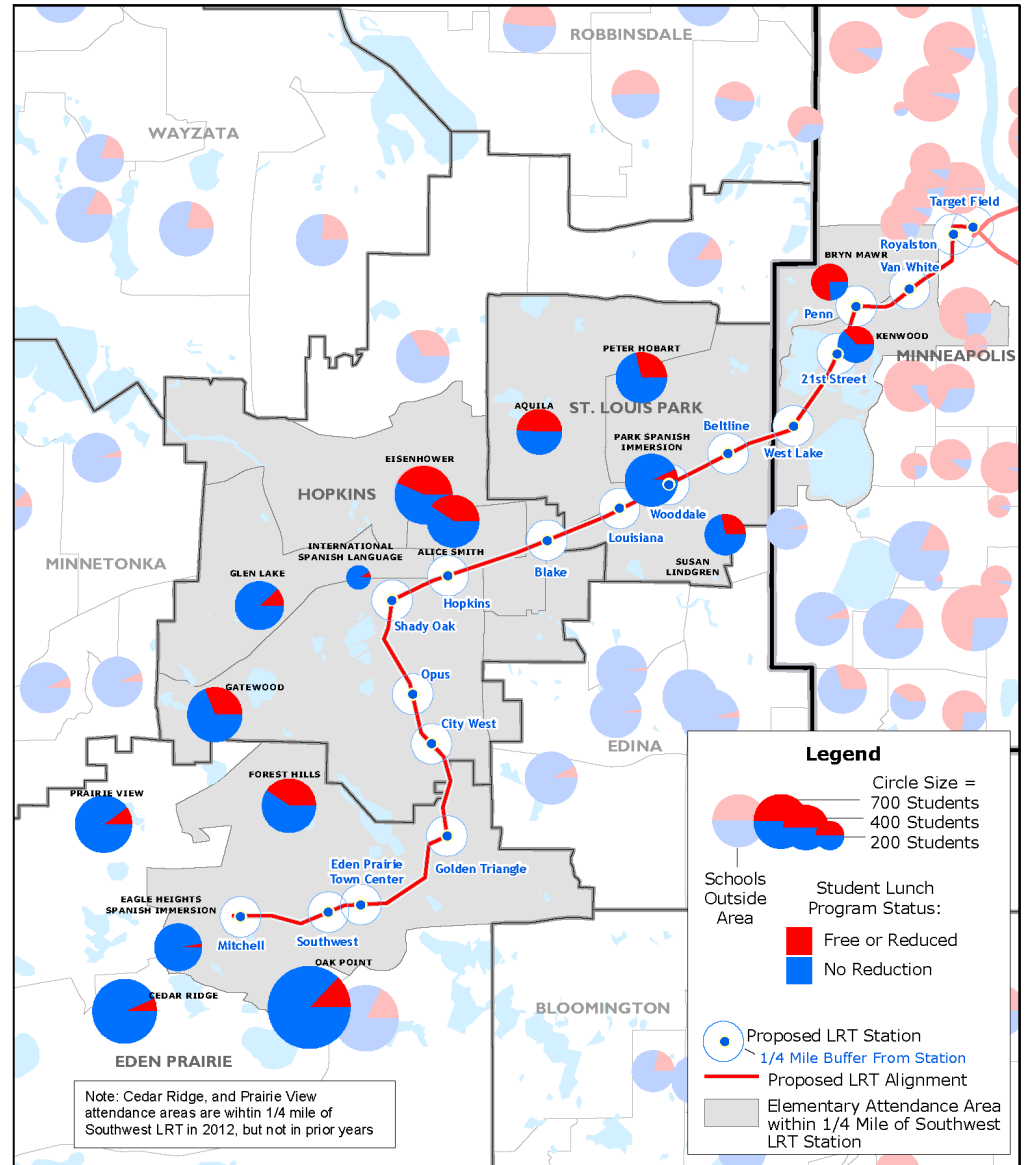


Data Source: Metropolitan Council, IRP, Minnesota Department of Education.





MINNEAPOLIS - SAINT PAUL SOUTHWEST REGION
Free and Reduced Lunch Eligibility of Students
in Elementary Schools for the School Year 2008-2009
Near Proposed Southwest Corridor Light Rail Transit

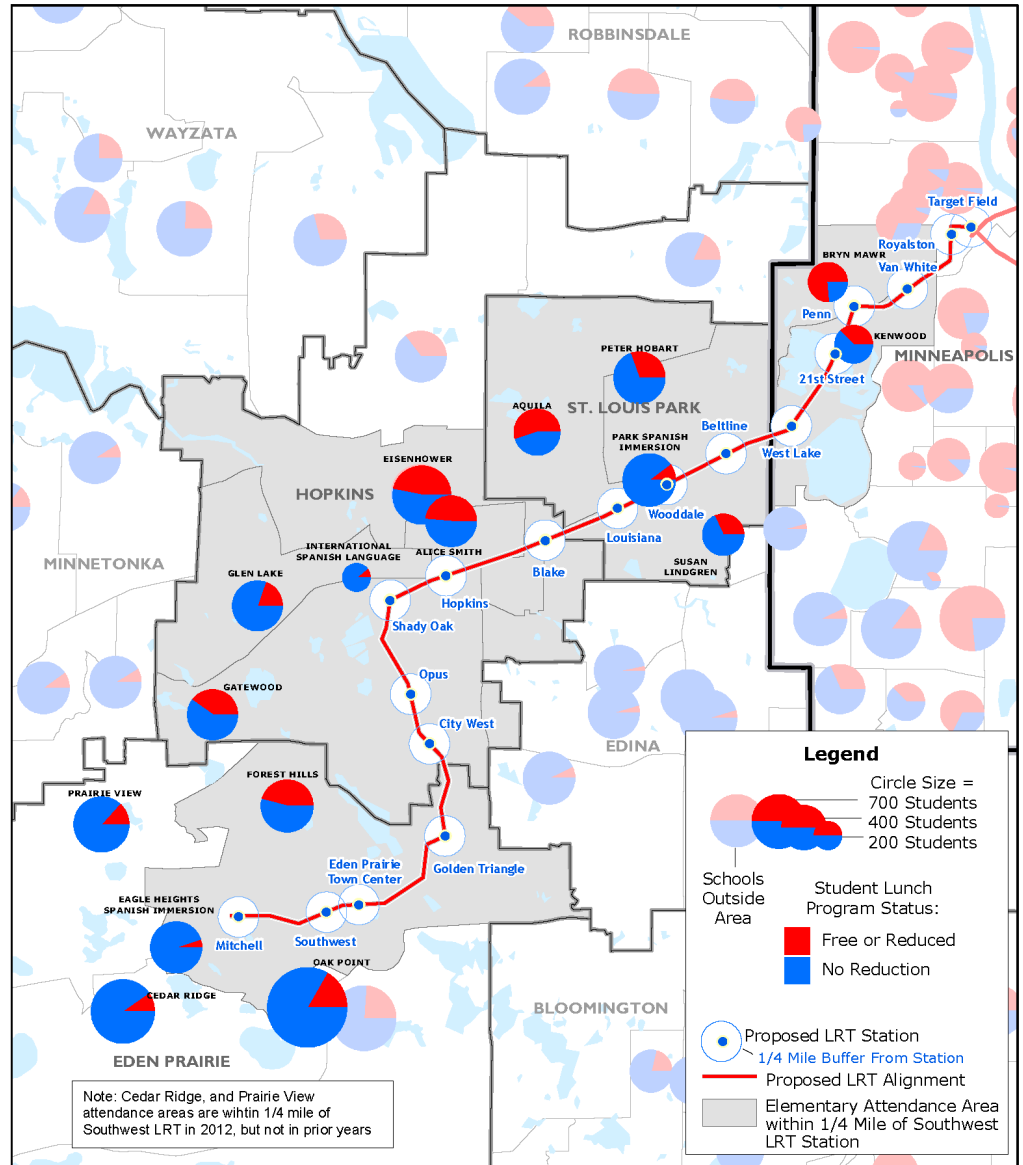


Data Source: Metropolitan Council, IRP, Minnesota Department of Education.





MINNEAPOLIS - SAINT PAUL SOUTHWEST REGION
Free and Reduced Lunch Eligibility of Students
in Elementary Schools for the School Year 2009-2010
Near Proposed Southwest Corridor Light Rail Transit

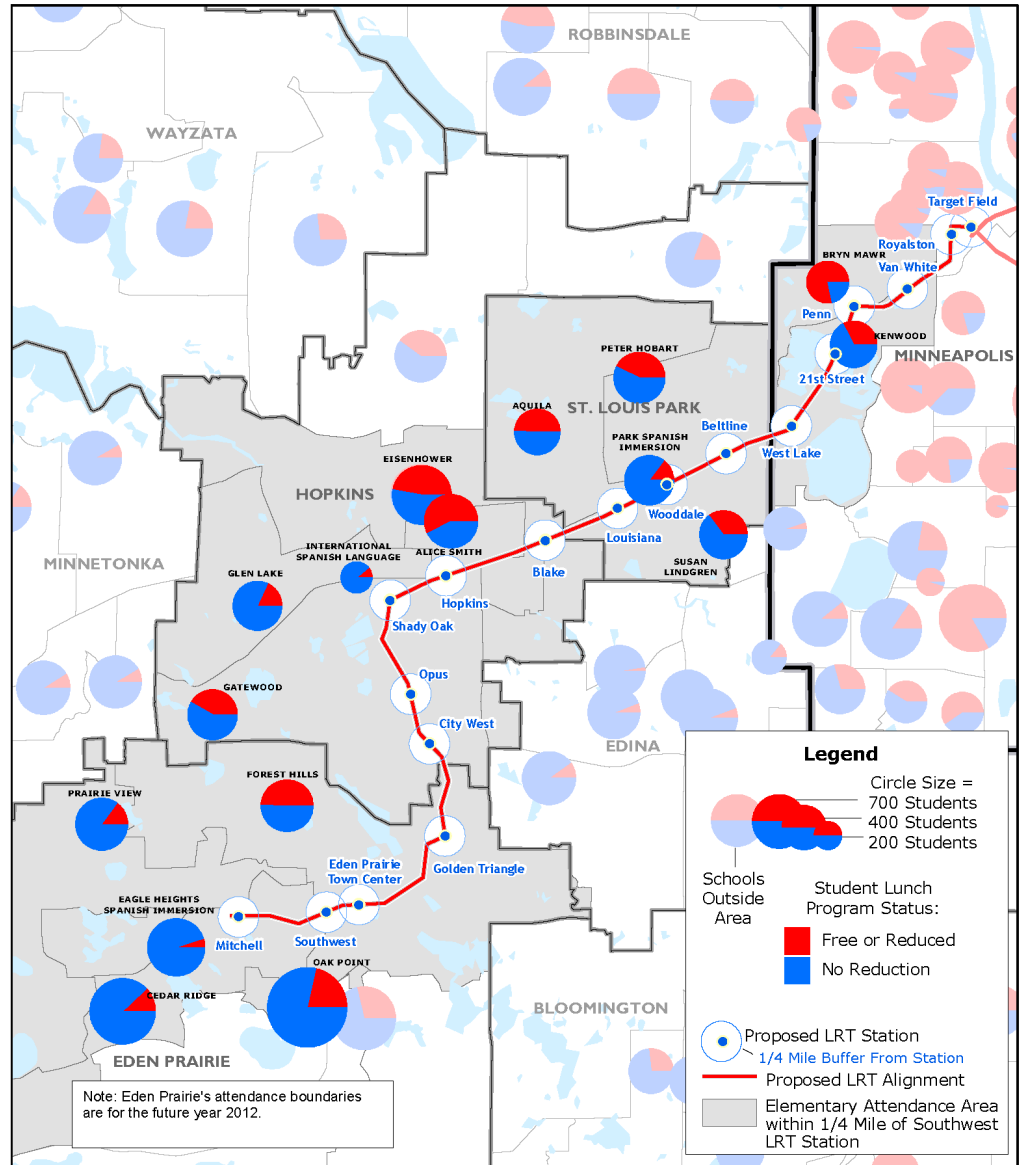


Data Source: Metropolitan Council, IRP, Minnesota Department of Education.





MINNEAPOLIS - SAINT PAUL SOUTHWEST REGION
Free and Reduced Lunch Eligibility of Students
in Elementary Schools for the School Year 2010-2011
Near Proposed Southwest Corridor Light Rail Transit

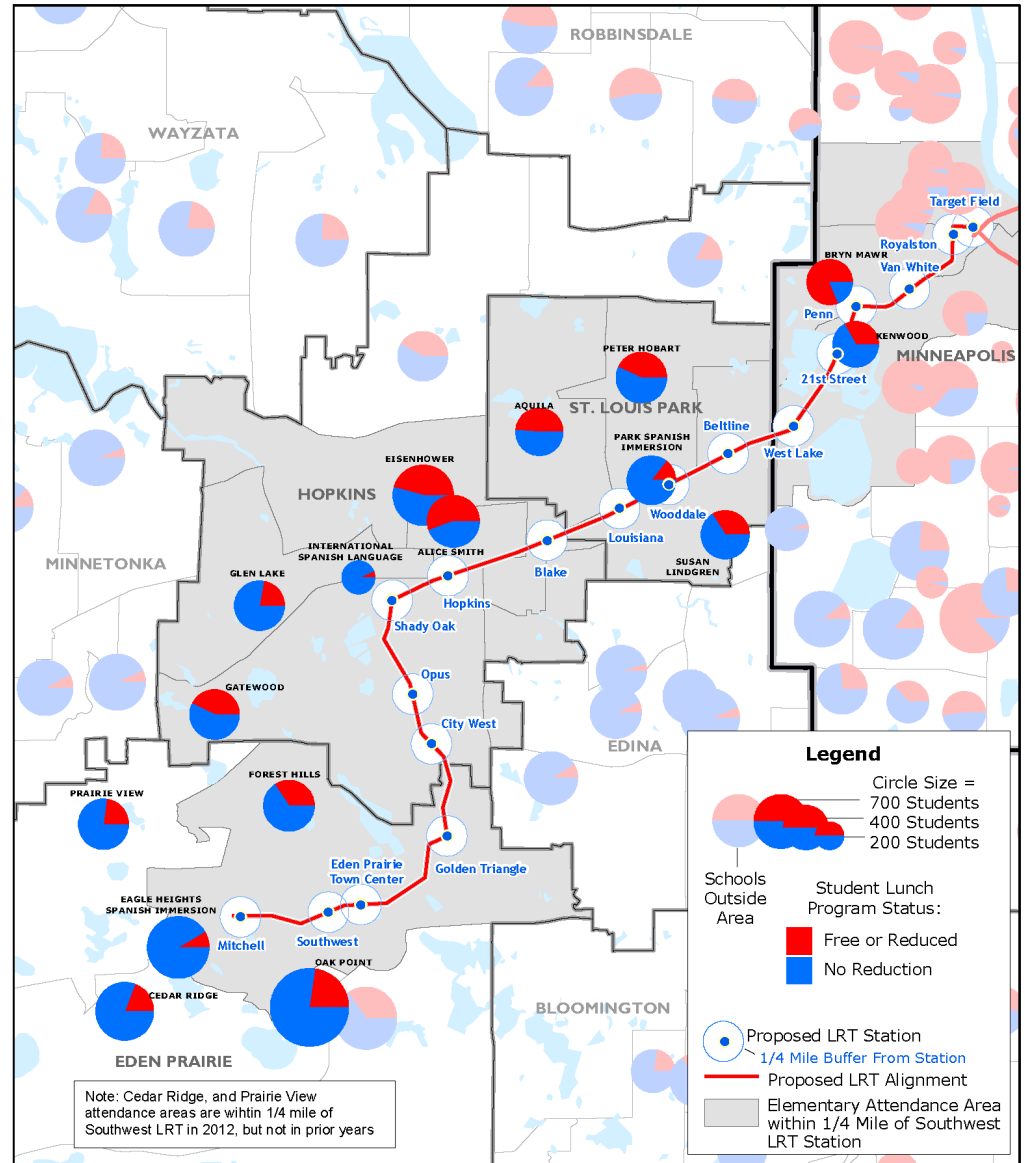


Data Source: Metropolitan Council, IRP, Minnesota Department of Education.





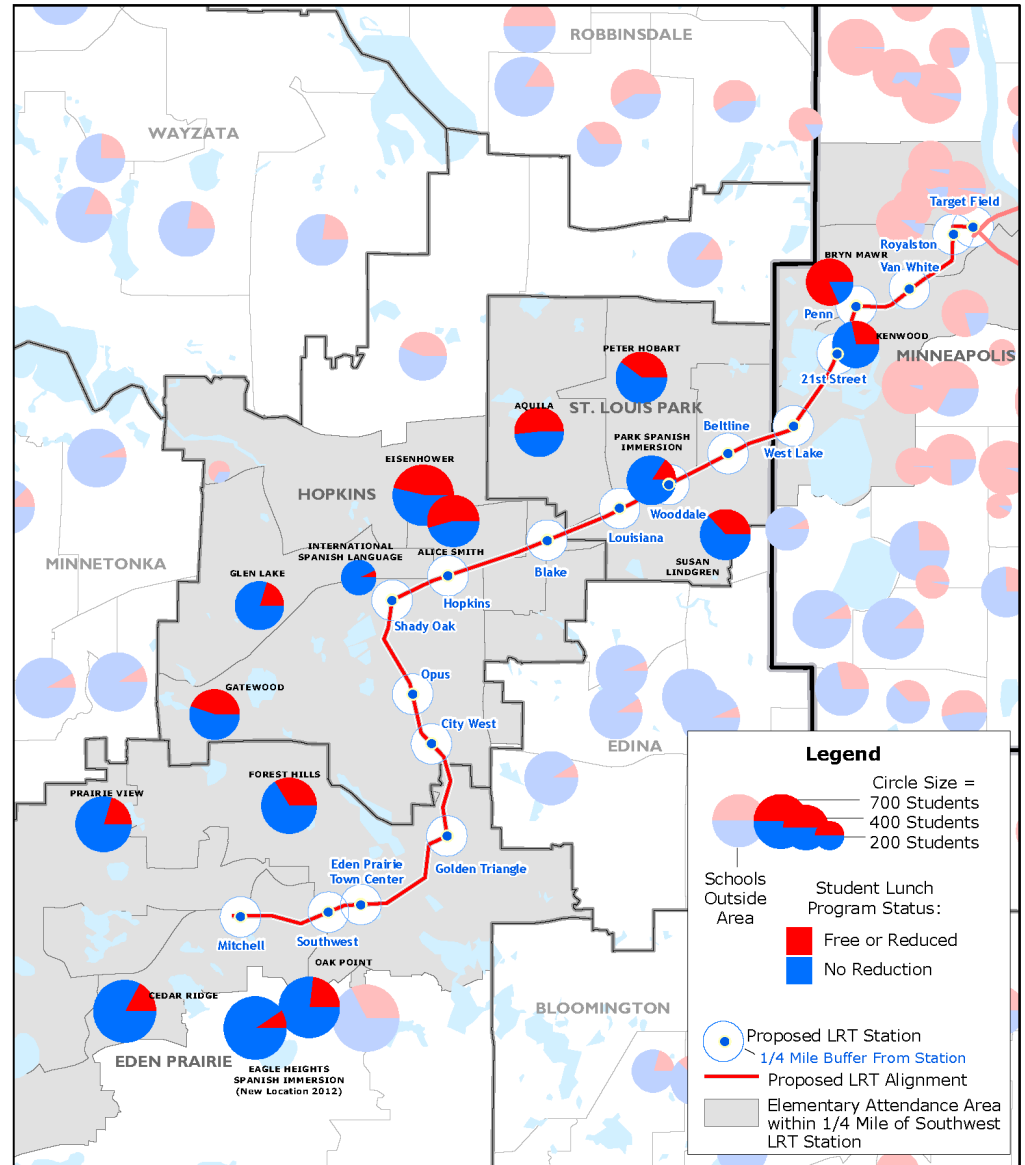
MINNEAPOLIS - SAINT PAUL SOUTHWEST REGION
Free and Reduced Lunch Eligibility of Students
in Elementary Schools for the School Year 2011-2012
Near Proposed Southwest Corridor Light Rail Transit



Data Source: Metropolitan Council, IRP, Minnesota Department of Education.



MINNEAPOLIS - SAINT PAUL SOUTHWEST REGION
Free and Reduced Lunch Eligibility of Students
in Elementary Schools for the School Year 2012-2013
Near Proposed Southwest Corridor Light Rail Transit



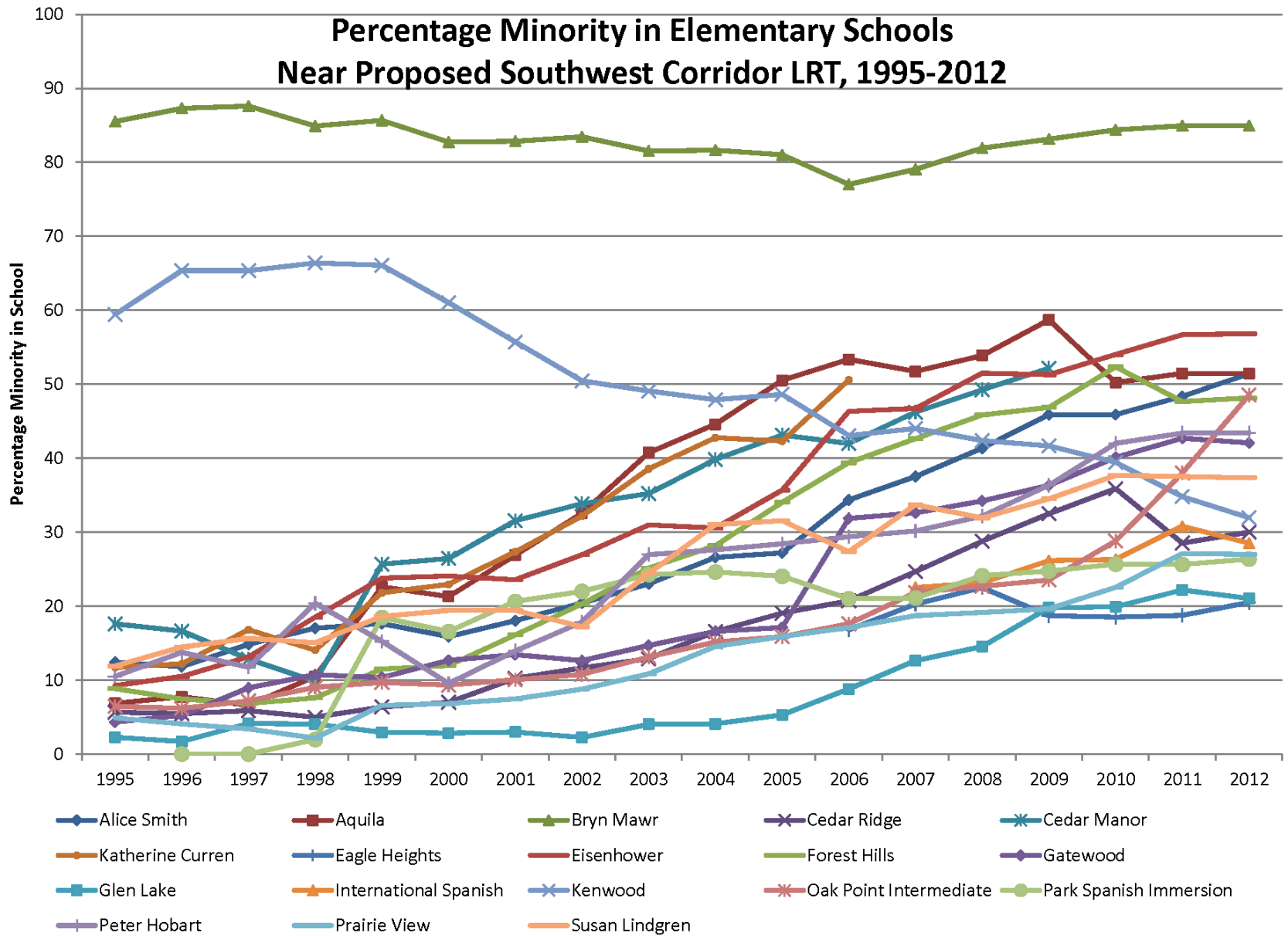
Data Source: Metropolitan Council, IRP, Minnesota Department of Education.



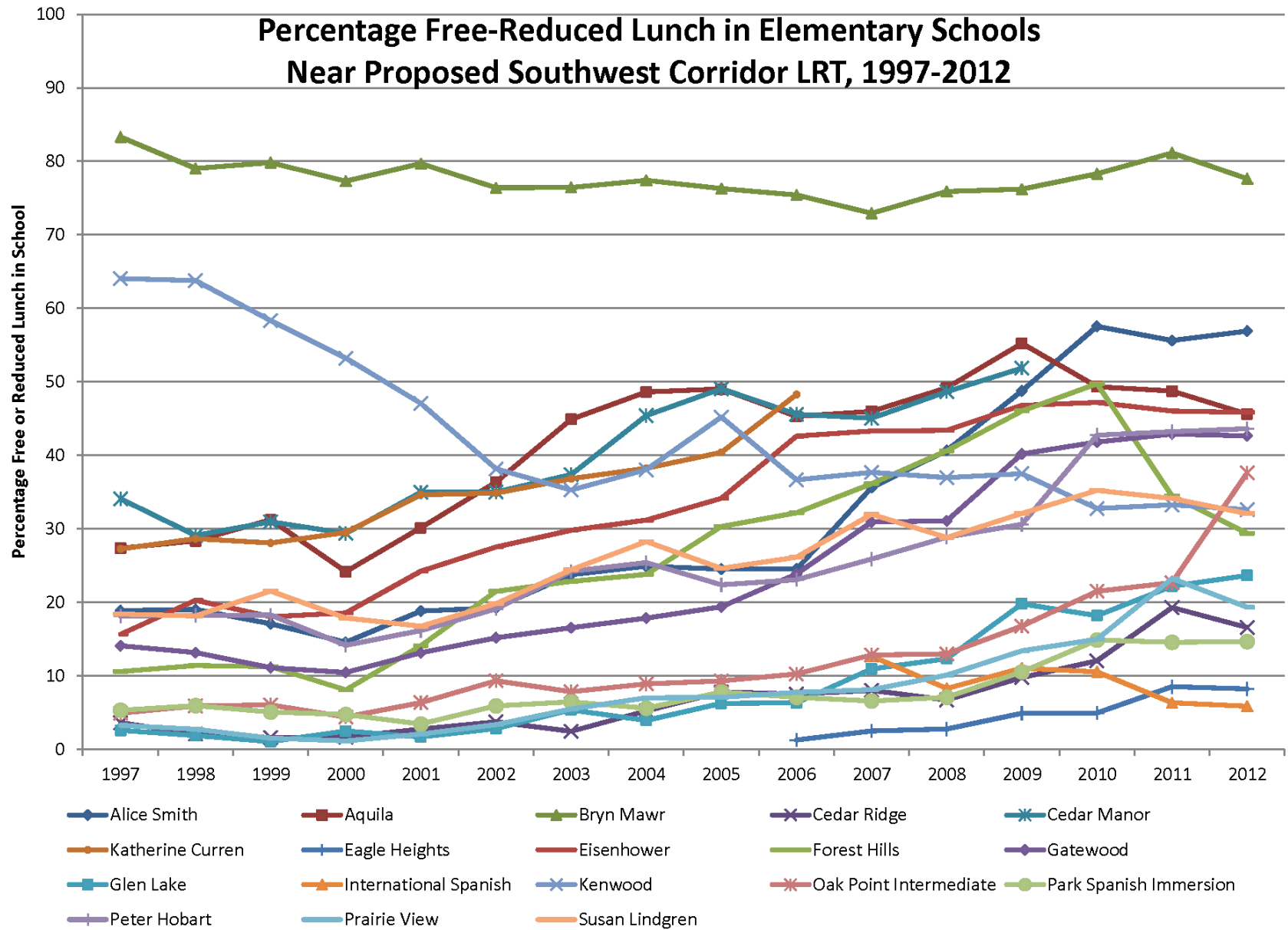


Southwest Corridor LRT Race and Lunch Program Trends

Percentage Minority in Elementary Schools Near Proposed Southwest Corridor LRT, 1995-2012

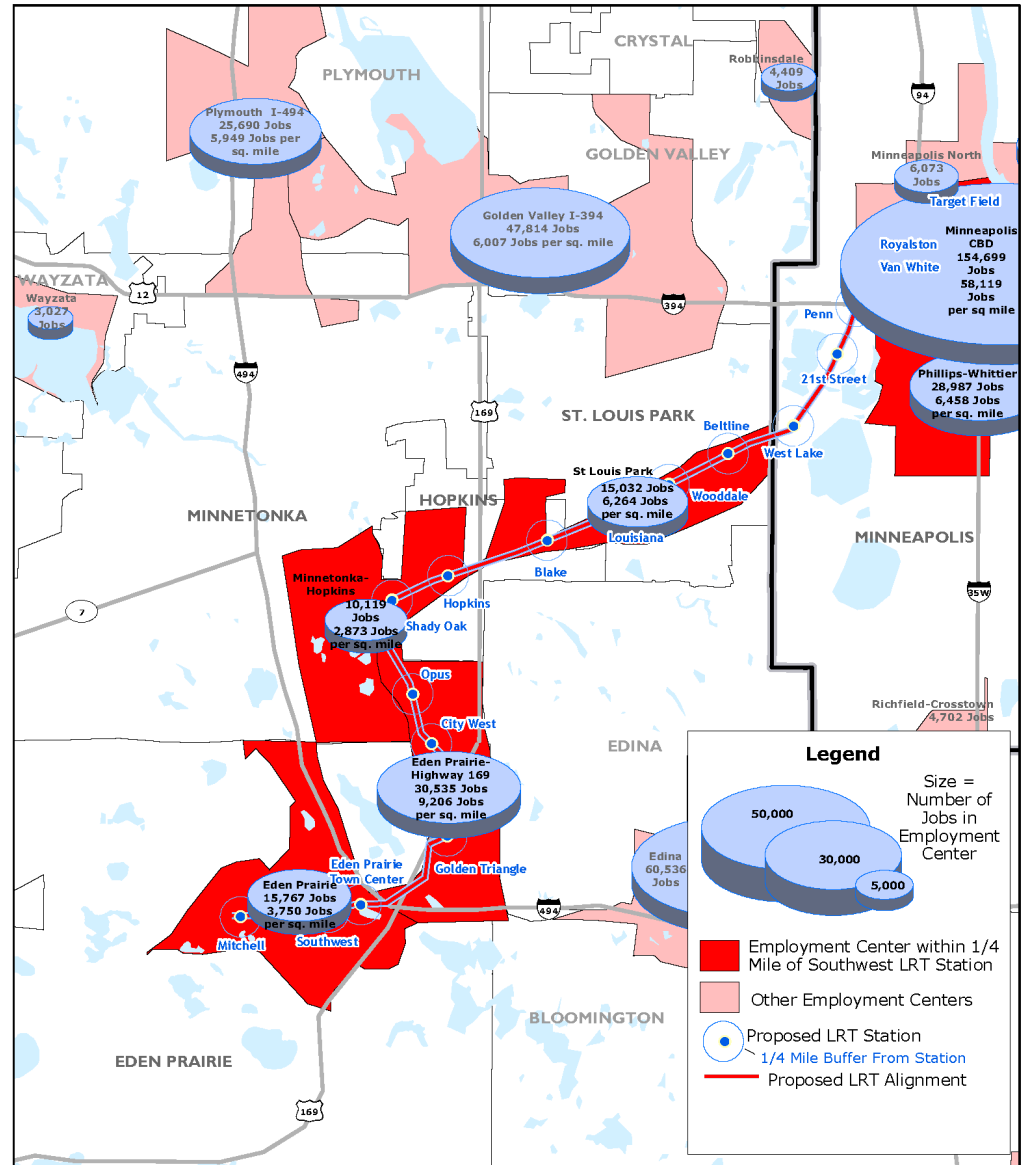


Percentage Free-Reduced Lunch in Elementary Schools Near Proposed Southwest Corridor LRT, 1997-2012





MINNEAPOLIS - SAINT PAUL SOUTHWEST REGION
Jobs in Employment Centers, 2009
Near Proposed Southwest Corridor Light Rail Transit



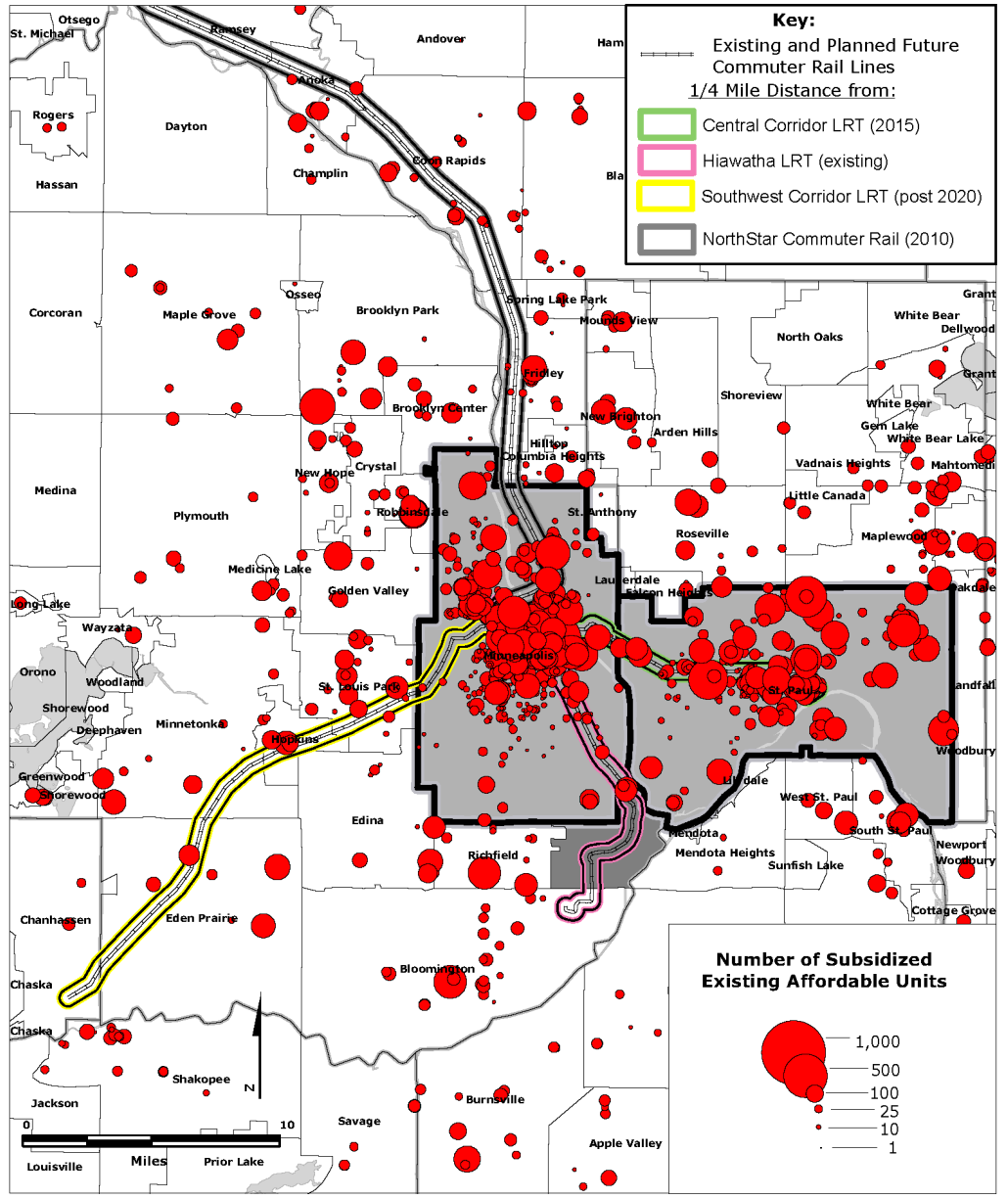
Data Source: Metropolitan Council, IRP, U.S. Census Bureau, Longitudinal Employer Household Dynamics



Subsidized - Affordable Housing and Transit Corridors



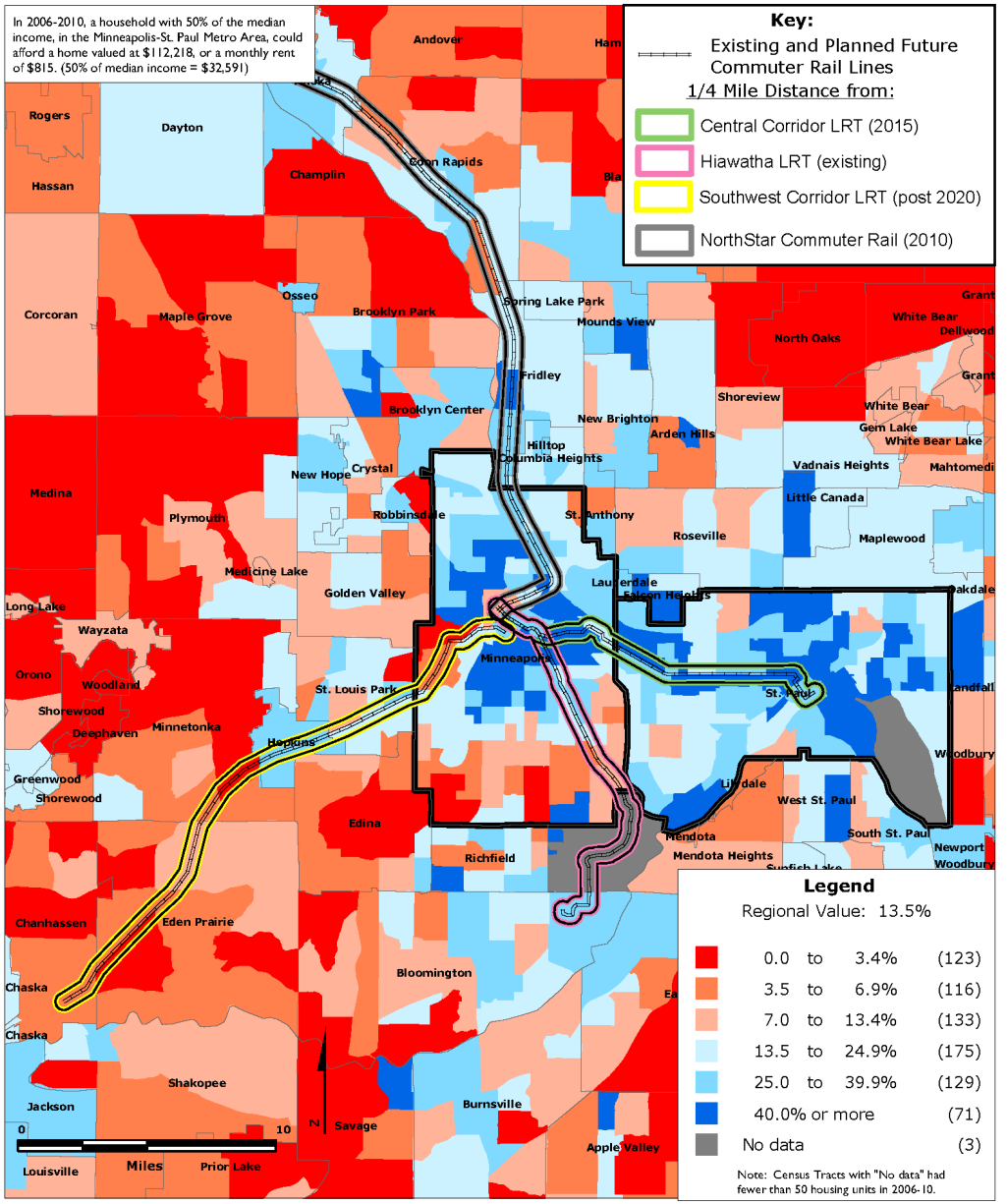
MINNEAPOLIS - SAINT PAUL (Central Region) Existing Subsidized Housing (2012) and Planned or Existing Light Rail (LRT) and Commuter Rail



Data Source: Metropolitan Council and HousingLink



MINNEAPOLIS - SAINT PAUL (Central Region)
Percentage of Housing Units Affordable to Households
at 50% of the Regional Median Income (2006-10) and
Existing or Planned Light Rail (LRT) and Commuter Rail

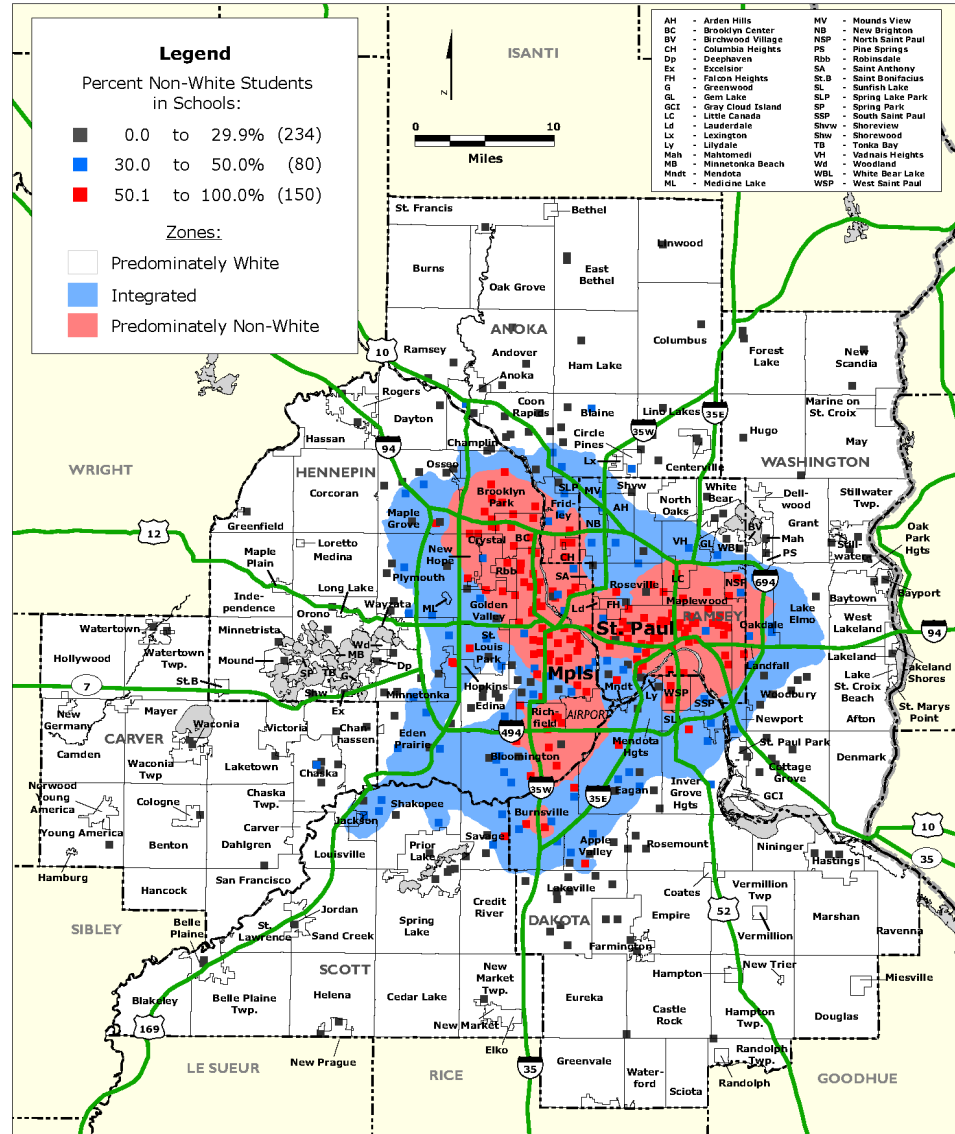




Past and Future LCA Goals



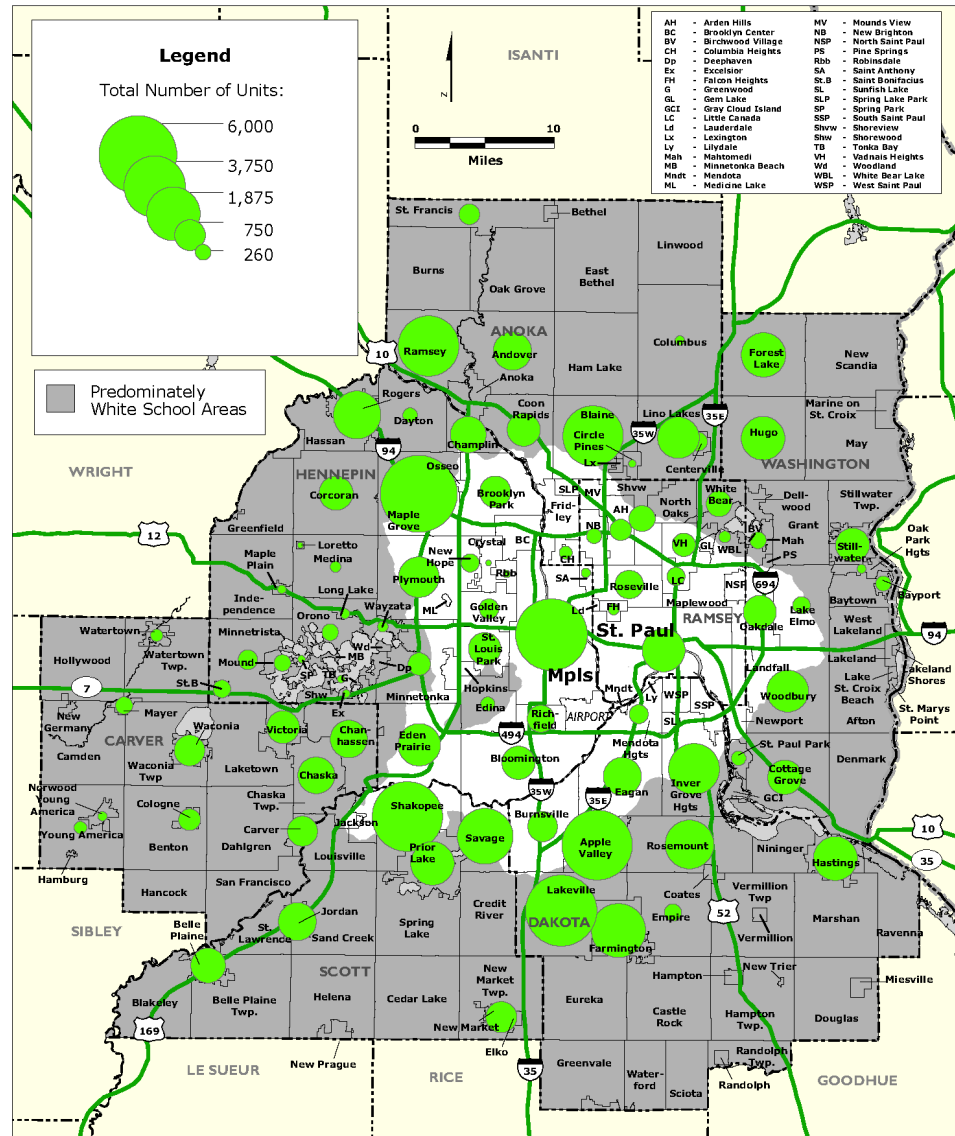
MINNEAPOLIS - SAINT PAUL REGION Racial Composition of Public Elementary Schools, 2013



Data Source: Minnesota Department of Education.



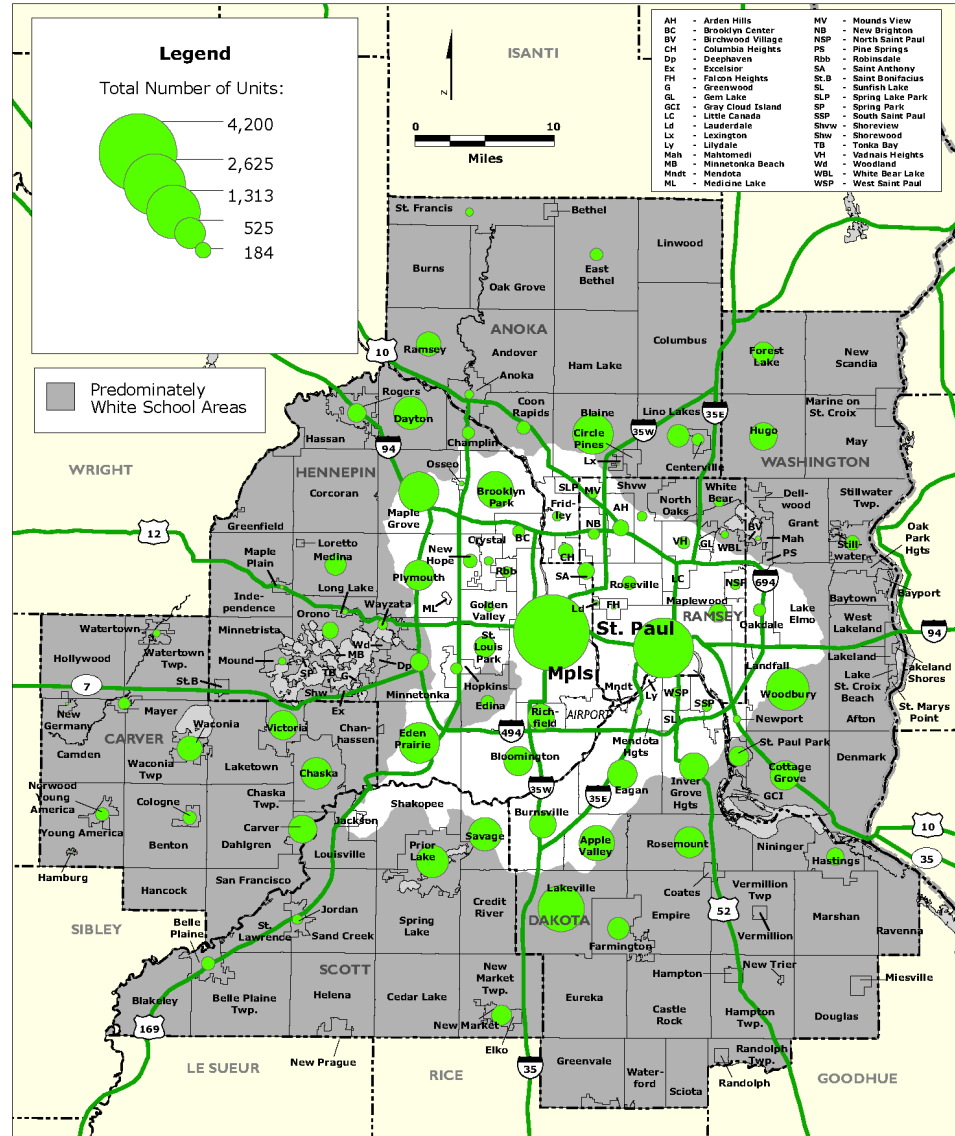
MINNEAPOLIS - SAINT PAUL REGION Affordable Housing Goals for the Livable Communities Act, 1996-2010



Data Source: Metropolitan Council, TCHousingPolicy.org.



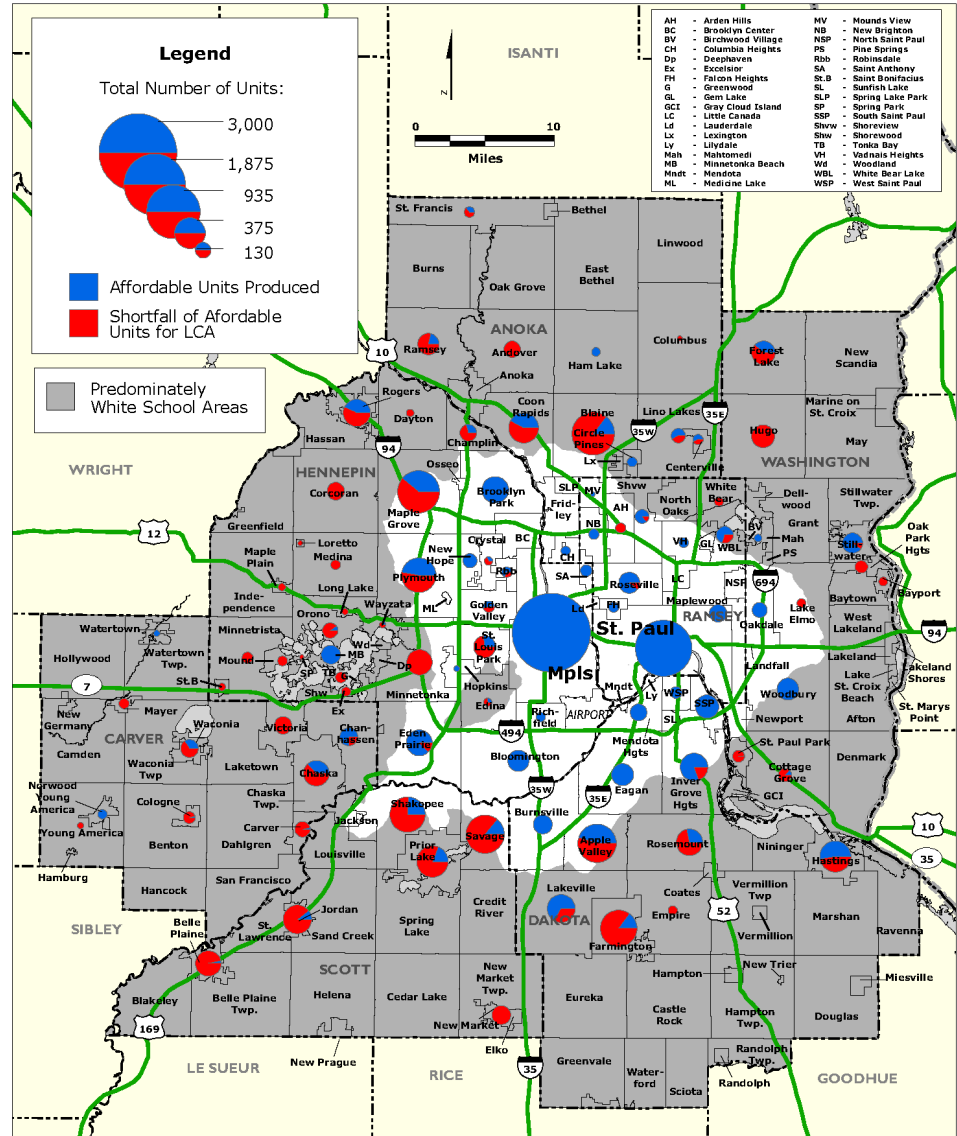
MINNEAPOLIS - SAINT PAUL REGION Affordable Housing Goals for the Livable Communities Act, 2011 to 2020



Data Source: Metropolitan Council, TCHousingPolicy.org.



MINNEAPOLIS - SAINT PAUL REGION Affordable Rental Housing Production and Shortfall from LCA Goals, 1996-2010

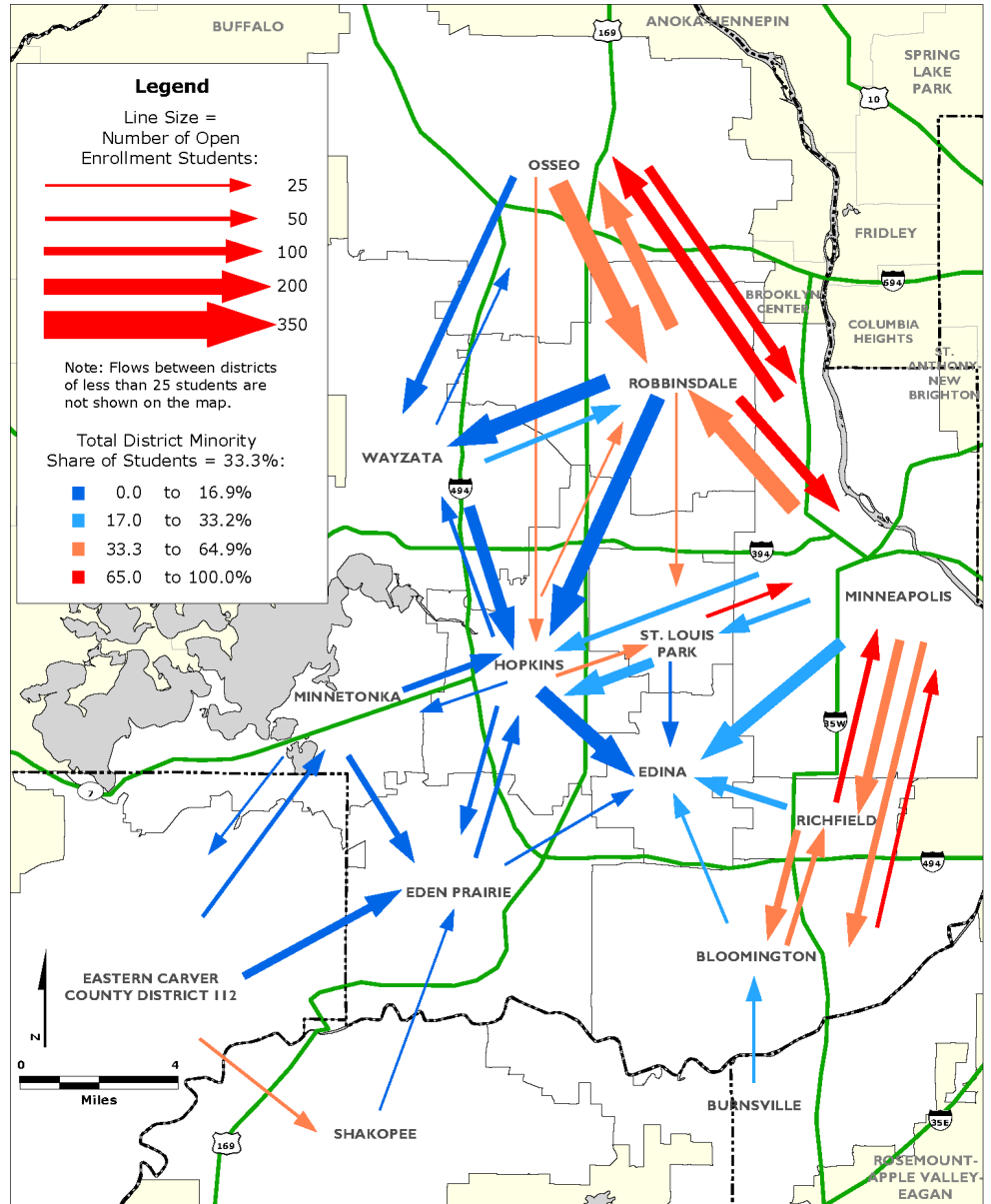


Data Source: Metropolitan Council, TCHousingPolicy.org.



Southwest Metro Open Enrollment Trends

**MINNEAPOLIS - SAINT PAUL SOUTHWEST REGION
Percentage Minority Students in Open Enrollment Flows,
Southwest Twin Cities School Districts, 2000-2001**

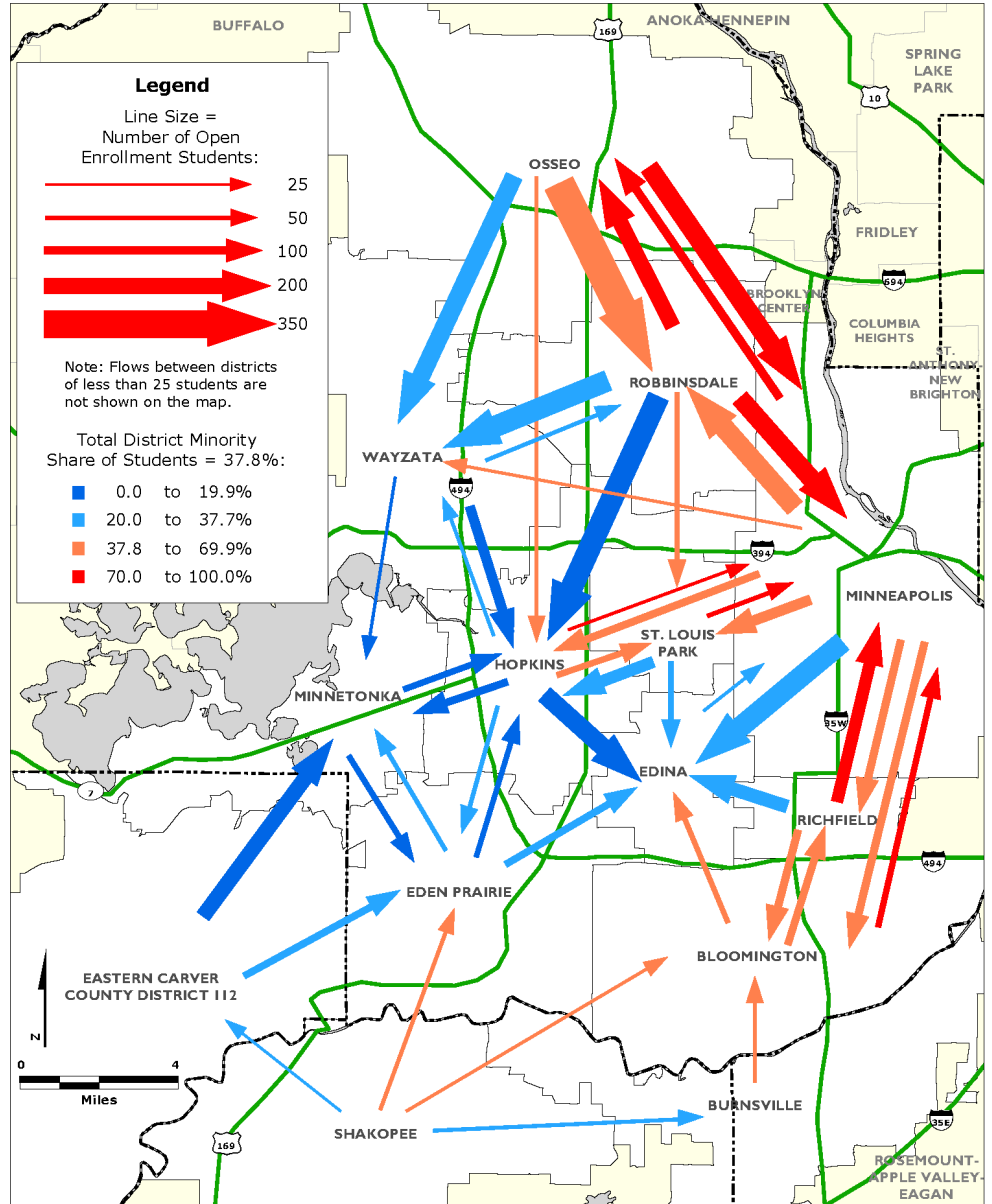


Data Source: Minnesota Department of Education; MN-Link.



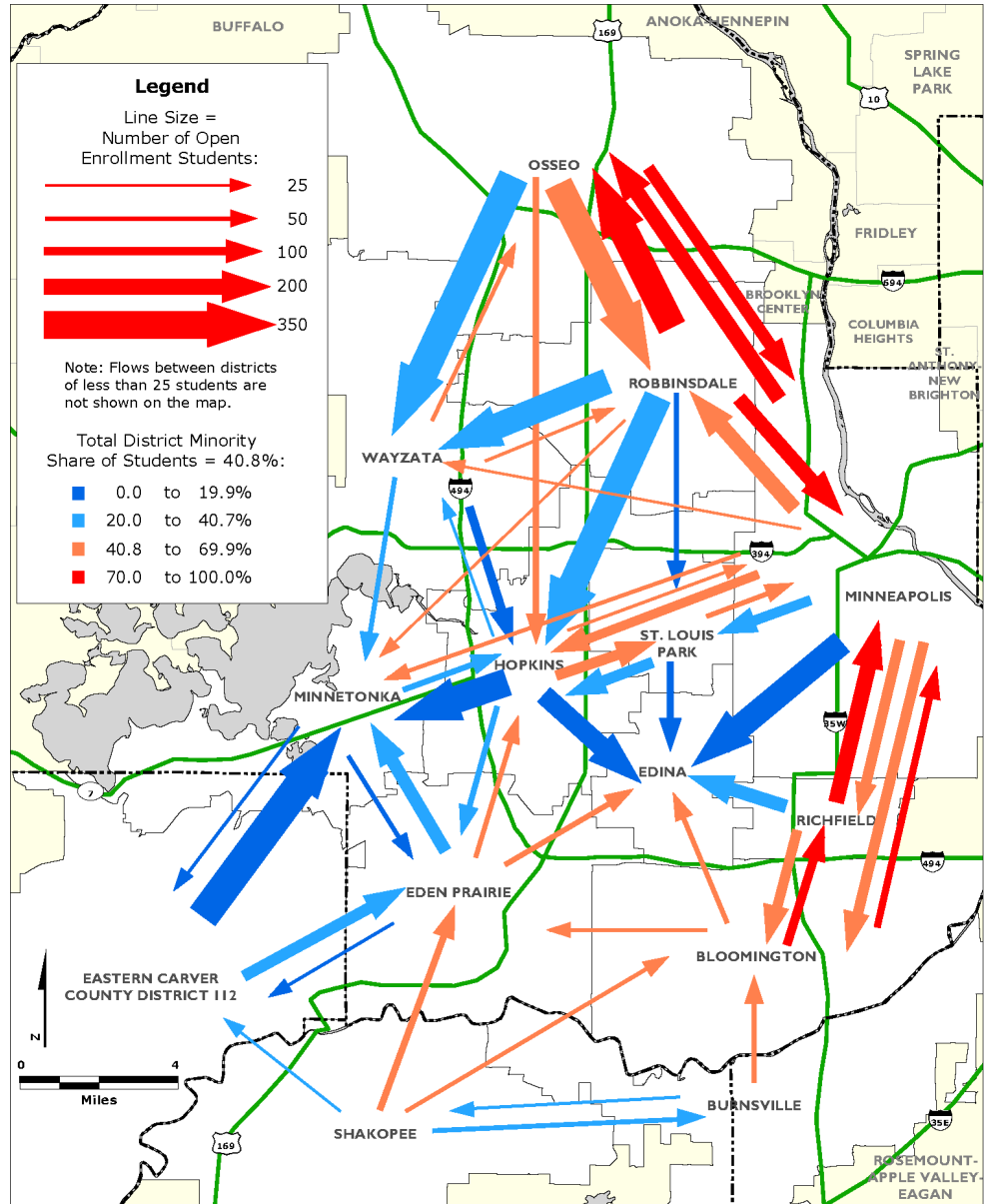


**MINNEAPOLIS - SAINT PAUL SOUTHWEST REGION
Percentage Minority Students in Open Enrollment Flows,
Southwest Twin Cities School Districts, 2005-2006**



Data Source: Minnesota Department of Education; MN-Link.

**MINNEAPOLIS - SAINT PAUL SOUTHWEST REGION
Percentage Minority Students in Open Enrollment Flows,
Southwest Twin Cities School Districts, 2009-2010**



Data Source: Minnesota Department of Education; MN-Link.

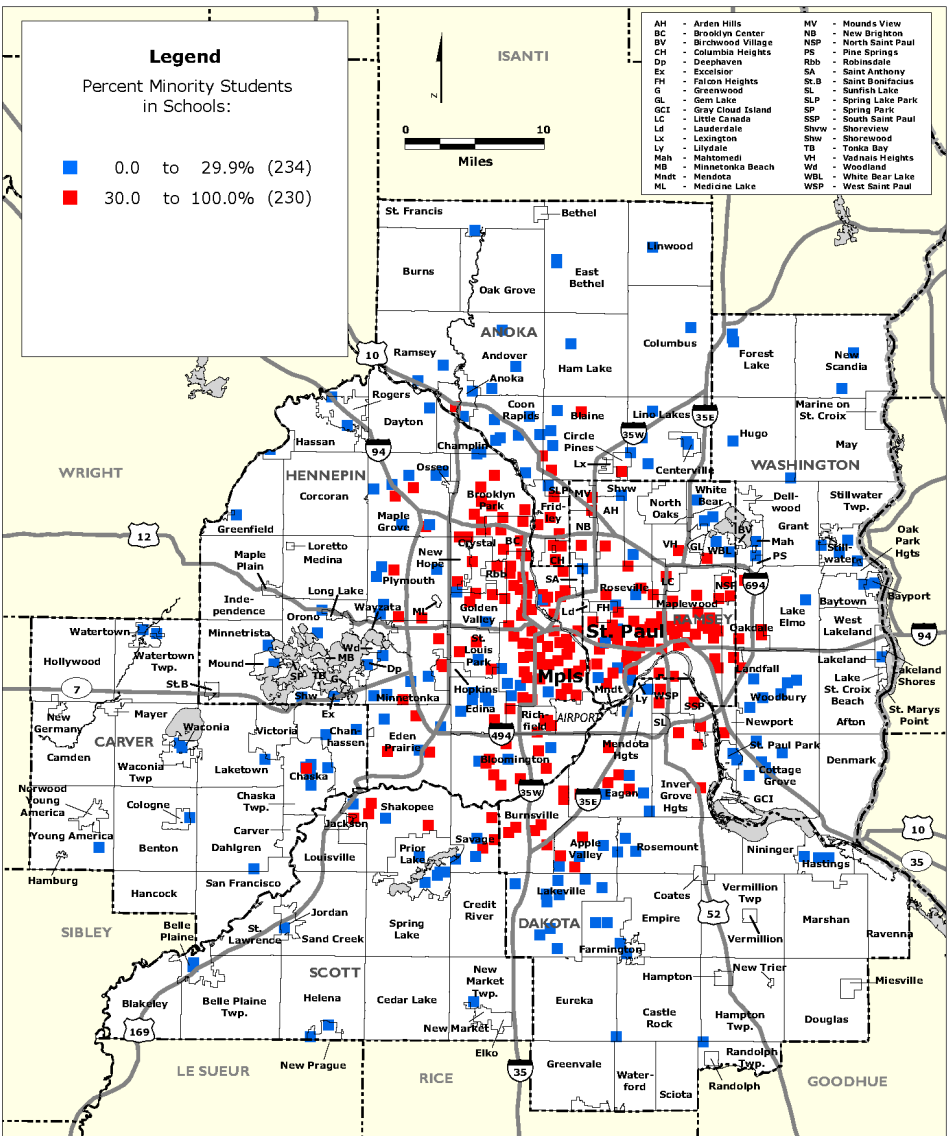




Minorities in Schools and Neighborhoods & Location of Transit Types



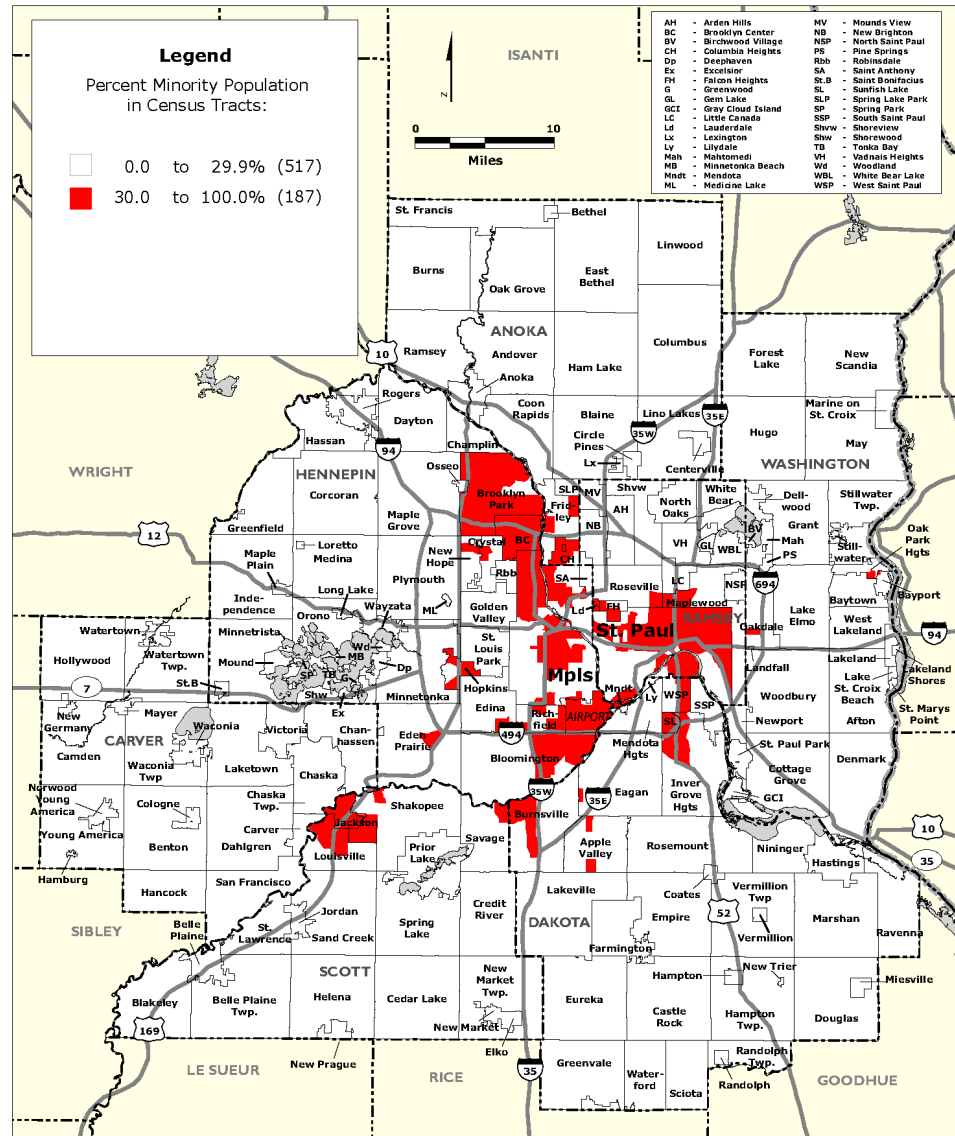
MINNEAPOLIS - SAINT PAUL REGION Minority Percentage of Public Elementary Schools in 2013



Data Source: Minnesota Department of Education.



MINNEAPOLIS - SAINT PAUL REGION Percentage Minority Population by Census Tract, 2010

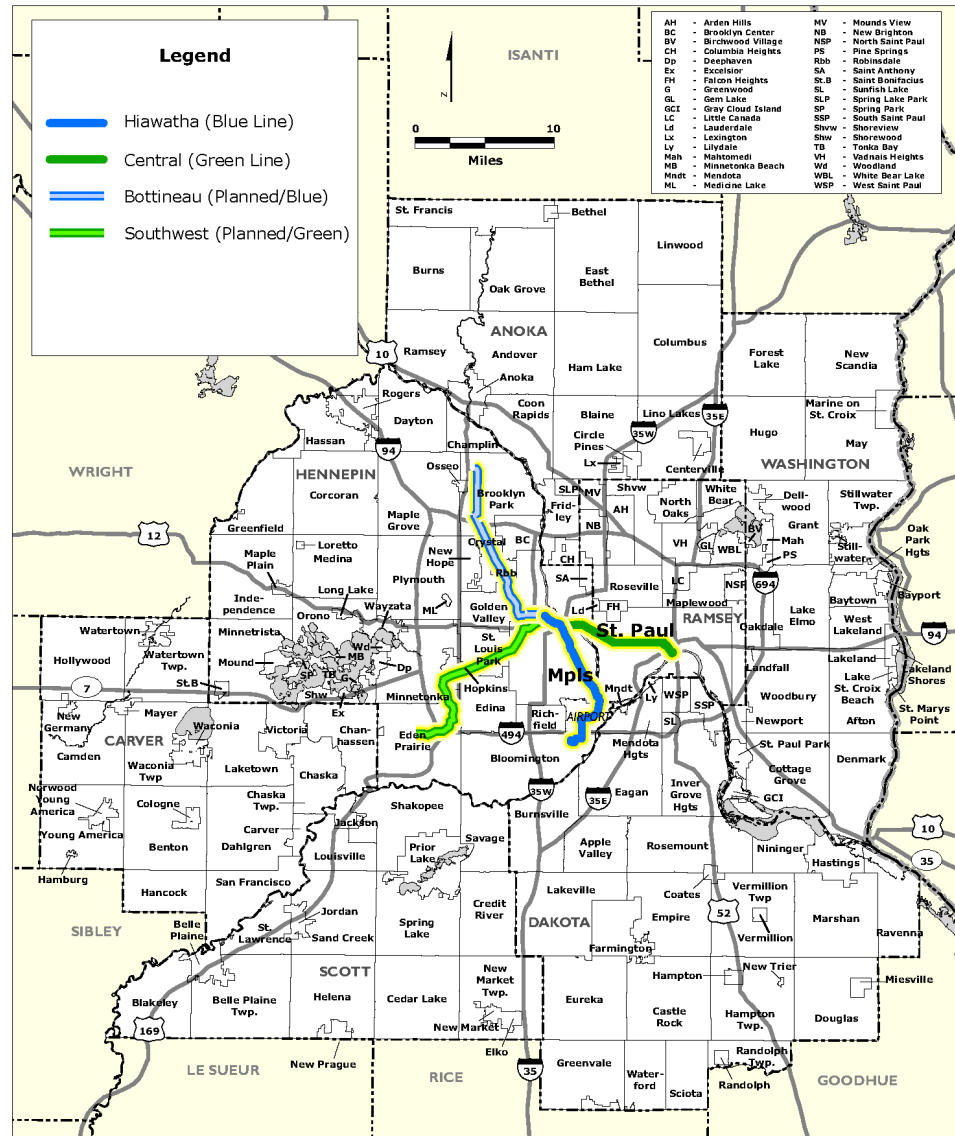


Data Source: U.S. Census Bureau SF1.



MINNEAPOLIS - SAINT PAUL REGION

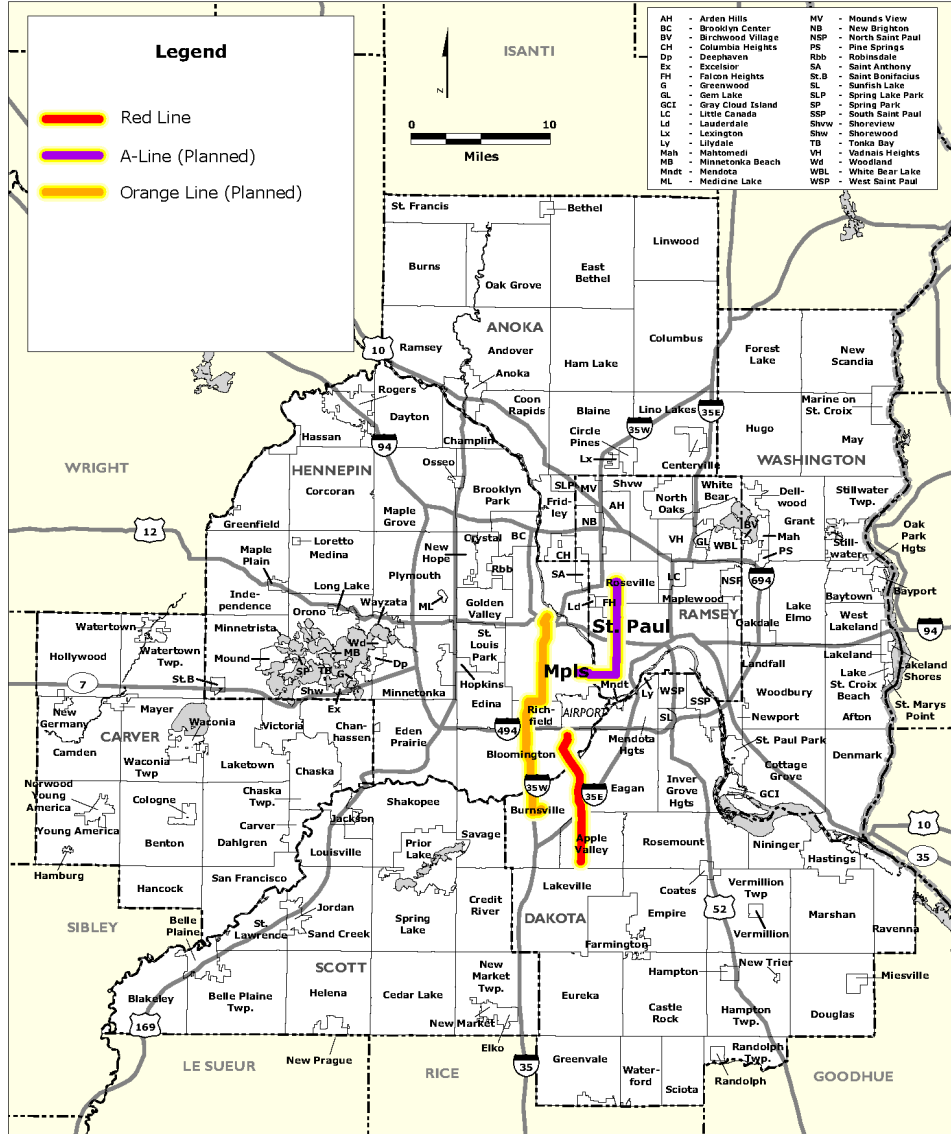
Current and Planned Light Rail Transit Lines



Data Source: Minnesota Department of Education.



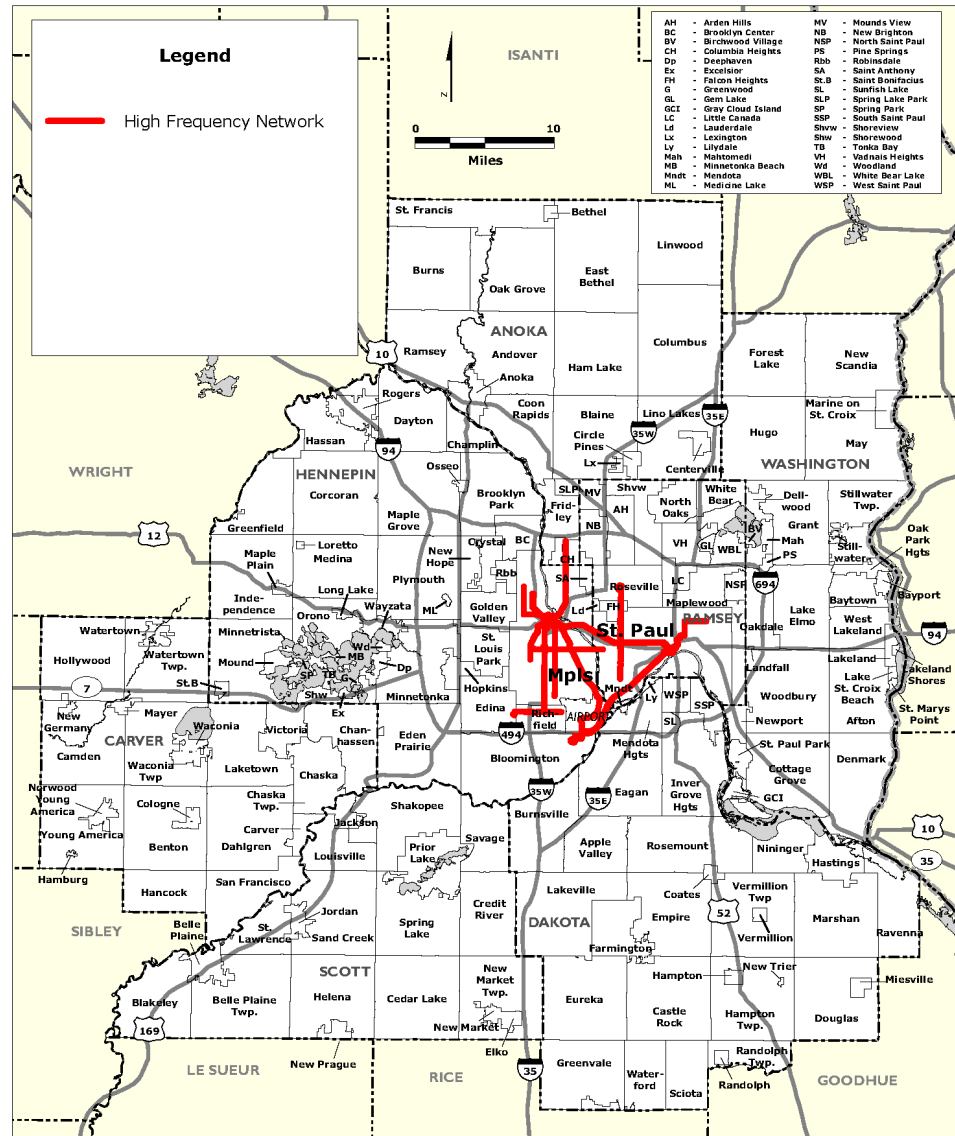
MINNEAPOLIS - SAINT PAUL REGION Current and Planned Bus Rapid Transit Lines



Data Source: Minnesota Department of Education.

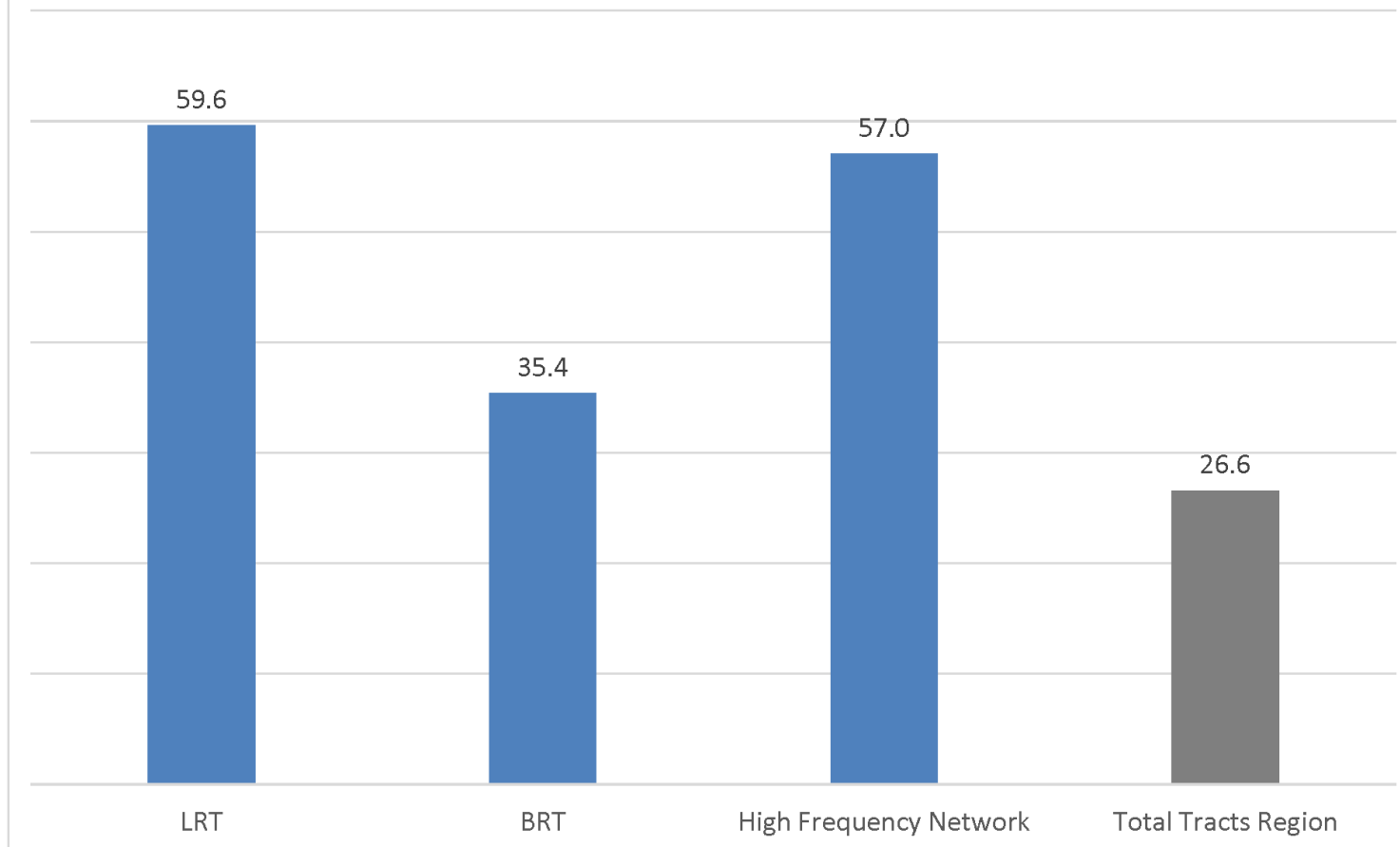


MINNEAPOLIS - SAINT PAUL REGION High Frequency Network in 2014

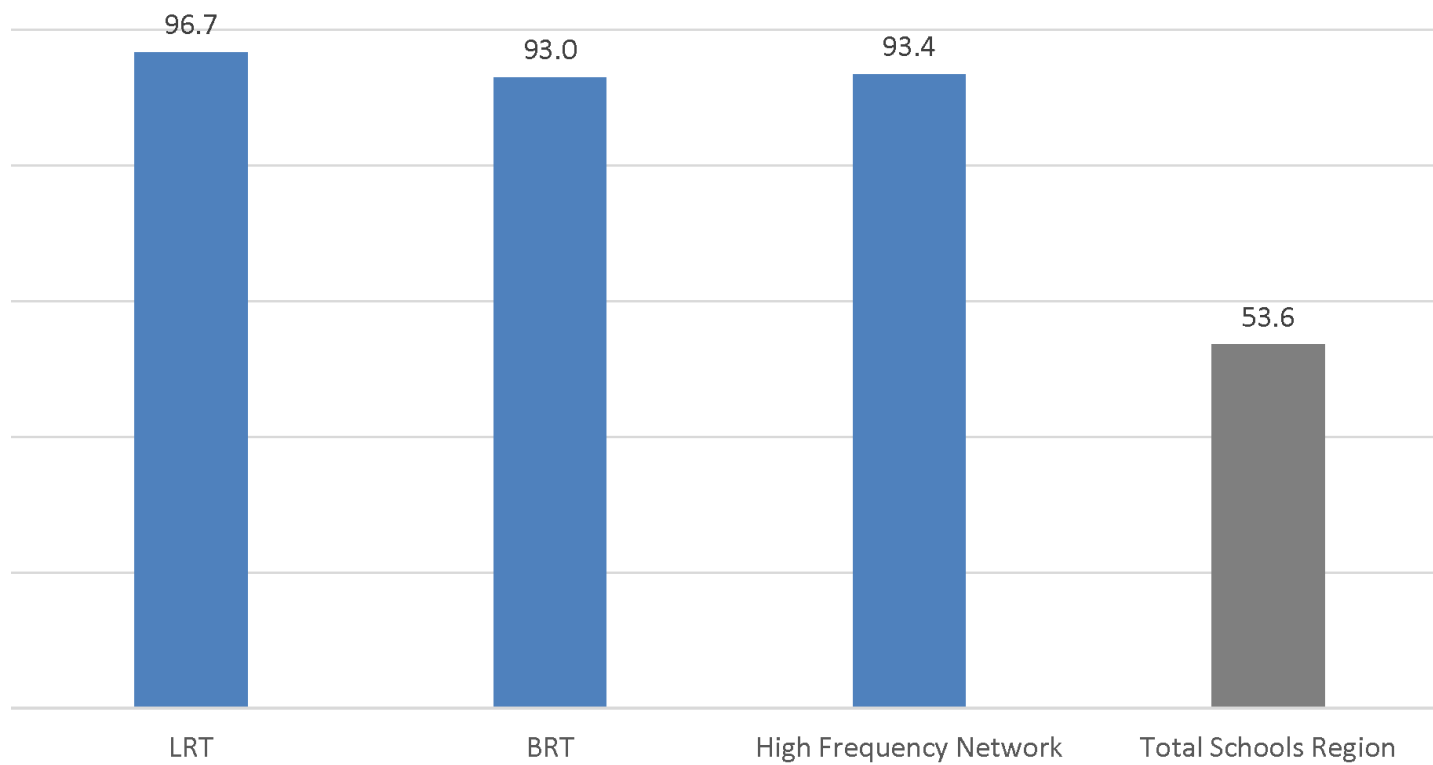


Data Source: Minnesota Department of Education.

Percentage of Census Tracts With $\geq 30\%$ Minority at Station Stops, 2010



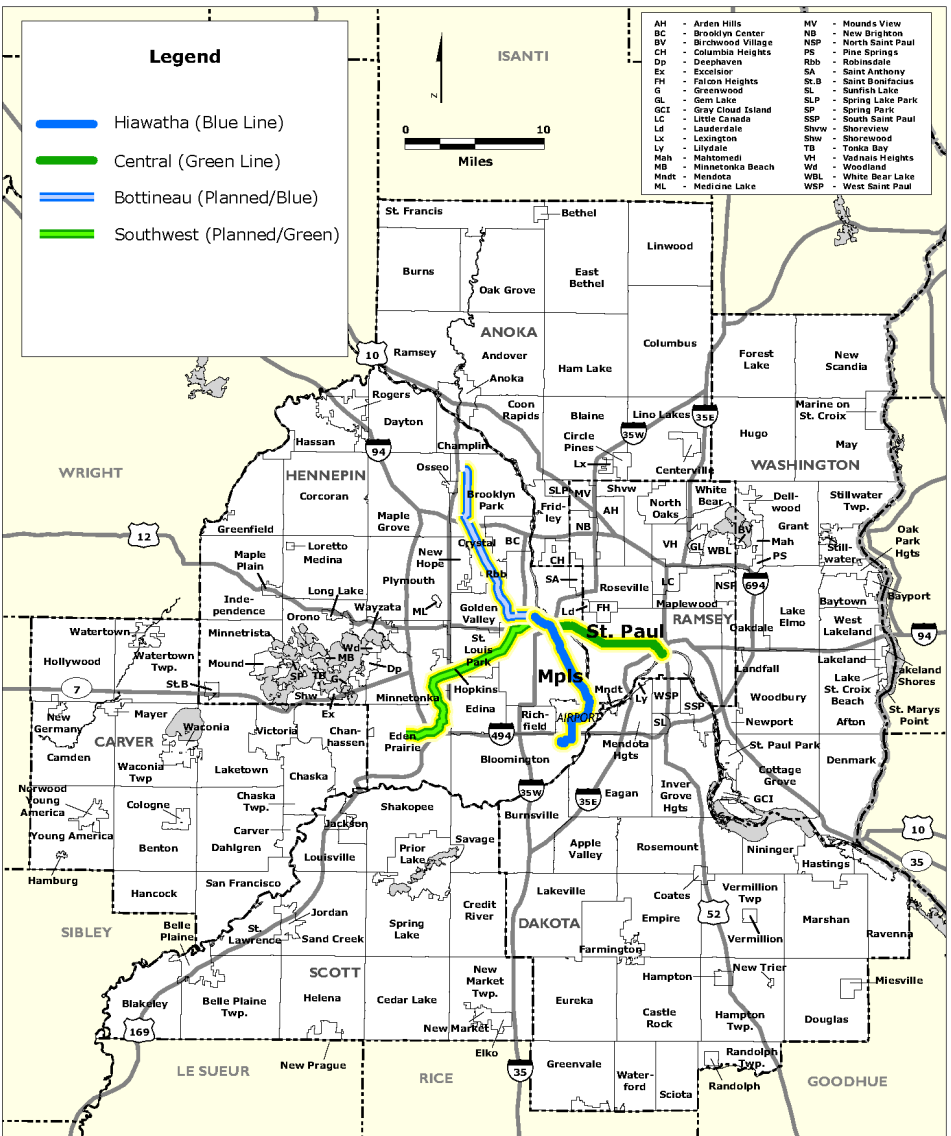
Percentage of Elementary School Areas With >= 30% Minority at Station Stops, 2013





Transit Line Breakout

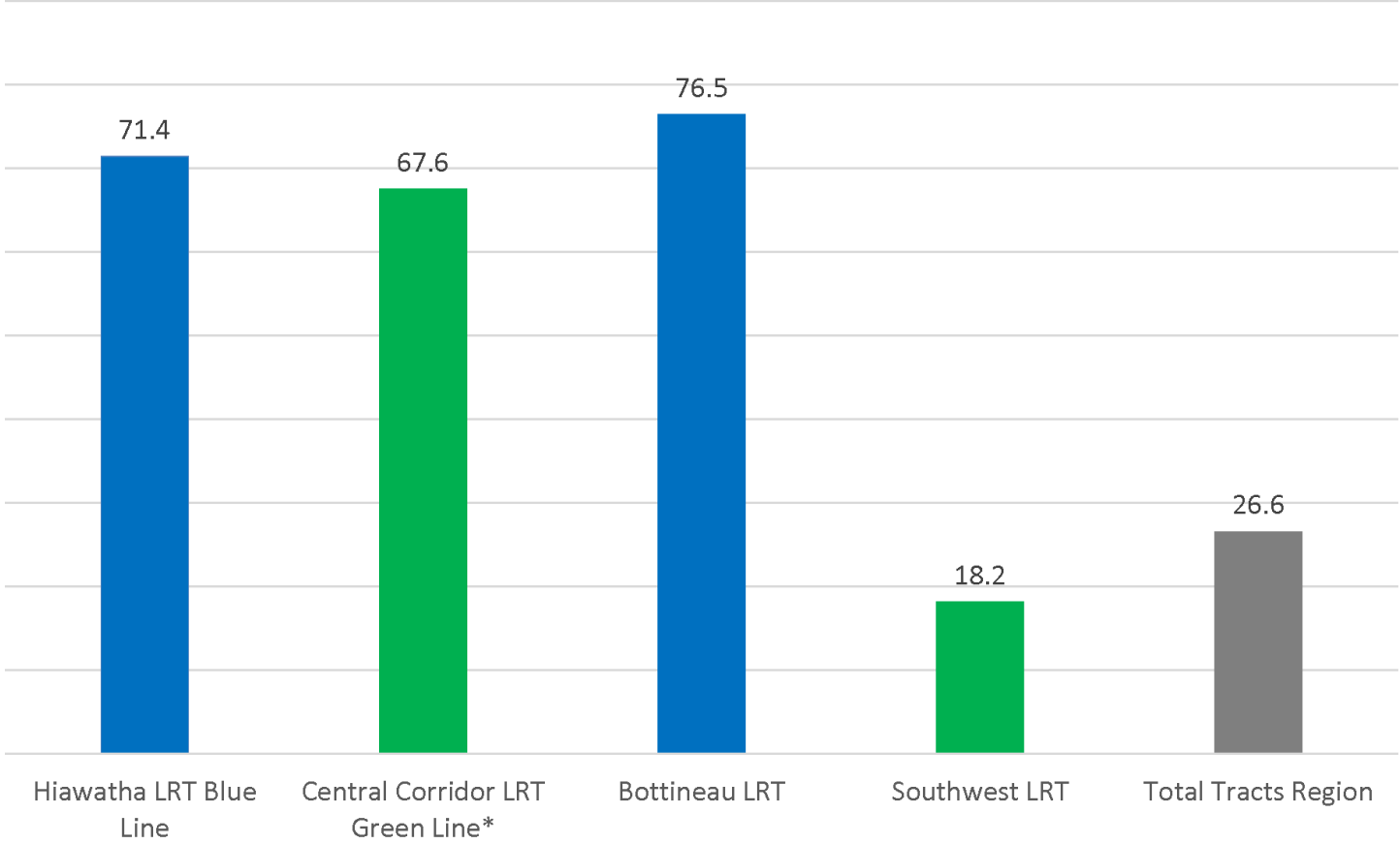
MINNEAPOLIS - SAINT PAUL REGION Current and Planned Light Rail Transit Lines



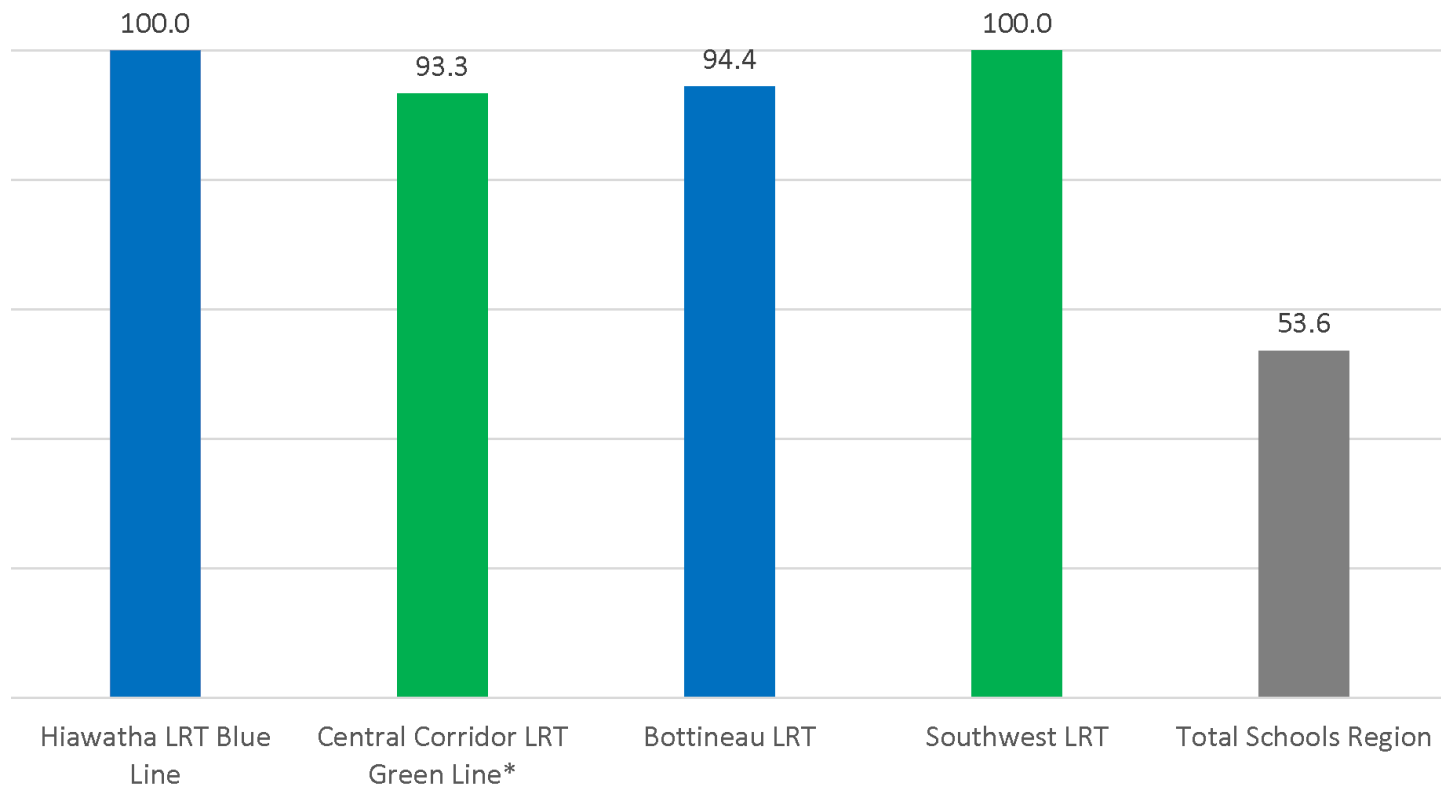
Data Source: Minnesota Department of Education.



Percentage of Census Tracts With $\geq 30\%$ Minority at LRT Station Stops, 2010

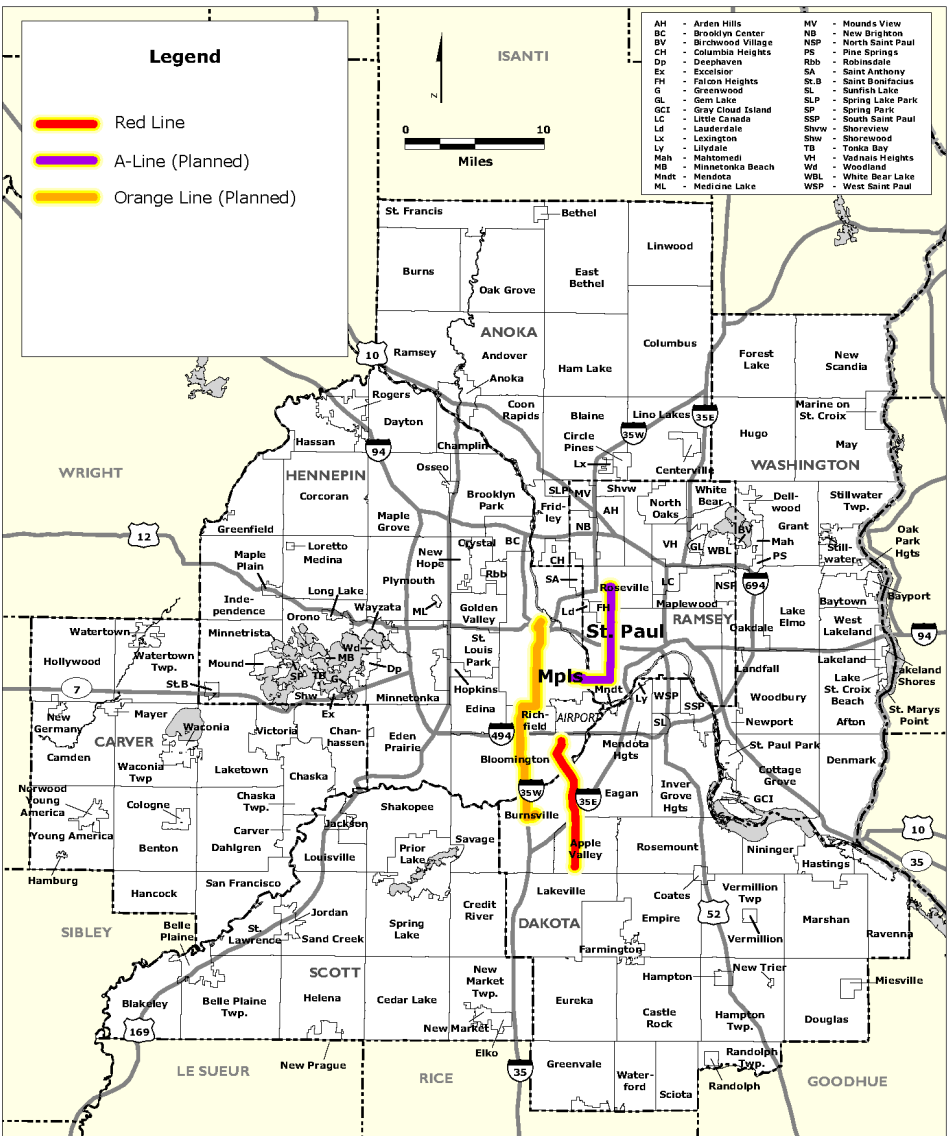


Percentage of Elementary School Areas With >= 30% Minority at LRT Station Stops, 2013



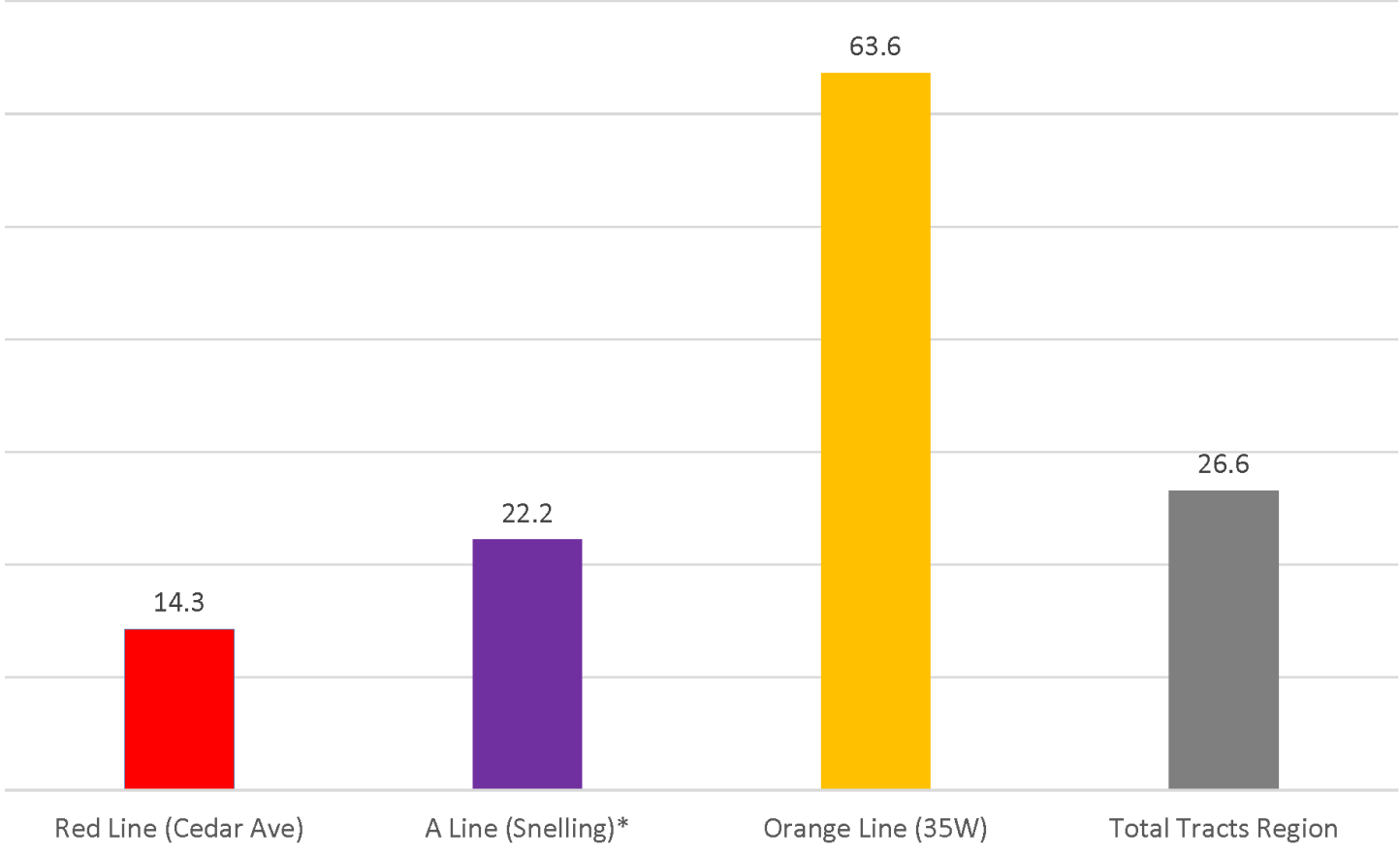


MINNEAPOLIS - SAINT PAUL REGION Current and Planned Bus Rapid Transit Lines

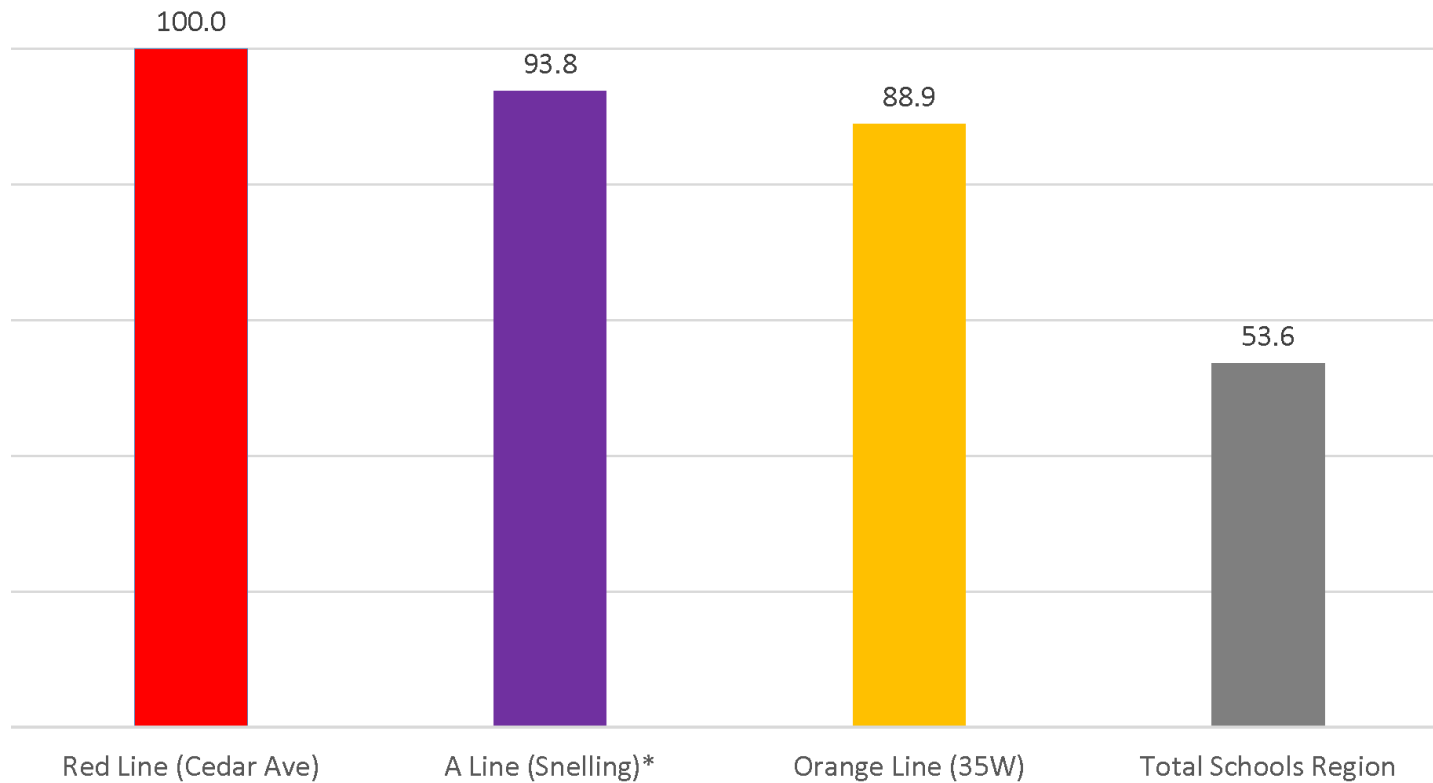


Data Source: Minnesota Department of Education.

Percentage of Census Tracts With $\geq 30\%$ Minority at BRT Station Stops, 2010



Percentage of Elementary School Areas With >= 30% Minority at BRT Station Stops, 2013





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