JOHNSON COUNTY

COMMUNITY HOUSING STUDY

ACKNOWLEDGMENTS

The project team would like to acknowledge the contributions of the residents, chambers, and partner organizations of Johnson County, who gave their time, ideas, and expertise to create this study. With their assistance and direction the plan gained the depth necessary to truly represent the county and it is with their commitment that the plan will be implemented.

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EXECUTIVE SUMMARY

The study provides an in-depth analysis of the current and future needs for affordable, workforce, and other housing options to bridge gaps in housing demand and supply. Each strategy in the study is tied to a wealth of information that forms a picture of Johnson County's housing market today. The information includes qualitative and quantitative sources to analyze factors for each city in Johnson County. The next few pages provide a summary of what is in the study and its use.

INTRODUCTION

To move the housing study outcomes into action, a multi-jurisdictional and multi-sector Johnson County Municipalities Community Housing Task Force will lead next steps from this study. The Housing Task Force's goal is to bring together a diverse set of community stakeholders to provide input and support to the County and Cities in creating attainable and sustainable housing strategies appropriate for their jurisdictions to ensure vibrant, healthy communities now and into the future.

Additionally, The coordination of all cities in Johnson County is vital for many strategies to address housing. The Housing Task Force will help lead this effort, and all cities must be willing to participate in realizing the full impact of new regional housing strategies. Of course, some initiatives will also be specific to a city's unique place in the market.

Lastly, the strategies cannot be realized by cities alone. Extensive public and private partnerships are essential to leveraging all possible resources and regional cooperation.

CHAPTER 1: COUNTY PROFILE

The County Profile builds on a review of previous reports, an assortment of data, and regional influences on the market. A thorough understanding of demographics and housing conditions at the county level provides the first steps in crafting the housing study. Summary points include:

- Johnson County will continue to see population growth.
- Almost as many multi-family units were built throughout the county in the past ten years as single-family units.
- Households making under $50,000 who rent have more difficulty finding attainable options than those that can purchase because of fewer options and rents increasing faster than incomes.
- Younger and larger households live further out from the Kansas City metro core in communities like Spring Hill, Gardner, Edgerton, and Olathe.
- Most cities in Johnson County saw household incomes rise by a lower percentage than home and rental costs in the past decade.
- Most older households want to age in their cities, but increasing assessed values make that difficult with higher tax burden, on top of the need for home renovation for universal design.
  - › The ability to stay in the community also means the option to move to a small, accessible, and attainable dwelling, which options are limited.
- More supply is needed across all price points and home types.

CHAPTER 2: HOUSING PERCEPTIONS

The study seeks to support the development of housing that is reflective of the residents that live in the county. Tho achieve this goal, the process included a variety of people representing a broad cross-section of housing providers and those looking for housing. Chapter 2 provides a summary of these conversations and the results of a community survey and listening session discussions. Summary points include:

- › Residents of Johnson County have many different preferences about housing needs. However, the affordability of housing rose to the top in much of the input gathered. Not just affordability for low income households, but for all age groups and demographics wanting to live in Johnson County.
- › People were passionate and engaged in local housing conversations. This housing study process alone garnered:
  - » 4,615 total survey responses
  - » 84 participants in 14 total small group listening sessions.
  - » More than 170 registrants for the 2020 UCS Human Service Summit focused on housing.
- › People living and working in Johnson County want to find solutions to housing challenges. From the community survey, 549 respondents said they would be interested in being part of a Johnson County Task Force on implementing housing strategies.

CHAPTER 3: DEVELOPMENT POTENTIAL

- **Each city in Johnson County faces a different set of local and county-wide factors that influence housing.** Thus, a city cannot address all solutions by itself. Some solutions will be unique to a city and its needs and other solutions will need to be a coordinated effort.
- **The strict cost of a mortgage, property taxes, insurance, or rent are not the only costs a household faces.** Transportation, childcare costs, and property maintenance are other major expenses for Johnson County residents. Therefore, a way to make housing more attainable also includes crafting responses to other key household costs.
    - › Increasing access to transportation options other than single passenger cars gives opportunities for households to spend less on mobility. For some households, these options are a necessity.
- **There is a large amount of land in Johnson County that is undeveloped along major transportation routes.** These are opportunities to increase density and bring public transportation to more areas.
- **Many areas of Johnson County are also older and have increased needs for regular property maintenance.** This is a heavy expense for some households. These are areas to conserve and ensure homeowners have the funds to upkeep the homes.

CHAPTER 4: LARGE TIER COMMUNITIES

This Chapter provides detail from Chapter 1 related to each large tier city, its growth, and future housing demand. The cohorts for large tier communities include:

- Overland Park, Olathe, Shawnee, Lenexa, Leawood, Prairie Village, Gardner. The large-tier cohort includes cities with the largest population growth potential by number of residents in the future.

OVERLAND PARK

Overland Park has an average annual construction need of 1,420 units through 2030. The average annual construction rate from 2012 to 2019 was 1,216 units, with a high of 2,094 in 2018 and a low of 705 in 2012. Recent growth has been attributed equally to a large number of rental units, a trend needing to continue.

- Approximately 4,6333 additional owner-occupied units are needed priced below $250,000 (in 2018 dollars).
- Nearly 2,706 rental units will need to be produced with rents below $1,000 per month. The lowest rent units below $600 will have to be generated through subsidy programs like low-income housing tax credits.

OLATHE

Olathe has an average annual construction need of 902 units through 2030. The net average annual construction rate from 2009 to 2019 was 591 units. A high of 870 units was in 2017 and a low of 296 in 2009. Although the net average was 749 since 2014. This construction rate appears to have just met demand with very few vacancies and options for those entering the market. Low supply can often create inflation, thus increasing production should support growth but also support a healthier, stable market.

- Approximately 2,938 additional owner-occupied units should be priced below $250,000 (in 2018 dollars).
- Nearly 1,688 rental units will need to be produced with rents under $1,000 per month, through a variety of programs.

SHAWNEE

Shawnee has an average annual construction need of 343 units through 2030. The average annual construction rate from 2012 to 2019 was 207 units, with a high of 300 in 2019 and a low of 146 in 2013. Recent growth has been driven by a better mix of single-family and multi-family units than in the past, although most multi-family units were age restricted. Age restricted units help fill housing needs for Shawnee if the residents in the units are moving from homes in Shawnee. Their former homes then become a new open unit on the market. Nonetheless, 2019 was still a big year for multi-family construction, a trend expected and needed to continue across many price points.

- Approximately 1,060 additional owner-occupied units should be priced below $250,000 (in 2018 dollars).
- About 682 rental units will need to be produced with rents below $1,000 per month, through a variety of programs.

LENEXA

Lenexa has an average annual construction need of 439 units through 2030. The average annual construction rate from 2012 to 2019 was 493 units, with a high of 690 in 2014 and a low of 142 in 2012. Unit growth between 2014-2017 was been driven by a large number of rental units in the new city center.

- About 1,443 additional owner-occupied units should be priced below $250,000 (in 2018 dollars).
- Nearly 824 rental units will need to be produced with rents below $1,000 per month, through a variety of programs.

LEAWOOD

Leawood has an average annual construction need of 86 units through 2030. The average annual construction rate from 2012 to 2019 was 70 units, with a high of 146 in 2013 and a low of 17 in 2019. Recent growth has been primarily in single-family dwellings. Some of the forecast 86 units are rebuilds on existing lots and some potential redevelopment for multi-family units.

- About 193 additional owner-occupied units should be priced below $250,000 (in 2018 dollars).
- About 89 rental units will need to be produced with rents below $1,000 per month, through a variety of programs.

PRAIRIE VILLAGE

Prairie Village has an average annual construction need of 434 units through 2030, with 224 units being net new units likely in the form of denser mixed-use redevelopment in commercial corridors. The average gross annual construction rate from 2010 to 2019 was 66 units, with a high of 312 in 2016 and a low of 3 in 2012. However, an average of 31 units were demolished per year in this time frame, most having rebuilds on the same lot. The net annual construction rate was 36 units when subtracting units demolished.

- Approximately 144 owner-occupied units should be priced below $250,000.
- About 67 rental units will need to be produced with rents below $1,000 per month, through a variety of programs.

GARDNER

Gardner has an average annual construction need of 253 units through 2030. The average annual construction rate from 2010 to 2019 was 140 units, with a high of 264 in 2019 and a low of 51 in 2012. Recent housing unit construction trends will continue with some years having more and others having fewer units than the average.

- Approximately 1,037 additional owner-occupied units should be priced below $250,000.
- Nearly 406 rental units will need to be produced with rents below $1,000 per month, through a variety of programs.

CHAPTER 5: MID-TIER COMMUNITIES

This Chapter provides detail from Chapter 1 related to each mid-tier city, its growth, and future housing demand. The cohorts for mid-tier communities include:

- **Chapter 5: Mid-Tier Communities - Merriam, Mission, Roeland Park, Spring Hill, De Soto, Edgerton.** The mid-tier communities have smaller populations and resources for housing program strategies.

MERRIAM

Merriam has an average annual construction need of 30 units through 2030. The average annual construction rate from 2009 to 2019 was 7 units, with a high of 12 in 2013 and 2019 and a low of 0 in 2009.

This may seem like an out of reach construction need. However, one major redevelopment project could satisfy the need for many years. The average annual construction does not mean these units must be split evenly year to year.

- About 126 additional owner-occupied units should be priced below $250,000 (in 2018 dollars).
- About 71 rental units will need to be produced with rents below $1,000 per month, through a variety of programs.

MISSION

Mission has an average annual construction need of 45 units through 2030. The average annual construction rate from 2010 to 2019 was 1.4 units, with a high of three in 2019.

- Mission's development model will not evolve at consistently 45 units per year. Rather, units will be added in "chunks" as redevelopment projects are completed, a couple in the first five years in particular.
- About 168 additional owner-occupied units should be priced below $250,000 (in 2018 dollars).
- Nearly 117 rental units need to be produced with rents below $1,000 per month, through a variety of programs.

ROELAND PARK

Roeland Park has an average annual construction need of around 1-2 units through 2030, equal to the average annual construction rate from 2009 to 2019. The rate hinges on some population growth coming from existing single person household turnover to larger households.

- Over the next ten years, production levels target a split of 70% owner- and 30% renter-occupied units. This is similar to past trends.
- About six additional owner-occupied units should be priced below $250,000 (in 2018 dollars).

SPRING HILL

Spring Hill has an average annual construction need of 106 units through 2030. The average annual construction rate from 2010 to 2017 was 62 units but trending upward over 100 units in recent years. A high was 152 in 2017 and a low was 24 in 2011.

Note, the average is lower than construction activity in recent years. However, some years will have many more units and some could have less. For example, a large apartment complex will significantly increase units produced in one given year.

- About 431 additional owner-occupied units should be priced below $250,000 (in 2018 dollars).
- Nearly 140 rental units will need to be produced with rents below $1,000 per month, through a variety of programs.

DE SOTO

De Soto has an average annual construction need of 69 units through 2030. The average annual construction rate from 2010 to 2019 was 32 units.

- About 221 additional owner-occupied units should be priced below $250,000 (in 2018 dollars).
- Nearly 251 rental units will need to be produced with rents below $1,000 per month, through a variety of programs.

EDGERTON

Edgerton has an average annual construction need of 21 units through 2030. The average annual construction rate from 2010 to 2019 was under one unit annually, making this an aspirational growth strategy for Edgerton.

- About 118 additional owner-occupied units should be priced below $250,000 (in 2018 dollars).
- Nearly 27 rental units will need to be produced with rents below $1,000 per month, through a variety of programs.

CHAPTER 6: SMALL TIER COMMUNITIES

This Chapter provides detail from Chapter 1 related to each small tier city, its growth, and future housing demand. The cohorts for small tier communities include:

- Chapter 6: Small-Tier Communities - Fairway, Lake Quivira, Mission Hills, Mission Woods, Westwood, Westwood Hills. Small-tier communities are generally land-locked and represent the smallest by population in Johnson County.

FAIRWAY

Aside from common themes in Chapter 2 that pertain to the entire county, several issues and opportunities are apparent to Fairway.

- Fairway is one of the cities with prevalent demolition and rebuild activity, with these residents coming from outside the city or residents wanting to up-size.
- Opportunity to update codes to allow multi-generational housing without demolishing homes. Such as accessory dwelling units.
- Trends in the last ten years include housing turnover from the oldest age cohorts to younger families moving in with children. Currently, retirees with needs look elsewhere.

LAKE QUIVIRA

Lake Quivira is a unique community that is not meant to serve various housing types and preferences. The community does provide one desired housing product for the Johnson County market, larger homes with four or more bedrooms.

MISSION HILLS

Recent demolition and rebuilds are occurring in Mission Hills and there is a desire to maintain the scale of neighborhoods. Rebuilds also cause issues with stormwater runoff that affects neighbors. New design standards in 2020 are an opportunity to start to address these issues.

MISSION WOODS

Mission Woods is a unique community that is not meant to serve various housing types and preferences. The community does provide one desired housing product for the Johnson County market, larger homes with four or more bedrooms.

WESTWOOD

Westwood has issues with rebuilds like other nearby cities. Lots are smaller and rebuilds are taking up the entire lots. This is affecting the elderly population who do not know what their lot is worth in the market and may sell at prices lower than its worth.

Seniors that cannot age in place tend to move to southwest Johnson County or other counties. Single level homes or universal design rehabilitations are an opportunity to offer a needed product in Westwood.

There are some larger redevelopment prospects in the city but residents do tend to push back on change.

WESTWOOD HILLS

The small community is a transition of neighborhoods into high end areas of the county. Developers are coming in and bidding out first-time homebuyers.

Westwood Hills is a unique National Historic District community that is not meant to serve various housing types and preferences. The historic character should be maintained.

CHAPTER 7: STRATEGIC DIRECTIONS

This chapter provides a summary of opportunities and challenges facing Johnson County cities. The summary comes from housing, demographic, and economic data for the County and conversations detailed in Chapter 2. In summary, the opportunities and challenges identified include:

HOUSING OPPORTUNITY THEMES

- Opportunities for infill development
- Demand for housing variety
- Desire to age within communities
- High-quality housing stock
- Continues demand for rentals at all price points
- Highly respected communities and schools
- Large job center with the need for adjacent housing
- Land and transportation opportunities that support innovative housing products

HOUSING CHALLENGE THEMES

- Attainable options for residents to age within their communities
- Limited housing variety - lack of "Missing Middle" housing
- Slower return to building
- Limited advocacy for housing variety
- Limited supply of first-time homebuyer options
- Lack of consistency in regulations and the basic ground rules
- Unseen homelessness

CHAPTER 8: HOUSING STRATEGIES

The following is a summary of the goals in chapter 8 and a table of their applicability.

GOAL 1. ESTABLISH/CREATE/DEVELOP A NETWORK OF HOUSING ADVOCATES

Tools:

1. Develop and Manage a Housing Fact Book
   - Housing communication
     - Local advocacy
     - Terminology - Relate housing to people

GOAL 2. CREATE MECHANISMS TO SHARE RISK

Tools:

1. Public/Private Partnerships
   - Existing partnerships
   - Trust funds
   - Lending consortium
   - Housing Development Fund
   - Community Housing Bond
2. Non-Profit
   - Develop or identify a non-profit developer
3. Reducing Site Costs
   - Shared cost
   - Special assessments
   - Subordinate payments
   - Infrastructure standards

GOAL 3. PRESERVE AND REHABILITATE EXISTING ATTAINABLE HOUSING

Tools:

1. Expanding Program Options
   - Purchase Rehab Resale program for owner and rental units
2. Continue Existing Programs
3. Market Existing Programs
   - Rental rehabilitation programs
   - First-time homebuyer rehab programs
   - Non-city/county programs
   - Promote design guides for code requirements and energy efficiency programs

GOAL 4. INCREASE THE VARIETY OF PRODUCT TYPES, ESPECIALLY IN MIDDLE-DENSITY

Tools:

1. Rethink Neighborhood Design
2. Infill Development
3. Allow More Housing Products By-right in Residential Zoning Districts
4. Proactively Target Missing Middle-Density Housing Products

GOAL 5. REMOVE CODE UNCERTAINTIES IN THE DEVELOPMENT PROCESS

Tools:

1. Streamline Approval Procedures
2. Prepackaged RFPs and Site Plans
3. Small Lot, Townhome, Middle-Density Product Demonstration

GOAL 6. PRIORITIZE FUNDING/INCENTIVES FOR ATTAINABLE HOUSING ADJACENT TO JOBS AND TRANSPORTATION

Tools:

1. Leverage All Risk-Sharing Tools in This Chapter with Housing Goals to maintain the attainability of the existing stock and new housing opportunities.

GOAL 7. CONNECT EXISTING HOUSING RESOURCES (INCLUDING HELP FOR OTHER EXPENSES) AND FILL GAPS LEFT BY THE PRIVATE MARKET

Tools:

1. A One-Stop Database for Housing Programs
2. Leverage Housing Partnerships

FIGURE 8.3: HOUSING GOALS APPLICABILITY

GOAL	POLICY TARGET HOUSING PRODUCT	TARGET HOUSING PRICE POINT	CITY OR LOCATION CONTEXT
1. ESTABLISH/CREATE/DEVELOP A NETWORK OF HOUSING ADVOCATES	All products, especially middle and higher density rental options	Various price points, moderate market rate preferred as targets because of their increased risk for builders.	Most applicable to fastest growing cities and areas of major redevelopment
2. CREATE MECHANISMS TO SHARE RISK	All products that meet the needs in this assessment	All price points acceptable. More policy incentives for homes under $250,000 and rents under $1,000. Deferred loans and developer paybacks more appropriate for higher price points that meet a product gap.	All cities and all locations outside of environmentally sensitive areas. Incentive policies reserved for areas contiguous to existing development and/or mixing of housing types
3. PRESERVE AND REHABILITATE EXISTING ATTAINABLE HOUSING	All products, especially single-family homes built before 2000	Focus on homes priced under $250,000.	All cities based on recommendations in Section 2
4. INCREASE THE VARIETY OF PRODUCT TYPES, ESPECIALLY IN MIDDLE-DENSITY RANGES	Townhomes, patio homes, multi-plexes, co-housing, Accessory Dwelling Units	All price points, focus toward moderate to market rate rents and home price points.	For landlocked cities - opportunities in redevelopment site. Other cities incorporated into new subdivisions and infill development.
5. REMOVE CODE UNCERTAINTIES IN THE DEVELOPMENT PROCESS	All products	Various price points.	Applicable to all cities
6. PRIORITIZE FUNDING/INCENTIVES FOR ATTAINABLE HOUSING ADJACENT TO JOBS AND TRANSPORTATION	Focus on rental options	All price ranges, but target mixed-income developments with a portion of rents under $1,000.	Cities on the Interstate or section arterial street systems; Logistics Park Kansas City Intermodal Facility
7. CONNECT EXISTING HOUSING RESOURCES AND FILL GAPS LEFT BY THE PRIVATE MARKET	N/A	Below market rate housing prices and rent; Below median household income levels.	All cities and all locations

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JOHNSON COUNTY HOUSING INTRODUCTION

WHY A STUDY FOR JOHNSON COUNTY?

The cities of Johnson County know that continuing to grow the economy requires housing for everyone accessible to jobs, schools, and recreation. As housing prices continue to rise, a primary reason for a study is to overcome challenges to having attainable housing options in Johnson County at various price points and housing types. Johnson County and 19 municipalities within the county invested in the study and were engaged throughout the process. Funding support for the study was also provided through a grant from Evergy.

Additionally, housing is a priority health equity issue identified by the Johnson County Health Equity Network (HEN), a multi-sector collaborative convened by United Community Services of Johnson County. Grant support from the Kansas Health Foundation and REACH Healthcare Foundation funds the work of the HEN.

To move the housing study outcomes into action, a multi-jurisdictional and multi-sector Johnson County Municipalities Community Housing Task Force will lead the next steps from this study. The Housing Task Force's goal is to bring together a diverse set of community stakeholders to provide input and support to the County and Cities in creating attainable and sustainable housing strategies appropriate for their jurisdictions to ensure vibrant, healthy communities now and into the future. The Health Forward Foundation and Evergy funded the Housing Task Force efforts.

REGIONAL APPROACH

A housing market is a complex and ever-changing landscape of countless variables, including economic factors guiding production, rehabilitation, and demand. Social factors also influence housing preferences, as does homebuyers' willingness to adapt to new products and the community's perception. Understandably, housing challenges and market forces go beyond jurisdictional boundaries.

Therefore, the coordination of all cities in Johnson County is vital for many strategies to address housing. The Housing Task Force will help lead this effort, and all cities must be willing to participate in realizing the full influence of new regional housing strategies. Of course, some initiatives will also be specific to a city's unique place in the market.

ORGANIZATION

The document is organized to allow individual cities to easily access local analysis with implementation tools that can be leveraged at the local or regional level. The study is organized as follows:

- **SECTION ONE: Johnson County Profile.** A look at overall conditions and perceptions across the county, including opportunity areas.
- **SECTION TWO: Community Profiles.** A closer look at each community in Johnson County, including forecasts for future housing demand and opportunities.
- **SECTION THREE: A Path Forward.** A strategy and implementation toolbox that each community or the county as a whole can utilize with the help of a Housing Task Force.

TECHNICAL COMMITTEE

The planning team worked closely with a technical committee to present findings and gain a deeper understanding of conditions in the county. Members include:

- Mike Brungardt – City Administrator, De Soto; Represents the western portion of the county.
- Chris Engel – City Administrator, Merriam; Represents the northeastern portion of the county and serves on the Health Equity Network leadership team.
- Jay Leipzig - Director of Planning, Johnson County; Represents the County.
- Jack Messer – Director of Planning and Development, Overland Park; Represents the largest city in the county.
- Aimee Nassif – Chief Planning & Development Officer, Olathe; Represents the second largest city in the county.
- Mayor Don Roberts – Edgerton; Represents the far southwest portion of the county and smaller city. Also, a United Community Services Board member.
- Mayor Paula Schwach – Westwood Hills; Represents the far northeast portion of the county and a small city.
- Laura Smith – City Administrator, Mission; Represents a mid-size city and northeastern portion of the county. Also is part of MARC's First Ring Suburb Coalition.
- Nolan Sunderman – City Manager, Shawnee; Represents the western and northern portion of the County.
- Maury Thompson – Deputy County Manager, Johnson County; Represents the County.
- Julie Brewer - United Community Services, primary project management and city relations.
- Kristy Baughman - United Community Services, primary project management and city relations.

ROLE OF THE STUDY

A housing study is designed to explore, evaluate, and identify strategies to address housing issues throughout a given area. The housing market impacts the quality of life for residents of the region, people interested in moving to the area, and businesses seeking to recruit (and retain) employees.

To understand the state of housing supply and demand in Johnson County, this study combines an extensive public input process and analysis of the demographic and market trends. This study's recommendations will be initiated by the Housing Task Force comprised of representatives from throughout the county. It is important to note that there is no one perfect solution to address issues and capitalize on strengths. Therefore, the strategies included in Section 3 are a menu of options that will need to be combined and altered to meet the unique aspects of different communities.

CITY ROLE

Read and understand the study. Listen to the recommendations and efforts of the Housing Task Force. Work closely with staff, Task Force stakeholders, and regionally with other cities to determine policy, programs, and funding to support the identified housing needs. Follow through on the Task Force's work and adopt policies that meet the goals and intentions in this study, considering the unique context of their city and alignment with city goals.

COUNTY ROLE

Similar to the city role, listen to the recommendations and efforts of the Housing Task Force. Adopt policy, programs, and funding to support the identified housing needs. Work closely with cities to align efforts where possible to meet the goals and intentions in the study. Some actions may require a coordinated front to lobby for State-level changes in housing policy and broad coordination across Johnson County jurisdictions.

HOUSING TASK FORCE ROLE

Refine and detail the steps for implementing the strategies in this study. The Task Force will empower local stakeholder action on the strategies that fit local contexts and have a sustaining plan for continuing efforts into the future. Lastly, they will advocate for residents and sectors of the housing market needed in cities.

UNITED COMMUNITY SERVICES ROLE

Provide support and continued data, resources, and connections to cities, the county, Task Force, and other associated organizations to advance this study's housing goals.

CITIZEN ROLE

Seek to understand the housing needs and challenges of all different people and circumstances in your community. Advocate for housing that meets these needs. Get involved with the community efforts.

ENGAGEMENT

The Johnson County Housing Study included a comprehensive public engagement process to help understand the vision and needs of the county.

To broaden the public input, a series of listening sessions and public meetings were held in the summer and fall of 2020. The COVID-19 pandemic changed the ability to meet in person. However, participation and input remained robust from many different demographic groups across the county. Additionally, a community survey of the general public received more than 4,615 responses, 14 listening session discussions with 84 participants, and input from the 2020 UCS Human Service Summit with over 170 registrants. The survey was advertised by local organization, e-mail, social media, libraries, and other outlets, similar to other planning efforts.

Quotes from community survey respondents are spread throughout the document to express sentiments heard throughout the engagement process.

SOCIAL AND RACIAL EQUITY

United Community Services of Johnson County and other organizations have focused on the need for attainable housing options for all Johnson County residents. This study was not charged to specifically analyze racial equity in housing practices and perceptions.

However, there is a history of disproportionate impacts of housing challenges on communities of color in cities across the country. There were several racially restrictive legal tools that developers, real estate agents, and government agencies used to ensure suburban neighborhoods remained all-white. From deed restrictions to home associations to FHA-subsidized communities, Johnson County, like many of the United States' new suburban developments, witnessed each of these tools in action. Structural racism played a significant role in Johnson County's early development. An exhibit at the Johnson County Museum tells the story of the birth of Johnson County and its impact on racial diversity in housing to provide context for the data contained in this study: Https://youtu.be/khgp3JOHbwM

DATA

A variety of sources were used to develop the demographic and economic analysis. These included:

- The U.S. Decennial Census and American Community Survey (2018 5-year Estimates);
- Multiple Listings Service (MLS) data provided by local realtors;
- Bureau of Labor Statistics
- Local city building permit data, provided by local city staff;
- County GIS Department;
- United States Geological Survey (USGS) and National Resources Conservation Service (NRCS) mapping data;
- Mid America Regional Council (MARC) https://www.marc.org/Data-Economy
- Past plans, studies, and city ordinances provided by county staff.

A Note on Pandemic Influences...

The housing study was done during uncertain circumstances in 2020. The study notes the potential short-term effects of a recession where applicable, an economic situation that was still fluid at the time of this document. Indicators towards the end of 2020 had yet to indicate severe impacts on the housing market. However, rising housing construction costs partially attributed to the pandemic were prevalent. The next chapter provides detailed market data and potential recession-related implications.

HOUSING TERMINOLOGY USED IN THIS STUDY

There are many terms used to discuss housing needs and describe actions. Below is common terminology used throughout the study to describe certain situations, conditions, or intended actions.

Appraisal. Assesses the current market value of a property and is usually a key requirement when a property is bought, sold, insured, or mortgaged. Comps (comparables) are needed; these are properties located in the same area, have similar characteristics, and have an established value (recent sales).

Assisted Housing. In the context of this study, assisted housing is defined and refers to housing that caters to households that want or need additional services. This could include provided meals, cleaning service, shared maintenance, and other similar accommodations. This definition includes "assisted living units." Often those in assisted housing are older adults that live independently well after retirement.

Attainable Housing. Any housing that is not financially burdensome to a household in a specific income range. Financially burdensome could be housing expenses that exceed 30% of household income. However, it could also include situations where a household has high day care costs, student debt, or other expenses that limit income to spend on housing. Housing in terms of housing subsidized by Federal programs can be included in this definition.

Contract Rent. For renter-occupied units, the contract rent is the monthly rent agreed upon regardless of any furnishings, utilities, or services that may be included. Data for contract rent excludes units for which no cash rent is paid. (Census.gov)

Empty-Nester. A single or couple without children living at home. Empty-nesters can include any age range but most often refers to older adults whose children have moved out and no longer live at home.

Filter Effect. Occurs when higher income households are "filtered" out of housing units that are well below the price points that they can afford. Often it involves "move-up" housing that frees up existing, more affordable housing. Today the moves can be lateral in square footage but also upgrades in locations or amenities with smaller home square footages.

Gap Financing. Refers to a short-term loan for the purpose of meeting an immediate financial obligation until sufficient funds to finance the longer-term financial need can be secured.

Gross Rent. Gross rent is the contract rent plus the estimated average monthly cost of utilities (electricity, gas, and water and sewer) and fuels (oil, coal, kerosene, wood, etc) if these are paid by the renter (or paid for the renter by someone else). (Census.gov)

Leverage. It can describe engaged partner organizations (financial, organizational, and human capital) to enable a more significant outcome, provide funding, or gain access to additional funds such as grants by pledging local resources.

HOUSING TERMINOLOGY USED IN THIS STUDY (CONT'D)

Market Rate. The price that the broad number of homebuyers or renters are willing to pay for housing. Market rate housing does not have any restrictions on price. Generally, when the demand goes up, the market rate price will also go up. Conversely, when supply goes down, the market rate price tends to go up. Note, the market rate price may also be a price buyers must pay because there are no other options for their situation, putting them housing cost burdened.

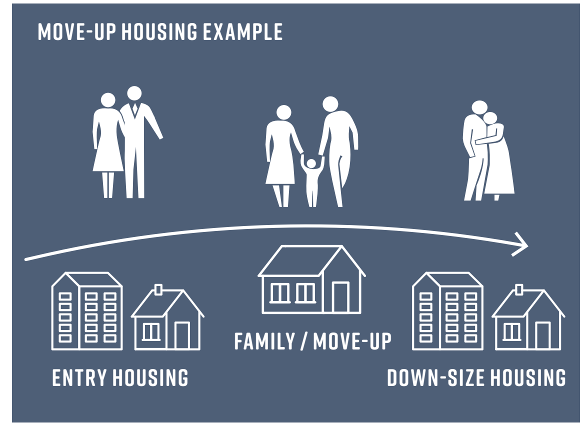
Median Household Income. This includes the income of the householder and all other individuals 15 years old and over in the household, whether they are related to the householder or not. The median divides the income distribution into two equal parts: one-half of the cases falling below the median income and one-half above the median. For households and families, the median income is based on the distribution of the total number of households and families, including those with no income. (Census.gov)

Mixed-Use. Mixed-use districts are areas with two or more different uses such as residential, office, retail, and civic in a compact urban form. Typical residential uses in a mixed-use district range from medium density to very high density uses.

Move-up Housing. The natural cycle of how people move in the housing market, referring to the process of moving from renting to mid-sized owner-occupancy to larger single-family homes. The "move-up" generally occurs with income increases, assuming adequate housing supply and variety is available, opening more affordable housing options for others. Recent trends indicate that "move-up" housing may not mean square footage but may mean better finishes and amenities.

Peer Counties. Comparisons to peer counties provide a baseline to evaluate whether conditions in Johnson County are significantly different from other regions. The peer counties were taken from those used in the Johnson County budget book and deemed comparable to Johnson County. While each comparison county is like Johnson County in one way or another, every community ultimately has a unique set of circumstances that set it apart from every other. Nonetheless, differences in conditions can help indicate localized issues or assets for Johnson County.

Universal Design. The process of creating products that are accessible to people with a wide range of abilities, disabilities, and other characteristics. Ideally, the concept extends to neighborhoods. Refer to the Communities for All Ages page maintained by the Mid-America Regional Council (MARC).



Community for All Ages
A great place to live and age well.

https://www.marc.org/Community/KC-Communities-for-All-Ages

SECTION ONE

JOHNSON COUNTY PROFILE

CHAPTER ONE
COUNTY PROFILE

The information in this section informs the overall housing demand that could be expected in Johnson County. While the population growth forecasts are the leading indicator of housing demand, housing characteristics inform the type of housing to meet demand and county needs. Trends in home values, income growth, occupancy, and other factors begin to form the housing demand program. However, the perceptions and insights from residents, existing and potential, are equally important. Chapter 2 continues the conversation of what residents want, need, and can afford in Johnson County.

CHAPTER I TAKEAWAYS:

- **Johnson County will continue to see population growth.**
  - The highest population growth rate through 2030 will be Gardner and Spring Hill. The highest growth in the number of people through 2030 will be Overland Park and Olathe.
  - Strong growth rates should continue in Lenexa, Shawnee, Olathe, and Overland Park.
  - Growth in De Soto and Edgerton are contingent on overcoming barriers like utilities and infrastructure, and providing local housing programs.
  - Fully built-out cities may experience slight growth through empty-nesters moving and the in-migration of families. Cities like Prairie Village, Mission, Merriam, Leawood, Roeland Park, Westwood, and Fairway would likely experience growth through redevelopment and mixed-use sites.
- **Almost as many multi-family units were built throughout the county in the past ten years as single-family units.**
  - However, the multi-family units are not spatially distributed among cities.
  - Demolition of homes is concentrated within a few cities. Cities in the northeast tend to quickly replace demolitions with another unit. Other cities, like Edgerton, are not replacing all units that are demolished because the land use changed.
  - The construction of manufactured homes is mostly non-existent and a missed opportunity for more attainable housing. Manufactured homes are becoming more popular in many larger cities. They provide a way to reduce the cost of housing through economies of scaled production.
- **Households making under $50,000 who rent have more difficulty finding attainable options than those that can purchase because of fewer options and rents increasing faster than incomes.**
  - Cities becoming more cost burdensome for renters include Shawnee, Edgerton, Fairway, Leawood, and De Soto. These cities have also had limited multi-family construction in the past ten years. Shawnee has seen some multi-family growth in recent years, but many are age restricted.
- **Younger and larger households live further out from the Kansas City metro core in communities like Spring Hill, Gardner, Edgerton, and Olathe.**
  - These areas also tend to have more home-ownership and higher growth rates.
  - Lower value to income ratios in these areas also indicate homes are relatively more attainable for families.
- **Most cities in Johnson County saw household incomes rise by a lower percentage than home and rental costs in the past decade.**
  - Exceptions are in Merriam, Mission, Mission Woods, and Westwood Hills.
    - For Mission Woods and Westwood Hills, the change is likely because of more income earning households as opposed to retirees.
    - In Merriam and Mission, rents still rose close to incomes, but home values increased by less. This could be a sign of low rental availability, home age, and condition.
  - Home values rose by the highest percentage in Prairie Village, Fairway, Lake Quivira, and Spring Hill.
  - Rent rose by the highest percentage in Fairway, Prairie Village, Roeland Park, and Shawnee.
- **Most older households want to age in their cities, but increasing assessed values make that difficult with higher tax burden, on top of the need for home renovation for universal design.**
  - **The ability to stay in the community also means the option to move to a small, accessible, and attainable dwelling, which options are limited.**
- **More supply is needed across all price points and home types.**

INTRODUCTION

This chapter summarizes the characteristics of Johnson County that strongly influence the housing market. A thorough understanding of demographics and housing conditions is the first step in crafting the housing plan. It is important to understand the historic trends, population patterns, economy, and housing market conditions today to forecast future needs and articulate a program to improve Johnson County's housing market for specific age cohorts, income levels, and personal preferences.

WHAT MARKET DATA TELLS US

Figure 1.1 summarizes the variety of elements that influence housing supply and demand. Quantitative data describes past trends in population, housing occupancy, affordability, and other objective measurements. Market data gives a quick and straightforward representation of the county and how it compares to other comparable counties and those in the region. It helps explain why conditions are the same or different compared to other areas to tailor successful policies.

WHAT MARKET DATA DOES NOT TELL US

Census and other objective data have limitations, so it provides only one element of understanding the housing market. Market data does not capture the feelings and observations of residents. It does not indicate the effect those quantitative conditions have on people in different areas. It does not fully capture the condition of housing or community amenities. Lastly, market data becomes less reliable for small areas (under 1,000) because of sampling error and insufficient data. Ultimately, the conclusions and strategic directions compare data with on the ground observations and discussions.

"The housing crisis is not going away anytime soon. It's important to our economy and building wealth in families to solve this issue."

- Survey Respondent

FIGURE 1.1: POTENTIAL FORCES ON HOUSING DEVELOPMENT AND INVESTMENT

POPULATION CHARACTERISTICS AND CHANGE

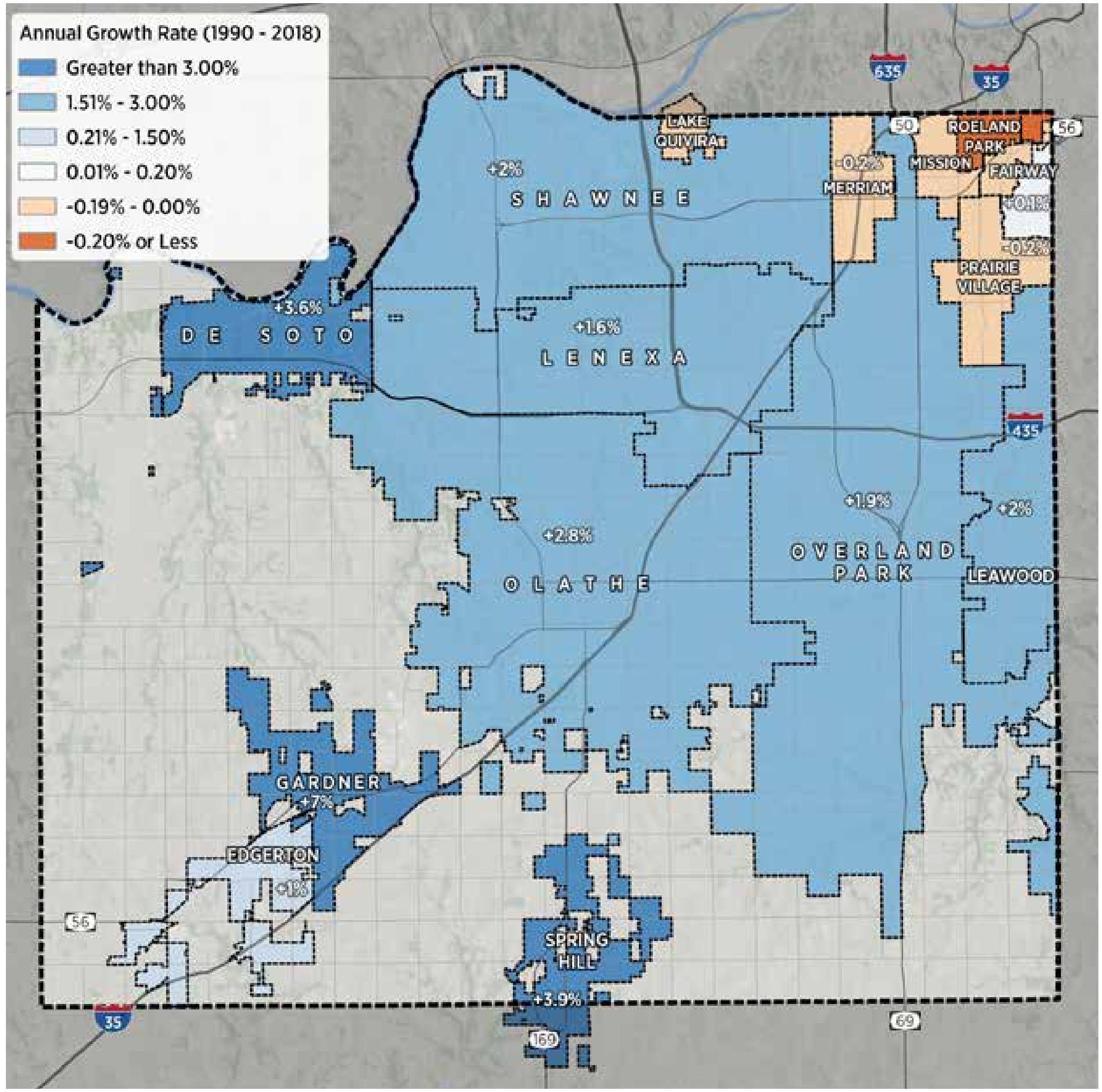
This section reviews the county's demographic trends—historical population growth, trends in age distribution, and geographic distribution. These trends provide a perspective on how the region has grown, the disparities that may have evolved, and new opportunities created.

HISTORIC TRENDS

Overall, the region experienced steady growth since 1990, starting with a population of 357,048 and growing by 64% to a 2018 estimated population of 585,502. **Map 1.1** and **Figure 1.2** (on the next page) illustrates the region's current and historic population trends. These show:

- A mix of both growth and decline across the county, with De Soto, Gardner, and Spring Hill seeing the highest percentage rates of growth between 1990 and 2018. They are also cities that mostly abut rural Johnson County.

MAP 1.1: ANNUAL GROWTH RATE BY CITY (1990-2018)



Source: U.S. Census

- The cities that experienced population decline between 1990 and 2018 resulted from fluctuations in household size rather than an out-migration of residents. These communities are mostly landlocked without areas for new development. The declines occurred in Merriam, Mission, Mission Woods, Prairie Village, Roeland Park, and Westwood. However, each only lost between 0.03% and 0.4%.
  - For example, Roeland Park lost 0.4% of its population from 1990 to 2018. However, from 2000 to 2018 alone, the average household size dropped from 2.27 to 2.20. Meaning for a population of 6,817 in 2000, the drop in household size results in a population decline to 6,615. The higher estimated population in 2018 of 6,796 is because of new housing units built or no longer vacant.
  - It is not surprising that the growing communities are those on the outskirts of the metro area with the ability to annex land, while those in decline are landlocked by adjacent communities.
- The county grew at an average annual rate of 1.8% between 1990 and 2018, exceeding growth in Kansas, which was only 0.6% during the same time frame.

FIGURE 1.2: POPULATION CHANGE - JOHNSON COUNTY COMMUNITIES

	1990	2000	2010	2018 ESTIMATE	CURRENT SHARE OF COUNTY	1990-2018 ANNUAL GROWTH RATE
DE SOTO	2,291	4,561	5,720	6,138	1.05%	3.6%
EDGERTON	1,244	1,440	1,671	1,665	0.28%	1.0%
FAIRWAY	4,173	3,952	3,882	3,947	0.67%	0.1%
GARDNER	3,191	9,396	19,123	21,351	3.65%	7%
LAKE QUIVIRA	983	932	906	982	0.17%	0.0%
LEAWOOD	19,693	27,956	31,867	34,570	5.90%	2.0%
LENEXA	34,034	40,238	48,190	55,294	9.44%	1.6%
MERRIAM	11,821	11,008	11,003	11,243	1.92%	-0.2%
MISSION	9,504	9,727	9,323	9,437	1.61%	-0.03%
MISSION HILLS	3,446	3,593	3,498	3,580	0.61%	0.1%
MISSION WOODS	182	165	178	177	0.03%	-0.1%
OLATHE	63,440	92,962	125,872	139,588	23.84%	2.8%
OVERLAND PARK	111,790	149,080	173,372	188,687	32.23%	1.9%
PRAIRIE VILLAGE	23,186	22,072	21,447	22,048	3.77%	-0.2%
ROELAND PARK	7,706	6,817	6,731	6,796	1.16%	-0.4%
SHAWNEE	37,993	47,996	62,209	65,239	11.14%	2.0%
SPRING HILLS	2,191	2,727	5,437	6,315	1.08%	3.9%
WESTWOOD	1,772	1,533	1,506	1,624	0.28%	-0.3%
WESTWOOD HILLS	383	378	359	378	0.06%	0.0%
COUNTY TOTALS	357,048	451,086	544,179	585,502	-	1.8%
STATE OF KANSAS	2,477,574	2,688,418	2,853,118	2,911,510	-	0.6%

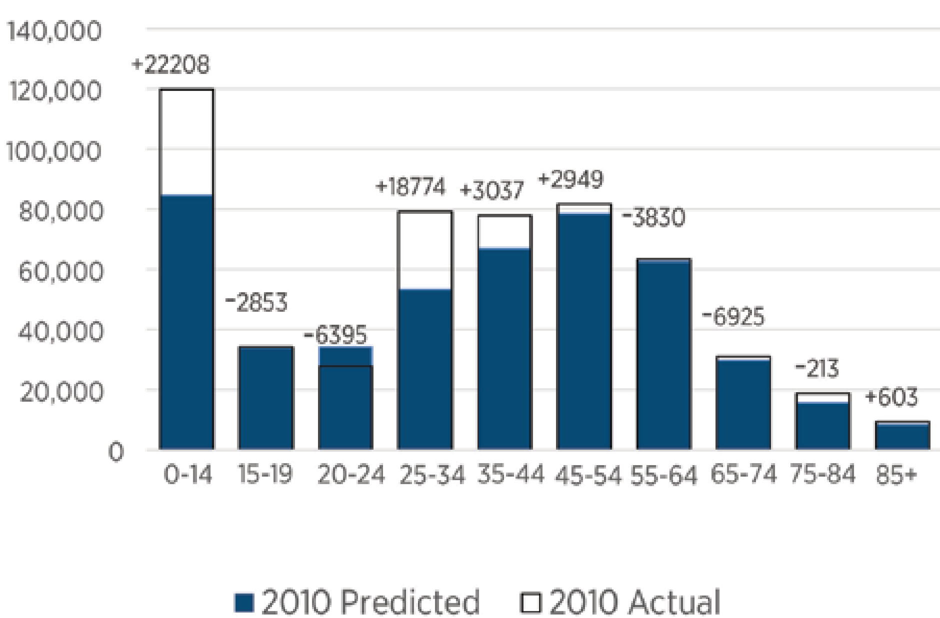
Source: U.S. Census; American Community Survey (2018 5-year Estimates)

FIGURE 1.3: REGIONAL COUNTY POPULATION CHANGE

	2000 POPULATION	2010 POPULATION	2000-2010 PERCENT CHANGE	2018 POPULATION ESTIMATE	2010-2018 PERCENT CHANGE
JOHNSON COUNTY	451,086	544,179	21%	585,502	8%
CASS, MO	82,092	99,478	21%	102,678	3%
CLAY, MO	184,006	221,939	21%	239,164	8%
JACKSON, MO	654,880	674,158	3%	692,003	3%
PLATTE, MO	73,781	89,322	21%	98,824	11%
WYANDOTTE, KS	157,882	157,505	0%	164,345	4%
DAKOTA, MN	355,904	398,552	12%	418,201	5%
WAUKESHA, WI	360,767	389,891	8%	398,879	2%
JEFFERSON, CO	527,056	534,543	1%	570,427	7%
DENTON, TX	432,976	662,614	53%	807,047	22%

Source: U.S. Census; American Community Survey (2018 5-year Estimates)

FIGURE 1.4: PREDICTED VERSUS ACTUAL POPULATION IN JOHNSON COUNTY (2010)



Source: U.S. Census; RDG Planning & Design

Figure 1.3 shows population change for Johnson County compared with surrounding metro area counties and peer counties across the nation. Johnson County's growth between 2010 and 2018 continues to be aggressive, especially for a county of its population size. Johnson County grew by more people over the past eight years compared to peer counties except for Denton County which has explosive growth since 2010.

MIGRATION PATTERNS

Figure 1.4 shows 2010 predicted population versus the actual 2010 Census counts for Johnson County. The forecast is built from average birth and death rates for age groups. This analysis can provide a better understanding of in- and out-migration. When the actual population is larger than would be predicted by natural birth and death rates, in-migration occurred. When the actual is less than would be predicted, then out-migration occurred. The difference in these numbers provides some understanding on the scale of in- or out-migration. **Figure 1.4** shows the situation county-wide where there was a large in-migration of family age cohorts. For individual cities (not shown here), this comparison indicates:

- Many cities were expected to decline naturally, a result of a lower number of births than deaths.
- Many cities outperformed the predicted population indicating strong in-migration during the decade.
- Lake Quivira, Leawood, Mission Hills, Mission Woods, and Prairie Village were predicted to lose population but instead gained population. The most significant reversal was Leawood's projected loss of 838 residents which in reality was a 4,749-resident gain.
    - For these cities, it means that older populations were likely replaced with larger households or large redevelopment projects that opened new land for residential development.
- The greatest in-migration occurred in Olathe and Overland Park, which experienced an additional 17,346 and 16,338 residents, respectively.

YOUTH & SENIOR POPULATION

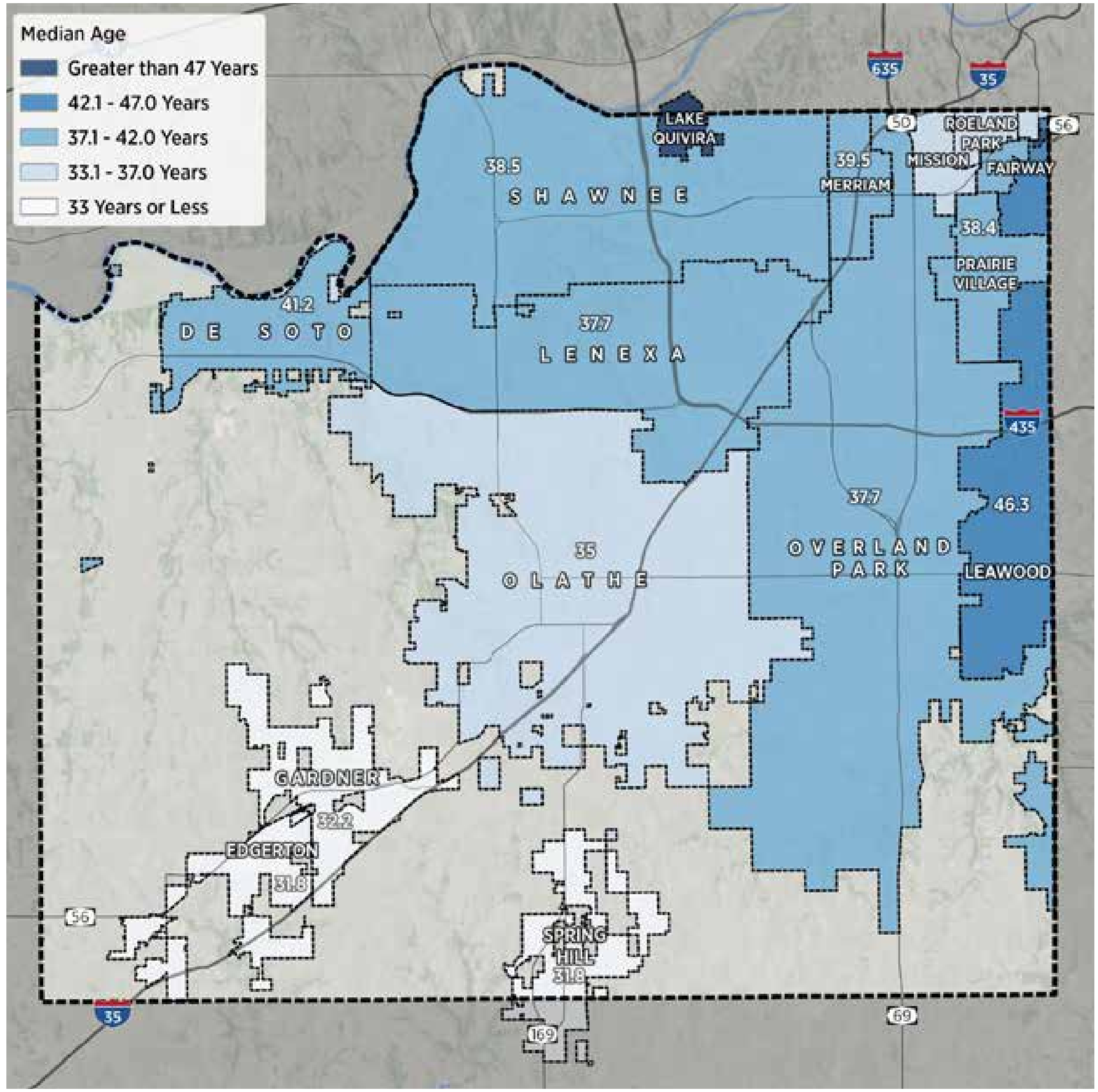
In Johnson County, there are significant differences in the age of households depending on the city. Typically, amenities, schools, and housing costs influence where family forming households will reside if given a choice. Schools are an especially attractive aspect in Johnson County compared to the rest of the Kansas City metro, as noted in input gathered through this study.

The lowest median household age occurs in Gardner, Spring Hill, and Edgerton at around 32 years old. This trend reflects a pattern of young families moving further out to communities with lower median home values. The median household age data above correlate with housing values. Younger households tend to be in cities with lower home values. Younger households may have higher other expenses and lack savings to live in other areas.

Conversely, nationally the number of individuals moving into their retirement years over the next ten years will be at the highest rates in history. This population shift will have an impact on the housing market. **Map 1.2** illustrates the median age in the larger communities of Johnson County.

The map shows that Mission Woods, Mission Hills, Lake Quivira, and Leawood have the highest median household age between 46 and 53 years old. This is an important factor when considering the demand for retirement housing in these areas or nearby communities. Retirement housing does not mean only assisted living but also universal design options.

MAP 1.2: MEDIAN AGE, 2018



Source: U.S. Census

FIGURE 1.5: POPULATION GROWTH FORECAST - JOHNSON COUNTY

	ANNUAL GROWTH RATE	2010	2018	2020	2025	2030	2020-'30 CHANGE
DE SOTO	1.89%	5,720	6,512	6,635	7,286	8,001	1,366
EDGERTON	1.44%	1,671	1,665	1,713	1,841	2,188	475
FAIRWAY	0.10%	3,882	3,947	3,955	3,974	3,994	39
GARDNER	2.65%	19,123	21,351	22,498	25,641	29,223	6,725
LAKE QUIVIRA	0.21%	906	982	986	997	1,007	21
LEAWOOD	0.71%	31,867	34,570	35,064	36,329	37,640	2,576
LENEXA	1.71%	48,190	53,051	54,878	59,725	65,001	10,123
MERRIAM	0.52%	11,003	11,243	11,359	11,656	11,959	600
MISSION	0.75%	9,323	9,437	9,579	9,944	10,322	743
MISSION HILLS	0.04%	3,498	3,580	3,583	3,591	3,599	16
MISSION WOODS	0.22%	178	177	178	180	182	4
OLATHE	1.38%	125,872	139,588	143,647	153,810	164,691	21,044
OVERLAND PARK	1.39%	173,372	196,625	199,350	213,554	228,770	29,420
PRAIRIE VILLAGE	0.19%	21,447	22,048	22,132	22,343	22,556	424
ROELAND PARK	0.06%	6,731	6,796	6,804	6,825	6,845	41
SHAWNEE	1.08%	62,209	65,239	66,659	70,344	74,233	7,575
SPRING HILLS	2.77%	5,437	6,976	7,409	8,611	9,872	2,463
WESTWOOD	0.43%	1,506	1,624	1,638	1,673	1,709	71
WESTWOOD HILLS	1.25%	359	378	388	412	439	51
UNINCORPORATED AREAS	-	11,885	-	13,046	-	14,873	
JOHNSON COUNTY TOTAL	1.32%	544,179	-	611,500	-	697,104	

Source: 2040 Forecast MARC (2014)*, RDG Planning & Design
*MARC Forecasts were updated in 2020 but city allocated forecasts were not available at the time of this study

PROJECTED GROWTH

Population forecasts completed by the Mid-America Regional Council (MARC) in 2014 provide estimates for population growth that many cities in the county use in local comprehensive plans.

For use in the housing demand models in Section 2, the forecasts in **Figure 1.5** considers the MARC forecast along with:

- Each city's residential building activity between 2010 and 2019.
- Any growth rates identified in city plans in the last five years, as available.
- The growth rate trend from 2000-2018, a period that includes two recessions with differing implications toward housing.
- Consideration of the possible population given each city's unique circumstances and near term development projects. For example, landlocked cities or cities close to full build-out have more restrictions on the feasible future growth such as available land, transportation connections, and public spaces.

These average annual growth rates consider times of recession and expansion, as well as future land development constraints in Johnson County. Under the uncertain circumstances in the second half of 2020, the annual growth could be smaller in the near term as the economy recovers from the 2020 pandemic. As expansionary economic conditions return, the annual growth rates could rise above the average to make up for pent-up demand. Section 2 goes into detail on demand forecasts for each community.

ECONOMIC ASSESSMENT

Johnson County's economy, including workforce needs, incomes, and unemployment rates, impact housing options and development. The following section provides an overview of basic economic characteristics and how these characteristics relate to housing.

HOUSEHOLD INCOME

Like many other counties on the edge of metropolitan areas, income disparities exist among Johnson County cities, as illustrated in Figure 1.6.

- 2018 estimated median household income ranges from as low as $52,364 in De Soto to $250,000 in Mission Hills. The median household income for the entire county is $85,746.
- Several of the smallest cities under 1,000 residents have median incomes above $100,000, while the two largest cities have median incomes in the mid- to low $80,000's.

FIGURE 1.6: 2018 MEDIAN HOUSEHOLD INCOME

	2018 POPULATION	2018 ESTIMATED MEDIAN HOUSEHOLD INCOME	80% OF MEDIAN	50% OF MEDIAN
DE SOTO	6,138	$52,364	$41,891.20	$26,182.00
EDGERTON	1,665	$54,125	$43,300.00	$27,062.50
FAIRWAY	3,947	$105,000	$84,000.00	$52,500.00
GARDNER	21,351	$75,985	$60,788.00	$37,992.50
LAKE QUIVIRA	982	$130,750	$104,600.00	$65,375.00
LEAWOOD	34,570	$149,736	$119,788.80	$74,868.00
LENEXA	55,294	$84,370	$67,496.00	$42,185.00
MERRIAM	11,243	$59,643	$47,714.40	$29,821.50
MISSION	9,437	$60,875	$48,700.00	$30,437.50
MISSION HILLS	3,580	$250,000+	$200,000.00	$125,000.00
MISSION WOODS	177	$165,000	$132,000.00	$82,500.00
OLATHE	139,588	$85,318	$68,254.40	$42,659.00
OVERLAND PARK	188,687	$82,651	$66,120.80	$41,325.50
PRAIRIE VILLAGE	22,048	$88,635	$70,908.00	$44,317.50
ROELAND PARK	6,796	$70,514	$56,411.20	$35,257.00
SHAWNEE	65,239	$84,507	$67,605.60	$42,253.50
SPRING HILLS	6,315	$72,384	$57,907.20	$36,192.00
WESTWOOD	1,624	$82,500	$66,000.00	$41,250.00
WESTWOOD HILLS	378	$132,500	$106,000.00	$66,250.00
JOHNSON COUNTY	585,502	$ 86,746	$69,396.80	$43,373.00

Source: American Community Survey (2018 5-year Estimates)

- When compared to surrounding counties (see **Figure 1.7**), Johnson County has the highest median household income, just above Clay County ($86,269) and well above Jackson County ($55,929). Johnson County has a comparable median income to comparison counties across the U.S.
- As expected, shown in **Map 1.3**, older working age cohorts tend to have higher incomes. However, family age cohorts are the top income earner in selected areas in Johnson County. This is likely because these are higher paying jobs, there are more housing choices, more attainable options, and/or household preferences.

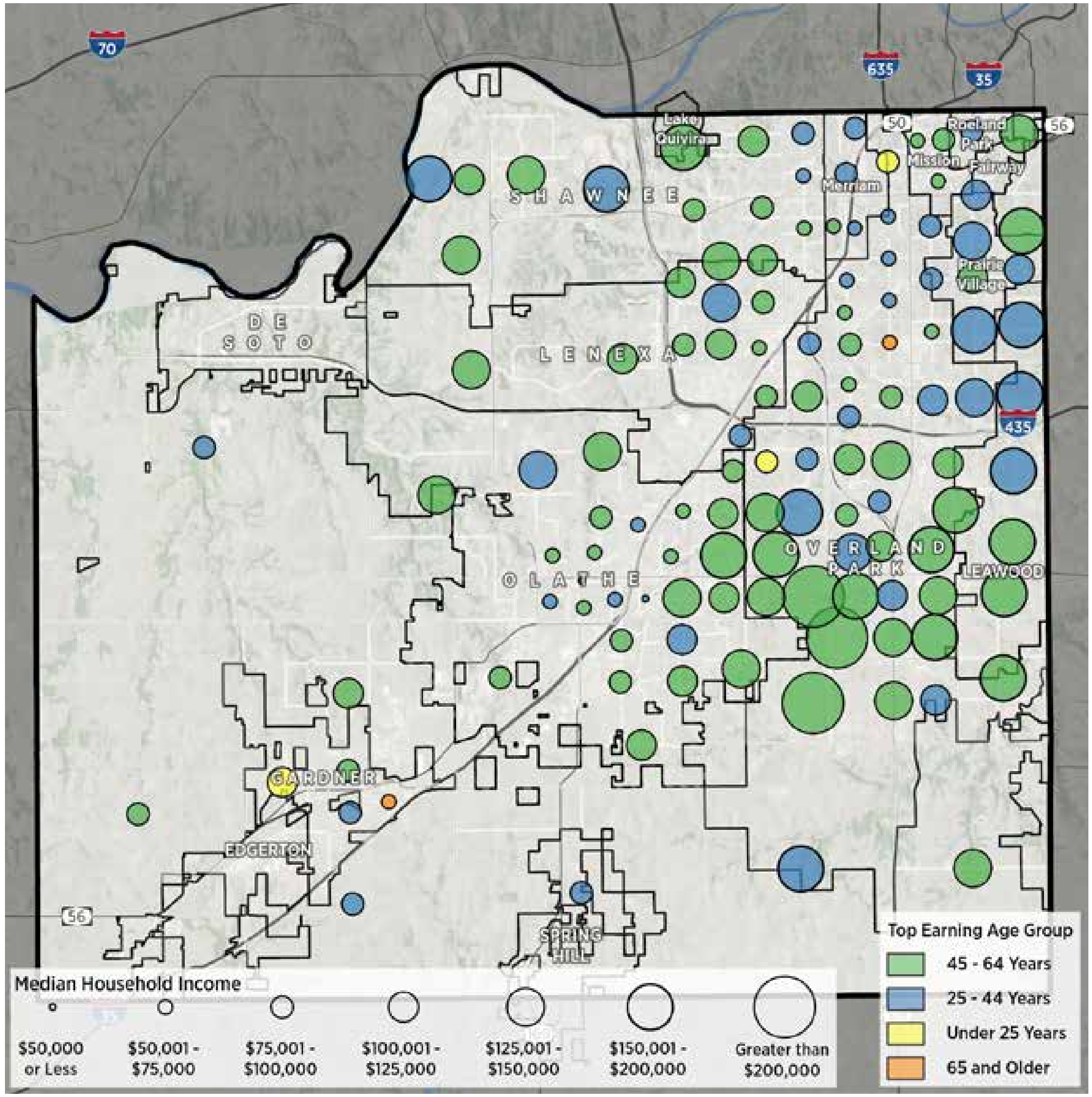
Other sections in this plan will show that lower median income in a city does not always correlate to household housing cost burdens. Instead, the combination of income, housing costs, and transportation costs together determine cost burdens.

FIGURE 1.7: 2018 MEDIAN HOUSEHOLD INCOME (COMPARABLE COUNTIES)

JOHNSON COUNTY	$ 86,746
CASS, MO	$71,114
CLAY, MO	$86,269
JACKSON, MO	$55,929
PLATTE, MO	$80,468
WYANDOTTE, KS	$47,285
DAKOTA, MN	$86,302
WAUKESHA, WI	$86,968
JEFFERSON, CO	$85,890
DENTON, TX	$88,117

Source: American Community Survey (2018 5-year Estimates)

MAP 1.3: MEDIAN HOUSEHOLD INCOME OF HIGHEST EARNING AGE GROUP, 2018



Source: American Community Survey (2018 5-year Estimates)

EMPLOYMENT

The struggle for every region lies in striking an appropriate balance between workforce development, housing, and job growth—all of which must go together. Data provided in **Figure 1.8** uses the American Community Survey (2018 5-year Estimates) (ACS) estimates to illustrate labor force participation and unemployment rates.

- According to the 2018 ACS estimates, nearly every city is at or below the state unemployment rate of 2.9%.
- The Bureau of Labor Statistics estimated the unemployment rate in March 2020 to be at 2.5% in Johnson County, which has since shot up to 10.6% in April 2020 during a post-COVID economic climate.

The 2020 pandemic created quick and drastic changes in the employment characteristics in Johnson County. The unemployment rate rose to as high as 10.6% in April of 2020 and, at the time of this study, had fallen to 4.4% in October of 2020. However, some of the decline is attributed to unemployed people who have stopped looking for work. These people are not counted in unemployment figures.

The very low unemployment rates pre-pandemic meant that employers needed to recruit from the larger region, outside the region, and the state. The high unemployment rate during the 2020 pandemic is mostly temporary and permanent retail, food, and personal service job losses. The full extent of permanent job losses will not be known until well into 2021. However, current data and analysis show that skilled labor and white-collar positions are still in demand and likely less affected.

JOBS AND EDUCATION

As indicated in the previous section on employment rates, the region has a strong economy. The dominant industry sector in Johnson County is educational services, and health care and social assistance. Professional, scientific, and management, and administrative and waste management services rank higher as the top employment industry in four cities.

Employers' needs usually have a direct impact on the education and income levels of a region. The workforce of Johnson County has a high level of educational attainment. Only 17% of the workforce has either a high school degree or less and 57% of the workforce has a bachelor's degree or higher.

FIGURE 1.8: 2018 UNEMPLOYMENT RATE

	2018 POPULATION	LABOR FORCE	2018 UN-EMPLOYMENT RATE*
DE SOTO	6,138	3,144	2.2%
EDGERTON	1,665	904	3%
FAIRWAY	3,947	2,022	0.5%
GARDNER	21,351	11,599	2.8%
LAKE QUIVIRA	982	422	1.6%
LEAWOOD	34,570	17,071	1.5%
LENEXA	55,294	30,871	1.9%
MERRIAM	11,243	6,982	2.5%
MISSION	9,437	6,047	1.5%
MISSION HILLS	3,580	1,609	0.3%
MISSION WOODS	177	95	0%
OLATHE	139,588	77,036	2.3%
OVERLAND PARK	188,687	107,393	2.4%
PRAIRIE VILLAGE	22,048	12,132	1.2%
ROELAND PARK	6,796	4,376	3.1%
SHAWNEE	65,239	37,355	2.6%
SPRING HILLS	6,315	3,243	1.9%
WESTWOOD	1,624	931	2.8%
WESTWOOD HILLS	378	211	1%
JOHNSON COUNTY	585,502	456,249	3.1%
STATE OF KANSAS	2,911,510		2.9%

Source: American Community Survey (2018 5-year Estimates); Bureau of Labor Statistics
*The pandemic significantly increased unemployment in 2020 and expected to carry into 2021 - at 4.4% as of Oct. 2020.

COMMUTING PATTERNS

The balance between jobs and housing has become an important community and economic development issue. **Figure 1.9** illustrates the daily export and influx of workers in the region. Below are key highlights of regional community patterns.

- Johnson County's workforce is composed of just over half by workers that reside in the county and just under half that commute in for work each day. Since 2010 this has remained relatively the same, with 55% residing and working in Johnson County and 45% commuting to work.
- For in-commuters, most residents come from either Jackson County, Missouri (14.3%), or Wyandotte County, Kansas (7.4%).

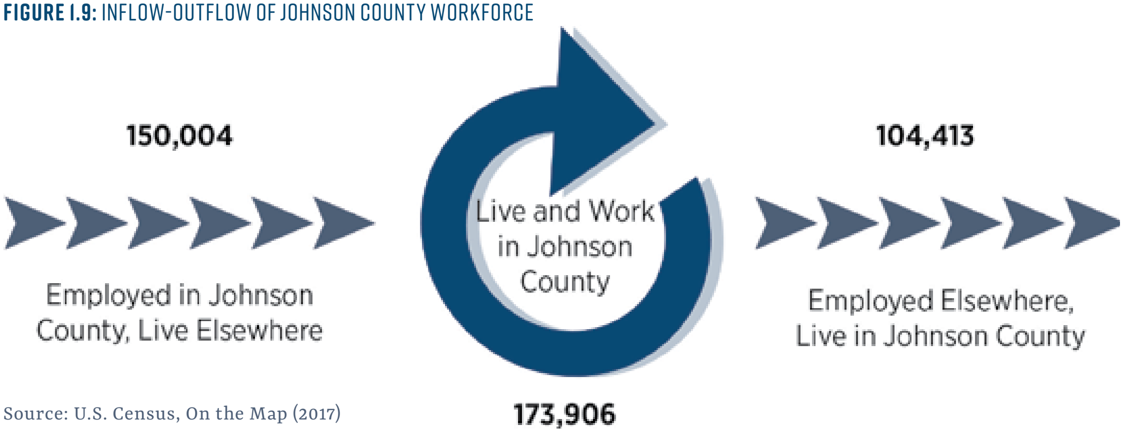
For those living and working in Johnson County, commuting can still be an issue where households live and work in different cities. As a metropolitan area, travel times can significantly increase with congestion.

Figure 1.10 shows community patterns within Johnson County.

- About 37% of employed people that live in Johnson County travel more than 10 miles to work.
- About 25% of those that live in Johnson County travel northeast to their workplace, whether in Johnson County or not. The area in northeast Johnson County and beyond is the core of the Kansas City metro. In congestion, even a commuting distance of 10 miles can take over 30 minutes.
- Just over 22% of workers who live in Johnson County work in Kansas City, MO/KS.

People may choose to live in a place for many reasons. Often, a spouse works locally while the other spouse must commute longer to work. However, as illustrated in other parts of the section, where a household can find attainable housing that meets their needs is often a leading factor in housing choice.

FIGURE 1.9: INFLOW-OUTFLOW OF JOHNSON COUNTY WORKFORCE



Source: U.S. Census, On the Map (2017)

FIGURE 1.10: RESIDENT WORK DESTINATION & DISTANCE

DISTANCE	COUNT	SHARE
TOTAL PRIMARY JOBS	**278,319**	**100.0%**
LESS THAN 10 MILES	174,925	62.9%
10 TO 24 MILES	73,714	26.5%
25 TO 50 MILES	9,206	3.3%
GREATER THAN 50 MILES	20,474	7.4%
DIRECTION		
OVERLAND PARK CITY, KS	67,394	24.2%
KANSAS CITY CITY, MO	41,947	15.1%
OLATHE CITY, KS	36,618	13.2%
LENEXA CITY, KS	27,877	10.0%
KANSAS CITY CITY, KS	19,974	7.2%
LEAWOOD CITY, KS	9,242	3.3%
SHAWNEE CITY, KS	8,834	3.2%
MERRIAM CITY, KS	6,624	2.4%
MISSION CITY, KS	3,754	1.3%
WICHITA CITY, KS	3,606	1.3%
TOPEKA CITY, KS	3,455	1.2%
ALL OTHER LOCATIONS	48,994	17.6%

Source: U.S. Census, On the Map 2017

"[My] Husband works at the [Logistics Park Kansas City] Intermodal Facility and nearly everyone he works with lives in KCMO on the MO side because housing there is cheaper even with gas money..."

- Survey Respondent

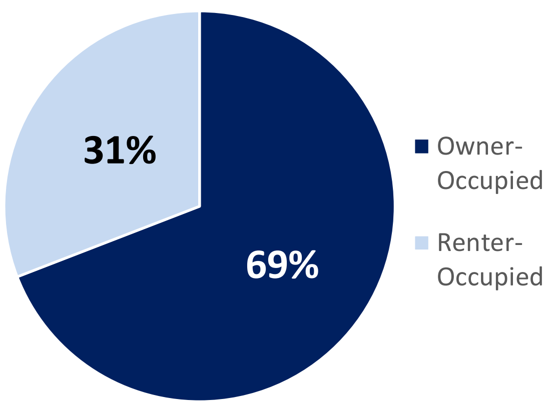
HOUSING & HOUSEHOLD ASSESSMENTS

In the following chapter, an assessment of housing and household trends will be provided for each of the cities in Johnson County. This section offers an opportunity to compare housing trends by city directly.

HOUSING OCCUPANCY

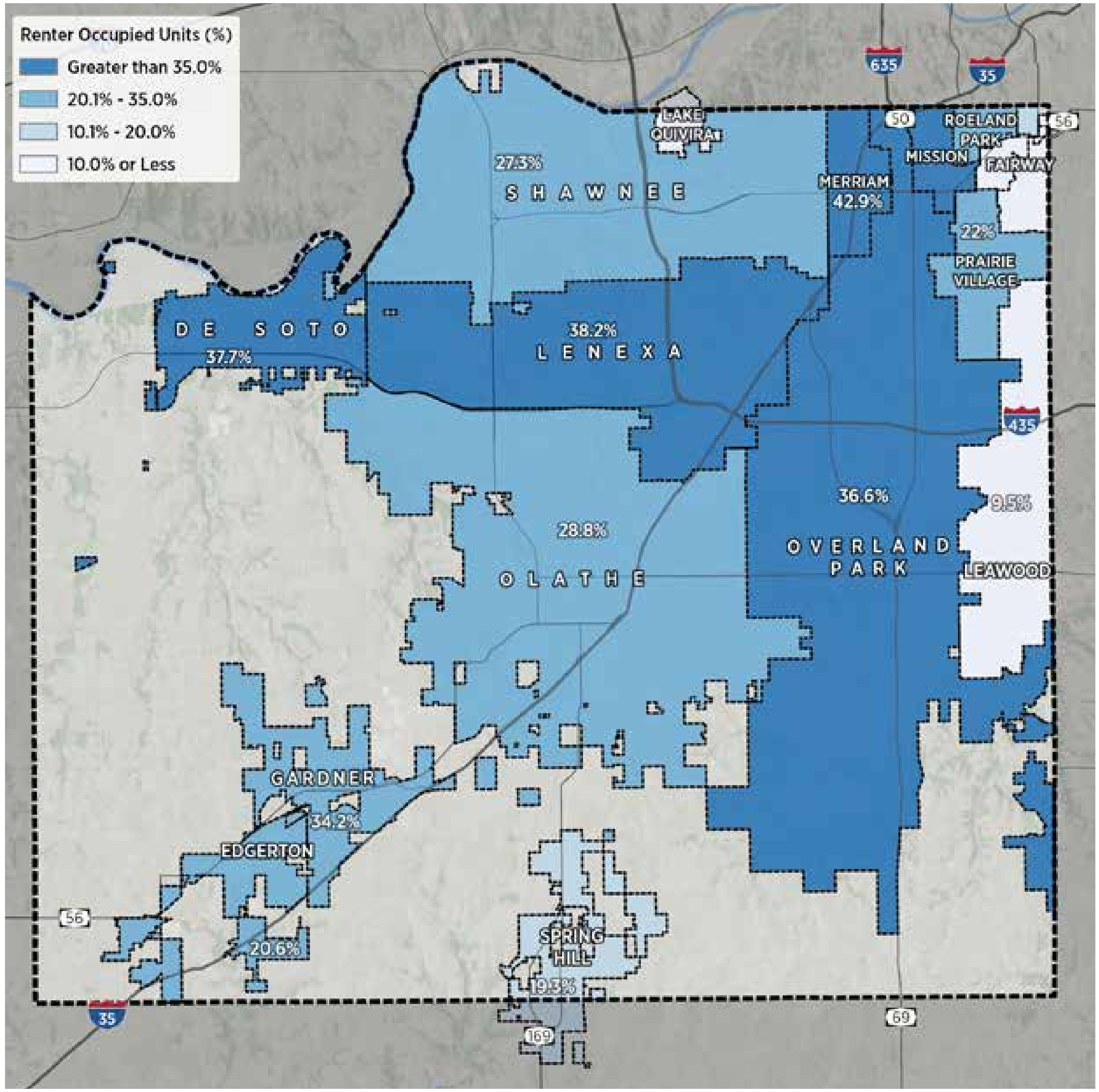
The county is mostly owner-occupied housing units (see **Figure 1.11**). **Map 1.4** illustrates the areas with the highest renter-occupied housing units which are clustered around Merriam, Lenexa, Overland Park, and De Soto. The only city with more rental units than owner-occupied units is Mission (46.1% owner-occupied). Several communities have owner-occupancy rates above 90% (Fairway, Lake Quivira, Leawood, Mission Hills, Mission Woods, Westwood Hills). Overall, Johnson County has an owner-renter ratio of 69%-31%, which has remained nearly the same since 2010.

FIGURE 1.11: OWNER VERSUS RENTER HOUSEHOLDS (JOHNSON COUNTY)



Source: American Community Survey (2018 5-year Estimates)

MAP 1.4: PERCENT OF RENTER OCCUPIED UNITS BY CITY IN JOHNSON COUNTY



Source: American Community Survey (2018 5-year Estimates)

As **Figure 1.12** illustrates, Johnson County has an average owner-occupancy rate comparable to, but slightly lower than, many counties in the region and the comparison counties across the nation.

Vacancy rates in the region vary widely, some exceeding 15% (Westwood and Lake Quivira), others falling below 3% (Mission Woods and Olathe), as shown in **Figure 1.13**. A healthy, self-sustaining vacancy rate is around 7% which allows movement in the market. For the most part, vacancy rates in each community have remained steady since 2010, some rising a few percentages others falling at the same rate. Westwood and Lake Quivira, however, saw nearly 10% spikes in their vacancy rate over the eight years. Note, small city populations can produce large margins of errors in Census estimates.

Johnson County's vacancy rate is low when compared to the counties in the region. Only Cass County, Missouri, has a lower vacancy rate according to the American Community Survey data. Both Jackson County and Wyandotte County have an 11.8% vacancy rate. When measured against comparison counties, vacancy rates in Johnson County are healthy and in the middle.

FIGURE 1.12: OWNER-OCCUPIED UNITS AND VACANCY RATES OF COMPARABLE COUNTIES

	% OWNER-OCCUPIED UNITS	VACANCY RATE ALL UNITS
JOHNSON COUNTY	69.1%	5.2%
CASS, MO	76.2%	4.8%
CLAY, MO	69.1%	6.9%
JACKSON, MO	58.5%	11.8%
PLATTE, MO	65.8%	6.5%
WYANDOTTE, KS	57.1%	11.8%
DAKOTA, MN	74.3%	3.0%
WAUKESHA, WI	76.4%	4.3%
JEFFERSON, CO	70.4%	3.6%
DENTON, TX	64.5%	5.5%

Source: American Community Survey (2018 5-year Estimates)

FIGURE 1.13: OWNER-OCCUPANCY AND TOTAL VACANCY RATES FOR ALL UNITS, 2010 AND 2018

	2010		2018	
	% OWNER OCCUPIED UNITS IN THE CITY	VACANCY RATE ALL UNITS	% OWNER OCCUPIED UNITS IN THE CITY	VACANCY RATE ALL UNITS
DE SOTO	67.7%	8.9%	62.3%	8.5%
EDGERTON	36.5%	8.4%	79.4%	8.2%
FAIRWAY	87.9%	4.6%	91.9%	7.2%
GARDNER	72.0%	9.0%	65.8%	6.8%
LAKE QUIVIRA	92.4%	5.3%	99.4%	16.0%
LEAWOOD	92.4%	4.9%	90.5%	4.7%
LENEXA	62.9%	7.4%	61.8%	5.4%
MERRIAM	59.7%	6.2%	57.1%	5.9%
MISSION	48.9%	8.7%	46.1%	5.8%
MISSION HILLS	98.8%	5.5%	98.6%	8.6%
MISSION WOODS	96.1%	3.8%	97.4%	2.5%
OLATHE	72.7%	5.0%	70.8%	2.6%
OVERLAND PARK	65.2%	6.3%	63.0%	5.8%
PRAIRIE VILLAGE	81.4%	4.5%	78.0%	6.8%
ROELAND PARK	77.3%	6.6%	74.4%	6.7%
SHAWNEE	73.1%	5.2%	72.7%	4.2%
SPRING HILL	76.8%	7.2%	80.7%	3.6%
WESTWOOD	85.3%	5.3%	84.6%	15.4%
WESTWOOD HILLS	91.6%	5.6%	90.6%	6.6%
JOHNSON COUNTY	70.8%	6.0%	69.1%	5.2%

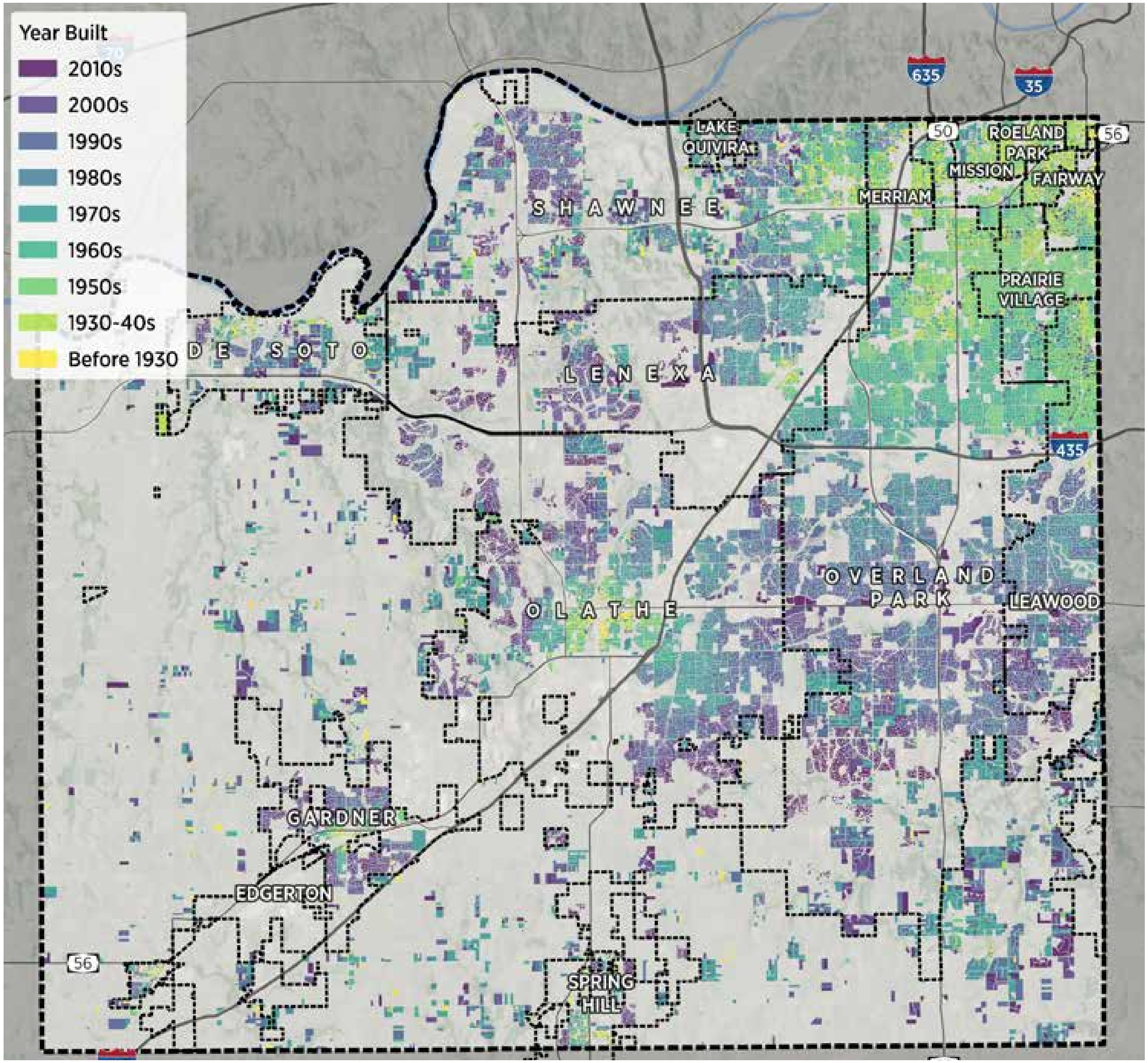
Source: U.S. Census; American Community Survey (2018 5-year Estimates)

AGE OF HOUSING

As shown on **Map 1.5**, the region's older housing stock is predominantly located in northeast Johnson County. These homes are 40-plus-years-old, and if not updated and well maintained, these units may begin to show structural issues. Communities such as Shawnee, Lenexa, Overland Park, and Leawood have a housing stock built primarily since the 1960s, with most of the housing built since 2000.

Additionally, it is not uncommon that the oldest and smallest homes within cities are being used as rentals with a high perception of low property maintenance. Whether rentals or owner-occupied housing, the older housing stock is often, but not always, Johnson County's best source of attainable housing - housing priced below $225,000 and renting below $1,000 a month.

MAP 1.5: AGE OF HOUSING STOCK



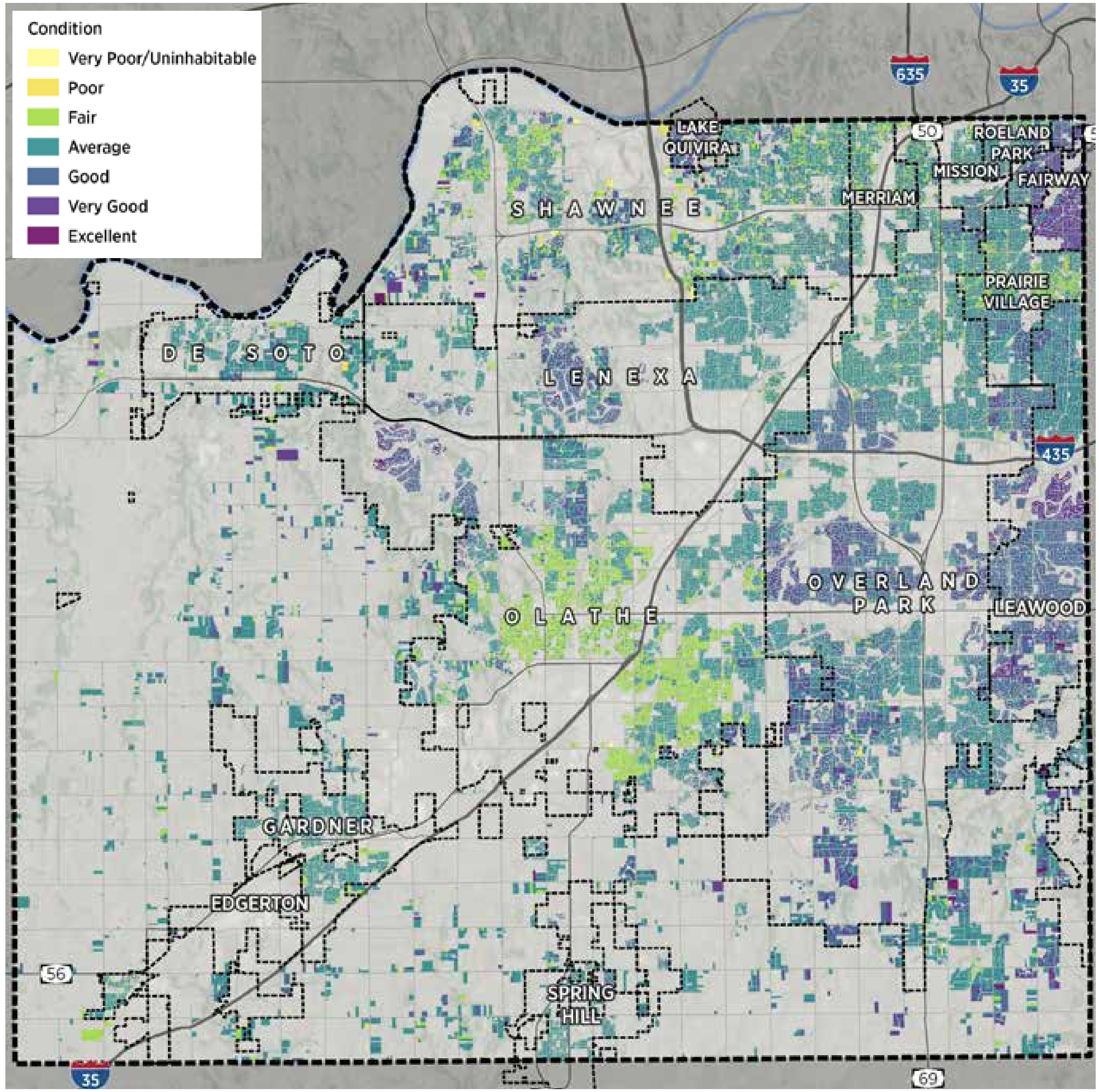
Source: Johnson County GIS Department, Assessor Data

HOUSING CONDITION

Map 1.6 shows housing conditions. As in most communities, housing condition tends to correlate positively with housing age. Areas in historic town centers tend to have lower condition of housing. However, there are few areas in Johnson County with concentrated housing below fair condition.

> "...Rehab loans with very low interest are a great way to help people buy something affordable and fix it up!..."
>
> - Survey Respondent

MAP 1.6: HOUSING CONDITION



Source: Johnson County GIS Department, Assessor Data Ratings

CONSTRUCTION ACTIVITY

Construction activity varies by each city. In the past ten years, some cities saw rapid home construction while others saw little. Multi-family development is sporadic across the county depending on the redevelopment opportunities in landlocked cities and town centers and growth areas near transportation or commercial nodes. **Map 1.7** highlights the areas with the most construction activity between 2015 and 2019.

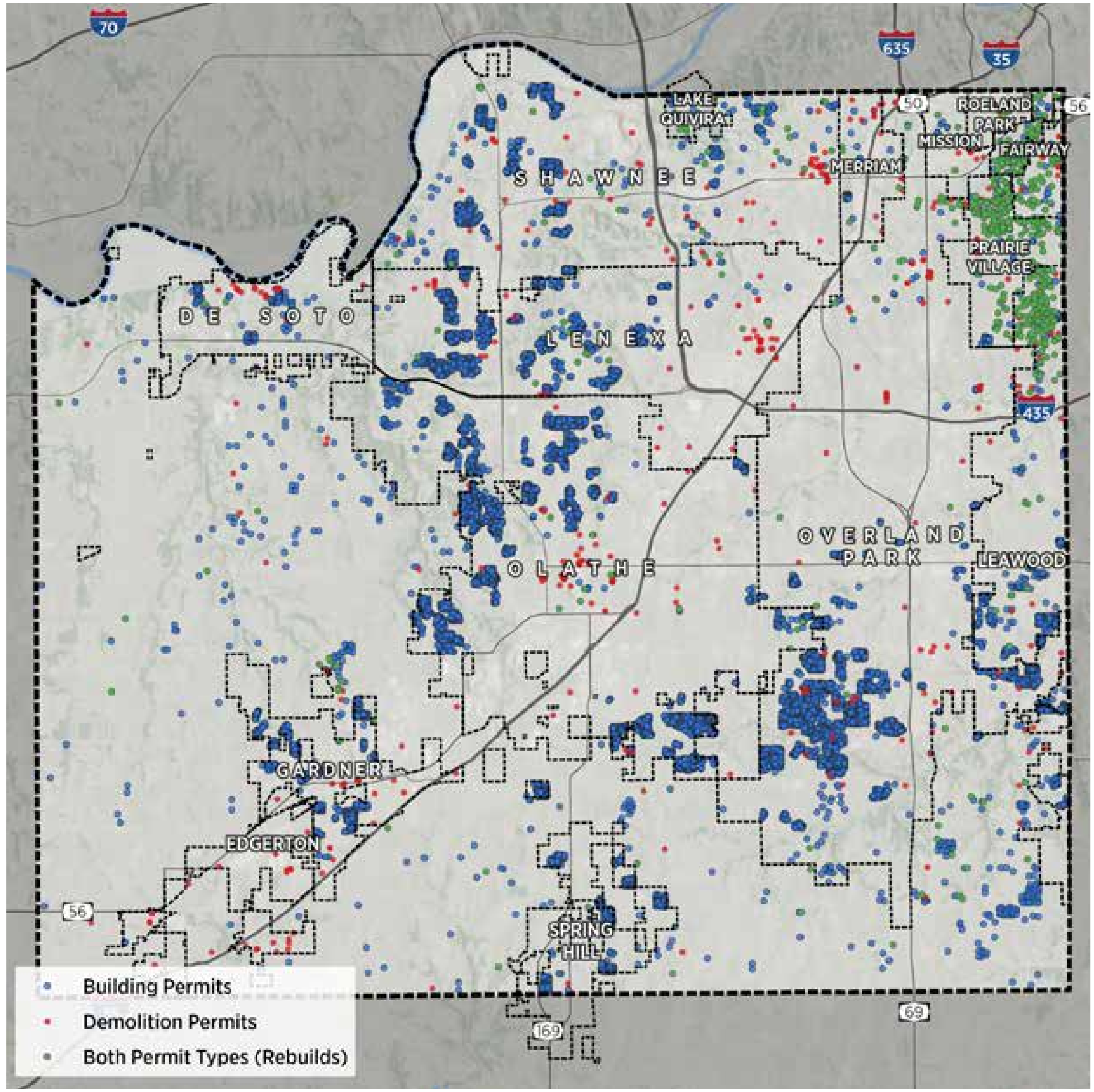
There is significant demolition and rebuild activity occurring in some of the landlocked cities in northeast Johnson County. The rebuilds are typically larger homes and in some cities has led to minor population growth from larger household sizes.

"Much of the new construction is luxury apartments. Would love for the city to purchase land/housing to build affordable fourplexes, granny flats, etc." *

- Survey Respondent

*See Chapter 8 for partnership possibilities and strategies where cities can help stimulate such development

MAP 1.7: CONSTRUCTION ACTIVITY 2015-2019



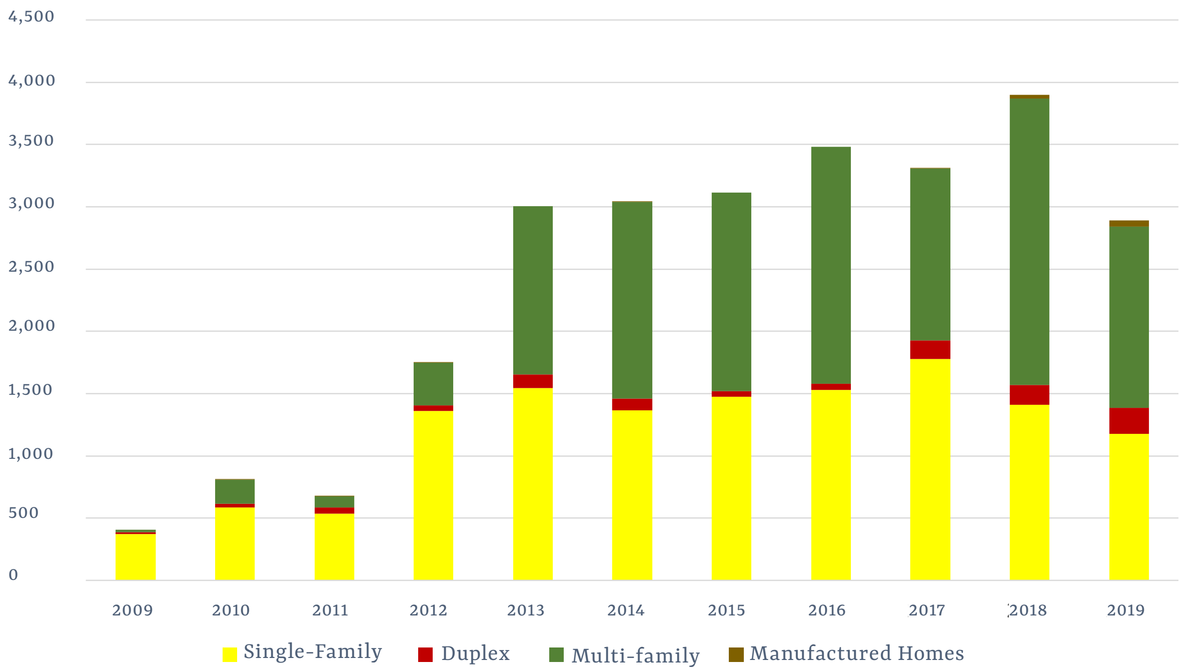
Source: Johnson County GIS Department

Figure 1.14 shows the construction of new housing units by type from 2009-2019. Most of the building permits for new residential construction are clustered around Overland Park, Lenexa, Shawnee, and Olathe. Although Gardner saw an increase recently with significant growth in duplexes. On a percentage of population basis, Gardner and Spring Hill are also emerging as high growth markets for new construction. Since the housing rebound after the 2008 recession, multi-family construction is mostly happening in larger cities like Lenexa, Olathe, Overland Park, and Shawnee.

"How we come out of the COVID-19 Pandemic can significantly impact construction, lending practices, jobs, and whether or not [COVID-19] impacted businesses can survive. These issues will determine the level of new construction, availability of loans and the extent of changes to the loan underwriting process and people's ability to regain the financial capabilities lost during the Pandemic."

- Survey Respondent

FIGURE 1.14: RESIDENTIAL NEW BUILDING PERMIT DATA 2009-2019



Source: Johnson County Cities

LOT AVAILABILITY

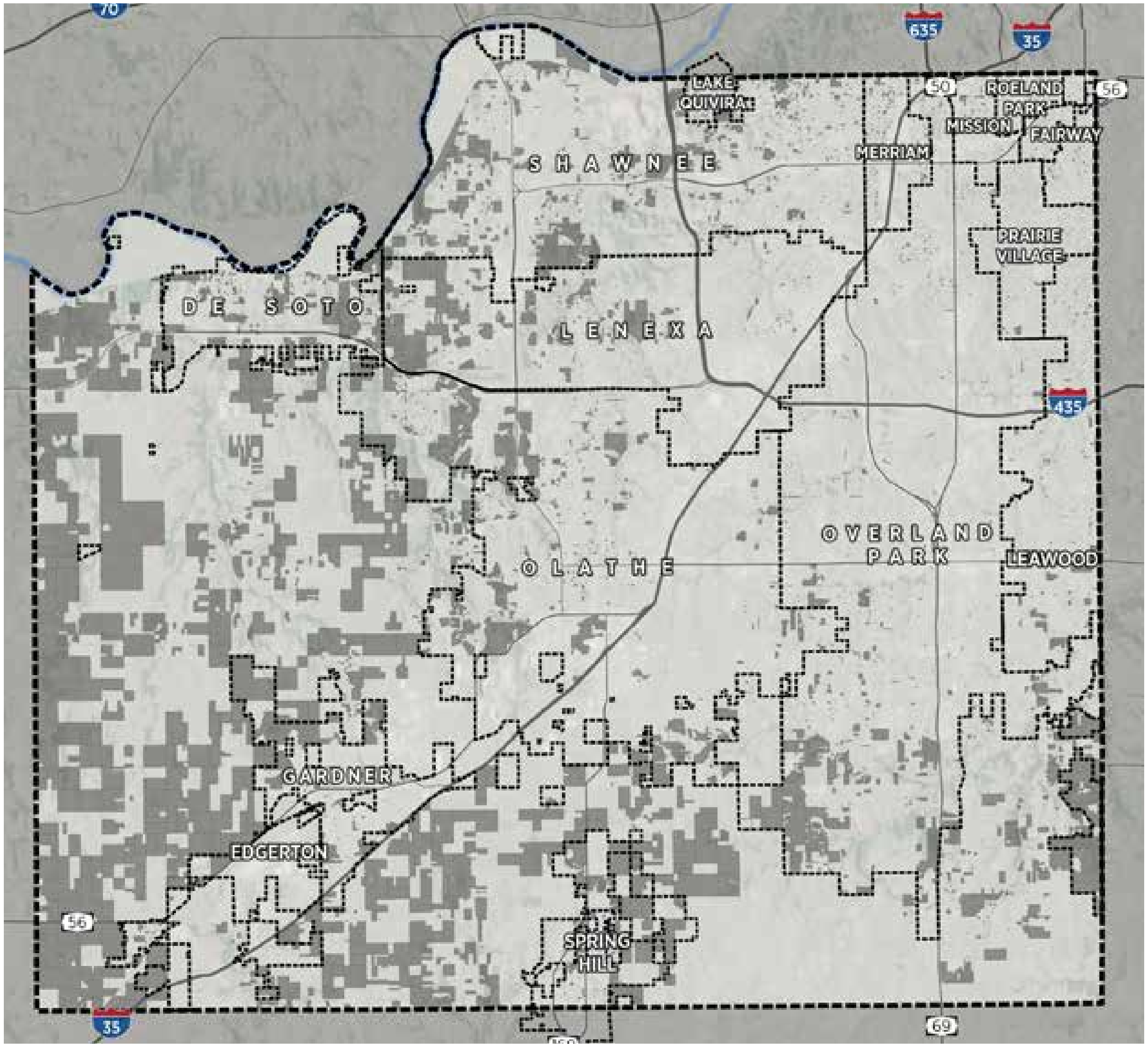
Map 1.8 illustrates the vacant tracks of land within Johnson County that have residential designations on city future land use maps. Most of the available land is located on the west and south sides of the county. Areas in the northeast are relatively built out, with only small scattered sites available for new development. The availability of lots does not necessarily mean they are or will be easy to develop. Most lack utilities, which adds to the cost of development.

JOHNSON COUNTY UNINCORPORATED AREAS

Much of the vacant land is not within a city's limits. However, building activity is spread throughout these areas and areas that will eventually be annexed into city limits. The Johnson County Comprehensive Plan guides growth in these areas. The specific framework for development in these areas includes:

- **Continued Slow Growth in the Unincorporated Area**
- **Natural Resources Protection**
- **Continued Agriculture Production**
- **"Sense of Community" and "Sense of Place" Development Quality**
- **Limited Housing Choices (low-density residences)**
- **Fiscal Responsibility - Adequate and Cost Effective Infrastructure and Public Services**
- **County/City Coordination**
- **Public Services and Utilities Coordination**
- **Quality Transportation**
- **Predictability and Public Involvement**

MAP 1.8: VACANT LAND, 2020



Source: Johnson County GIS Department

Reference here for more information:

https://www.jocogov.org/sites/default/files/documents/PLN/Rural%20Comprehensive%20Plan.pdf

To this end, cities should grow in a contiguous and efficient manner based on logical public infrastructure provision and sustainability of financial and environmental resources.

HOME SALES AND RENTALS - MLS DATA

Information for Johnson County in **Figure 1.15** shows several indicators of a tight housing market with high demand and low supply. Through July of 2020:

- Average sales price rose 6.6% from 2019 to $369,259.
- The days a home was on the market until sale remained low at 46.
- Homes are generally selling at the asking price.
- Inventory has fallen by 44%.

Data for home sales between 2017 and 2019 reveal differing trends by each city.

- In all cities, average sales prices increased from 2017 to 2019. Mission Woods and Mission Hills were the exceptions where homes are already selling over $1 million.
- The average days a home was on the market, including time from offer to closing, consistently declined in most cities. This means there was a high demand for homes, either because of many buyers or low inventory. Spring Hill is a significant outlier, perhaps because of several unique homes sitting on the market.

FIGURE 1.15: SINGLE-FAMILY HOUSING MLS DATA - 2017-2019

	2017			2018			2019		
	AVERAGE SALES PRICE	# SOLD	AVERAGE DAYS ON MARKET	AVERAGE SALES PRICE	# SOLD	AVERAGE DAYS ON MARKET	AVERAGE SALES PRICE	# SOLD	AVERAGE DAYS ON MARKET
DE SOTO	$262,806	77	69	$265,740	70	66	$313,485	84	61
EDGERTON	$165,411	47	74	$224,554	59	99	$210,121	51	47
FAIRWAY	NO DATA								
GARDNER	$210,845	506	20	$232,844	496	54	$245,525	475	15
LAKE QUIVIRA	NO DATA								
LEAWOOD	$549,048	531	55	$611,145	504	57	$576,719	393	55
LENEXA	$334,658	789	39	$358,217	795	40	$358,233	819	50
MERRIAM	$190,726	137	41	$200,927	167	23	$217,208	149	21
MISSION	$203,868	172	23	$223,332	177	20	$249,010	166	20
MISSION HILLS/ WOODS	$1,217,275	67	160	$1,031,955	72	106	$1,013,311	77	66
OLATHE	$286,686	2,531	54	$301,180	2,509	66	$321,479	2,339	48
OVERLAND PARK	$356,222	2,772	52	$369,605	2,650	69	$382,762	2,716	64
PRAIRIE VILLAGE	$334,243	547	42	$346,559	583	29	$370,227	584	35
ROELAND PARK	$207,603	179	14	$216,727	190	42	$230,582	166	14
SHAWNEE	$277,776	1,109	39	$299,333	1,004	70	$307,664	1,060	38
SPRING HILL	$267,579	163	90	$299,383	212	114	$308,444	207	287
WESTWOOD	NO DATA								
WESTWOOD HILLS	NO DATA								

Source: Multiple Listings Service (MLS) - All sales, including new construction and re-sale of existing homes

A search of available rental units on Zillow.com in June 2020 returned 366 results. A surprising number of rental units were shown available in Mission Woods and Mission Hills, cities with high owner-occupancy. Units in these areas had higher listed rents of between $1,000 for a 1-bedroom, 1-bathroom, and $3,500 for a 3-bedroom, 3-bathroom unit. Present data illustrates a tight market for rental units. It remains to be seen how the 2020 pandemic will impact rental demand and supply.

HOUSING COST

This section looks at housing costs from different perspectives, including median home value, mortgages, rents, and cost of housing to income.

ASSESSED VALUE

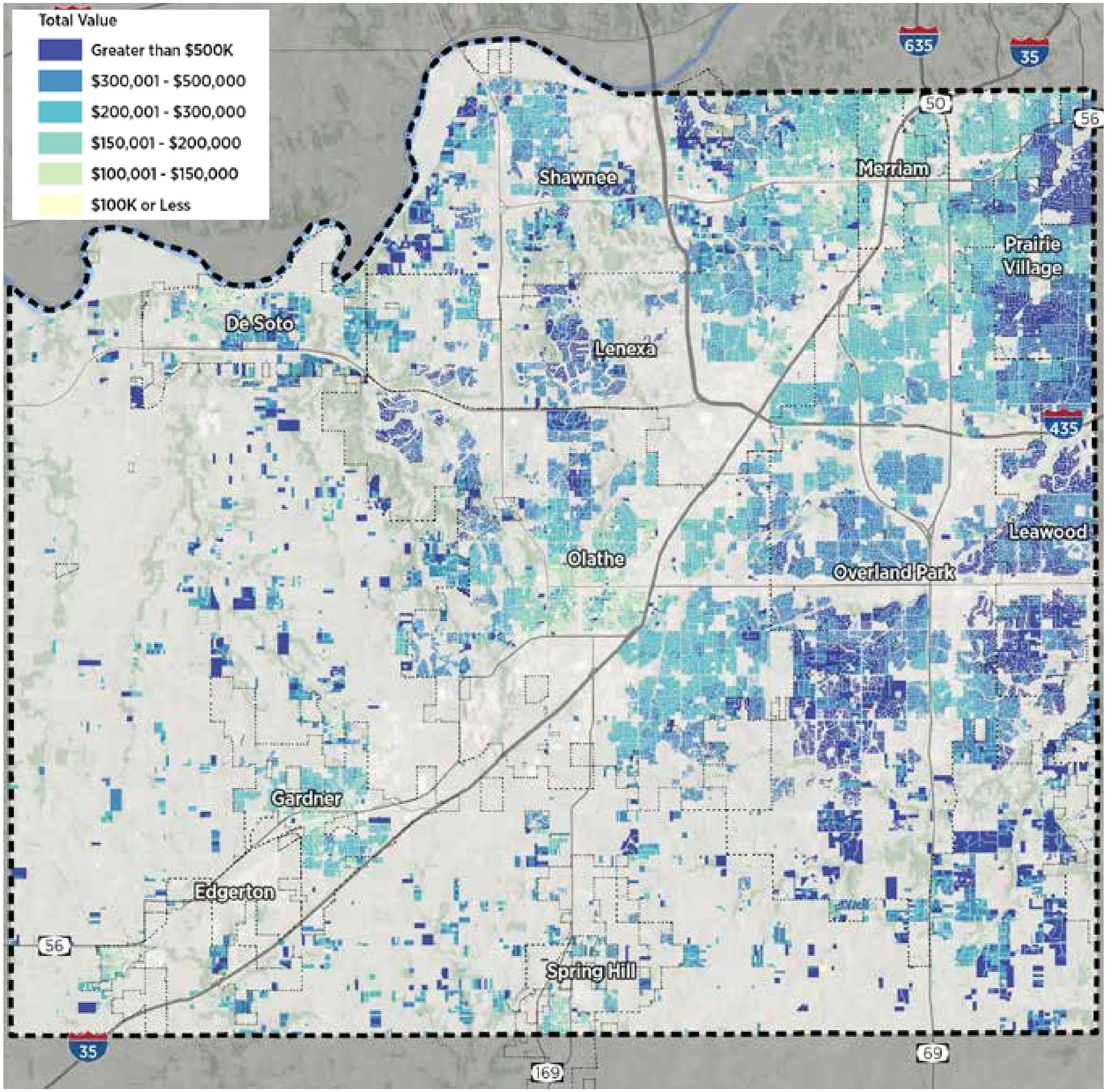
Factors like condition, age, and amenities influence home value as best reflected in assessed valuations.

- Johnson County keeps a detailed assessed value of homes, which provides more specific detail on the tax burdens for homeowners and dispersion of value within cities. As expected, **Map 1.9** shows lower assessed values occur in the town core of larger cities and generally correlated with home age.

"We... own a single family home. It is 900 square feet and not enough space. We both work full time jobs with higher ed degrees and cannot afford anything bigger in the area."

- Survey Respondent

MAP 1.9: ASSESSED VALUES

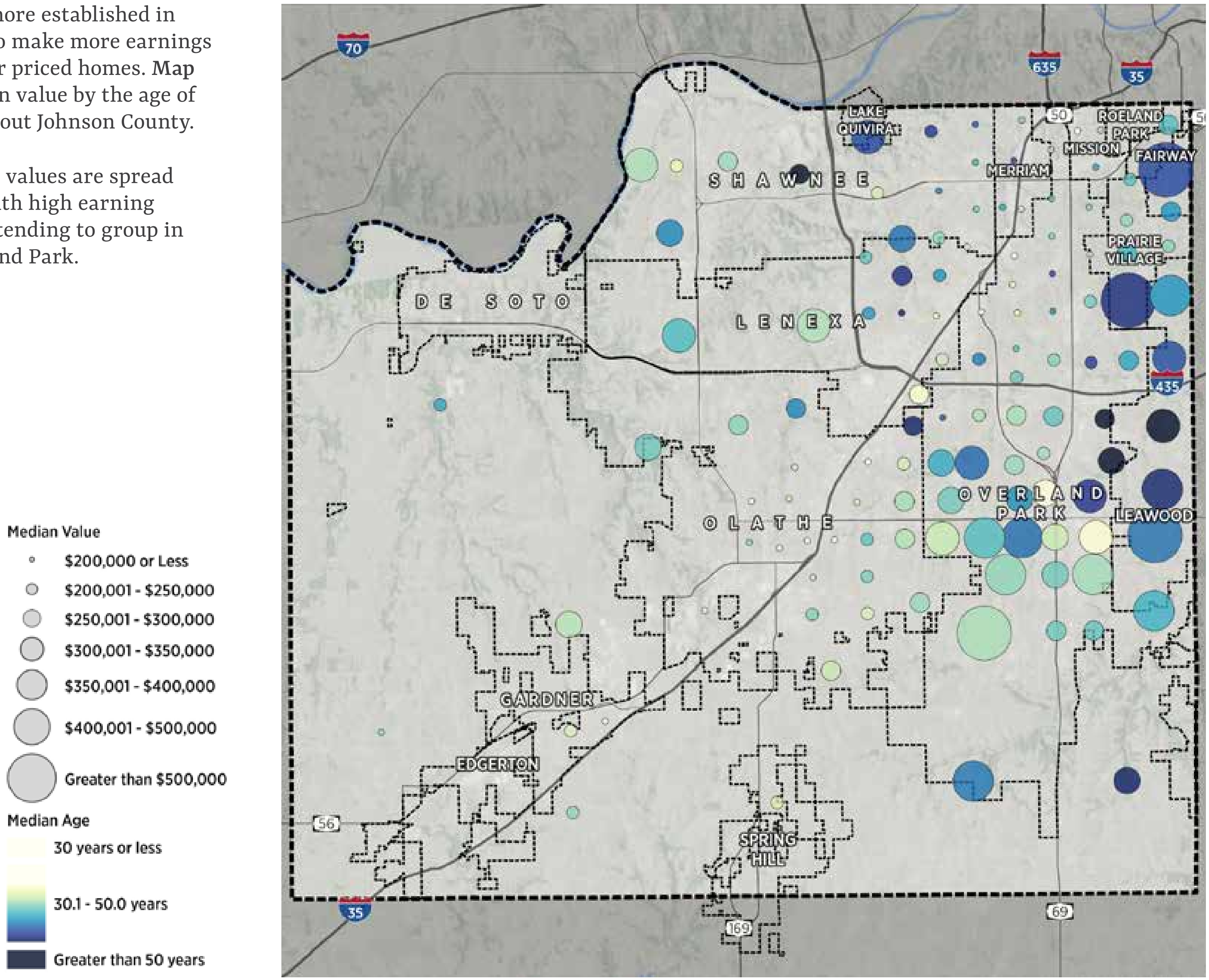


Source: Johnson County

The age of households often correlates with home value. People more established in the workforce tend to make more earnings and can afford higher priced homes. **Map 1.10** shows the median value by the age of householder throughout Johnson County.

Higher median home values are spread across age groups, with high earning younger households tending to group in south-central Overland Park.

MAP 1.10: MEDIAN VALUE BY AGE OF HOUSEHOLDER



Source: American Community Survey (2018 5-year Estimates)

OWNER OCCUPIED

The median home value in Johnson County is $244,100. As **Figure 1.16** shows, the median home value varies greatly across the county. Mission Hills has a median home value of $976,200 while Roeland Park is only $164,100. Since 2010, the value of homes in Johnson County has risen significantly on average.

The highest increase in value between 2010 and 2018, according to the American Community Survey (2018 5-year Estimates) is Spring Hill, Prairie Village. Fairway, and Lake Quivira. Home values do not appear to be related to a city's geographical location in the county. Cities like Mission Woods, Mission, and Merriam have seen slight value growth, although they are near other cities with high-value growth.

RENTER OCCUPIED

Contract rent is the rent agreed upon regardless of any furnishings, utilities, or services that may be included. In Johnson County, the median contract rent is $884 (see Figure 1.16), up from $715 in 2010. Median contract rent varies greatly across cities, dropping as low as $634 in Spring Hill to as high as $1,750 in Westwood Hills. The areas with the highest rents are also those with the lowest share of renter-occupied units in their housing market.

FIGURE 1.16: HOUSING AFFORDABILITY, 2018

	MEDIAN HOUSEHOLD INCOME	MEDIAN HOUSE VALUE	MEDIAN MONTHLY COSTS WITH A MORTGAGE	MEDIAN CONTRACT RENT	OWNERS PAYING MORE THAN 30% OF INCOME ON HOUSING	RENTERS PAYING MORE THAN 30% OF INCOME ON HOUSING
DE SOTO	$52,364	$203,200	$1,839	$642	17%	51%
EDGERTON	$54,125	$121,200	$1,235	$756	22%	39%
FAIRWAY	$105,000	$352,200	$2.121	$1,136	19%	59%
GARDNER	$75,985	$178,700	$1.517	$835	17%	32%
LAKE QUIVIRA	$130,750	$596,200	$1,349	*	28%	*
LEAWOOD	$149,736	$447,100	$2,638	$1,574	20%	49%
LENEXA	$84,370	$248,800	$1,786	$907	14%	42%
MERRIAM	$59,643	$160,100	$1,315	$784	13%	43%
MISSION	$60,875	$169,500	$1,447	$812	23%	37%
MISSION HILLS	$250,000	$976,200	$4,000+	*	20%	*
MISSION WOODS	$165,000	$656,300	$3,250	*	9%	*
OLATHE	$85,318	$224,000	$1,687	$796	16%	43%
OVERLAND PARK	$82,651	$261,200	$1,792	$948	16%	37%
PRAIRIE VILLAGE	$88,635	$261,500	$1,692	$1,116	19%	38%
ROELAND PARK	$70,514	$164,100	$1,363	$901	17%	36%
SHAWNEE	$84,507	$225,900	$1,706	$795	14%	50%
SPRING HILL	$72,384	$188,800	*	$634	22%	52%
WESTWOOD	$82,500	$238,000	$1,648	$1,323	20%	28%
WESTWOOD HILLS	$132,500	$395,500	$2,316	$1,750	20%	25%
JOHNSON COUNTY	$86,746	$277,300	$1,802	$884	17%	41%

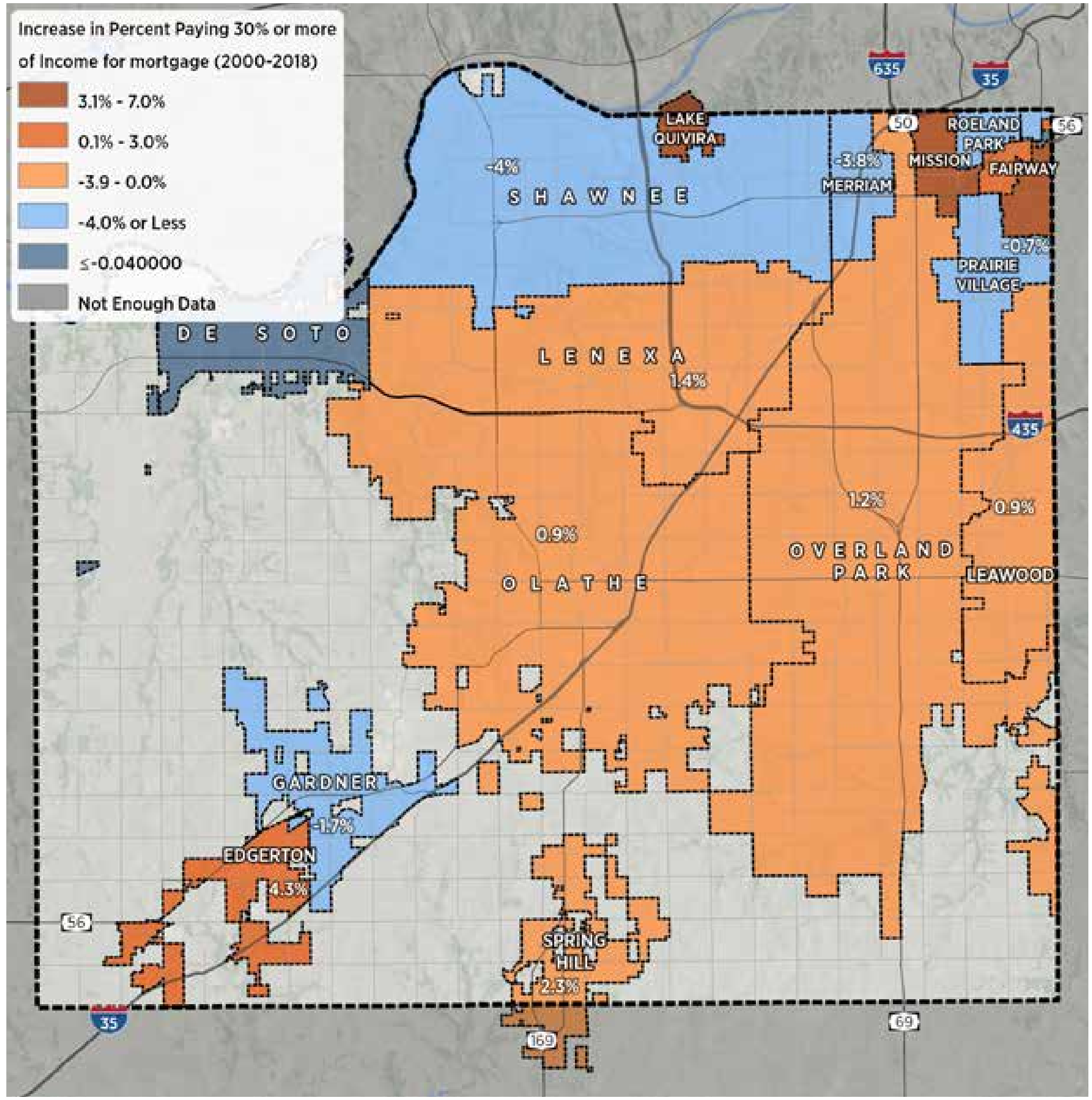
Source: U.S. Census; American Community Survey (2018 5-year Estimates)
*Has a too small of sample size and margin of error for the Census to report

COST BURDENED HOUSEHOLDS

A cost-burdened household is defined by HUD as one that spends more than 30% of its income on housing (including utilities, taxes, insurance), either for a mortgage or rent. **Map 1.11** shows the percent increase from 2000 to 2018 of households paying more than 30% of their incomes to owner housing.

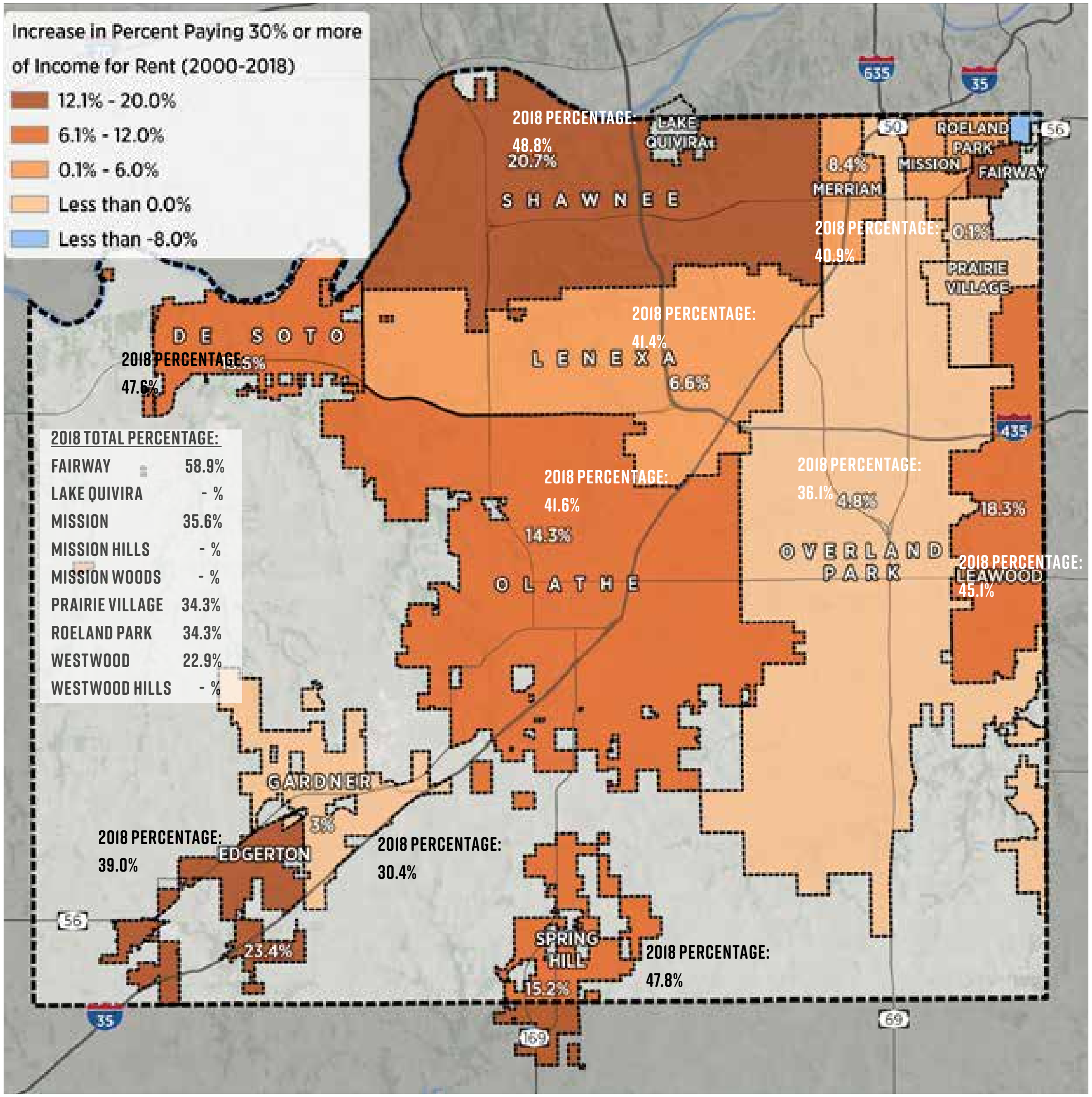
- For homeowners, the cities north of Prairie Village saw the greatest percent rise in cost-burdened residents than the rest of the county. The cities on the northern border of Johnson County experienced a decline in cost-burdened households.
  - › The decrease in number of owner-occupied households that are cost-burdened likely reflects both the change in lending practices following the 2008 housing crash and the recovery from the recession.
    - » Lending practices following 2008 became more strict for at-risk borrowers - those more likely to default on a loan. This means the amount a household can borrow better aligns with its income level, and thus, has fewer chances of being cost-burdened.
  - › Several cities in northeast Johnson County show a cost burden but have higher household median age. This could mean more retirees with low incomes but paid off homes. Thus, cost burden is not as significant.

MAP 1.11: PERCENT CHANGE OF OWNER-OCCUPIED COST BURDENED HOUSEHOLDS (2000-2018)



Source: U.S. Census; American Community Survey (2018 5-year Estimates)

MAP 1.12: PERCENT CHANGE OF RENTER-OCCUPIED COST BURDENED HOUSEHOLDS (2000-2018)



Source: U.S. Census; American Community Survey (2018 5-year Estimates)

Map 1.12 shows the percent increase by city from 2000 to 2010 of households paying more than 30% of their incomes to rent housing.

- For renters, the increase in cost-burdened households is much more pronounced than it is for homeowners. No city saw a decline in cost-burdened households and many cities increases around 20%. The increases are partially attributed to rent prices rising faster than incomes in many areas.
- Interestingly, the cities with a decline in homeowner cost-burdened households are the same cities that experience a rise in renter cost-burdened households. It is not immediately clear why, but it could be from the lack of additional rental supply in recent years.

"As a single mother of twins, with a college degree, and 12 years as an elementary school teacher... I have rented in Prairie Village for the past 7 years because I cannot afford to purchase a home in the area... I do not qualify for any loan assistance."

- Survey Respondent

SUBSIDIZED HOUSING

The Low Income Housing Tax Credit (LIHTC) program is often an important source of attainable workforce housing, offering housing options to households earning less than 80% of Area Median Income (AMI). Units in this program are not required to remain permanently attainable. The incentives usually end after 15 years, but in the 1990s, this was extended to 30 years with an option to leave after 15 years.

Since its inception in 1987, the Low Income Housing Tax Credit (LIHTC) has provided funding for 65 housing projects with 6,990 affordable housing units in Johnson County. These projects include developments that are all affordable units and projects with a mix of affordable and market rate units. Projects were primarily new construction; however, several involved acquisition and rehab of existing buildings.

In just the first three years, the program produced 666 affordable housing units in Johnson County. In the 1990s, 29 LIHTC projects were completed in the county, accounting for 2,277 units. However, since 2000, 24 projects have been placed in service with only 731 units. Many other programs have experienced less support over the years. Recent changes to the federal tax code have made the sale of LIHTC less lucrative and therefore, there have been fewer projects. Johnson County has clearly experienced a decline in the development of these projects as 2017 was the last year a LIHTC project was completed. It is difficult to predict whether property owners will maintain affordable rents once the requirement has expired, but the loss of hundreds of units would further strain the market for affordable or attainable housing.

WAGES

Figure 1.17 illustrates housing affordability based on average salaries for professions making 30%, 50%, 80%, and 100% area median income (AMI). While housing market information is pulled from the Paycheck to Paycheck database and is based on the Kansas City metro area, it provides a good summary of affordability in Johnson County. For a bank teller, making about 30% AMI, they could afford at most a 1-bedroom apartment. An administrative assistant making 50% AMI could afford up to a 2-bedroom apartment. A food service manager making 80% AMI could afford any rental and is the breaking point for wages that would support purchasing a home.

FIGURE 1.17: OCCUPATION BASED ON % OF ANNUAL MEDIAN INCOME

AMI	Annual Salary
30%	Bank Teller $28,632
50%	Administrative Assistant $44,372
80%	Food Service Manager $69,213
100%	Civil Engineer $82,529
120%	Actuarial $104,095

Source: Based on salary data from the 2017 Paycheck to Paycheck Database for the Kansas City KC-MO region and the 2017 Johnson County median household income

"Housing needs to be able to be afforded by teachers, social workers, police officers, nurses. College grads w/ student loans, car payments can't afford to live in JoCo on any of these salaries."

- Survey Respondent

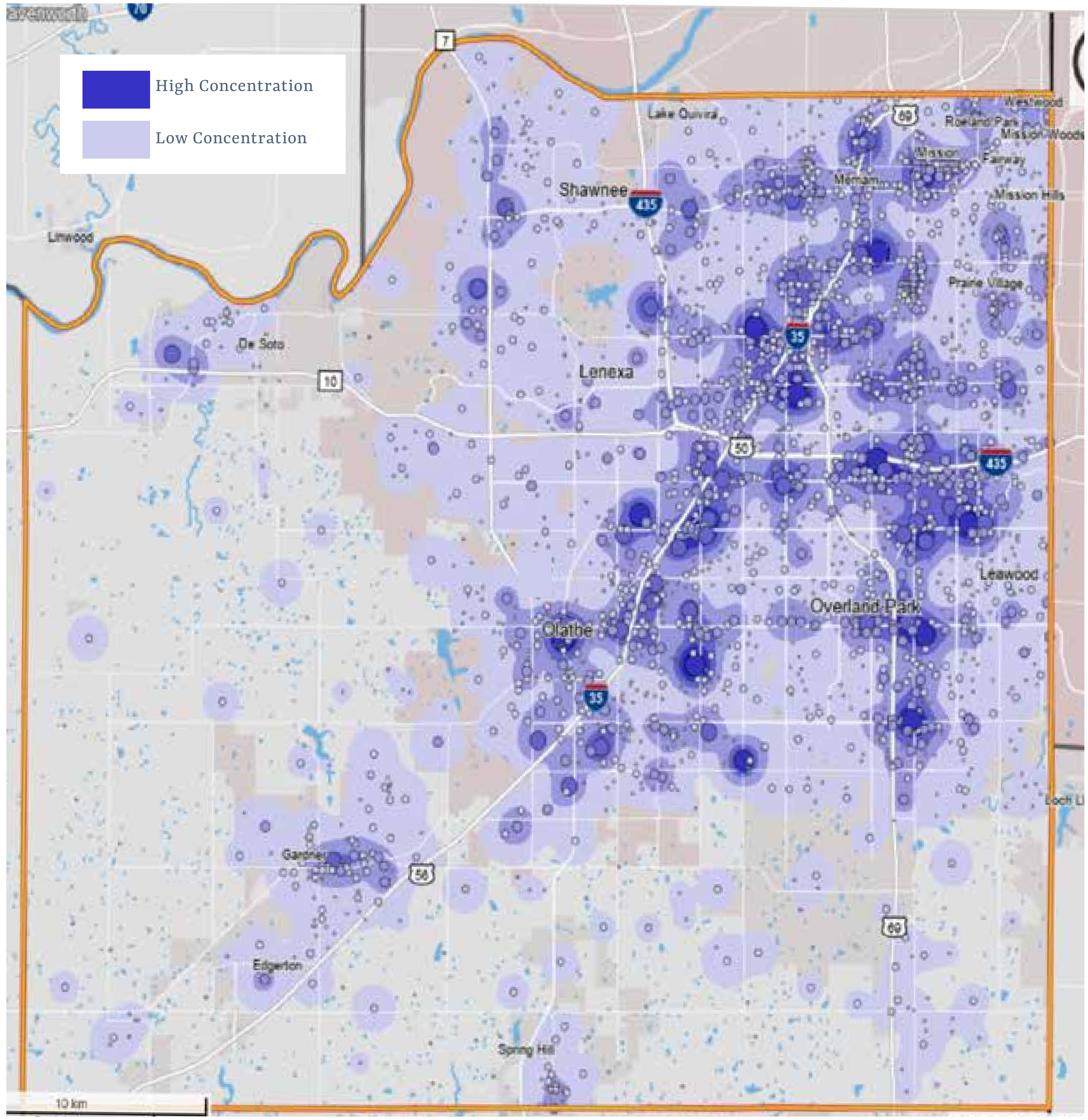
Age matters as well. **Figure 1.18** shows for workers making less than $1,250 per month or less, 48% are under the age of 30. **Map 1.13** shows where many of these income brackets are employed.

FIGURE 1.18: AGE OF WORKER MAKING LESS THAN $1,250/MONTH*

	COUNT	SHARE
AGE 29 OR YOUNGER	22,494	47.5%
AGE 30 TO 54	14,558	30.8%
AGE 55 OR OLDER	10,255	21.7%
SECTOR		
RETAIL TRADE	9,433	19.9%
ACCOMMODATION / FOOD SERVICES	9,289	19.6%
HEALTH CARE/ SOCIAL ASSISTANCE	5,593	11.8%
EDUCATIONAL SERVICES	4,984	10.5%
ALL OTHER	18,008	38.1%

Source: U.S. Census, On the Map 2017
*$1,250 is the lowest income bracket provided by the On the Map application. All worker making this much will be housing cost-burdened if paying for housing.

MAP 1.13: PLACE OF WORK FOR EMPLOYEES MAKING LESS THAN $1,250/MONTH



Source: U.S Census, On the Map 2017

HOUSING ATTAINABILITY AND SUPPLY ANALYSIS

By comparing the distribution of household incomes with housing costs, a picture of supply and demand emerges across all of Johnson County's housing market. **Figure 1.19** examines supply and demand through the lens of what is "affordable" to different income groups to answer the question: is there an adequate supply of housing options available for residents of different income groups?

Figure 1.19 illustrates five major components in pursuit of the above story:

1. **Income Ranges.** The starting point of the analysis is the spectrum of incomes across all residents of Johnson County. From these incomes, corresponding "affordable" housing prices are established for ownership and rental opportunities.

2. **Number of Households in Each Income Range.** The number of households in each income range is the demand; these residents seek housing options in Johnson County that are affordable to them.

3. **Affordability Ranges.** An affordable ownership home is calculated at 2-3 times the household income depending on the income range. Lower income households tend to spend a higher percentage of their income on housing and higher income households tend to spend a lower percentage of their total income on housing. An affordable rental would be about 20% of household income.

4. **Number of Housing Units in Each Affordability Range.** The number of housing units in each affordability range is the supply of affordable options.

    › Composition of Housing Supply. This illustrates the share of the supply met by ownership and renter housing options.

5. **The Balance of Supply and Demand.**

    › If the number of households exceeds the number of units available, those households must seek options in different affordability ranges.

    › If the number of units exceeds the number of households, it indicates that the units are occupied by households in different income ranges.

    › **This analysis is meant to illustrate larger trends in how existing units are being occupied. It does not demonstrate exact market demand in certain price ranges**

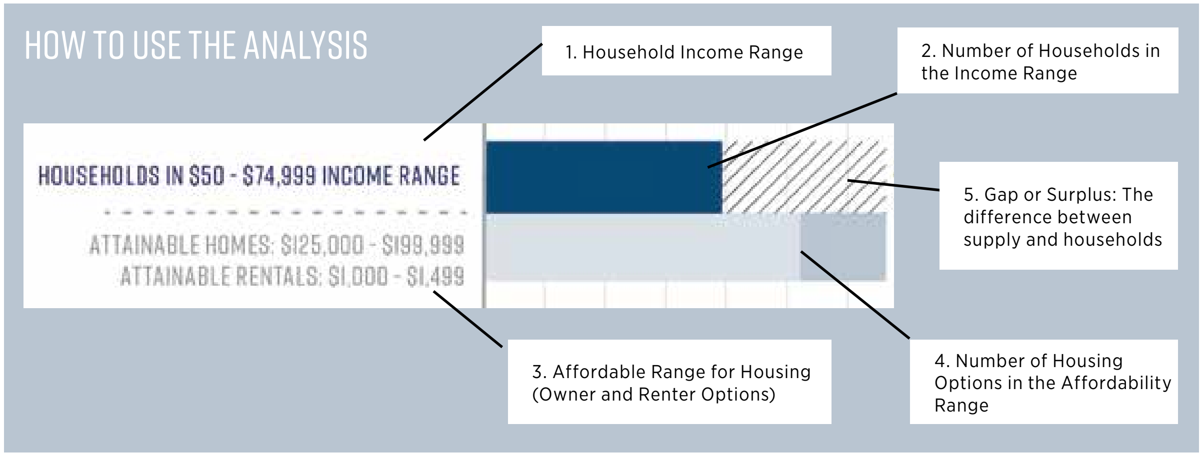
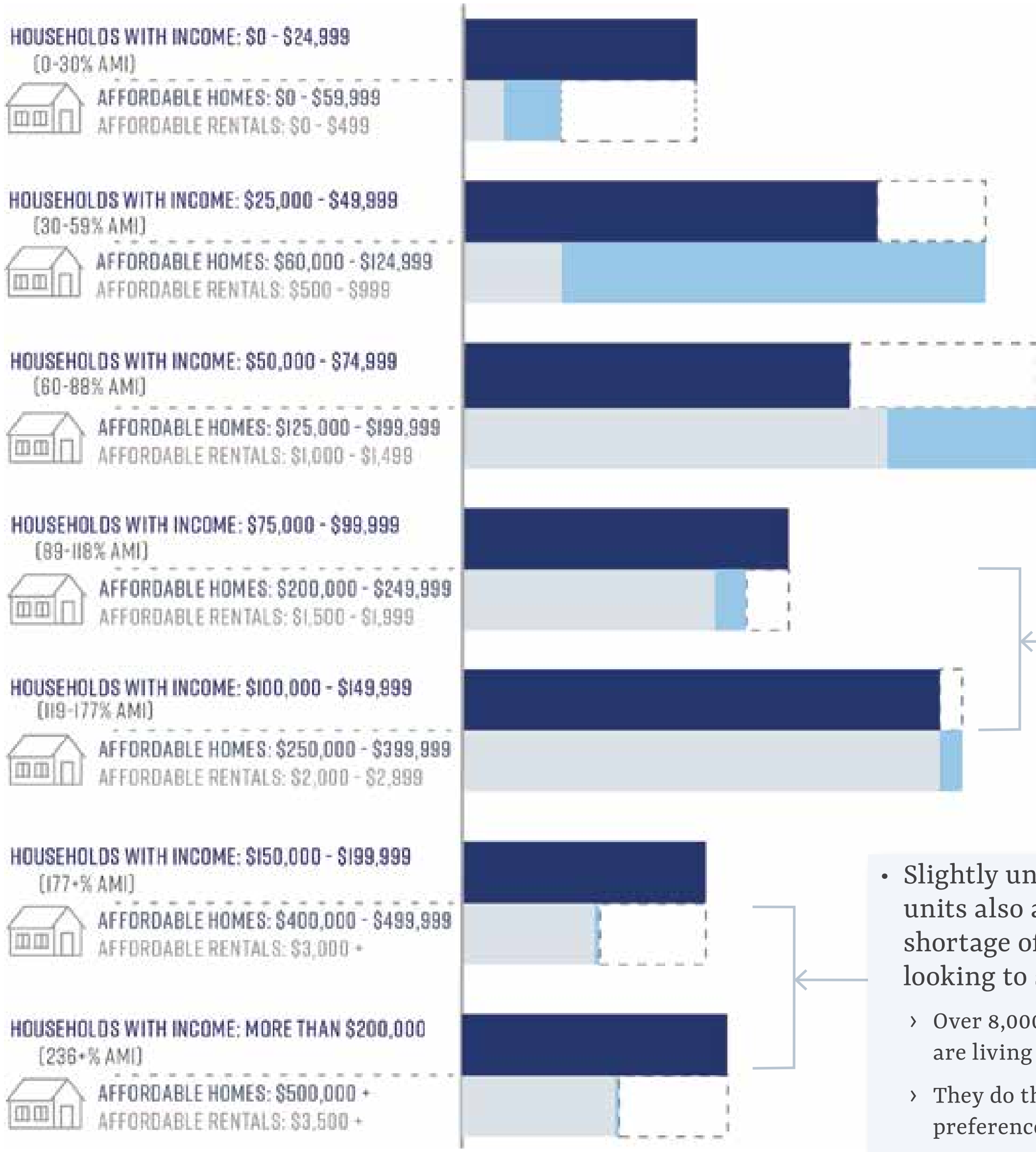


FIGURE I.19: HOUSING ATTAINABILITY



Source: RDG Planning & Design; American Community Survey (2018 5-year Estimates)

- Households making less than $25,000 include some retirees living on fixed incomes with no mortgages remaining and students receiving assistance with housing. For example:
  - 25% of all owner households are over the age of 65.
  - The median household income for households over 65 is estimated at about $61,000, meaning that 50% of those households make less.
  - Additionally, 58% of owner-occupied households over the age of 65 do not have a mortgage.

- While it would appear that there are a good number of units available to households making between $25,000 and $75,000, these units are filled by higher income households and often unavailable to households in this income range.
  - Based on conversations with stakeholders, it is expected that many of the homes in this range see competition from this income bracket and higher income households.

- There is a balance of units attainable for households making between $75,000 and $150,000. However, these households are also competing with a share of households in higher income households for lower cost housing. Builders continues to produce housing for this market and above.

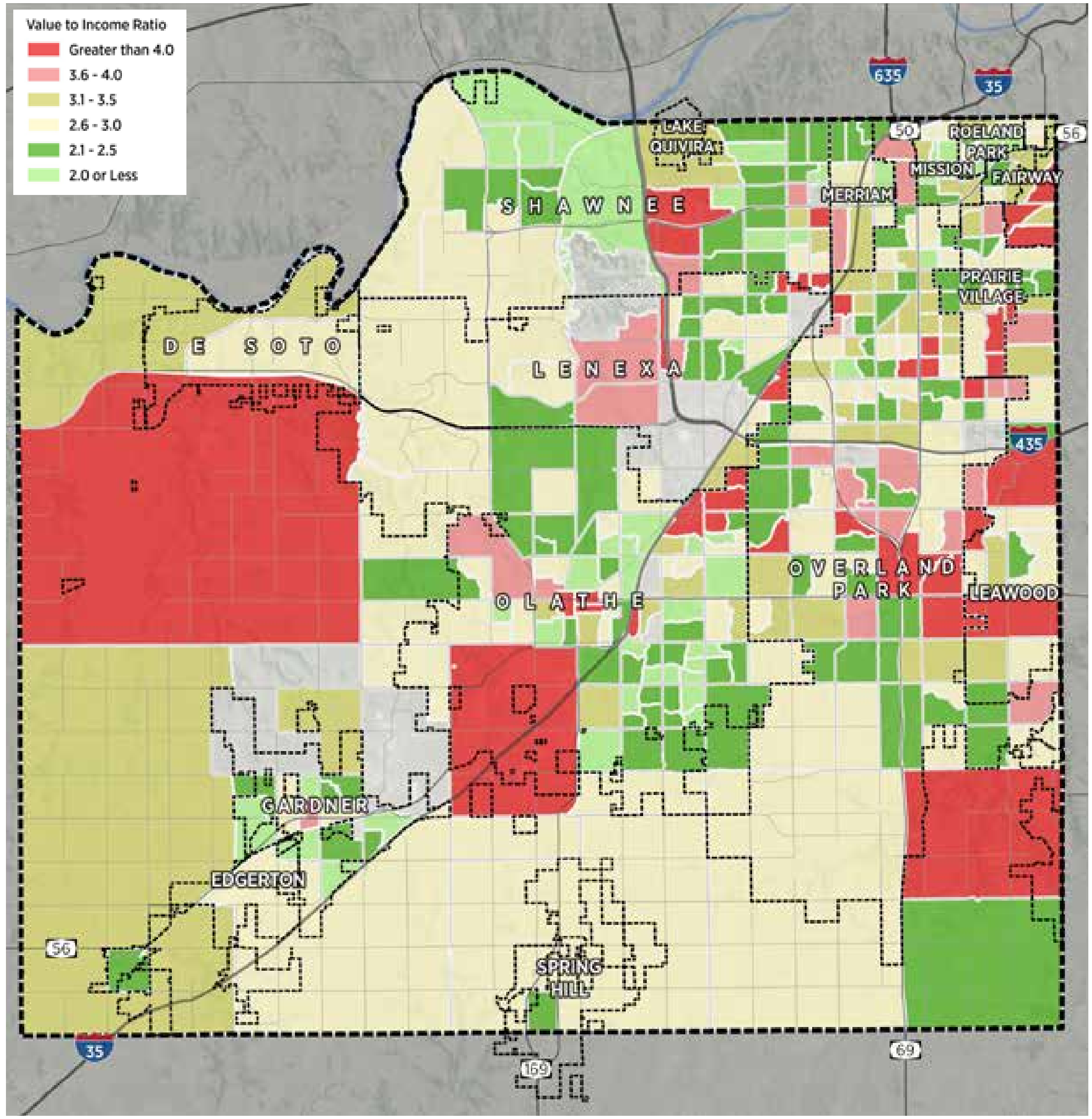
- Slightly under half of the households earning more than $150K fill units also attainable to lower income households, thus creating a shortage of housing units for many first-time home buyers and those looking to step up from their first home.
  - Over 8,000 households making over $100,000 a year (31% of this income bracket) are living in owner-occupied units priced below $250,000.
  - They do this for a variety of reasons, including housing cost and neighborhood preferences but also fewer options at higher prices.
  - Some move-up housing may create a filtering effect, but a greater variety of product types at more moderate rates will likely have a greater impact on the market than attracting households to price points over $300,000.

VALUE TO INCOME RATIO

The next chapter includes a detailed assessment of housing characteristics and affordability within most of Johnson County cities. For most households, an attainable owner-occupied home will be approximately 2.5 times the household's annual income. Housing that costs more than three times or less than two times a household's income indicates market issues.

- Housing costs over three times a household's income results in housing costs that consume over 30% of a household's income, making it more difficult to find attainable housing, assemble adequate down payments, or qualify for financing. See Maps 1.11 and 1.12 for households paying more than 30% of their income towards housing.
- Undervalued housing, that is, median housing values less than two times median household income, is also an issue. Undervalued markets often stagnate new construction driven by appraisals that are below construction costs or profit margins that are not worth the risk to construct new speculative housing.
- The shaded areas on **Map 1.14** are Census boundaries. Large areas of one shade do not indicate these areas have a lot of residential housing. However, the housing units in these areas average a value to income ratio of the shade shown.
  - › For example, the red area in southern Olathe is mostly industrial uses. While the area is a large portion of Olathe's land areas, it is a similar portion of residential units as other Census areas.

MAP 1.14: VALUE TO INCOME RATIO BY CENSUS BLOCK GROUP



Source: American Community Survey (2018 5-year Estimates); RDG Planning & Design

Figure 1.20 shows the value to income ratio by city.

- Many communities have a relatively stable value to income ratio, somewhere between 2 and 3.
- While no communities have undervalued markets, several have ratios well above 3, indicating significant affordability issues (Lake Quivira, Mission Hills, Mission Woods). These are also the communities with the highest cost of housing but are also cities with higher senior populations that may be on fixed incomes with their homes paid off.

FIGURE 1.20: VALUE TO INCOME CHANGE

	VI RATIO 2018	VI RATIO 2010
DE SOTO	3.88	3.55
EDGERTON	2.24	2.07
FAIRWAY	3.35	2.94
GARDNER	2.35	2.51
LAKE QUIVIRA	4.56	3.65
LEAWOOD	2.99	2.95
LENEXA	2.95	2.82
MERRIAM	2.68	3.10
MISSION	2.78	3.42
MISSION HILLS	3.90	3.89
MISSION WOODS	3.98	4.29
OLATHE	2.63	2.57
OVERLAND PARK	3.16	3.11
PRAIRIE VILLAGE	2.95	2.60
ROELAND PARK	2.33	2.70
SHAWNEE	2.67	2.75
SPRING HILLS	2.61	2.38
WESTWOOD	2.88	2.98
WESTWOOD HILLS	2.98	3.68
JOHNSON COUNTY	3.20	2.85

Source: U.S. Census; American Community Survey (2018 5-year Estimates); RDG Planning & Design

CHAPTER TWO
HOUSING PERCEPTIONS

- Public Engagement Overview
- Survey
- Listening Sessions
- UCS Human Services Summit

CHAPTER 2 TAKEAWAYS:

- Residents of Johnson County have many different preferences about housing needs. However, the affordability of housing rose to the top in much of the input gathered. Not just affordability for low income households, but for all age groups and demographics wanting to live in Johnson County.

- People are passionate and engaged in local housing conversations. This housing study process alone garnered:

    - 4,615 total community survey responses
    - 84 participants in 14 total small group listening sessions.
    - More than 170 registrants for the 2020 UCS Human Service Summit focused on housing.

- People living and working in Johnson County want to find solutions to housing challenges. Of the community survey respondents, 549 said that they would be interested in being part of a Johnson County Task Force on implementing housing strategies.

PUBLIC ENGAGEMENT OVERVIEW

The voices of people who live in Johnson County are vital to identifying housing market demand and the status of housing supply, variety, and affordability. The involvement of many stakeholders was a key component to achieve at the beginning of the study. Thousands of voices were captured during the process. The passion of all those involved is invigorating for moving housing forward in Johnson County. This chapter presents a snapshot of those voices and themes.

PREVIOUS INPUT FOR REFERENCE

Leaders in Johnson County have a history of gathering community input. The County regularly administers statistically valid surveys to gauge resident feelings on a variety of topics. A survey completed in the winter of 2020 asked several questions about housing. Those general results are below for reference:

- 45% ranked housing as a "very important" quality of life issue over the next 20 years.
- 10% selected housing as a top priority in the next five years.
- 17% are dissatisfied with the affordability of housing.
- 20% are dissatisfied with the variety of housing (price and type).
- 10% selected types and quality of housing available as their top three reasons for living in Johnson County.
- 64% said that providing safety-net services to low income families is important or very important.

Https://www.jocogov.org/sites/default/files/documents/CMO/Community%20Survey%202020.pdf

ENGAGEMENT SUMMARY:

- Community survey - 4,615 total responses
- Small group listening sessions - 14 total sessions with 84 participants. Groups included:
  - City Planning Commission members
  - City Council Members
  - Realtors and Lenders
  - Builders and Developers
  - Schools and Major Employers
  - Service Providers for low-income, homelessness, and other similar services
  - Chamber Representatives
  - Empty-Nesters and Retirees
- Two meetings with the Health Equity Network Leadership Team
- A meeting with the UCS Board of Directors and Council of Advisors
- UCS Human Service Summit participation with over 170 registrants and the Board of County Commissioners.

COMMUNITY SURVEY

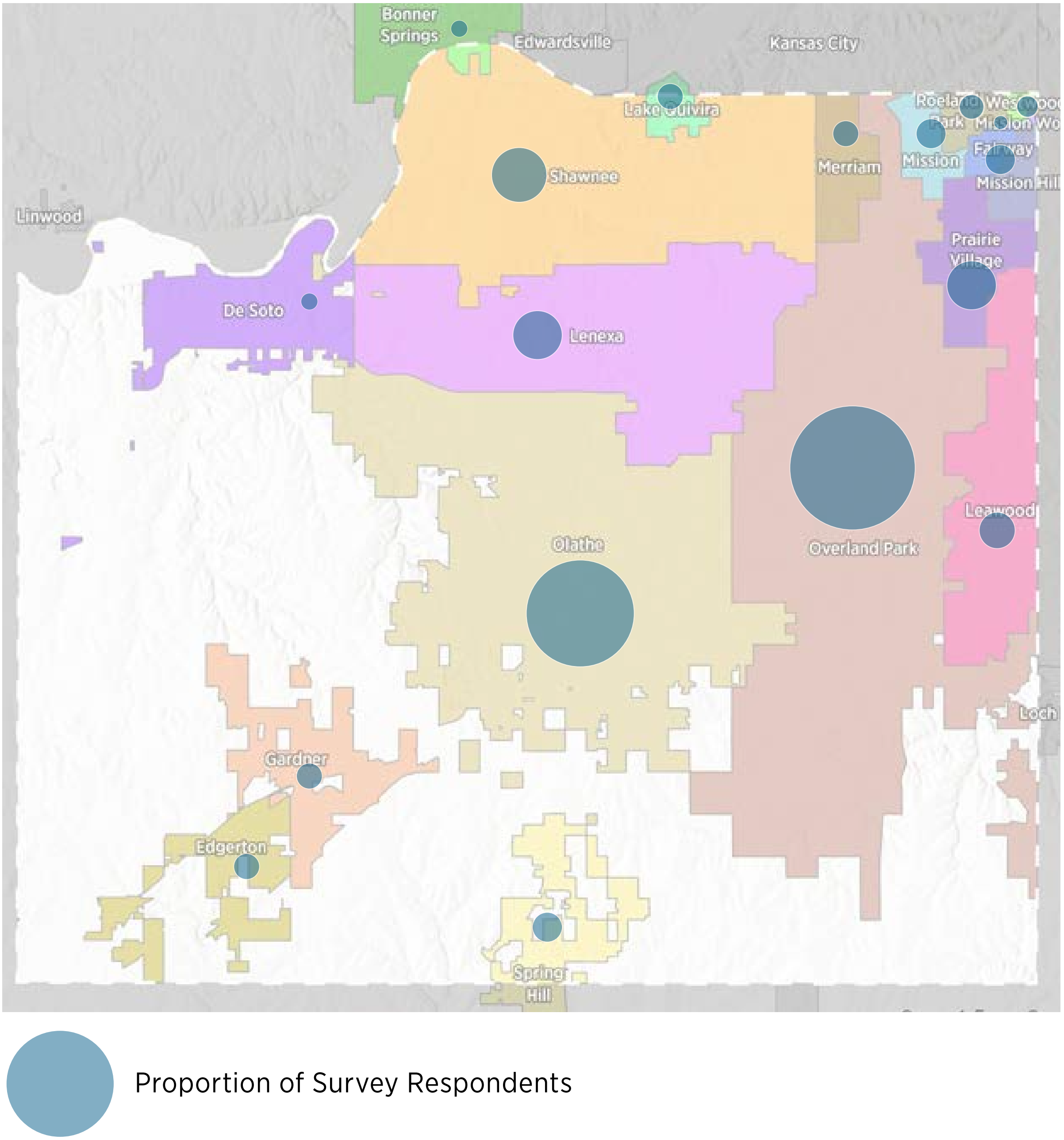
A community survey gathered perceptions and desires from the general population in Johnson County. 4,615 people took the survey with the distribution of respondents in **Figure 2.1**. The survey was advertised via e-mails, social media, local web pages, and through organizations. A Spanish and paper version was also available. While the survey was not administered in a statistically valid method, the sample size is large, although renters are underrepresented. Overall the results help glean insights into housing perceptions and needs.

The following pages illustrate the feelings of survey respondents and essential differences when prevalent. The Appendix includes full results and open-ended comments. There were more than 2,400 open-ended comments.

Respondent Location (Census reported share of county, 2018)

- De Soto: 0.36% (1.08%)
- Edgerton: 1.74% (0.30%)
- Fairway: 3.22% (0.66%)
- Gardner: 2.37% (3.65%)
- Lake Quivira: 2.1% (0.16%)
- Leawood: 4.65% (5.81%)
- Lenexa: 8.98% (9.25%)
- Merriam: 2.46% (1.87%)
- Mission: 3.49% (1.57%)
- Mission Hills: 0.16% (0.60%)
- Mission Woods: 0.04% (0.03%)
- Olathe: 20.69% (23.37%)
- Overland Park: 25.63% (32.22%)
- Prairie Village: 8.09% (3.75%)
- Roeland Park: 2.46% (1.13%)
- Rural Johnson County: 0.69% (2.02%)
- Shawnee: 9.63% (11.02%)
- Spring Hill: 1.32% (1.17%)
- Westwood: 0.58% (0.28%)
- Westwood Hills: 1.25% (0.07%)

FIGURE 2.1: SURVEY RESPONDENT LOCATION



Supply - Availability Perceptions

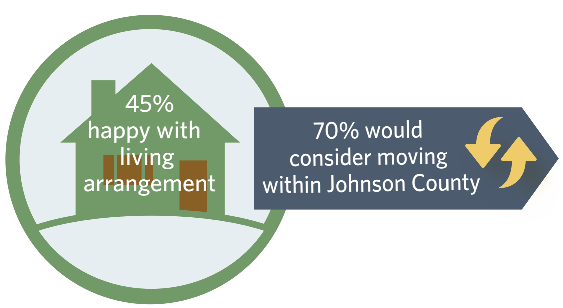
As indicated in the listening sessions and the market data, survey respondents also said that housing is in low supply.

Low paid hourly workers, those needing to be near transit, and those with disabilities are perceived to have the fewest housing options, all fell under 20% of survey respondents (**Figure 2.2**).

Families and working adults are felt to have their housing needs best met, although still between 60%-70% of survey respondents.

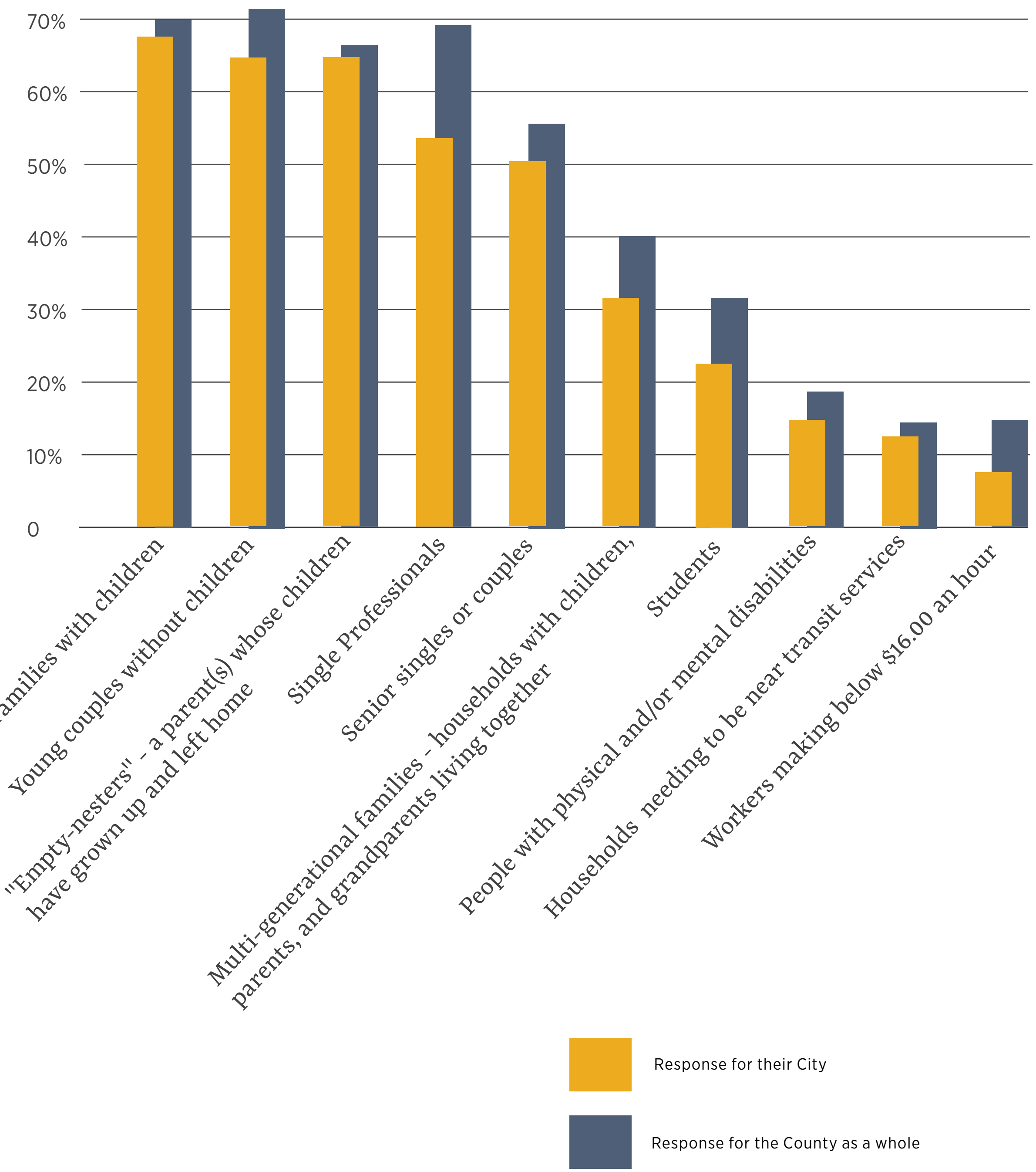
The responses on housing needs are telling because many people would consider moving in the next three years to somewhere else in Johnson County, shown in **Figure 2.3**.

FIGURE 2.3: IS THERE ANY REASON YOU'D LOOK FOR A NEW PLACE TO LIVE IN THE NEXT THREE YEARS?



*Over 100% because respondents could choose multiple answers

FIGURE 2.2: DOES HOUSING ADEQUATELY MEET THESE HOUSEHOLD'S NEEDS?



For those survey respondents that have looked for housing in the last three years, many saw significant differences in the supply of rentals (**Figure 2.5**) and homes (**Figure 2.4**) at different price points.

- Respondents felt a prominent undersupply of any rental priced below $1,000 a month, while a significant oversupply of rental units priced above $1,500 a month.
    - Prices under $500 a month are mostly secluded to low income housing projects and programs.
- The highest balance of rental prices felt by respondents is between $1,000 and $1,499 a month.
- Respondents recognized more of a balance in homes priced above $200,000. Homes at this level are generally market rate new construction.
- Anything under $200,000 was seen as significantly undersupplied. Even a large percentage of undersupply of homes in the $200k's is felt. These homes are occupied by households who are not moving for a variety of different reasons. However, one reason to not move is the lack of housing products people want to move to and the ability to afford another option.

FIGURE 2.4: HOW WOULD YOU RATE THE SUPPLY OF OWNER UNITS IN YOUR CITY?

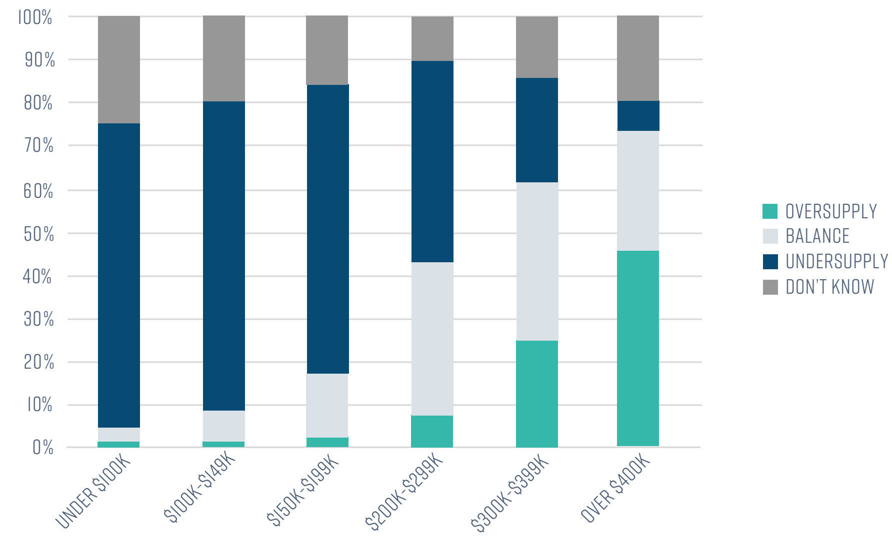
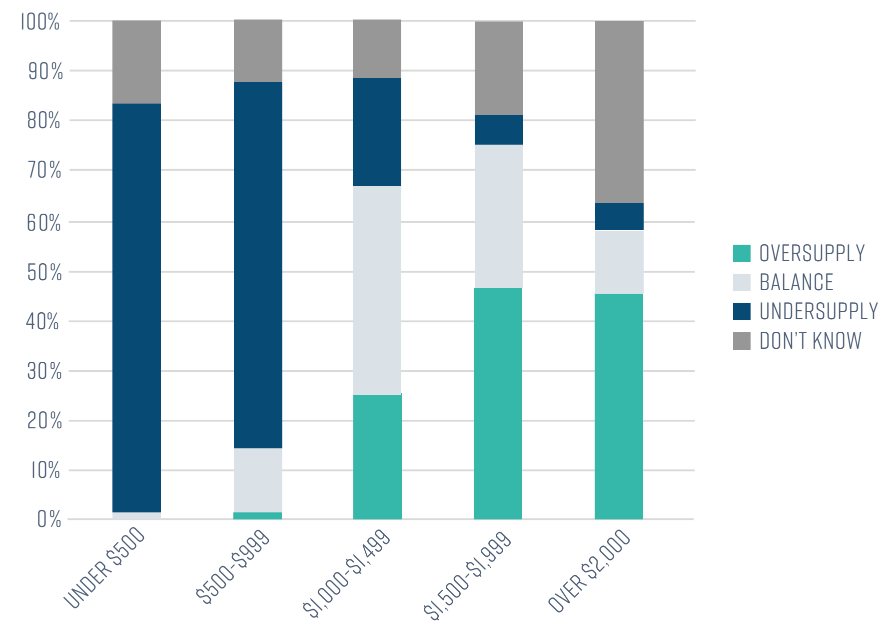


FIGURE 2.5: HOW WOULD YOU RATE THE SUPPLY OF RENTAL UNITS IN YOUR CITY?



Demand - Housing Product Preferences

Survey respondents felt strongly about certain housing products needed in Johnson County. The responses represent the preferences of residents and their experiences in the housing market.

This page's responses show that many people feel that a variety of housing types would be successful in Johnson County. The answers partially indicate the people see the singularity of housing products being built today and want to see other options.

Figure 2.7 shows what respondents felt seniors want. While 78% felt that independent senior living housing would be successful, most overwhelmingly felt that owner-occupied with shared maintenance was the type of housing seniors want.

FIGURE 2.7: WHAT TYPE OF HOUSING DO YOU BELIEVE AREA SENIOR AND ELDERLY ARE MOST INTERESTED IN?

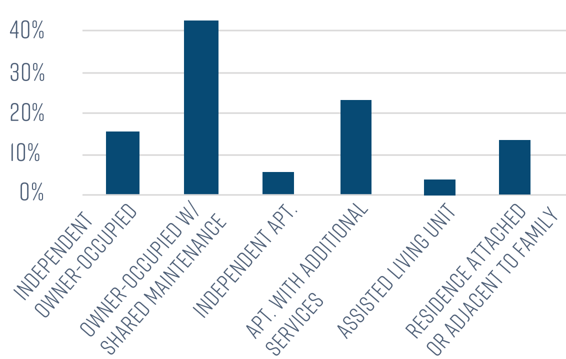


FIGURE 2.6: DO YOU THINK THE FOLLOWING HOUSING PRODUCTS WOULD BE SUCCESSFUL IN YOUR CITY TODAY?

Mid-size, three-bedroom house

Small two- or three-bedroom house

Independent - senior living housing

Townhouse or duplex

Cottage court - A group of smaller homes that share yard space.

Accessory dwelling unit

Row housing

Mixed-income housing near transit stations

Larger home with four or more bedrooms

Downtown upper-story residential

Apartment

Large lot residential housing

Attainability of Housing

The cost of housing was a concern by survey respondents, a primary reason for commissioning this study. The concern was in spite of many survey respondents making incomes above the county median and these respondents appear to live in homes/rentals that cost less than what they could afford.

Figures 2.8 through **2.13** on this page shows the reported costs that respondents pay for housing based on their reported incomes. The shaded area represents what is considered cost-burdened by federal standards.

- The responses generally align with what is expected and market data. Lower income households tend to spend more of their total income on housing. This is especially true for those making below $25,000 a year.
- The responses also illustrate that many household income ranges have similar monthly costs for housing. For example, the $1,000-$1,499 cost range ranks first on housing costs for households making between $50,000 and $150,000. This may mean competition across all these household income categories for similar rentals and homes.

FIGURE 2.8: HOW MUCH IS YOUR MONTHLY RENT OR MORTGAGE PAYMENT? (HOUSEHOLD INCOME UNDER $25,000)

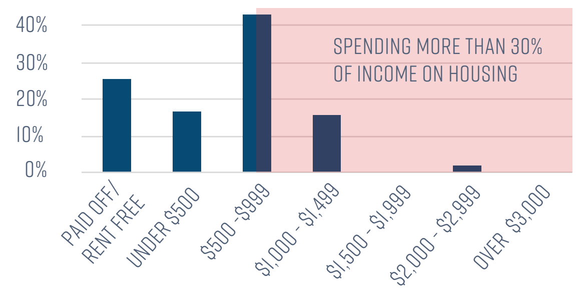


FIGURE 2.9: HOW MUCH IS YOUR MONTHLY RENT OR MORTGAGE PAYMENT? (HOUSEHOLD INCOME $25,000-$50,000)

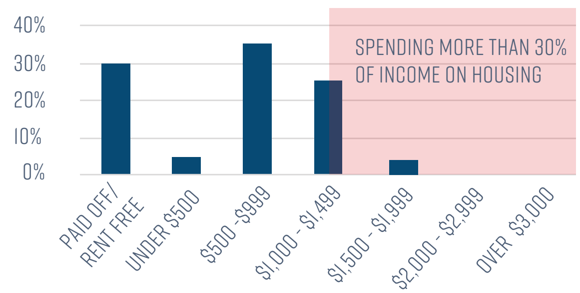


FIGURE 2.10: HOW MUCH IS YOUR MONTHLY RENT OR MORTGAGE PAYMENT? (HOUSEHOLD INCOME $50,000-$75,000)

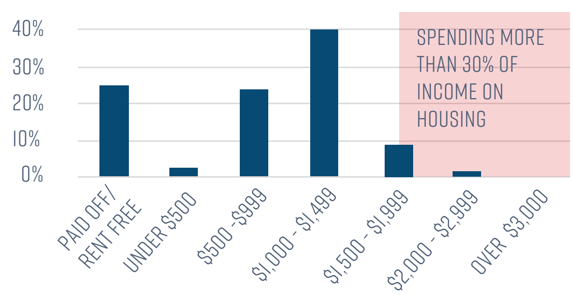


FIGURE 2.11: HOW MUCH IS YOUR MONTHLY RENT OR MORTGAGE PAYMENT? (HOUSEHOLD INCOME $75,000-$100,000)

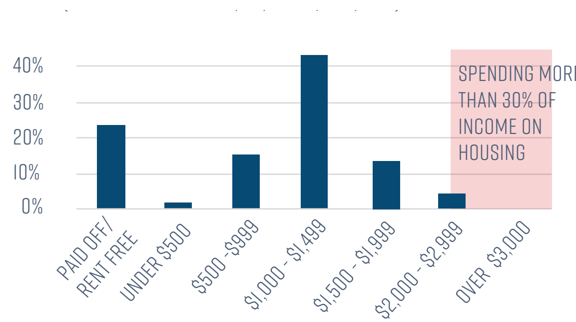


FIGURE 2.12: HOW MUCH IS YOUR MONTHLY RENT OR MORTGAGE PAYMENT? (HOUSEHOLD INCOME $100,000-$150,000)

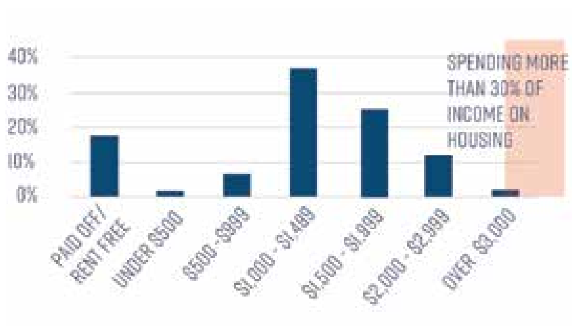
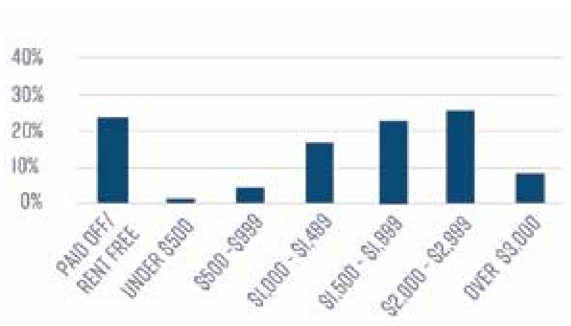


FIGURE 2.13: HOW MUCH IS YOUR MONTHLY RENT OR MORTGAGE PAYMENT? (HOUSEHOLD INCOME $150,000+)



Solutions

As for solutions to reduce the cost of housing in Johnson County, respondents supported a mix of direct resident assistance and housing supply oriented assistance. **Figure 2.16** shows the types of programs with potentially the most support.

Respondents had mixed feelings about increasing local funding to remove poor condition housing (**Figure 2.14**). Support for rehabilitation funding was higher (**Figure 2.15**). Note, these responses represent the entire county. However, rehabilitation and blighted properties are not as prevalent in many cities.

FIGURE 2.14: DOES YOUR CITY NEED INCREASED OR CONTINUED USE OF CITY/PUBLIC FUNDING TO REMOVE DILAPIDATED HOUSING?

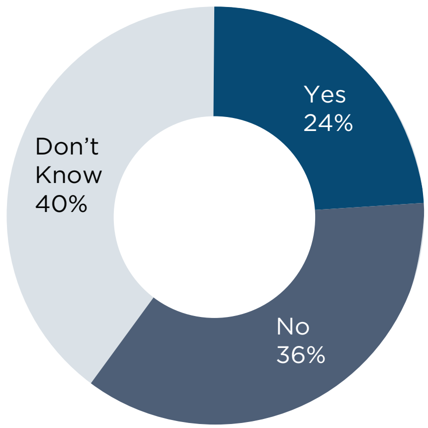


FIGURE 2.15: DOES YOUR CITY NEED INCREASED OR CONTINUED USE OF CITY/PUBLIC FUNDING FOR HOUSING REHABILITATION OR RENOVATIONS?

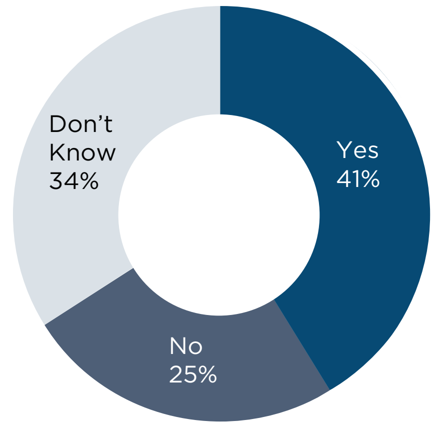
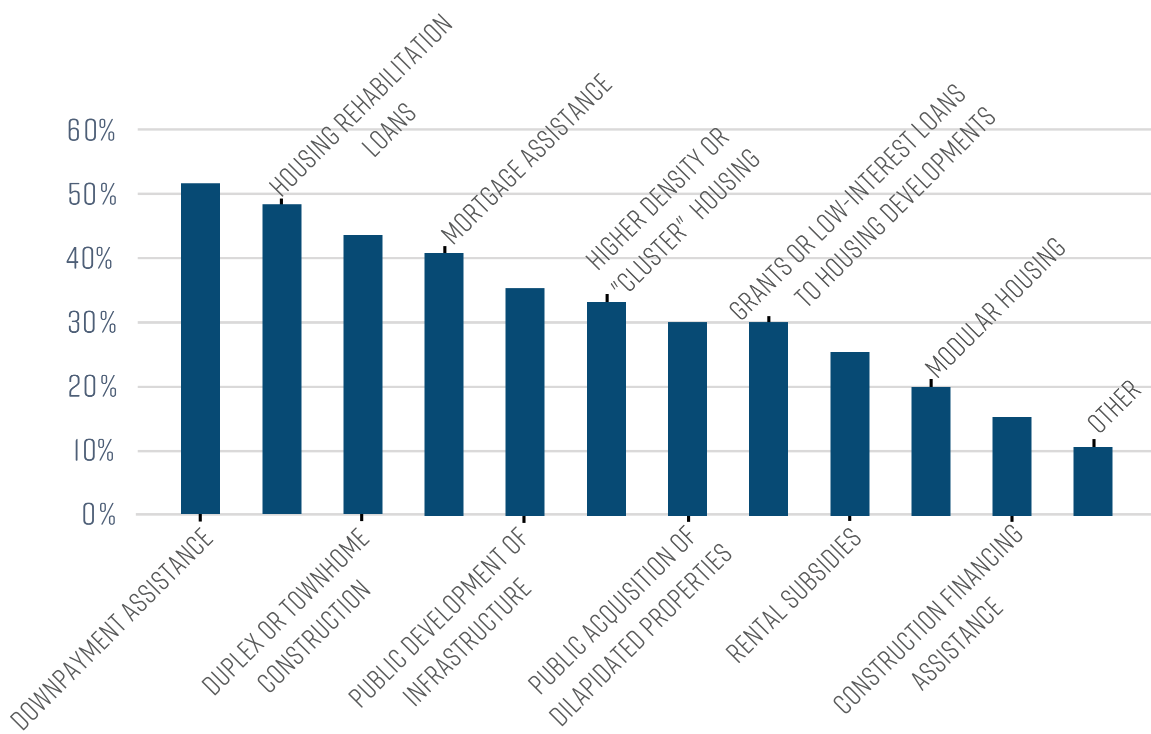
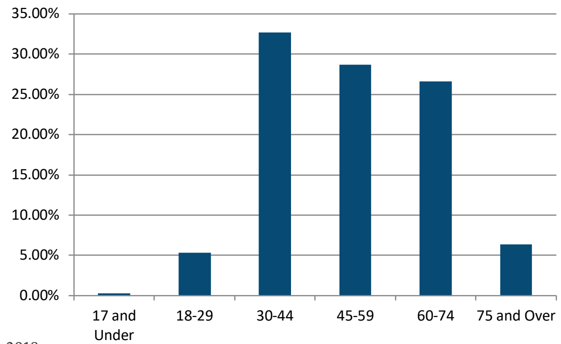


FIGURE 2.16: WHICH TYPES OF HOUSING SOLUTIONS WOULD YOU SUPPORT TO REDUCE THE COST OF HOUSING IN JOHNSON COUNTY (SELECT ALL THAT APPLY)?



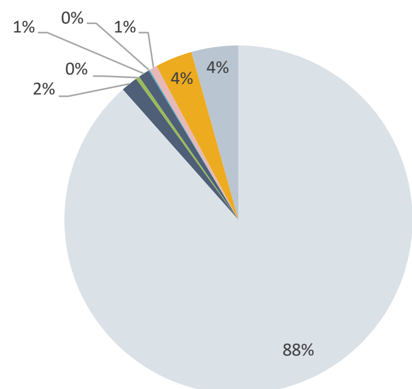
Survey Demographics

FIGURE 2.17: WHAT IS YOUR AGE



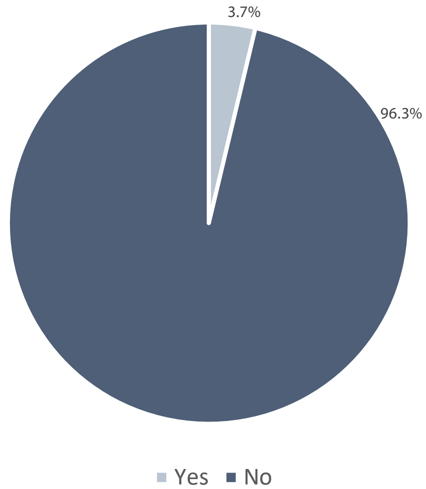
2018 Census Reported	24.9%	14.4%	21.1%	20%	13.9%	5.5%

FIGURE 2.18: WHAT IS YOUR RACE



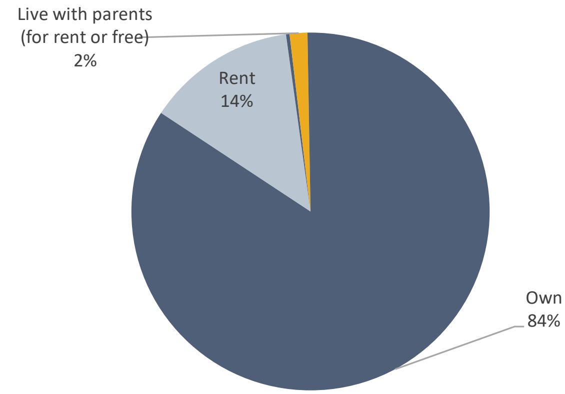
	2018 Census Reported
White alone	86.3%
Black or African American alone	4.7%
American Indian and Alaska Native alone	0.3%
Asian alone	4.9%
Native Hawaiian and Other Pacific Islander	0.0%
Some other race alone	0.9%
Two or more races	2.9%
Prefer not to say	

FIGURE 2.19: ARE YOU HISPANIC OR LATINO



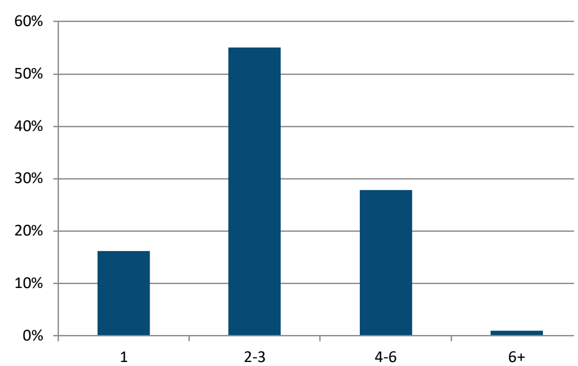
2018 Census Reported 7.5% 92.5%

FIGURE 2.21: DO YOU OWN OR RENT YOUR HOME



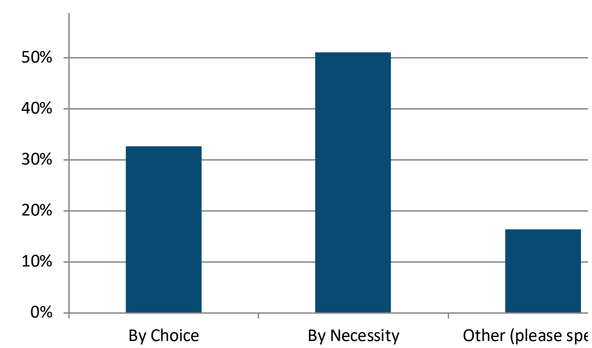
2018 Census Reported Own: 69.1% Rent: 30.9%

FIGURE 2.20: HOW MANY PEOPLE LIVE IN YOUR HOUSEHOLD



2018 Census Reported	25.9%	50.6%	23.5%

FIGURE 2.22: IS THERE A REASON YOU OPT TO RENT YOUR HOME?



LISTENING SESSIONS

A series of listening sessions were held in August of 2020. These sessions were to be in the spring of 2020, but the COVID-19 pandemic changed the ability to meet in person. However, participation and input in a virtual format remained robust from many different demographic groups across the county. Several one-on-one discussions were also held with stakeholders in the process.

Figure 2.23 shows the groups participating in discussions. The opportunity and challenge themes in Chapter 7 reflect the conversations. In general, the conversations with stakeholders match the quantifiable data in the Census, MLS listings, and local data. However, a few other themes from the conversations are not as easily shown in quantifiable data:

1. **The high amount of public opposition to housing projects in nearly every city.** Stories of projects getting denied by Councils even though the project met code standards were mentioned in nearly every session. Opposition is not necessarily geared toward one product - apartments, attached, low-income, and other mixed-use arrangements have all faced opposition. Several reasons are cited by the public in opposition, although not based on provided facts or evidence:
    - Suggestions of traffic congestion.
    - Accusations of the project increasing property taxes.
    - Claims of detriment to neighborhood character.

FIGURE 2.23: LISTENING SESSION PARTICIPANTS

GROUP	DATE	ATTENDANCE
EMPTY-NESTERS AND RETIREES	AUGUST 19, 2020	5
COUNCIL AND PLANNING COMMISSION (DE SOTO, EDGERTON, GARDNER, SPRING HILL)	AUGUST 19, 2020	5
BUILDERS AND DEVELOPERS	AUGUST 20, 2020	4
SERVICE PROVIDERS, NON-PROFITS	AUGUST 20, 2020	3
REALTORS AND LENDERS	AUGUST 20, 2020	6
COUNCIL AND PLANNING COMMISSION (SHAWNEE, LENEXA, MERRIAM, MISSION)	AUGUST 20, 2020	8
EMPLOYERS AND CHAMBERS	AUGUST 21, 2020	6
LANDLORDS	AUGUST 25, 2020	3
SCHOOL DISTRICTS	AUGUST 25, 2020	6
REALTORS AND LENDERS	AUGUST 25, 2020	6
COUNCIL AND PLANNING COMMISSION (FAIRWAY, ROELAND PARK, MISSION HILLS, MISSION WOODS, WESTWOOD, WESTWOOD HILLS)	AUGUST 25, 2020	7
SERVICE PROVIDERS	AUGUST 26, 2020	13
BUILDERS AND DEVELOPERS	AUGUST 26, 2020	3
COUNCIL AND PLANNING COMMISSION (OLATHE, OVERLAND PARK, PRAIRIE VILLAGE, LEAWOOD, JOHNSON COUNTY BOARD OF COMMISSIONER)	AUGUST 26, 2020	9

2. **The number and types of services households need continues to increase.**
    - Examples include food pantries, transitional housing, rent assistance, childcare, and other necessities.
3. **Costs like infrastructure requirements and design standards are a factor that drives up housing costs.** Each city regulates items differently and are not consistent in what gets approved and denied.
4. **The conflict between investors and homeowners tearing down houses and rebuilding with a much larger footprint.** For the city, this increases stormwater runoff, eliminates a lower price housing option, and starts to diminish older neighborhood character.
    - Mostly prevalent in Prairie Village, Fairway, Mission Hills, Leawood, and Westwood.

UCS HUMAN SERVICE SUMMIT

The annual UCS Human Service Summit organized by United Community Services continued in 2020, even with the pandemic. The all virtual Summit was held the morning of August 26th and included small breakout sessions, interactive Q&A, and participant polls. More than 170 people registered.

The 2020 Summit focused on housing, with an early look at this housing study. The event also was an opportunity to introduce the next phase of the effort to address safe, stable, and attainable housing needs through the multi-sector Task Force.

The panel included a discussion on housing, moderated by Steve Kraske, host of KCUR's Up to Date. Panelists included:

- Mayor Eric Mikkelson, City of Prairie Village
- Qiana Thomason, President/CEO, Health Forward Foundation
- Dennis Strait, AIA, ASLA, NCARB, LEED AP - Principal at Gould Evans
- Maria Zuluaga, The Zuluaga Real Estate Group
- Will Ruder, Executive Vice President, Homebuilders Association of Greater Kansas City

Attendees participated in breakout listening sessions, discussing who they are most concerned about when it comes to finding stable, attainable housing in Johnson County. The listening session discussions are used as a component of the research for this study.

FIGURE 2.24: 2020 UCS HUMAN SERVICE SUMMIT AGENDA

UCS

1

2020 Human Service Summit

. . . Build Our Housing Future

AGENDA

August 26, 2020

Welcome & Introductions

Julie Brewer, Executive Director, United Community Services of Johnson County

Build Our Housing Future - What the Data Telling Us

Presenters: *Amy A. Haase, AICP, Principal-In-Charge, RDG Planning & Design*
Charlie Cowell, AICP, Project Manager, RDG Planning & Design

Audience Interaction: Interactive Polls, Q&A, and Breakout Room Sessions are a part of the presentation. We look forward to your participation.

BREAK—FOR ALL VIRTUAL ATTENDEES

Build Our Housing Future - Panel Discussion

Moderator: *Steve Kraske, KCUR*

Panelists: *Mayor Eric Mikkelson, City of Prairie Village*
Qiana Thomason, President/CEO, Health Forward Foundation
Dennis Strait, AIA, ASLA, NCARB, LEED AP - Principal at Gould Evans
Maria Zuluaga, The Zuluaga Real Estate Group
Will Ruder, Executive Vice President, Homebuilders Association of Greater Kansas City

Audience Interaction: Q&A

Turning Data to Action - Housing Task Force Overview

Presenter: *Sheila Shockey, Principal-In-Charge, Shockey Consulting*

BREAK—FOR ALL VIRTUAL ATTENDEES

We Want to Hear From You - *(Attendees will be moved to virtual breakout rooms for a housing study listening session)*

Facilitators: Johnson County Health Equity Network Leadership, Housing Study Technical Committee, UCS Board

Closing & How you Can Stay Involved: *Julie Brewer & Sheila Shockey*

Virtual Event Scheduled: 8:30 a.m.-12:30 p.m.

CHAPTER THREE
DEVELOPMENT POTENTIAL

CHAPTER 3 TAKEAWAYS:

- **Each city in Johnson County faces a different set of local and county-wide factors that influence housing.** Thus, a city cannot address all solutions by itself. Some solutions will be unique to a city and its needs and other solutions will need to be a coordinated effort.
- **The strict cost of a mortgage, property taxes, insurance, or rent are not the only costs a household faces.** Transportation, childcare, and property maintenance costs are two other major expenses for Johnson County residents. Therefore, a way to make housing more attainable also includes reducing other expenses.
    - » Increasing access to transportation options other than single passenger cars gives opportunities for households to spend less on mobility. For some households, these options are a necessity. Examples include public transportation, sponsored ride sharing programs, bicycles, electric bicycles, and other small motorized transportation.
- **There is a large amount of land in Johnson County that is undeveloped along major transportation routes.** These are opportunities to increase density and bring public transportation to more areas.
- **Many areas of Johnson County are also older and have increased needs for regular property maintenance.** This is a heavy expense for some households. These are areas to conserve and ensure homeowners have the funds to upkeep the homes.
- **There are opportunities for infill and transitions of commercial uses to housing throughout the county.** These areas tend to be close to jobs and transit options.

INTRODUCTION

All development does not have the same effect on housing challenges in Johnson County. While an increase in dwelling units does increase housing supply overall, it does not increase the attainable housing supply for all people. The information in this chapter reflects on the demographic data, population projections, and community tours to show ways to prioritize housing strategies in the county to benefit those most in need. The recommendations lead into specific community issues, opportunities, and strategic directions in sections 2 and 3.

WHY LOCATION OF HOUSING MATTERS

With unlimited resources and options, people will most often choose to live in areas close to recreation, work, and services. This is a predictable model as less time traveling to destinations means more time for leisure or productivity. However, each household must balance and prioritize what is most important for them and those they care for. Several factors influence a household's choice and ability of where to live, generally decided by family status and income level.

Young Person or Couple, no kids.
Medium to High Income

- Type: All types of homes are feasible.
- Desires: Close to work, recreation, or urban centers.
- Needs: Transportation.

Young Person or Couple, no kids.
Low to Medium Income

- Type: May be limited to rentals. Luxury homes/condos and areas of high valuation out of reach for ownership
- Desires: Close to work, recreation, or urban centers.
- Needs: Transportation.

Working families
Medium to High Income

- Type: 2+ bedrooms; owner or rental.
- Desires: Close to schools, work, and youth recreation.
- Needs: Transportation, day care

Working families
Low to Medium Income

- Type: 2+ bedrooms; rental more attainable.
- Desires: Close to schools, work, and youth recreation.
- Needs: Transportation, day care.

Empty Nesters
Medium to High Income

- Type: All types of homes are feasible; single story maybe preferred.
- Desires: Close to work, recreation, perhaps lower maintenance
- Needs: Transportation.

Empty Nesters
Low to Medium Income

- Type: May be restricted to stay in their current home, or move to rental, single story maybe preferred.
- Desires: Close to work, recreation, perhaps lower maintenance
- Needs: Transportation.

Retirees
Medium to High Savings

- Type: Universal design to assisted living complexes
- Desires: Close to parks, walking, food and medical services
- Needs: Transportation, low or no maintenance

Retirees
Low to Medium Savings

- Type: Universal design to assisted living complexes, May be restricted to stay in their current home or move outside of Johnson County
- Desires: Close to parks, walking, food and medical services
- Needs: Transportation, low or no maintenance

As this illustrates, those households with lower incomes and savings are much more restricted on housing choice. Often decisions where to live must focus more on cost than proximity to work, child services, or recreational areas. More time traveling to destinations means:

- Less time for leisure and exercise.
  - Result – lower health status and more expense on healthcare, both for the individual and county facilities.
- Higher transportation costs through fuel, vehicle maintenance, tolls, or transit fees.
  - Result – Even less money to devote to housing, savings, and other quality of life benefits. This taxes the county in the long run by adding congestion, more social assistance programs, and long-term healthcare costs.
- Lower workplace productivity from travel stress, long days, and financial insecurity.
  - Result – The household's income earner may be more susceptible to losing their job or less opportunity for advancement. Companies are not stimulated to increase wages when not seeing productivity increases.

Because of all these factors, location and quality of attainable housing are just as important as increasing the overall housing supply in Johnson County. A series of housing program strategies should target certain geographies as well as the assistance provided.

> "JoCo does not have adequate public transportation, once that infrastructure can be improved upon then developments to house the workforce that uses that transportation should be supported."
>
> **- Survey Respondent**

CRITERIA FOR PRIORITY STRATEGY AREAS

Criteria for attainable housing locations can and should be tailored for each city. Section 2 of this plan provides more data and housing demand by price point for each city.

The following criteria and accompanying maps give a general understanding of opportunity locations to focus on public policy. The criteria are not all inclusive. Each community will need to determine other applicable situations for each location to determine its feasibility. For example, current property ownership and unknown site constraints like easements that were not readily available for this study.

More reference information and data for consideration are provided by the Mid-America Regional Council (MARC) through their Connected KC 2050 map: https://connectedkc.org/plan-documents/

The criteria for evaluation of the maps in this chapter include:

- **Transit Lines and Stops.** For a low-income family, one vehicle may be the only option. Therefore, accessible transit is an essential service to their livelihood. Transit can be cheaper than owning a vehicle and allow a person to do other activities on their commute. Depending on the destination and time of day, transit may not be faster than traveling by personal vehicle. However, it provides an opportunity to increase savings and reduce stress for a worker.
    - Application – Housing options up to a half-mile around the location of transit lines and current stopping locations are most beneficial. There is a high disincentive for people to travel much further to a stop because of the added walking/bicycling time and physical ability of the user.
- **Schools.** For households with children, getting kids safely to school is a large time commitment each day. Being closer to schools gives kids the ability to walk or parents more flexibility in their day to travel to and from work.
    - Application – Schools located near transit stops or housing opportunities within a half-mile of schools have the most benefit for households with children.
- **Shopping Centers.** Areas with clusters of shopping centers provide a variety of services and grocery needed by all households. However, typical wage levels for retail and service industries are also a contributing factor to lower household incomes.
    - Application – Shopping centers with transit stops are essential destinations for those using transit. First, shopping centers with transit stops are opportunities for nearby housing opportunities. Second, shopping centers without transit stops or lines should be evaluated for the feasibility of new transit stops.
- **Future Land Use.** Each municipality has plans for community growth. Understanding the effort that went into these plans, areas identified as a residential or mixed use future land uses are a priority.
    - Application – Incorporating existing future land use plans with the other criteria in this section shows where existing policies want residential uses. The criterion also helps inform recommendations for potential sites to rezone or zoning districts amendments under certain future land use designations to allow housing variety and mixed-uses.

- **Housing Conditions.** Equally important as home value is housing condition. Understandably, there is a positive correlation between housing conditions and housing value. However, more attainable units with poor conditions do not provide a stable housing option for certain households. Lower condition homes are more susceptible to repair expenses, maintenance costs, and safety concerns. In the long run, these types of units may create more stress and financial burden for a household.
    - › Application – Areas with dwellings below fair condition that are otherwise favorable to many other criteria are potential candidate areas for targeted rehabilitation and stabilization programs. For the lowest condition areas, there may be an opportunity for complete redevelopment to new housing variety or mixed-use.
- **Environmental Features.** Environmental features prevent development in some instances, most notably flood prone areas. Other considerations include preserves and steep slopes.
    - › Application – Areas of prohibitive environmental features are excluded as development potential areas.
- **Vacant Land.** Land that is not already developed and otherwise free of environmental and man-made constraints are first targets for development potential. Each municipality will have to consider each area separately to understand development feasibility given current property ownership, infrastructure plans, and public services.
    - › Vacant land that falls under several other criteria is a potential high priority to target for housing policy, programs, and development agreements.
- **Existing Policies.** Many municipalities already have programs and policies that target attainable housing. The criteria in this plan are not meant to substitute for these existing programs. Rather, the information can supplement existing programs to update assistance methods and program areas.

COMMUNITY CONFIRMATION

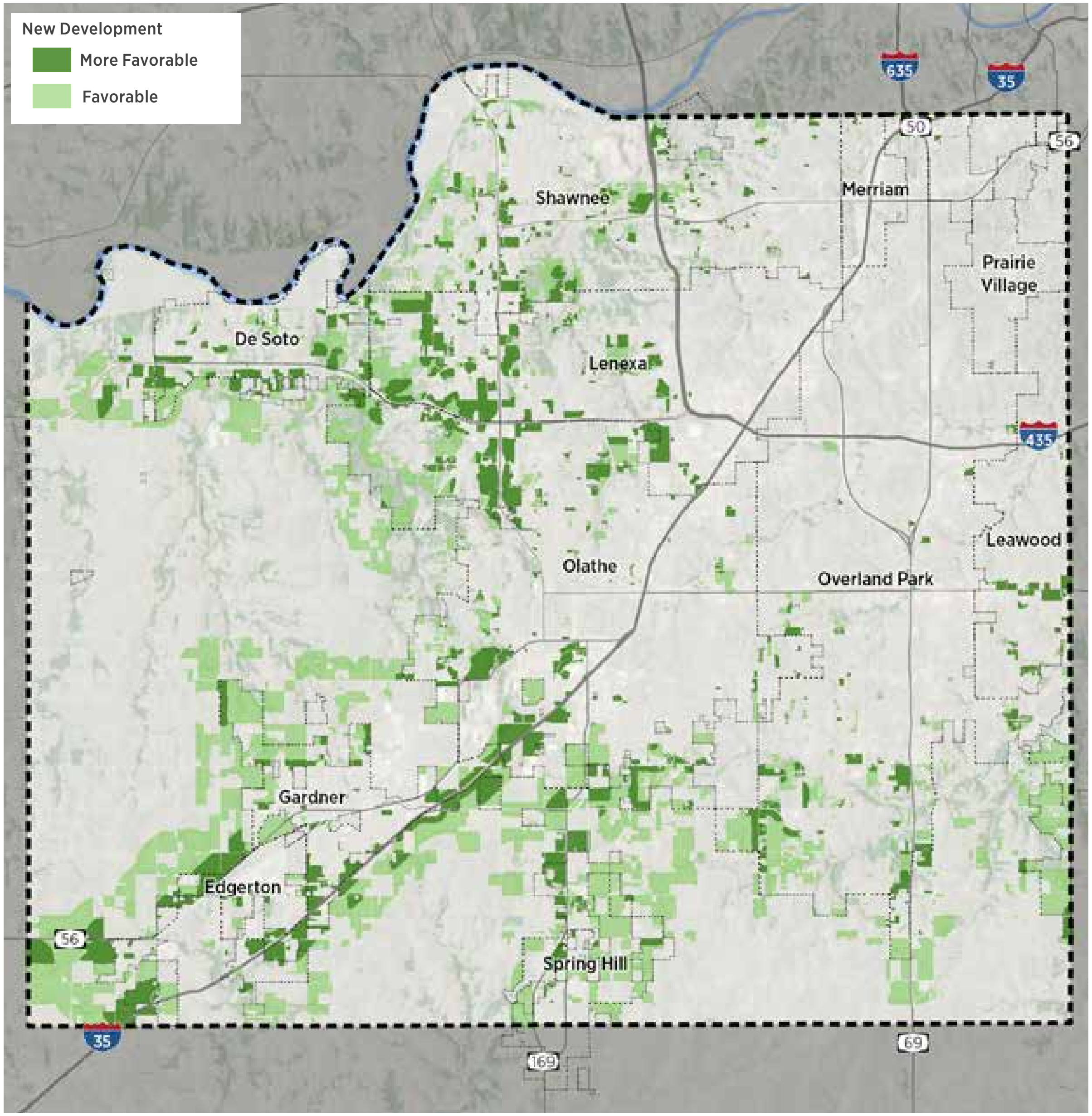
The voices of people living in Johnson County helped confirm the most important criteria to meet housing needs. Those insights described in Chapter 2 are information to include when developing programs and policies for target opportunity areas in this section.

DEVELOPMENT & POTENTIAL OUTCOMES

The analysis and interaction of the development criteria give a general idea of areas to explore in more detail for targeted strategies and programs. **Map 3.1** shows potential priority areas for new attainable housing development.

Note, **Map 3.1** shows areas that meet the criteria on the previous pages, taken at a point in time. Some of these areas are not yet served by utilities or infrastructure but are areas for new neighborhoods as cities naturally grow and subdivide over time. Areas not shaded green are less favorable for further development based on the housing attainability criteria used or are already developed.

MAP 3.1: ATTAINABLE HOUSING DEVELOPMENT OPPORTUNITIES



Source: RDG Planning & Design

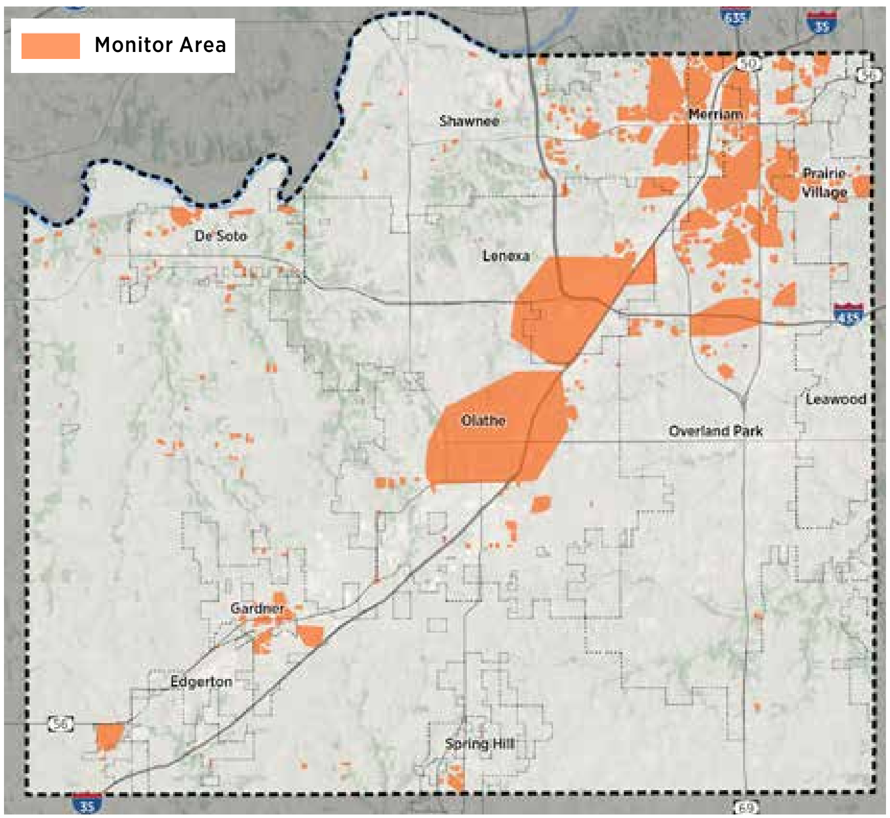
Map 3.2 shows priority areas for attainable housing rehabilitation and stabilization. The map is general, showing higher priority areas of potential housing rehabilitation over time in older neighborhoods, based on the criteria on the previous pages.

Lastly, there are opportunities throughout the county for redevelopment and infill housing development. Many of these areas are along existing commercial corridors with decline in retail activity. Underperforming corridors are opportunities for small scale, higher density housing. These are areas for housing by jobs and transit.

Map 3.3 is a clip of the Connected KC 2050 map for Johnson County showing activity centers, mobility hubs, planned transit improvements, and the urbanized area before 1990. The blue areas are opportunity redevelopment areas for higher density housing. Information in section 2 and 3 provides context to **Maps 3.1** and **3.2**.

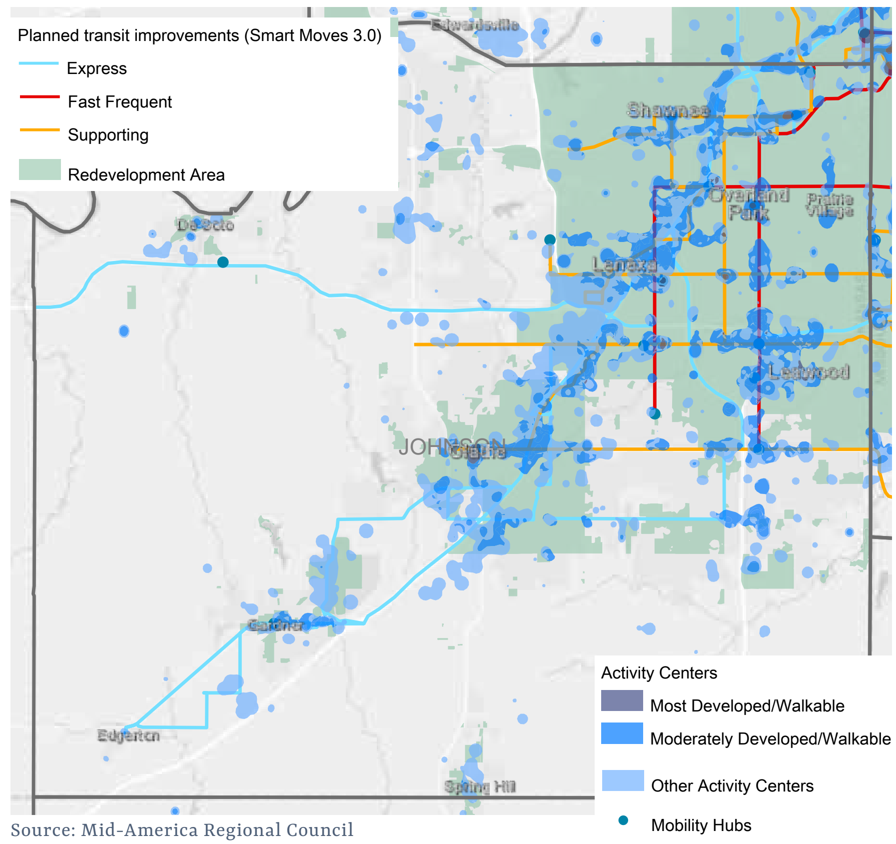
- Section 2, Community Profiles, develops housing demand projections for the larger municipalities for the next ten years. The housing demand projections include demand by price point given what households under each income range can reasonably afford. Qualitative information for each city provides context to the demand projections to further refine the potential and needs in each city.
- Section 3, A Path Forward, recommends strategies to meet housing needs relative to development potential in each city. Housing goals may be the same for multiple cities, but achieving the goal requires different strategies for different community contexts. Strategies include infill, new development, rehabilitation, redevelopment, and property maintenance targeted programs.

MAP 3.2: REHABILITATION AND STABILIZATION AREAS



Source: RDG Planning & Design

MAP 3.3: OPPORTUNITY REDEVELOPMENT AREAS



Source: Mid-America Regional Council

SECTION TWO

COMMUNITY PROFILES

INTRODUCTION

The cities of Johnson County are different. The county's location on the edge and part of a large metropolitan area creates evolving market characteristics. Some cities are poised to change more drastically over time through growth and housing development. Others will also change, but related more to demographic composition and housing conditions. In all cities, affordability of housing and transportation will remain an important component to manage.

This section provides detail from chapter 1 related to each city, its growth, and future housing demand. The section groups cities into cohorts by common characteristics to shape housing strategies. The cohorts include:

- **Chapter 4: Large Tier. Overland Park, Olathe, Shawnee, Lenexa, Leawood, Prairie Village, Gardner. The large-tier cohort includes cities with the largest population growth potential by number of residents in the future.**
- **Chapter 5: Mid-Tier Communities - Merriam, Mission, Roeland Park, Spring Hill, De Soto, Edgerton. The mid-tier communities have smaller populations and resources for housing program strategies.**
- **Chapter 6: Small-Tier Communities - Fairway, Lake Quivira, Mission Hills, Mission Woods, Westwood, Westwood Hills. Small-tier communities are generally land-locked and represent the smallest by population in Johnson County. There are even more limited resources for these local cities to address housing strategies. However, issues to address may not be as prominent.**

Each large, medium, and small tier city’s future housing demand relies on data to inform reasonable forecasts.

Population change - The population characteristics and trends shine a light on current housing demand and provide a base to project future population and housing demand through 2030. Total housing demand, regardless of type, is most influenced by changes in the population.

Growth analysis – Future annual growth rates detail the total future housing needed per year to meet demand. The growth rate forecasts for each community consider recession and expansion times, understanding that housing production will fluctuate from year to year.

Ten-year population forecasts – Ten years is a reasonable future timeline to forecast the population to assign housing needs. Any longer increases the margin of error. Any shorter does not provide enough time to establish the strategies and evaluate the results. See Chapter 1 for the full population forecast methodology.

Household income – Income varies by age and location within a city. As discussed in Chapter 1, housing is the largest life expense for most households. Income is a driving factor in where people choose to live.

Housing occupancy – Whether households own or rent gives indications for needs in the housing market and how occupancy is changing over time. Often a shift toward more rental occupancy can mean an unattainable ownership market or an increase in younger populations.

Historic construction activity – How many housing units by type were built in the past helps understand the market response to housing demand in a community. When other factors indicate a good market for housing but construction numbers lag, there may be systematic challenges or barriers in the community to explore further.

Age of housing – The existing housing stock is often the most abundant resource of attainable housing. However, while older housing may be more attainable, it also requires the most maintenance that some homeowners cannot afford. These may be target areas for housing programs.

Home sales – The rate of sales, days on the market, and sale price gives current indications on the lack of housing options and a community's desirability.

Housing affordability – The ability to afford to live in a community will vary by age group, income level, and owner versus rental housing costs. Housing programs to address affordability will vary by community-based on housing gaps at certain price points. Generally, there are several categories and strategies to address affordability gaps:

› Lowest price points and income levels – Housing cannot be built in the market without substantial public sector assistance. However, These ranges also include retirees on fixed incomes and those individuals working minimum wage jobs. These households would qualify for most government housing programs and are traditionally renters, if not a retiree with no mortgage.

› Low to mid-price points – Households looking for these price points would traditionally be in the ownership market but are frequently looking to rent when they first arrive in a community. This market is also the hardest for the private market to produce owner-occupied housing without risk-sharing.

› Workforce housing price points – These tend to be blue-collar or entry-level positions. These households can be looking for owner-occupied housing, but the private market often struggles to produce new units priced below $250,000.

› Above market rate price points – These are the homes and rentals generally being produced by the private market in Johnson County, above $250,000 or $1,500 a month in rent. These price points would typically require a household to earn more than $100,000 a year.

› High end and luxury price points – These homes and rentals are built in specific areas in some communities or existing homes that have appreciated over time. These may be appealing to some households that can afford them. However, if not appealing, higher-income households will choose price points below their means, which takes an attainable unit off the market for households with lower incomes.

Development potential – A closer look at each community based on the information presented in Chapter 3.

Housing demand – How many housing units are needed each year, on average, in each community to support population changes, household sizes, and replace lost units

Development program – How the total housing demand should be allocated by housing occupancy (owner versus rental) and price point to meet population demands.

Together, all these data components and qualitative community conversations shape the housing strategies in Section 3.

CHAPTER FOUR
LARGE-TIER COMMUNITIES

Large tier communities have the widest range of housing types, potential challenges, and opportunities. Resources in these communities are generally more feasible to access because of population size and city staff resources. While these communities are in the same cohort, the following data illustrates different social and built characteristics, and housing development programs.

OVERLAND PARK

Overland Park is the largest city in Johnson County. There are a variety of housing types in the city with varying degrees of housing characteristics mostly based on location. Land within current city limits will support housing demand through 2030.

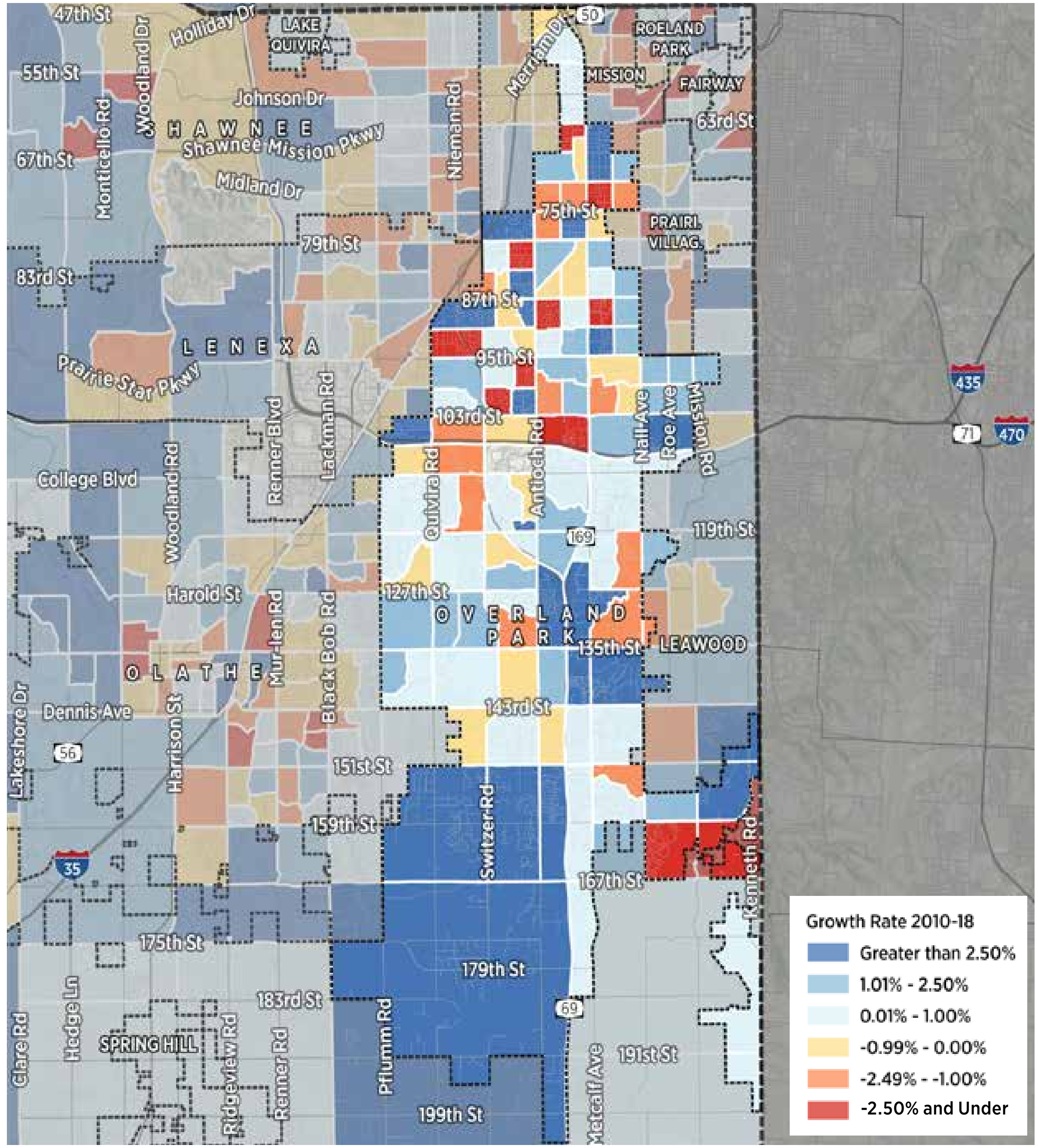
POPULATION CHANGE

Population in Overland Park continues to grow with the highest decade change occurring between 1960 and 1970. Growth trajectories will continue south. In general, spatial population changes over time followed city annexations, shown in **Map 4.1**.

GROWTH ANALYSIS

While Overland Park grew rapidly since 1990, annual growth rates declined in the recent decade as would be expected as a city gets larger. Growth in Overland Park should remain strong and consistent in the future because of its location on several major transportation routes.

MAP 4.1: POPULATION GROWTH RATE 2010-2018 BY BLOCK GROUP, OVERLAND PARK

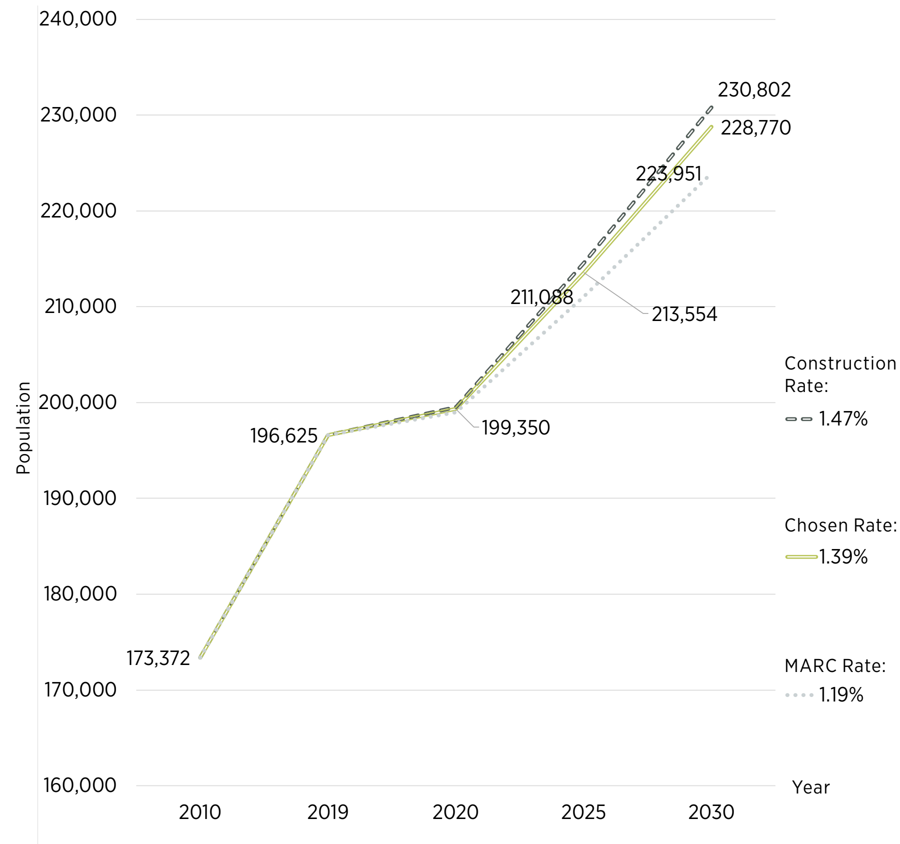


Source: U.S. Census; American Community Survey (2018 5-year Estimates)

TEN-YEAR POPULATION FORECAST

Figure 4.1 shows population forecast scenarios through 2030. MARC projects a 1.19% annual growth rate. Population growth based on construction rates since 2012 indicates a 1.47% growth rate, with the actual population growth rate since 2000 slightly below that at 1.47%. The growth rate used for planning purposes in this study is a 1.39% annual growth rate, which Overland Park would see over 29,000 new residents from 2020.

FIGURE 4.1: POPULATION GROWTH RATE SCENARIOS, OVERLAND PARK



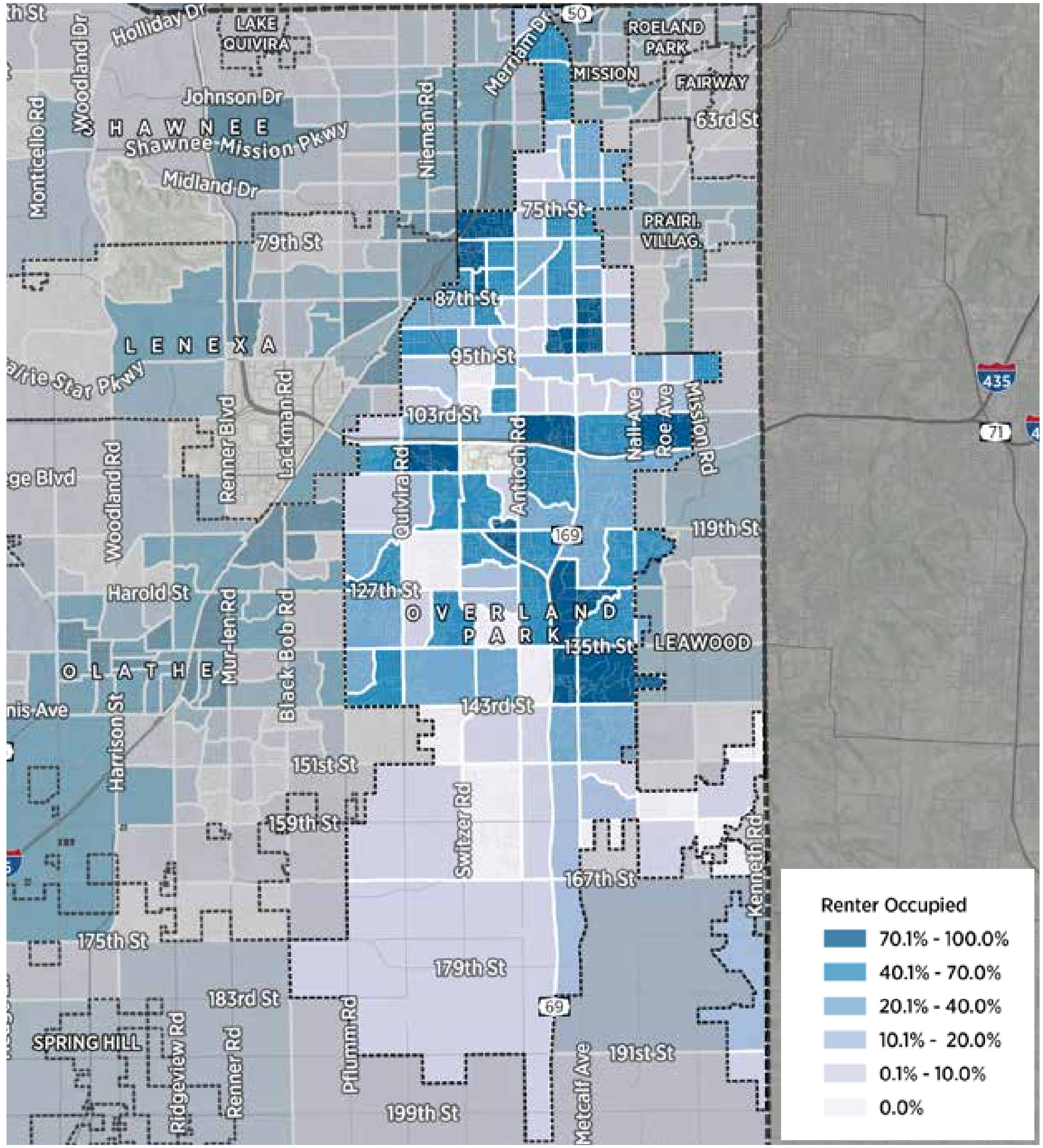
Source: U.S. Census; MARC; RDG Planning & Design

HOUSING OCCUPANCY

Map 4.2 and **4.3** illustrates the percent of renter-occupied households by Census block group.

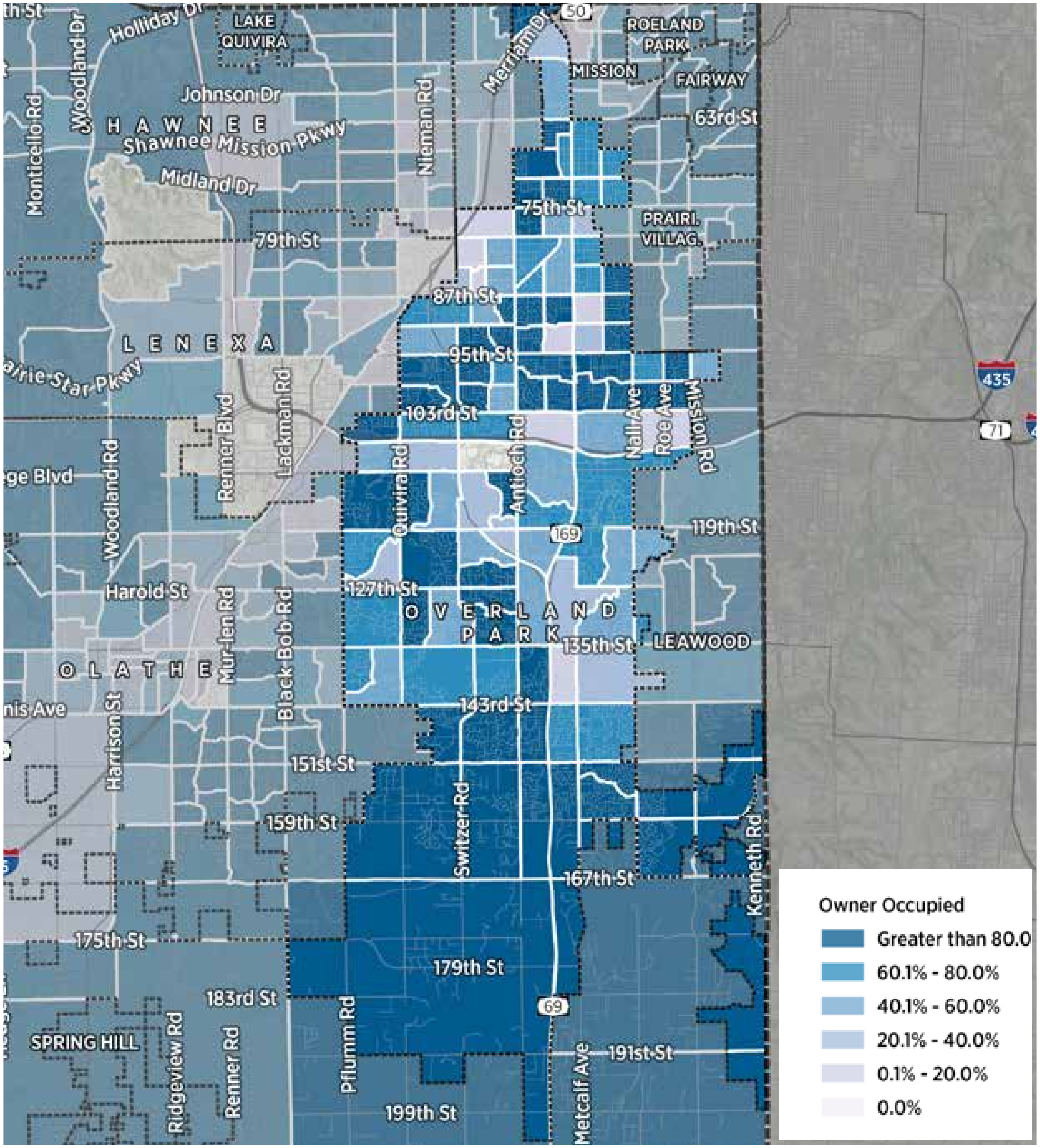
- Vacancy rates are relatively stable citywide, between about 5% and 6% from 2000-2018. A healthy market vacancy rate is around 6%.
- Household size is around 2.4 people per household, which is higher than most cities in Johnson County.
- Renter occupancy is evenly distributed throughout the city except for south of 143rd Street, where all Census tracts are mostly owner-occupied.

MAP 4.2: PERCENT RENTER-OCCUPIED STRUCTURES, OVERLAND PARK



Source: American Community Survey (2018 5-year Estimates)

MAP 4.3: PERCENT OWNER-OCCUPIED STRUCTURES, OVERLAND PARK



Source: American Community Survey (2018 5-year Estimates)

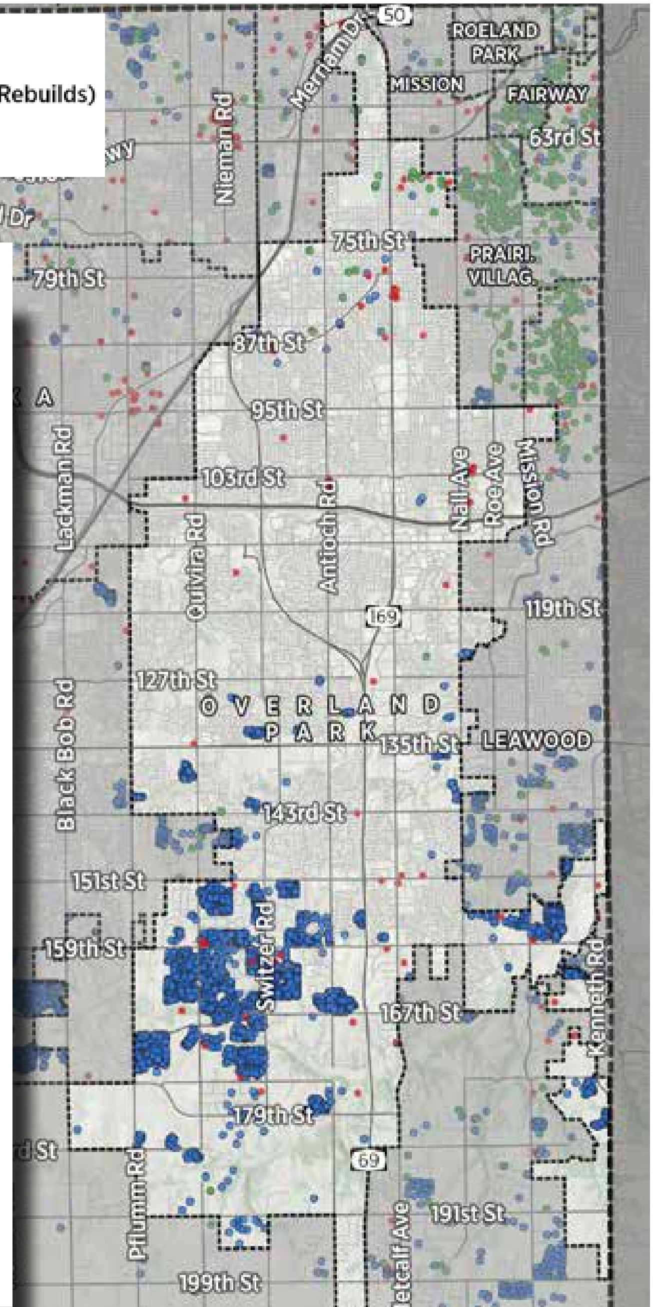
- Across the city about 63% of housing units are owner-occupied. This is a decrease from about 65% in 2010.
- With the size and amount of workforce needed in Overland Park, the falling ownership structure ratio is understandable and acceptable to provide rental options for new employees and young professionals.

CONSTRUCTION ACTIVITY

Like many cities, residential construction activity continues to increase since the Great Recession. Considering the average household size, residential construction since 2012 would equate to a 1.5% annual growth rate. **Map 4.4** shows the location of permits. Between 2012 and 2019:

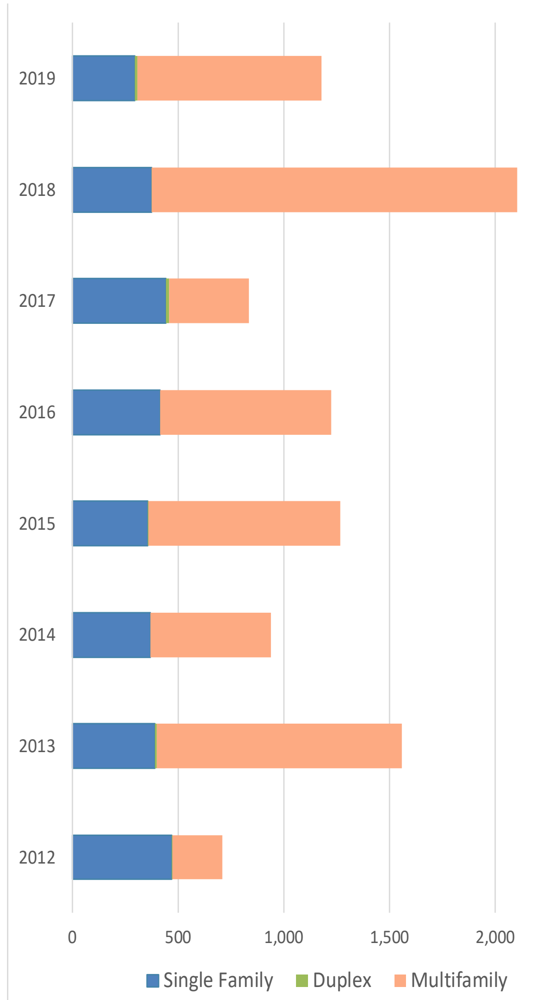
- About 32% of new units were single-family dwellings. The annual permits were consistent with 2019.
- About 68% of new units were multi-family units which include apartments, townhomes, and any structure with more than two units. Most of these units are higher end market rate units.
- Demolitions were relatively non-existent. The demolitions that did occur are mostly because of accidents or redevelopment on the same lot.

MAP 4.4: RESIDENTIAL NEW CONSTRUCTION PERMITS BY LOCATION (2010-2019), OVERLAND PARK



Source: Johnson County GIS Department

FIGURE 4.2: RESIDENTIAL DEVELOPMENT PERMITS BY YEAR



Source: City of Overland Park

AGE OF HOUSING

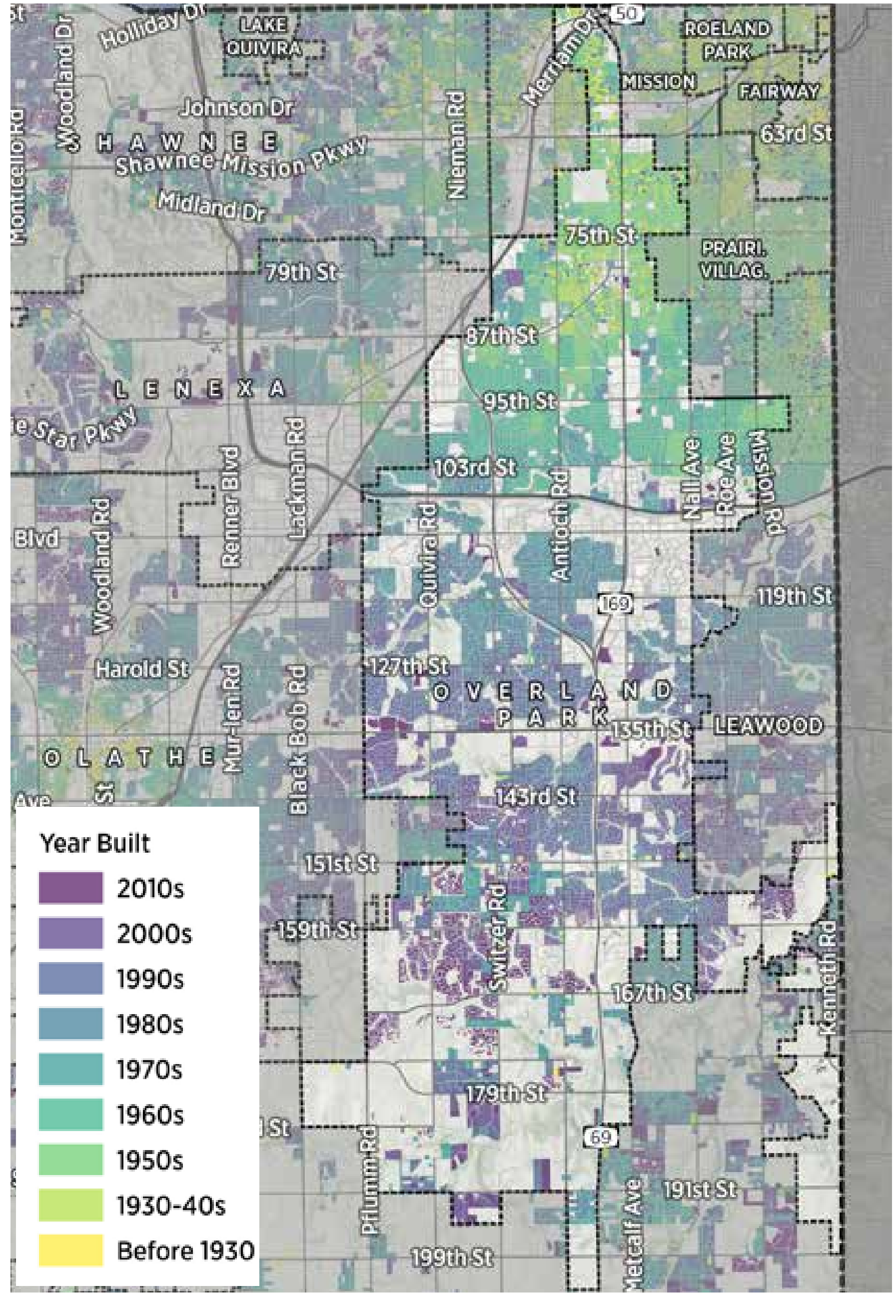
Map 4.5 shows the year built of residential dwellings. The age of housing provides insight into areas more susceptible to deterioration and additional homeowner costs, correlated with the stabilization areas in Chapter 3. If these areas are also occupied by lower income households, then monitoring of rehabilitation needs is even more critical.

- Overland Park has a relatively modern housing stock. About 61% were built after 1980.
- About 12% of homes were built before 1950. These are the homes typically in the most need of repairs and at risk of falling into dilapidation.

"I think there is a wide variety of housing avail. in Overland Park. Rehab loans with very low interest are a great way to help people buy something affordable and fix it up! ..."

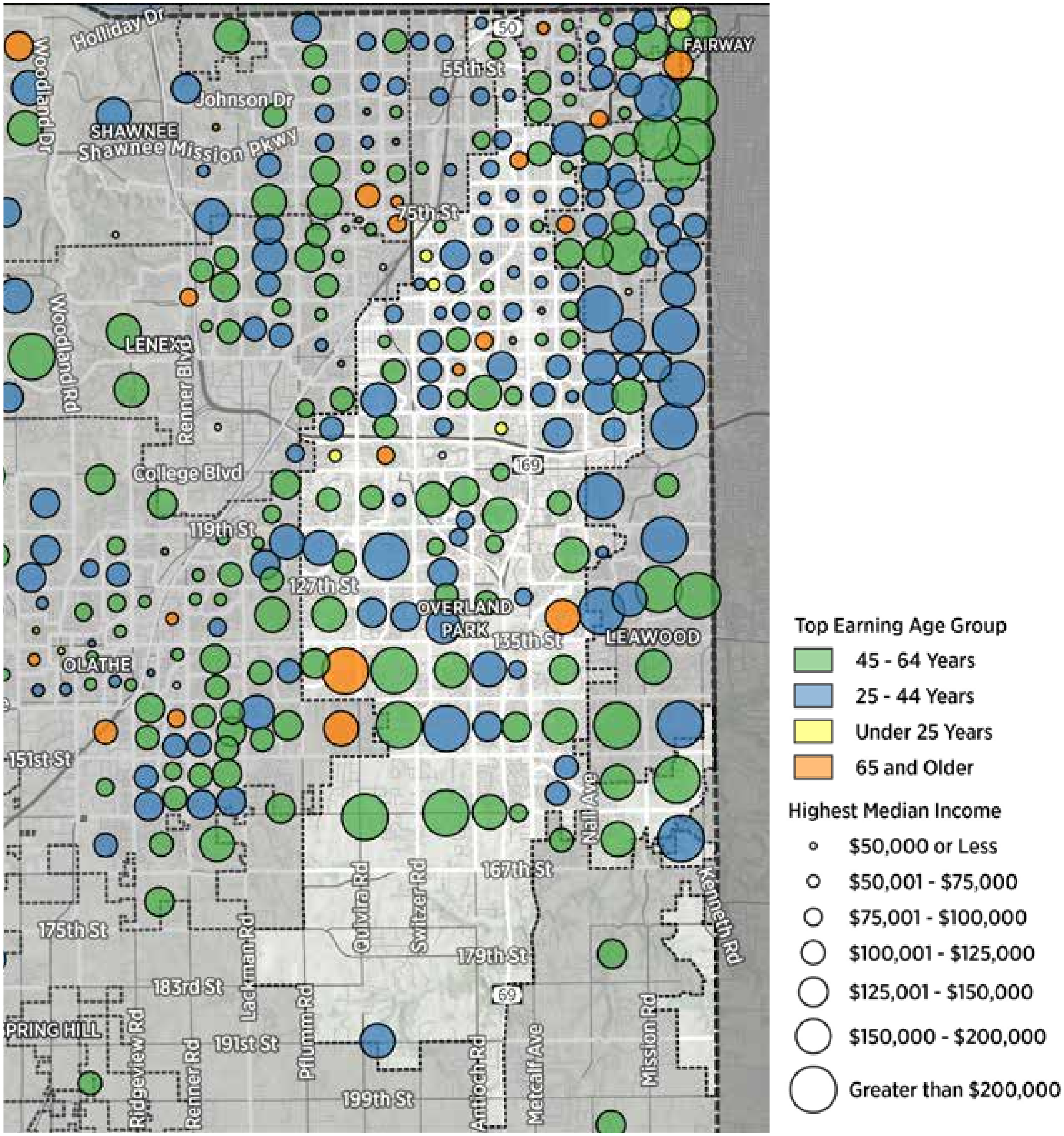
- Survey Respondent

MAP 4.5: AGE OF HOUSING STOCK, OVERLAND PARK



Source: Johnson County GIS Department, Assessor Data

MAP 4.6: HOUSEHOLD INCOME OF TOP EARNING AGE GROUP, OVERLAND PARK



Source: American Community Survey (2018 5-year Estimates)

HOUSEHOLD INCOME

Map 4.6 provides an overview of Overland Park's estimated household incomes:

- Median household income is $85,651. The city only saw a 16% increase in median income between 2010 and 2018, about average for the county.
- Higher incomes are seen by individuals between the ages of 45 and 64 years and geographically are located in the south-central part of the city. Younger households understandably tend to make less, key considerations for rental and entry-level housing.

"Mixed/assisted housing is needed in Downtown Overland Park. The project at 79th & Santa Fe needs to be owned by a local non-profit community affordable housing developer that is led by a consortium."

- Survey Respondent

HOME SALES

How quickly homes sell in a market is a leading indicator of housing demand and supply. **Figure 4.3** shows single-family home sales data from 2017-2019. In Overland Park, similar to other areas in the county:

- Average sales prices increased since 2017 by about 7.5% or about 2.4% annually.
- The volume of single-family home sales remained relatively the same, around 2,700 units.
- The average number of days homes stay on the market fluctuated between 50 and 70 days. Compared to other Johnson County cities, Overland Park is in the middle for time to sell. However, under 100 days is fast in any market. Some unique or luxury homes likely drive up the average days on the market reported.
  - For example, homes in the 66214 Zip code had an average days on market under 25 days for the last three years (around the I-35/Hwy 69 interchange). In contrast, the 66085 Zip code was over 100 days (southern Overland Park where new homes are being built).

FIGURE 4.3: SINGLE FAMILY HOME SALES, OVERLAND PARK

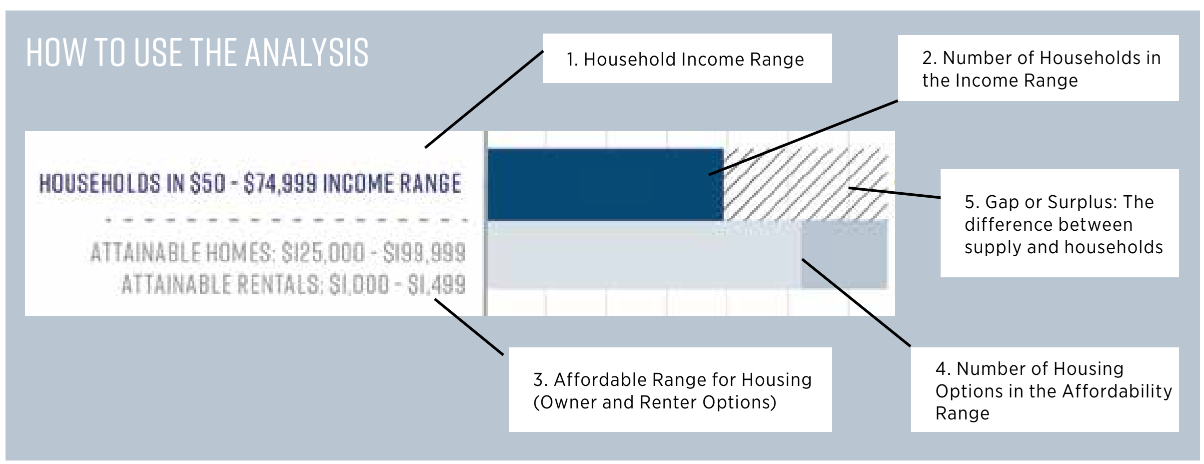
Source: Multiple Listings Service (2017-2019)

HOUSING ATTAINABILITY AND SUPPLY ANALYSIS

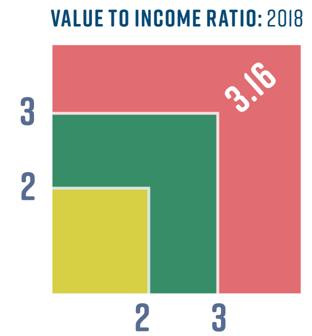
By comparing the distribution of household incomes with housing costs, a picture of supply and demand emerges across all of Overland Park's housing market. **Figure 4.4** examines supply and demand through the lens of what is "affordable" to different income groups to answer the question: is there an adequate supply of housing options available for residents of different income groups?

Figure 4.4 illustrates five major components in pursuit of the above story:

1. **Income Ranges.** The starting point of the analysis is the spectrum of incomes across all residents of Overland Park. From these incomes, corresponding "affordable" housing prices are established for ownership and rental opportunities.
2. **Number of Households in Each Income Range.** The number of households in each income range is the demand; these residents seek housing options in Overland Park that are affordable to them.
3. **Affordability Ranges.** An affordable ownership home is calculated at 2-3 times the household income depending on the income range. Lower income households tend to spend a higher percentage of their income on housing and higher income households tend to spend a lower percentage of their total income on housing. An affordable rental would be about 20% of household income.
4. **Number of Housing Units in Each Affordability Range.** The number of housing units in each affordability range is the supply of affordable options.
   - Composition of Housing Supply. This illustrates the share of the supply met by ownership and renter housing options.
5. **The Balance of Supply and Demand.**
   - If the number of households exceeds the number of units available, those households must seek options in different affordability ranges.
   - If the number of units exceeds the number of households, it indicates that the units are occupied by households in different income ranges.
   - **This analysis is meant to illustrate larger trends in how existing units are being occupied. It does not demonstrate exact market demand in certain price ranges.**



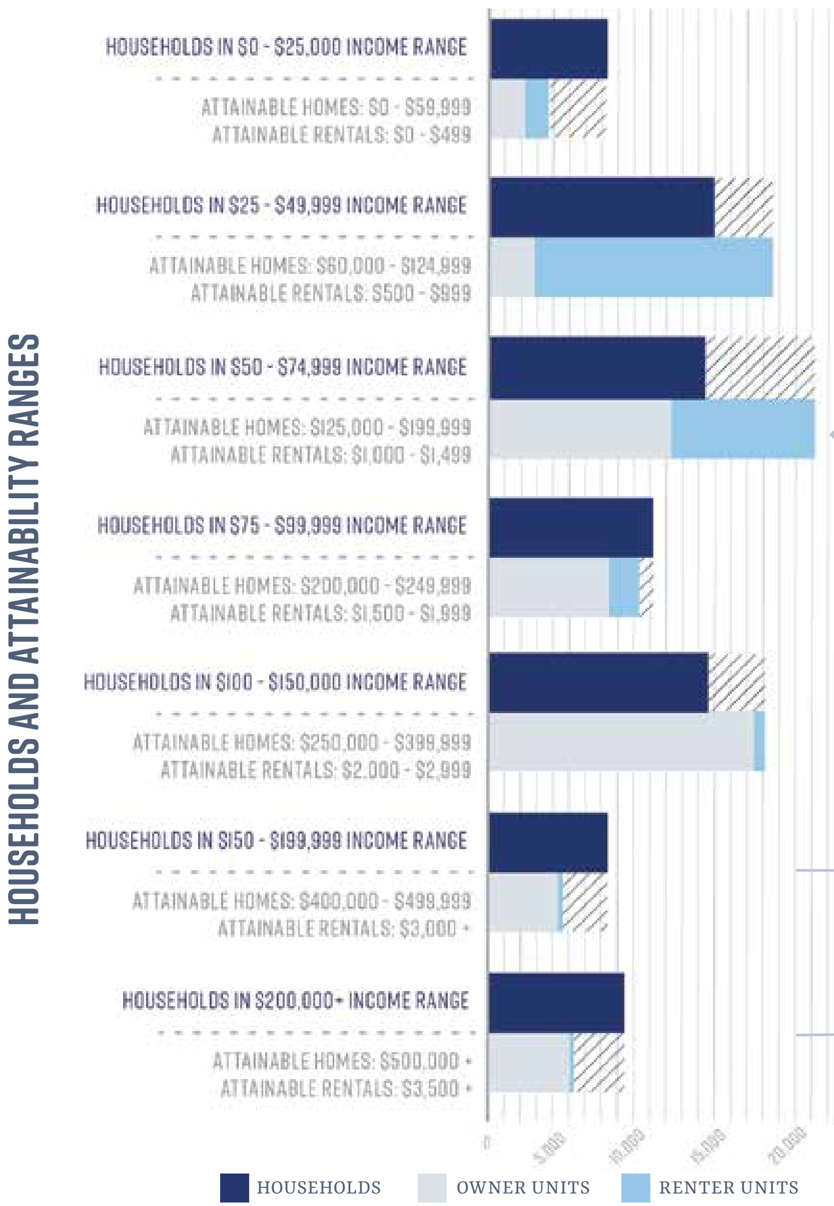
VALUE TO INCOME BENCHMARK



A healthy, self-sustaining housing market will have a value to income ratio between 2 and 3. Overland Park's is 3.16, slightly up from 3.11 in 2010.

The analysis in **Figure 4.4** is based on all the households today that are occupying a unit. No household is without a unit.

FIGURE 4.4: HOUSING ATTAINABILITY,OVERLAND PARK (2018)



Source: American Community Survey (2018 5-year Estimates); RDG Planning & Design

Overland Park has a supply of ownership options priced between $125,000 and $200,000 but without other options households making over $75,000 per year also compete for these units.

- More households than affordable options but some include students with little income and housing costs that are supported by parents and loans. Some also include older households with little income but in homes owned outright. For example:
  - 27% of all owner-occupied households in Overland Park are over the age of 65.
  - The median household income for households over 65 is estimated at $58,678, meaning that 50% of those households make less than $50,000. This is lower than the citywide median of $85,651.
  - 57% of owner-occupied households over the age of 65 and 30% citywide do not have a mortgage.

- Fewer households than attainable options. These units are filled by lower income households.

- Overland Park has a supply of ownership options priced between $125,000 and $200,000 but without other options many of these units are filled by retirees and households making over $75,000 per year.

- There are fewer households than affordable options. Many units in this range see competition from upper income brackets.

- More households than attainable options in this range. Builders continue to serve this market (over $400,000) but many households in this range continue to occupy lower cost housing. This is good for them because they have more to spend on other things. However, it is not beneficial for lower income brackets that rely on the occupied lower price point housing units for attainable housing.
  - This may be counterintuitive based on conversations that people only see higher priced construction in the city. That could be the market catching up with demand in this income range.

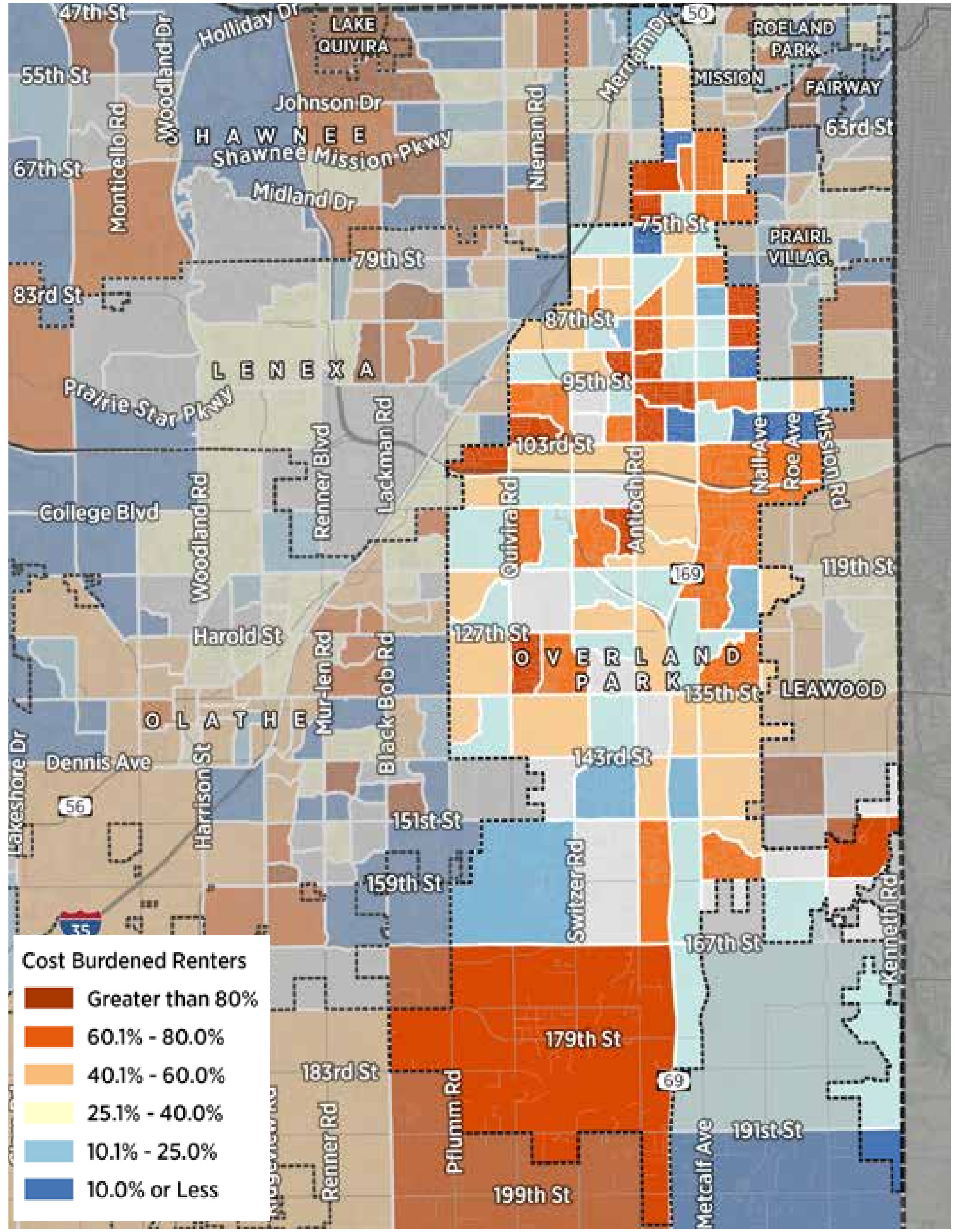
COST BURDENED RESIDENTS

Map 4.7 and 4.8 illustrates the level of cost-burdened households. According to the U.S. government, households spending more than 30% of their income on housing are considered cost-burdened.

- Approximately 37% of Overland Park's households living in renter housing spend more than 30% of their income on gross rent. Overland Park has experienced strong growth in the number of rental units (1,729 in 2018 and 870 in 2019), which traditionally demand more rent than older units.
- Adding units to the market should create market pressures on older units to adjust rates down. However, many of the new units are high end luxury which are well above what older units may be charging, and thus, not a force to adjust rents.
- Median rents in Overland Park are close to the overall average for the county at $948 per month.

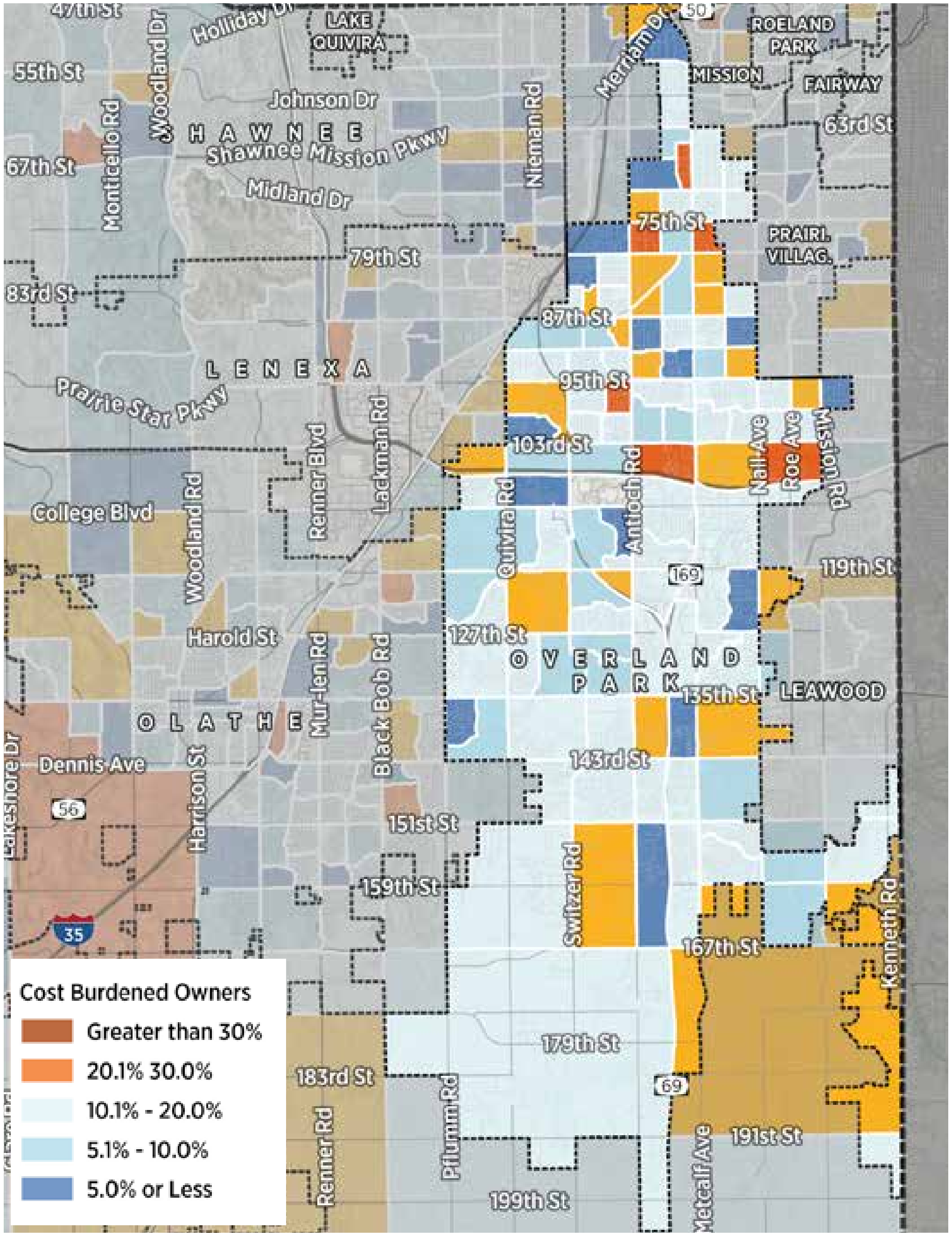
> "My son is in the SMSD district ...it's extremely difficult to stay in boundaries with my budget. I love Overland Park. Born and raised here, but lack of rental properties makes me look elsewhere when my lease is up..." - Survey Respondent

MAP 4.7: PERCENT OF RENTER OCCUPIED COST BURDENED HOUSEHOLDS, OVERLAND PARK



Source: American Community Survey (2018 5-year Estimates)

MAP 4.8: PERCENT OF OWNER OCCUPIED COST BURDENED HOUSEHOLDS, OVERLAND PARK



Source: American Community Survey (2018 5-year Estimates)

- About 29% of households living in owner-occupied housing spend more than 30% of their income on housing. This is 11 percentage points lower than renters but higher than several other cities in the county.
- Median home values are average for the county at $261,200. The median is up 17.3% since 2010, in line with neighboring communities like Olathe, Lenexa, and Leawood.

"There is a severe lack of housing for smaller, middle income families: 2-3 bedroom homes $120k-180k in the Overland Park area. Almost all homes for sale with 1.5+ bathrooms start at 200k and are in North OP. South OP lacks any smaller, middle income homes at all with houses starting at 300k."

- Survey Respondent

HOUSING DEMAND

The housing demand analysis builds on the population projections, housing trends, and community conversations to forecast the demand for additional housing. The model is built on the following assumptions with a 1.39% growth rate:

- The proportion of the household population (those living in households and not in dorms, skilled nursing, or prisons) will remain stable through 2030.
- Average people per household is expected to slightly decline over the next decade as recent mixed-use projects are completed. Some growth may occur as Millennials move into their childbearing years, but Baby Boomer households will also continue to shrink.
- Unit demand at the end of the period is calculated by dividing household population by the number of people per household. This equals the number of occupied housing units.
- A manageable housing vacancy provides housing choices for residents moving to the community. As noted earlier, Overland Park's rate is stable. Recent recessionary concerns in 2020 may slightly increase vacancies in the short term.
- Unit needs at the end of each period are based on the actual household demand and projected vacant units.

FIGURE 4.5: HOUSING DEMAND MODEL, OVERLAND PARK

	2020	2025	2030	TOTAL
POPULATION AT END OF PERIOD	199,350	213,554	228,770	
HOUSEHOLD POPULATION AT END OF PERIOD	197,806	211,900	226,998	
AVERAGE PEOPLE PER HOUSEHOLD	2.35	2.34	2.33	
HOUSEHOLD DEMAND AT END OF PERIOD	84,173	90,556	97,424	
PROJECTED VACANCY RATE	6.0%	6.0%	6.0%	
UNIT NEEDS AT END OF PERIOD	89,546	96,336	103,643	
REPLACEMENT NEED (TOTAL LOST UNITS)		50	50	100
CUMULATIVE NEED DURING PERIOD		6,840	7,357	14,197
AVERAGE ANNUAL CONSTRUCTION		1,368	1,471	1,420

Source: RDG Planning & Design

- Replacement need is the number of housing units demolished or converted to other uses. Homes in poor condition or obsolete should be gradually replaced in a city's housing supply. The number of units lost annually is based on historic demolition rates.
- Cumulative need shows the number of total units needed between the base year of 2020 and the year indicated at the end of the period.

Figure 4.5 shows an average annual construction need of 1,420 units. The average annual construction rate from 2012 to 2019 was 1,216 units, with a high of 2,094 in 2018 and a low of 705 in 2012. Recent growth has been attributed equally to a large number of rental units, a trend needing to continue.

DEVELOPMENT PROGRAM

Building on the housing demand model, the development program forecasts production targets for owner and renter-occupied units based on the following assumptions:

- Owner-occupied units will be distributed roughly in proportion to the income distributions of the households for whom owner occupancy is an appropriate strategy.
- Most low-income residents will be accommodated in rental units. It is challenging for low-income residents to save for the downpayment and maintain the savings necessary for maintenance of a home (replacement of a roof or furnace). Rental units can be many types of housing including apartments, townhomes, duplexes, and single-family homes and, as they are now, should continue to be spread throughout the county.
- The model illustrated in **Figure 4.6** targets a split of 60% owner- and 40% renter-occupied units. This accounts for commercial corridors that may begin to add density with redevelopment projects and the continued need for rental options in new development areas.

FIGURE 4.6: HOUSING DEVELOPMENT PROGRAM, OVERLAND PARK

	2025		2030		2020-2030	
TOTAL OWNER OCCUPIED						
ATTAINABLE: <$200,000	1,636	4,104	1,760	4,414	3,369	8,518
MODERATE MARKET: $200-250,000	609		655		1,264	
MARKET: $250-350,000	814		875		1,689	
HIGH MARKET: OVER $350,000	1,045		1,124		2,169	
TOTAL RENTER OCCUPIED						
ATTAINABLE: LESS THAN $1,000	1,304	2,736	1,402	2,943	2,706	5,679
MARKET: $1,000-1,500	810		871		1,681	
HIGH MARKET: $1,500+	623		670		1,292	
TOTAL NEED	6,840		7,357		14,197	

Source: RDG Planning & Design

- Approximately 4,633 additional owner-occupied units are needed priced below $250,000 (in 2019 dollars). This demand will come through existing housing stock being freed up through move-up housing, or products that do not fit the traditional detached single-family homes.
- Nearly 2,706 rental units will need to be produced with rents below $1,000 per month. The lowest rent units below $600 will have to be generated through subsidy programs like low-income housing tax credits.

COMMUNITY PERCEPTIONS

SURVEY

A total of 1,162 residents from Overland Park took the community survey made available online and in paper form. From their responses the following themes emerged:

- Housing types likely to be successful are those already present–mid-size, 3 bedroom homes, and small 2-3 bedroom homes. 69% of respondents also felt independent senior living would be successful.
- Respondents felt the housing supply in Overland Park was very similar to that of Johnson County (as illustrated in **Figure 4.7**).
    - According to respondents, the housing supply met the needs of all groups except multi-generational families, people with physical and/or mental disabilities, students, low wage workers, and households needing access to transit.
- When asked about solutions they would support to reduce housing costs in Johnson County, the highest ranked suggestion was down payment assistance to owners, followed closely by both duplex or town home construction and housing rehabilitation loans.
- Half of respondents looked to move within the past three years, 34% to an owner-occupied unit and 16% to a rental.
    - For those looking for owner units, a shortage was perceived for units under $200,000.
    - For rental units, half those looking saw a shortage in units under $500 a month and half between $500 and $1,000 a month.

FIGURE 4.8: DECISION TO MOVE IN PAST 3 YEARS

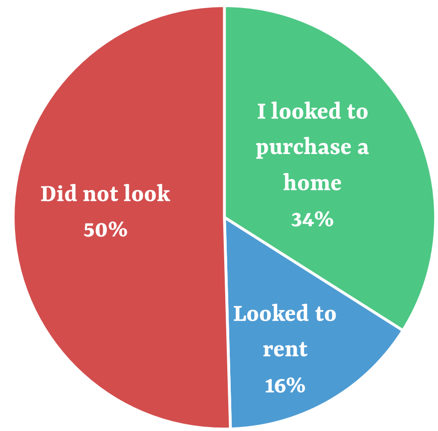
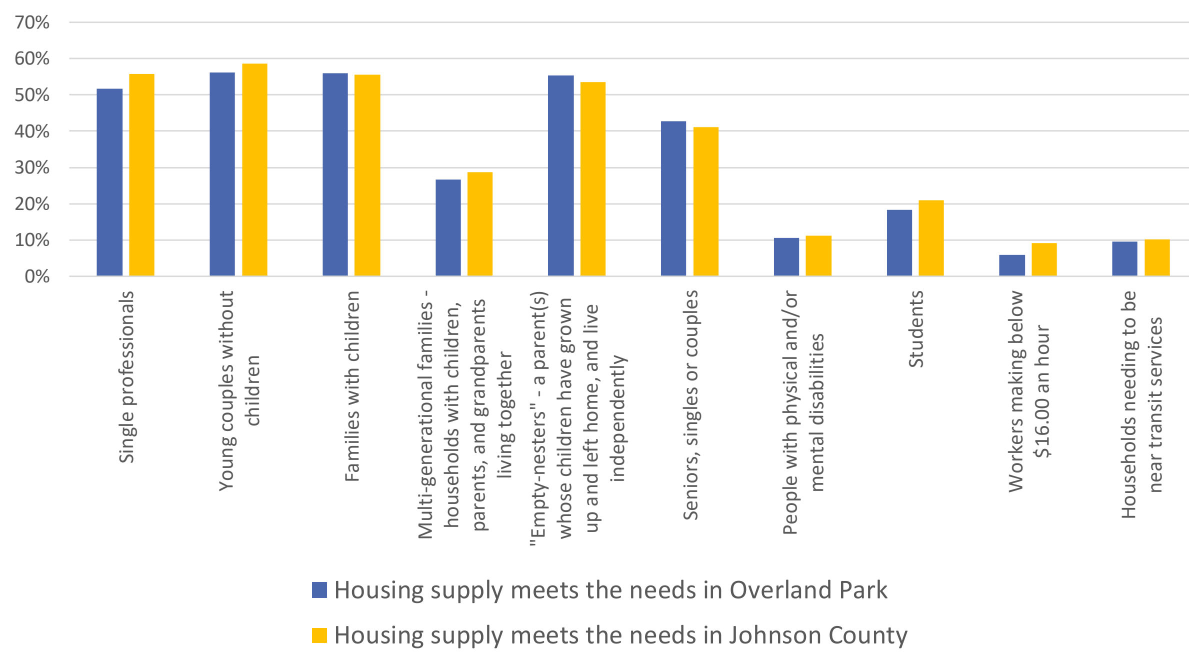


FIGURE 4.7: PERCEPTIONS THAT HOUSING SUPPLY CURRENTLY MEETS THE NEEDS OF THE FOLLOWING HOUSEHOLD TYPES



LISTENING SESSIONS

Many people familiar with the housing market specific to Overland Park participated in small group discussions. These included representatives from the Chamber, Council, Planning Commission, and real estate agents among others.

COMMON COMMENTS

Aside from common themes in Chapter 2 that pertain to the entire county, several common themes are apparent to Overland Park.

- There are big concerns for transportation from other areas by employers that hire hourly workers. Mostly that their employees do not live in Johnson County, leading to employee retention issues.
- Developers and builders perhaps see Overland Park as the easiest to work with because they are consistent in their application of design standards. They know what their timeline is going to be even if the design standards are high.
- The construction of multi-family has expanded in the past several years, with more luxury apartments being proposed.
- There is a disconnect between people wanting attainable options and others not wanting any more apartments or housing of any kind being built. The opposition from neighborhoods has led to housing project denials even if they meet all zoning and city requirements. This is a major barrier for getting a variety of housing in the city and developer confidence.

FIGURE 4.9: PERCEPTIONS OF HOUSING TYPES LIKELY TO BE SUCCESSFUL IN THE CITY

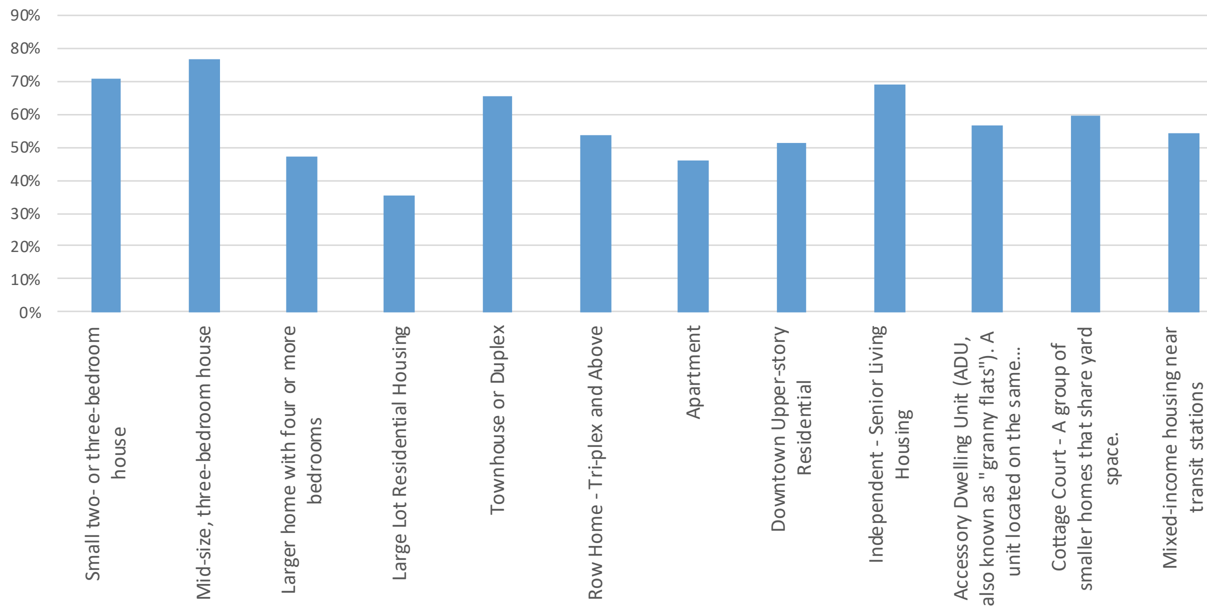
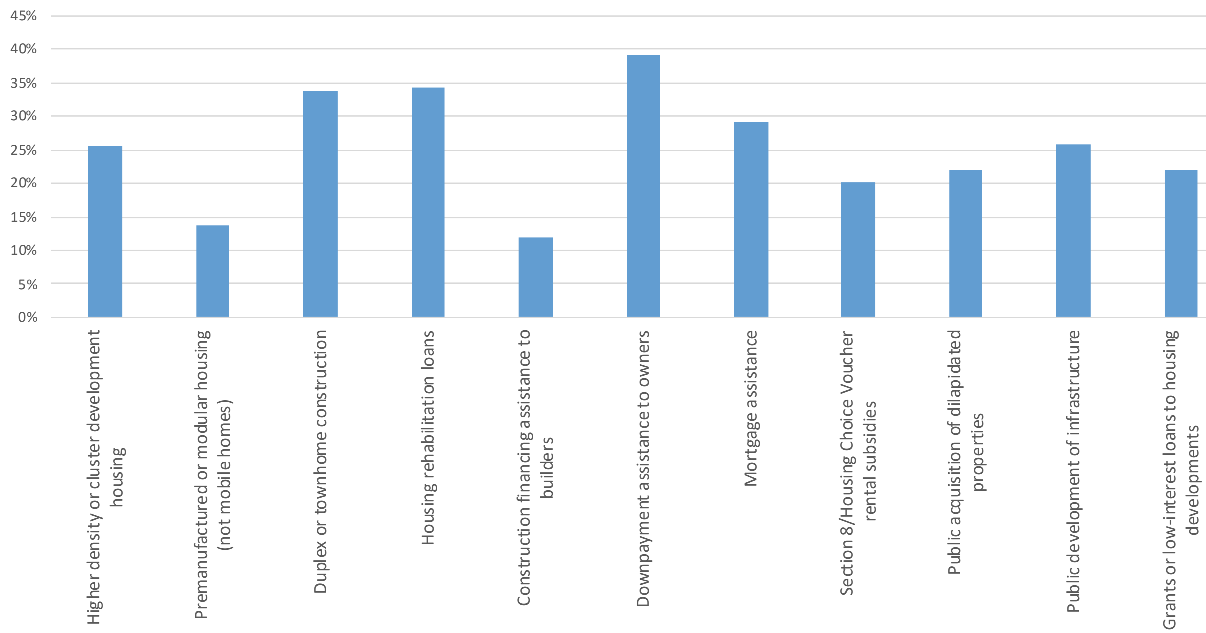


FIGURE 4.10: SUPPORT FOR HOUSING SOLUTIONS TO REDUCE HOUSING COSTS IN JOHNSON COUNTY



OLATHE

Olathe is the second largest city in Johnson County and has been growing steadily since 1990. A variety of housing types exist within the community and range in age from early 1900 single family homes to new construction. Olathe has plenty of new development and redevelopment opportunities to add additional housing units and variety to the market.

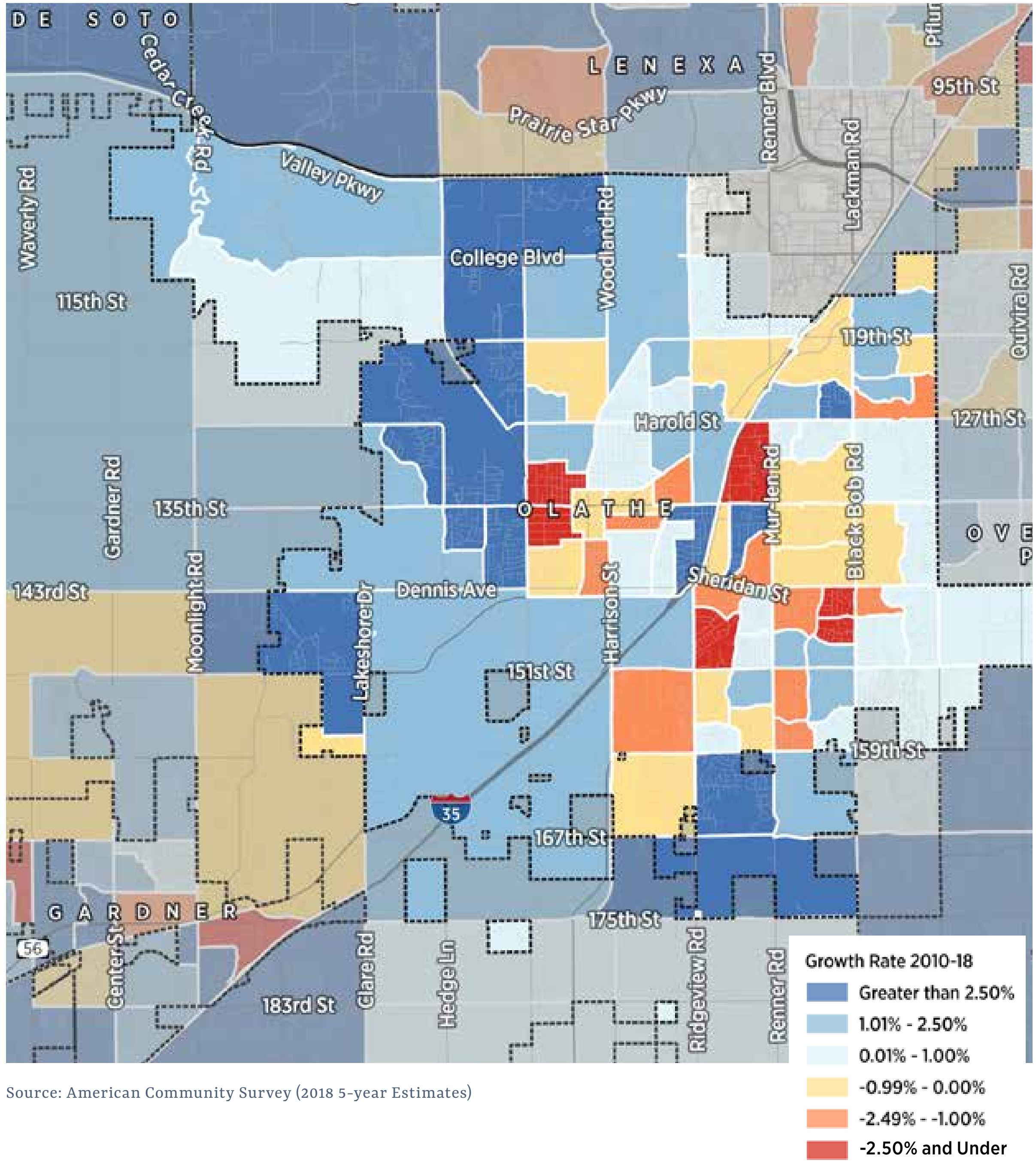
POPULATION CHANGE

Population in Olathe continues to grow with the highest decade change occurring between 1970 and 1980 when the city grew by 108%. The annual growth rate over the past several decades has declined slightly, dropping to 3.1% between 2000 and 2010. Estimates between 2010 and 2018 revealed a 1.3% annual growth rate, which is still heavy growth for a city its size.

GROWTH ANALYSIS

While Olathe has experienced steady growth since 1960, annual growth rates declined in the recent decade as would be expected as base population becomes larger. As the city continues to grow to the south and west along major transportation corridors, growth in Olathe should remain strong and consistent in the future. It is expected that Olathe's future growth will occur slightly above the growth rate experienced since 2010.

MAP 4.9: POPULATION GROWTH RATE 2010-2018 BY BLOCK GROUP, OLATHE

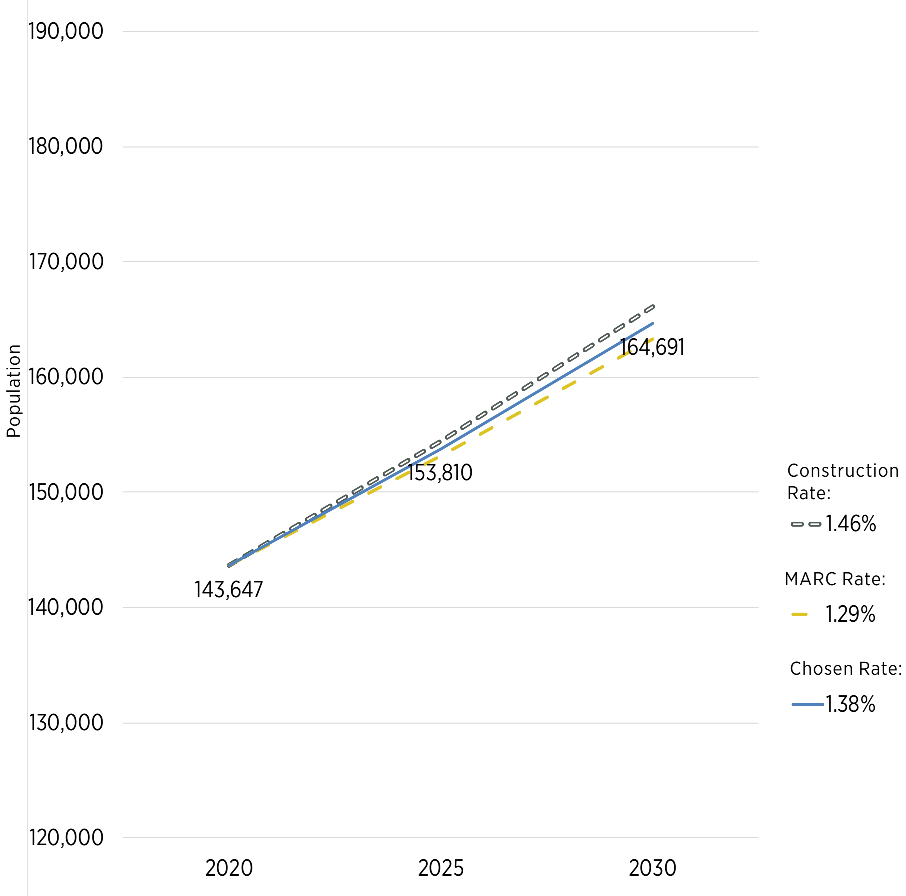


Source: American Community Survey (2018 5-year Estimates)

TEN-YEAR POPULATION FORECAST

Figure 4.11 shows population forecast scenarios through 2030. The growth rate of 1.29% is pulled from MARC projections. Although, the population based on residential units added since 2012 equals about a 1.46% rate. Therefore, planning for a growth rate in between, but trending toward recent construction activity at 1.38%, would result in population growth of nearly 31,000 residents.

FIGURE 4.11: POPULATION GROWTH FORECAST THROUGH 2030, OLATHE



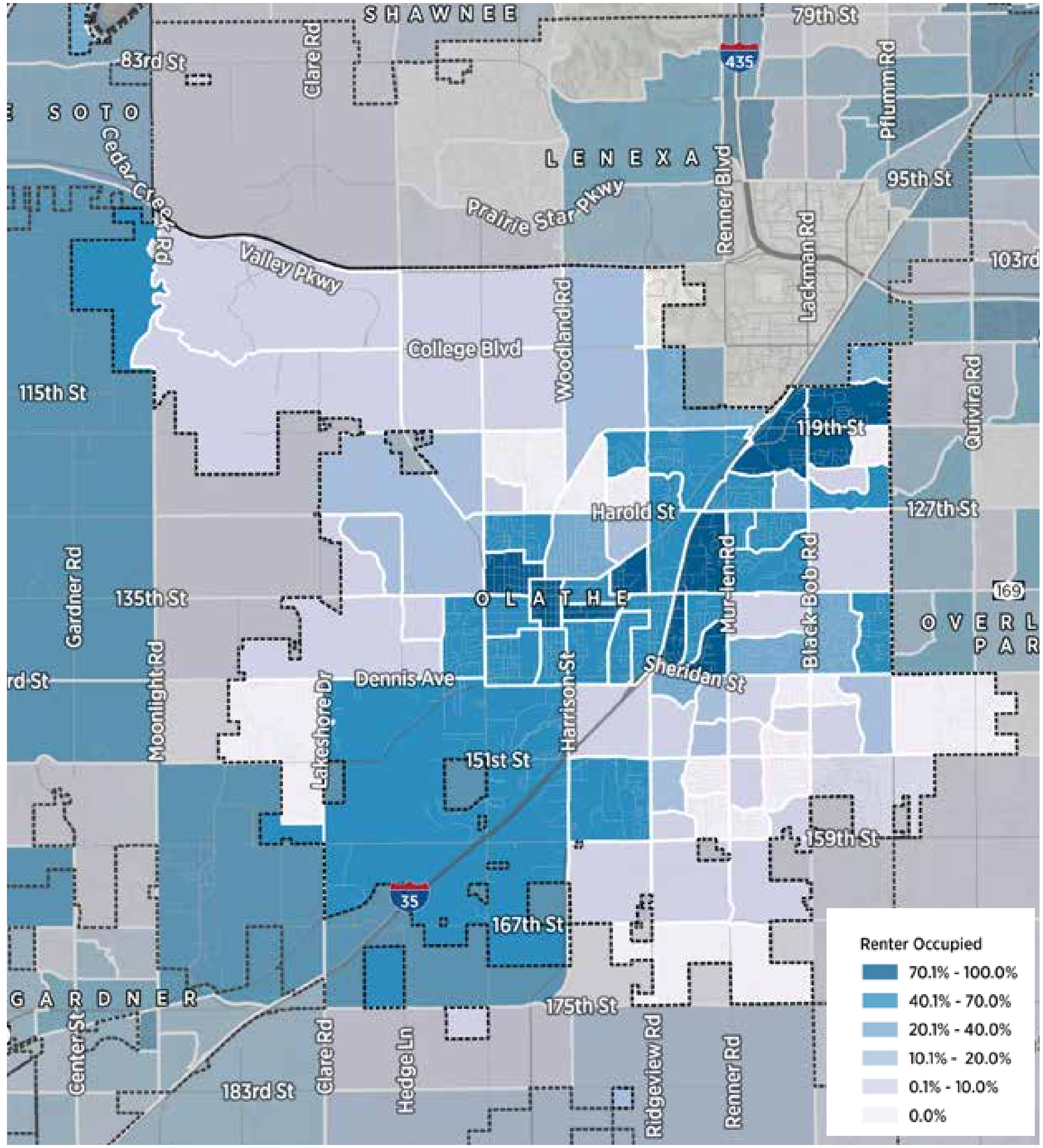
Source: U.S. Census; MARC; RDG Planning & Design

HOUSING OCCUPANCY

Map 4.10 shows the ratio of owners to renters across Olathe.

- Across the city about 71% of housing units are owner-occupied. This is about the same as in 2010.
- Vacancy rates are low citywide, down to just 2.6% in 2018 from 5% in 2010. A healthy market vacancy rate is around 6%.
- Household size is around 2.7 people per household, a higher rate than some other communities and indicative of some levels of affordability for families.

MAP 4.10: PERCENT RENTER OCCUPIED STRUCTURES, OLATHE



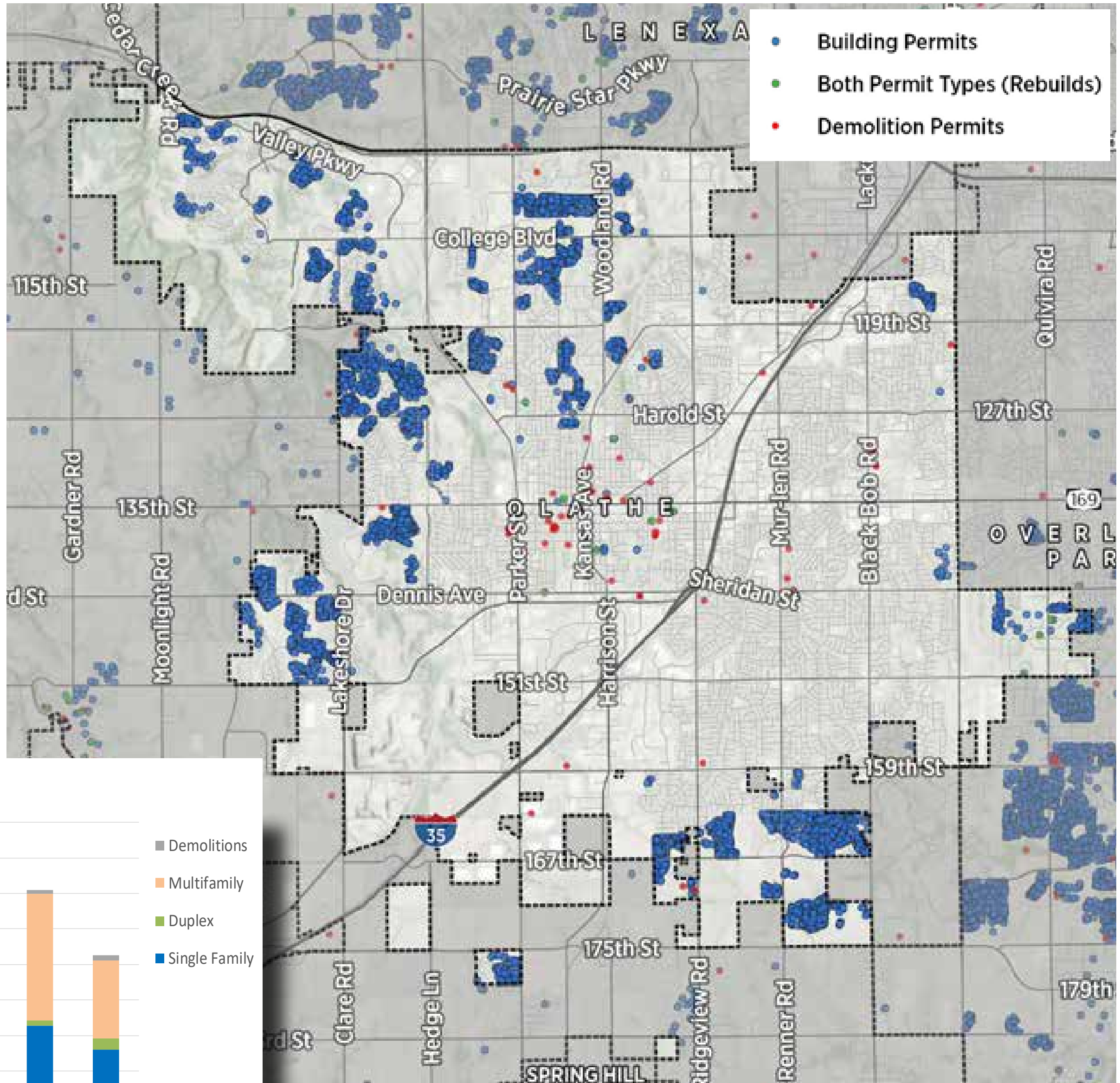
Source: American Community Survey (2018 5-year Estimates)

CONSTRUCTION ACTIVITY

Like many cities, residential construction activity continues to increase since the Great Recession. Considering the average household size, residential construction since 2010 would equate to a 1.27% annual growth rate, but increasing every year since 2010. **Map 4.11** shows the location of permits. Between 2010 and 2019:

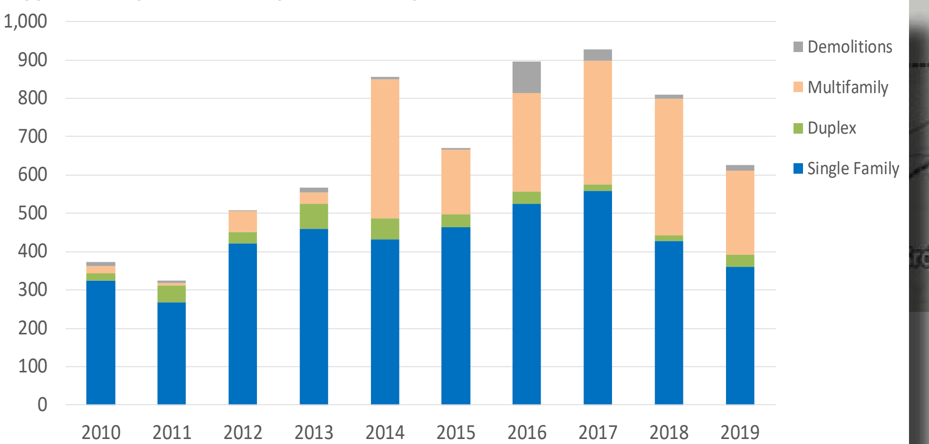
- About 66% of new units were single-family dwellings. The annual permits were varied with 2019 among the lowest years of new permits.
- About 33% of new units were multi-family units which include apartments, townhomes, and any structure with more than two units.
- Demolitions were relatively low, averaging 18 annually due largely to 83 and 29 demolitions in 2016 and 2017, respectively.

MAP 4.11: RESIDENTIAL NEW CONSTRUCTION PERMITS BY LOCATION (2010-2019), OLATHE



Source: Johnson County GIS Department

FIGURE 4.12: RESIDENTIAL DEVELOPMENT PERMITS BY YEAR



Source: City of Olathe

AGE OF HOUSING

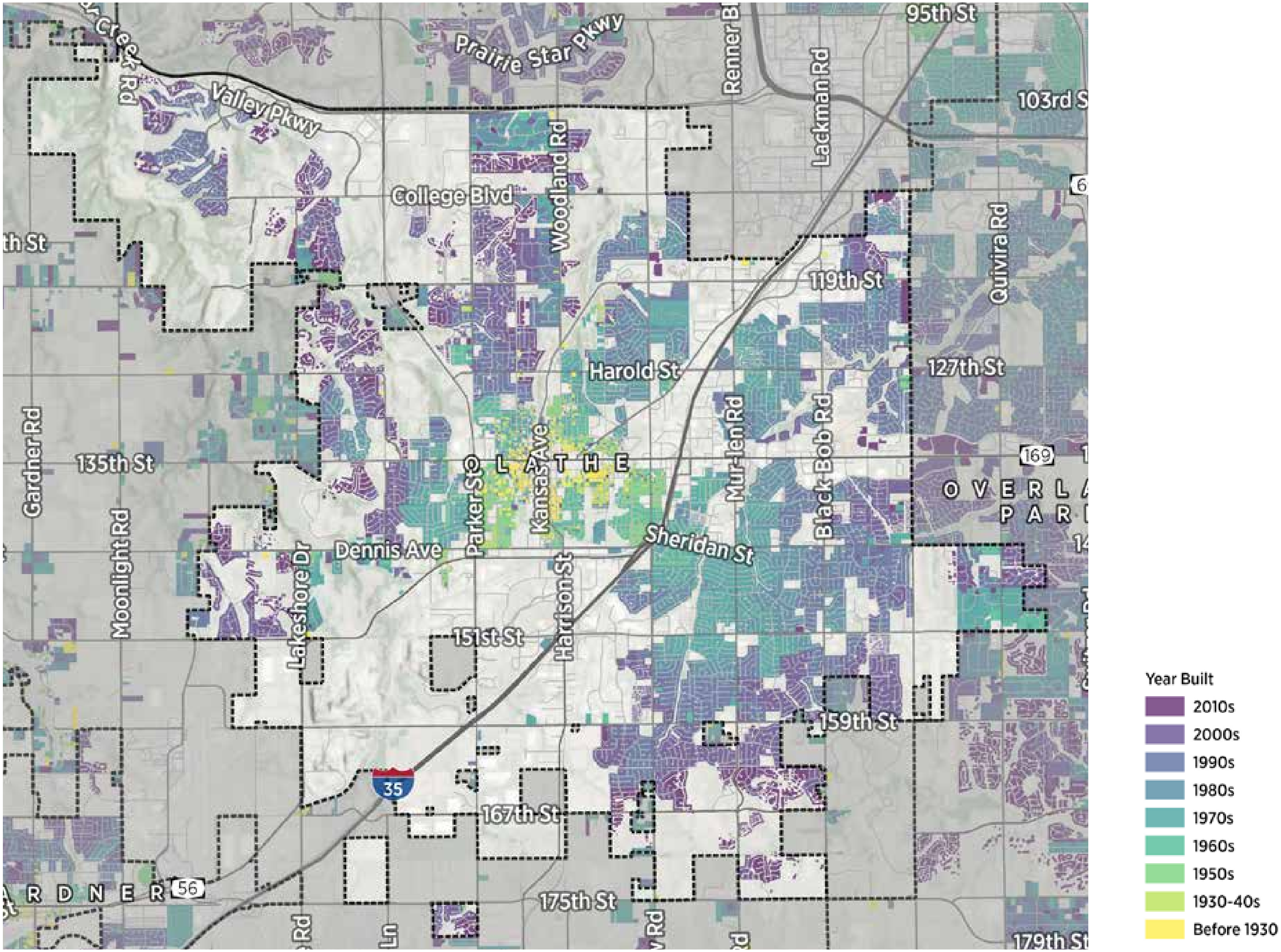
Map 4.12 shows the year built of residential dwellings. The age of housing provides preliminary insight into areas more susceptible to deterioration and additional homeowner costs. If these areas are also occupied by lower income households then monitoring of rehabilitation needs is even more important.

- Olathe has a varied housing stock. A large number of units surrounding downtown were constructed before 1930, with the newest units at the edge of the community in the northwest and southeast.
- Olathe has an older housing stock in the town center to monitor for rehabilitation and upkeep. Many of these homes are currently in stable condition and provide an attainable option for many households.

"We have plenty of lower-priced housing in older parts of Olathe, but it's very outdated at best, often all but falling apart...Seems like the people who could afford to buy up a place like that and remodel it are instead choosing to buy a new construction that doesn't need any work...."

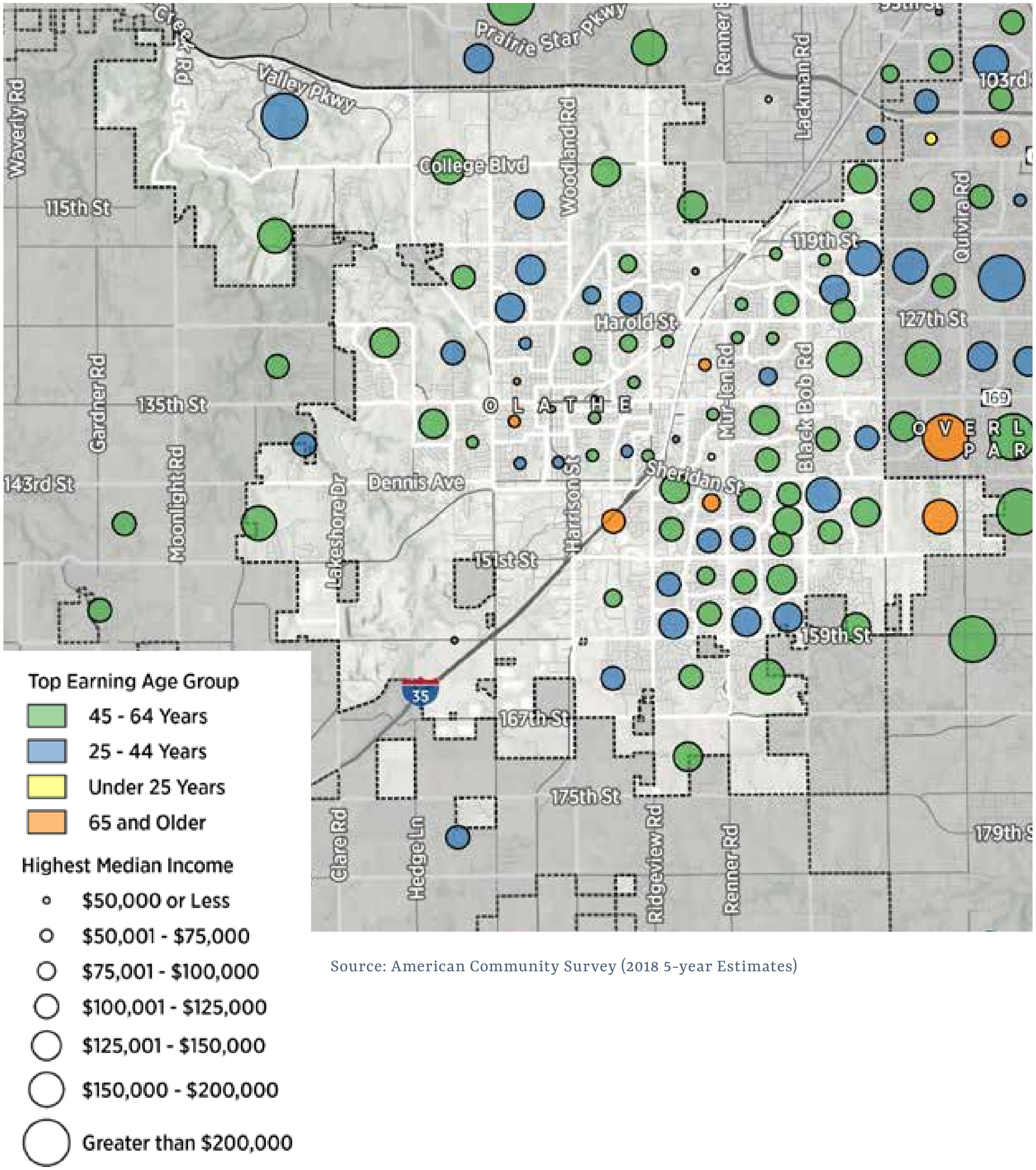
- Survey Respondent

MAP 4.12: AGE OF HOUSING STOCK, OLATHE



Source: Johnson County GIS Department, Assessor Data

MAP 4.13: HOUSEHOLD INCOME OF TOP EARNING AGE GROUP, OLATHE



Source: American Community Survey (2018 5-year Estimates)

HOUSEHOLD INCOME

Map 4.13 provides an overview of Olathe's estimated household incomes:

- Median household income is $85,318, up from $75,228 in 2010, or 14%. Compared to cities in Johnson County, Olathe is slightly above average for household incomes level.
- Higher incomes center around 45-64 year olds. Areas in the core around downtown have lower incomes, but a variety of age groups.
- The highest earning households tend to live in eastern and far northwestern Olathe.

"Olathe has the best mix of housing styles for all income levels in Johnson County."

- Survey Respondent

HOME SALES

How quickly homes sell in a market is a leading indicator of housing demand and supply. **Figure 4.13** shows single-family home sales data from 2017-2019. In Olathe, similar to other areas in the county:

- Average days on market have been declining along with number of houses sold. This correlates with listening session discussions that people may be staying in their homes longer and not finding options to move to.
- Average sales price has been increasing about $20,000 each year. This is above what is considered natural appreciation from inflation.

"I am currently renting. If I cannot find a house within my income level (purchase price under $150,000), I will have to leave Olathe and possibly Johnson County altogether."

- Survey Respondent

FIGURE 4.13: SINGLE FAMILY HOME SALES, OLATHE

Source: Multiple Listings Service (2017-2019)

HOUSING ATTAINABILITY AND SUPPLY ANALYSIS

By comparing the distribution of household incomes with housing costs, a picture of supply and demand emerges across all of Olathe's housing market. **Figure 4.14** examines supply and demand through the lens of what is "affordable" to different income groups to answer the question: is there an adequate supply of housing options available for residents of different income groups?

Figure 4.14 illustrates five major components in pursuit of the above story:

1. **Income Ranges.** The starting point of the analysis is the spectrum of incomes across all residents of Olathe. From these incomes, corresponding "affordable" housing prices are established for ownership and rental opportunities.
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3. **Affordability Ranges.** An affordable ownership home is calculated at 2-3 times the household income depending on the income range. Lower income households tend to spend a higher percentage of their income on housing and higher income households tend to spend a lower percentage of their total income on housing. An affordable rental would be about 20% of household income.
4. **Number of Housing Units in Each Affordability Range.** The number of housing units in each affordability range is the supply of affordable options.
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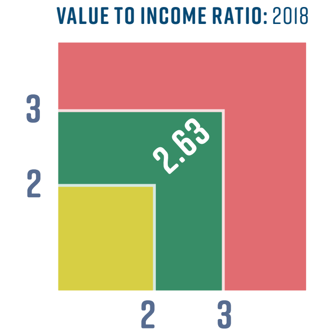
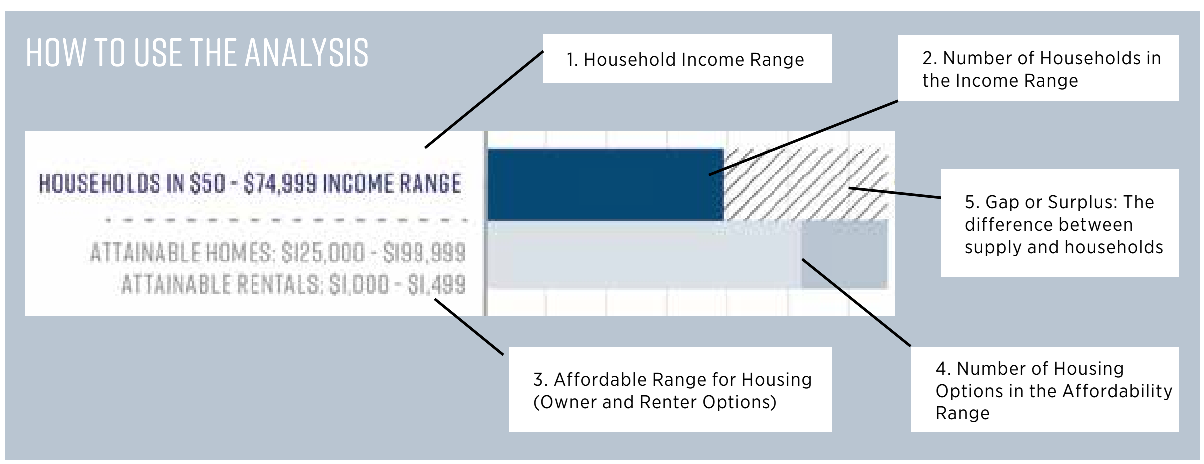
   - If the number of households exceeds the number of units available, those households must seek options in different affordability ranges.
   - If the number of units exceeds the number of households, it indicates that the units are occupied by households in different income ranges.
   - **This analysis is meant to illustrate larger trends in how existing units are being occupied. It does not demonstrate exact market demand in certain price ranges.**

VALUE TO INCOME BENCHMARK

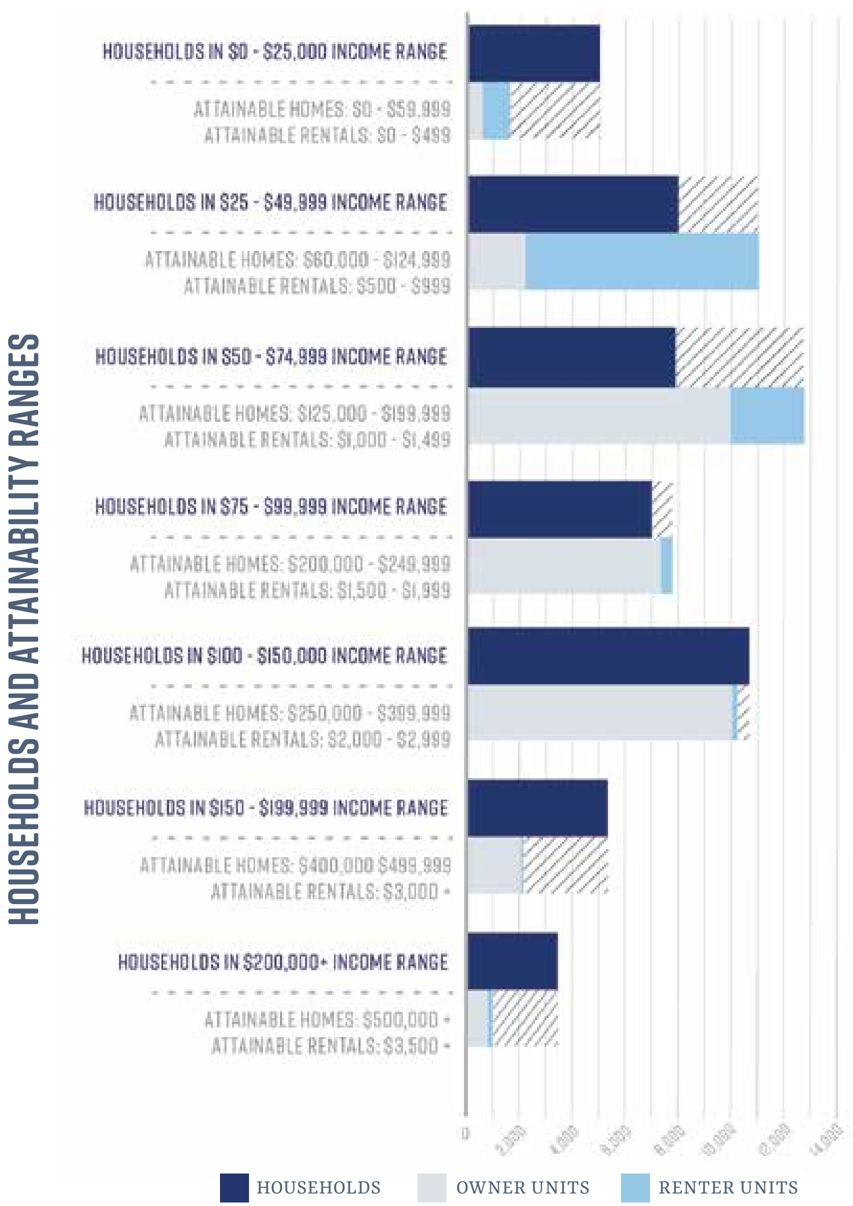


A healthy, self-sustaining housing market will have a value to income ratio between 2 and 3. Olathe's is 2.63, up from 2.57 in 2010.



The analysis in **Figure 4.14** is based on all the households today that are occupying a unit. No household is without a unit.

FIGURE 4.14: HOUSING ATTAINABILITY, OLATHE (2018)



Source: American Community Survey (2018 5-year Estimates); RDG Planning & Design

It appears there are many units available to households making between $25,000 and $75,000, these units are filled by higher income households and often unavailable to households in this income range.

- Some of these households include older households with low incomes but with homes owned outright. For example:
  - 19% of all owner-occupied households in Olathe are over the age of 65.
  - The median household income for households over 65 is estimated at $59,341, meaning that 50% of those households make less.
  - Additionally, 55% of owner-occupied households over the age of 65 do not have a mortgage.

- While it would appear that there are a good number of units available to households making between $25,000 and $75,000, these units are filled by higher income households and often unavailable to households in this income range.
  - Based on conversations with realtors and other stakeholders, it is expected that many of the homes in this range see competition from this income bracket and higher income households.

- There is a balance of units for households making between $75,000 and $150,000. However, these households are also competing with a share of households in higher income households for lower cost housing. Builders continues to produce housing for this market and above.

- More than half of the households earning more than $150K fill units attainable to lower income households thus creating a shortage of housing units for many first-time home buyers and those looking to step up from their first home.

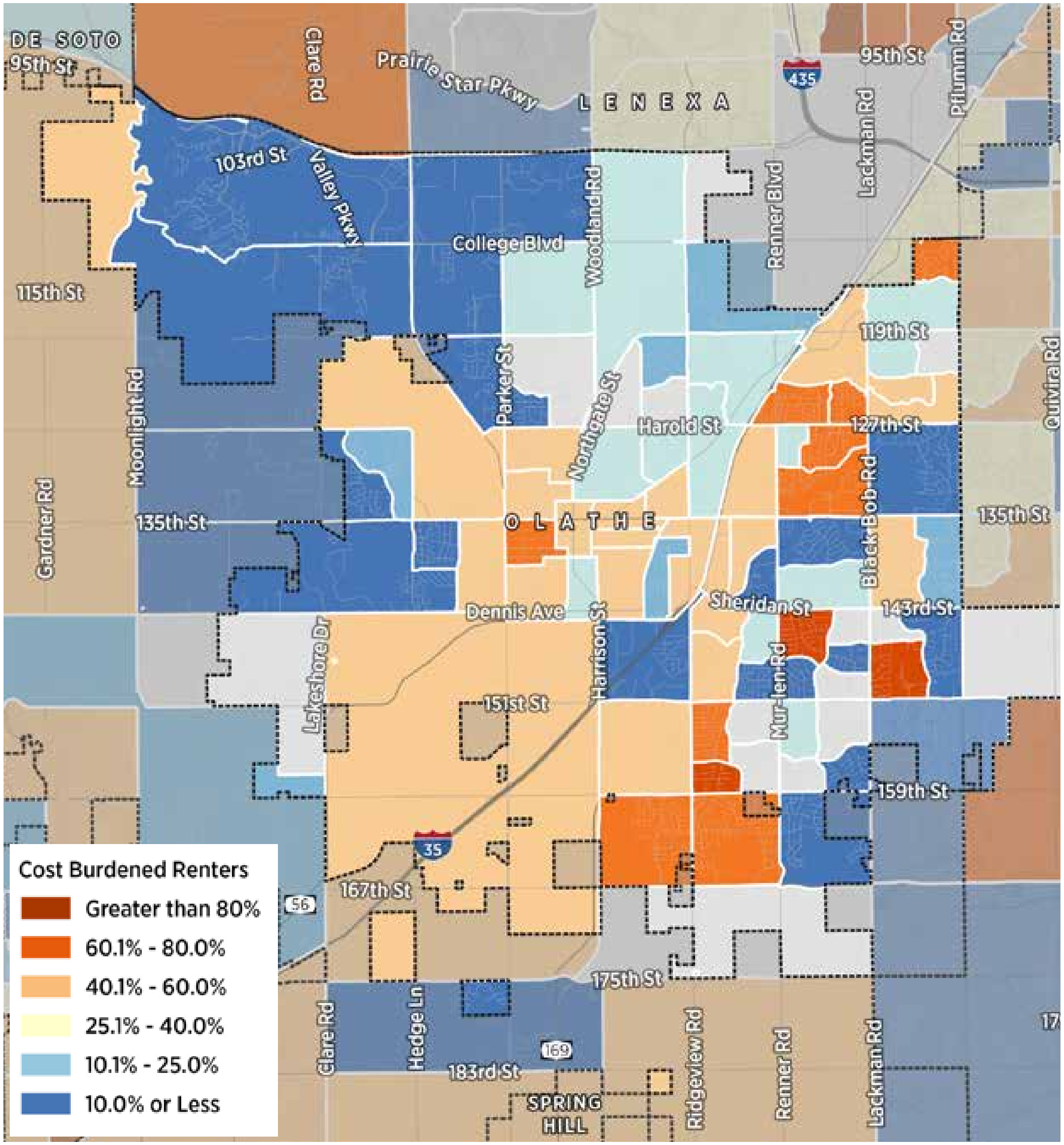
- Over 8,000 households making over $100,000 a year are living in owner-occupied units priced below $250,000.
  - They do this for a variety of reasons, including housing cost and neighborhood preferences but also fewer options at higher prices.

COST BURDENED RESIDENTS

Map 4.14 and **4.15** illustrates the level of cost-burdened households. According to the U.S. Census, households spending more than 30% of their income on housing are considered cost-burdened. However, this may be conservative for Johnson County as other expenses like transportation costs can be disproportionately higher for lower income households.

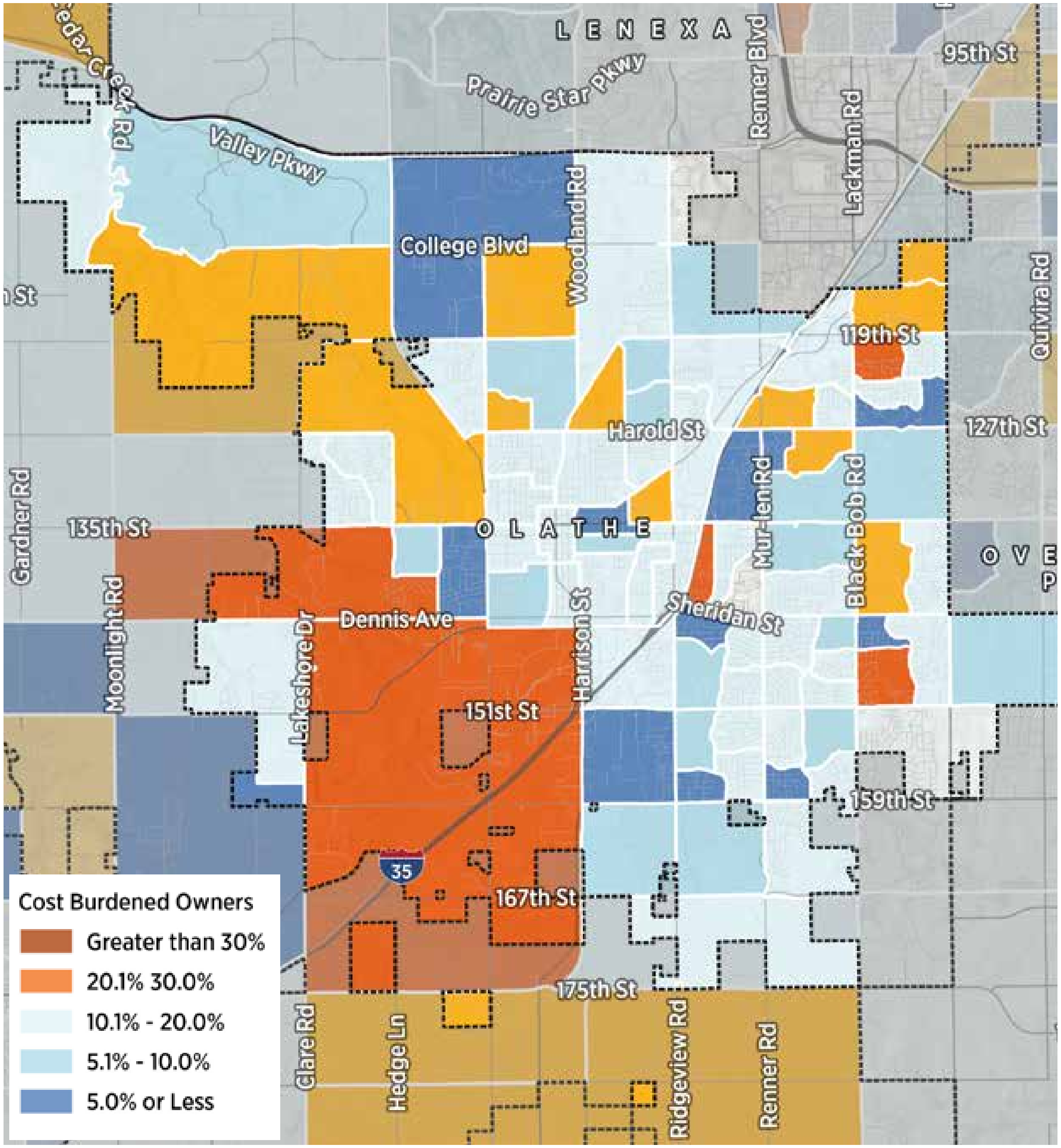
- Median contract rents are below average for Johnson County at $796, up from $678 in 2010.
- Approximately 47% of Olathe's households living in renter housing spend more than 30% of their income on gross rent.
- Low rental supply, and thus a competitive market, often results in higher rental prices. Olathe has experienced strong recent growth in the number of rental units, which traditionally demand more rent than older units. Adding units to the market should create market pressures on older units to adjust rates downward or hold steady to their age and quality.
- The shaded areas on Map 4.14 are Census boundaries. Large areas of one shade do not indicate these areas have a lot of residential housing.
  - For example, the area south of Dennis Avenue in Olathe is mostly industrial uses. While the area is a large portion of Olathe's land areas, its residential population is marginal.

MAP 4.14: PERCENT OF RENTER-OCCUPIED COST BURDENED HOUSEHOLDS, OLATHE



Source: American Community Survey (2018 5-year Estimates)

MAP 4.15: PERCENT OF OWNER-OCCUPIED COST BURDENED HOUSEHOLDS, OLATHE



Source: American Community Survey (2018 5-year Estimates)

- Median home values ($224,000) are slightly below average for Johnson County communities despite rising 15% since 2010.
- About 18% of households living in owner-occupied housing spend more than 30% of their income on housing.
- Like the previous map, the shaded areas are Census boundaries. Large areas of one shade do not indicate these areas have a lot of residential housing.
  - For example, the area south of Dennis Avenue in Olathe is mostly industrial uses. While the area is a large portion of Olathe's land areas, its residential population is marginal.

"Generally speaking, housing in Olathe is too expensive for many people, even those employed full time."

- Survey Respondent

HOUSING DEMAND

The housing demand analysis builds on the population projections, housing trends, and community conversations to forecast the demand for additional housing. The model is built on the following assumptions with a 1.38% growth rate. The primary benefit of a demand forecast is to understand needs at different price points and household incomes. The method uses:

- The proportion of the household population (those living in households and not in dorms, skilled nursing, or prisons) will remain stable through 2030.
- Average people per household is expected to remain constant over the next decade. Some growth may occur as Millennials move into their childbearing years, but Baby Boomer households will also continue to shrink.
- Unit demand at the end of the period is calculated by dividing household population by the number of people per household. This equals the number of occupied housing units.
- A manageable housing vacancy provides housing choices for residents moving to the community. As noted earlier, the county's rate is slightly high but likely reflects the point in time that it was gathered. Olathe shows a low vacancy rate in 2018. This should increase as new units get brought online.
- Unit needs at the end of each period are based on the actual household demand plus the number of projected vacant units.

FIGURE 4.15: HOUSING DEMAND MODEL, OLATHE

	2020	2025	2030	TOTAL
POPULATION AT END OF PERIOD	143,647	153,810	164,691	
HOUSEHOLD POPULATION AT END OF PERIOD	142,029	152,077	162,836	
AVERAGE PEOPLE PER HOUSEHOLD	2.80	2.80	2.80	
HOUSEHOLD DEMAND AT END OF PERIOD	50,725	54,313	58,156	
PROJECTED VACANCY RATE	3.0%	4.0%	5.0%	
UNIT NEEDS AT END OF PERIOD	52,293	56,576	61,216	
REPLACEMENT NEED (TOTAL LOST UNITS)		50	50	100
CUMULATIVE NEED DURING PERIOD		4,333	4,690	9,023
AVERAGE ANNUAL CONSTRUCTION		867	938	902

Source: RDG Planning & Design

- Replacement need is the number of housing units demolished or converted to other uses. Homes in poor condition or obsolete should be gradually replaced in a city's housing supply. The number of units lost annually is based on historic demolition rates but may decrease over time as the worst units in the downtown core are removed and proactive rehabilitation prevents further demolitions.
- Cumulative need shows the number of total units needed between the base year of 2020 and the year indicated at the end of the period.

Figure 4.15 shows an average annual construction need of 902 units. The net average annual construction rate from 2009 to 2019 was 591 units, with a high of 870 units in 2017 and a low of 296 in 2009. Although the net average was 749 since 2014. This rate of construction appears to have just met the demand with very few vacancies and options for those entering the market. Low supply can often create inflation, thus increasing production should support growth but also support a healthier, stable market.

DEVELOPMENT PROGRAM

Building on the housing demand model, the development program forecasts production targets for owner- and renter-occupied units based on the following assumptions:

- Owner-occupied units will be distributed roughly in proportion to the income distributions of the households for whom owner occupancy is an appropriate strategy.
- Most low-income residents will be accommodated in rental units.
- The county's supply is currently dominated by owner units (72%). Over the last several years, a large portion of new units have been a rental configuration or condos. Over the next ten years, production levels need to balance to provide the housing variety necessary for changing demographics. Therefore, the model illustrated in **Figure 4.16** targets a split of 60% owner- and 40% renter-occupied units.
    - › Approximately 2,938 additional owner-occupied units should be priced below $250,000. This demand will come through the city's existing housing stock being freed up through move-up housing for households in higher income brackets, or products that do not fit the traditional detached single-family homes.
    - › Nearly 1,688 rental units will need to be produced with rents under $1,000 per month. These units will be generated through both the private market and programs like low-income housing tax credits.

FIGURE 4.16: HOUSING DEVELOPMENT PROGRAM, OLATHE

	2025		2030		2020-2030	
TOTAL OWNER OCCUPIED						
ATTAINABLE: <$200,000	981	2,600	1,062	2,814	2,043	5,414
MODERATE MARKET: $200-250,000	430		465		895	
MARKET: $250-350,000	660		714		1,374	
HIGH MARKET: OVER $350,000	529		572		1,101	
TOTAL RENTER OCCUPIED						
ATTAINABLE: LESS THAN $1,000	811	1,733	877	1,876	1,688	3,609
MARKET: $1,000-1,500	487		527		1,013	
HIGH MARKET: $1,500+	436		472		908	
TOTAL NEED		4,333		4,690		9,023

Source: RDG Planning & Design

COMMUNITY PERCEPTIONS

SURVEY

A total of 949 residents of Olathe took the community survey made available online and in paper form. From their responses the following themes emerged:

- Housing types perceived likely to be successful are those already present–mid-size, 3 bedroom homes and small 2-3 bedroom homes. 68% of respondents also felt independent senior living would be successful.
- Respondents felt the housing supply in Olathe was less successful at meeting the needs of single professionals than in Johnson County as a whole.
  - The housing supply is not seen overall as meeting the needs for multi-generational families, people with physical and/or mental disabilities, students, low wage workers, and households needing access to transit, as shown in **Figure 4.17**.
- When asked about solutions to reduce housing costs in Johnson County, the highest ranking suggestion was downpayment assistance to owners. Receiving less than 15% support were premanufactured or modular housing and construction financing assistance to builders. This is likely because the benefits to individuals are not direct.
- Just over half of respondents looked to move within the past three years, 41% to an owner-occupied unit and 12% to a rental.
  - For those looking for owner units, a shortage was perceived for units under $200,000.
  - For rental units, no apparent shortage emerged.

FIGURE 4.18: DECISION TO MOVE IN PAST 3 YEARS

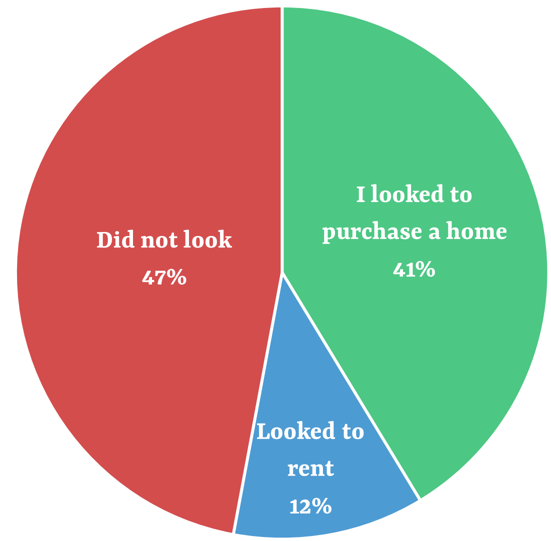
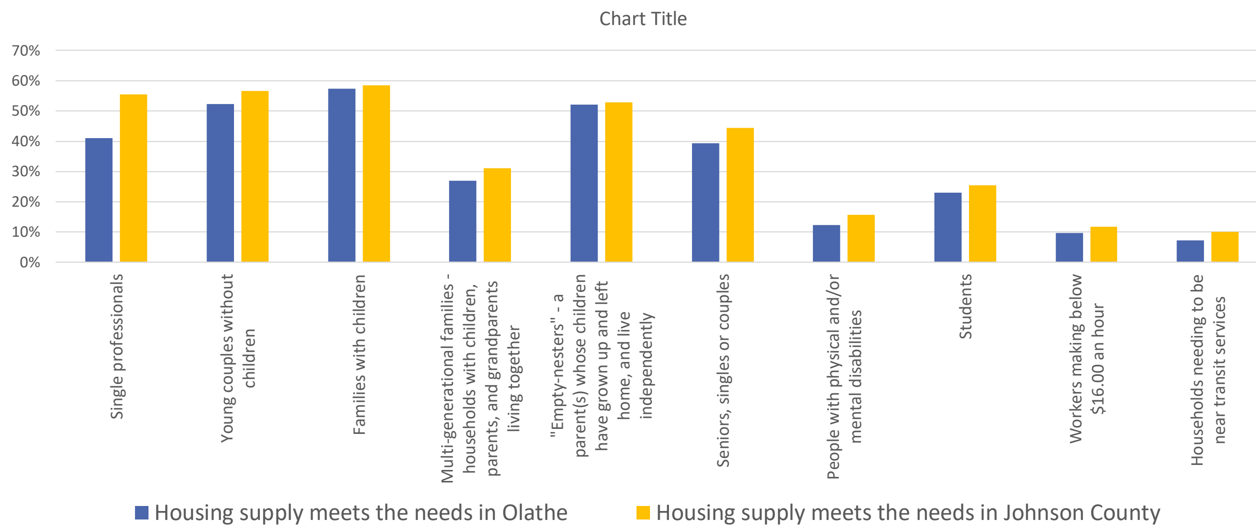


FIGURE 4.17: HOUSING SUPPLY CURRENTLY MEETS THE NEEDS OF THE FOLLOWING HOUSEHOLD TYPES



LISTENING SESSIONS

Many people familiar with the housing market specific to Olathe participated in small group discussions. These included representatives from the City Council, Planning Commission, Olathe public schools, real estate agents with experience in all of Johnson County, county-wide developers, landlords with property in Olathe, and Olathe residents. .

COMMON COMMENTS

Aside from common themes in Chapter 2 that pertain to the entire county, several common themes are apparent to Olathe.

- Many express the impact of Olathe's loan repair program and feelings that it appears to have worked.
- Schools have an increasing population of students with transportation and homelessness issues. Additionally, several on staff cannot afford to live in Olathe.
- For multi-family architectural standards, Olathe may have difficult requirements compared to other cities. Some developers feel the requirements are difficult in regards to architectural standards.
- Olathe does have a decent supply of starter homes. However, homes are becoming more and more difficult to serve entry level buyers, those making under $20 an hour.
- People tend to see improvements in dilapidated housing and do not see demolition of blighted housing as necessary as perhaps it once was.

FIGURE 4.19: HOUSING TYPES LIKELY TO BE SUCCESSFUL IN THE CITY

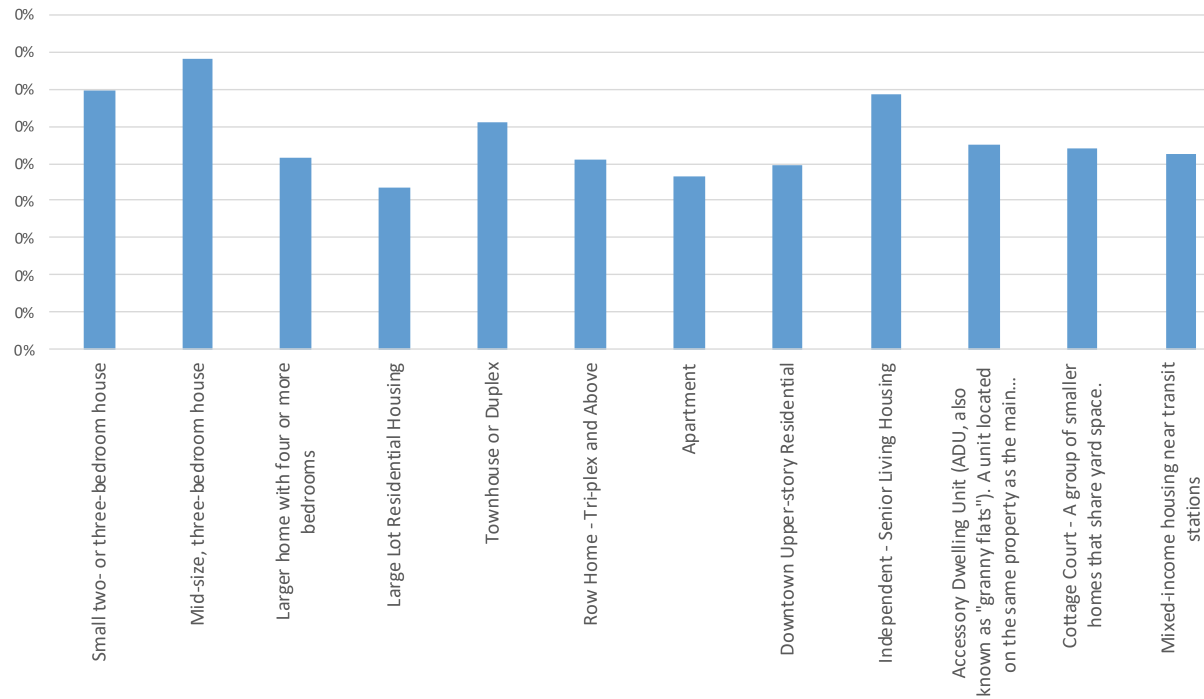
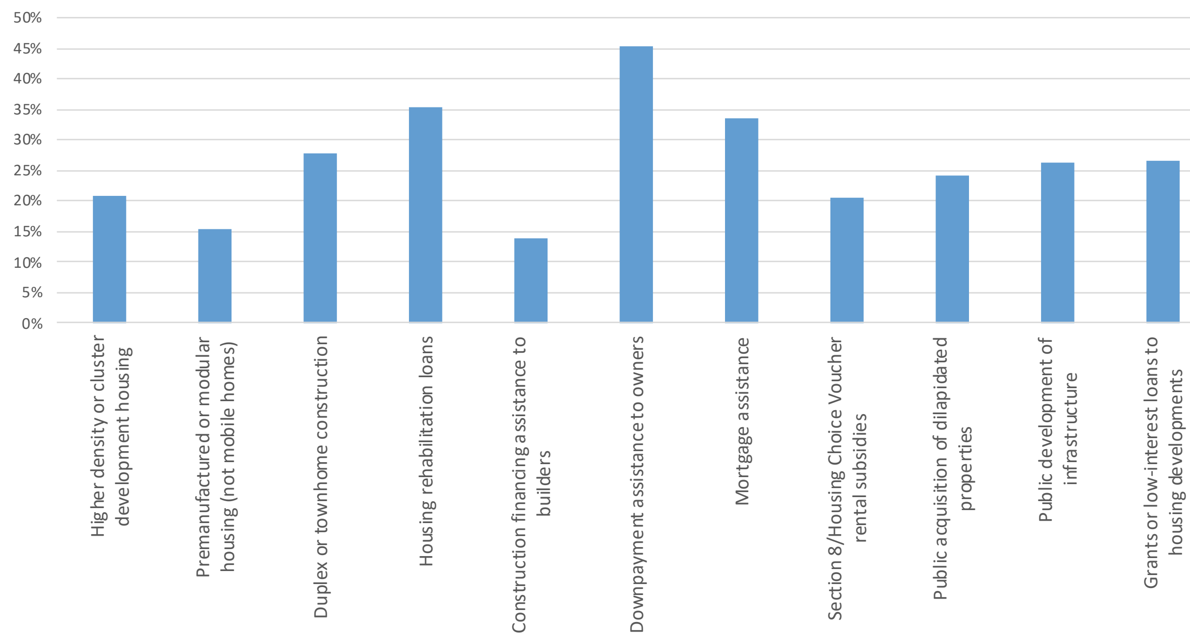


FIGURE4.20: HOUSING SOLUTIONS SUPPORT TO REDUCE HOUSING COSTS IN JOHNSON COUNTY



SHAWNEE

Shawnee is the third largest city in Johnson County, bounded on the west and north by the Kansas River. There are a variety of different housing types in the city with varying characteristics. However, a high percentage of the housing stock is in single-family detached units. There is a limited amount of highly suitable development land within current city limits. However, Shawnee still has more growth potential than many of the cities in Johnson County.

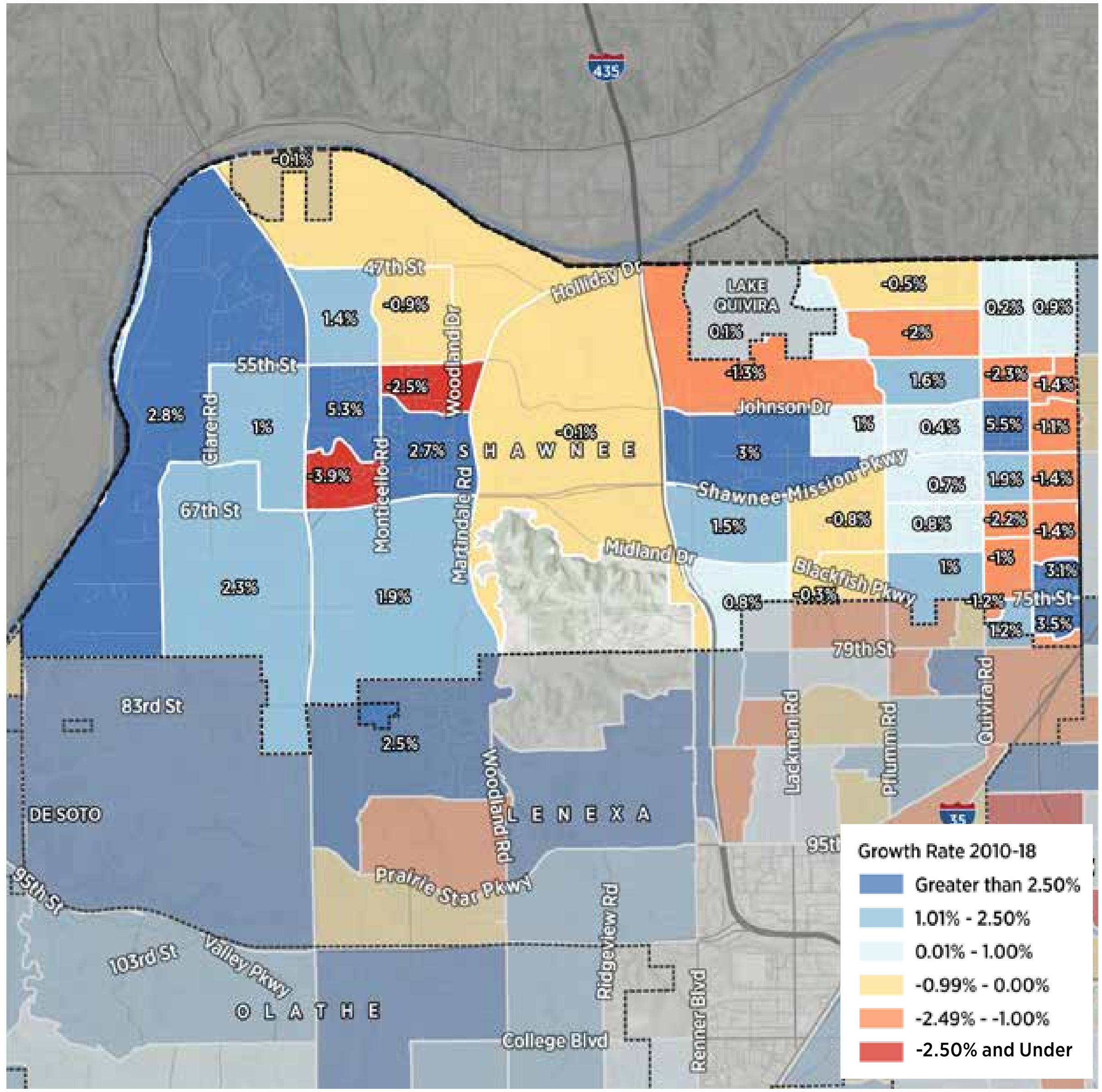
POPULATION CHANGE

Population in Shawnee continues to grow with the highest decade change occurring between 1960 and 1970 (131%). Growth will likely continue in the west where land still remains to be developed, shown in Map 4.16.

GROWTH ANALYSIS

Shawnee has seen steady annual growth rates of around 2.5% since 1980. Despite an annual growth rate of only 0.6% between 2010 and the estimated 2018 population, trend and market forces indicate that Shawnee will continue to grow at an average annual rate just above 1% as other areas in the county become built out.

MAP4.16: POPULATION GROWTH RATE 2010-2018 BY BLOCK GROUP, SHAWNEE



Source: American Community Survey (2018 5-year Estimates)

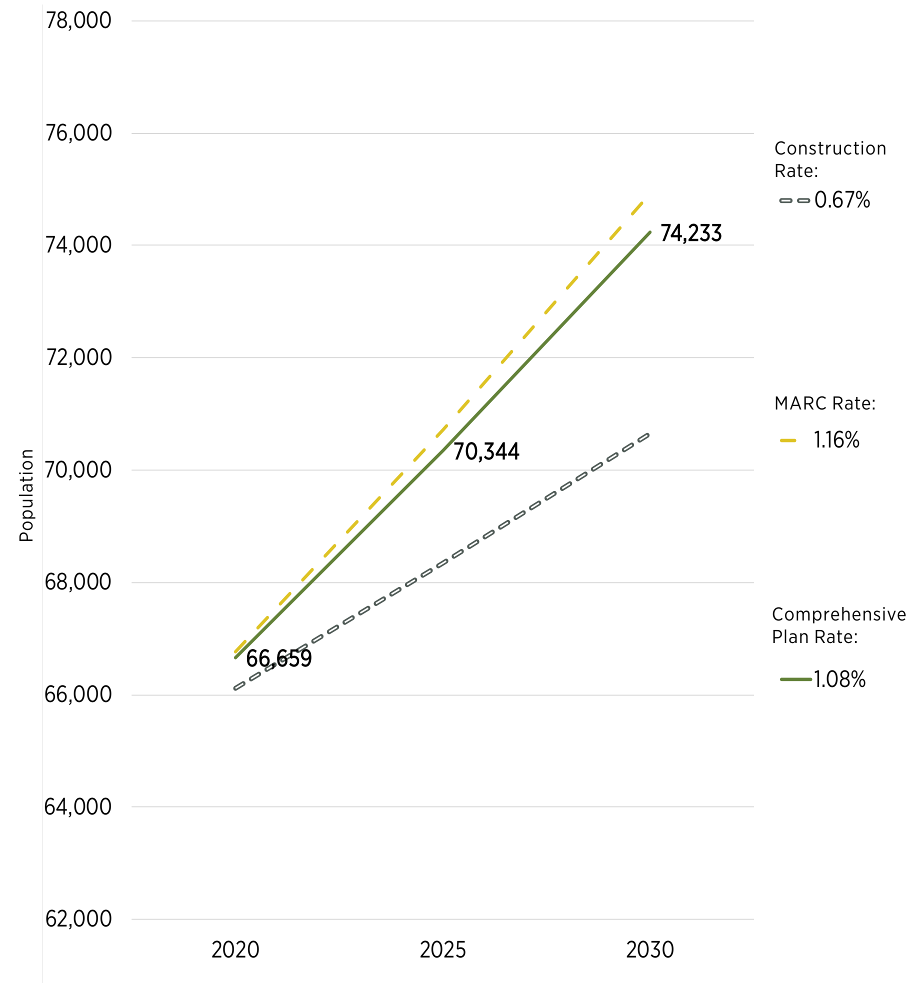
TEN-YEAR POPULATION FORECAST

Figure 4.21 shows population forecast scenarios through 2030. The rates of 1.16% and 1.08% are pulled from MARC and the city comprehensive plan, respectively. If population growth matched the current construction rate between 2010 and 2019, Shawnee would only grow at a 0.67% annual rate. The growth scenario uses the rate determined in the city comprehensive plan, leading to a 2030 population of 74,233 residents.

"It's important to keep housing affordable, but we also want to see this area be more desirable for young couples and families. Downtown Shawnee (Nieman Now project as a whole) has improved a lot of features over the years to make the area desirable but housing around it needs to follow"

- Survey Respondent

FIGURE 4.21: POPULATION GROWTH SCENARIOS, SHAWNEE



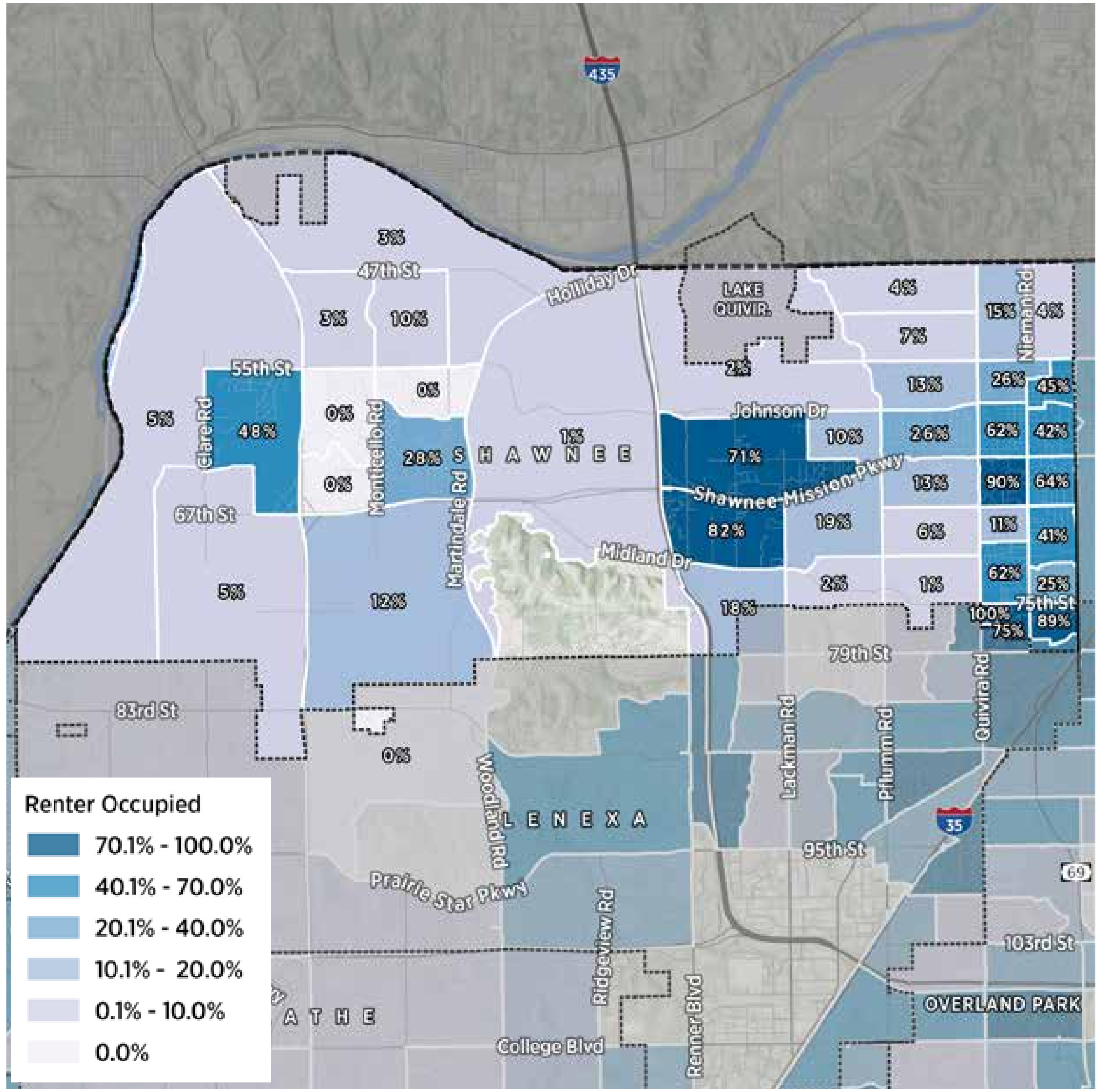
Source: U.S. Census; MARC; RDG Planning & Design

HOUSING OCCUPANCY

Map 4.17 shows the percent of renter-occupied structures in Shawnee.

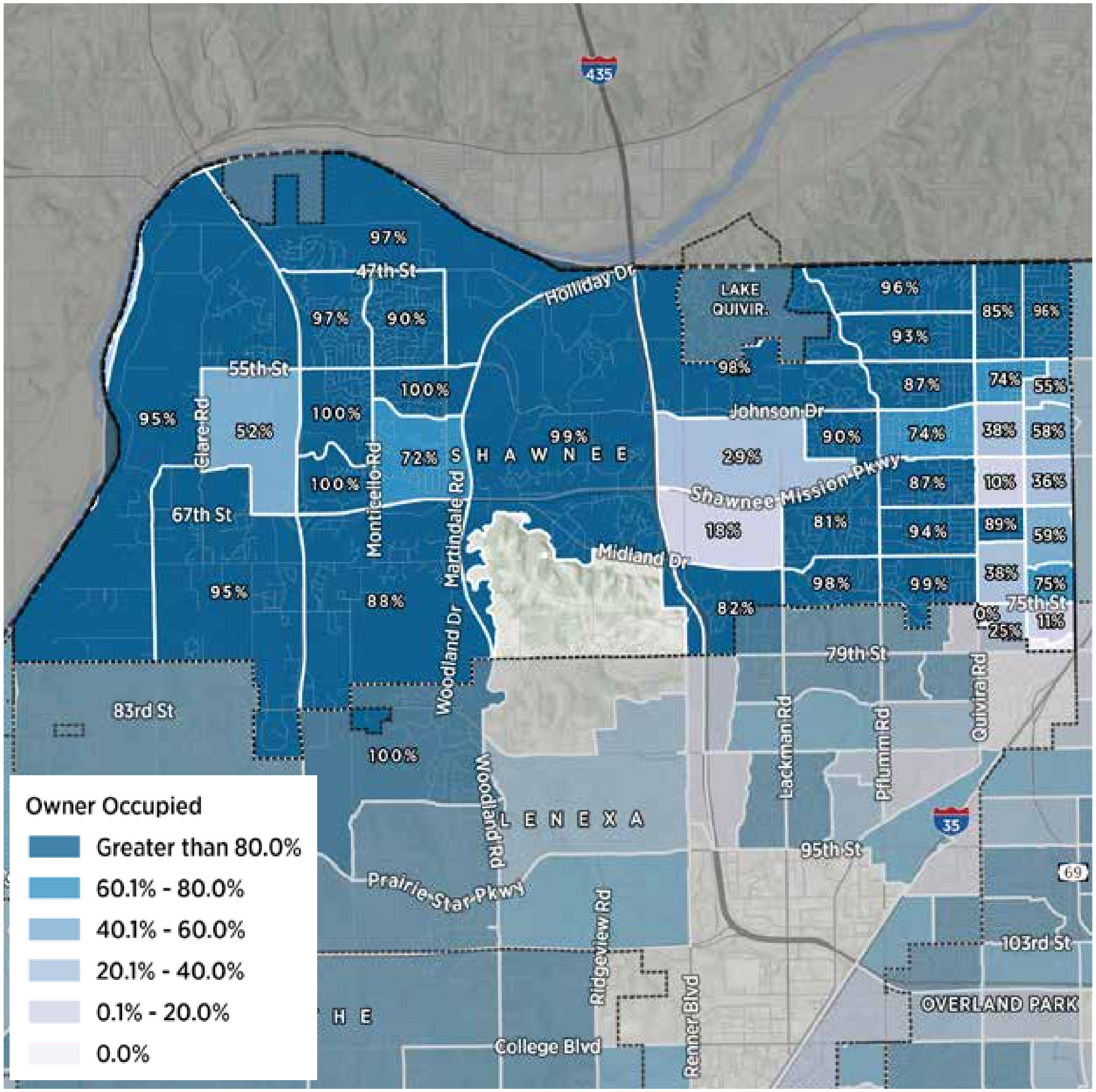
- Vacancy rates are quite stable citywide, between about 3% and 5% from 2000-2018, albeit a little low. A healthy market vacancy rate is around 6%.
- Household size is around 2.6 people per household, which is higher than many cities in Johnson County.
- Renter occupancy tends to cluster at major transportation spines (I-35, I-435, and Highway 7).

MAP 4.17: PERCENT RENTER OCCUPIED STRUCTURES, SHAWNEE



Source: American Community Survey (2018 5-year Estimates)

MAP 4.18: PERCENT OWNER OCCUPIED STRUCTURES, SHAWNEE



Source: American Community Survey (2018 5-year Estimates)

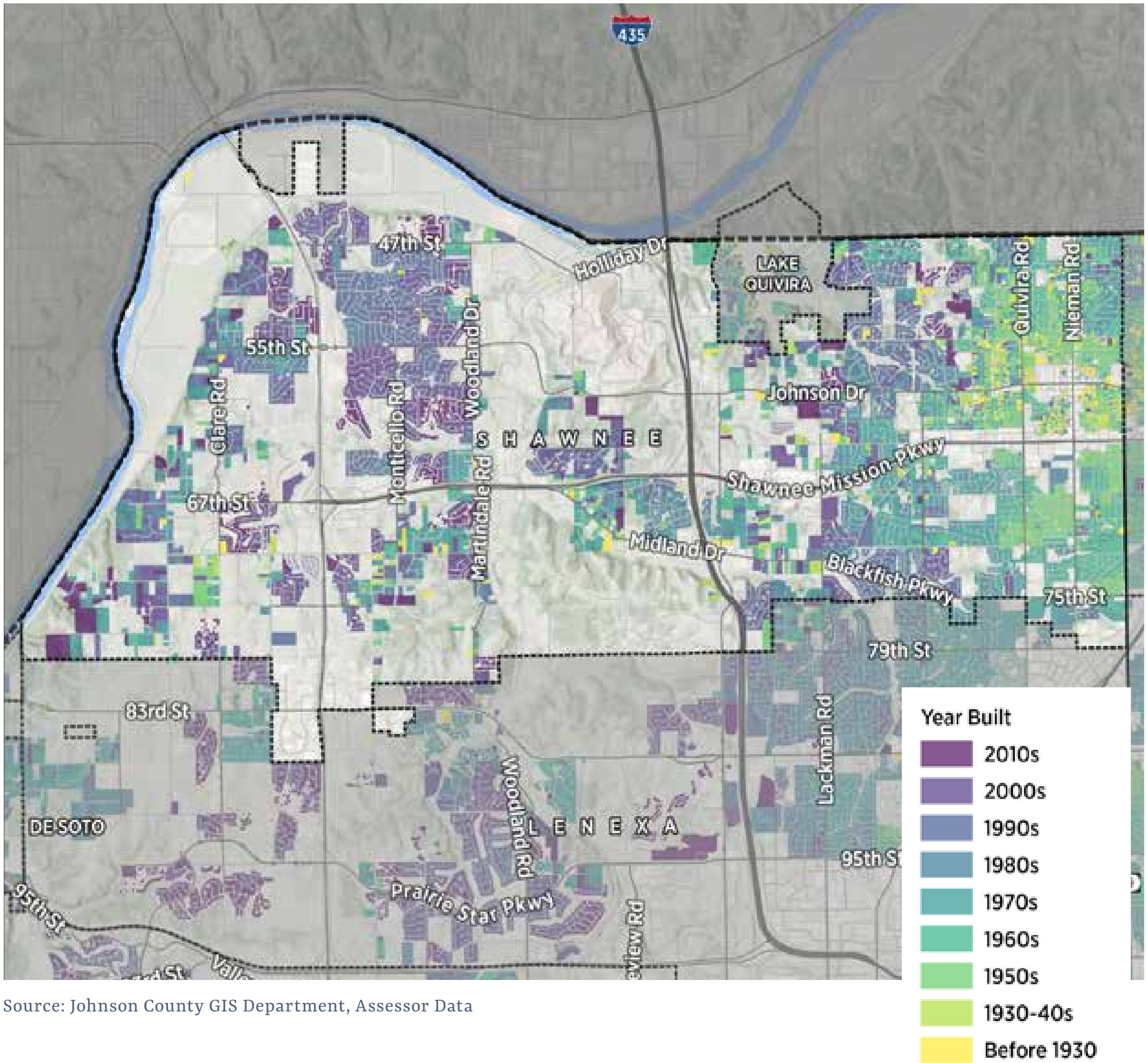
Map 4.18 shows the percent of owner-occupied structures in Shawnee.

- Across the city about 73% of housing units are owner-occupied, about the same percentage as 2010.
- Nearly all development in the western portions of the city is owner-occupied. If left on this trend, there will be a significant gap in rental options near future jobs and services.

"There are very few ranch style homes or other retirement home options in the Johnson County area....specifically Lenexa, Shawnee, Merriam areas."

- Survey Respondent

MAP 4.19: AGE OF HOUSING STOCK, SHAWNEE



Source: Johnson County GIS Department, Assessor Data

AGE OF HOUSING

Map 4.19 shows the year built of residential dwellings. The age of housing provides preliminary insight into areas more susceptible to deterioration and additional homeowner costs. If these areas are also occupied by lower income households then monitoring of rehabilitation needs is even more important.

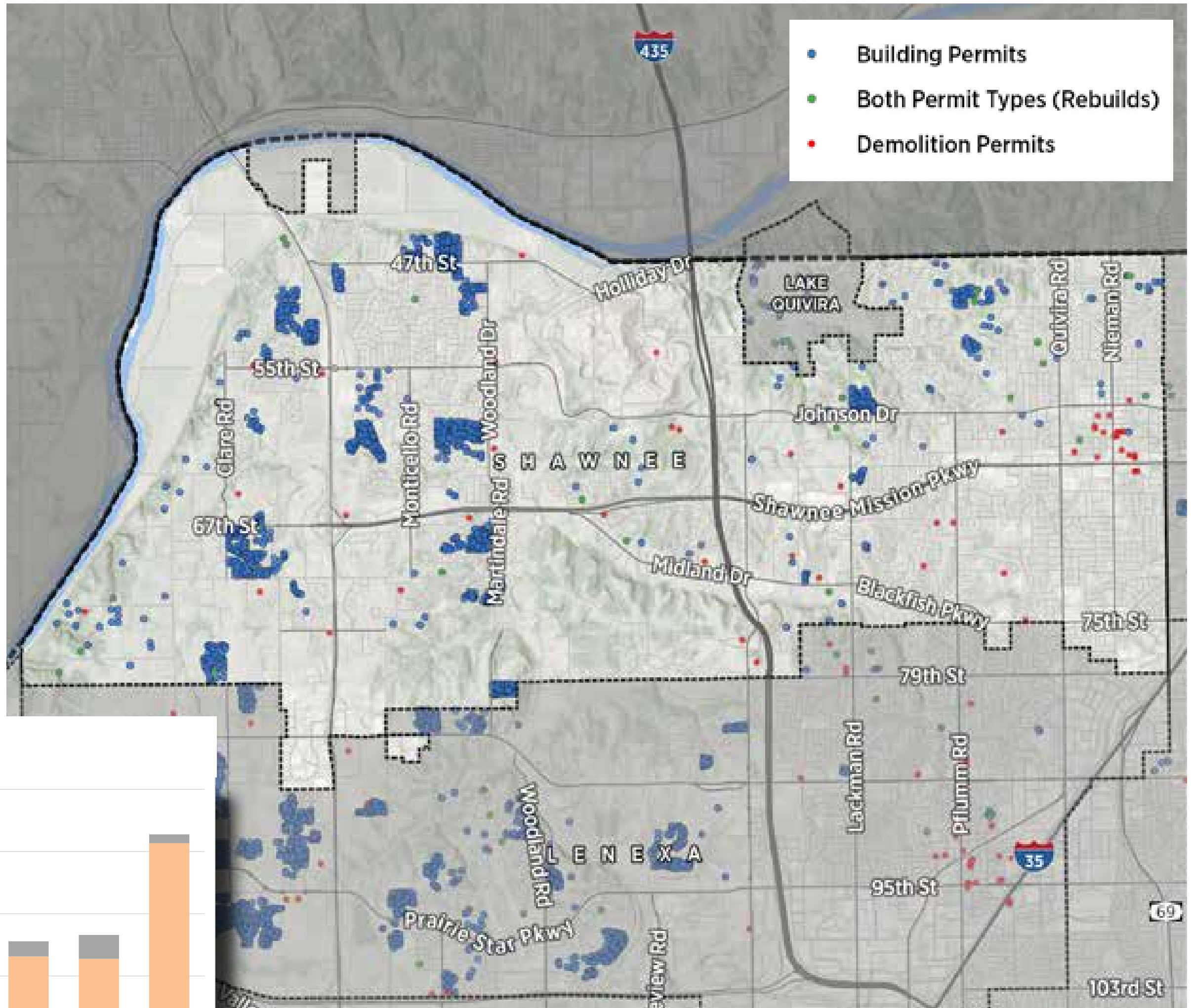
- Shawnee's housing stock is relatively new (42% built between 1990 and 2010), especially in areas on the west side of the city. Homes in the northeast were primarily constructed before 1950.
- Few homes were built before 1950 at about 12%. These are the homes typically in the most need of repairs and at risk of falling into dilapidation. There are some programs in Shawnee for assistance, mostly lead by non-profit groups. Listening session discussion indicated that many people living in older homes are older adults and the elderly.

CONSTRUCTION ACTIVITY

Like many cities, residential construction activity continues to increase since the Great Recession. **Map 4.20** shows the location of residential permits. Between 2009 and 2019:

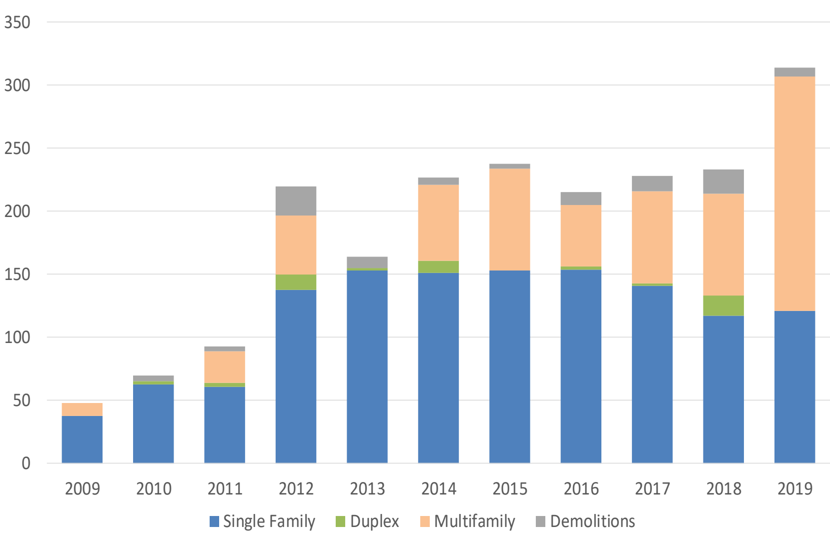
- About 66% of new units were single-family dwellings. Construction of single-family dwellings was highest between 2013 and 2017, but in the past few years has dropped.
- About 31% of new units were multi-family units, which include apartments, townhomes, and any structure with more than two units.
- Demolitions averaged about 9 per year, with a the most occurring in 2012, likely in preparation for new development or damage by fire.

MAP 4.20: RESIDENTIAL NEW CONSTRUCTION PERMITS BY LOCATION (2010-2019), SHAWNEE



Source: Johnson County GIS Department

FIGURE 4.22: RESIDENTIAL DEVELOPMENT PERMITS BY YEAR



Source: City of Shawnee

HOME SALES

How quickly homes sell in a market is a leading indicator of housing demand and supply. **Figure 4.23** shows home sales data from 2017-2019. In Shawnee, similar to other areas in the county:

- Sales price is increasing annually more than inflation, while the number of units sold is decreasing, but only slightly.
- The market in 2018 saw an increase in the average days on market. However, this dropped again in 2019 to match that of 2017 levels. Homes sell quickly.

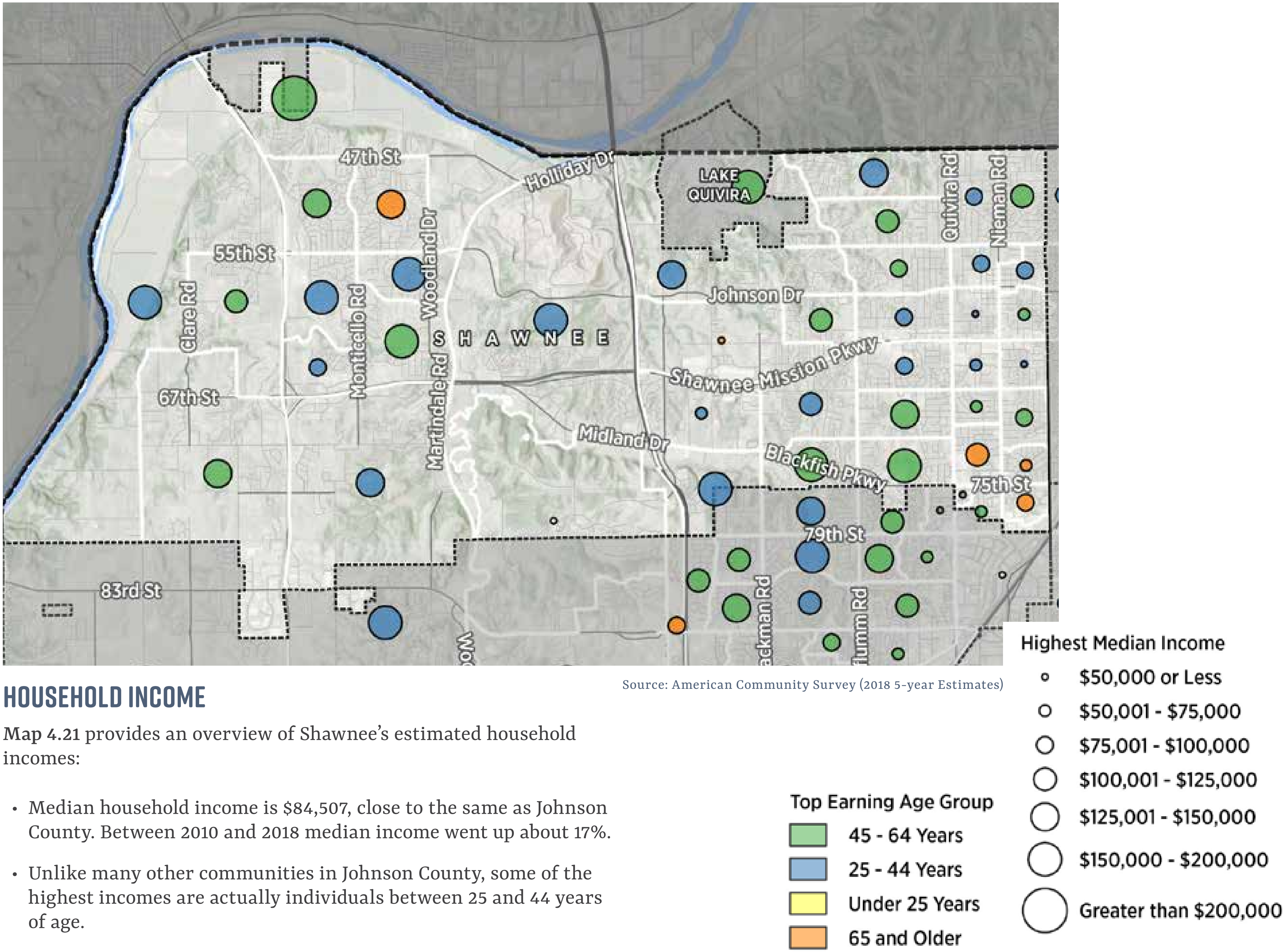
"I know at least several young people who have to live with their parents because they can't afford housing here... I've had many friends downsizing to complexes where some maintenance is provided."

- Survey Respondent

FIGURE 4.23: SINGLE FAMILY HOME SALES, SHAWNEE

Source: Multiple Listings Service (2017-2019)

MAP 4.21: HOUSEHOLD INCOME OF TOP EARNING AGE GROUP, SHAWNEE



Source: American Community Survey (2018 5-year Estimates)

HOUSEHOLD INCOME

Map 4.21 provides an overview of Shawnee's estimated household incomes:

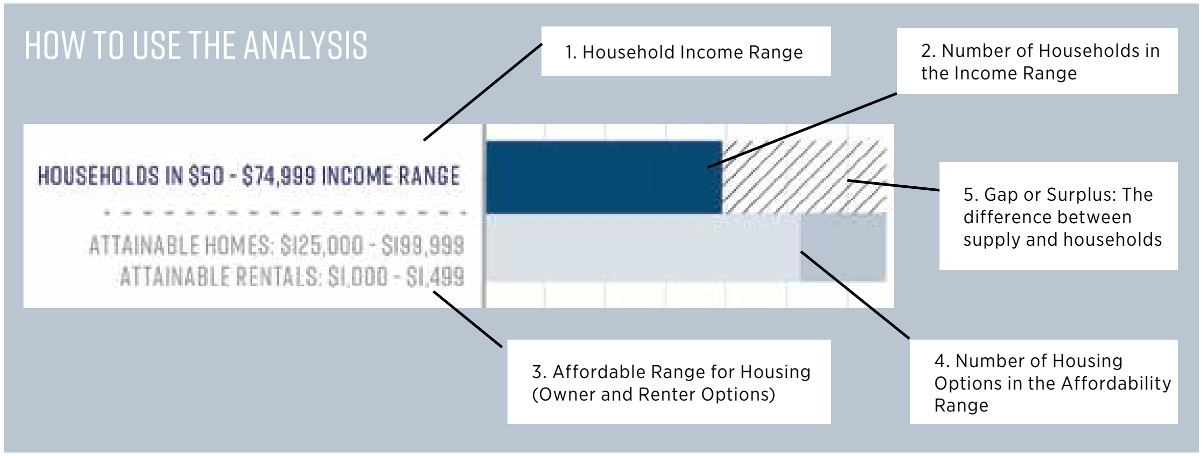
- Median household income is $84,507, close to the same as Johnson County. Between 2010 and 2018 median income went up about 17%.
- Unlike many other communities in Johnson County, some of the highest incomes are actually individuals between 25 and 44 years of age.

HOUSING ATTAINABILITY AND SUPPLY ANALYSIS

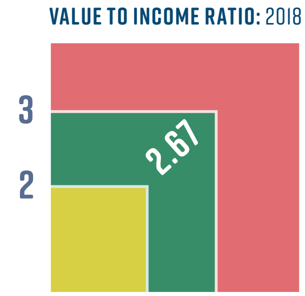
By comparing the distribution of household incomes with housing costs, a picture of supply and demand emerges across all of Shawnee's housing market. **Figure 4.24** examines supply and demand through the lens of what is "affordable" to different income groups to answer the question: is there an adequate supply of housing options available for residents of different income groups?

Figure 4.24 illustrates five major components in pursuit of the above story:

1. **Income Ranges.** The starting point of the analysis is the spectrum of incomes across all residents of Shawnee. From these incomes, corresponding "affordable" housing prices are established for ownership and rental opportunities.
2. **Number of Households in Each Income Range.** The number of households in each income range is the demand; these residents seek housing options in Shawnee that are affordable to them.
3. **Affordability Ranges.** An affordable ownership home is calculated at 2-3 times the household income depending on the income range. Lower income households tend to spend a higher percentage of their income on housing and higher income households tend to spend a lower percentage of their total income on housing. An affordable rental would be about 20% of household income.
4. **Number of Housing Units in Each Affordability Range.** The number of housing units in each affordability range is the supply of affordable options.
   - Composition of Housing Supply. This illustrates the share of the supply met by ownership and renter housing options.
5. **The Balance of Supply and Demand.**
   - If the number of households exceeds the number of units available, those households must seek options in different affordability ranges.
   - If the number of units exceeds the number of households, it indicates that the units are occupied by households in different income ranges.
   - **This analysis is meant to illustrate larger trends in how existing units are being occupied. It does not demonstrate exact market demand in certain price ranges.**



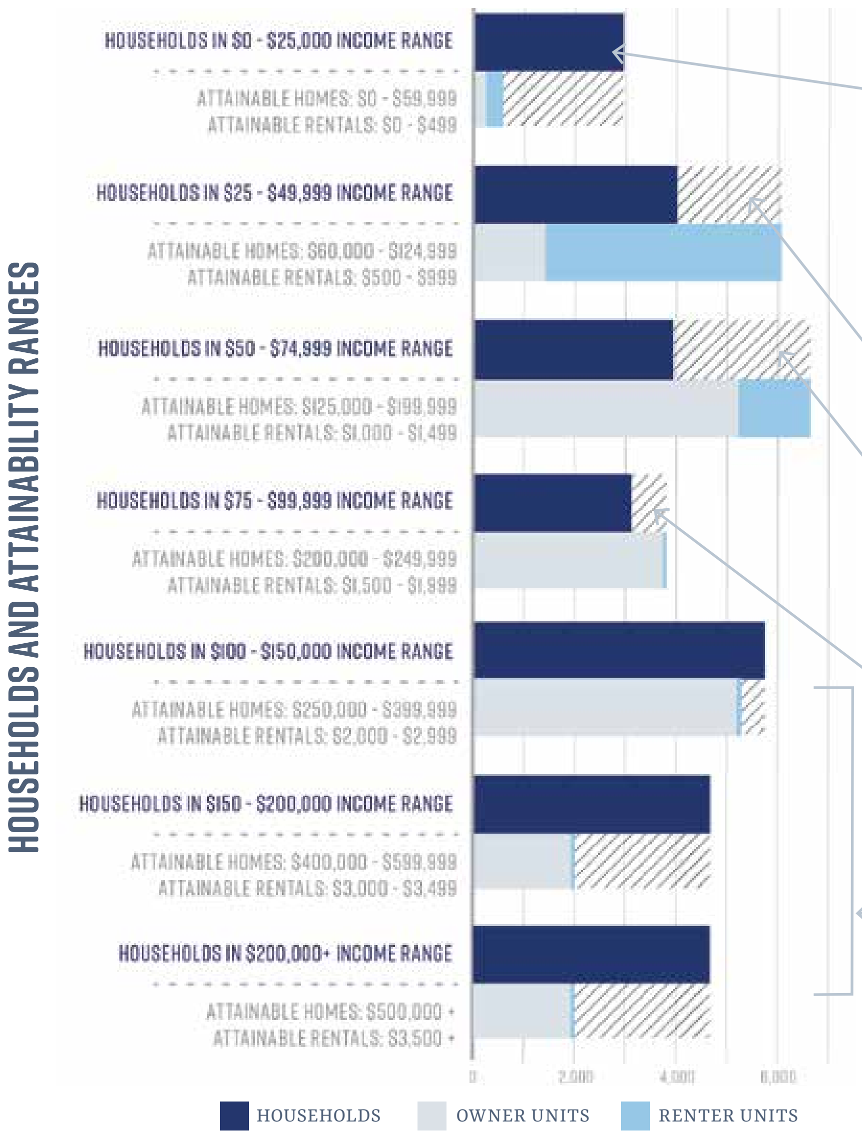
VALUE TO INCOME BENCHMARK



A healthy, self-sustaining housing market will have a value to income ratio between 2 and 3. Shawnee has a value to income ratio of 2.67, which is lower than the value of 2.75 in 2010. This does not mean it is attainable to everyone, but broadly for current residents in Shawnee.

The analysis in **Figure 4.24** is based on all the households today that are occupying a unit. No household is without a unit.

FIGURE 4.24: HOUSING ATTAINABILITY, SHAWNEE (2018)



Source: American Community Survey (2018 5-year Estimates); RDG Planning & Design

Shawnee has a large number of higher income households filling housing units that would be affordable to households making less than $100,000

- Many of these households often occupy homes well above their incomes when owned outright. For example:
  - 29% of all owner-occupied households in Shawnee are over the age of 65.
  - The median household income for households over 65 is estimated at $49,000, meaning that 50% of those households make less than $50,000.
  - Additionally, 57% of owner-occupied households over the age of 65 do not have a mortgage.

- Fewer households than affordable options. These units are filled by lower income households.

- Shawnee has a supply of ownership options priced between $125,000 and $200,000 but without other options these units are filled by retirees and households making over $75,000 per year.

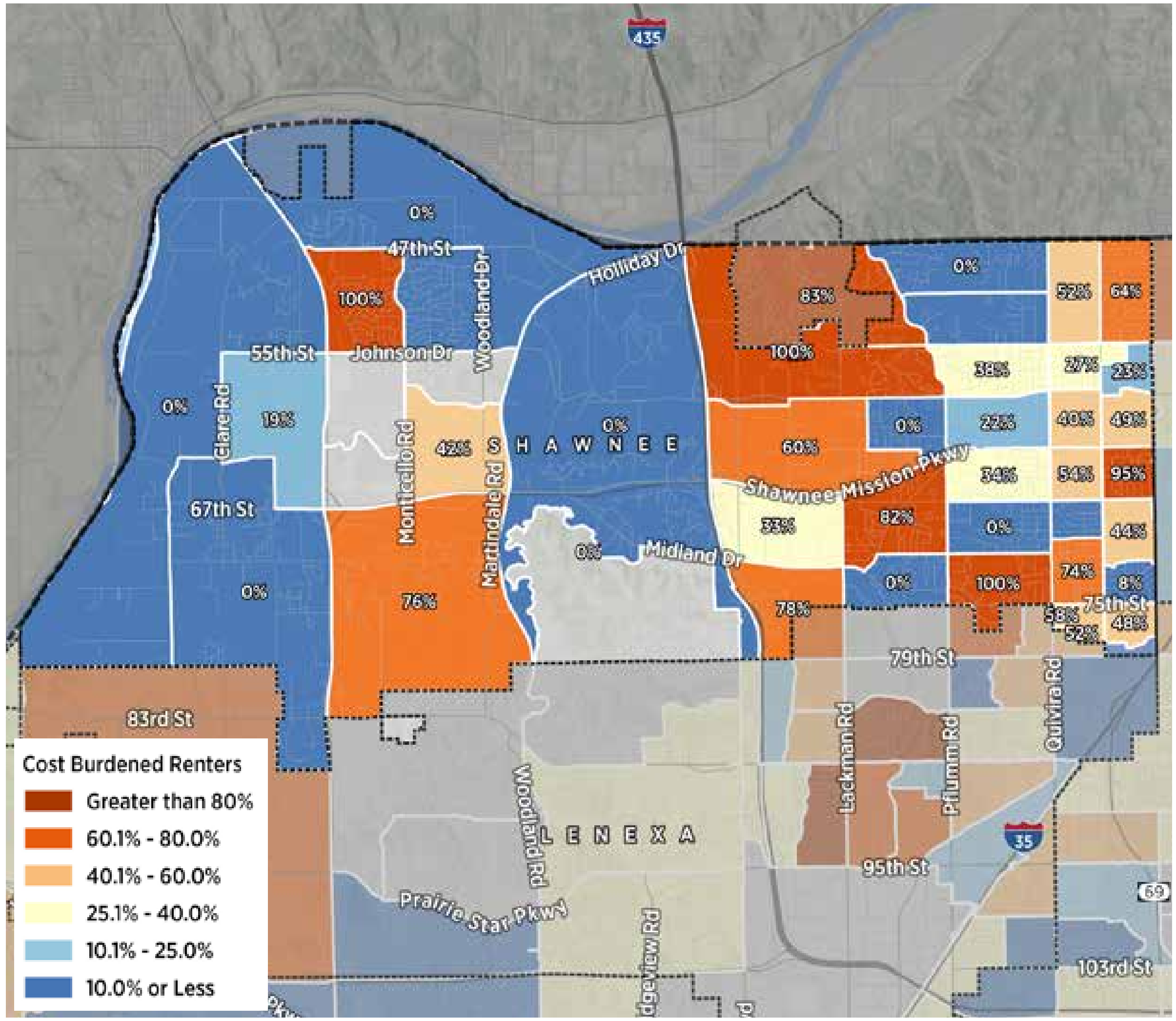
- There are fewer households than affordable options. Many units in this range see competition from upper income brackets.

- Over 3,000 households making over $100,000 a year are living in owner-occupied units priced below $250,000.
- They do this for a variety of reasons, including housing cost and neighborhood preferences in addition to a lack of other options above this price range.

Maps 4.22 and 4.23 illustrate the level of cost-burdened households. According to the U.S. Government, households spending more than 30% of their income on housing are considered cost-burdened. However, this may be conservative for Shawnee as other expenses like transportation costs can be disproportionately higher for lower income households that use transit or do not have access to transit.

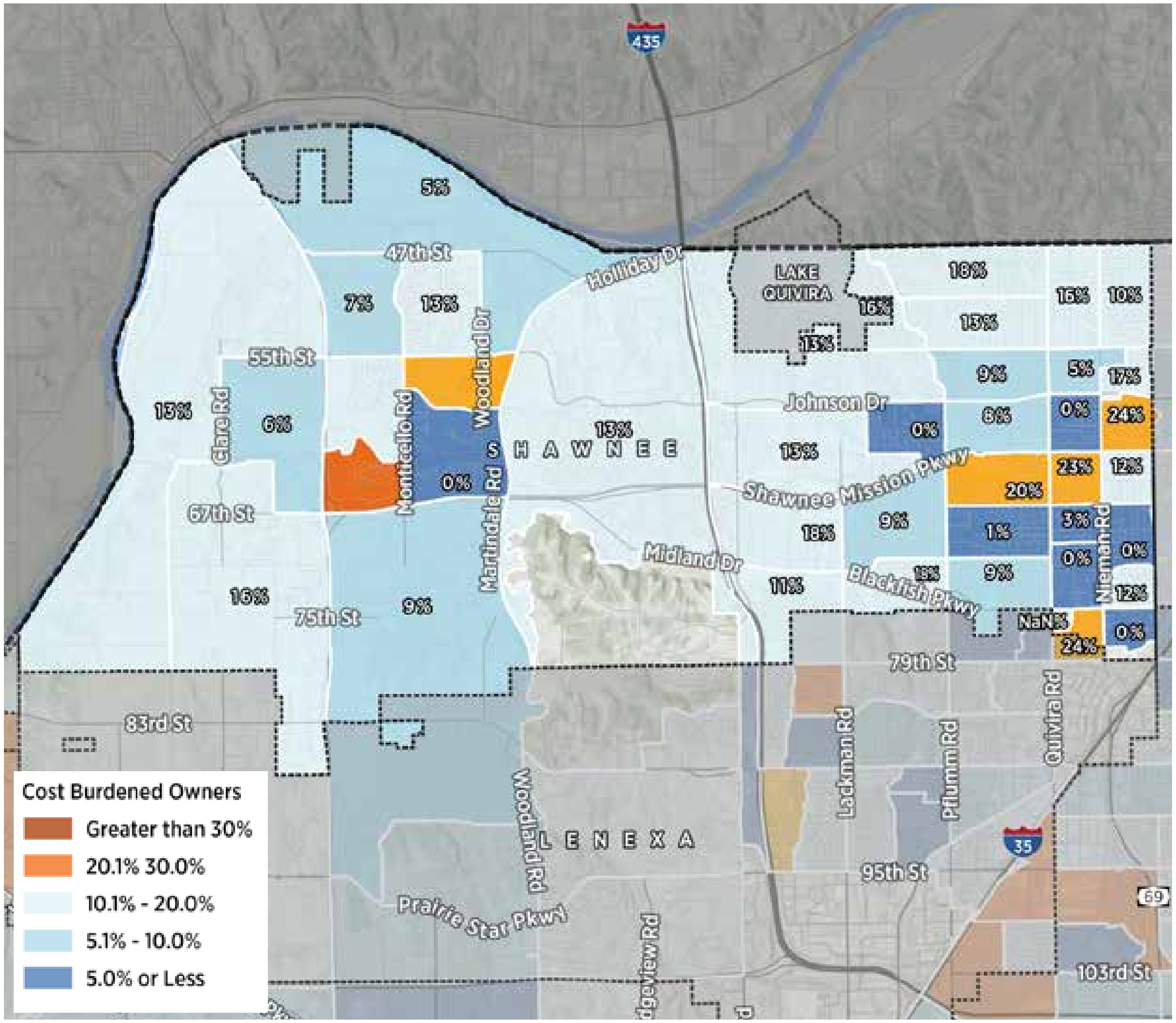
- Median contract rents are on the lower end of the spectrum in the county at $795, indicative of older apartments.
- Approximately 50% of Shawnee's households living in renter housing spend more than 30% of their income on gross rent.
- Low rental supply, and thus a competitive market, often results in higher rental prices. Shawnee has grown in the number of rental units with the recent construction of multifamily projects, which traditionally demand more rent than older units. Adding units to the market should create market pressures on older units to keep rates similar to today.
- Despite the new rental construction, Shawnee's rental units remain just under 30% of the market share, similar to 2000 levels. While the cost of homeownership has risen more the inflation, there may be a need for more rental options for younger households.

MAP 4.22: PERCENT OF RENTER-OCCUPIED COST BURDENED HOUSEHOLDS, SHAWNEE



Source: American Community Survey (2018 5-year Estimates)

MAP 4.23: PERCENT OF OWNER-OCCUPIED COST BURDENED HOUSEHOLDS, SHAWNEE



Source: American Community Survey (2018 5-year Estimates)

- Median home values are also on the lower end for the county at $225,900. The median home value in Shawnee rose nearly 14% between 2010 and 2018.
- Only 14% of households living in owner-occupied housing spend more than 30% of their income on housing.

Shawnee needs smaller, newer homes in the [$]250,000 to [$]325,000 for empty nesters or for young professionals. Larger homes for families will not come in the market if newer housing choices are not there...

- Survey Respondent

HOUSING DEMAND

The housing demand analysis builds on the population projections, housing trends, and community conversations to forecast the demand for additional housing. The model is built on the following assumptions with a 1.08% growth rate:

- The proportion of the household population (those living in households and not skilled nursing or prisons) will remain stable through 2030.
- Average people per household is expected to remain constant over the next decade. Some growth may occur as Millennials move into their childbearing years and Baby Boomer households will also continue to shrink.
- Unit demand at the end of the period is calculated by dividing household population by the number of people per household. This equals the number of occupied housing units.
- A manageable housing vacancy provides housing choices for residents moving to the community. As noted earlier, the city's reported rate is low and should rise if housing production continues at a level near demand.
- Unit needs at the end of each period are based on the actual household demand plus the number of projected vacant units.

FIGURE 4.25: HOUSING DEMAND MODEL, SHAWNEE

	2020	2025	2030	TOTAL
POPULATION AT END OF PERIOD	66,659	70,344	74,233	
HOUSEHOLD POPULATION AT END OF PERIOD	66,224	69,885	73,749	
AVERAGE PEOPLE PER HOUSEHOLD	2.60	2.60	2.60	
HOUSEHOLD DEMAND AT END OF PERIOD	25,471	26,879	28,365	
PROJECTED VACANCY RATE	4.0%	4.5%	5.0%	
UNIT NEEDS AT END OF PERIOD	26,532	28,145	29,858	
REPLACEMENT NEED (TOTAL LOST UNITS)		50	50	100
CUMULATIVE NEED DURING PERIOD		1,664	1,762	3,426
AVERAGE ANNUAL CONSTRUCTION		333	352	343

Source: RDG Planning & Design

- Replacement need is the number of housing units demolished or converted to other uses. Homes in poor condition or obsolete should be gradually replaced in a city's housing supply. The number of units lost annually is based on historic demolition rates.
- Cumulative need shows the number of total units needed between the base year of 2020 and the year indicated at the end of the period.

Figure 4.25 shows an average annual construction need of 343 units. The average annual construction rate from 2012 to 2019 was 207 units, with a high of 300 in 2019 and a low of 146 in 2013. Recent growth has been driven by a better mix of single-family and multi-family units than in the past, although most multi-family units were age restricted. Age restricted units help fill housing needs for Shawnee if the residents in the units are moving from homes in Shawnee. Their former homes then become a new open unit on the market. Nonetheless, 2019 was still a big year for multi-family construction, a trend expected and needed to continue across many price points.

FIGURE 4.26: HOUSING DEVELOPMENT PROGRAM, SHAWNEE

	2025		2030		2020-2030	
TOTAL OWNER OCCUPIED						
ATTAINABLE: <$200,000	369	998	391	1,057	760	2,056
MODERATE MARKET: $200-250,000	145		154		300	
MARKET: $250-350,000	267		283		550	
HIGH MARKET: OVER $350,000	216		229		445	
TOTAL RENTER OCCUPIED						
ATTAINABLE: LESS THAN $1,000	331	665	351	705	682	1,370
MARKET: $1,000-1,500	186		197		383	
HIGH MARKET: $1,500+	148		157		306	
TOTAL NEED		1,664		1,762		3,426

Source: RDG Planning & Design

"Anti multi-family housing sentiment is strong in Shawnee. There are very few areas that a developer could go without meeting strong community member resistance."

\- **Survey Respondent**

DEVELOPMENT PROGRAM

Building on the housing demand model, the development program forecasts production targets for owner and renter-occupied units based on the following assumptions:

- Owner-occupied units will be distributed roughly in proportion to the income distributions of the households for whom owner occupancy is an appropriate strategy.
- Most low-income residents will be accommodated in rental units.
- Over the next ten years, productions levels need to balance to provide the housing variety necessary for a growing population. Therefore, the model illustrated in **Figure 4.26** targets a split of 60% owner- and 40% renter-occupied units.
  - Approximately1,060 additional owner-occupied units should be priced below $250,000. This demand will come through the city's existing housing stock being freed up through move-up housing or products that do not fit the traditional detached single-family homes.
  - About 682 rental units will need to be produced with rents below $1,000 per month. These units will have to be generated through programs like low-income housing tax credits, maintaining the quality of existing rentals, and mixed-income housing developments.

COMMUNITY PERCEPTIONS

SURVEY

A total of 445 residents of Shawnee took the community survey made available online and in paper form. From their responses the following themes emerged:

- Housing types respondents felt likely to be successful are those already present–mid-size, 3-bedroom homes, small 2-3 bedroom homes, and independent senior living would be successful. However, all suggested housing types received at least 40% support.
- Respondents felt the housing supply in Shawnee does not meet the needs of single professionals or students as well as the rest of Johnson County does. In most other categories the city and county align more closely.
  - The housing supply for people with physical and/or mental disabilities, students, low wage workers, and households needing access to transit all ranked low.
- When asked about solutions they would support to reduce housing costs in Johnson County, the highest ranking suggestions were downpayment assistance to owners and housing rehabilitation loans. Similar to other communities, construction financing assistance to builders ranked at the bottom.
- Just under half of respondents looked to move within the past three years, 41% to an owner-occupied unit and 11% to a rental.
  - For those looking for owner units, a shortage was perceived for units under $200,000.
  - For rental units, monthly rents less than $1,000 were in short supply.

FIGURE 4.28: DECISION TO MOVE IN PAST 3 YEARS

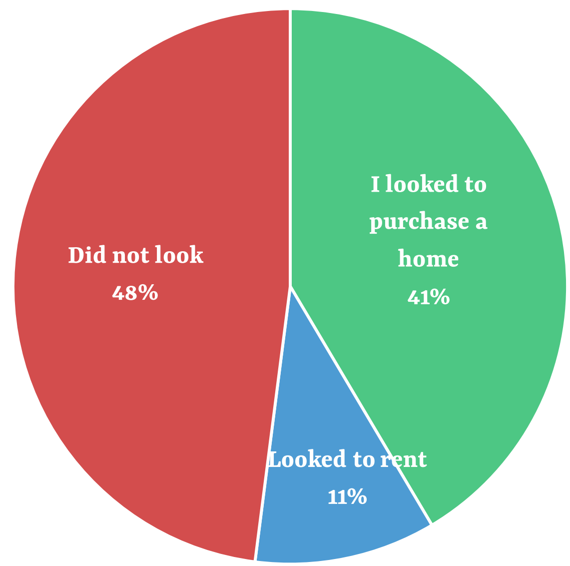
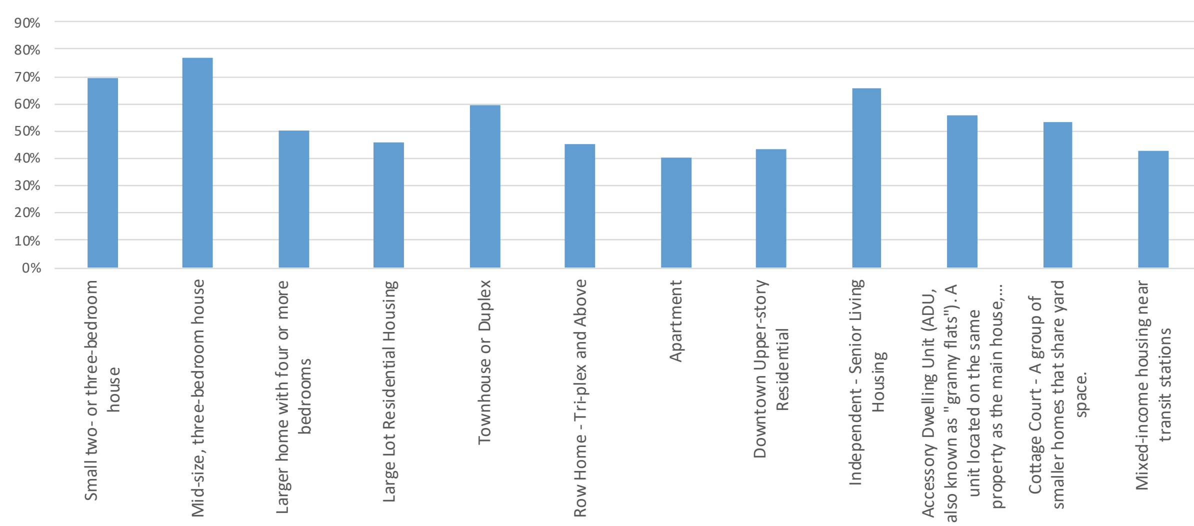


FIGURE 4.27: PERCEIVED HOUSING TYPES LIKELY TO BE SUCCESSFUL IN THE CITY



LISTENING SESSIONS

Many people familiar with the housing market specific to Shawnee participated in small group discussions. These included representatives from the City Council, Planning Commission, school districts, and real estate agents, among others.

COMMON COMMENTS

Aside from common themes in Chapter 2 that pertain to the entire county, several common comments are apparent to Shawnee.

- A lot of high end development is still being brought forward even when almost all multi-family development gets opposition from neighbors. Uncertainty for development approvals in Shawnee is high compared to other cities and is starting to deter developers from wanting to build in the city.
  - A large physical barrier to lot development in many areas is the terrain and increasing infrastructure and construction costs.
  - The City of Shawnee has an excise tax for building out infrastructure. The city can waive the tax for development and several projects have used it. A model to potentially expand in the future.
- Many comments on the survey suggest exploring smaller house and lot sizes, even so far as tiny homes. On the other end, many do not see the need for apartments as attainable housing options for many people that may want to live and work in Shawnee.

FIGURE 4.29: PERCEIVED HOUSING SUPPLY CURRENTLY MEETS THE NEEDS OF THE FOLLOWING HOUSEHOLD TYPES

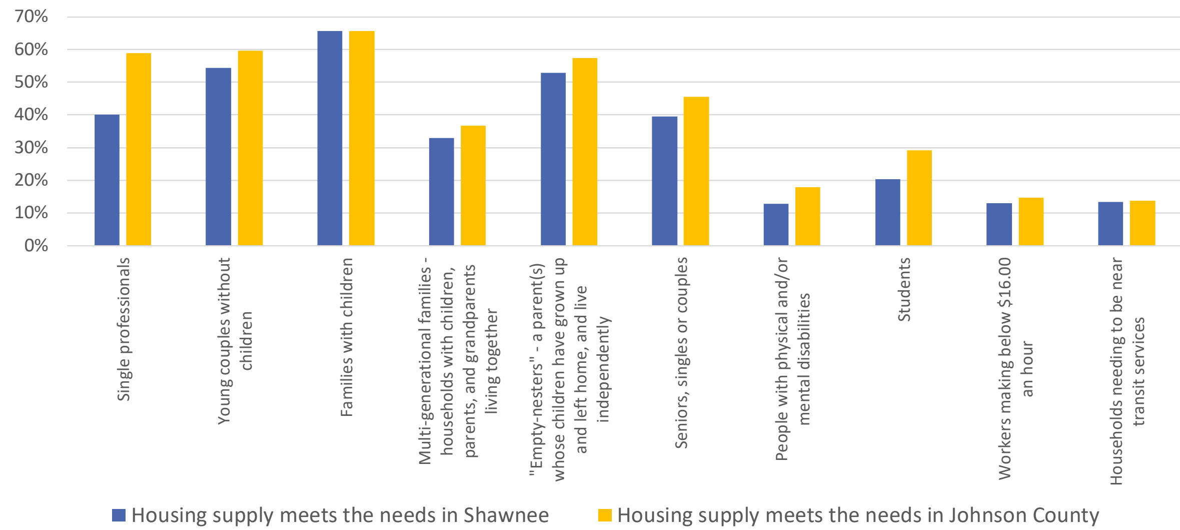
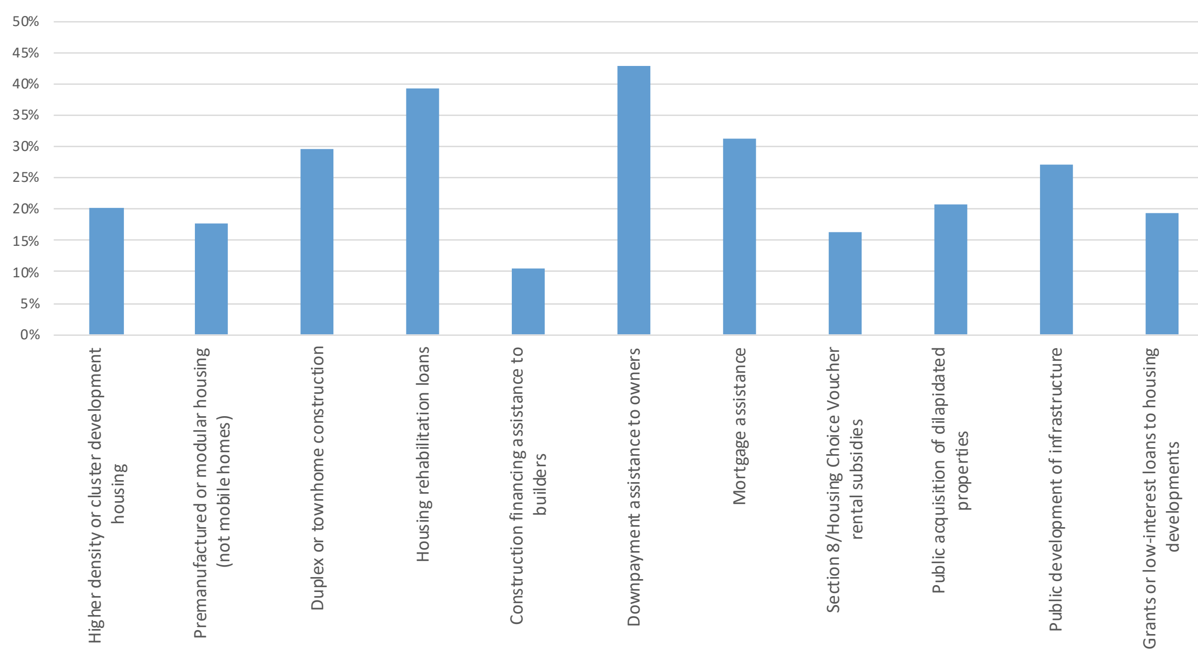


FIGURE 4.30: HOUSING SOLUTIONS SUPPORT TO REDUCE HOUSING COSTS IN JOHNSON COUNTY



LENEXA

Lenexa is the 4th most populous city in Johnson County. The community has a fairly new housing stock and a fairly good split between owner- and renter-occupied housing options. Lenexa has a good amount of suitable land available for development in the next 10 years.

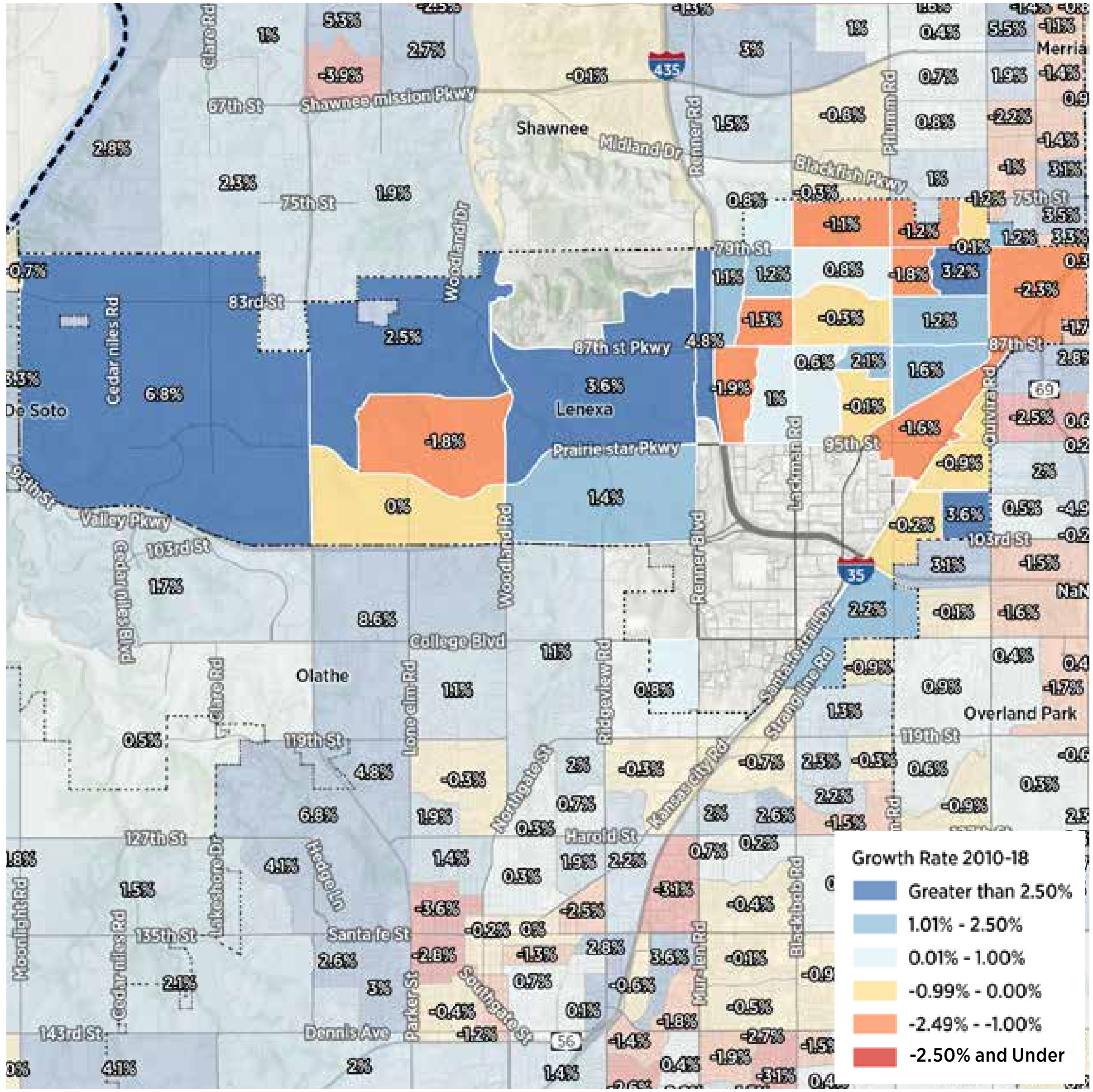
POPULATION CHANGE

Lenexa has been growing at a steady annual rate of about 1.8% since 1990. Prior to that, the community saw explosive growth between 1970 and 1980 at 255% over the decade, from a small community to a city. **Map 4.24** shows the annual growth rate between 2010 and 2018 of various census blocks. Areas in the west saw the most growth. However, a few census blocks in the older neighborhoods also saw substantial growth.

GROWTH ANALYSIS

Given Lenexa's steady growth since 1990 and land availability, it's projected the city will continue to grow at a similar annual rate. Growth trajectories will continue west.

MAP 4.24: POPULATION GROWTH RATE 2010-2018 BY BLOCK GROUP, LENEXA

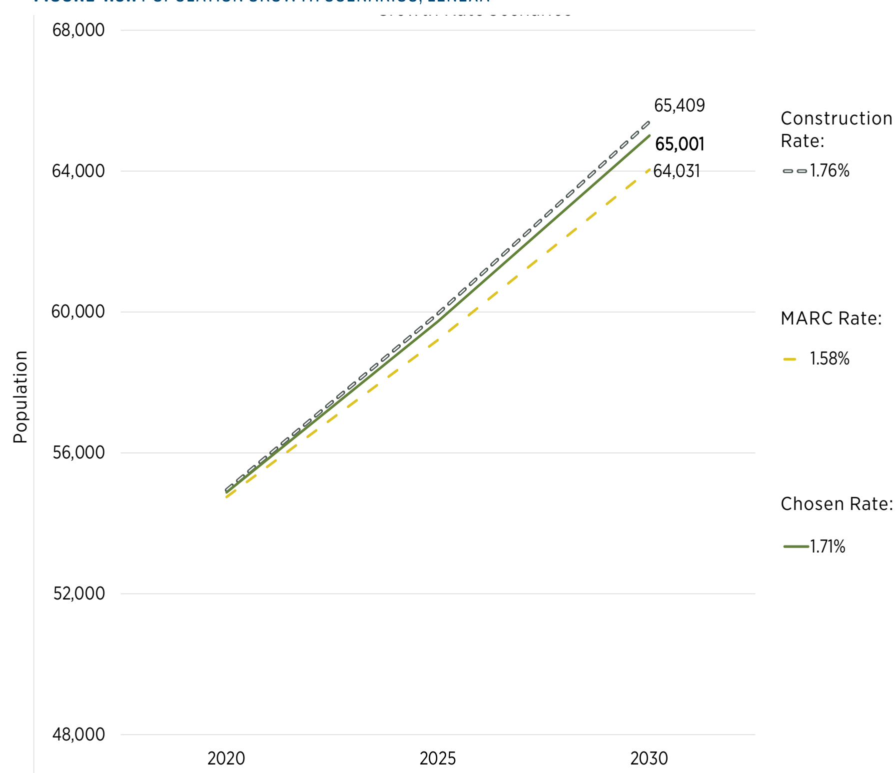


Source: American Community Survey (2018 5-year Estimates)

TEN-YEAR POPULATION FORECAST

Figure 4.31 shows population forecast scenarios through 2030. The 1.58% rate is the MARC projection. Lenexa is most likely to continue at a similar annual rate as in recent decades (1.71%) which is slightly higher than the MARC rate and lower than construction activity in the last ten years (1.76%). The forecast will produce an estimated 2030 population of 65,001.

FIGURE 4.31: POPULATION GROWTH SCENARIOS, LENEXA



Source: U.S. Census; MARC; RDG Planning & Design

HOUSING OCCUPANCY

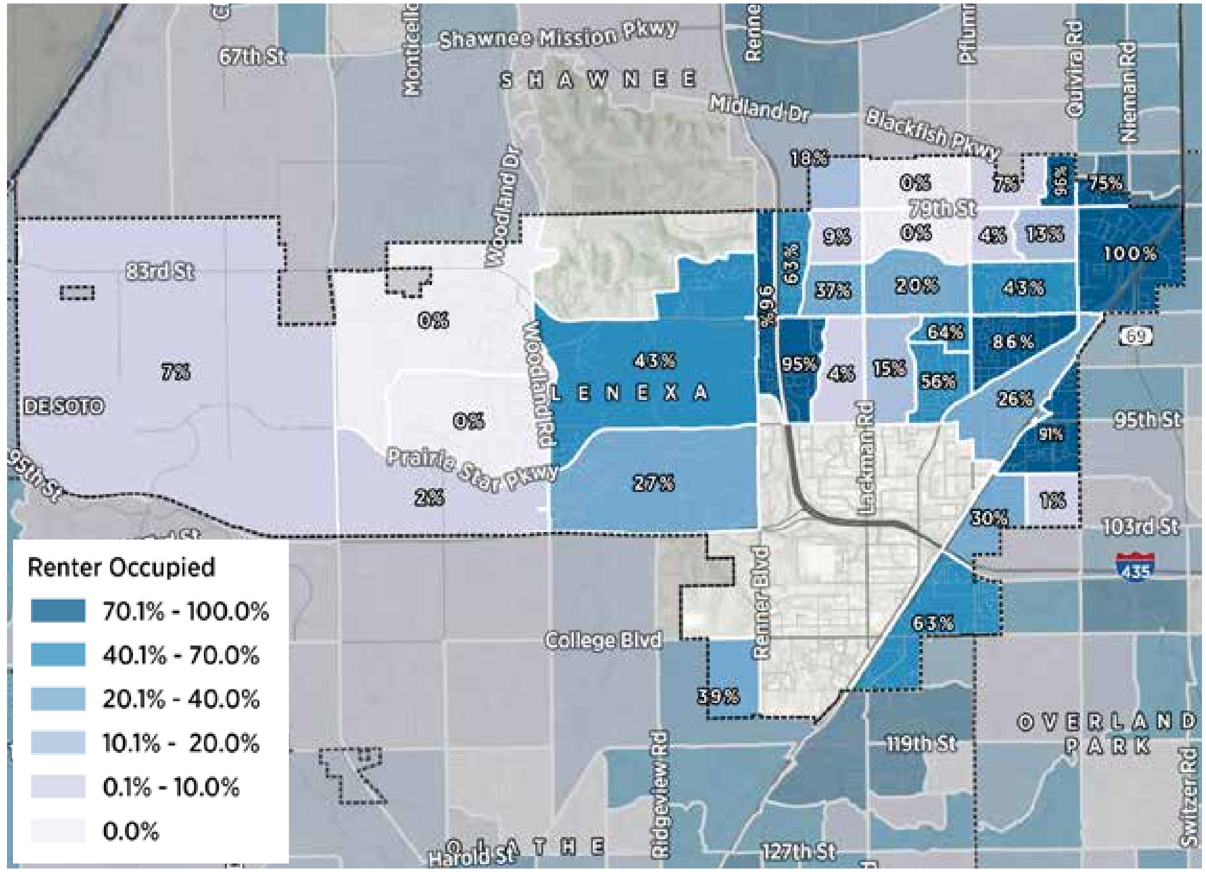
Map 4.25 shows the percent of renters across Lenexa.

- Vacancy rates are quite stable citywide, between about 5% in 2018, down from 7.4% in 2010. A healthy market vacancy rate is around 6%.
- Household size is 2.48 people per household, which is higher than many cities in Johnson County.
- Renter occupancy is highest in the eastern portion of the city, especially in census blocks adjacent to regional transportation infrastructure and in the new mixed-use core.

"In Lenexa, I'd like to see some apartments also pop up in the old town (Pflumm/ Santa Fe) area as well."

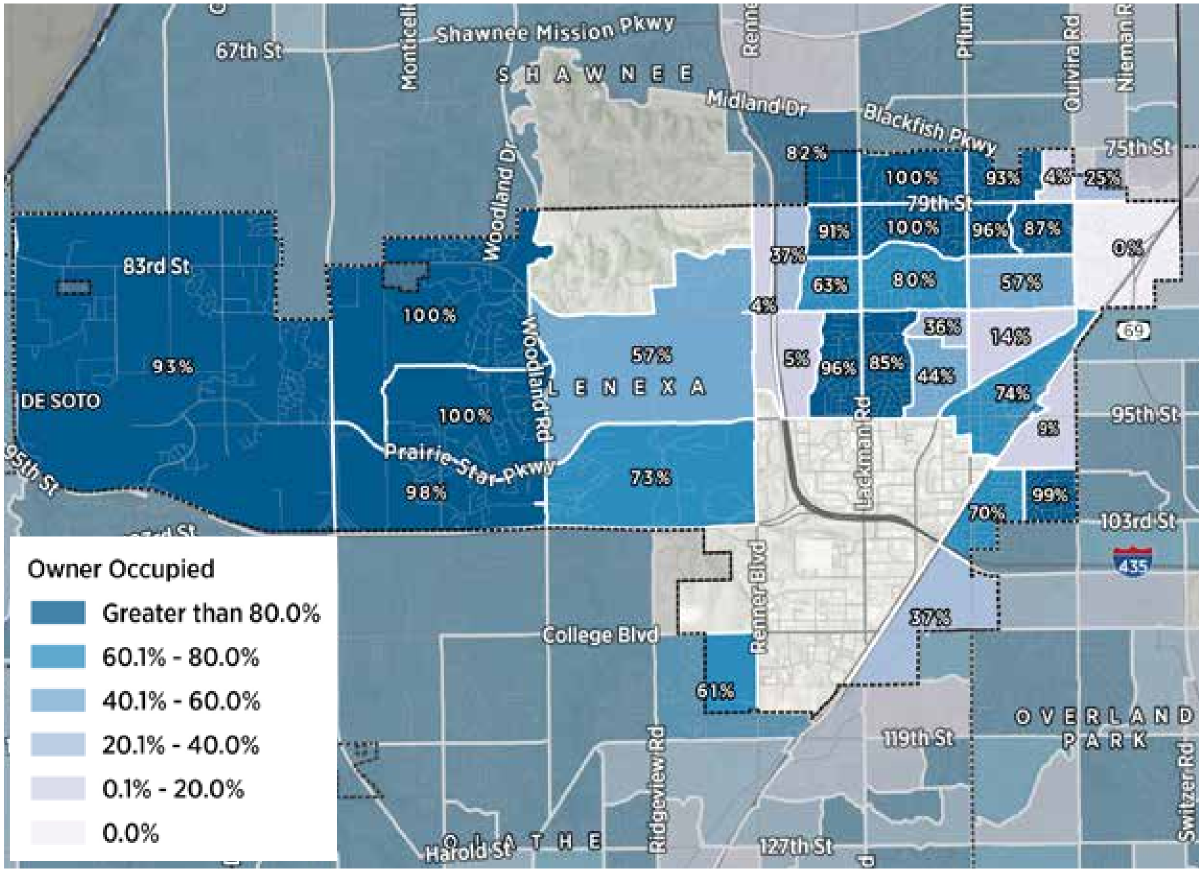
- Survey Respondent

MAP 4.25: PERCENT RENTER OCCUPIED STRUCTURES, LENEXA



Source: American Community Survey (2018 5-year Estimates)

MAP 4.26: PERCENT OWNER OCCUPIED STRUCTURES, LENEXA



Source: American Community Survey (2018 5-year Estimates)

Map 4.26 shows the percent of owners across Lenexa.

- Across the city about 62% of housing units are owner-occupied. This is a about the same as both 2000 and 2010.
- Most of the western areas of the city are owner-occupied, which should balance out with more renter options in the future as subdivisions fill out.

CONSTRUCTION ACTIVITY

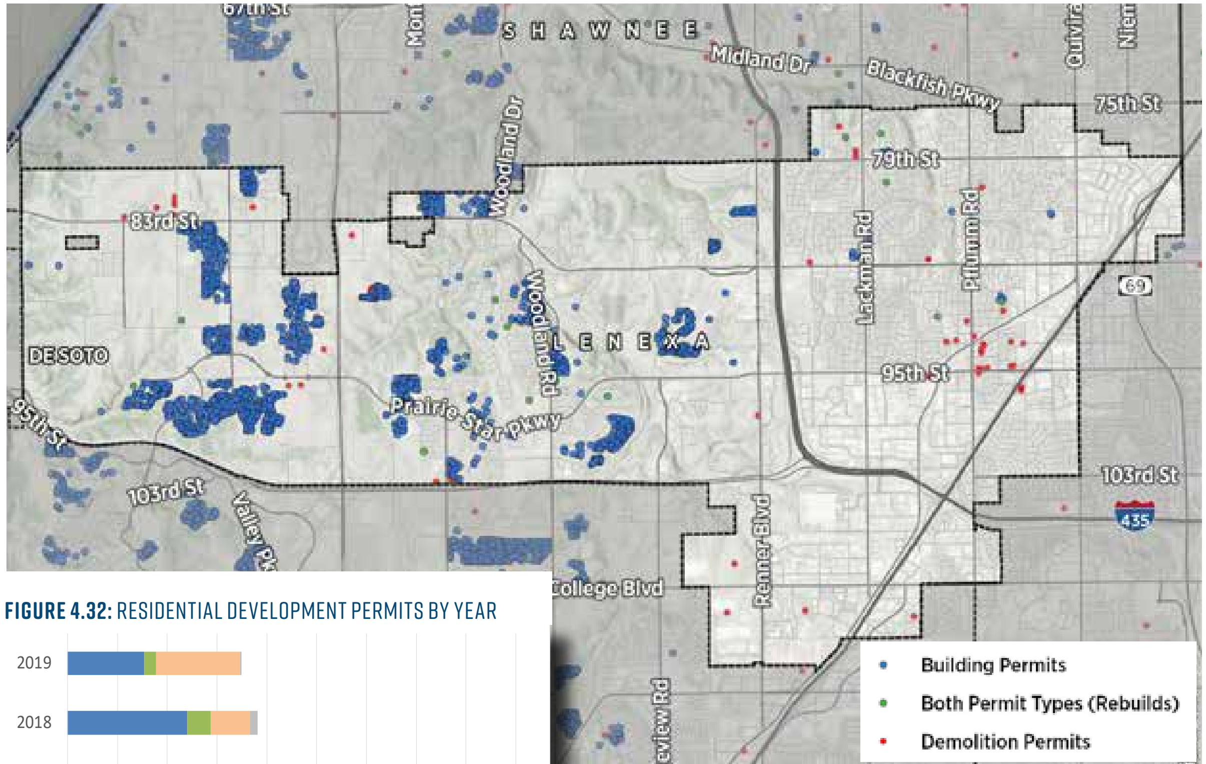
Like many cities, residential construction activity continues to increase since the Great Recession. Considering the average household size, residential construction since 2012 would equate to a 1.76% annual growth rate. **Map 4.27** shows the location of permits. Between 2013 and 2019:

- About 40% of new units were single-family dwellings. On average, about 207 new single-family homes are constructed annually.
- About 60% of new units were multi-family units, including apartments, townhomes, and any structure with more than two units. The influx from 2014-2017 follows significant development in the city center.
- Demolitions were relatively low with an average of only seven per year. The most demolitions occurred in 2018 with 16 total.

"new neighborhoods lack true character that comes with time. Invest in historical neighborhoods, like Downtown Lenexa. Help those homeowners keep, restore and modify homes...instead of tear down for new builds."

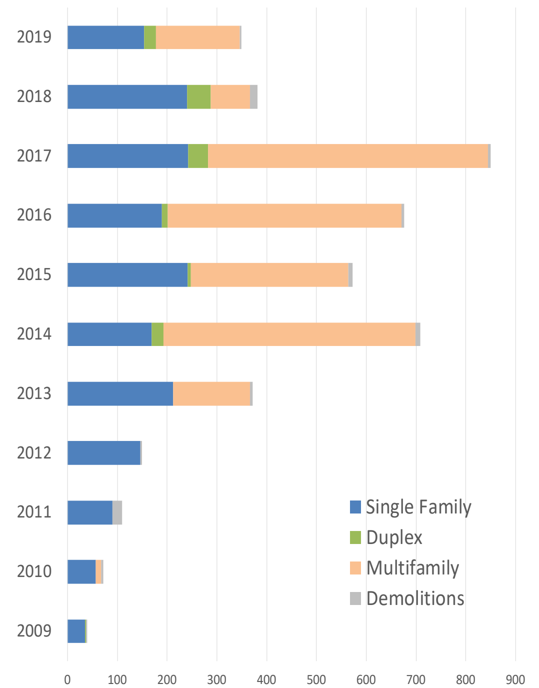
- Survey Respondent

MAP 4.27: RESIDENTIAL NEW CONSTRUCTION PERMITS BY LOCATION (2010-2019), LENEXA



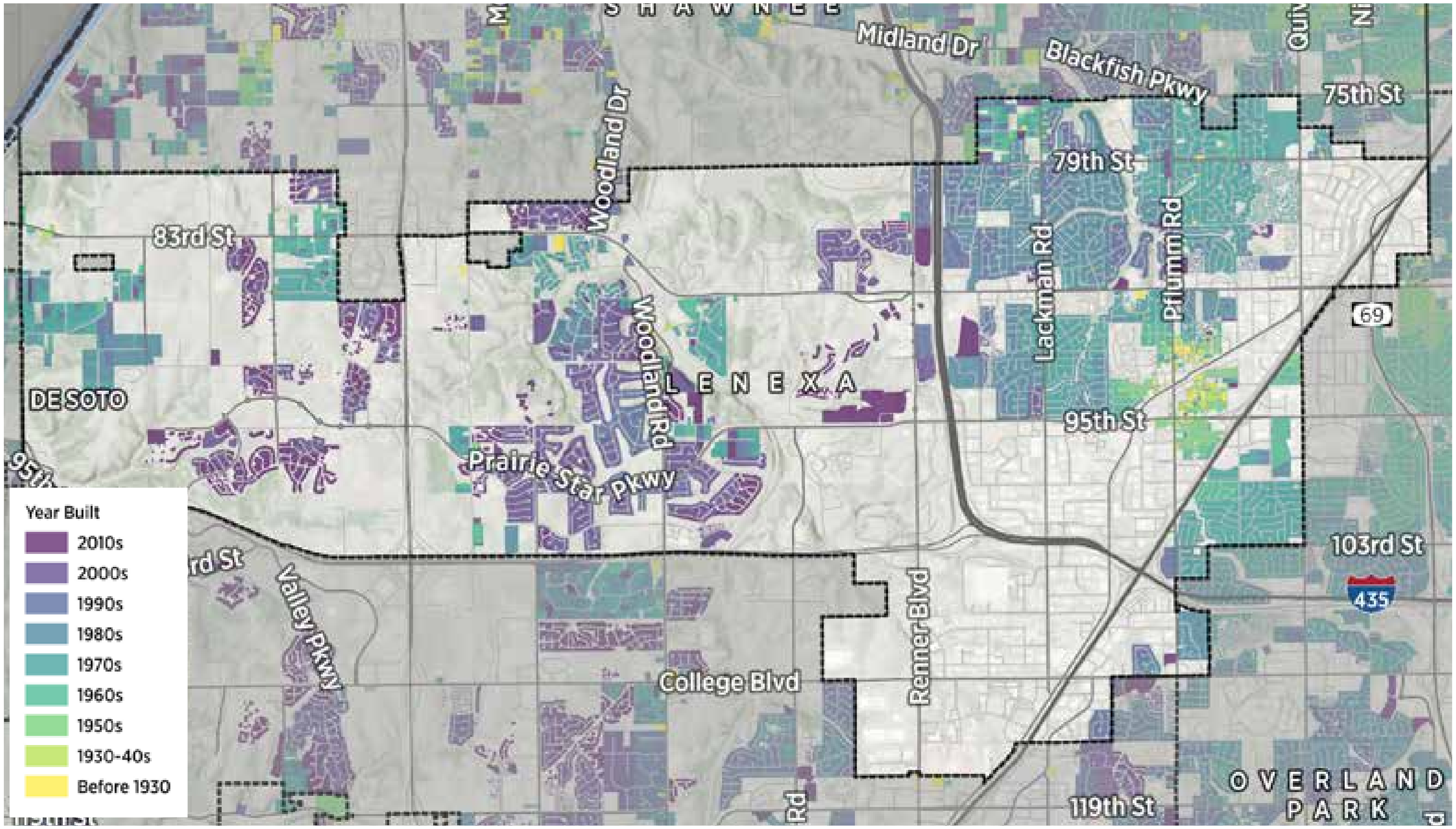
Source: Johnson County GIS Department

FIGURE 4.32: RESIDENTIAL DEVELOPMENT PERMITS BY YEAR



Source: City of Lenexa

MAP 4.28: AGE OF HOUSING STOCK, LENEXA



Source: Johnson County GIS Department, Assessor Data

AGE OF HOUSING

Map 4.28 shows the year built of residential dwellings. The age of housing provides preliminary insight into areas more susceptible to deterioration and additional homeowner costs. If these areas are also occupied by lower income households then monitoring of rehabilitation needs is even more important.

- Lenexa has a fairly modern housing stock. Only 9% of units were built prior to 1969. These are the homes typically in the most need of repairs and at risk of falling into dilapidation.
- About 83% of homes were built between 1970-2009. Generally, homes built during this time period are only in need of minor cosmetic upgrades and not major structural work.

HOME SALES

How quickly homes sell in a market is a leading indicator of housing demand and supply. **Figure 4.33** shows home sales data from 2017-2019. In Lenexa, unlike other areas in the county:

- Average sales price of a home has remained relatively consistent, only rising between 2017 and 2018 but staying the same in 2019. The number of homes sold on the market also increased.
- Average days on market remains low. However, in Lenexa the amount of time a home stays on the market has increased slightly since 2017.
- These two trends are indicative of new home construction or spec home construction where one product is being built at scale, which can take slightly more time to sell until the subdivision fills out.

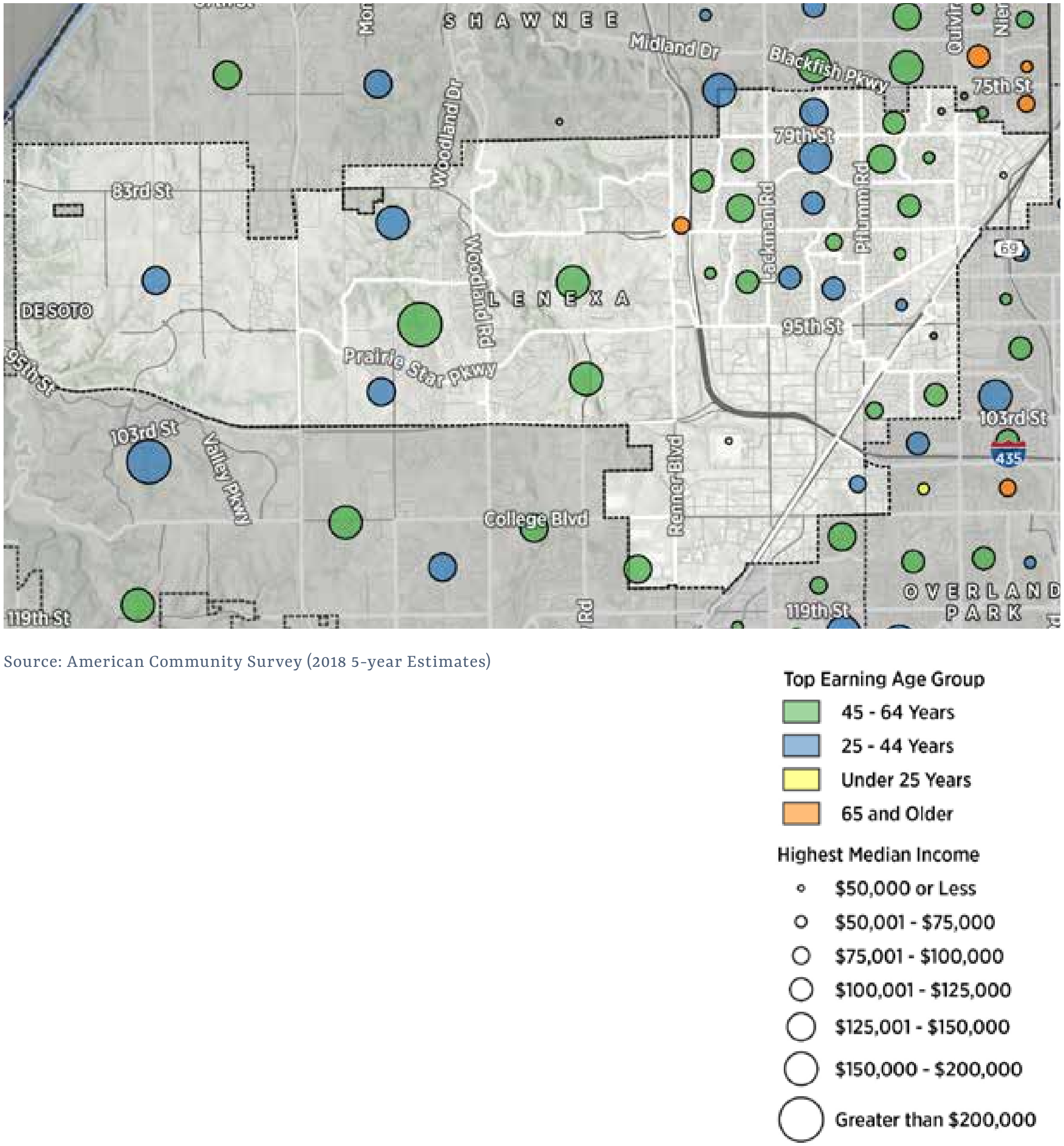
> There are not enough homes (especially move in ready) for families and childless young couples.... In Lenexa there are practically no homes for sale.

- Survey Respondent

FIGURE 4.33: SINGLE FAMILY HOME SALES, LENEXA

Source: Multiple Listings Service (2017-2019)

MAP 4.29: HOUSEHOLD INCOME OF TOP EARNING AGE GROUP, LENEXA



Source: American Community Survey (2018 5-year Estimates)

HOUSEHOLD INCOME

Map 4.29 provides an overview of Lenexa's estimated household incomes:

- Median household income is $84,370, about average for the county. Median income increased by 11% since 2010.
- The highest incomes are reported in the central portion of the city limits, with a high number of 45 to 64 year olds earning top salaries.

"Very low inventory for houses that cost under $400,000. I think there are now plenty of apartments/condos/lofts for people. New developments need to be affordable single family homes. In Lenexa all the new developments seem to be for houses that cost $600k+ "

- Survey Respondent

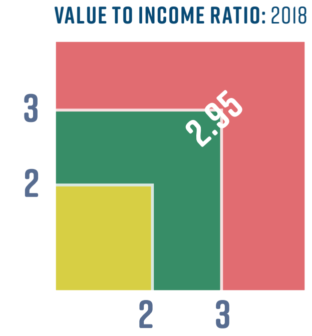
HOUSING ATTAINABILITY AND SUPPLY ANALYSIS

By comparing the distribution of household incomes with housing costs, a picture of supply and demand emerges across all of Lenexa's housing market. **Figure 4.34** examines supply and demand through the lens of what is "affordable" to different income groups to answer the question: is there an adequate supply of housing options available for residents of different income groups?

Figure 4.34 illustrates five major components in pursuit of the above story:

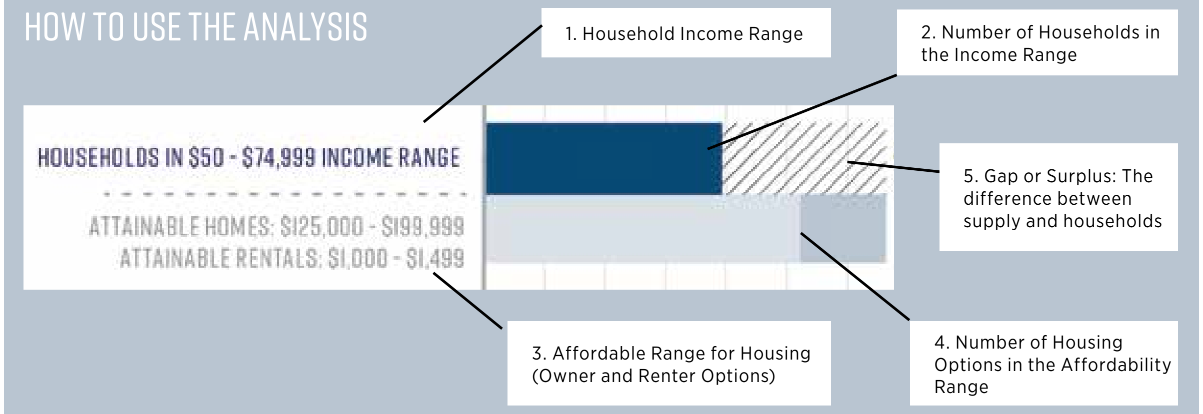
1. **Income Ranges.** The starting point of the analysis is the spectrum of incomes across all residents of Lenexa. From these incomes, corresponding "affordable" housing prices are established for ownership and rental opportunities.
2. **Number of Households in Each Income Range.** The number of households in each income range is the demand; these residents seek housing options in Lenexa that are affordable to them.
3. **Affordability Ranges.** An affordable ownership home is calculated at 2-3 times the household income depending on the income range. Lower income households tend to spend a higher percentage of their income on housing and higher income households tend to spend a lower percentage of their total income on housing. An affordable rental would be about 20% of household income.
4. **Number of Housing Units in Each Affordability Range.** The number of housing units in each affordability range is the supply of affordable options.
   - Composition of Housing Supply. This illustrates the share of the supply met by ownership and renter housing options.
5. **The Balance of Supply and Demand.**
   - If the number of households exceeds the number of units available, those households must seek options in different affordability ranges.
   - If the number of units exceeds the number of households, it indicates that the units are occupied by households in different income ranges.
   - **This analysis is meant to illustrate larger trends in how existing units are being occupied. It does not demonstrate exact market demand in certain price ranges.**

VALUE TO INCOME BENCHMARK



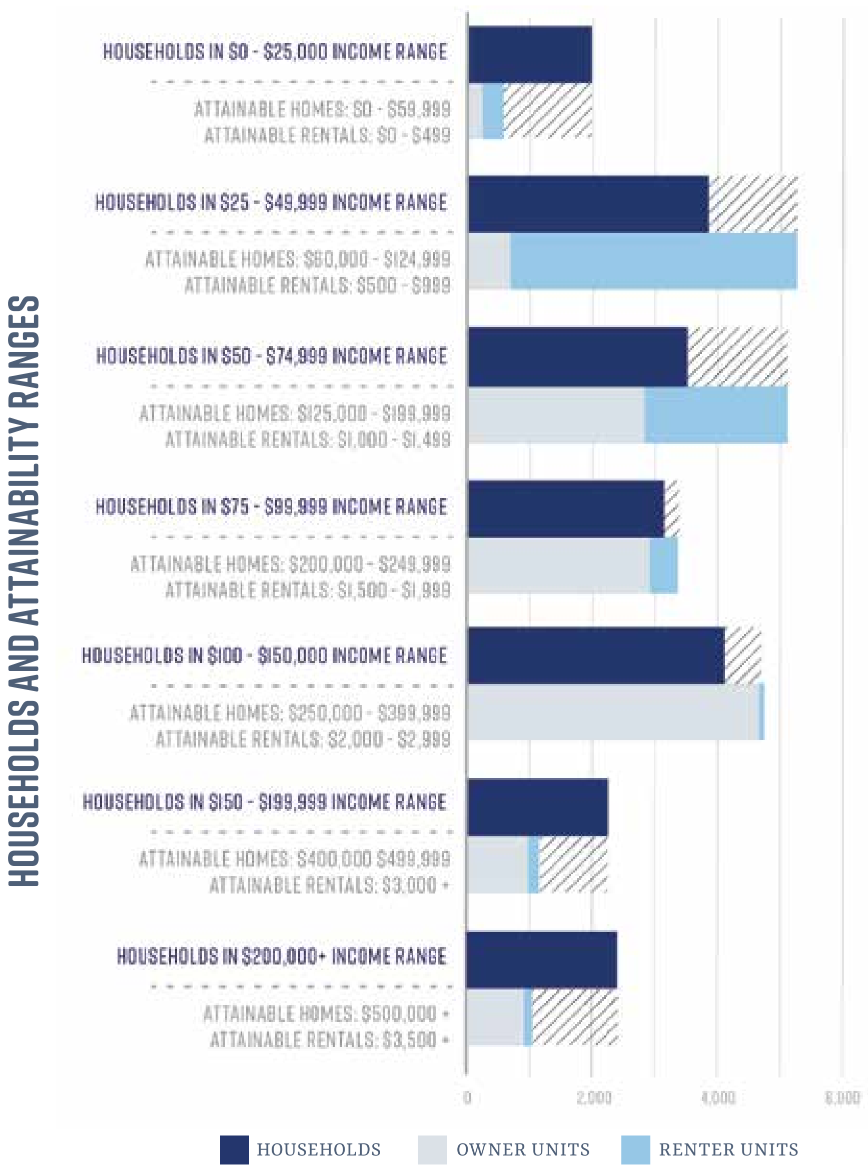
The overall housing market in Lenexa is considered nearing unaffordable. A healthy, self-sustaining housing market will have a value to income ratio between 2 and 3. Lenexa's rate is 2.95, up from 2.82 in 2010.

HOW TO USE THE ANALYSIS



The analysis in **Figure 4.34** is based on all the households today that are occupying a unit. No household is without a unit.

FIGURE 4.34: HOUSING ATTAINABILITY,LENEXA (2018)



Source: American Community Survey (2018 5-year Estimates); RDG Planning & Design

Units attainable for households making between $25,000 and $75,000 receive competition from higher income households and cost-burdened lower income households.

- These include older households on fixed incomes who report low earnings but may have their homes paid off. For example:
  - 25% of all owner-occupied households in Lenexa are over the age of 65.
  - The median household income for households over 65 is estimated around $68,000, meaning that 50% of those households make less than $68,000.
  - Additionally, 59% of owner-occupied households over the age of 65 do not have a mortgage.

- Many units are attainable for household's making between $25,000 and $75,000. The surplus is not a bad thing but many of these units receive competition from higher income households and cost-burdened lower income households. These units should be maintained as attainable options for many households in the future.

- There are fewer households than affordable options. Many units in this range see competition from upper income brackets.

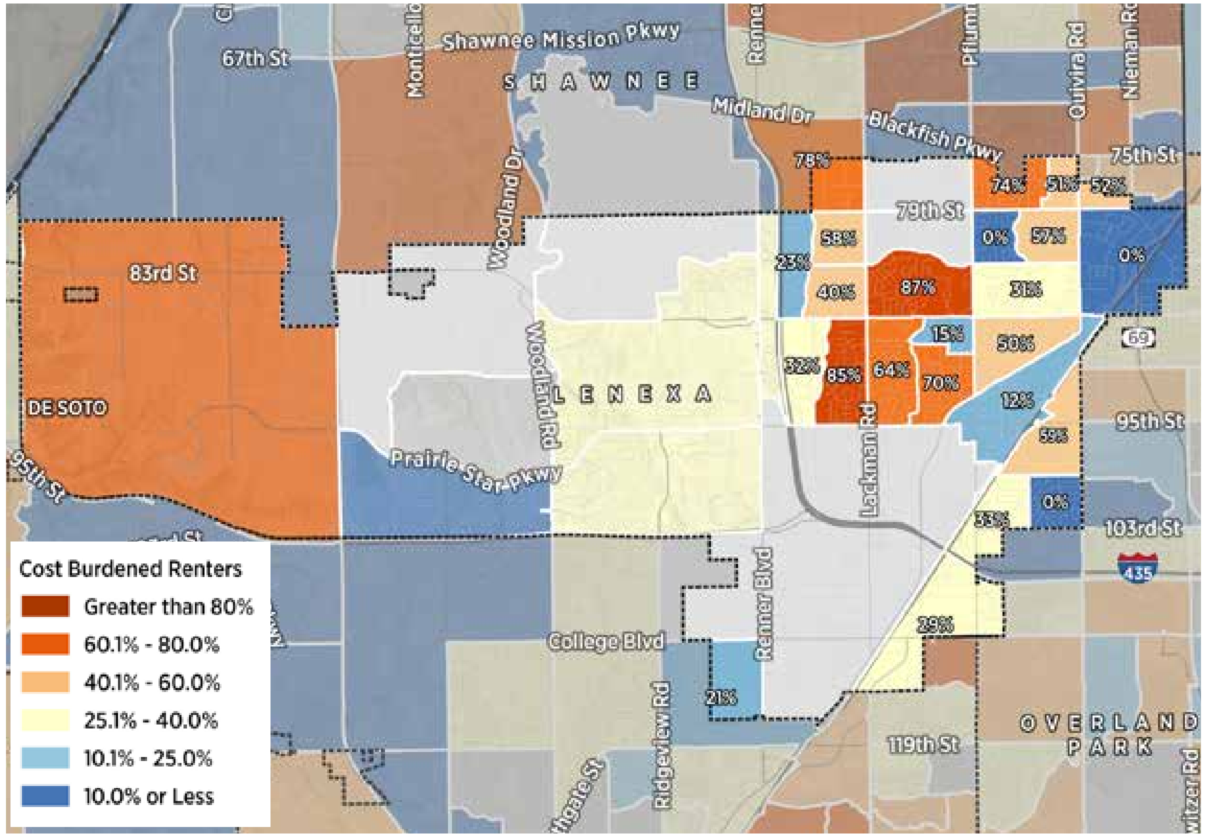
- Over half of the households earning more than $150K must fill units attainable to lower income households thus creating a shortage of housing units for many first-time home buyers and those looking to step up from their first home.
- Over 2,300 households making over $100,000 a year are living in owner-occupied units priced below $250,000.
- They do this for a variety of reasons, including housing cost and neighborhood preferences in addition to a lack of other options above this price range.

COST BURDENED RESIDENTS

Maps 4.30 and **4.31** illustrates the level of cost-burdened households. According to the U.S. Government, households spending more than 30% of their income on housing are considered cost-burdened, although this does not account for potential high transportation costs for those that must use public transit.

- Median contract rents are on the upper end in the county at $907. This is indicative of the development of multi-family units in recent years.
- Approximately 42% of Lenexa's households living in renter housing spend more than 30% of their income on gross rent. Only 14% of households living in owner-occupied housing spend more than 30% of their income on housing.
- Low rental supply, and thus a competitive market, often results in higher rental prices. Lenexa has experienced strong growth in the number of rental units, which traditionally demand more rent than older units. However, most of Lenexa's rental supply is newer and tends to be higher end with many amenities.

MAP 4.30: PERCENT OF RENTER OCCUPIED COST BURDENED HOUSEHOLDS, LENEXA

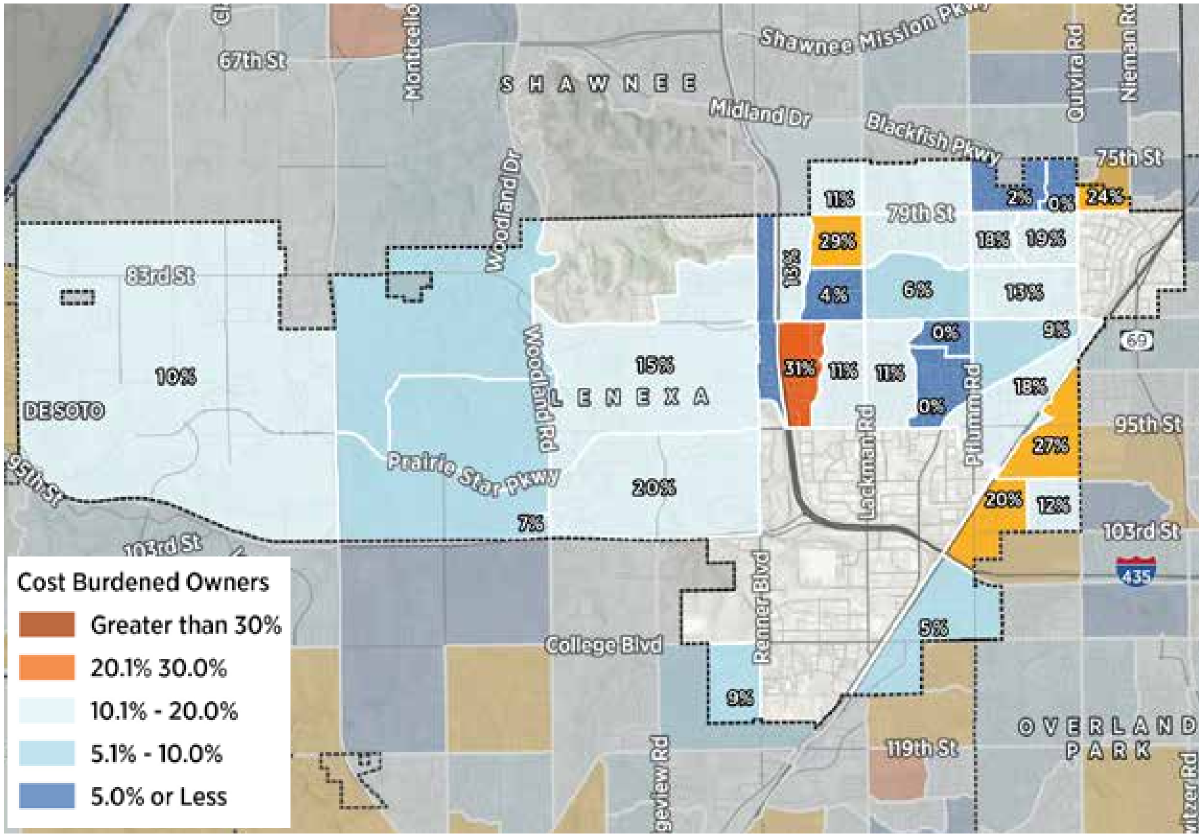


Source: American Community Survey (2018 5-year Estimates)

"My dad is a retired widower. He made a good living, but cannot afford a small home in Lenexa. He pays an outrageous amount of money in apartment rent, but wants a home near his daughter and grandkids..."

- Survey Respondent

MAP 4.31: PERCENT OF OWNER OCCUPIED COST BURDENED HOUSEHOLDS, LENEXA



Source: American Community Survey (2018 5-year Estimates)

- Median home values are in the middle for the county at $248,800.
- Cost burden households are scattered across the city, with the most in the core along Interstate 435.

"As an older citizen I would like more affortable cottage style living with shared common area. That would be my dream to downsize from our now large 4 bd/5 br house in Lenexa."

- Survey Respondent

HOUSING DEMAND

The housing demand analysis builds on the population projections, housing trends, and community conversations to forecast the demand for additional housing. The model is built on the following assumptions with a 1.71% growth rate:

- The proportion of the household population (those living in households and not in skilled nursing or prisons) will remain stable through 2030.
- Average people per household is expected to remain constant over the next decade. Some growth may occur as Millennials move into their childbearing years, but Baby Boomer households will also continue to shrink.
- Unit demand at the end of the period is calculated by dividing household population by the number of people per household. This equals the number of occupied housing units.
- A manageable housing vacancy provides housing choices for residents moving to the community. As noted earlier, the county's rate is slightly high but likely reflects the point in time that it was gathered.
- Unit needs at the end of each period are based on the actual household demand plus the number of projected vacant units.

FIGURE 4.35: HOUSING DEMAND MODEL, LENEXA

	2020	2025	2030	TOTAL
POPULATION AT END OF PERIOD	54,878	59,725	65,001	
HOUSEHOLD POPULATION AT END OF PERIOD	54,482	59,294	64,531	
AVERAGE PEOPLE PER HOUSEHOLD	2.48	2.48	2.48	
HOUSEHOLD DEMAND AT END OF PERIOD	21,968	23,909	26,021	
PROJECTED VACANCY RATE	6.0%	6.0%	6.0%	
UNIT NEEDS AT END OF PERIOD	23,371	25,435	27,682	
REPLACEMENT NEED (TOTAL LOST UNITS)		40	40	80
CUMULATIVE NEED DURING PERIOD		2,104	2,287	4,391
AVERAGE ANNUAL CONSTRUCTION		421	457	439

Source: RDG Planning & Design

- Replacement need is the number of housing units demolished or converted to other uses. Homes in poor condition or obsolete should be gradually replaced in a city's housing supply. The number of units lost annually is based on historic demolition rates.
- Cumulative need shows the number of total units needed between the base year of 2020 and the year indicated at the end of the period.

Figure 4.35 shows an average annual construction need of 439 units. The average annual construction rate from 2012 to 2019 was 493 units, with a high of 690 in 2014 and a low of 142 in 2012. Unit growth between 2014-2017 was been driven by a large number of rental units in the new city center.

FIGURE 4.36: HOUSING DEVELOPMENT PROGRAM, LENEXA

	2025		2030		2020-2030	
TOTAL OWNER OCCUPIED						
ATTAINABLE: <$200,000	486	1,263	528	1,372	1,014	2,635
MODERATE MARKET: $200-250,000	205		223		429	
MARKET: $250-350,000	271		295		566	
HIGH MARKET: OVER $350,000	300		326		627	
TOTAL RENTER OCCUPIED						
ATTAINABLE: LESS THAN $1,000	395	842	429	915	824	1,756
MARKET: $1,000-1,500	236		256		493	
HIGH MARKET: $1,500+	211		229		440	
TOTAL NEED		2,104		2,287		4,391

Source: RDG Planning & Design

"...Before Covid, I noticed a lot of people in Lenexa Public Market bustling about working their service worker jobs with no way of ever affording to live in or near the luxury apartment complexes. How beautiful would it be for people working at these places to call it their home?..."

- Survey Respondent

DEVELOPMENT PROGRAM

Building on the housing demand model, the development program forecasts production targets for owner and renter-occupied units based on the following assumptions:

- Owner-occupied units will be distributed roughly in proportion to the income distributions of the households for whom owner occupancy is an appropriate strategy.
- Most low-income residents will be accommodated in rental units.
- The model illustrated in **Figure 4.36** targets a split of 60% owner- and 40% renter-occupied units, similar to the current unit breakdown.
  - Approximately 1,443 additional owner-occupied units should be priced below $250,000. This demand will come through the city's existing housing stock being freed up through move-up housing, or products that do not fit the traditional detached single-family homes.
  - Nearly 824 rental units will need to be produced with rents below $1,000 per month. These units will have to be generated through programs like low-income housing tax credits.

COMMUNITY PERCEPTIONS

SURVEY

A total of 411 residents of Lenexa took the community survey made available online and in paper form. From their responses the following themes emerged:

- Housing types likely to be successful are independent senior living and mid-sized 3 bedroom homes, followed closely by small 2-3 bedroom homes.
- Respondents felt the housing supply in Lenexa was generally in line with Johnson County. However, single professionals and students were perceived to be less provided for in Lenexa than in the county.
  - The housing supply for people with physical and/or mental disabilities, students, low wage workers, and households needing access to transit all ranked lowest.
- When asked about solutions they would support to reduce housing costs in Johnson County, the highest ranking suggestions were downpayment assistance to owners and housing rehabilitation loans.
- About half of respondents looked to move within the past three years, 31% to an owner-occupied unit and 20% to a rental.
  - For those looking for owner units, a shortage was perceived nearly evenly between all cost brackets up to $300,000.
  - For rental units, shortages existed for units priced below $1,000.

FIGURE 4.38: DECISION TO MOVE IN PAST 3 YEARS

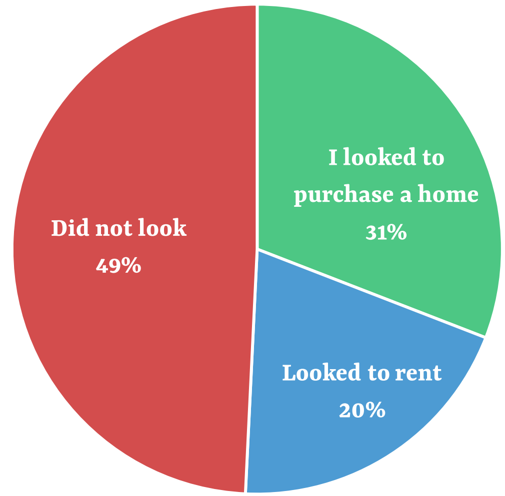
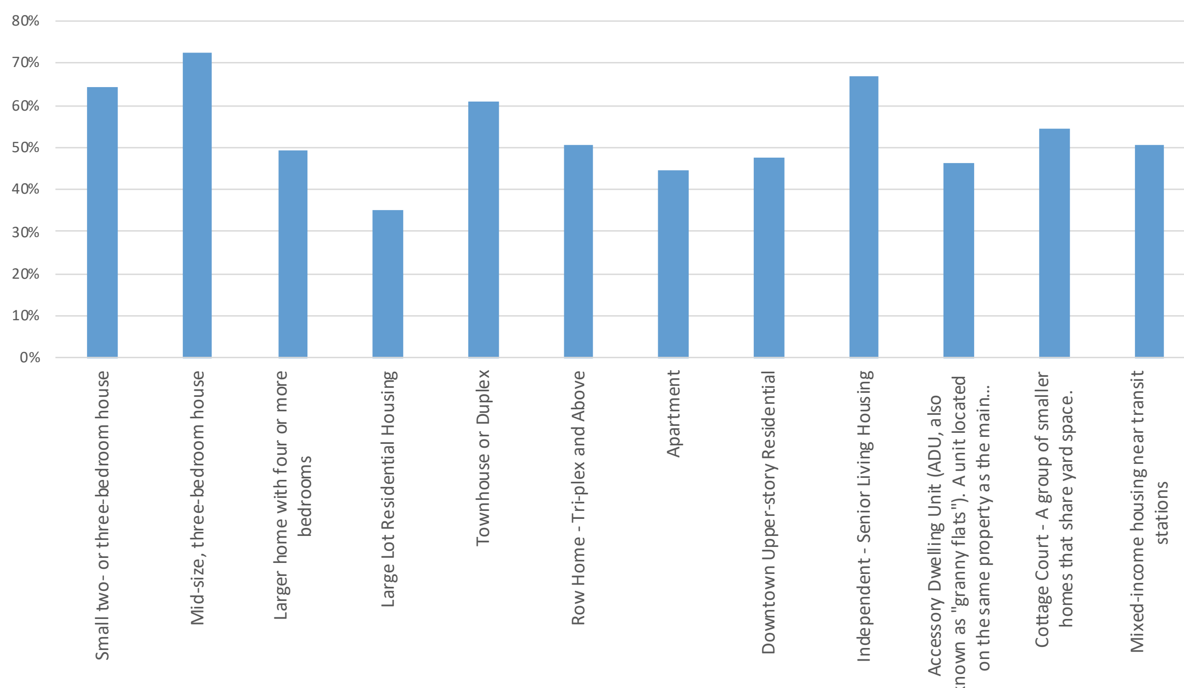


FIGURE 4.37: HOUSING TYPES PERCEIVED LIKELY TO BE SUCCESSFUL IN THE CITY



LISTENING SESSIONS

Many people familiar with the housing market specific to Lenexa participated in small group discussions. These included representatives from the City Council, Planning Commission, and real estate agents among others.

COMMON COMMENTS

Aside from common themes in Chapter 2 that pertain to the entire county, several common comments are apparent to Lenexa.

- Lenexa faces many of the same issues and opportunities as Shawnee. For example, apartment developments getting denied at because neighbors came in opposition, even after the developer has spent a lot on design to the code standards.
    - The new city plan Lenexa 2040 does call out the need for multi-family in certain areas, but these projects may still get denied at the final approval stage.
- Lenexa does have an area in an opportunity zone that has not been taken advantage of yet.
- Like those in Shawnee, many survey comments suggest a desire for smaller homes to reach more attainable price points for starter homes and downsizing.

FIGURE 4.39: PERCEIVED HOUSING SUPPLY CURRENTLY MEETS THE NEEDS OF THE FOLLOWING HOUSEHOLD TYPES

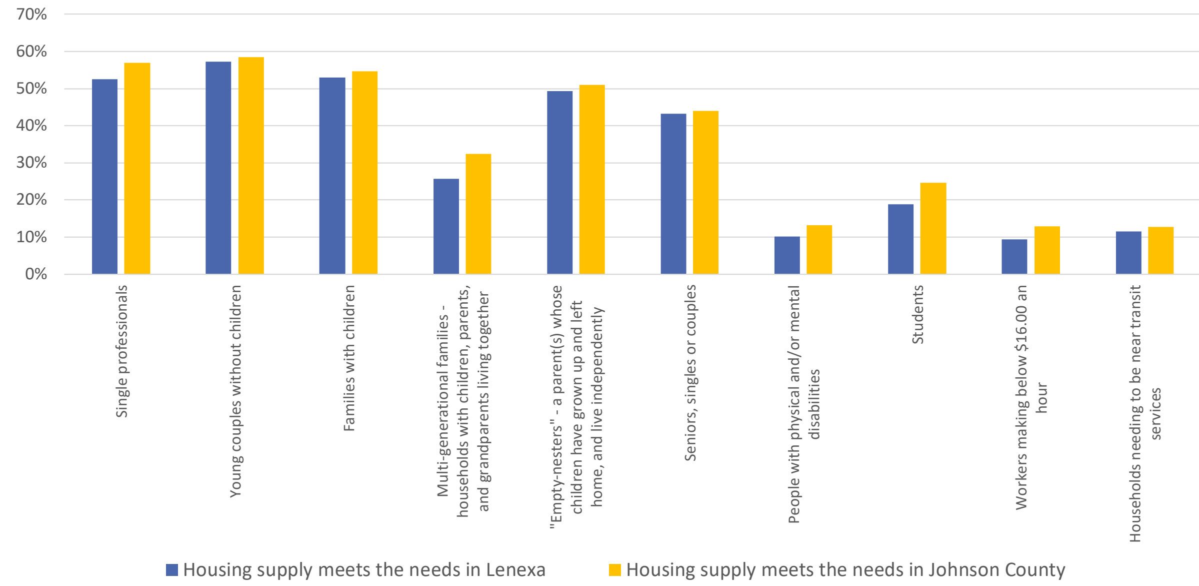
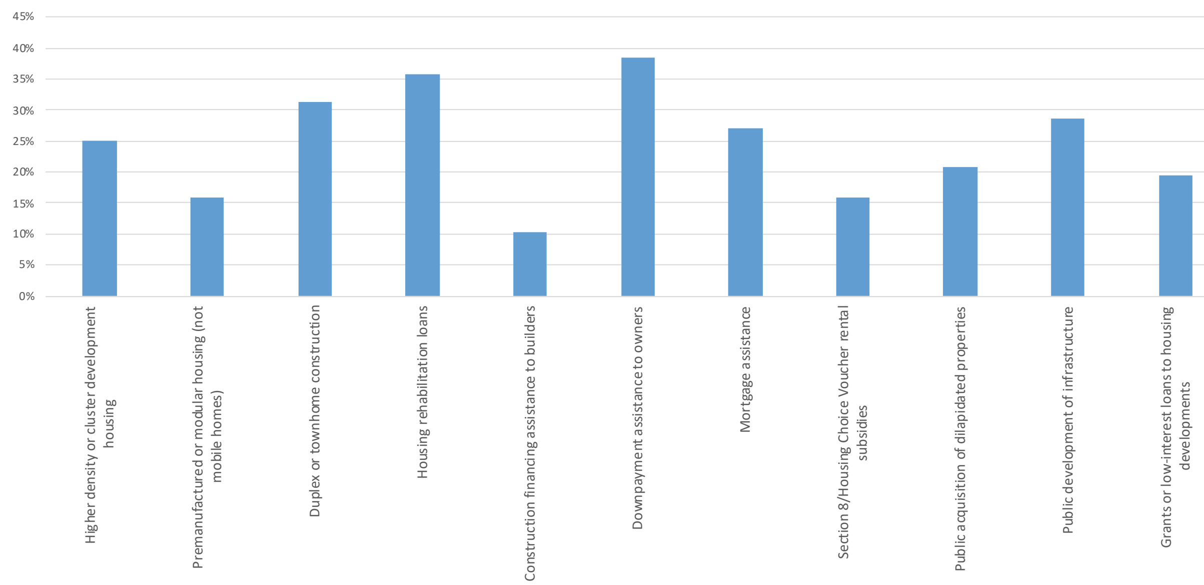


FIGURE 4.40: HOUSING SOLUTIONS SUPPORT TO REDUCE HOUSING COSTS IN JOHNSON COUNTY



LEAWOOD

Leawood stretches in a linear form north-south along the eastern county line. Nearly all the available land within the city limits has been developed. The housing stock is primarily single-family attached or detached units (90%).

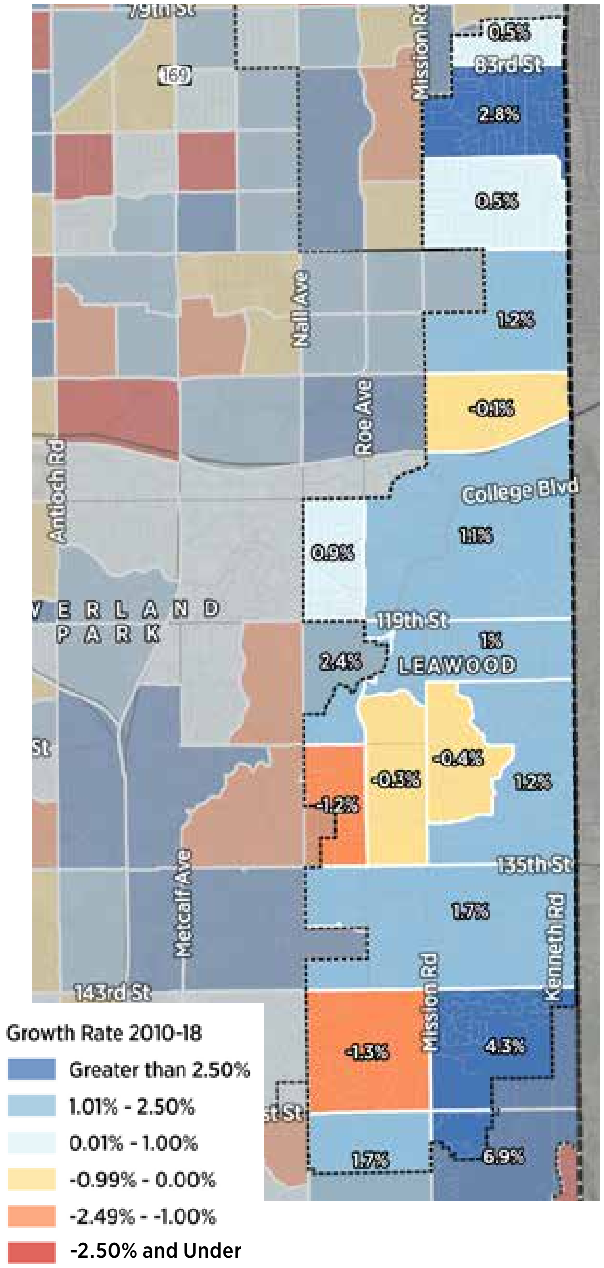
POPULATION CHANGE

Population growth in Leawood has been slowing in recent decades because of almost full buildout. The annual growth rate between 2000 and 2010 was 1.4% and dropped to 1.02% between 2010 and 2018. In general, spatial population changes between 2010 and 2018, shown in Map 4.32, reflect the greatest growth in census blocks at the north and south ends of the community.

GROWTH ANALYSIS

While Leawood has experienced growth since 1960, annual growth rates declining in the recent decade would be expected as available land declines. As a city stretched north and south that touches several other cities, growth in Leawood should remain at a consistent population in the future.

MAP 4.32: POPULATION GROWTH RATE 2010-2018 BY BLOCK GROUP, LEAWOOD

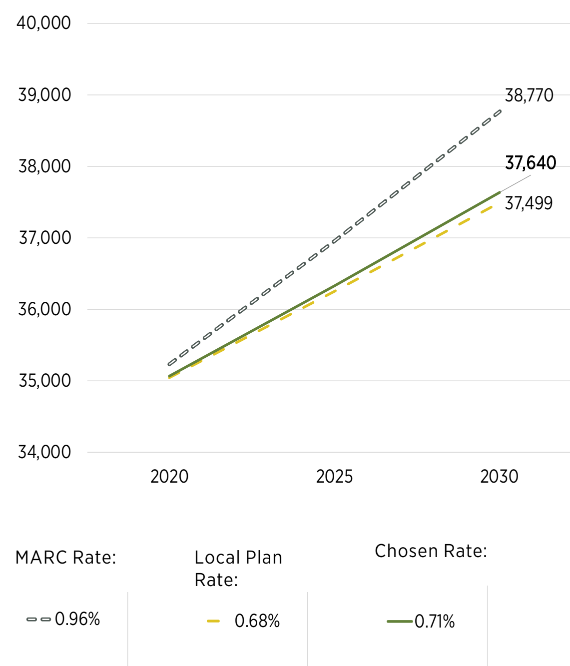


Source: American Community Survey (2018 5-year Estimates)

TEN-YEAR POPULATION FORECAST

Figure 4.41 shows population forecast scenarios through 2030. The rates of 0.96% and 0.68% are pulled from MARC and the city comprehensive plan projections. The construction rate since 2012 equals an annual population growth of about 0.5%. Under an average of the rates (0.71%), Leawood would see a 2030 population of 37,640 residents.

FIGURE 4.41: POPULATION GROWTH SCENARIOS, LEAWOOD



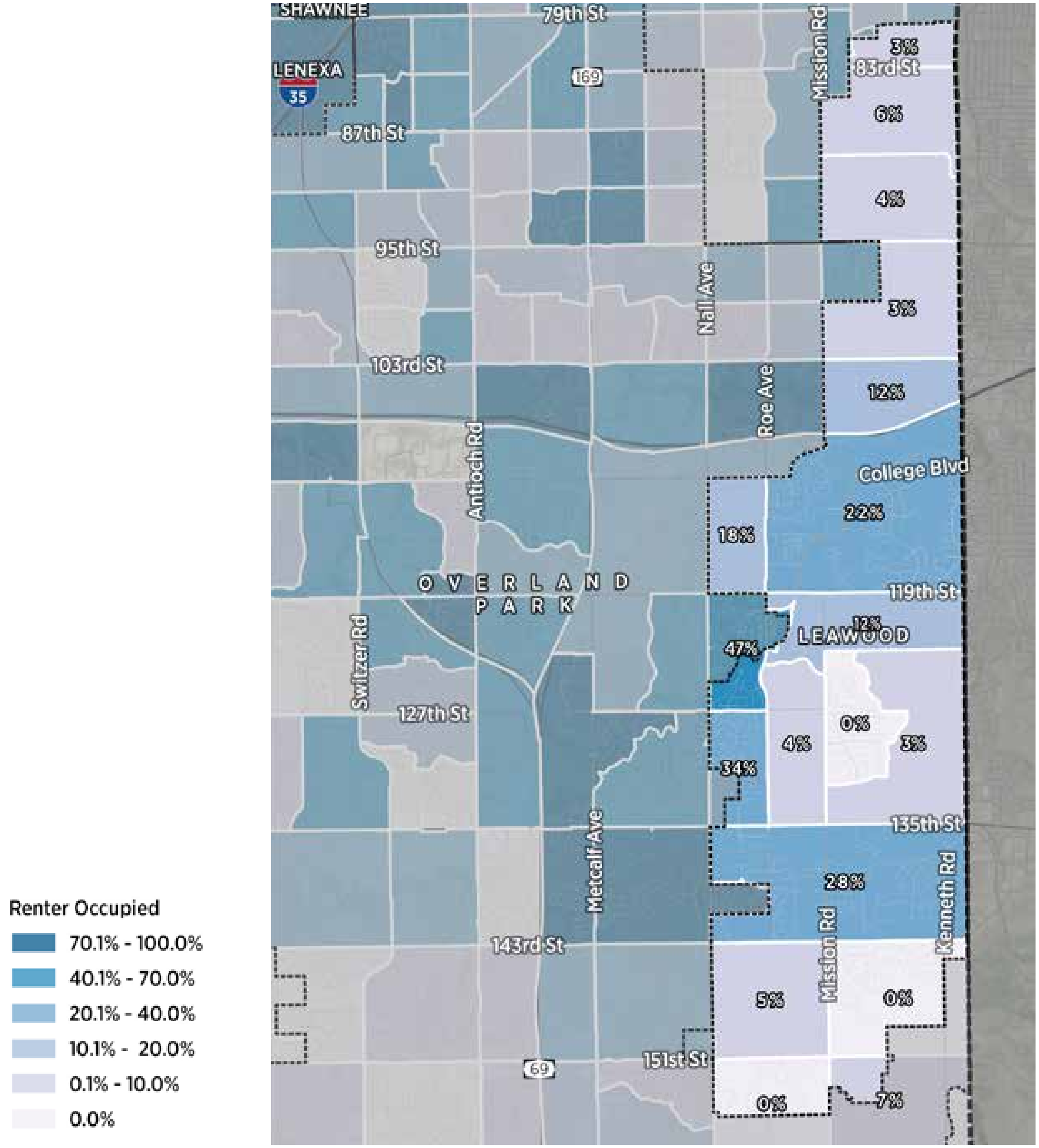
Source: U.S. Census; MARC; RDG Planning & Design

HOUSING OCCUPANCY

Map 4.33 shows the ratio of renters across Leawood.

- Across the city, about 90% of housing units are owner-occupied. This is a decrease of only 2% since 2010.
- Vacancy rates are quite stable citywide, at about 5% since 2010. A healthy market vacancy rate is around 6%.
- Household size is around 2.7 people per household, which is higher than most cities in Johnson County. Higher income families are living in Leawood.
- The few census blocks with renter housing are located in the center of the city. However, owner-occupied housing remains the largest share of housing in these blocks.

MAP 3.33: PERCENT RENTER OCCUPIED STRUCTURES, LEAWOOD



Source: American Community Survey (2018 5-year Estimates)

CONSTRUCTION ACTIVITY

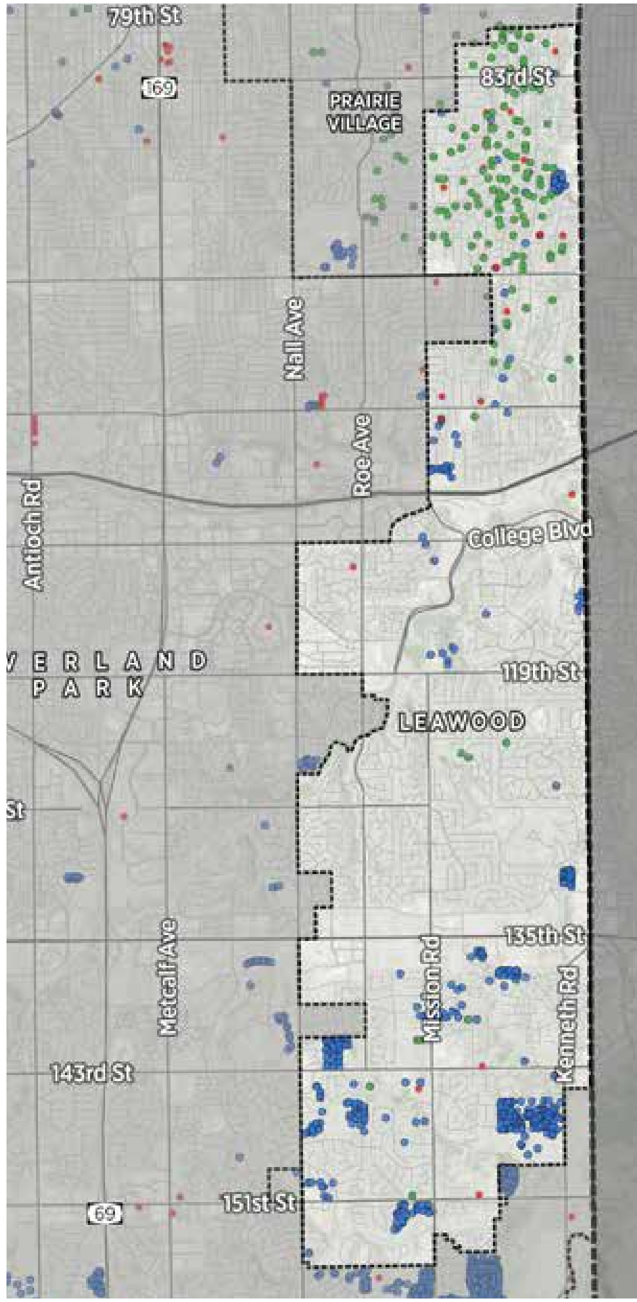
Like many cities, residential construction activity continues to increase since the Great Recession. **Map 4.34** shows the location of permits between 2012 and 2019:

- About 70% of 562 new units were single-family dwellings. Single-family construction has fluctuated over the years, declining since the 2013 peak with 128 units.
- Even with the current large ratio of owner-occupied units in the city, about 30% of new units were multi-family units which include apartments, townhomes, and any structure with more than two units. Most of these units are higher end market rate units in multi-story complexes.
- Demolitions without rebuilding were relatively non-existent. The demolitions that did occur are mostly because of rebuilds on the same lot.

"I feel that Leawood and Overland Park need more variety in housing options, offering lower income options or multi-use facilities to create more diversity."

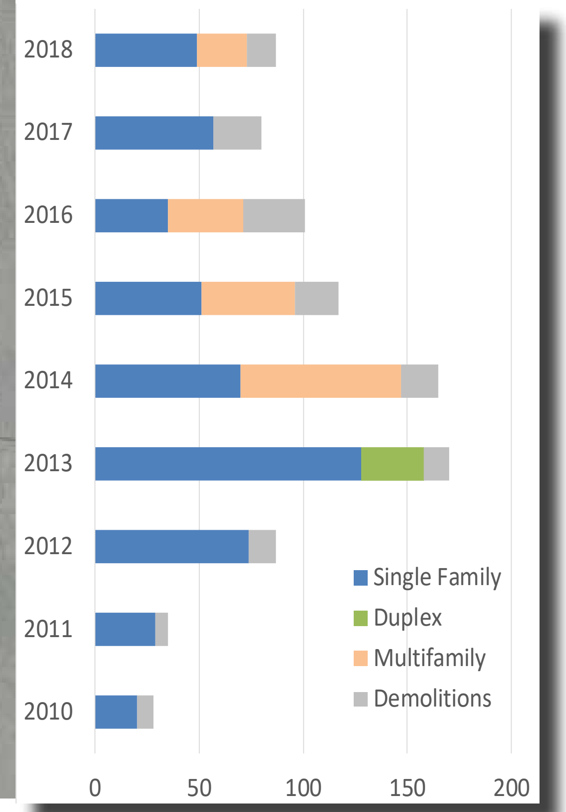
- Survey Respondent

MAP 4.34: RESIDENTIAL NEW CONSTRUCTION PERMITS BY LOCATION (2010-2019), LEAWOOD



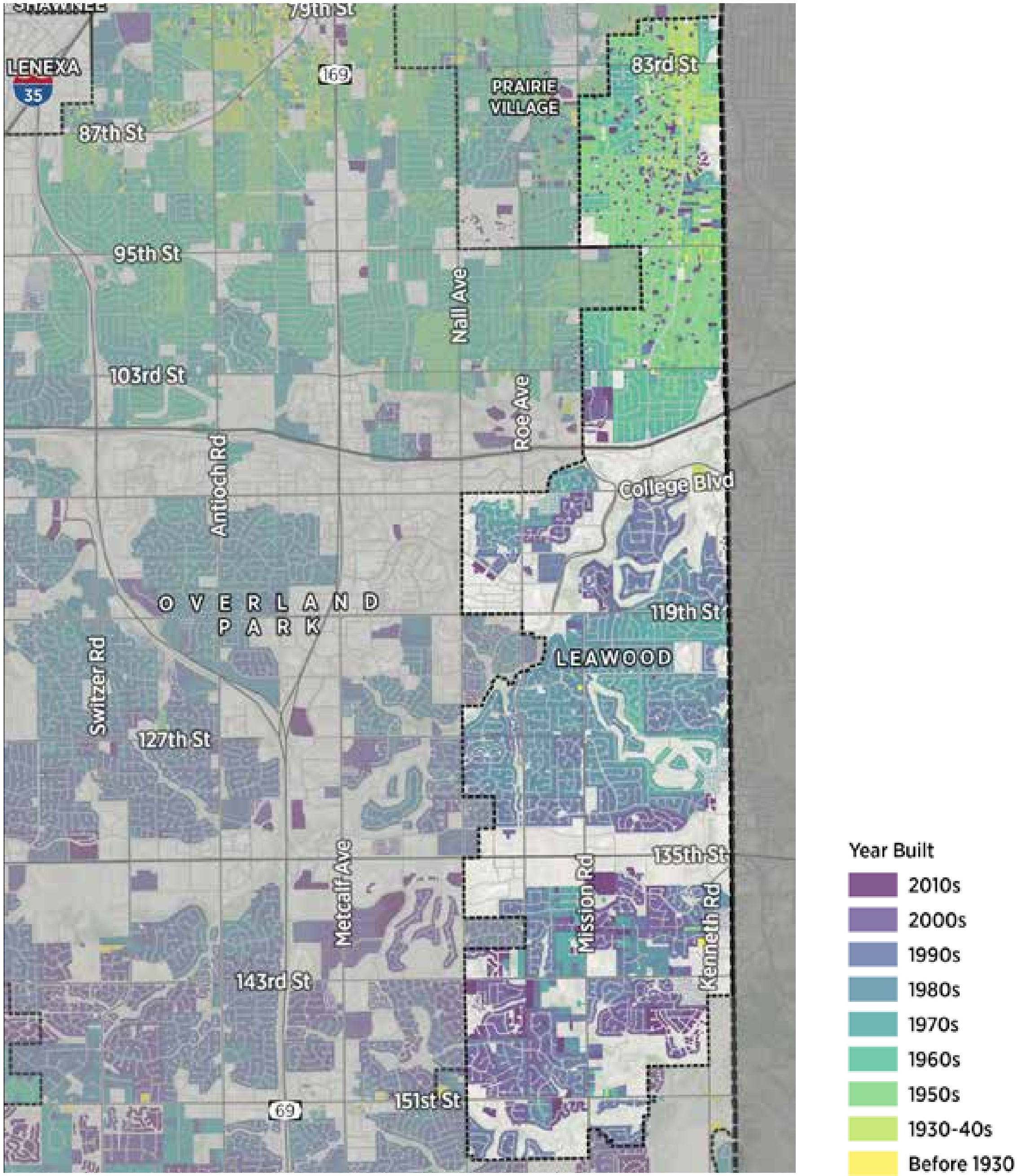
Source: Johnson County GIS Department

FIGURE 4.42: RESIDENTIAL DEVELOPMENT PERMITS BY YEAR



Source: City of Leawood

MAP4.35: AGE OF HOUSING STOCK, LEAWOOD



Source: Johnson County GIS Department, Assessor Data

AGE OF HOUSING

Map 4.35 shows the year built of residential dwellings. The age of housing provides preliminary insight into areas more susceptible to deterioration and additional homeowner costs. If these areas are also occupied by lower income households then monitoring of rehabilitation needs is even more important.

- Leawood has a fairly modern housing stock. About 65% were built after 1980.
- Few homes were built before 1950 at about 16%. These are the homes typically in the most need of repairs and at risk of falling into dilapidation. However, in Leawood they tend to be in good repair and high value for purchase by investors.

HOUSEHOLD INCOME

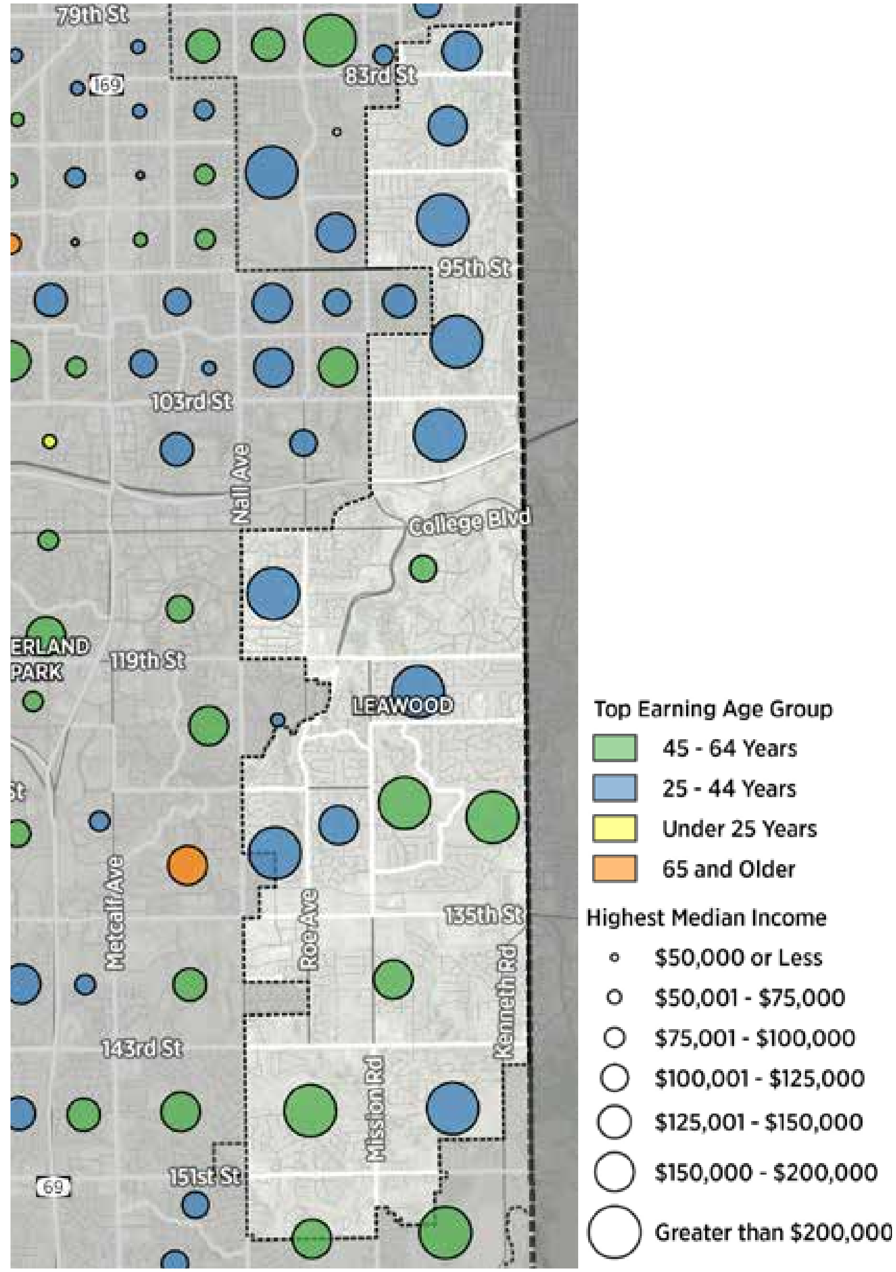
Map 4.36 provides an overview of Leawood's estimated household incomes:

- Median household income is $149,736, the 3rd highest in the county. Median income rose by 15% since 2010.
- There is a geographic split between top earning age group. North of I-435, the top earners are between the age of 25 and 44, while south is 45-64 year olds.
- Household income levels correlate with the locations of the highest home ownership.

"I live in Leawood where housing prices are simply becoming out of reach for MOST Americans....We are now retired and on fixed incomes. I would like to see Kansas provide something like the Homestead Exemption that is available in TX where older home owners who have been in their homes for years are given a fixed amount of property tax. It would allow people to age in place and provide peace of mind for the elderly and their families."

- Survey Respondent

MAP 4.36: HOUSEHOLD INCOME OF TOP EARNING AGE GROUP, LEAWOOD



Source: American Community Survey (2018 5-year Estimates)

HOME SALES

How quickly homes sell in a market is a leading indicator of housing demand and supply. **Figure 4.43** shows home sales data from 2017-2019.

- Leawood's market is unique in that home prices spiked in 2018 and dropped back down again in 2019. This could be a result of the inventory that was available. Nonetheless, the sale price is above that in many other cities in Johnson County.
- Average days on market have remained fairly consistent. However, the number of units sold dropped significantly in 2019.

FIGURE 4.43: SINGLE FAMILY HOME SALES, LEAWOOD

Source: Multiple Listings Service (2017-2019)

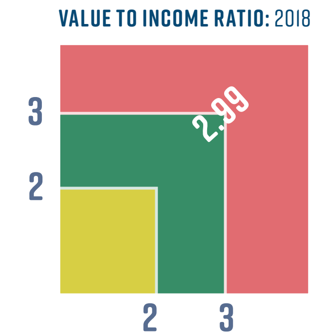
HOUSING ATTAINABILITY AND SUPPLY ANALYSIS

By comparing the distribution of household incomes with housing costs, a picture of supply and demand emerges across all of Leawood's housing market. **Figure 4.44** examines supply and demand through the lens of what is "affordable" to different income groups to answer the question: is there an adequate supply of housing options available for residents of different income groups?

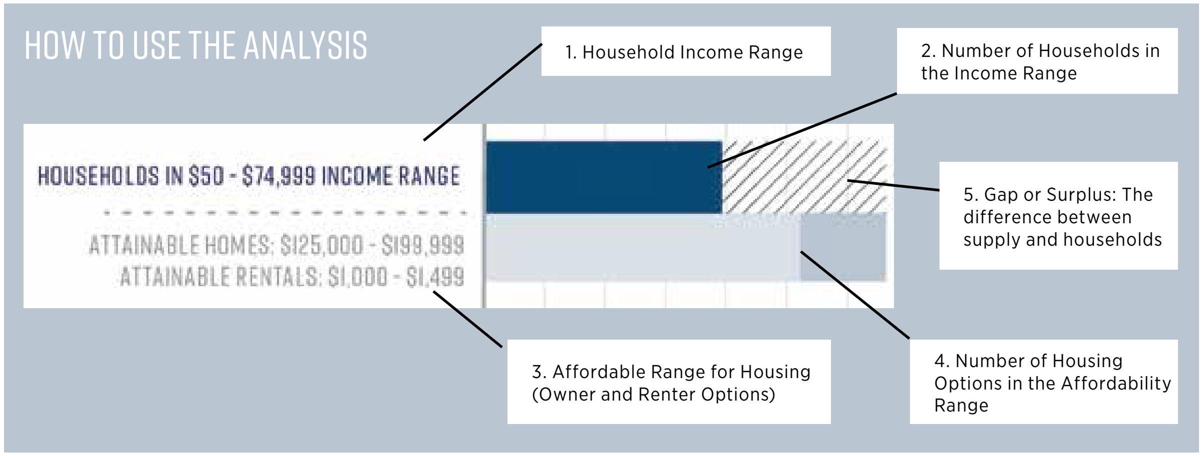
Figure 4.44 illustrates five major components in pursuit of the above story:

1. **Income Ranges.** The starting point of the analysis is the spectrum of incomes across all residents of Leawood. From these incomes, corresponding "affordable" housing prices are established for ownership and rental opportunities.
2. **Number of Households in Each Income Range.** The number of households in each income range is the demand; these residents seek housing options in Leawood that are affordable to them.
3. **Affordability Ranges.** An affordable ownership home is calculated at 2-3 times the household income depending on the income range. Lower income households tend to spend a higher percentage of their income on housing and higher income households tend to spend a lower percentage of their total income on housing. An affordable rental would be about 20% of household income.
4. **Number of Housing Units in Each Affordability Range.** The number of housing units in each affordability range is the supply of affordable options.
   - Composition of Housing Supply. This illustrates the share of the supply met by ownership and renter housing options.
5. **The Balance of Supply and Demand.**
   - If the number of households exceeds the number of units available, those households must seek options in different affordability ranges.
   - If the number of units exceeds the number of households, it indicates that the units are occupied by households in different income ranges.
   - **This analysis is meant to illustrate larger trends in how existing units are being occupied. It does not demonstrate exact market demand in certain price ranges.**

VALUE TO INCOME BENCHMARK



A healthy, self-sustaining housing market will have a value to income ratio between 2 and 3. Leawood has a value to income ratio of 2.99, at the range where incomes and values start to show broad unaffordability.



The analysis in **Figure 4.44** is based on all the households today that are occupying a unit. No household is without a unit.

FIGURE 4.44: HOUSING ATTAINABILITY, LEAWOOD (2018)

Source: American Community Survey (2018 5-year Estimates); RDG Planning & Design

The greatest shortage is for households making below $100,000. This segment relies on the existing housing stock some which is being occupied by higher income households.

- The greatest shortage is for households making below $100,000. This segment is supplied by existing housing stock, some which is being occupied by higher income households. However, many of these homes are also captured by retirees with low incomes that may already have a high value home paid off. For example:
  - 31% of all owner-occupied households in Leawood are over the age of 65.
  - The median household income for households over 65 is estimated around $99,000, meaning that 50% of those households make less than $99,000.
  - 58% of owner-occupied households over the age of 65 do not have a mortgage.
  - Over 2,300 households making less than $100,000 a year are living in owner-occupied units priced above $250,000, or 20% of all households in owner-occupied homes.

- There are many units attainable for households making more than $100,000. This is not a bad thing, but some of these units are occupied by lower income groups spending more than 30% of their incomes on housing. Others are retirees with paid of homes.
- About 500 households making over $100,000 a year are living in owner-occupied units priced below $250,000.
- They do this for a variety of reasons, including housing cost and neighborhood preferences in addition to a lack of other options above this price range.

COST BURDENED RESIDENTS

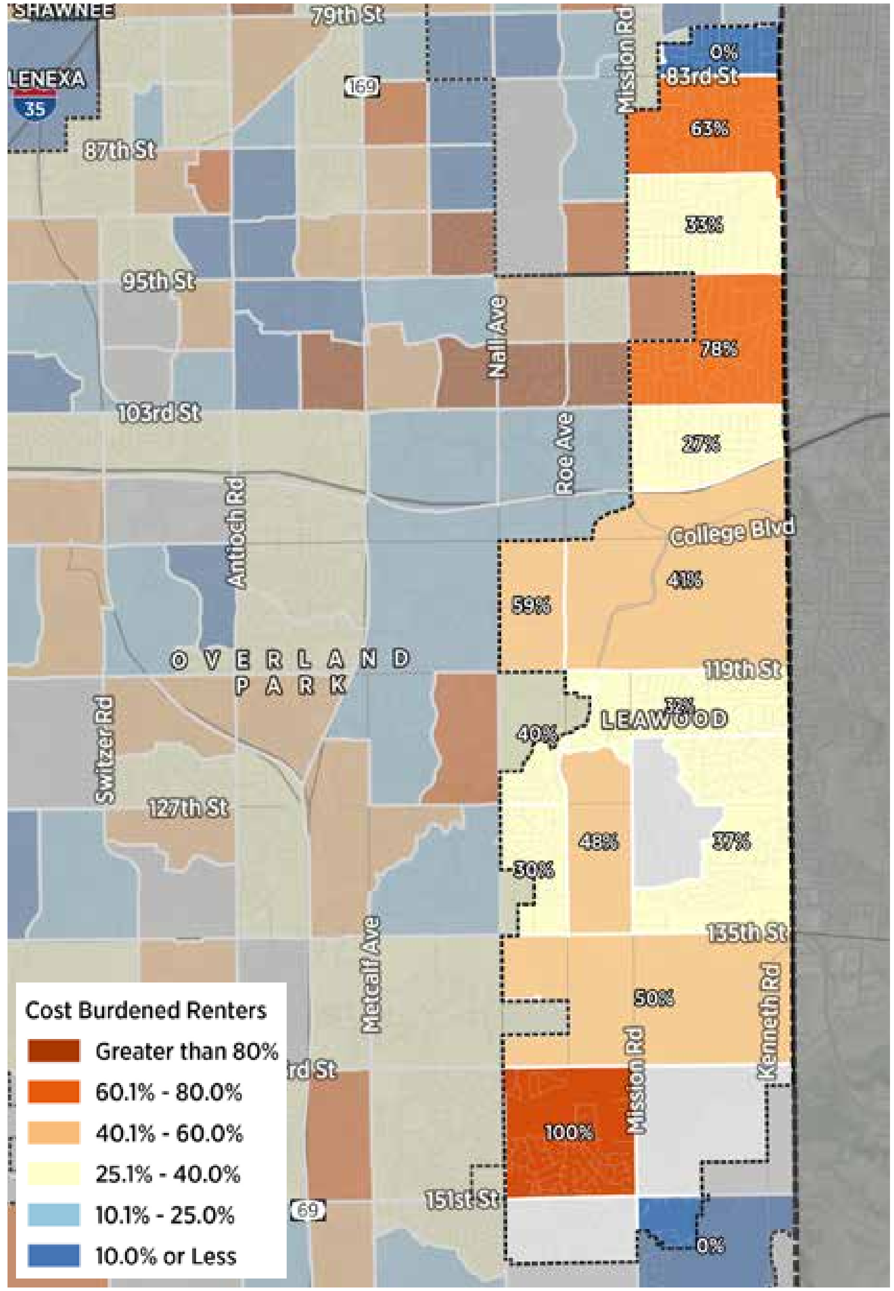
Maps 4.37 and 4.38 illustrates the level of cost-burdened households. According to the U.S. Government, households spending more than 30% of their income on housing are considered cost-burdened.

- Median contract rents are the second highest in the region at $1,574. This rate is up from $1,371 in 2010.
- Approximately 49% of Leawood's households living in renter housing spend more than 30% of their income on gross rent. One census block in the southern end of the community shows 100% cost-burdened renters.
- Rental unit prices are not expected to decline in Leawood, and there may be other reasons that incomes do not appear to align with rental ranges.

"Housing in Leawood is unaffordable for most people and we are land locked, so not much room to grow. Teachers, public service workers, etc can't afford to live where they work."

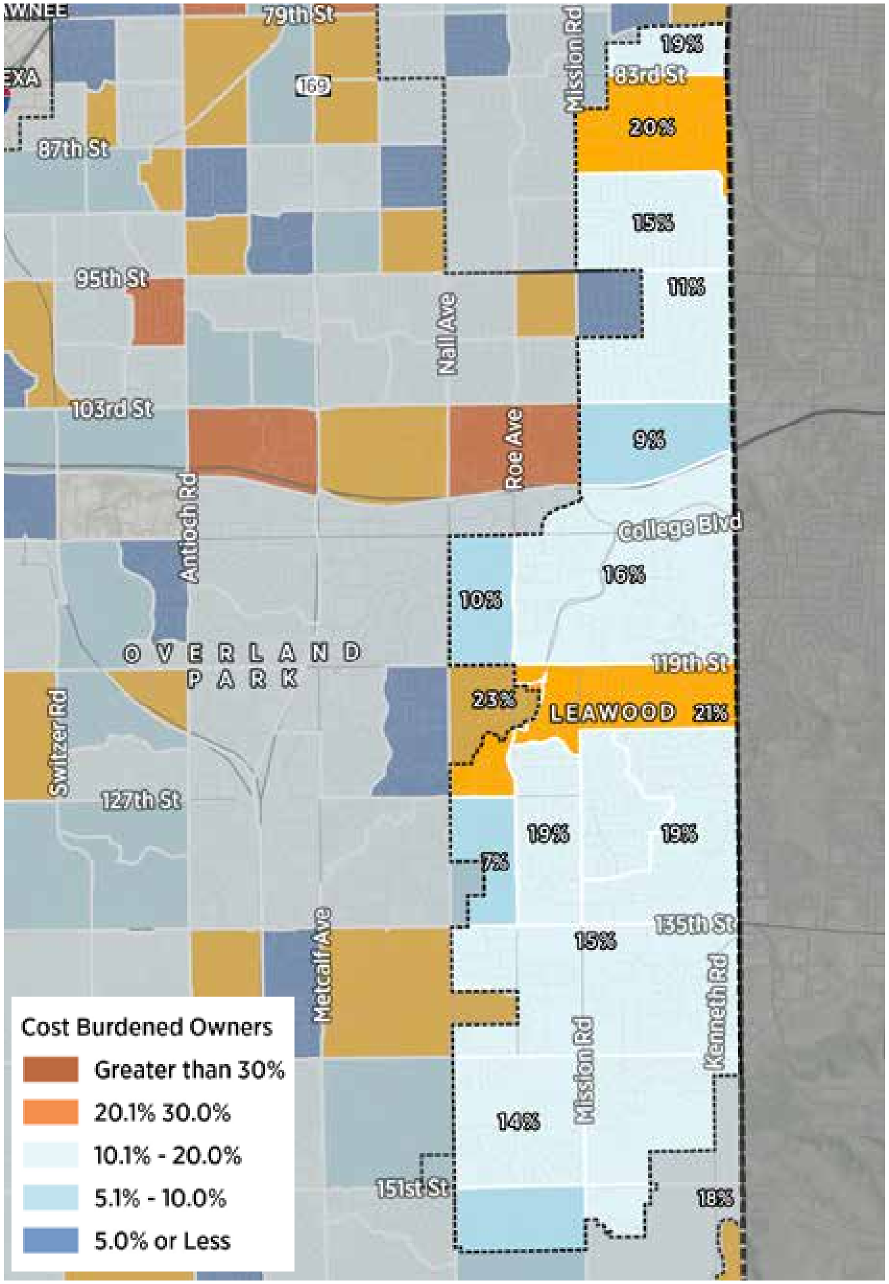
- Survey Respondent

MAP 4.37: PERCENT OF RENTER-OCCUPIED COST BURDENED HOUSEHOLDS, LEAWOOD



Source: American Community Survey (2018 5-year Estimates)

MAP 4.38: PERCENT OF OWNER-OCCUPIED COST BURDENED HOUSEHOLDS, LEAWOOD



Source: American Community Survey (2018 5-year Estimates)

- Median home values are the 4th highest in the county at $447,100, up 16% since 2010.
- About 20% of households living in owner-occupied housing spend more than 30% of their income on housing.

HOUSING DEMAND

The housing demand analysis builds on the population projections, housing trends, and community conversations to forecast the demand for additional housing. The model is built on the following assumptions with a 0.85% growth rate:

- The proportion of the household population (those living in households and not in skilled nursing or prisons) will remain stable through 2030.
- Average people per household slightly increases over the next decade as a higher proportion of single-family homes are brought online. Some growth may occur as Millennials move into their childbearing years, but Baby Boomer households will also continue to shrink.
- Unit demand at the end of the period is calculated by dividing household population by the number of people per household. This equals the number of occupied housing units.
- A manageable housing vacancy provides housing choices for residents moving to the community. As noted earlier, the city's current vacancy rate is stable and could increase slightly. The rate is held at 5% through 2030.
- Unit needs at the end of each period are based on the actual household demand plus the number of projected vacant units.

FIGURE 4.45: HOUSING DEMAND MODEL, LEAWOOD

	2020	2025	2030	TOTAL
POPULATION AT END OF PERIOD	35,064	36,329	37,640	
HOUSEHOLD POPULATION AT END OF PERIOD	35,052	36,317	37,627	
AVERAGE PEOPLE PER HOUSEHOLD	2.70	2.73	2.75	
HOUSEHOLD DEMAND AT END OF PERIOD	12,982	13,327	13,683	
PROJECTED VACANCY RATE	5.0%	5.0%	5.0%	
UNIT NEEDS AT END OF PERIOD	13,665	14,029	14,403	
REPLACEMENT NEED (TOTAL LOST UNITS)		60	60	120
CUMULATIVE NEED DURING PERIOD		423	434	857
AVERAGE ANNUAL CONSTRUCTION		85	87	86

Source: RDG Planning & Design

- Replacement need is the number of housing units demolished or converted to other uses. The number of units lost annually is based on historic demolition rates which are typically rebuilds for a new structure.
- Cumulative need shows the number of total units needed between the base year of 2020 and the year indicated at the end of the period.

Figure 4.45 shows an average annual construction need of 86 units. The average annual construction rate from 2012 to 2019 was 70 units, with a high of 146 in 2013 and a low of 17 in 2019. Recent growth has been primarily single-family dwellings. Some of the forecast 86 units are rebuilds on existing lots and some potential redevelopment for multi-family units.

FIGURE 4.46: HOUSING DEVELOPMENT PROGRAM, LEAWOOD

	2025		2030		2020-2030	
TOTAL OWNER OCCUPIED						
ATTAINABLE: <$200,000	72	360	65	326	137	685
MODERATE MARKET: $200-250,000	29		26		56	
MARKET: $250-350,000	68		62		130	
HIGH MARKET: OVER $350,000	191		172		363	
TOTAL RENTER OCCUPIED						
ATTAINABLE: LESS THAN $1,000	33	63	56	109	89	172
MARKET: $1,000-1,500	16		27		42	
HIGH MARKET: $1,500+	15		26		41	
TOTAL NEED		423		434		857

Source: RDG Planning & Design

DEVELOPMENT PROGRAM

Building on the housing demand model, the development program forecasts production targets for owner and renter-occupied units based on the following assumptions:

- Owner-occupied units will be distributed roughly in proportion to the income distributions of the households for whom owner occupancy is an appropriate strategy.
- Most low-income residents will be accommodated in rental units.
- The county's supply is currently dominated by owner units. Over the last several years, the vast majority of new units have been in owner configurations. Over the next ten years, production levels need to balance to provide the housing variety necessary for a growing population. Therefore, the model illustrated in **Figure 4.46** targets a split of 85% owner- and 15% renter-occupied units through 2025, dropping to 75%-25% through 2030.
    - › Approximately 193 additional owner-occupied units should be priced below $250,000. This demand will come through the city's existing housing stock being freed up through move-up housing, or products that do not fit the traditional detached single-family homes.
    - › About 89 rental units will need to be produced with rents below $1,000 per month. These units will have to be generated through subsidy programs like low-income housing tax credits.

COMMUNITY PERCEPTIONS

SURVEY

A total of 209 residents of Leawood took the community survey made available online and in paper form. From their responses the following themes emerged:

- All housing types, except large lot residential housing, ranked high as product types likely to be successful in Leawood. Highest on the rankings were mid-size 3 bedroom houses and independent senior living housing.
- Respondents felt the housing supply in Leawood only matched that of Johnson County for families with children, multi-generational families, and empty-nesters. The remainder of household types were less provided for in Leawood.
  - › The housing supply for people with physical and/or mental disabilities, students, and especially low wage workers and households needing access to transit, ranked low.
- When asked about solutions they would support to reduce housing costs in Johnson County, duplex or townhome constructed ranked the highest, but only with 41% support.
- The majority of respondents did not look to move within the past three years. Of those that did, 37% were searching for an owner-occupied unit and 5% a rental.
  - › For those looking for owner units, a shortage was perceived nearly equally for all cost brackets under $300,000.

FIGURE 4.48: DECISION TO MOVE IN PAST 3 YEARS

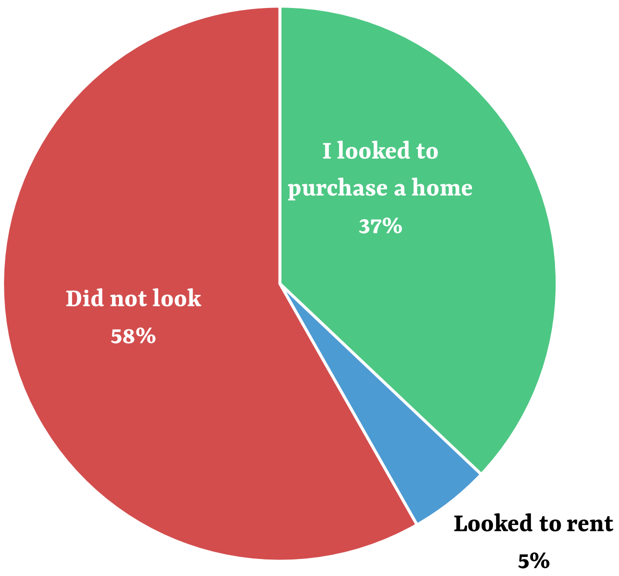
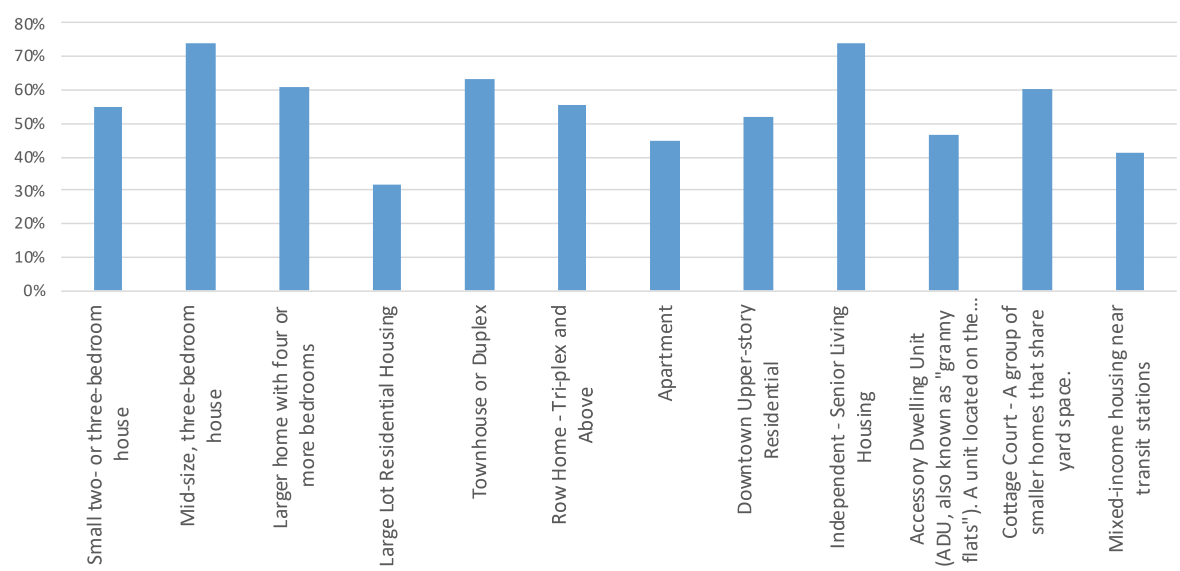


FIGURE 4.47: HOUSING TYPES LIKELY TO BE SUCCESSFUL IN THE CITY



LISTENING SESSIONS

Many people familiar with the housing market specific to Leawood participated in small group discussions. These included representatives from the City Council, Planning Commission, and real estate agents, among others.

COMMON COMMENTS

Aside from common themes in Chapter 2 that pertain to the entire county, several common comments are apparent to Leawood.

- Leawood has limited land available for new development, which drives up costs and requirements for development.
- High end villas are a popular product recently and attract empty-nesters from around Johnson County but many older people currently living in Leawood cannot afford them.
- Increasing property valuations for 25+ year old homes are a concern for many that want to age in place without moving to a new villa.
    - Many referenced a need to change the senior property tax relief program rules that a home must be valued less than $350,000 in order to be eligible.

FIGURE 4.49: HOUSING SUPPLY CURRENTLY MEETS THE NEEDS OF THE FOLLOWING HOUSEHOLD TYPES

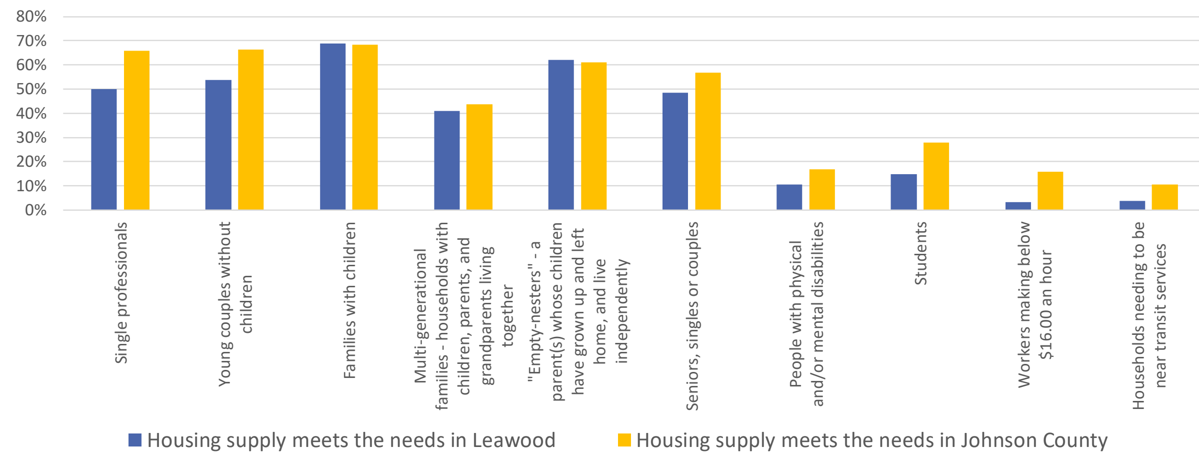
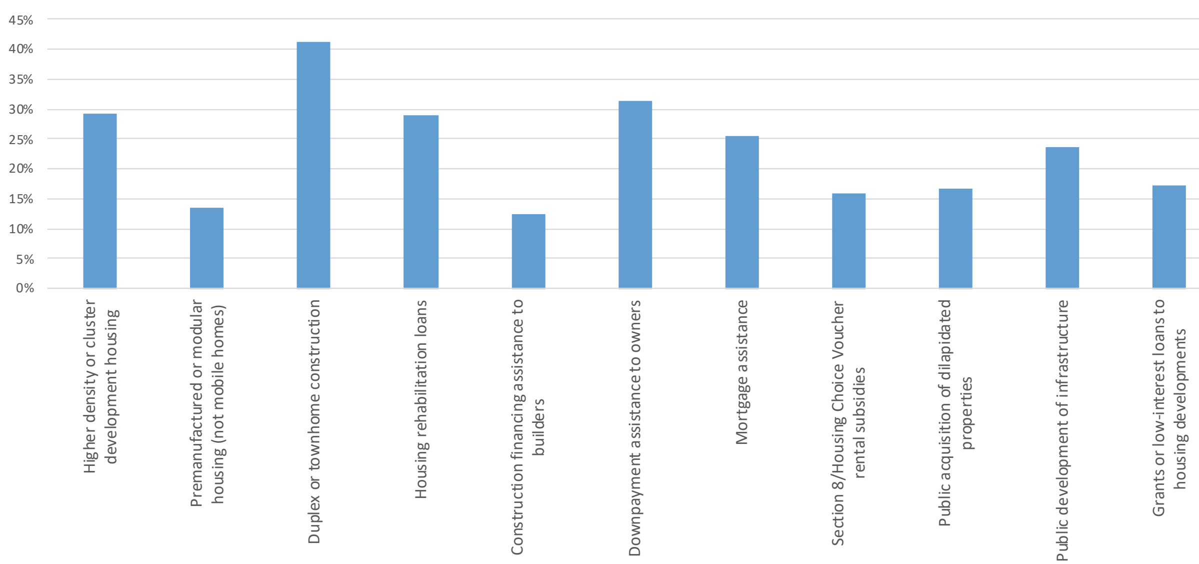


FIGURE 4.50: HOUSING SOLUTIONS SUPPORT TO REDUCE HOUSING COSTS IN JOHNSON COUNTY



PRAIRIE VILLAGE

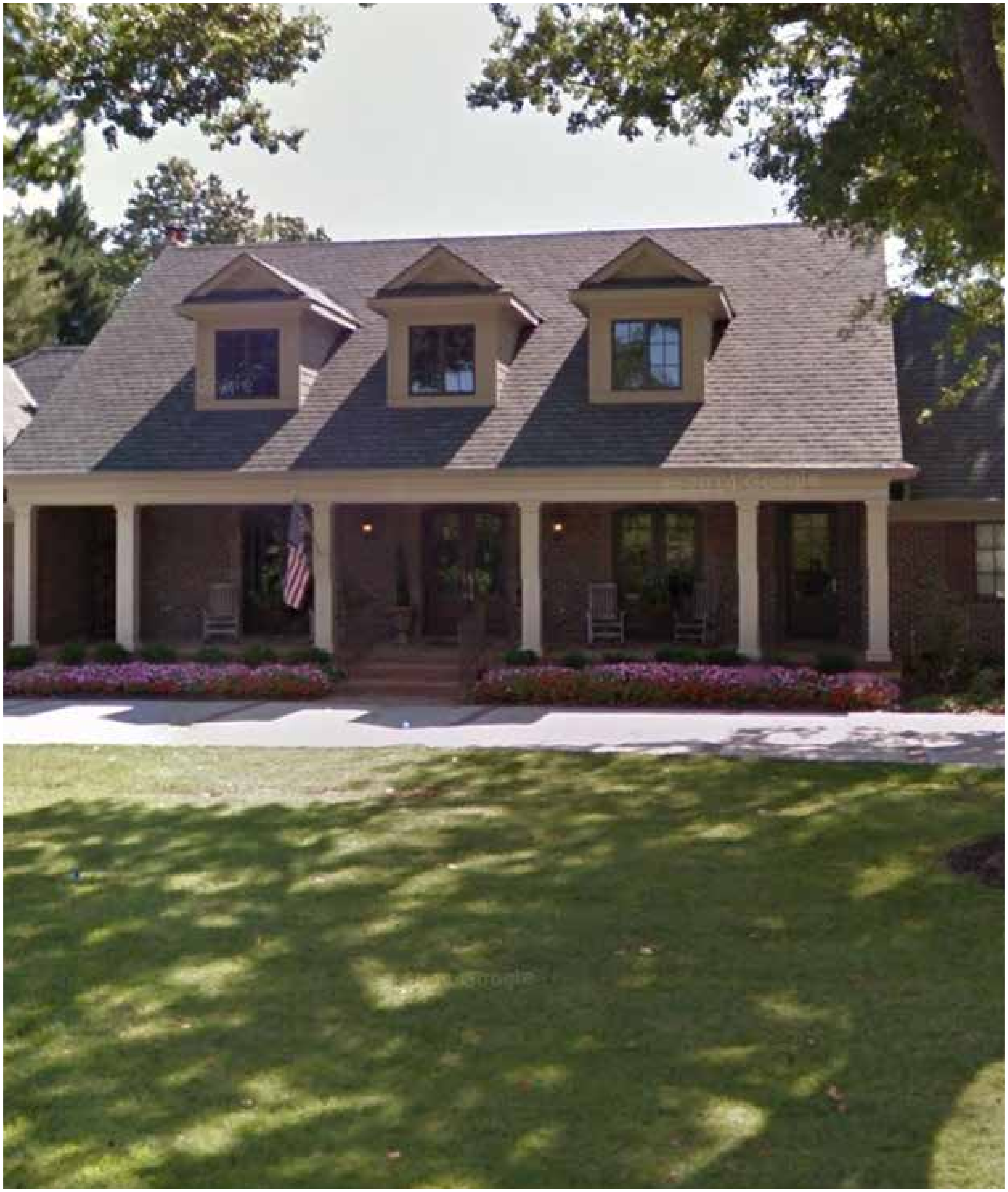
Prairie Village is located in the northeast end of Johnson County and is landlocked. The community is fully developed with no available areas suitable for new development. Therefore, redevelopment possibilities are the only option for new housing accommodations in the future.

POPULATION CHANGE

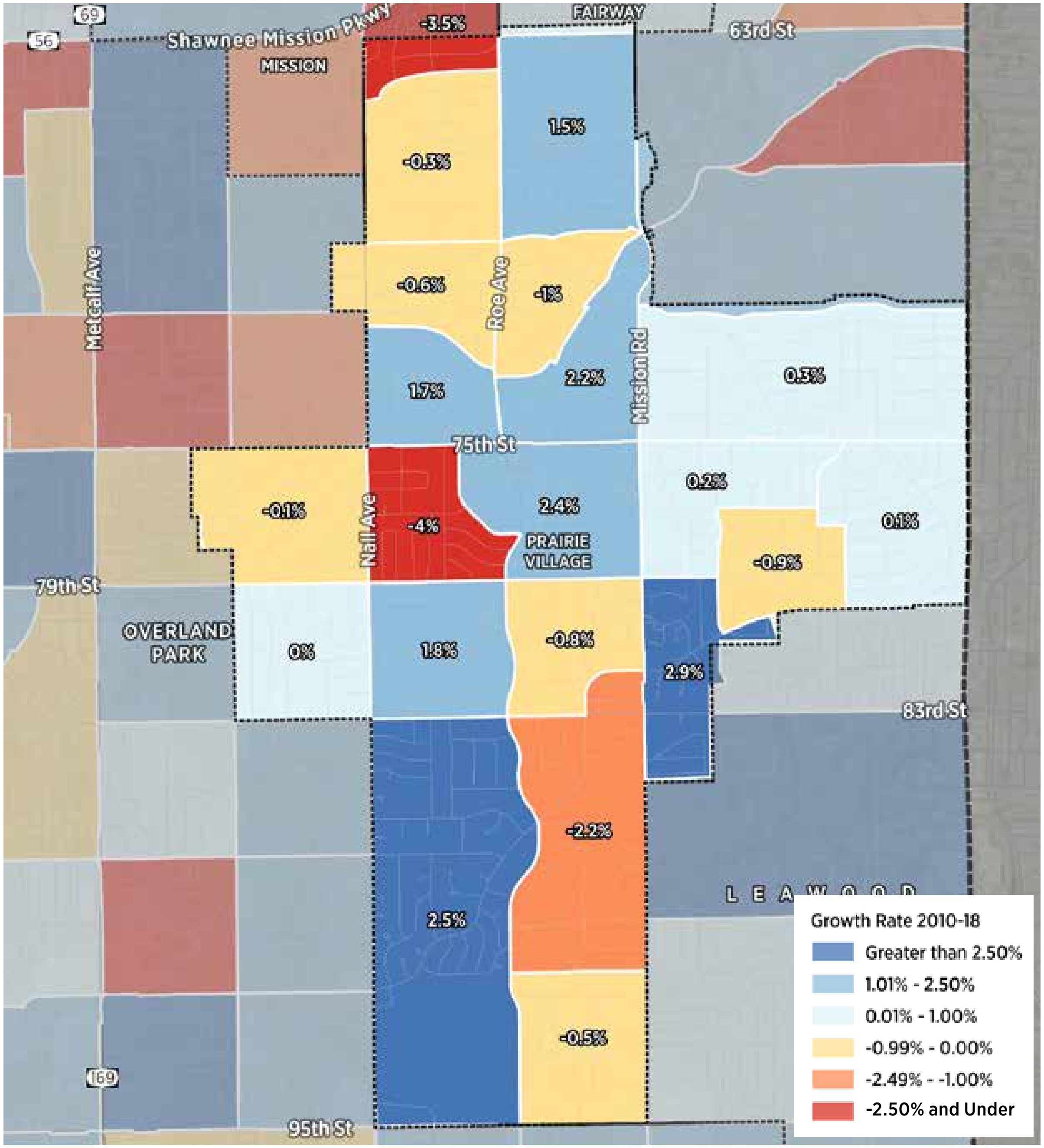
Population change in Prairie Village has varied since 1960, primarily with a loss in population which began in 1970. **Map 4.39** illustrates the areas where population loss is the greatest and areas where growth is occurring since 2010.

GROWTH ANALYSIS

Despite population losses since the 1970s, new construction in single-family and two-family units with the removal of structures supported a slight increase in population since 2010 for Prairie Village.

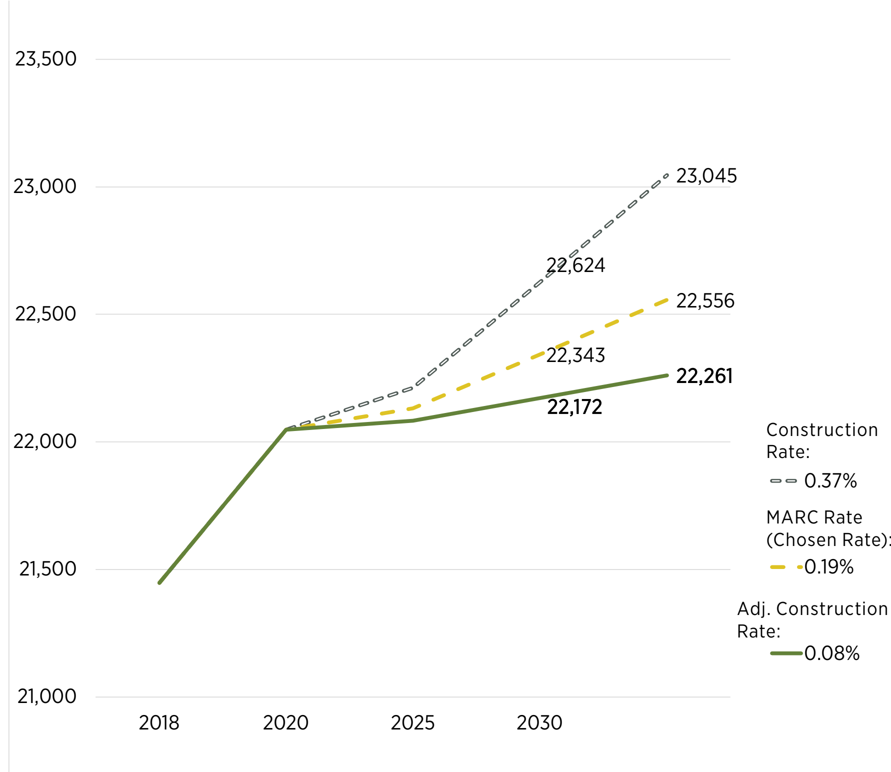


MAP 4.39: POPULATION GROWTH RATE 2010-2018 BY BLOCK GROUP, PRAIRIE VILLAGE



Source: American Community Survey (2018 5-year Estimates)

FIGURE 4.51: POPULATION GROWTH SCENARIOS, PRAIRIE VILLAGE



Source: U.S. Census; MARC; RDG Planning & Design

TEN-YEAR POPULATION FORECAST

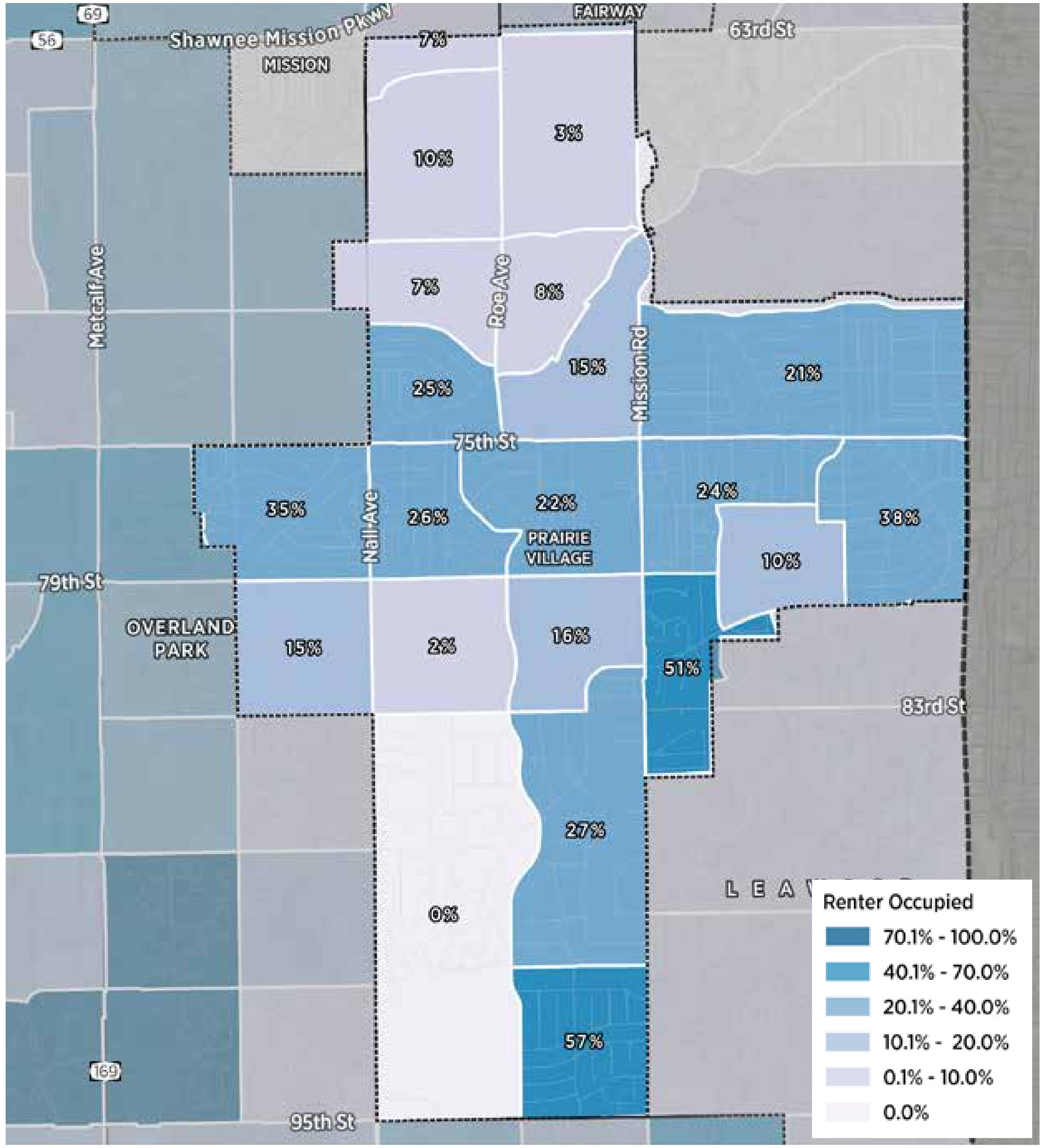
Figure 4.51 shows population forecast scenarios through 2030. MARC projects an annual growth rate of 0.19%. Construction rates since 2010 when accommodating for demolished units would indicate about a 0.37% population growth rate. When excluding a sizable mixed-use redevelopment in 2016, the construction growth rate is about 0.08%. Therefore, the MARC growth rate is used for planning purposes, understanding that average growth is not steady and based mostly on redevelopment projects.

HOUSING OCCUPANCY

Map 4.40 shows the ratio of renters across Prairie Village.

- Across the city, about 78% of housing units are owner-occupied. This is a decrease from about 81% in 2010.
- Vacancy rates citywide have slowly increased since 2000 from a low of about 3% to a 2018 estimate at 6.8%. A healthy market vacancy rate is around 6%.
- Household size is around 2.25 people per household.
- Renter occupancy tends to cluster at the edges of the city, with the largest census block concentrations in the south and southeast section of Prairie Village. However, the recent redevelopment at the Market at Meadowbrook in southwest Prairie Village is not captured in the most recent data.

MAP 4.40: PERCENT RENTER OCCUPIED STRUCTURES, PRAIRIE VILLAGE



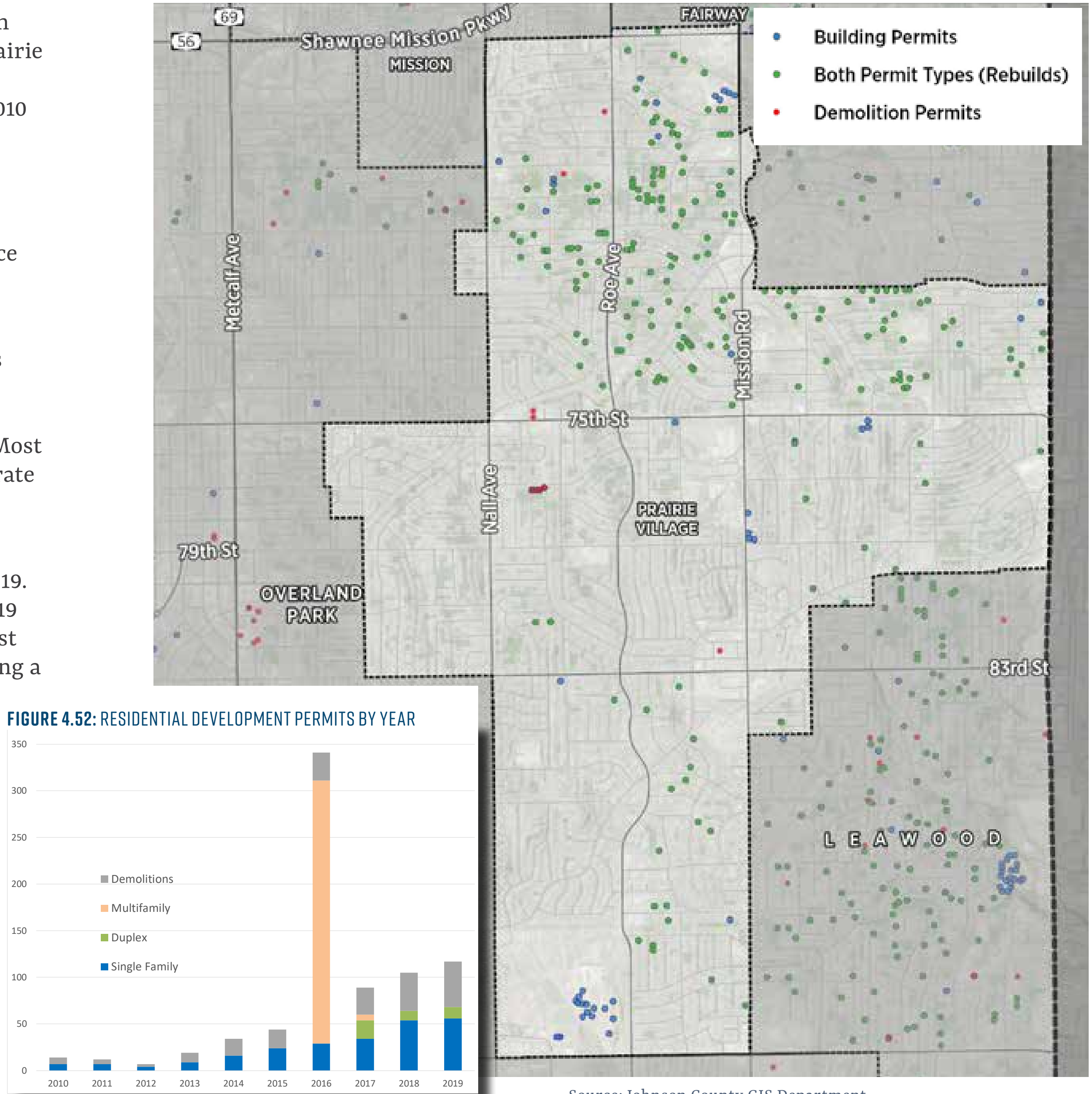
Source: American Community Survey (2018 5-year Estimates)

CONSTRUCTION ACTIVITY

Like many cities, residential construction activity continues to increase, but for Prairie Village in the form of rebuilds. **Map 4.41** shows the location of permits between 2010 and 2019:

- About 42% of new units were single-family dwellings. Single-family construction has increased slowly since 2010 with a jump from 34 to 54 units between 2017 and 2018.
- About 58% of new units were duplexes or multi-family units which include apartments, townhomes, and any structure with more than two units. Most of these units are higher end market rate units built since 2016.
- Demolitions were relatively high with almost 50 demolitions occurring in 2019. The average rate between 2010 and 2019 was 21 units demolished annually. Most of these demolitions were for rebuilding a larger home on the site.

MAP 4.41: RESIDENTIAL NEW CONSTRUCTION PERMITS BY LOCATION (2010-2019), PRAIRIE VILLAGE



Source: Johnson County GIS Department

FIGURE 4.52: RESIDENTIAL DEVELOPMENT PERMITS BY YEAR

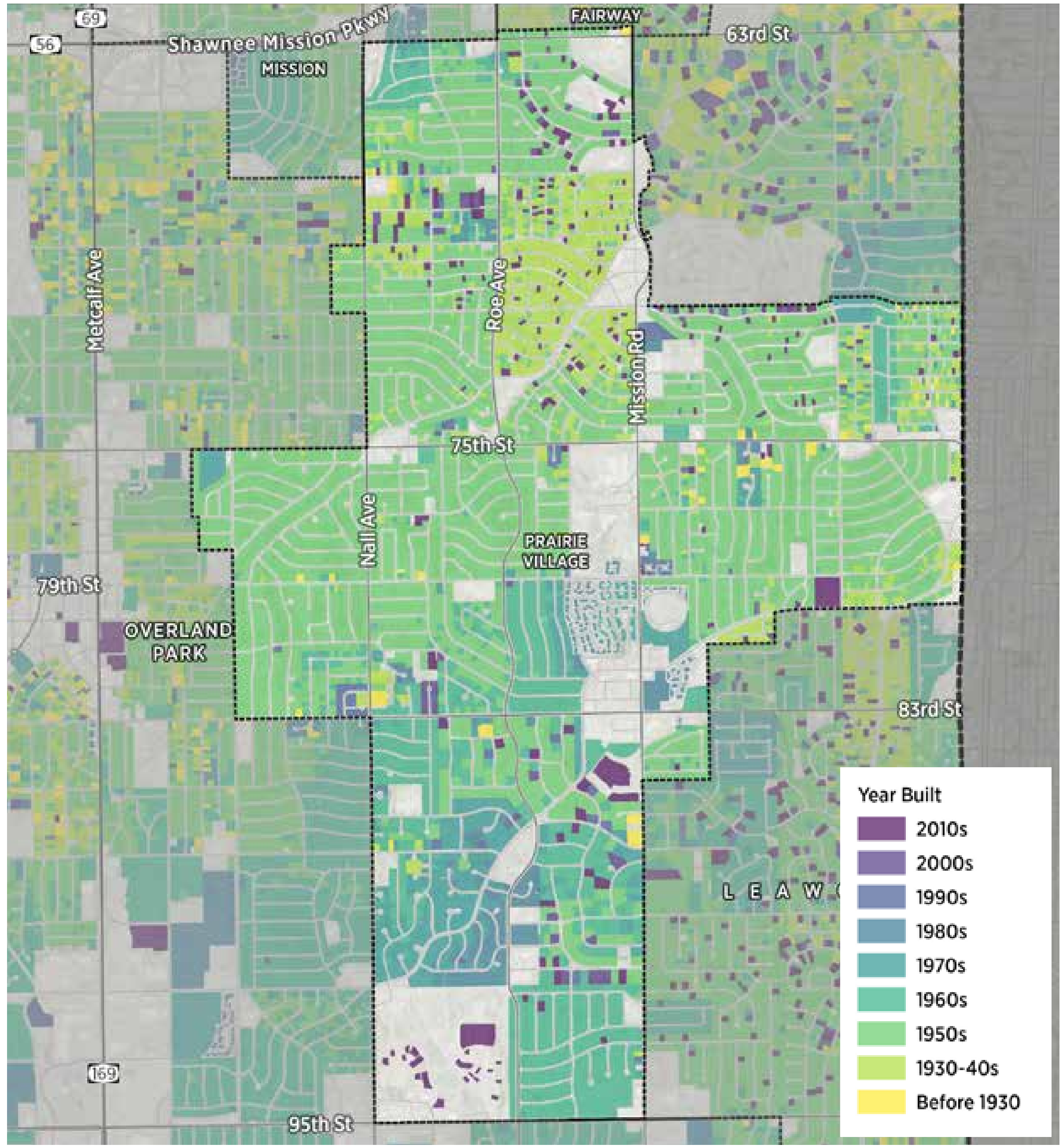
Source: City of Prairie Village

AGE OF HOUSING

Map 4.42 shows the year built of residential dwellings. The age of housing provides preliminary insight into areas more susceptible to deterioration and additional homeowner costs. If these areas are also occupied by lower income households then monitoring of rehabilitation needs is even more important.

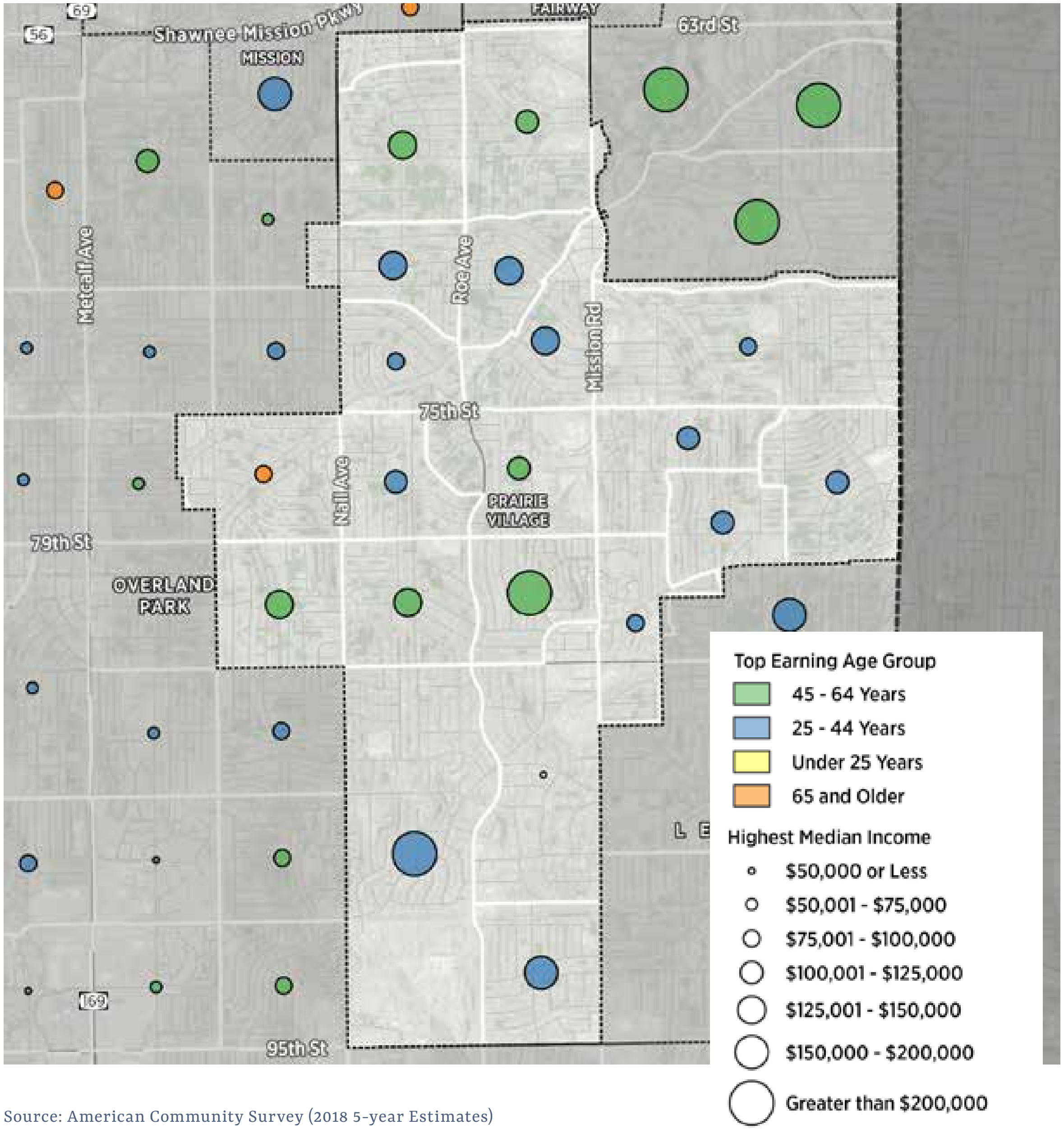
- Prairie Village has a surprisingly older housing stock. Between 1940 and 1960, 61% of the housing stock was constructed with an additional 18% between 1960 and 1969.
- Only 4% of homes were constructed since 1990.
- As a result, there are selected areas in Prairie Village in need of rehabilitation in the east-central areas. Instead, these homes are often bought for demolition. This trend needs to stop to maintain relatively attainable housing options in Prairie Village.

MAP4.42: AGE OF HOUSING STOCK, PRAIRIE VILLAGE



Source: Johnson County GIS Department, Assessor Data

MAP 4.43: HOUSEHOLD INCOME OF TOP EARNING AGE GROUP, PRAIRIE VILLAGE



Source: American Community Survey (2018 5-year Estimates)

HOUSEHOLD INCOME

Map 4.43 provides an overview of Prairie Village's estimated household incomes:

- Median household income is $88,365, the 7th largest in the county. Median income rose by 11% since 2010.
- Geographically, higher incomes center around the core and southern portion of the city. The top earning age group varies, with younger and older workers earning high incomes.

"Flippers are tearing down houses in Prairie Village and rebuilding more expensive houses, apartment rents are crazy high with monthly rents higher than a house payment, but not house payments in JoCo... I understand these amenities drive prices up, but I'm not sure how long I stay here with my income not rising as fast as housing costs."

- Survey Respondent

HOME SALES

How quickly homes sell in a market is a leading indicator of housing demand and supply. **Figure 4.53** shows home sales data from 2017-2019. In Prairie Village, similar to other areas in the county:

- Average days on market have remained low while average sales price increases by more than inflation.
- The number of units sold is increasing, unlike other communities seeing a lack of available housing stock on the market.

"I would like to stay in Prairie Village and sell my larger 4bd / 4.5ba to a young family but it seems all the smaller ranch style houses are being snatched up by builders... I want to live in a community like Prairie Village or Lenexa City Center where I can easily walk to shops, restaurants, grocery and library."

- Survey Respondent

FIGURE 4.53: SINGLE FAMILY HOME SALES, PRAIRIE VILLAGE

Source: Multiple Listings Service (2017-2019)

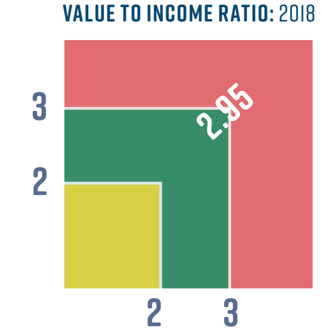
HOUSING ATTAINABILITY AND SUPPLY ANALYSIS

By comparing the distribution of household incomes with housing costs, a picture of supply and demand emerges across all of Prairie Village's housing market. **Figure 4.54** examines supply and demand through the lens of what is "affordable" to different income groups to answer the question: is there an adequate supply of housing options available for residents of different income groups?

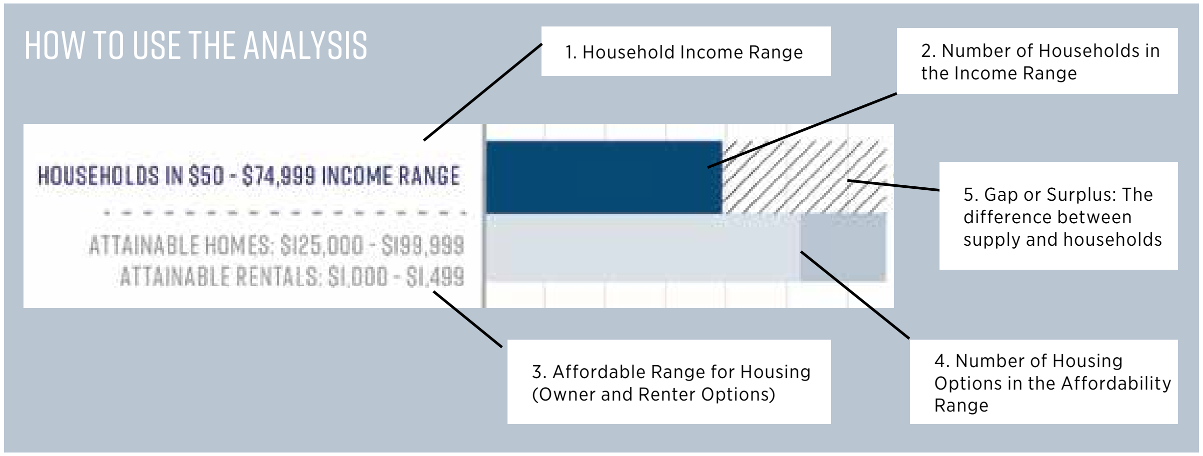
Figure 4.54 illustrates five major components in pursuit of the above story:

1. **Income Ranges.** The starting point of the analysis is the spectrum of incomes across all residents of Prairie Village. From these incomes, corresponding "affordable" housing prices are established for ownership and rental opportunities.
2. **Number of Households in Each Income Range.** The number of households in each income range is the demand; these residents seek housing options in Prairie Village that are affordable to them.
3. **Affordability Ranges.** An affordable ownership home is calculated at 2-3 times the household income depending on the income range. Lower income households tend to spend a higher percentage of their income on housing and higher income households tend to spend a lower percentage of their total income on housing. An affordable rental would be about 20% of household income.
4. **Number of Housing Units in Each Affordability Range.** The number of housing units in each affordability range is the supply of affordable options.
   - Composition of Housing Supply. This illustrates the share of the supply met by ownership and renter housing options.
5. **The Balance of Supply and Demand.**
   - If the number of households exceeds the number of units available, those households must seek options in different affordability ranges.
   - If the number of units exceeds the number of households, it indicates that the units are occupied by households in different income ranges.
   - **This analysis is meant to illustrate larger trends in how existing units are being occupied. It does not demonstrate exact market demand in certain price ranges.**

VALUE TO INCOME BENCHMARK

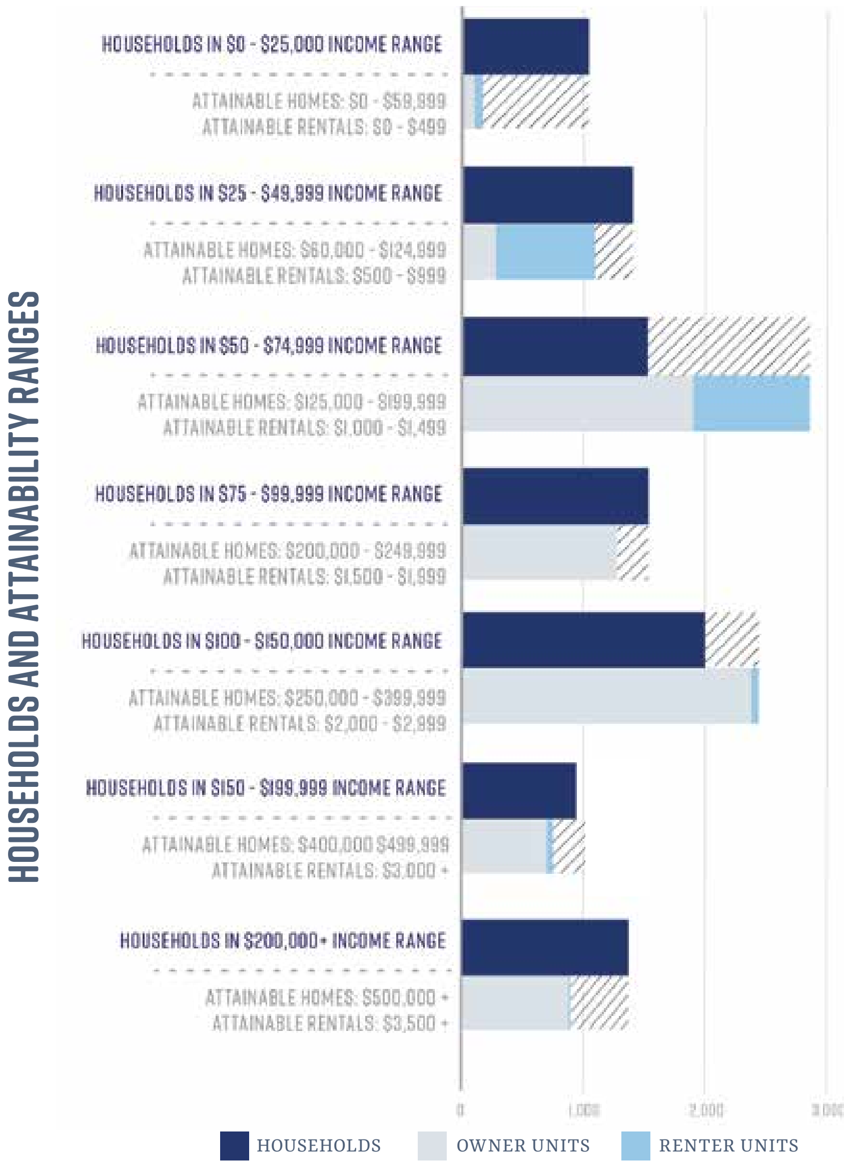


A healthy, self-sustaining housing market will have a value to income ratio between 2 and 3. Prairie Village's value to income ratio is 2.95, up from 2.60 in 2010.



The analysis in **Figure 4.54** is based on all the households today that are occupying a unit. No household is without a unit.

FIGURE 4.54: HOUSING ATTAINABILITY,PRAIRIE VILLAGE (2018)



Source: American Community Survey (2018 5-year Estimates); RDG Planning & Design

Many households making more than $150,000 are living in units priced below $400,000. This is good for them to have more discretionary spending, but may be a reason for recent demo/rebuild trends.

- Many of these households are older or retired and often occupy homes well above their incomes when owned outright. For example:
  - 35% of all owner-occupied households in Prairie Village are over the age of 65.
  - The median household income for households over 65 is estimated around $57,000, meaning that 50% of those households make less than $57,000.
  - Additionally, 63% of owner-occupied households over the age of 65 do not have a mortgage.

- Fewer households than attainable options. These units are also filled by lower and higher income households. These units should be maintained as attainable options for many households in the future.

- Slightly more households than attainable options in this range. However, there are very few rental units. Renters in this income range compete with lower income ranges for rental options.

- There are fewer households than affordable options. Many units in this range see competition from upper income brackets.

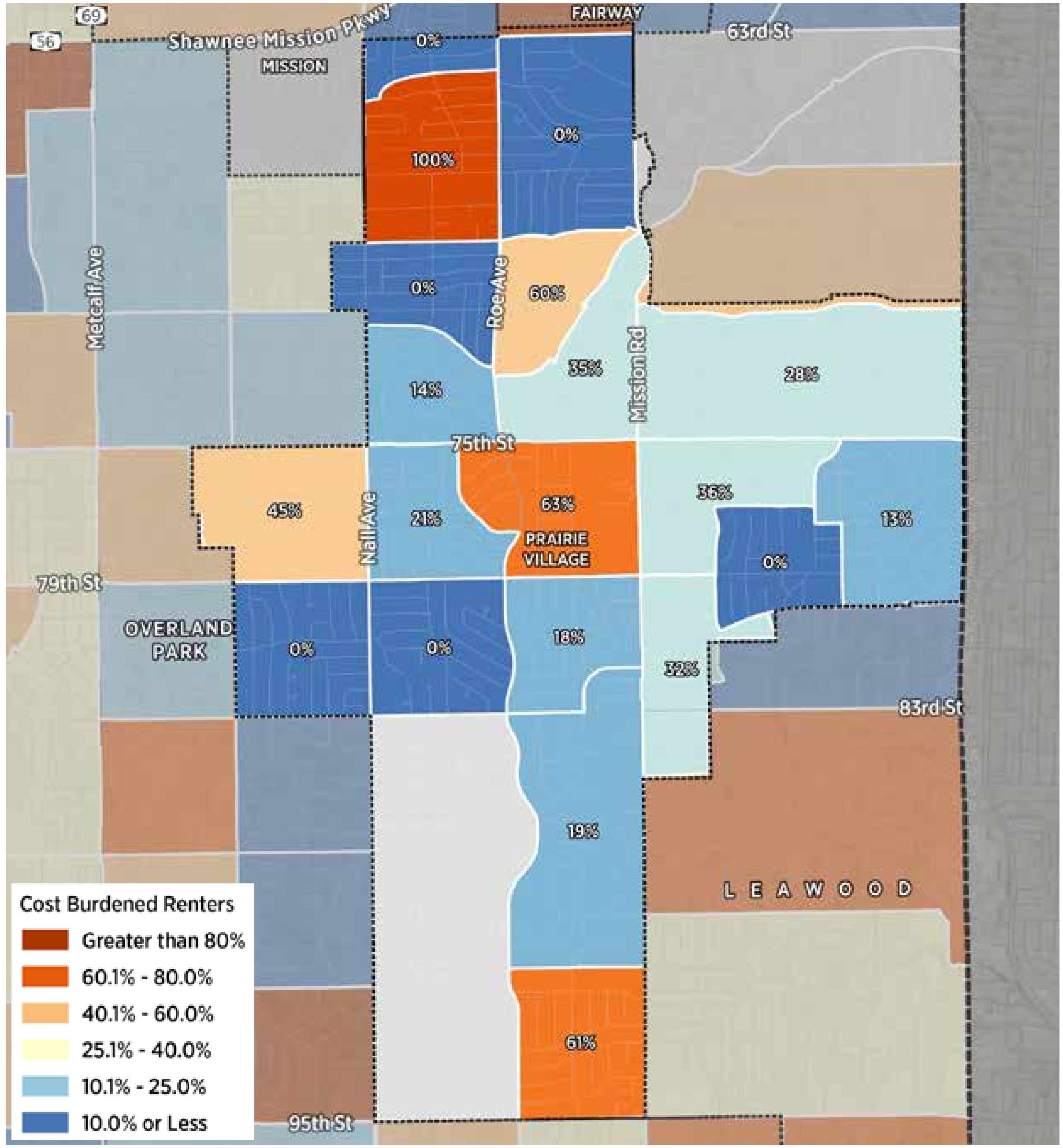
- Many households making more than $150,000 are living in units priced below $400,000. This is good for them to have more discretionary spending, but may be a reason for recent demo/rebuild trends because these households want to stay living in the community with a home that better meets their desires.
  - About 1,000 households making over $100,000 a year are living in owner-occupied units priced below $250,000.

COST BURDENED RESIDENTS

Maps 4.44 and **4.45** illustrates the level of cost-burdened households. According to the U.S. Government, households spending more than 30% of their income on housing are considered cost-burdened.

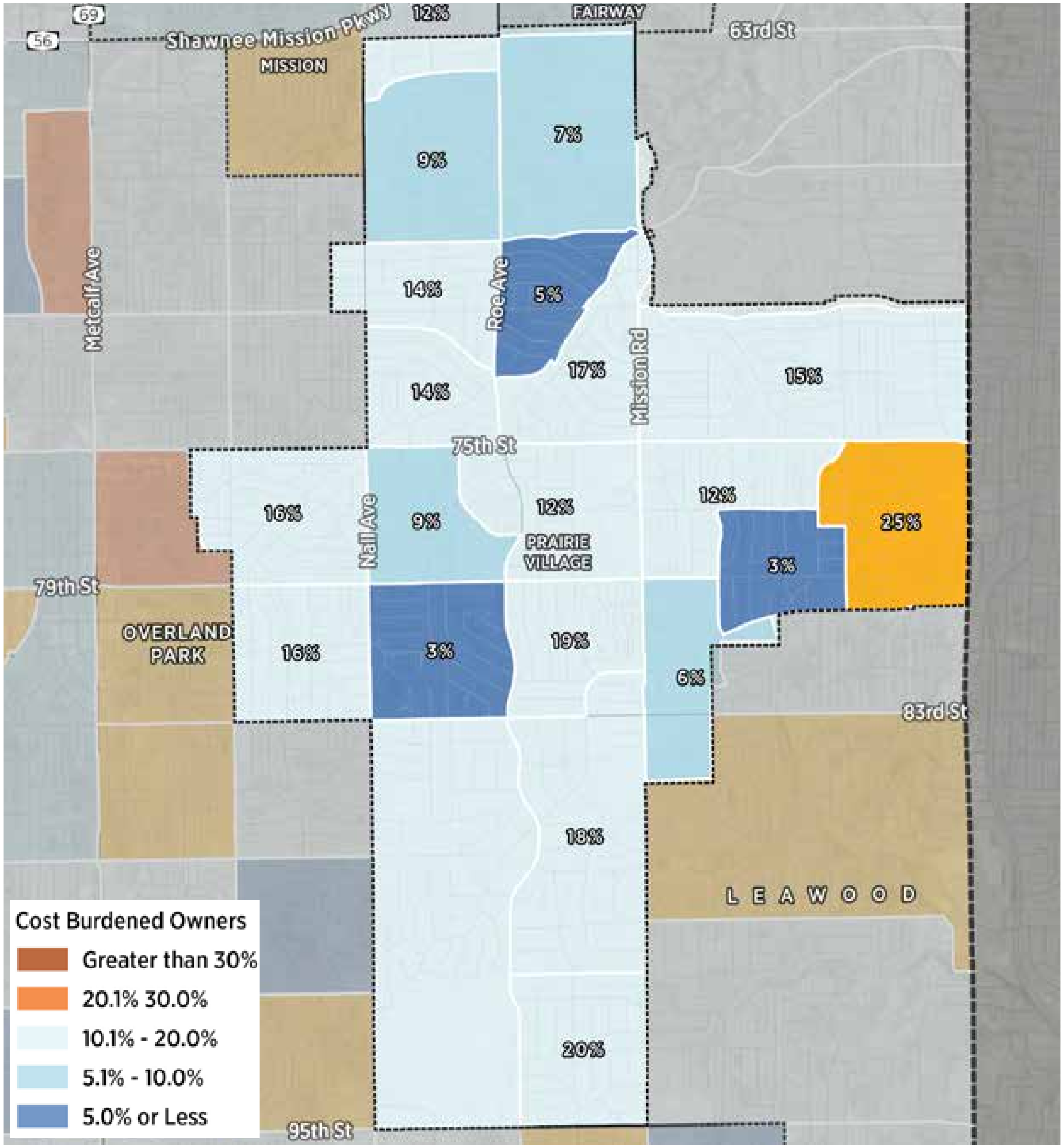
- Median contract rents are the 5th highest in the region at $1,116.
- Approximately 38% of Prairie Village's households living in renter housing spend more than 30% of their income on gross rent.
- Low rental supply, and thus a competitive market, often results in higher rental prices along with the desirability and location of Prairie Village.

MAP 4.44: PERCENT OF RENTER-OCCUPIED COST BURDENED HOUSEHOLDS, PRAIRIE VILLAGE



Source: American Community Survey (2018 5-year Estimates)

MAP 4.45: PERCENT OF OWNER-OCCUPIED COST BURDENED HOUSEHOLDS, PRAIRIE VILLAGE



Source: American Community Survey (2018 5-year Estimates)

- Median home values are about average in the county at $261,500 because of the older homes in the north and west portions of Prairie Village. However, home values are up 26% since 2010, the greatest increase of communities in Johnson County.
- Currently, only 19% of households living in owner-occupied housing spend more than 30% of their income on housing.

"Prairie Village is a land locked older suburban community that remains desirable. Unfortunately, housing costs tend to be high for what you get and the recent wave of tearing down small homes and replacing them with much larger homes is adding to housing costs."

- Survey Respondent

HOUSING DEMAND

The housing demand analysis builds on the population projections, housing trends, and community conversations to forecast the demand for additional housing. The model is built on the following assumptions with a 0.19% growth rate:

- The proportion of the household population (those living in households and not in skilled nursing or prisons) will remain stable through 2030.
- Average people per household will hold constant over the next decade. Some growth may occur as Millennials move into their childbearing years, but Baby Boomer households will also continue to shrink.
- Unit demand at the end of the period is calculated by dividing household population by the number of people per household. This equals the number of occupied housing units.
- A manageable housing vacancy provides housing choice for residents moving to the community. The rate remains constant at a healthy rate.
- Unit needs at the end of each period are based on the actual household demand plus the number of projected vacant units.

FIGURE 4.55: HOUSING DEMAND MODEL, PRAIRIE VILLAGE

	2020	2025	2030	TOTAL
POPULATION AT END OF PERIOD	22,142	22,379	22,619	
HOUSEHOLD POPULATION AT END OF PERIOD	21,974	22,209	22,447	
AVERAGE PEOPLE PER HOUSEHOLD	2.25	2.25	2.25	
HOUSEHOLD DEMAND AT END OF PERIOD	9,766	9,871	9,976	
PROJECTED VACANCY RATE	6.0%	6.0%	6.0%	
UNIT NEEDS AT END OF PERIOD	10,390	10,501	10,613	
REPLACEMENT NEED (TOTAL LOST UNITS)		130	80	210
CUMULATIVE NEED DURING PERIOD		241	192	434
AVERAGE ANNUAL CONSTRUCTION		48	38	43

Source: RDG Planning & Design

- Replacement need is the number of housing units demolished or converted to other uses. Prairie Village is unique in that historical demolition rates are not from poor housing conditions but a desire by investors to build larger homes. This trend needs to be curbed to maintain attainable options and character of neighborhoods. The future implementation of design standards for rebuilds may decrease some of this activity. Thus, the number of units lost decreases over time.
- Cumulative need shows the number of total units needed between the base year of 2020 and the year indicated at the end of the period.

Figure 4.55 shows an average annual construction need of 434 units, with 224 units being net new units likely in the form of denser mixed-use redevelopment in commercial corridors.

The average gross annual construction rate from 2010 to 2019 was 66 units, with a high of 312 in 2016 and a low of 3 in 2012. The net annual construction rate was 36 units when subtracting units demolished.

DEVELOPMENT PROGRAM

Building on the housing demand model, the development program forecasts production targets for owner and renter-occupied units based on the following assumptions:

- Owner-occupied units will be distributed roughly in proportion to the income distributions of the households for whom owner occupancy is an appropriate strategy.
- Most low-income residents will be accommodated in rental units.
- The city's supply is currently dominated by owner units. Over the next ten years, net growth will be in the form of mixed-use redevelopment with more rental units and perhaps some owner condos. Therefore, the model illustrated in **Figure 4.56** targets a split of 65% owner- and 35% renter-occupied units through 2030.
    - › Approximately 144 owner-occupied units should be priced below $250,000. This demand will come through the city's existing housing stock being freed up through move-up housing or products that do not fit the traditional detached single-family homes.
    - › About 67 rental units will need to be produced with rents below $1,000 per month. These units will have to be generated through programs like low-income housing tax credits or other subsidized means.

FIGURE 4.56: HOUSING DEVELOPMENT PROGRAM, PRAIRIE VILLAGE

	2025		2030		2020-2030	
TOTAL OWNER OCCUPIED						
ATTAINABLE: <$200,000	52	157	42	125	94	282
MODERATE MARKET: $200-250,000	28		22		50	
MARKET: $250-350,000	36		29		65	
HIGH MARKET: OVER $350,000	41		32		73	
TOTAL RENTER OCCUPIED						
ATTAINABLE: LESS THAN $1,000	37	84	30	67	67	152
MARKET: $1,000-1,500	23		19		42	
HIGH MARKET: $1,500+	24		19		42	
TOTAL NEED		241		192		434

Source: RDG Planning & Design

"Johnson County (especially Prairie Village) is lacking in diversity. I think more housing options & housing assistance could definitely help."

- Survey Respondent

COMMUNITY PERCEPTIONS

SURVEY

A total of 365 residents of Prairie Village took the community survey made available online and in paper form. From their responses the following themes emerged:

- Housing types perceived to be successful are those already present–mid-size, 3 bedroom homes and small 2-3 bedroom homes. 67% of respondents also felt independent senior living would be successful.
- Respondents felt the housing supply in Prairie Village did not meet the needs of all household types compared to Johnson County.
  - The housing supply for multi-generational families, seniors, single or coupled, people with physical and/or mental disabilities, students, low wage workers, and households needing access to transit all ranked low.
- When asked about solutions they would support to reduce housing costs in Johnson County, the highest ranking suggestions were unlike that of other large tier communities. The top rank, still with only 45% support, was housing rehabilitation loans, followed closely by duplex and townhome construction.
- The majority of respondents did not look to move within the past three years. Of those that did, 32% were looking for an owner-occupied unit and 6% a rental unit.
  - For those looking for owner units, a shortage was perceived for units under $200,000.

FIGURE 4.58: DECISION TO MOVE IN PAST 3 YEARS

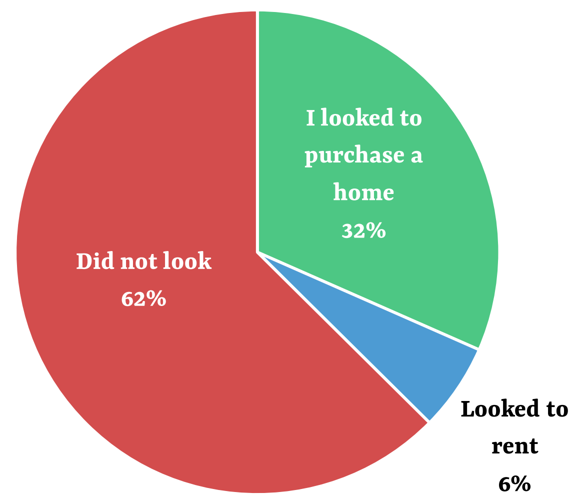
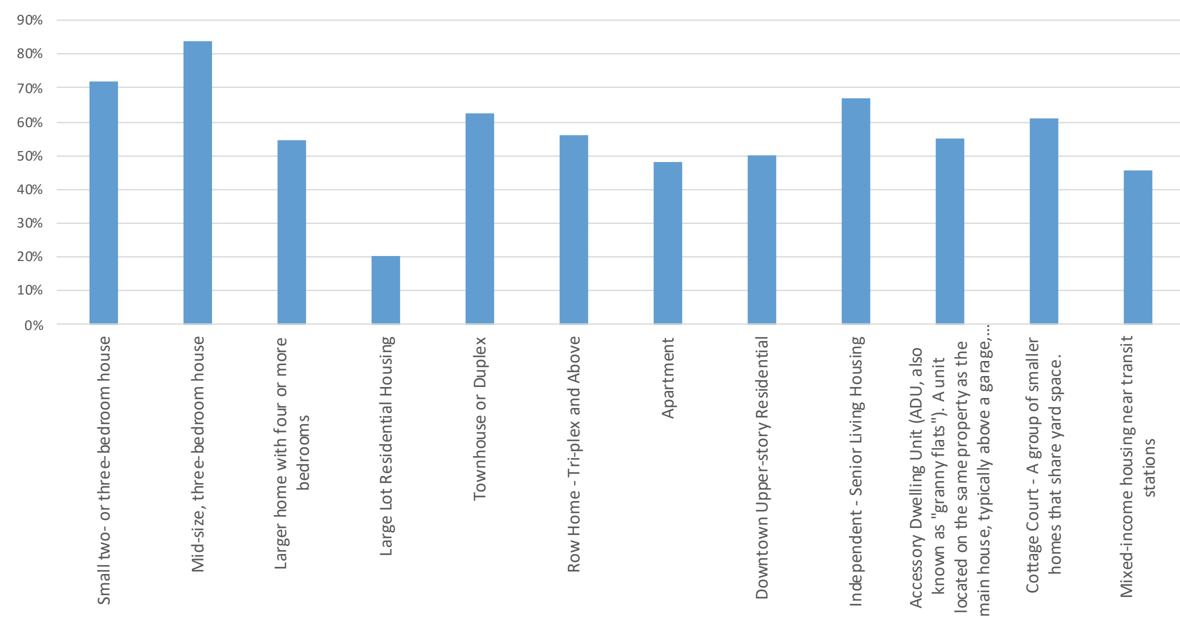


FIGURE 4.57: HOUSING TYPES PERCEIVED TO BE SUCCESSFUL IN THE CITY



LISTENING SESSIONS

Many people familiar with the housing market specific to Prairie Village participated in small group discussions. These included representatives from the City Council, Planning Commission, and real estate agents among others.

COMMON COMMENTS

Aside from common themes in Chapter 2 that pertain to the entire county, several common themes are apparent to Prairie Village.

- The trend of redeveloping existing ranch homes to larger homes are perhaps most prevalent in Prairie Village. This is a challenge for character and maintaining an attainable housing stock.
- Demand and interest in Prairie Village is trending toward walkable developments with services.
- There is a perception that all of Prairie Village is high end homes and luxury. However, there are older areas in need of rehabilitation and maintenance, if not bought by developers first.
- Like Leawood, rising property valuations are pricing out older population on fixed incomes.
- People that live in Prairie Village prefer rehabilitation over demolition of homes.

FIGURE 4.59: HOUSING SUPPLY CURRENTLY MEETS THE NEEDS OF THE FOLLOWING HOUSEHOLD TYPES

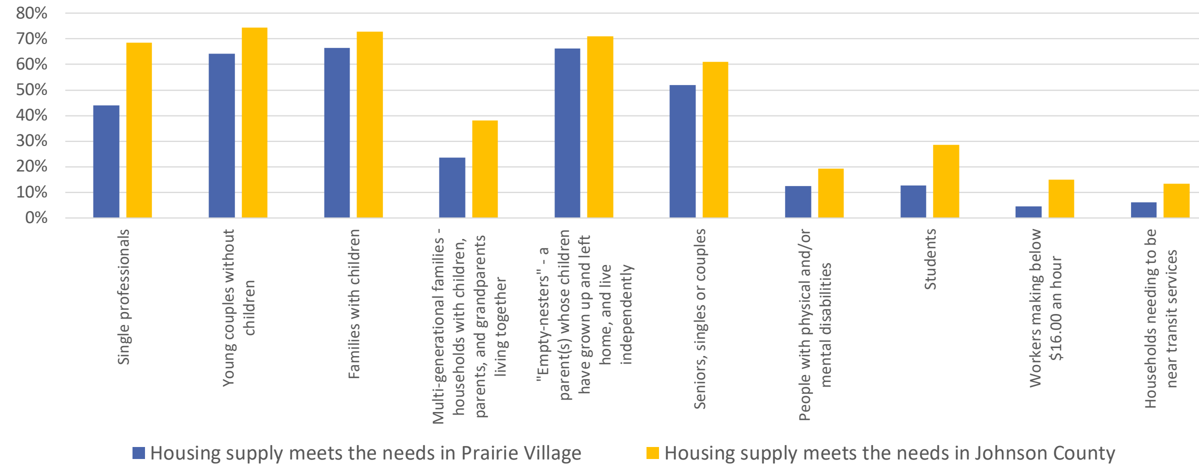
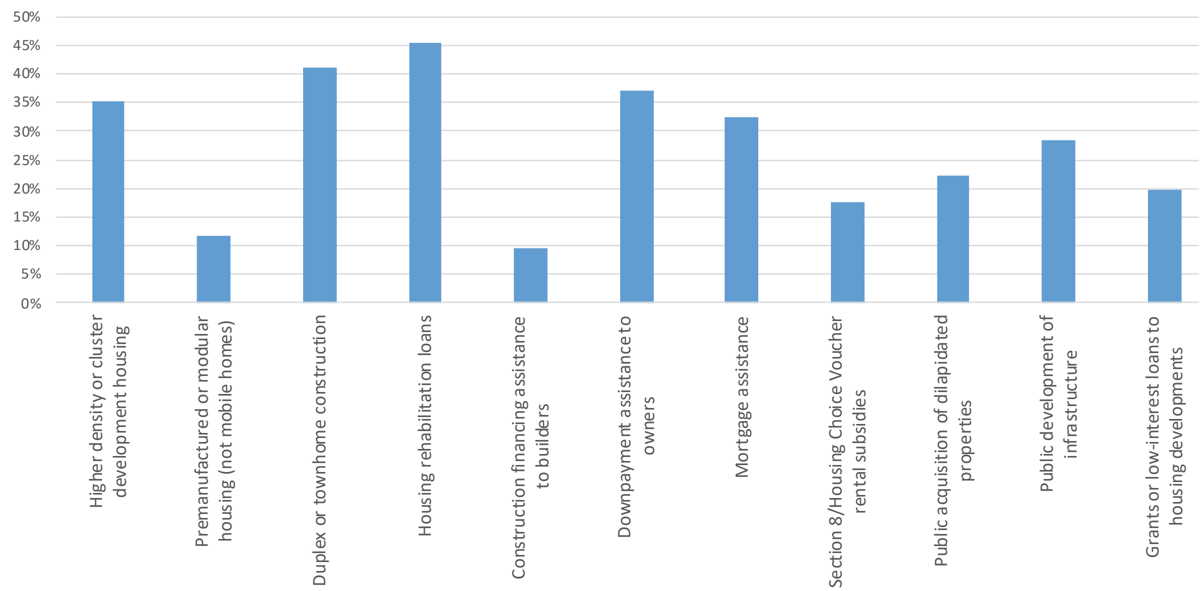


FIGURE 4.60: HOUSING SOLUTIONS SUPPORT TO REDUCE HOUSING COSTS IN JOHNSON COUNTY



GARDNER

Of the large tier communities in Johnson County, Gardner has the most potential for rapid new growth given the large areas of undeveloped land within and adjacent to the city. The location on I-35 and strong past growth indicate the community will continue to grow into 2030.

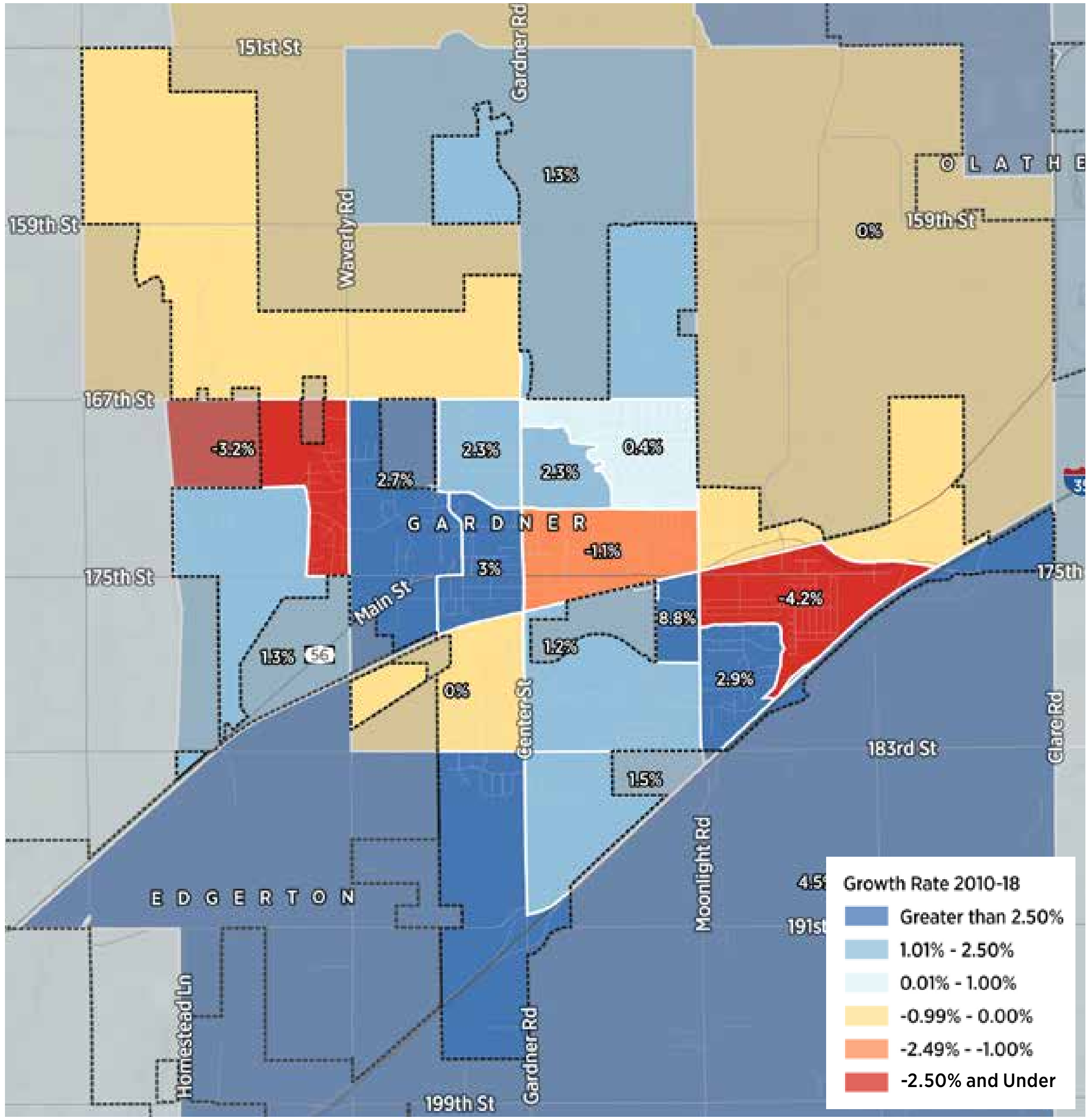
POPULATION CHANGE

Gardner experienced high growth rates between 1990 and 2010, tripling the population between 1990 and 2000 and doubling it between 2000 and 2010. Since 2010, this growth has continued at a slower rate. Between 2010 and 2018, the annual growth rate was about 1.40%. **Map 4.46** illustrates growth during this period by census block group. The only areas that experienced major population loss are two block groups, on the eastern boundary and the west highlighted in red.

GROWTH ANALYSIS

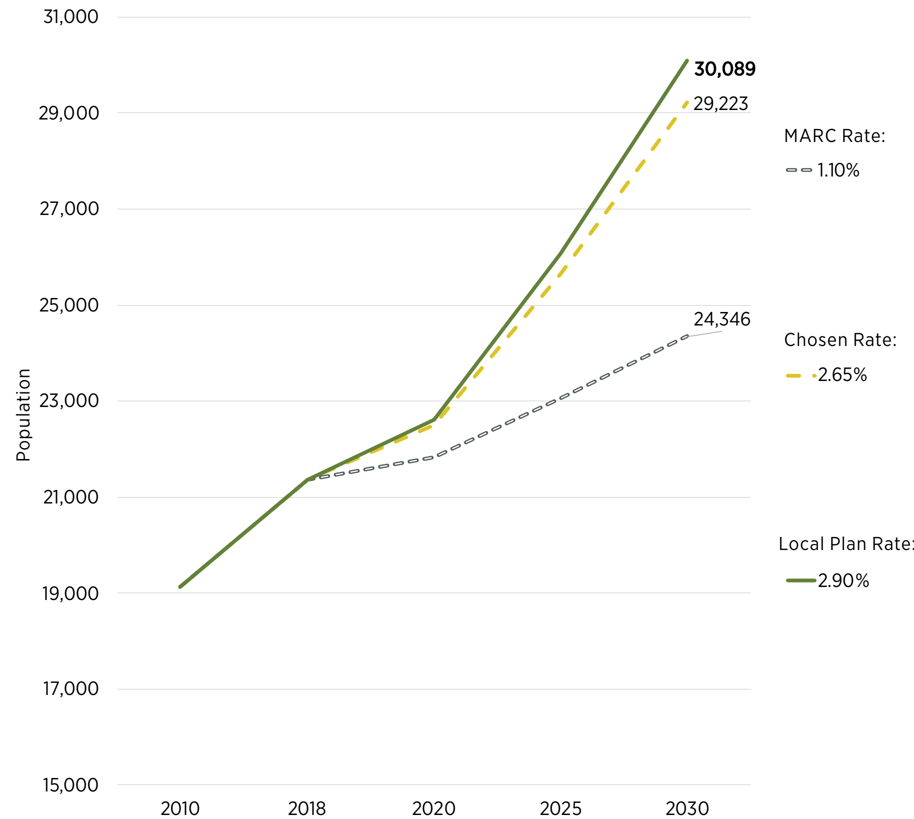
While Gardner has experienced rapid growth since 1990, declining annual growth rates in the recent decade is expected as a city gets larger. As a city that is near growing employment centers and along a major transportation route, growth in Gardner should remain strong and consistent in the future.

MAP 4.46: POPULATION GROWTH RATE 2010-2018 BY BLOCK GROUP, GARDNER



Source: American Community Survey (2018 5-year Estimates)

FIGURE 4.61: POPULATION GROWTH SCENARIOS, GARDNER



Source: U.S. Census; MARC; RDG Planning & Design

TEN-YEAR POPULATION FORECAST

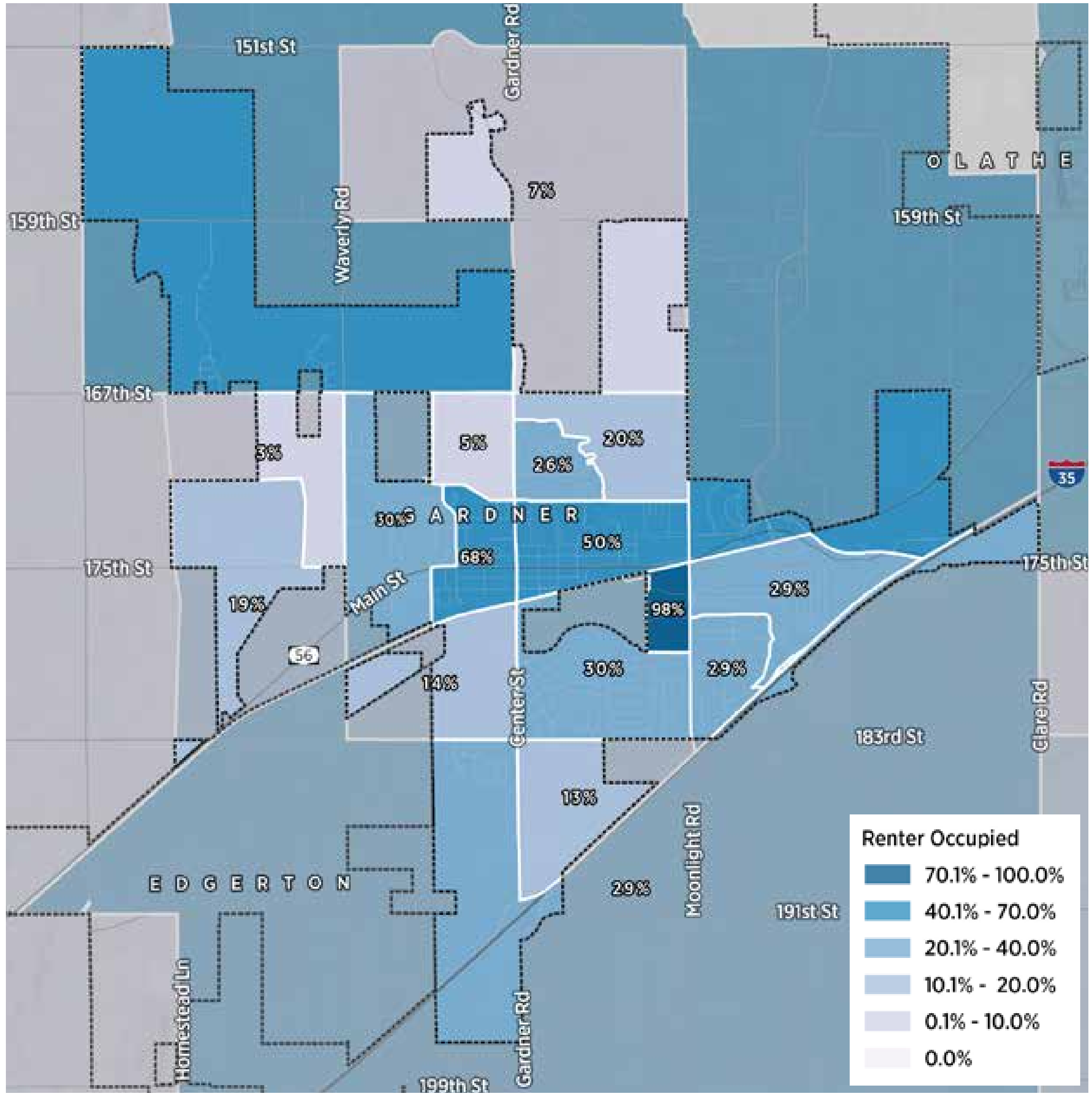
Figure 4.61 shows population forecast scenarios through 2030. The rates of 1.10% and 2.90% are pulled from MARC and local housing study completed in 2018. Because the local housing study was completed recently, this study adjusts the rate slightly and uses a 2.65% growth rate to accommodate for any lasting impacts of the recession.

HOUSING OCCUPANCY

Map 4.47 shows the ratio of renters across Gardner.

- Across the city about 66% of housing units are owner-occupied. This is a decrease from about 72% in 2010.
- Vacancy rates dropped to about 7% from a high of 9% in 2010. The current rate is at a relatively healthy level providing options for movement in the market.
- Household size is around 2.97 people per household, which is higher than most cities in Johnson County.
- Renter occupancy tends to cluster around Center Street and Main Street with a primarily renter-occupied census block at Moonlight Road and Highway 56.

MAP 4.47: PERCENT RENTER OCCUPIED STRUCTURES, GARDNER



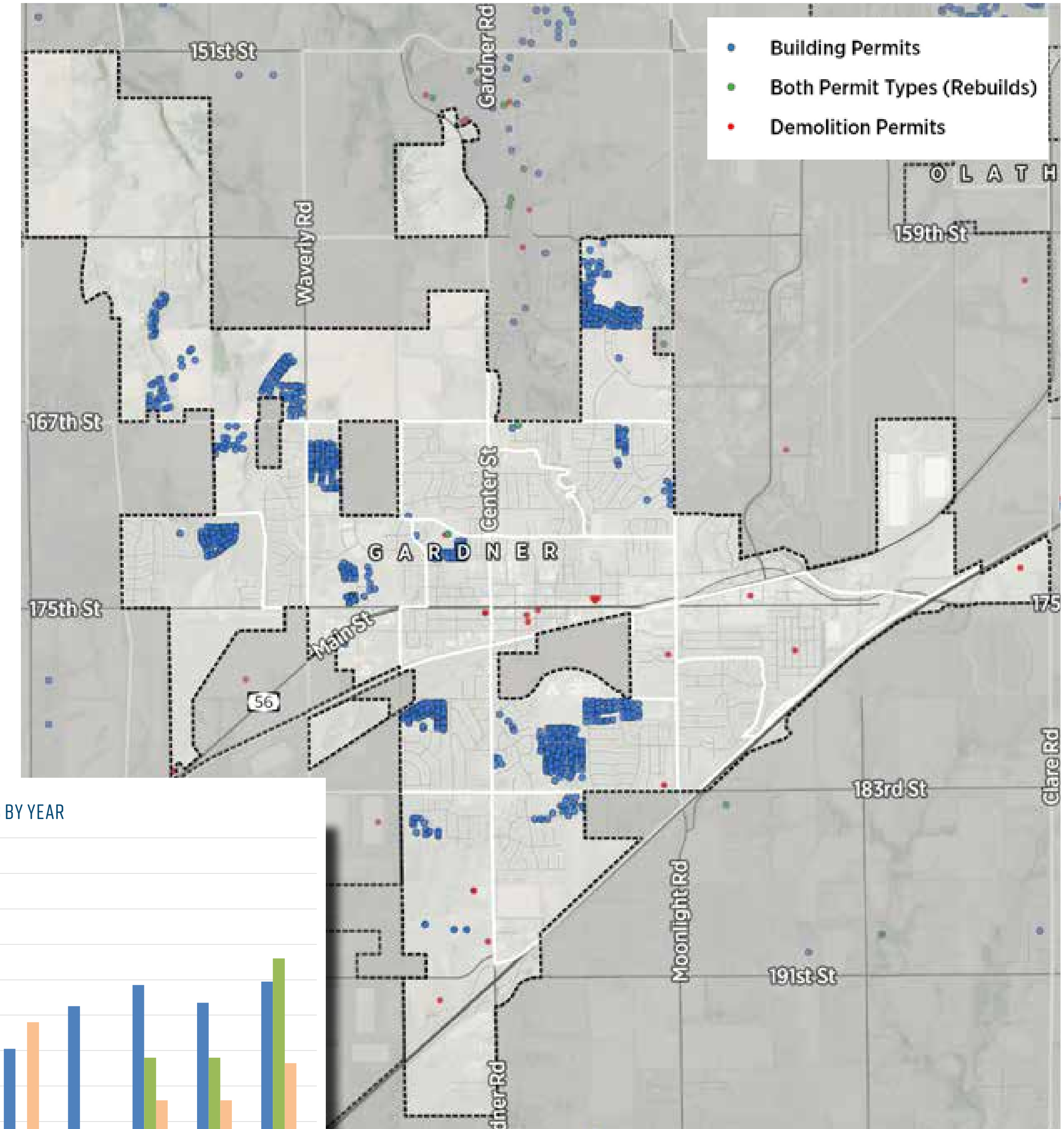
Source: American Community Survey (2018 5-year Estimates)

CONSTRUCTION ACTIVITY

Like many cities, residential construction activity continues to increase since the Great Recession. **Map 4.48** shows the location of permits pulled between 2010 and 2019:

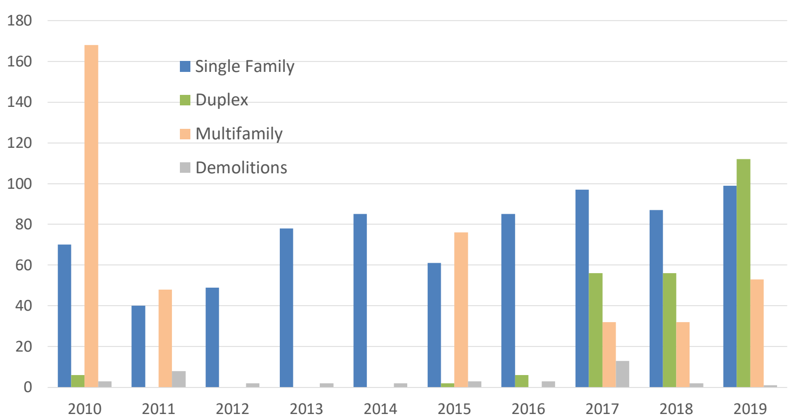
- About 59% of new units since 2010 were single-family dwellings and manufactured homes. In the last few years, single-family construction is between 85 and 100 units annually.
- Gardner has significant duplex construction compared to other cities at about 17% of all units since 2010. These can be owner and renter units.
- About 25% of new units were multi-family units which include apartments, townhomes, and any structure with more than two units. Most of these units are higher end market rate units.
- Demolitions were relatively non-existent. Outside of 2017 when 13 units were demolished, most years saw below three units lost.

MAP 4.48: RESIDENTIAL NEW CONSTRUCTION PERMITS BY LOCATION (2010-2019), GARDNER



Source: Johnson County GIS Department

FIGURE 4.62: RESIDENTIAL DEVELOPMENT PERMITS BY YEAR



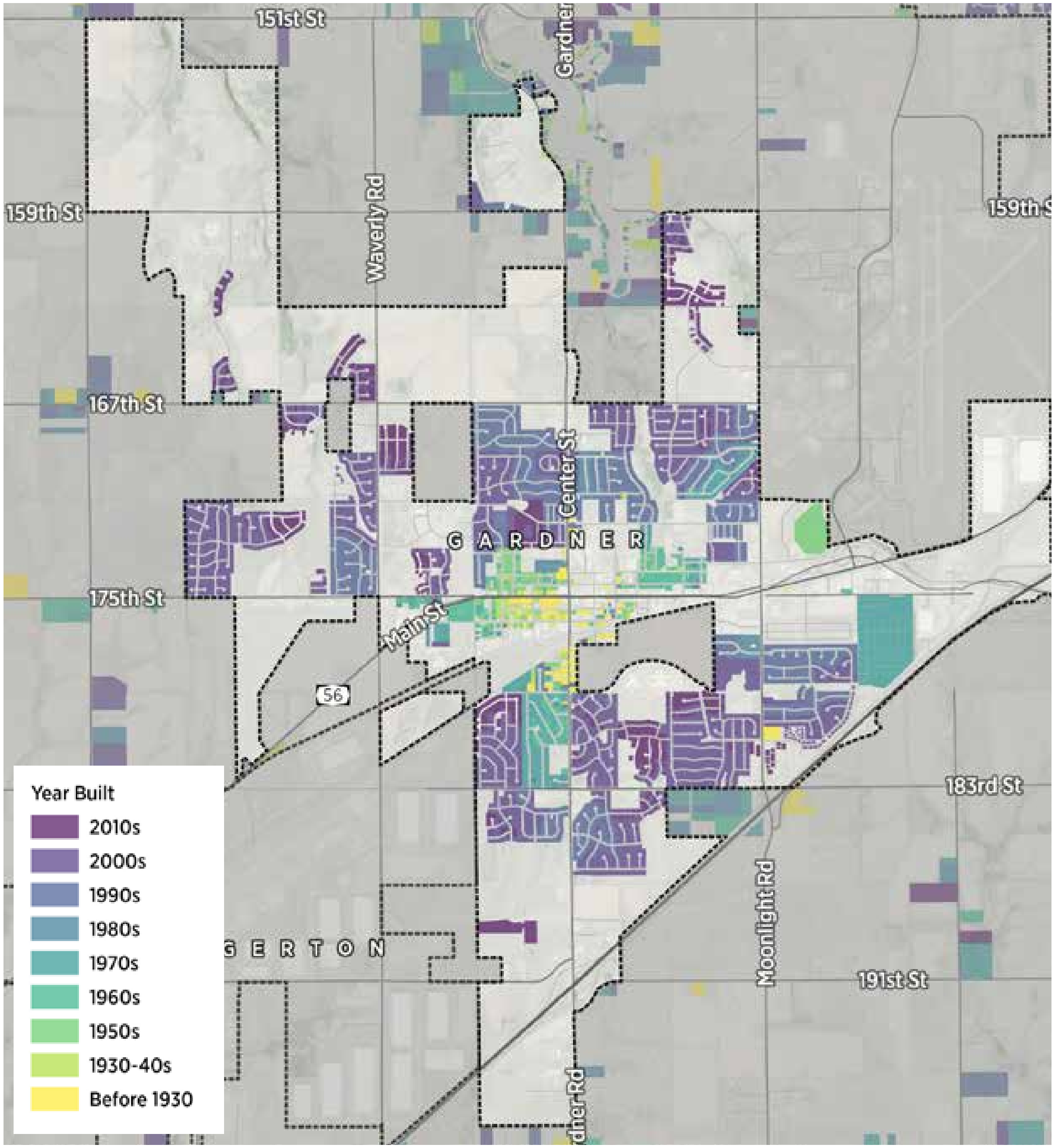
Source: City of Gardner

AGE OF HOUSING

Map 4.49 shows the year built of residential dwellings. The age of housing provides preliminary insight into areas more susceptible to deterioration and additional homeowner costs. If these areas are also occupied by lower income households then monitoring of rehabilitation needs is even more important.

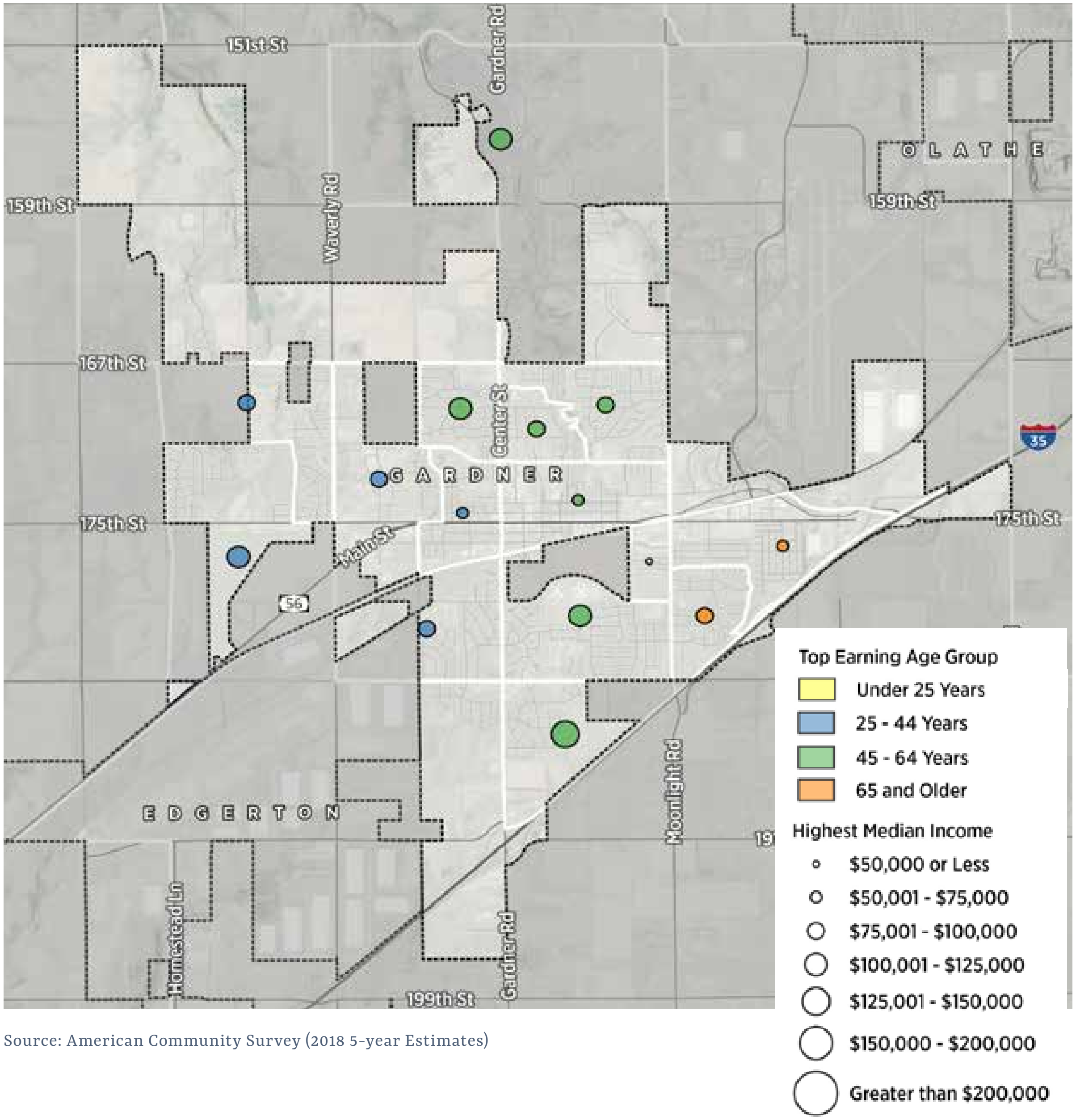
- Gardner has a reasonably modern housing stock. About 42% were built between 2000 and 2009.
- Only 22% of homes were built before 1980. The homes built before 1950 are located at Center and Main Streets. These are the homes typically in the most need of repairs and at risk of falling into dilapidation.

MAP 4.49: AGE OF HOUSING STOCK, GARDNER



Source: Johnson County GIS Department, Assessor Data

MAP 4.50: HOUSEHOLD INCOME OF TOP EARNING AGE GROUP, GARDNER



Source: American Community Survey (2018 5-year Estimates)

HOUSEHOLD INCOME

Map 4.50 provides an overview of Gardner's estimated household incomes:

- Median household income in Gardner is $75,985, which is on the lower end of incomes in the county but rising quickly, up 19% since 2010.
- Gardner has some of the youngest top earning neighborhoods in Johnson County, with residents under 25 years of age earning some of the highest incomes in Gardner.

"I would love a light rail or other convenient public transportation from Gardner/Edgerton into Lawrence or KCMO and I think that would also encourage more people to view our communities as desirable places to live.."

- Survey Respondent

HOME SALES

How quickly homes sell in a market is a leading indicator of housing demand and supply. **Figure 4.63** shows home sales data from 2017-2019. In Gardner, similar to other areas in the county:

- Homes sales price is rising by more than inflation, reflecting the rise in construction costs for new homes.
- The average days a home is on the market is at one of the lowest levels in the county.

FIGURE 4.63: SINGLE FAMILY HOME SALES, GARDNER

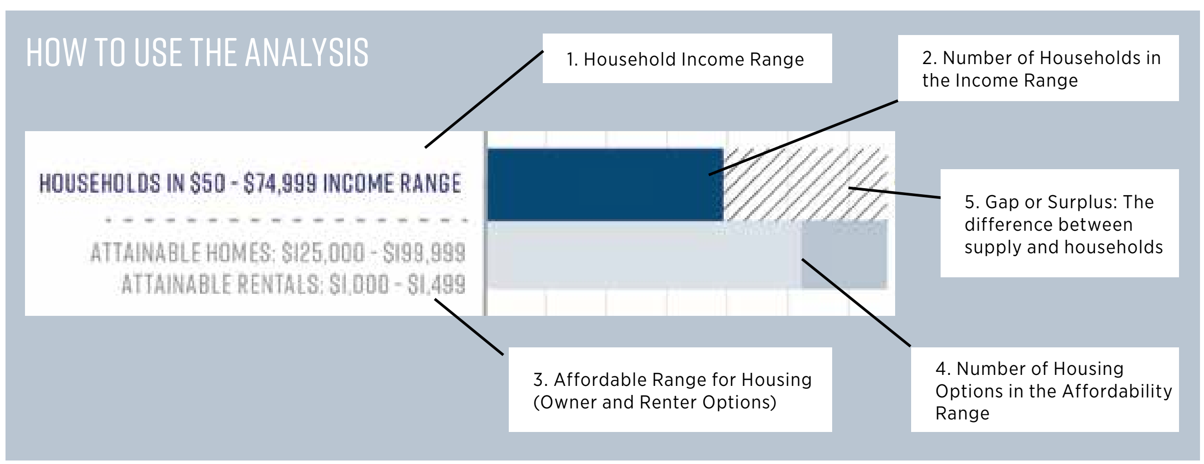
Source: Multiple Listings Service (2017-2019)

HOUSING ATTAINABILITY AND SUPPLY ANALYSIS

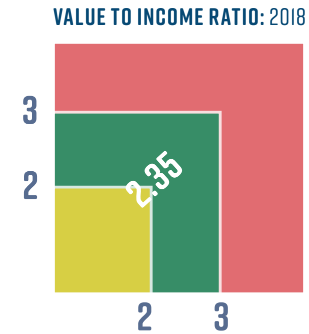
By comparing the distribution of household incomes with housing costs, a picture of supply and demand emerges across all of Gardner's housing market. **Figure 4.64** examines supply and demand through the lens of what is "affordable" to different income groups to answer the question: is there an adequate supply of housing options available for residents of different income groups?

Figure 4.64 illustrates five major components in pursuit of the above story:

1. **Income Ranges.** The starting point of the analysis is the spectrum of incomes across all residents of Gardner. From these incomes, corresponding "affordable" housing prices are established for ownership and rental opportunities.
2. **Number of Households in Each Income Range.** The number of households in each income range is the demand; these residents seek housing options in Gardner that are affordable to them.
3. **Affordability Ranges.** An affordable ownership home is calculated at 2-3 times the household income depending on the income range. Lower income households tend to spend a higher percentage of their income on housing and higher income households tend to spend a lower percentage of their total income on housing. An affordable rental would be about 20% of household income.
4. **Number of Housing Units in Each Affordability Range.** The number of housing units in each affordability range is the supply of affordable options.
   - Composition of Housing Supply. This illustrates the share of the supply met by ownership and renter housing options.
5. **The Balance of Supply and Demand.**
   - If the number of households exceeds the number of units available, those households must seek options in different affordability ranges.
   - If the number of units exceeds the number of households, it indicates that the units are occupied by households in different income ranges.
   - **This analysis is meant to illustrate larger trends in how existing units are being occupied. It does not demonstrate exact market demand in certain price ranges.**



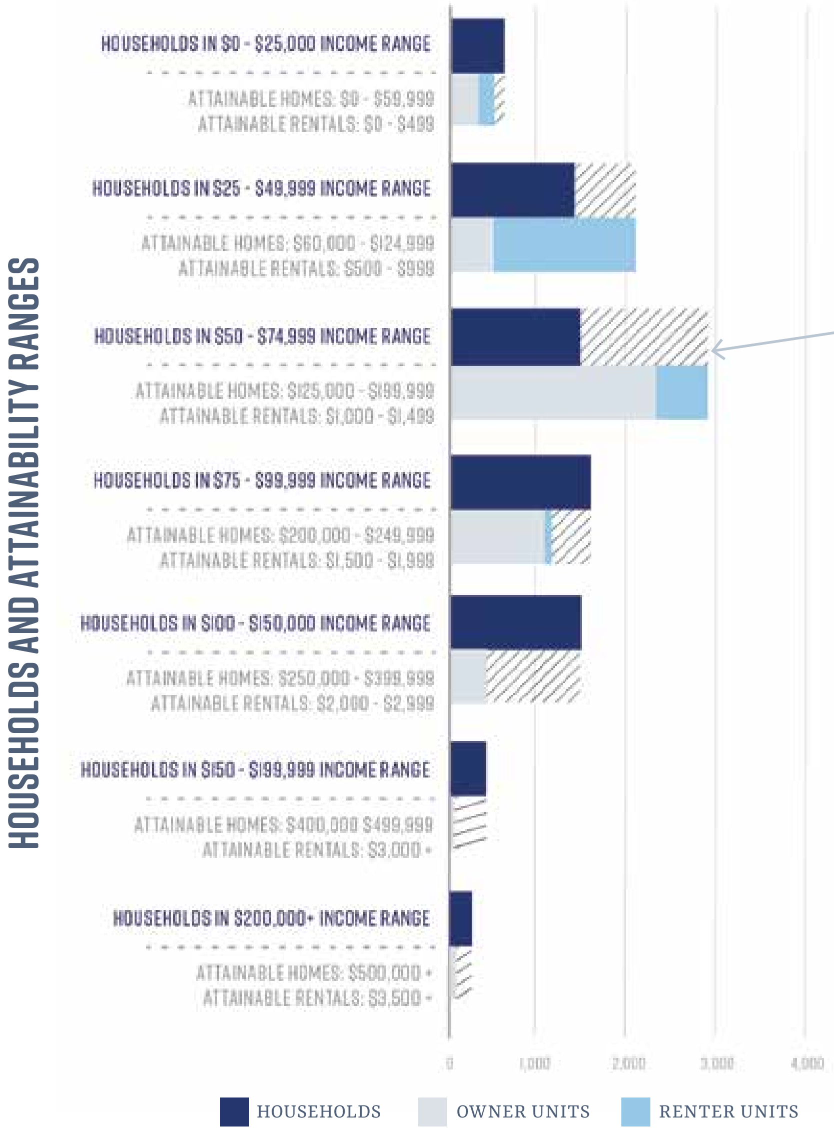
VALUE TO INCOME BENCHMARK



A healthy, self-sustaining housing market will have a value to income ratio between 2 and 3. Gardner has a value to income ratio of 2.35 which is a decrease from 2.51 in 2010. The decrease is indicative of higher income households moving to the city.

The analysis in **Figure 4.64** is based on all the households today that are occupying a unit. No household is without a unit.

FIGURE 4.64: HOUSING ATTAINABILITY, GARDNER (2018)



Source: American Community Survey (2018 5-year Estimates); RDG Planning & Design

Many households making over $75,000 are living in units priced below what they can actually afford. Building trends show a continued increase in units at and above the $200,000 price range.

- Household's making less than $25,000 includes seniors on fixed incomes who report low earnings but may have their homes paid off. However, this is not a significant percentage in Gardner as only about 9% of owner-occupied households are over the age of 65.

- Gardner has a supply of ownership options priced between $125,000 and $200,000. Without options at other price points these units are also filled by households making over $75,000 per year.

- The greatest shortage is for households making over $75,000. This illustrates the relatively lower cost of housing built in Gardner in the early 2000s and rising incomes in the city. Continued high levels of residential construction will continue to fill these gaps. Many households making over $75,000 are living in units priced below what they can actually afford. This is good for them to have more discretionary spending.
  - About 1,300 households making over $100,000 a year are living in owner-occupied units priced below $250,000.
  - They do this for a variety of reasons, including housing cost and neighborhood preferences in addition to a lack of other options above this price range.

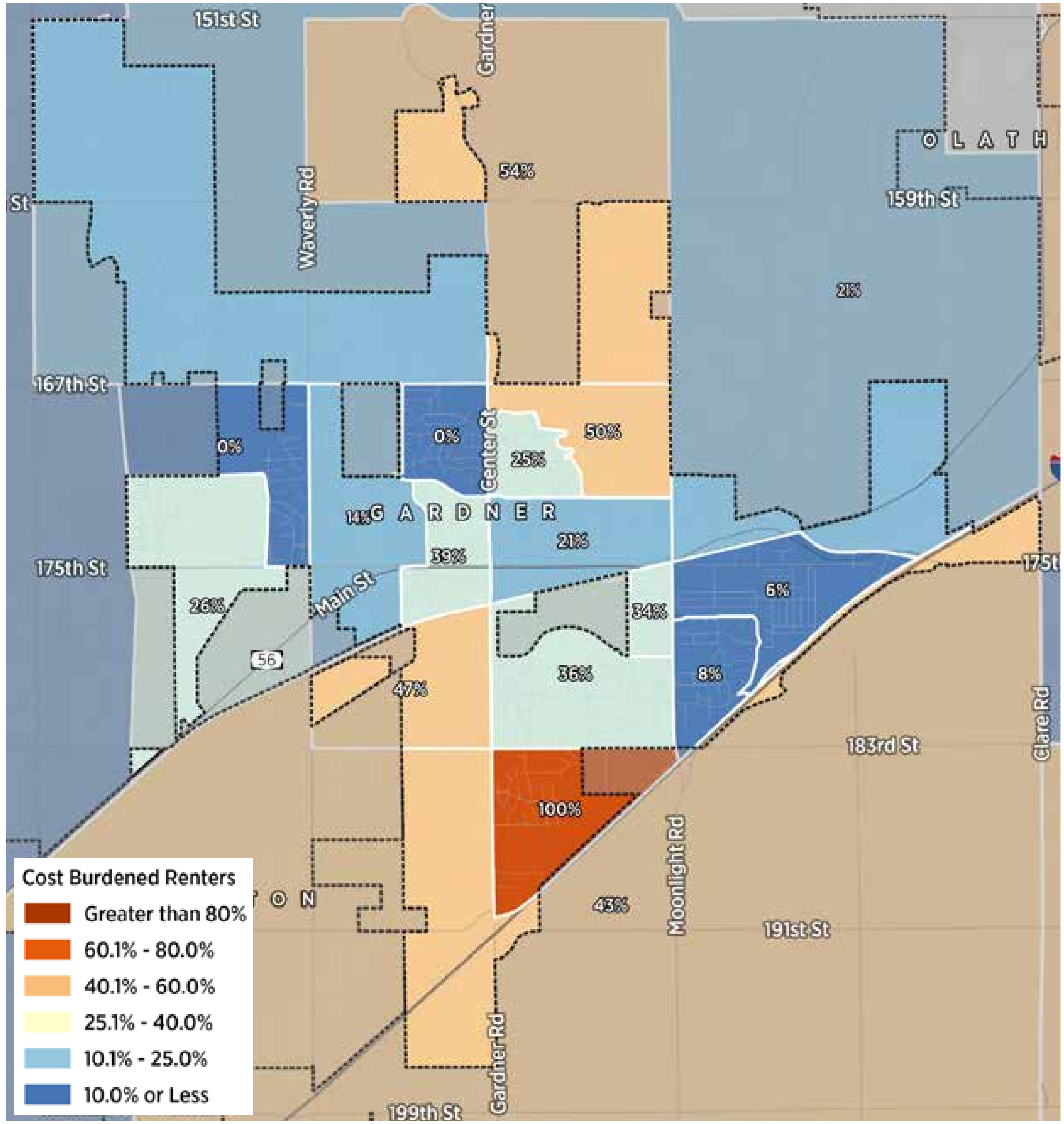
COST BURDENED RESIDENTS

Maps 4.51 and 4.52 illustrates the level of cost-burdened households. According to the U.S. Government, households spending more than 30% of their income on housing are considered cost-burdened.

- Median contract rents are fairly attainable compared to other cities in the county at $835. However, this rate is up from $688 in 2010.
- As a result, approximately 43% of Gardner's households living in renter housing spend more than 30% of their income on rent. These are likely hourly workers working in the community or at the inter-modal facilities.
- Lower rental supply, and thus a competitive market, can result in higher rental prices. Gardner has experienced substantial growth in the number of duplex units constructed in recent years which should help create market pressures on older units to adjust rates down.

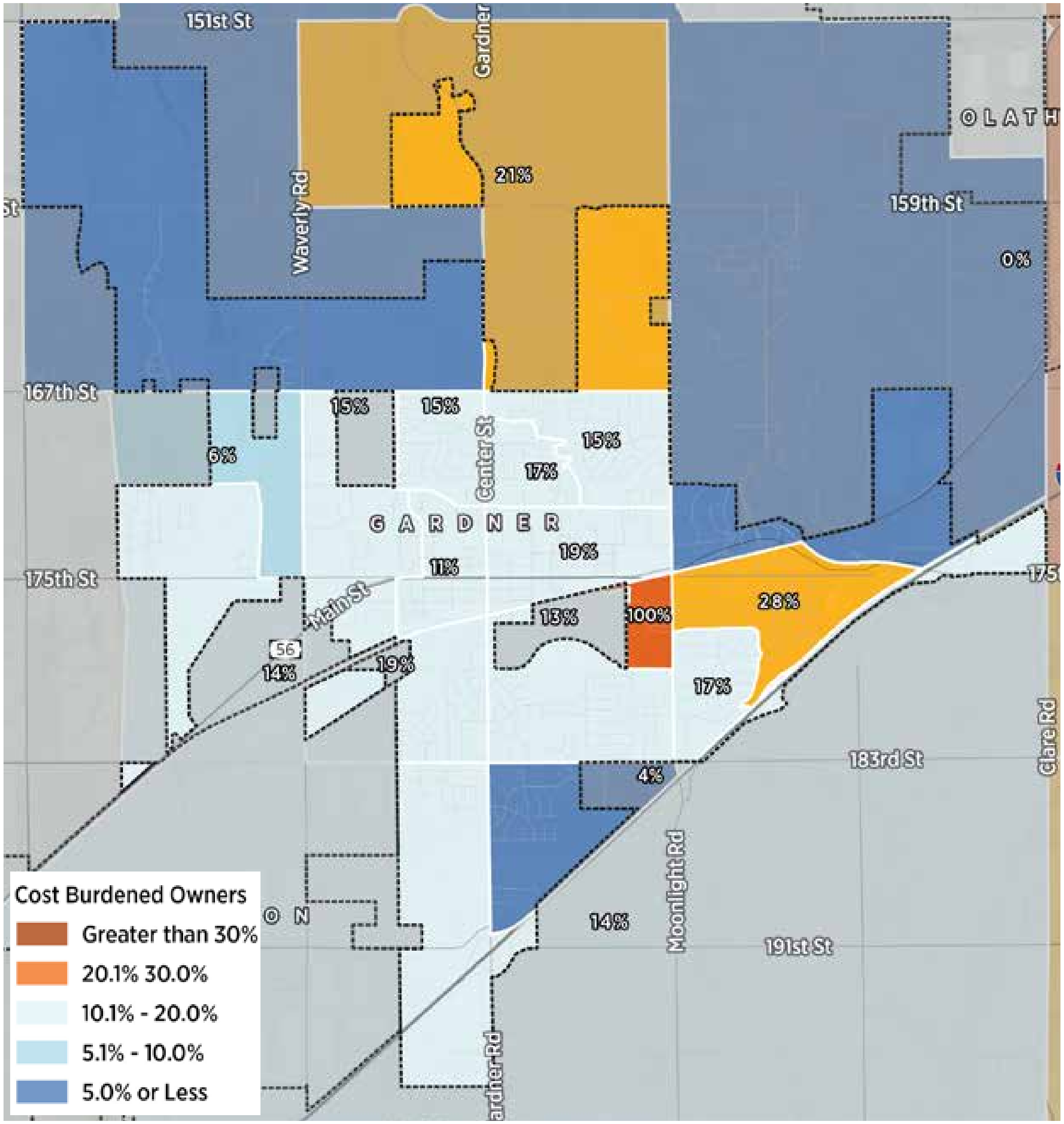
> I hear a lot of people say the rent is too high for Gardner
>
> **- Survey Respondent**

MAP 4.51: PERCENT OF RENTER-OCCUPIED COST BURDENED HOUSEHOLDS, GARDNER



Source: American Community Survey (2018 5-year Estimates)

MAP 4.52: PERCENT OF OWNER-OCCUPIED COST BURDENED HOUSEHOLDS, GARDNER



Source: American Community Survey (2018 5-year Estimates)

- Median home values are lower than average for Johnson County at $178,700. However, the median value is up 11.8% since 2010, an average increase compared to other cities.
- As a result, only 17% of households living in owner-occupied housing spend more than 30% of their income on housing.

HOUSING DEMAND

The housing demand analysis builds on the population projections, housing trends, and community conversations to forecast the demand for additional housing. The model is built on the following assumptions with a 2.65% annual growth rate:

- The proportion of the household population (those living in households and not in skilled nursing or prisons) will remain stable through 2030.
- Average people per household is expected to remain constant over the next decade. Gardner attracts family households, and this will continue into the future.
- Unit demand at the end of the period is calculated by dividing household population by the number of people per household. This equals the number of occupied housing units.
- A manageable housing vacancy provides housing choices for residents moving to the community. Gardner will have a stable vacancy rate.
- Unit needs at the end of each period are based on the actual household demand plus the number of projected vacant units.

FIGURE 4.65: HOUSING DEMAND MODEL, GARDNER

	2020	2025	2030	TOTAL
POPULATION AT END OF PERIOD	22,498	25,641	29,223	
HOUSEHOLD POPULATION AT END OF PERIOD	22,498	25,641	29,223	
AVERAGE PEOPLE PER HOUSEHOLD	2.90	2.90	2.90	
HOUSEHOLD DEMAND AT END OF PERIOD	7,758	8,842	10,077	
PROJECTED VACANCY RATE	7.0%	7.0%	7.0%	
UNIT NEEDS AT END OF PERIOD	8,342	9,507	10,835	
REPLACEMENT NEED (TOTAL LOST UNITS)		20	20	40
CUMULATIVE NEED DURING PERIOD		1,185	1,348	2,534
AVERAGE ANNUAL CONSTRUCTION		237	270	253

Source: RDG Planning & Design

- Replacement need is the number of housing units demolished or converted to other uses. Homes in poor condition or obsolete should be gradually replaced in a city's housing supply. The number of units lost annually is based on historic demolition rates.
- Cumulative need shows the number of total units needed between the base year of 2020 and the year indicated at the end of the period.

Figure 4.65 shows an average annual construction need of 253 units. The average annual construction rate from 2010 to 2019 was 140 units, with a high of 264 in 2019 and a low of 51 in 2012. Recent housing unit construction trends will continue with some years having more and others having fewer units than the average.

DEVELOPMENT PROGRAM

Building on the housing demand model, the development program forecasts production targets for owner and renter-occupied units based on the following assumptions:

- Owner-occupied units will be distributed roughly in proportion to the income distributions of the households for whom owner occupancy is an appropriate strategy.
- Most low-income residents will be accommodated in rental units.
- Over the last several years, the large majority of new units have been in owner configurations or very low density owner/renter options (duplex units). Over the next ten years, production levels need to balance to provide the housing variety necessary for a growing population. Therefore, the model illustrated in **Figure 4.66** targets a split of 60%-40% through 2030.
  - › Approximately 1,037 additional owner-occupied units should be priced below $250,000. This demand will come through the city's existing housing stock being freed up through move-up housing, or products that do not fit the traditional detached single-family homes.
  - › Nearly 406 rental units will need to be produced with rents below $1,000 per month. These units will have to be generated partially through programs like low-income housing tax credits.

FIGURE 4.66: HOUSING DEVELOPMENT PROGRAM, GARDNER

	2025		2030		2020-2030	
TOTAL OWNER OCCUPIED						
ATTAINABLE: <$200,000	312	711	355	809	666	1,520
MODERATE MARKET: $200-250,000	173		197		371	
MARKET: $250-350,000	159		181		340	
HIGH MARKET: OVER $350,000	67		76		143	
TOTAL RENTER OCCUPIED						
ATTAINABLE: LESS THAN $1,000	190	474	216	539	406	1,013
MARKET: $1,000-1,500	136		154		290	
HIGH MARKET: $1,500+	149		169		317	
TOTAL NEED		1,185		1,348		2,534

Source: RDG Planning & Design

"More ranch houses. In Gardner there are too many in splits with many stairs. If you buy to get old there you don't want to have so much ladder and levels of home"

- Survey Respondent

COMMUNITY PERCEPTIONS

SURVEY

A total of 116 residents of Gardner took the community survey made available online and in paper form. From their responses the following themes emerged:

- Housing types perceived to be successful are those already present–mid-size, 3 bedroom homes and small 2-3 bedroom homes. Additionally, 73% of respondents also felt independent senior living would be successful.
- Respondents felt the housing supply in Gardner did not meet the needs of single professionals, but Johnson County did a better job meeting this need.
  - The housing supply for multi-generational families, seniors, single or coupled, people with physical and/or mental disabilities, students, low wage workers, and households needing access to transit all ranked low.
- When asked about solutions they would support to reduce housing costs in Johnson County, the highest ranking suggestions were downpayment assistance to owners and mortgage assistance.
- Over half of respondents looked to move within the past three years, 41% to an owner-occupied unit and 17% to a rental.
  - For those looking for owner units, a shortage was perceived for units under $200,000.
  - For rental units, no evident shortage emerged.

FIGURE 4.68: DECISION TO MOVE IN PAST 3 YEARS

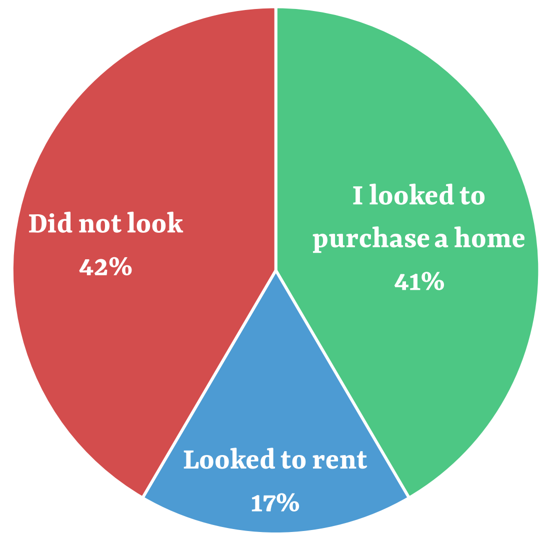
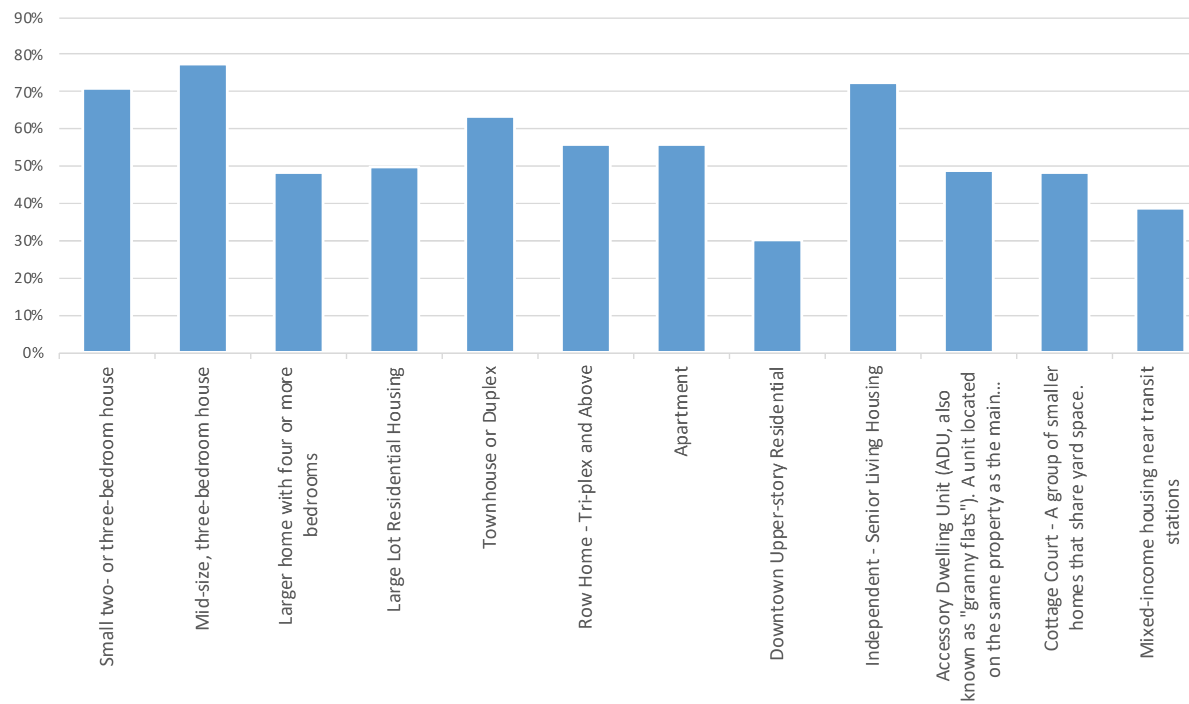


FIGURE 4.67: HOUSING TYPES PERCEIVED TO BE SUCCESSFUL IN THE CITY



LISTENING SESSIONS

Many people familiar with the housing market specific to Gardner participated in small group discussions. These included representatives from the City Council, Planning Commission, staff, and real estate agents, among others.

COMMON COMMENTS

Aside from common themes in Chapter 2 that pertain to the entire county, several common themes are apparent to Gardner.

- Gardner is a popular location right now for families wanting 3+ bedrooms. New homes are still relatively attainable for median income households.
- However, rental options are limited for hourly workers. No transit options further limits the ability for these workers to live in Gardner.
- Households with one income may still have difficulty finding attainable housing, especially if they have kids.
- Many see an opportunity for more senior options as Gardner continues to rapidly grow and long-time resident grow older with more needs.

FIGURE 4.69: HOUSING SUPPLY CURRENTLY MEETS THE NEEDS OF THE FOLLOWING HOUSEHOLD TYPES

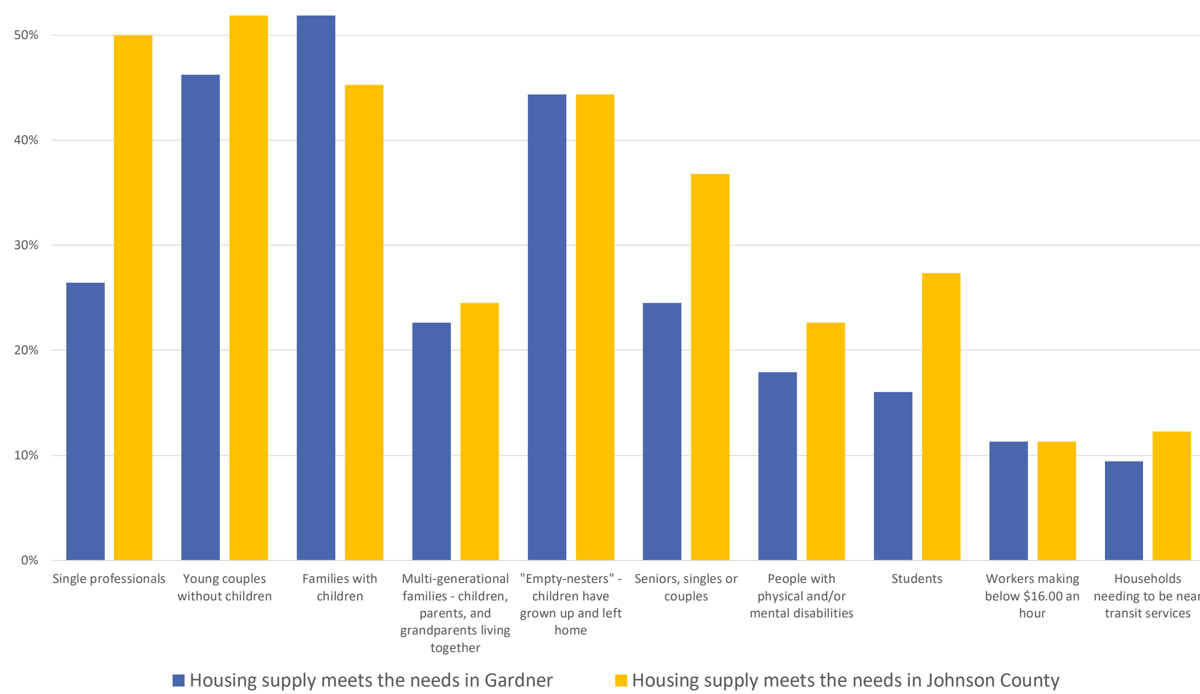
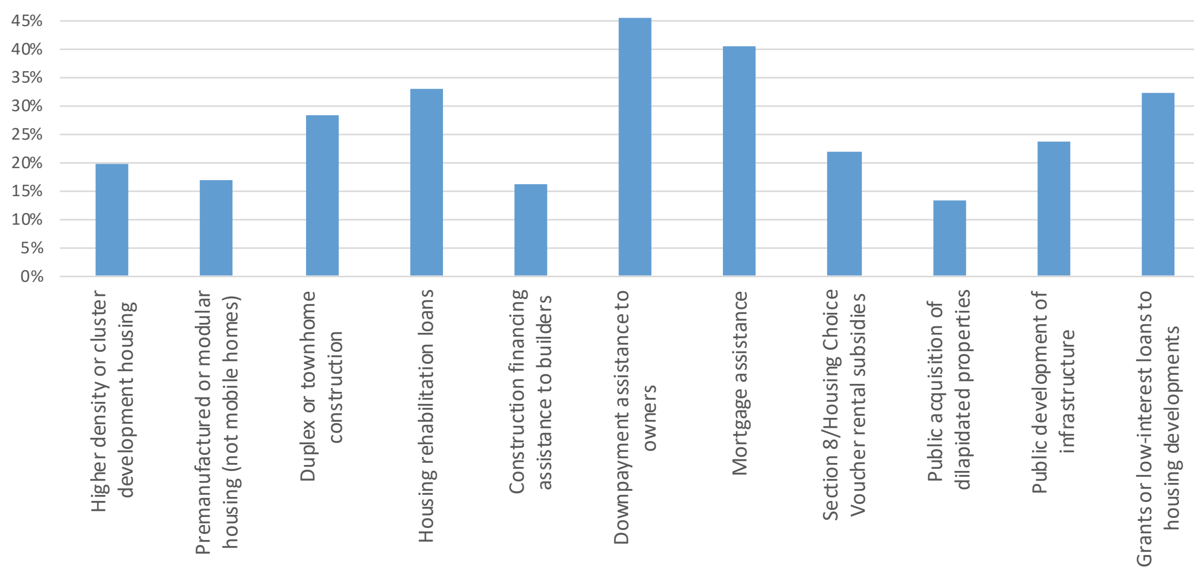


FIGURE 4.70: HOUSING SOLUTIONS SUPPORT TO REDUCE HOUSING COSTS IN JOHNSON COUNTY



CHAPTER FIVE

MID-TIER COMMUNITIES

Medium tier cities in Johnson County are evolving cities through land growth and redevelopment. While these cities currently have similar populations, some have opportunities to grow faster than others. The follow data illustrated different social and built characteristics to shape housing programs.

MERRIAM

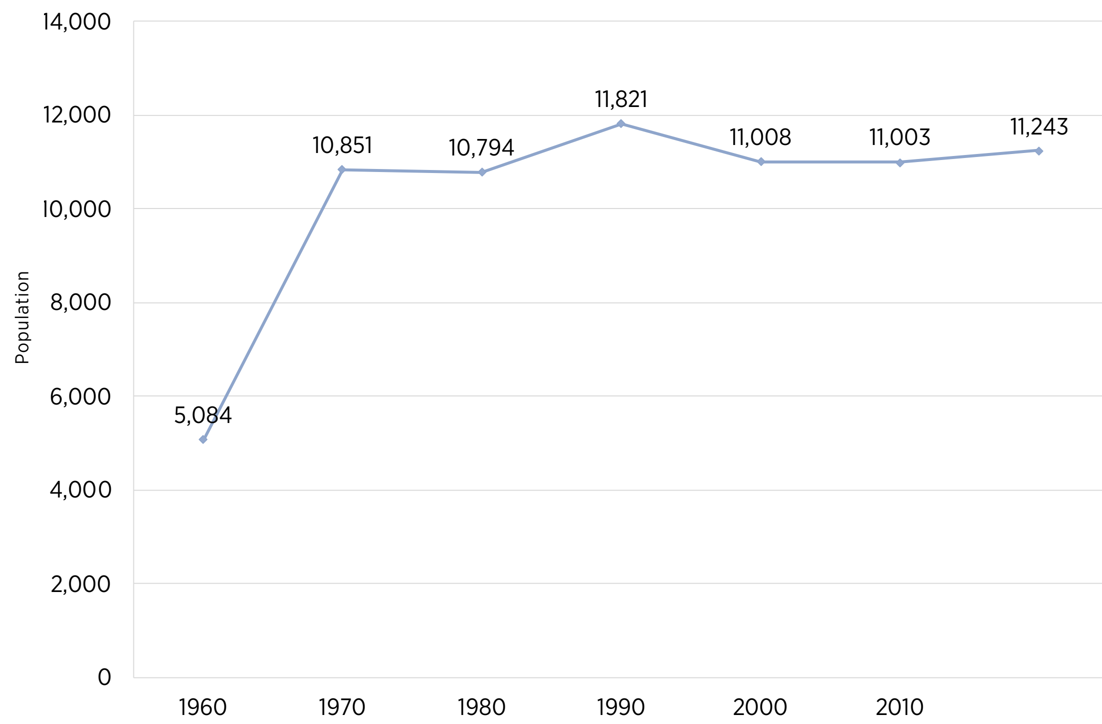
Merriam is a medium-sized, landlocked city in northern Johnson County. Interstate 35 bisects the city, which creates a sense of division between the two sides. However, this also gives the city good access to the metro, a benefit for people living in Merriam. Recently, Merriam has seen more redevelopment and infill interest, perhaps accelerated by the popular IKEA at the intersection of I-35 and W 63rd Street.

POPULATION CHANGE & FORECAST

The population in Merriam is stable since 2000 because of its land limitations. Some growth occurred since 2010 through redevelopment. Growth in the future will be generally limited to areas that can add more density. For example, re-purposing the mall site from underused commercial pads to mixed-use development. **Figure 5.1** shows the historical population change.

Merriam's objective is to add housing and commercial options to enhance the community as a desirable place to live. To that end, an optimistic and slightly aggressive growth rate is around 0.52% per year, used in the 2020 Comprehensive Plan Update. The rate anticipates increased redevelopment and dense projects in the next ten years which would result in about 600 new residents.

FIGURE 5.1: HISTORIC POPULATION CHANGE, MERRIAM



Source: U.S. Census; American Community Survey (2018 5-year Estimates)

> Downtown Merriam needs mixed use residential. It is such a missed opportunity. The location is probably the best in Johnson county. If we were to build high density mixed use housing in our downtown. People would flock to the area
>
> **- Survey Respondent**

HOUSING OCCUPANCY

Figure 5.2 shows occupancy characteristics in Merriam.

- The number of renters increased slightly since 2000 by about 3%.
- Vacancy rates are quite stable citywide, between about 5 and 6% from 2000-2018. A healthy market vacancy rate is around 6%.
- Household size is around 2.2 people per household which is on the lower end of other cities in Johnson County. This could indicate Merriam as a good market for those starting their careers and older households.
  - There is also a higher percentage of rental occupancy in Merriam compared to other cities. Renters are typically smaller households.

FIGURE 5.2: HOUSING OCCUPANCY, MERRIAM

	2000		2018 5YR		CHANGE 2000-2018
	NUMBER	% OF OCCUPIED UNITS	NUMBER	% OF OCCUPIED UNITS	
OWNER-OCCUPIED	2,925	59.7%	2,911	57.1%	-14
RENTER-OCCUPIED	1,975	40.3%	2,189	42.9%	214
TOTAL VACANT	324		317		-7
VACANCY RATE	6.2%		5.9%		
TOTAL UNITS	5,224		5,417		193

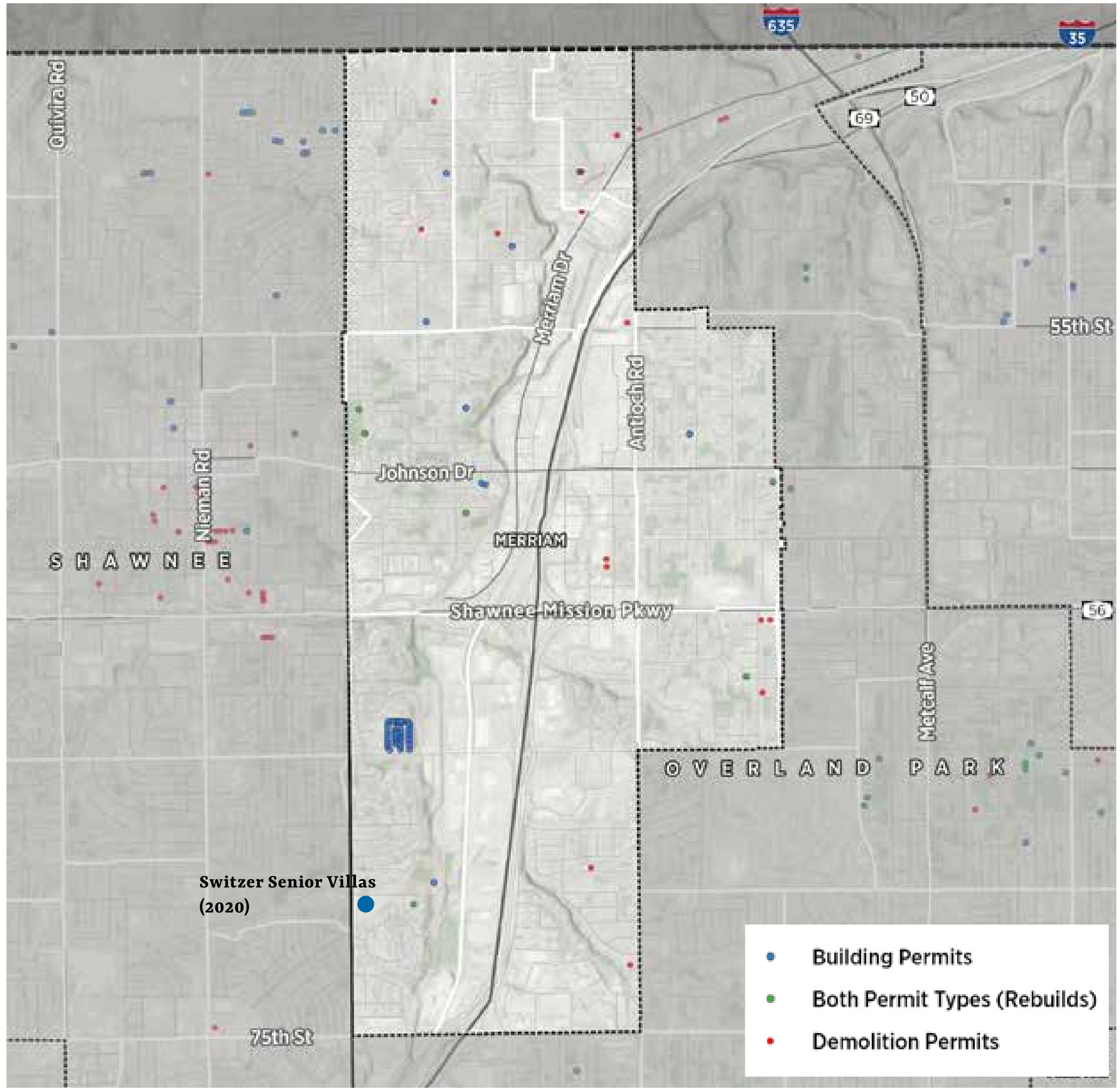
Source: U.S. Census; American Community Survey (2018 5-year Estimates)

CONSTRUCTION ACTIVITY

Opportunities for new construction in Merriam are difficult to create. The past ten years shows a steady construction of dwellings, but also a steady rate of demolitions. **Map 5.1** shows the location of permits. Between 2009 and 2019:

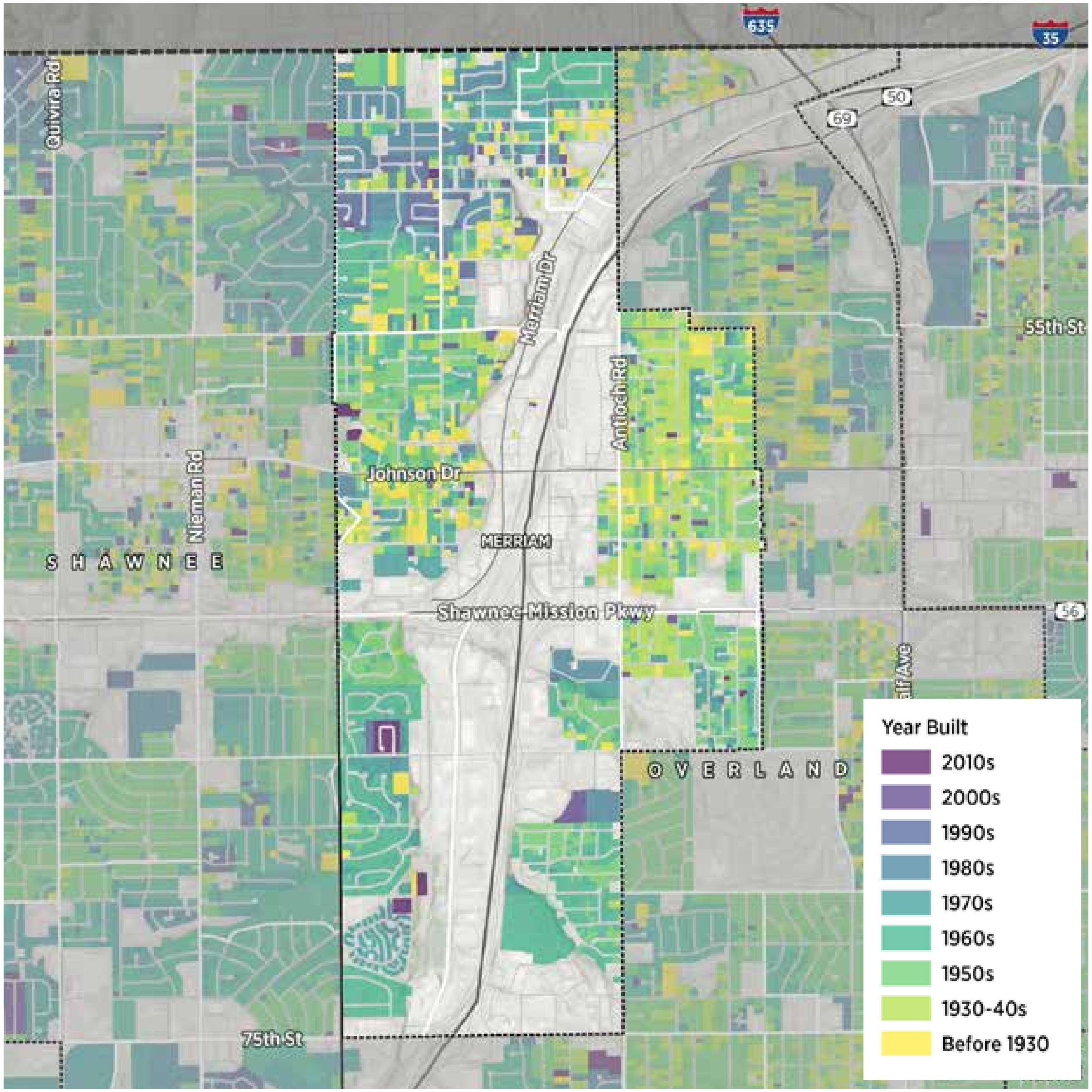
- About 85% of new units were single-family dwellings. The annual permits were generally under ten per year.
- About 15% of new units were multi-family units which include apartments, townhomes, and any structure with more than two units. All of these units were constructed in 2019.
- A few demolitions occurred each year. Demolitions at this rate are not concerning for a city with an older housing stock like Merriam. However, ideally these lots should not remain vacant after demolition.
- The map does not contain 2020 permit data, but an important project to note is the Switzer Senior Villas. The project added 45 senior living units to the market in 2020, located at Switzer Road and 71st Street. It includes both market rate and affordable units, using the Federal Low Income Housing Tax Credit program.

MAP 5.1: RESIDENTIAL NEW CONSTRUCTION PERMITS BY LOCATION (2010-2019), MERRIAM



Source: Johnson County GIS Department

MAP 5.2: YEAR BUILT, MERRIAM



Source: Johnson County GIS Department, Assessor Data

AGE OF HOUSING

Map 5.2 shows the year built of residential dwellings. The age of housing provides preliminary insight into areas more susceptible to deterioration and additional homeowner costs. Some of these areas have up to 20% cost-burdened owners. For these households, monitoring rehabilitation needs is even more important.

- Merriam has an established housing stock with nearly a third built before 1950. The age is reflective of the smaller footprint and condition of many homes in Merriam.
- Only about 22% of homes came onto the market after 1980.
- The map does not show the Switzer Senior Villas at the corner of Switzer Road and 71st Street completed in 2020.

"Downtown Merriam ... Affordable housing could help inject support for local businesses and encourage more to come to Merriam."

- Survey Respondent

HOME SALES

How quickly homes sell in a market is a leading indicator of housing demand and supply. **Figure 5.3** shows home sales data from 2017-2019. In Merriam, similar to other areas in the county:

- The average sales price of homes is increasing by more than inflation. The number sold each year is stable. People see homes in Merriam as more attainable. While sales prices are rising, they are still at an attainable range for many households.
- As a result, the average number of days a home remains on the market is decreasing to some of the lowest levels in the county. A home put on the market does not last long, often being sold in under a day.

"In Merriam we don't have much lower priced, single story, aging in place housing. This is what we will look for next and not sure we can stay in Merriam due to inadequate housing of this type."

- Survey Respondent

FIGURE 5.3: SINGLE FAMILY HOME SALES, MERRIAM

Source: Multiple Listings Service (2017-2019)

HOUSEHOLD INCOME AND COST BURDEN

Figure 5.4 shows the median household income is around $59,600, the lowest tier in the county. However, since 2010 median incomes grew at a rate close to the highest tier of the cities in Johnson County.

According to the U.S. Government, households spending more than 30% of their income on housing are considered cost-burdened. Additionally, a healthy, self-sustaining housing market will have a value to income ratio between 2 and 3. Merriam has a value to income ratio of 2.68, indicating a homeownership market that is not overly burdensome for many residents. Only about 9% of homeowners pay more than 30% of their income for homeownership.

However, renters appear to be more disproportionately affected by affordability. About 43% of renters pay more than 30% of their income on gross rent. The percentage has risen substantially since 2000 while the level of burden on home ownership decreased.

- Merriam has a lower median contract rent compared to other cities. However, rents could still be inflated for residents based on the quality of the units, which the high percentage of cost-burdened renters may indicate.
- Low rental supply, and thus a competitive market, often results in higher rental prices. Adding units to the market should create market pressures on older units to adjust rates down. This may happen when current redevelopment projects are completed.

VALUE TO INCOME RATIO: 2018

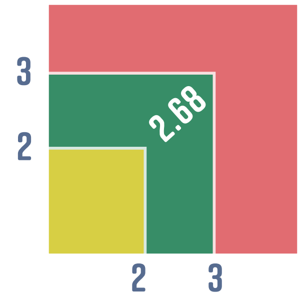


FIGURE 5.4: MEDIAN HOUSEHOLD INCOME COMPARISON

2018 MEDIAN INCOME RANGE	CITY	2010-2018 MEDIAN INCOME PERCENT CHANGE RANGE	CITY
<$60,000	• DE SOTO • EDGERTON • MERRIAM	<10%	• DE SOTO • EDGERTON • FAIRWAY • LAKE QUIVIRA • MISSION WOODS • SPRING HILLS
$60,000 - $80,000	• GARDNER • MISSION • ROELAND PARK • SPRING HILLS	10% - 15%	• LEAWOOD • LENEXA • MISSION HILLS • OLATHE • PRAIRIE VILLAGE • WESTWOOD
$80,000 - $100,000	• LENEXA • OLATHE • OVERLAND PARK • PRAIRIE VILLAGE • SHAWNEE • WESTWOOD • JOHNSON COUNTY	15% - 20%	• JOHNSON COUNTY • GARDNER • MERRIAM • OVERLAND PARK • SHAWNEE
>$100,000	• FAIRWAY • LAKE QUIVIRA • LEAWOOD • MISSION HILLS • MISSION WOODS • WESTWOOD HILLS	>20%	• MISSION • ROELAND PARK • WESTWOOD HILLS

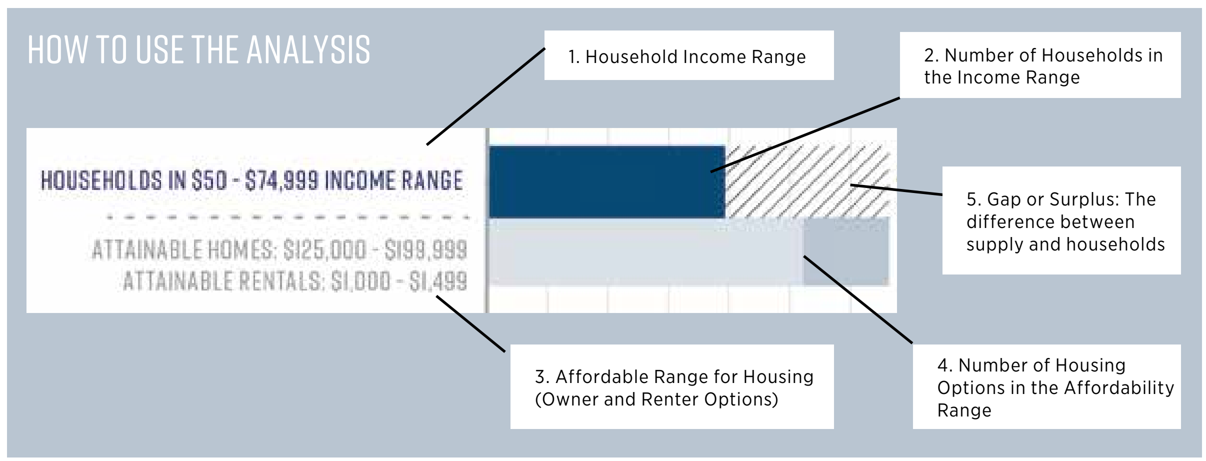
Source: American Community Survey (2018 5-year Estimates)

HOUSING ATTAINABILITY AND SUPPLY ANALYSIS

By comparing the distribution of household incomes with housing costs, a picture of supply and demand emerges across all of Merriam's housing market. **Figure 5.5** examines supply and demand through the lens of what is "affordable" to different income groups to answer the question: is there an adequate supply of housing options available for residents of different income groups?

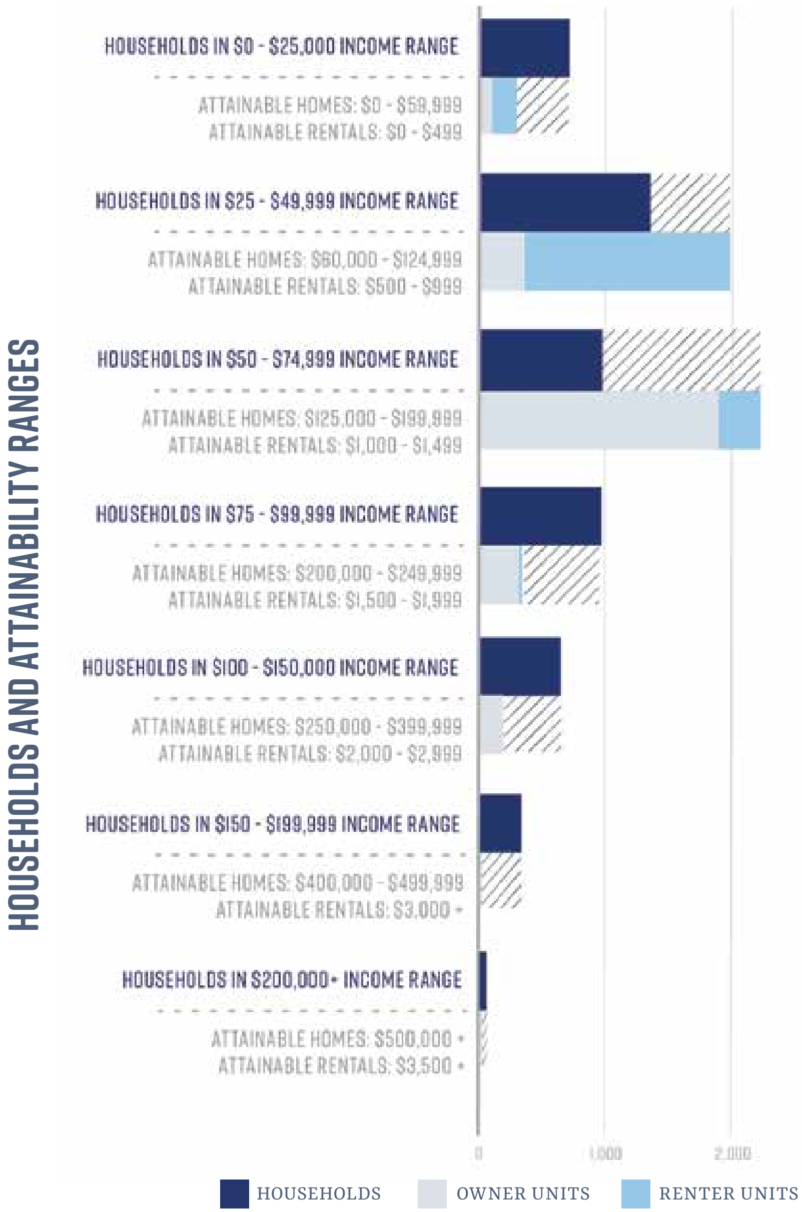
Figure 5.5 illustrates five major components in pursuit of the above story:

1. **Income Ranges.** The starting point of the analysis is the spectrum of incomes across all residents of Merriam. From these incomes, corresponding "affordable" housing prices are established for ownership and rental opportunities.
2. **Number of Households in Each Income Range.** The number of households in each income range is the demand; these residents seek housing options in Merriam that are affordable to them.
3. **Affordability Ranges.** An affordable ownership home is calculated at 2-3 times the household income depending on the income range. Lower income households tend to spend a higher percentage of their income on housing and higher income households tend to spend a lower percentage of their total income on housing. An affordable rental would be about 20% of household income.
4. **Number of Housing Units in Each Affordability Range.** The number of housing units in each affordability range is the supply of affordable options.
   - Composition of Housing Supply. This illustrates the share of the supply met by ownership and renter housing options.
5. **The Balance of Supply and Demand.**
   - If the number of households exceeds the number of units available, those households must seek options in different affordability ranges.
   - If the number of units exceeds the number of households, it indicates that the units are occupied by households in different income ranges.
   - **This analysis is meant to illustrate larger trends in how existing units are being occupied. It does not demonstrate exact market demand in certain price ranges.**



The analysis in **Figure 5.5** is based on all the households today that are occupying a unit. No household is without a unit.

FIGURE 5.5: HOUSING ATTAINABILITY,MERRIAM (2018)



Source: American Community Survey (2018 5-year Estimates); RDG Planning & Design

Many of the units priced for incomes between $25,000 and $75,000 see competition from both lower income and upper income brackets.

- There are more households than attainable options. These households must resort to more expensive housing options. However, some of these households often occupy homes above their incomes that are owned outright.

- There are many units that would be attainable for household's making between $25,000 and $75,000. This price point reflects the older housing stock in Merriam. These units should be maintained as attainable options for many households in the future. However, many of the units in this range see competition from both lower income and upper income brackets.

- There are limited options that could be attainable for households in higher income ranges making more than $75,000. Most housing for these income ranges will be owner-occupied housing.
  - The gaps indicate new homes priced above $200,000 and rentals above $1,500 a month are viable, attainable options in Merriam.
  - Over 750 households making over $100,000 a year are living in owner-occupied units priced below $250,000.
  - They do this for a variety of reasons, including housing cost and neighborhood preferences in addition to a lack of other options above this price range.

HOUSING DEMAND

The housing demand analysis builds on the population projections, housing trends, and community conversations to forecast the demand for additional housing. The model is built on the following assumptions with a 0.52% annual growth rate:

- The proportion of the household population (those living in households and not in skilled nursing or prisons) will remain stable through 2030.
- Average people per household is expected to remain constant over the next decade. Some growth may occur as Millennials move into their childbearing years, but Baby Boomer households will also continue to shrink.
- Unit demand at the end of the period is calculated by dividing household population by the number of people per household. This equals the number of occupied housing units.
- A manageable housing vacancy provides housing choices for residents moving to the community. As noted earlier, the rate in Merriam is stable at around 6%.
- Unit needs at the end of each period are based on the actual household demand and projected vacant units.
- Replacement need is the number of housing units demolished or converted to other uses. Homes in poor condition or obsolete should be gradually replaced in a city's housing supply. The number of units lost annually is based on historic demolition rates.

FIGURE 5.6: HOUSING DEMAND MODEL, MERRIAM

	2020	2025	2030	TOTAL
POPULATION AT END OF PERIOD	11,359	11,656	11,959	
HOUSEHOLD POPULATION AT END OF PERIOD	11,200	11,492	11,792	
AVERAGE PEOPLE PER HOUSEHOLD	2.21	2.21	2.21	
HOUSEHOLD DEMAND AT END OF PERIOD	5,068	5,200	5,336	
PROJECTED VACANCY RATE	6.0%	6.0%	6.0%	
UNIT NEEDS AT END OF PERIOD	5,392	5,532	5,676	
REPLACEMENT NEED (TOTAL LOST UNITS)		10	10	20
CUMULATIVE NEED DURING PERIOD		151	154	305
AVERAGE ANNUAL CONSTRUCTION		30	31	30

Source: RDG Planning & Design

- Cumulative need shows the number of total units needed between the base year of 2020 and the year indicated at the end of the period.
- **Figure 5.6** shows an average annual construction need of 30 units. The average annual construction rate from 2009 to 2019 was 7 units, with a high of 12 in 2013 and 2019 and a low of 0 in 2009.
  - This may seem like an out of reach construction need. However, one major redevelopment project could satisfy the need over many years. The average annual construction does not mean these units must be split evenly.
    - For example, the Switzer Senior Villas added 45 units in 2020 alone. The project contains income restricted units for those 55 and over, a needed product across Johnson County.

DEVELOPMENT PROGRAM

Building on the housing demand model, the development program forecasts production targets for owner and renter-occupied units based on the following assumptions:

- Owner-occupied units will be distributed roughly in proportion to the income distributions of the households for whom owner occupancy is appropriate.
- Most low-income residents will be accommodated in rental units.
- Over the next ten years, production levels need to balance to provide the housing variety necessary for a growing population. Therefore, the model illustrated in **Figure 5.7** targets a split of 55% owner- and 55% renter-occupied units. Owner units also include condos sold for individual ownership.

- Approximately 126 additional owner-occupied units should be priced below $250,000. This demand will come through the city's existing housing stock being freed up through move-up housing, or products that do not fit the traditional detached single-family homes.
- About 71 rental units will need to be produced with rents below $1,000 per month. These units will have to be generated through existing rentals being freed up with new market rate rental construction.

COMMUNITY PERCEPTIONS

A total of 111 residents completed the community survey. Key takeaways from the survey are:

- The majority of respondents felt there was a lack of housing available for multi-generational families, people with a physical and/or mental disability, students, workers making less than $16 an hour, and households that need close transit access in Merriam.
- Most respondents were not looking to change housing in the next three years. Those that are looking primarily were looking to up-size to a larger owner-occupied house or move to a different community for quality of life reasons.
- There was not an overwhelming amount of support for any of the programs proposed to lower housing costs. The two that received the most support were down payment assistance to owners (38%) and housing rehabilitation loans (35%).

FIGURE 5.7: HOUSING DEVELOPMENT PROGRAM, MERRIAM

	2025		2030		2020-2030	
TOTAL OWNER OCCUPIED						
ATTAINABLE: <$200,000	44	83	45	85	89	168
MODERATE MARKET: $200-250,000	18		19		37	
MARKET: $250-350,000	12		13		25	
HIGH MARKET: OVER $350,000	8		8		17	
TOTAL RENTER OCCUPIED						
ATTAINABLE: LESS THAN $1,000	35	68	36	69	71	137
MARKET: $1,000-1,500	17		17		33	
HIGH MARKET: $1,500+	16		17		33	
TOTAL NEED		151		154		305

Source: RDG Planning & Design

LISTENING SESSIONS

Many people familiar with the housing market specific to Merriam participated in small group discussions. These included representatives from the City Council, Planning Commission, staff, and real estate agents, among others.

COMMON COMMENTS

Aside from common themes in Chapter 2 that pertain to the entire county, several common themes are apparent to Merriam.

- Merriam has a larger lot size diversity, which offers opportunities for things like accessory dwelling units.
- A transition is happening where a lot of homeowners are aging and the population is turning over. Most of the current population is either elderly or just putting down roots as young families.
  - These older households are starting to feel isolated because they don’t have access to public transportation.
- Several people expressed knowledge of existing grant programs in Merriam for rehabilitation and repair, knowledge not as widely know or available in other cities.
- Mixed-use development in Merriam is an opportunity, especially in the downtown and Town Center area.

MISSION

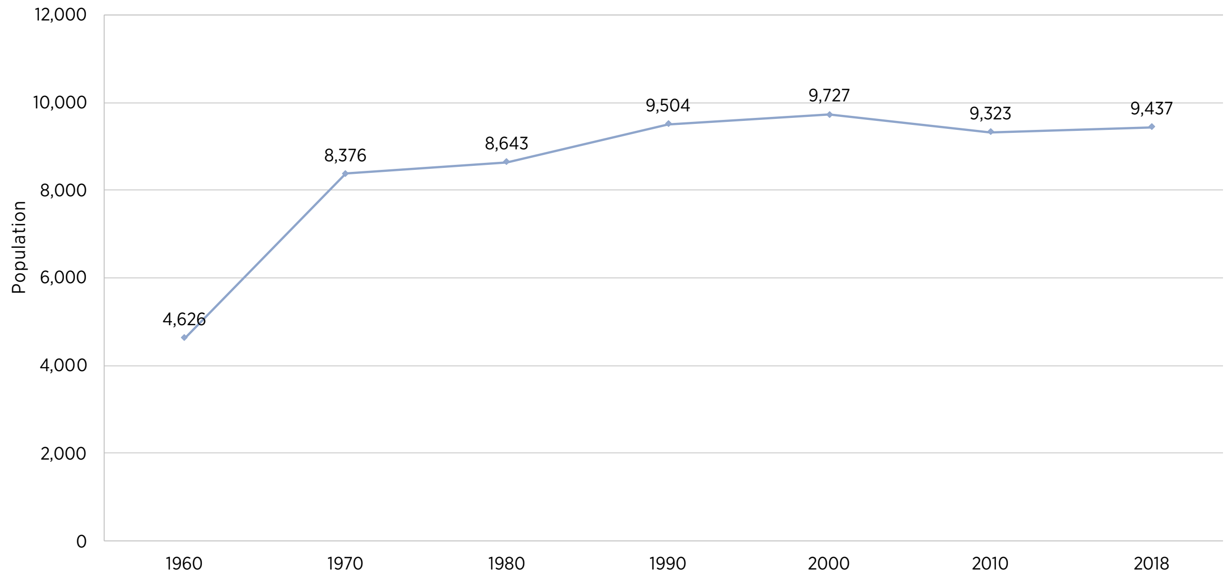
Mission is a medium size, landlocked city in northern Johnson County. Interstate 35 forms the northern city limits while Highway 69 the western and Highway 169 the southern boundary. This gives the city good access to the metro, a benefit for people living in Mission. A large commercial and jobs center exists at the center of the community.

POPULATION CHANGE

Population fluctuated since 1960 with decades of alternating growth and decline. Most recently, Mission has maintained a fairly stable population with slight growth since 2010, as shown in **Figure 5.8**. Recent growth has not come from additional housing units but is likely a combination of in-migration of younger age groups with families.

Mission's population is predicted to grow by just over 1% according to MARC and a higher ambitious rate according to a local plan. Given recent growth and construction trends, a more conservative 0.75% growth rate is used, leading to an increase of 885 new residents by 2030. While this rate may seem low compared to the other projections, this will require a substantial increase in construction rates to accommodate the population. Much will be accommodated in the short-term through the Gateway and Locale mixed-use development projects which will add more than 350 higher end rental units to the market.

FIGURE 5.8: HISTORIC POPULATION CHANGE, MISSION



Source: U.S. Census; American Community Survey (2018 5-year Estimates)

> Prices might be too high for young professionals first time home owners. I would like more incentives for younger adults to move into Mission.
>
> **- Survey Respondent**

HOUSING OCCUPANCY

Figure 5.9 shows occupancy characteristics in Mission.

- The number of renters, already a large share of the housing market, increased slightly since 2000 by almost 4%.
- Vacancy rates are quite stable citywide, reflecting a healthy market vacancy rate around 6%.
- Household size is around 1.86 people per household which is on the lower end of other cities in Johnson County, indicative of the high percentage of rental occupancy. This could indicate Mission as a good market for those starting their careers and older households.

FIGURE 5.9: HOUSING OCCUPANCY, MISSION

	2000		2018 5YR		CHANGE 2000-2018
	NUMBER	% OF OCCUPIED UNITS	NUMBER	% OF OCCUPIED UNITS	
OWNER-OCCUPIED	2,446	48.9%	2,134	46.1%	-312
RENTER-OCCUPIED	2,554	51.1%	2,491	53.9%	-63
TOTAL VACANT	477		286		-191
VACANCY RATE	8.7%		5.8%		
TOTAL UNITS	5,477		4,911		-566

Source: U.S. Census; American Community Survey (2018 5-year Estimates)

CONSTRUCTION ACTIVITY

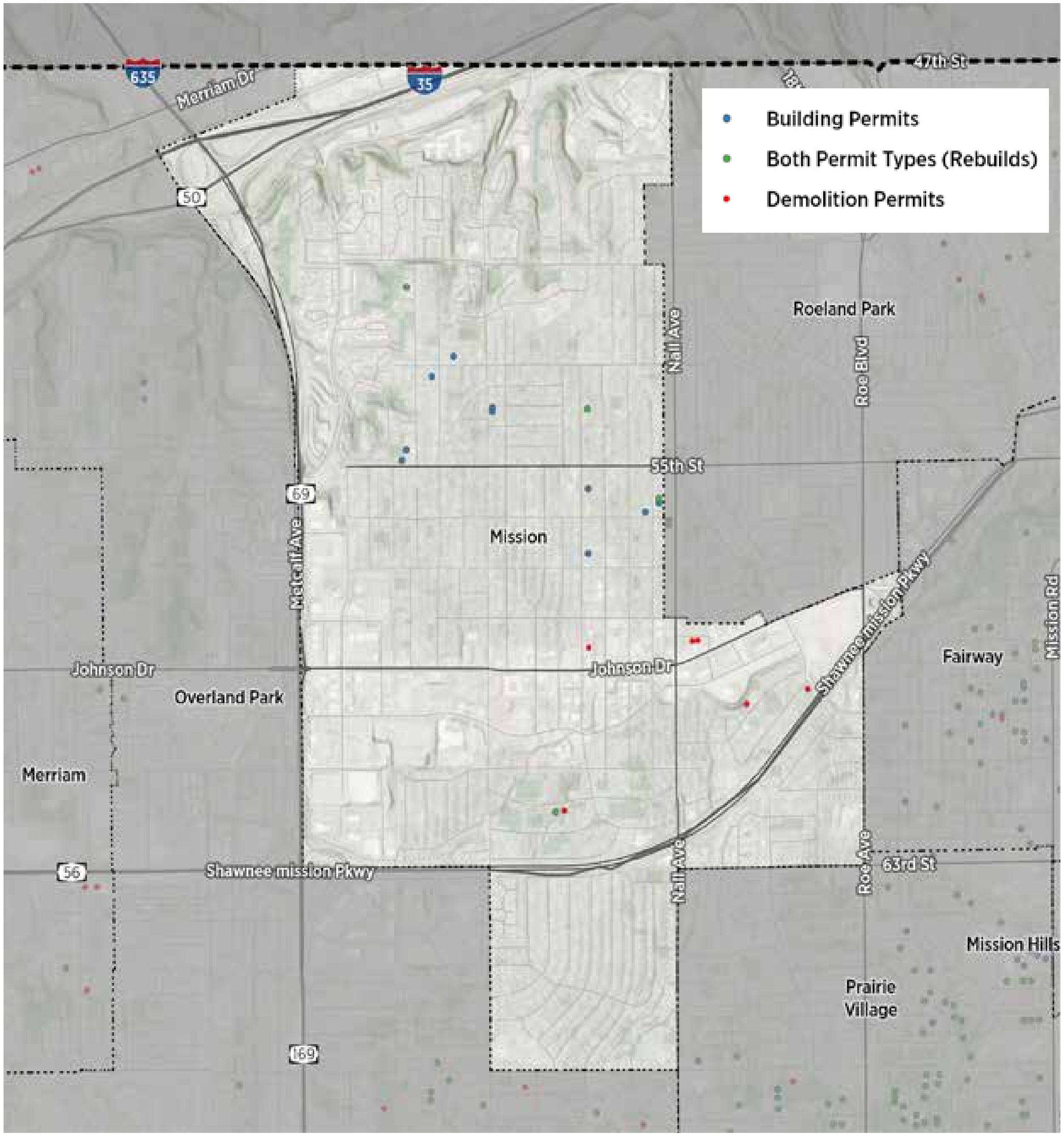
Opportunities for new construction in Mission are challenging to create. The past ten years show a low construction of dwellings and demolitions. **Map 5.3** shows the location of permits. Between 2009 and 2019:

- Single-family dwellings accounted for all construction activity since 2010 at an average of only 1.4 annually.
- A total of 12 demolitions occurred since 2010. Only a few of these were demolition-rebuilds; many were left as vacant lots.

"I would love to stay in Mission. We have four kids and finding housing large enough or on a lot big enough to expand is very limiting."

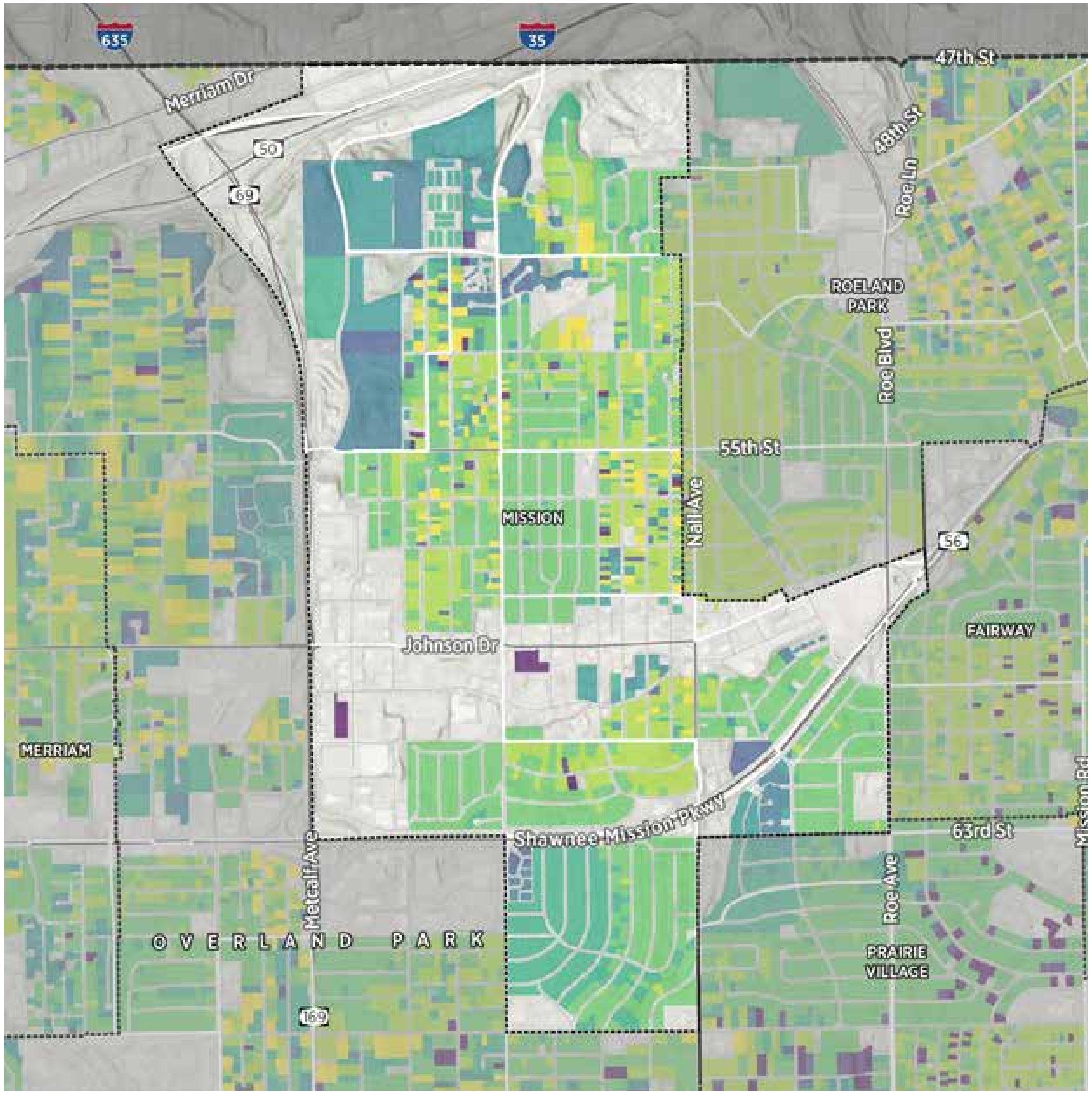
- Survey Respondent

MAP 5.3: RESIDENTIAL NEW CONSTRUCTION PERMITS BY LOCATION (2010-2019), MISSION



Source: Johnson County GIS Department

MAP 5.4: YEAR BUILT, MISSION

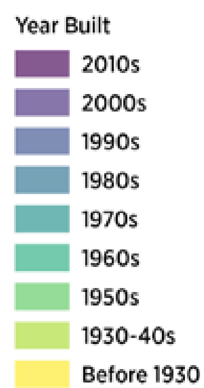


Source: Johnson County GIS Department

AGE OF HOUSING

Map 5.4 shows the year built of residential dwellings. The age of housing provides preliminary insight into areas more susceptible to deterioration and additional homeowner costs. If these areas are also occupied by lower income households then monitoring of rehabilitation needs is even more important.

- Mission has a well-balanced housing stock, with no one decade comprising the major of units.
- While many units were built prior to 1980, about 26% were built since then, but not many since 2000.



HOME SALES

How quickly homes sell in a market is a leading indicator of housing demand and supply. **Figure 5.10** shows home sales data from 2017-2019. In Mission, similar to other areas in the county:

- The average sales price is increasing by about $20,000 each year, which is higher than inflation.
- The number of days on market is dropping from an already low number. This reflects the competitive market buyers are currently seeing with homes selling extremely fast.

"Mission is one of the few places that offers housing for lower income Johnson Countians. The County needs to increase housing opportunities for lower income people. Ex. teachers should be able to afford to live in the school districts that they teach in."

- Survey Respondent

FIGURE 5.10: SINGLE FAMILY HOME SALES, MISSION

Source: Multiple Listings Service (2017-2019)

HOUSEHOLD INCOME AND COST BURDEN

Figure 5.11 shows median household income is 4th lowest in Johnson County at $60,875. However, since 2010 median incomes grew about 26%, in the highest tier among other cities in the county.

According to the U.S. Government, households spending more than 30% of their income on housing are considered cost-burdened. Additionally, a healthy, self-sustaining housing market will have a value to income ratio between 2 and 3.

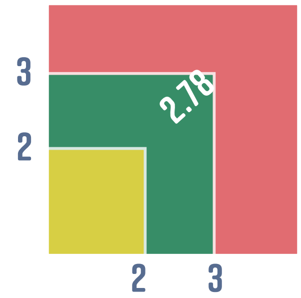
- Mission has a value to income ratio of 2.78, indicating a homeownership market that is not overly burdensome for many residents. This rate has dropped from 3.10 in 2010 indicating improvement in the ownership market.
  - › Despite improvements, 23% of homeowners pay more than 30% of their income for homeownership
  - › Rents are increasing at a similar rate to incomes.
- Renters appear to be disproportionately affected by affordability. About 37% of renters pay more than 30% of their income on gross rent. Median contract rent levels ($812) remain on the lower end of cities in Johnson County.

FIGURE 5.11: MEDIAN HOUSEHOLD INCOME COMPARISON

2018 MEDIAN INCOME RANGE	CITY	2010-2018 MEDIAN INCOME PERCENT CHANGE RANGE	CITY
<$60,000	• DE SOTO • EDGERTON • MERRIAM	<10%	• DE SOTO • EDGERTON • FAIRWAY • LAKE QUIVIRA • MISSION WOODS • SPRING HILLS
$60,000 - $80,000	• MISSION • GARDNER • ROELAND PARK • SPRING HILLS	10% - 15%	• LEAWOOD • LENEXA • MISSION HILLS • OLATHE • PRAIRIE VILLAGE • WESTWOOD
$80,000 - $100,000	• LENEXA • OLATHE • OVERLAND PARK • PRAIRIE VILLAGE • SHAWNEE • WESTWOOD • JOHNSON COUNTY	15% - 20%	• JOHNSON COUNTY • GARDNER • MERRIAM • OVERLAND PARK • SHAWNEE
>$100,000	• FAIRWAY • LAKE QUIVIRA • LEAWOOD • MISSION HILLS • MISSION WOODS • WESTWOOD HILLS	>20%	• MISSION • ROELAND PARK • WESTWOOD HILLS

Source: American Community Survey (2018 5-year Estimates)

VALUE TO INCOME RATIO: 2018

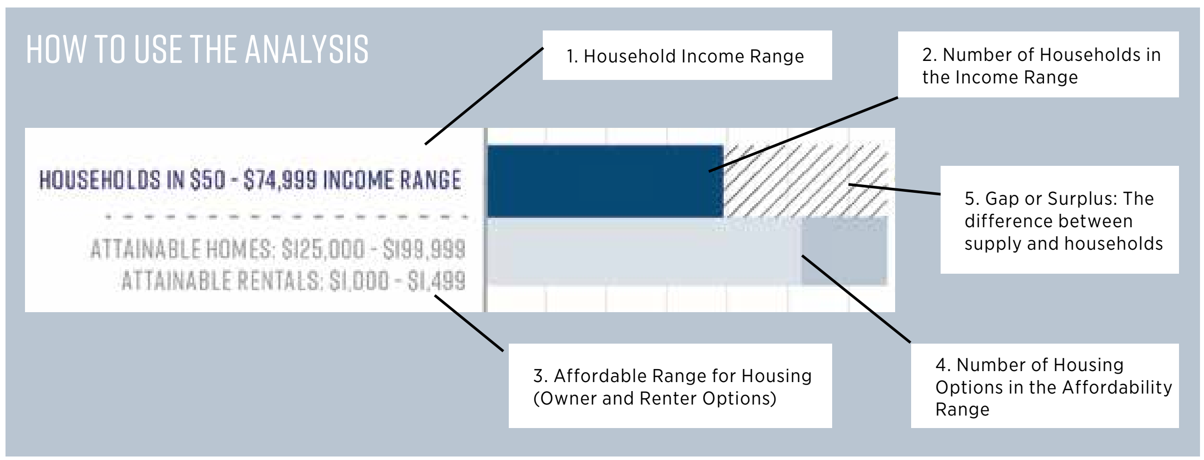


HOUSING ATTAINABILITY AND SUPPLY ANALYSIS

By comparing the distribution of household incomes with housing costs, a picture of supply and demand emerges across all of Mission's housing market. **Figure 5.12** examines supply and demand through the lens of what is "affordable" to different income groups to answer the question: is there an adequate supply of housing options available for residents of different income groups?

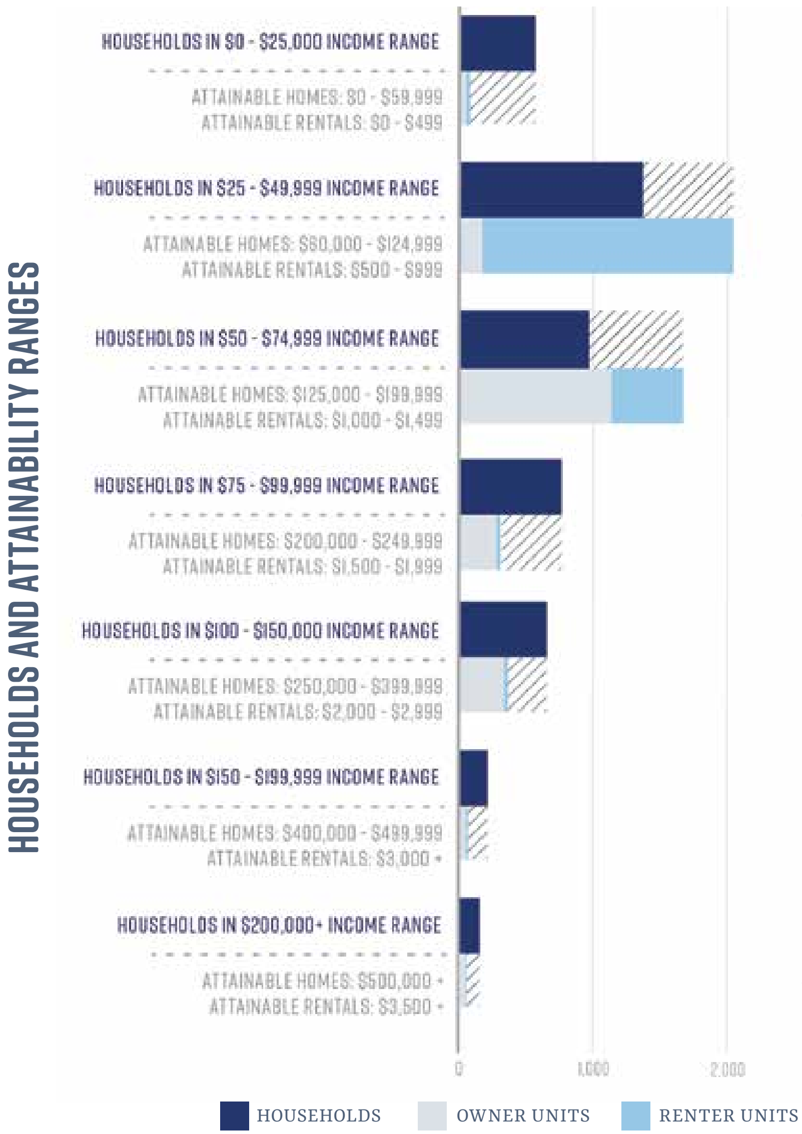
Figure 5.12 illustrates five major components in pursuit of the above story:

1. **Income Ranges.** The starting point of the analysis is the spectrum of incomes across all residents of Mission. From these incomes, corresponding "affordable" housing prices are established for ownership and rental opportunities.
2. **Number of Households in Each Income Range.** The number of households in each income range is the demand; these residents seek housing options in Mission that are affordable to them.
3. **Affordability Ranges.** An affordable ownership home is calculated at 2-3 times the household income depending on the income range. Lower income households tend to spend a higher percentage of their income on housing and higher income households tend to spend a lower percentage of their total income on housing. An affordable rental would be about 20% of household income.
4. **Number of Housing Units in Each Affordability Range.** The number of housing units in each affordability range is the supply of affordable options.
   - Composition of Housing Supply. This illustrates the share of the supply met by ownership and renter housing options.
5. **The Balance of Supply and Demand.**
   - If the number of households exceeds the number of units available, those households must seek options in different affordability ranges.
   - If the number of units exceeds the number of households, it indicates that the units are occupied by households in different income ranges.
   - **This analysis is meant to illustrate larger trends in how existing units are being occupied. It does not demonstrate exact market demand in certain price ranges.**



The analysis in **Figure 5.12** is based on all the households today that are occupying a unit. No household is without a unit.

FIGURE 5.12: HOUSING ATTAINABILITY,MISSION (2018)



Source: American Community Survey (2018 5-year Estimates); RDG Planning & Design

Mission has many units that would be attainable for households making between $50,000 and $75,000. However, many units in this range see competition from both lower and upper income brackets.

- Many of these households often occupy homes above their incomes when owned outright, such as retirees. For example:
  - 33% of all owner-occupied households in Shawnee are over the age of 65.
  - The median household income for households over 65 is estimated at about $49,000, meaning that 50% of those households make less than $49,000.
  - Additionally, 64% of owner-occupied households over the age of 65 do not have a mortgage.

- There are limited rental options above $1,000. Lower and higher income groups who must rent are all generally competing for the same price point.

- There are many units that would be attainable for households making between $50,000 and $75,000. This price point reflects the older housing stock in Mission. These units should be maintained as attainable options for many households in the future. However, many of the units in this range see competition from both lower income and upper income brackets.

- There are limited units that would be attainable for households in higher income ranges making more than $75,000. Most housing for these income ranges will be in the form of owner-occupied housing.
  - The gap indicates that new homes priced above $200,000 and rentals above $1,500 a month could be viable options in Mission. Adding these units could free up more attainable units for lower-income residents to fill.

COMMUNITY PERCEPTIONS

A total of 158 residents completed the community survey. Key takeaways from the survey are:

- The majority of respondents felt there was a lack of housing available for workers making less than $16 an hour in both Mission and Johnson County as a whole.
- Most respondents were not looking to change housing in the next three years, but those that were primarily were looking to up-size to a larger owner-occupied house.
- Of the housing solutions proposed, 48% of respondents would support down payment assistance to owners and 39% supported mortgage assistance.

LISTENING SESSIONS

Many people familiar with the housing market specific to Mission participated in small group discussions. These included representatives from the City Council, Planning Commission, staff, and real estate agents, among others.

COMMON COMMENTS

Aside from common themes in Chapter 2 that pertain to the entire county, several common themes are specific to Mission.

- Mission does have some of the most diverse attainable housing options in Johnson County.
- There is a desire to create more density around existing commercial developments, supported by leaders and the community.
- The portion of the city under a form-based code does create some confusion for developers with a need to educate more on its requirements.
- There are more maintenance issues in Mission than in other cities, but people understand Mission provides some options for lower income households.

HOUSING DEMAND

The housing demand analysis builds on the population projections, housing trends, and community conversations to forecast the demand for additional housing. The model is built on the following assumptions with a 0.50% growth rate:

- The proportion of the household population (those living in households and not in skilled nursing or prisons) will remain stable through 2030.
- Average people per household is expected to remain low over the next decade with some new apartment redevelopment projects and family turnover. Some growth may occur as Millennials move into their childbearing years, but Baby Boomer households will also continue to shrink.
- Unit demand at the end of the period is calculated by dividing household population by the number of people per household. This equals the number of occupied housing units.
- A manageable housing vacancy provides housing choices for residents moving to the community. Mission's is stable and is maintained in the future. As noted earlier, the county's rate is slightly high but likely reflects the point in time that it was gathered.
- Unit needs at the end of each period are based on the actual household demand and projected vacant units.
- Replacement need is the number of housing units demolished or converted to other uses. Homes in poor condition or obsolete should be gradually replaced in a city’s housing supply. The number of units lost annually is based on recent trends that reflect and older housing stock but still not at extreme levels.
- Cumulative need shows the number of total units needed between the base year of 2020 and the year indicated at the end of the period.

- **Figure 5.13** shows an average annual construction need of 45 units. The average annual construction rate from 2010 to 2019 was 1.4 units, with a high of 3 in 2019.
  - Mission's development model will not evolve at consistently 45 units per year. Rather, units will be added in "chunks" as redevelopment projects are completed, a couple in the first five years in particular.

DEVELOPMENT PROGRAM

Building on the demand model, the development program forecasts production targets for owner and renter-occupied units with the following assumptions:

- Owner-occupied units will be distributed roughly in proportion to the income distributions of the households for whom owner occupancy is an appropriate strategy.
- Most low-income residents will be accommodated in rental units.
- Over the next ten years, production levels need to balance to provide the housing variety necessary for a growing population. Therefore, the model illustrated in **Figure 5.14** targets a split of 50% owner- and 50% renter-occupied units. Owner units also include condo units that have individual ownership.
- Approximately 168 additional owner-occupied units should be priced below $250,000. This demand will come through the city's existing housing stock being freed up through move-up housing as higher priced options come online.
- Nearly 117 rental units produced with rents below $1,000 per month. Similarly, these units will free up from the existing stock as luxury units are produced, studios priced in this range, or generated through programs like low-income housing tax credits.

FIGURE 5.13: HOUSING DEMAND MODEL, MISSION

	2020	2025	2030	TOTAL
POPULATION AT END OF PERIOD	9,579	9,944	10,322	
HOUSEHOLD POPULATION AT END OF PERIOD	9,579	9,944	10,322	
AVERAGE PEOPLE PER HOUSEHOLD	1.86	1.86	1.86	
HOUSEHOLD DEMAND AT END OF PERIOD	5,150	5,346	5,550	
PROJECTED VACANCY RATE	6.0%	6.0%	6.0%	
UNIT NEEDS AT END OF PERIOD	5,479	5,687	5,904	
REPLACEMENT NEED (TOTAL LOST UNITS)		10	10	20
CUMULATIVE NEED DURING PERIOD		219	226	445
AVERAGE ANNUAL CONSTRUCTION		44	45	45

Source: RDG Planning & Design

FIGURE 5.14: HOUSING DEVELOPMENT PROGRAM, MISSION

	2025		2030		2020-2030	
TOTAL OWNER OCCUPIED						
ATTAINABLE: <$200,000	63	109	65	113	127	223
MODERATE MARKET: $200-250,000	20		21		41	
MARKET: $250-350,000	18		19		36	
HIGH MARKET: OVER $350,000	8		9		17	
TOTAL RENTER OCCUPIED						
ATTAINABLE: LESS THAN $1,000	58	109	59	113	117	223
MARKET: $1,000-1,500	29		30		59	
HIGH MARKET: $1,500+	23		23		46	
TOTAL NEED		219		226		445

Source: RDG Planning & Design

ROELAND PARK

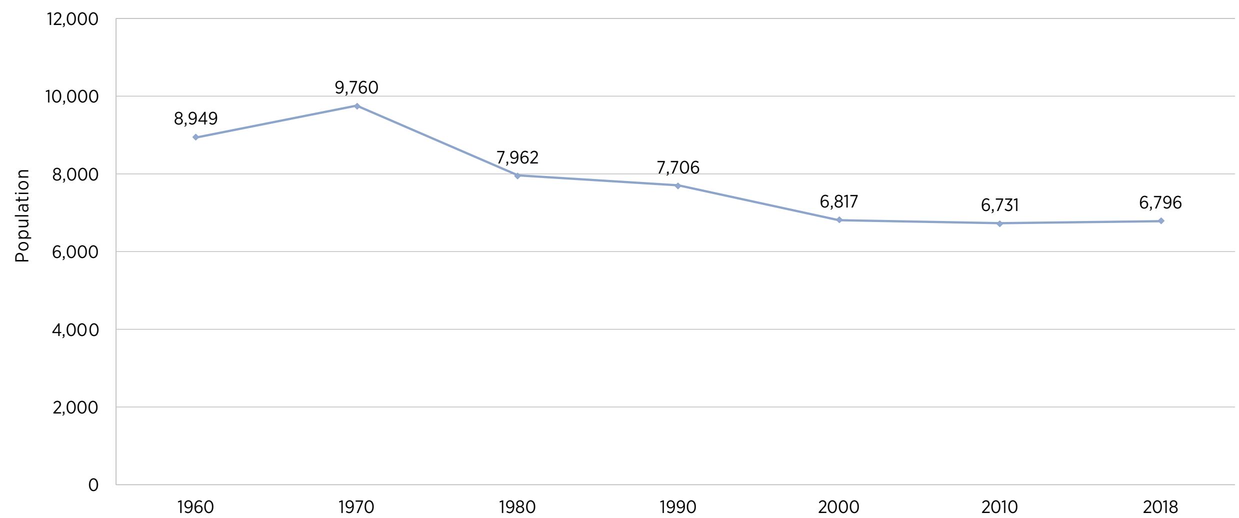
Roeland Park is a medium size, landlocked city just south of I-35 in Johnson County. A large commercial district is located along Highway 69 including big-box retailers like Walmart and Lowes. The housing stock is primarily older single-family dwellings. Several blocks on the eastern city limits are home to primary educational facilities.

POPULATION CHANGE

Population in Roeland Park has been relatively stable since 2000 because of its land limitations. **Figure 5.15** shows the historical population change trending down since the population peak of 9,760 residents in 1970.

Roeland Park's objective is to maintain its population and enhance the community as a desirable place to live while accommodating existing older populations. To that end, a slight growth rate forecasted by MARC is around 0.06% per year. The rate anticipates some transition from older households to families and selected mixed-use opportunities that would add density in the next ten years. This rate would result in about 49 new residents.

FIGURE 5.15: HISTORIC POPULATION CHANGE, ROELAND PARK



Source: U.S Census; American Community Survey (2018 5-year Estimates)

HOUSING OCCUPANCY

Figure 5.16 shows occupancy characteristics in Roeland Park.

- The number of renters increased slightly since 2000 by about 3%.
- Vacancy rates are quite stable citywide at 6% from 2000-2018. A healthy market vacancy rate is around 6%.
- Household size is around 2.2 people per household, which is on the lower end of other cities in Johnson County. This could indicate there are not many family households in Roeland Park.

FIGURE 5.16: HOUSING OCCUPANCY, ROELAND PARK

	2000		2018 5YR		CHANGE 2000-2018
	NUMBER	% OF OCCUPIED UNITS	NUMBER	% OF OCCUPIED UNITS	
OWNER-OCCUPIED	2,370	77.3%	2,290	74.4%	-80
RENTER-OCCUPIED	695	22.7%	790	25.6%	95
TOTAL VACANT	217		222		5
VACANCY RATE	6.6%		6.7%		
TOTAL UNITS	3,282		3,302		20

Source: U.S. Census; American Community Survey (2018 5-year Estimates)

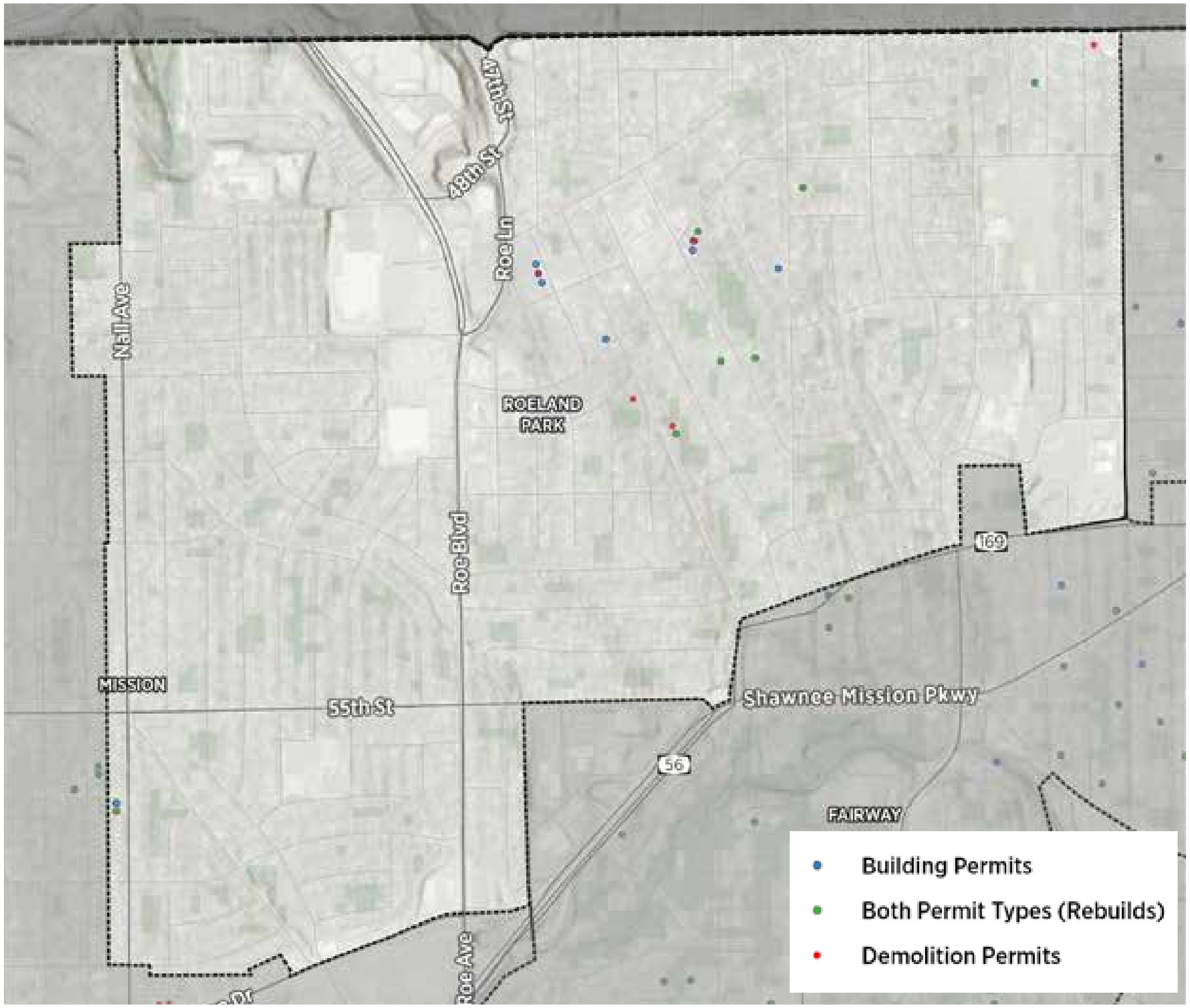
CONSTRUCTION ACTIVITY

Roeland Park has seen no net new housing unit construction since 2010. While there were 15 new single-family homes constructed, a total of 15 demolitions also occurred. Most construction activity occurred between 2016 and 2017. Only one unit was built between 2018 and 2019.

"Most Roeland Park homes lack universal design features for persons of all ages & abilities; most housing is old stock that is not in step with energy-saving features. Current building codes do not reflect a comprehensive plan to encourage or require universal design and energy-saving features in new construction or remodels"

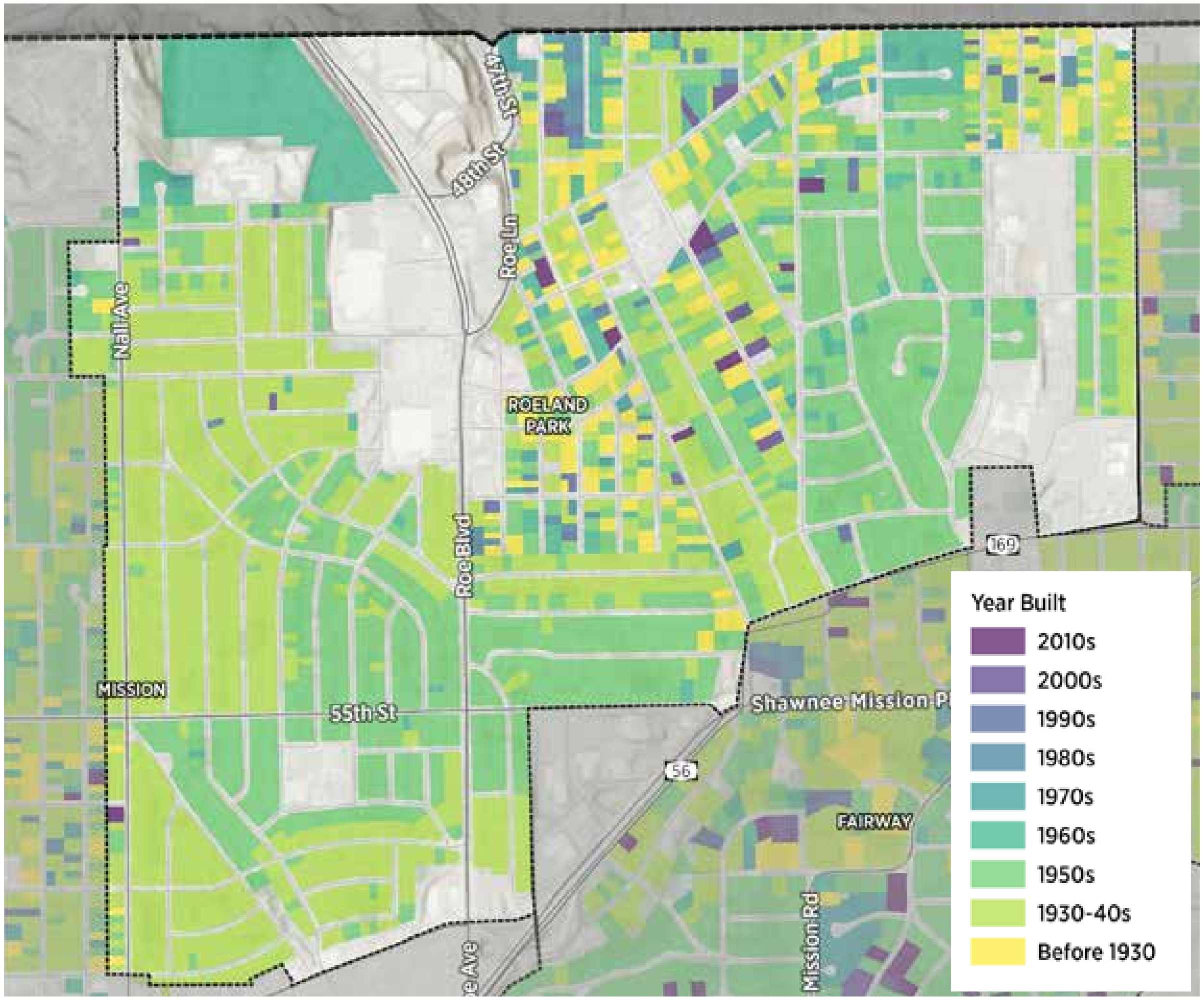
- Survey Respondent

MAP 5.5: RESIDENTIAL NEW CONSTRUCTION PERMITS BY LOCATION (2010-2019), ROELAND PARK



Source: Johnson County GIS Department

MAP 5.6: YEAR BUILT, ROELAND PARK



Source: Johnson County GIS Department

AGE OF HOUSING

Map 5.6 shows the year built of residential dwellings. The age of housing provides preliminary insight into areas more susceptible to deterioration and additional homeowner costs. If these areas are also occupied by lower income or elderly households then monitoring of rehabilitation needs is even more important.

- Roeland Park has an established housing stock with about 86% built before 1970.
- Conversely, less than 5% of homes came on the market since 2000.

"There is almost no dilapidated housing in Roeland Park"

- Survey Respondent

HOME SALES

How quickly homes sell in a market is a leading indicator of housing demand and supply. **Figure 5.17** shows home sales data from 2017-2019. In Roeland Park, similar to other areas in the county:

- Sales prices are increasing each year by more than inflation.
- The housing market in 2018 saw an increase in the number of units sold and days on market. However, this rate returned to 2017 levels the following year to one of the lowest levels in the county.

"I would love to rent another unit in Roeland Park, but can't afford to do so on my own. I would consider buying in Roeland Park, but there is nothing available under $200k, which is out of my price range at the moment. I've seriously considered buying or renting multiple properties in KCK for that reason."

- Survey Respondent

FIGURE 5.17: SINGLE FAMILY HOME SALES, ROELAND PARK

Source: Multiple Listings Service (2017-2019)

HOUSEHOLD INCOME AND COST BURDEN

Figure 5.18 shows that median household income is around $70,514, just below average in the county. However, since 2010 median incomes grew by about 22%, four times that of the increase in home values, but less than the rise in median rent.

According to the U.S. Government, households spending more than 30% of their income on housing are considered cost-burdened. Additionally, a healthy, self-sustaining housing market will have a value to income ratio between 2 and 3. Roeland Park has a value to income ratio of 2.33 indicating a homeownership market that is not overly burdensome for many residents.

- Only about 17% of homeowners pay more than 30% of their income for homeownership.

Renters appear to be more disproportionately affected by affordability. About 36% of renters pay more than 30% of their income on gross rent. The percentage has substantially rose since 2000 while the level of burden on home ownership decreased.

- Roeland Park does not have an overly high median contract rent compared to other cities. However, rents could still be inflated if the units are low quality.
- Low rental supply, and thus a competitive market, often results in higher rental prices. Adding units to the market could create market pressures on older units to adjust rates down.

VALUE TO INCOME RATIO: 2018

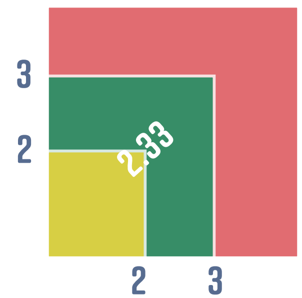


FIGURE 5.18: MEDIAN HOUSEHOLD INCOME COMPARISON

2018 MEDIAN INCOME RANGE	CITY	2010-2018 MEDIAN INCOME PERCENT CHANGE RANGE	CITY
<$60,000	• DE SOTO • EDGERTON • MERRIAM	<10%	• DE SOTO • EDGERTON • FAIRWAY • LAKE QUIVIRA • MISSION WOODS • SPRING HILLS
$60,000 - $80,000	• MISSION • GARDNER • ROELAND PARK • SPRING HILLS	10% - 15%	• LEAWOOD • LENEXA • MISSION HILLS • OLATHE • PRAIRIE VILLAGE • WESTWOOD
$80,000 - $100,000	• LENEXA • OLATHE • OVERLAND PARK • PRAIRIE VILLAGE • SHAWNEE • WESTWOOD • JOHNSON COUNTY	15% - 20%	• JOHNSON COUNTY • GARDNER • MERRIAM • OVERLAND PARK • SHAWNEE
>$100,000	• FAIRWAY • LAKE QUIVIRA • LEAWOOD • MISSION HILLS • MISSION WOODS • WESTWOOD HILLS	>20%	• MISSION • ROELAND PARK • WESTWOOD HILLS

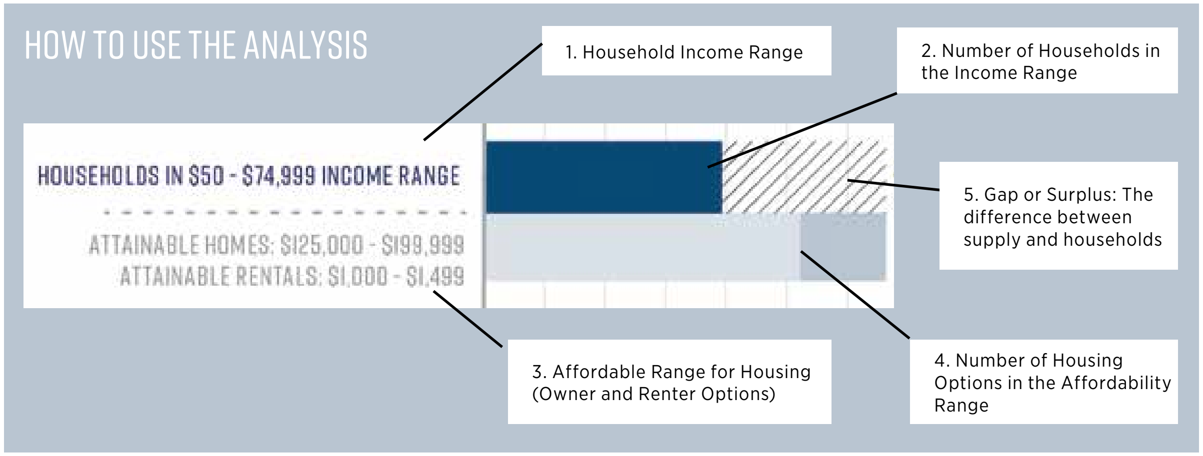
Source: American Community Survey (2018 5-year Estimates)

HOUSING ATTAINABILITY AND SUPPLY ANALYSIS

By comparing the distribution of household incomes with housing costs, a picture of supply and demand emerges across all of Roeland Park's housing market. **Figure 5.19** examines supply and demand through the lens of what is "affordable" to different income groups to answer the question: is there an adequate supply of housing options available for residents of different income groups?

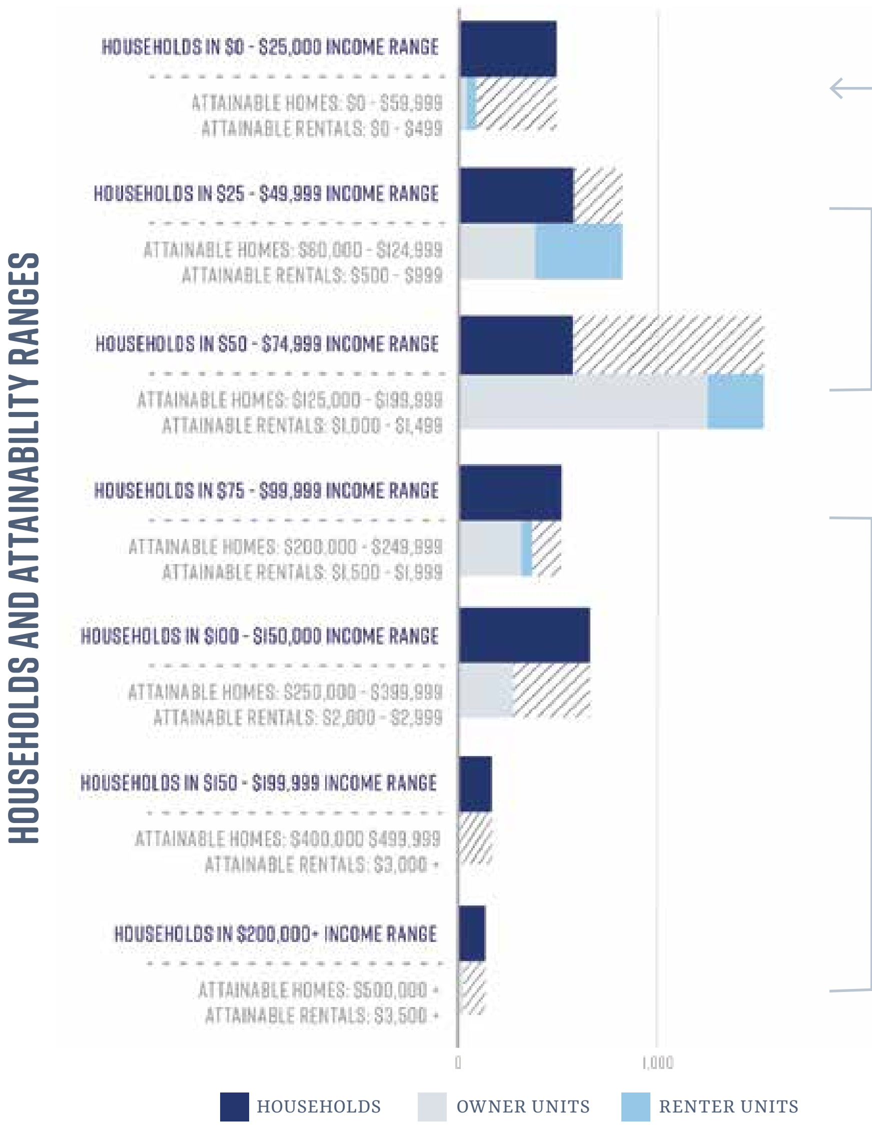
Figure 5.19 illustrates five major components in pursuit of the above story:

1. **Income Ranges.** The starting point of the analysis is the spectrum of incomes across all residents of Roeland Park. From these incomes, corresponding "affordable" housing prices are established for ownership and rental opportunities.
2. **Number of Households in Each Income Range.** The number of households in each income range is the demand; these residents seek housing options in Roeland Park that are affordable to them.
3. **Affordability Ranges.** An affordable ownership home is calculated at 2-3 times the household income depending on the income range. Lower income households tend to spend a higher percentage of their income on housing and higher income households tend to spend a lower percentage of their total income on housing. An affordable rental would be about 20% of household income.
4. **Number of Housing Units in Each Affordability Range.** The number of housing units in each affordability range is the supply of affordable options.
    - Composition of Housing Supply. This illustrates the share of the supply met by ownership and renter housing options.
5. **The Balance of Supply and Demand.**
    - If the number of households exceeds the number of units available, those households must seek options in different affordability ranges.
    - If the number of units exceeds the number of households, it indicates that the units are occupied by households in different income ranges.
    - **This analysis is meant to illustrate larger trends in how existing units are being occupied. It does not demonstrate exact market demand in certain price ranges.**



The analysis in **Figure 5.19** is based on all the households today that are occupying a unit. No household is without a unit.

FIGURE 5.19: HOUSING ATTAINABILITY,ROELAND PARK (2018)



Source: American Community Survey (2018 5-year Estimates); RDG Planning & Design

There are many units that would be attainable for households making between $25,000 and $75,000. These units should be maintained as attainable options for many households in the future.

- Many making under $25,000 are retired households on fixed incomes who have their homes paid off. Therefore, the affordability gap is not as severe as indicated. For example:
  - 24% of all owner-occupied households in Shawnee are over the age of 65.
  - The median household income for households over 65 is estimated at about $50,000, meaning that 50% of those households make less than $50,000.
  - Additionally, 63% of owner-occupied households over the age of 65 do not have a mortgage.

- There are many units that would be attainable for households making between $25,000 and $75,000. This price point reflects some of the older housing stock in Roeland Park. These units should be maintained as attainable options for many households in the future. However, many of the units in this range see competition from both lower income and upper income brackets.

- There are limited options that could be attainable for households in higher income ranges making more than $75,000. Most housing for these income ranges will be in the form of owner-occupied housing.
  - This indicates that many homeowners could afford a home at a higher cost but reside in a lower price point home.
  - About 550 households making over $100,000 a year are living in owner-occupied units priced below $250,000.
  - They do this for a variety of reasons, including housing cost and neighborhood preferences in addition to a lack of other options above this price range.

COMMUNITY PERCEPTIONS

A total of 112 residents completed the community survey. Key themes from the survey results were:

- The majority of respondents felt there was a lack of housing available for people with physical and/or mental disability, workers making less than $16 an hour, and households needing proximity to transit services in both Roeland Park and Johnson County as a whole.
- Most respondents were not looking to change housing in the next years, but those that were primarily were looking to move to a new community for quality of life reasons, move to a unit that allows aging in place, or to up-size to a larger owner-occupied house.
- None of the programs proposed to reduce housing costs received majority support. However, 38% of respondents supported housing rehabilitation loans.

LISTENING SESSIONS

Many people familiar with the housing market specific to Roeland Park participated in small group discussions. These included representatives from the City Council, Planning Commission, staff, and real estate agents, among others.

COMMON COMMENTS

Aside from common themes in Chapter 2 that pertain to the entire county, several common themes are apparent to Roeland Park.

- Roeland Park is now starting to see the demolition and rebuild of attainable housing, like in Prairie Village.
- There may be more seniors moving out of the community to find better options. As a result, many ideas for universal design and aging in place are city priorities.
- There are opportunities to update codes to support any type of multi-family housing to better align with the comprehensive plan. People are open to new ideas to solve design issues.

Many express support for assistance to older residents to maintain their homes.

HOUSING DEMAND

The housing demand analysis builds on the population projections, housing trends, and community conversations to forecast the demand for additional housing. The model is built on the following assumptions with a 0.03% growth rate:

- The proportion of the household population (those living in households and not in skilled nursing or prisons) will remain stable through 2030.
- Average people per household is expected to slightly increase over the next decade. Some growth may occur as Millennials move into their childbearing years, but Baby Boomer households will also continue to shrink.
- Unit demand at the end of the period is calculated by dividing household population by the number of people per household. This equals the number of occupied housing units.
- A manageable housing vacancy provides housing choices for residents moving to the community. Roeland Park's rate remains stable.
- Unit needs at the end of each period are based on the actual household demand plus the number of projected vacant units.
- Replacement need is the number of housing units demolished or converted to other uses. Homes in poor condition or obsolete should be gradually replaced in a city’s housing supply. The number of units lost annually is based on historic demolition rates.
- Cumulative need shows the number of total units needed between the base year of 2020 and the year indicated at the end of the period.

Figure 5.20 shows an average annual construction need of around 1-2 units, equal to the average annual construction rate from 2009 to 2019. The rate hinges on some population growth coming from existing single person household turnover to larger households.

DEVELOPMENT PROGRAM

Building on the housing demand model, the development program forecasts production targets for owner and renter-occupied units based on the following assumptions:

- Owner-occupied units will be distributed roughly in proportion to the income distributions of the households for whom owner occupancy is an appropriate strategy.
- Most low-income residents will be accommodated in rental units.
- Over the next ten years, production levels illustrated in **Figure 5.21** targets a split of 70% owner- and 30% renter-occupied units. This is similar to past trends.
- Approximately six additional owner-occupied units should be priced below $250,000. This demand will come through the city's existing housing stock being freed up through move-up housing, or products that do not fit the traditional detached single-family homes.

FIGURE 5.20: HOUSING DEMAND MODEL, ROELAND PARK

	2020	2025	2030	TOTAL
POPULATION AT END OF PERIOD	6,804	6,825	6,845	
HOUSEHOLD POPULATION AT END OF PERIOD	6,804	6,825	6,845	
AVERAGE PEOPLE PER HOUSEHOLD	2.20	2.21	2.21	
HOUSEHOLD DEMAND AT END OF PERIOD	3,093	3,095	3,097	
PROJECTED VACANCY RATE	6.5%	6.5%	6.5%	
UNIT NEEDS AT END OF PERIOD	3,308	3,310	3,313	
REPLACEMENT NEED (TOTAL LOST UNITS)		5	5	10
CUMULATIVE NEED DURING PERIOD		7-8	7-8	14-18
AVERAGE ANNUAL CONSTRUCTION		1-2	1-2	1-2

Source: RDG Planning & Design

FIGURE 5.21: HOUSING DEVELOPMENT PROGRAM, ROELAND PARK

	2025		2030		2020-2030	
TOTAL OWNER OCCUPIED						
ATTAINABLE: <$200,000	2	5	2	5	4	10
MODERATE MARKET: $200-250,000	1		1		2	
MARKET: $250-350,000	1		1		3	
HIGH MARKET: OVER $350,000	1		1		1	
TOTAL RENTER OCCUPIED						
ATTAINABLE: LESS THAN $1,000	1-2	2-4	1-2	2-4	2-4	4-8
MARKET: $1,000+	1-2		1-2		2-4	
TOTAL NEED		7-9		7-9		14-18

Source: RDG Planning & Design

SPRING HILL

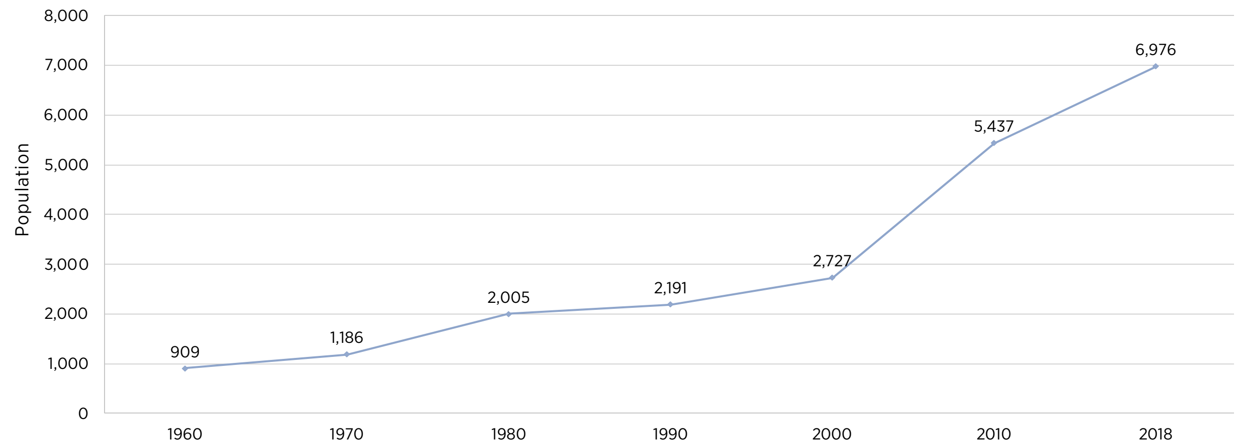
Spring Hill is a fast growing community in southwest Johnson County. Highway 169 bisects the city giving residents good access to the metro. Given its available vacant land, Spring Hill is one of the cities in Johnson County continuing to grow at a rapid rate.

POPULATION CHANGE

Figure 5.22 shows the historical population change since 1960. Spring Hill has been growing at a steady rate, with a large increase between 2000 and 2010 reflecting a 7% annual growth rate. Since 2010, the city has been growing at an annual rate of 5.4% and is likely to continue.

It is expected that Spring Hill will continue to grow at a rapid rate given the consistent housing construction experienced over the past ten years. MARC predicted a 1.97% growth rate, while a local plan estimated a 3.29% rate. The past ten years also saw a residential construction rate equivalent to a 3.05% annual growth rate. This study suggests a 3.05% is achievable in the next five years followed by a lower growth rate as the population grows through 2030, resulting in a growth of 2,896 new residents by 2030.

FIGURE 5.22: HISTORIC POPULATION CHANGE, SPRING HILL



Source: U.S. Census; Census Population Estimates Program

HOUSING OCCUPANCY

Figure 5.23 shows occupancy characteristics in Spring Hill.

- About 80% of housing units in Spring Hill are owner-occupied. The number of owner-occupied units increased slightly since 2000 by about 4%.
- Vacancy rates are quite low citywide, dropping from about 7 to just under 4% from 2000-2018. A healthy market vacancy rate is around 6%.
- Household size is around 3.01 people per household which is on the higher end of other cities in Johnson County. This translates into showing that Spring Hill is a desirable community for younger families.

FIGURE 5.23: HOUSING OCCUPANCY, SPRING HILL

	2000		2018 5YR		CHANGE 2000-2018
	NUMBER	% OF OCCUPIED UNITS	NUMBER	% OF OCCUPIED UNITS	
OWNER-OCCUPIED	1,473	76.8%	1,682	80.7%	209
RENTER-OCCUPIED	446	23.2%	402	19.3%	-44
TOTAL VACANT	150		78		-72
VACANCY RATE	7.2%		3.6%		
TOTAL UNITS	2,069		2,162		93

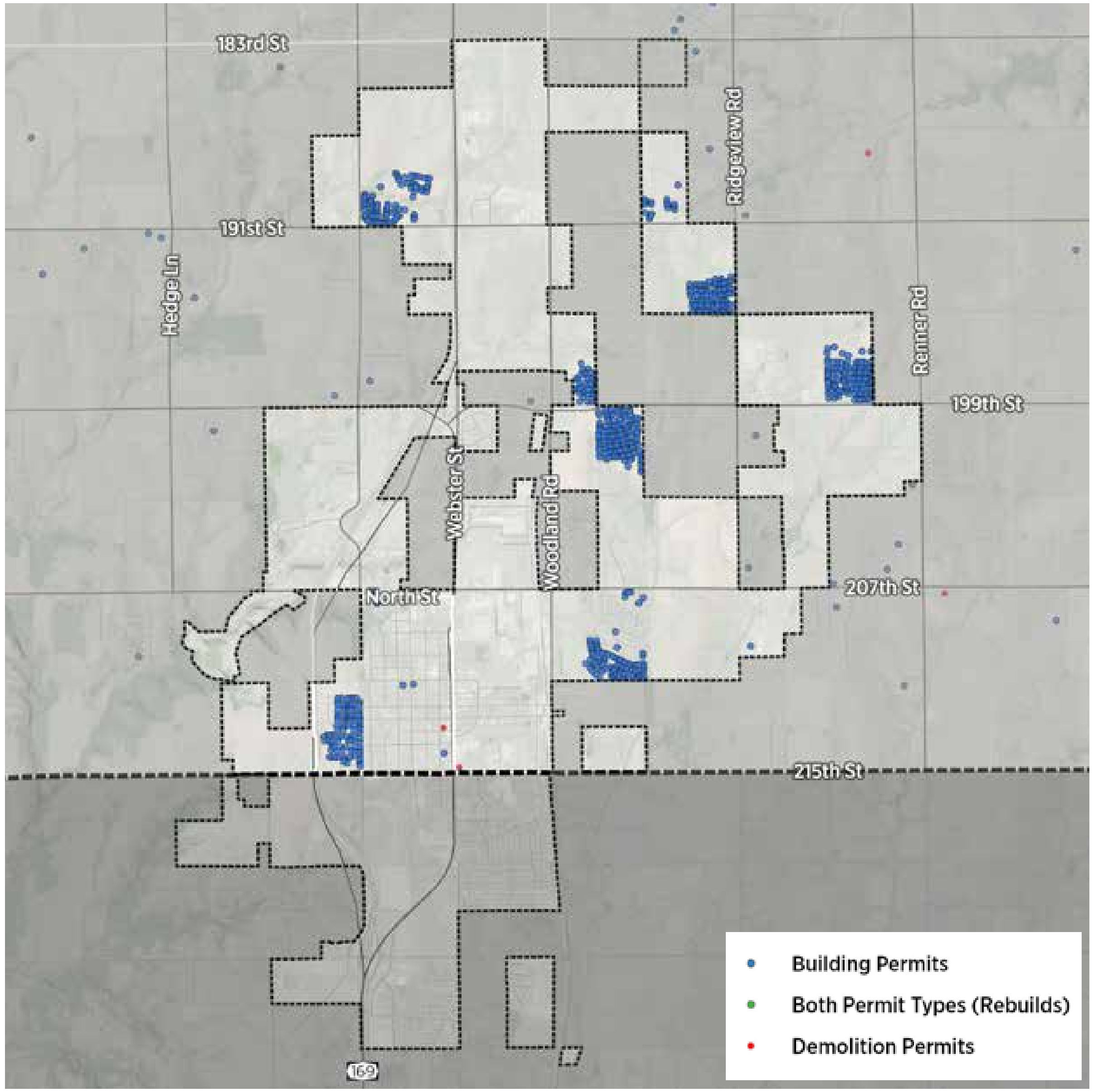
Source: U.S. Census; American Community Survey (2018 5-year Estimates)

CONSTRUCTION ACTIVITY

The opportunities for new construction in Spring Hill are ample. The past ten years shows a steady construction of dwellings. **Map 5.7** shows the location of permits within Johnson County. Note, permit data for the portion of Spring Hill in Miami County was not available. There is also significant building activity in Miami County, including recent developments like the Black Hawk Apartments and duplex developments.

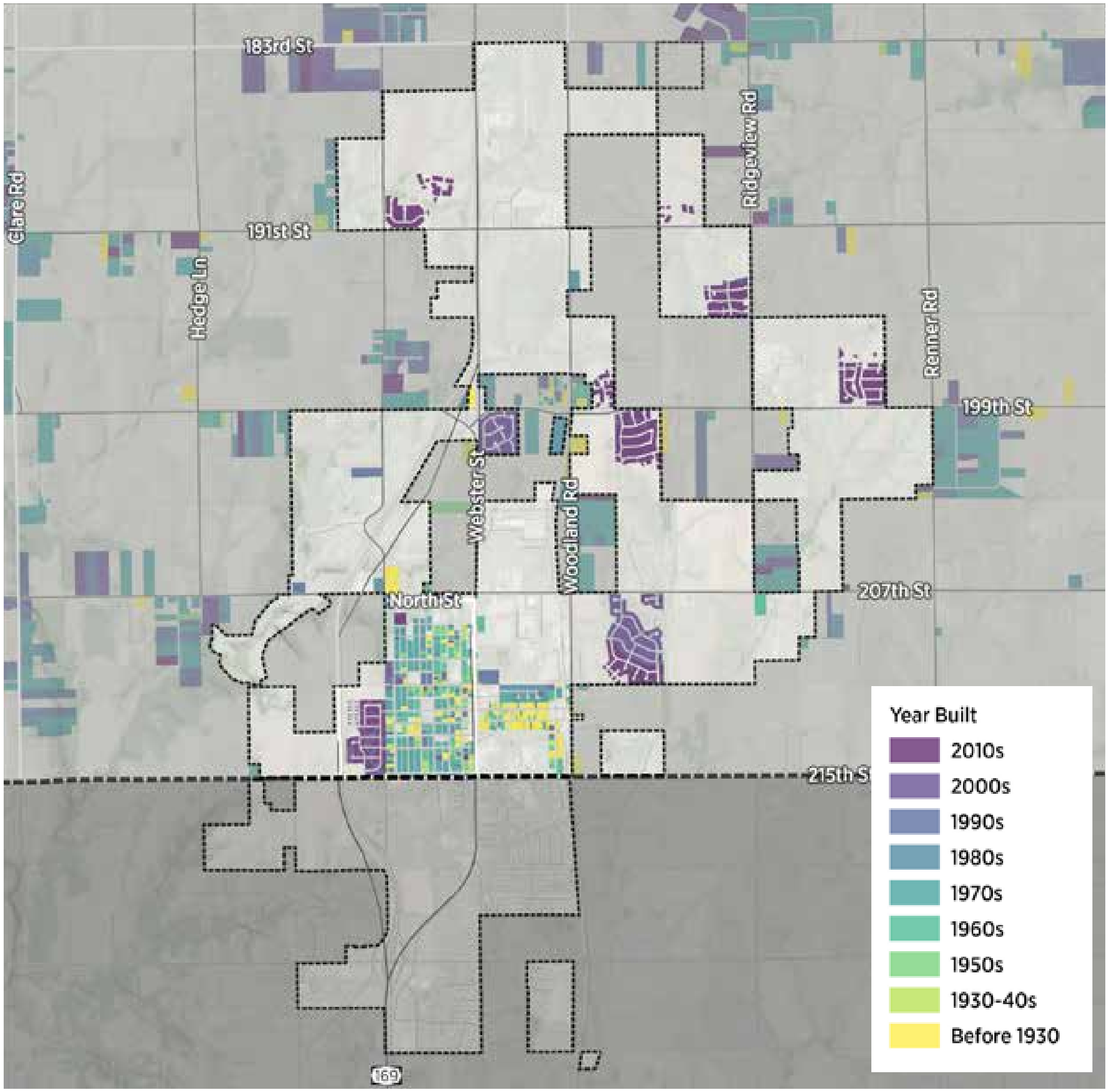
- Almost all new units were single-family dwellings. The annual permits averaged about 66 per year in Johnson County since 2010.
- Only eight new units in Johnson County were multi-family units, which include apartments, townhomes, and any structure with more than two units. However, there were 100+ apartments built in the portion of Spring Hill in Miami County.
- Only two demolitions have occurred since 2010. Demolitions at this rate are not concerning for a city with a newer housing stock like Spring Hill.

MAP 5.7: RESIDENTIAL NEW CONSTRUCTION PERMITS BY LOCATION (2010-2019), SPRING HILL



Source: Johnson County GIS Department

MAP 5.8: YEAR BUILT, SPRING HILL



Source: Johnson County GIS Department

YEAR BUILT

Map 5.8 shows the year built of residential dwellings. The age of housing provides preliminary insight into areas more susceptible to deterioration and additional homeowner costs. If these areas are also occupied by lower income households then monitoring of rehabilitation needs is even more important.

- Spring Hill in Johnson County has a relatively new housing stock with 45% constructed between 2000 and 2009.
- Conversely, there is an old town core where about 31% of homes came onto the market before 1970.

"I see very little dilapidated housing in rural JoCo./Spring Hill area."

- Survey Respondent

HOME SALES

How quickly homes sell in a market is a leading indicator of housing demand and supply. **Figure 5.24** shows home sales data from 2017-2019. In Spring Hill, similar to other areas in the county:

- Average sales price continued to rise along with the number of units sold in line with surrounding communities and new construction activity.
- Average days on market are actually going up significantly, unlike most other communities which have seen a drop in days on market resulting from a highly competitive housing market. This is a result of many new homes coming online which may not sell quickly until the subdivision is fully built out.

FIGURE 5.24: SINGLE FAMILY HOME SALES, SPRING HILL

Source: Multiple Listings Service (2017-2019)

HOUSEHOLD INCOME AND COST BURDEN

Figure 5.25 shows the median household income is around $72,384, which is in the lower tier for the county. Since 2010 median incomes grew about 10%, also in the lower tier for income growth in Johnson County.

According to the U.S. Government, households spending more than 30% of their income on housing are considered cost-burdened. Additionally, a healthy, self-sustaining housing market will have a value to income ratio between 2 and 3. Spring Hill has a value to income ratio of 2.61 indicating a homeownership market that is not overly burdensome for many residents.

- Only about 22% of homeowners pay more than 30% of their income for homeownership.

However, renters appear to be more disproportionately affected by affordability.

- About 51% of renters pay more than 30% of their income on rent. Despite the cost-burden on many renters, Spring Hill median contract rent is the lowest in Johnson County at $634. This rose 20% since 2010 while incomes only rose 10% during the same time.
- Low rental supply, and thus a competitive market, often results in higher rental prices. Adding units to the market should create market pressures on older units to adjust rates down. This does not appear to be happening yet in Spring Hill which only saw 8 new multi-family units constructed since 2010.

VALUE TO INCOME RATIO: 2018

FIGURE 5.25: MEDIAN HOUSEHOLD INCOME COMPARISON

2018 MEDIAN INCOME RANGE	CITY	2010-2018 MEDIAN INCOME PERCENT CHANGE RANGE	CITY
<$60,000	• DE SOTO • EDGERTON • MERRIAM	<10%	• DE SOTO • EDGERTON • FAIRWAY • LAKE QUIVIRA • MISSION WOODS • SPRING HILLS
$60,000 - $80,000	• MISSION • GARDNER • ROELAND PARK • SPRING HILLS	10% - 15%	• LEAWOOD • LENEXA • MISSION HILLS • OLATHE • PRAIRIE VILLAGE • WESTWOOD
$80,000 - $100,000	• LENEXA • OLATHE • OVERLAND PARK • PRAIRIE VILLAGE • SHAWNEE • WESTWOOD • JOHNSON COUNTY	15% - 20%	• JOHNSON COUNTY • GARDNER • MERRIAM • OVERLAND PARK • SHAWNEE
>$100,000	• FAIRWAY • LAKE QUIVIRA • LEAWOOD • MISSION HILLS • MISSION WOODS • WESTWOOD HILLS	>20%	• MISSION • ROELAND PARK • WESTWOOD HILLS

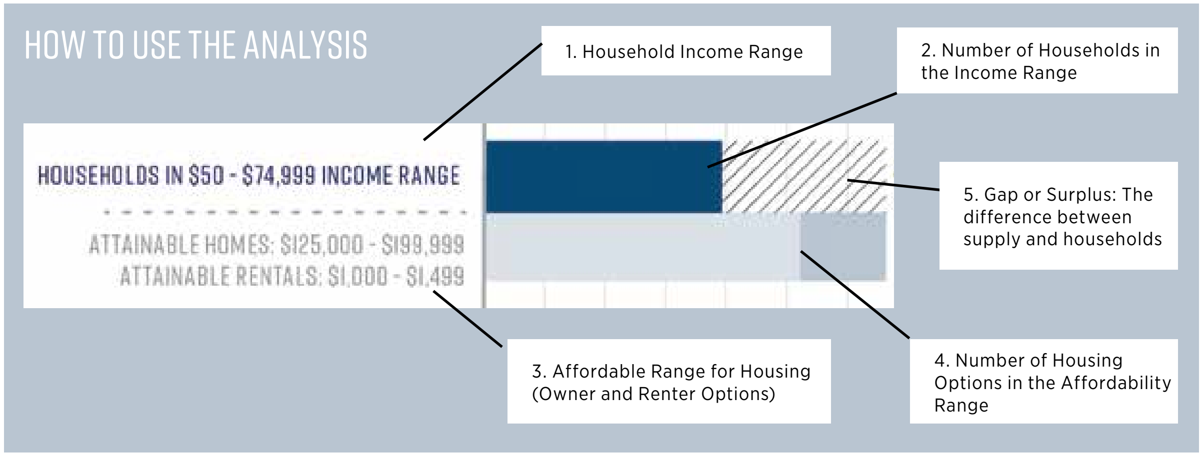
Source: American Community Survey (2018 5-year Estimates)

HOUSING ATTAINABILITY AND SUPPLY ANALYSIS

By comparing the distribution of household incomes with housing costs, a picture of supply and demand emerges across all of Spring Hill's housing market. **Figure 5.26** examines supply and demand through the lens of what is "affordable" to different income groups to answer the question: is there an adequate supply of housing options available for residents of different income groups?

Figure 5.26 illustrates five major components in pursuit of the above story:

1. **Income Ranges.** The starting point of the analysis is the spectrum of incomes across all residents of Spring Hill. From these incomes, corresponding "affordable" housing prices are established for ownership and rental opportunities.
2. **Number of Households in Each Income Range.** The number of households in each income range is the demand; these residents seek housing options in Spring Hill that are affordable to them.
3. **Affordability Ranges.** An affordable ownership home is calculated at 2-3 times the household income depending on the income range. Lower income households tend to spend a higher percentage of their income on housing and higher income households tend to spend a lower percentage of their total income on housing. An affordable rental would be about 20% of household income.
4. **Number of Housing Units in Each Affordability Range.** The number of housing units in each affordability range is the supply of affordable options.
   - Composition of Housing Supply. This illustrates the share of the supply met by ownership and renter housing options.
5. **The Balance of Supply and Demand.**
   - If the number of households exceeds the number of units available, those households must seek options in different affordability ranges.
   - If the number of units exceeds the number of households, it indicates that the units are occupied by households in different income ranges.
   - **This analysis is meant to illustrate larger trends in how existing units are being occupied. It does not demonstrate exact market demand in certain price ranges.**



The analysis in **Figure 5.26** is based on all the households today that are occupying a unit. No household is without a unit.

FIGURE 5.26: HOUSING ATTAINABILITY, SPRING HILL (2018)

Source: American Community Survey (2018 5-year Estimates); RDG Planning & Design

Spring Hill has a supply of units available for household's making between $50,000 and $75,000. The supply at this price point reflects the types of units being built in bulk in recent years, without much variety in housing type or price point.

- There are more households than affordable options for those making under $25,000. These households must resort to more expensive housing options and often must rent. However, some of the household in this income range a retirees with low incomes and paid off homes.

- Spring Hill has a supply of units available for household's making between $50,000 and $75,000. The supply at this price point reflects the types of units being built in bulk in recent years, without much variety in housing type or price point.
    - Without other options these units are filled by retirees and households making over $75,000 per year.

- There are limited options that could be attainable for households in higher income ranges making more than $100,000. Most housing for these income ranges will be in the form of owner-occupied housing.
    - The gap indicates that new homes priced above $250,000 and rentals above $2,000 a month could be viable options in Spring Hill to potentially free up homes currently being occupied by owners with greater purchasing capacity.

COMMUNITY PERCEPTIONS

A total of 60 residents completed the community survey. This sample size is small, but themes from the survey results were:

- Most people feel there is an adequate supply of buildable lots in the city.
- The housing type respondents feel would be the most successful are mid-size, three-bedroom houses (98%) and small two- or three-bedroom houses (86%).
- Respondents were least confident in mixed-income housing near transit stations and cottage courts. Likely because these products are not available in Spring Hill today and unfamiliar.

LISTENING SESSIONS

Many people familiar with the housing market specific to Spring Hill participated in small group discussions. These included representatives from the City Council, Planning Commission, staff, and real estate agents, among others.

COMMON COMMENTS

Aside from common themes in Chapter 2 that pertain to the entire county, several common themes are apparent to Spring Hill.

- The community is starting to see more opposition to development. There is an opportunity to expose residents to the benefits of different housing before areas become limited. For example, townhomes are slow to be accepted in the community as a new housing product but could offer good owner and rental options.
- Manufacturers have had to increase their starting wages to attract people and sometimes offer starting bonuses. Many employees cannot live in the community because the cost of living and local wages are not aligned.
- The school districts are desirable, and some families are living together within one home to stay in the district.
- Spring Hill is growing fast but still a small community without as many resources. New non-residential developments will only increase the residential growth potential.
- There are high infrastructure costs reported by the city.

HOUSING DEMAND

The housing demand analysis builds on the population projections, housing trends, and community conversations to forecast the demand for additional housing. The model is built on the following assumptions with a growth rate of 3.05% through 2025 and dropping to 2.77% from 2025 to 2030 as the population grows.

- The proportion of the household population (those living in households and not in skilled nursing or prisons) will remain stable through 2030.
- Average people per household is expected to decline slightly over the next decade with the demand for more multi-family options.
- Unit demand at the end of the period is calculated by dividing household population by the number of people per household. This equals the number of occupied housing units.
- A manageable housing vacancy provides housing choices for residents moving to the community. As noted earlier, the 2018 estimated rate is low and should increase to a more healthy level as high construction rates continue.
- Unit needs at the end of each period are based on the actual household demand and projected vacant units.
- Replacement need is the number of housing units demolished or converted to other uses. Homes in poor condition or obsolete from damage should be gradually replaced in a city's housing supply. The number of units lost annually is based on historic demolition rates.
- Cumulative need shows the number of total units needed between the base year of 2020 and the year indicated at the end of the period.

Figure 5.27 shows an average annual construction need of 106 units. The average annual construction rate from 2010 to 2017 was 62 units but trending upward over 100 units in recent years. A high was 152 in 2017 and a low was 24 in 2011.

- Note, the average is lower than construction activity in recent years. However, some years will have many more units, and some could have less. For example, a large apartment complex will significantly increase units produced in one given year.

DEVELOPMENT PROGRAM

Building on the housing demand model, the development program forecasts production targets for owner and renter-occupied units based on the following assumptions:

- Owner-occupied units will be distributed roughly in proportion to the income distributions of the households for whom owner occupancy is an appropriate strategy.
- Most low-income residents will be accommodated in rental units.
- Over the next ten years, production levels need to balance to provide the housing variety necessary for a growing population. Therefore, the model illustrated in **Figure 5.28** targets a split of 65% owner- and 35% renter-occupied units. There has been limited multi-family construction recently and the market will need to catch up with demand.
- Approximately 431 additional owner-occupied units should be priced below $250,000. This demand will come through the city's existing housing stock being freed up through move-up housing, or products that do not fit the traditional detached single-family homes.
- Nearly 140 rental units will need to be produced with rents below $1,000 per month. These units will tend to be one-bedroom models or funding through programs like low-income housing tax credits.

FIGURE 5.27: HOUSING DEMAND MODEL, SPRING HILL

	2020	2025	2030	TOTAL
POPULATION AT END OF PERIOD	7,409	8,611	9,872	
HOUSEHOLD POPULATION AT END OF PERIOD	7,409	8,611	9,872	
AVERAGE PEOPLE PER HOUSEHOLD	3.00	2.95	2.90	
HOUSEHOLD DEMAND AT END OF PERIOD	2,470	2,919	3,404	
PROJECTED VACANCY RATE	4.0%	5.0%	6.0%	
UNIT NEEDS AT END OF PERIOD	2,572	3,073	3,621	
REPLACEMENT NEED (TOTAL LOST UNITS)		5	5	10
CUMULATIVE NEED DURING PERIOD		505	554	1,059
AVERAGE ANNUAL CONSTRUCTION		101	111	106

Source: RDG Planning & Design

FIGURE 5.28: HOUSING DEVELOPMENT PROGRAM, SPRING HILL

	2025	Subtotal	2030	Subtotal	2020-2030	Subtotal
TOTAL OWNER OCCUPIED						
ATTAINABLE: <$200,000	145	328	159	360	303	688
MODERATE MARKET: $200-250,000	61		67		128	
MARKET: $250-350,000	87		96		183	
HIGH MARKET: OVER $350,000	35		39		74	
TOTAL RENTER OCCUPIED						
ATTAINABLE: LESS THAN $1,000	65	177	72	194	137	371
MARKET: $1,000-1,500	69		75		144	
HIGH MARKET: $1,500+	43		47		90	
TOTAL NEED		505		554		1,059

Source: RDG Planning & Design

DE SOTO

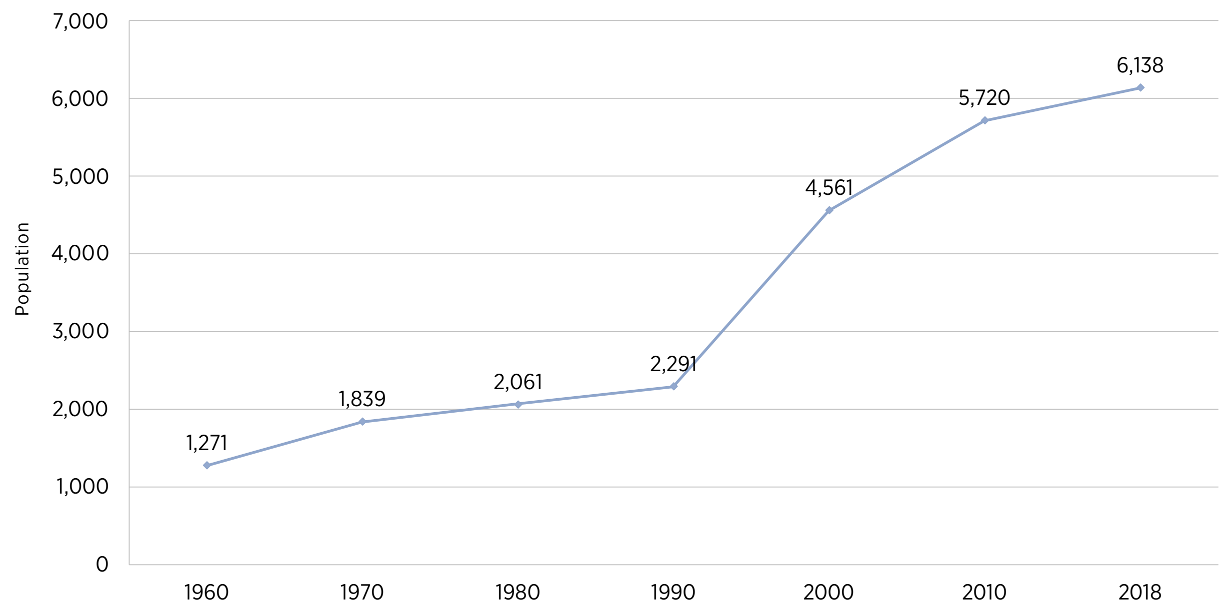
De Soto is located in eastern Johnson County, just south of the Kansas River and bisected by Highway 10. The previous trend in growth is dispersed low-density neighborhoods. A commercial node is present in the southwest portion of the community with primarily large chain businesses.

POPULATION CHANGE

Population in De Soto has been steady since 1960, as illustrated in **Figure 5.29**. While slow to start, since 1990 the annual growth rate has jumped significantly, slowing some since 2010.

Despite slower growth in the past decade, most sources estimate a growth rate returning closer to that seen between 2000 and 2010. MARC estimated a 1.89% growth rate, while a recent housing study in 2017 used several scenarios ranging from 1% to 2.9%. This study maintains the MARC growth rate at 1.89%. This would result in a 2030 population of 8,001 residents.

FIGURE 5.29: HISTORIC POPULATION CHANGE, DE SOTO



Source: U.S. Census; American Community Survey (2018 5-year Estimates)

HOUSING OCCUPANCY

Figure 5.30 shows occupancy characteristics in De Soto.

- The number of renters increased slightly since 2000.
- Vacancy rates are quite stable since 2010 at about 8%, but have increased from about 5% in 2000. A healthy market vacancy rate is around 6%.
- Household size is around 2.54 people per household which is about average compared to other cities in Johnson County.

FIGURE 5.30: HOUSING OCCUPANCY, DE SOTO

	2000		2018 5YR		CHANGE 2000-2018
	NUMBER	% OF OCCUPIED UNITS	NUMBER	% OF OCCUPIED UNITS	
OWNER-OCCUPIED	1,078	65.7%	1,495	62.3%	417
RENTER-OCCUPIED	564	34.3%	904	37.7%	340
TOTAL VACANT	88		222		134
VACANCY RATE	5.1%		8.5%		
TOTAL UNITS	1,730		2,621		891

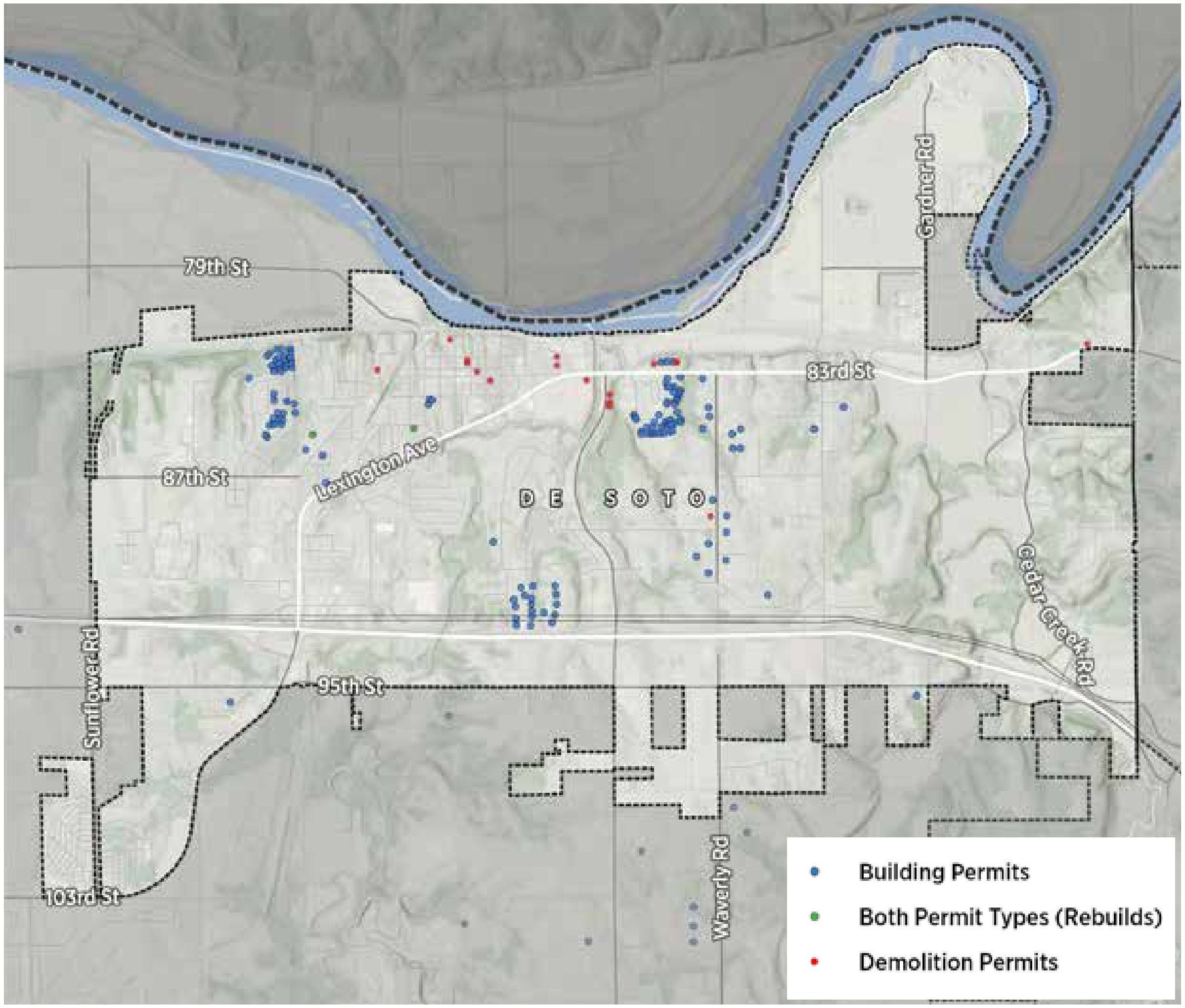
Source: U.S. Census; American Community Survey (2018 5-year Estimates)

CONSTRUCTION ACTIVITY

The opportunities for new construction in De Soto are ample. The past ten years show a steady construction of dwellings, but also a steady rate of demolitions. **Map 5.9** shows the location of permits. Between 2010 and 2019:

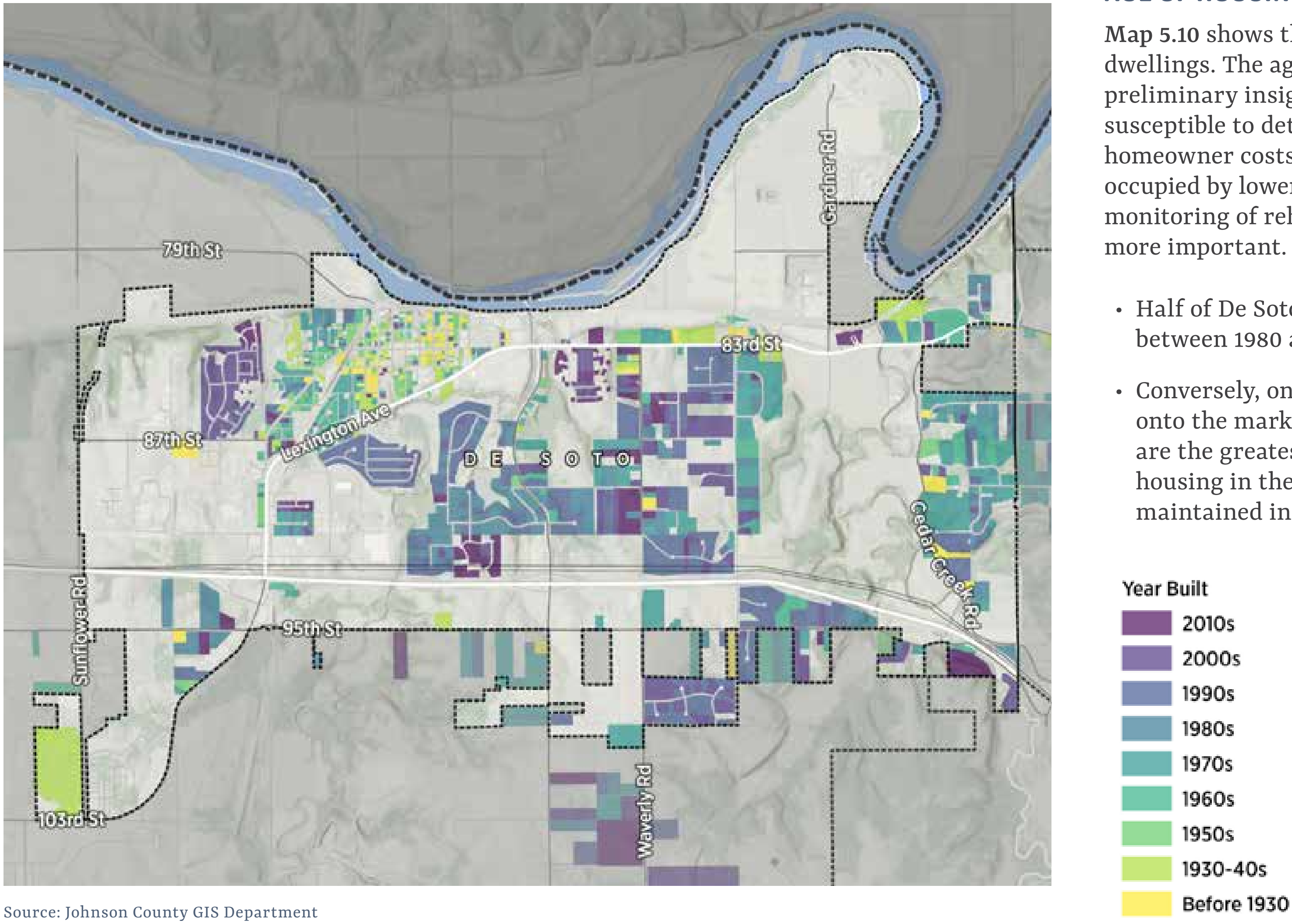
- About 47% of new units were single-family dwellings or duplexes. The annual permits were around 15 per year.
- About 53% of new units were multi-family units which include apartments, townhomes, and any structure with more than two units.
- Numerous demolitions occurred each year at an average of 3 annually. Demolitions at this rate are not concerning for a city with some older housing units like De Soto. However, ideally these lots do not remain vacant after demolition and in the future transition to more rehabilitation over demolition.

MAP 5.9: RESIDENTIAL NEW CONSTRUCTION PERMITS BY LOCATION (2010-2019), DE SOTO



Source: Johnson County GIS Department

MAP 5.10: YEAR BUILT, DE SOTO



Source: Johnson County GIS Department

AGE OF HOUSING

Map 5.10 shows the year built of residential dwellings. The age of housing provides preliminary insight into areas more susceptible to deterioration and additional homeowner costs. If these areas are also occupied by lower income households then monitoring of rehabilitation needs is even more important.

- Half of De Soto's housing stock was built between 1980 and 2009.
- Conversely, only about 44% of homes came onto the market before 1980. These homes are the greatest supply of attainable housing in the community and should be maintained in good condition.

HOUSEHOLD INCOME AND COST BURDEN

Figure 5.31 shows the median household income is the lowest in Johnson County at $52,364, which actually declined by 15% since 2010 according to Census estimates (likely a result of the large margin of error reported by the Census). This drop in income was accompanied by a decline in median home values but a rise in median rents.

According to the U.S. Government, households spending more than 30% of their income on housing are considered cost-burdened. Additionally, a healthy, self-sustaining housing market will have a value to income ratio between 2 and 3. De Soto has a value to income ratio of 3.88 indicating a homeownership market that is a burdensome for some residents.

- The V/I ratio is high even compared to other cities in Johnson County and may be a result of high margin of errors from the Census.
- About 17% of homeowners pay more than 30% of their income for homeownership.

Renters appear to be more disproportionately affected by affordability.

- Rents are increasing at a higher rate than incomes.
- About 51% of renters pay more than 30% of their income on contract rent. The percentage has risen since 2000 while the level of burden on home ownership decreased.
- De Soto has the second lowest median rent in Johnson County. However, rents could still be inflated if the units are low quality.

VALUE TO INCOME RATIO: 2018

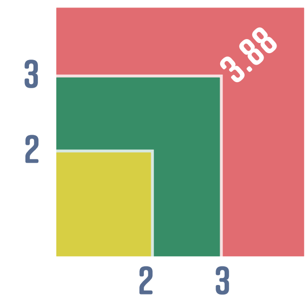


FIGURE 5.31: MEDIAN HOUSEHOLD INCOME COMPARISON

2018 MEDIAN INCOME RANGE	CITY	2010-2018 MEDIAN INCOME PERCENT CHANGE RANGE	CITY
<$60,000	• DE SOTO • EDGERTON • MERRIAM	<10%	• DE SOTO • EDGERTON • FAIRWAY • LAKE QUIVIRA • MISSION WOODS • SPRING HILLS
$60,000 - $80,000	• MISSION • GARDNER • ROELAND PARK • SPRING HILLS	10% - 15%	• LEAWOOD • LENEXA • MISSION HILLS • OLATHE • PRAIRIE VILLAGE • WESTWOOD
$80,000 - $100,000	• LENEXA • OLATHE • OVERLAND PARK • PRAIRIE VILLAGE • SHAWNEE • WESTWOOD • JOHNSON COUNTY	15% - 20%	• JOHNSON COUNTY • GARDNER • MERRIAM • OVERLAND PARK • SHAWNEE
>$100,000	• FAIRWAY • LAKE QUIVIRA • LEAWOOD • MISSION HILLS • MISSION WOODS • WESTWOOD HILLS	>20%	• MISSION • ROELAND PARK • WESTWOOD HILLS

Source: American Community Survey (2018 5-year Estimates)

HOME SALES

How quickly homes sell in a market is a leading indicator of housing demand and supply. **Figure 5.32** shows home sales data from 2017-2019. In De Soto, similar to other areas in the county:

- The average sales price is increasing faster than inflation, jumping a significant amount between 2018 and 2019.
- Average days on market have remained fairly stable but low overall, as have the number of housing units sold. Homes generally sell quickly.

"De Soto is a great place to live. It is much more diverse than most of Johnson County. Houses are increasing value so fast that I worry that others may not be able to move here."

- Survey Respondent

FIGURE 5.32: SINGLE FAMILY HOME SALES, DE SOTO

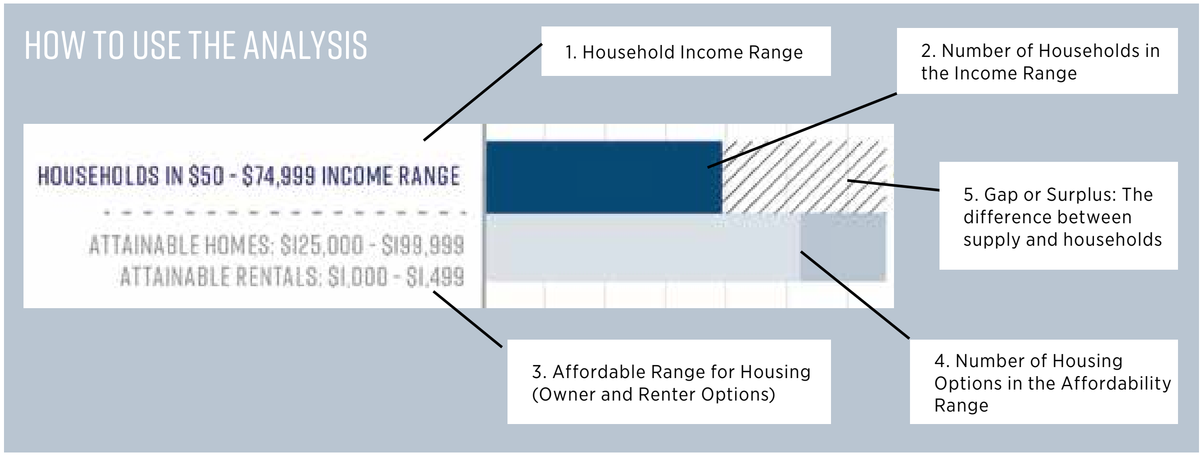
Source: Multiple Listings Service (2017-2019)

HOUSING ATTAINABILITY AND SUPPLY ANALYSIS

By comparing the distribution of household incomes with housing costs, a picture of supply and demand emerges across all of De Soto's housing market. **Figure 5.33** examines supply and demand through the lens of what is "affordable" to different income groups to answer the question: is there an adequate supply of housing options available for residents of different income groups?

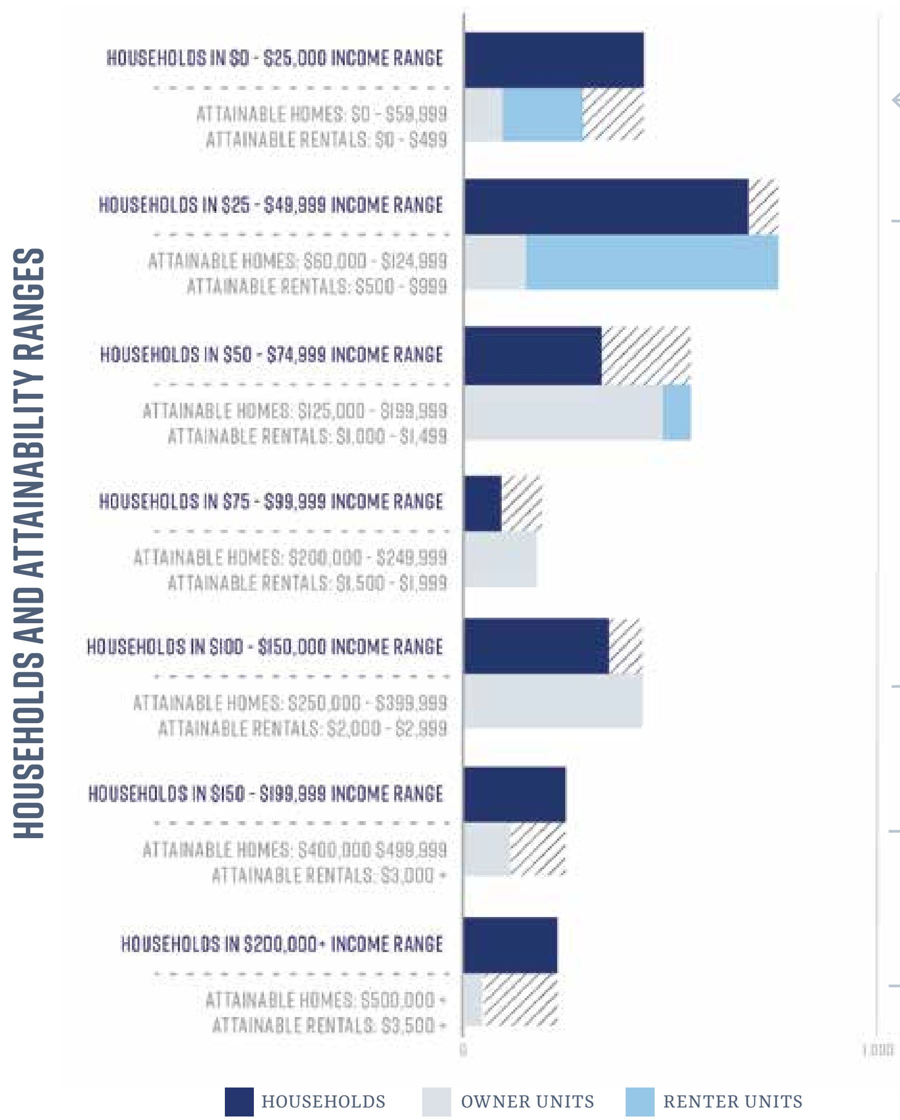
Figure 5.33 illustrates five major components in pursuit of the above story:

1. **Income Ranges.** The starting point of the analysis is the spectrum of incomes across all residents of De Soto. From these incomes, corresponding "affordable" housing prices are established for ownership and rental opportunities.
2. **Number of Households in Each Income Range.** The number of households in each income range is the demand; these residents seek housing options in De Soto that are affordable to them.
3. **Affordability Ranges.** An affordable ownership home is calculated at 2-3 times the household income depending on the income range. Lower income households tend to spend a higher percentage of their income on housing and higher income households tend to spend a lower percentage of their total income on housing. An affordable rental would be about 20% of household income.
4. **Number of Housing Units in Each Affordability Range.** The number of housing units in each affordability range is the supply of affordable options.
   - Composition of Housing Supply. This illustrates the share of the supply met by ownership and renter housing options.
5. **The Balance of Supply and Demand.**
   - If the number of households exceeds the number of units available, those households must seek options in different affordability ranges.
   - If the number of units exceeds the number of households, it indicates that the units are occupied by households in different income ranges.
   - **This analysis is meant to illustrate larger trends in how existing units are being occupied. It does not demonstrate exact market demand in certain price ranges.**



The analysis in **Figure 5.33** is based on all the households today that are occupying a unit. No household is without a unit.

FIGURE 5.33: HOUSING ATTAINABILITY,DE SOTO (2018)



Source: American Community Survey (2018 5-year Estimates); RDG Planning & Design

There is a need for workforce housing in De Soto. Many of the units in these income ranges see competition from both lower income and upper income brackets.

- There are more households than affordable options for those making under $25,000. These households must resort to more expensive housing options and often must rent. However, some of the household in this income range a retirees with low incomes and paid off homes.

- There is a moderate supply of units are available for household's making between $25,000 and $150,000. This reflects the older housing stock in De Soto. These units should be maintained as attainable options for many households in the future.
  - It should not be construed to indicate there is not a need for workforce housing at lower income ranges. Many of the units in this range see competition from both lower income and upper income brackets.
  - Additionally, most attainable options for households making $25,000 to $50,000 are rentals. This may suit many people, but those that want to buy have few options within an attainable price range.

- There are limited options that could be attainable for households in higher income ranges making more than $150,000. Housing for these income ranges will be in the form of built owner-occupied housing priced above $400,000. Many of these households now are living below their means in lower price point homes that are needed by others.
  - They do this for a variety of reasons, including housing cost and neighborhood preferences in addition to a lack of other options above this price range.

COMMUNITY PERCEPTIONS

A total of only 17 residents completed the community survey. This sample size is too small to discern meaningful trends or takeaways in resident perceptions. However, a housing assessment completed in 2019 provides several insights.

LISTENING SESSIONS

Many people familiar with the housing market specific to De Soto participated in small group discussions. These included representatives from the City Council, Planning Commission, staff, and real estate agents, among others.

COMMON COMMENTS

Aside from common themes in Chapter 2 that pertain to the entire county, several common themes are apparent to De Soto.

- About half of the land mass in De Soto is rural residential development. There will be continued pressure for development versus small town character in the future.
- There are more environmental barriers in De Soto than in other cities in Johnson County, including drainage.
- De Soto has attainable rental options that need rehabilitation help but offer an option for some today.
- There is some demonstrated smaller lot development in the core that could be a model for other areas.
- De Soto is far enough away from the metro that it can be hard to find contractors when there are so many projects closer to the metro.
- The completion of the fiber network will increase De Soto's appeal and the school district for many people in the future.

HOUSING DEMAND

The housing demand analysis builds on the population projections, housing trends, and community conversations to forecast the demand for additional housing. The model is built on the following assumptions with a 1.89% growth rate:

- The proportion of the household population (those living in households and not in skilled nursing or prisons) will remain stable through 2030.
- Average people per household is expected to slightly decline over the next decade with more multi-family options. Some growth may occur as Millennials move into their childbearing years, but Baby Boomer households will also continue to shrink.
- Unit demand at the end of the period is calculated by dividing household population by the number of people per household. This equals the number of occupied housing units.
- A manageable housing vacancy provides housing choices for residents moving to the community. As noted earlier, the rate should decline to a more healthy rate as the lowest quality units are fixed up or removed from the market.
- Unit needs at the end of each period are based on the actual household demand and projected vacant units.
- Replacement need is the number of housing units demolished or converted to other uses. Homes in poor condition or obsolete should be gradually replaced in a city’s housing supply. The number of units lost annually is based on historic demolition rates.
- Cumulative need shows the number of total units needed between the base year of 2020 and the year indicated at the end of the period.

Figure 5.34 shows an average annual construction need of 69 units. The average annual construction rate from 2010 to 2019 was 32 units.

DEVELOPMENT PROGRAM

Building on the housing demand model, the development program forecasts production targets for owner and renter-occupied units based on the following assumptions:

- Owner-occupied units will be distributed roughly in proportion to the income distributions of the households for whom owner occupancy is an appropriate strategy.
- Most low-income residents will be accommodated in rental units.
- Over the next ten years, production levels need to balance to provide the housing variety necessary for a growing population. Therefore, the model illustrated in **Figure 5.35** targets a split of 55% owner- and 45% renter-occupied units.
- Approximately 221 additional owner-occupied units should be priced below $250,000. This demand will come through the city's existing housing stock being freed up through move-up housing or products that do not fit the traditional detached single-family homes.
- Nearly 226 rental units will need to be produced with rents below $1,000 per month. These units will have to be generated through programs like low-income housing tax credits. Some could be feasible as one-bedroom units.

FIGURE 5.34: HOUSING DEMAND MODEL, DE SOTO

	2020	2025	2030	TOTAL
POPULATION AT END OF PERIOD	6,635	7,286	8,001	
HOUSEHOLD POPULATION AT END OF PERIOD	6,635	7,286	8,001	
AVERAGE PEOPLE PER HOUSEHOLD	2.54	2.52	2.49	
HOUSEHOLD DEMAND AT END OF PERIOD	2,612	2,897	3,213	
PROJECTED VACANCY RATE	8.5%	8.3%	8.0%	
UNIT NEEDS AT END OF PERIOD	2,855	3,158	3,493	
REPLACEMENT NEED (TOTAL LOST UNITS)		25	25	50
CUMULATIVE NEED DURING PERIOD		328	360	688
AVERAGE ANNUAL CONSTRUCTION		66	72	69

Source: RDG Planning & Design

FIGURE 5.35: HOUSING DEVELOPMENT PROGRAM, DE SOTO

	2025	2025 subtotal	2030	2030 subtotal	2020-2030	2020-2030 subtotal
TOTAL OWNER OCCUPIED						
ATTAINABLE: <$200,000	97	164	107	198	204	378
MODERATE MARKET: $200-250,000	8		9		17	
MARKET: $250-350,000	34		37		71	
HIGH MARKET: OVER $350,000	42		46		87	
TOTAL RENTER OCCUPIED						
ATTAINABLE: LESS THAN $1,000	108	147	118	162	226	310
MARKET: $1,000-1,500	32		35		67	
HIGH MARKET: $1,500+	8		9		17	
TOTAL NEED		328		360		688

Source: RDG Planning & Design

EDGERTON

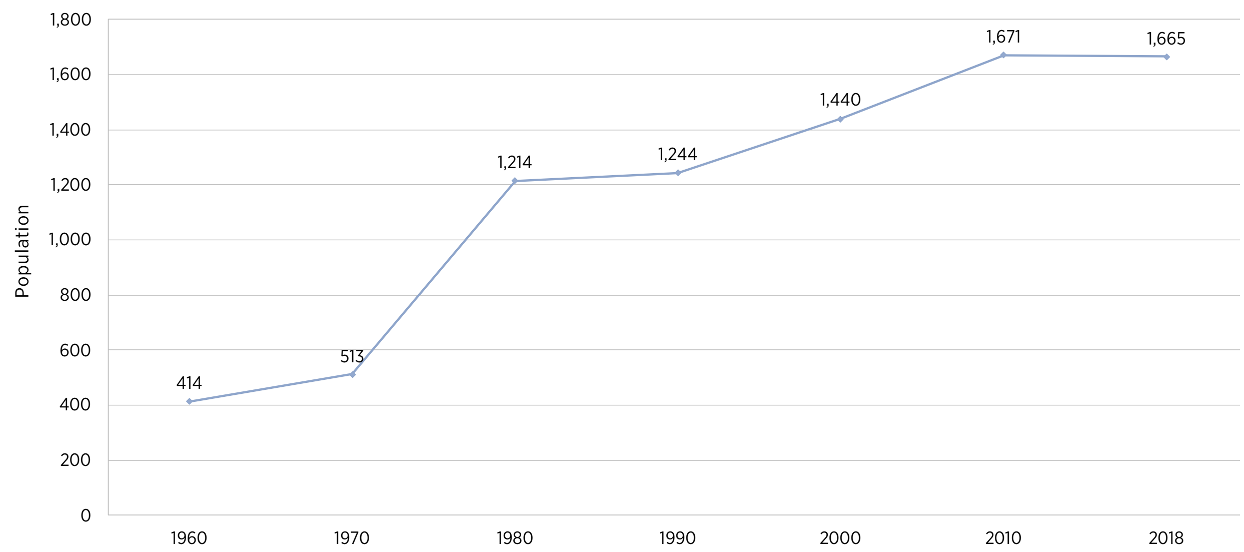
Edgerton is located in southwest Johnson County with access to I-35 and Highway 56, providing residents with easy access to the metro area. The city is less than half developed, leaving ample space to develop new housing options in the next ten years and beyond if overcoming infrastructure barriers.

POPULATION CHANGE

Edgerton's population has been rising since 1950, with the most substantial growth doubling the population in the 1970s. Between 2010 and 2018 the population stayed stagnant despite a steady 1.5% annual population change from 1990 to 2010. **Figure 5.36** illustrates the population change since 1960.

Growth rates projected by MARC and the local plan forecast very aggressive increases not seen since the 1970s at annual rates above 3%. Instead of a 3% rate or greater annually, Edgerton's potential hinges on attracting developers and make land shovel ready. Given this scenario, a 1.44% annual growth rate, just under the average in the 2000s is reasonable in the next five years. It could rise higher to well over 2% annually through 2030 if making significant infrastructure improvements. This scenario would result in about 525 new residents by 2030.

FIGURE 5.36: HISTORIC POPULATION CHANGE, EDGERTON



Source: U.S. Census; American Community Survey (2018 5-year Estimates)

HOUSING OCCUPANCY

Figure 5.37 shows occupancy characteristics in Edgerton.

- Owner-occupancy has remained high near 80% and above of occupied units.
- Vacancy rates are quite stable citywide, remaining at 8% from 2000-2018. However, a more healthy market vacancy rate is around 6%.
- Household size is around 2.8 people per household, about average compared to other cities in Johnson County.

FIGURE 5.37: HOUSING OCCUPANCY, EDGERTON

	2000		2018 5YR		CHANGE 2000-2018
	NUMBER	% OF OCCUPIED UNITS	NUMBER	% OF OCCUPIED UNITS	
OWNER-OCCUPIED	497	84.1%	474	79.4%	420
RENTER-OCCUPIED	94	15.9%	123	20.6%	29
TOTAL VACANT			53		
VACANCY RATE	8.4%		8.2%		
TOTAL UNITS	645		650		5

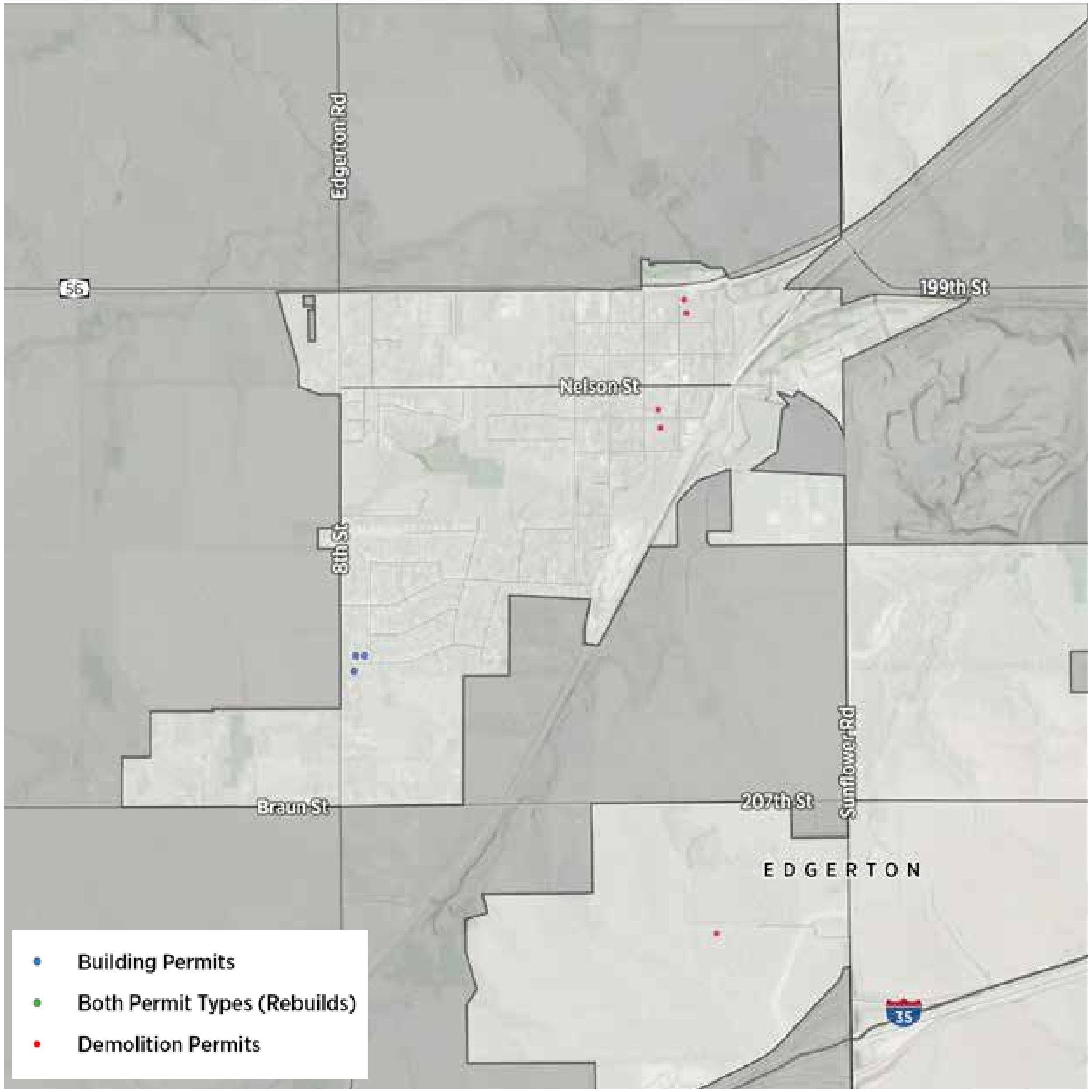
Source: U.S. Census; American Community Survey (2018 5-year Estimates)

CONSTRUCTION ACTIVITY

Edgerton has had very low rates of construction activity since 2010. Demolitions outpaced construction at 23 housing units lost to only six constructed. However, many of these demolitions were for new uses at the Logistics Park Kansas City. In the central city, an older housing stock needs to be maintained to retain attainable housing options for future residents. These units cannot be brought back as new units in the price range of demolished units.

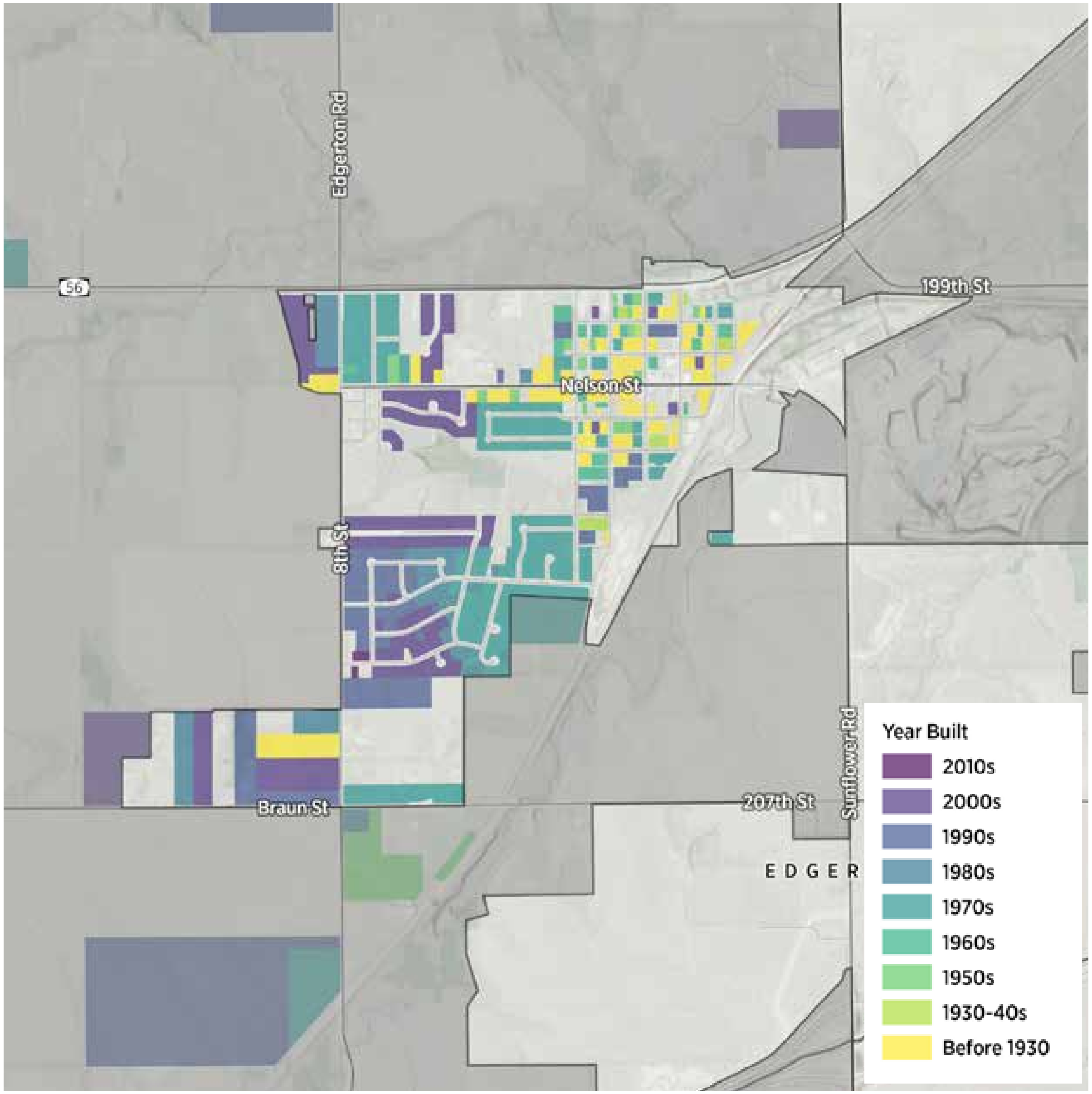
> "Edgerton is in dire need of housing development that meets need for 3 bedroom, 2 bath middle class homes. There is plenty of small "starter" type homes then nothing to grow into. Improved housing choices would lead to better tax base to improve infrastructure."
>
> - Survey Respondent

MAP 5.11: RESIDENTIAL NEW CONSTRUCTION PERMITS BY LOCATION (2010-2019), EDGERTON



Source: Johnson County GIS Department

MAP 5.12: YEAR BUILT, EDGERTON



Source: Johnson County GIS Department

AGE OF HOUSING

Map 5.12 shows the year built of residential dwellings. The age of housing provides preliminary insight into areas more susceptible to deterioration and additional homeowner costs. If these areas are also occupied by lower income households and the elderly, then monitoring of rehabilitation needs is even more important.

- Between 1970 and 2009, 79% of Edgerton's housing stock was constructed, 36% just in the 1970s. Less than 1% of the housing was built in the last ten years.
- About 19% of the housing units were built before 1970.

Edgerton has adequate space for bigger housing for growing families...

- Survey Respondent

HOME SALES

How quickly homes sell in a market is a leading indicator of housing demand and supply. **Figure 5.38** shows home sales data from 2017-2019. In Edgerton:

- Sales prices and the volume sold is steady and low compared to other cities in Johnson County.
- The average days on market varied by year, not at extremely low levels, but homes do not sit for sale for long periods of time either.

FIGURE 5.38: SINGLE FAMILY HOME SALES, DE SOTO

Source: Multiple Listings Service (2017-2019)

"It's a great community, good school & a great "country" alternative in Johnson County. The lack of housing is forcing middle class tax payers out of the community."

- Survey Respondent

HOUSEHOLD INCOME

Figure 5.39 shows the median household income is the second lowest in Johnson County at $54,124, down 11% since 2010. This mirrored a decline in median home values of 4% during the same time period. Median rents, however, increased 14% to $756.

According to the U.S. Government, households spending more than 30% of their income on housing are considered cost-burdened. Additionally, a healthy, self-sustaining housing market will have a value to income ratio between 2 and 3. Edgerton has a value to income ratio of 2.24 indicating a homeownership market that is not overly burdensome for many residents.

- About 22% of homeowners pay more than 30% of their income for homeownership.

Renters appear to be more disproportionately affected by affordability.

- About 39% of renters pay more than 30% of their income on gross contract rent.
- Edgerton's median contract rent is third lowest in Johnson County at $756. This rate is up 14% since 2010 which would not be of great concern except that this coincides with a decline in median income of 11% during the same time.
- A variety of rental units are not available in Edgerton. Therefore, existing rental landlords are able to charge higher prices even if the quality is low.

VALUE TO INCOME RATIO: 2018

FIGURE 5.39: MEDIAN HOUSEHOLD INCOME COMPARISON

2018 MEDIAN INCOME RANGE	CITY	2010-2018 MEDIAN INCOME PERCENT CHANGE RANGE	CITY
<$60,000	• DE SOTO • EDGERTON • MERRIAM	<10%	• DE SOTO • EDGERTON • FAIRWAY • LAKE QUIVIRA • MISSION WOODS • SPRING HILLS
$60,000 - $80,000	• MISSION • GARDNER • ROELAND PARK • SPRING HILLS	10% - 15%	• LEAWOOD • LENEXA • MISSION HILLS • OLATHE • PRAIRIE VILLAGE • WESTWOOD
$80,000 - $100,000	• LENEXA • OLATHE • OVERLAND PARK • PRAIRIE VILLAGE • SHAWNEE • WESTWOOD • JOHNSON COUNTY	15% - 20%	• JOHNSON COUNTY • GARDNER • MERRIAM • OVERLAND PARK • SHAWNEE
>$100,000	• FAIRWAY • LAKE QUIVIRA • LEAWOOD • MISSION HILLS • MISSION WOODS • WESTWOOD HILLS	>20%	• MISSION • ROELAND PARK • WESTWOOD HILLS

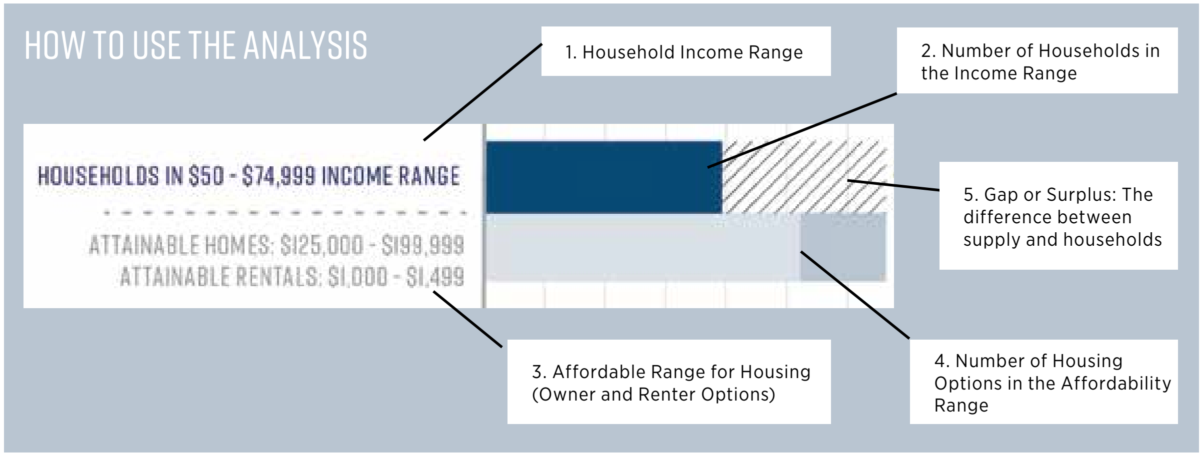
Source: American Community Survey (2018 5-year Estimates)

HOUSING ATTAINABILITY AND SUPPLY ANALYSIS

By comparing the distribution of household incomes with housing costs, a picture of supply and demand emerges across all of Edgerton's housing market. **Figure 5.40** examines supply and demand through the lens of what is "affordable" to different income groups to answer the question: is there an adequate supply of housing options available for residents of different income groups?

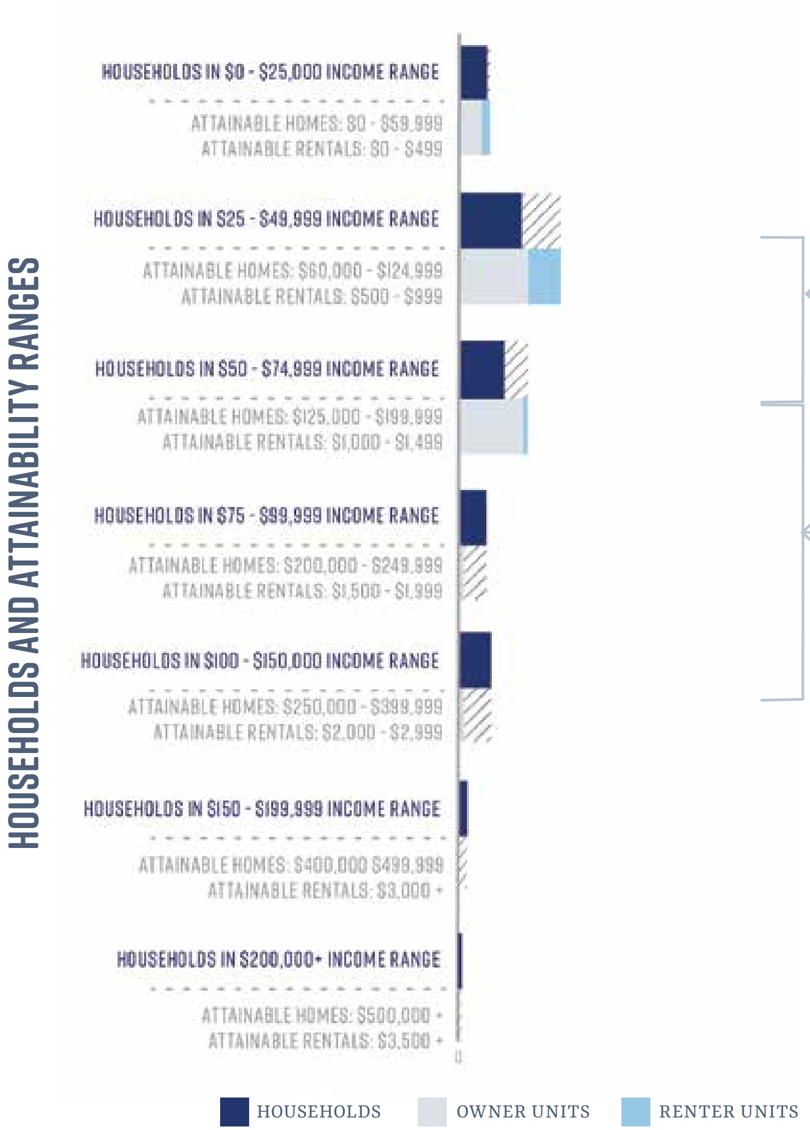
Figure 5.40 illustrates five major components in pursuit of the above story:

1. **Income Ranges.** The starting point of the analysis is the spectrum of incomes across all residents of Edgerton. From these incomes, corresponding "affordable" housing prices are established for ownership and rental opportunities.
2. **Number of Households in Each Income Range.** The number of households in each income range is the demand; these residents seek housing options in Edgerton that are affordable to them.
3. **Affordability Ranges.** An affordable ownership home is calculated at 2-3 times the household income depending on the income range. Lower income households tend to spend a higher percentage of their income on housing and higher income households tend to spend a lower percentage of their total income on housing. An affordable rental would be about 20% of household income.
4. **Number of Housing Units in Each Affordability Range.** The number of housing units in each affordability range is the supply of affordable options.
   - Composition of Housing Supply. This illustrates the share of the supply met by ownership and renter housing options.
5. **The Balance of Supply and Demand.**
   - If the number of households exceeds the number of units available, those households must seek options in different affordability ranges.
   - If the number of units exceeds the number of households, it indicates that the units are occupied by households in different income ranges.
   - **This analysis is meant to illustrate larger trends in how existing units are being occupied. It does not demonstrate exact market demand in certain price ranges.**



The analysis in **Figure 5.40** is based on all the households today that are occupying a unit. No household is without a unit.

FIGURE 5.40: HOUSING ATTAINABILITY,EDGERTON (2018)



Source: American Community Survey (2018 5-year Estimates); RDG Planning & Design

There are units in Edgerton that would be attainable for household's making up to $75,000. These units should be maintained as attainable options for many households in the future.

- There are units in Edgerton that would be attainable for household's making up to $75,000. The surplus in at this price point reflects the older housing stock in Edgerton. These units should be maintained as attainable options for many households in the future.
  - However, there are few rental options at other price points, leading all households to compete for the same price point units.

- The greatest shortage is for households in higher income ranges making more than $75,000. Most housing for these income ranges will be in the form of owner-occupied housing.
  - The gap indicates that new homes priced above $200,000 and rentals above $1,500 a month could be viable options in Edgerton.

COMMUNITY PERCEPTIONS

A total of 78 residents completed the community survey. This sample size provides several themes from the survey results:

- Many are aware of an undersupply of lots in the community.
- The most successful housing products by respondents include small and mid-sized houses.
- Respondents were not as favorable to large houses, cottage courts, and mixed-income housing near transit.
- Respondents recognize the attainable home options in Edgerton as starter homes, but also that these homes often need rehabilitation help.

LISTENING SESSIONS

Many people familiar with the housing market specific to Edgerton participated in small group discussions. These included representatives from the City Council, Planning Commission, staff, and real estate agents, among others.

COMMON COMMENTS

Aside from common themes in Chapter 2 that pertain to the entire county, several common themes are apparent to Edgerton.

- Interestingly, Edgerton is the only community in Johnson County with very little housing development, mostly because of the size of available parcels and access to utility infrastructure.
- Some people think the Logistics Park Kansas City will affect the quality of life in the community, but it has not and provides many good, higher paying jobs.
- Internet access is a big issue for Edgerton - slow and lagging, which is a deterrent for attracting new residents.
- Cost of extending infrastructure is an issue for expansion but not out of reach if developers recognize the demand for housing is high.
- Most people that work at the Logistics Park facilities live within a 30 minute drive. There is a demand for multi-family closer to the facilities to reduce commute times for workers.

HOUSING DEMAND

The housing demand analysis builds on the population projections, housing trends, and community conversations to forecast the demand for additional housing. The model is built on the following assumptions with a 1.44% growth rate through 2025, increasing to the MARC rate of 3.5% through 2030:

- The proportion of the household population (those living in households and not in skilled nursing or prisons) will remain stable through 2030.
- Average people per household is expected to remain constant over the next decade. Some growth may occur as Millennials move into their childbearing years, but Baby Boomer households will also continue to shrink.
- Unit demand at the end of the period is calculated by dividing household population by the number of people per household. This equals the number of occupied housing units.
- A manageable housing vacancy provides housing choices for residents moving to the community. As noted earlier, the rate in Edgerton is slightly high and should decrease over time as the worst units are removed from the market.
- Unit needs at the end of each period are based on the actual household demand plus the number of projected vacant units.
- Replacement need is the number of housing units demolished or converted to other uses. Homes in poor condition or obsolete should be gradually replaced in a city's housing supply. The number of units lost annually is based on historic demolition rates.
- Cumulative need shows the number of total units needed between the base year of 2020 and the year indicated at the end of the period.

Figure 5.41 shows an average annual construction need of 21 units. The average annual construction rate from 2010 to 2019 was under one unit annually, making this an aspirational growth strategy for Edgerton.

DEVELOPMENT PROGRAM

Building on the housing demand model, the development program forecasts production targets for owner and renter-occupied units based on the following assumptions:

- Owner-occupied units will be distributed roughly in proportion to the income distributions of the households for whom owner occupancy is an appropriate strategy.
- Most low-income residents will be accommodated in rental units.
- Over the next ten years, production levels need to balance to provide the housing variety necessary for a growing population. Therefore, the model illustrated in **Figure 5.42** targets a split of 80% owner- and 20% renter-occupied units, adjusting to 75%-25% by 2030.
- Approximately 118 additional owner-occupied units should be priced below $250,000. This demand will come through the city's existing housing stock being freed up through move-up housing, or products that do not fit the traditional detached single-family homes.
- Nearly 27 rental units will need to be produced with rents below $1,000 per month. These units are generally one-bedroom or will have to be generated through programs like low-income housing tax credits.

FIGURE 5.41: HOUSING DEMAND MODEL, EDGERTON

	2020	2025	2030	TOTAL
POPULATION AT END OF PERIOD	1,713	1,841	2,188	
HOUSEHOLD POPULATION AT END OF PERIOD	1,713	1,841	2,188	
AVERAGE PEOPLE PER HOUSEHOLD	2.80	2.80	2.80	
HOUSEHOLD DEMAND AT END OF PERIOD	612	657	782	
PROJECTED VACANCY RATE	8.0%	7.5%	7.0%	
UNIT NEEDS AT END OF PERIOD	665	711	840	
REPLACEMENT NEED (TOTAL LOST UNITS)		15	15	30
CUMULATIVE NEED DURING PERIOD		61	145	205
AVERAGE ANNUAL CONSTRUCTION		12	29	21

Source: RDG Planning & Design

FIGURE 5.42: HOUSING DEVELOPMENT PROGRAM, EDGERTON

	2025		2030		2020-2030	
TOTAL OWNER OCCUPIED		48		108		157
ATTAINABLE: <$200,000	29		65		94	
MODERATE MARKET: $200-250,000	7		17		24	
MARKET: $250-350,000	9		20		28	
HIGH MARKET: OVER $350,000	3		7		10	
TOTAL RENTER OCCUPIED		12		36		48
ATTAINABLE: LESS THAN $1,000	7		20		27	
MARKET: $1,000-1,500	3		10		13	
HIGH MARKET: $1,500+	2		6		8	
TOTAL NEED		61		145		205

Source: RDG Planning & Design

CHAPTER SIX
SMALL-TIER COMMUNITIES

Small tier cities in Johnson County are well established neighborhoods of primarily single-family housing. These cities are well-maintained. Growth will only occur from changes in density or larger households. Maintaining the character of the neighborhoods is the primary goal for the future.

FAIRWAY

Fairway is an established community in northeast Johnson County. There are a few small commercial corners in the city with the northwest portion occupied by the University of Kansas Medical Center. Much of the community is single-family dwellings at the higher end of price points than the rest of the county.

POPULATION CHANGE

As a landlocked city, population change mainly fluctuates by household size. Fairway originated as a golf course subdivision primarily suited for families. As family households dwindled as children left the house, the population subsequently declined. Since 1960 the population of Fairway steadily through 2010. Since 2010, the population grew.

HOUSING OCCUPANCY

Housing in Fairway remains primarily single-family, ranging around 90% of total housing units. Vacancy rates also remain low, likely reflecting little turn-over in homes and the desirability of the community. **Figure 6.2** illustrates the change between 2000 and 2018.

CONSTRUCTION ACTIVITY

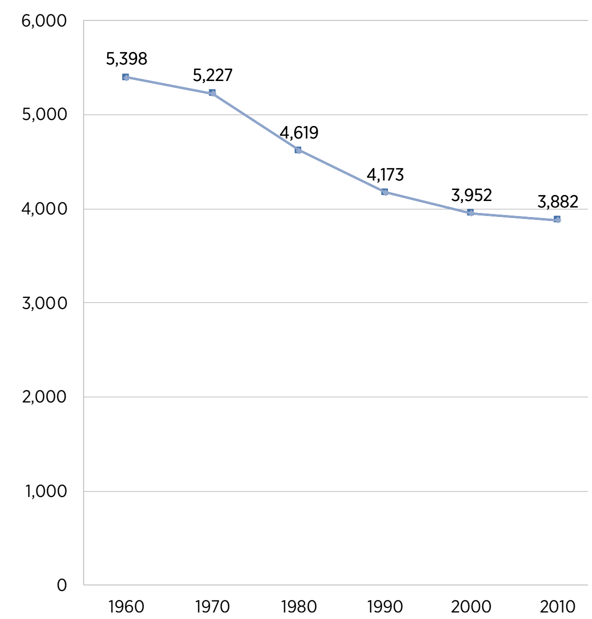
Changing preferences and lack of buildable areas in northeast Johnson County create pressure for redevelopment. In addition to higher housing costs, the market is seeing consistent rebuilds on existing lots. In the past ten years there were 91 lots where an existing house was acquired, demolished, and rebuilt at a larger footprint.

This practice results in several effects for Fairway:

- Home prices and assessed values rise from the new construction.
- Existing homes at more attainable prices are eliminated from the housing market.
- What some may argue as historical neighborhoods become incomplete with scattered larger, modern homes that were not intended when Fairway was originally platted.

The city began to take some efforts to regulate the character of rebuilds, but the practice will continue to be an issue to balance in the future.

FIGURE 6.1: HISTORIC POPULATION CHANGE, FAIRWAY



Source: U.S. Census

FIGURE 6.2: HOUSING OCCUPANCY, FAIRWAY

	2000		2018 5YR		CHANGE 2000-2018
	NUMBER	% OF OCCUPIED UNITS	NUMBER	% OF OCCUPIED UNITS	
OWNER-OCCUPIED	1,538	87.9%	1,595	91.9%	57
RENTER-OCCUPIED	211	12.1%	141	8.1%	-70
TOTAL VACANT	84		134		50
VACANCY RATE	4.6%		7.2%		
TOTAL UNITS	1,833		1,870		37

Source: U.S. Census; American Community Survey (2018 5-year Estimates)

HOUSING COSTS

Figure 6.3 displays housing cost characteristics in Fairway. Fairway residents have high incomes, but the housing stock is also high value. According to the U.S. Government, households spending more than 30% of their income on housing are considered cost-burdened. Additionally, a healthy, self-sustaining housing market will have a value to income ratio between 2 and 3. By these metrics, Fairway has an overall unaffordable housing ownership market.

- Fairway has a value to income ratio of 3.35, indicating a homeownership market that is high priced relative to resident incomes. About 19% of homeowners pay more than 30% of their income for homeownership.
    - However, about 30% of homeowners do not have a mortgage.

The burden for renters is even more pronounced. Rents in Fairway since 2010 increased four times more than incomes. However, only 10% of all housing units in Fairway are rentals. About 59% of renters pay more than 30% of their income on gross rent.

- Low rental supply, and thus a competitive market, often results in higher rental prices. With few opportunities for new rentals, there is likely to continue to be high rent prices.

COMMUNITY PERCEPTIONS

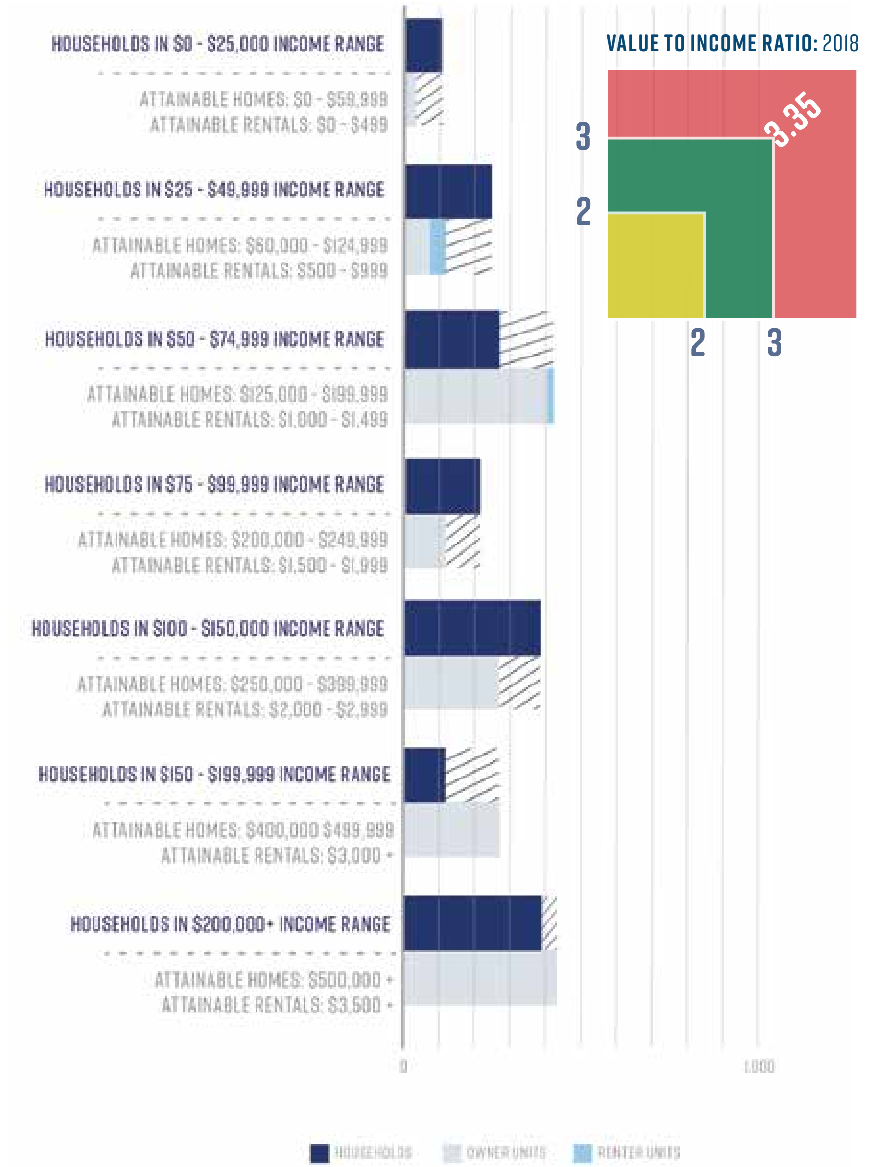
A total of 144 residents of Fairway took the community survey. Further discussions occurred with representatives from Council, Planning Commission, staff, and other stakeholders.

ISSUES & OPPORTUNITIES

Aside from common themes in Chapter 2 that pertain to the entire county, several issues and opportunities are apparent to Fairway.

- Fairway is one of the communities with prevalent demolition and rebuild activity, with these residents coming from outside the city or residents wanting to up-size.
- Opportunity to update codes to allow multi-generational housing without demolishing homes. Such as accessory dwelling units.

FIGURE 6.3: HOUSING AFFORDABILITY, FAIRWAY



Source: American Community Survey (2018 5-year Estimates); RDG Planning & Design

- Trends in the last ten years include housing turnover from the oldest age cohorts to younger families moving in with children. Retirees with needs need to look elsewhere.

LAKE QUIVIRA

Lake Quivira is a small community in Johnson and Wyandotte counties only recently established. The housing stock centers around a lake, which gives the community its name, with the Lake Quivira County Club located in the northeast corner of the community. Lake Quivira only has single-family detached residential units, almost entirely owner-occupied.

POPULATION CHANGE

Figure 6.4 demonstrates population change since Lake Quivira was established in 1970. The first decade saw a large rise in population which has since declined. Between 2010 and 2018. However, the community added 76 residents, reversing decades of slow decline.

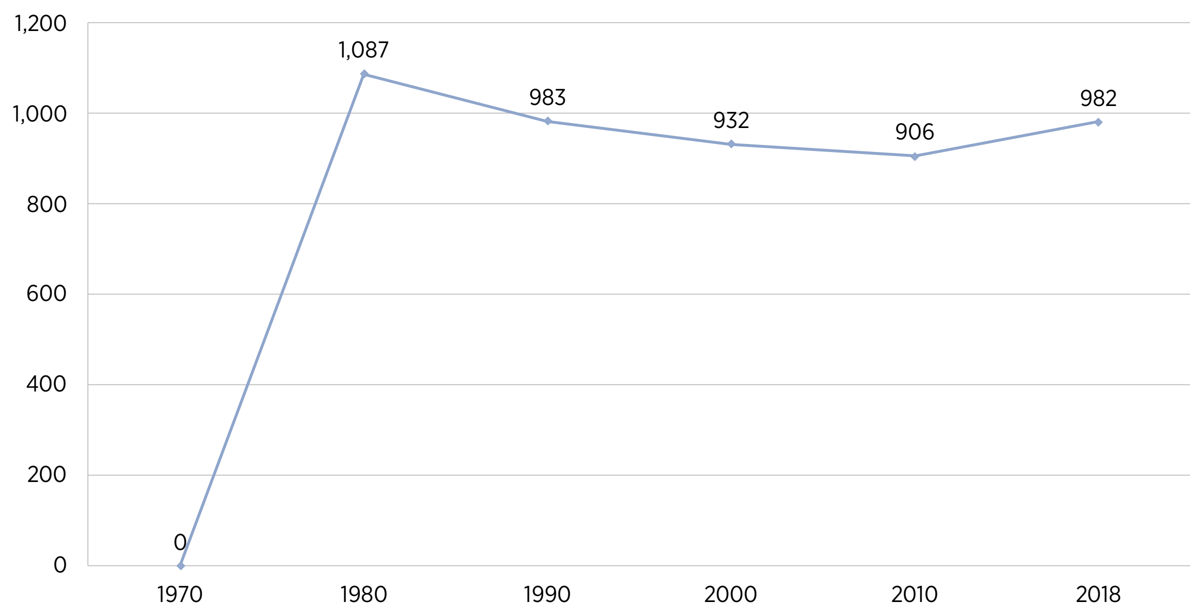
HOUSING OCCUPANCY

Housing in Lake Quivira remains entirely single-family ranging with less than 1% available to renters. The vacancy rate was fairly healthy in 2000, however was reported at almost 15% in 2018. This high vacancy rate is the result mostly from homes that were vacant for unknown reasons according to the 2018 American Community Survey estimates. This is not concerning because the community is so small and margin of errors in ACS data are high. Figure 6.5 illustrates the change between 2000 and 2018.

CONSTRUCTION ACTIVITY

Much of the existing homes were constructed between 1940 and 1970 (65%). However, between 2000 and 2009 another 10% of the housing stock was built. No units had been built in Lake Quivira between 2009 and 2017. In the past three years, ten new single-family homes were built.

FIGURE 6.4: HISTORIC POPULATION CHANGE, LAKE QUIVIRA



Source U.S. Census; American Community Survey (2018 5-year Estimates)

FIGURE 6.5: HOUSING OCCUPANCY, LAKE QUIVIRA

	2000		2018		CHANGE 2000-2018
	NUMBER	% OF OCCUPIED UNITS	NUMBER	% OF OCCUPIED UNITS	
OWNER-OCCUPIED	365	92.4%	349	99.4%	-16
RENTER-OCCUPIED	30	7.6%	2	0.6%	-28
TOTAL VACANT	22		67		45
VACANCY RATE	5.3%		16.0%		
TOTAL UNITS	414		418		4

Source: U.S. Census; American Community Survey (2018 5-year Estimates)

HOUSING COSTS

Figure 6.6 displays housing cost characteristics in Lake Quivira. As illustrated, there are no units available to households making less than $75,000, largely because of the lack of any rental units in the community. A surplus of units priced above $150,000 exists.

Lake Quivira residents have high incomes (5th highest median income in Johnson County at $130,750), but the housing stock has the 3rd highest median home value ($596,200). According to the U.S. Government, households spending more than 30% of their income on housing are considered cost-burdened. Additionally, a healthy, self-sustaining housing market will have a value to income ratio between 2 and 3. By these metrics, Lake Quivira has an overall unaffordable housing ownership market.

- Lake Quivira has a value to income ratio of 4.56 indicating a homeownership market that is high priced relative to resident incomes. About 28% of homeowners pay more than 30% of their income for homeownership.
    - › About 41% of homeowners in Lake Quivira do not have a mortgage.
- However, the housing market in the community is not meant to serve a broad range and appeals to one subset of the population in Johnson County.

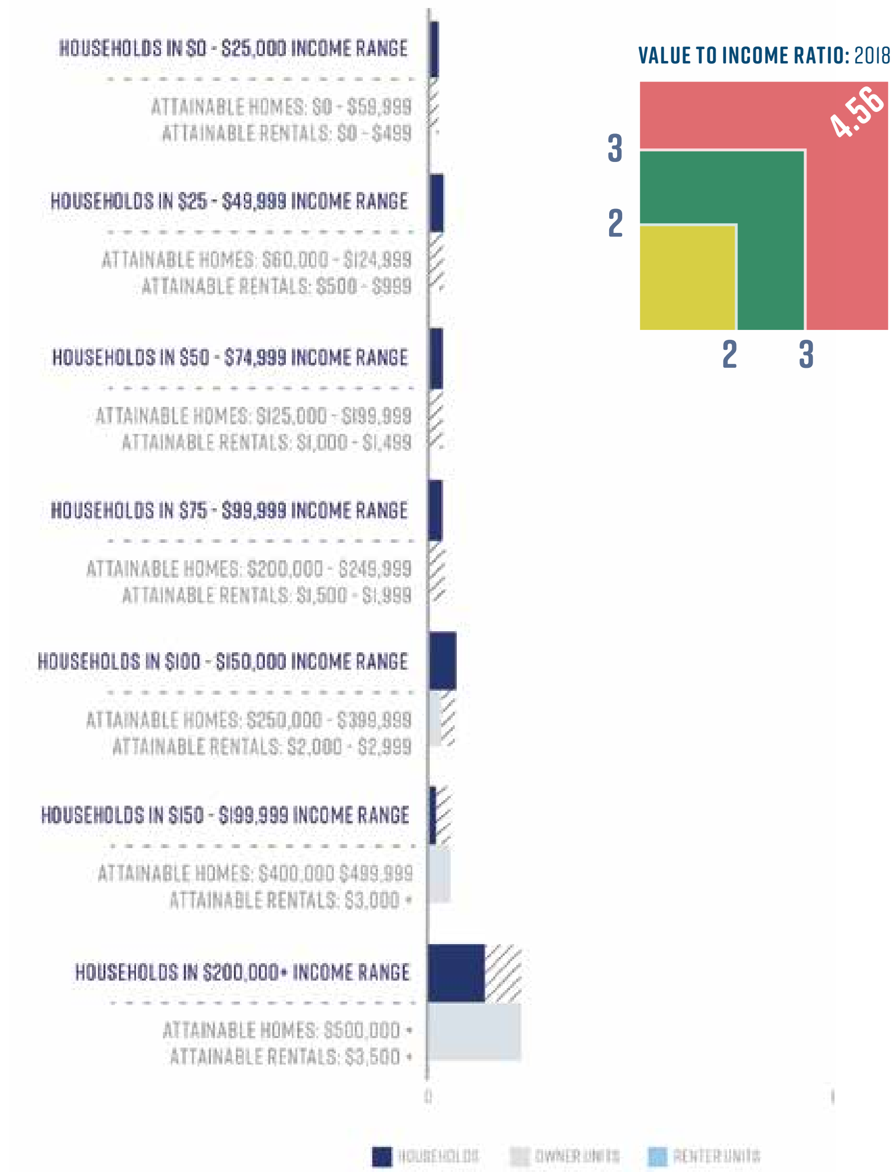
COMMUNITY PERCEPTIONS

A total of 94 residents of Lake Quivira took the community survey.

ISSUES & OPPORTUNITIES

- Lake Quivira is a unique community that is not meant to serve a variety of housing types and preferences. The community does provide one desired housing product for the Johnson County market, larger homes with four or more bedrooms.

FIGURE 6.6: HOUSING AFFORDABILITY, LAKE QUIVIRA



Source: American Community Survey (2018 5-year Estimates); RDG Planning & Design

MISSION HILLS

Mission Hills is located in eastern Johnson County on the state line bordering Missouri. The community is unique because it has three golf courses located within its corporate limits. There are no commercial developments within the city limits and the housing stock is entirely single-family detached dwellings at the higher end of price points compared to the rest of the county.

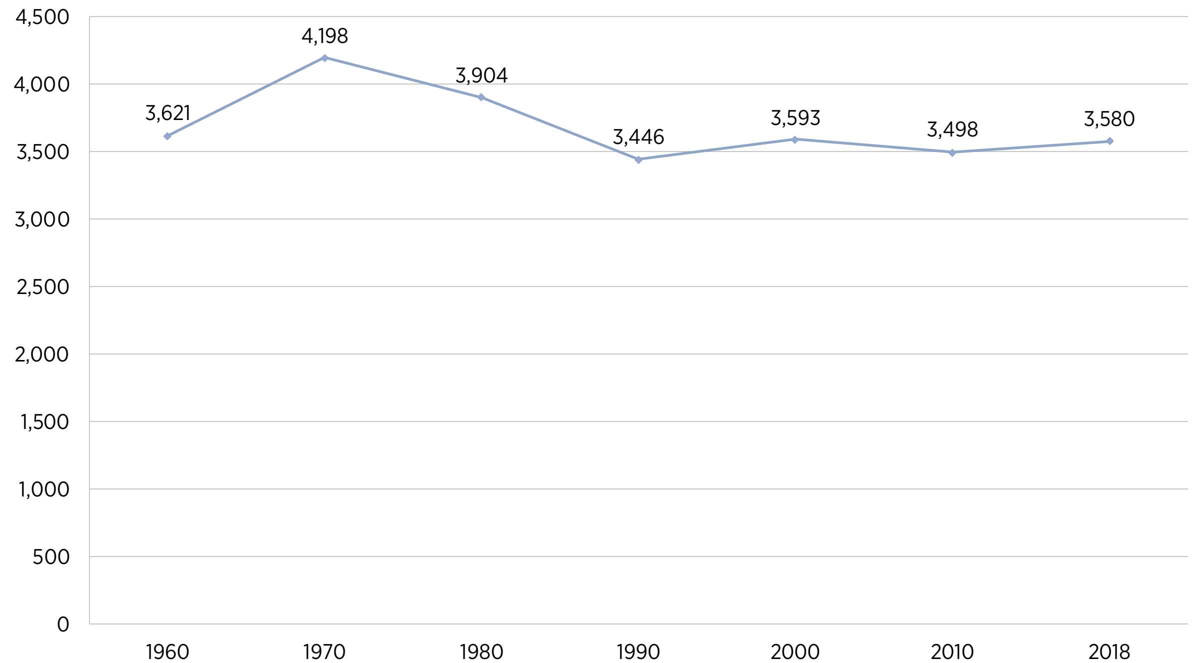
POPULATION CHANGE

Similar to other smaller communities in Johnson County, Mission Hills saw a population increase between 1960 and 1970, which has since declined as shown in **Figure 6.7.** This is mainly due to the land locked nature of the city in tandem with the low density residential development pattern. Between 2010 and 2018 the city did see a slight boost in residents.

HOUSING OCCUPANCY

Housing in Mission Hills remains single-family ranging and almost entirely owner-occupied (98.6%). Vacancy rates remain low, likely reflecting little turn-over in homes and the desirability of the community. **Figure 6.8** illustrates the change between 2000 and 2018.

FIGURE 6.7: HISTORIC POPULATION CHANGE, MISSION HILLS



Source: U.S. Census; American Community Survey (2018 5-year Estimates)

FIGURE 6.8: HOUSING OCCUPANCY, MISSION HILLS

	2000		2018		CHANGE 2000-2018
	NUMBER	% OF OCCUPIED UNITS	NUMBER	% OF OCCUPIED UNITS	
OWNER-OCCUPIED	1,238	98.8%	1,212	98.6%	-26
RENTER-OCCUPIED	15	1.2%	17	1.4%	2
TOTAL VACANT	73		116		43
VACANCY RATE	5.5%		8.6%		
TOTAL UNITS	1,326		1,345		19

Source: U.S. Census; American Community Survey (2018 5-year Estimates)

CONSTRUCTION ACTIVITY

Changing preferences and lack of buildable areas in northeast Johnson County create pressure for redevelopment. In addition to higher housing costs, the market is seeing consistent rebuilds on existing lots. Since 2010, 50 lots with an existing house were acquired, demolished, and rebuilt at a larger footprint. This trend is one reason for a 13% increase in median home value between 2010 and 2018.

HOUSING COSTS

Figure 6.9 displays housing cost characteristics in Mission Hills. There are a lack of attainable units to households making between $25,000 and $150,000, with surplus units above and below this range.

Mission Hills has the highest median income in Johnson County ($250,000+) and the highest median home value ($976,200). According to the U.S. Government, households spending more than 30% of their income on housing are considered cost-burdened. Additionally, a healthy, self-sustaining housing market will have a value to income ratio between 2 and 3. By these metrics, Mission Hills has an overall unaffordable housing ownership market for its residents.

- Mission Hills has a value to income ratio of 3.90, indicating a homeownership market that is high priced relative to resident incomes. About 20% of homeowners pay more than 30% of their income for homeownership.
  - However, just under half of homeowners in Mission Hills do not have a mortgage.
- Like other smaller communities in northeast Johnson County, the housing market in the community is meant to serve one subset of the population in Johnson County.

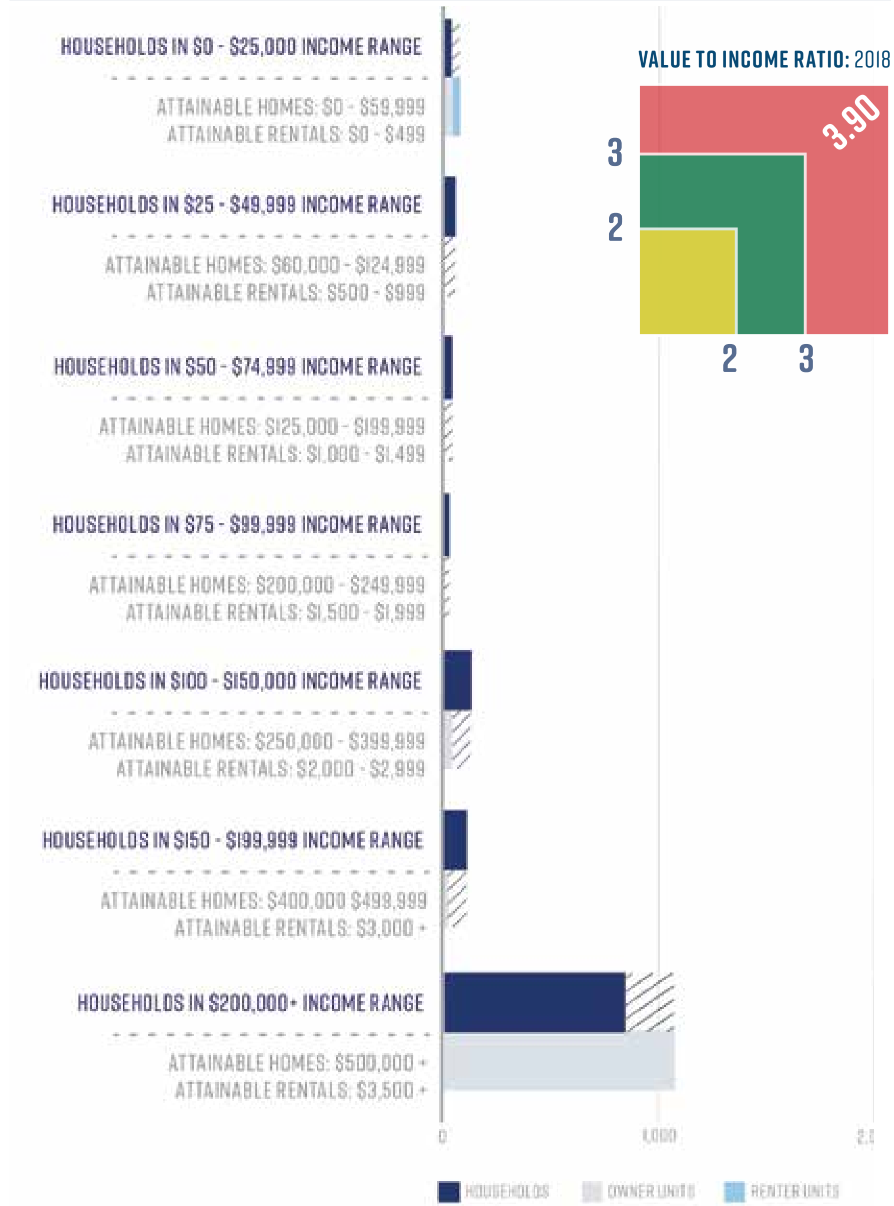
COMMUNITY PERCEPTIONS

Seven community surveys were received from residents. Discussions also occurred with representatives from Council, Planning Commission, staff, and other stakeholders.

ISSUES & OPPORTUNITIES

- Recent demolition and rebuilds are occurring in Mission Hills and there is a desire to maintain the scale of neighborhoods. Rebuilds also cause issues with stormwater runoff that affects neighbors. New design standards in 2020 are an opportunity to start to address these issues.

FIGURE 6.9: HOUSING AFFORDABILITY, MISSION HILLS



Source: American Community Survey (2018 5-year Estimates); RDG Planning & Design

MISSION WOODS

Mission Woods is a very small community in northeast Johnson County on the border with Missouri. Unlike some of the other small Johnson County communities, Mission Woods has a small commercial node between the two residential areas separated by Shawnee Mission Parkway.

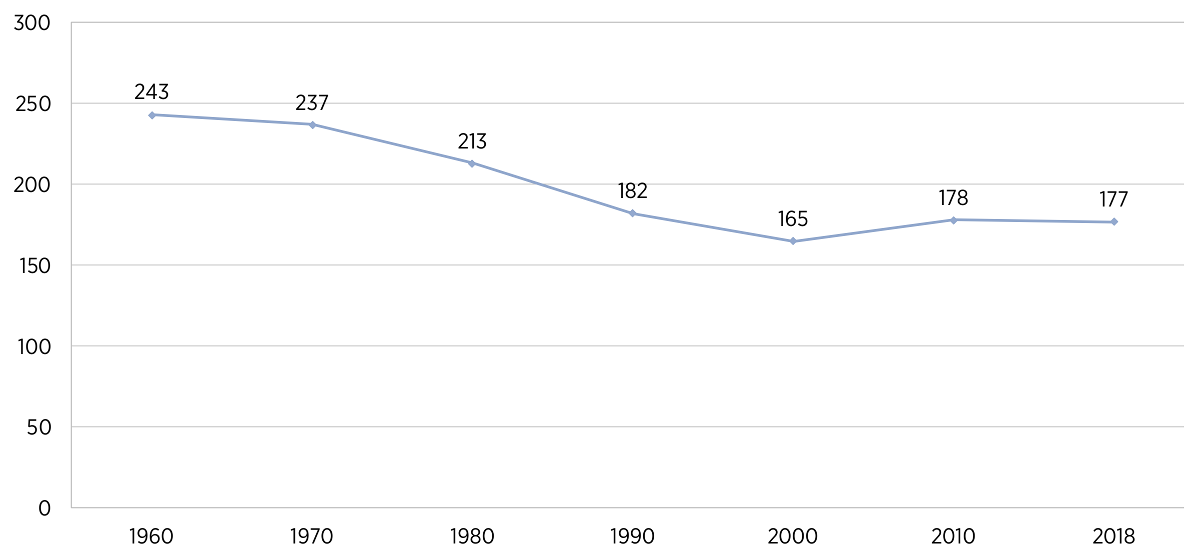
POPULATION CHANGE

As a landlocked city, population change mainly fluctuates by household size. **Figure 6.10** shows Mission Woods population has been in decline since 1960 but recently bumped between 2000 and 2010. Only one new housing unit was constructed during this time. Therefore population growth was a result of increased household size and a decline in vacancy rates.

HOUSING OCCUPANCY

Mission Woods has a very small housing stock with only 80 units. All of the units are single-family detached and occupied almost entirely as owner units (97.4%). The vacancy rate remains very low, at only 2.5%. Many residents in Mission Woods are life-long residents. **Figure 6.11** illustrates the change between 2000 and 2018.

FIGURE 6.10: HISTORIC POPULATION CHANGE, MISSION WOODS



Source: U.S. Census; American Community Survey (2018 5-year Estimates)

FIGURE 6.11: HOUSING OCCUPANCY, MISSION WOODS

	2000		2018		CHANGE 2000-2018
	NUMBER	% OF OCCUPIED UNITS	NUMBER	% OF OCCUPIED UNITS	
OWNER-OCCUPIED	74	96.1%	76	97.4%	2
RENTER-OCCUPIED	3	3.9%	2	2.6%	-1
TOTAL VACANT	3		2		-1
VACANCY RATE	3.8%		2.5%		
TOTAL UNITS	80		80		0

Source: U.S. Census; American Community Survey (2018 5-year Estimates)

CONSTRUCTION ACTIVITY

Mission Woods has an older housing stock, primarily built before 1969. Only 7% of housing units were constructed after 1970, with only one unit constructed since 2009. The small neighborhood that comprises the city is built up and the existing housing stock will remain for the planning horizon.

HOUSING COSTS

Figure 6.12 displays housing cost characteristics in Mission Woods. Residents have high incomes (2nd highest in Johnson County at $165,000), but the housing stock is also high value. According to the U.S. Government, households spending more than 30% of their income on housing are considered cost-burdened. Additionally, a healthy, self-sustaining housing market will have a value to income ratio between 2 and 3. By these metrics, Mission Woods has an overall unaffordable housing ownership market. Despite the high median home values, they have remained nearly the same, rising only 1% since 2010 to $656,300 in 2018.

- Mission Woods has a value to income ratio of 4.29, indicating a homeownership market that is high priced relative to resident incomes. Despite this high ratio, only 7% of homeowners pay more than 30% of their income for homeownership.
- Like other smaller communities in northeast Johnson County, the housing market in the community is meant to serve one subset of the population in Johnson County.

COMMUNITY PERCEPTIONS

Two community surveys were received from residents, although the population is below 200. Discussions also occurred with other stakeholders that know the area around Mission Woods.

ISSUES & OPPORTUNITIES

- Mission Woods is a unique community that is not meant to serve a variety of housing types and preferences. The community does provide one desired housing product for the Johnson County market, larger homes with four or more bedrooms.

FIGURE 6.12: HOUSING AFFORDABILITY, MISSION WOODS

Source: American Community Survey (2018 5-year Estimates); RDG Planning & Design

WESTWOOD

Westwood is an established city in northeast Johnson County. There are a few small commercial corners in the city with the northwest portion occupied by Walmart. Much of the community is single-family dwellings at the mid-range of values in Johnson County.

POPULATION CHANGE

As a landlocked city, population change mainly fluctuates by household size. Westwood, like many cities in northeast Johnson County, saw a population increase in the 1960s followed by several decades of decline. Since 2010, the population grew as shown in **Figure 6.13**.

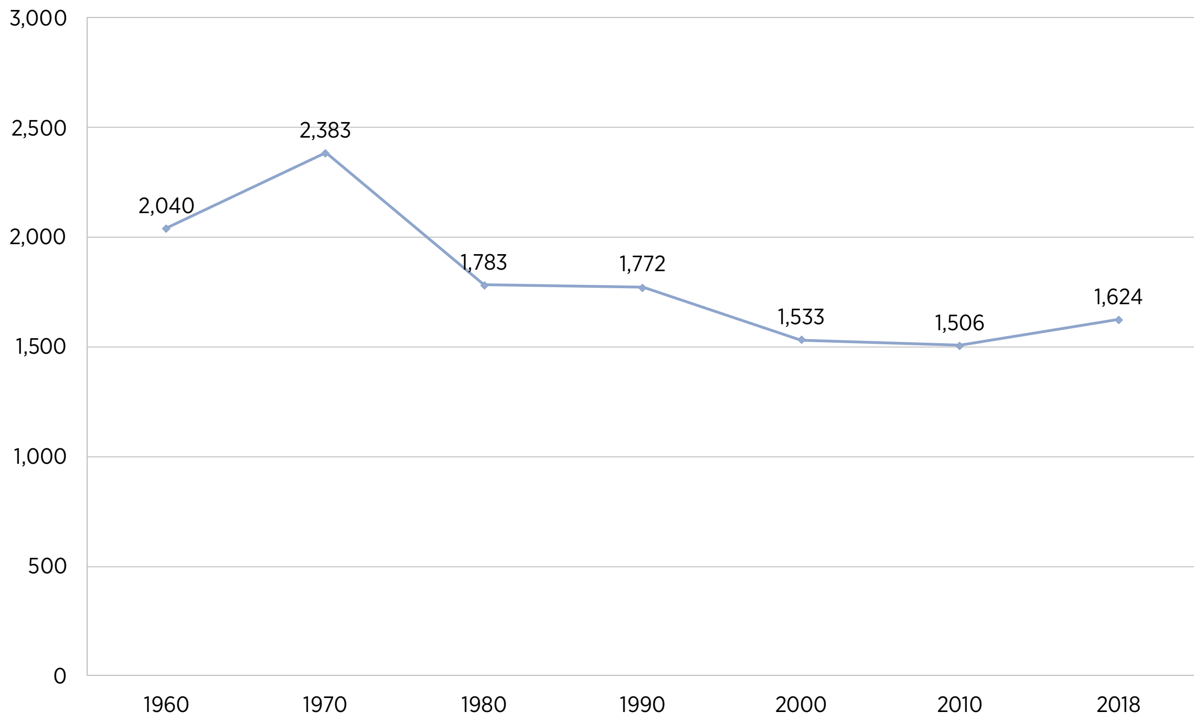
HOUSING OCCUPANCY

Housing in Westwood remains primarily single-family at about 98% of total housing units. However, the Woodside Village Apartments completed in 2016 added 91 multi-family units to the city, which do not appear to be included in Census figures. Westwood has a higher renter occupancy rate (15%) than surrounding smaller communities. Vacancy rates remain low but have increased since 2000 to 8.9%. **Figure 6.14** illustrates the change between 2000 and 2018.

CONSTRUCTION ACTIVITY

Changing preferences and lack of buildable areas in northeast Johnson County create pressure for redevelopment. In addition to higher housing costs, the market is seeing consistent rebuilds on existing lots. Since 2010 Westwood saw 21 new single-family units constructed with 13 demolitions. Ninety-one new multi-family units were constructed in 2016 at the Woodside Village Apartments.

FIGURE 6.13: HISTORIC POPULATION CHANGE, WESTWOOD



Source: U.S. Census; American Community Survey (2018 5-year Estimates)

FIGURE 6.14: HOUSING OCCUPANCY, WESTWOOD

	2000		2018		CHANGE 2000-2018
	NUMBER	% OF OCCUPIED UNITS	NUMBER	% OF OCCUPIED UNITS	
OWNER-OCCUPIED	591	85.3%	579	84.6%	-12
RENTER-OCCUPIED	102	14.7%	105	15.4%	3
TOTAL VACANT	39		67		28
VACANCY RATE	5.3%		8.9%		
TOTAL UNITS	732		751		19

Source: U.S. Census; American Community Survey (2018 5-year Estimates)

HOUSING COSTS

Figure 6.15 displays housing cost characteristics in Westwood. Westwood residents have lower median incomes ($82,500), in line with lower median home values ($238,000). According to the U.S. Government, households spending more than 30% of their income on housing are considered cost-burdened. Additionally, a healthy, self-sustaining housing market will have a value to income ratio between 2 and 3. By these metrics, Westwood has a healthy housing market but is nearing an unaffordable level.

- Westwood has a value to income ratio of 2.98, indicating a homeownership market that is high priced relative to resident incomes. About 20% of homeowners pay more than 30% of their income for homeownership.

The burden for renters is more pronounced. Rents in Westwood since 2010 increased by $419 and is the third highest median contract rent in Johnson County. Although only 15% of all housing units in Westwood are rentals, about 28% of renters pay more than 30% of their income on contract rent.

- Low rental supply, and thus a competitive market, often results in higher rental prices. With few opportunities for new rentals, there is likely to continue to be high rent prices. The Woodside Village Apartments referenced earlier rent between $1,500 and $3,000, adding to the market rate rental stock.

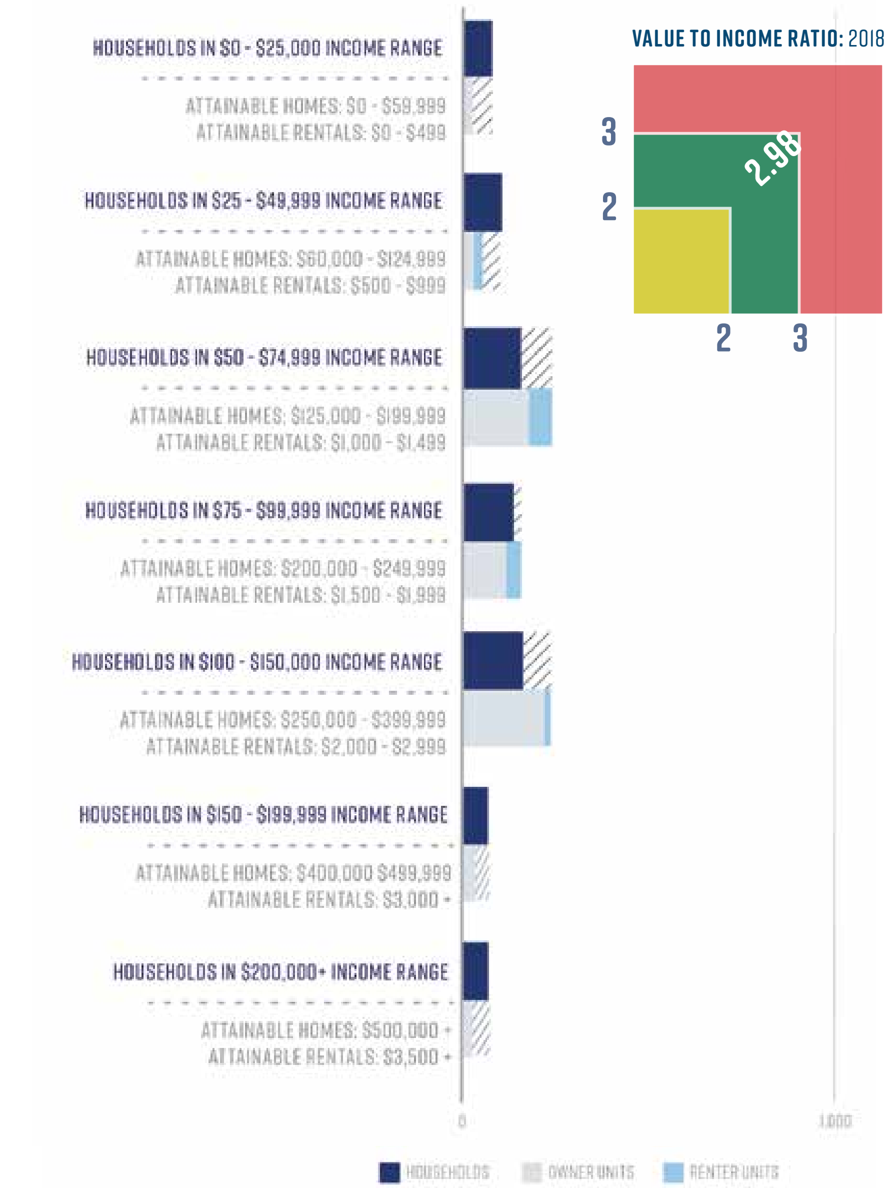
COMMUNITY PERCEPTIONS

A total of 27 residents took the community survey. Discussions also occurred with representatives of the Planning Commission and other stakeholders that have knowledge of the area around Westwood.

ISSUES & OPPORTUNITIES

- Westwood has issues with rebuilds like other nearby cities. Lots are smaller and rebuilds are taking up the entire lots. This affects the elderly population who do not know what their lot is worth in the market and may sell at prices lower than its worth.
- Seniors that cannot age in place tend to move to southwest Johnson County or other counties. Single level homes or universal design rehabilitations are an opportunity to offer a needed product in Westwood.

FIGURE 6.15: HOUSING AFFORDABILITY, WESTWOOD



Source: American Community Survey (2018 5-year Estimates); RDG Planning & Design

- There are some larger redevelopment prospects in the city but residents do tend to push back at the changes.

WESTWOOD HILLS

Westwood Hills is a very small residential enclave with one commercial node at the southeast corner of the community. The housing stock is relatively aged, with 77% built before 1939 almost entirely as single-family detached units (99%).

POPULATION CHANGE

As a landlocked community, population change mainly fluctuates by household size. As family households dwindled as children left the house, the population subsequently declined. Since 1960 the population of Westwood Hills has declined through 2010. Since 2010, the population grew slightly, as shown in **Figure 6.16**.

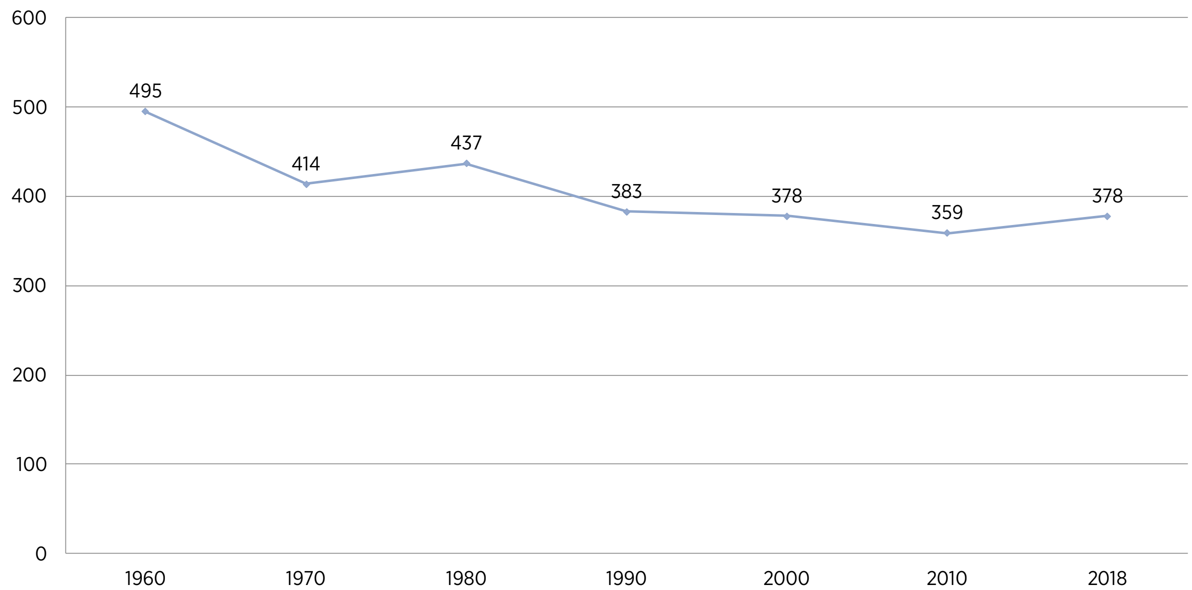
HOUSING OCCUPANCY

Housing in Westwood Hills remains primarily single-family detached housing units. Renter-occupied units comprise just about 5% of the market. Vacancy rates also remain healthy and stable, at about 6% since 2000. **Figure 6.17** illustrates the change between 2000 and 2018.

CONSTRUCTION ACTIVITY

Westwood Hills has not seen any new construction activity since 1990. As mentioned, most of the housing stock was constructed before 1939. Unlike nearby communities, Westwood Hills has not seen the high levels of demolition and rebuilds in recent years, likely a factor of its historic designation.

FIGURE 6.16: HISTORIC POPULATION CHANGE, WESTWOOD HILLS



Source: U.S. Census; American Community Survey (2018 5-year Estimates)

FIGURE 6.17: HOUSING OCCUPANCY, WESTWOOD HILLS

	2000		2018		CHANGE 2000-2018
	NUMBER	% OF OCCUPIED UNITS	NUMBER	% OF OCCUPIED UNITS	
OWNER-OCCUPIED	153	91.6%	164	95.1%	3
RENTER-OCCUPIED	14	8.4%	8	4.9%	-6
TOTAL VACANT	10		12		2
VACANCY RATE	5.6%		6.6%		
TOTAL UNITS	177		176		-1

Source: U.S. Census; American Community Survey (2018 5-year Estimates); City of Westwood Hills

HOUSING COSTS

Figure 6.18 displays housing cost characteristics in Westwood Hills. Westwood Hills has the 5th highest median home value in Johnson county ($395,500), which is up 11% since 2010. Median incomes are also high, which are 4th in the county at $132,500. According to the U.S. Government, households spending more than 30% of their income on housing are considered cost-burdened. Additionally, a healthy, self-sustaining housing market will have a value to income ratio between 2 and 3. By these metrics, Westwood Hills has an overall attainable housing ownership market.

- Westwood Hills' value to income ratio dropped to 2.98 from 3.68 in 2010, indicating a homeownership market that is becoming more attainable. This may be a result of younger families with higher incomes replacing older homeowners in the market.
- Despite the drop, about 20% of homeowners pay more than 30% of their income for homeownership.

The burden for renters is even more pronounced, although only about 5% of all housing units in Westwood Hills are rentals. About 25% of renters pay more than 30% of their income on gross rent.

- Westwood Hills rentals are unique and will continue to ask high rents for a specific market of renters. These renters may be high income households in transition or older high income households wanting less maintenance.

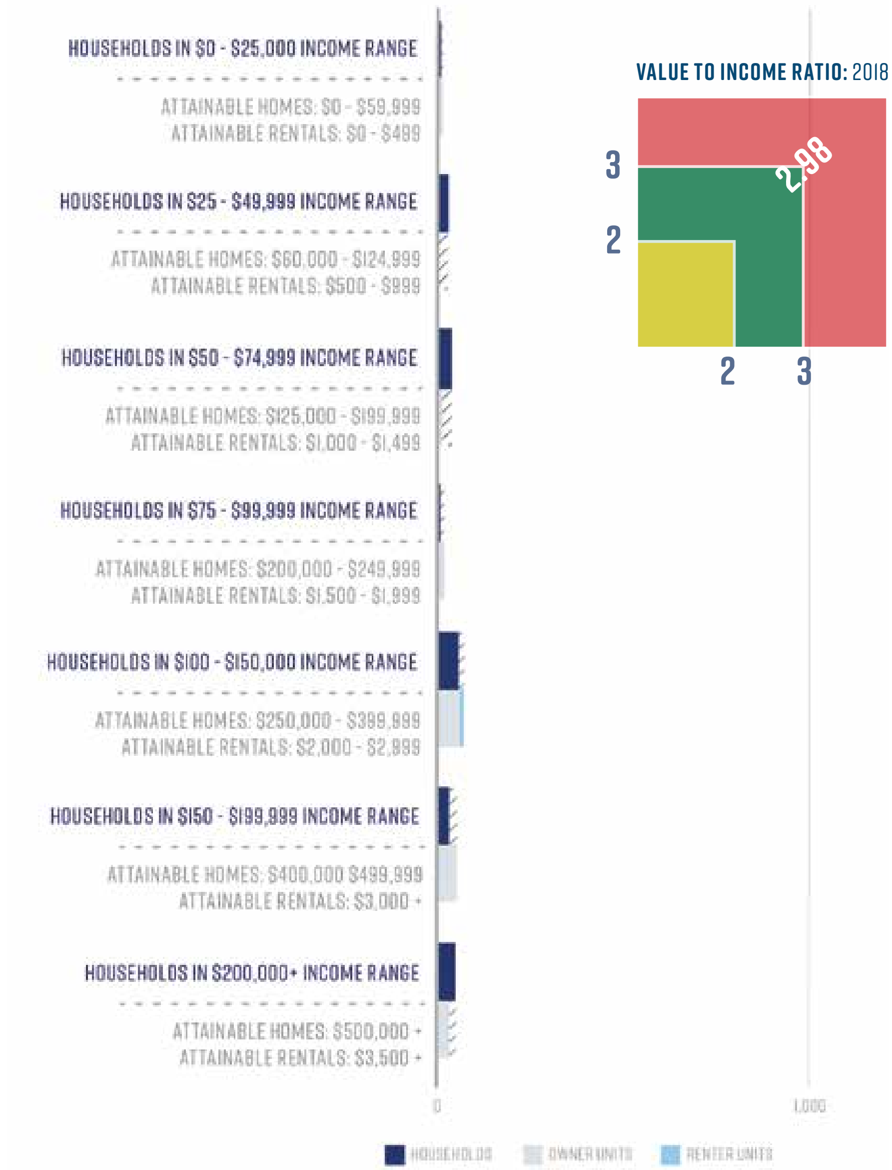
COMMUNITY PERCEPTIONS

A total of 56 residents took the community survey. Discussions also occurred with representatives of the Planning Commission and other stakeholders that have knowledge of the area around Westwood Hills.

ISSUES & OPPORTUNITIES

- The small community is a transition of neighborhoods into high end areas of the county. Developers are coming in and bidding out first-time homebuyers.
- Westwood Hills is a unique National Historic District community that is not meant to serve a variety of housing types and preferences. The historic character should be maintained.

FIGURE 6.18: HOUSING AFFORDABILITY, WESTWOOD HILLS



Source: American Community Survey (2018 5-year Estimates); RDG Planning & Design

SECTION THREE

A PATH FORWARD

CHAPTER SEVEN
STRATEGIC DIRECTIONS

The data, input, and analysis lead to several themes focused on issues to overcome and opportunities to leverage. While there may be more specific details for each city, these themes represent the most common themes spread throughout Johnson County.

HOUSING OPPORTUNITY THEMES

OPPORTUNITIES FOR INFILL DEVELOPMENT

Some cities have obsolete or underused sites served by infrastructure that are prime for redevelopment. Often these include: old commercial shopping centers, vacant industry, or churches closing because of less membership. While demolition and redesign of an infill site costs more to design, existing infrastructure can reduce costs for both the city and the developer. Additionally, the rise in property valuation will often pay the city back in a shorter time than new subdivision development.

"The revitalization of downtowns (such as old Overland Park) are creating better housing and business options..."

DEMAND FOR HOUSING VARIETY

There is not only demand from people that want to live in Johnson County, but many people living in Johnson County would like to move to new housing. From the community survey, over 40% of people living in Johnson County today would like to move from rental housing to an owner-occupied home, downsize to a different home, or move from their existing home to a larger home. Building a variety of housing units helps keep existing rental and smaller homes at manageable price appreciation and helps stabilize existing affordable units.

"A diversity of housing options is vital to supporting diversity in the community. Unique housing opportunities on a single street build networks across income, race and generation in a way that makes our communities more resilient..."

DESIRE TO AGE WITHIN COMMUNITIES

Many people that live in Johnson County want to remain living in their neighborhoods after retirement for many years. They may eventually need living options on one floor, accessible entrances, and accessible interiors. Communal options are also a popular for these households with shared lawns, gathering areas, or shared maintenance managed by the property manager. Infill lots are ideal for these arrangements where older households can move within their neighborhood and open up a their house for a new family.

"[My] top amenities - single-family home, 1,600 s.f. - snow and lawn care included, under 7,000 s.f. lot. [I] want to continue to be mobile - walk or drive."

HIGH-QUALITY HOUSING STOCK

Existing housing in Johnson County is well-kept on average in most cities, with few concentrated dilapidated areas. Lower quality areas are typically in older town centers and often fall within targeted rehabilitation program areas. Existing home are an essential asset because these homes will typically be the most affordable options in Johnson County compared to new construction that is a similar size and location.

HOUSING OPPORTUNITY THEMES (CONT'D)

CONTINUED DEMAND FOR RENTALS AT ALL PRICE POINTS

Aside from the smallest landlocked cities, there is demand and need for rental housing across many price points. People moving to Johnson County or new graduates will often need to rent first, and some must rent by necessity.

"Housing needs to be able to be afforded by teachers, social workers, police officers, nurses. College grads w/ student loans, car payments can't afford to live [here] on any of these salaries."

HIGHLY RESPECTED COMMUNITIES AND SCHOOLS

Growth in Johnson County is an effect of many economic and locational factors. However, the great school systems offer a significant force for housing demand. Not only schools, but communities in Johnson County also have many amenities that people desire and factor into choosing where to live.

"...raised our children here and love it! Great schools, parks, libraries, infrastructure, governance, and most of all great people."

LARGE JOB CENTERS WITH THE NEED FOR ADJACENT HOUSING

Johnson County is fortunate to have job and population growth. There are substantial expansion opportunities in light manufacturing, warehousing, white-collar office environments, and more. Many large employers locate on campus-like settings but recognize employee desires to live near their jobs. Development agreements for new job centers can leverage resources to incorporate housing development. Also, if office space demand decreases after the pandemic, converting office space to living space could be another way to add housing options.

"Low-wage workers in the area can not find housing close to their jobs."

LAND AND TRANSPORTATION OPPORTUNITIES THAT SUPPORT INNOVATIVE HOUSING PRODUCTS

Johnson County has a large amount of land yet to be developed. Some obviously should be reserved for flood protection, steep slopes, greenways, parks, and open spaces. However, near the Interstate system offers areas to try new housing products where traditional single-family development is less desirable to the market, such as near rail lines and areas closest to the Interstate.

"JoCo does not have adequate public transportation, once that infrastructure can be improved upon then developments to house the workforce that uses that transportation should be supported."

HOUSING CHALLENGE THEMES

ATTAINABLE OPTIONS FOR RESIDENTS TO AGE WITHIN THEIR COMMUNITIES

Home appreciation and the overall number of the baby boom generation reaching retirement and beyond creates tough decisions for many older households. Competition for accessible homes with no stairs and maintenance provided is high. Most facilities in Johnson County are luxury price ranges out of reach for many. These homeowners face staying in their existing homes to retain their long-time community relationships or moving out of the county to more affordable options.

"We would love to stay in old neighborhood but maintenance provided opportunities are just not here or too high priced for many. Town homes for rent or buy may be a solution for seniors."

LIMITED HOUSING VARIETY - LACK OF "MISSING MIDDLE" HOUSING

Housing construction permits county-wide show a dominance of traditional single-family development and large apartment development. While some cities have a large portion of townhouse type development, there are significantly fewer 3-12 plex type developments (owner or renter). These are ideal products for first-time homebuyers, short and long-term renters, and empty nesters currently occupying 3-4 bedroom lower-priced homes.

"Johnson County needs “missing middle” housing: duplexes, townhomes, small and mid-size apartment developments, etc."

SLOWER RETURN TO BUILDING

Large cities like Overland Park, Olathe, and Lenexa are building homes at record highs annually. Other communities have yet to see record numbers. However, the market indicates that it is a matter of time as Gardner and Spring Hill are rapidly building out with De Soto and Edgerton next in line if barriers like lot availability and infrastructure are addressed.

HOUSING CHALLENGE THEMES (CONT'D)

LIMITED ADVOCACY FOR HOUSING VARIETY

Public meetings for multi-family housing projects in most cities are characterized by the public voicing opposition to the projects. However, recent engagement in cities during long-term comprehensive planning processes shows support for attainable housing. The many voices in support of housing variety need to make their presence known to local decision-makers, like those heard in the community survey and listening sessions during this study. City staff cannot speak for them.

"Find a way to provide housing for those who work in the County. But it must recognize ... neighborhood preconceived ideas about "higher density housing." You can't make it affordable without either public subsidies or higher density..."

LIMITED SUPPLY OF FIRST-TIME HOMEBUYER OPTIONS

Homeownership is not for everyone. However, many people want to buy a home but are restricted by available options that meet their price point, which generally is below $250,000. Results are people renting for longer than they would like, living with someone else to save, or moving to another county with more attainable housing.

"Very difficult to break into the market for first time home buyers. The market is extremely competitive."

LACK OF CONSISTENCY IN REGULATIONS AND THE BASIC GROUND RULES

Developers voice a notable difference in approval processes from city to city. There are some cities easier to develop in than others. What developers all want are clear rules upfront and cities to stick to those rules through the approval process.

"Zoning laws make infill housing very difficult"

UNSEEN HOMELESSNESS

Many do not realize the effects that housing prices have already taken on many households in Johnson County. Homelessness is present, even though many of these homeless have jobs. The cost of rent and other essential needs is high enough to price some households out of reliable options. These populations are increasing in Johnson County.

"I would like to see a program to help homeless, working poor, be able to obtain housing and get back on their feet. Like Habitat for Humanity but extended."

HOUSING TASK FORCE – A PATH FORWARD

The housing assessment for Johnson County was never meant to be only an assessment of market data and identification of gaps in the housing market. The assessment is to identify the target housing programs that can address the housing challenges. That starts with this Chapter.

Taking the strategies forward is a Housing Task Force that includes more than 200 stakeholders throughout the county. Housing solutions will look different depending on the municipality and the Task Force will be there to help meet these varied needs. The Task Force will begin meeting in early 2021 to refine a strategy toolkit to activate the housing strategies in each city and county-wide. The membership includes:

- Community Leaders
- City and County Elected Officials
- City and County Administrators
- Educators
- Employers
- Developers
- Impacted Residents
- Health Care Providers
- Social Service Providers

Figure 7.1 on the next page shows the preliminary schedule for the Task Force, along with the topics to be covered.

Clip from the virtual UCS Human Services Summit in 2020

FIGURE 7.1: HOUSING TASK FORCE PRELIMINARY SCHEDULE

UCS HOUSING FOR ALL

REMOVE THE BARRIERS

PROCESS DIAGRAM

Task Force Leadership | Perspective Panel Members | UCS Board, HEN, Council of Advisors, MARC

Task Force Membership

TASK FORCE COLLABORATIVE

Task Force Leadership
Multi-Sector Perspective Panels
UCS Board
Healthy Equity Network (HEN)
Council of Advisors
MARC

TASK FORCE LEADERSHIP

MULTI-JURISDICTIONAL & SECTOR

Technical Support Committee
Healthy Equity Network Leadership Team

PERSPECTIVE PANELS

MULTI-SECTOR

Educators
Developers
Healthcare & Social Service Providers
Employers
Residents
Community Leaders

PERSPECTIVE PANELS BREAKOUT

Market Realities - Reduce Costs & Share Risk
Moving People from Not In My Backyard (NIMBY) to Yes In My Backyard (YIMBY)
Preserving Existing Attainable Housing & Choice
Addressing Socio-Economic Challenges

1 WORKSHOP	2 WORKSHOP	3 WORKSHOP	4 WORKSHOP	TASK FORCE LEADERSHIP MEETINGS 1 & 2	5 ROLLOUT
Wednesday January 20, 2021 7:00 - 9:00 p.m.	Wednesday February 10, 2021 7:00 - 9:00 p.m.	Wednesday February 24, 2021 7:00 - 9:00 p.m.	Wednesday March 10, 2021 7:00 - 9:00 p.m.	April 2021	May 2021
PURPOSE: Share Knowledge & Take a Deeper Dive into Barriers	**PURPOSE:** Vision & Goal Alignment; Dissecting Issues	**PURPOSE:** Breaking Down Barriers & Seizing Opportunities	**PURPOSE:** Loading Up the Toolkit & Aligning to Vision	**PURPOSE:** Develop Draft Healthy Housing for All Strategy & Toolkit	**PURPOSE:** Celebrate! Roll Out Strategy & Toolkit; Activate Strategy
MATERIALS: ▪ Participant Guide ▪ List of Participants by Perspective Panels ▪ Link to Housing Study ▪ EnRICHLY Guide ▪ Meeting Agenda Playbook	**MATERIALS:** ▪ Summary Meeting Notes from Previous Meeting ▪ Link to Vision and Goals Questionnaire ▪ EnRICHLY articles ▪ Meeting Agenda Playbook	**MATERIALS:** ▪ Summary Meeting Notes from Previous Meeting ▪ Link to Values and Strategies by Goal Area Questionnaire ▪ EnRICHLY articles ▪ Meeting Agenda Playbook	**MATERIALS:** ▪ Summary Meeting Notes from Previous Meeting ▪ Link to Potential Tools and Game Changers Questionnaire ▪ EnRICHLY articles ▪ Meeting Agenda Playbook	**MATERIALS:** ▪ Draft Strategy and Toolkit	**MATERIALS:** ▪ Summary Meeting Notes from Previous Meeting ▪ Healthy Housing for All Strategy and Toolkit (Draft) ▪ Best Practices Guide for Activating the Toolkit
AGENDA ▪ Share Housing Study Results ▪ Share Draft Vision and Goals from Housing Study ▪ Deeper Dive – Break into multi-sector Perspective Panels by topic area to discuss barriers and opportunities ▪ Share Outcomes – Each group shares top three takeaways	**AGENDA** ▪ Storytelling - Impact of Barriers ▪ Vision and Goals Questionnaire Results ▪ Deeper Dive – Break into multi-sector Perspective Panels by topic area to dissect barriers and focus on results ▪ Share Outcomes – Each group shares top three takeaways	**AGENDA** ▪ Success Stories Presentation ▪ Values and Strategies Questionnaire Results ▪ Deeper Dive – Break into multi-sector Perspective Panels by topic area to explore and evaluate potential strategies ▪ Align vision, values, goals, and strategies ▪ Share Outcomes – Each group shares top three takeaways	**AGENDA** ▪ Success Stories Presentation ▪ Potential Tools and Game Changers Questionnaire Results ▪ Deeper Dive – Break into multi-sector Perspective Panels by topic area to define potential tools, baby steps, and game changers ▪ Share Outcomes – Each group shares top three takeaways	**AGENDA** ▪ Share draft Strategy and Toolkit ▪ Determine if there are any items missing or in conflict ▪ Break ideas and tools into cohorts ▪ Finalize format ▪ Finalize Deliverables: Draft Healthy Housing for All Strategy and Toolkit	**AGENDA** ▪ Healthy Housing for All Strategy and Toolkit Presentation ▪ Activate Strategy – Break into goal areas and discuss activation strategy and sign-up for action meet-ups ▪ Share Outcomes – Each group shares top three activation ideas **FOLLOW-UP** ▪ Final Strategy and Toolkit ▪ Activation Strategy ▪ Post-Process Evaluation Form

Source: Shockey Consulting

STRATEGIC MARKET APPROACHES

The information in the previous chapters indicates the market is not providing for several needed housing products. Understanding the housing gaps means little without a plan to address them. The past shows the market itself is not trending to fix these gaps. Therefore, this chapter's strategies explore how local governments, organizations, builders, and other partners can work together to meet all the housing needs in Johnson County.

MARKET INFLUENCES

As discussed in Chapter 1, many market forces influence the housing market. Many forces are outside of local control, such as the cost of lumber to build homes. The strategies in Chapters 7 and 8 focus on policies, actions, and incentives that local governments and organizations can use to influence or help offset the housing market's inefficiencies. A few examples include:

- Pooling resources and funding mechanisms to encourage housing products that are otherwise difficult for the private market to produce.
- Managing the cost of housing projects intended for entry-level owners.
- Ensuring reliable regulations that are consistently applied to every type of project. This provides certainty to builders when undertaking new products.

STRATEGY GOALS SUMMARY

It is important to note there is no silver bullet to all aspects of the housing market. For example, actions in Kansas City and adjacent counties will always influence the housing market throughout Johnson County. Further, elements of the housing market, such as high-end housing products, do not require policy interventions for more supply. The market is producing them today.

APPLYING THE GOALS

Adopting policy to apply the goals and strategies in Chapter 7 and 8 should also be mindful to incorporate:

1. Environmentally friendly approaches to design, a high value to many cities. Sustainability initiatives are already taking place across the county. See the resources in the sidebar on the right.
2. Connections between incentives and projects that create attainable housing or address specific needs for the county or respective city.
3. Design of housing projects that does not overly strain city infrastructure capacity and fiscal ability to maintain public services in the future.
4. Partnerships with other organizations and the private market. It should not be the full responsibility of a city or the county to take on all the risk in housing programs. The Task Force will help address creating these partnerships.
5. The recommendations and guidance of the Housing Task Force for the county or respective city.

Sustainable Design: Current Resources and Initiatives

Bridging the Gap: bridgingthegap.org

Climate Action KC and Climate Action Plan: www.marc.org/Environment/Climate-Action

U.S. Green Building Council, Central Plains: www.usgbc.org/chapters/usgbc-central-plains

Metropolitan Energy Center: metroenergy.org/resources

The Center for Sustainability at JCCC: www.jccc.edu/about/sustainability

American Institute of Architects, Kansas City Chapter: aiakc.org

American Planning Association, Kansas City Section: kc-apa.org

KU's Center for Compassionate & Sustainable Communities: ipsr.ku.edu/compassion

Johnson County Government, Office of Sustainability: www.jocogov.org/environment/sustainability-johnson-county

Center for Community Health and Development at the University of Kansas: communityhealth.ku.edu

GOAL 1. ESTABLISH/CREATE/DEVELOP A NETWORK OF HOUSING ADVOCATES

Tools:

6. Develop and Manage a Housing Fact Book
   - › Housing communication
     - » Local advocacy
     - » Terminology - Relate housing to people

GOAL 2. CREATE MECHANISMS TO SHARE RISK

Tools:

1. Public/Private Partnerships
   - › Existing partnerships
   - › Trust funds
   - › Lending consortium
   - › Housing Development Fund
   - › Community Housing Bond
2. Non-Profit
   - › Develop or identify a non-profit developer
3. Reducing Site Costs
   - › Shared cost
   - › Special assessments
   - › Subordinate payments
   - › Infrastructure standards

GOAL 3. PRESERVE AND REHABILITATE EXISTING ATTAINABLE HOUSING

Tools:

1. Expanding Program Options
   - › Purchase Rehab Resale program for owner and rental units
2. Continue Existing Programs
3. Market Existing Programs
   - › Rental rehabilitation programs
   - › First-time homebuyer rehab programs
   - › Non-city/county programs
   - › Promote design guides for code requirements and energy efficiency programs

GOAL 4. INCREASE THE VARIETY OF PRODUCT TYPES, ESPECIALLY IN MIDDLE-DENSITY

Tools:

1. Rethink Neighborhood Design
2. Infill Development
3. Allow More Housing Products By-right in Residential Zoning Districts
4. Proactively Target Missing Middle-Density Housing Products

GOAL 5. REMOVE CODE UNCERTAINTIES IN THE DEVELOPMENT PROCESS

Tools:

1. Streamline Approval Procedures
2. Prepackaged RFPs and Site Plans
3. Small Lot, Townhome, Middle-Density Product Demonstration

GOAL 6. PRIORITIZE FUNDING/INCENTIVES FOR ATTAINABLE HOUSING ADJACENT TO JOBS AND TRANSPORTATION

Tools:

1. Leverage All Risk-Sharing Tools in This Chapter with Housing Goals to maintain the attainability of the existing stock and new housing opportunities.

GOAL 7. CONNECT EXISTING HOUSING RESOURCES (INCLUDING HELP FOR OTHER EXPENSES) AND FILL GAPS LEFT BY THE PRIVATE MARKET

Tools:

1. A One-Stop Database for Housing Programs
2. Leverage Housing Partnerships

Figure 7.2 shows the situations where strategies to address these goals can have the most significant impact.

FIGURE 7.2: HOUSING GOALS APPLICABILITY

GOAL	POLICY TARGET HOUSING PRODUCT	TARGET HOUSING PRICE POINT	CITY OR LOCATION CONTEXT
1. ESTABLISH/CREATE/DEVELOP A NETWORK OF HOUSING ADVOCATES	All products, especially middle and higher density rental options	Various price points, moderate market rate preferred as targets because of their increased risk for builders.	Most applicable to fastest growing cities and areas of major redevelopment
2. CREATE MECHANISMS TO SHARE RISK	All products that meet the needs in this assessment	All price points acceptable. More policy incentives for homes under $250,000 and rents under $1,000. Deferred loans and developer paybacks more appropriate for higher price points that meet a product gap.	All cities and all locations outside of environmentally sensitive areas. Incentive policies reserved for areas contiguous to existing development and/or mixing of housing types
3. PRESERVE AND REHABILITATE EXISTING ATTAINABLE HOUSING	All products, especially single-family homes built before 2000	Focus on homes priced under $250,000.	All cities based on recommendations in Section 2
4. INCREASE THE VARIETY OF PRODUCT TYPES, ESPECIALLY IN MIDDLE-DENSITY RANGES	Townhomes, patio homes, multi-plexes, co-housing, Accessory Dwelling Units	All price points, focus toward moderate to market rate rents and home price points.	For landlocked cities - opportunities in redevelopment site. Other cities incorporated into new subdivisions and infill development.
5. REMOVE CODE UNCERTAINTIES IN THE DEVELOPMENT PROCESS	All products	Various price points.	Applicable to all cities
6. PRIORITIZE FUNDING/INCENTIVES FOR ATTAINABLE HOUSING ADJACENT TO JOBS AND TRANSPORTATION	Focus on rental options	All price ranges, but target mixed-income developments with a portion of rents under $1,000.	Cities on the Interstate or section arterial street systems; Logistics Park Kansas City Intermodal Facility
7. CONNECT EXISTING HOUSING RESOURCES AND FILL GAPS LEFT BY THE PRIVATE MARKET	N/A	Below market rate housing prices and rent; Below median household income levels.	All cities and all locations

CHAPTER EIGHT
HOUSING STRATEGIES

STRATEGY FOCUSES

The strategic directions for Johnson County and its communities is an incremental strategy based on a toolbox of programs and policy interventions for use as a coordinated effort county-wide and by individual cities based on their context. Figures 8.3 and 8.4 at the end of the chapter summarizes the array of programs to meet the housing goals.

I. OVER-ARCHING GOAL - ESTABLISH/CREATE/DEVELOP A NETWORK OF HOUSING ADVOCATES

OBJECTIVES

1. Publicly display support of housing projects and understanding of the needs.
2. Open more community communication with elected and appointed officials.
3. Help balance community desires with a variety of quality housing products.

The 4,615 community surveys and conversations with stakeholders during the housing assessment made it clear that many people understand the housing needs and support projects to address the needs. Even within the group conversations, new connections were made between non-profits and organizations working toward the same housing goals in their community. Connections are crucial and already prevalent throughout Johnson County. However, these connections must be paired more consistently with advocacy.

TOOLS: DEVELOP & MANAGE A HOUSING FACT BOOK

The advocacy starts by creating a common framework of housing development facts. There is not a common understanding of the cost of development and how that affects housing prices. Additionally, there are misconceptions that certain housing products cause crime, deterioration, and lower property values. A start for such a fact book will be refined by the Housing Task Force. It should be a piece widely used by realtors, elected officials, citizen groups, and others when advocating for housing programs, products, and location. Topics include:

- Prototypical development proforma for different housing products, showing the profit margins and gaps in financing.
- Design examples of density ranges, using products in Johnson County as examples.
- Prototypical factors affecting property tax rates.
- Cost comparisons of infrastructure for low-density housing development (3 units per acre and under) versus medium density housing development (5-12 units per acre).
- Demographics of renter-occupied households in the County or City, taken from the U.S. Census or other sources.
- City by city goals statement and long-term actions related to housing in their strategic and comprehensive plans.
- Crime data by housing type, area, occupancy, income, and housing costs.
- Housing development impacts on transportation.
- Household size and the number of children in households.
- Others can be added over time.

Fact book Terminology:

Housing should be discussed and presented in a way that relates to people's lives. This means framing how we talk about housing in staff reports, presentations, developer communication, realtors with clients, and public policies. For example,

"The project will provide space for 30 teachers and nurses and their families."

See more in the Appendix

TOOLS: HOUSING COMMUNICATION

Local Advocacy. Advocacy on the ground includes the development of a network of housing advocates in all communities that will attend public meetings and be a voice for housing diversity. People advocating for housing is a primary reason for the commission of this assessment. The Housing Task Force starting in 2021, will likely be the network to sustain advocacy in the future through a county-wide coordinated effort.

State Advocacy. The Housing Task Force can be the leading organization to lobby for State level changes to housing policy. Several statutes in the State of Kansas preempt cities from undertaking certain actions that would help advance the strategies of this study.

- **Prohibition of Local Ordinances Requiring Inspections of Private Residences.** This includes interior inspections. Overland Park does have an exterior inspection program. For local cities, this prevents action to proactively stop property deterioration and protect renters from unsafe conditions.
- **Prohibiting Rent Control or Control of Real Estate Purchase Price by Political Subdivisions.** In the context of recommendations in this study, the statute does not allow cities to require certain price points for homes or apartment units within a development agreement. Incentives would allow for such projects.

TASK FORCE COLLABORATIVE

Task Force Leadership
Multi-Sector Perspective Panels
UCS Board
Healthy Equity Network (HEN)
Council of Advisors
MARC

TASK FORCE LEADERSHIP

MULTI-JURISDICTIONAL & SECTOR

Technical Support Committee
Healthy Equity Network Leadership Team

PERSPECTIVE PANELS

MULTI-SECTOR

Educators
Developers
Healthcare & Social Service Providers
Employers
Residents
Community Leaders

PERSPECTIVE PANELS BREAKOUT

Market Realities - Reduce Costs & Share Risk
Moving People from Not In My Backyard (NIMBY) to Yes In My Backyard (YIMBY)
Preserving Existing Attainable Housing & Choice
Addressing Socio-Economic Challenges

Source: Shockey Consulting

Task Force Agenda

Workshop #1:

Share Knowledge & Take a Deeper Dive on Barriers

Workshop #2:

Vision & Goal Alignment; Dissecting Issues

Workshop #3:

Breaking Down Barriers & Seizing Opportunities

Workshop #4:

Loading Up the Toolkit & Aligning to Vision

Leadership Meeting:

Develop Draft. Healthy Housing for All Strategy& Toolkit

Roll Out & Activation:

Celebrate! Roll Out Strategy & Toolkit and Activate Strategy

Affordable Housing Fund - Grand Rapids, MI

The city of Grand Rapids set an aggressive policy target for a citywide inventory of 30% affordable housing units. One tool created to help with the effort is an Affordable Housing Fund leveraged by dedicated city revenues, private contributions, and interest earnings. Additionally, a board provides recommendations for policy changes and managing allocations. Funds come from:

- City appropriations from tax growth.
- Private contributions, State funds, County, other grants.
- Excess revenues from General Operating Fund.

Eligible applicants include non-profits and for-profit affordable housing developers, and public housing authorities. Individuals are eligible for homeownership financial assistance. Fund allocation is used only for situations that meet city needs like mixed-use development, projects with other funding sources, and small scale development.

https://www.grandrapidsmi.gov/Government/Programs-and-Initiatives/Housing-NOW

Lawrence, KS has a similar fund where the public approved a sales tax increase for a new housing fund. The fund supports the acquisition, rehabilitation, and development of affordable housing. Over the next 10 year the fund expects to raise $10 million.

2. GOAL: CREATE MECHANISMS TO SHARE RISK

OBJECTIVES

1. Successfully increase the availability of a variety of housing products/types.
2. Increase the financial ability of builders and developers to try different housing products that are attainable for more households.
3. Encourage lower purchase prices of homes by reducing the cost of lots and site development.

TOOLS: PUBLIC/PRIVATE PARTNERSHIPS

Housing Development Fund. Such a fund could be in many forms. Sometimes the city holds the fund and others are under a separate organization. Two ways to fund include:

- Developers either provide some affordable units or pay a fee into a fund to support affordable housing or other product types that cannot make a profit.
- Thinking of housing just like we have for economic development funds to build business parks and industrial sites – cities devote funds annually to housing endeavors. Funds could come from a small fee for all public and private new investments, from highways to commercial to new housing, that could help support recommended strategies in this chapter.

Trust Fund. A housing trust fund provides a source of seed capital, unconstrained by program regulations, for a developer or non-profit developer to develop needed housing types. The popularity of trust funds can be attributed to their inherent flexibility. For Johnson County, these dollars could be for:

- Support construction of new entry-level housing products generally priced under $250,000.
- Rehabilitation of existing owner and rental housing for lower price points or lower-income families.
- Development of attainable rental housing options, which could include mixed-income developments.

- Construction of any of the targeted under built housing products in this study.

Support may include gap financing or even direct incentives to developers for the development of target market projects. Trust funds receive funds in several ways, including the dedication of a specific share of local option sales tax, fees, local revenue bond issues, grants, and charitable contributions. Through charitable contributions to a trust fund, employers could play a vital role in housing quality and choice.

Forming Partnerships. The role of existing partnerships at the city, county, and organization level like United Community Services, are invaluable to housing initiatives today and the work moving forward through the Housing Task Force. The role of other partners in the Task Force like realtors, builders, and developers will be as the contractors, marketers, and when appropriate, as financial partners for new policies and programs.

- **Major employers** (private & public) have jobs available, and companies are ready to expand. One way to help attract the workforce is attractive communities and attainable housing options. Employers know this and locate where there is housing or adequate transportation to housing. Employers can and should play an active role in housing partnerships.
  - › Rent subsidies and down payment assistance for employees residing within Johnson County or their respective cities. Some employers in other regions in the Midwest operate a housing plan, much like a 401(K) plan. The employer provides a matching contribution for a down payment on a home within the community or a specific part of the community.
  - › Marketing local housing opportunities, including rental and ownership options, rehabilitation, or first-time home-buyer programs.
  - › Daycare assistance or provision, or other necessary living expenses
  - › Direct investment in housing development where their employees can get a discount on housing in the development.
- **Realtors**, in particular, play an essential role in a housing partnership that involves informing builders, cities, and chambers on the preferences of buyers. Realtor's secondary role involves marketing new housing, or rehabilitated homes, to potential residents and working with employers to match recruits with housing that fits employees' needs.
- **Builders and developers** have the vital role of building new housing products not being produced in the market today. Of course, they cannot be expected to take on all the risk of such projects without ensuring that profit can be made. However, they must be willing to come to the table and build high-quality products designed for incorporation into neighborhoods and meet the city's goals, which may mean agreeing to certain price points.

Housing Incentives at Saint Louis University

Saint Louis University has provided a housing benefit to its employees through an Employer Assisted Housing Program (EAHP). The EAHP provides three benefits for the University employees:

- Housing information and education on home ownership.
- When available, preferred rates and reduced closing costs on mortgage and refinancing costs through partnering institutions.
- When available, forgivable loans for eligible employees, applicable towards the purchase of a new home located in designated areas.

This program applies to all current, full-time faculty and staff members. Properties eligible for the forgivable loan program must be located with specific revitalization areas. In the SLU program the percentage of the loan that is forgiven increases with the number of years of employment after origination of the loan, up to 100% of the loan after five years of employment.

Housing Bonds, Greensboro, NC

In October 2016, Greensboro put to vote a $25 million bond project to fund the purchase, construction, and improvements to housing for low to moderate households. Projects include housing or neighborhood revitalization programs or providing loans and grants to individuals, developers, or other organizations for both single and multi-family projects. The bonds are projected to leverage $54 million in investments on 1,007 housing units.

Projects include:

- Development or buyer assistance for 320 units of workforce housing.
- Code compliance repair through a revolving load fund for 120 repairs with property liens.
- Handicapped accessibility improvements for 80 units.
- 27 new supportive housing units targeted to homeless/disabled/veterans.
- Revolving loan fund for 50 low income homebuyers.
- 150 units of heating systems, lead-based paint, health hazards and emergency repairs.
- 150 affordable multi-family units.
- 30 owner-occupied home rehabs.

Lending Consortium. A cooperative, private sector venture among lending institutions active in the Johnson County housing market to spread their risks. The consortium could work alongside the trust fund or with other partnerships and distribute reasonable risk in such a way that no one institution is over-exposed. For Johnson County, this may just be a matter of growing the existing relationships that can be established through a Housing Task Force. The objective and directive is to:

- Provide short term financing or "patient financing" for builders and contractors in communities, especially for non-traditional projects that the private market avoids and federal lending mechanisms do not support.

Community Housing Bonds. Some cities initiate a bond issue to fund housing projects. The bonds require a vote by the community and, if passed, show clear support for project approval. For Johnson County cities, a housing bond should be used for creating attainable units for both owners and renters. This may include the development of infrastructure to support housing.

TOOLS: NON-PROFIT

Develop or identify a non-profit developer.
Sometimes there needs to be an entity that produces or preserves housing in ways that the private market cannot succeed. Typically, the action falls to housing products at price points well below the market rate. There are different ways that such an organization could form. Johnson County has several potential organizations that could be recognized, but with limited capacity or experience. Often, these are formed as community housing development organizations (CHDOs), which provide them with additional access to state and federal dollars.

An economic development corporation could achieve similar goals as a CHDO:

- Operate as a private developer and with the same permanent expertise and adequate capitalization as a private enterprise.
- Can also focus on existing housing. Specifically, buying low-quality houses, completing major rehabilitation, and selling them to new owners.
- Uses financing primarily from private donations and leverage from a lending consortium. Funds focus on generating working capital for the organization from many lenders.

Housing Next - Ottawa County, MI

Housing Next was formed as a 5-year pilot initiative to work closely with local units of government, developers and non-profits to remove barriers to the creation of more housing supply at all price points.

It is an independent organization, not a non-profit, acting as a middle person to navigate resources and connect developers with projects. It is nested within the structure of the Greater Ottawa County United Way and funded by the community foundations of Holland/Zeeland, Grand Haven and private donors in Ottawa County. Some of its initiatives include:

- Evaluate local zoning standards to find ways to reduce regulatory barriers
- Works with developers to find available land, assemble preliminary development plans that align with a community master plan and seek out funding opportunities.
- Works with other non-profits and housing advocates to seek out long term funding mechanisms and organizational structures.

https://www.housingnext.org/

HN HOUSINGNEXT www.housingnext.org

Smart Growth in Kansas City.

The topic of smart growth and infrastructure burdens on city governments, housing costs, and the taxpayers is not new to the Kansas City metro. Past discussions and lecture have unveiled interesting data on how metro cities should prioritize funding in the future.

A lecture sponsored by the Mid-America Regional Council in October, 2019 titled *Smart Growth KC How? Where?* brought in consultants from Urban3 and Strong Towns to show fiscal impacts of infrastructure growth. The insightful presentation showed that much of the traditional subdivision growth is not fiscally responsible, with six times more infrastructure growth than the growth in population. Subsides are effectively built into infrastructure for large lot subdivisions. Or rather, the tax burden for all residents increases instead of only for those living in the large lot subdivisions. Instead, investing in existing neighborhoods first and more compact new development patterns can cover infrastructure costs and services.

View the presentation at https://kclibrary.org/signature-events/smart-growth-kc-how-where

TOOLS: REDUCING SITE COSTS

Reducing the cost to develop a site leads to lower lot costs and subsequently lower costs per housing unit when tied to incentives for including certain price points or housing products. Several methods are already used to some extent in Johnson County cities. Examples for developing new subdivisions include:

Shared costs. Cities can share new infrastructure costs depending on the development location and type. The public share might be from 30% to 50% of the construction cost for cities experiencing consistent subdivision development. Repayment is from the added property taxes created by new development. For Johnson County, cities and their partners should require these developments to include various housing types and smaller lots to balance future infrastructure maintenance and tax revenue. Lot variety and housing variety should also be allowed outright.

Special assessments. Special assessments are used to finance infrastructure. While assessments reduce the initial purchase price of the house, they are repaid through monthly payments and add to the monthly and overall cost of the house. Thus, special assessments are not useful tools to target the lowest income households but rather those that have adequate monthly funds.

The city could waive the special assessments on a certain percentage of lots o support more affordable housing. These households may have trouble saving for a downpayment because of student loans or high current rent costs. This tool requires working with the developer on the type and price of these units, likely below $250,000 to waive the special assessment.

Subordinate payments. A city front-ends a portion of public improvements, repaid over an extended period through a second mortgage on the property. This reduces payments over special assessments by extending the loan term and reducing the principal.

Infrastructure standards. Besides cost-sharing, a review of improvement standards should be made across city departments to ensure cost efficiency while retaining quality. Not all departments understand the impact that standards have on the price of housing. Like zoning ordinances, infrastructure standards and design possibilities change frequently but are often not updated regularly at the city level. Additionally, requirements are spread across many organizations that may conflict with each other such as utility providers, county government, and federal agencies. Beginning to evaluate infrastructure standards includes:

- Planning departments understanding how existing standards conflict with city policies.
- Understanding that city review processes and multiple reviews between departments cost money which is passed on to the cost of housing.
- A step further includes how building and fire code requirements align with housing products encouraged in certain zoning districts. For example, unit thresholds that trigger high-cost development requirements like fire sprinklers. (see case study: Prepackaged Site Plans).

3. GOAL: PRESERVE AND REHABILITATE EXISTING ATTAINABLE HOUSING

OBJECTIVES

1. Continue to maintain the most attainable housing in the county.
2. Make people aware of programs for housing conservation.
3. Target programs to strategic areas of most need or most opportunity.
4. Ensure cities adopt and implement both complaint-based and systematic minimum property maintenance code enforcement to prevent substantial deterioration of existing housing.

Good conditions in many areas of the county today are not guaranteed in the future. Monitoring and encouraging investment regularly should protect "naturally occurring affordable housing." In certain instances, protecting the existing housing in good condition from demolition through design standards may be necessary.

TOOLS: EXPANDING PROGRAM OPTIONS

Purchase Rehab Resale Program. Houses are acquired and sold in a rehabilitated or "turnkey" state to owner-occupants. It recognizes the limited number of prospective buyers who want to carry out a significant home rehabilitation project. The program works best when candidate houses can be purchased at relatively low costs.

Under the program, a CHDO or other non-profit developer purchases existing houses, rehabilitates them, and resells them to new home-buyers, often first time buyers. The lending community may participate cooperatively in this effort by providing interim financing. Mortgage financing for low- and moderate-income buyers may be assisted by CDBG or HOME "soft-second" loans. Realtors may also participate by reducing commissions on selected projects.

Depending on the funding sources this may require households to make 80% or less of the area median income (AMI). Using local dollars through a development fund can potentially broaden this to 80% to 120% of AMI. These households are much more likely to be bankable, and based on realtor input, have the most challenging time finding quality housing. There may also be the opportunity to expand the number of houses eligible for the program. This type of program could also be paired with the production of housing that is appealing to empty-nesters and retirees looking to downsize.

A similar approach can also be used for dated multi-family developments.

Neighborworks of Northeast Nebraska

Over a five year period NeighborWorks Northeast Nebraska has implemented a highly successful Purchase Rehab Resale program. Under the program a qualifying household identifies a home, an assessment of the home for structural stability is completed, followed by a NeighborWorks Northeast Nebraska purchasing the home to complete any repairs needed. Repairs can range from $2,000 to $25,000. Following completion of the repairs the home is sold to the qualifying household often with down payment assistance of 20% of the final purchase price, up to $20,000. For Columbus, Nebraska this has resulted in 140 homes being updated and owned, often by first time home buyers.

.http://www.nwnen.org/what-we-do/homeownership-assistance/purchase-rehab-resell-program

Bloomington, MN Housing Action Team for Naturally Occurring Affordable Housing

The partnership formed by the city and other organizations took the lead to identify apartment complexes for preservation and infill based on size, condition, proximity to transit and amenities. The team works to acquire NOAH apartments before private developers can. In one apartment complex acquisition, the team:

- Preserved 306 existing affordable units.
- Redeveloped a site via tax credit for rehabilitation and 172 additional new units.
- Established a maintenance plan which addresses critical health and safety issues
- Provided housing stability and long-term affordability for one of their most challenging multifamily developments.

Strategic Approach:

- Establish a project tracking team. Track all NOAH properties in Bloomington.
- Focus on the top 25 potential future sales.
- Engage in broader community partnerships.
- Develop engagement strategies to improve communication with owners and tenants.
- Pursue funding.

Rental rehabilitation programs. With little code enforcement in most cities and a tight rental market, there is often no incentive for rental property owners to make improvements. Rental rehabilitation programs should focus on workforce housing, providing leveraged loans combined with code enforcement.

- Rental rehabilitation must include both incentives and consequences to create a balanced "carrot and stick" based program. Therefore, effective housing code enforcement is the key to ensure that units meet minimum housing standards.
- Kansas State statutes limit the ability for cities to create rental inspection programs. State level advocacy described in Goal 1 should be pursued because rental inspection and registration programs can be effective. However, they are staff-intensive for smaller cities and must be administered in a way that avoids displacing low-income households. Partnerships to share staff and defray costs are possible as a short-term solution as a city grows.

TOOLS: CONTINUE EXISTING PROGRAMS

There are many programs used in Johnson County cities today that are proven assets to meet housing needs. Each city should make sure to evaluate its programs for effectiveness regularly. That means:

- Setting up performance metrics with any program to measure success toward the program's intended goal.
- Allocating adequate funding streams for the program to be able to influence the intended goal.
- Restructuring criteria, reallocating funds, or eliminating the program for something else if metrics do not align with intended goals. Ideally, metrics are reviewed on an annual basis with a detailed program review every three years.

TOOLS: MARKET EXISTING PROGRAMS

Marketing existing repair programs, neighborhood clean-ups, and local trade resources for home maintenance needs should complement a consolidated resource for all the programs that exist today (see Goal 7). Programs to address housing needs mean little if people are not using them or are unaware that they exist.

Partnerships. Many of the partners described in this chapter have a role in telling residents about existing programs. Realtors are especially important as one of the first touch points for a new resident.

First-time homebuyer rehab programs. There are many examples where funds are allocated only to first-time homebuyers in no-interest loans or forgivable loans. Understandably, funds will not always go to households that need financial assistance. However, the program is still an incentive to trigger housing improvements or purchase older homes (that may sell at a premium), knowing that the costs for updates will be reduced. See the case study for the Des Moines, Iowa Neighborhood Reinvestment Program.

Non-city/county programs. Not every possible housing program in Johnson County is listed on a city website or even known by every city. A central database maintained by a group could be formed as a result of the Housing Task Force work. The database would connect organizers of programs, community members, those looking for help, and those wanting to help. See Figure 7.1.

Design guides. Marketing could include design guidance for homeowners and builders to understand ordinance requirements for quality neighborhoods and homes. An example could be guidance on the basics of energy efficiency for reduced utility costs or universal design applications for older households to age in place.

Figure 8.1 at the end of the chapter shows programs available throughout Johnson County today. The list comes from Internet searches of government websites. Other programs may exist but are not easy to find from a home computer without calling the local city.

4. GOAL: INCREASE THE VARIETY OF PRODUCT TYPES, ESPECIALLY IN MIDDLE-DENSITY RANGES

OBJECTIVES

1. Provide rental options beyond traditional apartments, including duplexes, townhomes, and accessory dwelling units.
2. Lower the risk for the development of under built housing products that fill local needs.
3. Include a focus on housing for missing middle incomes as well – those that do not qualify for low income programs but still have trouble affording market rate new housing.

Housing product gaps in the private market, especially "missing middle" housing types, require economies of scale to be profitable for many larger private market developers. While noted that the Kansas City metro does not have a development company that ranks in the top 50 in the U.S., smaller scale developers could play a crucial role in middle density housing.

TOOLS: RETHINK NEIGHBORHOOD DESIGN – DESIGN NOT DENSITY

Many pre-1940 neighborhoods were developed with a variety of housing types. The neighborhoods often had 4-plexes on corners, duplexes in the heart of a block, and accessory dwelling units scattered throughout a neighborhood. This mix of housing gave neighborhoods variety and character. The desire to add these options and use infrastructure more efficiently has many looking to add density to existing neighborhoods. For current residents, this raises many questions and concerns about what infill and redevelopment would mean to their neighborhood.

Infill development needs to complement the existing neighborhood's character and provide appropriate transitions where needed. Principles to consider with any infill development include:

- **Transitions.** Provide a transition between higher-intensity uses and lower intensity uses to address compatibility issues.
- **Scale.** The size and height of new buildings are in keeping with surrounding buildings or the neighborhood's context.
- **Context.** The design fits the housing styles around a site, even if the type of units are different. Other context variables on a site may include views that enhance the site or stormwater facilities add open space amenities.

Campbells Mixed Use Development - Lincoln, NE

Good examples in Johnson County today of design with density include:

- Townhomes east of Olathe West High School.
- The Townhomes at Buckley Court in Overland Park (15.38 dwelling units per acre).

Olathe Townhomes

Overland Park Townhomes

Olathe Townhomes

Overland Park Townhomes

"We need to find a way to provide housing for those who work in the County. But it must recognize the actual costs of construction or reconstruction and the zoning policies and neighborhood preconceived ideas about "higher density housing." You can't make it affordable without either public subsidies or higher density. That trade-off is not well understood."

- Survey Respondent

TOOLS: INFILL DEVELOPMENT

Free or Reduced-Cost Infill Development Lots. Most cities and not-for-profits organizations regularly can acquire property through estate gifts, tax delinquency, or property liens. This land must be maintained and likely best kept under a land bank (see sidebar). By offering free or discounted lots for new development, the total development cost is significantly less than in greenfield development and the city reaps the benefit of using its existing infrastructure while also directing investment to existing neighborhoods. This is different from investors buying older housing, demolishing, and rebuilding larger homes on the lot.

For strategic locations, cities, especially those that are landlocked or with older town centers, may choose to acquire multiple parcels to allow for a larger development project with a more significant impact. It may be appropriate to support the redevelopment of infill lots by using tax increment financing and only for missing product types identified by this housing assessment.

Infrastructure improvements. The rewards will often not outweigh the risks for the private market on a redevelopment site. Communities in the county will need to identify infill sites where they can aid in site prep, infrastructure up-sizing, and share some risks in developing new market rate residential units. Many of the tools in this chapter can apply. However, cities should annually plan for capital improvements targeted at infill sites, funded through TIF or general city funds.

Land banks are governmental nonprofit organizations that can acquire vacant, abandoned or dilapidated properties for renovation or demolition for future development.

Land banks are appealing because they allow for land assembly without the city having to hold and maintain properties. However, cities can sell the lots for projects than meet specified needs. It is crucial that the land bank is coupled with a steady funding source such as a lending consortium or devoted local funds.

Kansas State Statutes allow cities and counties to establish land banks, listing the requirements to do so. As of 2019, 24 cities or counties in Kansas have a land bank ordinance. Overland Park and Olathe have land bank ordinances in place but are not in active use. However, having the ordinance in place reduces the time to activate and begin forming the managing Board.

TOOLS: ALLOW MORE HOUSING PRODUCTS BY-RIGHT IN RESIDENTIAL ZONING DISTRICTS

If local officials and the public agree on the above principles as components of high-quality neighborhoods, local city ordinances should be amended to allow missing middle housing by-right in more districts. This does not mean through a Planned Unit Development (PUD). It means the same approval process as one and two-unit homes.

Understandably there will be more design criteria to review and for the developer to meet. However, reducing public hearing processes reduces risk for the developer and saves money on soft costs for attending and preparing for meetings. This should be combined with housing advocacy in GOAL 1 for rezoning processes. If neighbors come out and oppose a rezoning to any residential district, then the same issue persists. See also GOAL: Remove Code Uncertainties, Tool: Streamline Approval Procedures.

The Appendix includes a city zoning ordinance review checklist as the lowest hanging fruit for reducing attainable housing barriers.

TOOLS: PROACTIVELY TARGET MISSING MIDDLE-DENSITY HOUSING PRODUCTS

After amending codes and establishing design criteria, developers may still be leery of changing their building model. Therefore, the tools in this assessment should be leveraged as incentives and financing mechanisms targeting these missing product types.

Focusing on incremental development through pre-packaged sites allows some developers or non-profit organizations to create "missing middle" structures on a site by site basis. Gap financing or local assistance may be needed for a small scale project to pencil out for private market developers, along with zoning code adjustments for smaller lot size and higher density allowances. These types of projects are not new to cities in Johnson County. Still there are few in recent years as larger scale subdivisions and apartment complexes dominate the market (see GOAL: Remove Code Uncertainties in the Development Process).

4d Affordable Housing Incentive Program, Minneapolis, MN

The 4d program in Minneapolis is a good model of combining property tax relief and the preservation of naturally occurring affordable housing (NOAH) units.

The 4d program preserves affordable housing in Minneapolis by assisting apartment building owners with property tax reductions in exchange for their agreement to keep 20% or more of their rental units affordable for a minimum of 10 years. It also provides funding for energy efficiency improvements and solar installations. Affordability is defined as households making less than 60% Area Median Income (AMI).

Benefits to Property Owners:

- 40% tax rate reduction on qualifying units for 10 years.
- $100 per affordable unit grant (up to $1,000 per property).
- Payment of first year application fee for the Low Income Rental Classification ($10/unit).
- Free or low cost energy efficiency and healthy homes assessment.
- Cost share funding up to 90% of qualified upgrades for green energy upgrades. For Johnson County, this could be based on the new Climate Action Plan or other regional "green" initiatives.
- Priority for Solar Project funding up to $75,000 per project.

Requirements/Eligibility:

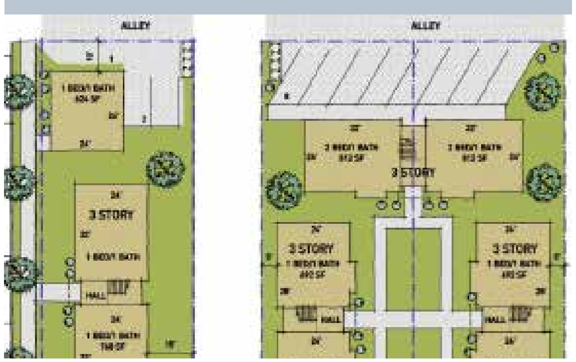
- Building must have at least 2 units.
- Can include owner occupant units, but those units are not eligible for 4d tax status.
- Property must not have rental housing license revocations or outstanding housing orders.
- Owner must record a 10-year affordability declaration that runs with the property.
- Annual income verification is not required but as units turn over, new tenants must have household incomes at or below 60% AMI.
- Must accept tenant based assistance (ex: Section 8 vouchers).

Missing Middle for Chattanooga, TN

With help from the Incremental Development Alliance, Chattanooga leaders and stakeholder undertook an intensive developer workshop to identify solutions for missing middle housing types. The process resulted in a development packet that lays the framework for a developer to pursue these projects including:

- Picking a building type based on the developer's financing options and site circumstances.
- Guides and site plans for good urban design amid traditional single-family neighborhoods.
- Technical considerations for packaging development applications.
- Bank packages for different building types to show how to bring the project to life by proving profits for lenders.

https://www.incrementaldevelopment.org/
https://www.cneinc.org/creating-homes



5. GOAL: REMOVE CODE UNCERTAINTIES IN THE DEVELOPMENT PROCESS

OBJECTIVES

1. Approve projects objectively and logically.
2. Decrease approval timelines for quality, community-driven projects that meet policies identified by the Task Force and adopted as a result of this study.
3. Update regulations for current city policies and needs.
4. Match zoning codes, building codes, and financing restrictions.

Each city will have different priorities to address in the regulatory framework. Matching zoning codes with what is financially feasible in building codes as well as for lending requirements is a first step. Zoning code amendments to allow different housing types will not themselves trigger more variety. However, mitigating these potential barriers upfront is a passive form of filling housing gaps.

TOOLS: PREPACKAGED RFPS AND SITE PLANS

Show developers what will get approved, reduce soft costs, and trigger investment. There are few developers building anything beyond single-family homes or large apartment/condo complexes. That is understandable because historical consistency in profits and evidence of past local approvals reduces the risk of a project falling through. By creating a package of example site plans and products that will get approved, a level of risk is taken off the builder. Cities or economic development organizations could go as far as to release Requests for Proposals (RFP) to develop assembled sites under specific criteria and standards. Both methods are straightforward ways to eliminate approval risks.

This also applies as technical assistance for less experienced local builders, investors, or community members interested in a community project. Edgerton or De Soto are good examples where community-driven investment may garner interest.

Small Lot, Townhome, Middle-density Product Demonstration. The housing assessment shows demand for housing construction and absorption. However, it may still be necessary to provide demonstration projects. This includes a non-profit leading development or the lending consortium providing financial assistance. Types of assistance include gap financing, infrastructure assistance, financial or tax assistance, and expedited permitting. However, there are also proven examples spread throughout Johnson County to point to for product success.

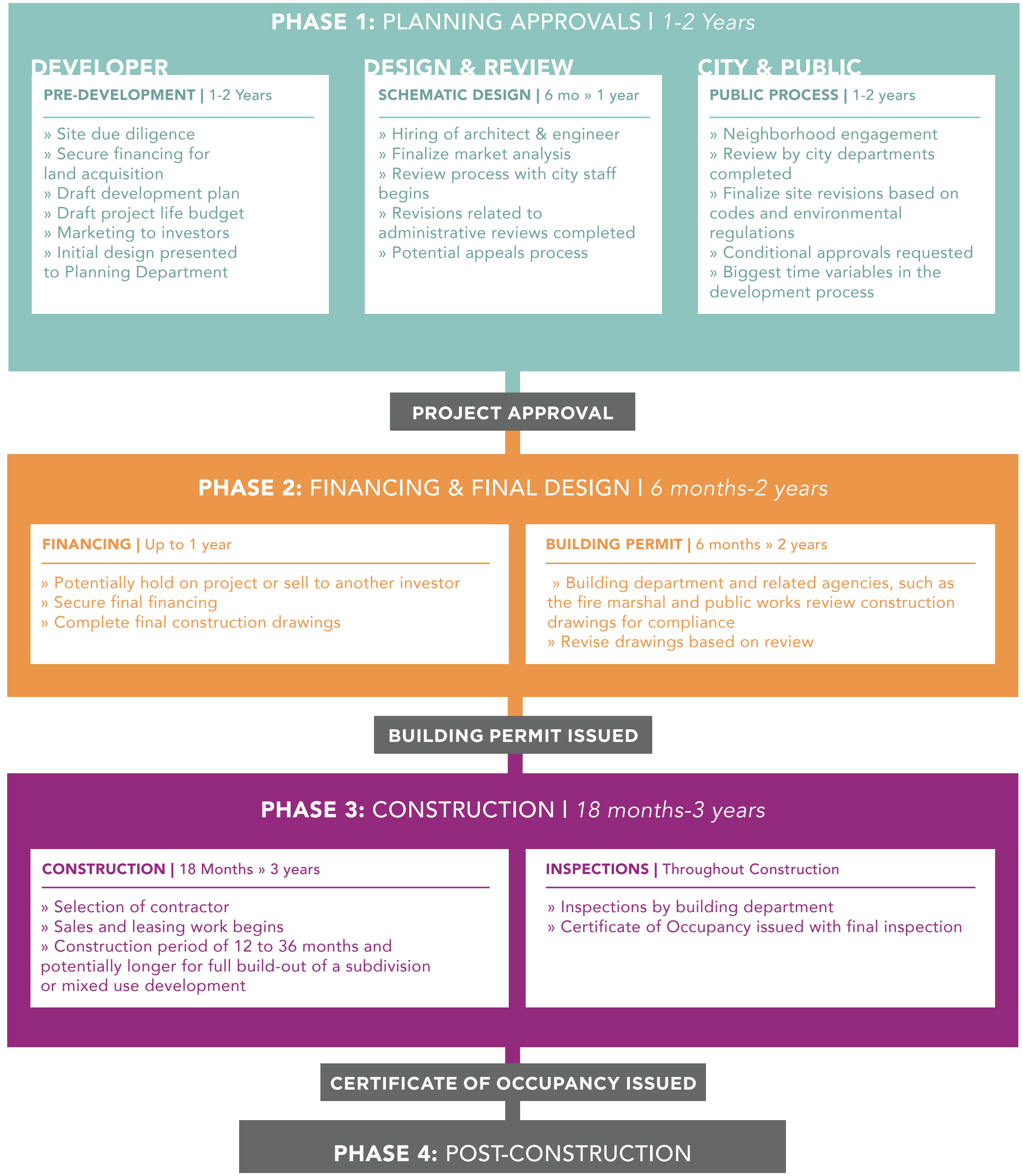
TOOLS: STREAMLINE APPROVAL PROCEDURES

There are ways to increase opportunities for administrative site plan approval. Especially when housing proposals meet a city's comprehensive plan goals and targeted housing needs. There should not be a question of public approval because the comprehensive planning process includes heavy public participation to frame the vision, goals, and actions for the city's future. Additionally, a well-structured and design-oriented zoning ordinance will prevent possible adverse effects of density, building mass, land use conflicts, and transportation. Exceptions include:

- The project requests an amendment to the comprehensive plan.
- The project requests a change to the zoning or subdivision ordinance.
- The project requests a rezoning.
- State or Federal law requires a public hearing because of specific funding or permit procedures.

Interdepartmental Coordination. Review of site plans is not only on the shoulders of planning departments. Many departments partake in review processes. Open communication between departments is critical for the success of efficient approvals (public works, engineering, stormwater, inspections). Better departmental communication means education on how departments impact housing costs and how to make changes without sacrificing public health and safety.

FIGURE 8.1: THE PROTOTYPICAL DEVELOPMENT PROCESS



6. GOAL: PRIORITIZE FUNDING/INCENTIVES FOR ATTAINABLE HOUSING ADJACENT TO JOBS AND TRANSPORTATION

OBJECTIVES

1. Help lessen the transportation barriers faced by lower-income households.
2. Make living in Johnson County more feasible for households with only one or no personal vehicles.
3. Create more sustainable neighborhoods and cities. Smart planning principles and sustainable design mean that neighborhoods use urban services efficiently, provide many transportation options, and preserve natural features. See the links in Chapter 7 on "Applying the Goals" for initiatives already happening in the region, best practices in sustainable design, and possible funding for these practices.

TOOLS: LEVERAGE RISK-SHARING TOOLS WITH HOUSING GOALS

As shown in Chapter 3, there are areas where more attainable housing will have greater influence on a household's ability to pay for housing. When adjacent to local employment and transportation options, households may not have to spend as much for owning a car and associated expenses. The result is more income available to devote to housing, which lessens the incentive or subsidy needed for the private market to produce housing at price points that meet attainable thresholds for people like teachers, nurses, and retail service workers.

Map 3.1 in Chapter 3 identifies how to apply tools for the greatest benefit for job and transportation access. For some cities, this may mean adjustments to zoning regulations to allow a broader range of housing types in more districts, subject to design criteria.

Examples include gap financing that gives a higher priority to projects that produce a needed product type in locations closer to transportation options or lot assistance on for smaller lot or mixed product types closer to jobs and transportation.

Opportunity Housing Ordinance, Bloomington, MN

In February 2019 the City of Bloomington passed the Opportunity Housing Ordinance requiring all new housing and substantial housing rehabilitation projects with 20 or more newly created units to offer at least 9% of units at affordable rates of 60% AMI or less[1]. The ordinance took several years to develop and included developers, affordable housing experts, and other stakeholders in the process.

To offset costs developers can use incentives and financing options like housing tax increment financing, land write-down, and project based housing vouchers. Incentives include:

- Density, Floor Area Ratio, and Height Bonuses
- Parking Reductions and Enclosed Parking Allowance
- Minimum Unit Size Reduction
- Alternative Exterior Materials Allowance
- Storage Space Reductions
- Landscape Fee In-Lieu Reduction
- Development Fee Reimbursement and/or Deferment
- Expedited Plan Review

The amount of incentives available to the project is directly correlated to the number of affordable units or the amount of affordability. Developers have the option of contributing land or money to the affordable-housing trust fund at a rate of $9.60 per square foot of market-rate housing they build.

www.bloomingtonmn.gov/oh/opportunity-housing-creation-and-preservation

1 For newly constructed or infill single-family detached residential developments with 20 or more new units, at least 9% must be affordable to households making up to 110% AMI.

7. GOAL: CONNECT EXISTING HOUSING RESOURCES (INCLUDING HELP FOR OTHER EXPENSES) AND FILL GAPS LEFT BY THE PRIVATE MARKET

OBJECTIVES

1. Ensure programs are fully accessible to households that need them most.
2. Ensure developers and builders know the resources available when creating their development proformas.
3. Encourage partnerships of resources and targeted programs.

TOOLS: ONE-STOP HOUSING PROGRAM DATABASE

There are many resources scattered throughout Johnson County that lead to fragmented efforts targeted at specialized solutions. Each city understandably has its own strategic plans and targeted programs that could be included in a central database of housing programs.

The database can also include a page for other financial assistance programs. Housing is typically the highest regular expense for a household. However, the cost of other necessities affects the price that can be spent on housing. For families, especially childcare, transportation, and school costs are a non-negotiable barrier to attainable housing options. Reducing these costs can increase housing options.

TOOLS: LEVERAGE HOUSING PARTNERSHIPS

As discussed under Goal 1, partner organizations in the county are a resource to inform people about housing programs. Habitat for Humanity has already made some internal strides to develop a central resource. Leveraging all the partner organizations, especially the Housing Task Force's work, ensures all programs are captured and actively reviewed and updated.

Grand Rapids Great Housing Strategies Toolkit

The City of Grand Rapids has made housing a forefront policy for the community. Much like this study and its Task Force follow up, Grand Rapids began their initiative with a robust community listening schedule. The efforts evolved into a series of focused work groups to develop policy and program recommendations. Work groups include:

- Land use and zoning
- Housing finance, economic
- Workforce development
- Low-income and vulnerable populations

The efforts are ongoing and have resulted in a Housing Strategies Toolkit listing all the available programs or initiatives in progress and what they will address.

https://www.grandrapidsmi.gov/Government/Departments/Community-Development/Housing-Rehabilitation-Program/Great-Housing-Strategies

FIGURE 8.2: HOUSING RELATED PROGRAMS IN JOHNSON COUNTY

CITY	PROGRAM	DESCRIPTION
EDGERTON	None found	
DE SOTO	None found	
FAIRWAY	None found	
GARDNER	Neighborhood Revitalization Area	The NRA offers tax rebates of 95% for 10 years on increased property taxes assessed as a result of property improvements within a specific geographical area
LEAWOOD	None found	
LENEXA	Neighborhood Revitalization Area	Area where the program below applies
	Exterior Grant Reimbursement Program	Partially reimburses for architectural, construction and material costs for your improvements or new construction. The applicant must invest at least $3,000 and apply within 90 days of completing your project.
MERRIAM	Exterior Home Improvement Grant	Provides a 20 percent reimbursement for exterior improvements upon completion. There is no income requirement but Homeowners need to have at least $2,500 in combined repairs/renovations
MISSION	Community Rebate Program (Franchise Fee/ Property Tax/Solid Waste Utility Rebates)	Income-eligible residents may apply to receive a full rebate of city telephone, electricity, or gas franchise fees for the year, a partial rebate of city property taxes, and a partial rebate of solid waste utility fees
	Mission Possible - minor home repair, dilapidated structures	Assists Mission homeowners with the removal of physical barriers, dilapidated structures, qualifying minor home repairs, house painting, and tree trimming. Funds are awarded based on the applicant's income, eligibility to receive Medicare/Social Security disability benefits, involvement in code case resolution, and other factors
MISSION HILLS	None found	
MISSION WOODS	None found	
OLATHE	Neighborhood Revitalization Area	A rebate of 90 percent of the incremental increase in property taxes from qualifying residential property improvements in the City's Original Town
	Healthy Neighborhood Initiative	Three programs which provide: grants for beautification projects or neighborhood events, a neighborhood health index map used to select a project yearly to help improve quality of life, and a neighborhood registration program.
	Taxi Coupon	Residents who meet guidelines can qualify to purchase taxi rides for work, medical or personal needs
	Family Self-Sufficiency Program	The Family Self-Sufficiency (FSS) Program assists families participating in the Section 8 Housing Choice Voucher Program to achieve economic self-sufficiency
	Homeownership Program	Residents purchasing homes through this program may qualify for down payment assistance. Program is limited to Section 8 Housing Choice Voucher participants.
	Deferred Loan Program	Income eligible homeowners who need to make major repairs to their home can apply for an interest-free, zero percent deferred loan.
	Emergency Repair Program	Income eligible homeowners can apply for repairs that would pose a threat to their health and safety, if left undone. Examples include a collapsed sewer, damaged roof or furnace.
	Accessibility Modification Program	Income eligible homeowners with physical limitations can apply for a grant to remove structural barriers from their home.
	Land Bank - Not active and holds no assets	

FIGURE 8.2: HOUSING RELATED PROGRAMS IN JOHNSON COUNTY

CITY	PROGRAM	DESCRIPTION
OVERLAND PARK	Community Development Block Grant Programs	Various programs for income-eligible households
	Land Bank - Not active and holds no assets	
PRAIRIE VILLAGE	Exterior Grant Program	A grant of twenty percent will be awarded as a reimbursement for construction costs between $2,500 and $12,500 for exterior remodeling
ROELAND PARK	Property Tax Rebate Program	Will rebate 100% of the City's portion of property taxes to those meet the Dept. of Housing and Urban Development's income guidelines for Johnson County
	Neighbors Helping Neighbors Program	Provides assistance to qualified Roeland Park resident homeowners for exterior home improvements using volunteers and contract labor
	Community Revitalization Program	Minor exterior home repairs. Projects include: Landscaping, Painting, Weatherization, Wheelchair ramp installation. Labor is completed by volunteers and homeowners
SHAWNEE	Neighborhood Revitalization Tax Rebate Program	If improvements made to the property increase the appraised value by at least $5,000, applicants may then qualify for a rebate of 90% of the eligible taxes paid on that increased value for ten years. The remaining 10% of the taxes will be placed in a special fund that the City will use to make improvements to the Neighborhood Revitalization boundary.
	Rebuilding Together Shawnee (Not a City Program)	Minor home repair and rehabilitation projects targeted for veterans and seniors.
	Shawnee City Ride Program	Provides transportation to Senior Citizens (age 65 years and older) and the disabled. Provides for rides to private residences, to businesses, to physician offices, and any other location inside the Shawnee City limits or to the Shawnee Mission Hospital complex or the Merriam Nutrition Center as well as the Johnson County Transit Center in Mission at no additional charge.
	Neighbors Helping Neighbors	Volunteer program coordinated by the City of Shawnee to connect home owners in need with minor property maintenance and repair issues to those that are willing to volunteer help.
SPRING HILL	None found	
JOHNSON COUNTY	Johnson County Minor Home Repair Program	
	Johnson County Utility Assistance Program	
	HOME Program	The HOME Program assists eligible Johnson County homeowners with rehabilitation of their homes to bring them into compliance with local housing codes (Housing Quality Standards).
	Homebuyer Assistance Program	Designed to assist low-to-moderate income Johnson County residents or persons who have been employed for at least two consecutive years in Johnson County with down payment/closing cost assistance. This program provides a deferred payment loan at 0% interest, and is forgiven 10% per year for 10 years, after which the loan is completely forgiven.
	Minor Home Rehabilitation Program	The Minor Home Rehabilitation program assists eligible Johnson County homeowners with home repairs and provides limited accessibility modifications for eligible persons with a disability. City of Olathe residents are not eligible for Minor Home Rehabilitation program services, but can apply with their city programs.
	Weatherization Program	Provides assistance to low-income residents of Johnson County in making their homes more comfortable, safe and energy efficient. Eastern Central Kansas Economic Opportunity Corporation administered the program.
	Neighborhood Stabilization Program	
	Senior Rebate Program	
	Christmas in October (Not a County Program)	Brings volunteers and communities together to improve the homes and lives of low-income, elderly, disabled, and Veteran homeowners on one day each October.

FIGURE 8.3: HOUSING GOALS APPLICABILITY

GOAL	POLICY TARGET HOUSING PRODUCT	TARGET HOUSING PRICE POINT	CITY OR LOCATION CONTEXT
1. ESTABLISH/CREATE/DEVELOP A NETWORK OF HOUSING ADVOCATES	All products, especially middle and higher density rental options	Various price points, moderate market rate preferred as targets because of their increased risk for builders.	Most applicable to fastest growing cities and areas of major redevelopment
2. CREATE MECHANISMS TO SHARE RISK	All products that meet the needs in this assessment	All price points acceptable. More policy incentives for homes under $250,000 and rents under $1,000. Deferred loans and developer paybacks more appropriate for higher price points that meet a product gap.	All cities and all locations outside of environmentally sensitive areas. Incentive policies reserved for areas contiguous to existing development and/or mixing of housing types
3. PRESERVE AND REHABILITATE EXISTING ATTAINABLE HOUSING	All products, especially single-family homes built before 2000	Focus on homes priced under $250,000.	All cities based on recommendations in Section 2
4. INCREASE THE VARIETY OF PRODUCT TYPES, ESPECIALLY IN MIDDLE-DENSITY RANGES	Townhomes, patio homes, multi-plexes, co-housing, Accessory Dwelling Units	All price points, focus toward moderate to market rate rents and home price points.	For landlocked cities - opportunities in redevelopment site. Other cities incorporated into new subdivisions and infill development.
5. REMOVE CODE UNCERTAINTIES IN THE DEVELOPMENT PROCESS	All products	Various price points.	Applicable to all cities
6. PRIORITIZE FUNDING/INCENTIVES FOR ATTAINABLE HOUSING ADJACENT TO JOBS AND TRANSPORTATION	Focus on rental options	All price ranges, but target mixed-income developments with a portion of rents under $1,000.	Cities on the Interstate or section arterial street systems; Logistics Park Kansas City Intermodal Facility
7. CONNECT EXISTING HOUSING RESOURCES AND FILL GAPS LEFT BY THE PRIVATE MARKET	N/A	Below market rate housing prices and rent; Below median household income levels.	All cities and all locations

FIGURE 8.4: STRATEGY TOOL SUMMARY BY TARGET PRICE POINT

HOUSING INCOMES	ATTAINABLE RENT	ATTAINABLE HOME OWNERSHIP	TARGET HOUSING TYPES	APPLICABLE STRATEGIES/GOALS	POSSIBLE FINANCING TOOLS
<$25,000	<$500-700	MOST HOUSEHOLDS IN RENTAL UNITS	• Rentals • Public Housing	• Public/Private partnerships (GOAL 2) • Expanding program options (GOAL 3) • Market existing programs (GOAL 3) • Funding for attainable housing near jobs/transportation (GOAL 6) • Connect existing resources (GOAL 7)	• Project-based Section 8 certificates and vouchers • Low Income Housing Tax Credit rental development • Senior only housing
$25,000-$50,000	AROUND $700-$1,200	PURCHASE PRICE UNDER $125,000	• Market rate rentals • Entry-level Homeownership (existing housing) • Market rate senior housing	• Housing factbook/Housing communication (GOAL 1) • Public/Private partnerships (GOAL 2) • Non-profit (GOAL 2) • Leverage risk sharing tools with housing goals (GOAL 6) • Broaden residential permitted uses (GOAL 4) • Connect existing programs (GOAL 7)	• Rehabilitation and revitalization programs • State and Federal grants, credit programs
$50,000-$75,000	>$1,000	$125,000-$200,000	• Market rate rentals • Entry-level Homeownership (existing housing)	• Housing fact book/Housing communication (GOAL 1) • Public/Private partnerships (GOAL 2) • Non-profit (GOAL 2) • Infrastructure cost-sharing (GOAL 2) • Expanding program options (GOAL 3) • Market existing programs (GOAL 3) • Variety in product types (GOAL 4) • Pre-packaged site plans/ RFPs (GOAL 5)	• Rehabilitation and revitalization programs • Special assessment or subordinate/deferred payments for new development (GOAL 2) • Tax Increment Financing • State and Federal grants, credit programs for ownership
$75,000-$100,000	>$1,500; MOSTLY HOME-OWNERSHIP	$200,000-$250,000	• Market rate rentals • Some market rate housing; Gap financed development	• Housing fact book/Housing communication (GOAL 1) • Public/Private partnerships (GOAL 2) • Infrastructure cost-sharing (GOAL 2) • Remove code uncertainties (GOAL 5) • Pre-packaged site plans/RFPs (GOAL 5)	• Infrastructure financing • Tax Increment Financing • Special assessment or subordinate/deferred payments for new development (GOAL 2)
>$100,000		>$250,000	• Market rate development • Gap financing generally not provided	• Housing factbook/Housing communication (GOAL 1) • Remove code uncertainties (GOAL 5)	• Generally not needed or advisable use of public funds

APPENDIX

ORDINANCE REVIEW CHECKLIST FOR ATTAINABLE HOUSING

Nationally, there is a growing discussion regarding the adverse impact ordinances have on the development of housing. As shown in this assessment, numerous factors contribute to the ability to produce affordable housing exclusive of codes. However, cities need to make sure that once these hurdles are overcome, municipal codes do not prohibit or add time to affordable housing development.

An individual ordinance review for each city is beyond the scope of this assessment. The following is a general checklist of typical ordinance standards to change.

1. Review past exceptions granted on residential development. If there are more than four or five similar exceptions granted each year, consider making the exception allowed by right.
2. Reduce or eliminate parking requirements for low-income or affordable housing units, especially within a half-mile of a transit line. Generally, off-street parking requirements for residential uses should be two spaces per unit at most. Multiple-family type uses can typically have standards lower than two spaces per unit.
3. Review setbacks, site coverage, and parking requirements to allow building on nonconforming small lots that exist in the city today.
4. Evaluate nonconforming building regulations to ensure compliance requirements focus mostly on properties with records of nuisance or building code violations rather than merely seeking more properties to align with regulations that did not apply at the time of construction. Examples include:
   - Restoration after damage - Exempt residential uses in residential zoning districts from any compliance trigger for lot size, setbacks, building size, and parking when damaged. Instead, allow restoration of these damaged structures to the condition at the time of damage.
   - Adaptive reuse and reconstruction - Specify adaptive reuse and reconstruction is allowed for any non-conforming building so long as the property has no known nuisance complaints or safety violations
   - Special permits for nonconforming structures - Exempt special permit requirements for reconstruction or structural alteration of residential uses if not changing the setback, height, or area as existing today
5. Eliminate regulating housing units by the number of "families." It is best to use other language that does not determine family by blood relation or similar means.
6. Consider opportunities to increase the city's contribution for wastewater, storm drain, and water improvements. An option is to tier contributions at a higher percentage in areas of higher density residential development or when 50% or more of the units will be affordable to households at 80% AMI or less.
7. Allow more residential uses in commercial/employment districts.
8. Change zoning districts that only allow single-family uses also to allow duplexes, attached housing, and even tri-plexes. Each city will have to evaluate the feasibility of this based on their context and design criteria.
9. Allow mixed residential and commercial uses in the same structure or site by right rather than only through a traditional Planned Unit Development district or similar overlay rezoning.

HOUSING TERMINOLOGY FOLLOW-UP

Housing should be discussed and presented in a way that relates to people's lives. This means framing how we talk about housing in staff reports, presentations, developer communication, realtors with clients, and public policies. Recommendations are below:

- Tell stories that balance the people, places, and systems perspectives.
- Don't directly contest the public assumptions about mobility, consumer choice and personal responsibility. Instead, explain the role of systems in shaping outcomes for people and the communities in which they live.
- Tell a "Story of Us" rather than a "Story of Them."Bring the connection between housing and other issues into sharper focus.
- Staffing shortages as schools and hospitals or increased property taxes when city costs rise, but population and new development don't.
- Help people connect the causes and effects of housing insecurity.
- Make it clear that where you live affects you.
- It's okay to raise challenges of the past but focus on the kinds of change that lead to better outcomes.
- Use robust examples that show how new housing policies worked.
- Avoid leading with or over-relying on the terms "housing" or "affordable housing."
- Widen the public's view of who is responsible for taking action and resolving outcomes.

Source: Kendall-Taylor, Nat. Tiffany Manuel. ""You Don't Have to Live Here" Why Housing Messages Are Backfiring and 10 Things We Can Do About It." Enterprise Community Partners, Inc. FrameWorks Institute.

FULL COMMUNITY SURVEY RESPONSES

Q1: In which community do you live?

Answered: 4,571 Skipped: 24

ANSWER CHOICES	RESPONSES	
Rural Johnson County	0.00%	0
Mission Woods	0.04%	2
Bonner Springs	0.09%	4
Mission Hills	0.15%	7
De Soto	0.37%	17
Westwood	0.61%	28
Rural Johnson County	0.68%	31
Westwood Hills	1.23%	56
Spring Hill	1.31%	60
Edgerton	1.71%	78
Lake Quivira	2.08%	95
Merriam	2.43%	111
Roeland Park	2.45%	112
Gardner	2.54%	116
Fairway	3.15%	144
Mission	3.46%	158
Leawood	4.57%	209
Prairie Village	7.99%	365
Lenexa	9.01%	412
Shawnee	9.76%	446
Olathe	20.94%	957
Overland Park	25.44%	1,163
TOTAL		4,571

What is your Zipcode?

ANSWER CHOICES	RESPONSES	
66205	13.33%	4
66208	40.00%	12
Other (please specify)	46.67%	14
TOTAL		30

ANSWER CHOICES	RESPONSES	
66202	20.00%	22
66203	70.00%	77
66204	9.09%	10
Other (please specify)	0.91%	1
TOTAL		110

ANSWER CHOICES	RESPONSES	
66206	18.10%	38
66209	39.52%	83
66211	6.67%	14
66224	34.76%	73
Other (please specify)	0.95%	2
TOTAL		210

ANSWER CHOICES	RESPONSES	
66214	0.00%	0
66215	43.24%	179
66216	4.83%	20
66217	0.24%	1
66219	28.26%	117
66220	10.87%	45
66227	10.63%	44
Other (please specify)	1.93%	8
TOTAL		414

ANSWER CHOICES	RESPONSES	
66202	85.35%	134
66205	14.65%	23
Other (please specify)	0.00%	0
TOTAL		157

ANSWER CHOICES	RESPONSES	
66061	44.97%	429
66062	54.09%	516
Other (please specify)	0.94%	9
TOTAL		954

ANSWER CHOICES	RESPONSES	
66212	18.45%	215
66213	13.39%	156
66204	11.76%	137
66221	11.59%	135
66223	11.33%	132
Other (please specify)	9.87%	115
66210	7.90%	92
66207	6.09%	71
66214	4.38%	51
66202	2.75%	32
66224	1.72%	20
66211	0.69%	8
66062	0.09%	1
TOTAL		1,165

ANSWER CHOICES	RESPONSES	
66203	26.41%	117
66218	35.67%	158
66217	3.84%	17
66219	10.84%	48
66226	18.74%	83
66227	2.93%	13
Other (please specify)	1.58%	7
TOTAL		443

Q11: How long does it take you to get to work?

Answered: 3,225 Skipped: 1,370

ANSWER CHOICES	RESPONSES
Under 15 minutes	51%
15 - 30 minutes	40%
31 - 45 minutes	8%
Over 45 minutes	1%
TOTAL	

Q12: What is your age?

Answered: 4,446 Skipped: 149

ANSWER CHOICES	RESPONSES	
17 and Under	0%	16
18-29	5%	242
30-44	33%	1,450
45-59	28%	1,264
60-74	27%	1,181
75 and Over	7%	293
TOTAL		4,446

Q13: What is your race?

Answered: 4,404 Skipped: 191

ANSWER CHOICES	RESPONSES	
White alone	88%	3,891
Black or African American alone	2%	72
American Indian and Alaska Native alone	0%	15
Asian alone	1%	44
Native Hawaiian and Other Pacific Islander	0%	5
Some other race alone	1%	31
Two or more races	3%	153
Prefer not to say	4%	193
TOTAL		4,404

Q14: Are you Hispanic or Latino?

Answered: 4,296 Skipped: 299

ANSWER CHOICES	RESPONSES	
Yes	4.03%	173
No	95.97%	4,123
TOTAL		4,296

Q15: Do you own or rent your home?

Answered: 4,454 Skipped: 141

ANSWER CHOICES	RESPONSES	
Own	84%	3,729
Rent	14%	624
Rent-to-Own	0%	14
Live with parents (for rent or free)	2%	73
Live with grown children (for rent or free)	0%	14
TOTAL		4,454

Q16: How many people live in your household?

Answered: 4,451 Skipped: 144

ANSWER CHOICES	RESPONSES	
1	16%	720
2-3	55%	2,450
4-6	28%	1,237
6+	1%	44
TOTAL		4,451

Q17: Is there a reason you opt to rent your home? (i.e. By cho or necessity?)

Answered: 622 Skipped: 3,973

ANSWER CHOICES	RESPONSES	
By Choice	33%	203
By Necessity	51%	318
Other (please specify)	17%	103
TOTAL		622

Q18: Do you believe that the current housing supply adequate meets the needs of the following household types in your city

Answered: 4,021 Skipped: 574

	YES	NO	DON'T KNOW	TOTAL
Families with children	69% 2,704	20% 802	11% 434	3,940
Young couples, no children	65% 2,559	21% 829	14% 556	3,944
"Empty-nesters"	64% 2,554	22% 887	13% 521	3,962
Single professionals	53% 2,095	28% 1,100	19% 749	3,944
Senior singles or couples	50% 1,983	32% 1,284	18% 696	3,963
Multi-generational families	32% 1,251	38% 1,495	30% 1,193	3,939
Students	22% 874	46% 1,823	31% 1,224	3,921
Physical/mental disabilities	14% 569	41% 1,608	45% 1,766	3,943
Needing near transit services	12% 481	64% 2,512	24% 947	3,940
Making below $16.00 an hour	10% 377	70% 2,777	20% 790	3,944
I do not live in a city	9% 243	72% 1,836	19% 484	2,563

Q19: Do you believe that the current housing supply adequately mee of the following household types in Johnson County as a whole?

Answered: 3,942 Skipped: 653

	YES	NO	DON'T KNOW	TOTAL
Young couples no children	72% 2,780	15% 585	13% 523	3,888
Families with children	71% 2,748	18% 690	11% 445	3,881
Single professionals	69% 2,687	17% 659	14% 552	3,898
"Empty-nesters"	66% 2,582	19% 755	14% 553	3,890
Senior singles or couples	55% 2,149	27% 1,067	17% 670	3,886
Multi-generational families	40% 1,534	32% 1,226	29% 1,121	3,881
Students	31% 1,196	38% 1,475	31% 1,191	3,862
Physical/mental disabilities	19% 746	38% 1,455	43% 1,678	3,879
Making below $16.00 an hour	15% 584	63% 2,466	21% 835	3,885
Needing to be near transit services	15% 584	57% 2,192	28% 1,078	3,854

Q20: How would you rate the supply of buildable lots in your c

Answered: 3,984 Skipped: 611

ANSWER CHOICES	RESPONSES	
Severe oversupply	2%	72
Moderate oversupply	4%	166
Adequate supply	25%	995
Moderate undersupply	19%	766
Severe undersupply	23%	904
Don't know	27%	1,081
TOTAL		3,984

Do you think the following housing products would be successful in Johnson County today?

Q21: Small two- or three-bedroom house

Answered: 3,798 Skipped: 797

ANSWER CHOICES	RESPONSES	
Yes	82.02%	3,115
No	17.98%	683
TOTAL		3,798

Q22: Mid-size, three-bedroom house

Answered: 3,811 Skipped: 784

ANSWER CHOICES	RESPONSES	
Yes	92.15%	3,512
No	7.85%	299
TOTAL		3,811

Q23: Larger home with four or more bedrooms

Answered: 3,758 Skipped: 837

ANSWER CHOICES	RESPONSES	
Yes	57.93%	2,177
No	42.07%	1,581
TOTAL		3,758

Q24: Large Lot Residential Housing

Answered: 3,735 Skipped: 860

ANSWER CHOICES	RESPONSES	
Yes	42.62%	1,592
No	57.38%	2,143
TOTAL		3,735

Q25: Townhouse or Duplex

Answered: 3,793 Skipped: 802

ANSWER CHOICES	RESPONSES	
Yes	72.42%	2,747
No	27.58%	1,046
TOTAL		3,793

Q26: Row Home - Tri-plex and Above

Answered: 3,767 Skipped: 828

ANSWER CHOICES	RESPONSES	
Yes	60.61%	2,283
No	39.39%	1,484
TOTAL		3,767

Q27: Apartment

Answered: 3,777 Skipped: 818

ANSWER CHOICES	RESPONSES	
Yes	53.75%	2,030
No	46.25%	1,747
TOTAL		3,777

Q28: Downtown Upper-story Residential

Answered: 3,744 Skipped: 851

ANSWER CHOICES	RESPONSES	
Yes	56.86%	2,129
No	43.14%	1,615
TOTAL		3,744

Q29: Independent - Senior Living Housing

Answered: 3,764 Skipped: 831

ANSWER CHOICES	RESPONSES	
Yes	78.32%	2,948
No	21.68%	816
TOTAL		3,764

Q30: Accessory Dwelling Unit (ADU, also known as "granny flats"). A unit located on the same property as the main house, typically above a garage, separate structure, or attached to the main house.

Answered: 3,772 Skipped: 823

ANSWER CHOICES	RESPONSES	
Yes	64.16%	2,420
No	35.84%	1,352
TOTAL		3,772

Q31: Cottage Court - A group of smaller homes that share yard space.

Answered: 3,780 Skipped: 815

ANSWER CHOICES	RESPONSES	
Yes	64.81%	2,450
No	35.19%	1,330
TOTAL		3,780

Q32: Mixed-income housing near transit stations

Answered: 3,756 Skipped: 839

ANSWER CHOICES	RESPONSES	
Yes	57.75%	2,169
No	42.25%	1,587
TOTAL		3,756

Q33: What type of housing do you believe area seniors and th elderly are most interested in? (Select One)

Answered: 3,697 Skipped: [illegible]

ANSWER CHOICES	RESPONSES	
Owner-occupied home with shared maintenance.	41%	1,512
Apartment with additional services available (for example: one meal a day, housekeeping, etc.)	23%	843
Small independent owner-occupied home.	15%	561
Residence that is attached or adjacent to the home of a family member.	12%	444
Independent apartment.	5%	190
Assisted living unit.	4%	147
TOTAL		3,697

Q34: What is your household's estimated gross annual income

Answered: 3,639 Skipped: 966

ANSWER CHOICES	RESPONSES	
Less than $15K	1%	48
$15K -$24K	3%	93
$25K -$49K	11%	389
$50K -$74K	16%	595
$75K -$99K	17%	613
$100K -$149K	26%	962
$150K -$199K	13%	478
$200K or more	13%	471
TOTAL		3,639

Q35: How much is your monthly rent or mortgage payment?

Answered: 3,692 Skipped: 903

ANSWER CHOICES	RESPONSES	
Paid off mortgage/living rent free	24%	878
Under $500	2%	68
$500 - $999	14%	523
$1,000 - $1,499	31%	1,150
$1,500 - $1,999	16%	608
$2,000 - $2,999	10%	363
Over $3,000	3%	102
TOTAL		3,692

Q37: Is there any reason you'd look for a new place to live in th next three years? (Choose all that apply)

Answered: 3,777 Skipped: 818

ANSWER CHOICES	RESPONSES	
None - I am happy with my current living arrangement	45.09%	1,703
Smaller owner home	16.84%	636
Larger owner home	15.38%	581
Different city for quality of life reasons	14.56%	550
Unit to age in place	11.60%	438
Current costs are too high	11.09%	419
Other (please specify)	10.48%	396
From rental to purchase a home	8.00%	302
Smaller rental unit	3.68%	139
Larger rental unit	2.12%	80
Into assisted living facility	1.80%	68
Total Respondents: 3,777		

Q38: In the past three years did you look for a new place to live regardless of where?

Answered: 3,729 Skipped: 866

ANSWER CHOICES	RESPONSES	
I looked to purchase a home	38%	1,403
I looked for a rental unit	14%	504
I did not look for housing	54%	2,010
Total Respondents: 3,729		

Q39: If you have looked to purchase a home in the past three years, how would you rate the availability of housing in your city for each of the following price categories? Skip if this does not apply to you.

Answered: [illegible] Skipped: [illegible]

	OVERSUPPLY	BALANCE BETWEEN SUPPLY AND DEMAND	UNDERSUPPLY	DON'T KNOW	TOTAL
Under $100,000	1% 11	4% 53	71% 911	24% 312	1,287
$100,000 - $149,999	1% 12	7% 97	72% 935	20% 254	1,298
$150,000 - $199,999	3% 34	15% 200	66% 863	16% 205	1,302
$200,000 - $299,999	9% 117	34% 452	46% 603	11% 143	1,315
$300,000 - $399,999	26% 337	37% 489	23% 304	14% 187	1,317
Over $400,000	46% 594	27% 349	8% 102	20% 256	1,301

Q40: If you have looked for rental housing in the past three years, how would you rate the availability of rental housing in your city for the following rental ranges? Skip if this does not apply to you.

Answered: [illegible] Skipped: 4,302

	OVERSUPPLY	BALANCE BETWEEN SUPPLY AND DEMAND	UNDERSUPPLY	DON'T KNOW	TOTAL
Under $500	1% 3	1% 3	82% 226	16% 45	277
$500 - $999	1% 2	13% 36	75% 210	11% 32	280
$1,000 - $1,499	26% 73	42% 118	21% 60	11% 31	282
$1,500 - $1,999	48% 132	28% 77	5% 14	19% 54	277
Over $2,000	47% 130	12% 34	4% 10	37% 101	275

Q41: Does your city need increased or continued use of city/public funding to remove dilapidated housing?

Answered: 3,700 Skipped: 895

ANSWER CHOICES	RESPONSES	
Yes	24%	890
No	36%	1,337
Don't Know	40%	1,473
TOTAL		3,700

Q42: Does your city need increased or continued use of city/public funding for housing rehabilitation or renovations?

Answered: 3,688 Skipped: 907

ANSWER CHOICES	RESPONSES	
Yes	41%	1,524
No	25%	904
Don't Know	34%	1,260
TOTAL		3,688

Q43: Which types of housing solutions would you support to reduce the cost of housing in Johnson County (select all that apply)?

Answered: [illegible] Skipped: [illegible]

[illegible]	[illegible]	[illegible]
Mortgage assistance	41%	[illegible]
[illegible]	[illegible]	[illegible]
Higher density housing	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]

Q47: If you provided your e-mail, would you be interested in being part of a Johnson County Task Force on implementing housing strategies?

Answered: 1,458 Skipped: 3,137

ANSWER CHOICES	RESPONSES	
Yes	38.48%	561
No	61.52%	897
TOTAL		1,458