

J M GOLDSON

EMPOWERING PEOPLE.
CREATING COMMUNITY.

ORLEANS HOUSING NEEDS ASSESSMENT

COMMUNITY FORUM

09/07/23

PRESENTATION BY

JENN GOLDSON, AICP

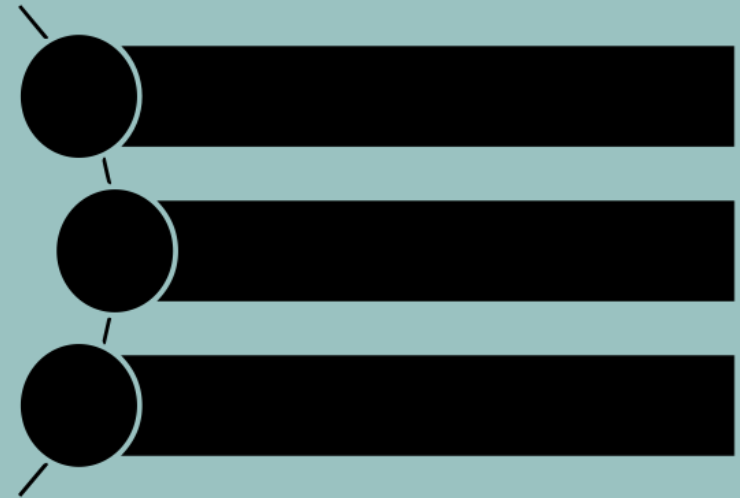
LAURA SMEAD, AICP

JM GOLDSON LLC



AGENDA

- Project Overview
- Orleans Housing Needs Overview
- Housing Stock Goals Discussion



PROJECT OVERVIEW

WHAT?

Orleans Housing Needs Assessment (HNA)

- : Understanding demographic, economic and housing trends
- : Identifying housing needs

WHAT WILL THE HNA INCLUDE?

- : Data Analysis
- : Housing Stock Goals
- : Housing Production Goals
- : Ten-Year Housing Plan
- : Plan for Updates and Reports



ORLEANS HOUSING NEEDS INDICATORS

1. Lack of diverse types of housing.
2. Lack of rental units.
3. There is a need for smaller units, and more barrier-free or ADA-accessible housing for seniors with mobility issues.
4. Low-income homeowners with housing problems need support to preserve their homes.
5. There is a need for more deeply affordable rental housing for extremely low-income households.
6. There is a need for more financially accessible, year-round housing to accommodate families with children.
7. There is a need for more financially accessible, year-round housing to accommodate employees and support a viable economy.

HOW CAN YOU CONTRIBUTE TONIGHT?

There are two ways to share your thoughts with us tonight:

1. Visit each board & share your thoughts
2. Join a small group activity, where a consultant team member will facilitate a conversation on the housing stock goals.

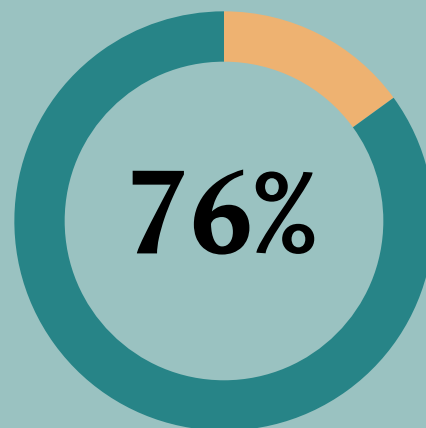


HOUSING STOCK GOALS

GOAL: DEVELOP YEAR-ROUND 'MISSING MIDDLE'
HOUSING IN THE VILLAGE CENTER

LACK OF DIVERSE TYPES OF HOUSING

ALLOWING FOR MIXED-USE, APARTMENT BUILDINGS, DUPLEXES, TOWNHOUSES, SINGLE-FAMILY HOME CONVERSIONS, COTTAGE CLUSTERS, AND ACCESSORY DWELLING UNITS PUT THE TOWN ON A PATH TOWARDS MORE SUSTAINABLE LAND USE PATTERNS AND MORE WALKABLE NEIGHBORHOODS.



- Multi-Family Housing
- Single-Family Housing

ENCOURAGE GROWTH IN STRATEGIC LOCATIONS

ZONING STRATEGIES AND CONTINUING INFRASTRUCTURE IMPROVEMENTS

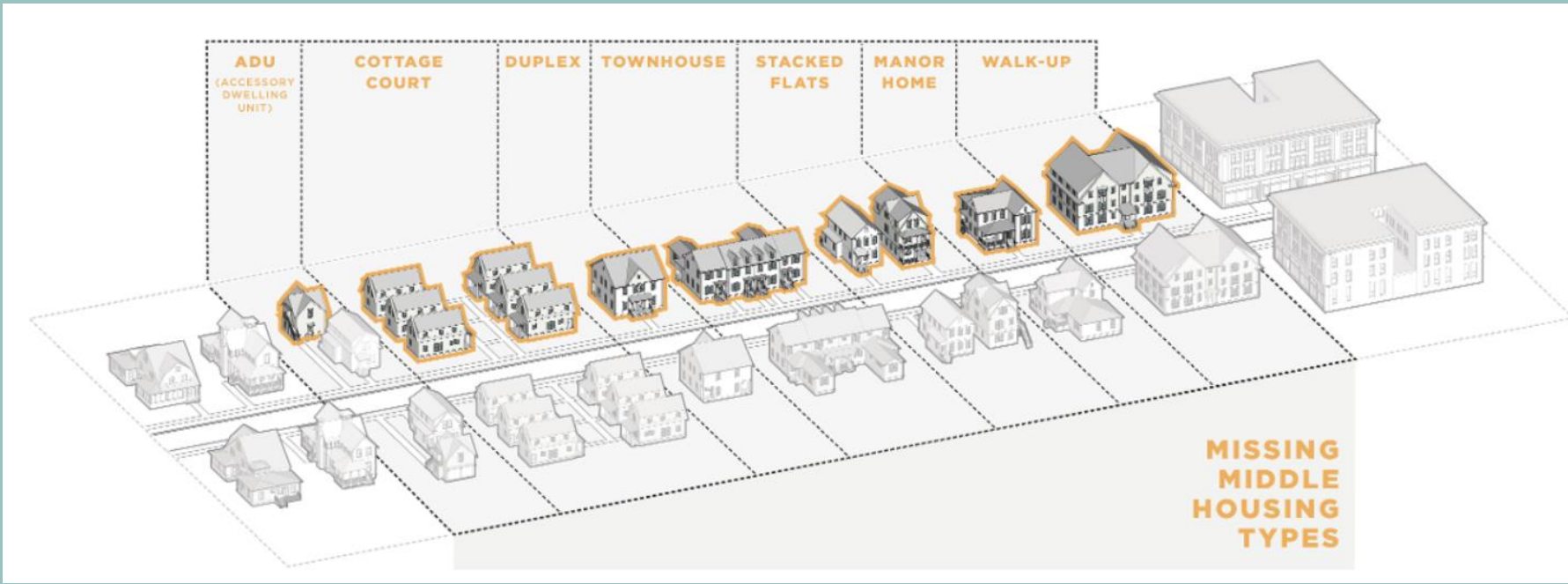


Image Credit: Daniel Parolek

GOAL: INCREASE THE PROPORTION OF YEAR-ROUND HOUSING STOCK AVAILABLE TO RENT.

RENTAL UNITS AS AN AFFORDABLE POINT OF ENTRY TO THE COMMUNITY

STRATEGIES TO PRODUCE MORE YEAR-ROUND RENTAL UNITS CAN INCLUDE:

- ZONING FOR MULTI-FAMILY HOUSING AS A RIGHT
- DEVELOPMENT GAP FUNDING
- ZONING INCENTIVES FOR MIXED-USE AND MULTI-FAMILY UNITS



Image Credit: SV Design

GOAL: SUPPORT HEALTHY AGING IN THE COMMUNITY BY ENABLING RESIDENTS TO ‘AGE IN PLACE’ AND EXPANDING THE NUMBER OF SMALLER UNITS AVAILABLE TO ORLEANS RESIDENTS, ESPECIALLY ACCESSIBLE UNITS.

MORE DIVERSE HOUSING OPTIONS CAN PROVIDE ALTERNATIVES FOR BOTH OLDER AND YOUNGER RESIDENTS.



SMALL GRANT RENOVATION PROGRAMS CAN IMPROVE ACCESSIBILITY OR FUND NECESSARY REPAIRS FOR LOW-INCOME HOUSEHOLDS.



FUNDING THE PRESERVATION AND EXPANSION OF HOUSING AUTHORITY UNITS CAN PROVIDE MORE FINANCIALLY ACCESSIBLE PLACES FOR SENIORS AND ADULTS WHO ARE DISABLED.

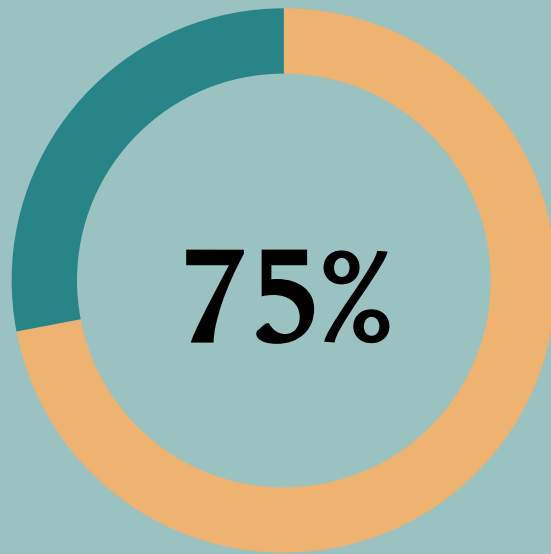


ZONING CAN INCENTIVIZE MORE BARRIER-FREE CONDOS, CONGREGATE HOUSING, AND CO-HOUSING WITH SHARED SERVICES.

GOAL: SUPPORT LOW-INCOME HOMEOWNERS WITH HOUSING PROBLEMS TO PRESERVE THEIR HOMES.

HOMEOWNERS AND COST BURDEN

SEVERELY COST BURDENED HOUSEHOLDS



■ Owners ■ Renters

ORLEANS, MA INCOME BY HOUSING PROBLEMS (OWNERS ONLY)

	Household has at least 1 of 4 Housing Problems	Household has none of 4 Housing Problems OR cost burden not available no other problems	Total	Percent of households experiencing a housing problem
Household Income <= 30% HAMFI	150	60	210	71%
Household Income >30% to <=50% HAMFI	100	50	150	67%
Household Income >50% to <=80% HAMFI	125	300	425	29%
Household Income >80% to <=100% HAMFI	35	300	335	10%
Household Income >100% HAMFI	150	980	1,130	13%
Total	560	1,690	2,250	

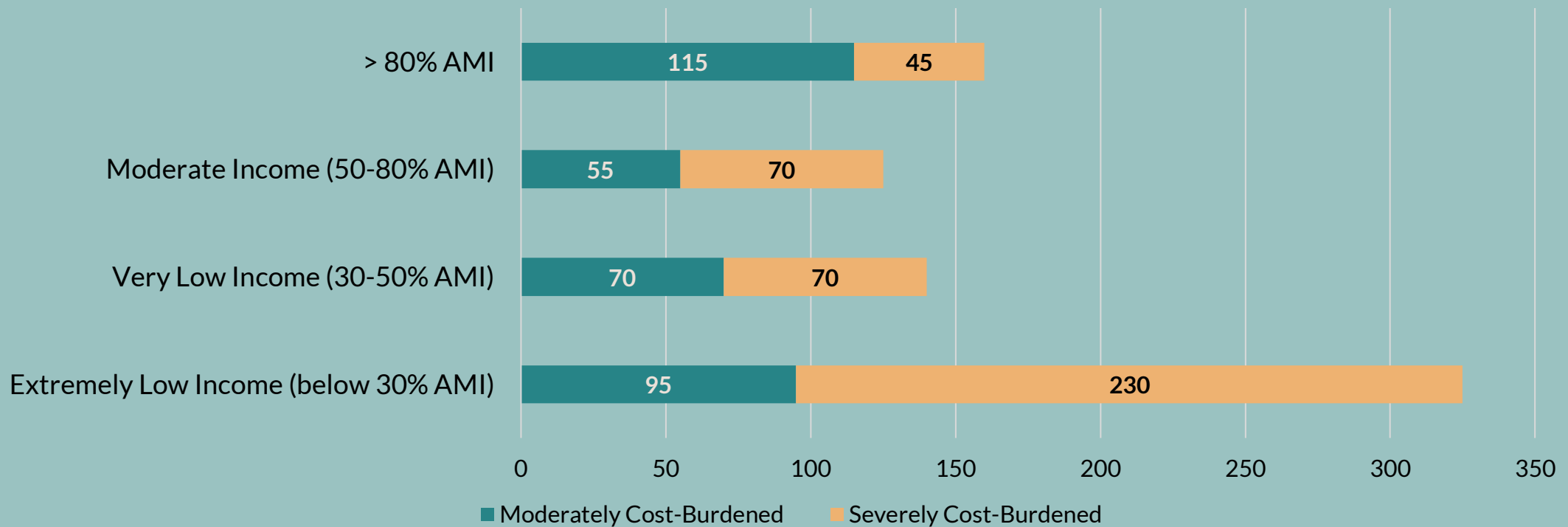
Source: HUD CHAS Link: <https://www.huduser.gov/portal/datasets/cp.html>

GOAL: PRESERVE AND INCREASE THE PROPORTION OF DEEPLY SUBSIDIZED YEAR-ROUND HOUSING STOCK AVAILABLE TO EXTREMELY LOW-INCOME HOUSEHOLDS.

THE MOST CRITICAL NEED FOR DEED-RESTRICTED AFFORDABLE UNITS IS FOR EXTREMELY LOW INCOME (ELI) HOUSEHOLDS.

NUMBER OF HOUSEHOLDS IN ORLEANS BY COST BURDEN, 2015-2019

Source: HUD CHAS



SUPPORT FOR ELI HOUSEHOLDS



ZONING AND GAP FUNDING CAN INCENTIVIZE A HIGHER PERCENTAGE OF AFFORDABLE UNITS AT VARIOUS INCOME LEVELS, INCLUDING EXTREMELY-LOW INCOMES.



EQUALLY IMPORTANT ARE LOCAL AND REGIONAL HOUSING ASSISTANCE PROGRAMS AND SERVICES FOR ORLEANS' MOST VULNERABLE RESIDENTS.




GOAL: CREATE AND PRESERVE FINANCIALLY ACCESSIBLE HOUSING APPEALING TO FAMILIES WITH CHILDREN.

FAMILIES

THE PREVIOUS GOALS WILL LIKELY HELP FAMILIES WITH CHILDREN ACCESS MORE ADDITIONAL FINANCIALLY ACCESSIBLE HOUSING OPTIONS.

WHAT ARE YOUR OTHER IDEAS TO PROVIDE FINANCIALLY ACCESSIBLE HOUSING FOR FAMILIES?


We can't afford to lose the people who can't afford to live here.




Matt and Marin R.
- Eastham

Matt and Marin are raising their family in Eastham. Matt is a hardworking lobsterman who earns just enough to disqualify them for most housing assistance programs, but not nearly enough to afford a home where they live, work and contribute to their community.

At the Community Development Partnership, we are advocating for more affordable housing options on the Outer Cape. When you can, we need you to use your voice and your vote to influence town housing policies, because our communities are better and stronger with people like Matt and Marin.



community development partnership
www.capecdp.org

Campaign sponsored by

 The Cooperative Bank of Cape Cod

GOAL: ADDRESS HOUSING NEEDS TO SUPPORT A VIABLE ECONOMY.

EMPLOYEES

THE PREVIOUS GOALS WILL LIKELY HELP EMPLOYEES ACCESS MORE FINANCIALLY ACCESSIBLE HOUSING OPTIONS.

WHAT ARE YOUR OTHER IDEAS TO PROVIDE FINANCIALLY ACCESSIBLE HOUSING FOR EMPLOYEES?

“AS A FIRST RESPONDER, YEAR-ROUND RENTALS ARE DIFFICULT TO FIND AND WE DO NOT MAKE ENOUGH TO AFFORD HOMES ON THE LOWER OR OUTER CAPE REGARDLESS OF THE TOWN.

FINDING HOUSING OPTIONS FOR EMPLOYEES SHOULD BE A PRIORITY TO ALLOW THE TOWNS TO CONTINUE PROVIDING HIGH QUALITY SERVICES.”

THANK YOU!

Jenn Goldson, AICP
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Laura Smead, AICEP
laura@jmgoldson.com

JM Goldson LLC
617-221-4003

The logo for JM Goldson LLC, featuring the letters J, M, and G stacked vertically, with a C to the right of the M and G. The letters are in a light orange color. A large, thin, light orange line forms a large, irregular shape that encompasses the logo and extends across the right side of the slide.

J
M
G
C

REFERENCE SLIDES

HOUSING ORGANIZATIONS IN ORLEANS

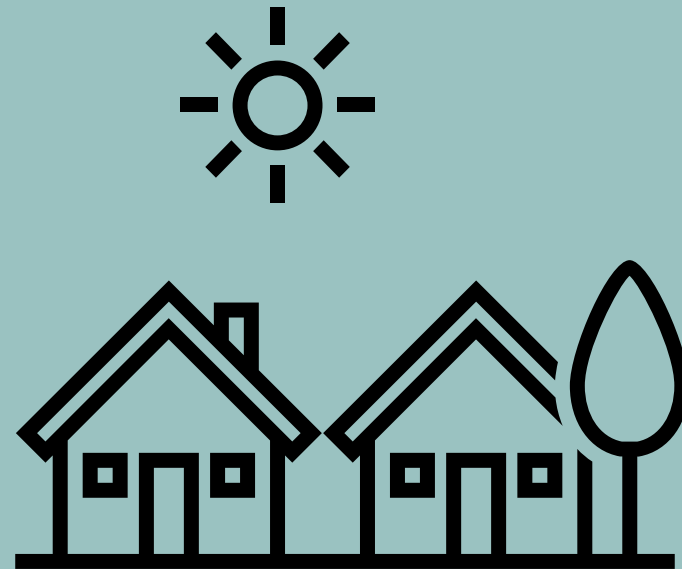
p: 617-221-4003

w: JMGOLDSON.COM



ORLEANS AFFORDABLE HOUSING TRUST

- Established in 2019
- Charged with the responsibility to preserve and create affordable housing to serve the needs of low-and-moderate-income (LMI) households within the community.



HOUSING TRUST BASICS

1. A way to set aside funds dedicated to help address local housing needs
2. Overseen by a board of trustees
3. Authority to buy, sell, and lease real property, receive and appropriate funding (subject to Select Board oversight of land acquisition and disposition)



WHAT CAN YOU DO WITH TRUST FUNDS?

The Orleans AHT has supported:

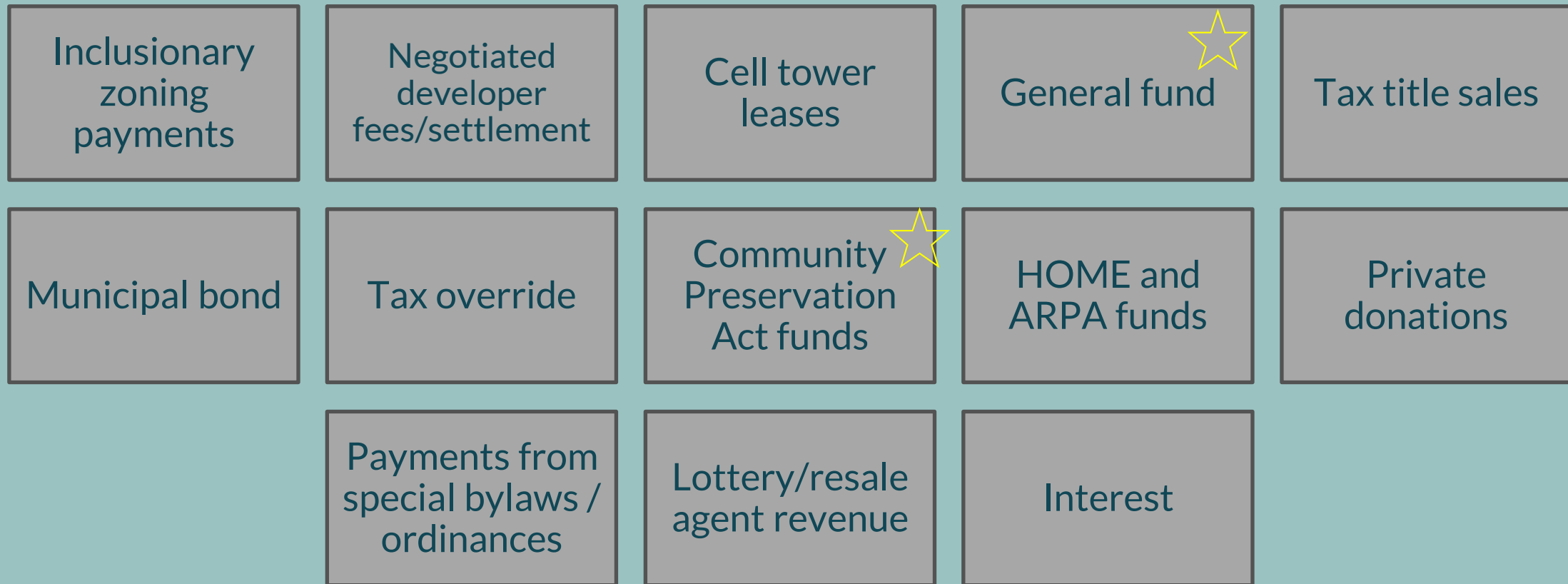
- Land and funding for the 107 Main Street project (14 units)
- Funding through the Community Preservation Committee for Pennrose project (62 units, set to deliver units by 2024-2025)
- Acquisition of the Governor Prence Motel property



Image Credit: Trivago.com

WHERE CAN THE TRUST GET REVENUE FROM?

 Orleans AHT past and potential funding.



ORLEANS AFFORDABLE HOUSING COMMITTEE

- Broad and long-term perspective
- Needs, policies, and strategies to create and preserve low- and moderate-income housing opportunities for a diverse population, including all age and income levels
- Emphasis on lower-income households
- Emphasis on meeting the workforce demands of the local economy.

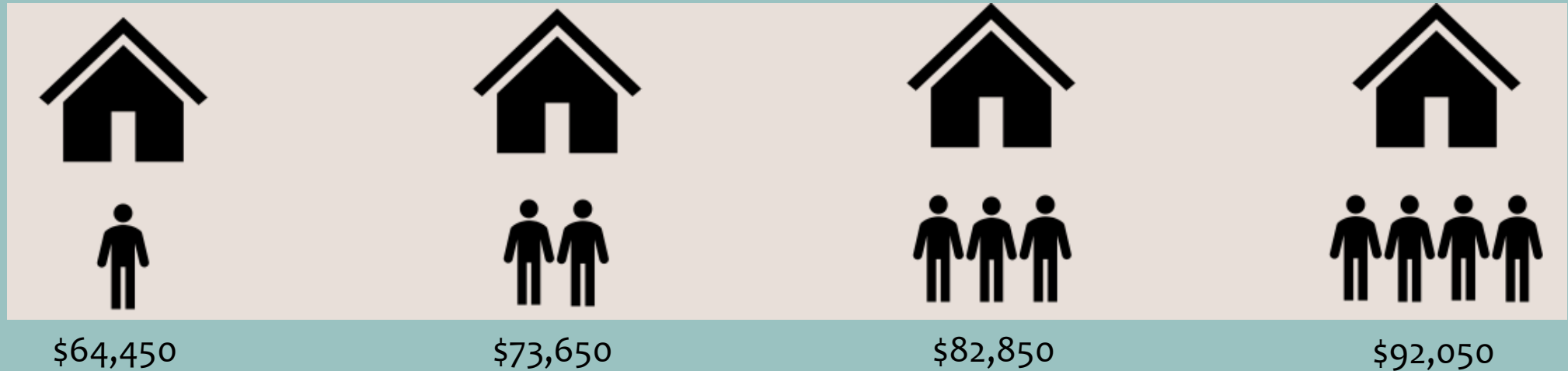
ADDITIONAL RESOURCES

- Housing Coordinator
- Community Preservation Committee



DEFINITIONS

WHAT IS AFFORDABLE HOUSING?



A home is affordable when a household pays no more than 30% of its gross income toward housing costs.

Low/Moderate Income Households (LMI) = at or below 80% of the Area Median Income

WHAT IS WORKFORCE HOUSING?

1. A communities workforce people who work in the region – this can be at any income level.
2. The state’s Workforce Housing Initiative includes funding for units affordable to households between 60% and 120% AMI

Workforce Housing Initiative

MassHousing has invested more than \$100 million in its Workforce Housing fund, which supports the creation of rental housing that is affordable for households whose incomes are too high for subsidized housing but are priced out by market rents.

Workforce Housing Program Highlights

- Supports housing with rents affordable to individuals and families with incomes of generally between 60% and 120% of Area Median Income (AMI)
- Provides up to \$100,000 of subsidy per workforce housing unit
- Leverages strategic opportunities to use state-owned land
- Complements, does not replace traditional MassHousing development financing
- Ensures workforce housing units are deed restricted as affordable

COMMUNITY ENGAGEMENT

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COMMUNITY ENGAGEMENT

- : Community Survey
- : Focus Groups



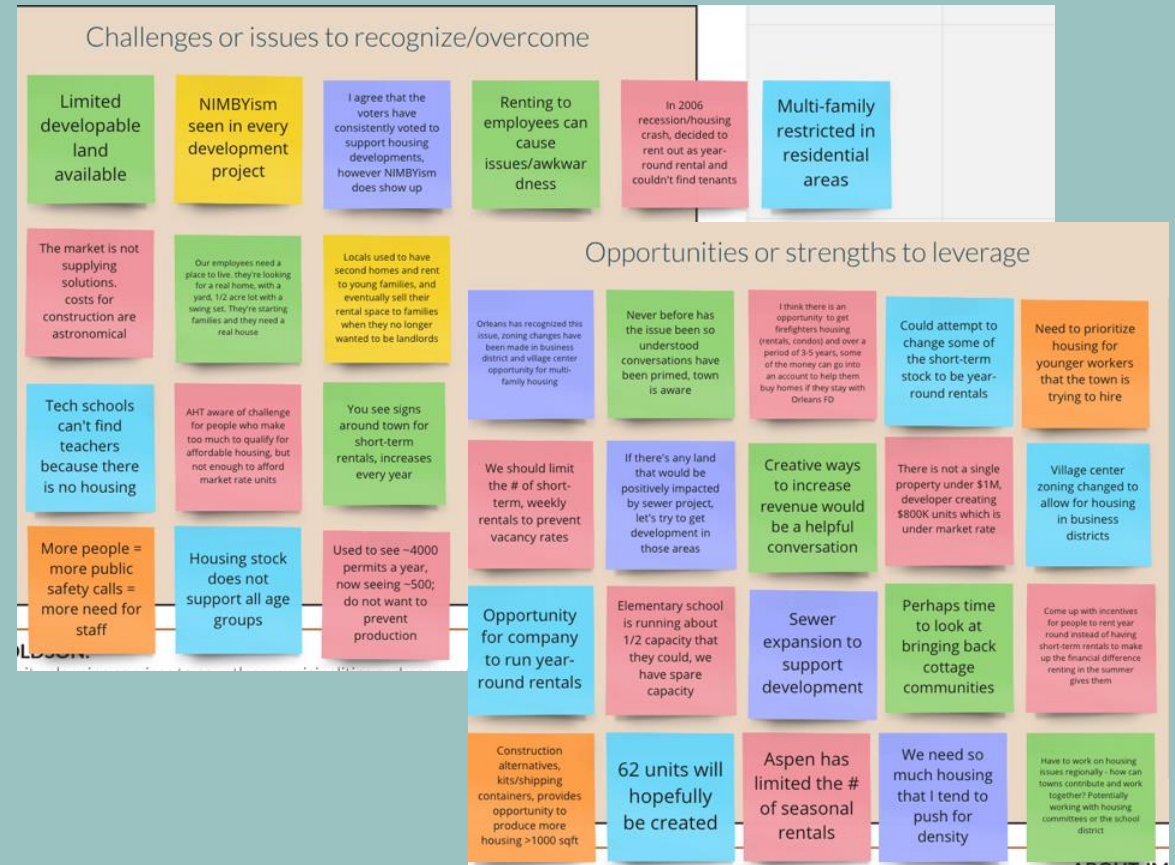


FOCUS GROUPS

JUNE – 3 focus groups, 15 people

- Continued rise of short-term rentals limits year-round housing options
- Lack of developable land
- Increased need for workforce housing
- Allow accessory dwelling units (ADUs) by right
- "NIMBY-ism" has attempted to block prior efforts by new developments

What are the greatest opportunities and challenges related to this topic area in your community?





COMMUNITY SURVEY

JUNE – 364 responses

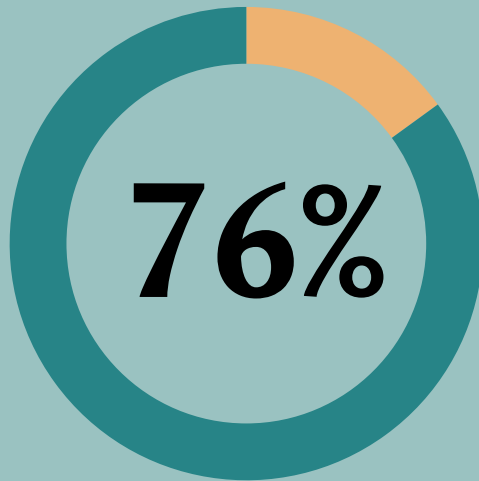
- : 67 percent of homeowners and 47 percent of renters indicated they would not be able to afford the current average housing costs in Orleans
- : Most pressing challenges are the **lack of affordable year-round rental and home-ownership housing options**
- : **Over half of businesses** have had trouble recruiting or retaining employees in the past five years
- : Non-resident survey respondents **were more than twice as likely to be families with children under 18** than Orleans residents; most significant barrier to living in Orleans was high cost of housing



HOUSING AND DEMOGRAPHIC DATA

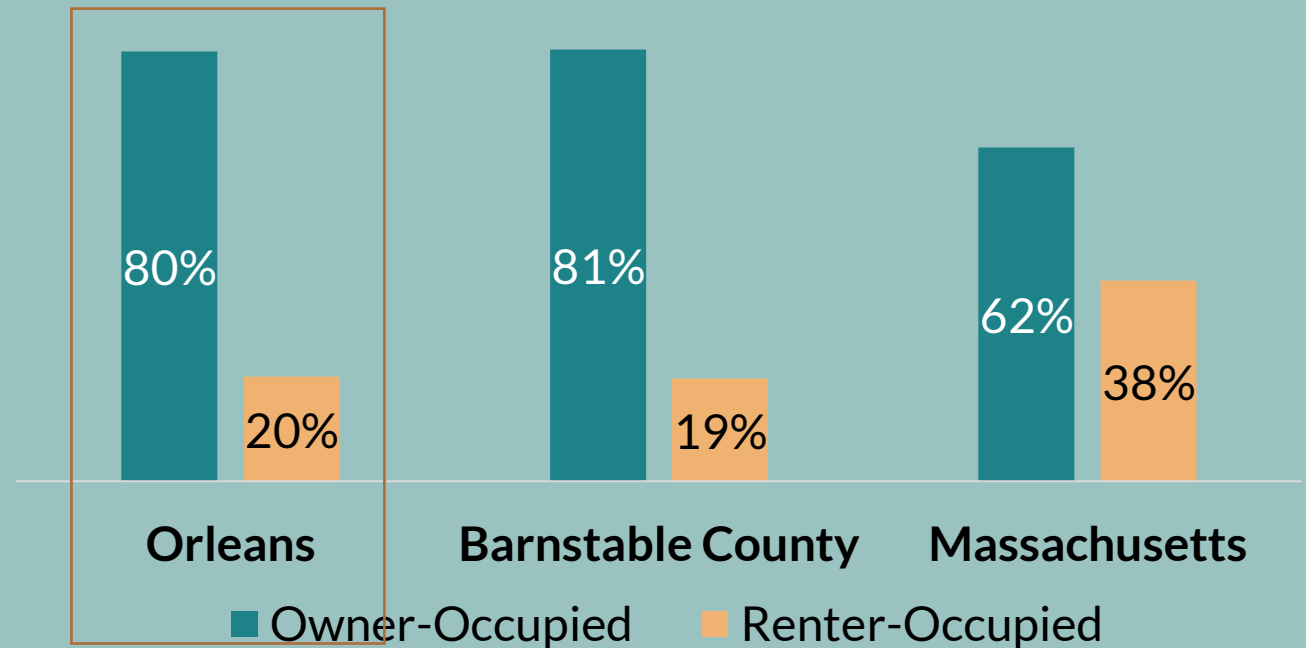
LACK OF DIVERSE TYPES OF HOUSING

MOST OF ORLEANS' HOUSING STOCK IS SINGLE-FAMILY



- Multi-Family Housing
- Single-Family Housing

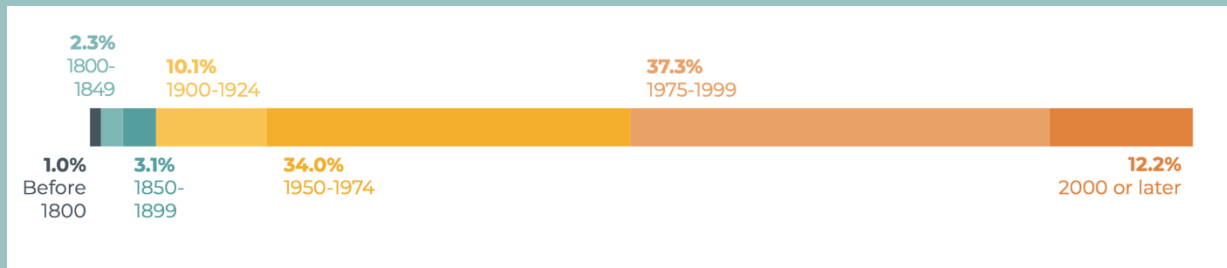
ONLY 20 PERCENT OF YEAR-ROUND HOUSING IS AVAILABLE TO RENT



Source: United States Census Bureau. "2021 5-year American Community Survey." Accessed May 2023. <https://data.census.gov/cedsci/>.

LACK OF NEW AND FINANCIALLY ATTAINABLE HOUSING BEING BUILT

ONLY 12 PERCENT OF THE OVERALL HOUSING STOCK HAS BEEN BUILT SINCE 2000.



Source: Cape Cod Commission. "Housing Profiles." Accessed July 2023. <https://capecodcommission.org/our-work/housing-profiles>

HOUSING BUILT IN THE PAST FIVE YEARS HAS BEEN ALMOST ENTIRELY MARKET-RATE SINGLE-FAMILY HOMES.

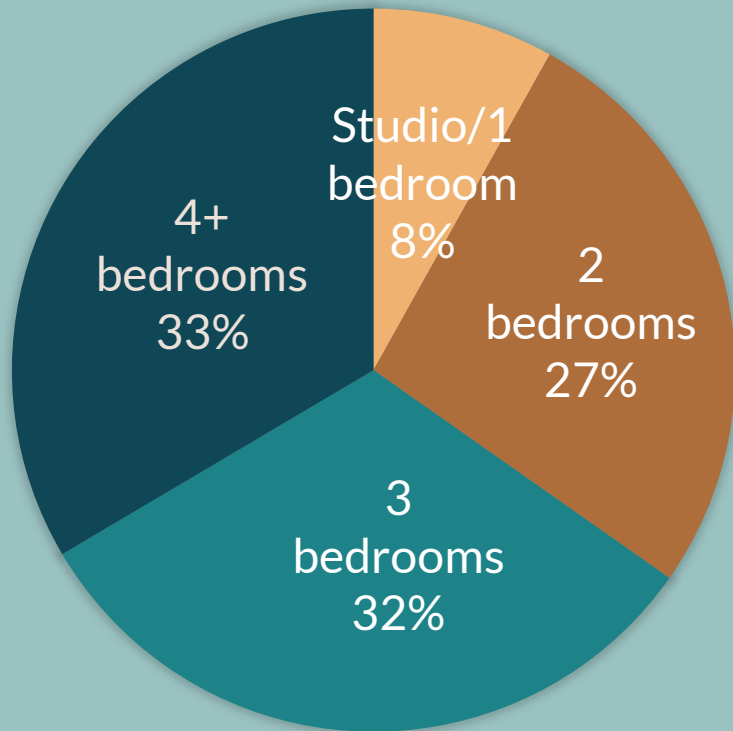


IN THE LAST FIVE YEARS, 76 NEW SINGLE-FAMILY HOMES HAVE BEEN BUILT IN ORLEANS.

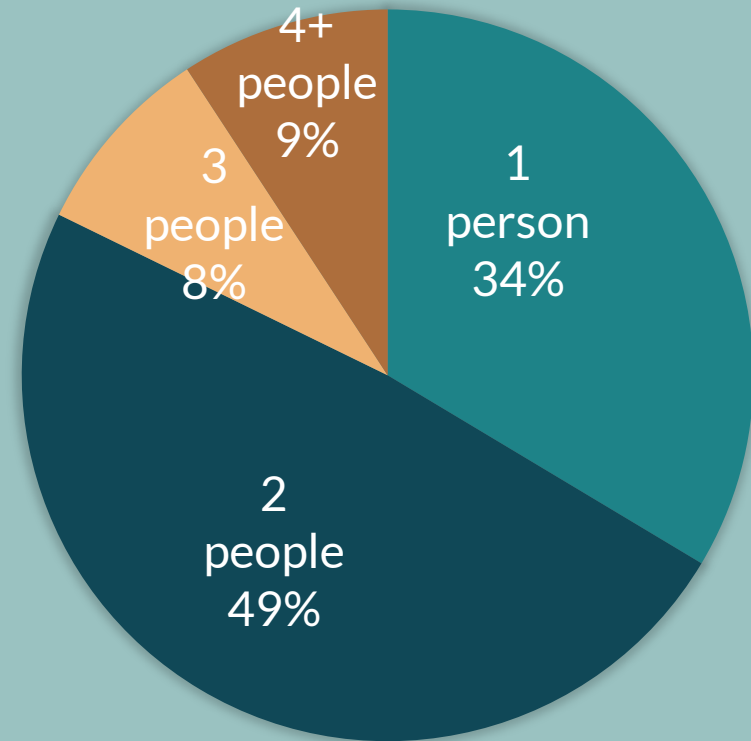
Source: Social Explorer, Building Permits Data, US Census Bureau; [Data from town planner, EBE to update]

MISMATCH OF UNIT TYPES AND HOUSEHOLD SIZE

MOST ORLEANS HOUSING UNITS HAVE THREE OR MORE BEDROOMS



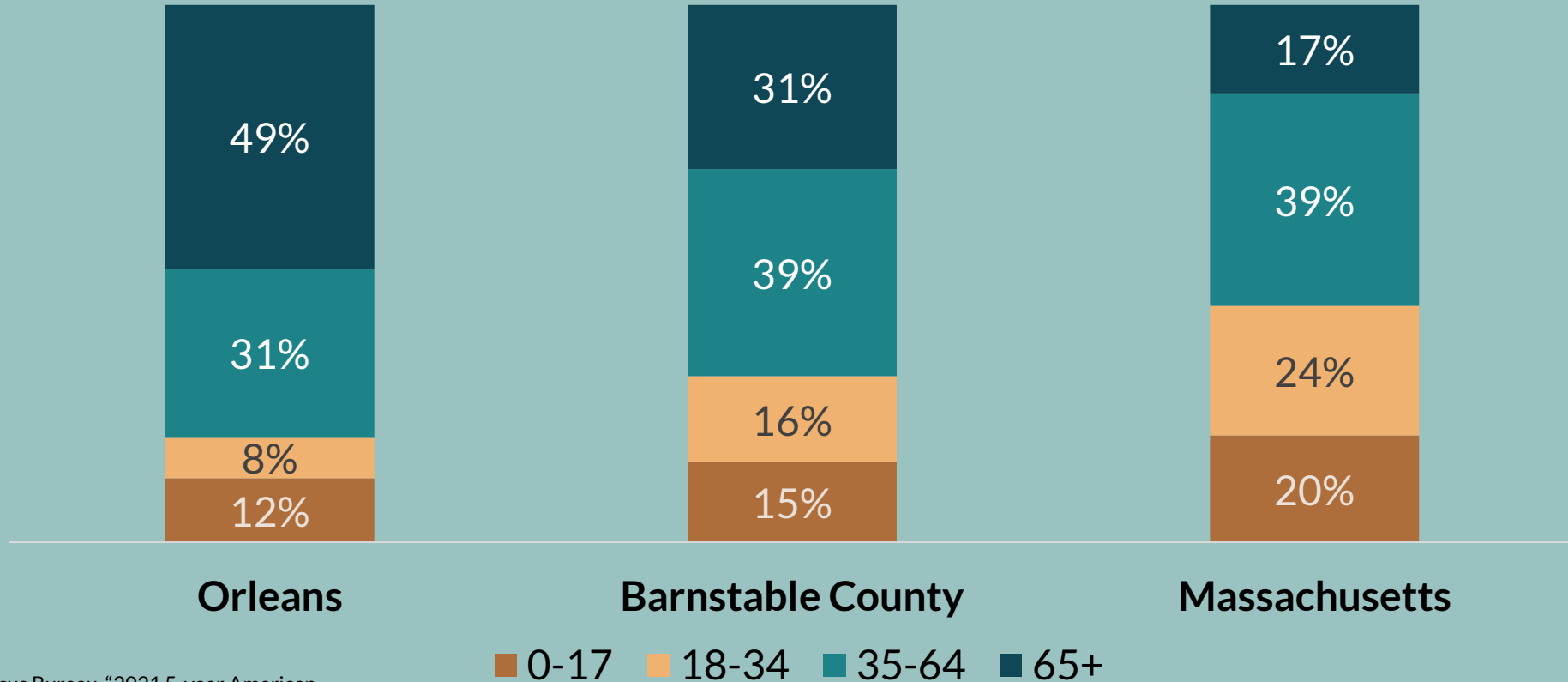
MOST HOUSEHOLDS HAVE ONE OR TWO PEOPLE



Source: United States Census Bureau. "2021 5-year American Community Survey." Accessed May 2023. <https://data.census.gov/cedsci/>.

WORKING-AGE ADULTS ARE GETTING PRICED OUT OF ORLEANS

ORLEANS HAS LESS THAN HALF THE NUMBER OF YOUNGER ADULTS (UNDER AGE 34) AS THE STATE.

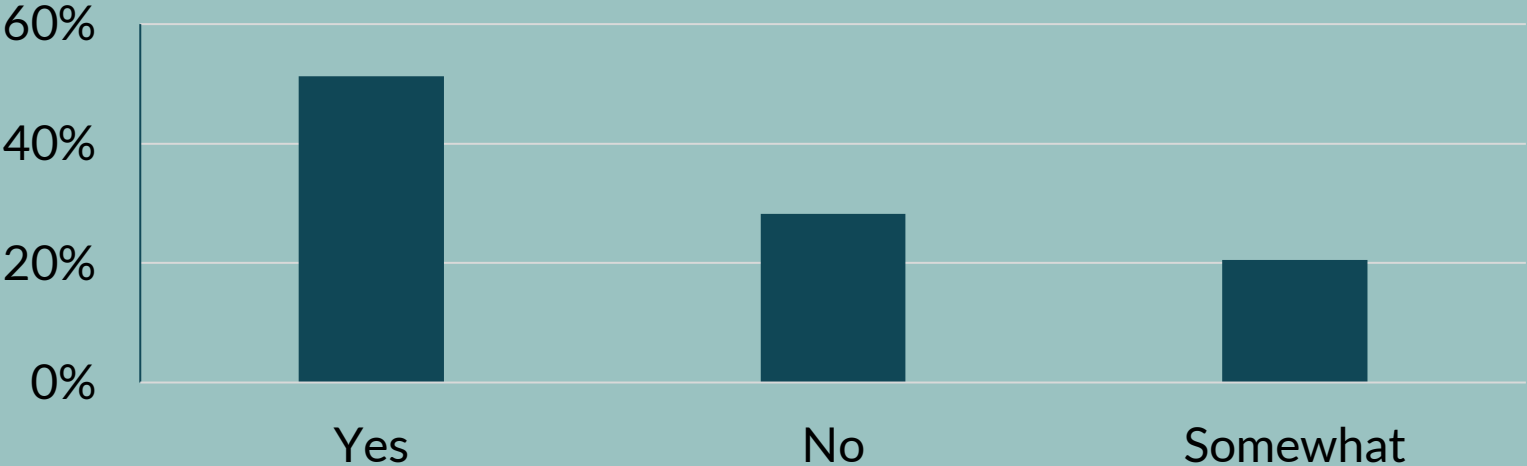


Source: United States Census Bureau. "2021 5-year American Community Survey." Accessed May 2023. <https://data.census.gov/cedsci/>.

EMPLOYERS STRUGGLE TO RECRUIT AND RETAIN EMPLOYEES

SURVEY RESULTS AND FOCUS GROUP RESULTS INDICATE THAT EMPLOYERS STRUGGLE TO RECRUIT AND RETAIN EMPLOYEES, AND THE AVAILABILITY OF RENTAL HOUSING AND THE HIGH COST OF HOUSING IS THE GREATEST CONCERN FOR EMPLOYEES.

IN THE PAST FIVE YEARS, HAVE YOU HAD TROUBLE RECRUITING OR RETAINING EMPLOYEES?



ORLEANS NON-RESIDENTS

SURVEY RESULTS INDICATE THAT EMPLOYEES WHO WORK IN ORLEANS BUT DO NOT LIVE IN ORLEANS ARE TWICE AS LIKELY TO HAVE CHILDREN UNDER 18 LIVING AT HOME AS ORLEANS RESIDENTS.

THE **HIGH COST OF HOUSING** IS THE GREATEST BARRIER TO LIVING IN ORLEANS.

NON-RESIDENTS: "WHAT KEEPS YOU FROM LIVING IN ORLEANS FULL-TIME?"



SEASONAL, RECREATIONAL, AND OCCASIONAL USE

CLOSE TO 50 PERCENT OF ALL HOUSING UNITS IN ORLEANS ARE FOR SEASONAL, RECREATIONAL, OR OCCASIONAL USE.



13%

Overall housing stock
are active short-term
rentals



11%

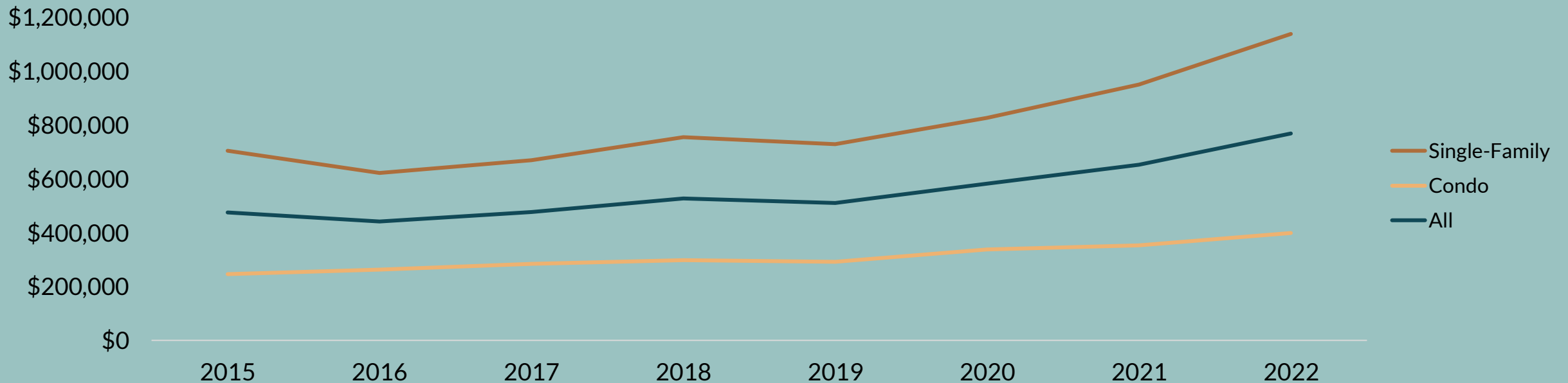
Overall vacancy
rate

COST OF HOUSING IS INCREASING

THE MEDIAN SALES PRICE OF SINGLE-FAMILY HOMES HAS INCREASED BY 70 PERCENT IN THE PAST FIVE YEARS.

MEDIAN SALES PRICE IN ORLEANS, 2015-2022

Source: Cape Cod & Islands Association of Realtors



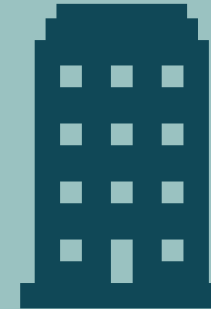
TO PURCHASE A TYPICAL HOME IN 2023, A HOUSEHOLD MUST MAKE OVER \$344,786 IN ANNUAL INCOME, OVER FOUR TIMES THE ORLEANS 2021 MEDIAN HOUSEHOLD INCOME.

CONSTRUCTION OF NEW HOUSING IS HELD BACK BY VARIOUS CONSTRAINTS

CONSTRUCTION OF NEW HOUSING IS HELD BACK BY THE RISE IN CONSTRUCTION COSTS AND OTHER BARRIERS TO DEVELOPMENT (ENVIRONMENTAL, INFRASTRUCTURE, AND REGULATORY).



ORLEANS HAS 2,522 ACRES OF PROTECTED OPEN SPACE, WHICH COMPRISES ABOUT 17 PERCENT OF THE TOTAL LAND AREA.



ORLEANS ZONING HAS NOT ENCOURAGED MULTIFAMILY HOUSING DEVELOPMENT.

HOUSING SUPPLY VERSUS DEMAND DEFICIT

UMASS DONAHUE INSTITUTE PROJECTS AN ORLEANS' HOUSING SUPPLY VERSUS DEMAND DEFICIT OF 500 TO 600 HOUSING UNITS IN THE NEXT TEN YEARS.

Year	Demand	Projection (Total)	Gap
2020	6,353	5,776	-577
2025	6,643	6,051	-592
2030	6,870	6,367	-503

Source: UMDI CapeCod Housing Projections, 2022. Data for Orleans was extracted from Tables 15 and 16.

COST BURDEN IN HOUSEHOLDS

MORE THAN ONE IN THREE HOUSEHOLDS IN
ORLEANS ARE HOUSING COST-BURDENED.

61%

Not cost-burdened

25%

Moderately cost-
burdened

13%

Severely cost-
burdened

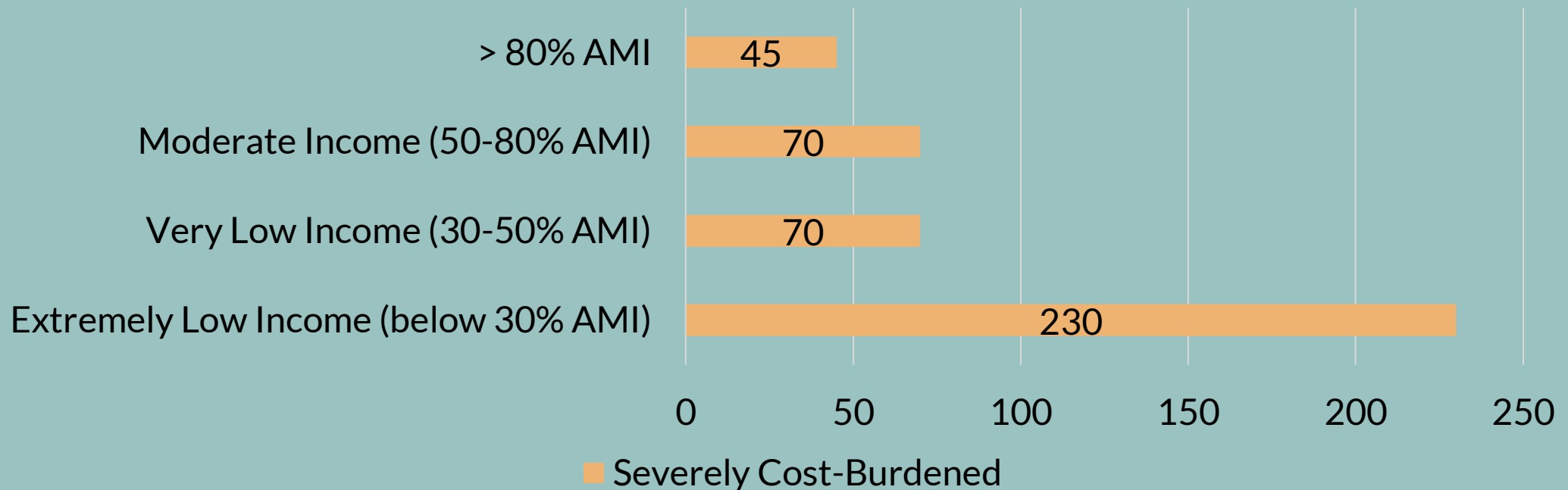
Source: United States Census Bureau. "2021 5-year American Community Survey." Accessed August 2023.
<https://data.census.gov/cedsci/>.

SEVERELY COST-BURDENED: RESIDENTS WITH EXTREMELY LOW INCOMES (BELOW 30%AMI)

THE LARGEST SEVERELY COST-BURDENED GROUP IS RESIDENTS WITH EXTREMELY LOW INCOMES (BELOW 30 PERCENT AREA MEDIAN INCOME).

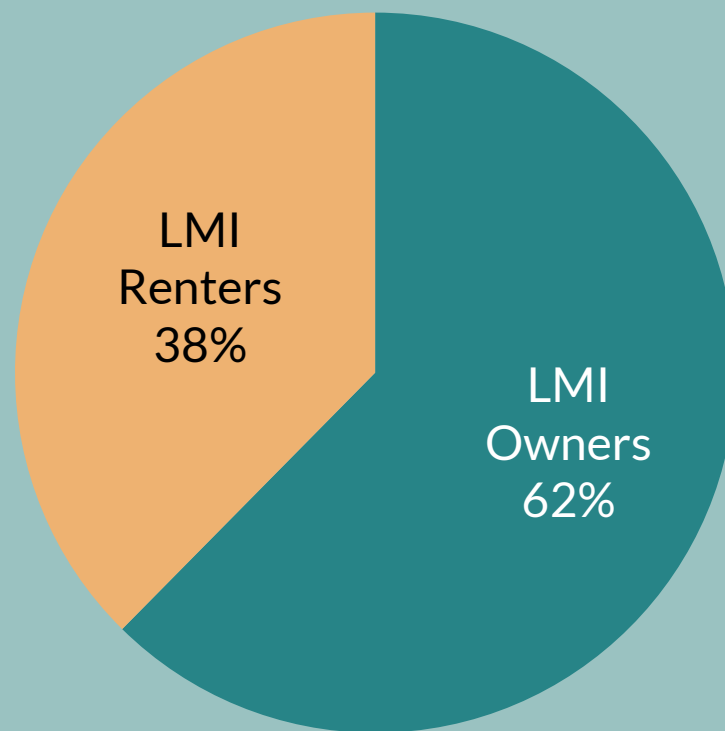
NUMBER OF HOUSEHOLDS IN ORLEANS BY COST BURDEN, 2015-2019

Source: HUD CHAS



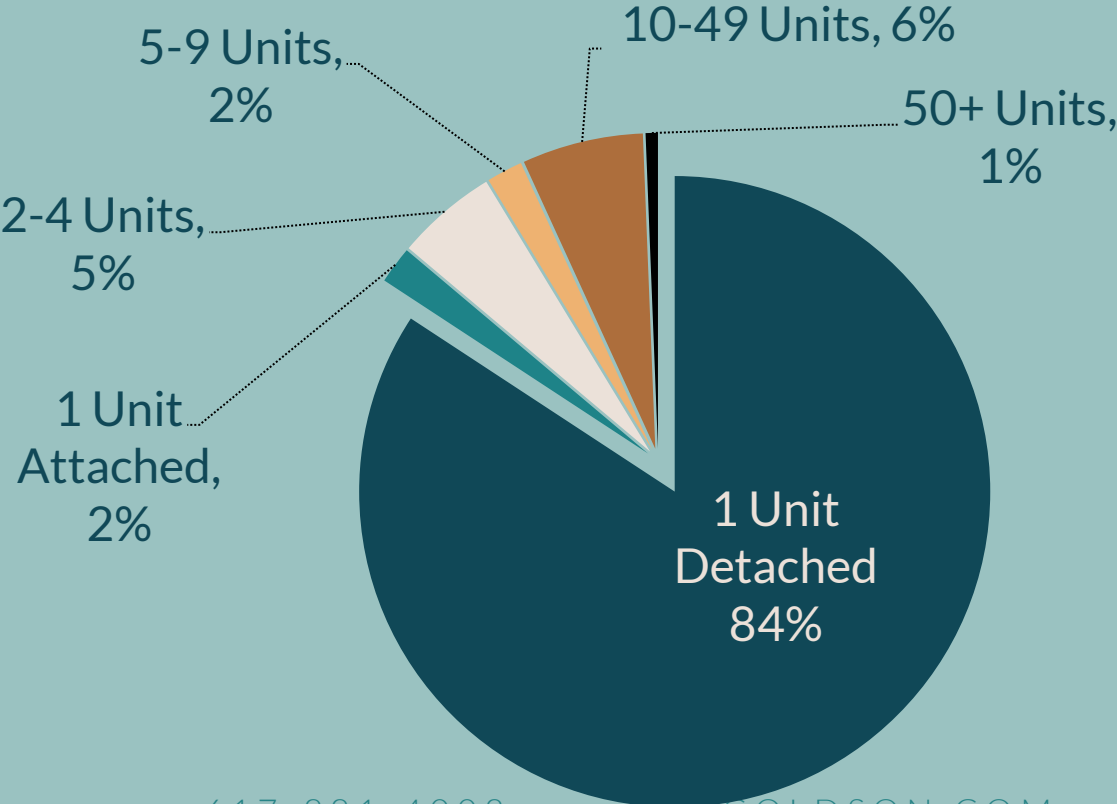
OWNERS AND COST BURDEN

OWNERS ARE A GREATER SHARE OF ALL COST-BURDENED HOUSEHOLDS (62 PERCENT) THAN RENTERS (38 PERCENT).



FEW OPTIONS FOR SENIORS

A SENIOR HOPING TO DOWNSIZE INTO A SMALLER OR MORE ACCESSIBLE HOME DOESN'T HAVE MUCH TO CHOOSE FROM: ONLY FOURTEEN PERCENT OF ALL HOUSING UNITS ARE TWO UNITS OR MORE.



HIGHER PROPORTION OF SENIORS AND MOBILITY

PER THE AMERICAN COMMUNITY SURVEY (2021), THERE ARE APPROXIMATELY 546 RESIDENTS OVER 65 YEARS WITH A DISABILITY (18 PERCENT OF THE OVERALL POPULATION).



ROCK HARBOR VILLAGE (ABOVE) OFFERS APARTMENTS FOR INDIVIDUALS 62 AND OLDER AND 18 AND OLDER DISABLED.

Image Credit: Rock Harbor Village Apartments website

REMOTE WORK HAS BECOME MORE COMMON IN ORLEANS

MORE “WHITE-COLLAR” WORKERS CAN LIVE FURTHER FROM THEIR OFFICES, INCREASING HOUSING DEMAND IN ORLEANS.



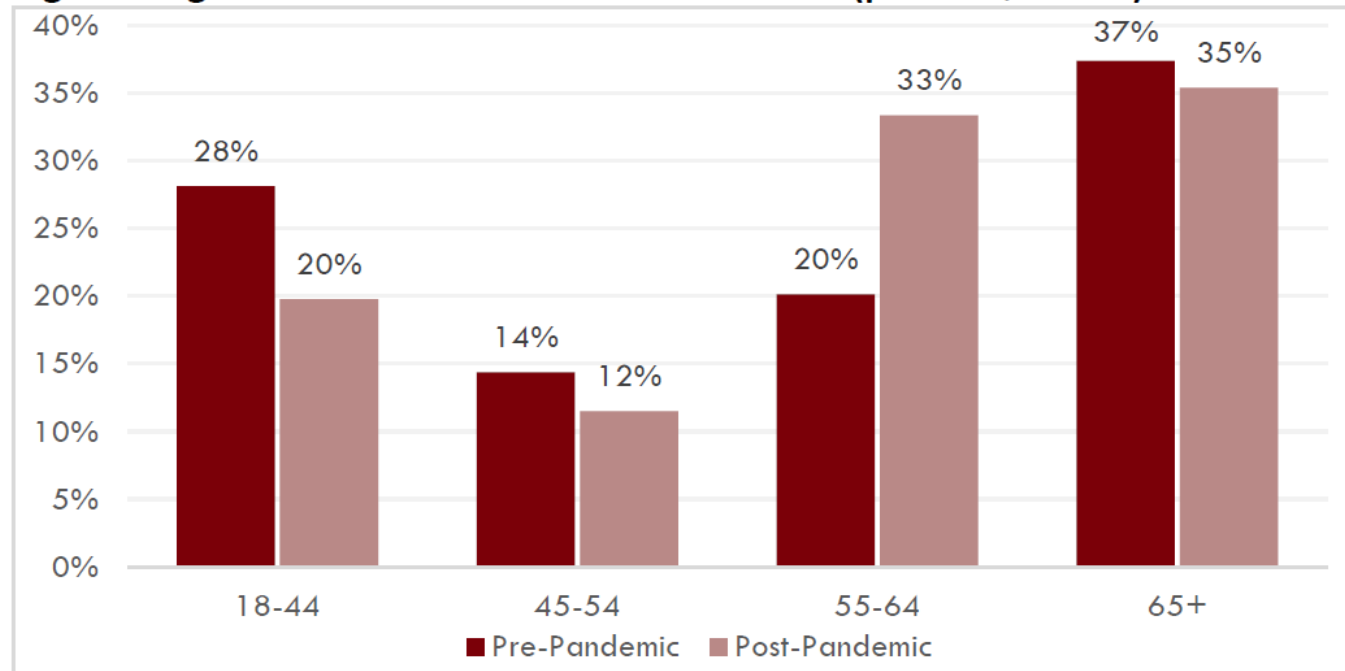
**18.5% OF ORLEANS RESIDENTS
WORKED FROM HOME IN 2021.**

Source: United States Census Bureau. “2021 5-year American Community Survey.” SE: A09005: Means of Transportation to Work for Workers 16 Years and Over, the category “Worked at Home.” Accessed May 2023. <https://data.census.gov/cedsci/>.

MANY RETIREES AND OLDER WORKERS CHOSE TO RELOCATE TO ORLEANS DURING THE PANDEMIC

OLDER YEAR-ROUND RESIDENTS AND REMOTE WORKERS INCREASED IN THE PAST TEN YEARS, INCREASING YEAR-ROUND HOUSING DEMAND IN ORLEANS.

Figure 8 Age of Pre- and Post-Pandemic Arrivals (p=0.147, n=696)



Source: Cape Cod Residents Survey 2022.

DECREASE IN POPULATION?

IF WE ONLY CONSIDER NATURAL CHANGE VERSUS MIGRATION, WE MIGHT EXPECT THE POPULATION TO DECREASE IN THE FUTURE DECADES. HOWEVER, IT WILL LIKELY BE SEVERAL YEARS BEFORE ANYTHING CAN CONFIDENTLY BE SAID ABOUT THESE TRENDS.

ORLEANS POPULATION PROJECTION, 2000-2050

Source: UMass Donahue Institute

