The Housing Indicator Tool 4.0
How do we remove the barriers to accessing quality, safe, affordable housing in our region?
What will it take to meet the needs of all residents who call our region home?
How can we redesign the inequitable systems that have gotten us to where we are now?
The Housing Indicator Tool

- **Accountability tool** towards meeting regional housing production and preservation goals
- Outlines a good **housing toolkit** and what policies are being deployed in each jurisdiction
- Links **housing and racial equity**
- **Calls to Action** for ALL sectors
Where it began: A Regional Commitment to Affordability

374k net new housing units needed between 2015 and 2030 in Metropolitan Washington, of which 77% should be affordable to middle-income households and below.
Where we are now: Expanded Reach and Granular Needs

The tool now includes HAND’s full footprint: Greater DC, Greater Baltimore, and Greater Richmond.

The goals in the HIT, calculated by Urban, are estimated net new housing units needed based on local household growth projections.
The demand the tool intends to meet

Local and regional lens

The HIT not only demonstrates how the region is collectively faring, but also how things are progressing at the local level.

Education and advocacy

By calling attention to the ways housing policy has created the racial and class divides we see today and the racial disparities in affordable housing in our region and locally, the HIT is a resource for learning and advocacy.
How people are leveraging the tool

Developing Understanding

“How HIT provides a better understanding of various jurisdictions' priorities and commitments, which is helpful to us nonprofit developers as we explore where to place our limited resources.”

“I’m using HIT to develop responsible and informed policy in Baltimore City.”

Advocating

“I use the HIT tool in advocacy letters to push our elected leaders to build more affordable housing for those who need it.”

Casemaking

“The HIT is my one-stop shop for helping new advocates access data that can assist them in supporting more housing affordability goals, programs, and resources in their communities.”
The evolution of the HIT

**HIT 1.0**
- The first of its kind
- DC Metro Region
- Policy status for each jurisdiction
- Housing outcomes by income range

**HIT 2.0**
- Asking deeper questions to better understand the need
- New questions for jurisdictions on production and preservation trends
- Increased racial equity focus
- Additional clarity on housing policies

**HIT 3.0**
- Expanding the tool and exploring new policies
- Environmental Justice indicators and policies
- Deeper dive on homeownership
- Introducing Baltimore jurisdictions
HIT 4.0
Key components of the tool

Landing Page

How Do We Remove The Barriers To Accessing Quality, Safe, Affordable Housing In Our Region?

The HIT is a platform that tracks local jurisdictions’ housing production and preservation in the Capital Region to help stakeholders create paths for removing obstacles to opportunity and supporting housing stability.

Dashboards

Housing Outcomes
Local jurisdictions submitted data to enable the region to track housing production, preservation, and rental affordability.

Amount of Housing
Number of units built by type

Affordability of Housing
Share of units affordable to households with low incomes
What's New?

Streamlined look and feel

Regional Dashboards

Potential homebuyers by race
Regional Dashboards

Greater DC

Fast Facts:
- The Greater DC region was home to 5,674,126 people and had 2,281,938 housing units in 2022. Since 2010, Greater DC has added an average of 51,200 people and 22,200 housing units per year.
- Thirty-eight percent of households were renters and 47% percent of renters had unaffordable housing costs.
- Greater DC did not meet the annual production target of 25,013 units, with 21,925 new units built in 2023. Cumulatively, Greater DC has produced at least 108,765 units since 2019, short of its 5-year target of 135,065.
- Greater DC includes the District of Columbia; Charles, Frederick, Montgomery, and Prince George’s counties and the cities of Gaithersburg and Rockville in Maryland; Arlington, Fairfax, Loudoun, and Prince William counties and the cities of Fairfax, Falls Church, Manassas, and Manassas Park in Virginia. All jurisdictions except Manassas Park share data for the HIT.

Sources: Census Population and Housing Unit Estimates, Decennial Census, American Community Survey (2018-22), and the HIT survey of local jurisdictions.
Calls to Action

Do more than make a statement, make a difference

1. Track your Jurisdiction with HIT
   Knowledge is power. Learn about the housing needs in your jurisdiction, what policies and practices are in place, and what progress has been made towards meeting the need.
   
   View Dashboards

2. Uniquely leverage your organization
   Every individual and organization has a role to play in creating a more equitable Capital Region. Take a look at ways you can act today.
   
   Explore Calls to Action

3. Email your elected officials
   Use this template to email your elected officials about the importance of prioritizing the housing targets. Check out your jurisdiction’s dashboard to customize your letter and locate contact information.
   
   Access the Template Email

4. Attend an Activation
   Join us for activation events with speakers representing the various sectors and stakeholders in the housing ecosystem that explore how jurisdictions and industry professionals are responding to our region’s housing needs.
   
   View Upcoming Activations
What are the 2023 results?
Overall housing production fell for most jurisdictions in 2023

Total New Housing Units Produced, 2022-2023

Note: City of Baltimore did not report total units in 2023.
Source: HIT Survey of Local Jurisdictions
Six jurisdictions produced at least 80% of annual unit goal

New Units as a Percent of Estimated Annual Unit Goal by Jurisdiction, 2023

- Falls Church City: 251
- Arlington County: 160
- District of Columbia: 139
- Frederick County: 114
- Montgomery County: 95
- Greater DC: 85
- Fairfax County: 85
- Loudoun County: 71
- Howard County: 71
- Anne Arundel County: 71
- Prince George's County: 49
- City of Alexandria: 45
- Baltimore County: 39
- Fairfax City: 39
- Greater Baltimore: 36
- Prince William County: 36
- Charles County: 36
- Annapolis: 21
- Manassas City: 20
- Rockville: 13

Source: HIT Survey of Local Jurisdictions
Over 3,600 affordable units added across the region - well short of need

Number of New Committed Affordable Units Built by Affordability Level, 2023

Source: HIT Survey of Local Jurisdictions
About 15 percent of new units were affordable in 2023

Source: HIT Survey of Local Jurisdictions

Percent of New Units Affordable to Households with 80% of Area Median Income and Below, 2023

- Howard County: 43%
- Prince George’s County: 30%
- Fairfax County: 22%
- Montgomery County: 15%
- District of Columbia: 12%
- Baltimore County: 12%
- Falls Church City: 8%
- Fairfax City: 6%
- Loudoun County: 6%
- Arlington County: 5%
- City of Alexandria: 5%
- Frederick County: 3%
- Anne Arundel County: 0%
Less than 2,850 units were reported as preserved in 2023, far fewer than 2022

Number of Affordable Units that were Preserved by Type, 2023

- Montgomery County: 1,405 Subsidized Units, 322 Unsubsidized Units
- District of Columbia: 322 Subsidized Units, 504 Unsubsidized Units
- Prince George's County: 500 Subsidized Units
- Fairfax County: 106 Subsidized Units, 6 Unsubsidized Units
- Arlington County: 35 Subsidized Units
- Falls Church City: 9 Subsidized Units

Source: HIT Survey of Local Jurisdictions
Nearly 30,000 affordable units are in the pipeline or under construction

Number of Affordable Units Under Construction or in the Pipeline, 2023

- District of Columbia
- Montgomery County
- Loudoun County
- Fairfax County
- Prince George's County
- City of Alexandria
- Arlington County
- Frederick County
- Rockville
- Anne Arundel County
- Prince William County
- Baltimore County

Source: HIT Survey of Local Jurisdictions
Note: Falls Church, Fairfax City, and Annapolis also have a combined 232 units in the pipeline or under construction.
Meeting the region’s housing needs requires policies to preserve, produce, and protect

<table>
<thead>
<tr>
<th>Category</th>
<th>Policy</th>
<th>All (N=20)</th>
<th>Greater DC (N=15)</th>
<th>Greater Baltimore (N=5)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preserve</td>
<td>Homebuyer assistance</td>
<td>19</td>
<td>14</td>
<td>5</td>
</tr>
<tr>
<td>Produce</td>
<td>Inclusionary housing</td>
<td>16</td>
<td>12</td>
<td>4</td>
</tr>
<tr>
<td>Protect</td>
<td>Locally-funded emergency rental assistance</td>
<td>14</td>
<td>9</td>
<td>5</td>
</tr>
<tr>
<td>Protect</td>
<td>Climate Action Plan</td>
<td>12</td>
<td>9</td>
<td>3</td>
</tr>
<tr>
<td>Preserve</td>
<td>Right of First Refusal</td>
<td>12</td>
<td>10</td>
<td>2</td>
</tr>
<tr>
<td>Produce</td>
<td>Prioritize Public Land</td>
<td>12</td>
<td>7</td>
<td>5</td>
</tr>
<tr>
<td>Protect</td>
<td>Outreach on Flood Insurance</td>
<td>10</td>
<td>7</td>
<td>3</td>
</tr>
<tr>
<td>Produce</td>
<td>Housing Trust Fund (Dedicated Source)</td>
<td>10</td>
<td>8</td>
<td>2</td>
</tr>
<tr>
<td>Protect</td>
<td>Locally-funded Vouchers</td>
<td>8</td>
<td>6</td>
<td>2</td>
</tr>
</tbody>
</table>
What progress has the Greater DC area made? 2019-2023
Greater DC produced nearly 109,000 units in the last 5 years

Total Housing Units Produced, Greater DC Area, 2019-23

Source: HIT Survey of Local Jurisdictions
DC accounted for nearly a third of total production; Loudoun + Fairfax + Montgomery another third

Total Housing Units Produced, Greater DC Area, 2019-23

<table>
<thead>
<tr>
<th>Jurisdiction</th>
<th>Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>District of Columbia</td>
<td>33,534</td>
</tr>
<tr>
<td>Loudoun County</td>
<td>12,458</td>
</tr>
<tr>
<td>Fairfax County</td>
<td>12,197</td>
</tr>
<tr>
<td>Montgomery County</td>
<td>11,693</td>
</tr>
<tr>
<td>Arlington County</td>
<td>9,896</td>
</tr>
<tr>
<td>Frederick County</td>
<td>8,665</td>
</tr>
<tr>
<td>City of Alexandria</td>
<td>6,655</td>
</tr>
<tr>
<td>Prince George's County</td>
<td>5,576</td>
</tr>
<tr>
<td>Prince William County</td>
<td>3,345</td>
</tr>
<tr>
<td>Charles County</td>
<td>2,097</td>
</tr>
<tr>
<td>Falls Church City</td>
<td>924</td>
</tr>
<tr>
<td>City of Gaithersburg</td>
<td>849</td>
</tr>
<tr>
<td>Fairfax City</td>
<td>771</td>
</tr>
<tr>
<td>Manassas City</td>
<td>78</td>
</tr>
<tr>
<td>Rockville</td>
<td>27</td>
</tr>
</tbody>
</table>

Source: HIT Survey of Local Jurisdictions
Six jurisdictions exceeded production targets and 2 very close to target

Total Housing Units Produced as a Percent of Target, Greater DC Area, 2019-23

Source: HIT Survey of Local Jurisdictions
About 70% of new units were multifamily

Percentage of Units Built by Type, Greater DC Area, 2019-23

Source: HIT Survey of Local Jurisdictions
Greater DC produced 13,522 new committed affordable units in the last 5 years

New Committed Affordable Units by Affordability Level, Greater DC Area, 2019-23

<table>
<thead>
<tr>
<th>Year</th>
<th>0-30% of AMI</th>
<th>30-50% of AMI</th>
<th>50-80% of AMI</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>251</td>
<td>983</td>
<td>2,044</td>
</tr>
<tr>
<td>2020</td>
<td>198</td>
<td>399</td>
<td>1,392</td>
</tr>
<tr>
<td>2021</td>
<td>186</td>
<td>754</td>
<td>2,013</td>
</tr>
<tr>
<td>2022</td>
<td>235</td>
<td>588</td>
<td>1,706</td>
</tr>
<tr>
<td>2023</td>
<td>247</td>
<td>521</td>
<td>1,830</td>
</tr>
</tbody>
</table>

Note: 175 committed affordable units in 2019 have unknown affordability levels.
Source: HIT Survey of Local Jurisdictions
DC and Arlington stand out on affordable housing production

Committed Affordable Housing Units Produced as a Percent of Target, Greater DC Area 2019-23

District of Columbia: 60%
Arlington County: 35%
Montgomery County: 26%
Falls Church City: 25%
City of Alexandria: 20%
Loudoun County: 18%
Fairfax County: 15%
Fairfax City: 14%
Rockville: 14%
Prince George's County: 12%
Frederick County: 10%
City of Gaithersburg: 8%

Source: HIT Survey of Local Jurisdictions
Note: Committed affordable units are those that have income or rent restrictions and are affordable to households with incomes of less than 80% of the Area Median Income.