

Workforce Housing Action Plan

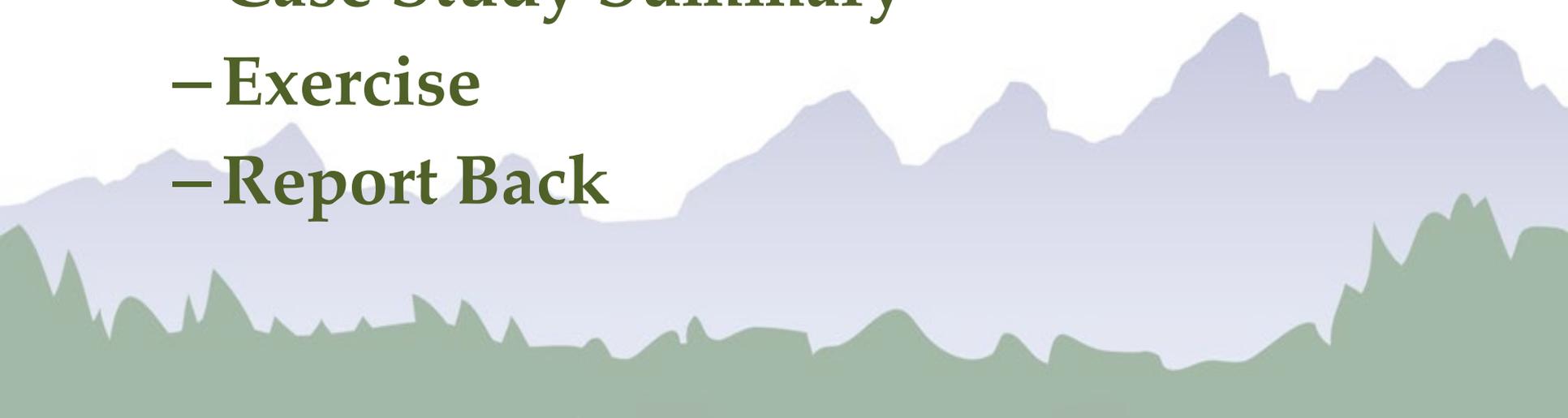
October - November 2013

A stylized graphic of a mountain range. The foreground features dark green, jagged silhouettes of trees or low mountains. Behind this, a range of light purple mountains is depicted. The background is a light blue gradient.

Jackson Teton County

COMPREHENSIVE PLAN & LAND DEVELOPMENT REGULATIONS

Agenda

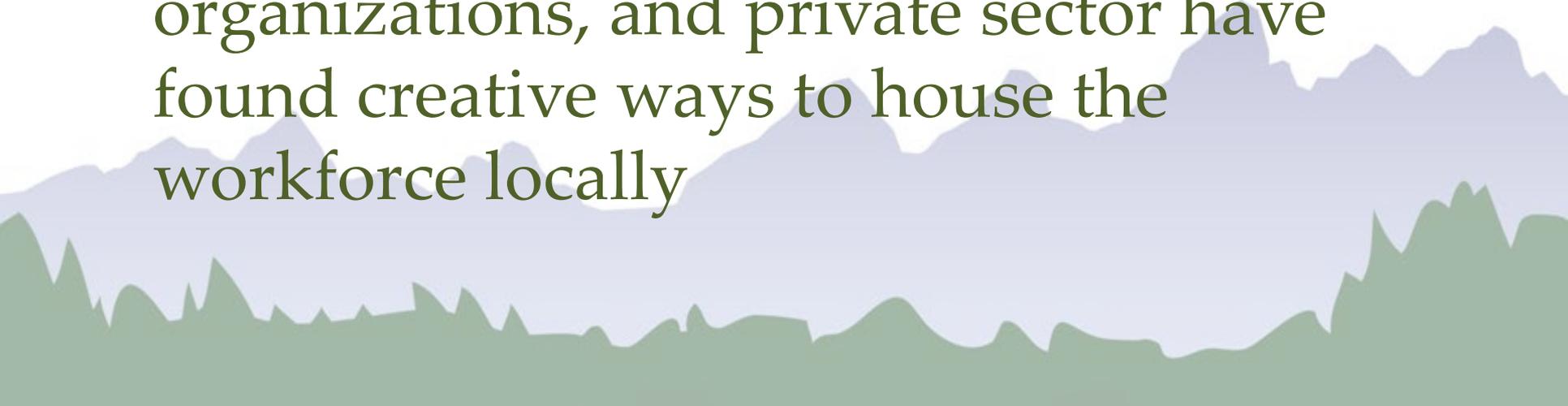
- **Welcome & Introduction**
 - **Action Plan Goals**
 - **Housing Objectives**
 - **Core Strategies**
 - **Case Study Summary**
 - **Exercise**
 - **Report Back**
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- A decorative silhouette of a mountain range is positioned at the bottom of the slide. The mountains are rendered in two shades: a light purple/lavender color for the upper peaks and a dark green color for the lower slopes and valleys. The silhouette spans the entire width of the slide.

Apartments
Commercial Linkages
Residential Accessory Units
Guest Houses
Commercial Accessory Units
Density Bonuses
Employers
Federal Programs
Senior Housing
Commercial Mitigation
Residential Linkages
TDRs
Incentives (Voluntary Units)
Live/Work
Housing Providers
Preservation of Existing Housing Stock
Public Funding
Collaborative Education Campaign
Reduce Regulatory Barriers
Streamline Stewardship

INTRODUCTION



Introduction

- Providing workforce housing is not a new challenge
 - Concern of local businesses for more than 50 years
 - Employers, the government, housing organizations, and private sector have found creative ways to house the workforce locally
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Introduction

- Currently, the community is housing:
 - over 65% of the workforce locally
 - with 1,500 restricted units, and
 - many market opportunities

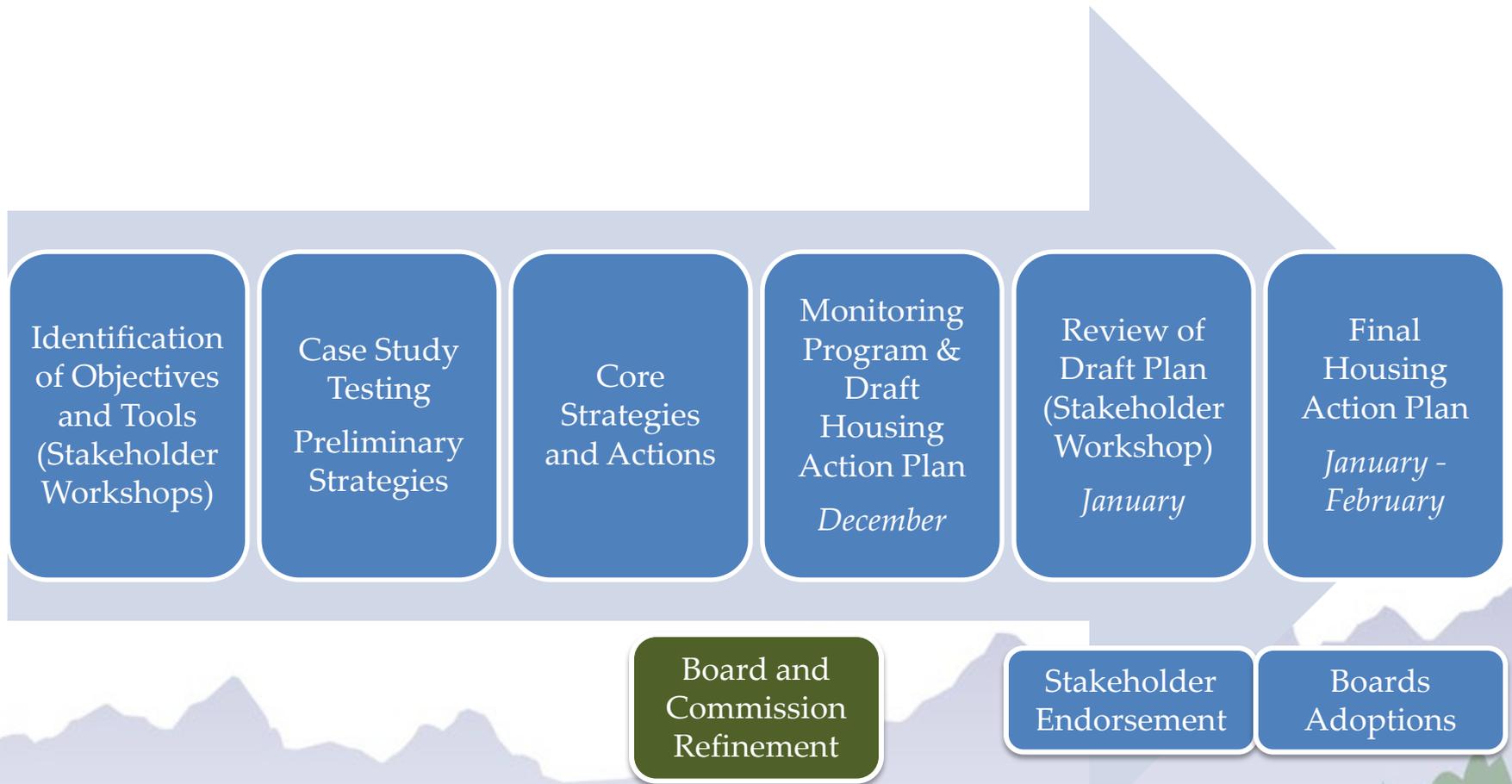


Introduction

To maintain our community goal, we see the following challenges:

1. An aging workforce – or retirement in existing workforce housing stock
 2. Loss of market workforce housing stock (leakage)
 3. Employees generated from new development
 4. Affordability of market housing
 5. Inadequate local workforce housing supply
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- A decorative graphic at the bottom of the slide consisting of a jagged, mountain-like silhouette. The top portion is light purple, and the bottom portion is a darker greenish-grey.

Action Plan Process



Action Plan Components



Action Plan Introduction

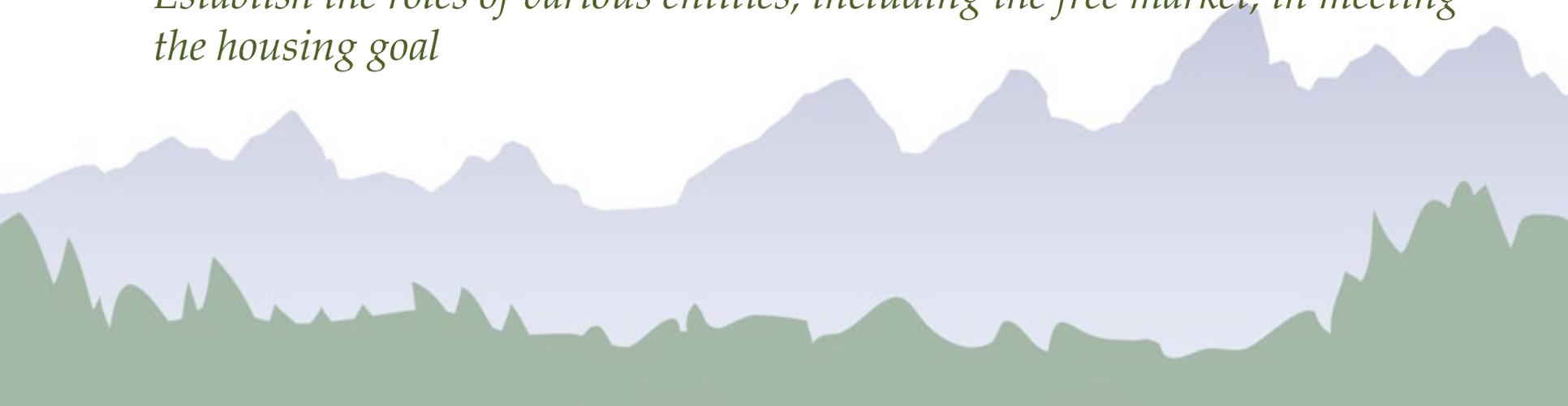
The Principles in the Comprehensive Plan that provide specific direction for this Action Plan are:

- *Principle 5.1 - Maintain a diverse population by providing workforce housing*
- *Principle 5.2 - Strategically locate a variety of housing types*
- *Principle 5.3 - Reduce the shortage of housing that is affordable to the workforce*
- *Principle 5.4 - Use a balanced set of tools to meet our housing goal*

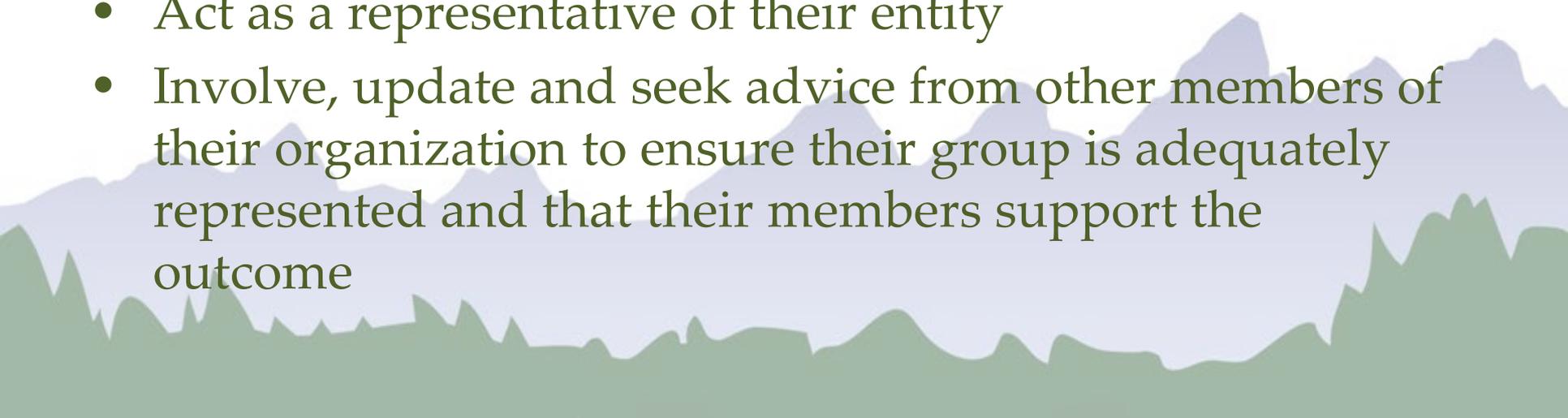


Action Plan Introduction

In particular, Policy 5.4.a: directs the creation of a community housing implementation plan or key action plan. This Action Plan is to be a coordinated effort of the Town, County, all local housing agencies and organizations, and other workforce housing stakeholders. It is to accomplish the following:

- *Evaluate the costs and benefits of various housing tools*
 - *Establish a system for monitoring the success of tools in meeting our housing goal*
 - *Establish the roles of various entities, including the free market, in meeting the housing goal*
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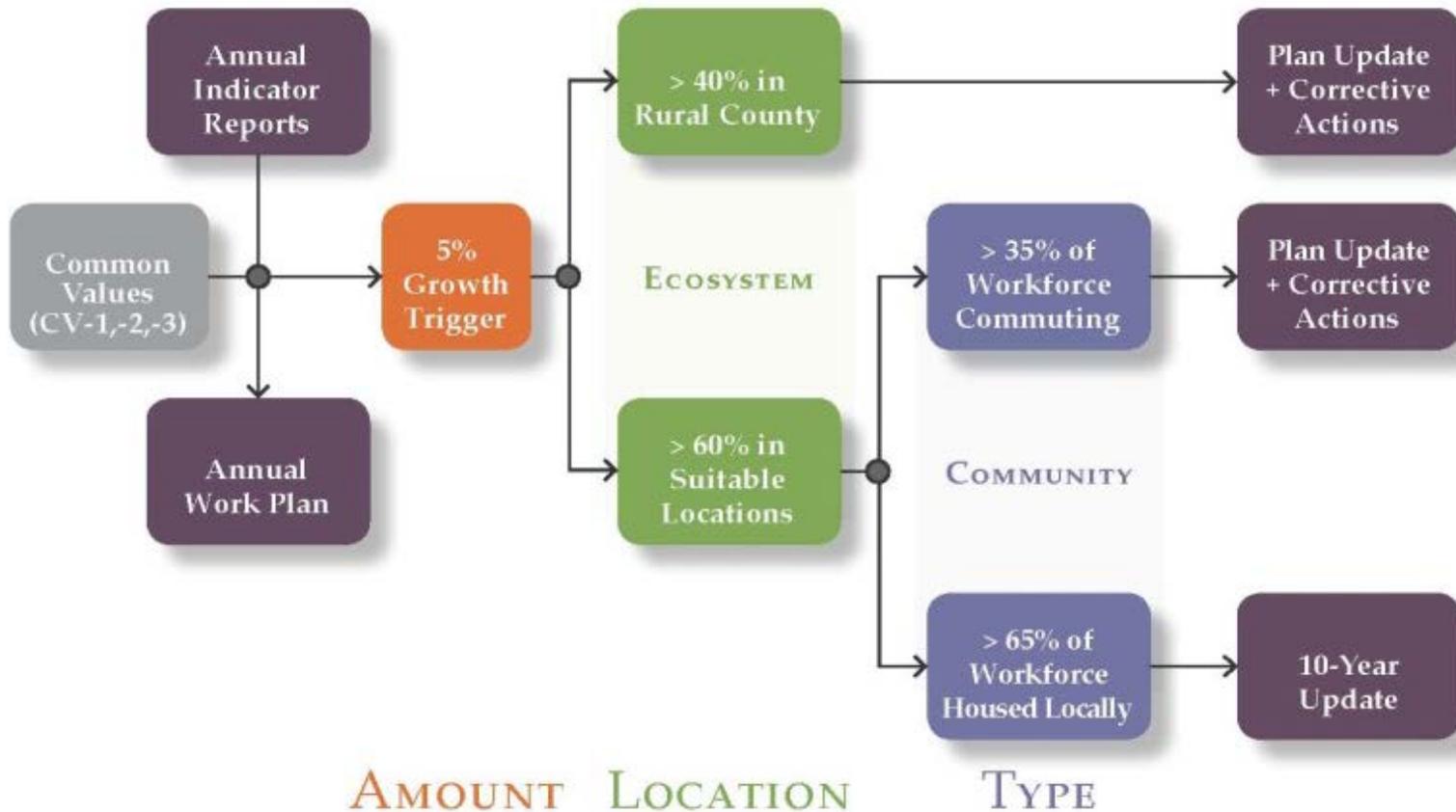
Role of the Stakeholder

- Assist in evaluating the costs and benefits of specific workforce housing programs and initiatives
 - Help understand implementation challenges and identify solutions
 - Recommend a practical system for monitoring success
 - Assist in establishing the roles and responsibilities of the various entities
 - Act as a representative of their entity
 - Involve, update and seek advice from other members of their organization to ensure their group is adequately represented and that their members support the outcome
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Stakeholders

- Ed Cheramy – Property Rights, Market Solutions
 - Anne Cresswell – Housing Trust
 - Jeff Daugherty – County Planning Department
 - Scott Horn – Large Employer
 - Adam Janak – Town Planning Commission
 - Kelly Lockhart – Conservationist, Land Owner
 - Hailey Morton – Town Council
 - Glenn Myers – Pioneer Homestead
 - Brendan Schulte – Habitat for Humanity
 - Brian Siegfried – Housing Authority
 - Tyler Sinclair – Town Planning Department
 - Smokey Rhea – Social Service
 - Patricia Russell – County Planning Commission, Teton County School District
 - Stephanie Thomas – Social Service, Small Employer
 - Melissa Turley – County Commission
 - Amanda Witte – Medium Employer
 - Melissa Wittstruck - Resource
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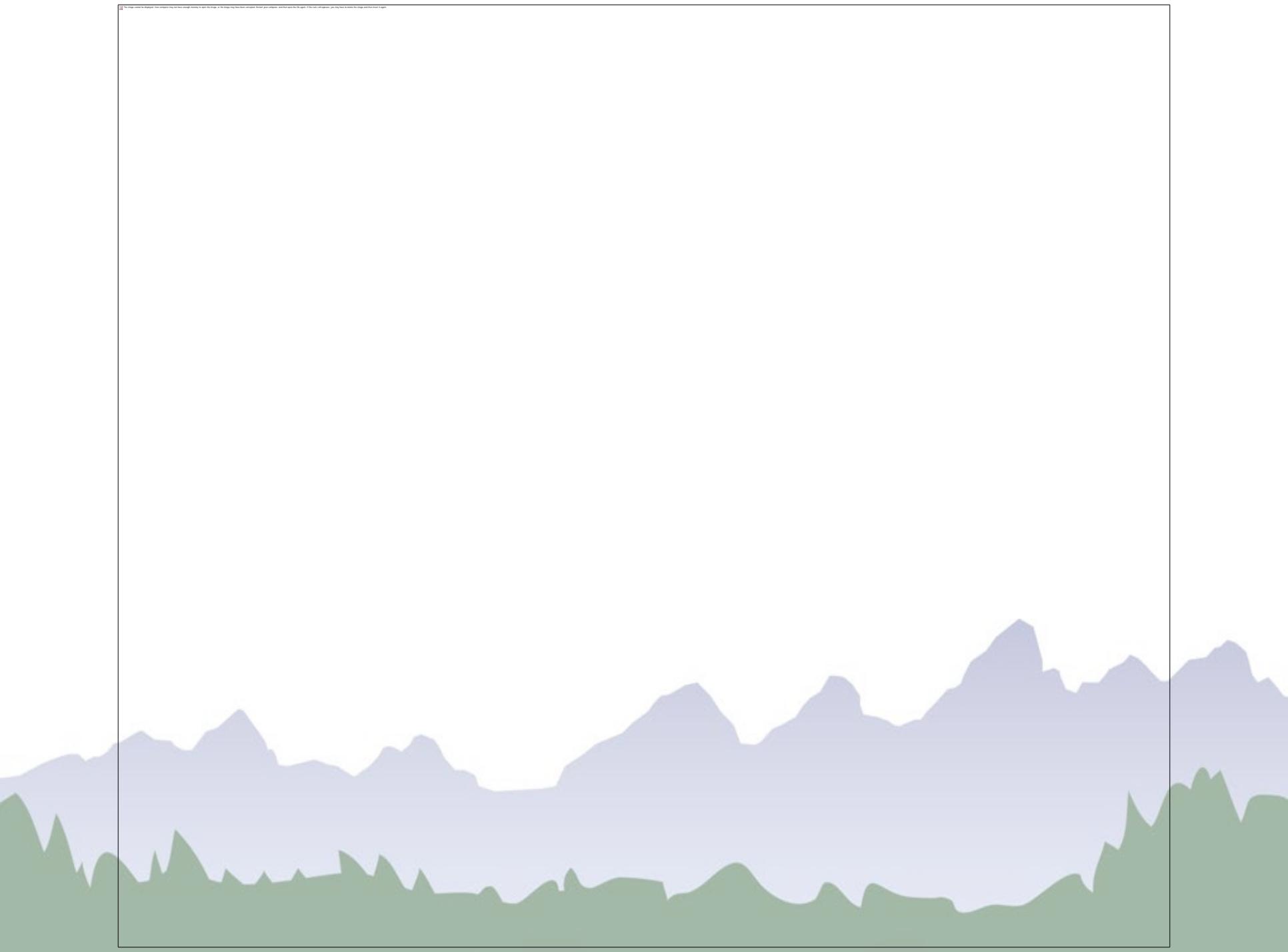
Relationship to Comp Plan

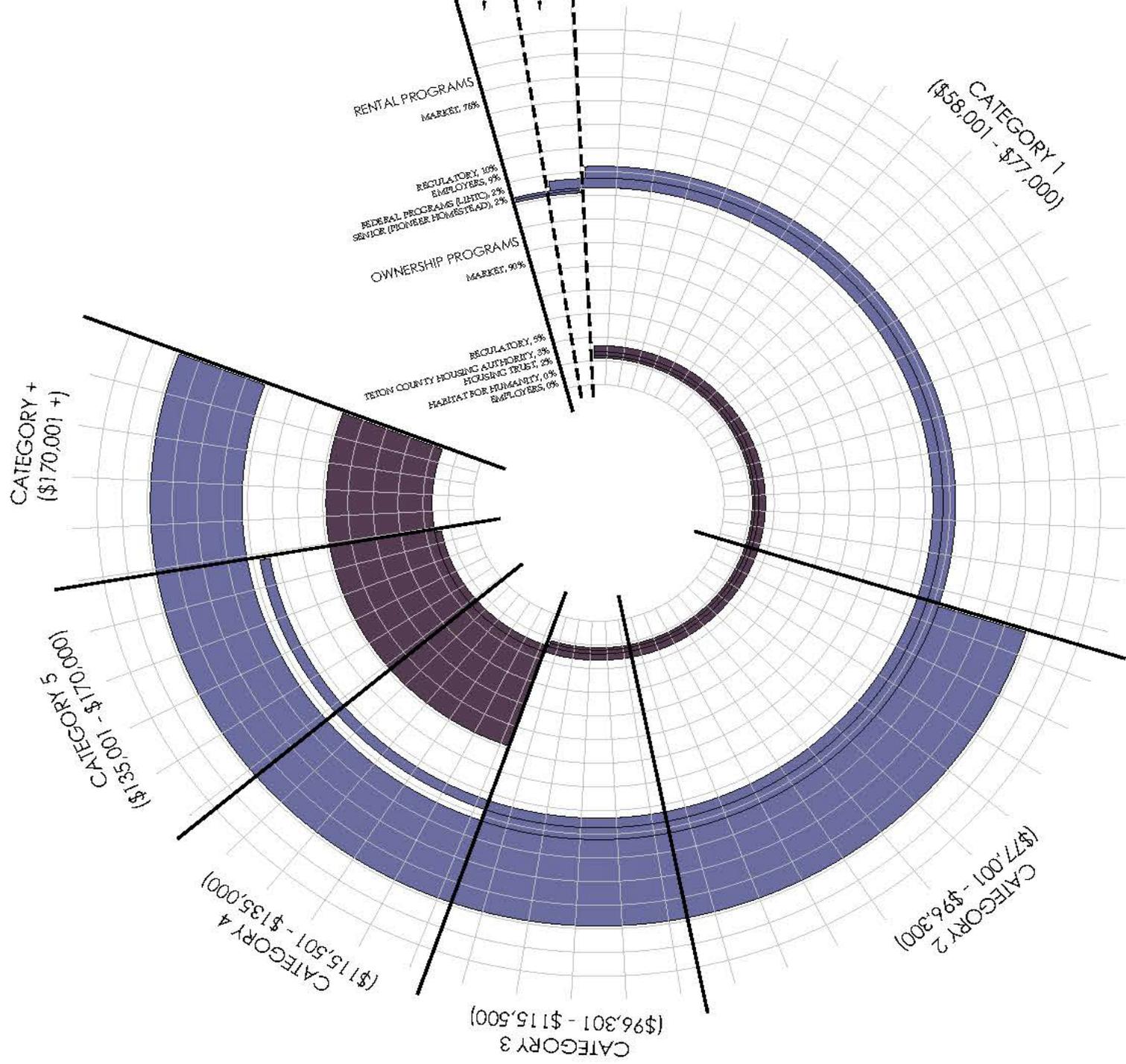


Housing Spectrum

Create a balanced approach to
shift our housing spectrum
to meet the goals of the
Comprehensive Plan







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HOUSING OBJECTIVES



Housing Plan Objectives

1. Number of Units (Pace of Development)

Keep pace with new market residential unit production (90 – 140 units) plus projected loss of housing stock to retirees.

*Keep pace with new job generation from residential and commercial production **plus projected loss** of workforce housing stock to retirees, non-local residents, lodging, demolition, redevelopment, etc. Track pace of workforce housing development annually in monitoring plan.*



Housing Plan Objectives

Create workforce housing market solutions to the largest extent possible. Historically, the market has been unproductive at providing ownership opportunities below 120% AMI and rental product below 80% AMI. Restricted housing programs should target these underserved markets with attention focused on the lower income targets.

2. Income Targets

*Create opportunities for workforce **housing market solutions to the largest extent possible**. Historically, the market has been unproductive at providing ownership opportunities below 120% AMI and rental product below 80% AMI. **Publicly subsidized housing programs should target these underserved markets** with attention focused on the lower income ranges.*

Housing Plan Objectives

Continue to prioritize critical service providers in the publicly subsidized housing programs. Additionally, the selection process for the publicly subsidized housing programs should be objective, equitable, and prioritize years working in valley, time looking for a home, and bedroom size. Employers should be encouraged to provide housing in accordance with their priorities.

3. Workforce Priorities

*Continue to **prioritize critical service providers** in the publicly subsidized housing programs. Additionally, the selection process for the publicly subsidized housing programs should be objective, equitable, and prioritize years working in valley, time looking for a home, and bedroom size. Employers should be encouraged through technical assistance and other incentives to provide housing in accordance with their priorities.*

Housing Plan Objectives

Strive for an equal mix of ownership and rental product to meet employer priorities for rental housing and entry-level for-sale housing for year-round employees.

4. Owner/ Renter Mix

Strive for an equal mix of ownership and rental product to meet employer priority for rental housing and entry-level for-sale housing for year-round employees. A higher percentage of rental units for seasonal workers and a higher percentage of ownership units for year-round workers will better suit their respective needs and be more cost effective to construct.

Housing Plan Objectives

As smaller units (studios and 1-bedrooms) have historically been successfully provided by the market, encourage this type of development and promote the production of larger units in the restricted or publicly subsidized housing inventory.

5. Bedroom Mix

Encourage a mix of bedrooms to serve different segments of the workforce across the spectrum. In other words, an equal mix of bedrooms in the lower income ranges as well as the higher levels. Publicly subsidized units should include larger units (2+ bedrooms) as the emphasis with this product is year-round employees and allows greater movement within workforce housing programs.

Housing Plan Objectives

6. Type/ Quality Design

Continue to provide a variety of housing types that fit within the existing character of the neighborhood. Address inadequate market workforce housing stock.

Continue to provide a variety of housing types that fit within the existing character of the neighborhood. Address inadequate market workforce housing stock.

7. Location

Locate workforce housing as identified in the Comp Plan Character Districts.

Locate workforce housing within complete neighborhoods according to the Character District.

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HOUSING TOOLS



Housing Tools

Apartments

Commercial Mitigation

Residential Accessory Unit

Guest Houses

Commercial Accessory Units

Density Bonuses

Employers

Federal Programs

Senior Housing

Market

Residential Inclusionary (PRDs)

Residential Linkages

TDRs

Incentives

Live/ Work

Housing Providers

Preservation of Existing Housing
Stock

Public Funding

Collaborative Education
Campaign

Reduce Regulatory Barriers

Streamline Stewardship

Tools That We Are Working On

- Employers
 - Public/ Private
 - Empower Employers
 - Housing Providers
 - Market
 - Incentives
 - Density Bonuses
 - Incentives
 - Commercial Linkages
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CASE STUDY



Case Study Objective

Review existing and potential workforce housing tools - and apply them to a scenario to develop a balanced range of strategies to achieve the Comprehensive Plan's housing goals.



Cowboy Western Motel Redevelopment

Long-time owners, Nick and Margaret Hanson, of the Western Cowboy Motel have been approached by California Big Development to redevelop their two-story motel into a three story hotel with underground parking, conference space, retail shops, and a bar/restaurant (mixed-use building).

The owners currently employ 10 workers full-time that have on average worked at the motel for over 15 years. The owners provide a two bedroom apartment on-site for the maintenance manager and head housekeeper, Jose Hernandez and his wife Maria and their two young daughters. The Hanson's have also helped two other long-time employees with down payments on a trailer and a small condo in town. The Hanson's purchased a lot in Cottonwood Park in the late 80's and built a house there where they raised their three kids.

Andrew, their eldest son, a recent graduate in Hotel Management from UW, plans to move back to Jackson and act as General Manager of the new hotel to allow his parents to retire in five years. He recently married Linda, his high school sweetheart, and they are expecting their first child in six months. Linda plans to volunteer full-time at the Children's Learning Center when they return to Jackson this fall, but hopes to transition to part-time once their baby is born.

How to house the employees generated by this development consistent with the Comp Plan and Action Plan Objectives.

Common Themes

1. Balanced approach using multiple tools
 2. Programs included restricted and private market solutions
 3. Need regulatory or market changes for private market to work
 4. Developer-provided housing as on-site rentals
 5. Continue and refine mitigation requirements
 6. Focus public subsidies and mitigation on lower income spectrums
 7. Secure a stable funding source
 8. Educate our community on the importance of housing strategies
- 

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HOUSING STRATEGIES



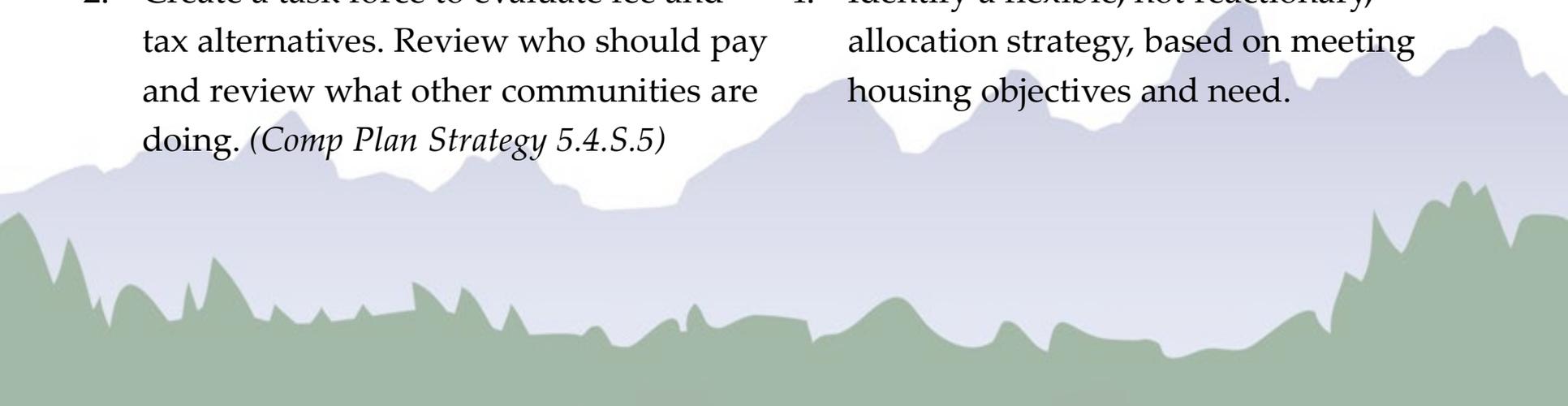
Education

COLLABORATIVELY CREATE A LONG-TERM PLAN TO EDUCATE THE COMMUNITY ABOUT THE IMPORTANCE OF WORKFORCE HOUSING. FOCUS ON THE RELATIONSHIP TO ECONOMIC DEVELOPMENT AND INCORPORATE KEY AUDIENCES SUCH AS EMPLOYERS AND DEVELOPERS.

1. Research perceptions of various target audiences.
2. Develop 3 - 4 concept statements and test them with focus groups to determine effectiveness.
3. Quantify the need to tell the real story.
4. Develop a campaign to teach different target markets about the value and need for workforce housing and the Action Plan.
5. Educate all elected officials on the housing problem.
6. Find and market compelling stories for media campaign.
7. Establish a Committee to help implement action items.
8. Create a brochure/ handout illustrating where the money has come from in the past, what it funded, how it was allocated, success, etc.

Funding

ESTABLISH A SECURE FUNDING SOURCE AFTER ANALYSIS OF VIABLE OPTIONS. CREATE A HOUSING FUND TO MANAGE FUNDS AND ALLOCATE TO ALL HOUSING PROVIDERS BASED ON CRITERIA WHICH ACCOMPLISH THE HOUSING OBJECTIVES AND ON FEE FOR SERVICES SUCH AS STEWARDSHIP OF RESTRICTED UNITS.

1. Determine how much funding is needed annually for the Housing Fund, based on benchmarks, and a clearly defined purpose and need.
 2. Create a task force to evaluate fee and tax alternatives. Review who should pay and review what other communities are doing. (*Comp Plan Strategy 5.4.S.5*)
 3. Create a task force to evaluate the appropriate organizational structure of the Housing Fund. Review the legal ramifications and organizational accountability of public funds.
 4. Identify a flexible, not reactionary, allocation strategy, based on meeting housing objectives and need.
- 

Collaboration

MATCH SKILLS AND RESOURCES WITH NEEDS.

1. Evaluate who is doing what to determine if there can be an increase in efficiencies and services to meet Plan goals. Include within this analysis all of those resources listed above.
2. Consolidate and centralize all data collection and monitoring under one entity
3. Identify best practices for funding, and look at the differences between existing housing stock vs. new housing stock.



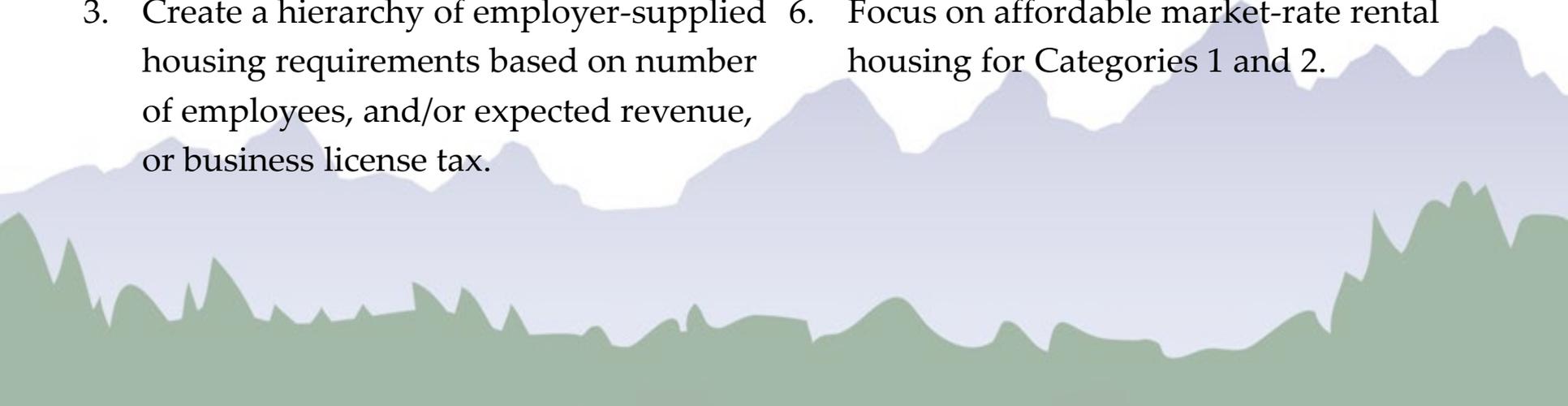
Production

ENABLE ALL HOUSING PROVIDERS TO CREATE WORKFORCE HOUSING OPPORTUNITIES AT EVERY LEVEL OF THE SPECTRUM AND WITH A VARIETY OF UNIT TYPES INTEGRATED WITHIN COMPLETE NEIGHBORHOODS.

1. Comp Plan Strategy 5.4.S.4: *Evaluate and update existing workforce housing incentives.*
2. Comp Plan Strategy 5.3.S.2: *Update current mitigation requirements as necessary. Housing Regulations in the LDRs both commercial mitigation and residential mitigation.*
3. Comp Plan Strategy 5.4.S.3: *Evaluate and update LDRs to remove barriers and provide appropriate exemptions for the provision of workforce housing. (i.e. parking)*
4. Comp Plan Strategy 5.2.S.2: *Evaluate and update guesthouse and accessory residential unit regulations.*
5. Identify Town-directed initiatives or incentives for infill development projects.
6. Encourage elected officials to implement the key areas of density within the Town and County per the Character Districts.
7. Review and update construction standards for restricted properties contained in TCHA Guidelines.

Production (continued)

ENABLE ALL HOUSING PROVIDERS TO CREATE WORKFORCE HOUSING OPPORTUNITIES AT EVERY LEVEL OF THE SPECTRUM AND WITH A VARIETY OF UNIT TYPES INTEGRATED WITHIN COMPLETE NEIGHBORHOODS.

1. Increase reliance on developers and employers to provide workforce housing.
 2. Create an Employer Assisted (EAH) program to provide technical assistance to employers to meet the specific needs of their employees.
 3. Create a hierarchy of employer-supplied housing requirements based on number of employees, and/or expected revenue, or business license tax.
 4. Focus on achieving a balance between free-market units and restricted units.
 5. Utilize the free market to provide housing for higher incomes (Category 3 and up).
 6. Focus on affordable market-rate rental housing for Categories 1 and 2.
- 

Preservation

PRESERVE EXISTING WORKFORCE HOUSING STOCK AND ENSURE THAT IT MEETS ADEQUACY, SUITABILITY AND AFFORDABILITY STANDARDS.

1. Further explore best practices utilized in other resort communities to preserve existing workforce housing stock and examine if and how they could be implemented locally. Comp Plan Policy 5.3.b.
 2. Establish adequacy and suitability standards.
 3. Implement and enforce adequacy and suitability standards for rental properties.
 4. Create a map or inventory of areas that currently house working households and that are prone to leakage. Prioritize preservation efforts based on the inventory.
 5. Evaluate cost of preservation vs. production of new inventory
- 

Stewardship

ENSURE THAT THE RESTRICTED INVENTORY IS PROPERLY MAINTAINED FOR USE BY MANY GENERATIONS AND ARE UTILIZED AS INTENDED. MAKE CERTAIN THAT THE MANAGEMENT OF RESTRICTED UNITS IS EFFICIENT AND PROPERLY FUNDED.

1. Explore the pros/cons of a “one stop shop” for ownership opportunities.
 2. Explore the pros/cons of a “one stop shop” for rental opportunities.
 3. Comp Plan Strategy 5.4.S.2: Evaluate the appropriate governmental structure of TCHA.
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Monitoring

**ACCURATELY AND COST EFFECTIVELY TRACK AND MONITOR THE WORKFORCE
AND ITS ASSOCIATED HOUSING UNITS ANNUALLY.**

1. Determine core data needs.
2. Establish a cost effective and timely manner to collect data.
3. Monitor Comp Plan Indicators annually, including:
 - Workforce Housing %
 - Affordability of Housing
 - Workforce Housing Stock
 - Jobs, Housing Balance



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EXERCISE

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Exercise

Exercise

- Review and discuss refinements and details related to the draft strategies.

Results

- Following this exercise, groups will report back their discussions.
- Following this meeting, the groups' conversations will be reported back to the Action Plan Stakeholder Group.

The discussion is important, not consensus.

Be respectful by letting everyone talk.

Be nice to your facilitator.



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REPORT BACK



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NEXT STEPS



Next Steps

Mid-November through December:

- *Development of the Action Plan*

Early January:

- *Draft Action Plan Distributed to Stakeholders*

Mid-January:

- *Stakeholder Meeting #4, Red Flag Discussion on Action Plan & Endorsement With or Without Changes*

Mid- January through Mid-February:

- *Presentation for Adoption*
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Workforce Housing Action Plan

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