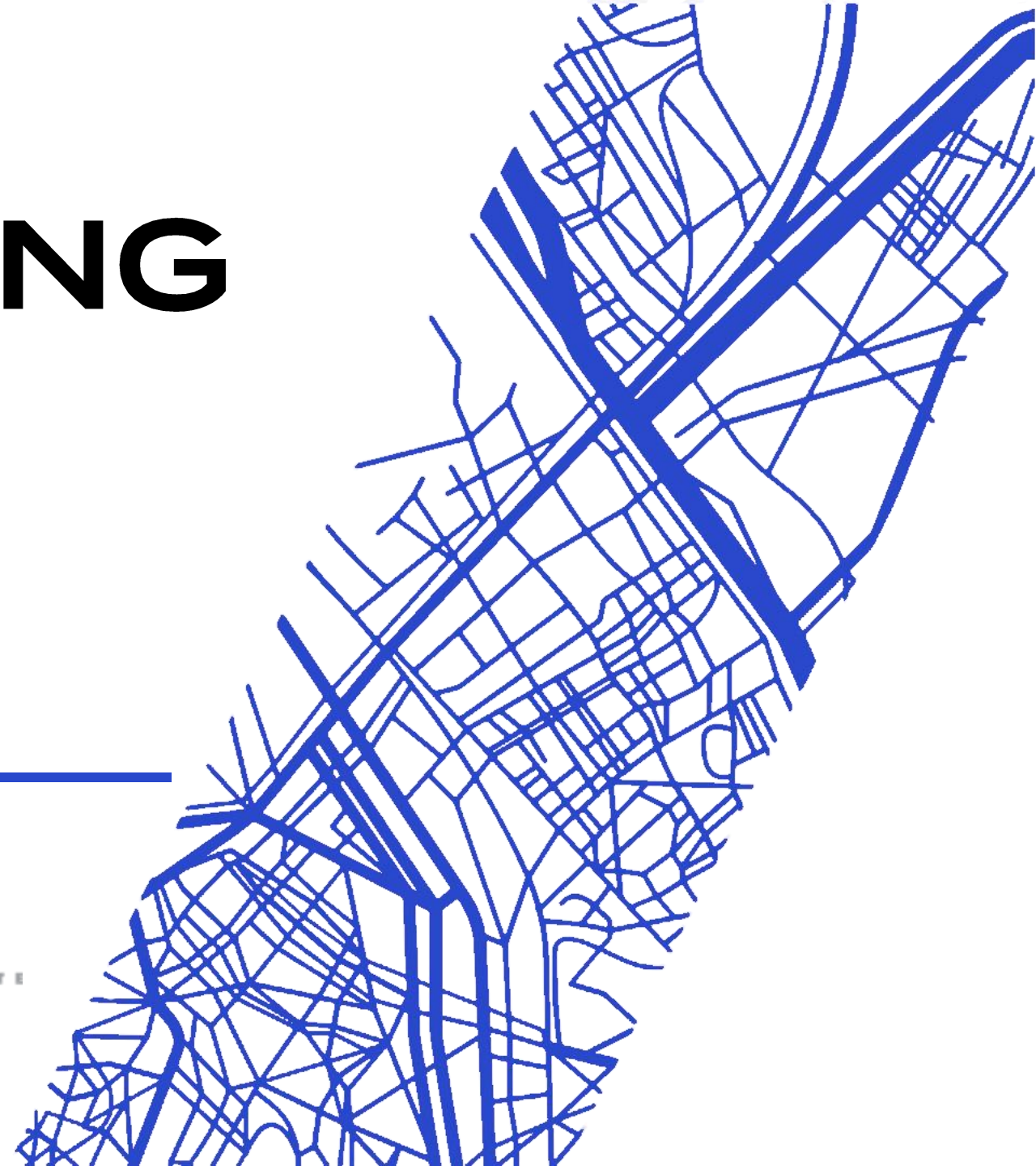


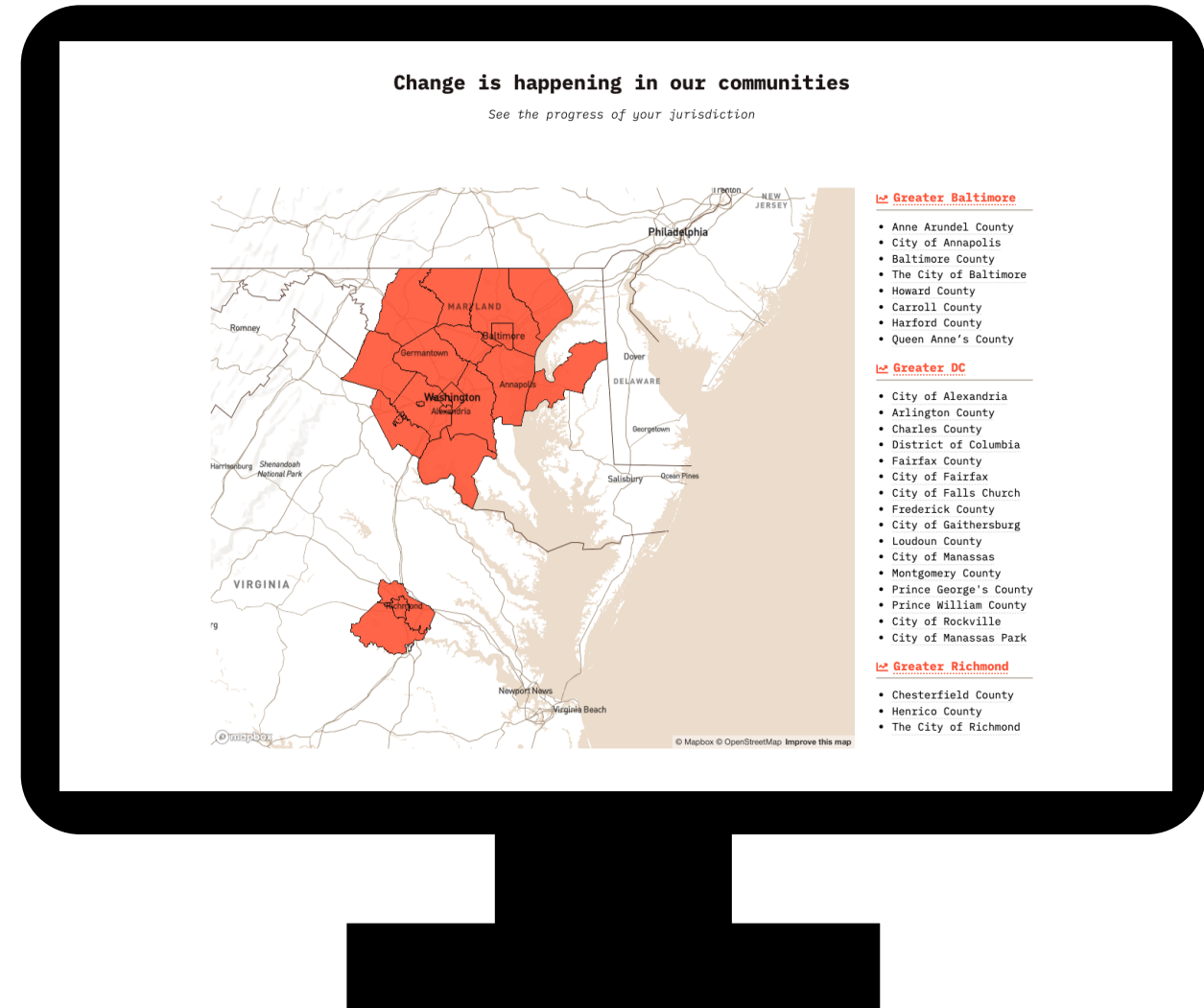
# THE HOUSING INDICATOR TOOL 5.0

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# THE HOUSING INDICATOR TOOL

- **Accountability Tool:**  
*tracks region's progress toward housing production and preservation goals*
- **Housing Policy Toolkit:**  
*outlines the policies being deployed in each jurisdiction*
- **Calls to Action:**  
*encourages every sector to get involved*
- **Equity Focused:**  
*links racial equity and housing*



# WHERE IT BEGAN

RESEARCH REPORT

## Meeting the Washington Region's Future Housing Needs

**A Framework for Regional Deliberations**



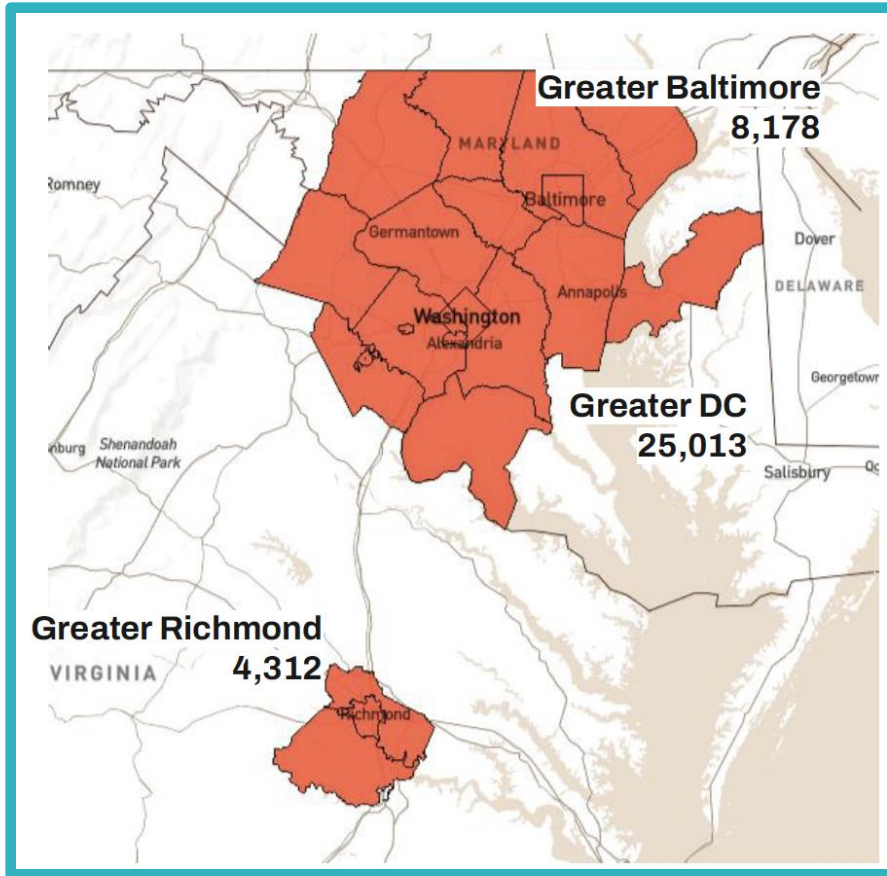
Metropolitan Washington  
Council of Governments

Needed between 2015 and 2030 in Metropolitan Washington:

**374,000**  
net new housing units

**77%**  
affordable

# WHERE WE ARE NOW



Net new housing units  
needed annually

- **Expanded Reach:**
  - *Greater DC*
  - *Greater Baltimore*
  - *Greater Richmond*
- **Granular Goals:**
  - *Annual*
  - *Regional*
  - *Jurisdictional*

# LEVERAGING THE HIT

## Understand

- *How is my jurisdiction doing on housing production and preservation?*

## Advocate

- *Which policies is my jurisdiction missing?*

## Educate

- *How has race shaped our region's housing policies?*

Preserve

Produce

Protect

### Inclusionary Housing

City of Alexandria

Arlington County

Charles County

District of Columbia

Fairfax County

City of Fairfax

City of Falls Church

Frederick County

City of Gaithersburg

Loudoun County

Montgomery County

Prince William County

City of Rockville

### Housing Trust Fund

City of Alexandria

Arlington County

District of Columbia

Fairfax County

Loudoun County

Montgomery County

Prince George's County

### Tax or Fee Exemptions

City of Alexandria

Arlington County

Charles County

District of Columbia

City of Falls Church

Frederick County

City of Gaithersburg

Loudoun County

City of Manassas

Montgomery County

Prince George's County

City of Rockville



# COMPONENTS OF THE HIT

## Landing Page





The screenshot shows the landing page of the HAND Housing Indicator Tool. At the top, there is a navigation bar with the logo, a "SELECT A JURISDICTION" dropdown, and links for "About HAND", "Resources", and "Calls to Action", along with social media icons. The main heading reads "How Do We Remove The Barriers To Accessing Quality, Safe, Affordable Housing In Our Region?". Below this, a paragraph explains the tool's purpose. Three buttons for "Greater Baltimore Dashboard", "Greater DC Dashboard", and "Greater Richmond Dashboard" are displayed. A link at the bottom invites users to "Discover the complex history of US housing and learn what we can do about it". A large, stylized red line-art map of the Washington D.C. area is on the right.

**HAND Housing Indicator Tool** SELECT A JURISDICTION About HAND Resources Calls to Action f t in

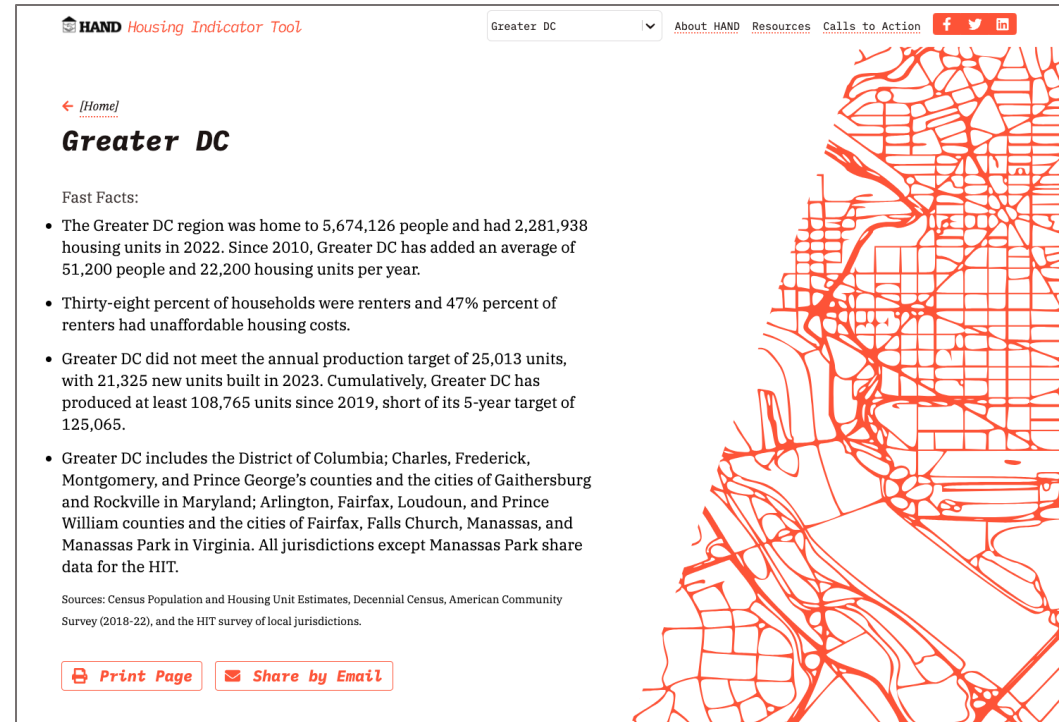
How Do We Remove The Barriers To Accessing  
**Quality, Safe, Affordable  
Housing In Our Region?**

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.

 [Greater Baltimore Dashboard](#)  [Greater DC Dashboard](#)  [Greater Richmond Dashboard](#)

[Discover the complex history of US housing and learn what we can do about it](#) ▼

## Regional Dashboards



The screenshot shows the "Greater DC" dashboard. The navigation bar includes a dropdown set to "Greater DC" and the same links and social media icons as the landing page. A "[Home]" link is at the top left. The title "Greater DC" is prominent. Under "Fast Facts:", there are four bullet points detailing population, housing production, and regional composition. At the bottom, there are "Print Page" and "Share by Email" buttons. The same stylized red line-art map of the Washington D.C. area is on the right.

**HAND Housing Indicator Tool** Greater DC ▼ About HAND Resources Calls to Action f t in



[← \[Home\]](#)

### 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 21,325 new units built in 2023. Cumulatively, Greater DC has produced at least 108,765 units since 2019, short of its 5-year target of 125,065.
- 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.

 [Print Page](#)  [Share by Email](#)

# COMPONENTS OF THE HIT

## Arlington County

### Fast Facts:

- Arlington County was home to 234,162 people and had 123,963 housing units in 2023. Since 2010, Arlington has added an average of 2,000 people and 1,400 housing units per year.
- Fifty-eight percent of households were renters and 40 percent of renters had unaffordable housing costs.
- Arlington exceeded the annual production target of 1,393 units, with 2,629 new units built in 2024. Cumulatively, Arlington has produced at least 12,525 units since 2019, exceeding its 6-year target of 8,358.
- Arlington has not adopted the 2030 COG housing targets but has established a local goal for 17.7% of rental housing stock to be affordable at 60% of AMI or less and 28.4% of new ownership stock to be affordable between 80-120% of AMI by 2040.

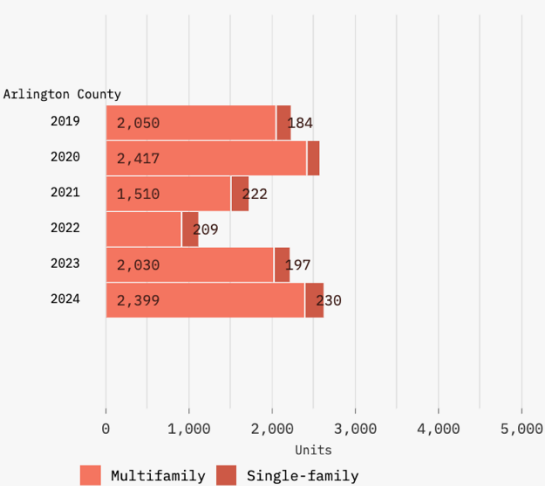
Sources: Census Population and Housing Unit Estimates, Decennial Census, American Community Survey (2019-23), and the HIT survey of local jurisdictions.

 [Print Page](#)

 [Share by Email](#)

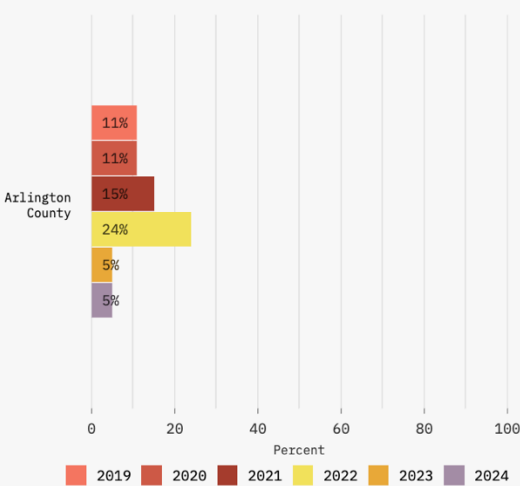
### Amount of Housing

Number of units built by type



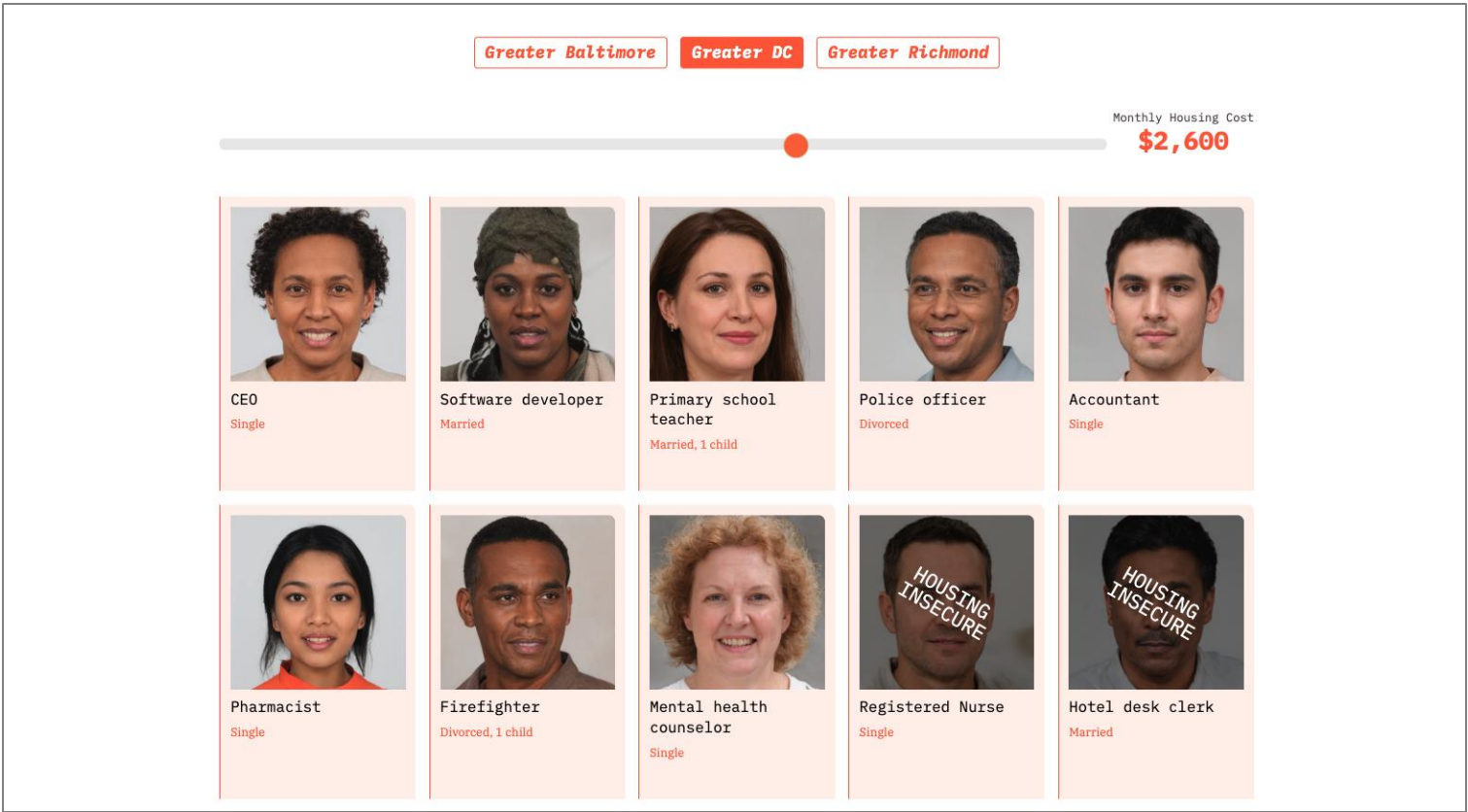
### Affordability of Housing

Share of units affordable to households with low incomes



## Jurisdictional Dashboards

# COMPONENTS OF THE HIT




Who Can Afford to Live in the Region?





# COMPONENTS OF THE HIT

## Policy Toolkit

- *Preserve*
- *Produce*
- *Protect*

 **Preserve**

 **Produce**

 **Protect**

► **Inclusionary housing**

► **Housing Trust Fund with consistent, dedicated local revenue source**

► **Property tax, impact fee, tax or fee abatements or exemptions for rental projects with affordable units**

► **Prioritize making publicly-owned land available for affordable housing**

▼ **Zoning promotes housing variety**

Residential zoning that allows for a wide range of housing types ensures people of various ages, incomes, and cultural preferences can live in a jurisdiction. Promoting variety means jurisdictions have zoning that allows for duplexes, quadplexes, middle-density multiplexes, and larger multifamily developments on at least 25 percent of residential land. This flexibility enables developers to produce more housing with the same fixed costs, increasing the affordability and variety of new units.

► **Facilitates multifamily development**

## Policy Status

Solving the region's affordable housing crisis requires a portfolio of policies to preserve existing affordable housing, produce more housing, and protect people from discrimination and displacement.



Toggle policy descriptions


**Preserve**


**Produce**



**Protect**



### Inclusionary Housing



Inclusionary housing policies require private developers to provide affordable units in new developments or in exchange for additional density.

-  **City of Alexandria**

 **Arlington County**


 **Montgomery County**
-  **Prince George's County**


 **The City of Richmond**
-  **District of Columbia**



 **The City of Baltimore**
-  **Baltimore County**



### Housing Trust Fund



A Housing Trust Fund with a consistent, dedicated local revenue source ensures a flexible, reliable revenue stream.

-  **City of Alexandria**

 **Arlington County**

 **Montgomery County**
-  **Prince George's County**

 **The City of Richmond**
-  **District of Columbia**

 **The City of Baltimore**
-  **Baltimore County**

# COMPONENTS OF THE HIT

## Calls to Action for ALL Sectors:

- *Public Sector*
- *Private Sector*
- *Nonprofit Organizations & Institutions*
- *Real Estate Developers*
- *Philanthropy*
- *Community Members & Organizers*
- *Law Firms & Lawyers*
- *Lenders & Financiers*

### Public Sector

1. Create a local housing trust fund to provide flexible funding, and ensure that it has a dedicated funding source:

Localities across the country use housing trust funds to provide desperately needed flexible financing for affordable housing development. Many jurisdictions in the HIT have a trust fund, but not all have a dedicated funding source. Trust funds should be tied to a reliable funding source (like the baseline of the local budget) so that they're revolving and not vulnerable to shifts in political priorities. What changes can you make in your jurisdiction?

2. Amend zoning regulations to provide for more housing density in traditionally lower-density neighborhoods and near transit:

Pushing for zoning changes is a high impact way to support increasing the housing supply in your jurisdiction and is a racial equity issue. Consider your jurisdiction's progress on the three zoning-related policies on the HIT and push to allow for more density, especially in high-resource neighborhoods and near transit.

3. Leverage public land for affordable housing development

Land cost can be a significant part of development costs, particularly in high-cost areas of our region. Seek out opportunities to leverage public land in your jurisdiction to be used for affordable housing development.

# EVOLUTION OF THE HIT

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## HIT 1.0

- DC Metro Region
- Policy status for each jurisdiction
- Housing outcomes by income range

## HIT 2.0

- New questions on production & preservation trends
- Increased racial equity focus
- Additional policy clarity

## HIT 3.0

- Enviro justice indicators
- Deeper dive on home-ownership
- Introducing Baltimore jurisdictions

## HIT 4.0

- Regional dashboards
- Potential homebuyers by race
- Introducing Richmond jurisdictions

# NEW TO HIT 5.0

## New Zoning Policies

## Additional Richmond Data

### ▼ Maximize transit-oriented development

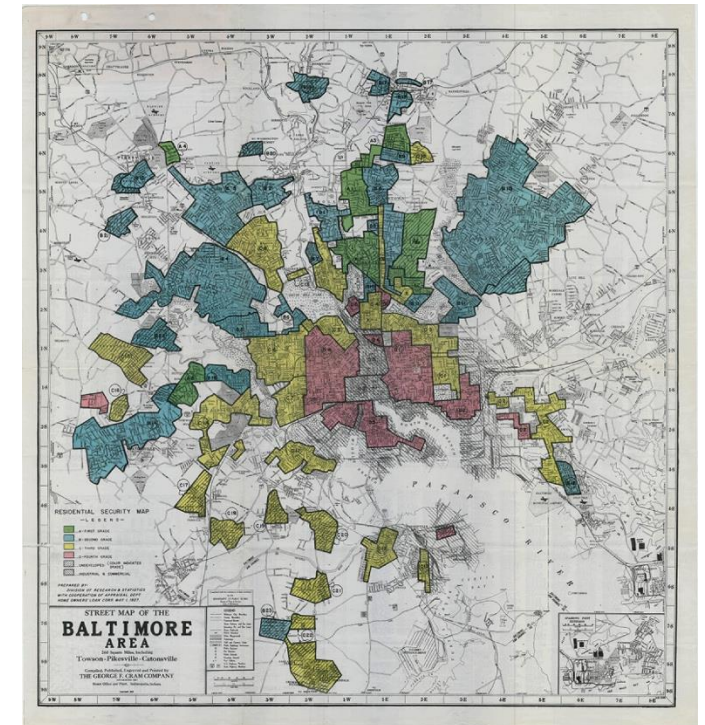
Dense residential development around transit stations increases the number of residents who can access jobs and amenities (e.g., groceries, restaurants, and childcare) without increasing traffic congestion as much as development in other areas. Clustering housing around transit also reduces development expenses while improving transit investment ridership and returns. Jurisdictions that allow multifamily developments on more than half of residential land near high-capacity transit are maximizing transit-oriented development.

### ▼ Zoning promotes housing variety

Residential zoning that allows for a wide range of housing types ensures people of various ages, incomes, and cultural preferences can live in a jurisdiction. Promoting variety means jurisdictions have zoning that allows for duplexes, quadplexes, middle-density multiplexes, and larger multifamily developments on at least 25 percent of residential land. This flexibility enables developers to produce more housing with the same fixed costs, increasing the affordability and variety of new units.

### ▼ Facilitates multifamily development

Special exception and discretionary review processes—which may require developers to undertake additional negotiations, professional certifications, and public hearings outside of what is written in the zoning code—increase review time, costs, and risk in housing development. Clear, by-right zoning standards that enable a multifamily development to pass through standard administrative review in a timely manner makes for more affordable housing. Jurisdictions are doing more to facilitate multifamily development when at least half of projects proceed by-right.



**HIT 5.0**





June 5, 2025

# 2024 Results from the HIT Survey

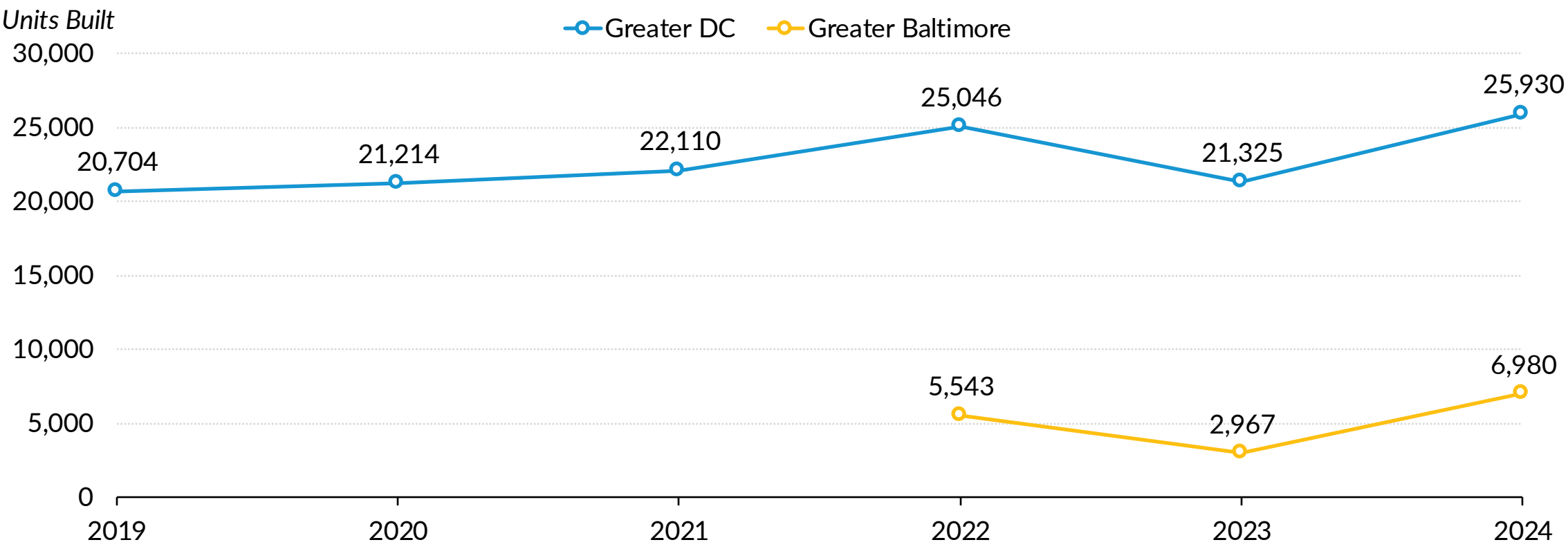
HIT 5.0 Launch



Leah Hendey

# Overall housing production increased from 2023-2024

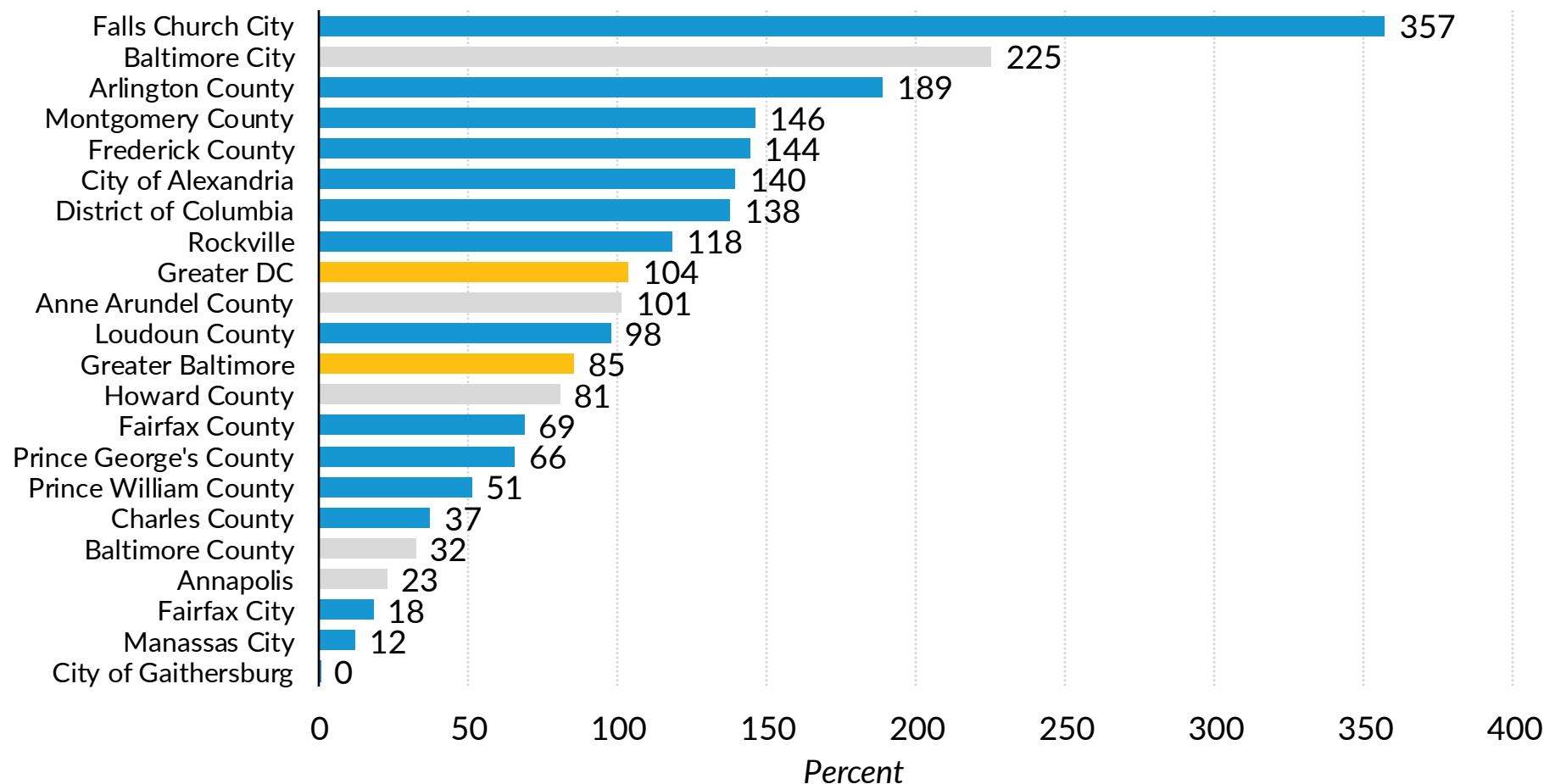
Total New Housing Units Produced, 2019-2024



Note: City of Baltimore did not report total units in 2023.  
Source: HIT Survey of Local Jurisdictions

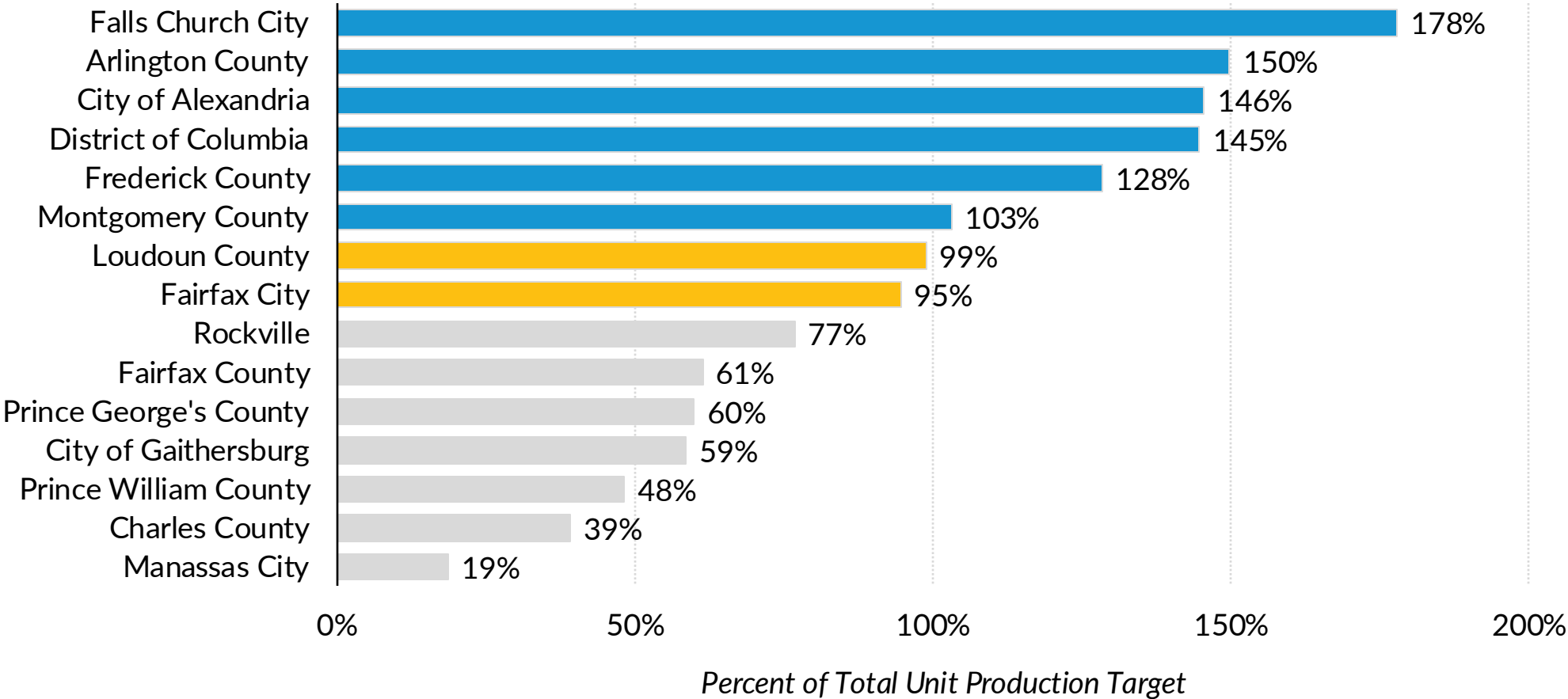
# 10 jurisdictions produced at least 85% of annual unit goal

New Units as a Percent of Estimated Annual Unit Goal by Jurisdiction, 2024



# 6 jurisdictions exceeded 6-yr production targets, with 2 very close

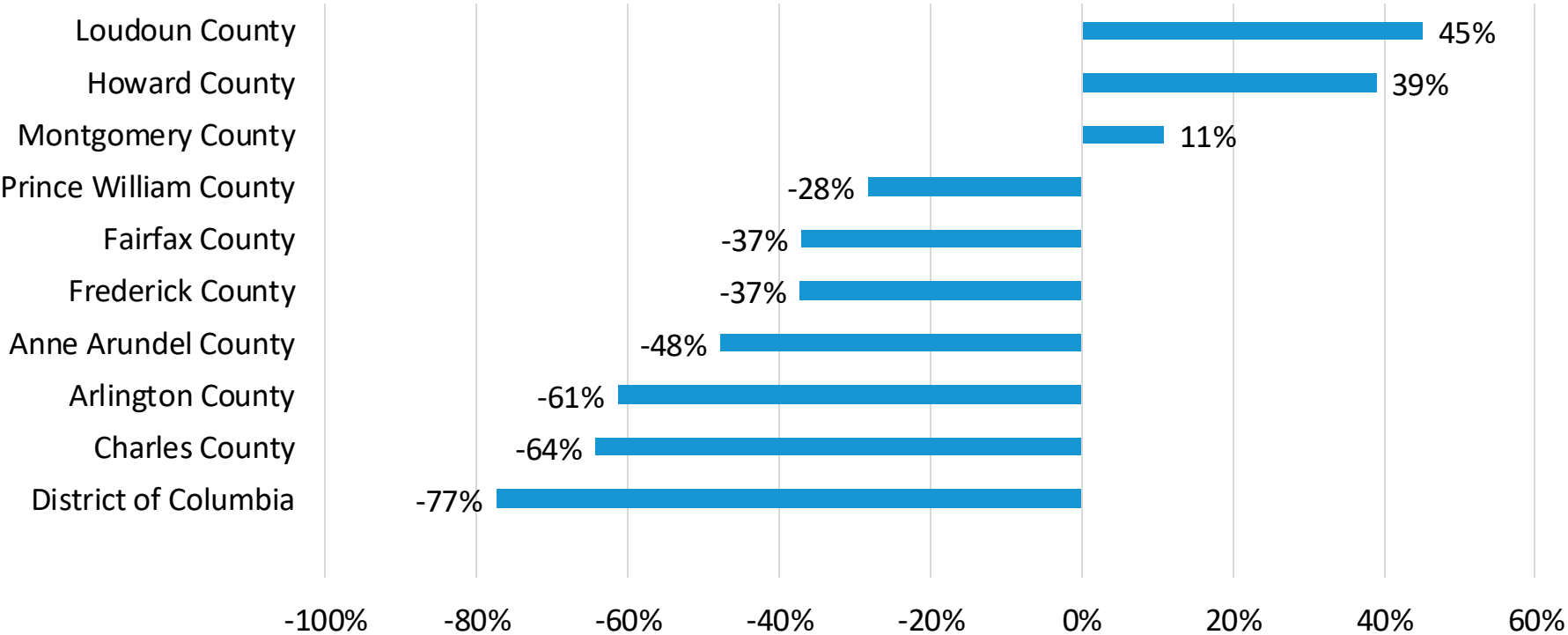
Total Housing Units Produced as a Percent of Target, Greater DC Area, 2019-24



Note: Targets are calculated for the number of years jurisdictions participated in the HIT.  
Source: HIT Survey of Local Jurisdictions

# Most jurisdictions have fewer housing units in the pipeline

Percent Change in Number of Housing Units Permitted for New Construction, 2022 to 2024

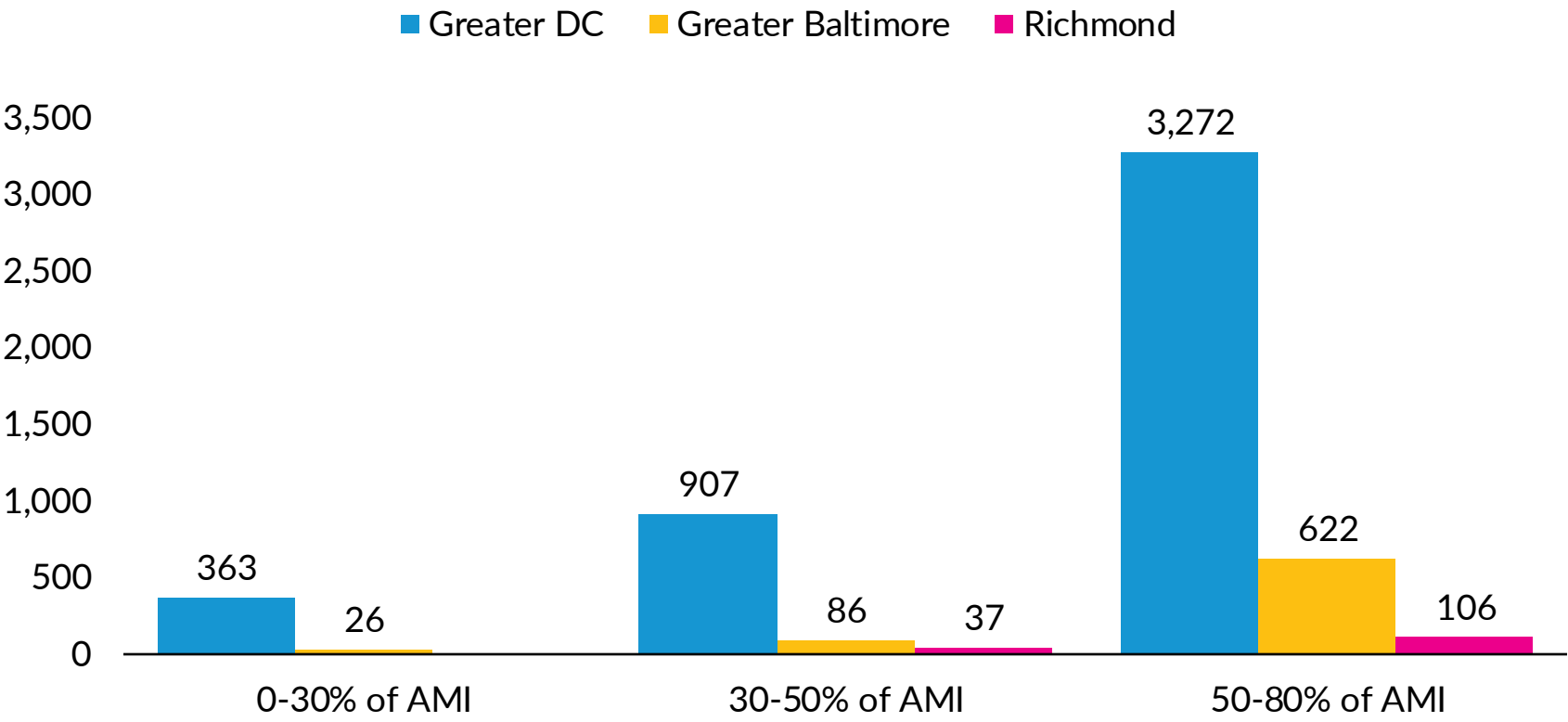


Note: Only includes jurisdictions reporting in both years.  
Excludes the smaller cities that participate in the HIT.  
Source: HIT Survey of Local Jurisdictions



# More than 5,400 affordable units added across the Capital region

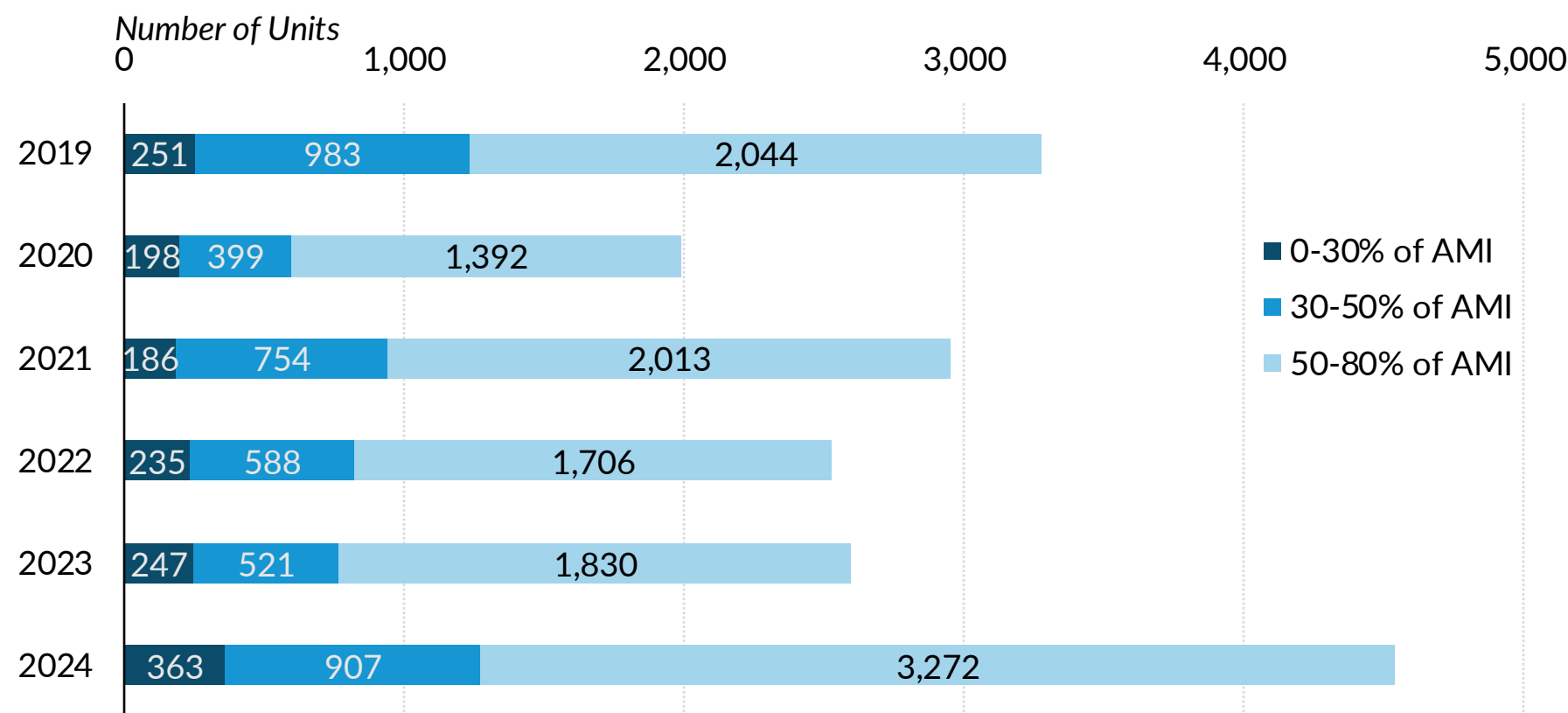
Number of New Committed Affordable Units Built by Affordability Level, 2024



Note: 181 units in the Greater DC area and 19 units in the Greater Baltimore area were set aside for permanent supportive housing.  
Source: HIT Survey of Local Jurisdictions

# Greater DC produced 18,064 new committed affordable units in the last 6 years

New Committed Affordable Units by Affordability Level, Greater DC Area, 2019-24

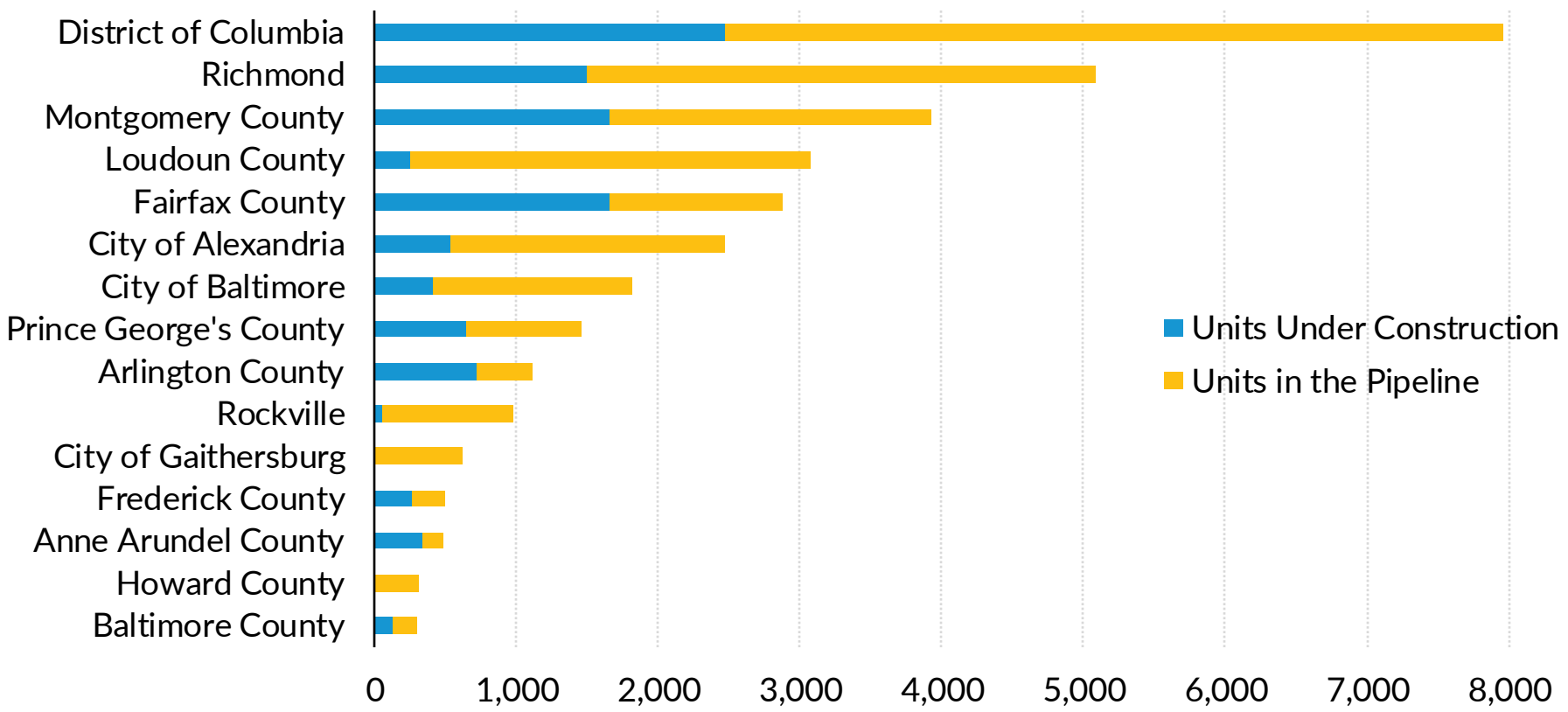


Note: 175 committed affordable units in 2019 have unknown affordability levels.

Source: HIT Survey of Local Jurisdictions

# More than 33,000 affordable units are in the pipeline or under construction

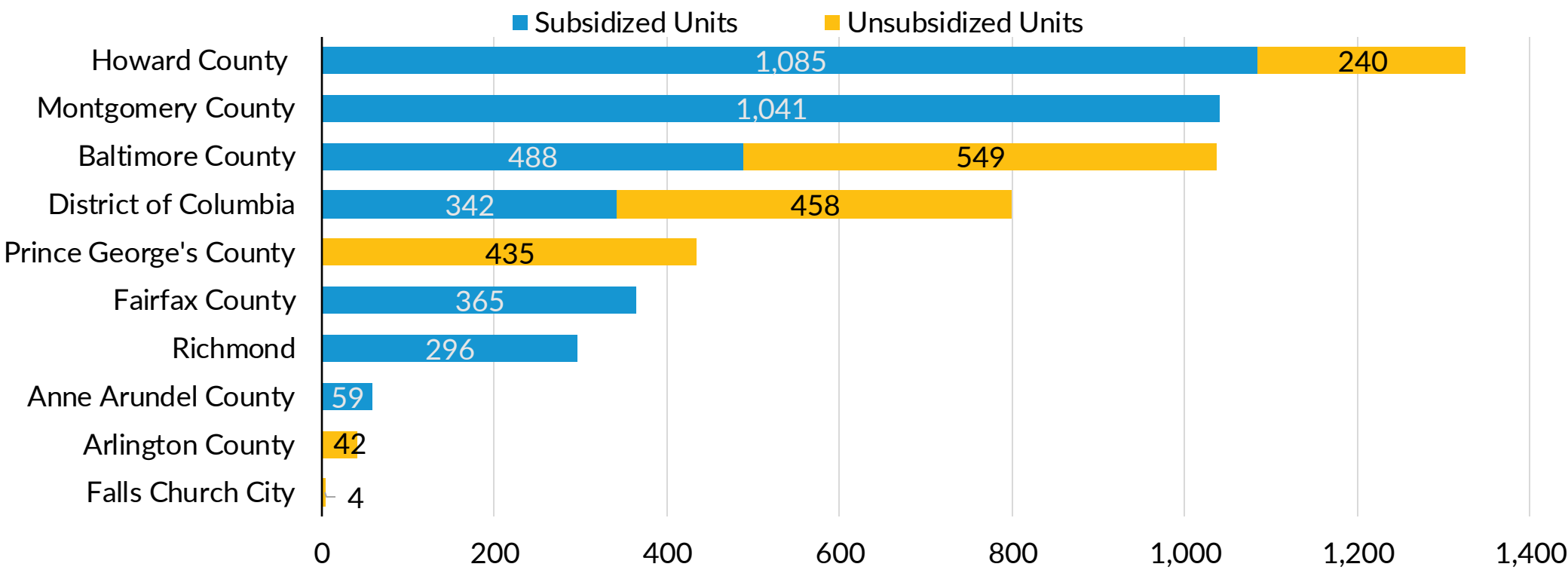
Number of Affordable Units Under Construction or in the Pipeline, 2024



Source: HIT Survey of Local Jurisdictions  
Note: Charles County, Fairfax City, and Annapolis also have a combined 201 units in the pipeline or under construction.

# More than 5,400 units were reported as preserved in 2024, with more jurisdictions reporting

Number of Affordable Units that were Preserved by Type, 2024



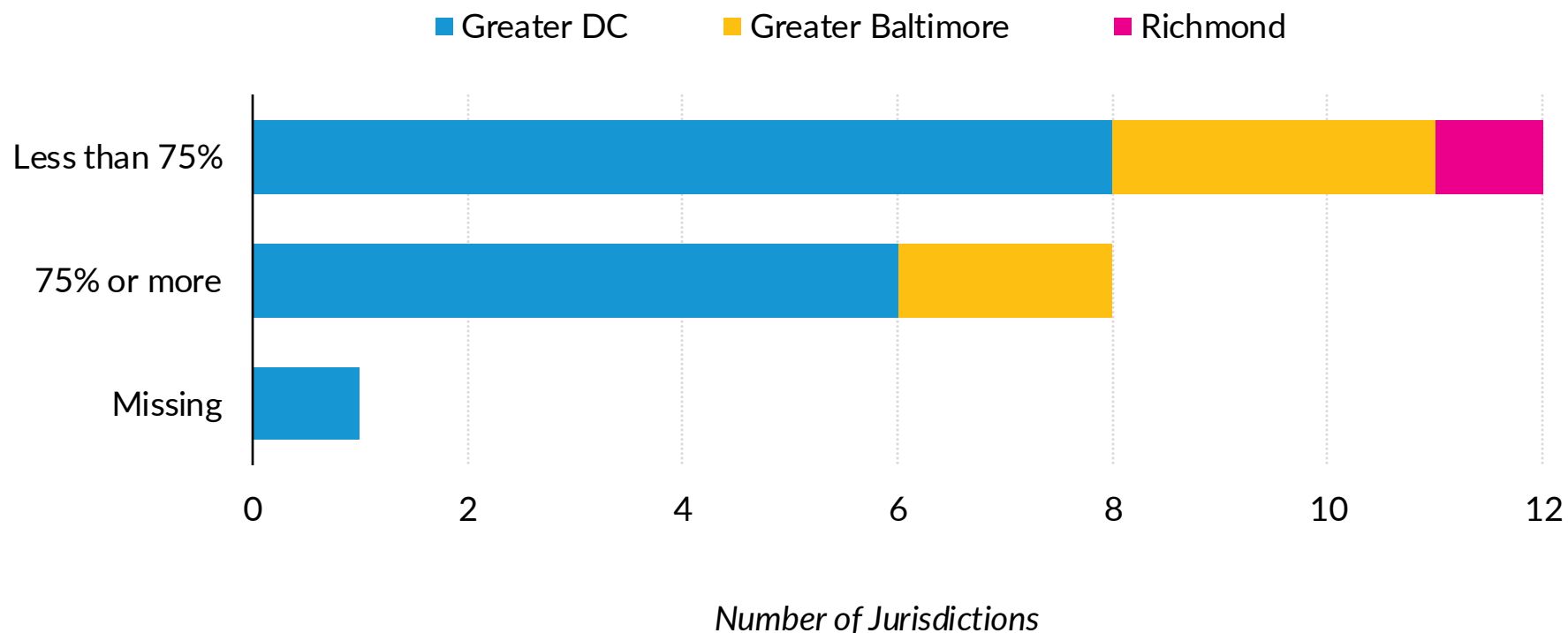
# Meeting the region's housing needs requires policies to preserve, produce, and protect

Category	Policy	All (N=21)
Preserve	Homebuyer assistance	20
Produce	Inclusionary housing	19
Protect	Locally-funded emergency rental assistance	15
Protect	Climate Action Plan	15
Preserve	Right of First Refusal	14
Produce	Prioritize Public Land	14
Protect	Outreach on Flood Insurance	13
Produce	Housing Trust Fund (Dedicated Source)	10
Protect	Locally-funded Vouchers	8



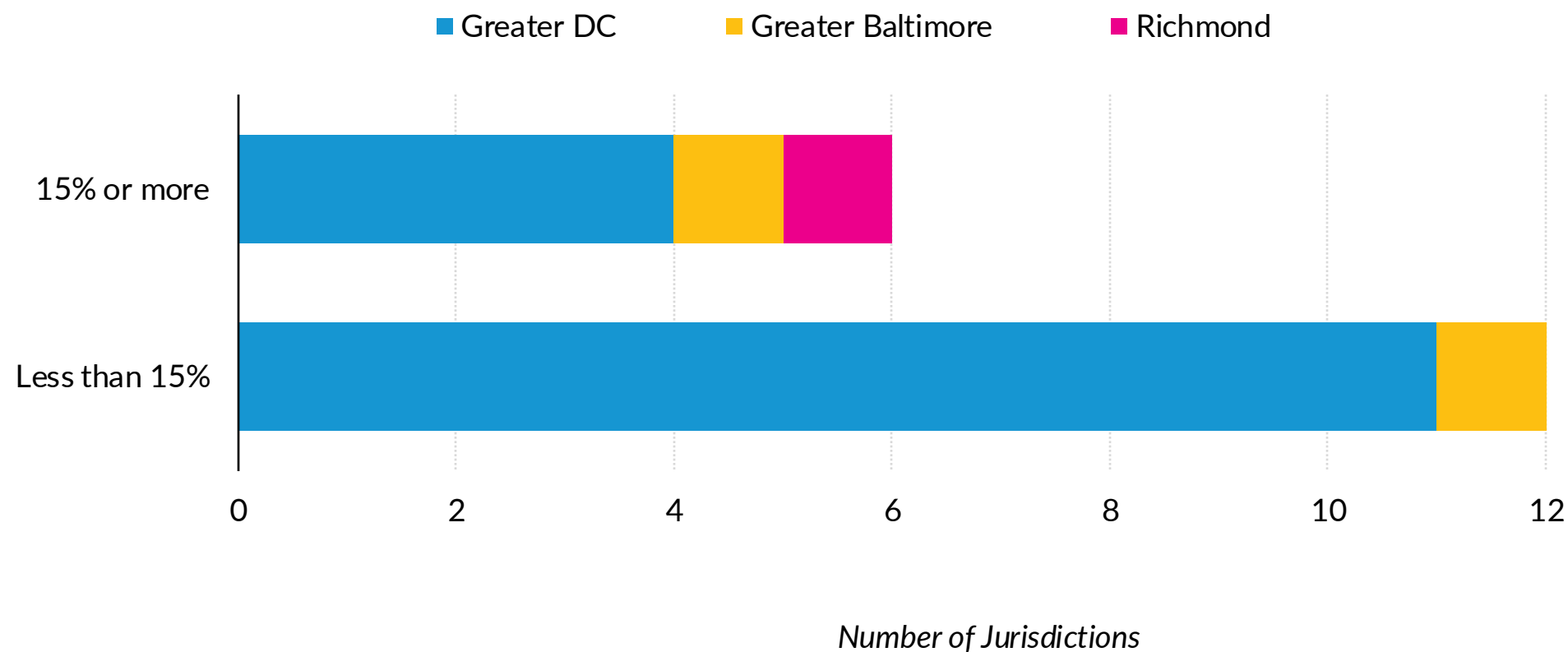
# 12 jurisdictions have zoning that allows housing variety

Share of Residential Land Zoned for Only Single-Family Housing



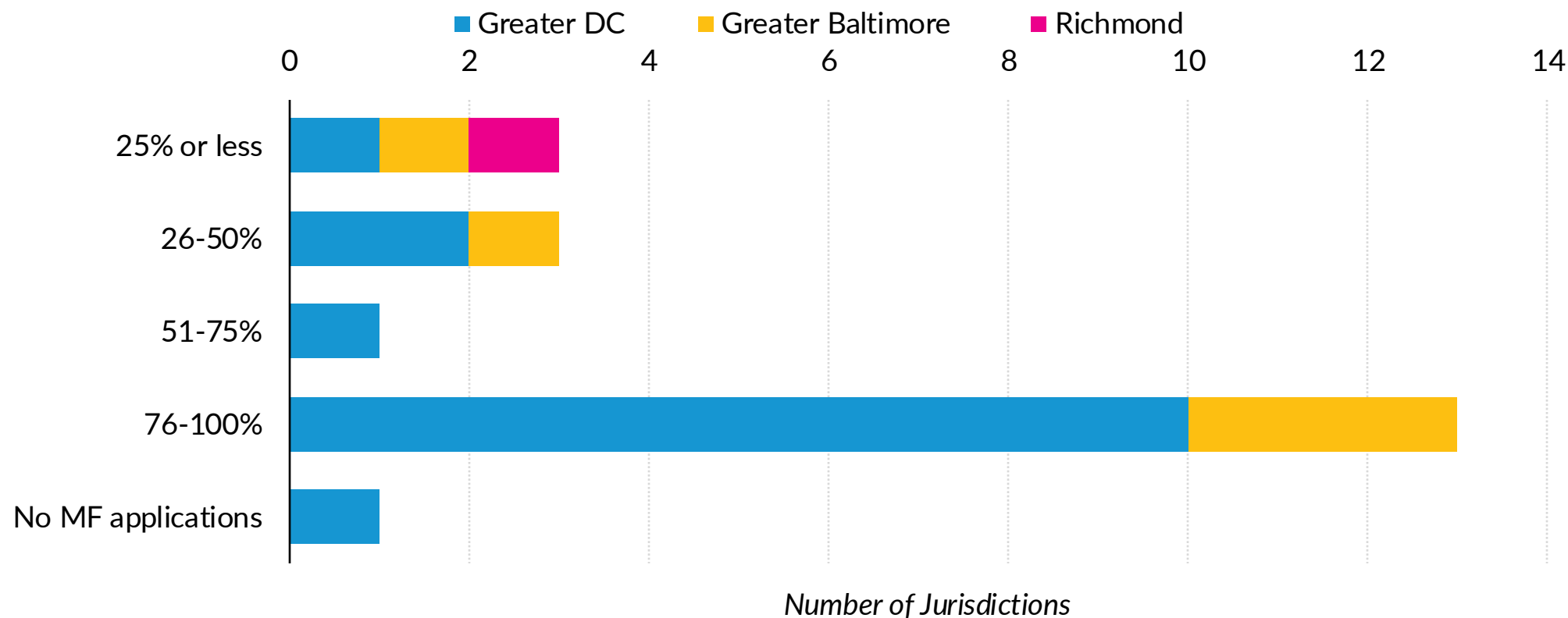
# 6 jurisdictions allow denser multifamily development in a larger area

Share of Residential Land Zoned for 10+ Units



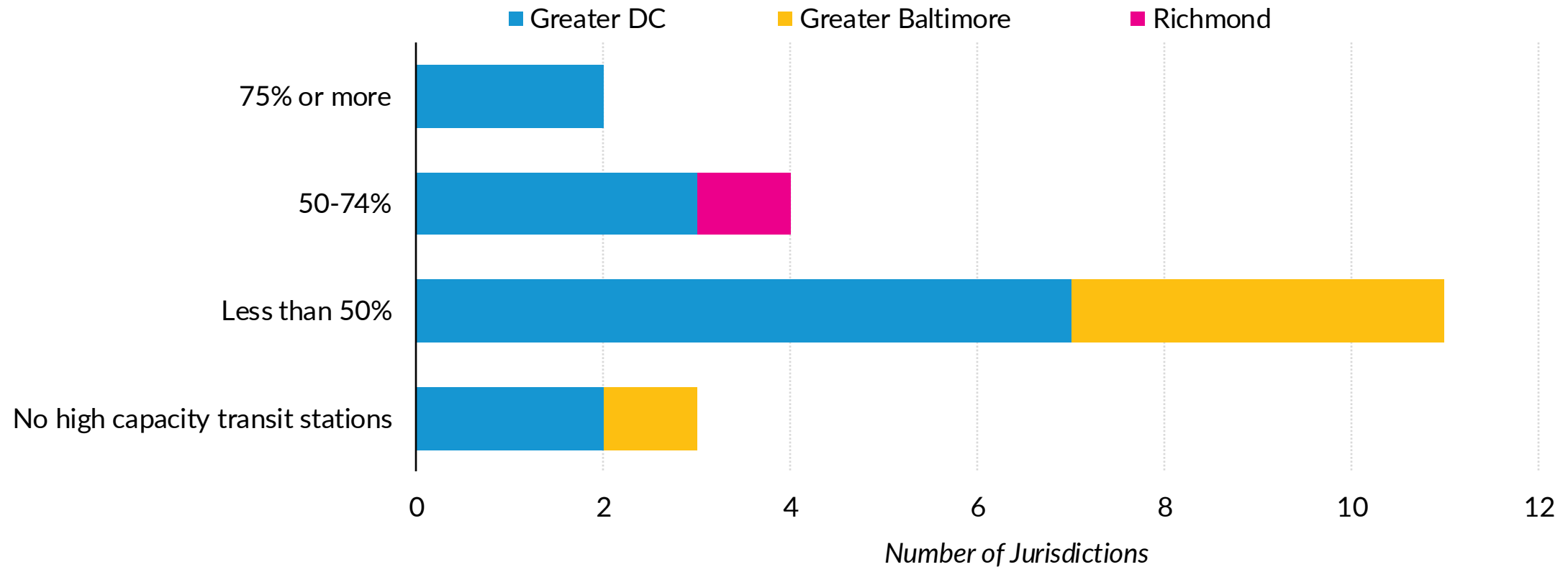
# 6 jurisdictions are doing more to facilitate multifamily development

Share of Multifamily Development Applications over the Past 3 Years that Included a Special Exception or Discretionary Review Process



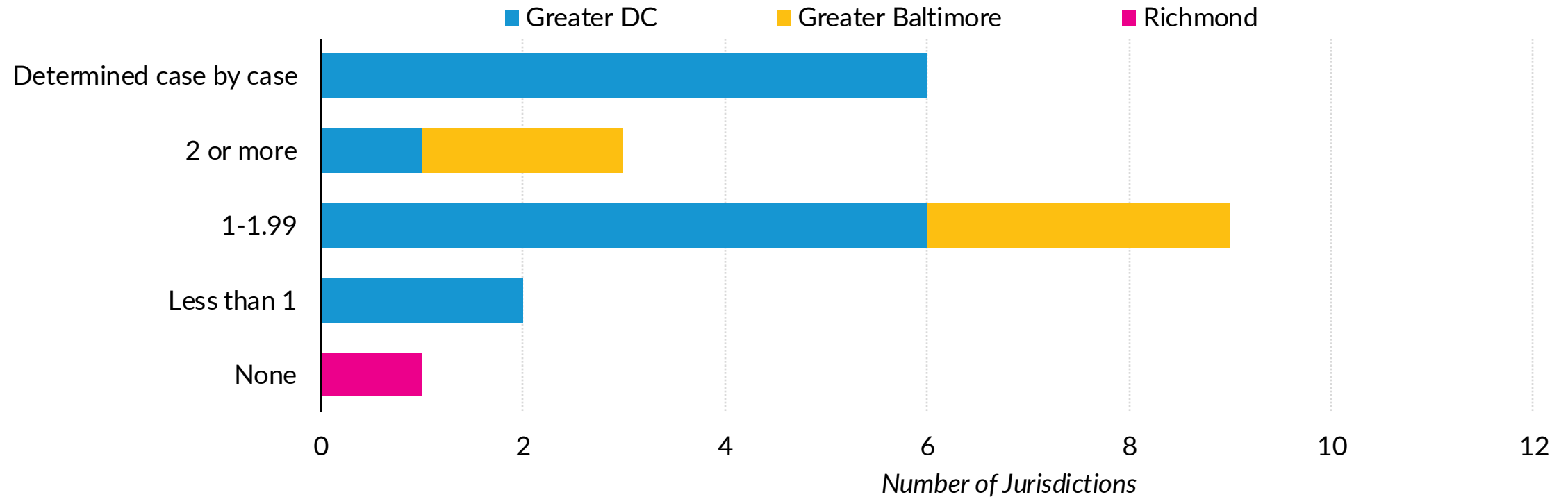
# 6 jurisdictions are maximizing transit-oriented development

Share of Land within a ½ Mile of High-Capacity Transit that Permits the Development of Multifamily Housing



# Most jurisdictions require at least 1 off-street parking spot for each multifamily unit

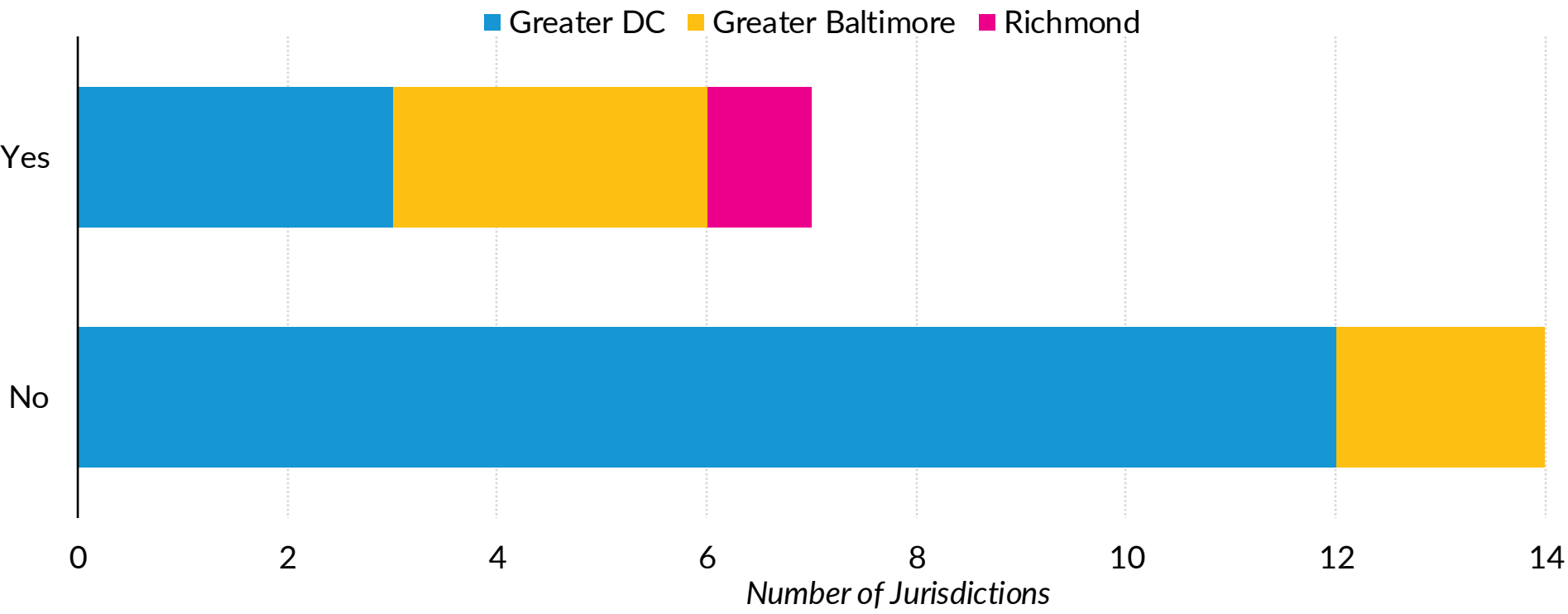
Number of Off-Street Parking Spaces Required Per Multifamily Unit





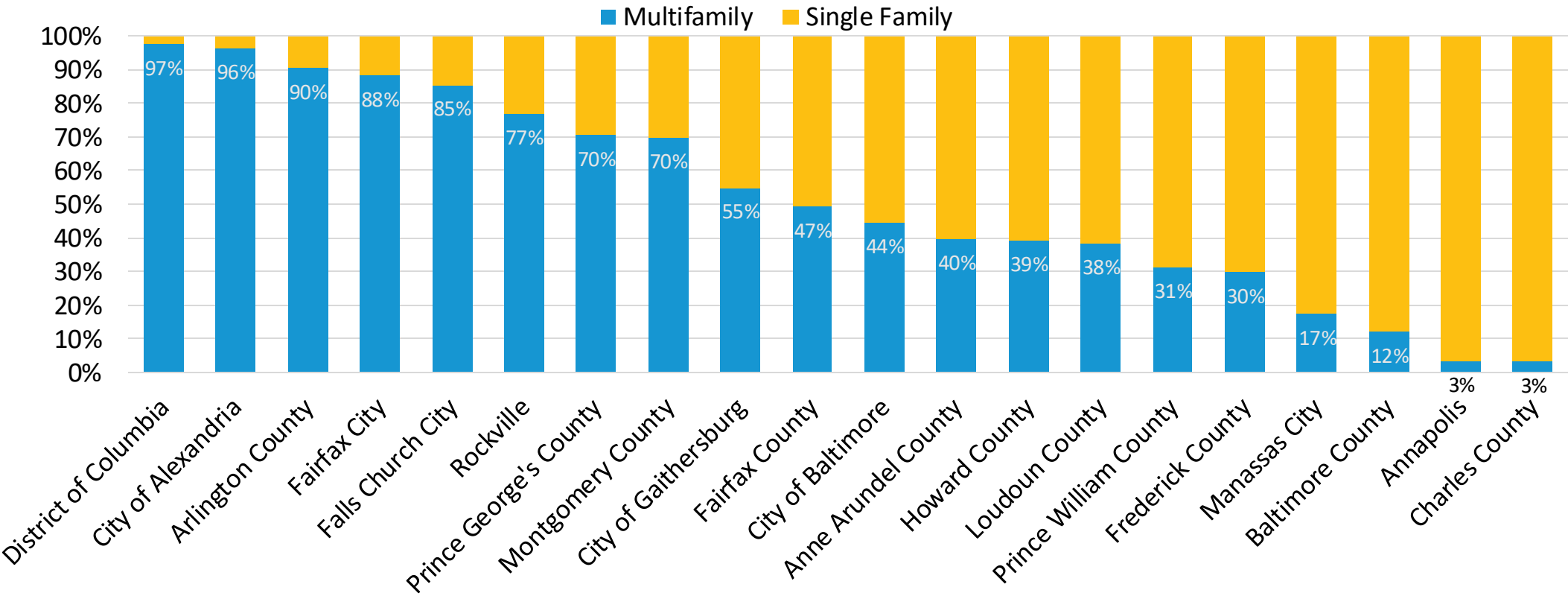
# 7 jurisdictions have predictable timelines for review

Jurisdiction Has a Written Policy with a Time Limit on Project Permit Application Review Determination



# Outcomes are important, a lot of multifamily housing still being produced

Percent of New Units by Type, All HIT Data Collection



Note: Includes all years of HIT data collection for each jurisdiction, typically 6 in the Greater DC area and 3 in the Greater Baltimore area.  
Source: HIT Survey of Local Jurisdictions

[hit.housingand.org](http://hit.housingand.org)