

# *Neighborhood Plus*

The future of living in our city

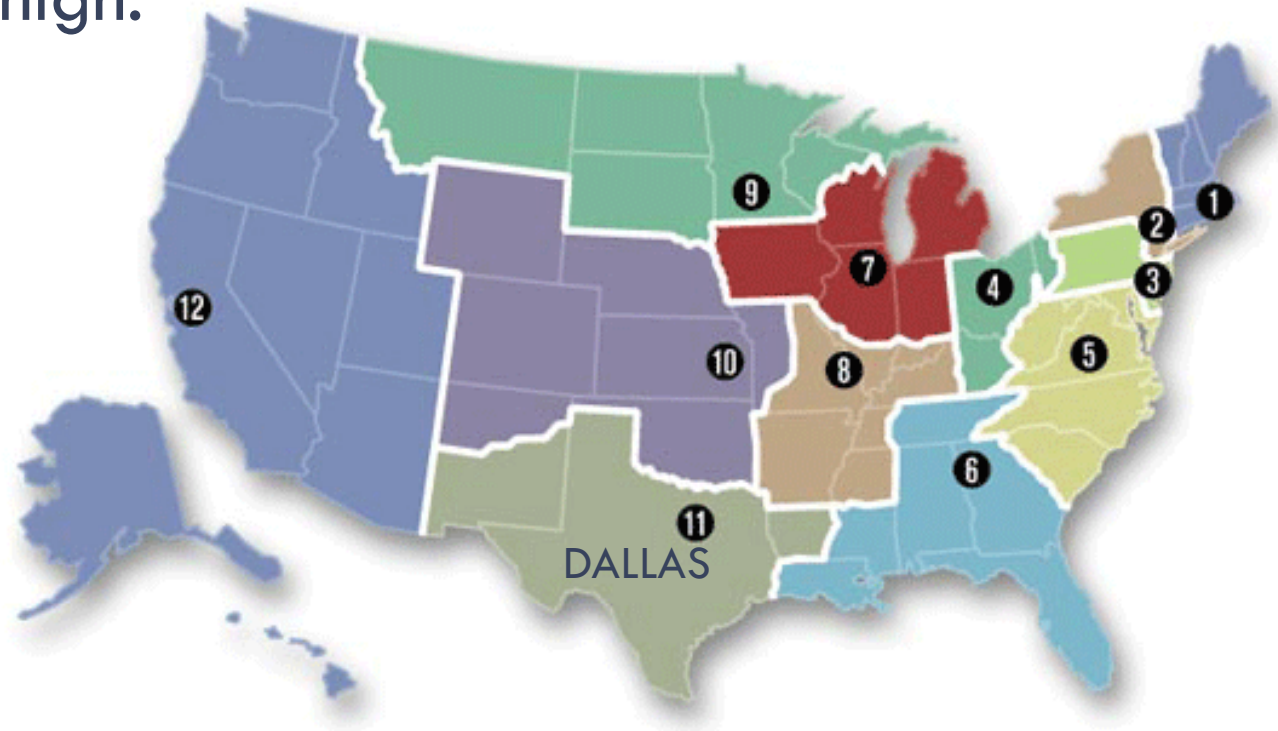
Oak Cliff Chamber of Commerce

May 14<sup>th</sup> , 2015



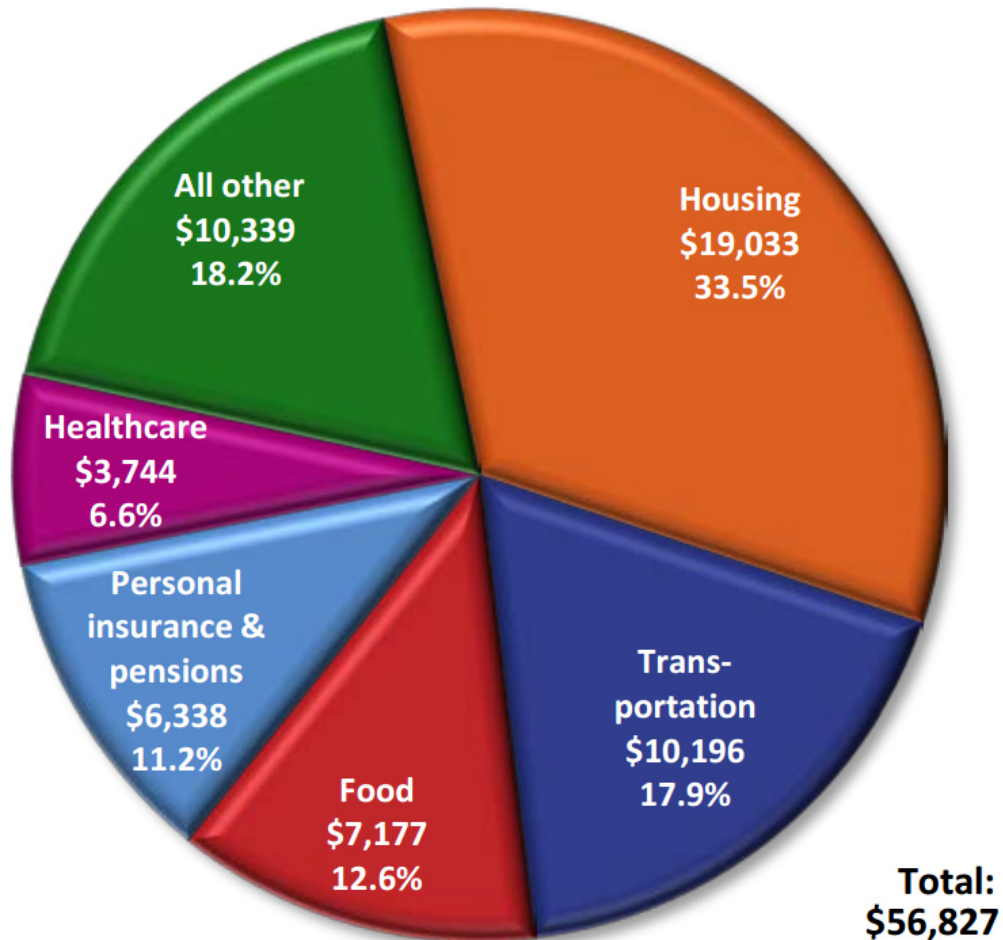
# Dallas Federal Reserve Beige Book, April 2015 – Dallas District report

- Real Estate remained solid: “Overall apartment demand stayed strong and rent growth was solid, particularly in Dallas-Fort Worth where occupancy was at a multiyear high.”



# How much do we spend on Housing?

Dallas-Fort Worth area average annual expenditures 2012-13

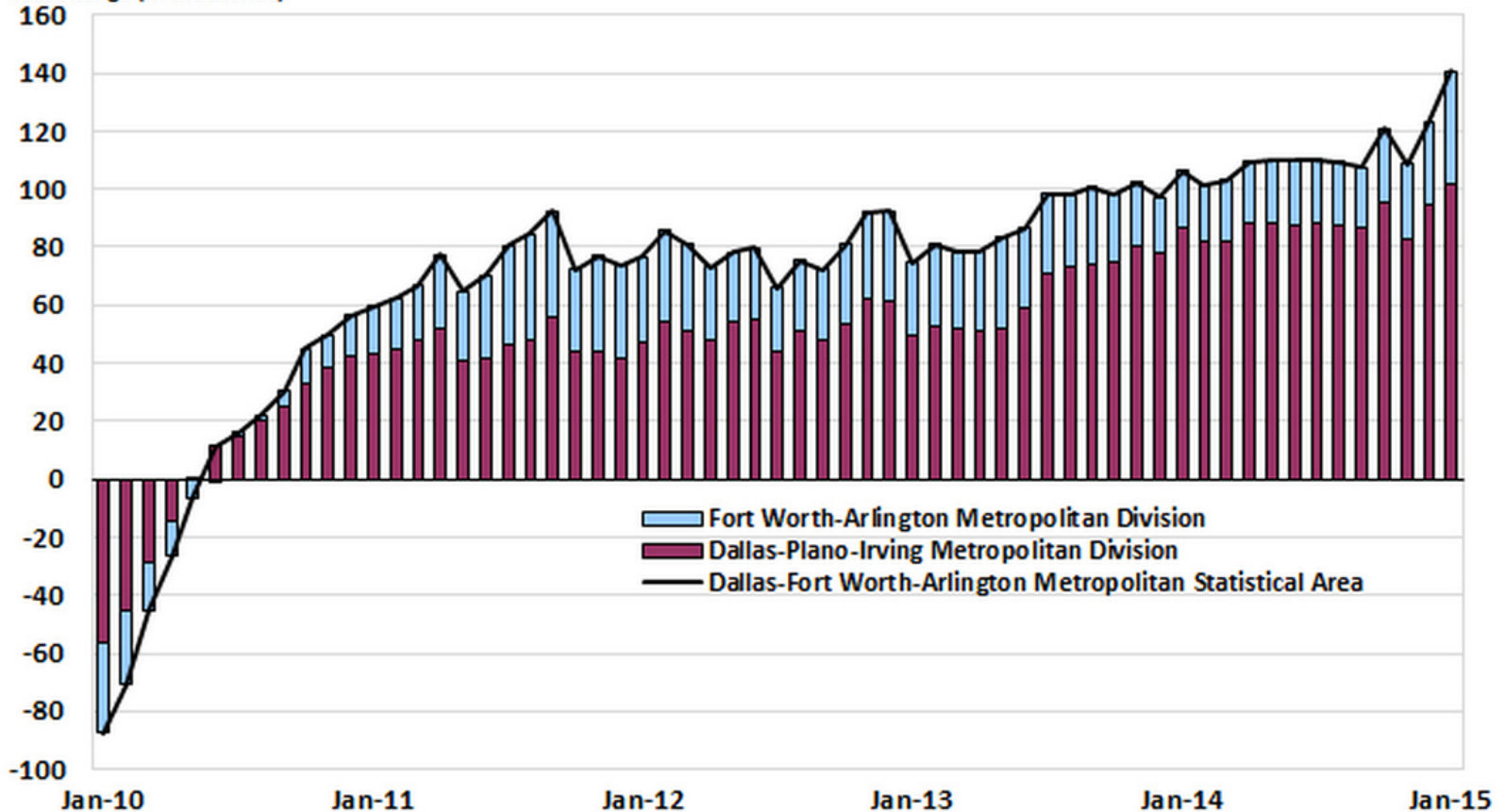


Source: U.S. BLS, Consumer Expenditure Survey.

# 2010 – 2015 DFW Employment Trends

Chart 1. Total nonfarm employment, over-the-year net change in the Dallas metropolitan area and its divisions, January 2010–January 2015

Net change (in thousands)

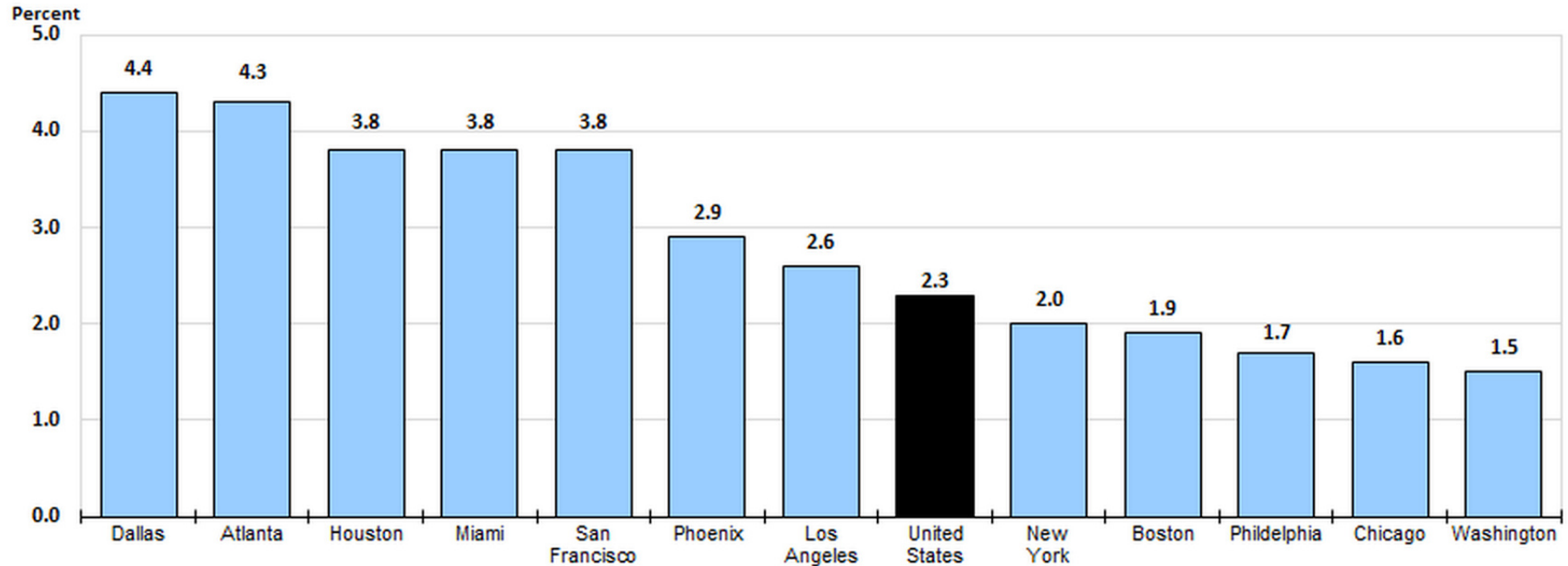


Source: U.S. Bureau of Labor Statistics.



# Employment Change in the 12 Largest Metro Areas

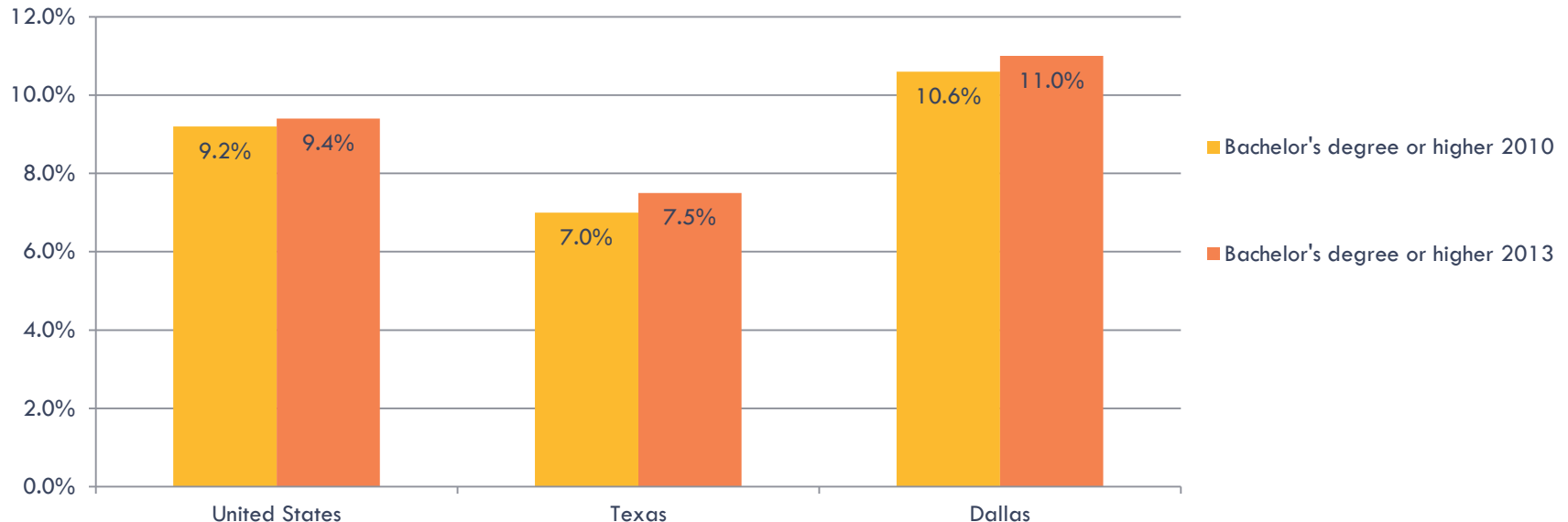
Chart 3. Total nonfarm employment, over-the-year percent change, United States and 12 largest metropolitan areas, January 2015



Source: U.S. Bureau of Labor Statistics.

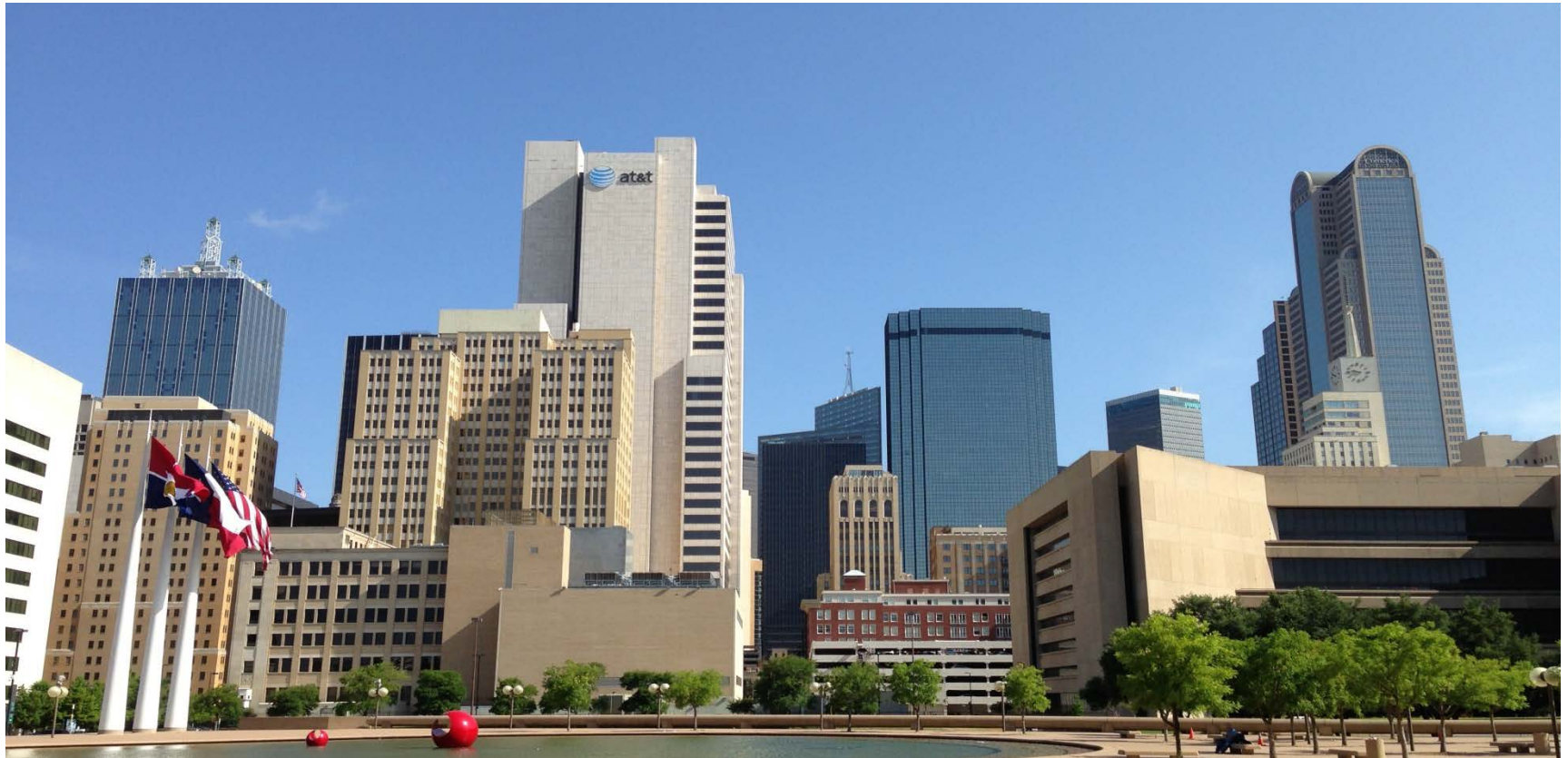
# Moving to Texas: Smart and Young

- Census data show Dallas has a greater proportion of 18 to 24 year-old with a Bachelor's degree or higher than the State or US as a whole
- This proportion grew from 2010 to 2013



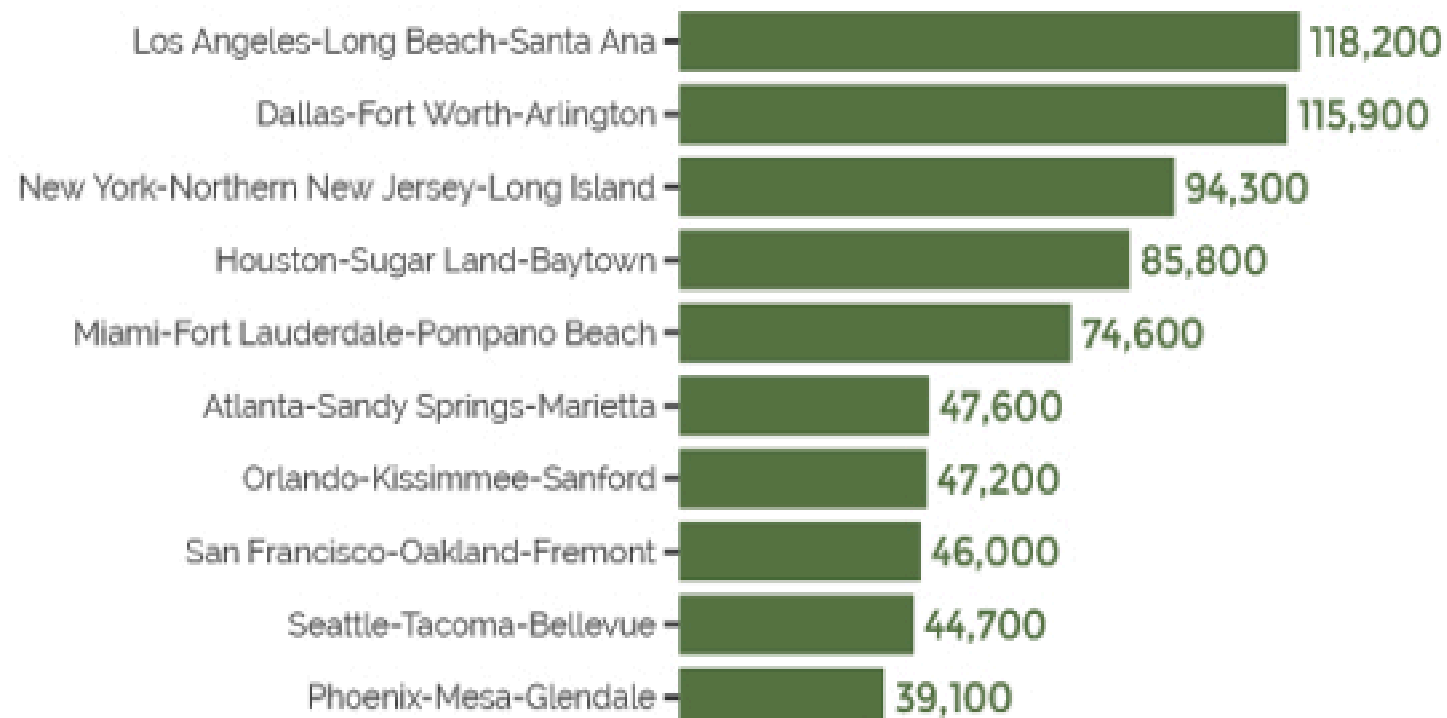
Source: 2006-2010 American Community Survey 5-Year Estimates and 2009-2013 American Community Survey 5-Year Estimates

# North Texas Real Estate 2014



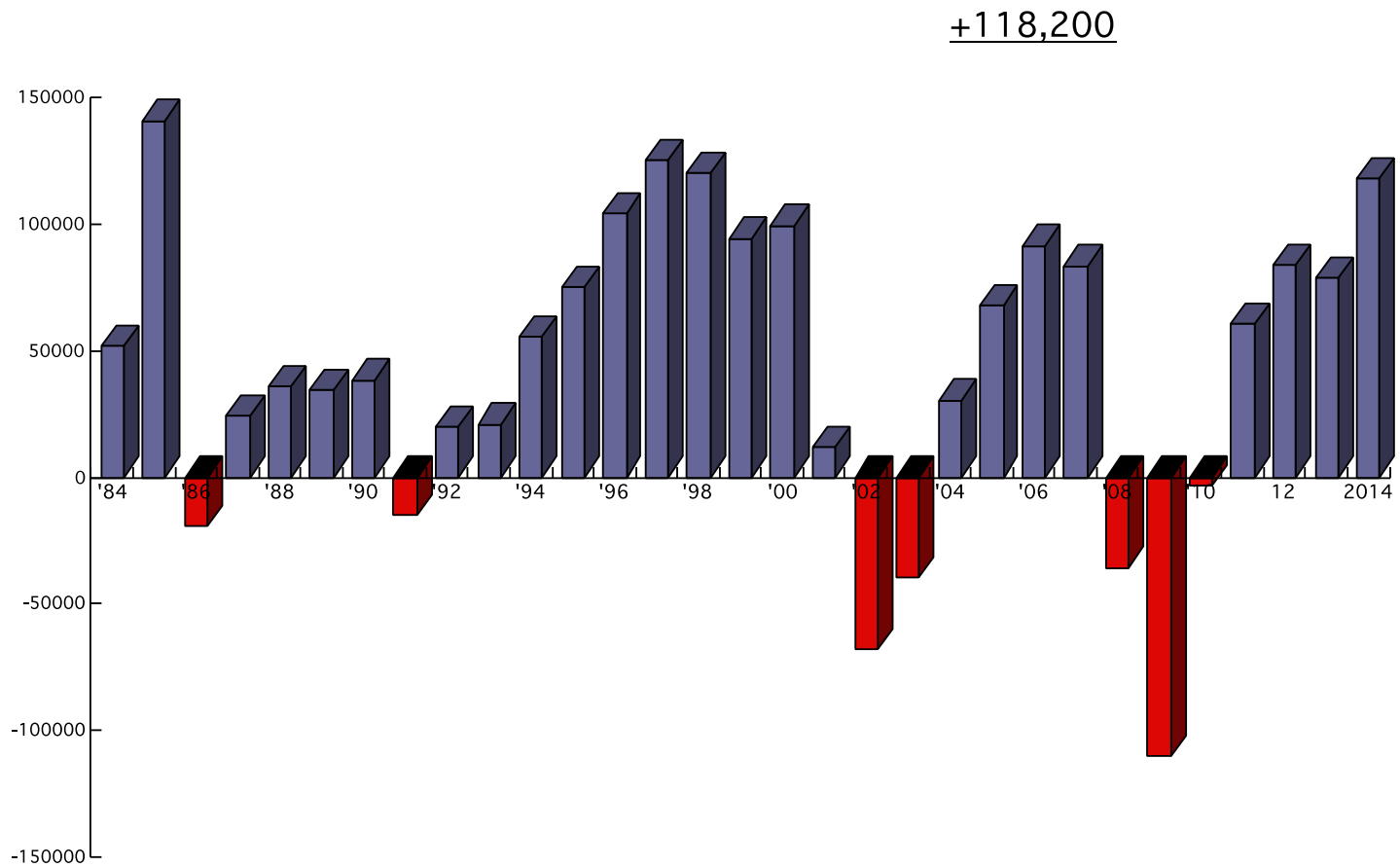
## TOP 10 U.S. METRO AREAS FOR JOB GROWTH

Number change April 2013-April 2014

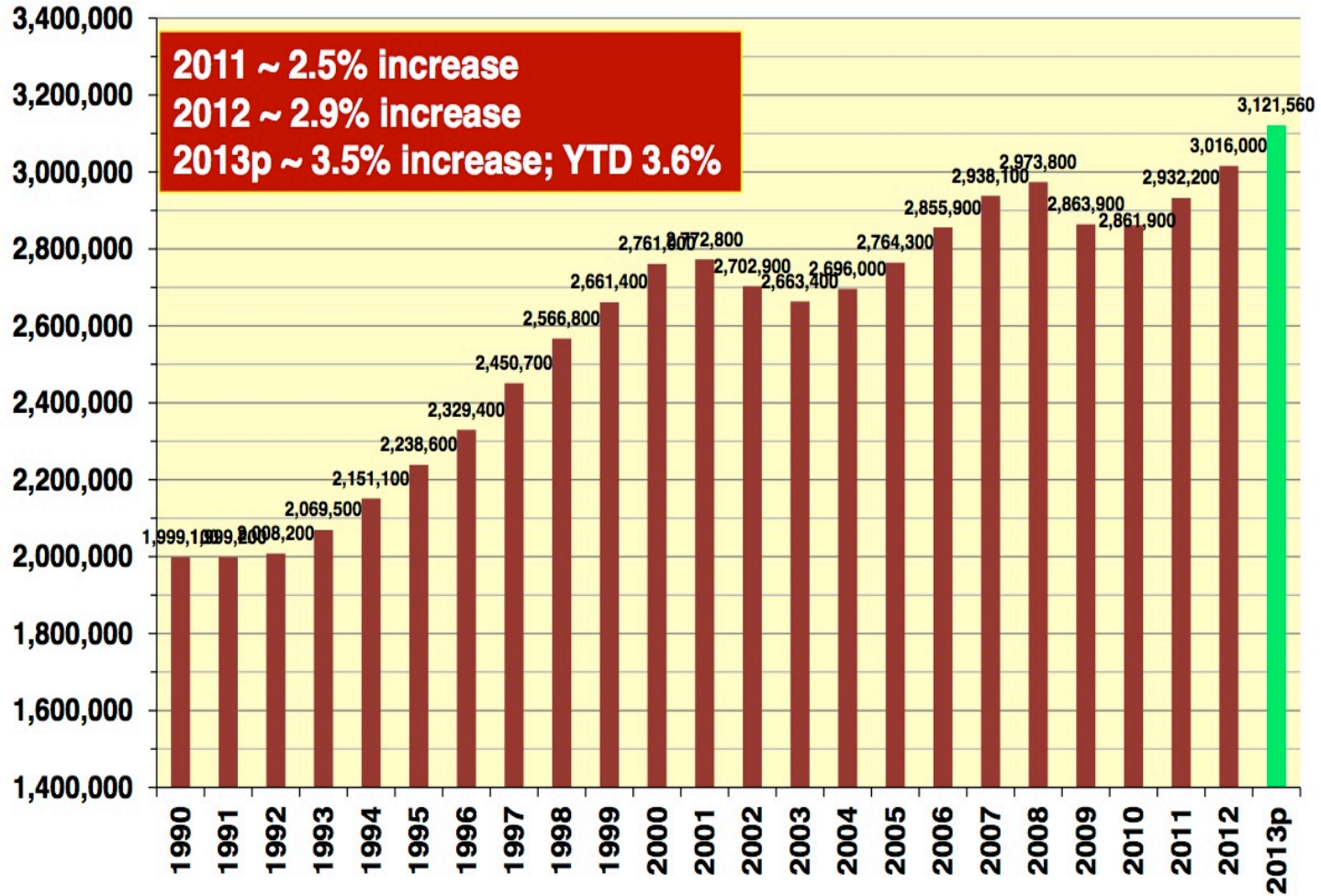




# D-FW Job Growth



# D-FW Annual Jobs



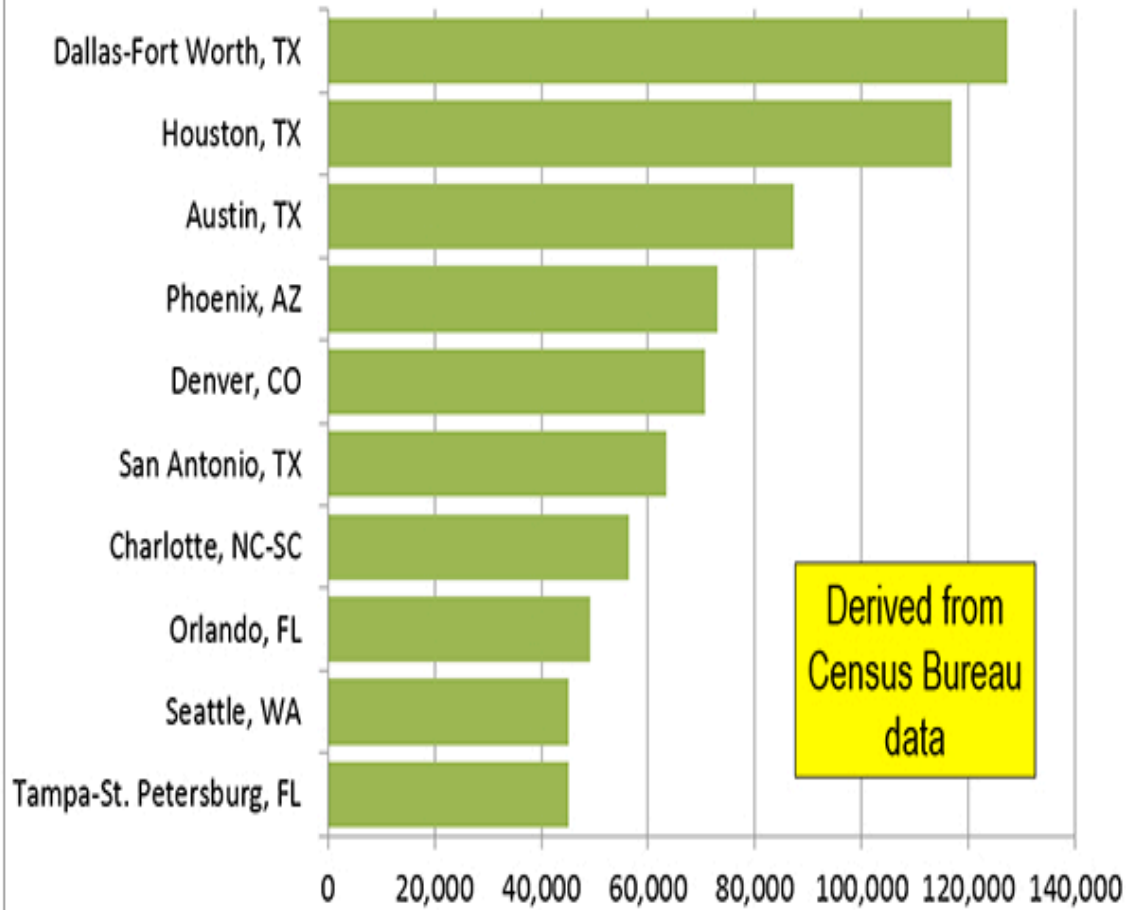
# 2010-2012 Population Changes

– <b>DFW</b>	<b>274,781 (4.3%)</b>
– <b>New York</b>	<b>264,451 (1.3%)</b>
– <b>Houston</b>	<b>256,579 (4.3%)</b>
– <b>Washington D.C.</b>	<b>224,110 (4.0%)</b>
– <b>Los Angeles</b>	<b>224,079 (1.7%)</b>
– <b>Miami</b>	<b>198,060 (3.5%)</b>
– <b>Austin</b>	<b>118,017 (6.8%)</b>
– <b>San Antonio</b>	<b>91,495 (4.2%)</b>

Source: U.S. Census Bureau

# Largest Domestic Migration Growth

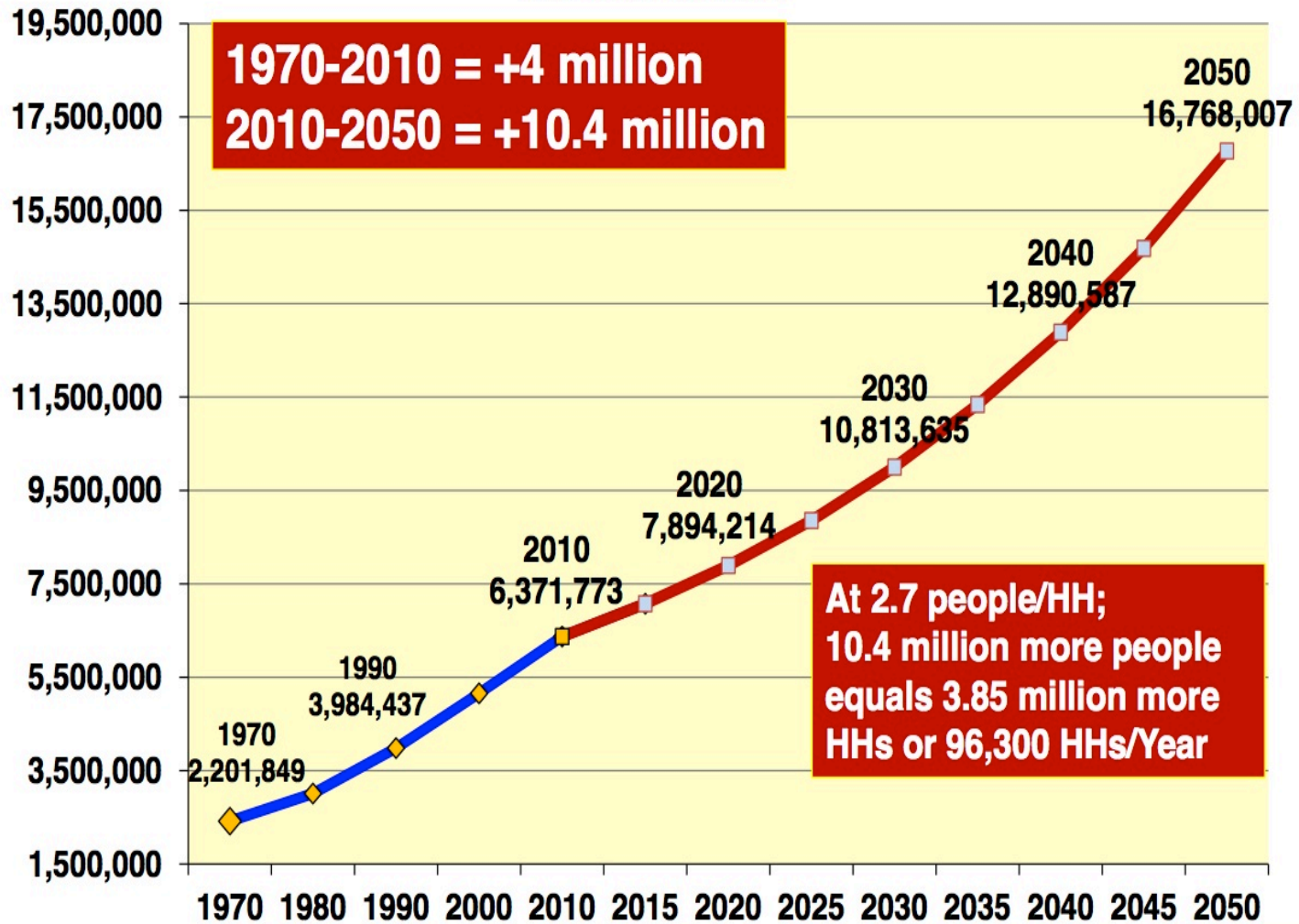
MAJOR METROPOLITAN AREAS: 2010-2013



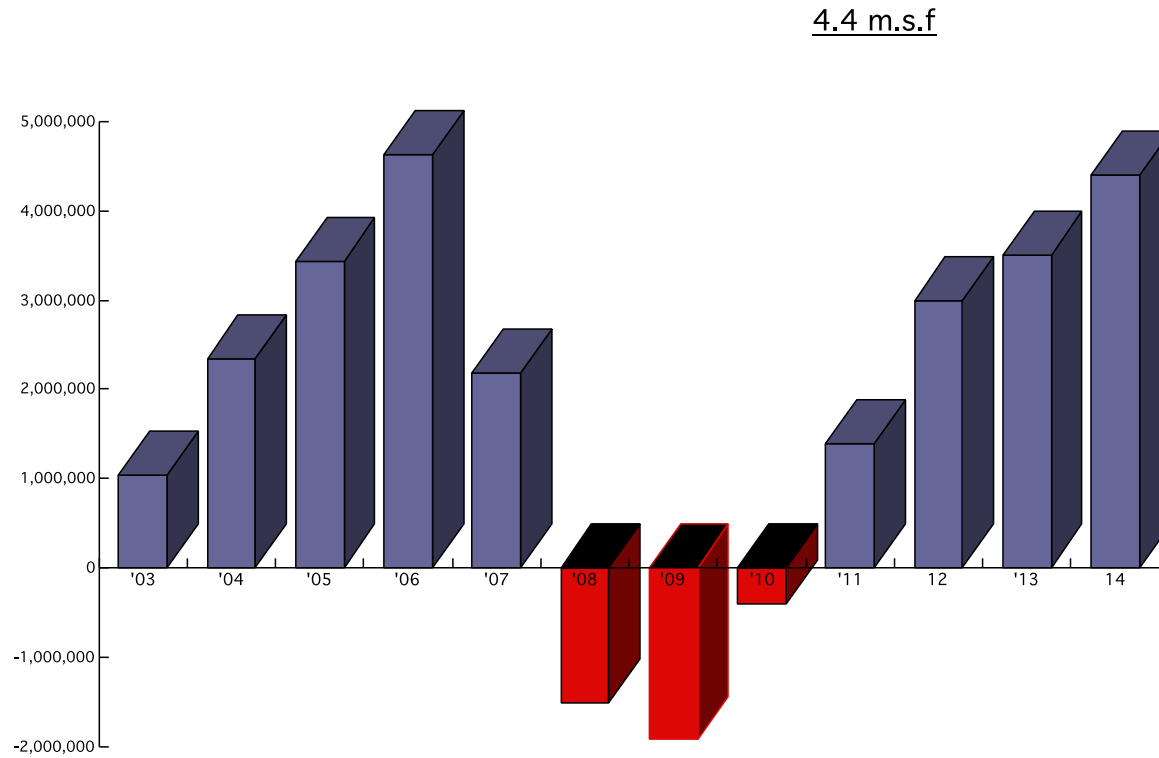


# D-FW MSA Population 1970-2050

Collin, Dallas, Denton, Delta, Ellis, Hunt, Johnson, Kaufman, Parker, Rockwall, Tarrant and Wise Counties



# D-FW Office Leasing

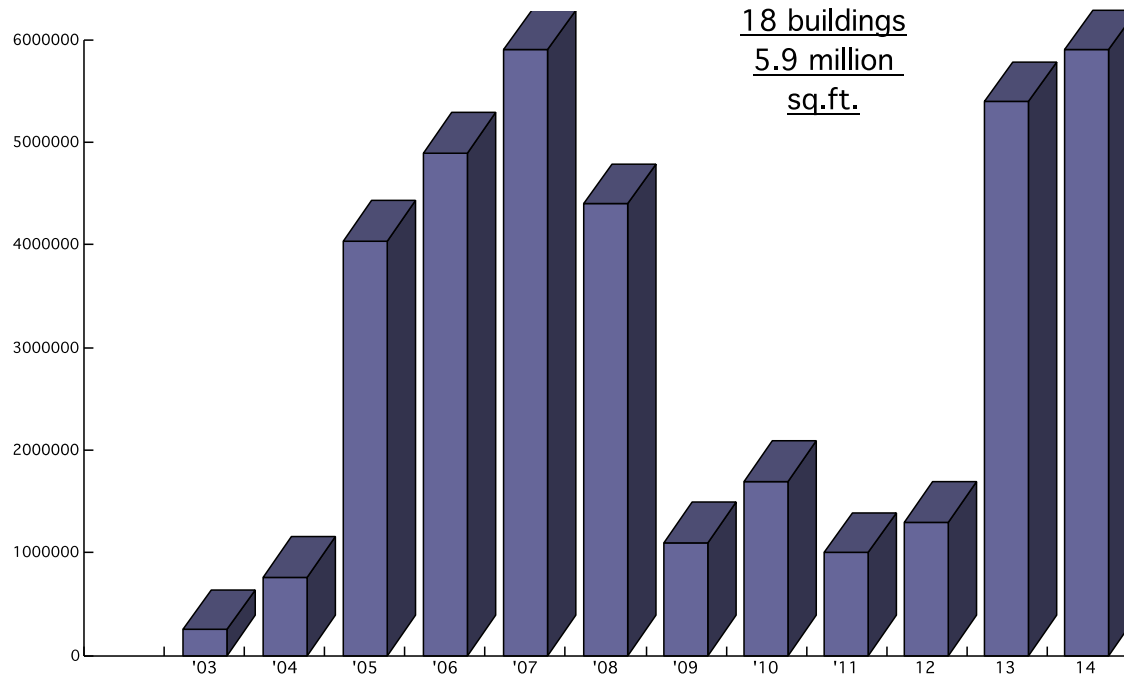


# Top U.S. Office Leasing Markets for 2013

New York	7.1 million sq.ft.
<b>Dallas</b>	<b>4.2 million sq.ft.</b>
Houston	3.9 million sq.ft.
San Jose	2.4 million sq.ft.
Atlanta	2.3 million sq.ft.
Denver	1.9 million sq.ft.
Boston	1.7 million sq.ft.
Seattle	1.7 million sq.ft.
Chicago	1.5 million sq.ft.

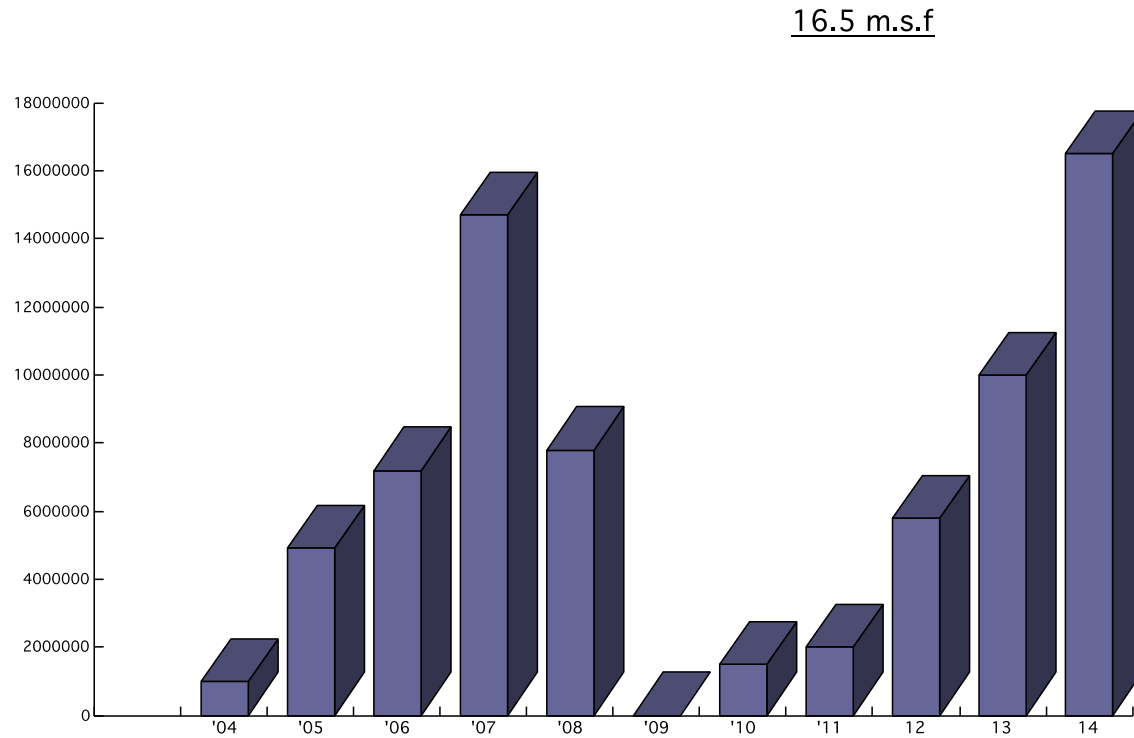
Source: Cassidy Turley

# D-FW Office Building

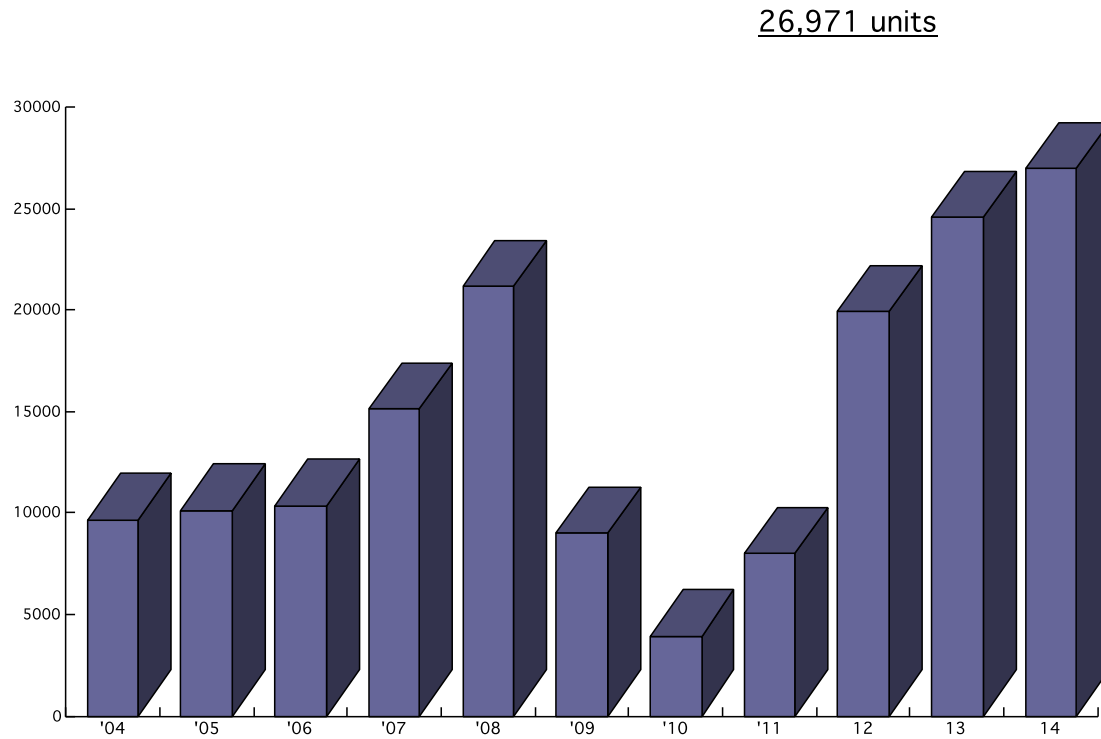




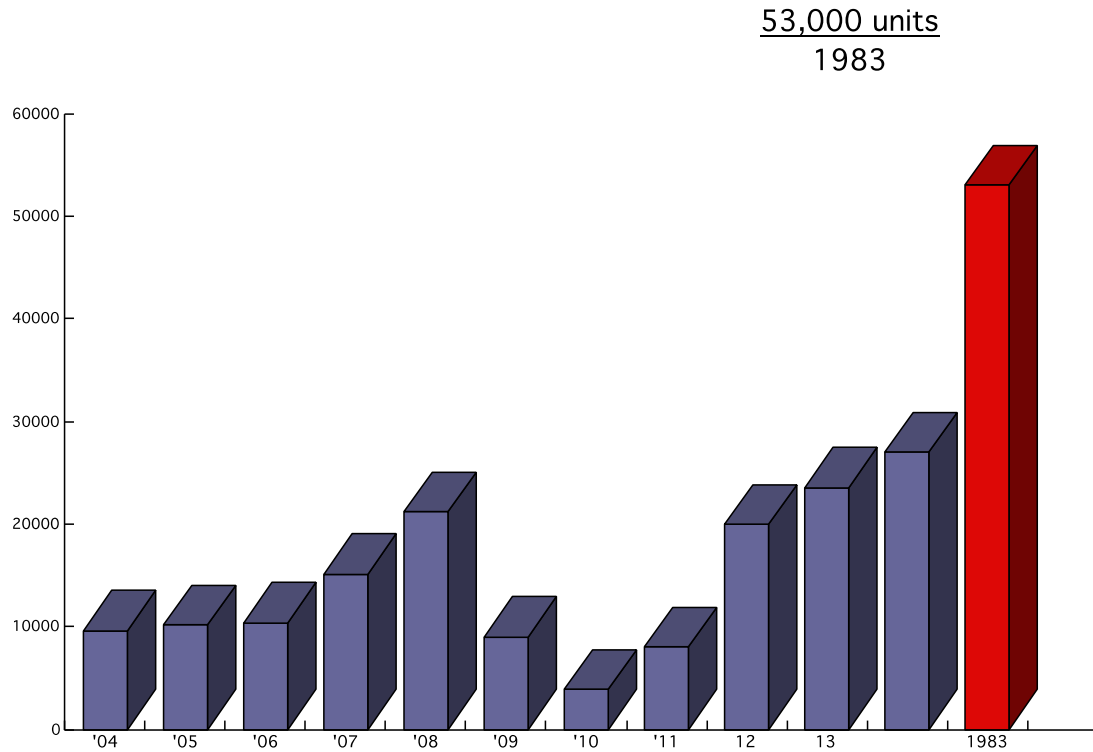
# D-FW Industrial Building



# D-FW Apartment Building



# D-FW Apartment Building



# Top MF Building Markets

D-FW

26,971

New York

25,405

Washington, D.C.

25,315

Houston

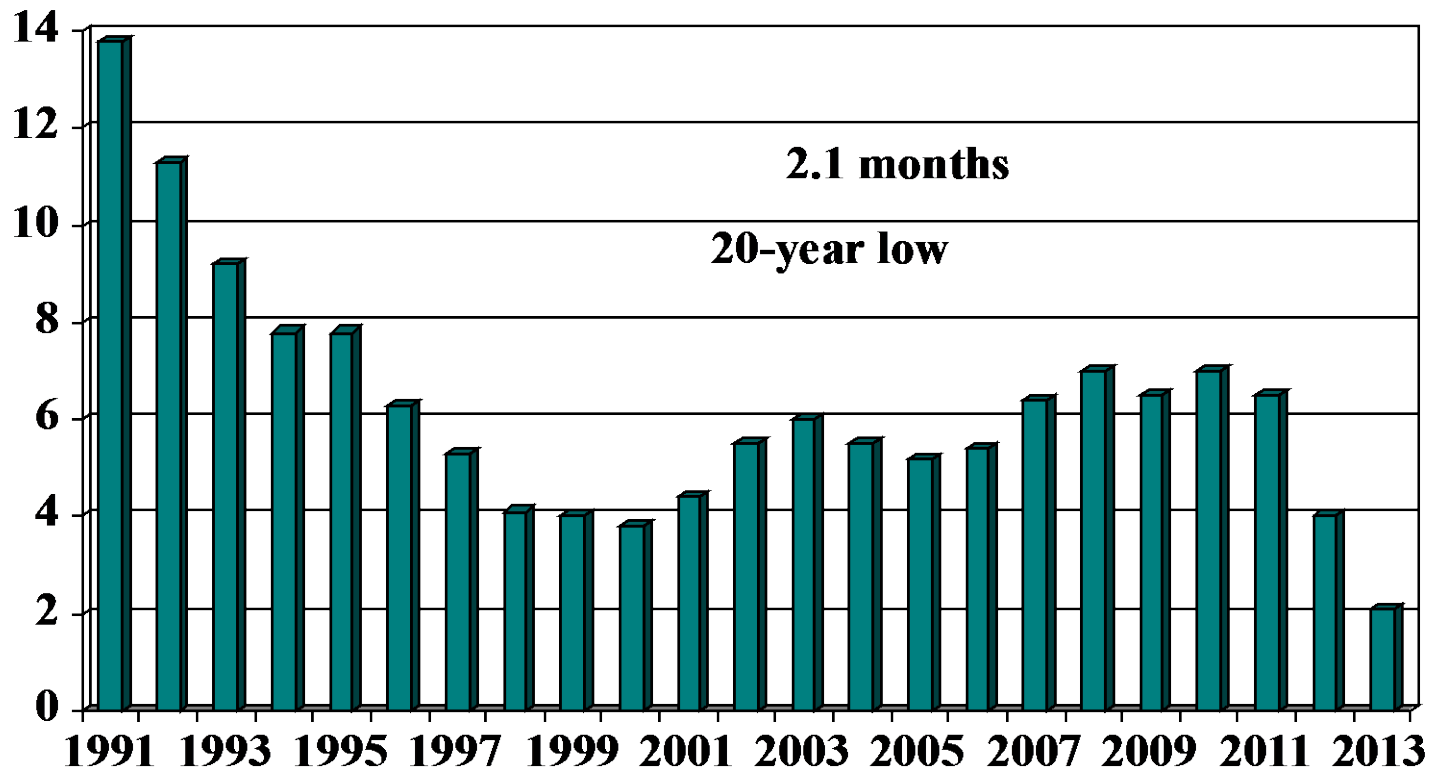
19,320

Seattle

14,728



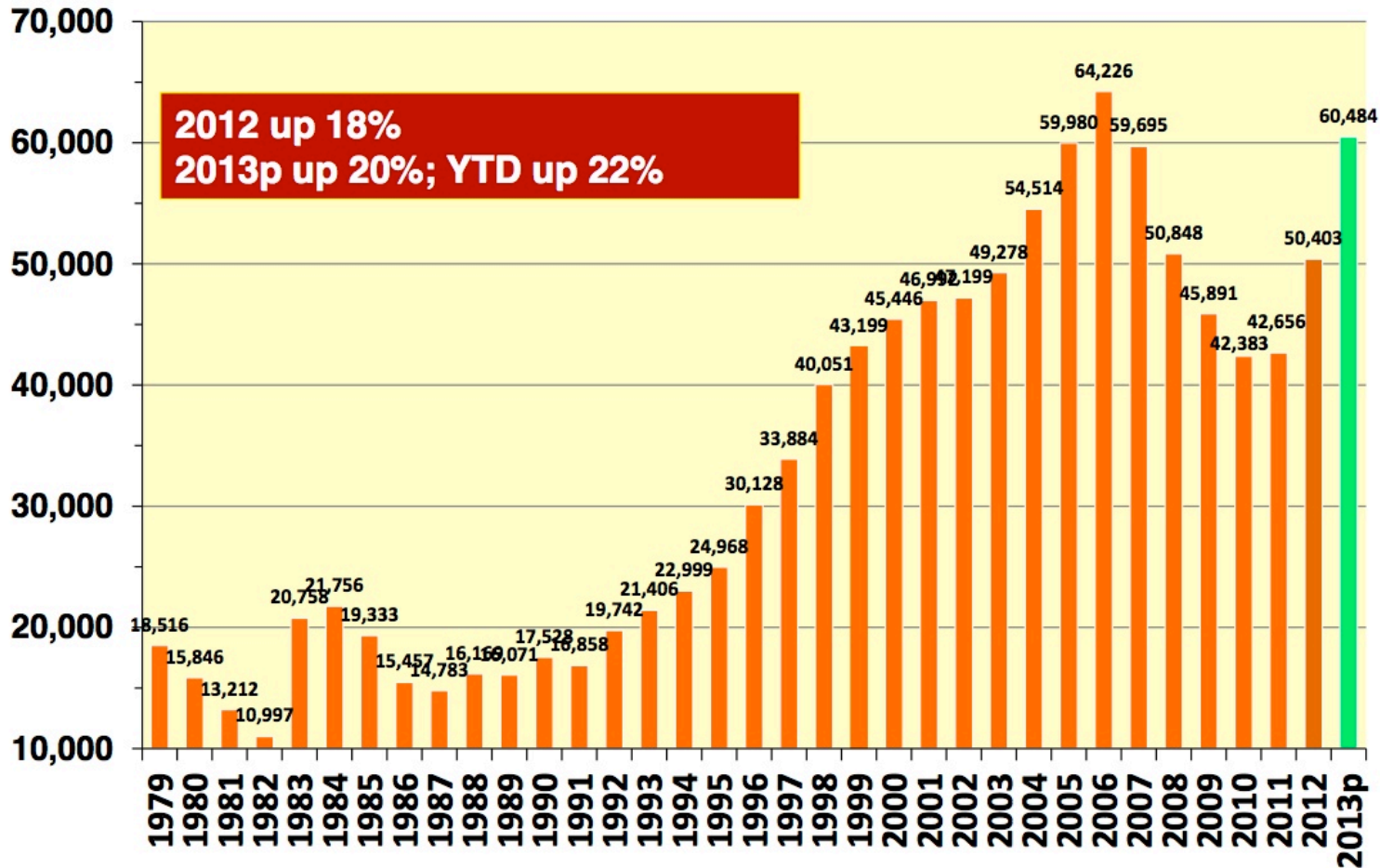
## D-FW Home Listings



- Supply of preowned houses:

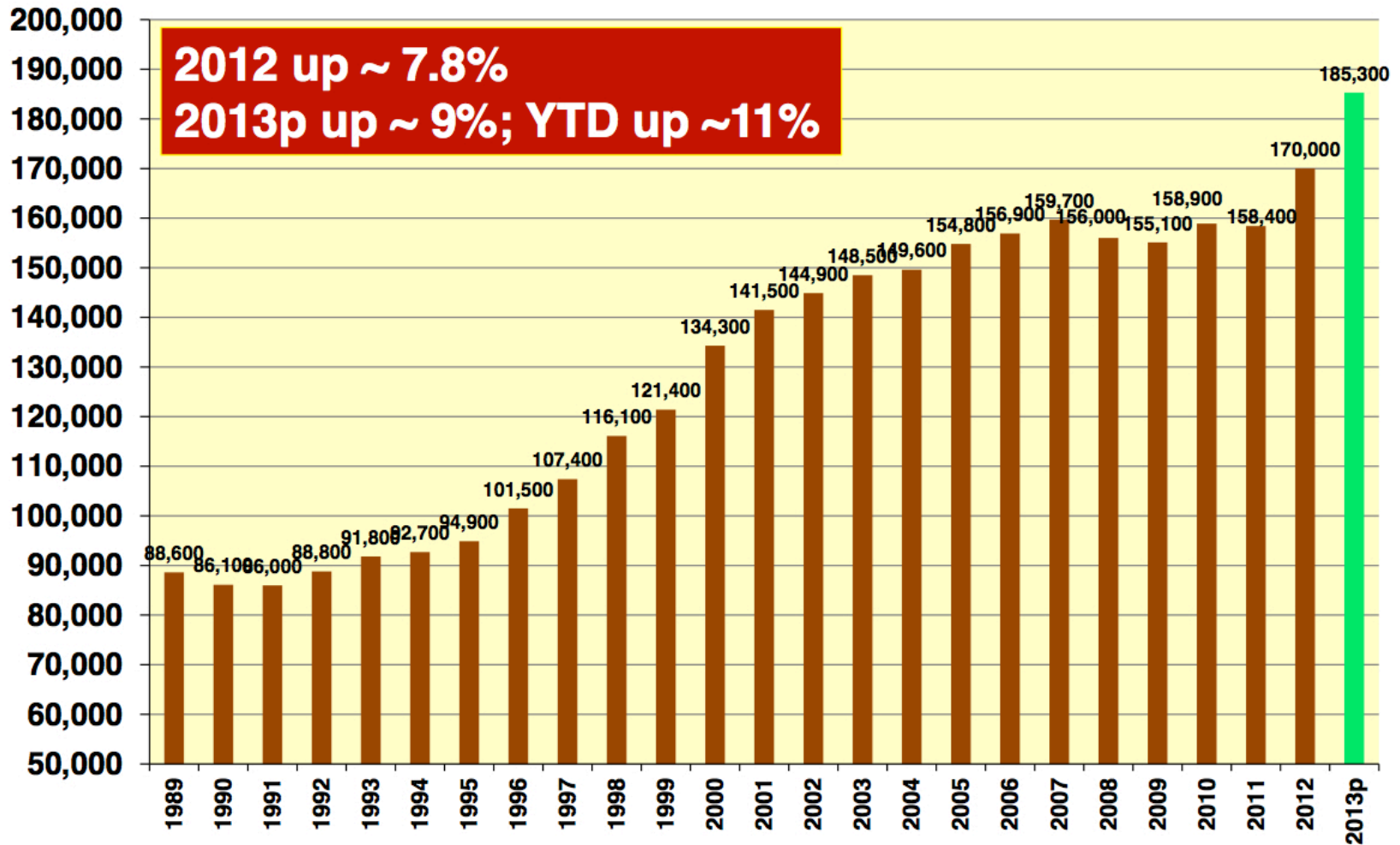
Plano	1.1 months
Grapevine	1.3 months
Richardson	1.0 months
Coppell	1.2 months
Allen	1.5 months
McKinney	1.6 months

# Dallas Annual Home Sales



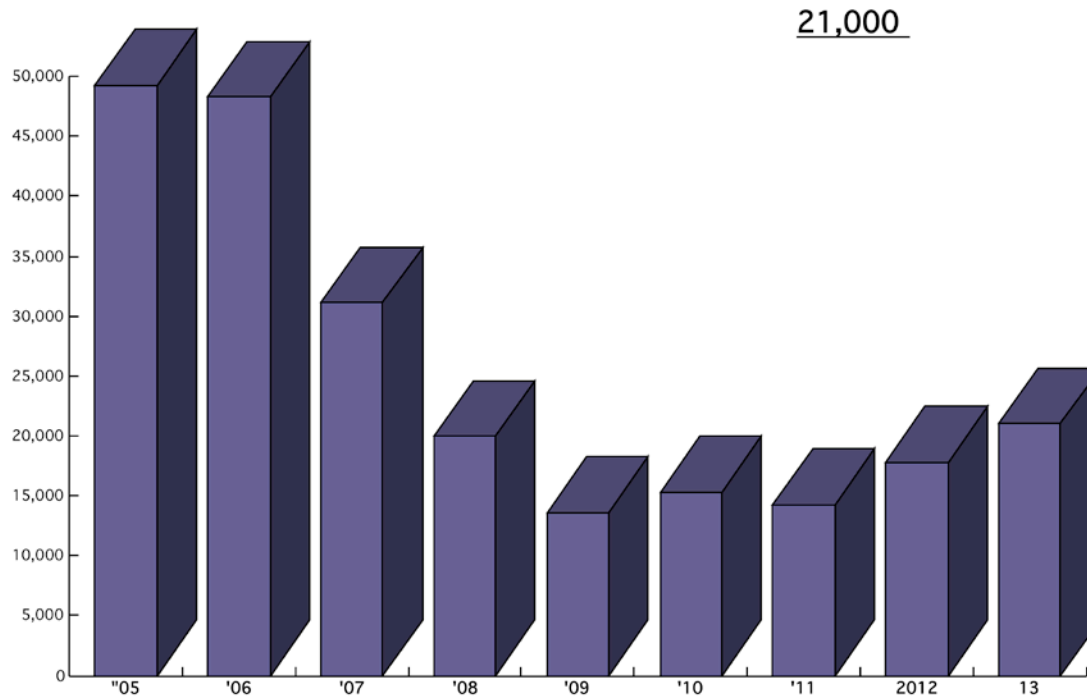
Source: Real Estate Center at Texas A&M

# Dallas Median Home Prices

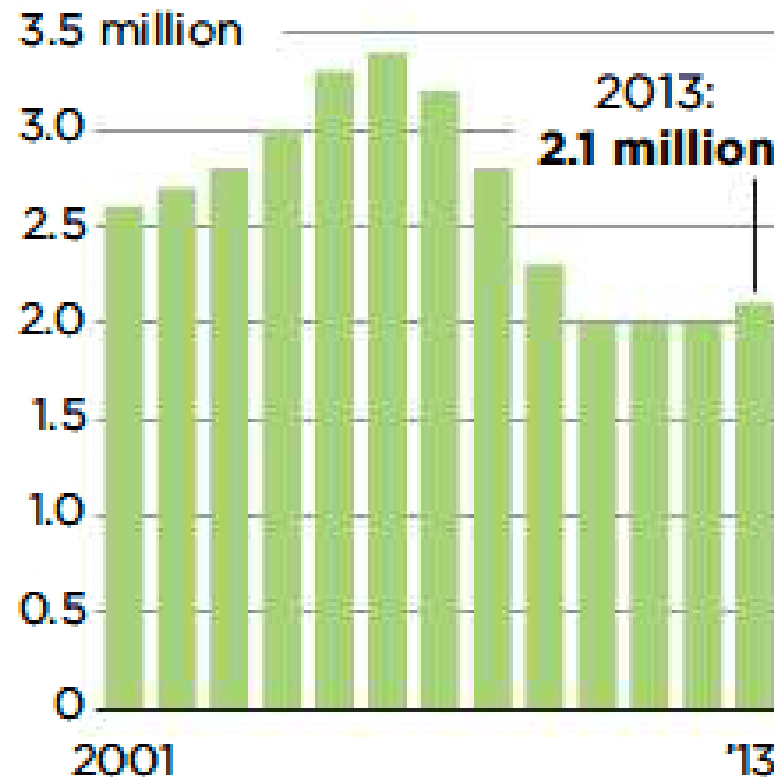


Source: MetroTex Realtors®; Real Estate Center at Texas A&M University

# North Texas Home Starts



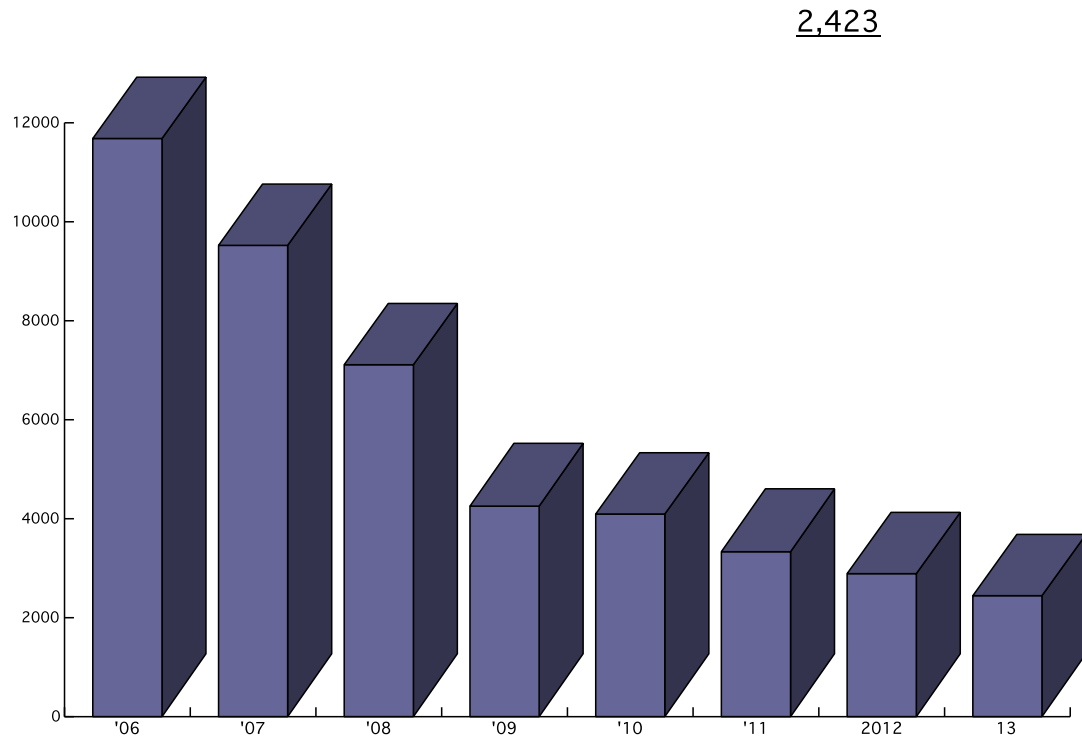
# Homebuilding jobs



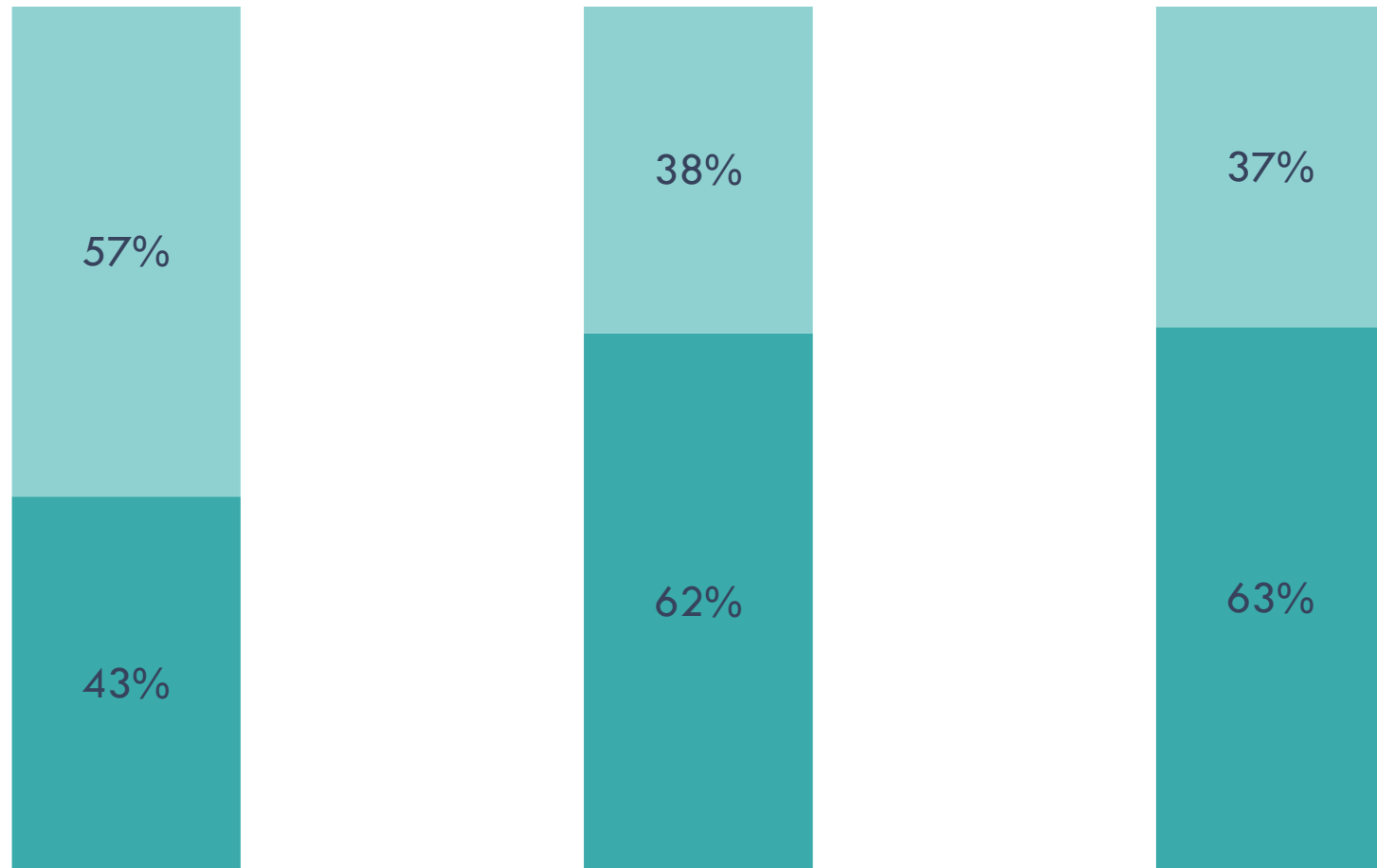
SOURCE: National Association of Home Builders

Troy Oxford/Staff Artist

# D-FW New Home Inventory



# Households with Children (2013)



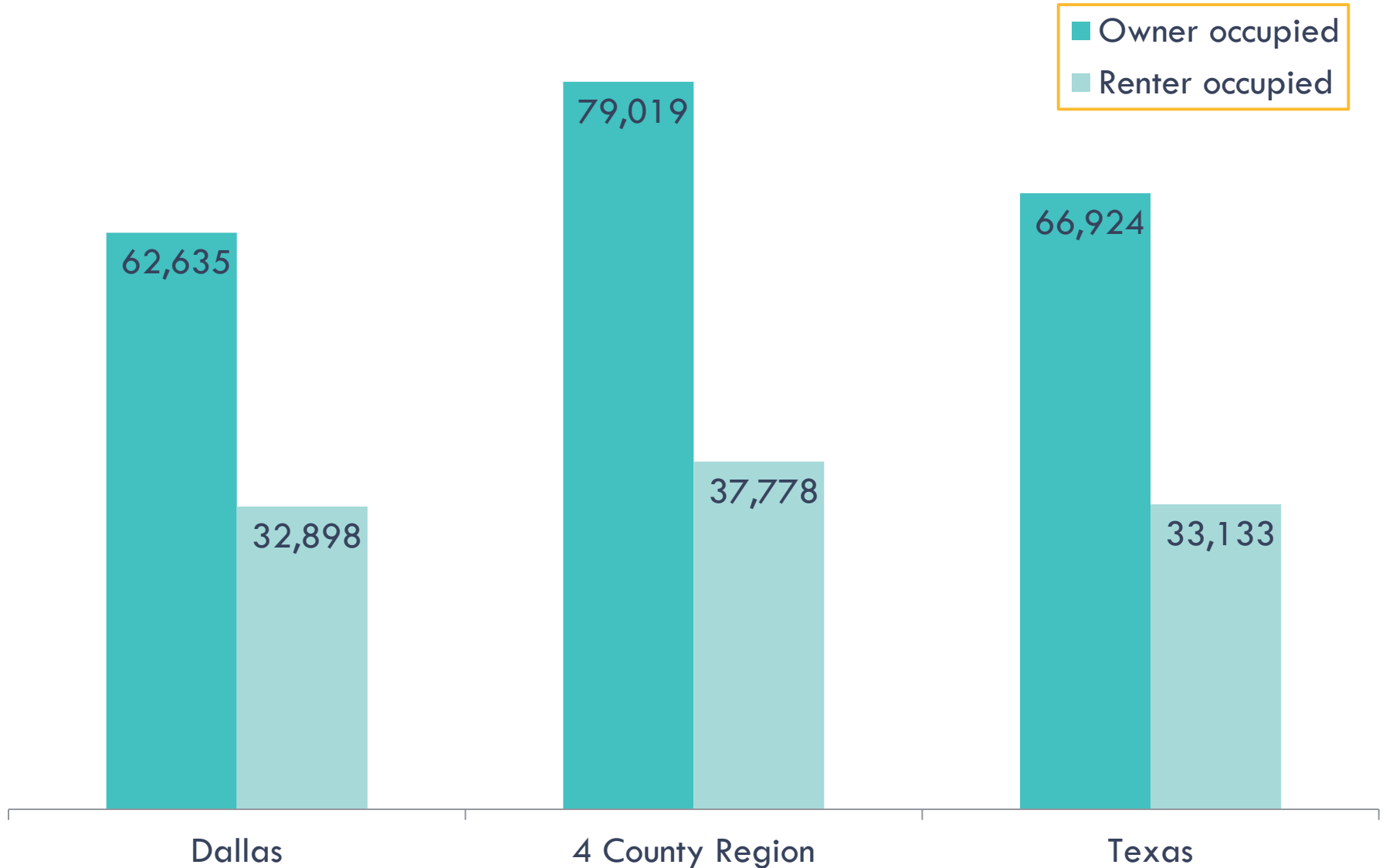
Dallas

4 County Region

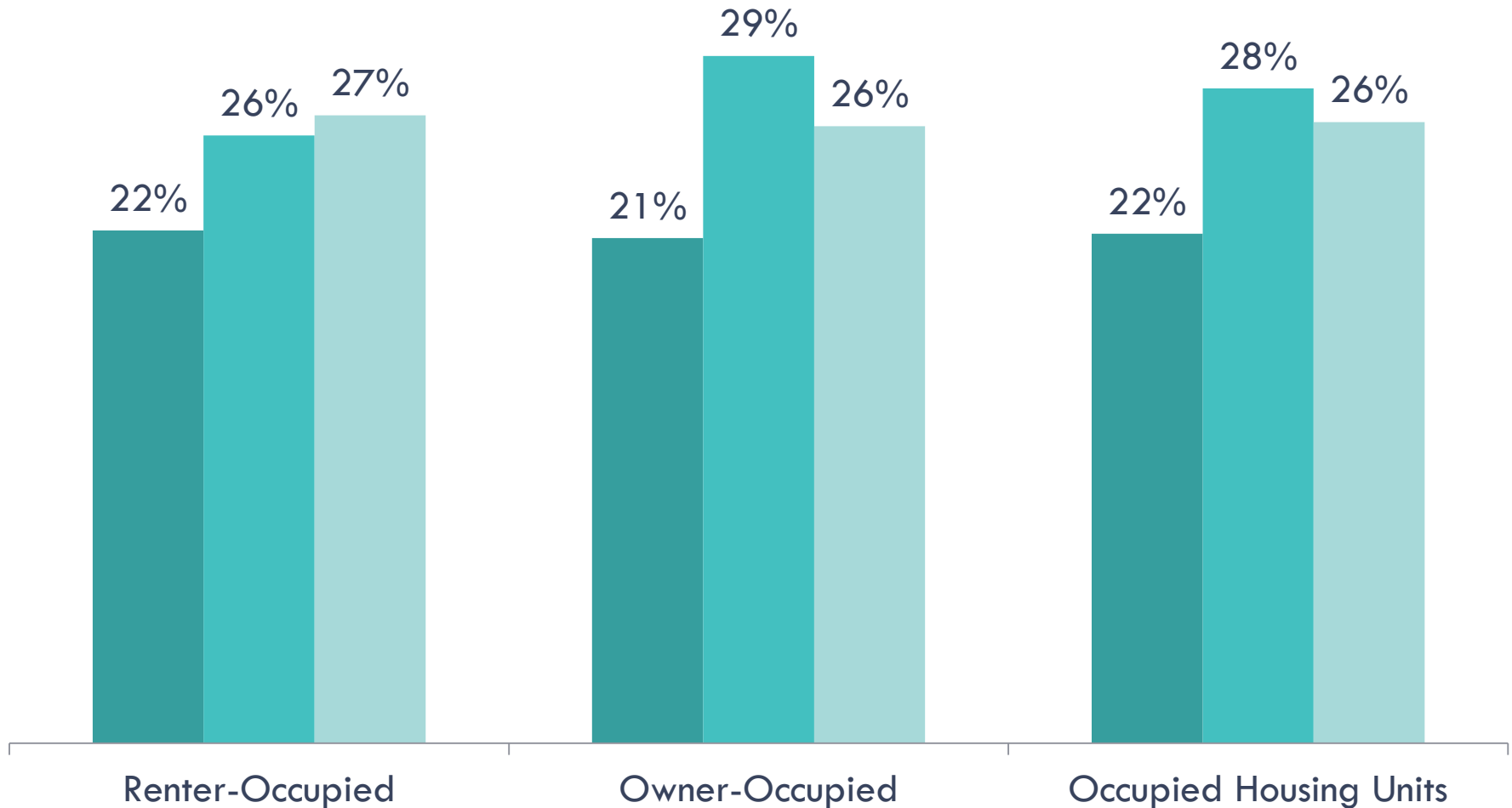
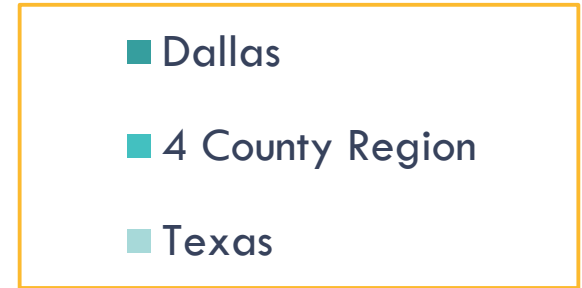
Texas



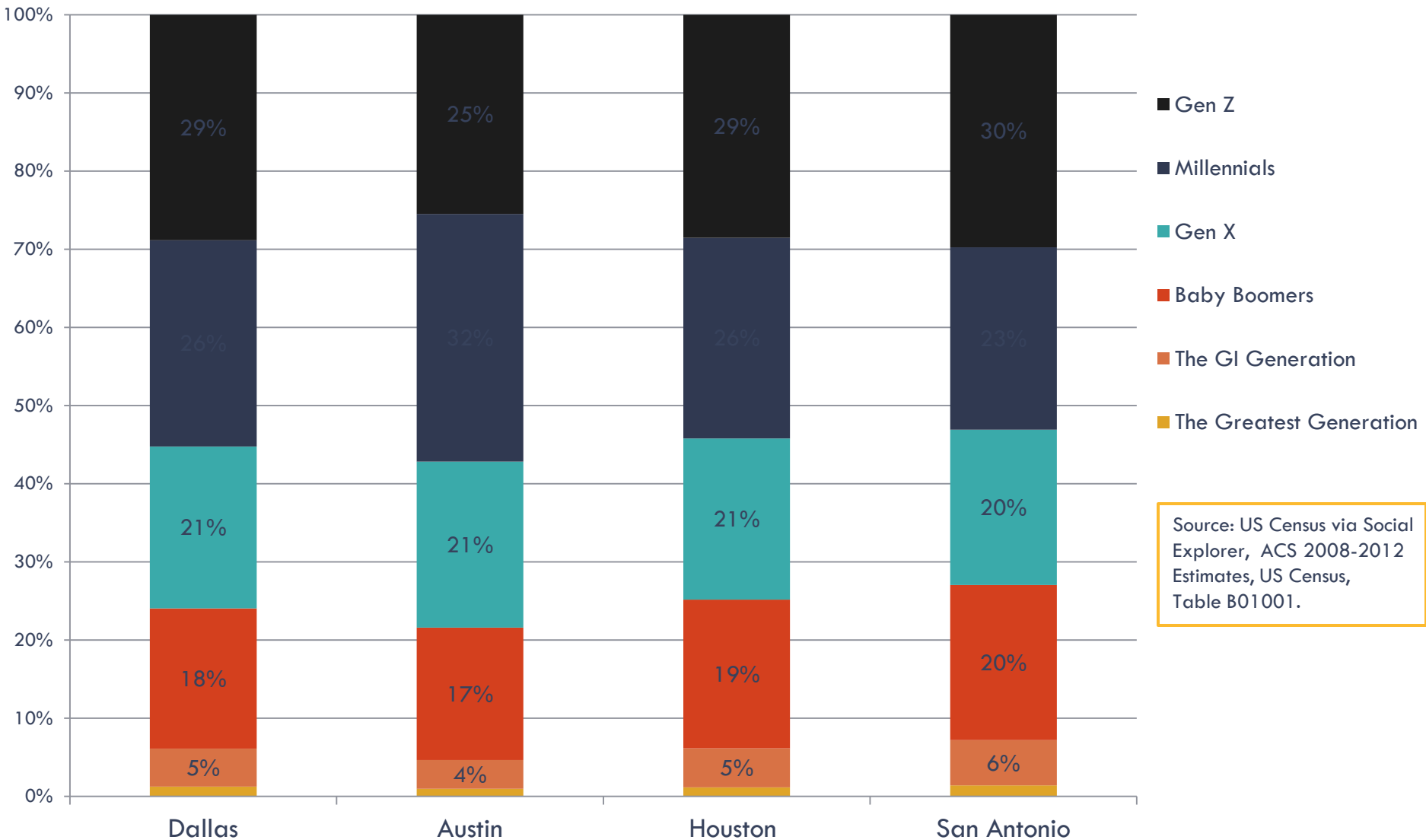
# Median Household Income by Tenure (2013)



# Percent of Households that have Children Under 18



# Texas Cities by Generational Composition

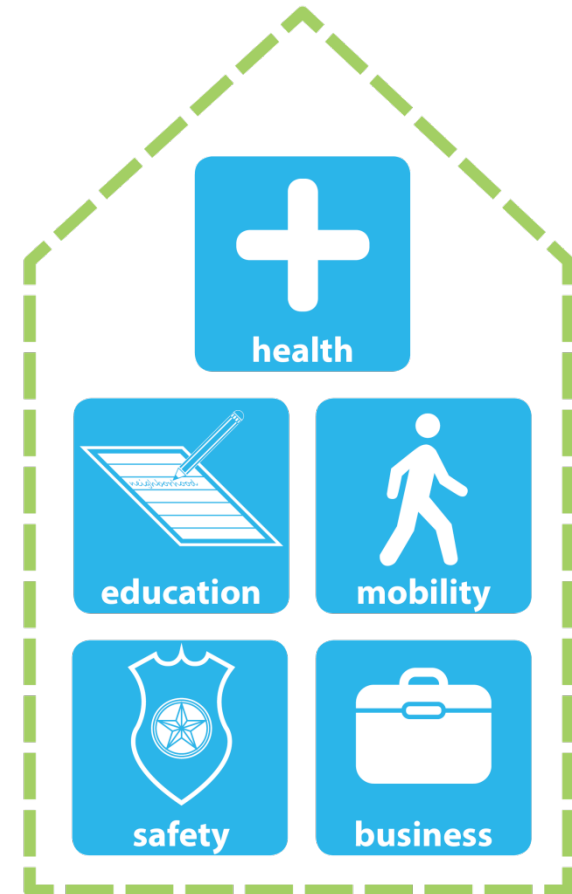


# *NeighborhoodPlus*

The future of living in our city

## Overarching Goals:

- Foster vital neighborhoods throughout Dallas
- **Think beyond just housing**  
– encompass education, health, mobility, business, and safety



# Purpose of the Plan

- Shape Housing Policy and set a new direction for housing development in Dallas.
- Strengthen Neighborhood Revitalization policy and develop a planning and decision-making framework to guide community investment decisions.
- Acknowledge the inter-dependence of local government with other public and private agencies, non-profits and philanthropic institutions.
- Establish a collaborative relationship that leverages planning and investment choices to strengthen Dallas' regional leadership.

# Public Engagement Workshops



## Power in Partnerships

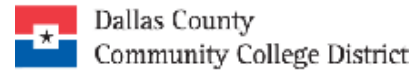
- Overwhelming support has been demonstrated by our partners.
- Countless large and small programs and projects deliver successful results to our residents and neighbors.

*“If you want to go fast, go alone. If you want to go far, go together.” – African proverb*

# Partnerships in Action



Parkland

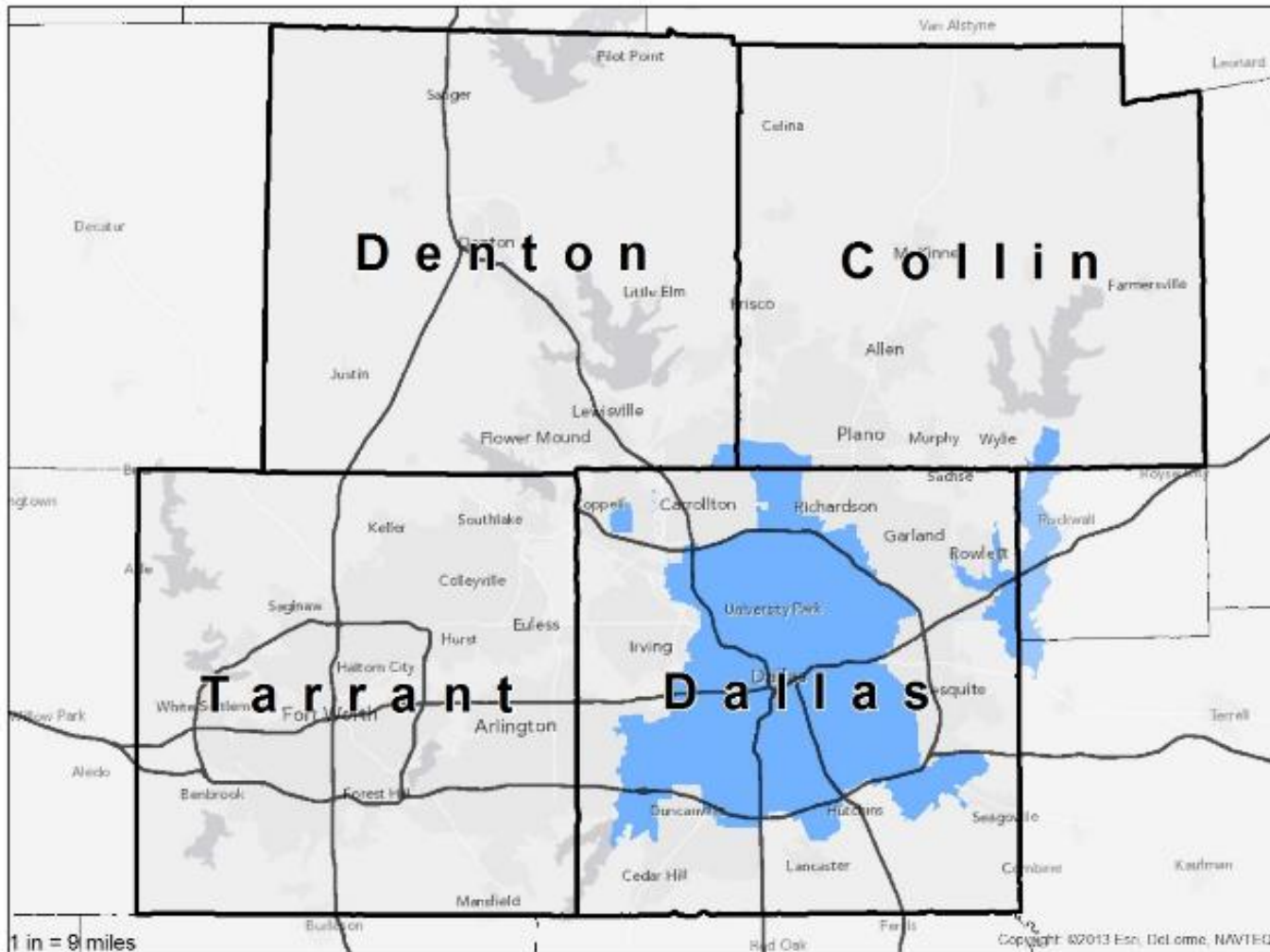




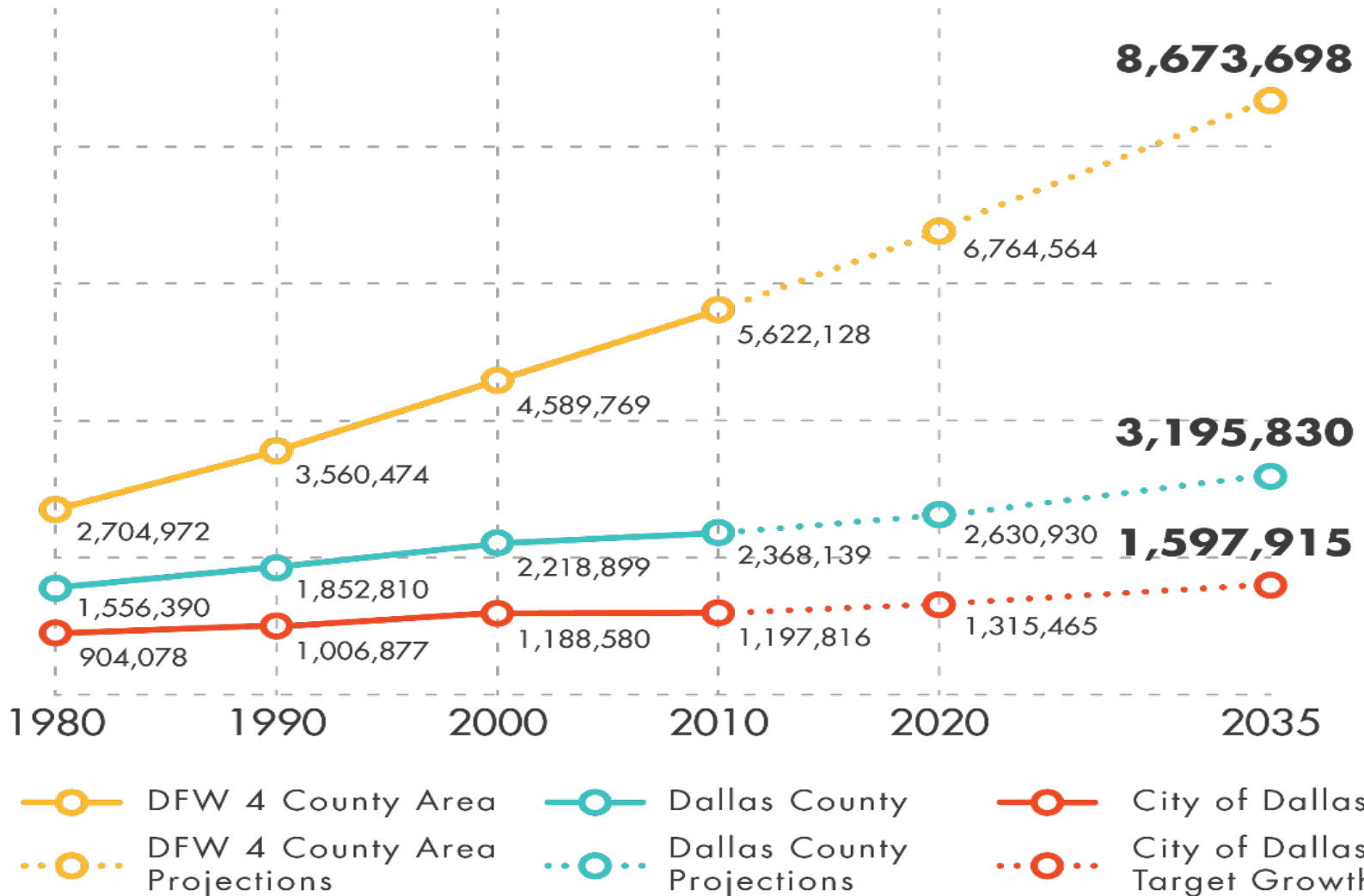
# Understanding Dallas in the Regional Context

- “If you don’t know where you’ve come from, you don’t know where you are going” – Maya Angelou

# Dallas is the engine of the 4<sup>th</sup> largest metropolitan economy in the nation

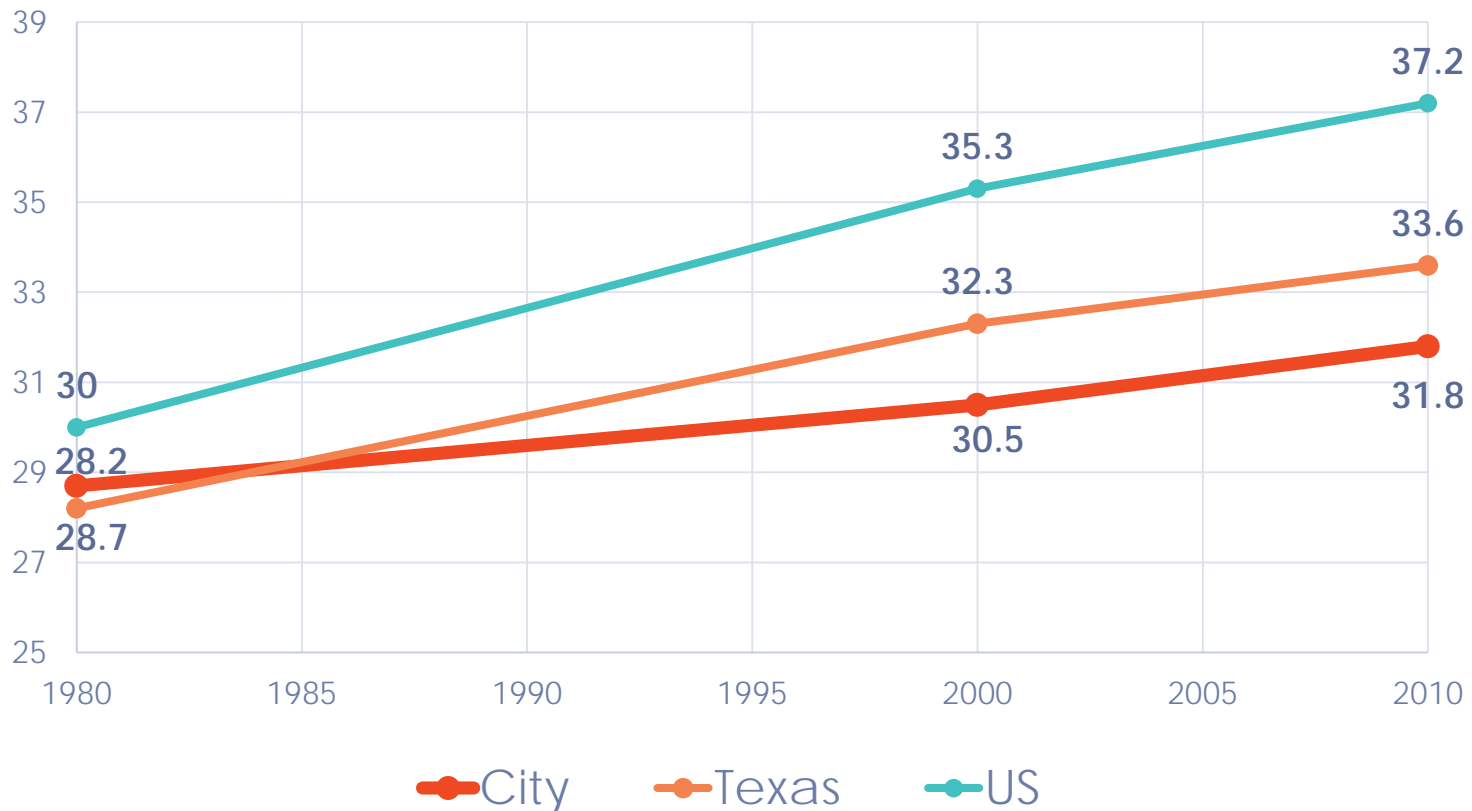


# Steady Population Growth



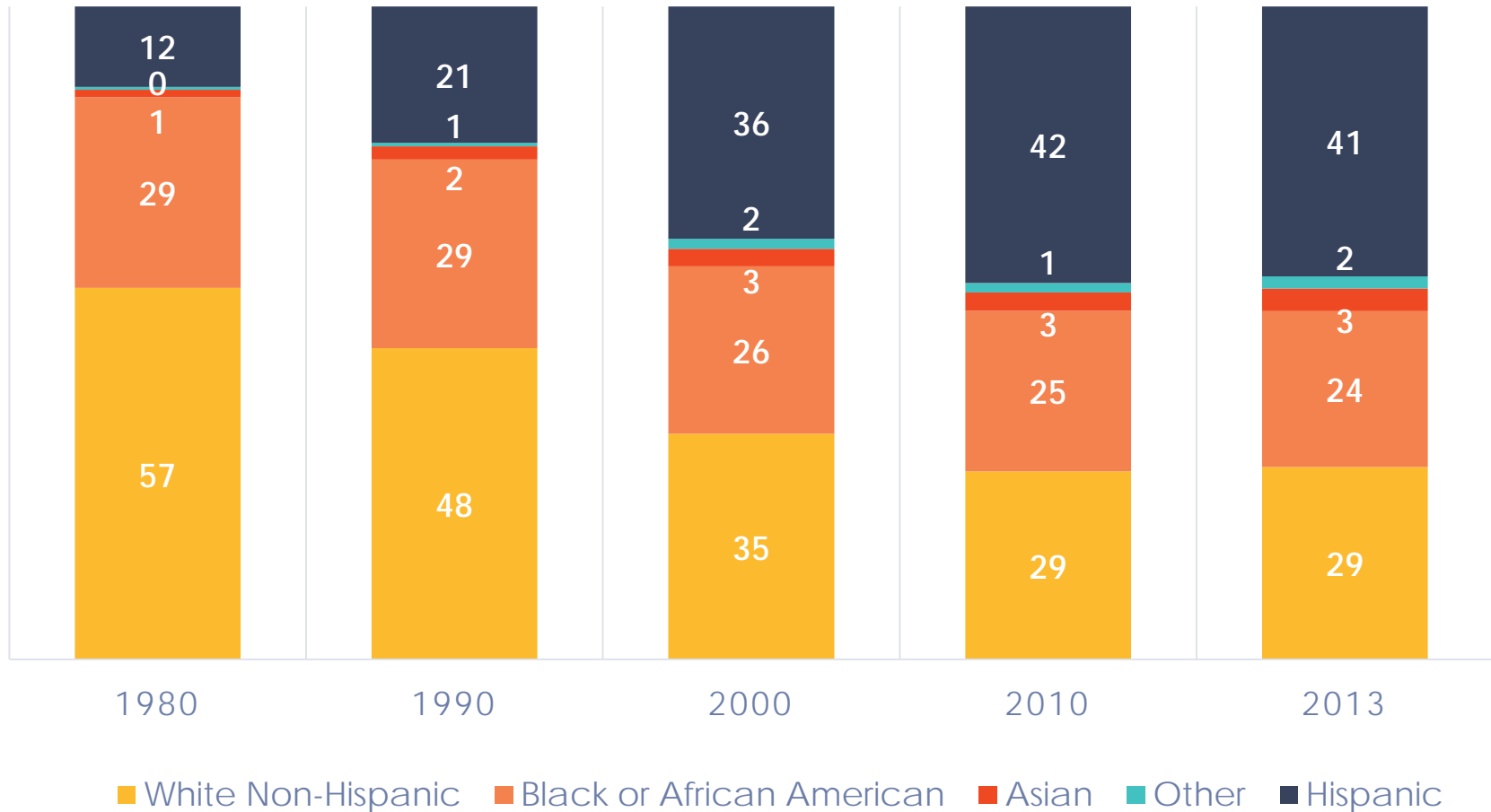
# Dallas is younger than the Region, Texas and the US by an increasing margin.

Median Age, 1980-2010



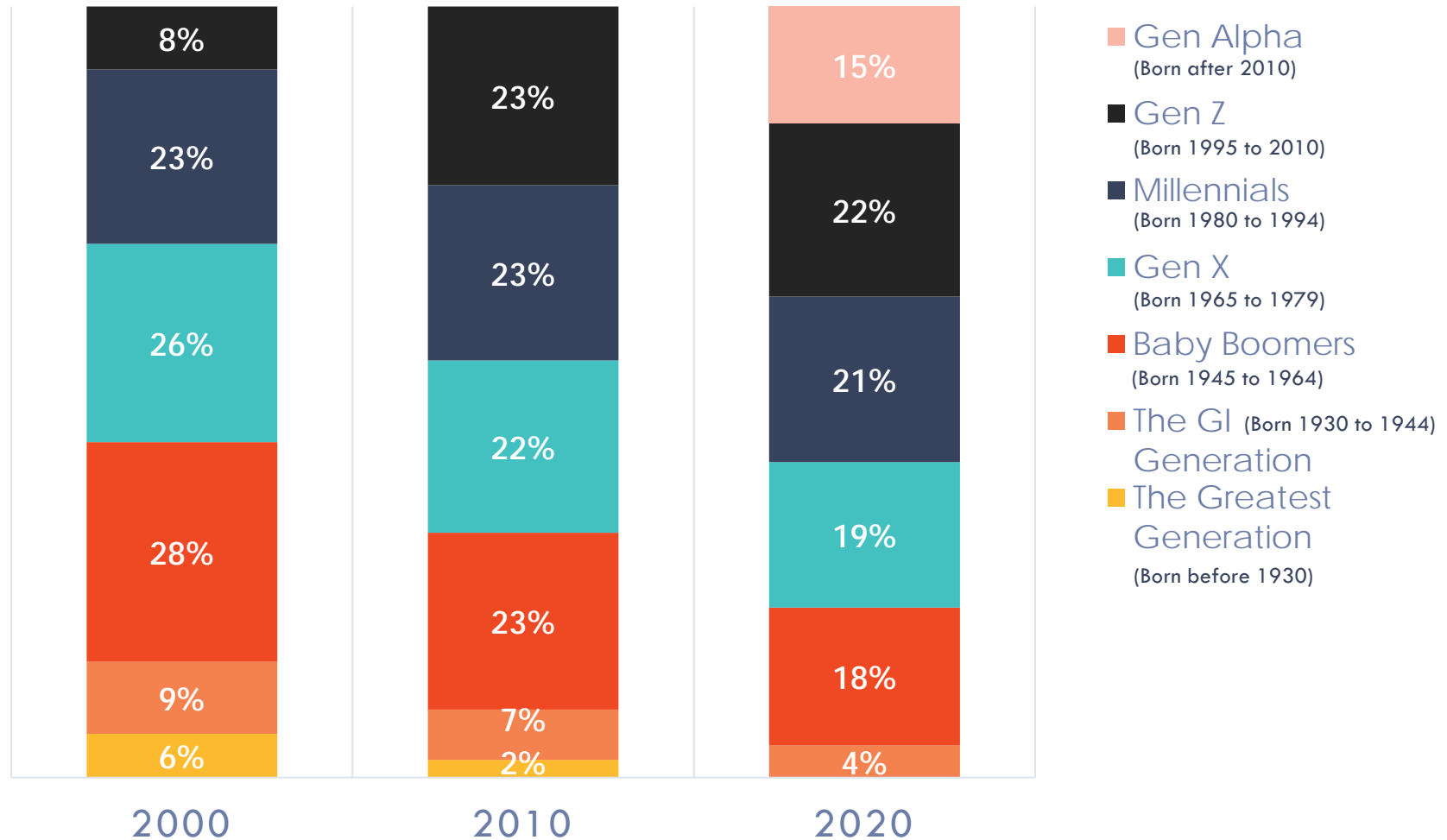
# Change in Ethnic Mix

## Change in Ethnic Mix, 1980 to 2013



# Change in Generational Split

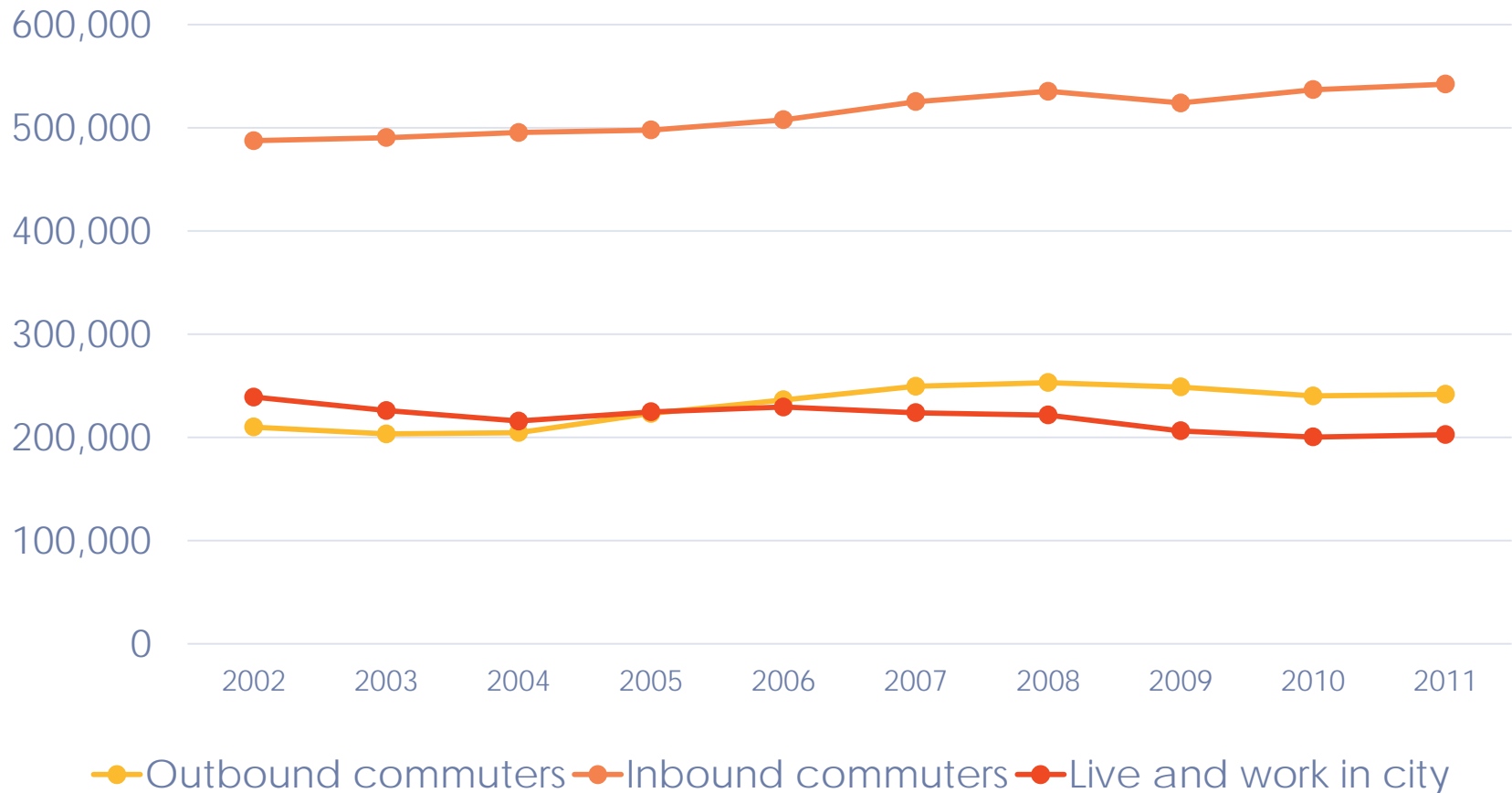
## Change in Generations: Dallas County Over Time



Source: Historical Population Data and Forecasts from Woods & Pool for Dallas County

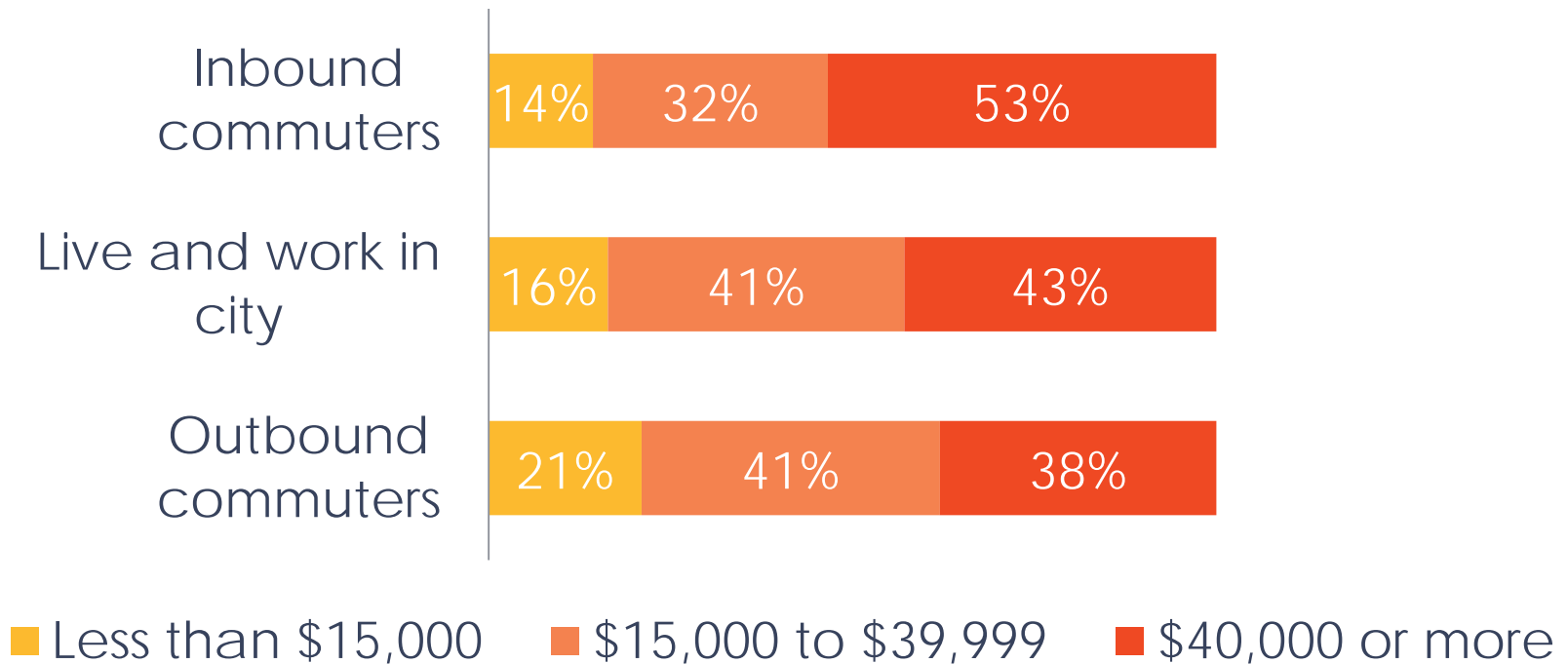
# Inbound commuters make up a large segment of Dallas' workforce

## Residence of workforce, 2002-2011



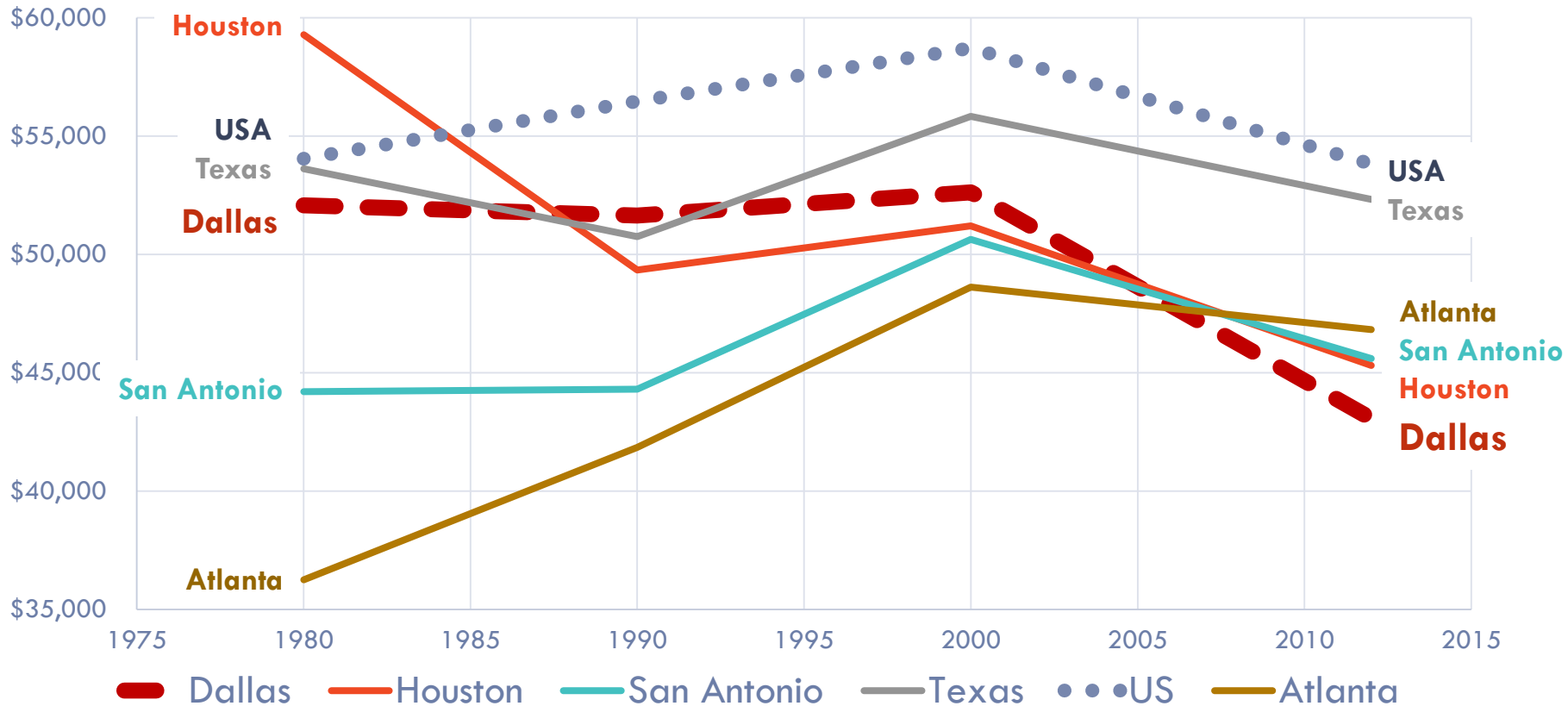
# Inbound commuters have higher incomes among Dallas' workforce

## Income distribution of workforce, 2011





# Median Income in Dallas is declining sharply



Sources: Median Household Income (Adjusted to 2013 Dollars) retrieved from Social Explorer of US Decennial Census 1980 (T53), 1990 (T43), 2000 (T93), and ACS 2008-2012 5 year estimates (T57)

# Dallas has a declining share of middle income households

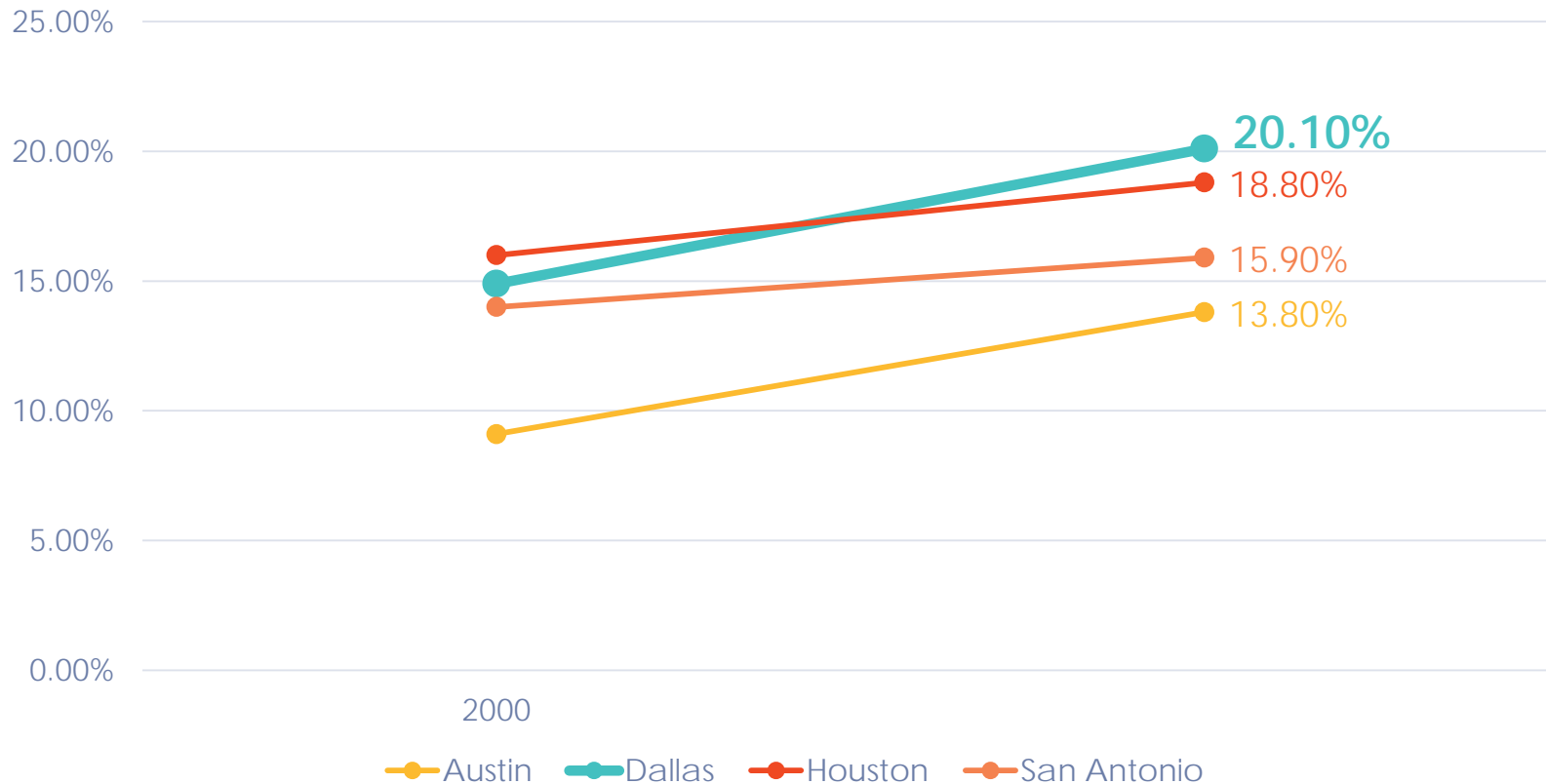
Change in Share of Households (2000-2012)



Source: Census 2000 (in 2012 Dollars) and American Community Survey 2012 1 Year Estimates

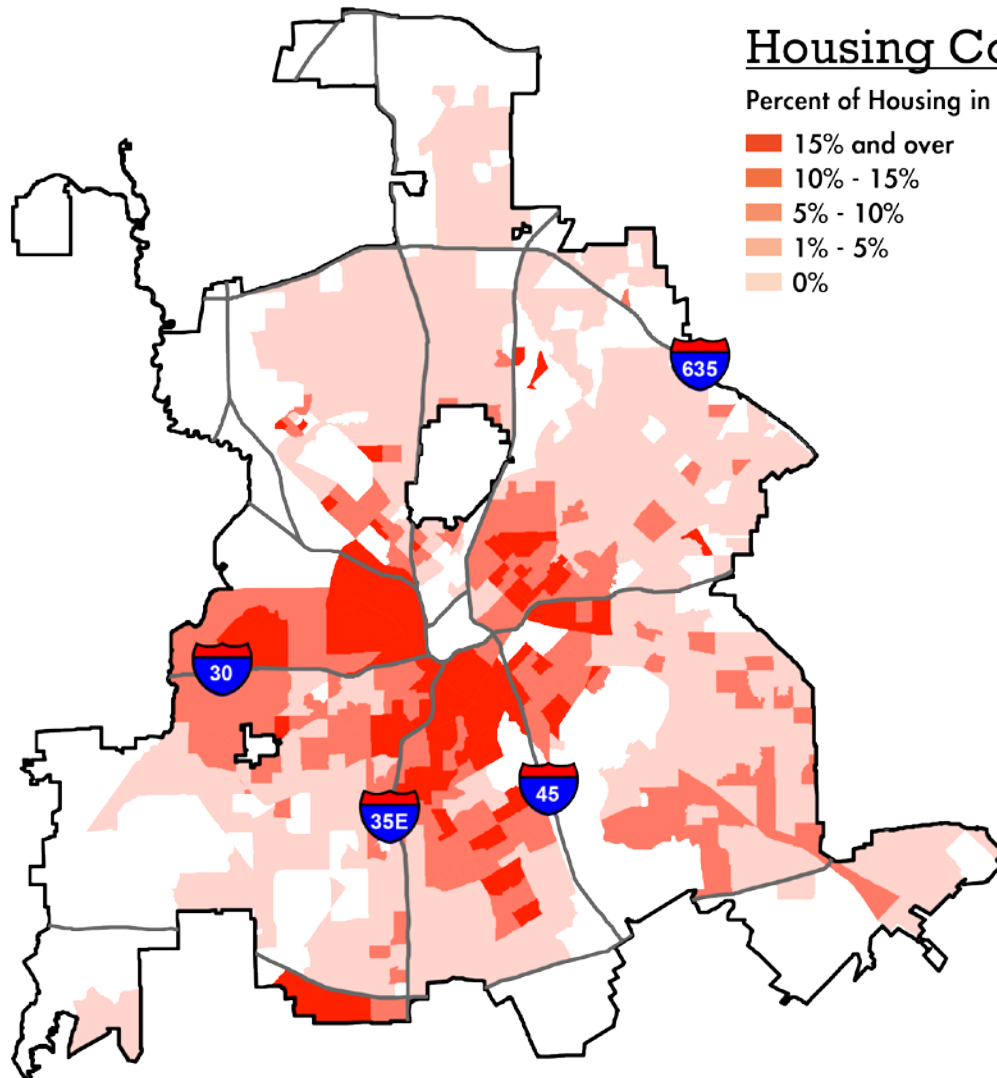
# Poverty in Dallas has reached crisis proportions

% Families below Poverty Line



Source: US Census Data (2000 Decennial Census and ACS 2008-2012 five year estimates) via Social Explorer T98/T179.

# Concentrated areas with high percentage of housing in poor condition



## Housing Conditions

Percent of Housing in Poor Condition

- 15% and over
- 10% - 15%
- 5% - 10%
- 1% - 5%
- 0%

\* Excludes blocks with fewer than 500 people per sq. mile.

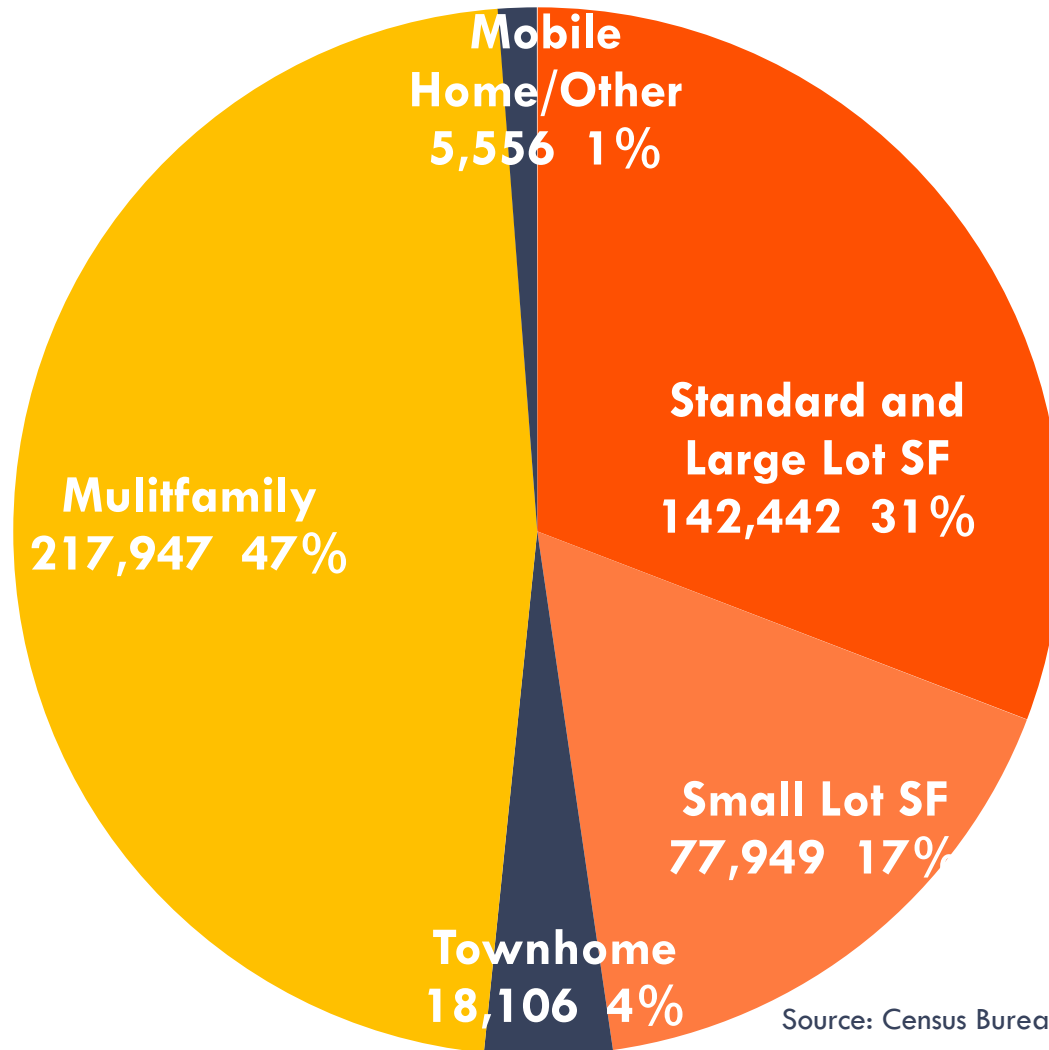
- A few landlords owning multiple properties account for a significant number of single family rental properties in poor condition.

# Does Dallas Offer Adequate Housing Choice?

- “Safety and security don’t just happen, they are the result of collective consensus and public investment” – Nelson Mandela

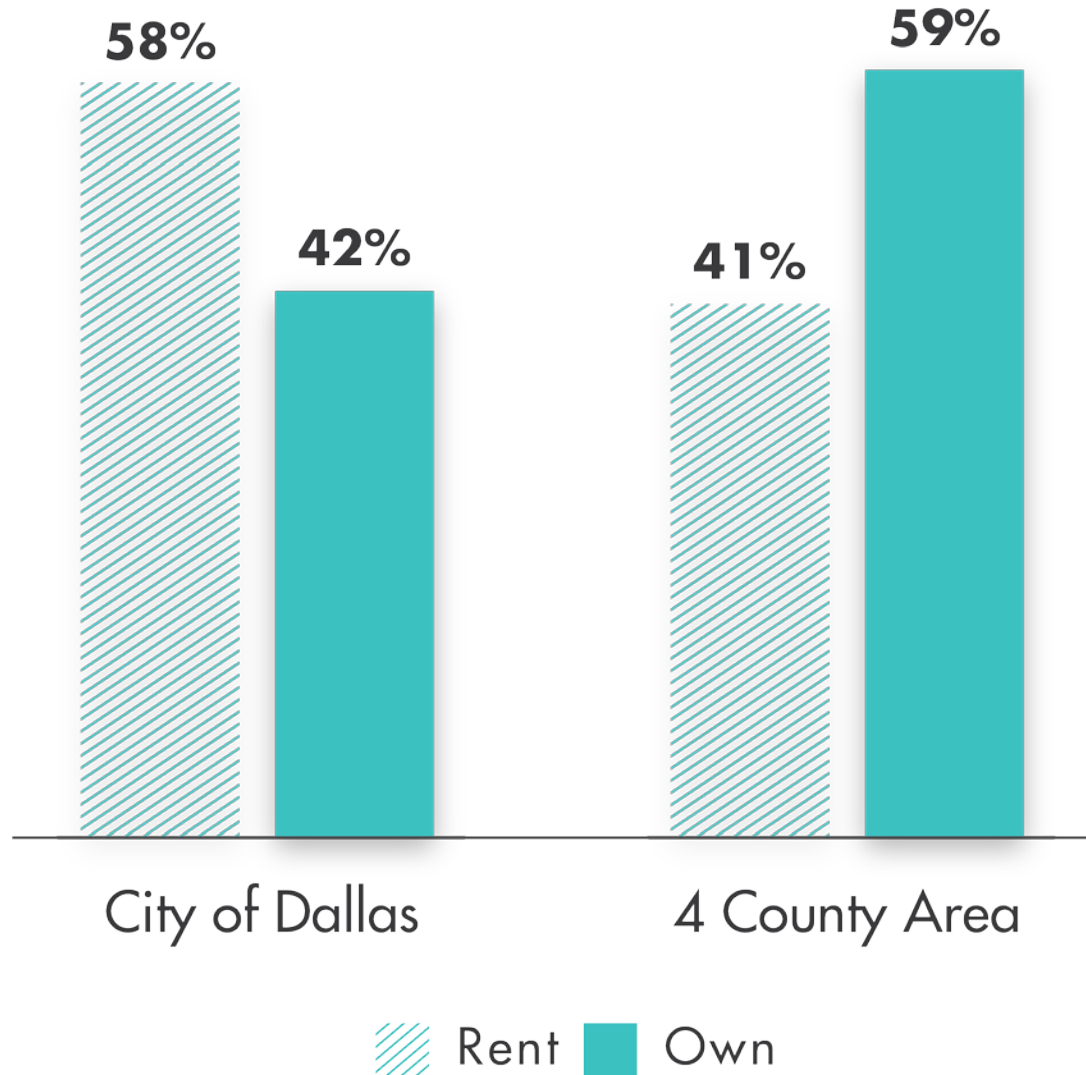
# What type of housing do we have today?

## Current Housing Stock, City of Dallas

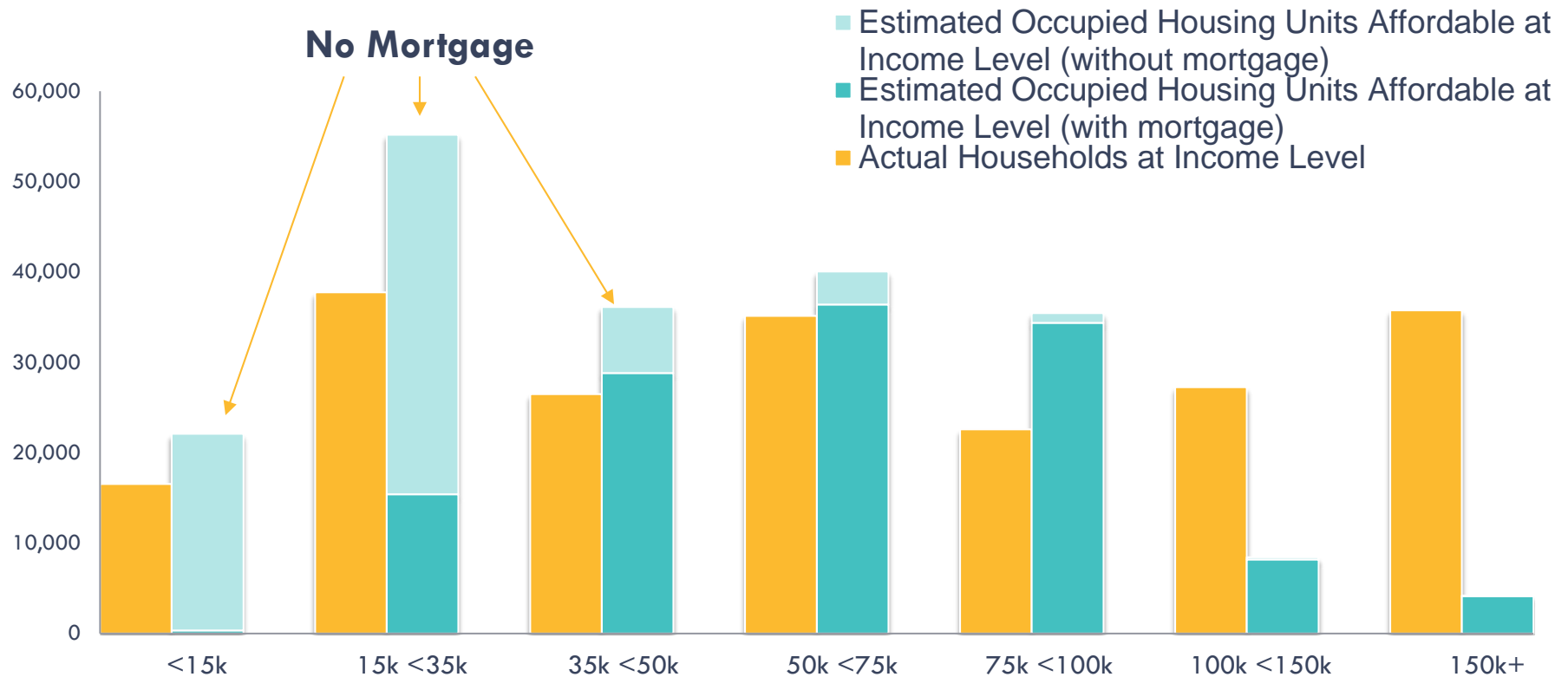


Source: Census Bureau, ACS 2009-2013 (5-year Estimate)

# Renters and Owners



# Comparing Owner Household Incomes with Occupied Units Affordable at Each Income Level

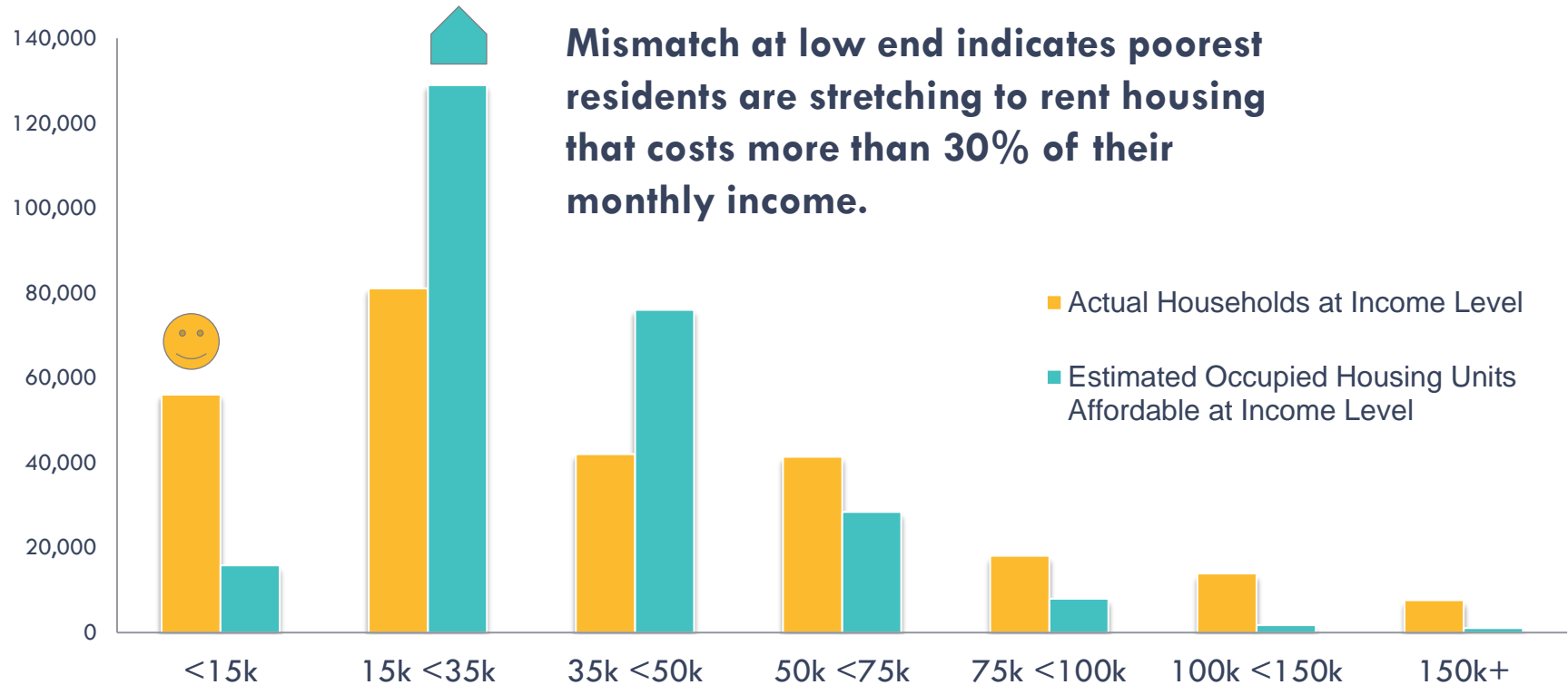


**Few homes are affordable at lower incomes levels, unless they are mortgage-free.**

**At highest incomes, households are less likely to pay a 30% of income on housing, so mismatch is less than it appears.**



# Comparing Rental Household Incomes with Occupied Units Affordable at Each Income Level

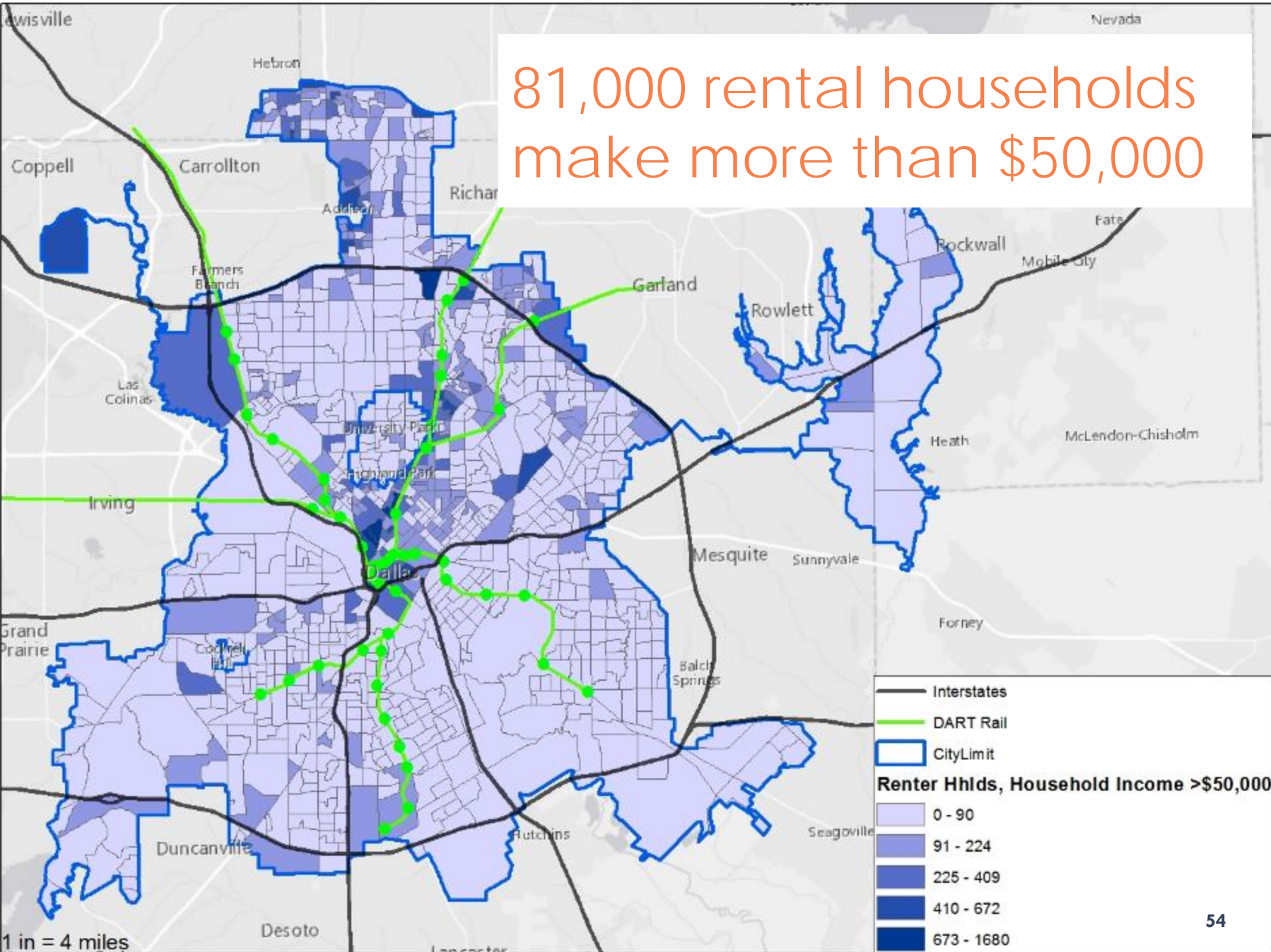


**More people than housing units affordable to them.**

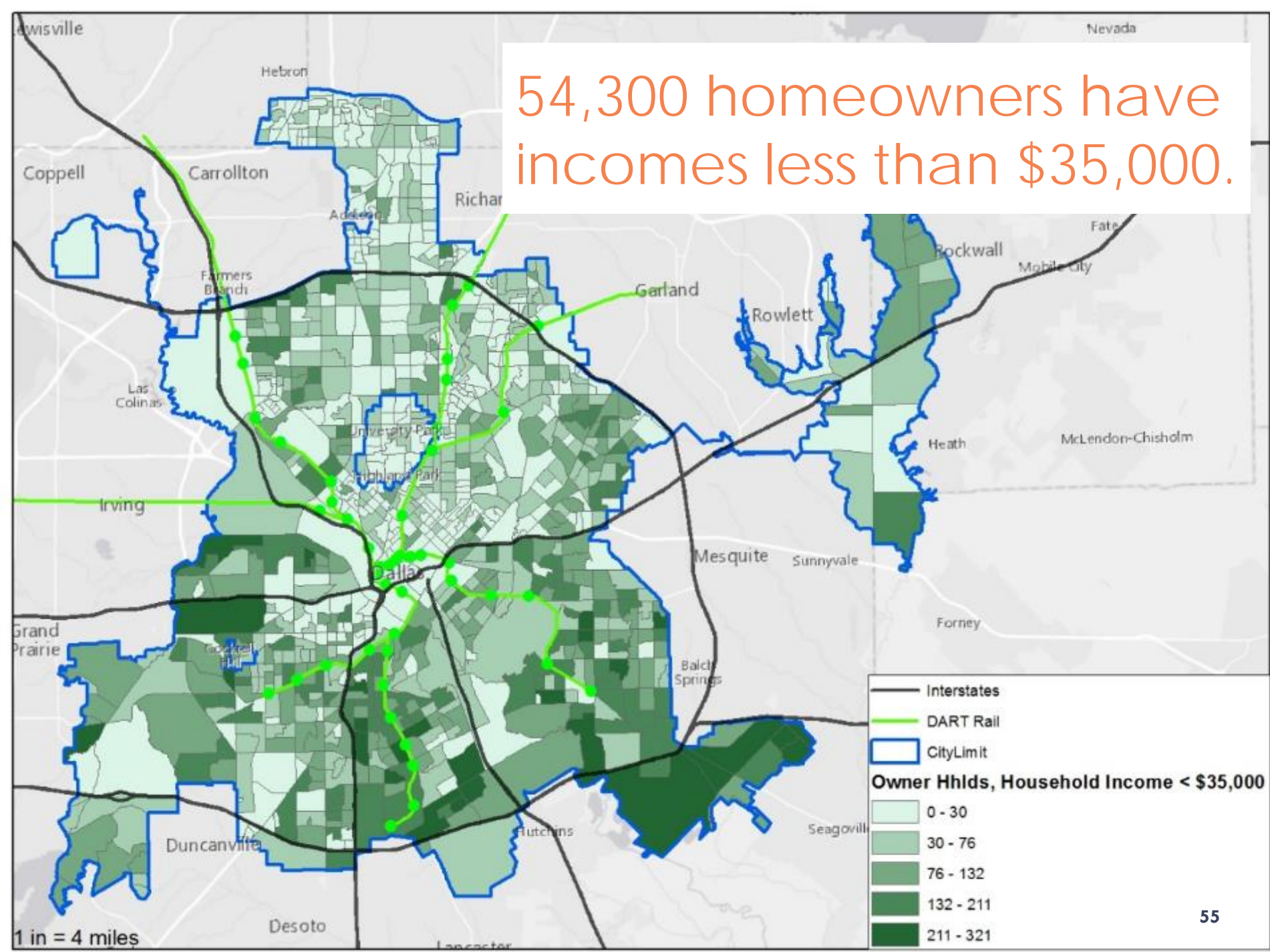
**More housing units affordable at this level than people earning this much.**

Source: Envision Tomorrow Balanced Housing Model; ACS 2009-2013.

81,000 rental households make more than \$50,000

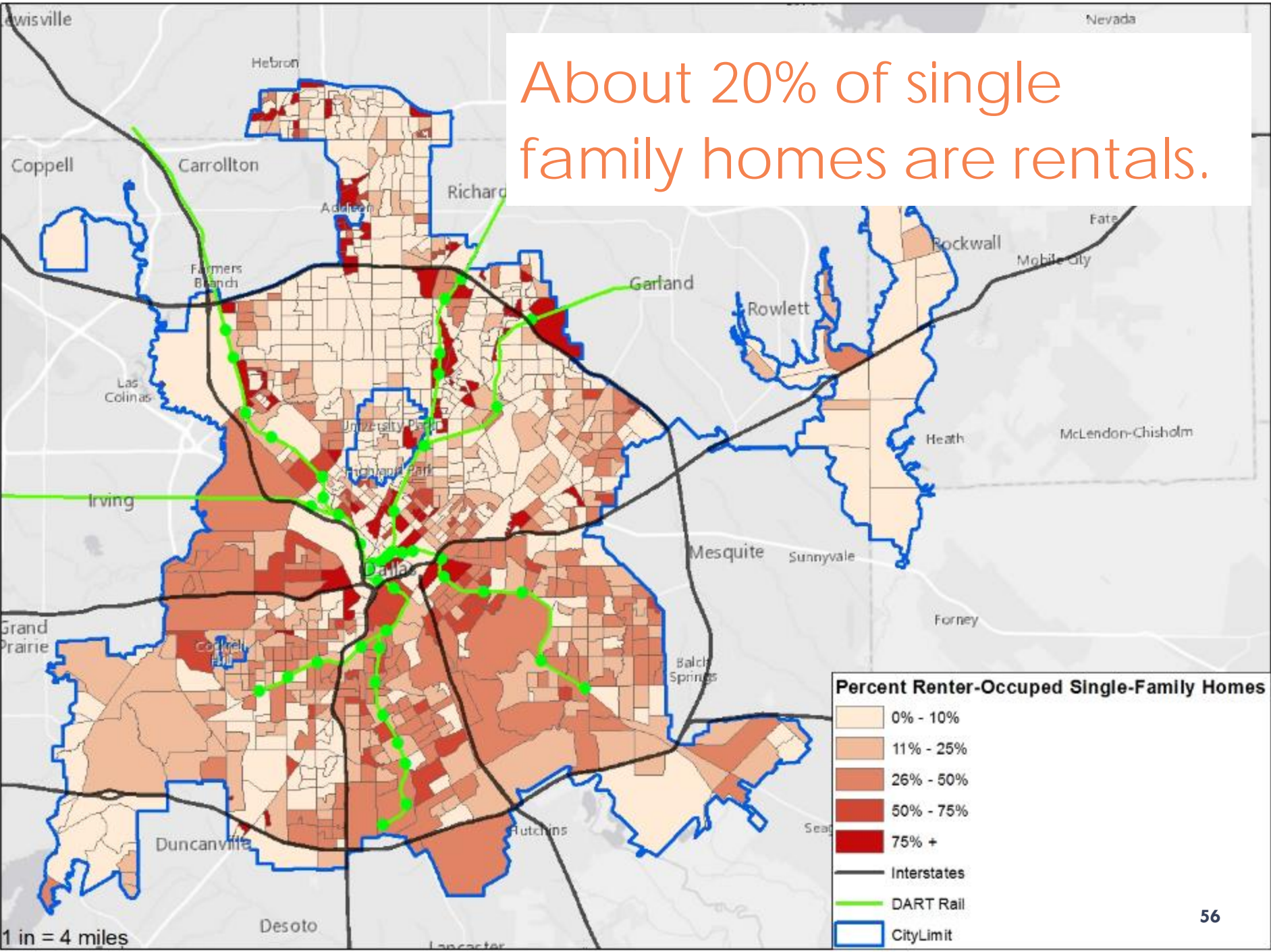


54,300 homeowners have incomes less than \$35,000.





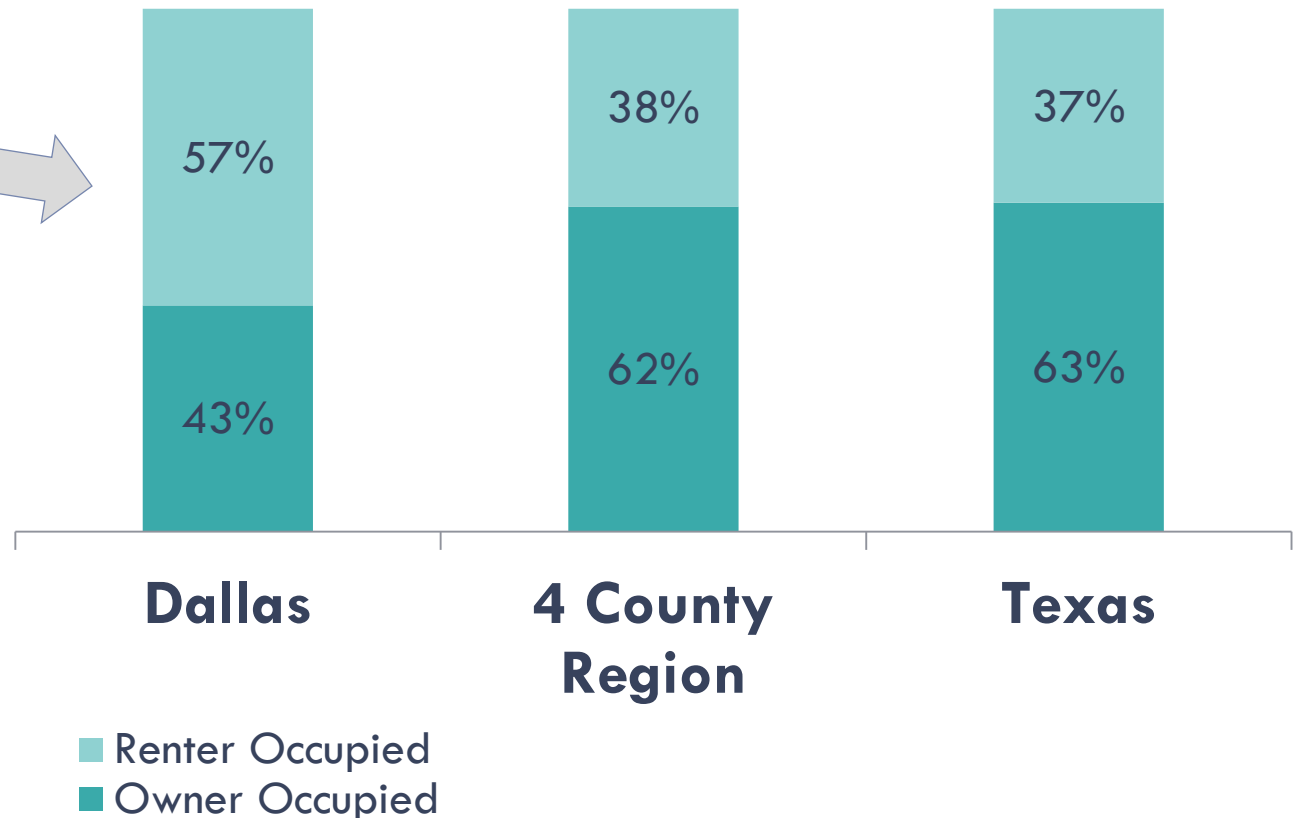
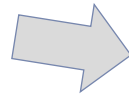
About 20% of single family homes are rentals.



# The majority of households with children are renting.

## Households with Children (2013)

57% of households with children are renting



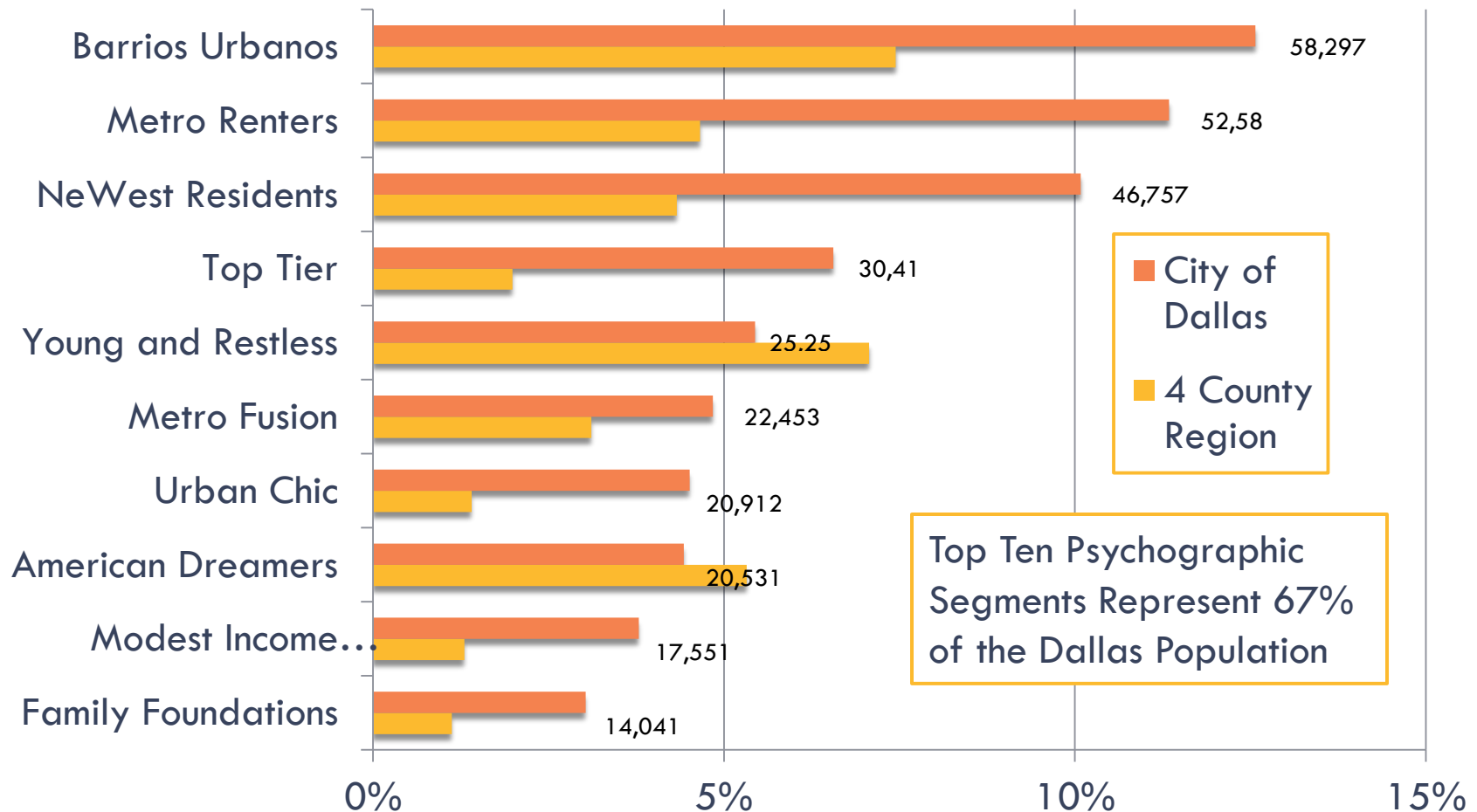
# Who Is Dallas Attracting?



## Psychographics

Combines demographics,  
socio-economics, preferences

## Top 10 Tapestry Segments



# Dominant Groups in Dallas

21%

## Young Diverse Families

Barrios Urbanos, NeWest Residents, Las Casas

16%

## Urban Loving Millennials

Metro Renter, Young & Restless, Laptop & Lattes

8%

## Dallas Baby Boomers

Top Tier, Savvy Suburbanites, Exurbanites

7%

## Hardworking Households

Family Foundations, Traditional Living, Modest Income Households

- ❖ Who are they and what do they like?
- ❖ Where do they live?
- ❖ What are the characteristics of these areas?

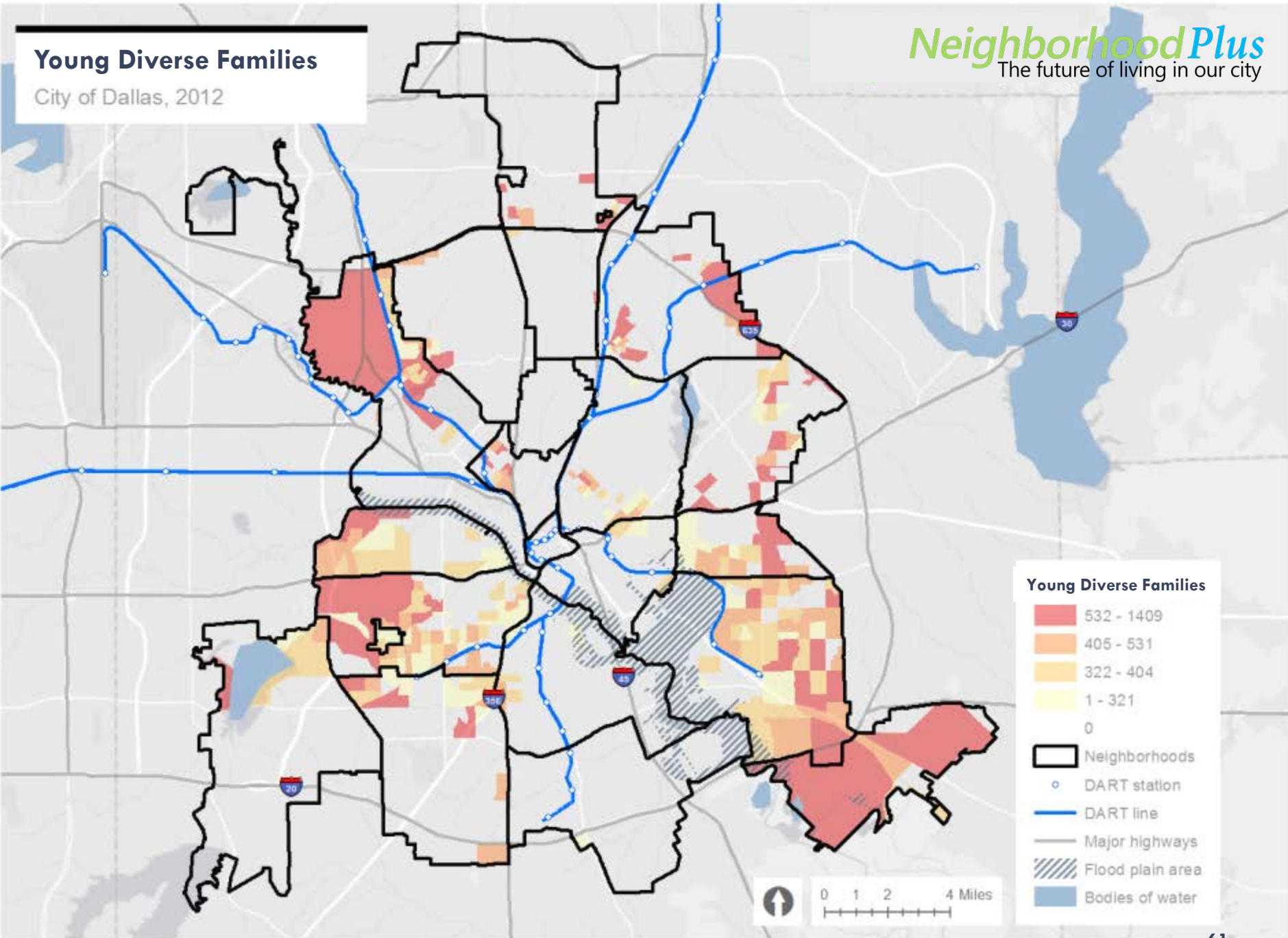
# Young Diverse Families

- Barrios Urbanos; NeWest Residents; Las Casas
  - 21% of City of Dallas (112,627 households in 2012)
- Families with kids, often multigenerational
- Younger families newer to the city live mostly in apartments
- Tend to prefer single family homes - some as renters
- Own cars but frequently carpool
- Love soccer, favor energy drinks, spend on diapers, furniture, magazines, keeping up personal style



# Young Diverse Families

City of Dallas, 2012



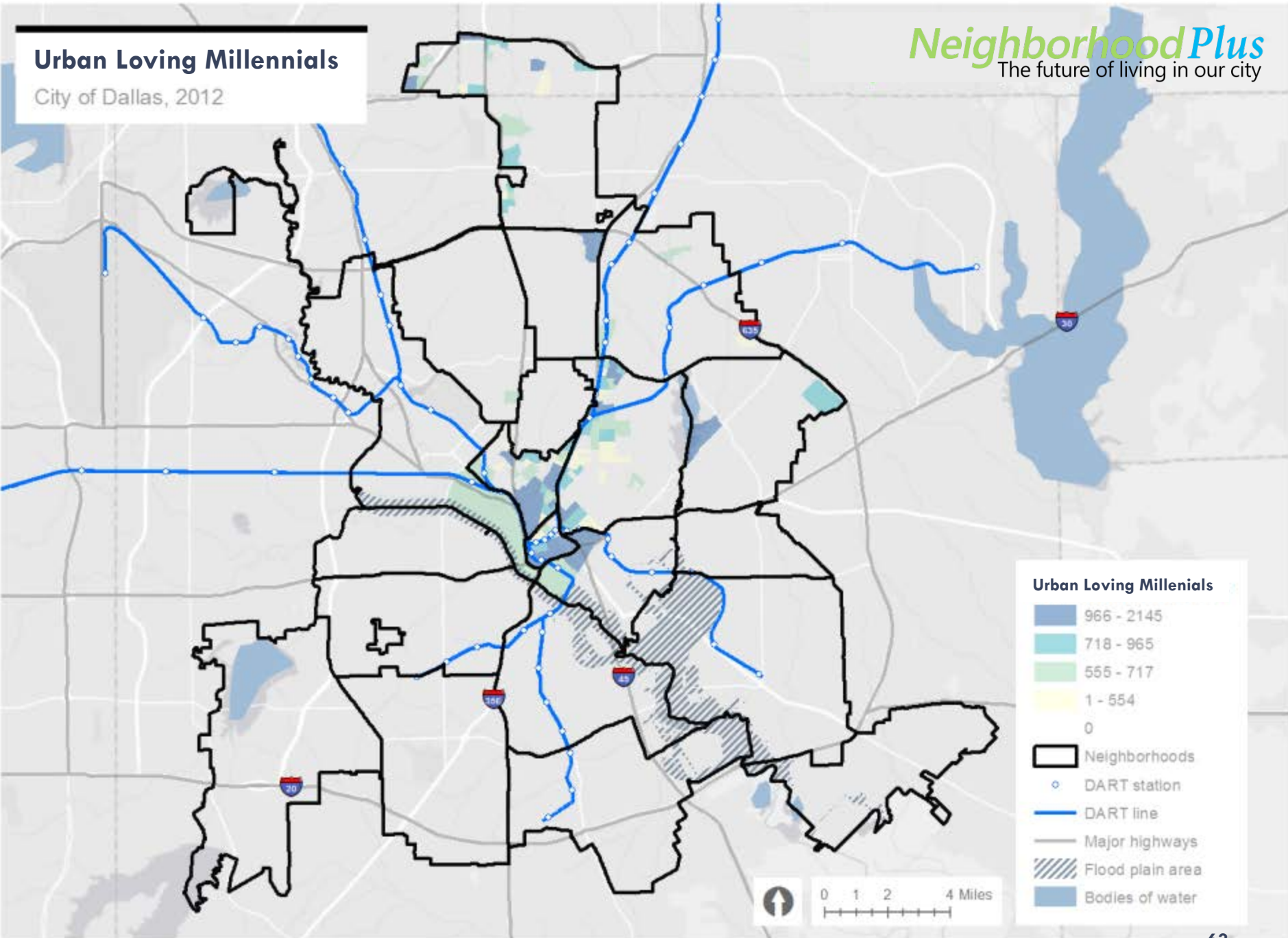
# Urban Loving Millennials

- Metro Renters; Young&Restless; Laptops&Lattes
  - 16% of City of Dallas ( 84,140 households in 2012)
- Singles - active online social networkers, quick to buy newest gadgets
- Renters - typically in large apartment complexes
- Well educated - with medium to well paying jobs
- Environmentally conscious - less likely to own a vehicle
- Shop at Trader Joe's and Whole Foods

# Urban Loving Millennials

City of Dallas, 2012

*NeighborhoodPlus*  
The future of living in our city



# Dallas Baby Boomers

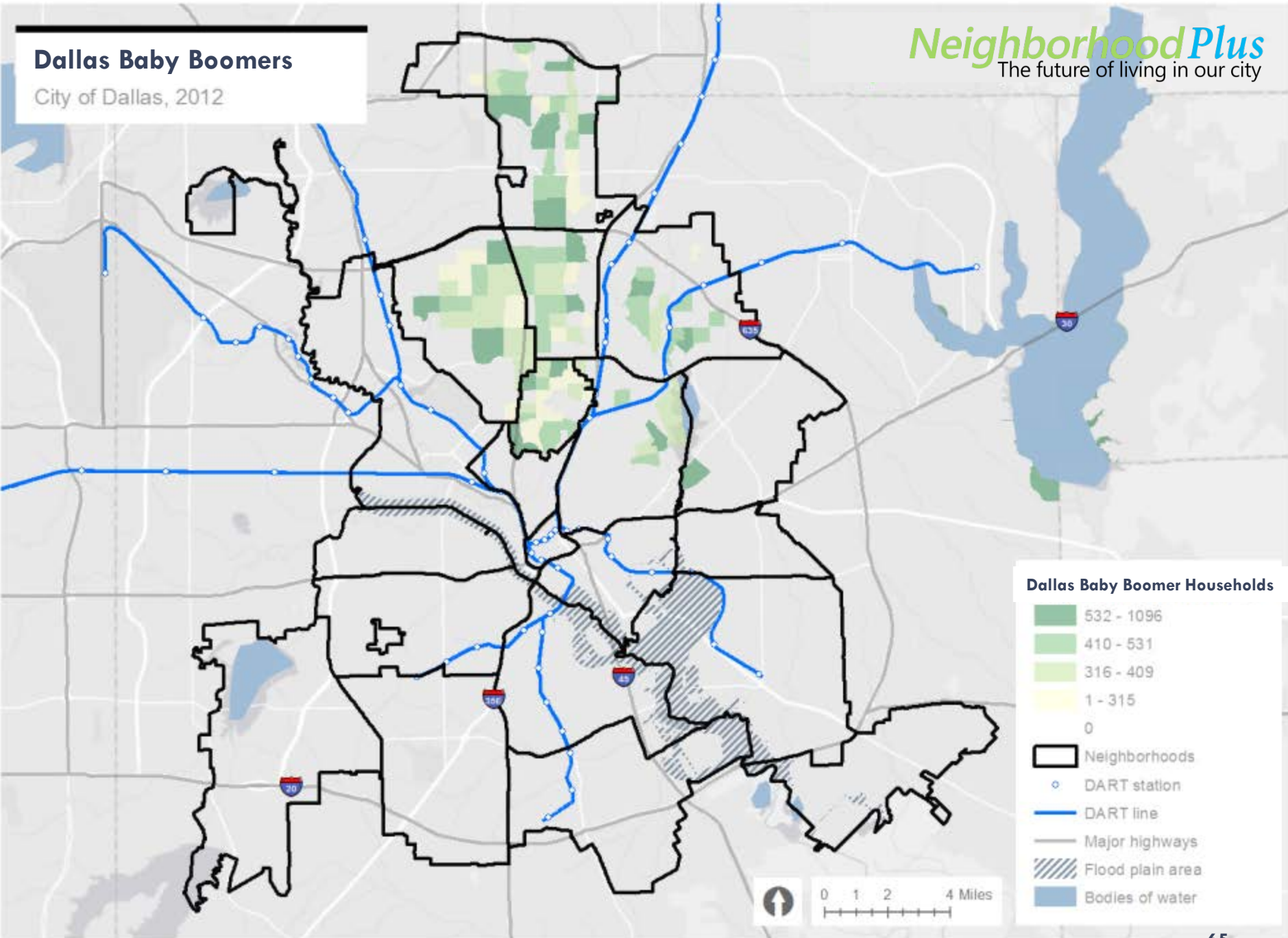
- Savvy Suburbanites, Top Tier, and Exurbanites
  - 8% of City of Dallas (44,512 households in 2012)
- Empty nesters who typically own high value single family homes
- Like gardening and DIY home improvements
- Stay active, buy organic food and luxury cars/SUVs
- Listen to WRR, shop on the internet and rack up airline miles



# Dallas Baby Boomers

City of Dallas, 2012

*NeighborhoodPlus*  
The future of living in our city



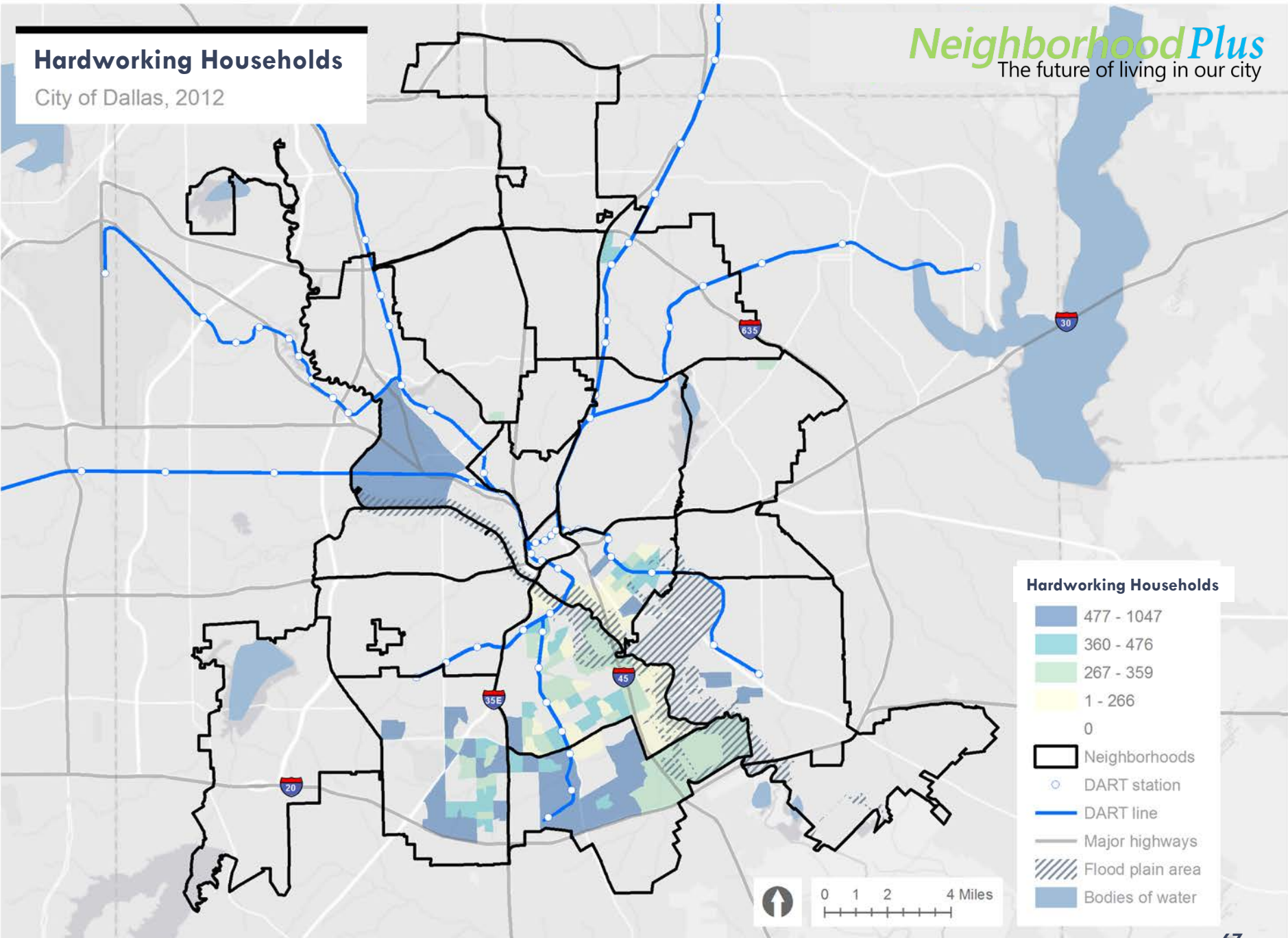
# Hard Working Households

- Family Foundations; Traditional Living; Modest Income Households
  - 7% of City of Dallas (36,269 households in 2012)
- Reside in modest single family homes or rental units
- Moderate education, lower paying jobs, higher unemployment, often receive social assistance
- Disproportionately older (45 & above); single parent households
- Despite lower incomes, still want to keep their family happy and content, value style and spending money on clothes, entertainment, and home furnishings

# Hardworking Households

City of Dallas, 2012

*NeighborhoodPlus*  
The future of living in our city



# Key Strategies for Change

- “If you are going to achieve excellence in big things, you develop the habit in little matters. Excellence is not an exception, it is a prevailing attitude.” – Colin Powell



# NeighborhoodPlus

The future of living in our city



**Alleviate  
Poverty**

**2**



**Fight  
Blight**

**3**



**Attract and  
Maintain  
the Middle  
Class**

**4**



**Expand  
Home-  
ownership**

**5**



**Enhance  
Rental  
Options**

**6**

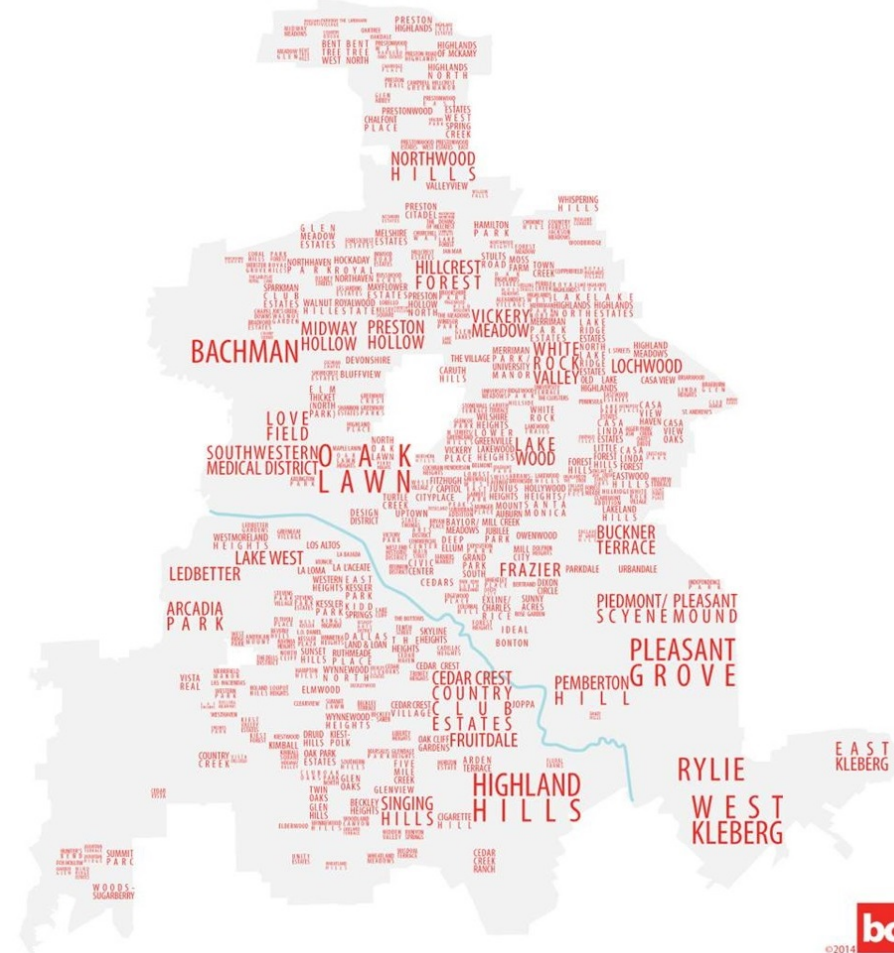
**1**

**COLLECTIVE IMPACT**

# Collective Impact – How We Get There

## STRATEGIES

- Collective Impact Compact
- Super-Neighborhood Organization Framework
- Targeted Resources for Neighborhood Improvement



# Alleviate Poverty – How We Get There

## STRATEGIES

- Increase earnings for existing low wage earners
- Target and expand workforce training
- Prioritize Pre-K education opportunities for children in poverty
- Partner with health care and other agencies to improve community health
- Transportation, childcare, and health programs for low income workers

# Prioritize Pre-K education opportunities for children in poverty

Support efforts to increase access to Pre-k education, promote parental engagement and provide opportunities for early learners outside the classroom.



“The question is not whether we can afford to invest in every child; it is whether we can afford not to.”  
Marian Wright Edelman



# Partnerships to improve community health



Parkland health center at Hatcher Station



St. Phillips Food Bank - Texas Food Bank



Fitness Zones - Trust for Public Land



Healthy Corner Store Initiative –  
Children at Risk; The Food Trust

# Fight Blight – How We Get There

## STRATEGIES

- Develop a unified blight removal and improvement program
- Create a comprehensive database of blighted properties
- Acquire and dispose of City-owned and land bank properties more strategically and efficiently
- Partner with health care agencies to address endemic health issues (eg: asthma) through rigorous code enforcement



# Create a unified blight removal and improvement program

Create a target area program to bring blighted properties into compliance through coordinated police and nuisance abatement team efforts.



# Attract and Retain the Middle Class – How We Get There

## STRATEGIES

- Brand Dallas to promote neighborhood assets and programs
- Support and coordinate with DISD, Charters, private and parochial schools to enhance school quality and school choice
- Create home improvement incentive programs for home-owners
- Make neighborhoods more desirable through improved infrastructure, recreation, and other amenities
- Eliminate barriers to neighborhood revitalization
- Develop a neighborhood infrastructure program to support infill and redevelopment



# Support and coordinate with DISD and Charters for school quality and school choice programs

**DESTINATION 2020**

INVESTING IN PEOPLE

Our goal is to improve teacher quality, build leadership capacity in the role of principal, and to develop a strong Central Office Team.

[LEARN MORE](#)

STAFF STUDENTS SYSTEMS STAKEHOLDERS



Coordinate locations for new Choice Schools with targeted neighborhood improvement and incentive programs.

# Home improvement incentive program

Provide **one-time incentive payments** to qualifying residents who make home improvements to encourage reinvestment in neighborhoods.





# Make neighborhoods more desirable through improved recreation and other amenities



Preston Ridge Trail

Make neighborhood improvement a key economic development priority through **targeted investments.**



Katy Trail



Salado park

# Expand Homeownership – How We Get There

## PROGRAMS

- Expand homeownership by increasing infill housing development
- Encourage a wider range of housing types to meet emerging preferences
- Develop private sector partnerships to fill the gap for housing options up to \$200K
- Expand mortgage assistance programs to reach a broader range of potential homebuyers
- Increase the number of eligible loan applicants



# Encourage a wider range of housing types to meet emerging preferences



Cottage Homes, Courtyard Housing, Smaller Mixed Use, Duplexes 81

# Develop private sector partnerships to fill gap for housing options up to \$200K



## **Pilot/Demonstration Program:**

Affordable Street of Dreams program that builds quality, affordable homes in a transitioning neighborhood, using city-owned or land bank properties.

# Expand mortgage assistance programs to reach a broader range of potential homebuyers



- **Expand affordable housing mortgage assistance options** offered by the banks, City, local and State entities.





# Enhance Rental Housing Options – How We Get There

## STRATEGIES

- Strengthen and expand rental registration and inspection programs for multi-tenant, single family and condominium rental housing
- Improve design standards for multifamily development
- Require affordable housing in projects receiving public funds or other city entitlements
- Create joint TOD program to align planning, funding, and community investments with transit and transportation planning
- Create TOD partnerships with DART, DHA for mixed income development



# Improve design standards for multifamily development

Encourage developers to create community amenities



# Require affordable housing in projects receiving public funds or other city entitlements

**Prioritize mixed income projects** by leveraging investment and strengthening policies that require projects receiving public funds to provide at least 20% of affordable units.

