

Reimagine MARSHALLTOWN ✓

COMPREHENSIVE PLAN

HOUSING STUDY



MARSHALLTOWN
MORE THAN EVER



AGENDA

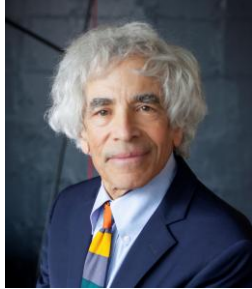
- Introductions
- Committee Role
- Schedule Overview
- Process Overview
- Emerging Input and Trends

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MARSHALLTOWN

INTRODUCTIONS



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Planner + Economist



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Lead Land Use + Mobility



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Urban Planner + GIS +
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Environmental Group**
Project Manager + Planner



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Environmental Group**

Committee members

- Kendra Sorenson – United Way Director
- Melisa Fonseca – Realtor & City Councilor
- Jim Johnson – Owner of JBI Properties
- John Hall – Chamber of Commerce
- Brad Comstock – JBS HR Director
- Jill Wellman – Emerson HR
- Andrea Jordan – Farmer's Savings Bank

What do you see as Marshalltown's most significant housing priority?

What communities does Marshalltown compare to?

INTRODUCTIONS

What is a Comprehensive Plan?

- A guide for development policy
- A context for making key land use and public investment decisions
- A vision for the city's future
- A tool to guide city priorities and directions, including capital improvement programming
- A strategic document that is adapted to the specific needs and hopes of the city

Marshalltown Comprehensive Plan 2030

NOVEMBER, 2012

Connect
Renew
Design



MARSHALLTOWN
DOWNTOWN MASTER PLAN

IA HIGHWAY 14 CORRIDOR STUDY

CITY OF MARSHALLTOWN, IOWA

MAY 2018

INTRODUCTIONS

What is a Housing Study?

- Give policy makers and housing developers a **guidebook** and a **toolkit** to ensure a healthy and functioning housing market that offers safe, affordable housing to all residents.
- Make specific **policy and program recommendations** to address issues and challenges facing the housing market.
- Create a **private market response** to housing needs.

Housing Market Assessment

City of Marshalltown
Marshall County, Iowa



Marshall County Courthouse, Downtown Marshalltown



MARKET STUDY AND STRATEGIES
2015



AGENDA

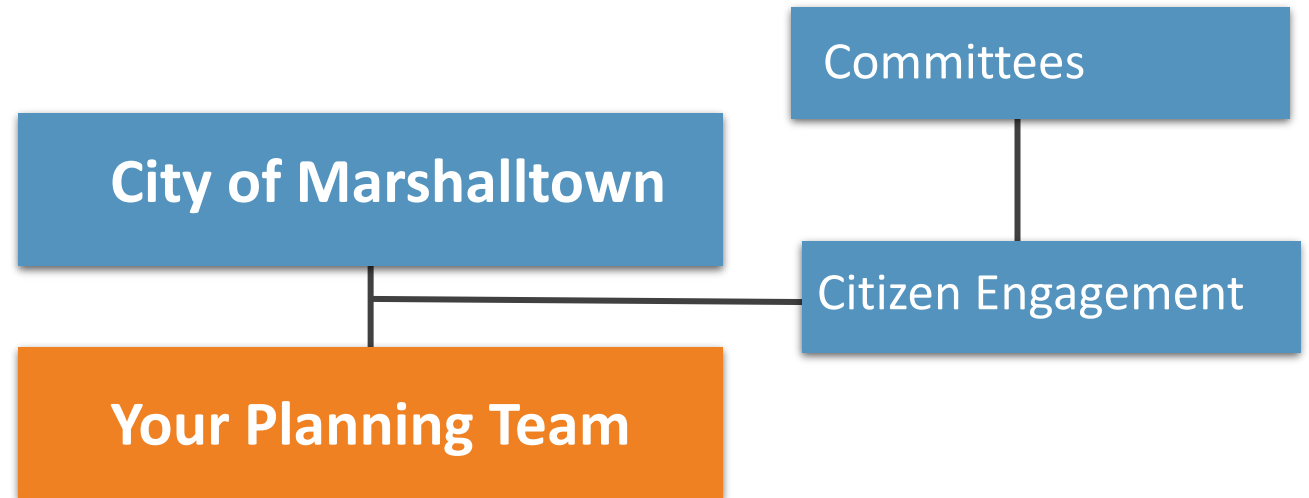
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COMMITTEE ROLE

Housing Committee

- Meets at strategic milestones
- Provide direction & mid-course correction
- Review deliverables
- Champion plan implementation



AGENDA

- Introductions
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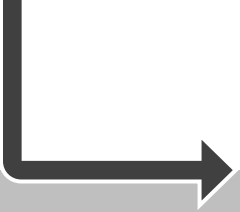
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- **Process Overview**
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PROCESS

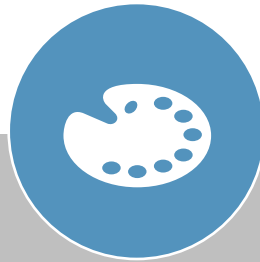
Project Launch



Engagement



*Today:
Collect and
Analyze Data*



*Tomorrow:
Land Use & Special
Area Concepts*



*Tomorrow:
Plan Elements*



Implementation



Approval

PROCESS > ENGAGEMENT



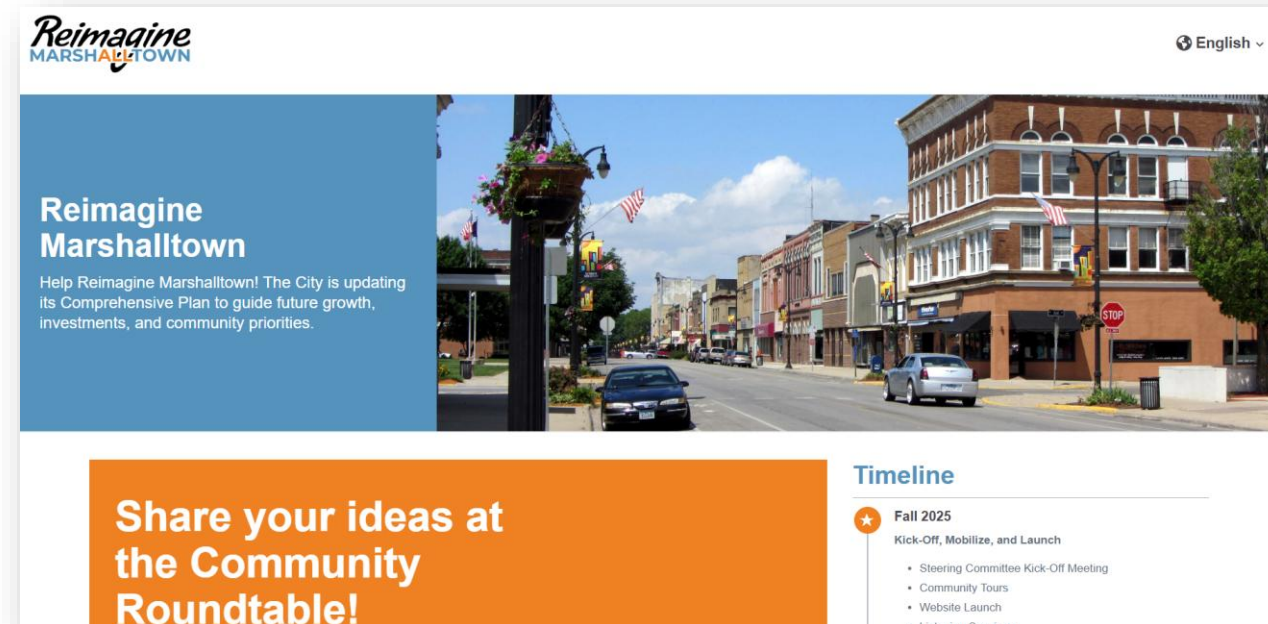
Project Website

- Anytime access
- Interactive mapping
- Social media campaign
- Regular polling questions

Planned Engagements

- Regular Committee meetings
- Stakeholder listening sessions
- Polls
- **Housing surveys**
- Community events
- Community roundtable and open house
- Committee Land Use Studio
- Community Design Workshop
- Implementation Workshop
- City Council and Planning & Zoning Commission Presentations

ReimagineMarshalltown.com



PROCESS > ENGAGEMENT



Community Housing Survey

- Gathers resident housing preferences and barriers
 - Current housing situation
 - Housing affordability
 - Quality and condition
 - Amenities and services
 - Future housing needs

Landlord Survey

- Collects market condition insights
 - Number and type of units
 - Price point by type of unit or bedrooms
 - Utilities included in the rent
 - Number of vacant units by type
 - Average tenure of residents
 - Average time to fill a unit
 - Number of income qualifying units and/or acceptance of Section 8
 - If senior oriented, services that may be provided

Workforce Survey

- Assesses housing related barriers to recruitment and retention
 - Employees' desired living location
 - What they pay for housing
 - Current income to assess what they can afford
 - If they are over 55, the type of housing they would like in retirement.

PROCESS > TODAY

Data Collection

- Historic population trends
- Age distribution
- Income
- Unemployment
- Population forecasts
- Housing trends and demand
- Assessing workforce housing demand
- Others...

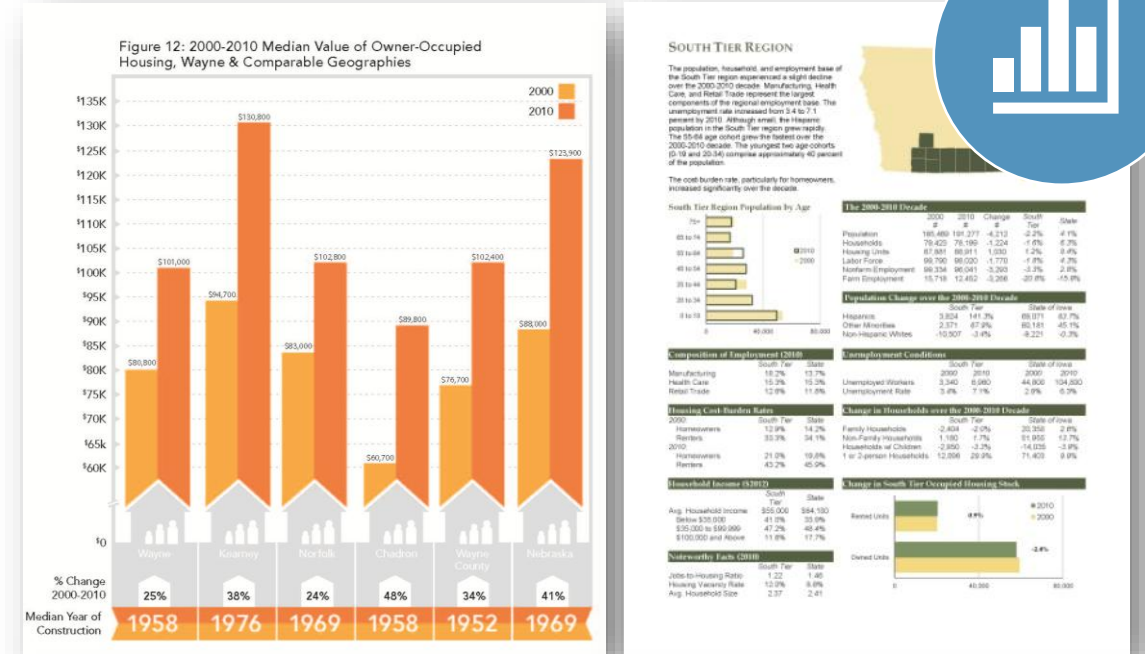
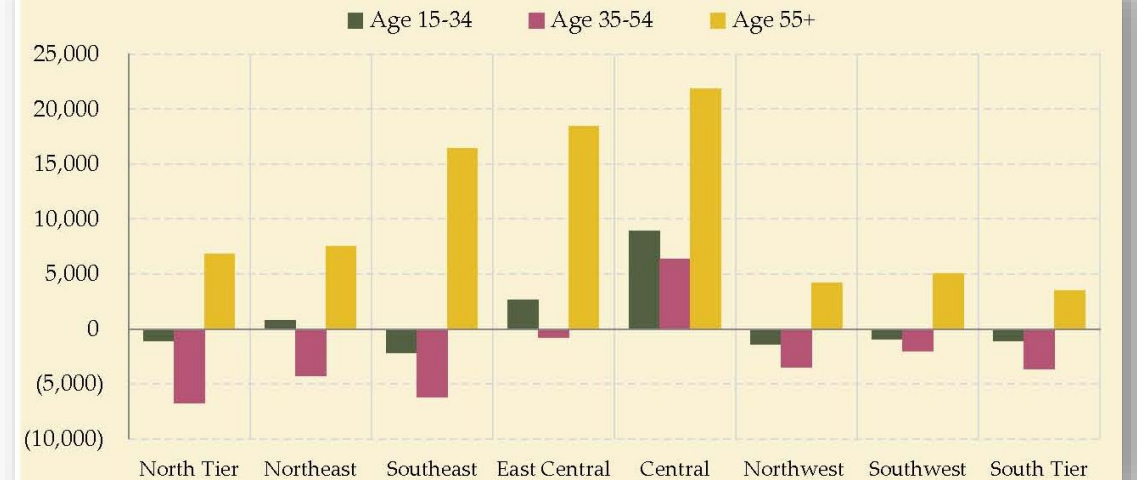


Figure I-8: Change in households by age of householder, 2000 to 2010

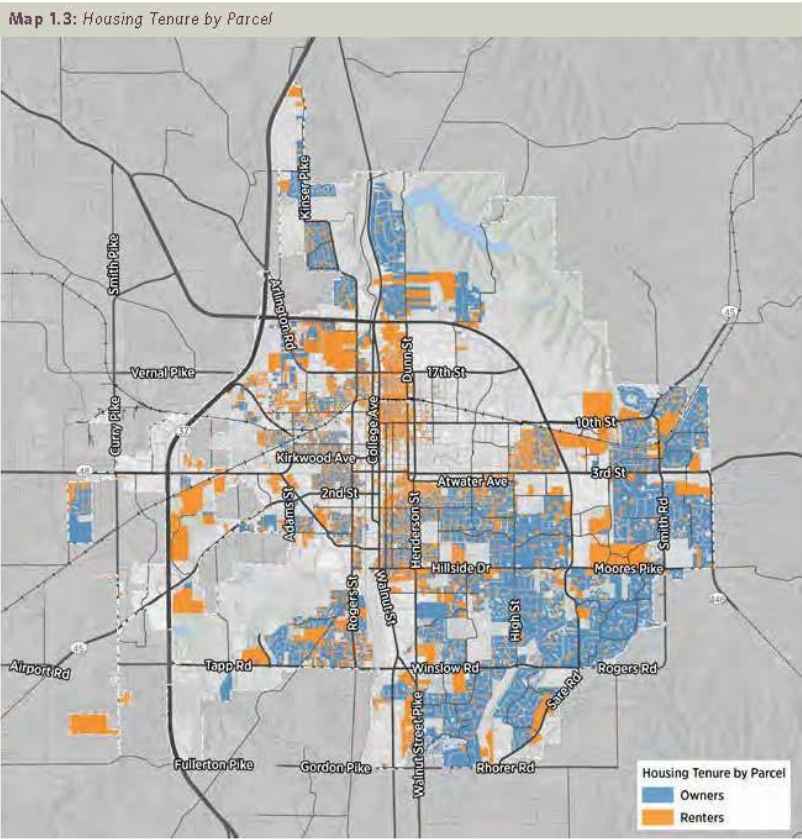


PROCESS > TODAY

Local Area Analysis

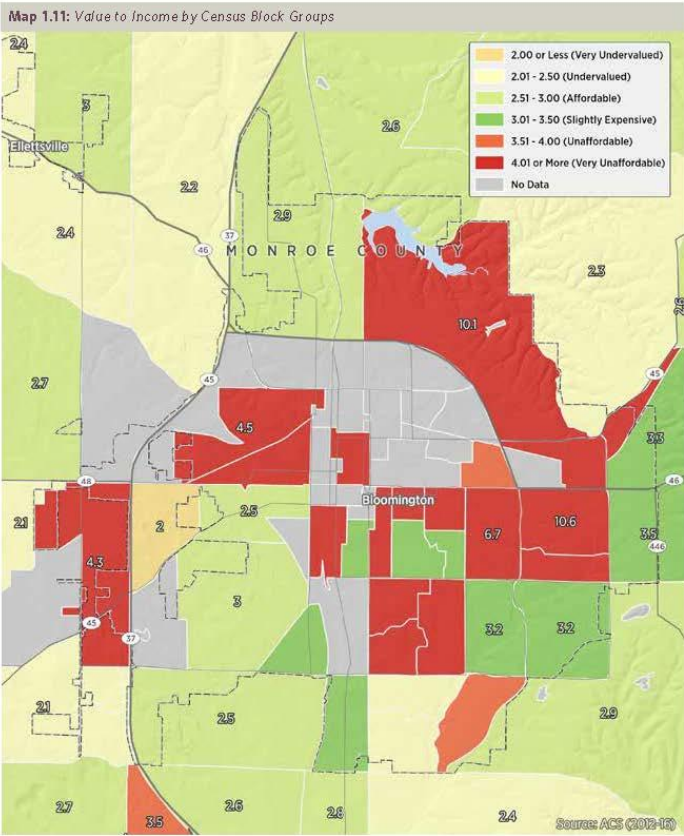


CHAPTER ONE: BLOOMINGTON TODAY



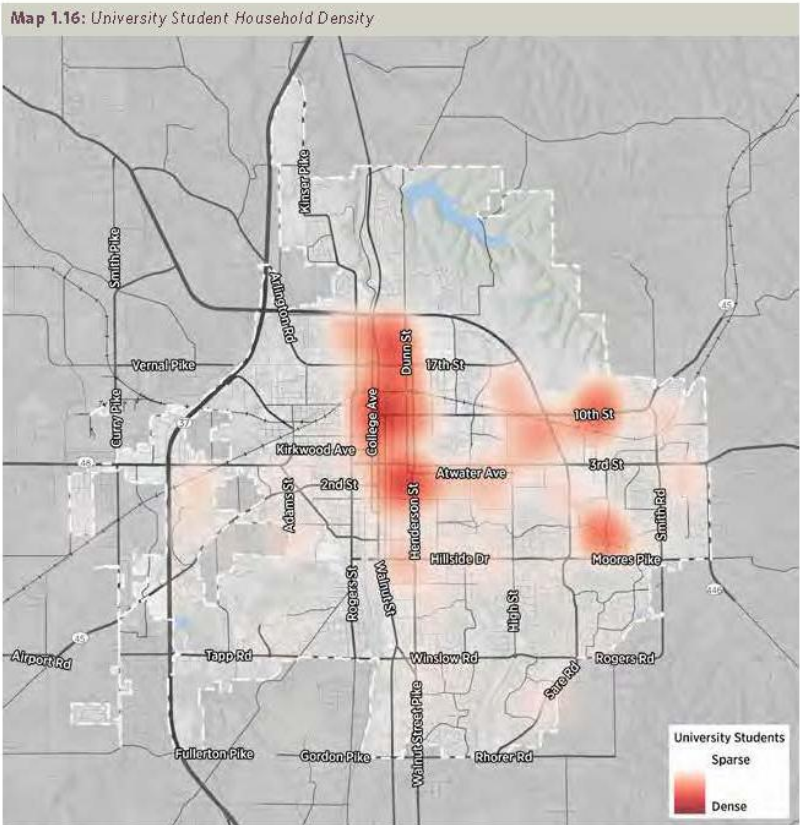
Source: 2020 Monroe County & RDG Planning & Design

CHAPTER ONE: BLOOMINGTON TODAY



Source: ACS (2010-12)

CHAPTER ONE: BLOOMINGTON TODAY

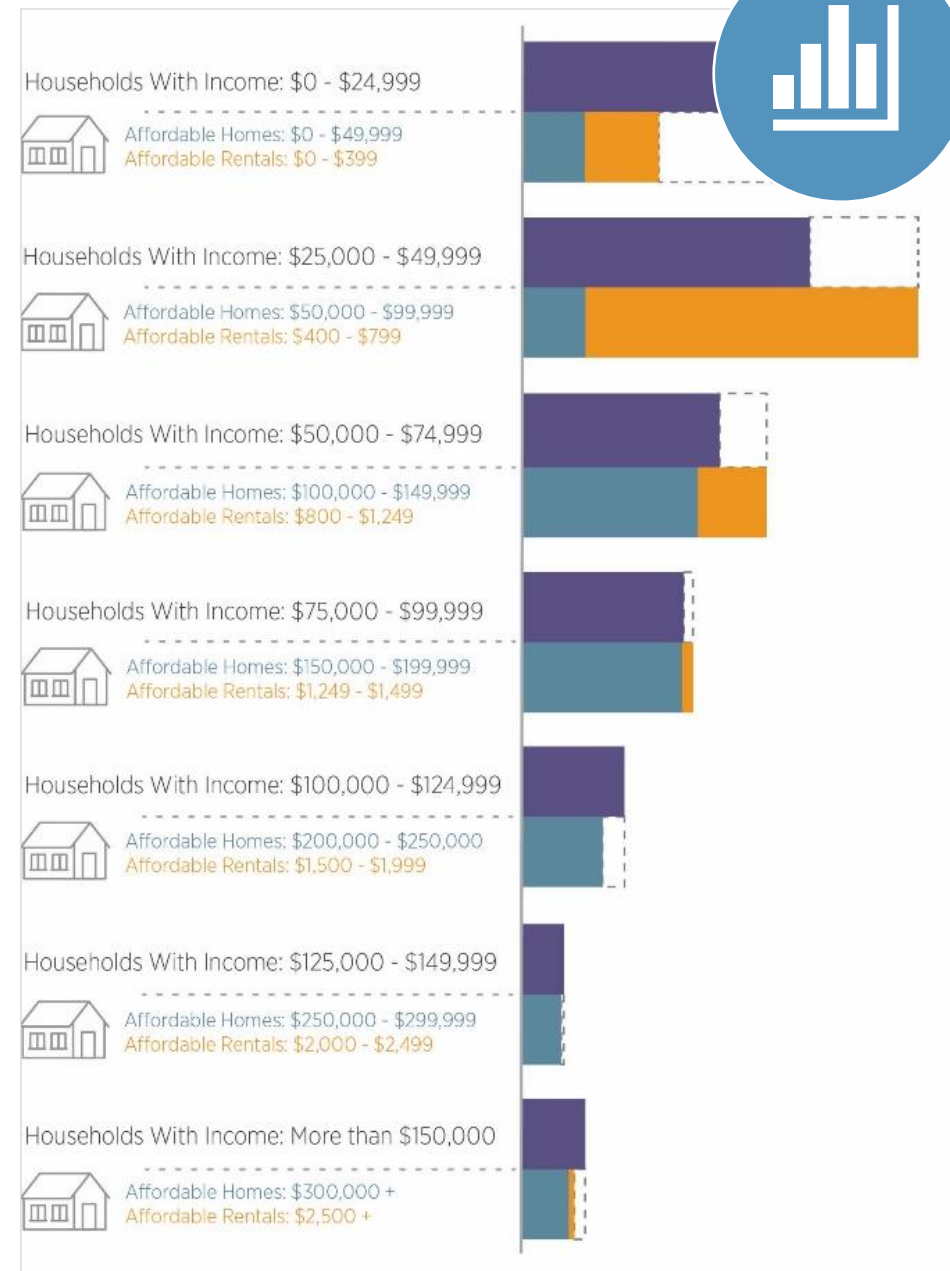
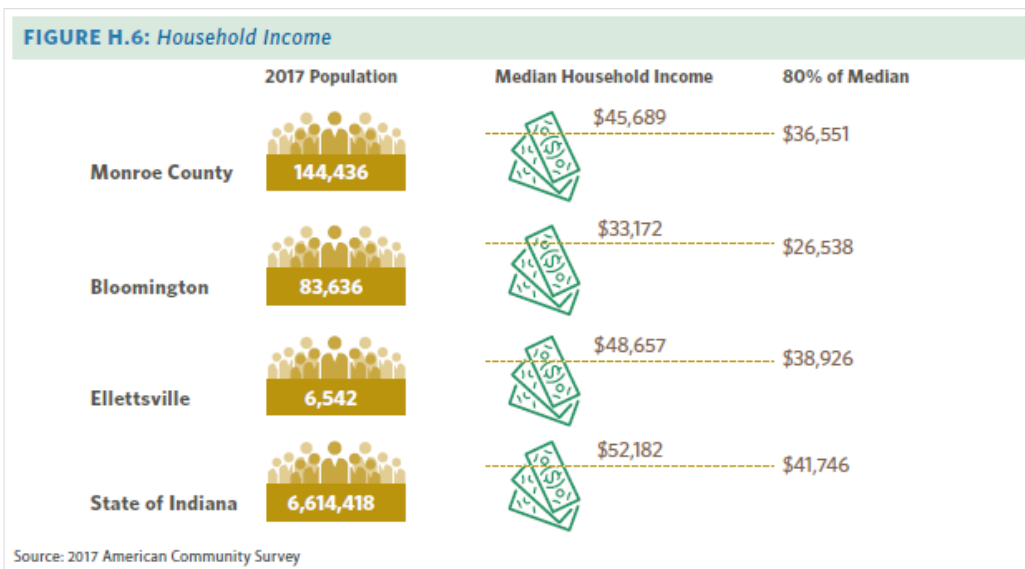


Density is calculated using a formula within ARCGIS but generally the "Dense" areas are approximately 350+ students and the "sparse" are approximately 15 students.

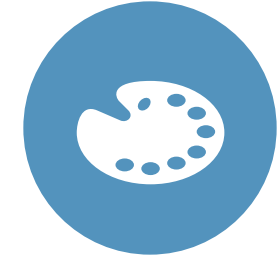
PROCESS > TODAY

Affordability Analysis

- Need by price point
- Comparison with other cities



PROCESS > TOMORROW



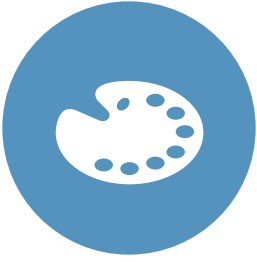
Identify Opportunities

- Demand by Number and Cost:
 - Population forecast
 - Recent construction activity
 - Assumptions: vacancy changes, population/hh, hh population, replacement need, condition

	2020 Base	2025	2030
Household Demand	19,193	19,960	20,400
Vacancy Rate	6.2%*	6.2%	6.2%
Unit Needs for 5 Year Period	20,490	21,454	22,079
Replacement Need for 5 Year Period		75	75
Total Need with Replacement	20,490	21,354	21,823
Cumulative Need for Period		864	469
Average Annual Production Need		173	94
Owner Occupied Units		432	281
Average Annual Owner Units		86	56
Rental Units		432	188
Average Annual Rental Units		86	38

	2021-2025	2026-2030	Total
Ownership Units	432	281	713
<\$225,000	172	112	284
\$225,000-300,000	107	70	177
\$300,000-400,000	106	69	175
>\$400,000	47	31	78
Rental Units	432	188	621
Under \$625	177	76	253
\$625-1,000	151	66	217
\$1,000-1,500	64	28	92
>\$1,500	40	18	58

PROCESS > TOMORROW



Identify Opportunities

- Demand by Product Type
 - Distribution by Type of Construction
 - Accounts for Changing Market Preferences
 - Relates to risk, neighborhood characteristics, and housing policy directions
 - “Missing Middle”



Conventional Single-Family



Small-Lot Single Family



Single-Family Attached



Low-Density Townhomes



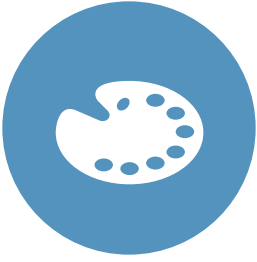
High-Density Townhomes



Multifamily



PROCESS > TOMORROW



Subarea Concept Diagrams

- Downtown Fringe
- JBS Campus Fringe
- 3rd Ave Corridor (South of Viaduct to River)
- W Merle Hibbs Blvd extension & neighborhood (Village Coop west to S 12th St)
- E Merle Hibbs Blvd extension & neighborhood (McFarland Clinic east to Governor Rd)
- Meadow Lane Mall property (Center St and Olive St)
- Iowa Avenue (Parker Ave to 18th Ave)
- Old Hospital Site – *Detailed concept drawing*

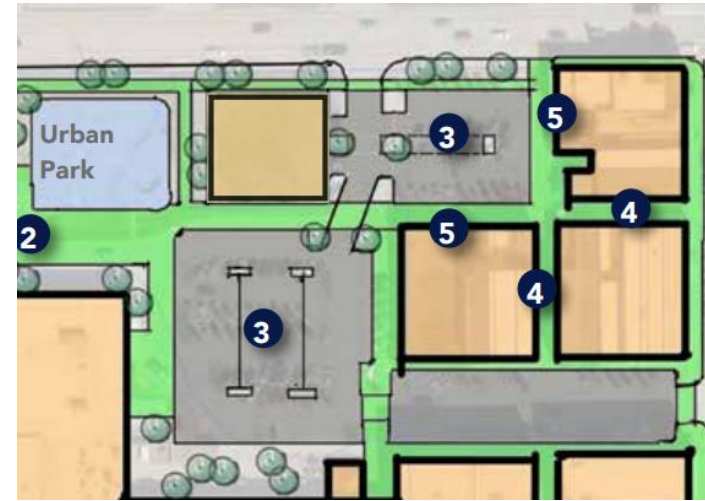


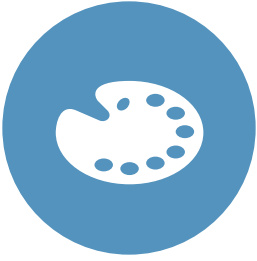
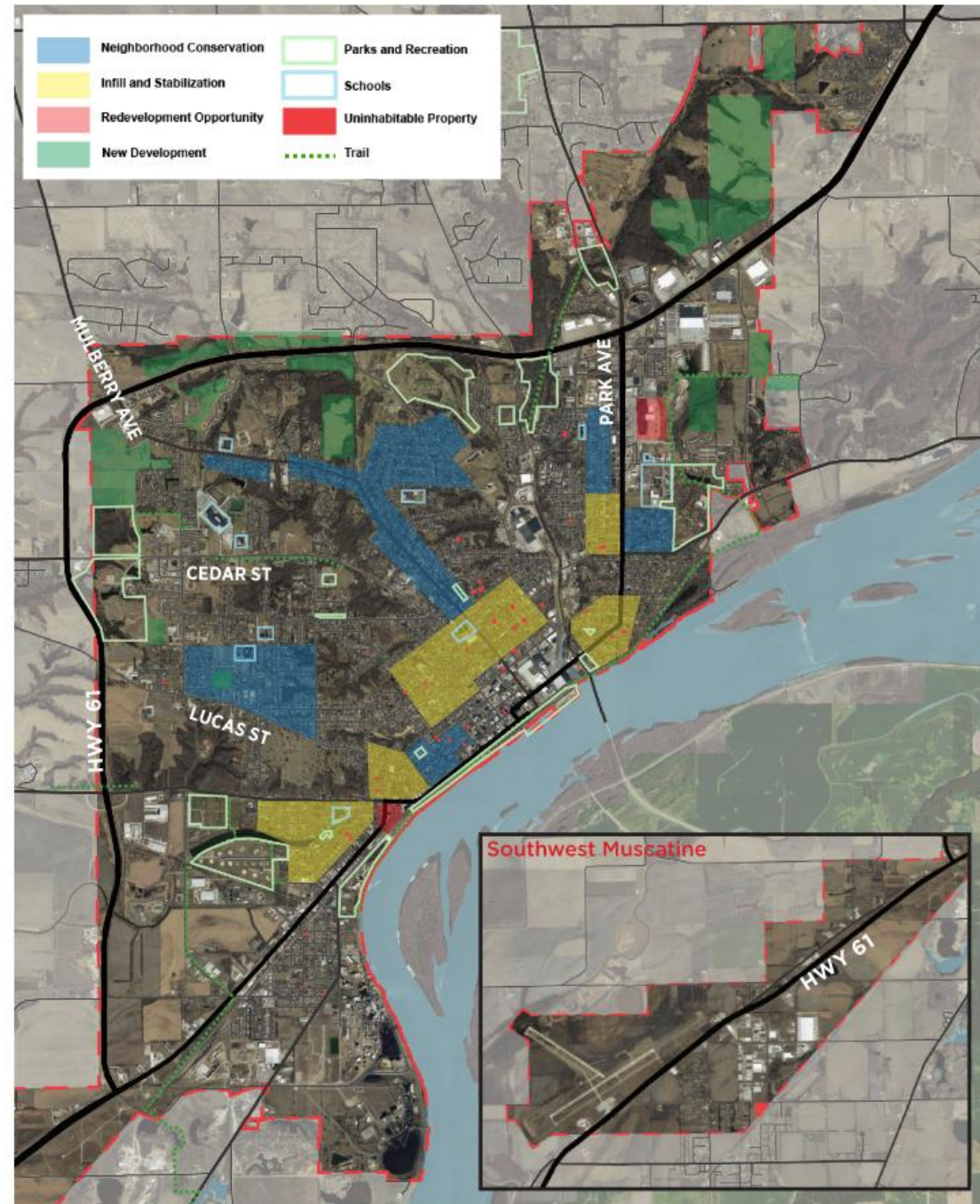
FIGURE 3.4.2: Infill Development Opportunities



PROCESS > TOMORROW

Housing Opportunity Maps

Map 4.1: Opportunities Map

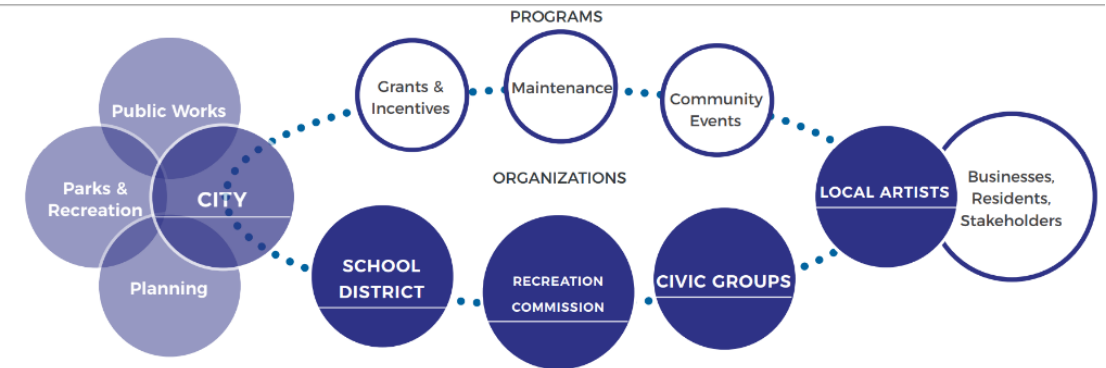


PROCESS > IMPLEMENTATION



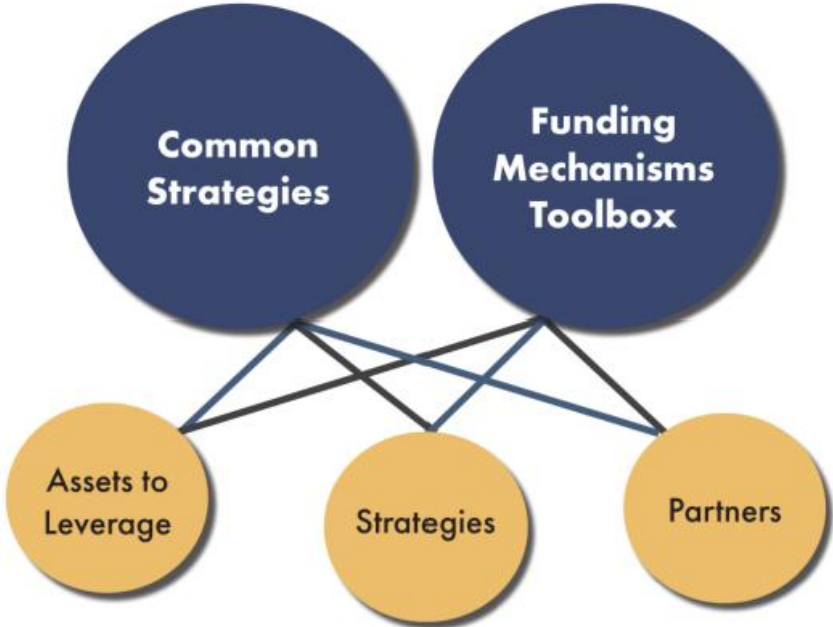
Implementation Workshop

- Next Steps for Implementation
- Establish Criteria
- Phasing and Milestones
- Discuss Partnerships



PROCESS > IMPLEMENTATION

Policy and Priorities



CROSS ALL	MOST APPLICABLE AREAS	TARGET PRODUCT	TARGET PRICE POINT
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	All counties and regional partnerships - different funds for Tippecanoe and rest of counties	Small lot, attached, mixed-use	Low to medium
\$	All counties	N/A	N/A
	Tippecanoe, Carroll, White (areas with more development activity)	New products, "missing middle"	Low to medium
	All counties and regional partnerships	N/A	N/A

SECTION THREE: A PATH FORWARD

Property maintenance codes and enforcement.
Property maintenance codes received high support in the community survey. People understand that poor property maintenance often leads to dilapidated homes and a decrease in surrounding property values. Communities should share resources to develop necessary codes and fund staff to enforce these codes across the communities. Further details are provided in the Codes & Code Enforcement strategy.

Campus Town Redevelopment Incentive Program (CTRIP):
Maryville, Missouri

The CTRIP program was created by the City of Maryville, Missouri in 2013 as a way to encourage infill development and remove blighted and dangerous properties.

- Purpose: Incentivize property owners within the Campus Town Overlay to enhance the area through infill and development
- Program: Demolition debris, building permit, and water and sewer tap fees eliminated
- Success: Supported development of approximately 12 projects in the neighborhood ranging from duplex to a 16 unit building. Approximately 45 dangerous structures removed within three years
- Opportunities: Expand past the Campus Town area to include the entire city

<https://www.maryville.org/docview.aspx?docid=32939>

Neighborhood Conservation

Many of the tactics described in the last section will have an important impact on neighborhoods. Elevating value and the sense of financial security in a neighborhood is important to supporting housing quality and improving values.

Reinvestment Areas. The impact of housing rehab and infill development may be diminished if done in a scattered approach. To avoid this, communities should complete a general assessment of housing conditions, sometimes referred to as a windshield survey. Using this survey, a strategy can be developed for creating programs that will have the greatest impact. By targeting the strategies listed in this section, change is more visible and momentum can be built for greater involvement by the private market.

A windshield survey is a drive by assessment of housing conditions from the street. Each house is ranked on a scale of 1 to 5 based on the condition of siding, roofing, windows and doors, and foundation where visible.

● Typical Minor Structural Deficiencies
● Typical Major Structural Deficiencies

INDIANA UPLANDS REGIONAL...

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EMERGING INPUT AND TRENDS

Listening Session and Roundtable Emerging Housing Themes

Severe Housing Gaps:

- No housing for mid-income families (\$225K–\$350K range).
- Empty-nester housing and multi-generational housing needed.
- Starter homes for young professionals and updated low-cost homes.

Rental Market:

- Extremely tight; very low vacancy rates.
- Lower rent units typically poor quality

Affordability Benchmarks:

- \$250K–\$350K considered affordable; under \$185K sells quickly.

Barriers:

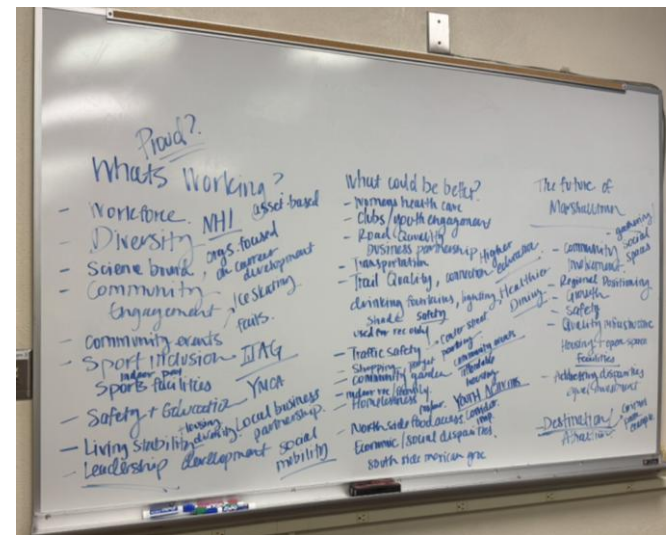
- High construction costs, regulatory hurdles (fire/electrical codes, permits, sidewalk requirements).
- Local trades shortage.
- Lots

Housing Instability & Homelessness:

- Growing need for shelters, especially for women.
- PIT count estimated at 8–16
- Rental assistance options inadequate.
- Section 8 acceptance limited



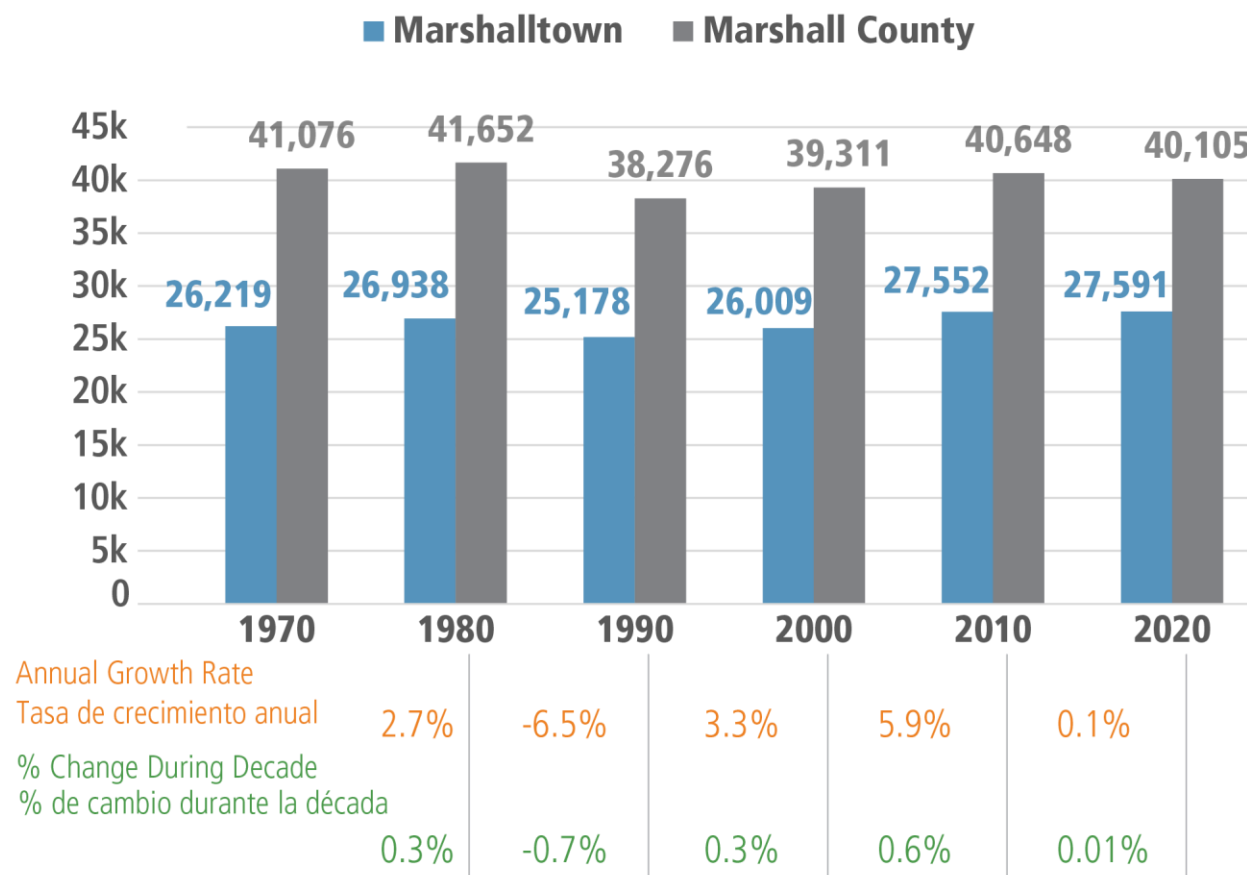
October community meeting



High School listening session results

EMERGING INPUT AND TRENDS

Population Change



Census Population
Estimate Program:
27,464

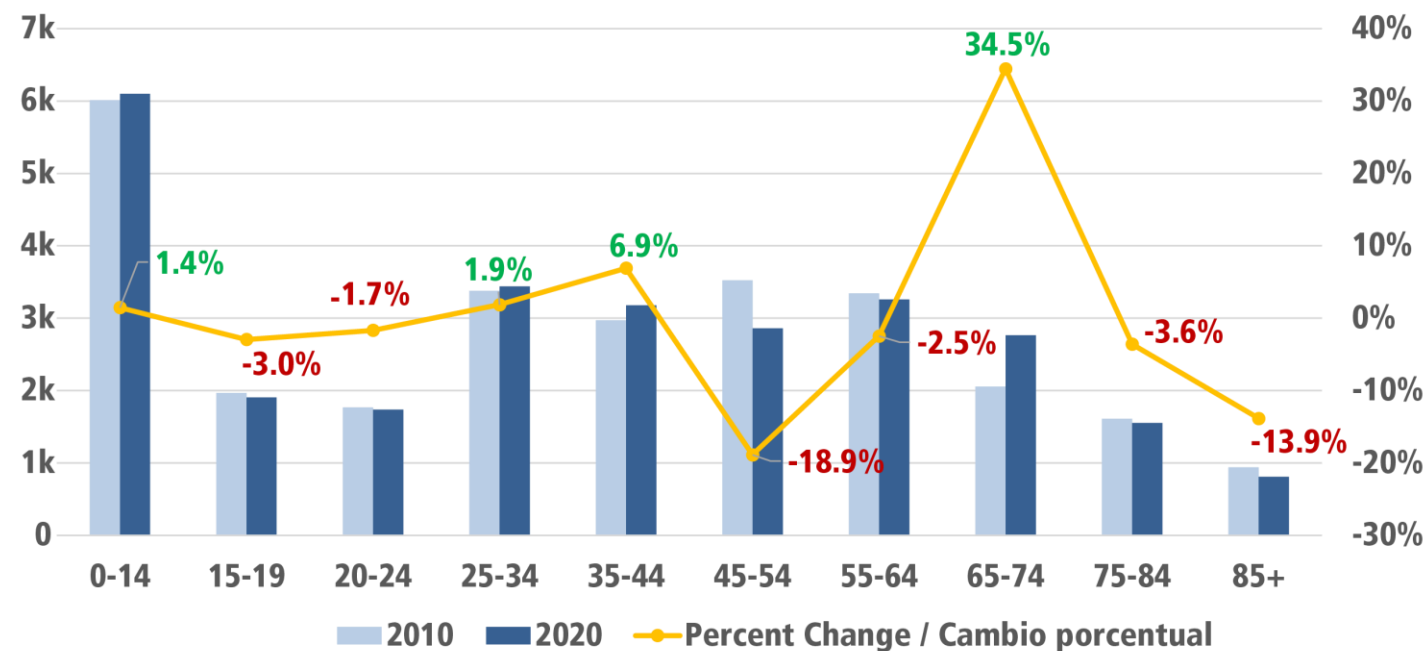
Source: U.S. Census Bureau

EMERGING INPUT AND TRENDS

Cohort Population Change 2010-2020

Age	2010	2020	2010-2020 #Change
0 - 9	4,132	3,878	-254
10 - 19	3,842	4,125	+283
20 - 29	3,496	3,421	-75
30 - 39	3,127	3,432	+305
40 - 49	3,227	2,890	-337
50 - 59	3,559	3,080	-479
60 - 69	2,725	3,183	+458
70 - 79	1,714	2,135	+421
80+	1,730	1,447	-283
Total	27,552	27,591	+39

Source: U.S. Census Bureau; RDG Planning & Design



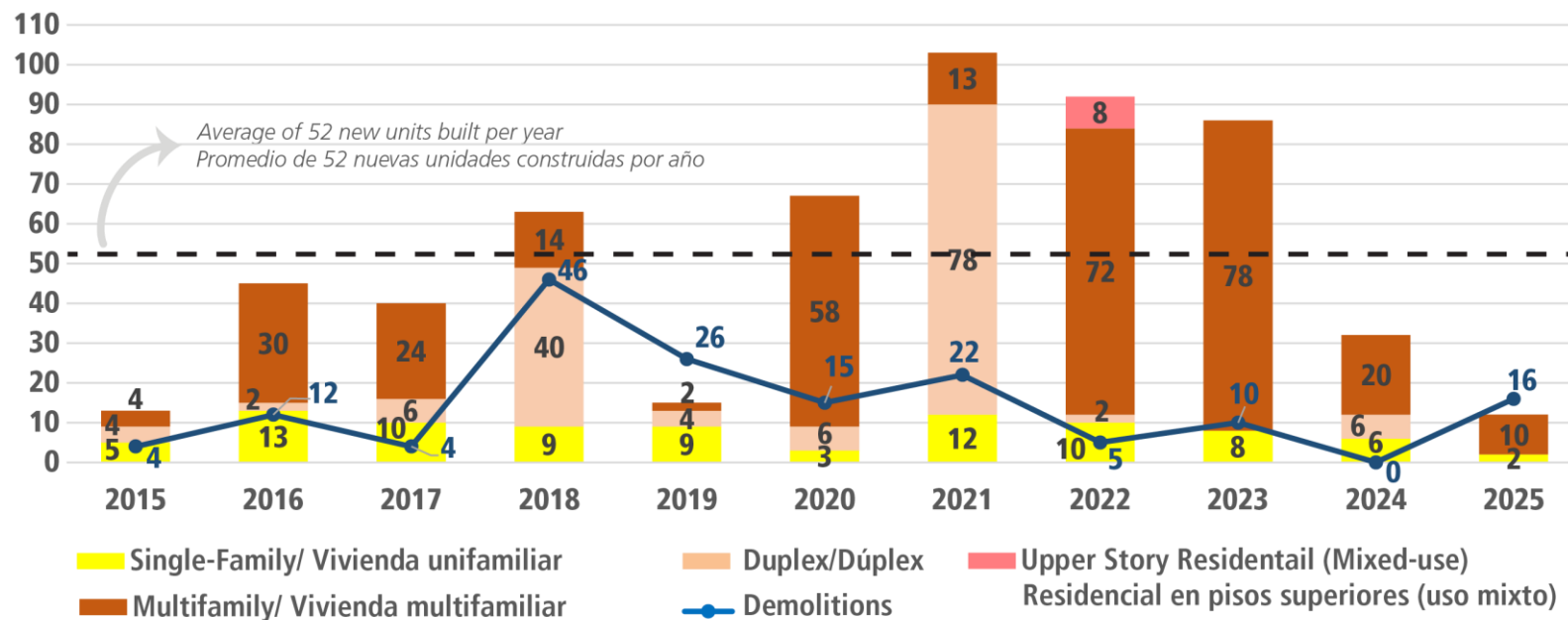
Source: U.S. Census Bureau; RDG Planning & Design

EMERGING INPUT AND TRENDS

Residential Permits and Demolitions

Year	New Units	Demolitions	Net Units
2015	13	4	+9
2016	45	12	+33
2017	40	4	+36
2018	63	46	+17
2019	15	26	-11
2020	67	15	+52
2021	103	22	+81
2022	92	5	+87
2023	86	10	+76
2024	32	0	+32
2025	12	16	-4
Total	568	160	+408

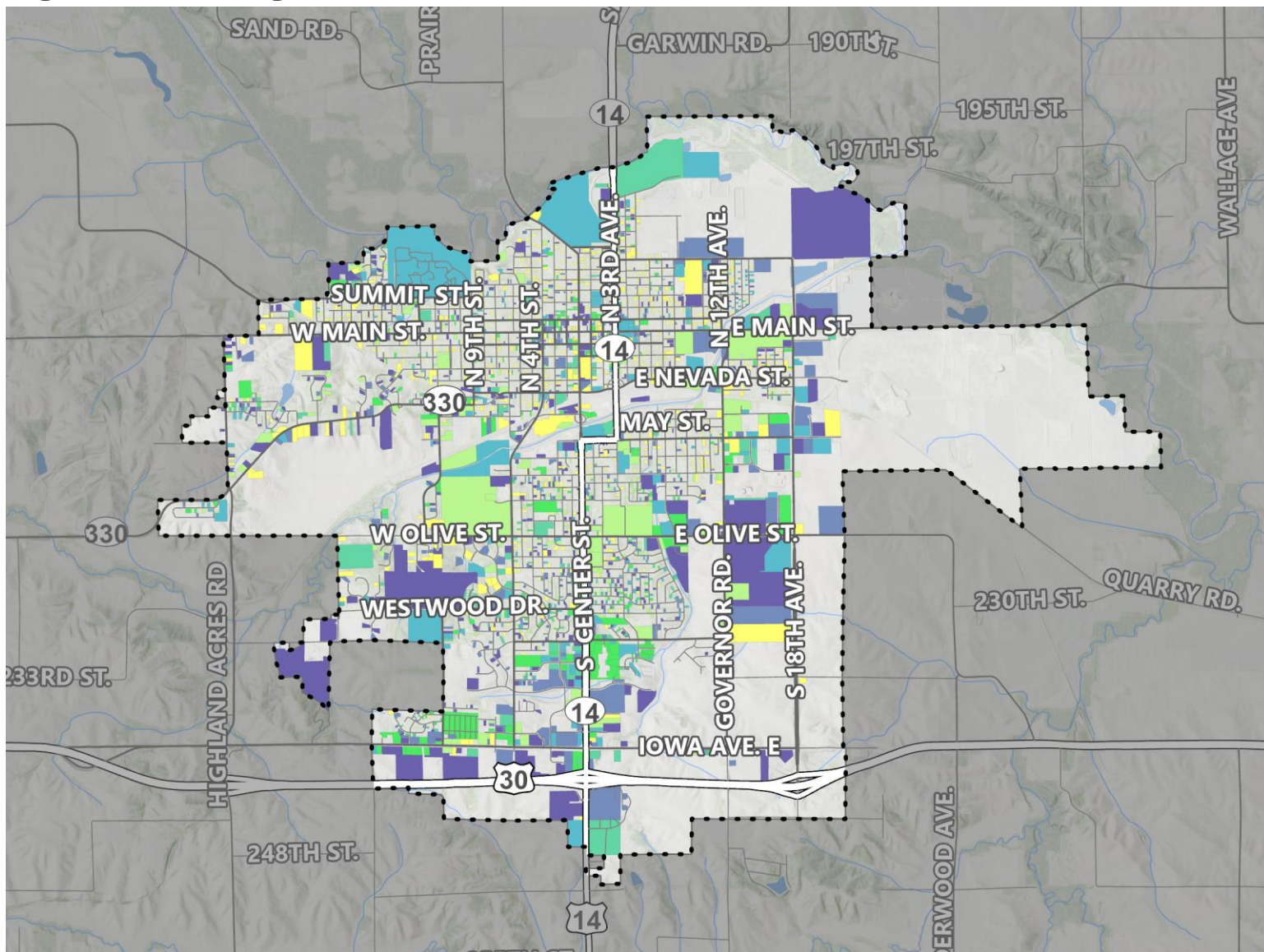
Source: Marshall County Assessor



Source: Marshall County Assessor

EMERGING INPUT AND TRENDS

Age of Housing



Before 1959
53.3%

1960-69
11.6%

1970-79
13.0%

1980-89
6.2%

1990-99
6.2%

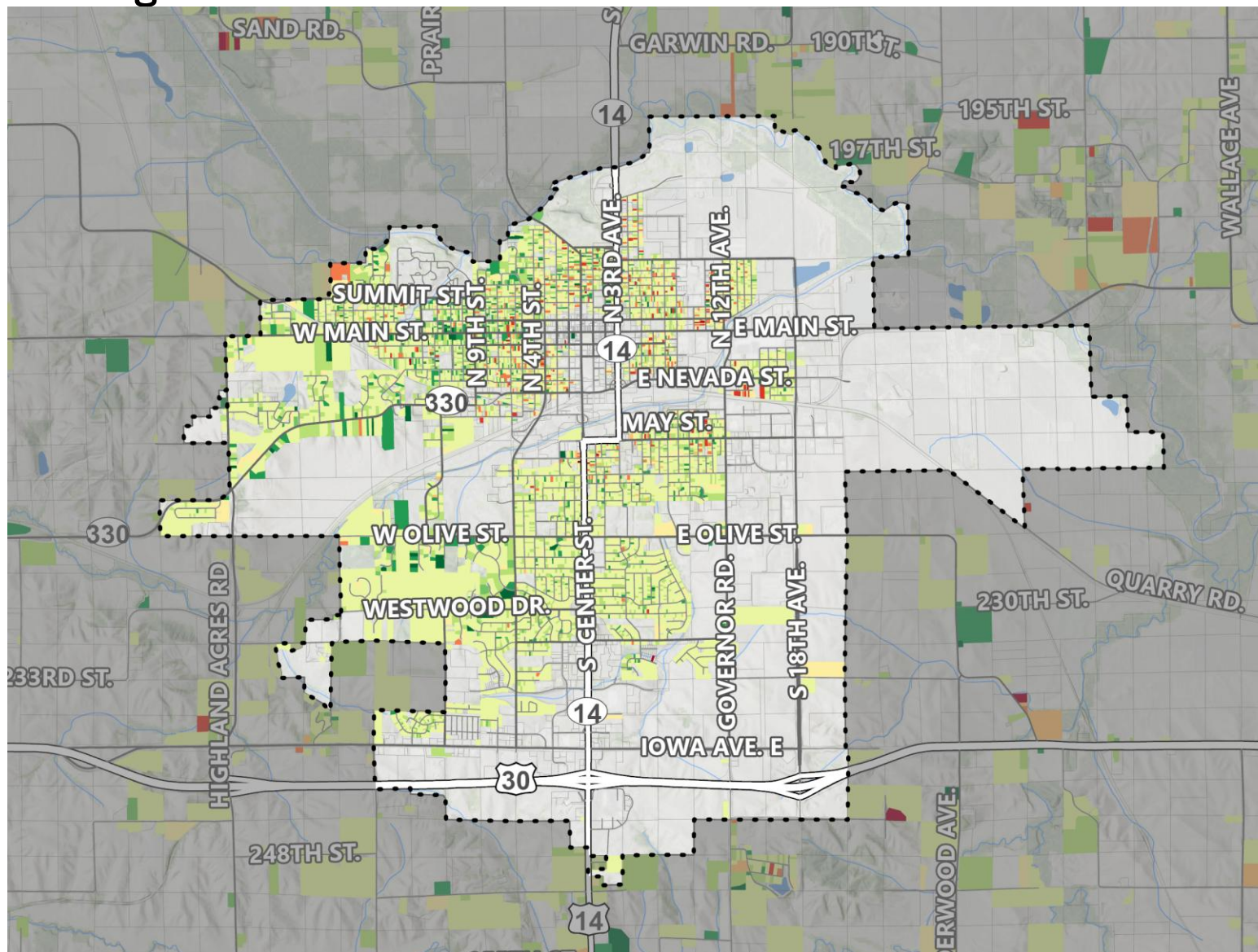
2000-09
6.0%

After 2010
3.7%



EMERGING INPUT AND TRENDS

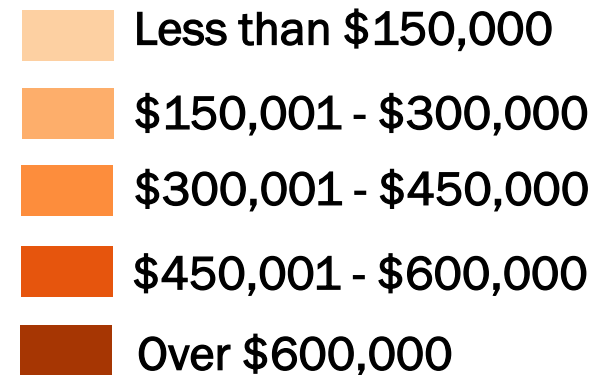
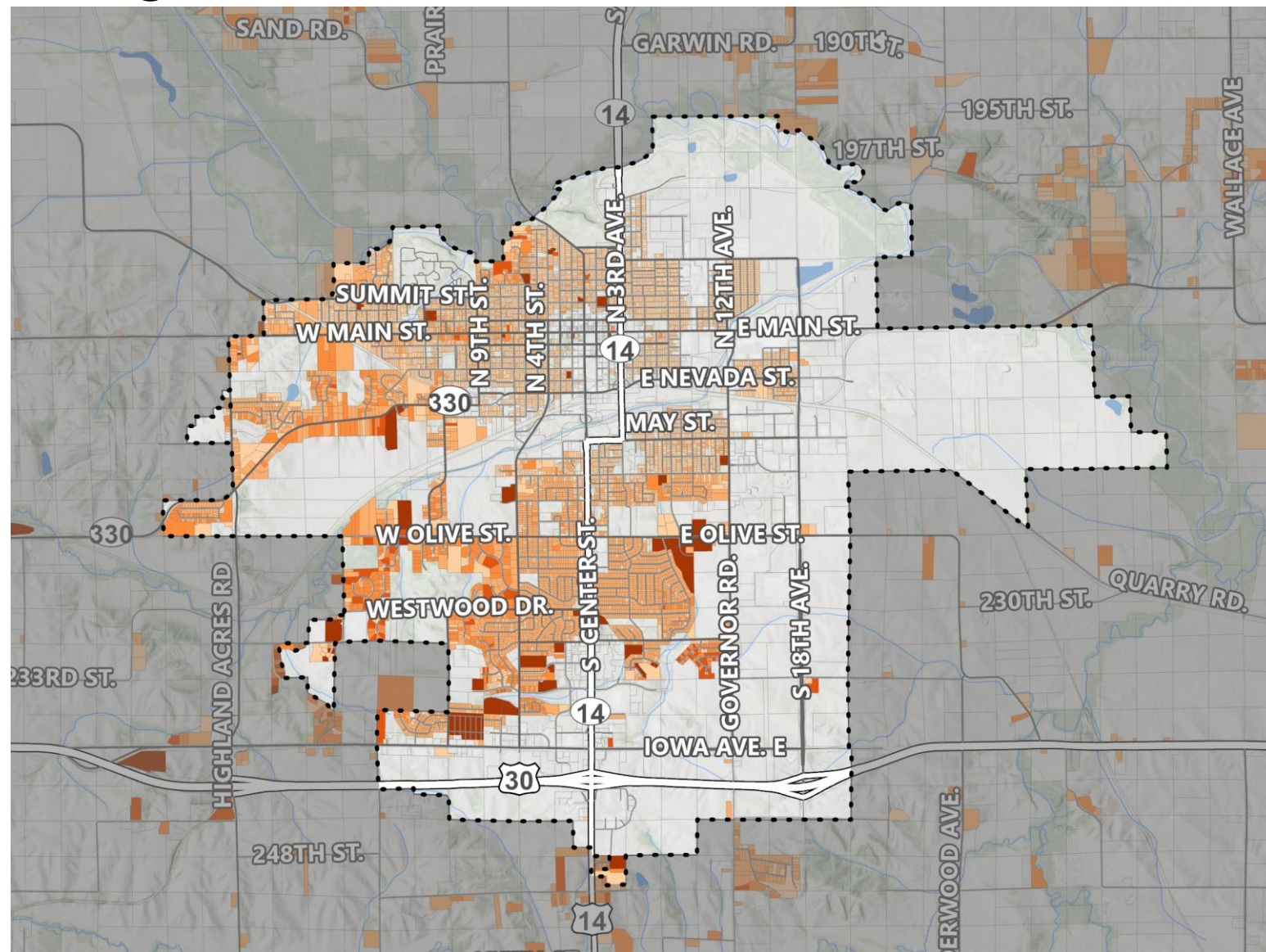
Housing Conditions



- Excellent
- Very Good
- Good
- Above Normal
- Normal
- Below Normal
- Fair
- Poor
- Very Poor
- Observed

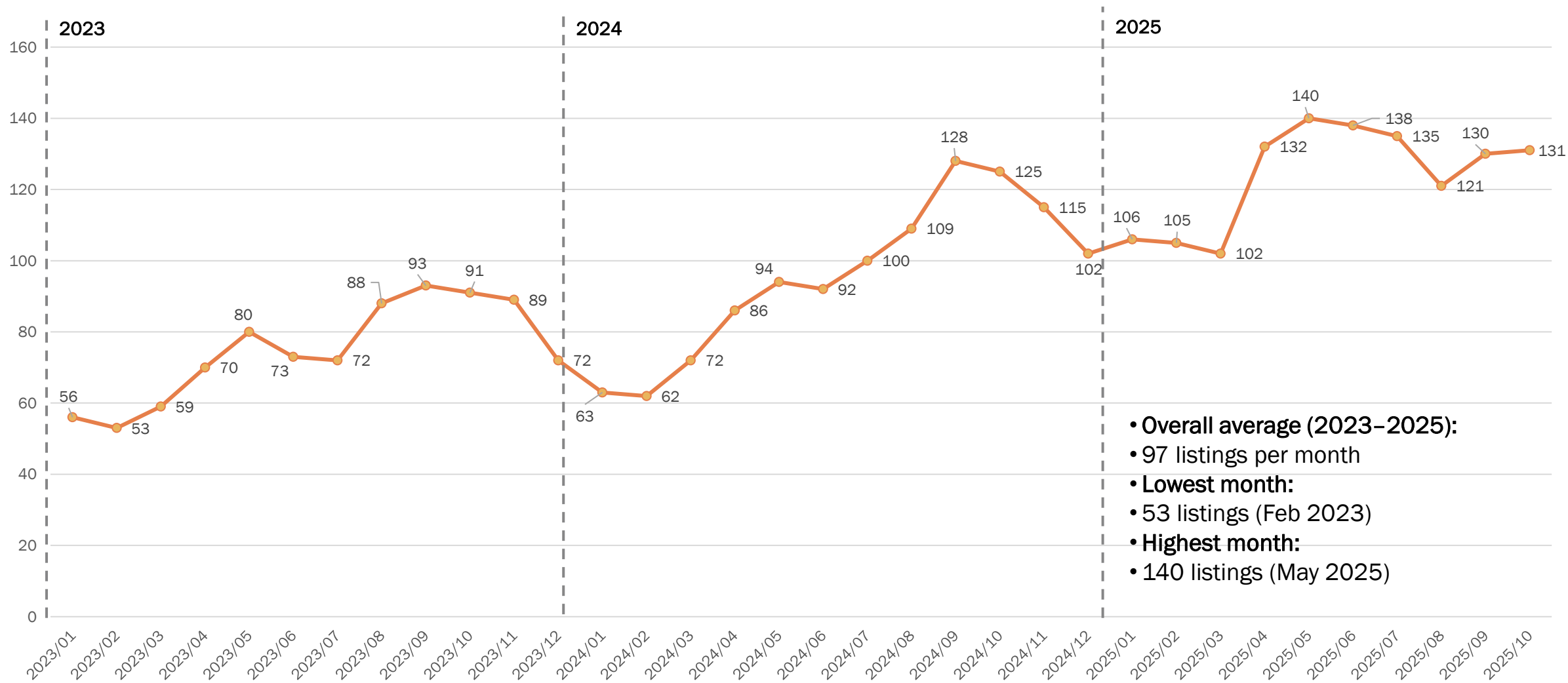
EMERGING INPUT AND TRENDS

Housing Assessed Values



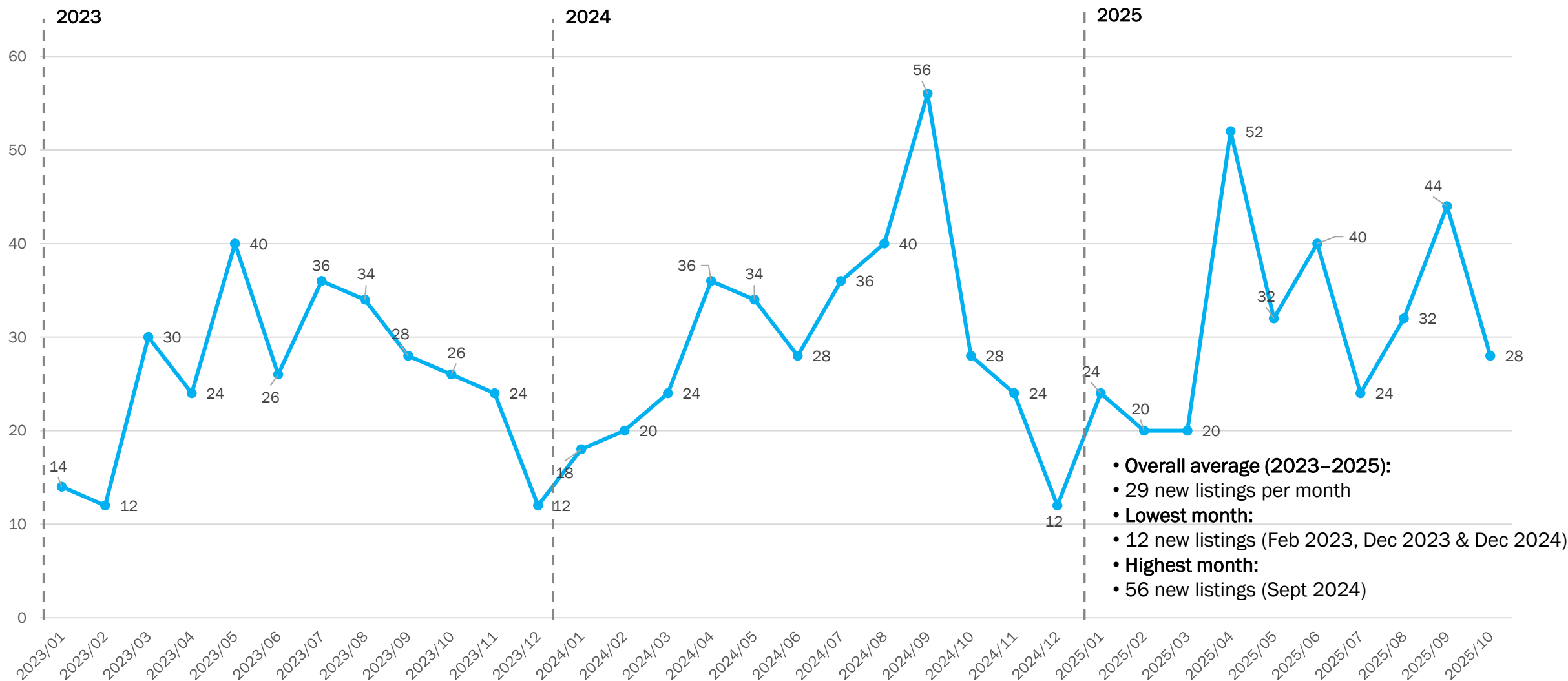
EMERGING INPUT AND TRENDS

Housing Costs | Total Monthly Listings (2023-2025)



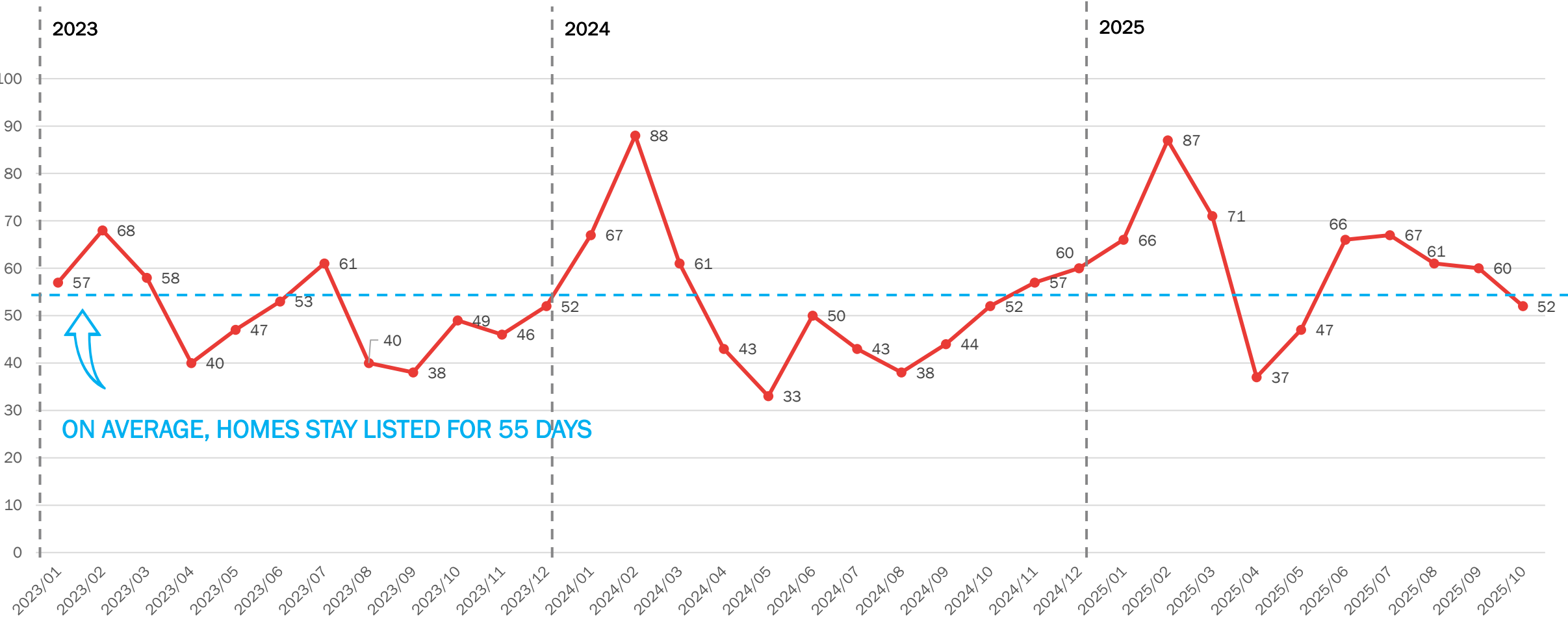
EMERGING INPUT AND TRENDS

Housing Costs | Total Monthly **NEW** Listings (2023-2025)



EMERGING INPUT AND TRENDS

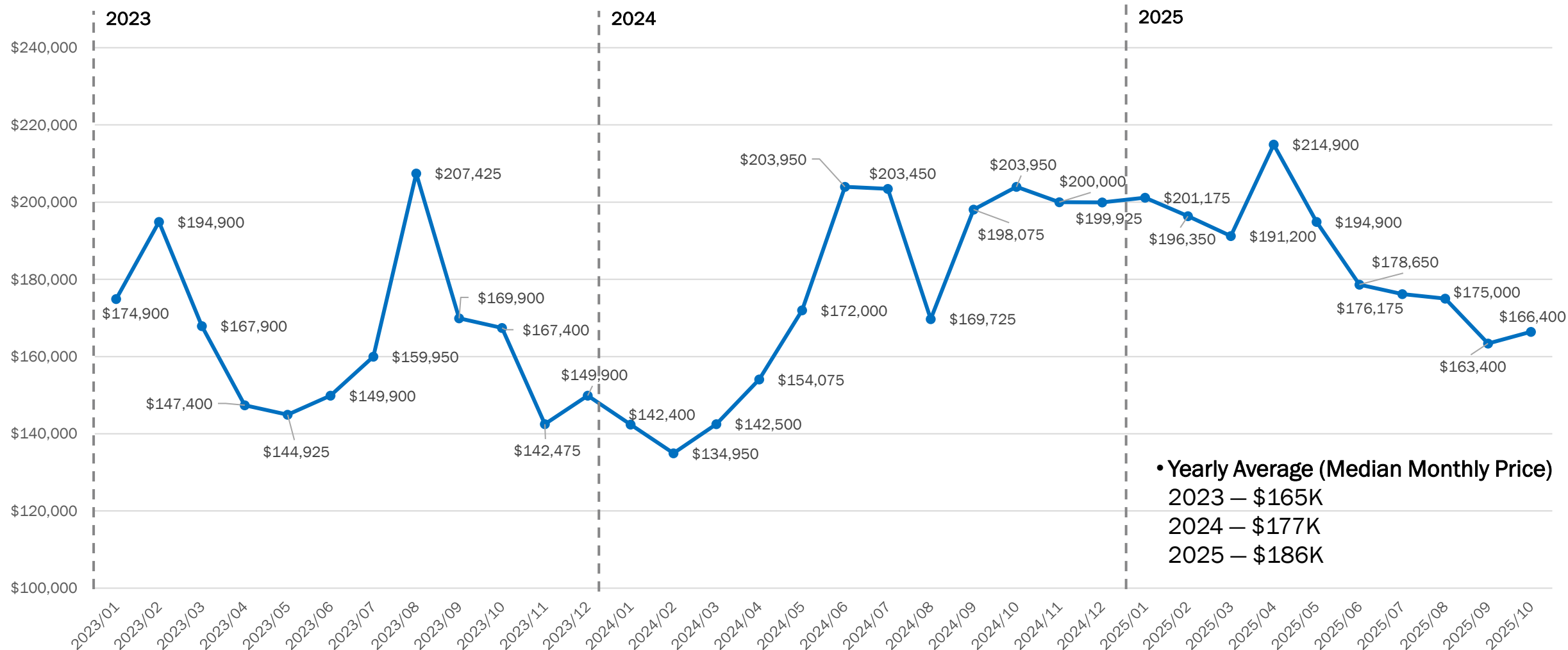
Housing Costs | Median Days on Market (2023-2025)



Source: Realtor.com

EMERGING INPUT AND TRENDS

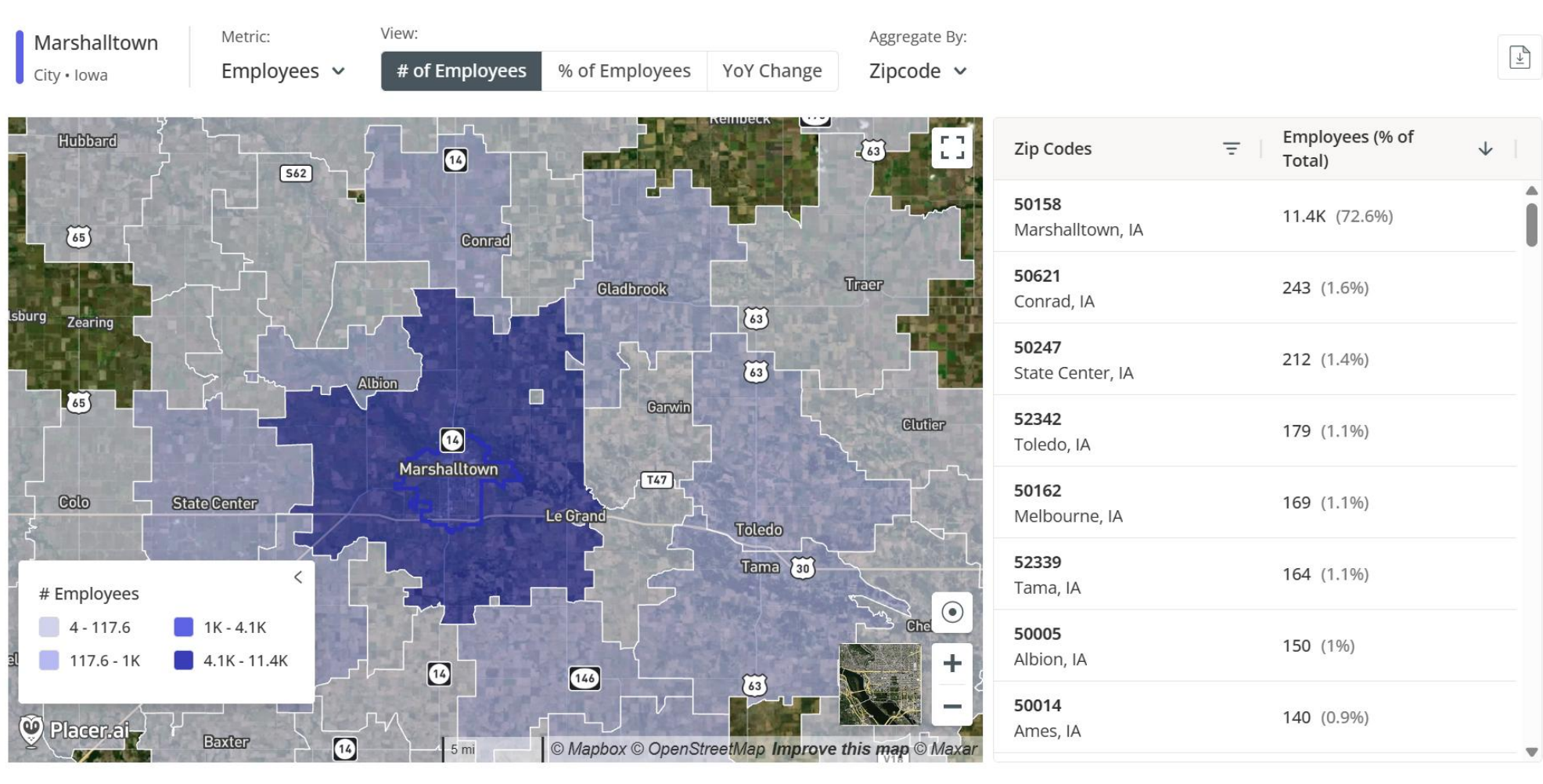
Housing Costs | Median Monthly List Price (2023-2025)



Source: Realtor.com

EMERGING INPUT AND TRENDS

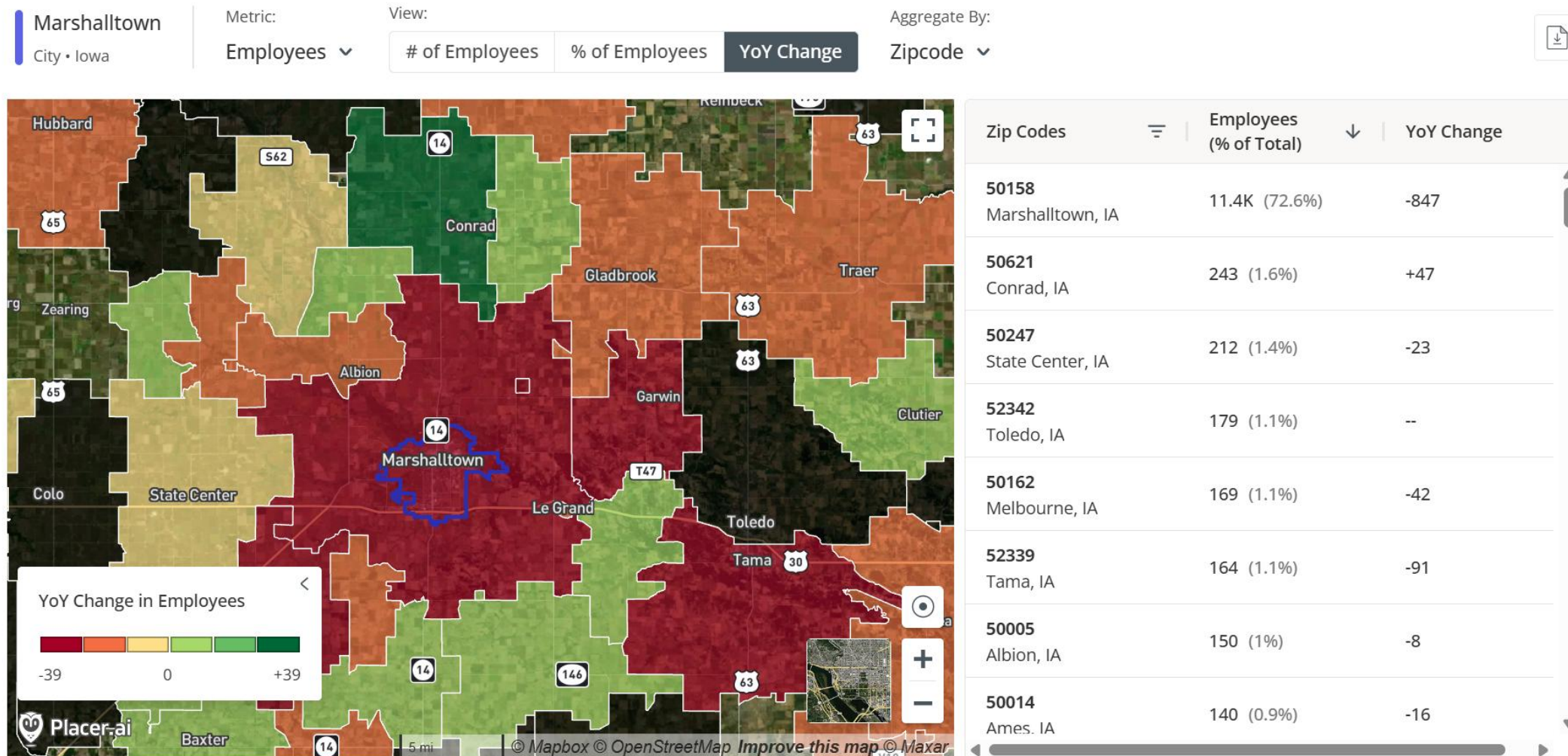
Employment Patterns | Employee Origins



Source: Placer.ai

EMERGING INPUT AND TRENDS

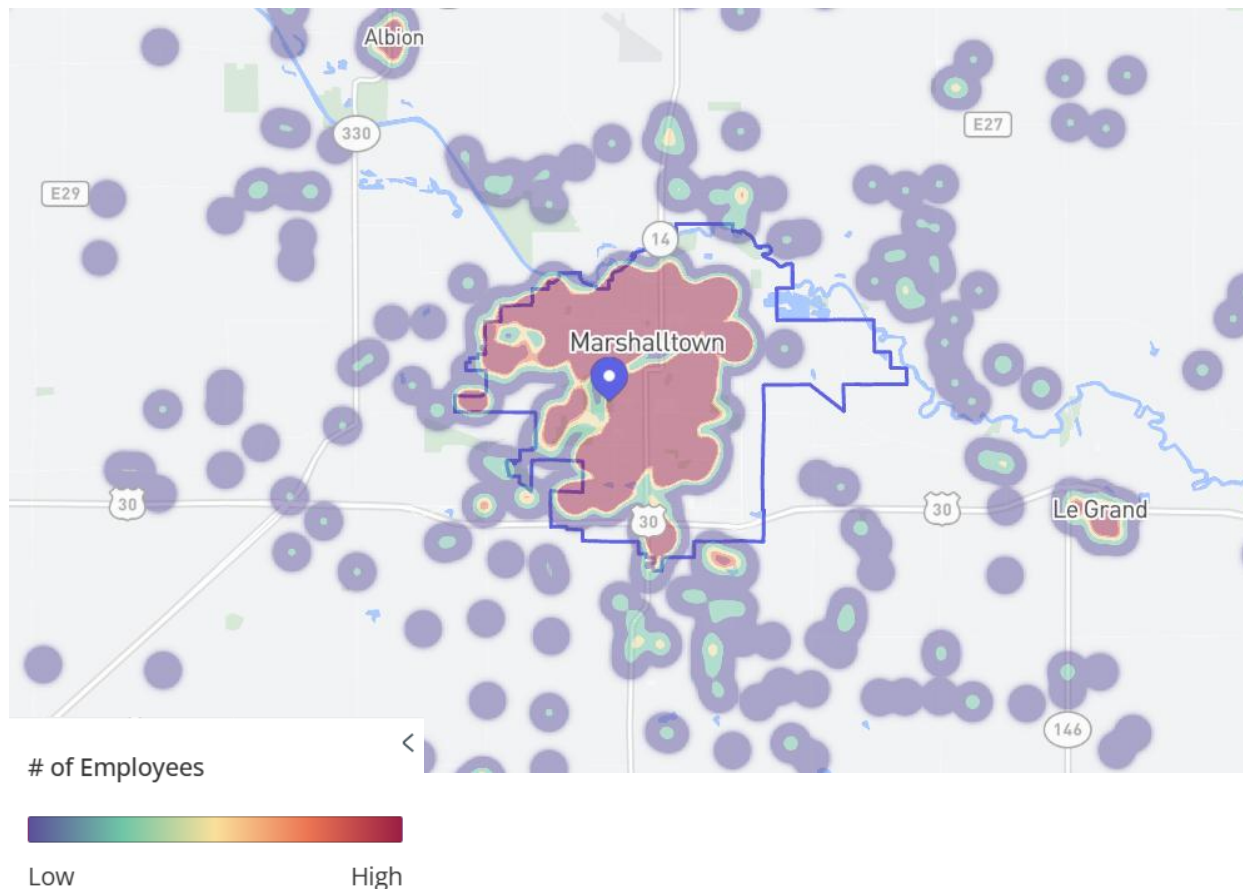
Employment Patterns | Employee Origins



Source: Placer.ai

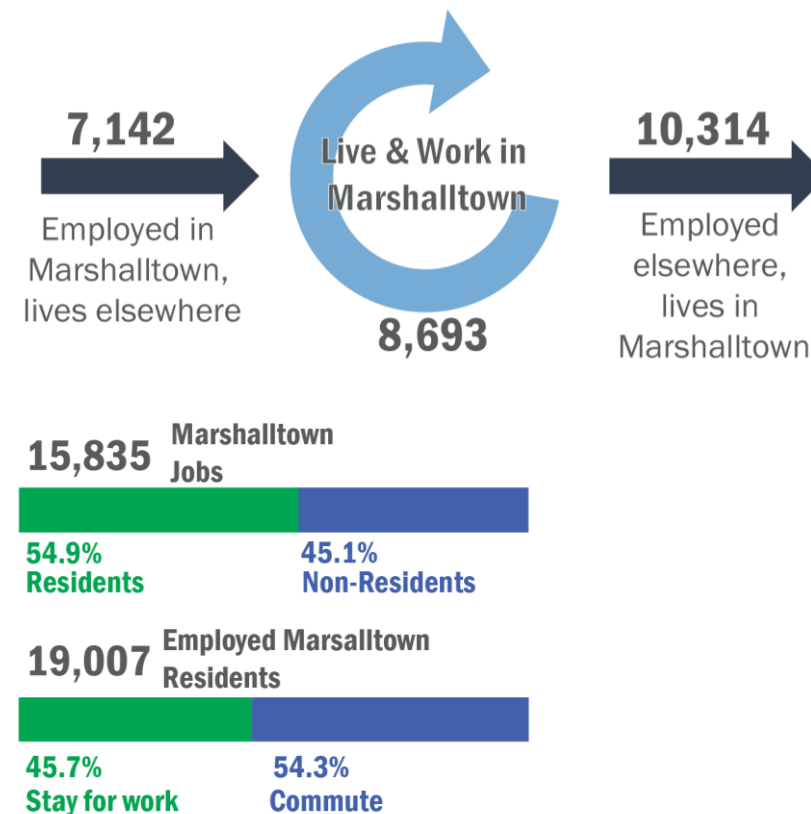
EMERGING INPUT AND TRENDS

Employees' Home Locations



Source: Placer.ai

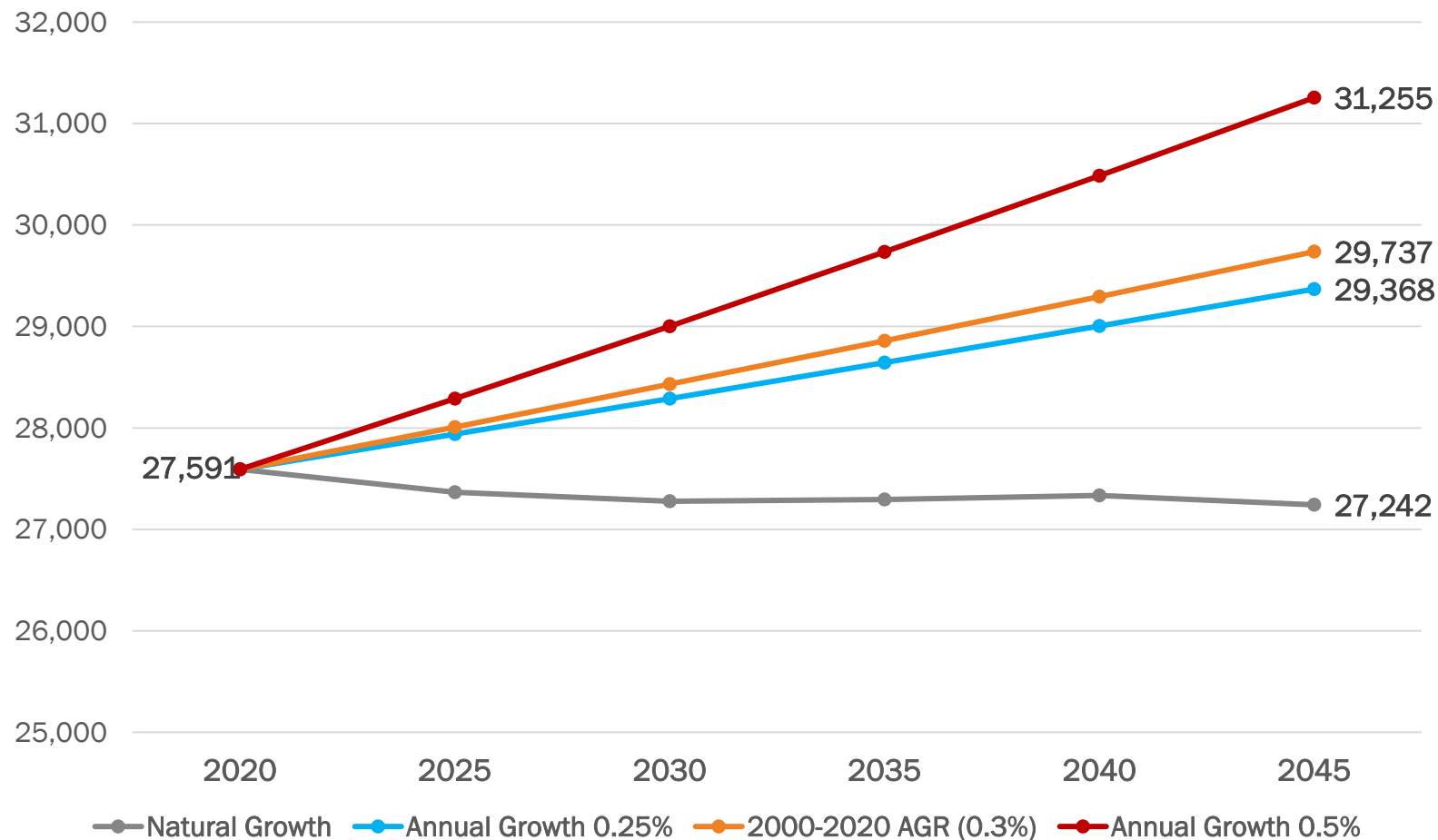
Commuting Patterns



Source: 2023 Census OnTheMap

EMERGING INPUT AND TRENDS

Population Possibilities



NEXT STEPS

- Survey Distribution – Please share when available! (paper and Spanish versions)
 - Landlord and Workforce Survey going out to targeted contacts
- Follow-up listening sessions as needed
- Full market analysis and community atlas
- Next Meeting: Wednesday, January 7th
 - Design Workshop + Housing Forecasts