



INCLUSIONARY HOUSING PUBLICATIONS

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INCLUSIONARY HOUSING PUBLICATIONS

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INCLUSIONARY HOUSING PUBLICATIONS

HOUSING MARKET IMPACTS OF INCLUSIONARY ZONING / Knaap, Gerrit-Jan; Bento, Antonio; Lowe, Scott -- College Park, MD: National Center for Smart Growth Research and Education, 2008, 21 p.

Available full text via the World Wide Web:

<http://www.smartgrowth.umd.edu/research/pdf/KnaapBentoLowe-InclusionaryHousing.pdf>

Inclusionary zoning programs, which require developers to sell a certain percentage of newly developed housing units at below market rates to lower income households, are politically attractive because they are viewed as a way to promote housing affordability without raising taxes or using public funds. Standard economic theory, however, suggests that such programs act like a tax on housing construction. And just like other taxes, the burdens of inclusionary zoning are passed on to housing consumers, housing producers, and landowners. As a result, inclusionary zoning policies could exacerbate the affordable housing problem that they are designed to address. Although debate over the merits of inclusionary zoning has continued for nearly three decades, there have been no rigorous studies on their effects on housing prices and starts. We offer such an analysis here, estimating the effects of inclusionary zoning policies on single family housing prices, single family and multifamily housing starts, and the size of single family housing units in California over the period from 1988 to 2005.

INCLUSIONARY HOUSING: Instant Advocate / Transportation and Land Use Coalition (TALC) -- Oakland, CA: TALC, 2008, 20 p.

Available via the World Wide Web:

<http://www.transcoalition.org/ia/inclhous/01.html>

Whether your community is characterized by an overall lack of affordable housing, by the geographic segregation of the existing affordable housing supply, or by both, implementing a mandatory inclusionary housing requirement can help address both problems simultaneously. Mandatory inclusionary housing policies require developers to construct a certain percentage of units in any new residential development for low- and moderate income households. In exchange for building affordable housing, developers typically receive regulatory flexibility such as expedited permitting, reduced permit fees, increased allowable densities, reduced parking requirements, relaxed development standards (i.e., reduced setbacks, narrower street widths, etc). Cities may also provide one or more financial incentives or 'cost offsets' to developers such as below-market rate construction loans or land 'write-downs' (selling publicly-owned land for reduced price), or tax-exempt mortgage financing for low- and moderate-income homebuyers.

INCLUSIONARY ZONING: A framework for assessing the advantages and disadvantages / Read, Dustin D. / Center for Real Estate at UNC Charlotte -- Washington, DC: Homes for Working Families, May 2008, 31 p.

Available full text via the World Wide Web:

http://www.homesforworkingfamilies.org/resources.dyn/uncc_iz_national.pdf

The study begins by describing the structure of inclusionary zoning ordinances, and explaining how they differ from other affordable housing initiatives. Existing economic literature is reviewed to consider whether inclusionary zoning encourages the production of affordable housing by providing real estate developers with appropriate economic incentives or by shifting the cost of affordable housing to other market participants, such as landowners and market rate homebuyers. The analysis concludes by discussing best practices implemented in urban areas throughout the United States to ensure inclusionary zoning has the greatest impact on housing affordability. Each phase of the analysis is designed to provide a value neutral assessment of inclusionary zoning and its potential effectiveness in different types of housing markets.

INCLUSIONARY HOUSING PUBLICATIONS

INCLUSIONARY ZONING / Oakland, CA: PolicyLink, 2008, 9 p.

Available via the World Wide Web:

<http://www.policylink.org/EDTK/IZ/default.html>

Once common only in suburban jurisdictions, IZ programs are increasingly adopted by urban communities. Generally, IZ policies have been most effective in areas that are experiencing growth, since affordable units are only generated if private residential development is occurring in the community. This tool provides an overview of inclusionary zoning and considers the key issues related to implementing an effective program.

LONG-TERM AFFORDABLE HOUSING STRATEGIES IN HOT HOUSING MARKETS /

Mintz-Roth, Jesse / NeighborWorks America -- Cambridge, MA: Joint Center for Housing Studies of Harvard University, May 2008, 44 p.

Available full text via the World Wide Web:

http://www.jchs.harvard.edu/publications/homeownership/w08-3_mintz-roth.pdf

This paper inventories strategies for maintaining affordable housing toward perpetuity in hot markets in an increasing number of locales. Long-term affordable housing strategies answer the call to make affordable housing resources last longer as federal funding for affordable housing diminishes, rental affordability programs expire, and owners prematurely buy their way out of affordable mortgages. The need is especially acute in hot-market cities, like New York City, that have seen large development programs end without any adequate replacements. The strategies span rental and homeownership delivery mechanisms, subsidy and equity sharing, cooperatives and community governance, land regulation, extending existing termed programs, and amassing funds to sustain affordable housing, with a focus on producing long-term affordable units through inclusionary zoning. Interviews with national policymakers and experienced affordable and mixed-income housing developers bring new light to the success of these mechanisms.

AFFORDABLE BY CHOICE: TRENDS IN CALIFORNIA INCLUSIONARY HOUSING PROGRAMS /

Jacobus, Rick; Hickey, Maureen -- San Francisco, CA: Non-Profit

Housing Association of Northern California (NPH), 2007, 45 p.

Available for purchase via the World Wide Web:

<http://www.nonprofithousing.org/knowledgebank/publications/default.aspx>

Executive Summary & Key Findings:

<http://www.nonprofithousing.org/AffordableByChoice/SampleIHReport.pdf>

This report represents the most ambitious effort in California – and probably the nation – to examine the impact of inclusionary housing policies statewide. The single most important conclusion is that inclusionary programs are putting roofs over the heads of tens of thousands of Californians. These homes, in turn, are building mixed-income neighborhoods where houses considered “affordable” are often indistinguishable from those at market-rate. High school teachers, clergy, health care workers, day care providers – people who are considered lower-income – can now open their front doors and say, “welcome to my home” as a result of inclusionary housing programs. Rising housing costs and shrinking public funds are prompting more local governments to use inclusionary programs. While not a magic bullet for all affordable housing needs, inclusionary programs are a proven tool for building diverse housing that meets the needs of all of a community’s residents.

INCLUSIONARY HOUSING PUBLICATIONS

BELOW-MARKET HOUSING MANDATES AS TAKINGS: Measuring their impact /

Means, Tom, et al. -- Oakland, CA: The Independent Institute, November 2007, 24 p.

Available full text via the World Wide Web:

http://www.independent.org/pdf/policy_reports/2007-11-09-housing.pdf

Housing affordability has become a major issue in recent years. To address the problem, many cities have adopted a policy known as below-market housing mandates or inclusionary zoning. As commonly practiced in California, below-market housing mandates require developers to sell 10–20 percent of new homes at prices affordable to low-income households. Many developers, however, argue that the program is in violation of the takings clause of the U.S. Constitution because it forces developers to use some of their property to advance a public goal. Nevertheless, in *Home Builders Association of Northern California v. City of Napa* (2001), the court ruled against the regulatory takings argument, saying that below market housing mandates are legal because (1) they offer compensating benefits to developers and (2) they necessarily increase the supply of affordable housing. This study investigates these claims.

CALIFORNIA INCLUSIONARY HOUSING POLICY DATABASE / Sacramento, CA:

California Coalition for Rural Housing (CCRH), 2007.

Available via the World Wide Web:

<http://www.calruralhousing.org/housing-toolbox/inclusionary-housing-policy-search>

The California Inclusionary Housing Database contains information on the key characteristics of California IH policies existing in 2006. It is estimated that there were about 170 such policies in the state at that time. CCRH was able to retrieve electronic and hard copy versions of approximately 80% of these policies—over 130.

The database provides summaries of policy characteristics for each city and county. Users may search for these summaries by jurisdiction name or by more than 30 other characteristics or criteria. For example, users may select all jurisdictions with population between 50,000 and 100,000 that have mandatory ordinances, require 15% to 20% of units be affordable to low- and moderate-income households, and allow land dedications or payment of in-lieu fees. In addition, each summary provides a link to the jurisdiction's full policy. A glossary defines key terms.

DELIVERING ON THE PROMISE OF INCLUSIONARY HOUSING: Best practices in administration and monitoring / Jacobus, Rick -- Oakland, CA: PolicyLink, 2007, 21 p.

Available full text via the World Wide Web:

http://www.policylink.org/documents/IZadminarticle_color_web.pdf

Jurisdictions that have been administering inclusionary housing programs for decades have developed a number of successful approaches to staffing these programs and many have been able to identify scalable revenue sources that cover (or help cover) the cost of monitoring and administering inclusionary units even as the number of units in a program grows. This paper outlines several of the most common tasks associated with ongoing administration of inclusionary housing programs and describes some of the common approaches to staffing and paying for implementation. The administrative workload varies tremendously from one program to another based, largely, on the many program design choices that local governments make. While describing all of these choices is beyond the scope of this paper, the description of administrative roles necessarily provides some overview of the choices that have the greatest impact on the administrative workload.

INCLUSIONARY HOUSING PUBLICATIONS

THE EFFECTS OF INCLUSIONARY ZONING ON LOCAL HOUSING MARKETS: LESSONS FROM THE SAN FRANCISCO, WASHINGTON DC AND SUBURBAN BOSTON AREAS / Schuetz, Jenny, et al. / Furman Center for Real Estate and Urban Policy -- Washington, DC: National Housing Conference, November 2007, 102 p.

http://www.nhc.org/pdf/pub_chp_iz_08.pdf

"Many local governments in metropolitan areas with high housing costs are adopting inclusionary zoning (IZ) as a means of producing housing that is affordable to low- and moderate-income households without direct public subsidies. Critics charge that IZ ordinances impose additional costs on new development and may lead to reductions in supply and increases in the price of market rate housing. Advocates of IZ argue that any negative effects IZ might have on production can be mitigated through density bonuses or other cost offsets. Rigorous empirical study of the effects of inclusionary zoning ordinances has been hampered by the lack of accurate, timely data describing IZ and the land use regulatory schemes in which IZ programs fit. In this paper, we use panel data on the adoption and characteristics of IZ in the San Francisco and Washington DC metropolitan areas and the Boston-area suburbs to analyze which jurisdictions adopt IZ, how much affordable housing the programs produce and the effects of IZ on the prices and production of market-rate housing" (p. 1).

INCLUSIONARY ZONING / MIXED INCOME HOUSING: selected references /

Washington, DC: Urban Land Institute, 2007, 150 p. (ULI Information Service Infopacket Series; No. 307)

Available for purchase via the World Wide Web:

http://www.uli.org/AM/Template.cfm?Section=Info_Packets&template=/ECommerce/ProductDisplay.cfm&ProductID=70

This ULI InfoPacket includes photocopies materials on inclusionary zoning and mixed income housing. The types of materials chosen for each Infopacket vary, but usually include magazine articles, unpublished reports, sections from ULI books and reports, project descriptions, and title/tables of contents from relevant books.

INCREASING THE AVAILABILITY OF AFFORDABLE HOMES: A handbook of high-impact state and local solutions / Lubell, Jeffrey / Center for Housing Policy --

Washington, DC: National Housing Conference, 2007, 115 p.

Available full text via the World Wide Web:

http://www.nhc.org/pdf/chp_hwf_analysis.pdf

The purpose of this analysis is to identify promising strategies that states and localities can adopt to expand the availability of homes affordable to teachers, firefighters, nurses and other families who live or work in their communities. In general, the strategies covered by this analysis focus on state and local policies for expanding the supply or otherwise lowering the costs of producing homes. Some policies also seek to enhance families' buying power or more efficiently recycle government funds. In selecting policies for inclusion in the report, priority has been given to those that are flexible enough to meet the varying housing needs of different families and communities, and, in particular, to those that serve families who are not well served by existing federal housing programs. Housing costs, needs and challenges vary substantially from place to place. This is one reason why it is important for communities to conduct a thorough assessment of their specific housing challenges and develop policies that respond appropriately.

INCLUSIONARY HOUSING PUBLICATIONS

ENSURING CONTINUED AFFORDABILITY IN HOMEOWNERSHIP PROGRAMS /

Marshall, Polly V.; Kautz, Barbara / Goldfarb & Lipman LLP -- Sacramento, CA: League of California Cities, 2006, 26 p.

Available full text via the World Wide Web:

http://www.cacities.org/resource_files/24714.Ensuring%20Continued%20Affordability.pdf

“The initial creation of affordable housing for homeowners requires a major effort by local government, developers, housing organizations, and citizens alike. When communities decide to design and implement an inclusionary or other homeownership program, they typically spend a great deal of energy achieving a political consensus on the policy aspects of their programs, such as the income level to be served, the length of affordability, and whether affordability is to be ensured by limiting the price at which homes can be sold (a resale restriction) or by requiring homeowners to share increases in the value of their home with the community (equity-sharing). Drafting an ordinance, issuing government approvals, providing subsidies, and designing appropriate deed restrictions is often time and resource intensive” (p. 1).

MANDATORY INCLUSIONARY ZONING: The answer to the affordable housing problem /

Lerman, Brian R. -- Newton, MA: Boston College Law School, 2006, 35 p.

(Law review article)

Boston College Environmental Affairs Law Review – Vol. 33, No. 2 (2006) p. 383-416

Available full text via the World Wide Web:

http://www.bc.edu/schools/law/lawreviews/meta-elements/journals/bcealr/33_2/ealr_33_2_web.pdf

This Note introduces the concept of inclusionary zoning as a successful method for creating affordable housing. The Note examines the constitutional analyses used for land use ordinances. Then, the Note evaluates existing affordable housing programs, distinguishing between the eastern approach and the western approach. The eastern approach—represented by New Jersey, Massachusetts, and Montgomery County, Maryland—is based upon a “fair share” of affordable housing but lacks any planning requirement. The western approach, as illustrated by Oregon and California, is based upon community planning of all necessary elements including affordable housing, and have successfully required affordable housing development. Ultimately, the Note adopts a perspective that mandatory inclusionary zoning in all communities is the best option and should be valid under an impact fee-like analysis.

SHARED EQUITY HOMEOWNERSHIP: The changing landscape of resale-restricted, owner-occupied housing /

Emmeus Davis, John -- Montclair, NJ: National Housing Institute, 2006, 158 p.

Available full text via the World Wide Web:

<http://www.nhi.org/pdf/SharedEquityHome.pdf>

“The concept of shared equity, restricting the home value appreciation that flows to the homeowner on resale, can be controversial. Some economic fundamentalists object to any limitation on appreciation as an infringement of private property rights, while others see it as hindering the ability of lower-income households to build wealth, a goal that is certainly a legitimate one. These are not frivolous concerns. It is important to remember, however, that these homeownership opportunities were created as a result of public subsidy or other public intervention, as in the case of an inclusionary unit. Sharing the equity is a reasonable quid pro quo, in light of the considerable shelter value that the homebuyer has gained as a result of the public subsidy or intervention, and the public policy value of preserving affordable housing for future generations.”

INCLUSIONARY HOUSING PUBLICATIONS

RECENT DEVELOPMENTS IN LAND USE, PLANNING AND ZONING LAW: Recent developments in inclusionary zoning / Talbert, Cecily; Costa, Nadia; Krumbein, Alison L. -- Chicago, IL: American Bar Association, 2006, 12 p. (Journal article)
Urban Lawyer – Vol. 38, No. 3 (Summer 2006) p. 701-712

Available for purchase via the World Wide Web:

<http://www.abanet.org/statelocal/urbanlawyer/38-3abst.html>

The scarcity of affordable housing results in part from rising housing costs that greatly outpace the earning power of individuals and families, as well as from housing construction that continues to lag behind demand. These realities place housing that is affordable out of reach for many. Faced with these problems, jurisdictions across the nation are attempting to further the goals of producing affordable units while combating exclusionary zoning practices. While local inclusionary zoning programs remain a popular and effective method of increasing affordable housing stock, states are also using other methods to address the affordable housing crisis on a more broad, regionwide basis, including the use of dedicated revenue sources, programs that require localities to provide for affordable housing, and statutes that limit the ability of localities to reject or condition housing projects in a manner that makes them infeasible.

THE BUILDER'S PERSPECTIVE ON INCLUSIONARY ZONING / Tombari, Edward A. - Washington, DC: National Association of Home Builders, 2005, 19 p. (Smart Growth, Smart Choices Series)

Available full text via the World Wide Web:

http://www.nahb.org/fileUpload_details.aspx?contentID=50726

“The primary purpose of this paper is to highlight a ‘cost-benefit’ analysis of the inclusionary zoning policy. It is hoped that the evidence from this paper indicates that the benefits of these programs are minimal, considering the scope of the problem of housing affordability. The costs, on the other hand raise grave concerns about potential negative consequences on housing supply and cost, which clearly outweigh any minimal benefit achieved through these programs. Creating decent, affordable housing and homeownership for the entire socio-economic spectrum of society is a noble one, one that government shares with the home building industry. However, additional regulations, difficult to mitigate cost burdens and proven economic policy failures are not the answer” (p. 16).

ON COMMON GROUND: Joint principles on inclusionary housing policies / Home Builders Association of Northern California (HBANC); Non-Profit Housing Association of Northern California (NPH) -- San Francisco, CA: NPH, August 2005, 8 p.

Available full text via the World Wide Web:

http://www.nonprofithousing.org/attachments/Inclusionary_Principles.pdf

“At its heart, this joint policy statement reflects our shared belief that we need to maximize the limited resources that are currently available to create affordable housing. In terms of inclusionary housing, this means the traditional way of implementing the policy is often not the most effective in producing the most homes at the most affordable prices. In fact, flexibility and adaptation to local market factors are the keys to a more effective and successful program. Based on that premise, the NPH and HBANC offer here some key principles and recommendations on inclusionary housing programs for consideration by jurisdictions that currently have policies as well as those that are in the process of adopting a policy” (p. 2).

INCLUSIONARY HOUSING PUBLICATIONS

HOW DOES INCLUSIONARY HOUSING WORK?: A profile of seven Southern California cities / Los Angeles, CA: Southern California Association of Non-Profit Housing, December 2005, 10 p.

Available full text via the World Wide Web:

http://www.scanph.org/files/IZ.Guide_.pdf

"Inclusionary housing (IH) policies require developers to reserve a certain percentage of housing units for very low, low, and moderate-income households in new residential developments. Over 20% of the jurisdictions in California have adopted IH policies in the form of a local ordinance or General Plan policy. The Southern California Association of Non Profit Housing (SCANPH) researched 7 Southern California cities that have implemented IH (Brea, Irvine, Oxnard, Pasadena, Port Huemene, San Clemente, and Santa Paula) to get information about the productivity of their policies. We analyzed the inclusionary zoning codes for each of these cities, and spoke directly to city planners and local developers to get an in depth understanding of the specific planning, landuse, and political factors that influence the productivity of the inclusionary housing ordinance in each city. We also looked at how population, land availability, and overall housing development influence the productivity of the inclusionary housing in these cities" (p. 3).

THE INCLUSIONARY HOUSING DEBATE: The effectiveness of mandatory programs over voluntary programs / Brunick, Nicholas J. -- Chicago, IL: American Planning Association (APA), 2004, 7 p. (Journal)
Zoning Practice – Issue No. 9 (September 2004) p. 1-7

Available full text via the World Wide Web:

<http://www.planning.org/affordablereader/znzp/ZPSep04.pdf>

Every community will engage in its own political debate and evaluate its own legal authority to determine its position on mandates and incentives. However, experience with inclusionary housing, both recent and long-standing, provides a number of insights on this important policy decision. Overall, mandatory programs produce more housing, including housing for lower-income populations. They also provide more predictability for developers and the community, and do not stifle development activity. As a result, more communities are choosing mandatory approaches. This issue of Zoning Practice, the first in a two-part series on affordable housing, examines inclusionary housing program experiences and studies from across the country.

INCLUSIONARY HOUSING: Proven success in large cities / Brunick, Nicholas J. -- Chicago, IL: American Planning Association (APA), 2004, 10 p. (Journal)
Zoning Practice – Issue No. 10 (October 2004) p. 1-10

Available for purchase via the World Wide Web:

<http://www.planning.org/abstracts/details.asp?Num=2086>

This issue of Zoning Practice---the second in a two-part series on inclusionary housing---discusses why large urban centers are examining and adopting inclusionary housing strategies. Until recently, no large U.S. city had adopted an inclusionary housing program. With the 1990s resurgence of many urban centers as vibrant locations for new investment, inclusionary zoning has surfaced as a policy solution to rising housing costs in big cities. In the article, author Nicholas J. Brunick presents five case studies of recently enacted inclusionary housing programs in Boston, Denver, Sacramento, San Diego, and San Francisco. Lessons that other local governments (large or small) can draw from the large-city inclusionary housing experience will be proposed and examined.

INCLUSIONARY HOUSING PUBLICATIONS

AFFORDABLE HOUSING IN MONTEREY COUNTY: Analyzing the General Plan Update and Applied Development Economics Report / Powell, Benjamin; Stringham, Edward; Summers, Adam B. -- Los Angeles, CA: Reason Foundation, August 2004, 28 p. (Policy Study No. 323)

Available full text via the World Wide Web:

<http://www.reason.org/ps323.pdf>

“The Economic Impact Analysis of Monterey County’s General Plan Update highlighted two important problems: housing affordability and the fiscal burden on local governments caused by new development. However, the conclusions that development needs to be limited and guided to particular areas while below-market rate housing is mandated are not justified by these problems. In fact, the “solution” of limiting development directly contradicts the housing affordability goal. Land-use regulations that limit development drive up housing costs and hurt the poor. Affordable housing mandates are incapable of solving the housing affordability problem and actually make it worse for the vast majority of homebuyers” (p. 23).

DO AFFORDABLE HOUSING MANDATES WORK? : Evidence from Los Angeles County and Orange County / Powell, Benjamin; Stringham, Edward -- Los Angeles, CA: Reason Public Policy Institute (RPPI), 2004, 32 p. (RPPI Policy Study No. 320)

Available full text via the World Wide Web:

<http://www.rppi.org/ps320.pdf>

“Despite the good intentions of those who support inclusionary zoning, economics tell us that price controls on new housing will have the unintended consequence of reducing the quantity of new homes built. Rather than helping, inclusionary zoning will actually make the affordability problem worse. We have shown that inclusionary zoning imposes significant costs on the housing sector. Those costs are passed on to landowners and buyers of market-rate homes. Higher housing prices will result. Something should be done about the affordability crisis, but price controls are not the answer and may be part of the problem. Southern California cities will never be able to rely on inclusionary zoning to meet their housing needs. In fact, inclusionary zoning has led to a decrease in housing production. Rather than continuing to impose these policies, jurisdictions would do well to eliminate them” – (p. 21).

HOUSING SUPPLY AND AFFORDABILITY: Do affordable housing mandates work? / Powell, Benjamin; Stringham, Edward -- Los Angeles, CA: Reason Public Policy Institute (RPPI), 2004, 48 p. (RPPI Policy Study No. 318)

Available full text via the World Wide Web:

<http://www.rppi.org/ps318.pdf>

“During the past 20 years, a number of publications have debated the merits of inclusionary zoning programs. Nevertheless, as a recent report observed, ‘These debates, though fierce, remain largely theoretical due to the lack of empirical research.’ This study attempts to fill the research void. In this paper we use data from communities in the San Francisco Bay Area region to evaluate the effects of inclusionary zoning and examine whether it is an effective public policy response to high housing prices. We chose the Bay Area because inclusionary zoning is particularly prevalent there; today more than 50 jurisdictions in the region have inclusionary zoning. These communities have various sizes and densities with different income levels and demographics, so they provide a good sample to tell us how inclusionary zoning is probably working nationwide.” – (p. 3).

INCLUSIONARY HOUSING PUBLICATIONS

INCLUSIONARY ZONING: Program design considerations (with a program design checklist) / Columbia, MD: Enterprise Community Partners, Inc., 2004, 13 p.

Available full text via the World Wide Web:

<http://www.practitionerresources.org/cache/documents/261/26115.doc>

This document discusses many of the major considerations involved in designing an inclusionary zoning program for the purpose of creating more affordable housing in a community. Topics covered include: appropriate markets for inclusionary programs; mandatory versus voluntary programs; impact on landowners and developers; need for economic analysis of proposals; nexus argument; definition of affordable housing; applicability of guidelines; qualifying individual households; percentage and types of affordable housing required; construction standards; nature and duration of affordability controls; provision of affordable housing on-site and off-site; payments in lieu of providing affordable housing; regulatory agreements and enforcement; compensating benefits to developers; and desired results of guidelines. A program design checklist addresses similar issues more succinctly. This information will be of use to localities and jurisdictions creating housing policy. Programs of this type are most applicable to strong real estate markets where increasing market prices of land have forced out most affordable housing construction.

POLICY CLAIMS WITH WEAK EVIDENCE : A critique of the Reason Foundation study on inclusionary housing policy in the San Francisco Bay Area / Basolo, Victoria; Calavita, Nico -- Irvine, CA: University of California at Irvine, 2004, 15 p.

Available full text via the World Wide Web:

http://www.nonprophousing.org/actioncenter/campaigns/download/IH_countering_critics.pdf

“The Reason Foundation study of Inclusionary Housing (IH) in the San Francisco Bay Region claims to examine ‘the economic and real-world consequences of inclusionary zoning.’ In reality, the study does not provide the empirical evidence necessary to assess the merits or demerits of IH. The narrow scope of the research, the flawed research design, the data limitations and the weaknesses of the analysis are so consequential that few, if any, of their conclusions are useful to policymakers” (p. 4).

VOLUNTARY OR MANDATORY INCLUSIONARY HOUSING?: Production, predictability, and enforcement / Brunick, Nicholas; Goldberg, Lauren; Levine, Susannah -- Chicago, IL: Business and Professional People for the Public Interest, 2004, 11 p.

<http://www.bpichicago.org/documents/mandatoryv.voluntary5.06.pdf>

In response to the nationwide affordable housing crisis, many local governments are turning to inclusionary zoning as an effective local tool for generating much needed affordable housing. In crafting an inclusionary housing program, every community faces a major decision: should the inclusionary housing program be mandatory or voluntary?... Every community will engage in its own political debate and evaluate its own legal authority to determine its position on mandates and incentives. However, experience with inclusionary housing, both recent and long-standing, provides a number of insights on this important policy decision. Overall, mandatory programs have produced more housing, produced more housing for lower-income populations; provided more predictability for developers and the community; and have not stifled or chilled development activity. As a result, more communities are choosing mandatory approaches. This article will explore this issue by examining program experience and studies from across the country.

INCLUSIONARY HOUSING PUBLICATIONS

INCLUSIONARY ZONING FOR AFFORDABLE HOUSING / Porter, Douglas R. -- Washington, DC: Urban Land Institute, 2004, 110 p. (Book)

Available for purchase via the World Wide Web:

<http://www.uli.org/AM/Template.cfm?Section=Bookstore&Template=Ecommerce/ProductDisplay.cfm&Productid=1209>

How do you meet the needs of developers that want approval for higher density projects and also provide the community with the affordable housing it needs? Inclusionary zoning is the answer. Originally conceived in the 60's, and adapted over the decades, today's inclusionary zoning programs offer developers incentives in return for including affordable units within market-rate developments. This book describes best practices and techniques for creating an effective inclusionary zoning program based on the experiences of industry experts, an evaluation of state, regional, and local programs, and case studies of 15 communities across the nation.

INCREASING HOUSING OPPORTUNITY IN NEW YORK CITY: The case for inclusionary zoning / Rose, Kalima; Lander, Brad; Feng, Karoleen -- Brooklyn, NY: Pratt Institute, 2004, 60 p.

Available full text via the World Wide Web:

<http://www.picced.org/pubs/izreport.pdf>

New York City neighborhoods are about to change dramatically. The administration of Mayor Michael Bloomberg is undertaking substantial redevelopment plans, neighborhood by neighborhood, which will alter the pattern of growth for generations to come. At the same time, New York City's housing costs have marched dramatically upward, making it increasingly difficult for many New Yorkers to afford housing. The proposed planning changes can either deepen the challenges of affordability, or set a new course toward ensuring a diverse, stable housing stock that serves the needs of the spectrum of New Yorkers. Inclusionary zoning—setting aside affordable units in new housing developments—offers New Yorkers a tool to guarantee that the benefits of changes occurring in their communities will be fairly shared in the years to come.

OPENING THE DOOR TO INCLUSIONARY HOUSING / Anderson, Mary -- Chicago, IL: Business and Professional People for Public Interest, 2003, 117 p.

Available full text via the World Wide Web:

<http://www.bpichicago.org/documents/OpeningtheDoor.pdf>

After a general introduction to Inclusionary Housing, the first part of the workbook is divided into specific sections to address the nuts and bolts of an Inclusionary Housing Program. Utilizing the experience of 12 different municipalities from around the country, each section addresses specific issues in the creation and implementation of an Inclusionary Housing Program. The workbook is not meant to be read cover-to-cover, but to be used as a reference guide by municipalities as they work through the process of creating an Inclusionary Housing Program that fits the needs and opportunities of their own community. The second part of the workbook contains specific case studies of 12 cities in the country that have implemented mandatory Inclusionary Housing Programs. Each of these case studies contains a narrative describing the general characteristics of the program, as well as the accomplishments and the challenges of each program. Each case study also contains the actual ordinances and regulations for each of the programs so readers can review the language used by other municipalities.

INCLUSIONARY HOUSING PUBLICATIONS

"AFFORDABLE" HOUSING LAWS MAKE HOMES MORE EXPENSIVE / Powell, Benjamin; Stringham, Edward / American Institute for Economic Research (AIER) -- Great Barrington, MA: AIER, 2003, 8 p. (Newsletter article)
Economic Education Bulletin – Vol. 43, No. 12 (December 2003) p. 1-8

Available full text via the World Wide Web:

<http://www.sjsu.edu/faculty/powell/docs/EEB-12-03-AffordableHsg.pdf>

“By diminishing incentives for landowners to provide land for housing and incentives for builders to undertake projects, inclusionary zoning restricts the supply of housing. This drives up the price of all other market-priced homes and makes housing less affordable. Even the few families who do get the price-controlled units do not receive the full benefits of homeownership since their potential appreciation is limited. A free market in housing can benefit all income groups and keep prices affordable. The problem is that existing government land-use regulations and zoning practices have prevented the supply of homes from increasing fast enough to meet demand. If promoting affordable housing is the goal, the answer is to roll back existing regulations that discourage the supply of housing. That includes repealing the very inclusionary zoning ordinances that were passed in response to increasing prices” (p. 7-8).

CALIFORNIA INCLUSIONARY HOUSING READER / Higgins, Bill, ed. -- Sacramento, CA: Institute for Local Self Government, 2003, 164 p.

Available full text via the World Wide Web:

http://www.cacities.org/resource_files/20276.California%20Inclusionary%20Housing%20Reader.pdf

The goal of this Reader is to help community leaders evaluate whether inclusionary housing ordinances are for their community. Moreover, since many communities already have inclusionary requirements, the Reader also helps communities evaluate and possibly update their existing ordinances to meet current community needs. The Reader pursues these goals by offering local officials analyses of the following: policy considerations; case studies; implementation and monitoring; legal issues; and links to online resources. For those local agencies interested in adopting or revising inclusionary housing ordinances, the Reader offers a sample ordinance annotated with drafting notes. Also included is a sample, one page description of inclusionary housing ordinances for local agencies to include in any public hearing notices relating to the adoption of inclusionary housing ordinances.

INCLUSIONARY HOUSING IN CALIFORNIA: 30 Years of Innovation / Sacramento, CA: California Coalition for Rural Housing (CCRH), 2003, 48 p.

Available full text via the World Wide Web:

<http://www.calruralhousing.org/publications/46-inclusionary-housing-in-ca-30-years-of-innovation>

This report examines the increasing prevalence and impact of inclusionary housing programs as one of the most promising ways to address the affordable housing crisis in California. The California Coalition for Rural Housing (CCRH) and the Non-Profit Housing Association of Northern California (NPH) summarize their survey findings and highlight key program features that are successfully creating affordable housing in 20 percent of the localities in California. This represents a two-thirds increase in inclusionary programs in California over the last decade, indicating the growing popularity and importance of this affordable housing strategy. The report is intended to inform policy makers and the public about the central policy decisions in creating an effective inclusionary housing program.

INCLUSIONARY HOUSING PUBLICATIONS

INCLUSIONARY HOUSING AFTER HOME BUILDERS ASSOCIATION OF NORTHERN CALIFORNIA v. NAPA / Sacramento, CA: Institute for Local Self Government, 2003, 21 p.

Available full text via the World Wide Web:

http://www.cacities.org/resource_files/24716.PZEInclusionaryhgousing.pdf

In Home Builders Association of Northern California v. City of Napa, “the California Court of Appeal affirmed (at least generally) the validity of inclusionary housing policies....Cities and counties are increasingly relying on inclusionary policies to provide their fair share of affordable housing. In a nutshell, inclusionary housing requires new development to mix low- and moderate-income units with market-rate units to increase the supply of affordable housing and foster economic integration....This paper provides an overview of the legal issues surrounding inclusionary housing” (p. 1).

INCLUSIONARY HOUSING PROGRAMS: Local governments respond to California's housing crisis / Talbert, Cecily T; Costa, Nadia L -- Newton, MA: Boston College of Law, 2003, 14 p. (Law review article)

[Boston College Environmental Affairs Law Review – Vol. 30, No. 3 \(2003\) p. 567-580](#)

Available full text via the World Wide Web:

http://www.bc.edu/schools/law/lawreviews/meta-elements/journals/bcealr/30_3/06_FMS.htm

Nine of the ten least affordable communities in the country are in California. California also has one of the most complicated and expensive environmental regulatory processes for development. This results in builders being unable to produce housing to keep up with demand, and an increase in the cost of those units that are available. ‘Smart Growth’ is often proffered as the answer to this dilemma: by promoting more compact development, mixed-use and mixed-income neighborhoods, and creating jobs near housing and transportation, housing production will be available to meet the demand at affordable costs. While these principles may serve as a valuable planning guide, they are not a panacea. In this respect, local governments have used inclusionary housing programs as one tool to respond to this escalation of housing costs and probably will continue to do so.

KEEPING FOR-SALE UNITS AFFORDABLE OVER TIME: One important step in administering a successful inclusionary zoning program / Brunick, Nick, et al. -- Chicago, IL: Business and Professional People for the Public Interest, 2003, 13 p.

Available full text via the World Wide Web:

<http://www.bpichicago.org/documents/KeepingFor-SaleUnitsAffordableOverTime10.26.04.pdf>

The majority of inclusionary zoning ordinances nationwide include an affordability control period for both rental units and owner-occupied units. These range in time from ten years to perpetuity. Keeping rental units affordable over time rarely presents a challenge; in fact, numerous state and federal financing programs include control periods for rental units produced under the programs. However, communities often lack successful models for keeping for-sale units affordable over time. Resale prices on affordable owner-occupied units can be controlled. Deed restrictions, covenants that run with the land, contractual agreements, and land trust arrangements have all been used successfully in various communities around the country. Examples from Massachusetts, Montgomery County, Maryland, and San Diego, California all provide useful models for keeping for-sale units affordable over time.

INCLUSIONARY HOUSING PUBLICATIONS

LARGE CITIES AND INCLUSIONARY ZONING / Brunick, Nicholas; Goldberg, Lauren; Levine, Susannah -- Chicago, IL: Business and Professional People for the Public Interest, 2003, 15 p.

Available full text via the World Wide Web:

<http://www.bpichicago.org/documents/largecitiesandIZ.pdf>

"Inclusionary zoning has often been viewed as a policy tool for medium-sized cities or relatively affluent east coast counties...For nearly three decades, inclusionary zoning grew in popularity across the country, including over 100 communities in both California and Massachusetts. However, until the late 1990s, no large major U.S. city had adopted a mandatory citywide inclusionary zoning law. Recently, that reality has changed. Large cities such as Boston, Massachusetts; Denver, Colorado; Sacramento, California; San Diego, California; and San Francisco, California, have all adopted mandatory inclusionary zoning laws. This policy brief provides: 1) a summary of the major benefits of inclusionary zoning; 2) a description of some of the unique aspects of the various programs adopted by large cities thus far; and 3) case studies of five large U.S. cities with inclusionary zoning programs" (p. 2).

THE MISSING PIECE TO THE AFFORDABLE HOUSING PUZZLE / Porter, Doug -- Chicago, IL: National Association of Realtors, 2003, 4 p. (Journal article)

On Common Ground – (Winter 2003) p. 28–33

http://www.realtor.org/smart_growth.nsf/Pages/ocg_winter2003_inclusionary_zoning?OpenDocument

Residential construction and housing prices are booming across the nation. But the supply of housing priced to match the incomes of many American households has not kept up with needs. In many metropolitan areas, construction of new housing has not kept pace with job growth and household formation. Construction of multifamily rental housing is far below that of single-family homes. Little housing affordable to low-income people is being built and existing affordable housing is being removed from the inventory by price inflation, demolition and conversion. But housing affordability is an issue that reaches deep into non-poor segments of society as well....For all these reasons, housing affordability is becoming a serious issue in communities across the nation. And with rising concerns, the concept of inclusionary zoning is attracting attention as an effective regulatory approach to producing affordable housing.

ZONING AFFORDABILITY: The challenges of inclusionary housing / Ross, Lynn M - Chicago, IL: American Planning Association, 2003, 6 p. (Newsletter article)

Zoning News (August 2003) p. 1-6

Available full text via the World Wide Web:

<http://www.planning.org/affordablereader/znp/ZN0803.pdf>

"In this era of federal cutbacks, municipalities have been forced to do more with less. The provision of affordable housing is no exception. Localities are relying on a number of tools and programs to ensure that the national epidemic of inadequate affordable housing does not overwhelm their communities. Among them is inclusionary zoning. Inclusionary zoning is not a new tool in the provision of affordable housing— the first such ordinances appeared in the early 1970s in California, Maryland, and Virginia cities. However, in recent years inclusionary zoning has gained popularity across the nation. Cities including Boston, San Francisco, Boulder, San Diego and Santa Fe, New Mexico have adopted programs within the last five years. Although no definitive survey of these programs exists, available literature suggests that today there are between 50 and 100 jurisdictions nationwide with some type of inclusionary housing program" (p. 1).

INCLUSIONARY HOUSING PUBLICATIONS

CITY OF LOS ANGELES INCLUSIONARY HOUSING STUDY / David Paul Rosen and Associates -- Los Angeles, CA: Los Angeles Housing Department, 2002, 324 p.

Available full text via the World Wide Web:

<http://www.ci.la.ca.us/lahd/DRAreprt.pdf>

This report analyzes the potential impact of alternative inclusionary housing requirements and incentives based on how housing actually gets built in Los Angeles today. The cost to build market-rate housing in Los Angeles today was carefully analyzed with the help of a panel of housing developers active in the current Los Angeles market. The study process used a group of for-profit and nonprofit developers to review, revise and validate assumptions about development costs, and to provide assumptions on developer profit and overhead. This collaborative process produced the economic assumptions, development prototypes and incentives used in the study. Ten housing prototypes were developed in conjunction with the developer group, representing typical rental and owner housing currently or prospectively being built in Los Angeles.

INCLUSIONARY HOUSING ORDINANCE SURVIVES CONSTITUTIONAL CHALLENGE IN POST-NOLLAN-DOLAN ERA: Homebuilders Association of Northern California v. City of Napa / Curtin, Daniel J.; Talbert, Cecily T.; Costa, Nadia L -- Chicago, IL: American Planning Association (APA), 2002, 4 p. (Journal article)
Land Use Law and Zoning Digest – Vol. 54, No. 8 (August 2002) p. 3-8

Available full text via the World Wide Web:

<http://www.planning.org/affordablereader/lulzdpel/CommentaryAug2002.pdf>

The commentary discusses judicial treatment of inclusionary housing programs, Napa's inclusionary housing ordinance, and the future of inclusionary housing ordinances. The authors' state: "Inclusionary housing ordinances, such as Napa, are legislative acts entitled to deference in the courts. Therefore, the challenger bears the heavy burden to establish that the law is arbitrary or capricious. If a locality has properly adhered to all procedural requirements in enacting an inclusionary housing ordinance, it will likely pass constitutional muster." The authors conclude by offering guidelines to enhance the legal defensibility of such ordinances.

INCLUSIONARY ZONING: Lessons learned in Massachusetts / Blaesser, Brian, et al. -- Washington, DC: National Housing Conference, 2002, 48 p. (Journal)
NHC Housing Policy Review – Vol. 2, No. 1 (January 2002) p. 1-31

Available full text via the World Wide Web:

http://www.nhc.org/pdf/pub_ahp_01_02.pdf

"This journal, a collaborative effort between the National Housing Conference and the Massachusetts Housing Partnership Fund (MHP), once again explores the issue of inclusionary zoning, but does so this time by reviewing the experiences of select cities and towns in Massachusetts where inclusionary zoning has been used to produce affordable housing. The authors contributing to this issue of NHC Affordable Housing Policy Review were selected for their experience and involvement in the use of inclusionary zoning in Massachusetts and represent some of the best thinkers and practitioners in the state on this subject. They include academics, local program administrators, and housing developers. In offering differing perspectives on this subject, we hope to present a balanced view of the strengths, weaknesses, successes and limitations this approach has had in Massachusetts" (p. vii).

INCLUSIONARY HOUSING PUBLICATIONS

INCLUSIONARY HOUSING: An old tool finds new life / Higgins, Bill -- Sacramento, CA: League of California Cities, 2002, 3 p. (Journal article)
Western City – Vol. 78, No. 11 (November 2002) p. 13-15

Available for purchase via the World Wide Web:

http://www.westerncity.com/index.jsp?displaytype=§ion=art&zone=wcm&sub_sec=art_past

Inclusionary programs generally require developers to include a specified number of housing units (usually a set percentage, between 10 and 20 percent) in their projects that are affordable for families with moderate, low and very low incomes. In return, the developer usually receives a density bonus to build more units than zoning regulations typically would allow. The bonus helps subsidize the cost of the affordable units by allowing more units per parcel of land. In many cases, an in-lieu fee option is also available, which allows the local agency to provide affordable housing in another location.

INCLUSIONARY ZONING: Legal issues / California Affordable Housing Law Project; Western Center on Law & Poverty (WCLP) -- Los Angeles, CA: WCLP, 2002, 40 p.
Available full text via the World Wide Web:

<http://www.wclp.org/files/IZLEGALFINAL.December2002-1.pdf>

“Inclusionary Zoning” as it has come to be known is a local zoning ordinance or land use policy which either mandates or encourages developers of housing to include a specified percentage of housing that is affordable to lower and/or moderate income households. With the price of housing continuing to climb in many parts of California, cities and counties increasingly are establishing inclusionary programs to help provide for the needs of fixed and lower income residents who live or work in their communities. More than 100 communities in California now have some form of inclusionary zoning, and the number is growing rapidly. This report discusses the legal issues and questions that frequently arise when a community considers adopting an inclusionary zoning program.

INCLUSIONARY ZONING: Policy considerations and best practices / California Affordable Housing Law Project; Western Center on Law & Poverty (WCLP) -- Los Angeles, CA: WCLP, 2002, 28 p.

Available full text via the World Wide Web:

<http://www.wclp.org/files/IZBestPracticesFINALDecember2002.pdf>

“Like Napa, many Bay Area governments are taking an active lead to promote the development of housing affordable to lower income families in their communities. Having survived a multi-pronged constitutional attack, the Napa inclusionary zoning ordinance provides an excellent benchmark for determining the critical components of a successful inclusionary program from a legal perspective. Many additional policy considerations must be addressed by local governments, however, in designing an ordinance that will advance their goals to include comparable, affordable homes throughout their communities. This report reviews some of the key features of a successful inclusionary ordinance, discusses several of the policy considerations and issues that need to be addressed in establishing the policy, and offers some recommendations based on a review of many of the ‘Best in the Bay’ inclusionary programs. Throughout the report, we also highlight several (but certainly not all) of the ‘best practices’ different communities have employed to ensure their programs will substantially advance the fundamental goal to produce and maintain affordable homes for lower income families” (p. 1).

INCLUSIONARY HOUSING PUBLICATIONS

IN DEFENSE OF INCLUSIONARY ZONING: Successfully creating affordable housing / Ehrlich Kautz, Barbara -- San Francisco, CA: University of San Francisco School of Law, 2002, 61 p. (Law review article)

University of San Francisco Law Review – Vol. 36, No. 4 (Summer 2002) p. 971-1017

Available full text via the World Wide Web:

<http://www.goldfarbblipman.com/pdf/InclusionaryHousingLawReview.pdf>

“This Comment explores the policy basis for inclusionary housing, the unanswered legal questions, the impact of *City of Napa*, and strategies for drafting a defensible ordinance. Inclusionary zoning remains one of the few mechanisms that local agencies can use to create affordable housing the absence of federal and state housing subsidies. Where it is coupled with a significant density bonus, as in Montgomery County, Maryland, it is a powerful tool to increase both affordability and the overall housing supply. However, even as usually implemented—in middle class-suburban communities more committed to low density than to affordable housing—it acts as a correction to exclusionary land policies that have artificially inflated land and house values and ensures that at least some affordable housing remains in those communities” (p. 1024).

SAN DIEGO ADOPTS INCLUSIONARY HOUSING / Calavita, Nico -- Chicago, IL: American Planning Association, 2002, 1 p. (Journal article)

Planning – Vol. 68, No. 10 (October 2002) p. 32

Available full text via the World Wide Web:

<http://www.planning.org/affordablereader/planning/news1002.htm>

The San Diego approach, when eventually incorporated in an ordinance, will require developers to make 10 percent of their units affordable to a family of four earning less than 100 percent of median income (\$60,100 in San Diego) for ownership units and less than 65 percent of median income (\$39,050) for rental units. In lieu of building these units, developers may pay a fee, which will grow to \$2.50 a square foot after three years, to a city fund that will finance affordable housing for moderate- and low-income people. Two factors explain passage of inclusionary housing in such a conservative city: a housing disaster and a well organized and effective grass roots campaign.

STUDY OF INCLUSIONARY HOUSING INITIATIVES / Minnesota Housing Finance Agency (MHFA) -- St. Paul, MN: MHFA, 2002, 45 p.

Available full text at the World Wide Web:

http://www.mnhousing.gov/idc/groups/secure/documents/admin/mhfa_004334.pdf

The Minnesota Housing Finance Agency (MHFA) convened an Inclusionary Housing Advisory Group that “reviewed inclusionary housing programs around the country and learned about efforts in Minnesota to produce privately developed, mixed-price, mixed-income housing. The Advisory Group reached general consensus on a set of public policy objectives and findings regarding inclusionary housing. The recommendations are MHFA’s. This report is the result of the [MHFA Inclusionary Housing] Advisory Group process. It provides a definition of the concept, based on experience around the country. It provides information on the first and still the best known program, Montgomery County, Maryland. It provides information on programs that have recently been or are in the process of being developed in several cities around the nation. It summarizes the findings of the Advisory Group created to work with the Agency in the conduct of the study. Finally, it provides the recommendations that the Minnesota Housing Finance Agency was directed to present to the 2002 Legislature” (p. 1).

INCLUSIONARY HOUSING PUBLICATIONS

EVERYONE'S VALLEY: Inclusion and affordable housing in Silicon Valley /

Bhargava, Shalini, et al. -- San Jose, CA: Working Partnerships USA, June 2001, 64 p. (Policy Briefs: Silicon Valley Equity Series)

Available full text via the World Wide Web:

http://www.wpusa.org/Focus-Areas/gov_Everyones%20Valley.pdf

This report "provides a comprehensive review of the causes of Silicon Valley's housing crisis and the serious magnitude of its impact on area residents. Through a careful inventory of our region's housing stock, and an analysis of area development and finance policies, employment data, and other indicators, it also offers a prospectus for change. In particular, Everyone's Valley reveals the scale of solutions necessary to make improvements to the situation. In doing so it fills a long-standing vacuum in the discussion of Silicon Valley's escalating housing shortage. This report points out that while our community stands at the crest of the New Economy of high tech information technologies, some of the same market forces that gave rise to Silicon Valley's growth, if unaddressed, could also prompt its decline" (p. 1).

EXPANDING AFFORDABLE HOUSING THROUGH INCLUSIONARY ZONING:

Lessons from the Washington metropolitan area / Brown, Karen Destorel --

Washington, DC: The Brookings Institution, 2001, 42 p.

Available full text via the World Wide Web:

http://www.brookings.edu/~media/Files/rc/reports/2001/10metropolitanpolicy_brown/inclusionary.pdf

"Many jurisdictions are looking for new ways to house not only low-income residents, but also working families who fill critical positions in the labor market. One of the ways in which jurisdictions are meeting this challenge is through inclusionary zoning, a program that principally requires developers to include affordable homes when they build a particular number of market-rate homes. This paper examines the effectiveness of inclusionary zoning programs as tools for not only providing affordable housing, but also ensuring that such housing is built throughout a jurisdiction. Focusing particularly on the Montgomery County, MD ordinance and those found in three other Greater Washington area jurisdictions, this paper will: highlight the effectiveness of inclusionary zoning in several jurisdictions; examine the obstacles facing new and old ordinances alike; and identify where opportunities for change exist to ensure the program's longevity and productivity" (p. vi).

EXPANDING HOUSING OPTIONS THROUGH INCLUSIONARY ZONING / Fischer,

Paul; Patton, Jo -- Chicago, IL: Campaign for Sensible Growth, 2001, 9 p.

Ideas @ Work – Vol. 3 (June 2001) p. 1-9

Available full text via the World Wide Web:

<http://www.growingsensibly.org/cmapdfs/ideasv3.pdf>

"The widespread shortage of affordable housing is prompting some local governments to rethink conventional zoning in order to expand the variety and availability of their housing stock. One innovative tool is inclusionary zoning. This enables local governments to use their zoning powers to foster development of affordable housing by requiring developers to include affordable options when they build market-rate housing" (p. 1).

INCLUSIONARY HOUSING PUBLICATIONS

INCENTIVE ZONING: Meeting urban design and affordable housing objectives / Morris, Marya -- Chicago, IL: American Planning Association, 2000, 64 p. (Book)
(APA Planning Advisory Service Report: No. 494)

Available for purchase via the World Wide Web:

<http://www.planning.org/APAStore/Search/Default.aspx?p=2411>

Incentive zoning has received renewed attention as communities implement smart growth principles into planning and development processes. Incentive zoning allows a developer to build a larger, higher-density project than would be permitted under existing zoning. In exchange, the developer provides something that is in the community's interest that would not otherwise be required (e.g., open space, plazas, arcades, etc.). Report includes bibliographical references and appendices.

INCLUSIONARY ZONING GUIDELINES FOR CITIES & TOWNS / Netter, Edith M. -- Boston, MA: Massachusetts Housing Partnership Fund, 2000, 10 p.

Available full text via the World Wide Web:

http://www.mhp.net/uploads/resources/inclusionary_zoning_guidelines_netter.pdf

Following a May 31, 2000 conference on inclusionary zoning sponsored by the Massachusetts Housing Partnership Fund (MHP), it was clear that Massachusetts communities wanted ongoing guidance on how to draft inclusionary zoning ordinances and by-laws. These guidelines...seeks to assist municipal officials by posing key questions and providing useful answers that address the various steps of drafting, implementing and ensuring maximum benefit from inclusionary zoning. These guidelines are divided into three parts: 1.) What policy questions do you need to consider before you begin work on an ordinance or bylaw?; 2.) What technical issues should you consider before drafting the ordinance or bylaw?; and 3.) What will be required to successfully implement the bylaw/ordinance? Although these guidelines are limited to inclusionary zoning programs, the same questions can be applied to linkage programs, which require or encourage commercial developers to provide fees for affordable housing or to build affordable housing.

INCLUSIONARY ZONING: A viable solution to the affordable housing crisis / Burchell, Robert, et al. / Center for Housing Policy -- Washington, DC: National Housing Conference, 2000, 54 p. (Journal)

New Century Housing – Vol. 1, No. 2 (October 2000) p. 1-54

Available full text via the World Wide Web:

http://www.planningcommunications.com/nhc_inclusionary_zoning_viable_solution.pdf

A National Housing Conference (NHC) report “indicates that over 14 million families in this country have critical housing needs. Three million of those families have at least one head of household working at a level above minimum wage yet these same families find themselves either paying more than fifty percent of their income for housing or living in substandard housing conditions. This journal on inclusionary zoning is a follow up to the NHC report and the articles contained herein are intended to stimulate a continuing dialogue concerning the variety of ways we can, as a nation, meet our affordable housing needs. NHC believes that the time to produce new affordable housing is long past due. Implementation of inclusionary zoning policies such as those in this report, which have been used with great success in Montgomery County, Maryland for over twenty years, is one way to encourage new production of affordable housing” (p. v).

INCLUSIONARY HOUSING PUBLICATIONS

ISSUES TO CONSIDER WHEN CREATING AN INCLUSIONARY HOUSING

ORDINANCE / Chicago, IL: Business and Professional People for the Public Interest, 13 p. (Policy Tools Series)

Available full text via the World Wide Web:

<http://www.bpichicago.org/documents/issuestoconsiderwhencreatingIZ.pdf>

Inclusionary housing programs can effectively create affordable housing in a variety of communities. The most common route to creating an inclusionary housing program is through a zoning ordinance that sets the specific requirements linking the development of new residential units with the creation of affordable housing units. This Policy Tool provides a brief overview of inclusionary housing and a detailed analysis of issues that need to be considered when developing an inclusionary zoning ordinance.

INCLUSIONARY ZONING IN CALIFORNIA: The experience of two decades /

Calavita, Nico ;Grimes, Kenneth -- Chicago, IL: American Planning Association, 1998, 20 p. (Journal article)

Journal of the American Planning Association – Vol. 64, No. 2 (Spring 1998) p. 150-169

Available for purchase via the World Wide Web:

<http://www.informaworld.com/smpp/content~content=a787383710~db=all~order=page>

This “paper presents a case study of Inclusionary Housing (IH), a program that can foster both residential integration and affordable housing. IH in California has evolved in response to, and has adapted to changing economic and political conditions. Survey findings for 75 IH programs show that they have produced more than 24,000 units, provide flexibility to the developers in meeting program requirements, establish affordability terms that are usually met at 30 years or longer, and favor moderate-income home buyers” (p. 150).

INCLUSIONARY HOUSING IN CALIFORNIA AND NEW JERSEY: A comparative

analysis / Calavita, Nico; Grimes, Kenneth; Mallach, Alan -- Washington, DC: Fannie Mae Foundation, 1997, 34 p. (Journal article)

Housing Policy Debate – Vol. 8, No. 1 (1997) p. 109-142

Available full text via the World Wide Web:

http://www.knowledgeplex.org/kp/text_document_summary/scholarly_article/refiles/hpd_0801_calavita.pdf

Many people have argued that inclusionary housing (IH) is a desirable land use strategy to address the lower-income housing needs and to further the geographic dispersal of the lower-income population. In an attempt to evaluate the effectiveness of IH, this article examines the experiences of New Jersey and California, two states where IH has been applied frequently over an extended period. While the concepts of regional “fair share” is central to both states’ experiences, the origins of the programs, their applications, and their evolutions are quite dissimilar. IH originated in New Jersey from the famous *Mount Laurel* cases and in California from housing affordability crises and a legislatively mandated housing element. The experiences of both states indicate that IH can and should be part of an overall affordable housing strategy that it is unlikely to become the core of such a strategy.



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(510) 642-1472; <http://www.lib.berkeley.edu/>*

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