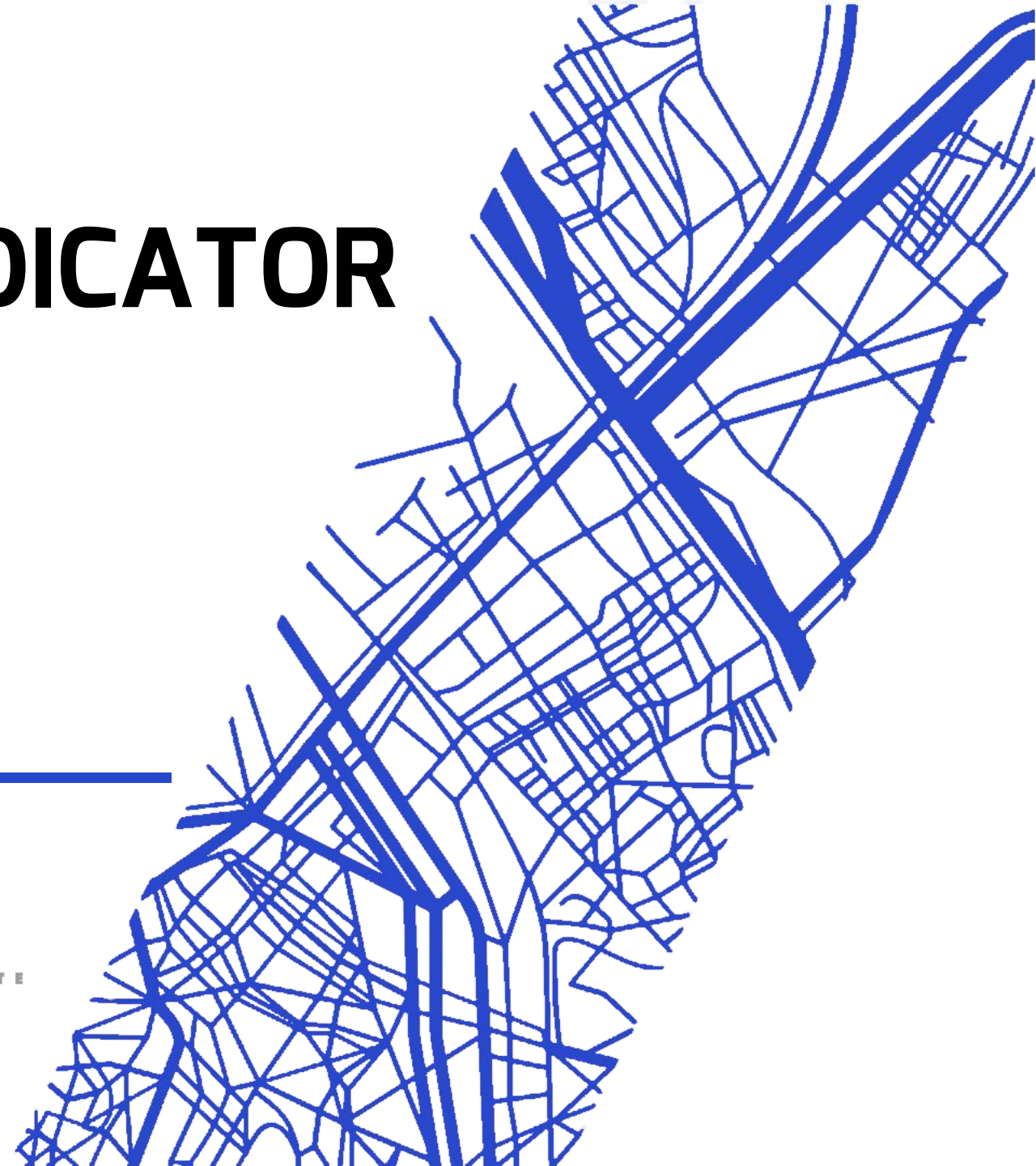
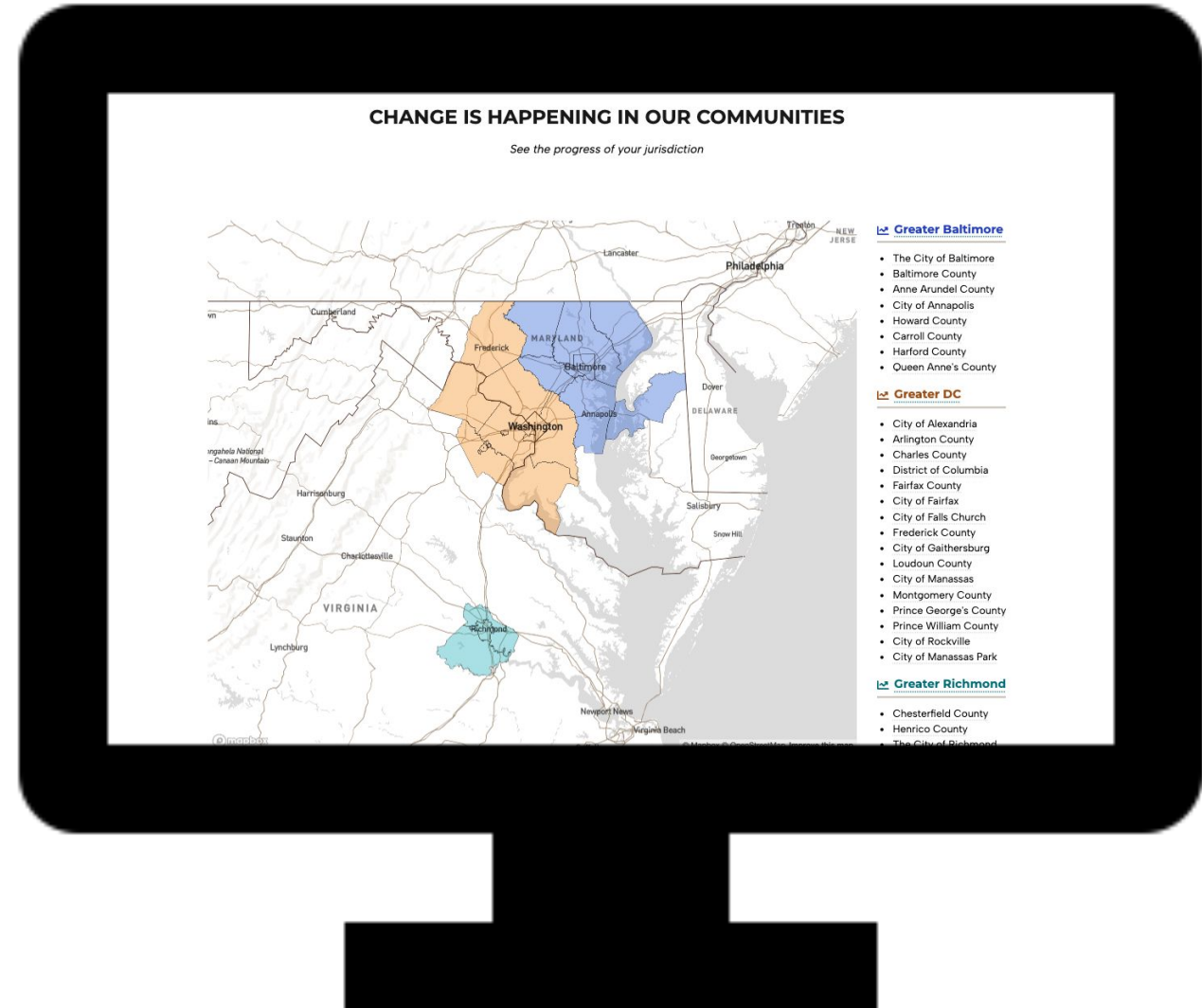


THE HOUSING INDICATOR TOOL 6.0



THE HOUSING INDICATOR TOOL

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



WHERE IT BEGAN

RESEARCH REPORT

Meeting the Washington Region's Future Housing Needs

A Framework for Regional Deliberations



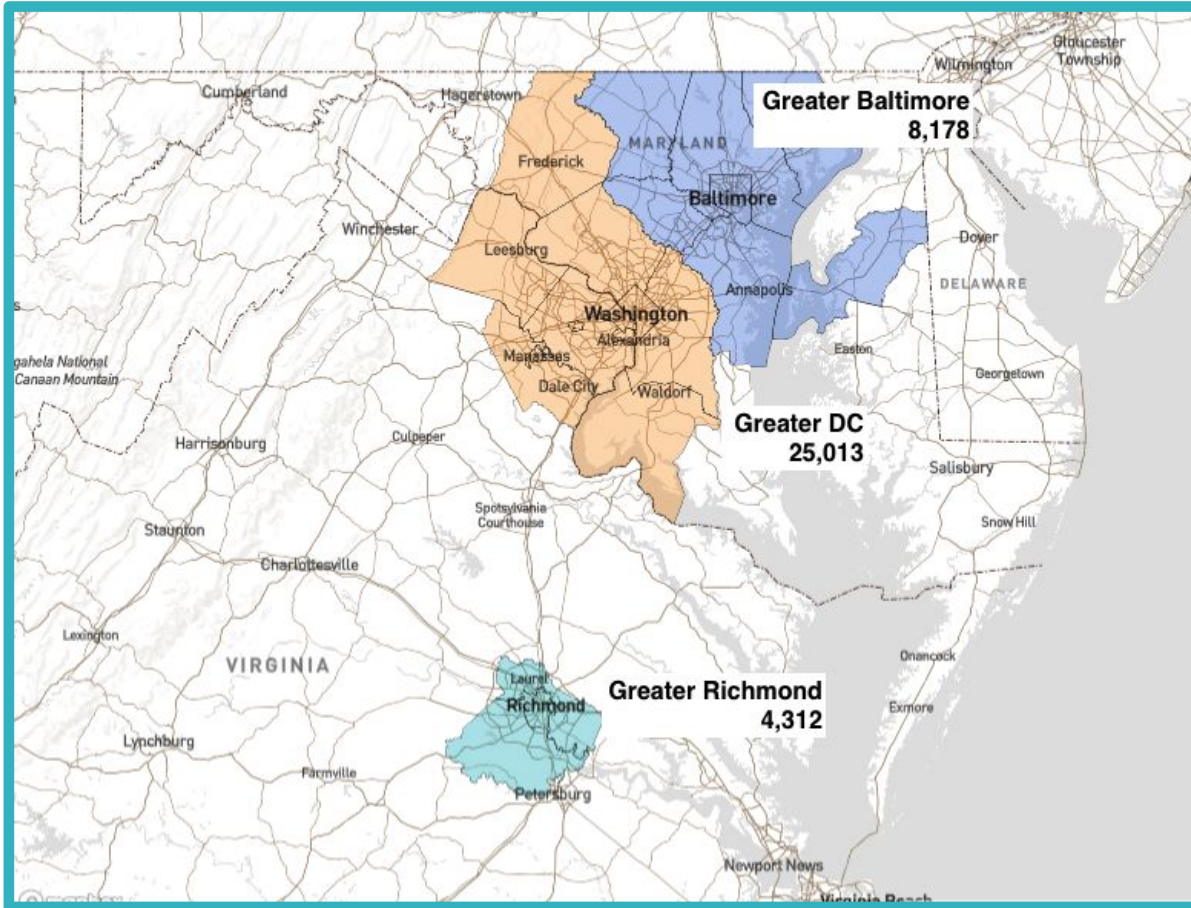
Metropolitan Washington
Council of Governments

Needed between 2015 and 2030 in Metropolitan Washington:

374,000
net new housing units

77%
affordable

WHERE WE ARE NOW



Net new housing units
needed annually

- **Expanded Reach:**

- *Greater DC*
- *Greater Baltimore*
- *Greater Richmond*
- *Maryland*
- *Virginia*

- **Granular Goals:**

- *Annual*
- *Regional*
- *Jurisdictional*

LEVERAGING THE HIT

Understand

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


Advocate

- *Which policies is my jurisdiction missing?*

Educate

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

 Preserve

 Produce

 Protect

- ▶ Inclusionary housing
- ▶ Housing Trust Fund with consistent, dedicated local revenue source
- ▶ Property tax, impact fee, tax or fee abatements or exemptions for rental projects with affordable units
- ▶ Prioritize making publicly-owned land available for affordable housing
- ▶ Zoning promotes housing variety
- ▶ Facilitates multifamily development
- ▶ Maximize transit-oriented development
- ▶ No required parking minimums
- ▶ Single-stair reform for buildings up to 6 stories

COMPONENTS OF THE HIT

Landing Page

WE KNOW THE BARRIERS—

HOW DO WE DELIVER AFFORDABLE HOUSING AT THE SCALE OUR REGION NEEDS?

The HIT is a platform that tracks local jurisdictions' housing production and preservation in the Capital Region to help stakeholders create paths for removing obstacles to opportunity and supporting housing stability.

[Greater Baltimore](#)

[Maryland](#)

[Greater DC](#)

[Greater Richmond](#)

[Virginia](#)

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



- *Introduction*
- *Historical Context*
- *Who can live here?*
- *Needed policies*
- *Our communities*
- *Make a Difference*

COMPONENTS OF THE HIT

Regional Dashboards

[← \[Home\]](#)

GREATER DC

Fast Facts:

- Greater DC was home to 5,826,765 people and had 2,319,753 housing units in 2024. Since 2010, Greater DC has added an average of 54,700 people and 21,700 housing units per year.
- Thirty-eight percent of households were renters and 48 percent of renters had unaffordable housing costs.
- Greater DC did not meet the annual production target of 25,013 units, with 23,614 new units built in 2025. Cumulatively, Greater DC has produced at least 159,943 units since 2019, short of its 7-year target of 175,091.
- Greater DC includes the District of Columbia; Charles, Frederick, Montgomery, and Prince George's counties and the cities of Gaithersburg and Rockville in Maryland; Arlington, Fairfax, Loudoun, and Prince William counties and the cities of Fairfax, Falls Church, Manassas, and Manassas Park in Virginia. All jurisdictions share data for the HIT.

Sources: Census Population and Housing Unit Estimates, Decennial Census, American Community Survey (2020–24), and the HIT survey of local jurisdictions.

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- *Policy Status*
- *Housing Outcomes*

COMPONENTS OF THE HIT–Jurisdictional Dashboards

ARLINGTON COUNTY

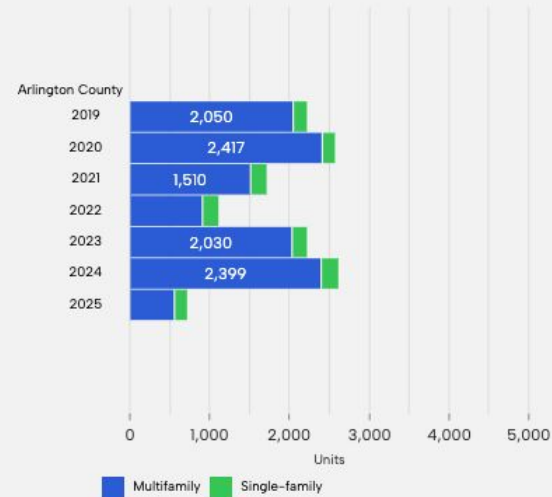
Fast Facts:

- Arlington was home to 239,807 people and had 124,873 housing units in 2024. Since 2010, Arlington has added an average of 2,300 people and 1,400 housing units per year.
- Fifty-nine percent of households were renters and 40 percent of renters had unaffordable housing costs.
- Arlington did not meet the annual production target of 1,393 units, with 724 new units built in 2025. Cumulatively, Arlington has produced at least 13,249 units since 2019, exceeding its 7-year target of 9,751.
- Arlington has not adopted the 2030 COG housing targets but has [established a local goal](#) for 17.7% of rental housing stock to be affordable at 60% of AMI or less and 28.4% of new ownership stock to be affordable between 80–120% of AMI by 2040.
- [Visit Arlington's Affordable Housing Dashboard.](#)

Sources: Census Population and Housing Unit Estimates, Decennial Census, American Community Survey (2020–24), and the HIT survey of local jurisdictions.

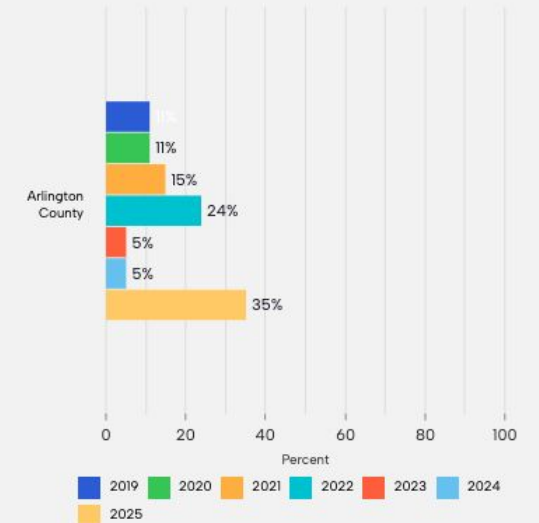
Amount of Housing

Number of units built by type



Affordability of Housing

Share of units affordable to households with low incomes



COMPONENTS OF THE HIT

Who Can Afford to Live in the Region?

Greater Baltimore

Greater DC

Greater Richmond

Monthly Housing Cost

\$2,800



CEO

Married, 1 child



Accountant

Married, 4 children



Software developer

Single



Graphic designer

Married, 1 child



Pharmacist

Single



Plumber

Married



Mental health counselor

Married



Registered Nurse

Single



Retired

Single



Postal service mail carrier

Married

COMPONENTS OF THE HIT

Policy Toolkit

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



- ▶ **Inclusionary housing**
- ▶ **Housing Trust Fund with consistent, dedicated local revenue source**
- ▶ **Property tax, impact fee, tax or fee abatements or exemptions for rental projects with affordable units**
- ▶ **Prioritize making publicly-owned land available for affordable housing**
- ▼ **Zoning promotes housing variety**

Residential zoning that allows for a wide range of housing types ensures people of various ages, incomes, and cultural preferences can live in a jurisdiction. Promoting variety means jurisdictions have zoning that allows for duplexes, quadplexes, middle-density multiplexes, and larger multifamily developments on at least 25 percent of residential land. This flexibility enables developers to produce more housing with the same fixed costs, increasing the affordability and variety of new units.
- ▶ **Facilitates multifamily development**
- ▶ **Maximize transit-oriented development**
- ▶ **No required parking minimums**
- ▶ **Single-stair reform for buildings up to 6 stories**



Inclusionary Housing

- City of Alexandria
- Arlington County
- Charles County
- District of Columbia
- Fairfax County
- City of Fairfax
- City of Falls Church
- Frederick County
- City of Gaithersburg
- Loudoun County
- Montgomery County
- Prince George's County
- Prince William County
- City of Rockville
- City of Manassas Park

Housing Trust Fund

- City of Alexandria
- District of Columbia
- City of Falls Church
- Montgomery County
- Prince George's County

Tax or Fee Exemptions

- City of Alexandria
- Arlington County
- Charles County
- District of Columbia
- City of Falls Church
- Frederick County
- City of Gaithersburg
- Loudoun County
- City of Manassas
- Montgomery County
- Prince George's County
- City of Rockville

Public Land

- City of Alexandria
- Arlington County
- District of Columbia
- Fairfax County
- Frederick County
- City of Manassas
- Montgomery County
- Prince George's County

COMPONENTS OF THE HIT—Calls to Action

- *Real Estate Developers*
- *Advocates & Community Members*
- *Non-Profits & Institutions*
- *Property Managers*
- *Service Providers*
- *Philanthropy*
- *Lenders & Financiers*
- *Public Sector*
- *Law Firms & Legal Services*
- *Private Sector*
- *Policy Think Tanks*
- *Institutions of Higher Learning*
- *Faith-Based Institutions*
- *Employers*
- *Healthcare*
- *Tech*



REAL ESTATE DEVELOPERS

Deliver housing at scale

- Build mixed-income and affordable housing, particularly in high-opportunity areas
- Partner with and invest in emerging and BIPOC developers
- Incorporate innovative models (co-location, adaptive reuse, mixed-use) to maximize supply
- Use HIT benchmarks to align production with regional housing needs and affordability gaps



ADVOCATES & COMMUNITY MEMBERS

Build public will and accountability

- Advocate for policies that increase housing supply and reduce barriers (e.g., zoning reform, density)
- Use HIT data to track local progress and hold jurisdictions accountable
- Partner with developers and policymakers to advance community-informed solutions
- Engage diverse stakeholders to reduce opposition and build support for housing development



NON-PROFIT ORGANIZATIONS & INSTITUTIONS

Convene, implement, and scale solutions

- Serve as anchor institutions by leveraging land and partnerships for housing development
- Translate community needs into actionable development and policy strategies
- Advance racial equity by embedding inclusive practices across programs and partnerships
- Align programming and advocacy with HIT targets to drive measurable outcomes



PROPERTY MANAGERS

Ensure long-term housing stability

- Maintain strong communication with residents and service providers to improve outcomes
- Integrate resident-centered practices into operations
- Share operational insights with developers to inform future projects
- Support preservation efforts by stabilizing at-risk properties



SERVICE PROVIDERS

Strengthen housing stability and outcomes

- Deliver services (financial coaching, health, education) that improve resident stability
- Advocate for increased funding for supportive services tied to housing
- Partner with property managers and developers to integrate holistic service models



PHILANTHROPY

Catalyze innovation and close funding gaps

- Provide flexible, catalytic capital for preservation and development
- Fund pilot programs and scalable models aligned with HIT priorities
- Support advocacy and capacity-building efforts across the ecosystem
- Use funding to de-risk projects and unlock additional investment

EVOLUTION OF THE HIT

HIT 1.0

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

HIT 2.0

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

HIT 3.0

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

HIT 4.0

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

HIT 5.0

- New zoning policies
- Additional Richmond data

HIT 6.0

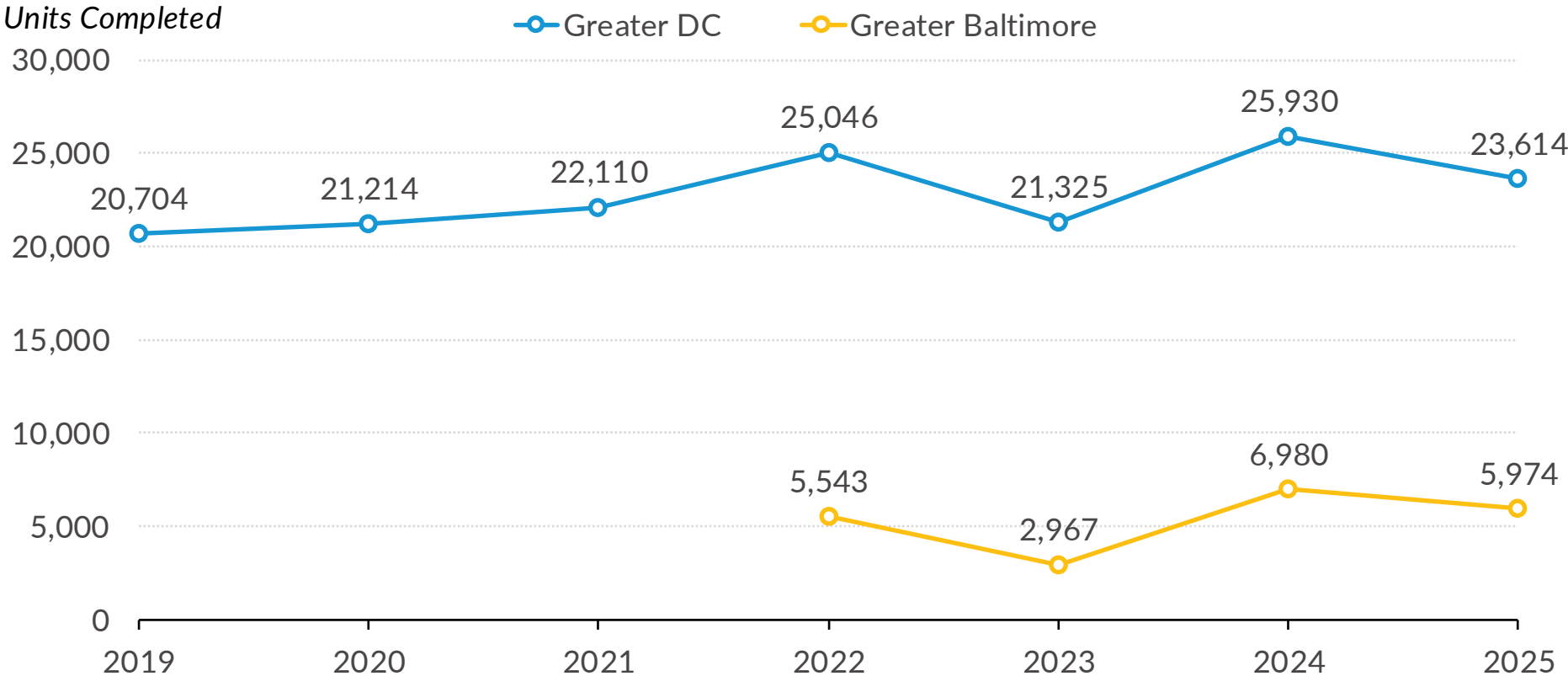
- Three new policies
- Maryland and Virginia Dashboards

HIT 6.0

2025 Results from the HIT Survey

Overall housing production decreased from 2024-2025

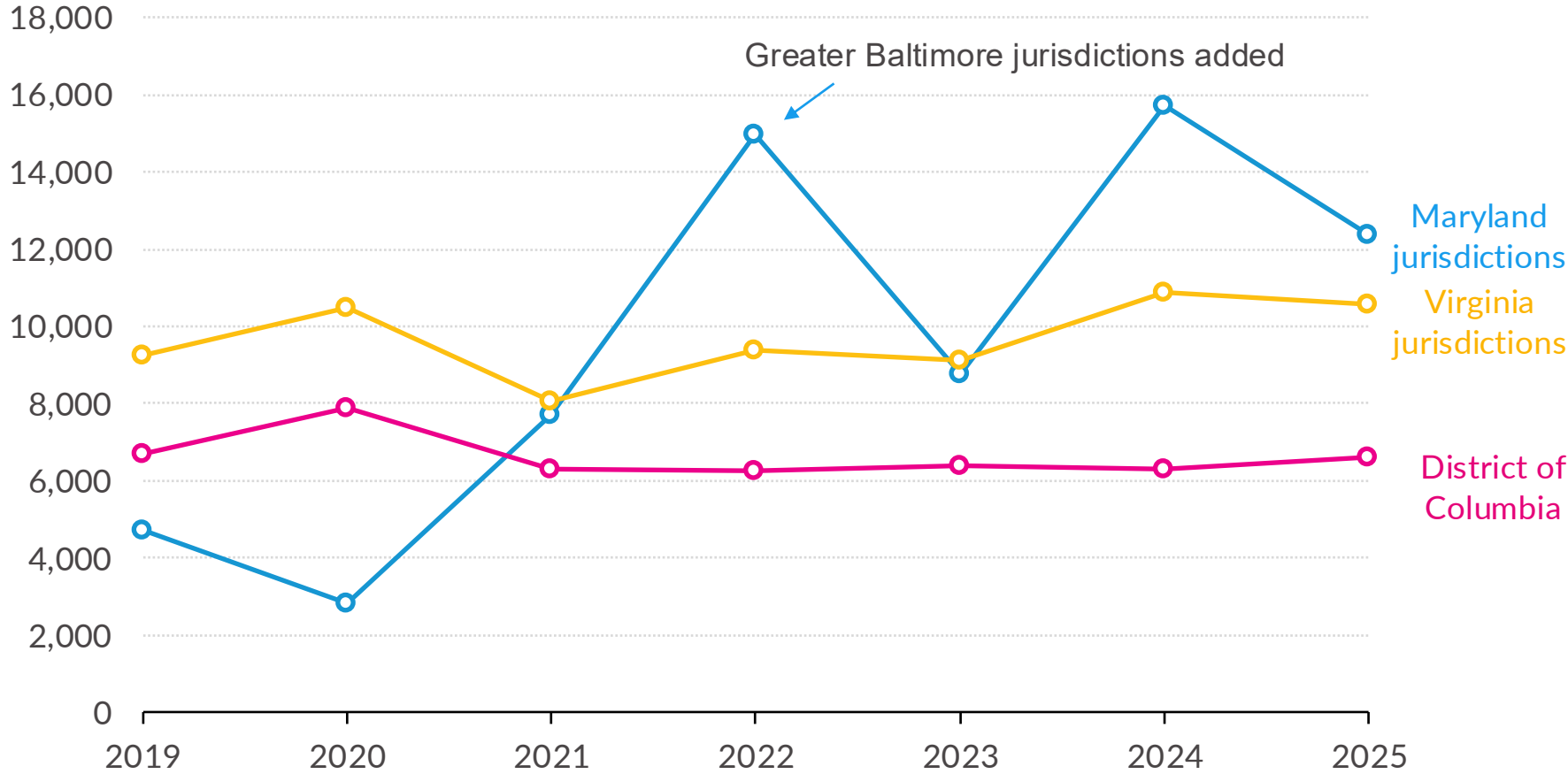
Total New Housing Units Completed by Region, 2019-2025



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

26% of new units reported in HIT built in DC; 37% each in Maryland and Virginia jurisdictions

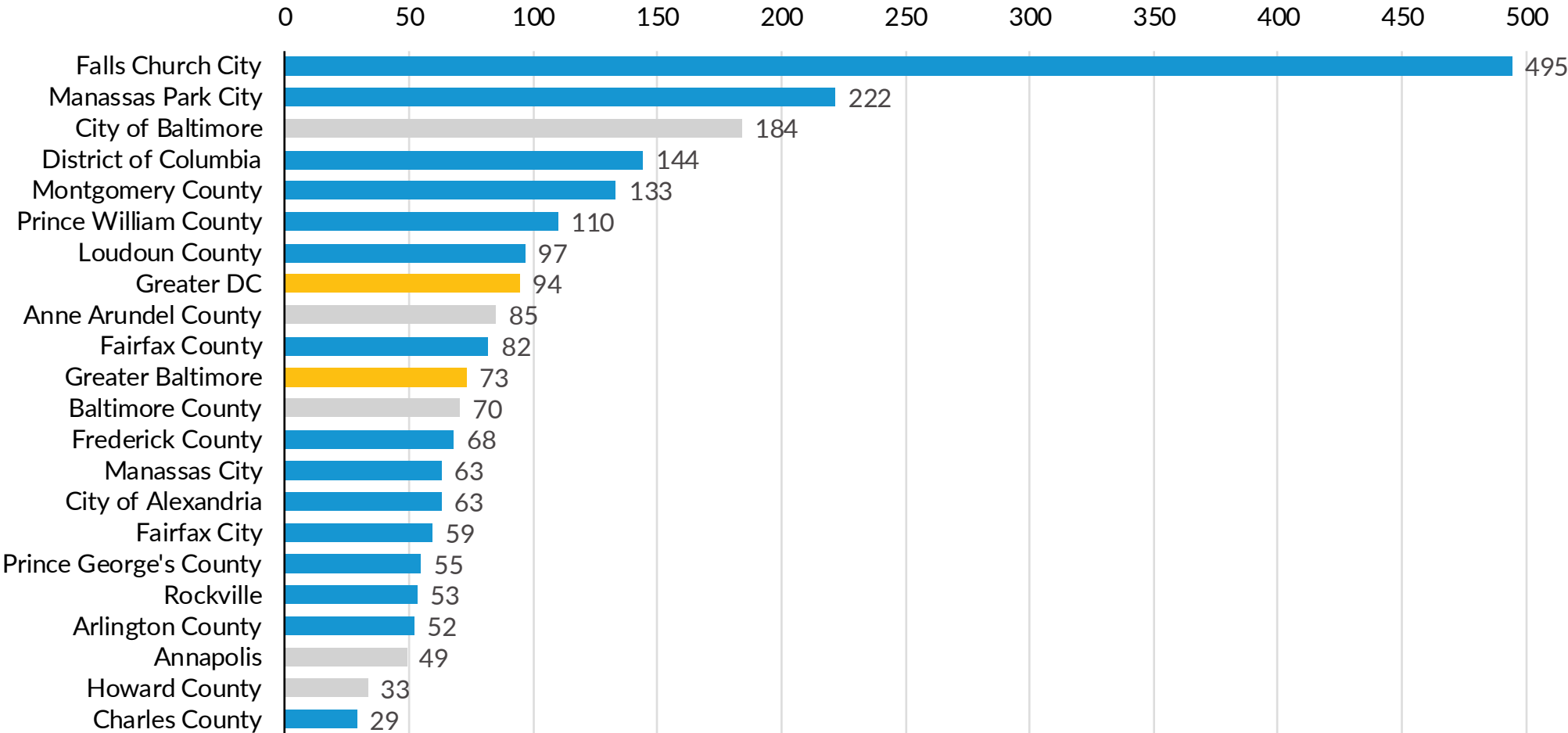
Total New Housing Units Completed by State, 2019-2025



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

8 jurisdictions produced at least 85% of annual unit goal

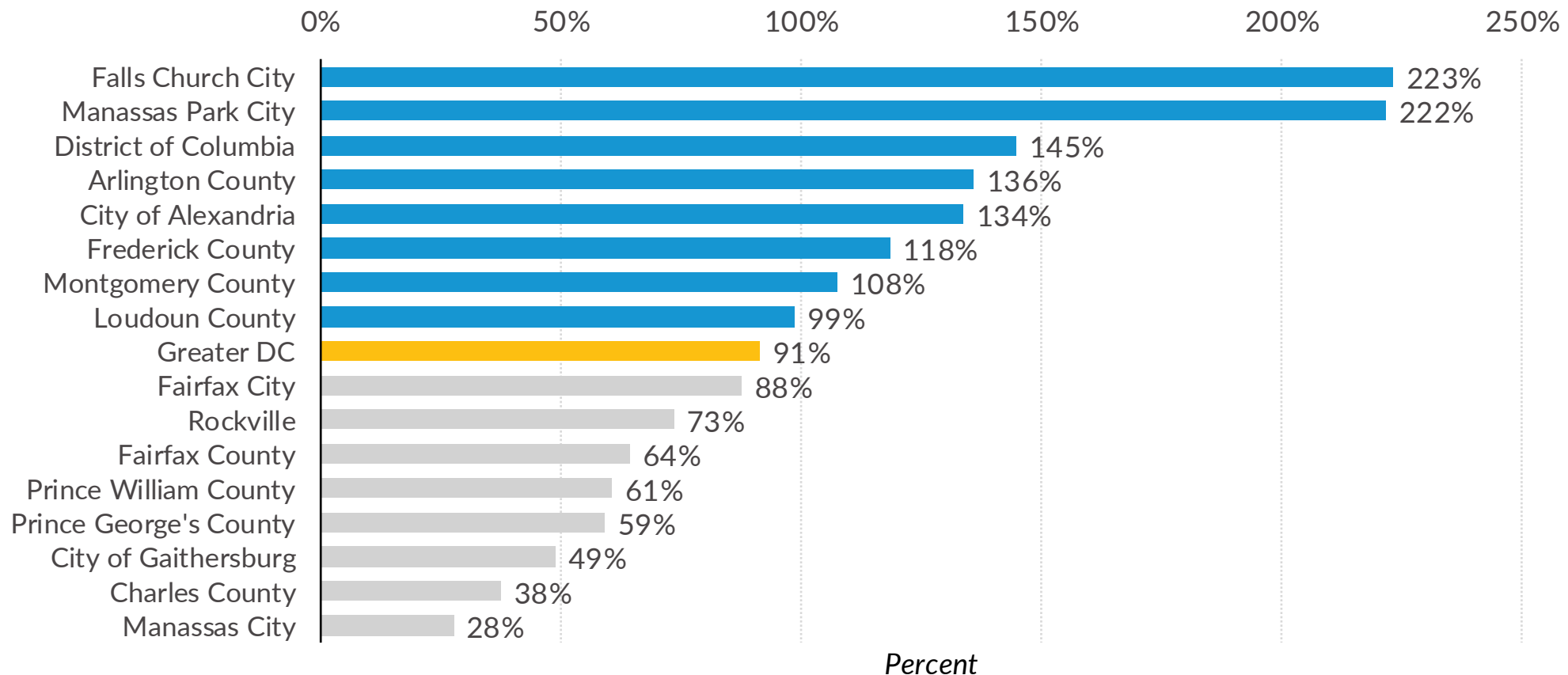
New Units as a Percent of Estimated Annual Unit Goal by Jurisdiction, 2025



Percent

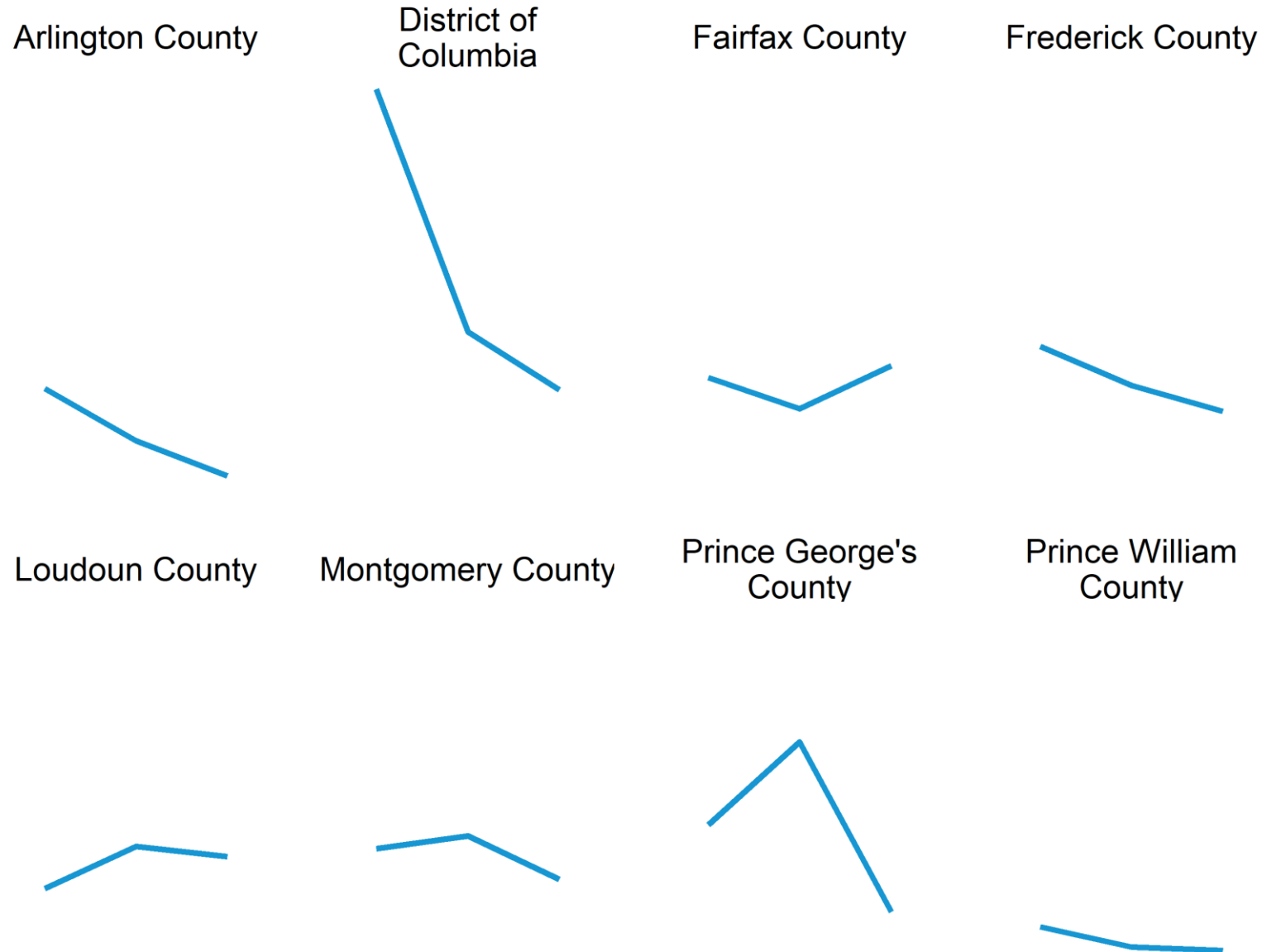
7 jurisdictions exceeded cumulative production targets with 5 increasing % of target met

Total Housing Units Completed as a Percent of Target, Greater DC Area, 2019-25



Overall downward trends in number of units permitted

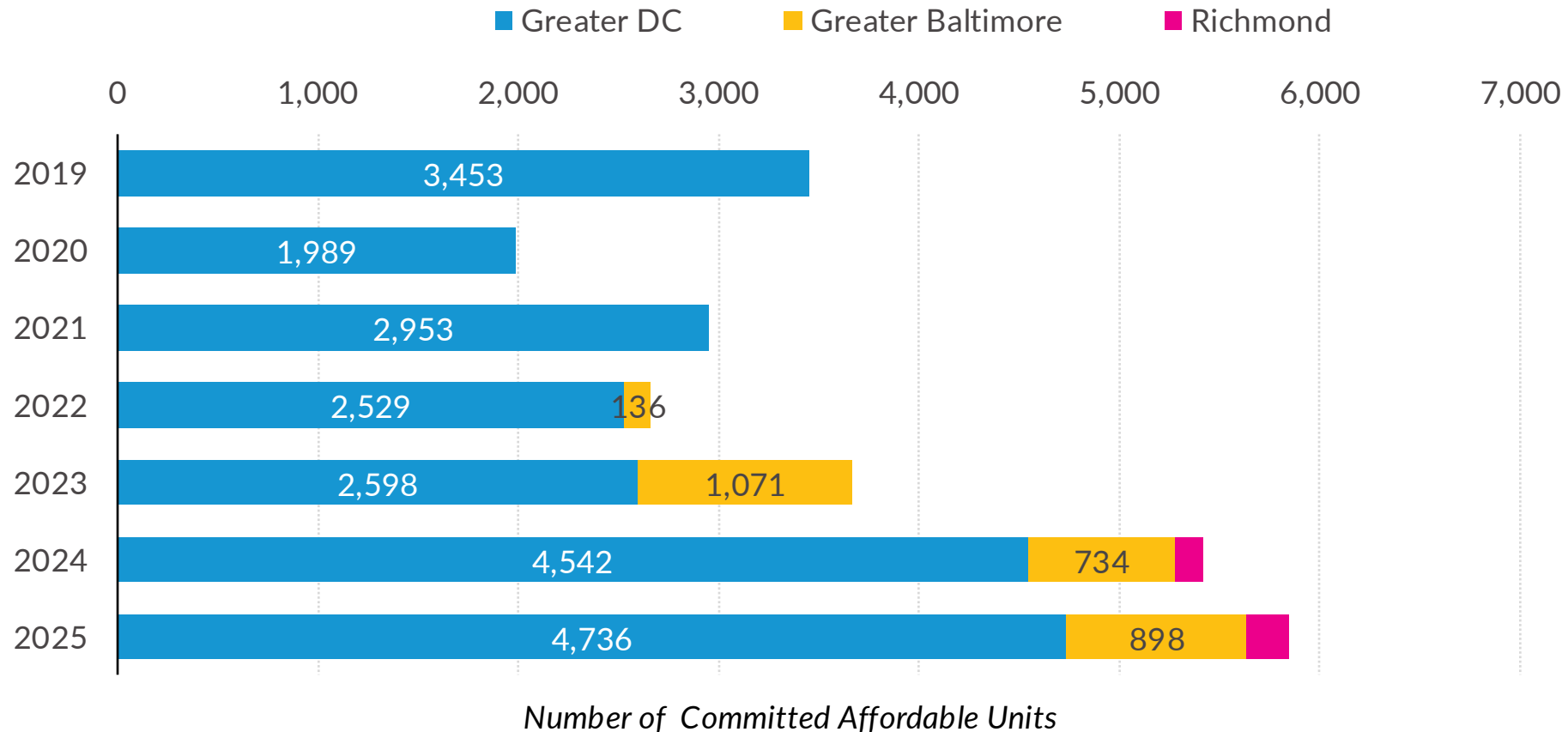
Rolling 2-Year Averages for Number of Units Permitted, 2022-2025



Note: Eight jurisdictions with the largest volume permitted are included here.
Source: HIT Survey of Local Jurisdictions

The Capital Region added more affordable units in 2025 than in the past

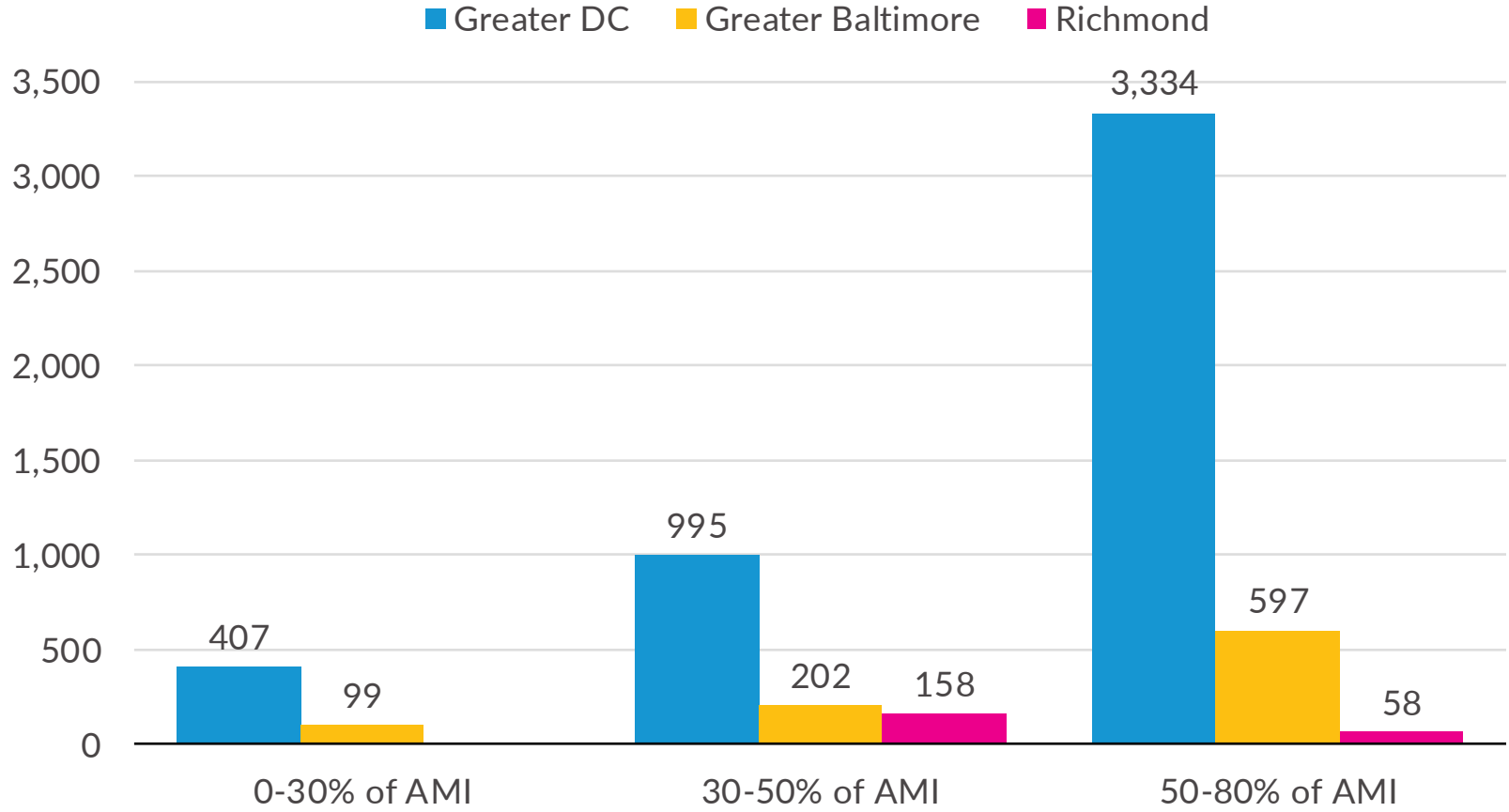
New Committed Affordable Units, 2019-25



Source: HIT survey of local jurisdictions.

Most new affordable units serve households with incomes 50-80% of AMI; only 9% are deeply affordable

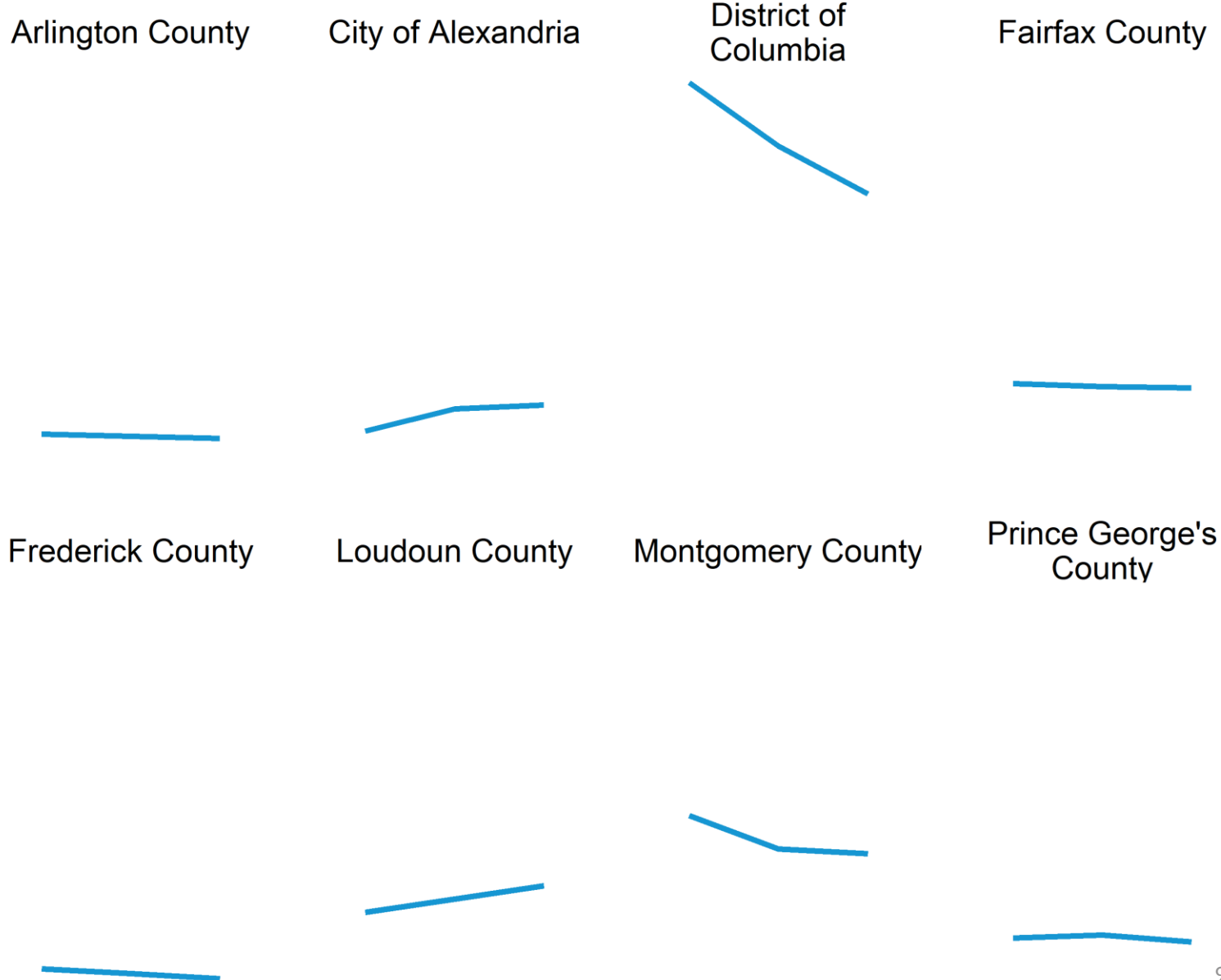
Number of new committed affordable units by affordability level, 2025



Note: 31 units in Greater DC, 68 units in Greater Baltimore, and 86 units in Richmond were set aside for permanent supportive housing.
Source: HIT survey of local jurisdictions.

Jurisdictions have mixed trends for affordable development pipeline

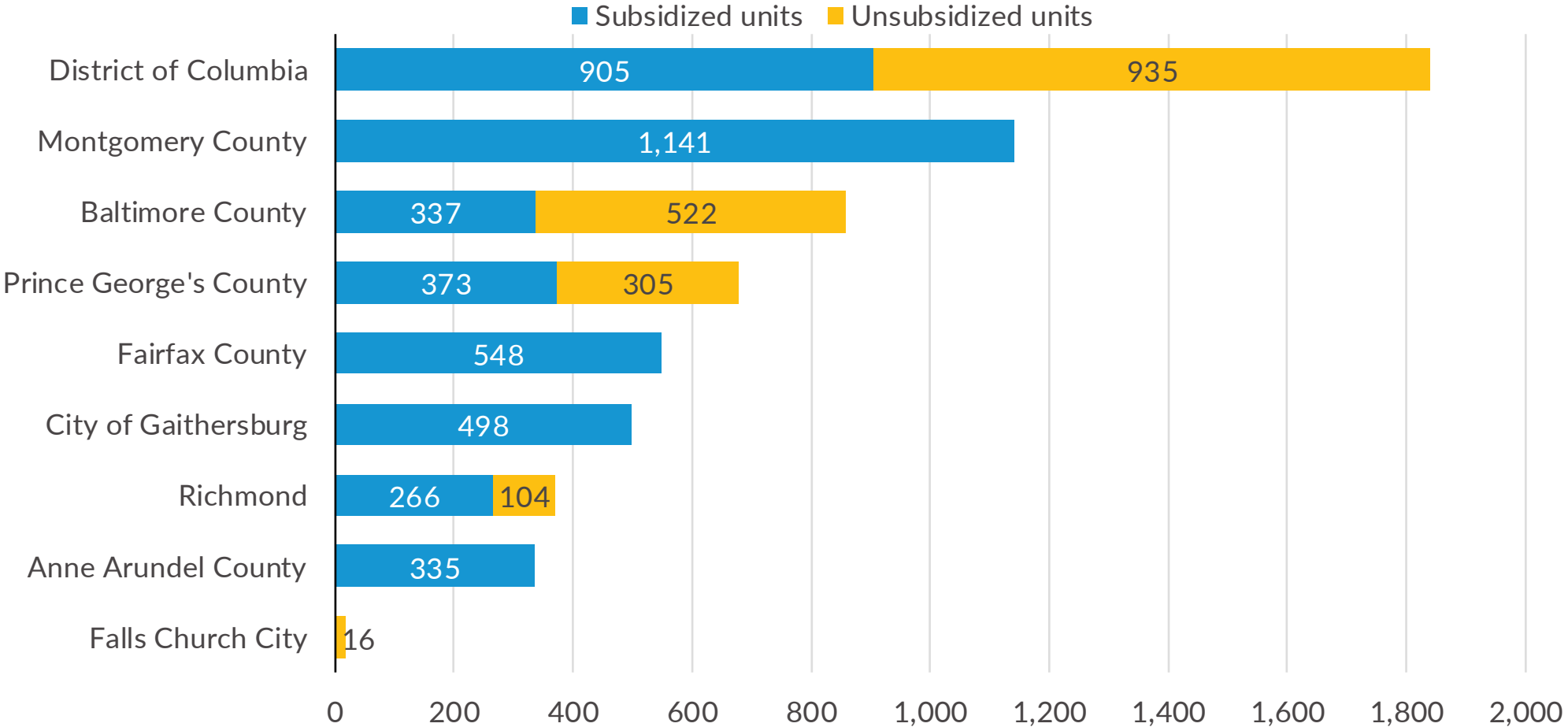
Rolling 2-Year Averages for Affordable Units in Pipeline or Under Construction, 2022-2025



Note: Eight jurisdictions with the largest volume and no missing data are included.
Source: HIT Survey of Local Jurisdictions

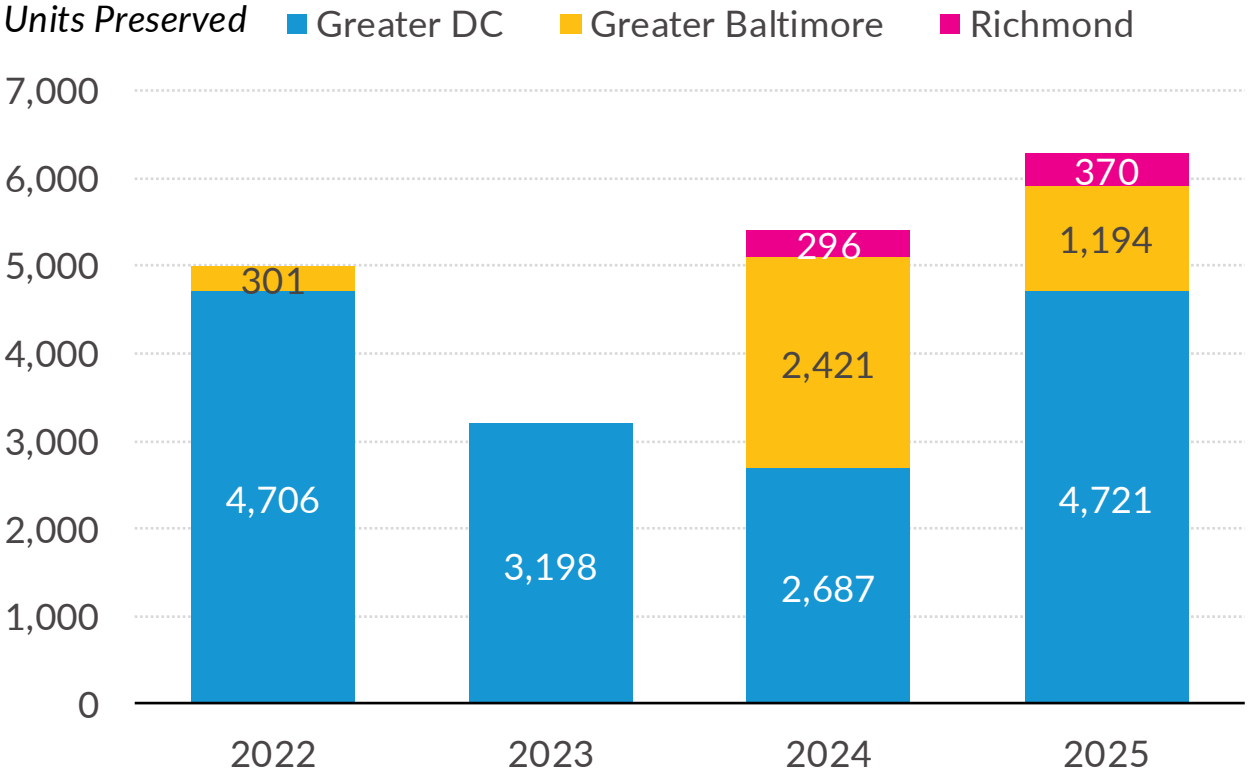
Nearly 6,300 units were reported as preserved in 2025

Number of affordable units that were preserved by type, 2025



Nearly 20,000 affordable units have been preserved since 2022

Number of affordable units that were preserved, 2022-25

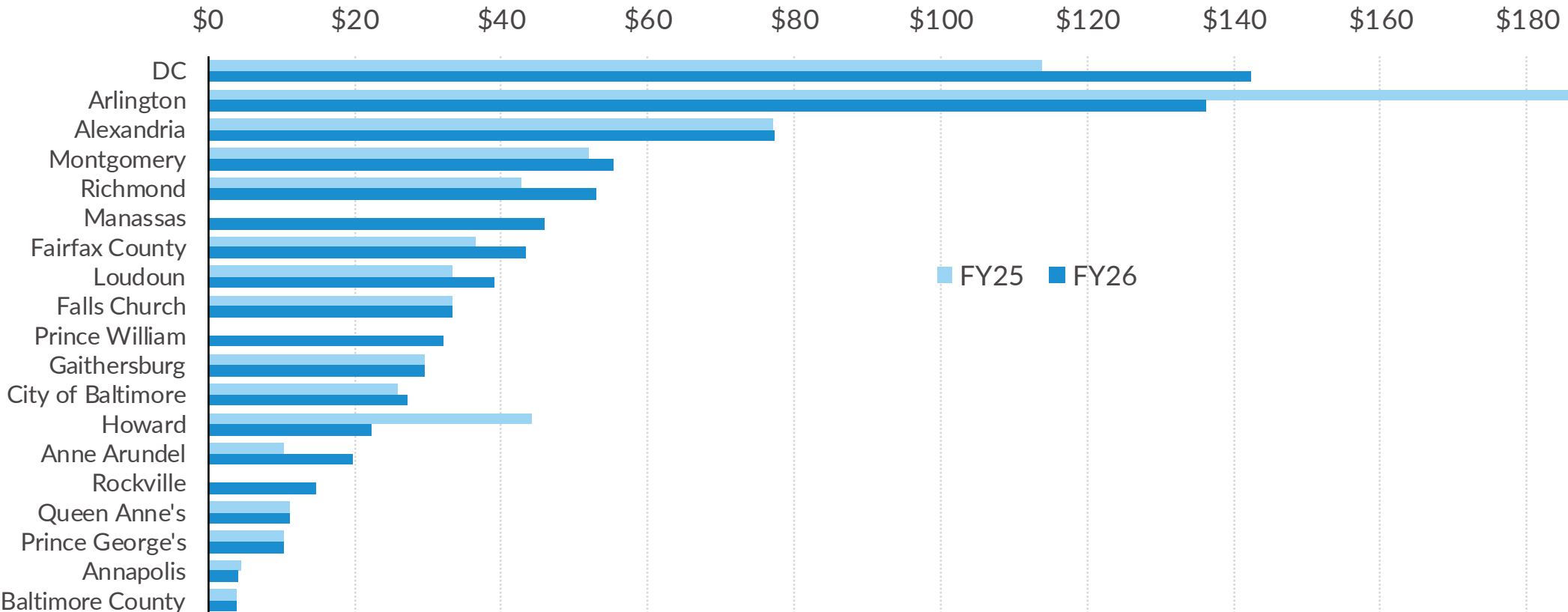


Meeting the region’s housing needs requires policies to preserve, produce, protect

Category	Policy	All (n=23)
Protect	Locally-funded emergency rental assistance	15
Produce	Prioritize Public Land	14
Preserve	Right of First Refusal	12
Preserve	Preservation Inventory - Subsidized	11
Produce	Housing Trust Fund (dedicated revenue)	9
Protect	Locally-funded vouchers	8
Protect	Accessible Production Tracking	5
Preserve	Preservation Inventory – Unsubsidized	4
Produce	Single Stair Reform	1

Local investment in housing trust funds varies considerably, DC and Arlington at the top

Per Capita Reported Budget Allocation in Housing Trust Funds, FY2025-FY2026

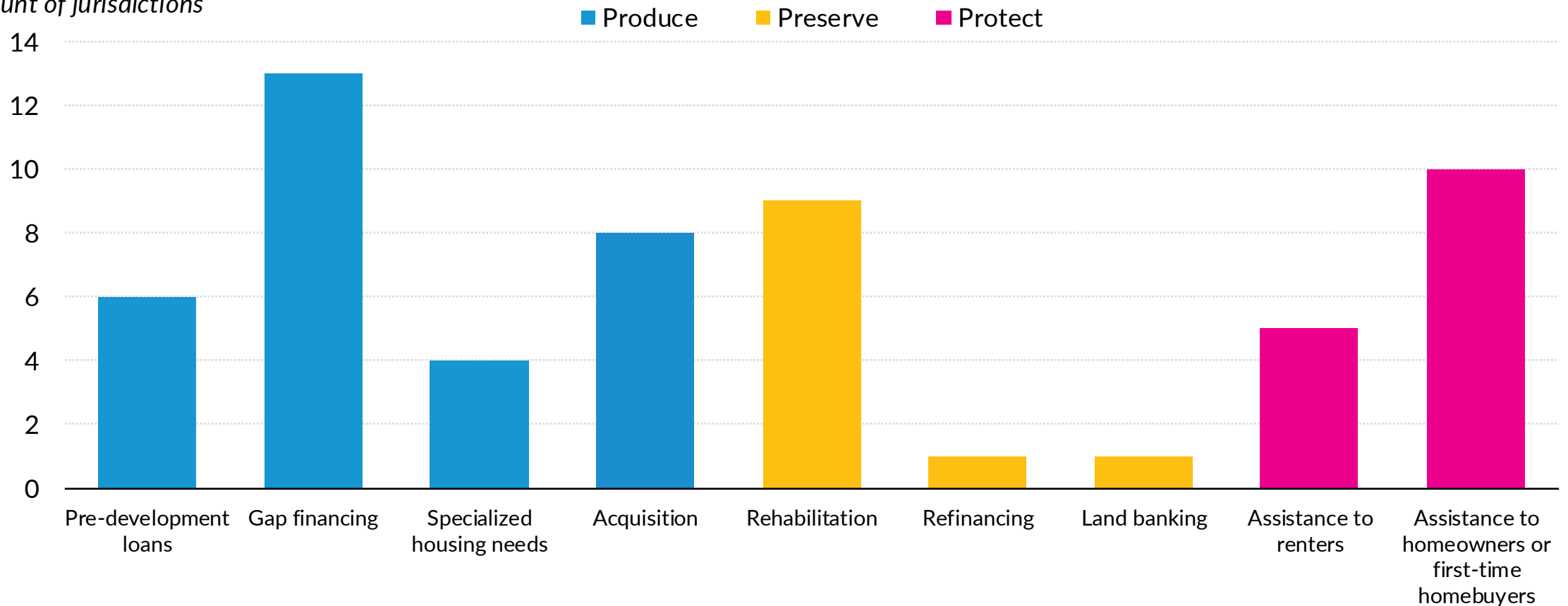


Housing Fund (\$) per Capita

Jurisdictions use local housing trust funds in multiple ways to produce, preserve, and protect

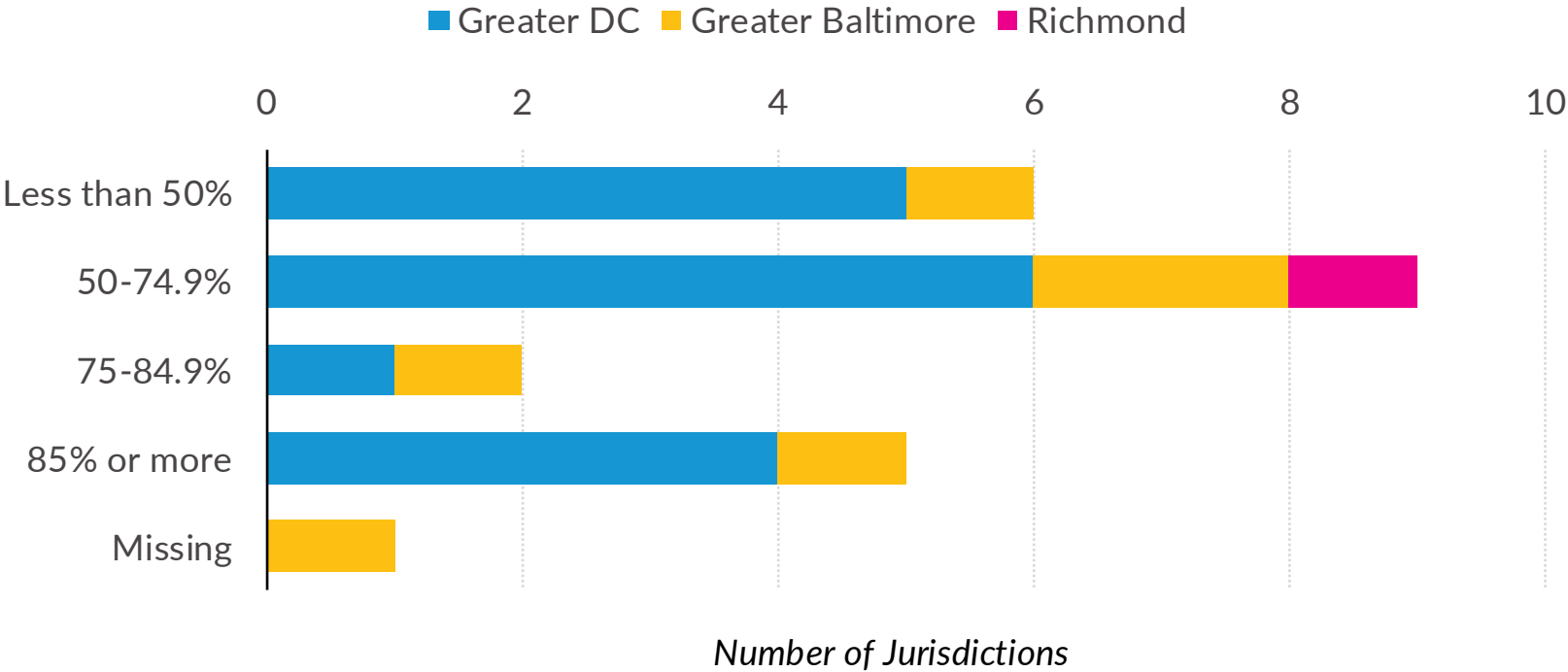
Reported uses of local housing trust funds

Count of jurisdictions



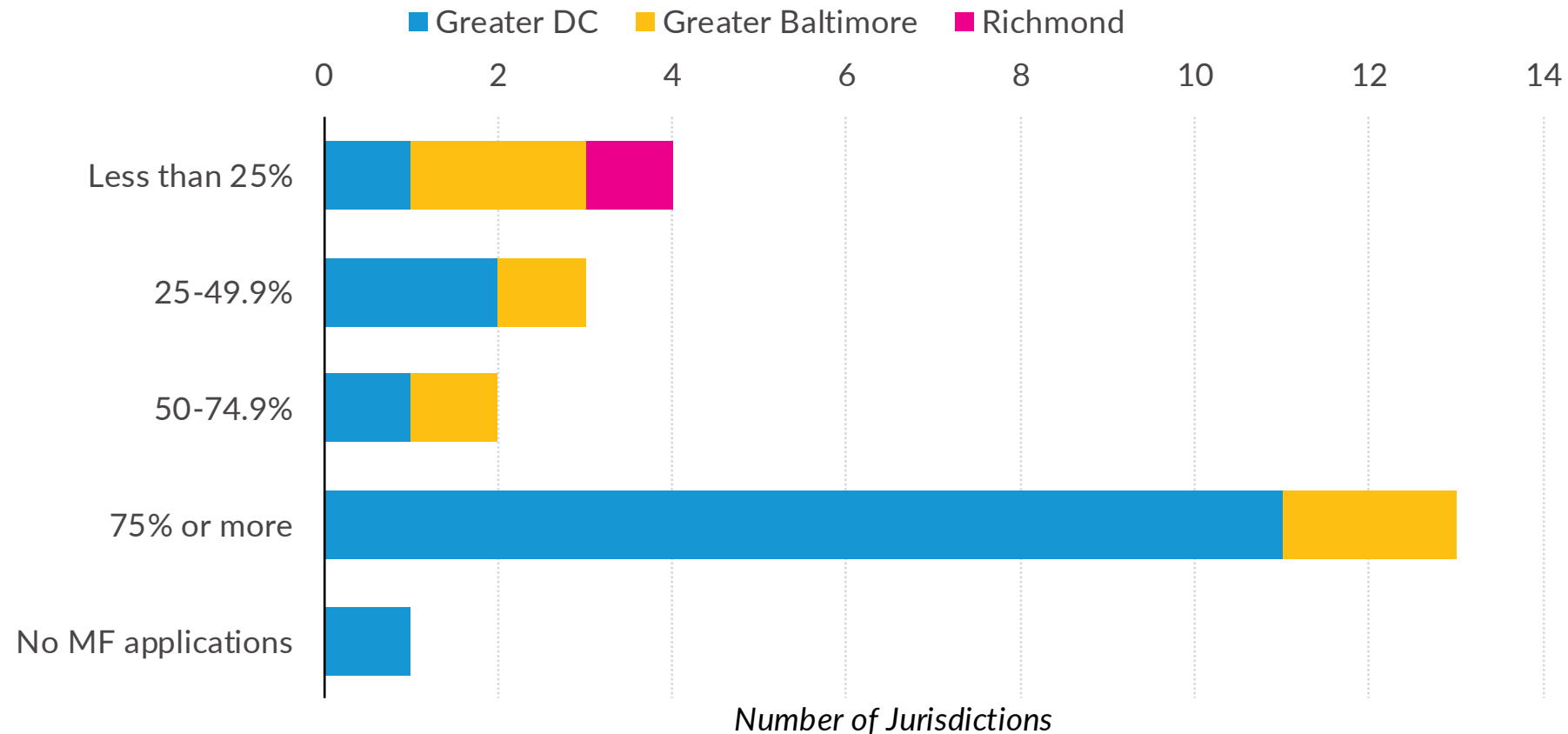
15 jurisdictions have zoning that allows housing variety

Share of Residential Land Zoned for Only Single-Family Housing



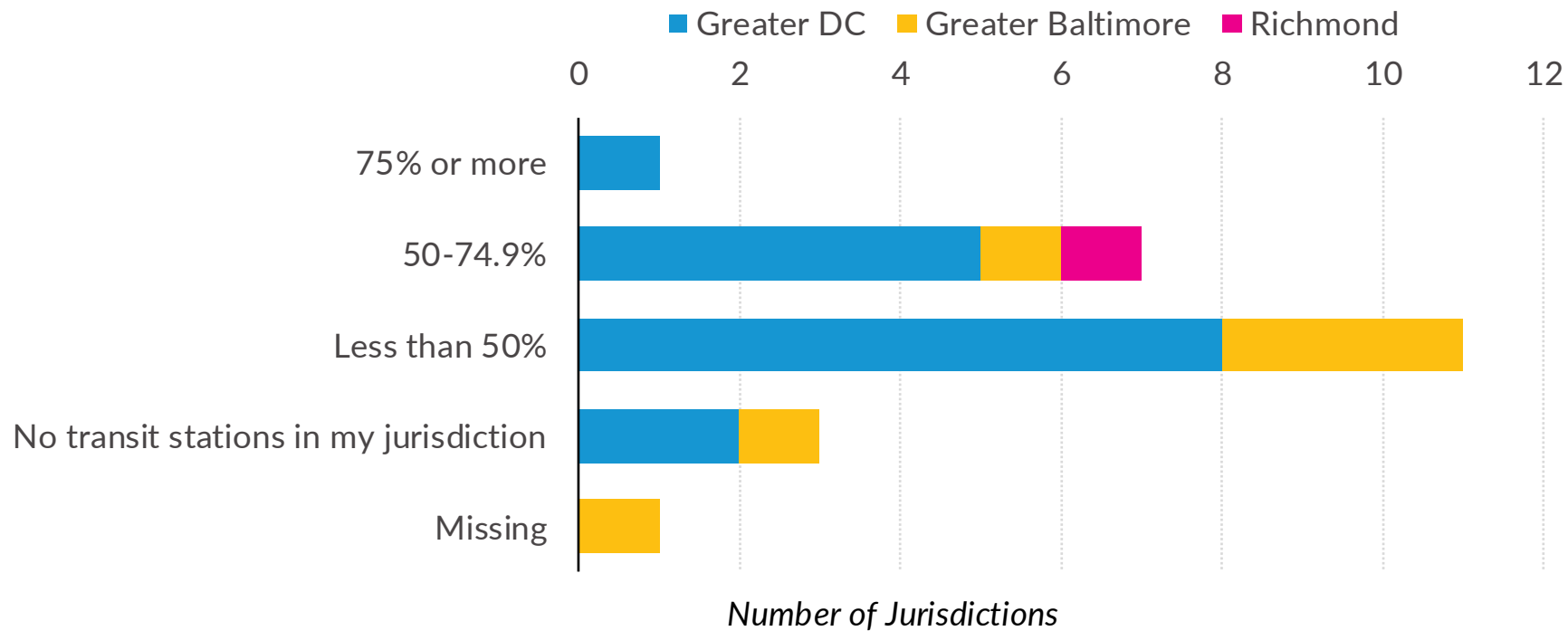
7 jurisdictions are doing more to facilitate multifamily development

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



8 jurisdictions are maximizing transit-oriented development

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



2 jurisdictions have no parking minimums, more reduce requirements near transit or for affordable housing

Number of Jurisdictions with No Parking Minimums or Reducing Requirements

