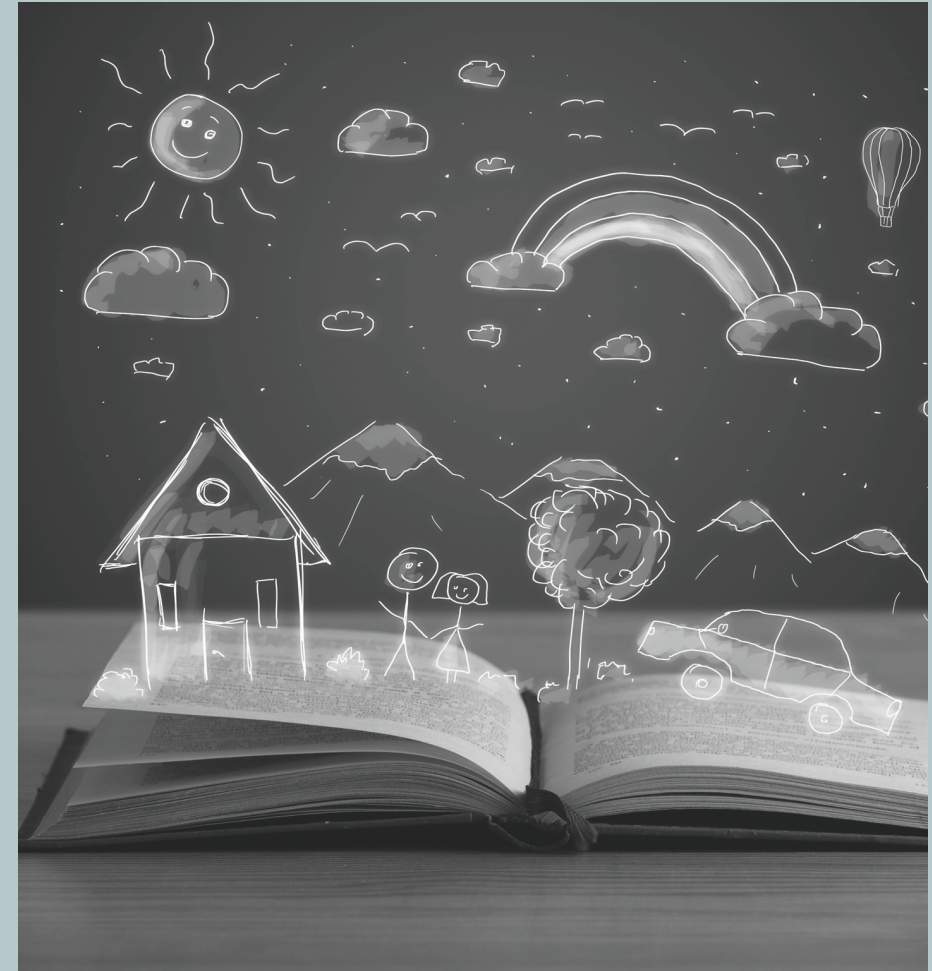


REGIONAL HOUSING NEEDS ASSESSMENT: UPDATE AND NEXT STEPS

AUGUST 12, 2025



AGENDA

Introduction

Regional Housing Needs Assessment Review

Local Findings

Next Steps



Regional Housing Needs Assessment

60-Day Review by Local Governments

July 14 to September 12, 2025

What is DRCOG?

The Denver Regional Council of Governments is a planning organization where local governments collaborate to establish guidelines, set policy and allocate funding in the areas of **transportation** and **personal mobility, growth and development**, and **aging and disability resources**.





Housing in Metro Vision

- Diverse **housing options** meet the needs of residents of all ages, incomes and abilities.
 - Diversify the region's **housing stock**.
 - Increase the regional supply of **housing attainable** for a **variety of households**.
 - Increase opportunities for **diverse housing accessible by multimodal transportation**.

Regional Housing Needs Assessment

- Initiated by the DRCOG Board of Directors in 2023 in response to the region's pressing housing challenges.
- Provides a **shared, data-driven foundation** to understand how much housing the region needs, where, and at what price points.
- Provides the **scale and scope of housing needs** so we can develop strategies that match the reality on the ground.

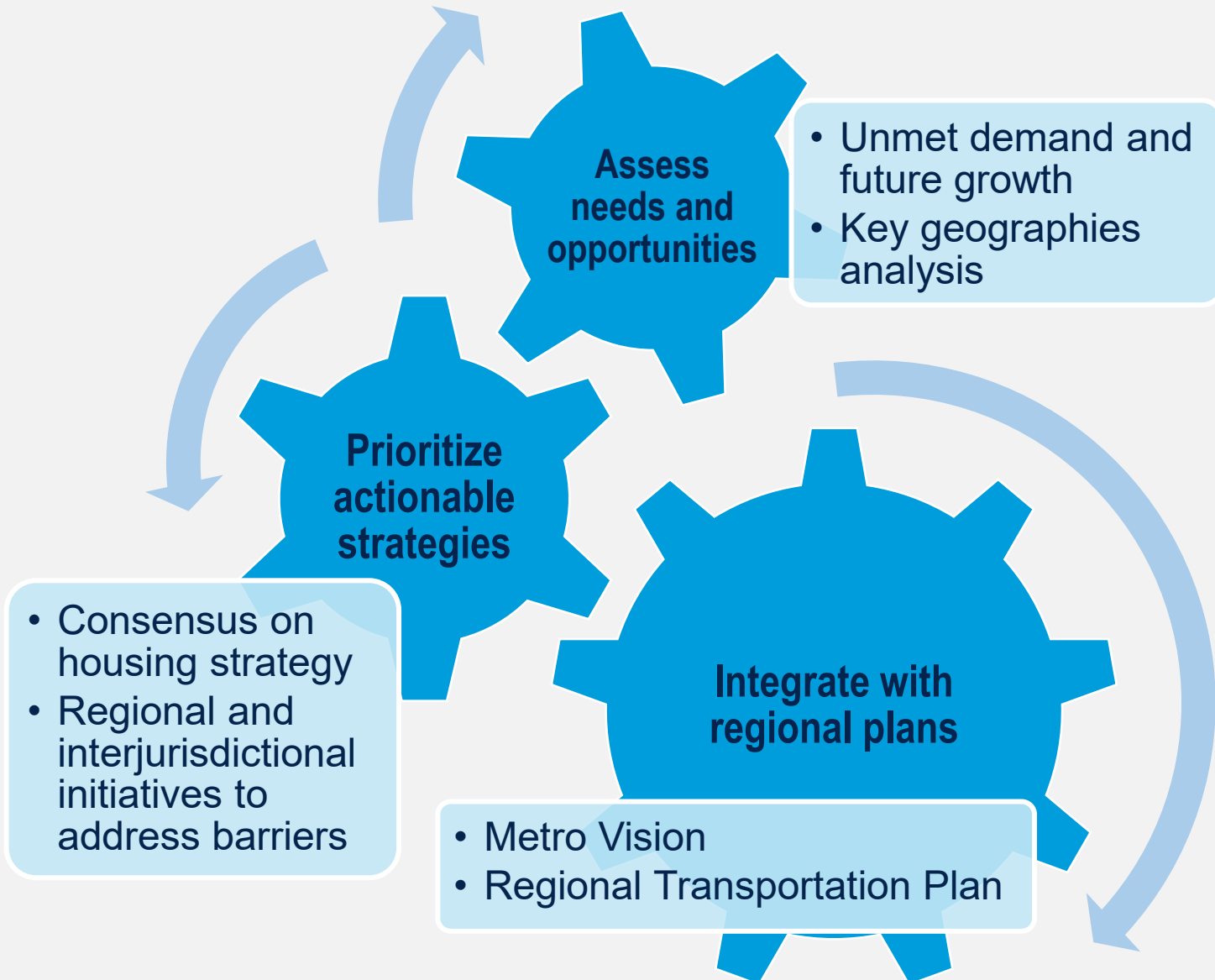


Need for regional coordination

- **Housing markets are regional.**
- People make choices about where to live based on factors that cross jurisdictional boundaries.
 - Jobs.
 - Affordability.
 - Schools.
 - Amenities.
 - Childcare.
 - More.



DRCOG's path to a regional housing strategy



Regional Housing Needs Assessment

October 2023–July 2024

- Data analysis.
- Understand barriers.
- Framework for strategy.

Regional Housing Strategy

December 2024–January 2026

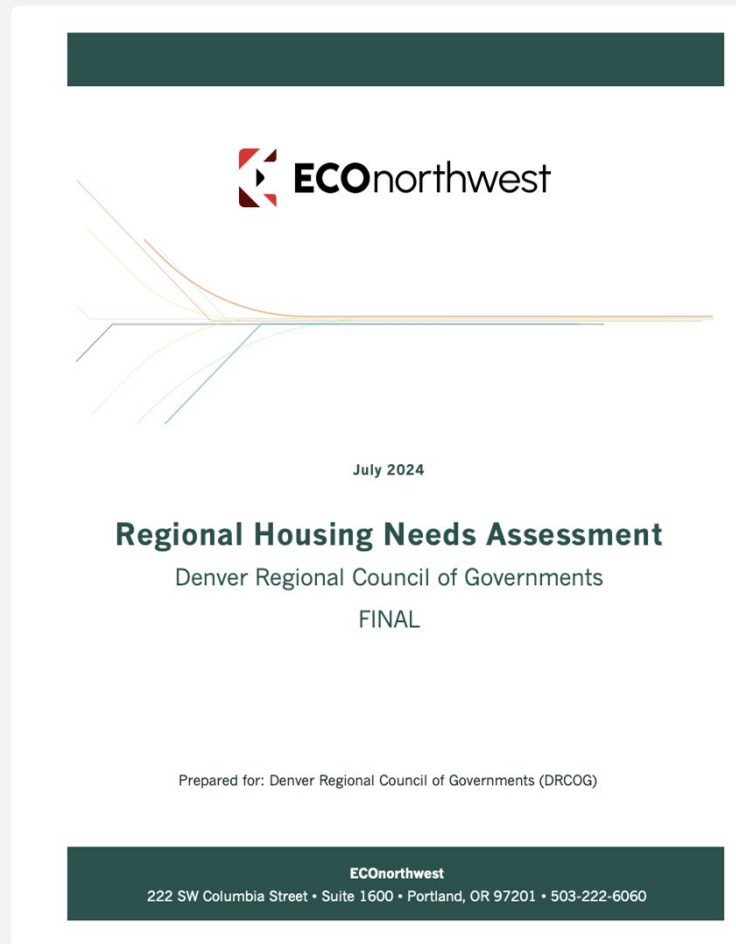
- Regional implementation structure.

Regional plan updates

2025–2026

- Guide Metro Vision and regional transportation plan updates.

Regional Housing Needs Assessment report



1. Data analysis:

- Identified gaps in housing supply and affordability across income levels and household types.

2. Barriers analysis:

- Collaborated to identify barriers to housing development.

3. Strategy framework:

- Outlined direction to move toward a regional strategy.

Stakeholder engagement





Sustainable Affordable Housing Act

(Colorado SB24 – 174)



Sustainable Affordable Housing Assistance law

- Senate Bill 24-174 passed by State of Colorado in May 2024.
- Requires local governments to conduct a housing needs assessment that conforms to DOLA methodologies by December 31, 2026.
- Local governments are exempt from the requirement to conduct a local housing needs assessment if they **"participate" in a regional housing needs assessment that complies with DOLA methodologies.**

Regional Housing Needs Assessment: Sustainable Affordable Housing Assistance Act compliance status

- **December 2024:** DRCOG staff **submitted** the Regional Housing Needs Assessment to DOLA for review as an existing assessment.
- **February 2025:** **Conditional Approval** of the assessment received from DOLA with needed technical changes required to reach Substantial Conformity.
- **April 2025:** DRCOG staff **completed all necessary changes** to the assessment to reach **substantial conformity**.



COLORADO
Department of Local Affairs



How to "participate"

- Local governments in the DRCOG region may use the regional assessment for compliance with the housing needs assessment requirement of SB24-174 if the **local government's governing body reviews the Regional Housing Needs Assessment at a public meeting and submits comments to DRCOG during a defined 60-day review period**, between July 14, 2025 to September 12, 2025.

Comment submission

- Submit comments to DRCOG between **July 14, 2025 to September 12, 2025** by emailing the materials to metrovision@drcog.org.
 - Include the date, time and location of the public meeting and review.
 - Even if your jurisdiction has no comments, please send documentation that notes "no comments".

Key Deadlines

- **July 14 to September 12, 2025**- 60-day review period.
- **September 12, 2025**- Last day to submit written comments to DRCOG.
- **December 31, 2026**- Local governments are required to conduct and publish a state-compliant housing needs assessment if they did not participate in the 60-day review period for the regional assessment.





Key Findings of the Regional Housing Needs Assessment

Summary of key findings

- Despite periodic building booms, the **region has not produced enough housing to keep pace** with population and job growth.
- **Low-income households** (below 50% Area Median Income) represent the greatest need for additional housing.
- **Aging population and smaller household** trends will require more diverse housing types.
- Housing types and affordability are **unevenly distributed across the region**.

Total regional need

To address current and future needs across the income spectrum, the Denver region needs to build 500,000 units by 2050. To stay on track to reach that goal, the region should work toward building 223,000 new units through 2032.



Includes all units to address current shortages

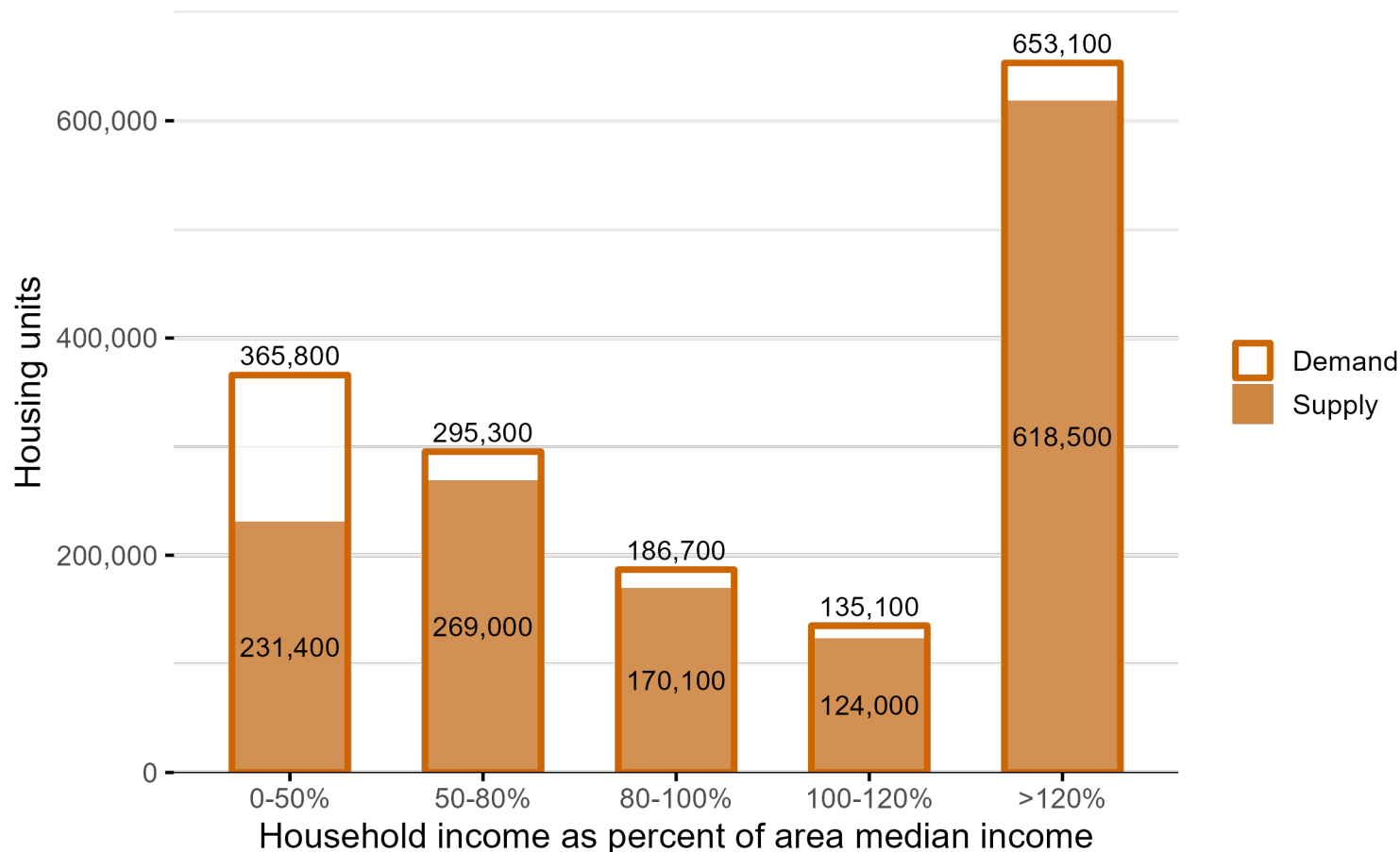
10-year regional housing needs

Component	Housing units
Current need	69,000
Future need	154,000
Total units	223,000

- The Denver region will need to produce about **223,000 new housing units between 2023-2032** to meet current and future regional housing needs.

Source: ECONorthwest analysis; DRCOG small-area forecast, 2025; Metro Denver Homeless Initiative State of Homelessness Report, 2022–2023

Distribution of need – 2032



Source: ECONorthwest analysis; DRCOG small-area forecast, 2025; Metro Denver Homeless Initiative State of Homelessness Report, 2022–2023

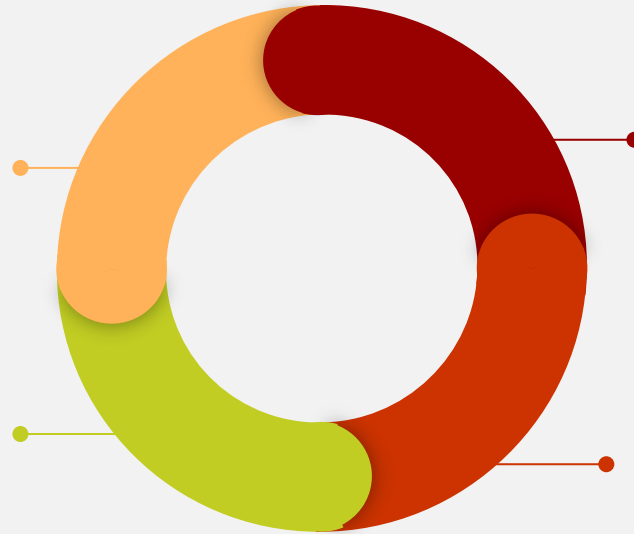
- **Almost 135,000 units for households earning 0–50% Area Median Income are needed to meet current and future demand by 2032.**

Identifying local housing needs

- Model for identifying the need in local communities.

Population
e.g., current population,
future population

Employment
e.g., current jobs,
future jobs



Transportation
e.g., current transit,
future transit,
commute times

Housing
e.g., affordable
units, vacancy rates



Understanding the numbers

- The assessment provides the **scale and scope of housing needs** so we can develop strategies that match the reality on the ground.
- The precise number is not as important as understanding the scale and scope of housing need and **developing a strategy that is proportionate to the need.**



Dashboard

Select municipalities:

5 options selected



Use the selector above to select your desired jurisdictions. Click the button below to download the filtered dataset.

 **DOWNLOAD DATA**

 **DOWNLOAD POWERPOINT**

Overview

About the Regional Housing Needs Assessment

Housing in the Denver region isn't just about shelter—it's about opportunity, equity, and community. As housing affordability challenges affect quality of life in our region, our housing landscape must evolve to meet the needs of our residents.

In response to our region's pressing housing challenges, the DRCOG Board initiated the development of a Regional Housing Needs Assessment in 2023. The purpose was to understand the scale and scope of housing need as a foundation for future discussions about strategies to address the need. The assessment began with an analysis of regional housing data to identify gaps in housing supply and affordability across income levels and household types. This dashboard shares the results of the analysis at a subregional and local level. For more on the regional analysis, [please visit the Regional Housing Needs Assessment webpage on the DRCOG website](#).

About this dashboard and the RHNA results

We are committed to transparency and accessibility, ensuring stakeholders can readily engage with the outcomes of this effort. An objective, data-driven understanding of total housing need and affordability gaps will critically inform local, regional and statewide efforts to address housing challenges.

The housing needs assessment results shown here represent the 10-year regional housing need (2023-2032), distributed to regional submarkets and then distributed to local jurisdictions. It is important to note that the assessment relies on a regional model, where need is distributed 'down' to jurisdictions, and not a local model where need is 'rolled up' to the regional level. Because housing markets transcend jurisdictional boundaries, an analysis of regional housing need is crucial to inform our understanding of local needs. These calculations help various sectors involved in housing policy and production preliminarily understand the scope and scale

Select municipalities:

5 options selected



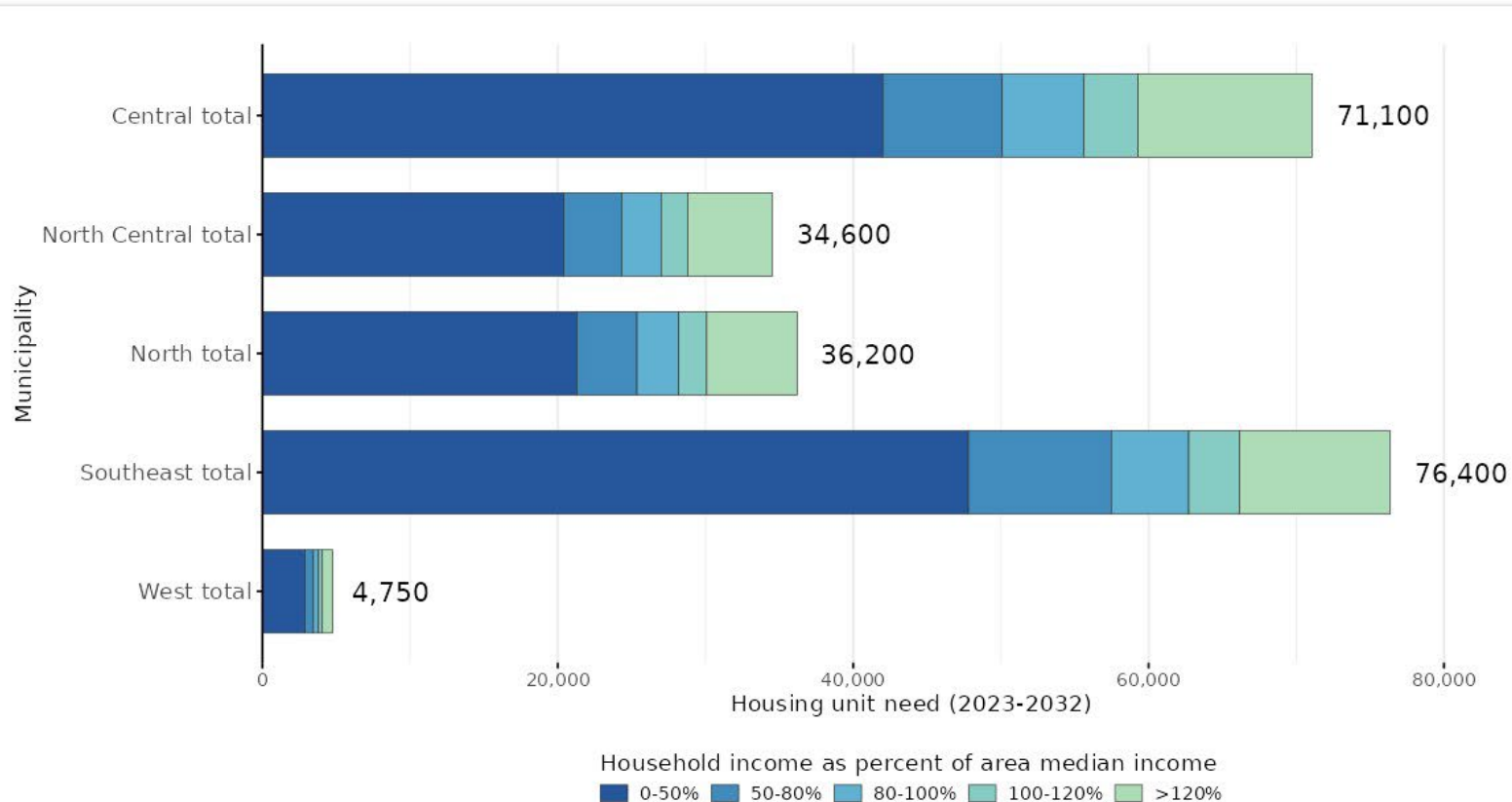
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10-year local need by income

[What does local need mean?](#)



Source: DRCOG, ACS PUMS 1-Year 2022, ECONW calculations

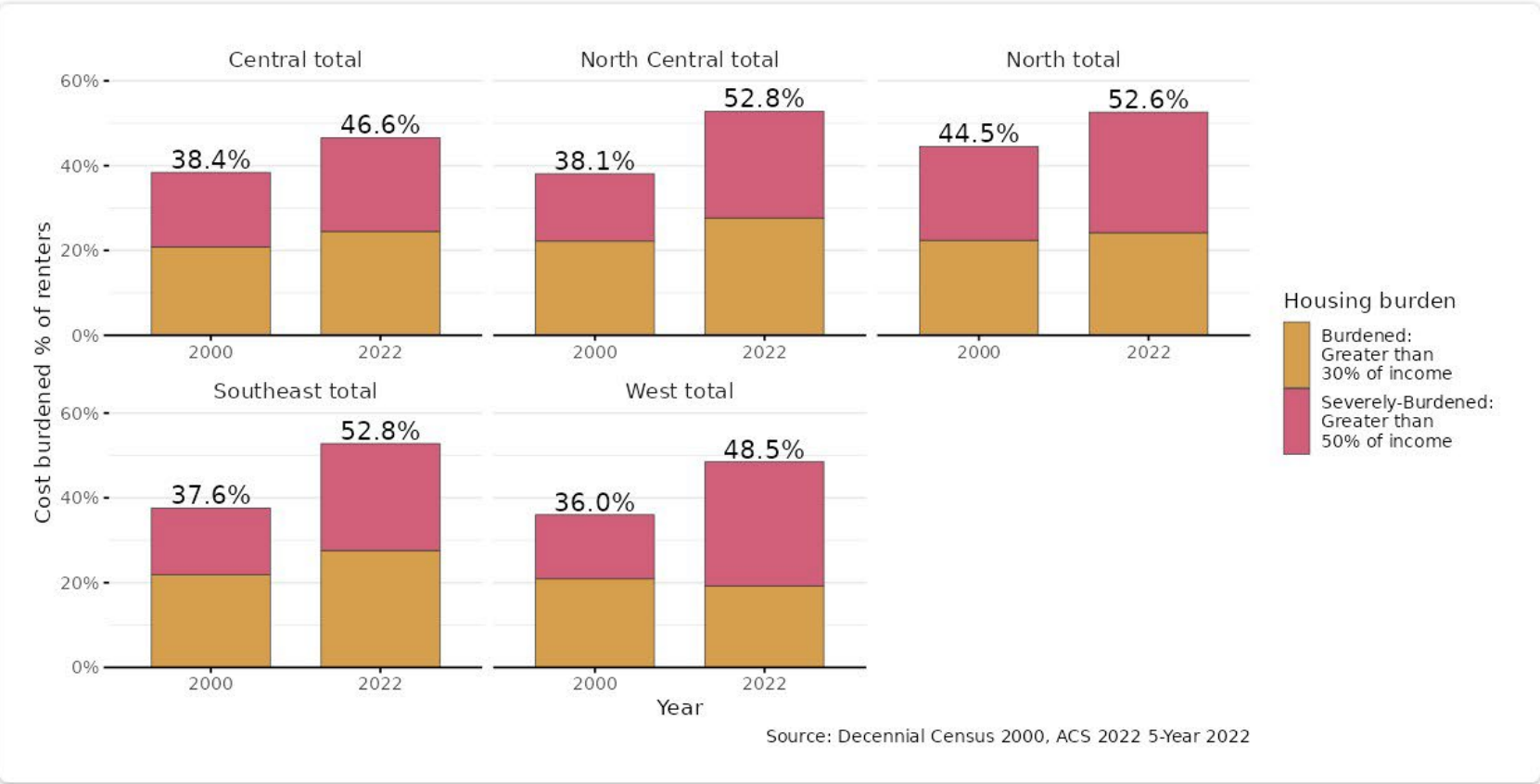
Select municipalities:

5 options selected

Use the selector above to select your desired jurisdictions. Click the button below to download the filtered dataset.

- DOWNLOAD DATA
- DOWNLOAD POWERPOINT

- Housing burden
- Permitting trends
- Current supply
- Dwelling type
- Tenure
- Household size
- Household growth
- Job growth
- Jobs by earnings
- Disability
- Data sources



Select municipalities:

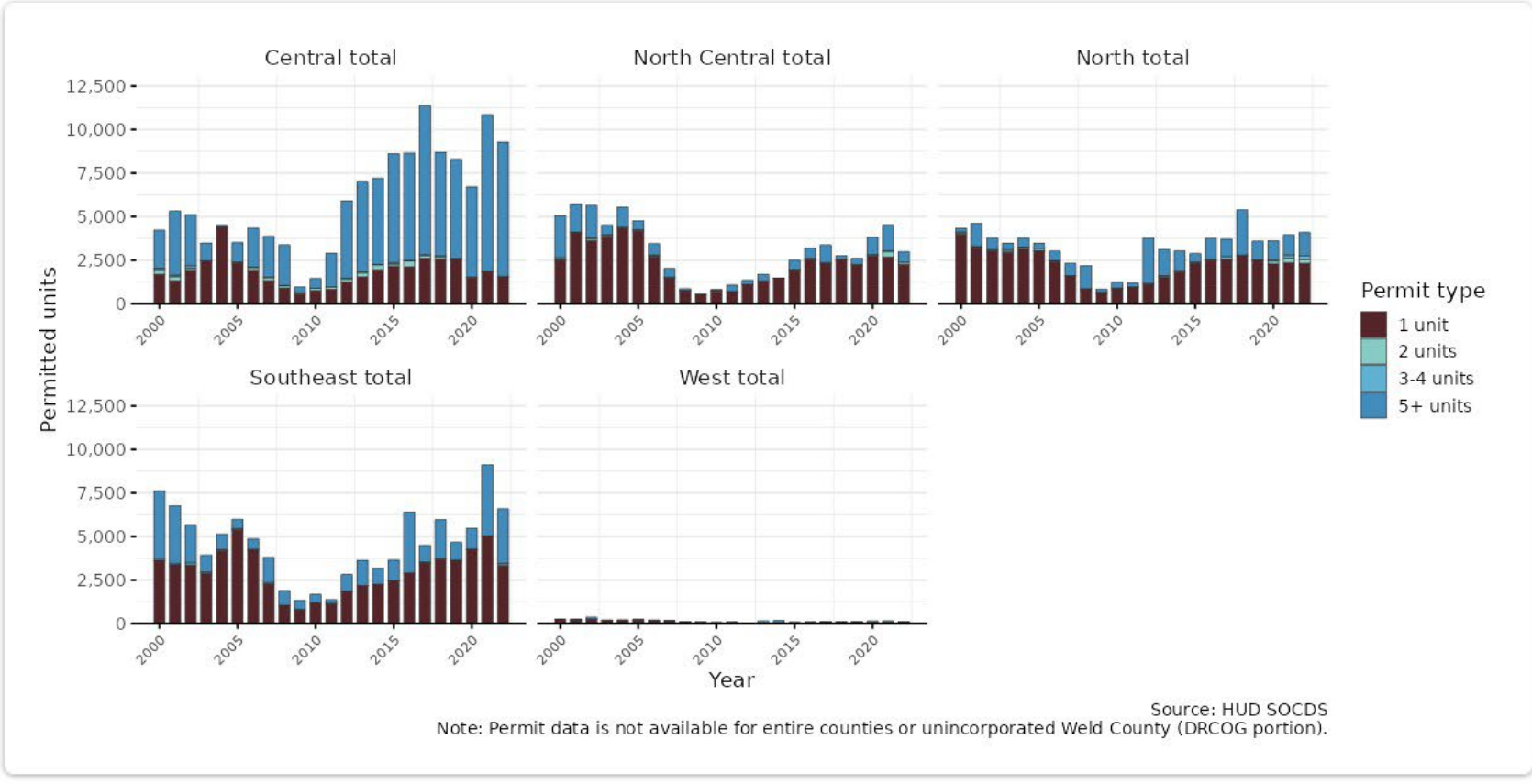
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Select municipalities:

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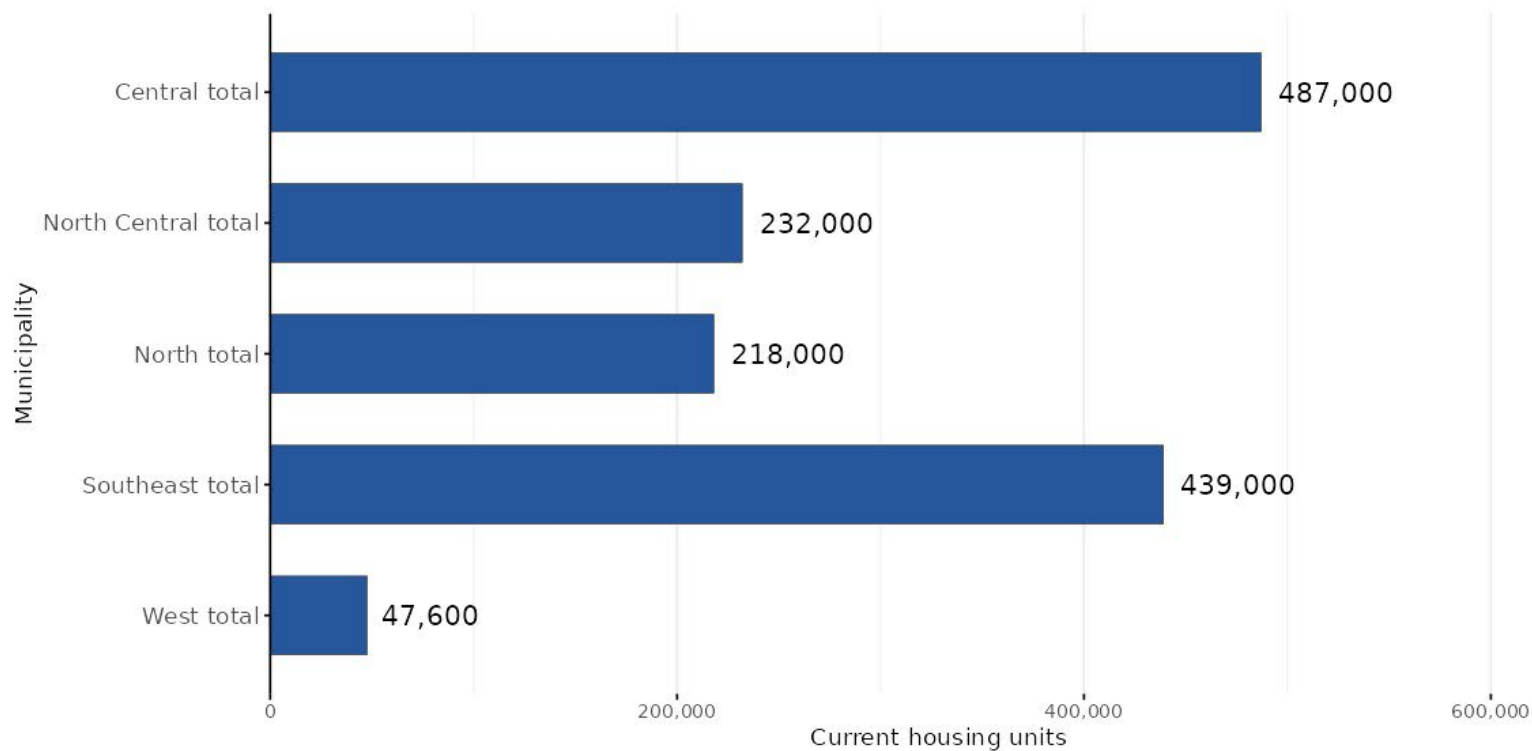
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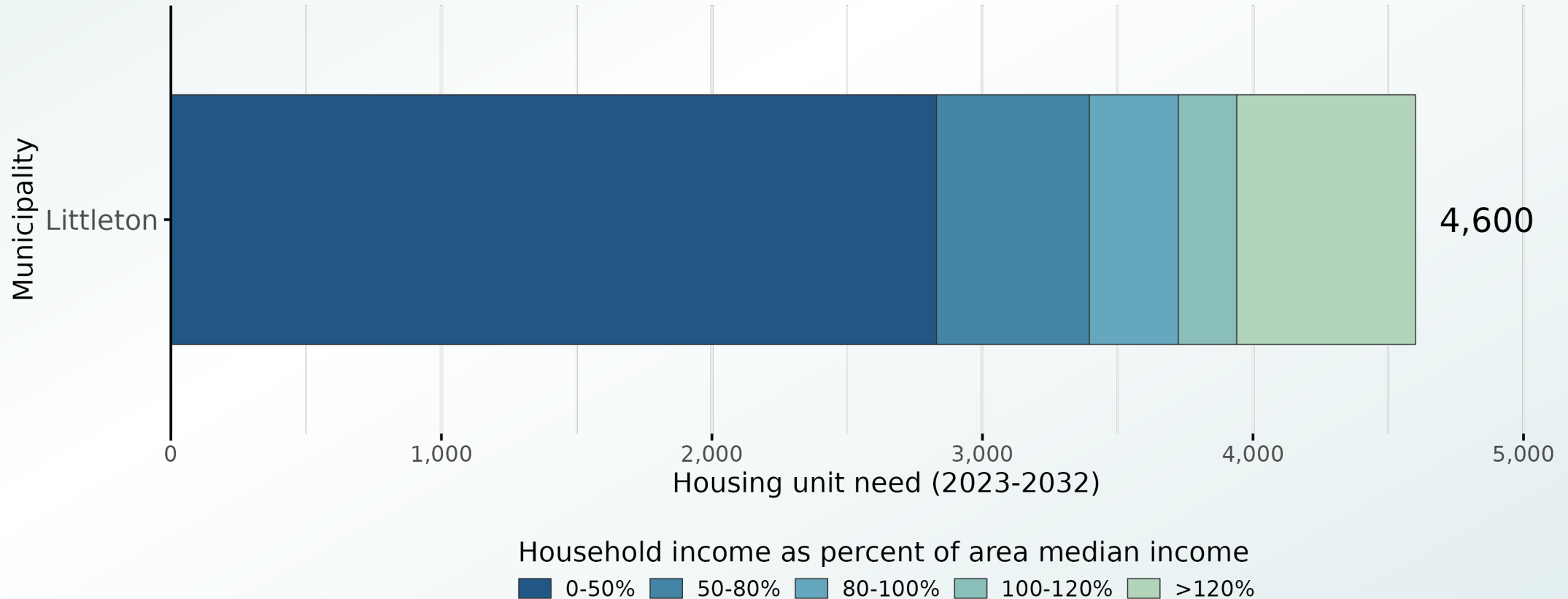
[Housing burden](#)
[Permitting trends](#)
[Current supply](#)
[Dwelling type](#)
[Tenure](#)
[Household size](#)
[Household growth](#)

[Job growth](#)
[Jobs by earnings](#)
[Disability](#)
[Data sources](#)



Source: ACS PUMS 1-Year 2022, Decennial Census 2020

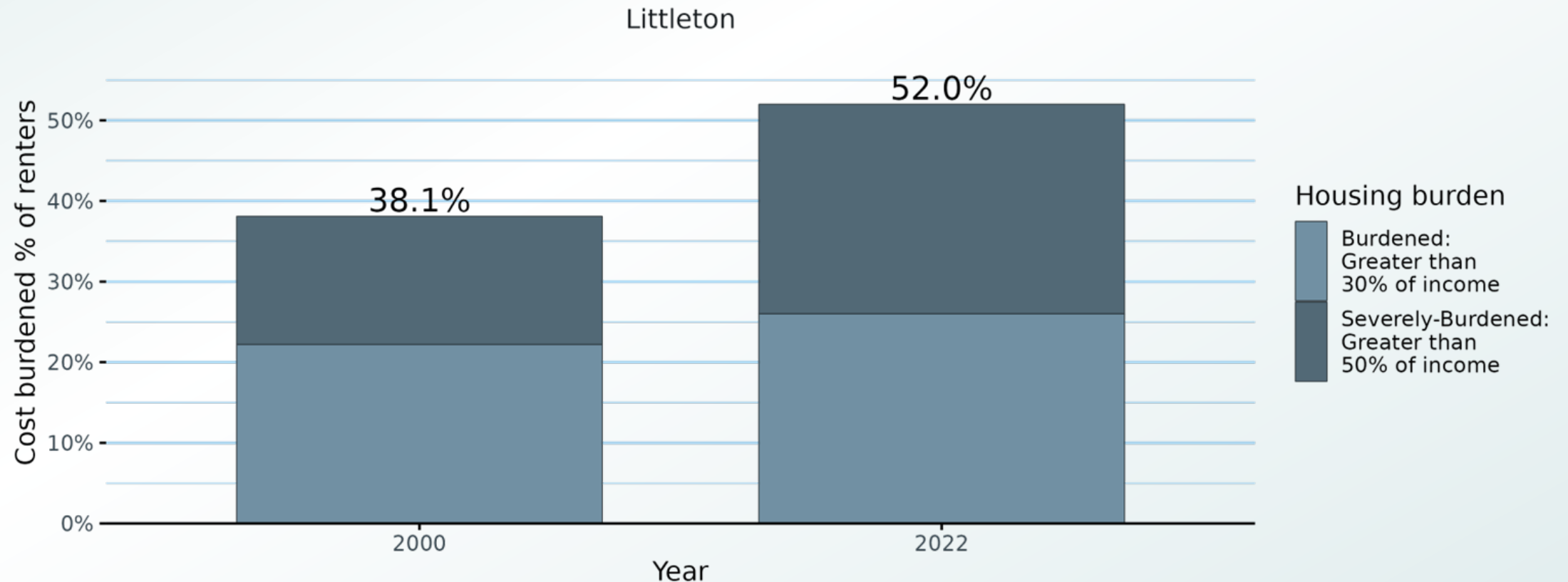
LITTLETON'S 10-YEAR HOUSING NEED



Source: DRCOG, ACS PUMS 1-Year 2022, ECONW calculations

- **Greatest need at 0-50% AMI levels**
- **Approximately 6% of Southeast regional need**

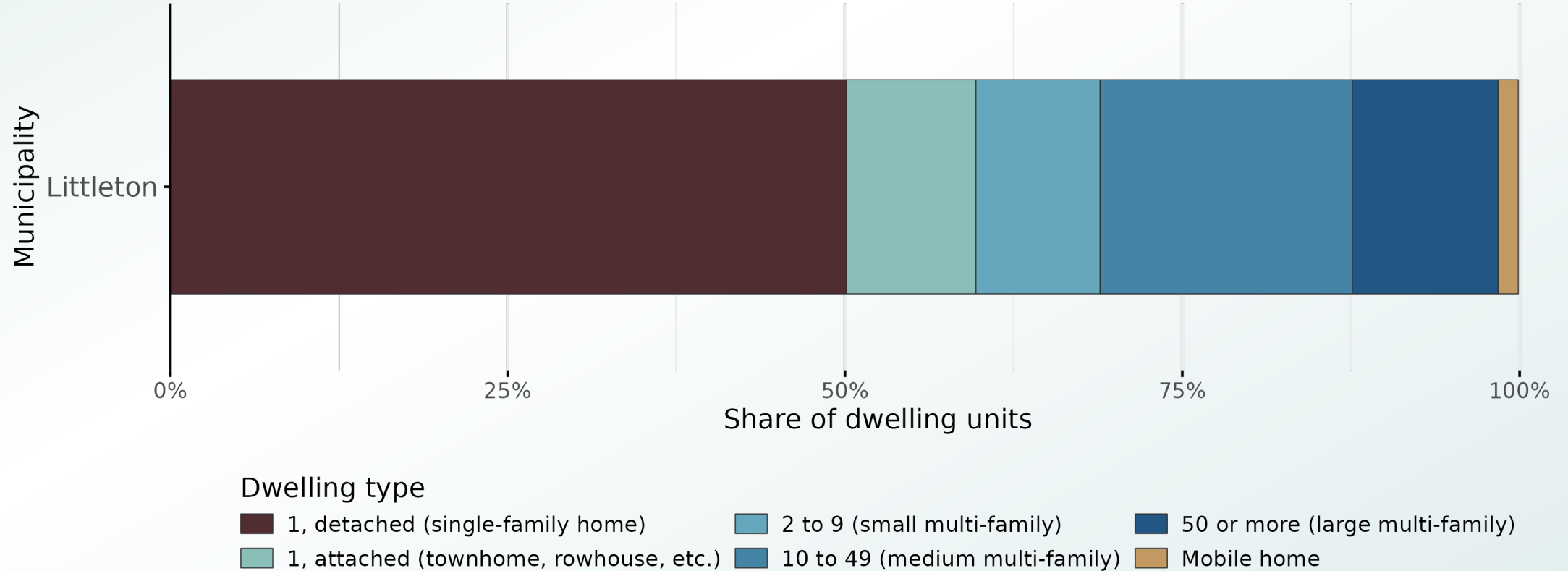
COST BURDENED HOUSEHOLDS IN LITTLETON



Source: Decennial Census 2000, ACS 2022 5-Year 2022

- Majority of residents are cost burdened
- 26% of residents are severely cost burdened, up from 16% in 2000

EXISTING DWELLING TYPE

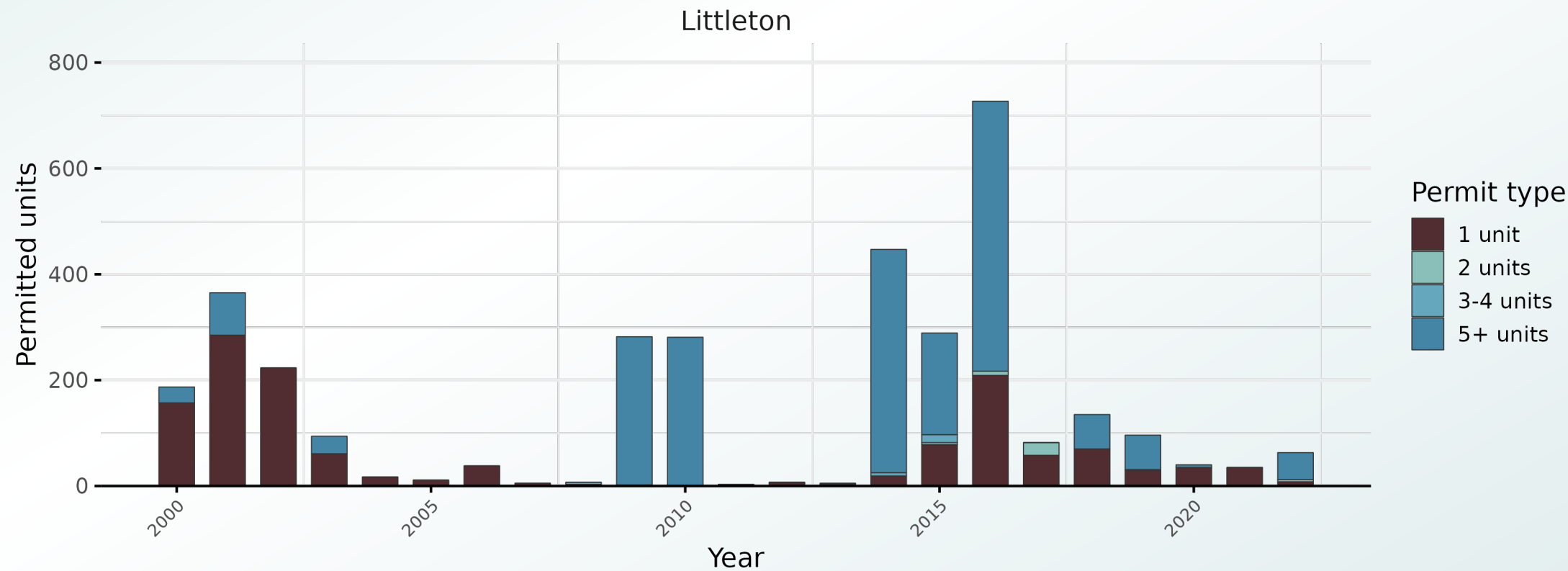


Source: ACS 2022 5-Year 2022

Note: Values may not add up to 100% due to the exclusion of units with dwelling type 'Boat, RV, van, etc.'

- Approximately 21,500 units overall

PERMITTING TRENDS



Source: HUD SOCDS
Note: Permit data is not available for entire counties or unincorporated Weld County (DRCOG portion).

NEXT STEPS

- Comment Submittal to DRCOG before September 12 in compliance with SB24-174
- DRCOG Regional Housing Strategy next phase January 2026

Thank you and more information

- Regional Housing Needs Assessment:
 - drcog.org/growth-development/regional-housing-needs-assessment
- Sheila Lynch, Division Director of Regional Planning and Development at DRCOG
 - SLynch@drcog.org
- Senate Bill 24-174
 - leg.colorado.gov/bills/sb24-174
- Colorado Division of Local Affairs
 - dlg.colorado.gov/housing-plans

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