

Housing Assessment Guide

UGA Housing and Demographics Research Center



College of Family and Consumer Sciences

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Housing and Demographics Research Center

UNIVERSITY OF GEORGIA



**Georgia Initiative for
Community Housing**

Acknowledgements

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What is a housing assessment?

A housing assessment is a survey of residential structures and their immediate surroundings. While homes are the primary focus, information on vacant lots and commercial property can be assessed as well. Trained volunteers use either paper or digital surveys to collect home exterior data from the street or sidewalk. Observation and recording of the home exterior provides a snap-shot of current housing conditions in order to identify substandard housing. Housing conditions surveys can be a vital initial step in a holistic housing revitalization plan seeking to address needs in housing tenure, affordability, and more.

ALTERNATIVE NAMES INCLUDE:

- Windshield Survey (observations from a vehicle)
- Walking Survey (observations on foot)
- Neighborhood Housing Assessment
- Housing Conditions Survey

In this document housing assessment and housing survey are used interchangeably.

Who conducts them?

Trained volunteers typically conduct surveys using a guided checklist or survey. They score each component of the home exterior and surrounding lot. Depending on the target area, surveys can be conducted by a single person or teams of people over a period of several weeks or months. Community volunteers, city staff, and students make great volunteers.

Why are they important?

Why should you consider conducting one?

Do you know what your current housing stock looks like? How much of the housing stock is in substandard condition? Do you have an affordable rental housing need, affordable homeownership need, senior housing need, or other housing challenges like blight or high foreclosure or eviction rates?

Housing assessments provide additional information that might not be reflected on paper from tax assessments or realtor listings. By having primary data that is current and unbiased, city and county departments can better locate and assess areas in need of rehabilitation and revitalization. Before undergoing an affordable housing initiative, it is vital to understand the local housing stock.

How is the information used?

Local & county governments and housing teams are able to use this information as a starting point to analyze where substandard and dilapidated housing is located in their community. You can target areas of need for current and future projects.

“A housing assessment provides an unbiased guide as to where we need to focus our rehabilitation and revitalization efforts to improve living conditions for citizens of our city.”

Tiffany Walraven

Three Phases of a Housing Assessment:



DEVELOPMENT



IMPLEMENTATION



ANALYSIS

Development of a well organized survey on the front end will generate more accurate data during implementation and lead to better analysis at the end.



Development

How do you conduct a housing assessment?

The process of conducting a quality housing assessment begins and ends with being well prepared and organized. It means bringing the right people to the table to help with each phase of the process. Do you already have a good working relationship with community partners? If not, this is a great opportunity to expand and develop relationships. These include a wide range of stakeholders, including financial institutions, realtors, law enforcement, local non-profits, local/ county government, churches, and university extension agents. Many of these groups are likely already a part of your housing team, but if you see a need that arises after team formation, do not hesitate to reach out and invite new representatives to join.

It is important to note that your city planner(s) should be involved in the planning stages. If you do not have a planning department or staff, consider consulting with your county GIS Department, an outside GIS agency or regional planning commission, academic center, or a private geospatial engineer. These groups may already be represented on your housing team, but if not, consider reaching out to establish a better relationship with them. Regional commissions in particular may help to develop, promote and assist in establishing coordinated and comprehensive planning in the state. They enjoy investing and working on projects with Georgia Initiative for Community Housing teams and local governments. For example, the City of Pembroke consults with an outside GIS agency and overlaps data to work on water, sewer, streets, crime data along with housing data. This way they can correlate their housing survey data to other potential factors and criteria when preparing grants, code enforcement, and planning. Keep in mind that this consulting service from any organization may cost anywhere from a few hundred dollars to a few thousand depending on the scope and depth of your project.

Developing a strong plan helps keep your team organized and on track. Create a checklist of steps, responsibilities, and timelines and do your best to adhere to them.

Identify your goals

All housing assessments should begin by asking these questions:

Why are we doing this?

What are we trying to identify?

What is our goal?

How does it fit with our comprehensive plan?

What do we want to get out of this survey?

Write down a list of answers to these questions and use them to initially guide you. In planning their housing assessment, the City of Pembroke began seeking insight by asking these additional questions:

*What are the things that you **know**?*

*What are the things that you **know that you don't know**?*

*What are the things that you **think you know but you don't**?*

*What are the things that you **don't know that you don't know**?*

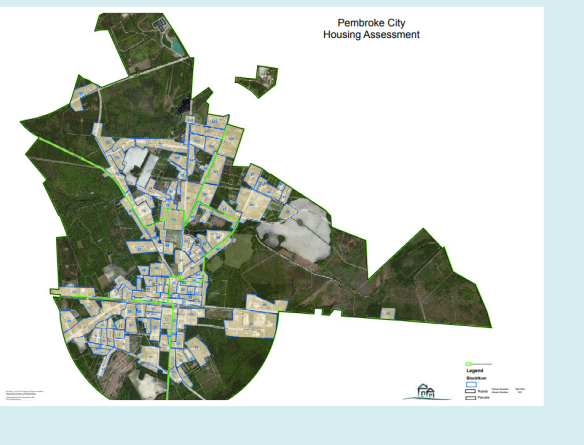
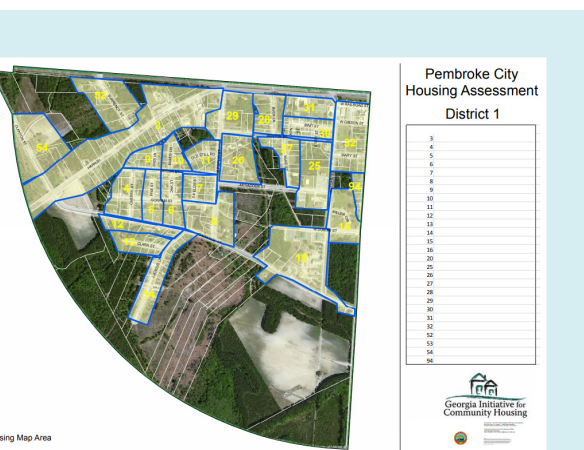
Identify a target area and create a plan

Target Area
the homes and area
you plan to cover
in your housing
assessment.

Your target area identifies the homes and area you plan to cover in your housing assessment. It should be small enough so that it is feasible, but large enough of an area to not target or alienate certain residents. Many focus on neighborhoods with the greatest number of housing problems, but a narrow focus can result in overlooking areas that have unexpected housing issues and can create a sense of suspicion among community members.

Once you identify the target area, it is helpful to develop a preliminary map and spreadsheet that includes the parcel ID, address, homestead status, owner info, and structure characteristics. This can be accomplished using tax assessor data provided through public data tools (QPublic). A broader geographic focus may take more time, but it will provide a broader perspective and identify additional properties in need of rehabilitation. This information can be found with you county tax assessors. You can also add custom questions to collect different types of data that benefits your community specifically.

Create maps of the areas you want to survey and group parcels into blocks based on a variety of geographical markers. Many communities use council districts as boundaries, but divisions based on neighborhoods, streets, or walking distances can also be created using GIS. This way you can organize and assign volunteers to those blocks. Top left is an example of one of the city council districts broken down into numbered sub-districts for their housing assessment. Bottom left is the overview of all four districts. From here, volunteers were assigned based on blue subsections.



Next, you need to decide the format for collecting data through the survey. While paper surveys can be an alternative for volunteers not as comfortable with technology, we strongly encourage digital surveys instead. By conducting a digital survey you save time, especially in mapping the information once you have collected the data. It also reduces error and includes an option of photos with each entry. Tablets and iPads work well for carrying house to house and can be preloaded with the data collection software. For more information about about digital survey tools, please contact the UGA Housing and Demographic Research Center.

The time frame in which surveys are conducted can be over one weekend or spread over several weeks. It depends on the number of volunteers you recruit and the time frame you have them out on foot.

Marketing

It is very important to publicize your housing assessment in advance. Residents and the community need to be aware that you will be walking up and down their street and taking pictures of their home. This can be done using a variety of methods. Past teams have held public meetings, mailed postcards, set up a booth at community events, added a notice on utility bills, developed press releases for newspaper stories, distributed door hangers, social media posts, yard signs and conducted outreach at community institutions. We recommend a combination of several of these methods to ensure that the greatest number of residents are aware of the housing assessment ahead of time. Involve the community and communicate how the results will benefit the residents of the neighborhoods

To help raise awareness while the housing assessment is underway, many communities have printed neon t-shirts to identify volunteers with the project and placed yard signs at the beginning of the street. If purchasing t-shirts is not feasible, neon safety vests provide a lower-cost, effective alternative. To the right are door hanger and postcard examples used by two GICH alumni cities.



The City of Pembroke and Downtown Development Authority of Pembroke are partnering forces to develop a long-term housing initiative within the City. Quality, affordable housing is essential to the citizens of Pembroke and for future economic growth within our city. The goal of our initiative is to address the housing and revitalization needs of a community through partnerships and coordinated action.

The Georgia Initiative for Community Housing (GICH) offers communities throughout the State of Georgia a three year program of collaboration and technical assistance. Each year, five communities are chosen through an application process to participate in the program. The City of Pembroke and Downtown Development Authority of Pembroke are proud to announce that our city was chosen as 1 of 5 in Georgia in 2013 along with Roswell, Dalton, Lithonia, and Greensboro.

To kickstart our program, the Pembroke Housing Team will be conducting field surveys to gather data on the current housing inventory in our city. Volunteers from the community will be out on the street from August-October in green shirts or safety vests gathering data. This data will help the city apply for weatherization/revitalization grants as well as with future planning for growth and development. The volunteers will not be entering the homes but evaluating the exterior condition for planning purposes. If you should have any questions or concerns, please contact the following:

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Pembroke Better Hometown Director
912-653-4413
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Tiffany Walraven
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912-656-8151
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Monroe Housing Team
Local leaders guiding initiatives for neighborhood revitalization and housing growth

As part of a local initiative to strategically think about housing, the City of Monroe is conducting a housing assessment. We will collect data on every home within the city limits. This data will enhance future planning for our community's housing needs.

www.facebook.com/MonroeHousingTeam
housing@monroega.gov | (770) 266-5331

Volunteers

Conducting a housing assessment requires a lot of work. You will not be able to conduct a thorough survey without the help of many volunteers at each step of the process. Community volunteers, city staff, and students make great volunteers. Is there a college or university in your county? Consider recruiting volunteers from there or even the local high school. Churches and local civic groups are also potential sources for volunteers.

Be strategic about recruiting volunteers from all parts of your community, especially those you will be surveying.

The number of volunteers needed can vary depending on the number of houses and the density within your target area and the strategy used to collect data. The City of Pembroke complete over 50% of their surveys in a single 8 hour day and utilized around 50 volunteers. Other communities have completed their housing assessments over several weeks or months, using a smaller number of volunteers and multiple data collection days.

Volunteers are the people observing parcels and collecting the data. In order to collect good data, you and your volunteers need to be trained on how to assess the condition of a residential home. For example: What does major dry rot look like when you are looking at a home from the street? Is the roof in need of partial repair or complete re-roofing?

Using our digital resources, plan a meeting gathering your volunteers for training. This should be done one or two sessions in advance of your anticipated survey dates and highlight the following:

- Explain what the Georgia Initiative for Community Housing program is and who is included on your local housing team.



Volunteers

are the people observing parcels and collecting the data. In order to collect good data, you and your volunteers need to be trained on how to assess the condition of a residential home.

- Demographics of your city: population, housing tenure (how many residents own their own or rent), vacancy rate, etc.
- Educate them on the housing issues in your community.
- Explain the purpose of your housing assessment.
- Why they (the volunteers) are there participating in a community wide effort.
- Go over your project timeline.
- Explain the survey. Walk through what is included and what the terms mean.
- Go over practice scenarios of assessing a home, then go over the correct issues and severity to help them learn how to correctly identify problems.
- Encourage them to wear comfortable clothes and shoes for walking around neighborhoods conducting surveys.

When planning your survey logistics, assign volunteers in teams of two. One person to assess the home and the other to input the observations on the tablet, iPad, or paper survey. We suggest alternating periodically so each person has the opportunity to perform both roles.

In order to complete a survey, volunteers will spend several minutes standing in front of people’s homes and taking pictures. To residents who are unaware, this can seem intrusive and a breach of privacy. Especially in neighborhoods with excessive blight, it can invoke worry and suspicion. Take time to converse with residents who come outside. Answer their questions and listen to their concerns. Keep in mind that some residents may be alarmed and have questions as to why you are in their neighborhood taking pictures. Explain that a survey is being conducted in all or multiple neighborhoods, not just their neighborhood. This will help dispel any misconceptions that the local government might be ‘coming in to take down’ their home. Provide information about the GICH program and explain that the goal is to improve the housing in the community. The data is often used to bring grant funding to the community.

TIP: While the volunteers you recruit will have donated their time and energy for free, it is still important to thank them in a small way. A great way to do this is by feeding them lunch before heading out to conduct surveys. Don’t forget to provide water.



Implementation

Insert a question here??

Implementation of the survey

Organization is key here. On the days you conduct your survey, gather your volunteers in a central location before starting the data collection. Communicate and brief them on the plan for the day and send them out in groups. Provide a contact number for a point person in case any problems arise or questions come up while groups are in the neighborhoods.

Timing - Plan for 1-3 minutes at each parcel. Don't forget to budget for time spent walking and conversation with residents. Budget how much time each each parcel block will take depending on how many volunteers you have available.

Safety - Volunteers should travel in pairs to avoid being alone, and wear their team shirt or safety vest at all times. Be mindful of traffic in areas without sidewalks. Mornings are often the best time to conduct the surveys as there is less traffic and it is cooler. Respect private property and do not trespass. Stay on public sidewalks and streets.

Volunteers may have misperceptions of and feel uncomfortable walking in low-income neighborhoods because of the stigma often attached to these communities. Talking with residents who are outside and having residents from the target neighborhoods assist with the data collection may help volunteers to see the neighborhood issues in a different way.

Respect private property and do NOT trespass.

Give yourself realistic expectations - Bad weather, schedule changes, manpower, and many other things can prevent "perfect execution" of your housing assessment. Keep in mind that you may not be able to complete 100% of the target area you initially planned to and this is okay. Do your best to collect as many surveys as possible, but do not think that missing a few constitutes failure.

Prepare your materials - Make sure that tablets and iPads are fully charged. Plan out the route for the day. Print out maps of the route and parcels to be covered.

Data collection

For specific step by step instructions for use of the data collection application, tablets, and software, visit the Training Materials and Resources tab. There we have instructions for tablet set up, use, and data retrieval under the section: Survey set-up with Open Data Kit (ODK).

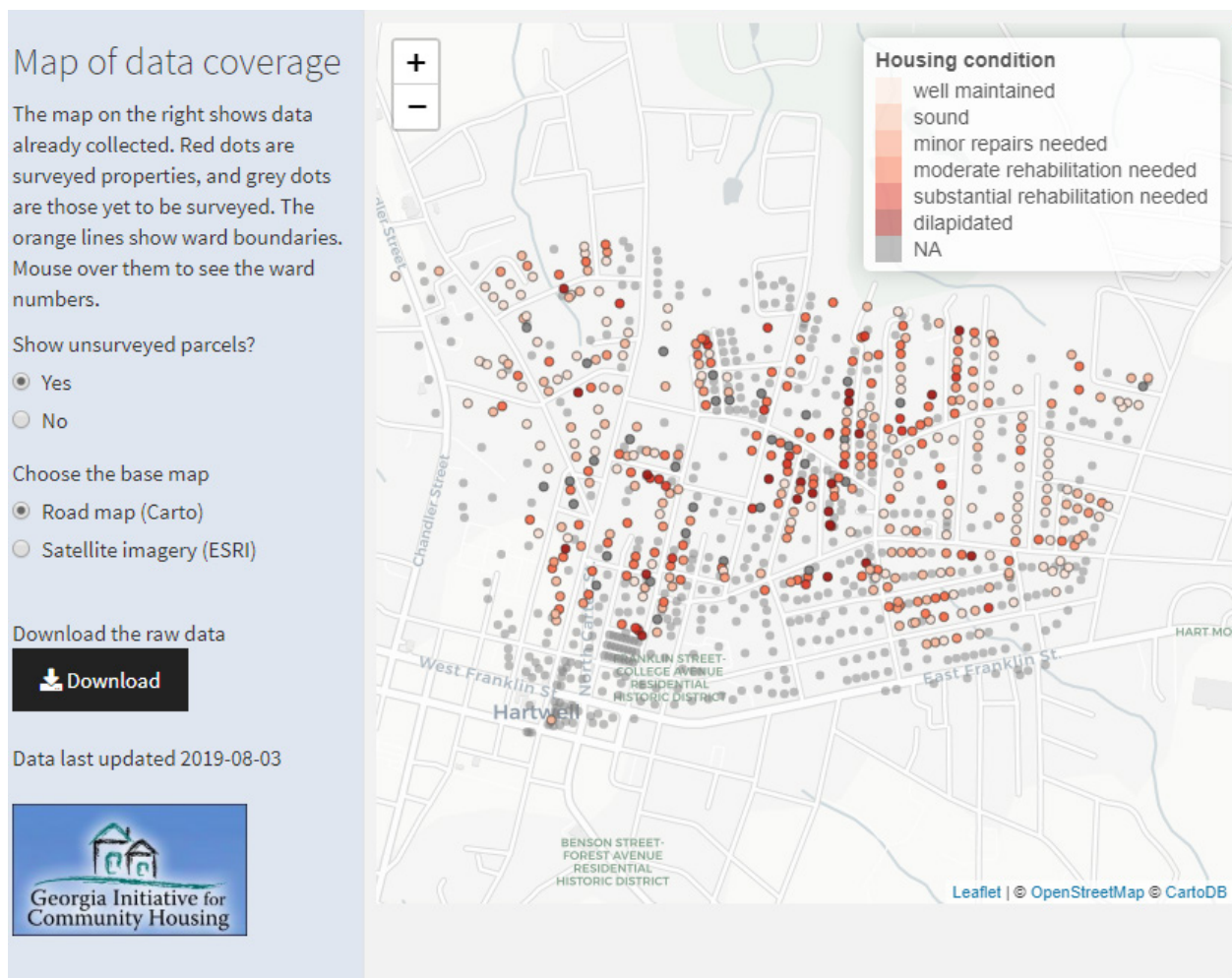


Analysis

What do you do with the results?

Analysis of Data: You have completed surveys in your target area. Now what?

Depending on which organization you enlist to map your community, you should receive access to a software that visually compiles the information you gathered from your survey. This way, for example, you are able to see that in your community there is one street where the most dilapidated homes are located and can focus your revitalization efforts there.



The University of Georgia Community Mapping Lab, in partnership with the UGA Housing and Demographic Research Center, provides services for digital data collection. We utilize Open Data Kit and Fulcrum software tools for mobile data collection. We also use the web application Shiny to visualize and analyze housing assessment data.

The following video details how to use the web application to analyze your data based on the survey map and common issues.

<https://www.youtube.com/watch?v=XjWfjgkJtSo&>

Feel free to explore the Motor City Mapping Project in Detroit. The city of Detroit, Michigan archived their massive mapping project with easy to use toggle features. Some of the features and tools you see there can be available for your community based on your housing assessment.

<https://motorcitymapping.org/#t=overview&s=detroit&f=all>

Uses for housing assessment results: How have other communities used their data?

The ways in which local communities can utilize housing assessments can be placed into four general categories.

Understanding Housing Issues

Perhaps the most fundamental use of housing assessments is identifying the nature of the housing issues in a given community. A thorough housing assessment can reveal issues that are well known in the community and those that may have been overlooked.

- Determine the housing gaps (i.e. whether a deficit or surplus of housing units exists for households at various income levels by tenure)
- Identifies the nature of housing affordability in an area
- Identify problem landlords
- Identify heir property issues

Future Planning and Policy Decisions

Housing assessments also assist local government officials, non-profit organizations, and the general public with the development of policy strategies and programs that address the housing issues identified in the assessment. Some policy decisions and programs that housing assessments can help inform include:

- Neighborhood revitalization
- Crime prevention
- Code enforcement

Grants and Funding

In most states, to be eligible for state and federal funds, local governments are required to develop comprehensive plans that outline the housing needs in their jurisdictions. Housing assessments can be a valuable source for this information. Several housing funding programs in Georgia that require local housing assessments include:

- Community Development Block Grants (CDBG)
- Community Housing Improvement Program (CHIP)
- Low Income Housing Tax Credits (LIHTC)

Economic Development

Housing plays a central role in the economic vitality of a city. Housing development provides residential space for an area's workforce which improves the operations of local industry and serves as a consistent tax base for local government. Therefore, housing assessments are often used in understanding the overall economic health of a community. There are several economic development activities that are rooted in the availability and condition of a community's housing.

- Employer recruitment and retention
- Facilitation of investment in the community
- Enhancing the wealth and economic vibrancy of residents