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# Appendix B: Housing Needs Assessment

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December 2023



**King County**

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94

3374 community.<sup>947</sup> Community members report that the quality, safety, and diversity of the  
3375 neighborhood are important to finding housing.<sup>948</sup> Community engagement indicated that  
3376 LGBTQ+ seniors will sometimes hide their LGBTQ+ identity in order to feel safe in housing.<sup>949</sup>  
3377 LGBTQ+ community members in South King County identified the need for expanded access to  
3378 services in rural areas of South King County.<sup>950</sup> LGBTQ+ residents in South King County  
3379 reported that the most common reason they moved to South King County was due to  
3380 affordability.<sup>951</sup> Often, these residents moved out of Seattle and further south due to increasing  
3381 housing costs.

3382  
3383 LGBTQ+ residents of South King County reported experiencing housing discrimination based  
3384 on their sexual orientation and gender identity.<sup>952</sup> A representative from Queer Power Alliance,  
3385 formerly LGBTQ Allyship, shared with King County staff that the use of a chosen name that  
3386 does not match identification records has been leveraged by landlords and property owners to  
3387 deny an application.<sup>953</sup> Stronger enforcement of fair housing laws and expanded access to  
3388 tenant protections would increase access to safe, stable housing for LGBTQ+ residents.<sup>954</sup>  
3389 Community members share that they need to feel like they can trust their landlords or other  
3390 housing service providers.<sup>955</sup> LGBTQ+ community members note that finding information about  
3391 housing from a trusted source, such as a community-based organization or queer housing  
3392 group, is important.<sup>956</sup> Residents believe it is important that housing organizations have  
3393 inclusivity in statements, use inclusive terminology and images, have experience working with  
3394 trans people, and have LGBTQ+ staff.<sup>957</sup>

3395

## 3396 VII. Land Capacity Analysis

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<sup>947</sup> LGBTQ Allyship. (2019). *2018-2019 South King County Housing Listening Sessions Report of the LGBTQ+ Community*.

<sup>948</sup> LGBTQ Allyship. (2021, September). *Affirmative Housing Marketing Strategies for LGBTQ+ Communities in South King County*.

<sup>949</sup> T. Farley, personal communication with DCHS staff, June 21, 2023.

<sup>950</sup> LGBTQ Allyship. (2019). *2018-2019 South King County Housing Listening Sessions Report of the LGBTQ+ Community*.

<sup>951</sup> LGBTQ Allyship. (2019). *2018-2019 South King County Housing Listening Sessions Report of the LGBTQ+ Community*.

<sup>952</sup> LGBTQ Allyship. (2019). *2018-2019 South King County Housing Listening Sessions Report of the LGBTQ+ Community*.

<sup>953</sup> T. Farley, personal communication with DCHS staff, June 21, 2023.

<sup>954</sup> LGBTQ Allyship. (2019). *2018-2019 South King County Housing Listening Sessions Report of the LGBTQ+ Community*.

<sup>955</sup> LGBTQ Allyship. (2021, September). *Affirmative Housing Marketing Strategies for LGBTQ+ Communities in South King County*.

<sup>956</sup> LGBTQ Allyship. (2021, September). *Affirmative Housing Marketing Strategies for LGBTQ+ Communities in South King County*.

<sup>957</sup> LGBTQ Allyship. (2021, September). *Affirmative Housing Marketing Strategies for LGBTQ+ Communities in South King County*.

3398 **Section Summary**

3399 This section conducts the land capacity analysis as required by CPP H-12 and the Growth  
3400 Management Act (GMA) as amended by House Bill 1220.<sup>958</sup> This section also fulfills CPP H-4d  
3401 and H-4i.<sup>959</sup>

3402  
3403 CPP H-12 requires jurisdictions to:

3404 *Identify sufficient capacity of land for housing including, but not limited to income-restricted*  
3405 *housing; housing for moderate-, low-, very low-, and extremely low-income households;*  
3406 *manufactured housing; multifamily housing; group homes; foster care facilities; emergency*  
3407 *housing; emergency shelters; permanent supportive housing; and within an urban growth area*  
3408 *boundary, duplexes, triplexes, and townhomes.*

3409  
3410 CPP H-4d and H-4i requires jurisdictions to:

3411 *Conduct an inventory and analysis in each jurisdiction of existing and projected housing needs*  
3412 *of all segments of the population and summarize the findings in the housing element. The*  
3413 *inventory and analysis shall include:*

- 3414 d) *Percentage of residential land zoned for and geographic distribution of moderate- and*  
3415 *high-density housing in the jurisdiction; and*  
3416 i) *Housing development capacity within a half-mile walkshed of high-capacity or frequent*  
3417 *transit service, if applicable.*

3418  
3419 This land capacity analysis follows guidance from the Washington State Department of  
3420 Commerce.<sup>960</sup> The guidance assumes certain zone categories match to different housing types  
3421 and affordability levels. Although these assumptions may appear simplified, King County's  
3422 comprehensive plan must identify a quantifiable and sufficient capacity of land to accommodate  
3423 all projected housing needs, per the Growth Management Act. Table 6 shows the analysis and  
3424 assumptions for unincorporated King County. These assumptions reflect the current economic  
3425 conditions of King County's housing market.

3426  
3427 This land capacity analysis finds sufficient zoning capacity to accommodate permanent housing  
3428 needs at all income levels and special housing types.<sup>961</sup> However, this analysis finds there is  
3429 insufficient capacity in commercial zones to meet unincorporated King County's emergency  
3430 housing need of 1,034 beds by 2044.<sup>962</sup> This lack of capacity could be resolved through  
3431 amending King County Code to clarify which emergency housing types are allowed in which  
3432 zones. King County staff are conducting analysis to update the code. See emergency housing  
3433 analysis in "X. Making Adequate Provisions to meet the Housing Needs of All Economic

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<sup>958</sup> State of Washington Legislature. (2021). House Bill 1220: Emergency Shelters and Housing—Local Planning and Development. [\[link\]](#)

<sup>959</sup> King County Clerk of the Council (2023, June). *An ordinance adopting and ratifying amendments to the 2021 King County Countywide Planning Policies*, Appendix A: King County GMPC Motion 21-1, a motion recommending amendments to the King County Countywide Planning Policies to the King County Council. [\[link\]](#)

<sup>960</sup> Growth Management Services. (2022, December). Guidance for Evaluating Land Capacity to Meet All Housing Needs. Washington State Department of Commerce. [\[link\]](#)

<sup>961</sup> Original King County Staff Analysis. (2023).

<sup>962</sup> Original King County Staff Analysis. (2023).

3434 Segments of the Community,” which identifies barriers for emergency housing in unincorporated  
3435 King County.  
3436

3437 Approximately 94 percent of the land in the urban unincorporated area that allows residential  
3438 housing is zoned for eight dwelling units per acre or fewer.<sup>963</sup> Except for accessory dwelling  
3439 units, moderate or high-density housing is unlikely to be constructed in these areas.  
3440

3441 Urban unincorporated King County has a total development capacity of 4,173 housing units  
3442 within a half mile walkshed of high-capacity or frequent transit.<sup>964</sup> North Highline and Skyway-  
3443 West Hill contain 86 percent of the parcels identified.<sup>965</sup>  
3444

### 3445 **Permanent Housing**

3446 King County must plan to accommodate 5,412 permanent housing units in unincorporated King  
3447 County by 2044.<sup>966</sup> King County staff followed the Washington State Department of Commerce  
3448 guidance to conduct a land capacity analysis to determine if there is sufficient capacity to meet  
3449 future housing needs in unincorporated King County under current zoning and development  
3450 regulations.<sup>967</sup> This analysis first identifies the net developable acres and planned density in  
3451 each land use zone to determine total capacity in zone categories. Land use zones, for this  
3452 analysis, are grouped into the following four zone categories:

- 3453 • Low density: single detached homes;
- 3454 • Middle density: townhomes, duplex, triplex, quadplex;
- 3455 • Low rise: apartments or condominiums up to three floors; and
- 3456 • Mid rise: apartments or condominiums up to six floors.

3457 Table 6 compares the aggregated housing needs of each income level to the total capacity in  
3458 each zone category. This analysis finds there is sufficient capacity to meet projected permanent  
3459 housing needs at all income levels in unincorporated King County under current zoning and  
3460 development regulations.<sup>968</sup> This analysis identifies a land capacity surplus of 27,965 permanent  
3461 housing units.<sup>969</sup>  
3462

---

<sup>963</sup> Original King County Staff Analysis. (2023). Department of Local Services Assessments. Natural Resources and Parks.

<sup>964</sup> Original King County Staff Analysis. (2023).

<sup>965</sup> Original King County Staff Analysis. (2023).

<sup>966</sup> King County Clerk of the Council (2023, June). *An ordinance adopting and ratifying amendments to the 2021 King County Countywide Planning Policies*, Appendix A: King County GMPC Motion 21-1, a motion recommending amendments to the King County Countywide Planning Policies to the King County Council. [\[link\]](#)

<sup>967</sup> Growth Management Services. (2022, December). Guidance for Evaluating Land Capacity to Meet All Housing Needs. Washington State Department of Commerce. [\[link\]](#)

<sup>968</sup> Original King County Staff Analysis. (2023).

<sup>969</sup> Original King County Staff Analysis. (2023).

3463  
3464

Table 6: Comparison of Projected Housing Needs to Capacity<sup>970</sup>

Income Level (%AMI) and Special Housing Needs	Projected Housing Need	Zone Categories Serving These Needs	Aggregated Housing Needs	Total Capacity in Zone Category	Capacity Surplus or Deficit
0-30% PSH	608	Low rise, mid rise, and ADUs	2,628	15,114	<b>12,486</b>
0-30% Other	1,157				
>30-50%	571				
>50-80%	292				
>80-100%	366	Middle density	781	8,595	<b>7,814</b>
>100-120%	415				
>120%	2,003	Low density	2,003	9,668	<b>7,665</b>
<b>Total</b>	<b>5,412</b>		<b>5,412</b>	<b>33,377</b>	<b>27,965</b>

3465  
3466

## Emergency Housing

3467  
3468

### Emergency Housing Land Capacity in Commercial Zones

3469  
3470

King County must plan to accommodate 1,034 emergency housing units in unincorporated King County by 2044.<sup>971</sup> Emergency housing is non-permanent housing types such as shelters and tiny homes. Using the guidance provided by Commerce, King County staff found there is insufficient capacity to meet projected emergency housing needs in commercial zones under current zoning and development regulations.<sup>972</sup> This analysis found a land capacity deficit in commercial zones of 116 emergency housing and shelter beds/units in unincorporated King County.<sup>973</sup> The 2024 Comprehensive Plan adopted code changes that clarify which emergency housing types are allowed in which zones and streamline permitting, thereby increase the zoning capacity and reducing barriers to developing emergency housing (See the emergency housing analysis in “X Making Adequate Provisions for Housing Needs of All Economic Segments of the Community”).

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Table 7 compares the total land capacity to the total projected emergency housing need in commercial zones in unincorporated King County. The analysis calculates the capacity by totaling the acres in the 117 parcels identified as potential sites for emergency housing or shelter in Commercial Business (CB), Regional Business (RB), and Office (O) zones. Potential

3483  
3484

3485

<sup>970</sup> Original King County Staff Analysis. (2023).

<sup>971</sup> King County Clerk of the Council (2023, June). *An ordinance adopting and ratifying amendments to the 2021 King County Countywide Planning Policies*, Appendix A: King County GMPC Motion 21-1, a motion recommending amendments to the King County Countywide Planning Policies to the King County Council. [\[link\]](#)

<sup>972</sup> Growth Management Services. (2022, December). *Guidance for Evaluating Land Capacity to Meet All Housing Needs*. Washington State Department of Commerce. [\[link\]](#)

<sup>973</sup> Original King County Staff Analysis. (2023).

3486 parcels are those which are larger than half an acre and within 1/4 mile of a transit stop. The  
3487 analysis identifies the average density based on the densities of existing emergency housing  
3488 projects.  
3489

3490 *Table 7: Surplus or Deficit for Emergency Housing and Emergency Shelter in Commercial Zones<sup>974</sup>*

Site Grouping	Assumed Density	Average Density	Total Acres	Total Capacity	Total Need	Capacity Surplus or Deficit
Emergency Shelter: Congregate Shelter	40	53	17.22	918	1,034	(116)
Emergency Housing: Tiny House Villages	60					
Emergency Housing: Existing Housing Conversion	60					

3491  
3492 **Emergency Housing Land Capacity in Residential Zones**  
3493 Some emergency housing types could be permitted outside commercial zones in  
3494 unincorporated King County. King County staff therefore conducted an additional analysis and  
3495 found there is sufficient land capacity in urban residential zones to meet projected emergency  
3496 housing needs in unincorporated King County.<sup>975</sup> This analysis identified a land capacity surplus  
3497 in residential zones of 4,728 emergency housing and shelter beds/units in unincorporated King  
3498 County.<sup>976</sup>

3499 Table 8 compares the total land capacity to the total projected emergency housing need in  
3500 unincorporated King County. This analysis calculates the zoning capacity by totaling the acres  
3501 in the 2,235 parcels identified as potential sites for emergency housing or shelter in residential  
3502 zones. Potential parcels are those which are larger than half an acre and within 1/4 mile of a  
3503 transit stop.  
3504

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<sup>974</sup> Original King County Staff Analysis. (2023).

<sup>975</sup> Residential zones include R-4, R-6, R-8, R-12, R-18, and R-24; this analysis excludes R-48.

<sup>976</sup> Original King County Staff Analysis. (2023).



3505 Table 8: Surplus or Deficit for Emergency Housing and Emergency Shelter in Residential Zones<sup>977</sup>

Site Grouping	Assumed Density	Average Density	Total Acres	Total Capacity	Total Need	Capacity Surplus or Deficit
Emergency Shelter: Congregate Shelter	40	53	108	5,760	1,034	4,726
Emergency Housing: Tiny House Villages	60					
Emergency Housing: Existing Housing Conversion	60					

Total acres include potential parcels in land use zones: R-4, R-6, R-8, R-12, R-18, and R-24.

3506  
3507 **Percentage of Residential Land Zoned for and Geographic Distribution of**  
3508 **Medium- and High-Density Housing**  
3509

3510 This section analyzes the zoning and land use for unincorporated King County to understand  
3511 how much land is zoned for different levels of residential density. See Table 9 for King County’s  
3512 land use zones organized by category. Staff classified R-8, which allows up to eight dwelling  
3513 units per acre under base density, as low-density housing, as developers are unlikely to  
3514 construct “middle housing” types, such as townhomes, rowhouses, or duplexes, triplexes or  
3515 quadplexes, in this zone. Developers could build middle housing types at eight dwelling units  
3516 per acre, but it would require a significant percentage of the property remain open space.  
3517  
3518  
3519

Table 9: King County Zones Categorized by Residential Density Allowed

Zone	Category
R-24, R-48, CB, RB, O	High Density
R-12, R-18	Moderate Density
R-1, R-4, R-6, R-8, NB	Low Density
A-10, A-35, RA-2.5, RA-5, RA-10, UR	Rural Density
F, M, I	Excluded

3520

<sup>977</sup> Original King County Staff Analysis. (2023).

3710 **Emergency Housing Production Gap Analysis**

3711  
3712 Table 13 shows the gap analysis for emergency housing production in unincorporated King  
3713 County. The emergency housing production analysis makes the same assumptions as the  
3714 housing production gap analysis above as well as the assumption that the emergency housing  
3715 that opened since 2016 will remain open through 2045.

3716  
3717 The 2024 King County Comprehensive Plan adopted code changes to define emergency  
3718 housing and to make emergency housing an allowed use in some zones. This removes a  
3719 significant barrier to meeting the need for emergency housing in unincorporated King County.

3720  
3721 *Table 13: Emergency Housing Production Gap Analysis*

Net New Emergency Housing Units Needed (2020-2045)	Emergency Housing Production (2016-2024)	Assumed Emergency Housing Production (2025-2045)	Surplus/ Deficit
1,005	144	320	-589

3722  
3723  
3724 **Affordable Housing Funding Gap Analysis**

3725 King County staff conducted a cost modeling analysis to calculate the additional funds required  
3726 to meet the projected gap in production for households with incomes at or below 80 percent  
3727 area median income in unincorporated King County. The analysis makes the following  
3728 assumptions:

- 3729 • all net new permanent housing need at or below 80 percent area median income must  
3730 be achieved through public financing of income-restricted housing;
- 3731 • the per unit cost of building new affordable units averages about the same for 0 to 30  
3732 percent, 30 to 50 percent, and 50 to 80 percent and is therefore not differentiated;
- 3733 • all existing revenue sources for affordable housing are renewed and the average total  
3734 number of units created at 0 to 80 percent area median income continue to be produced  
3735 at the same rate;
- 3736 • the average cost per unit to build affordable housing is \$475,404 based on all projects  
3737 funded by the King County Housing Finance program in 2022 and;
- 3738 • inflation will increase annually at a rate of 7.4%, based on the average annual  
3739 percentage increase in the Seattle Mortenson Construction Cost Index from 2016  
3740 through 2022.<sup>991</sup> Mortenson is a national construction engineering firm that calculates  
3741 the index quarterly by pricing a representative non-residential construction project in  
3742 Seattle and other geographies throughout the country.

3743 Based on the overall deficit of 357 housing units, this analysis identifies a need for  
3744 approximately \$450,936,000 more than current funding levels to meet the housing needs of  
3745 unincorporated King County households with incomes at or below 80 percent area median  
3746 income over the 2025 through 2044 planning period. On an annual basis, the funding gap is

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<sup>991</sup> M.A. Mortenson Company. (2023). *Seattle Construction Cost Index, Q4 2022*. [\[link\]](#)

4831 duplexes, triplexes, and fourplexes and offer regulatory flexibilities to encourage their  
4832 development.<sup>1188</sup>

4833  
4834 *Multifamily Tax Exemption*

4835 Chapter 84.14 Revised Code of Washington established the multifamily tax exemption  
4836 program.<sup>1189</sup> The program authorizes local governments to exempt the value of new housing  
4837 construction, conversion, and rehabilitation from property taxes for eight to twenty years,  
4838 depending on the location of the project and the income levels served.

4839  
4840 In 2021, Senate Bill 5287 changed the population threshold that makes counties eligible to  
4841 implement the program, making King County eligible.<sup>1190</sup> The 2024 Comprehensive Plan  
4842 adopted a Work Plan Action item for King County Multifamily to conduct a study evaluating the  
4843 benefit and impacts of a Multifamily Tax Exemption program, and if recommended, to propose  
4844 an ordinance to adopt r a Multifamily Tax Exemption program for unincorporated King County.  
4845 Further community engagement to Multifamily inform this recommendation will be necessary  
4846 before recommending whether to allow a Multifamily Tax Exemption program.

4847  
4848 *Emergency Housing*

4849 House Bill 1220 required that cities conduct a Land Capacity Analysis. King County conducted a  
4850 Land Capacity Analysis and found that there was sufficient land capacity for all housing types,  
4851 except for emergency and permanent supportive housing. The 2024 Comprehensive Plan  
4852 adopted code changes aimed at clarifying the allowed zones these housing types are allowed in  
4853 to ensure sufficient zoned capacity and to reduce barriers to their development.  
4854

---

<sup>1188</sup> King County (2023) Public Review Draft Ordinance 19026 [\[link\]](#)

<sup>1189</sup> Chapter 84.14 Revised Code of Washington. [\[link\]](#)

<sup>1190</sup> Washington State Legislature. (2021). *Senate Bill 5287*.[\[link\]](#)