



Legislation Text

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Fiscal Note

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Title

Report on Evaluation Study Framework: Inclusionary Zoning Ordinance.

Body

Amended Resolution 61774, authorized Department of Planning and Development staff to develop a framework to evaluate the Inclusionary Zoning Ordinance.

Further, the Policy and Protocols of the Inclusionary Zoning Ordinance identified that the Department would report back to Council on the status of the program operations.

Attached is a copy of the Inclusionary Zoning Ordinance Evaluation Study Framework that has been prepared in response to both initiatives. The report is in three parts: Introduction, Multi-year Study Design, and Annual Evaluation of the Ordinance. Part I details the policy framework for the evaluation studies.

Part II provides the framework and organization for the multi-year study design of the Inclusionary Zoning Ordinance.

- **Production:** The focus will be on inclusionary units that are being produced, their location, and other data that will provide the context under which the analysis will occur.
- **Post-Production:** This portion of the Evaluation Study will examine the medium- and longer-term aspects of the Ordinance in three areas; units produced through the Ordinance, the households occupying the units, and the market within which the units are a part.
- **Marketing:** Marketing the availability of units, and how people respond to the marketing may change over time, from being a new concept to a point when the concept will be a part of the Madison housing landscape. Long-term success of the program may be tied to how the units are marketed to eligible households.

Part III of the document identifies the information we will gather so that we can report back to policy makers how the program is operating, and use the information to either refine the program operation, and also be compiled in a way that feeds directly into the long-term evaluation identified in Part II.

When the Ordinance was passed, there was some hope by staff that additional resources would be available to help facilitate the studies, particularly the longer-term study component. At that time there was interest from the University of Wisconsin (both the Planning and Business Schools) to evaluate the longer-term effects, if any, on the housing supply in Madison.

Unfortunately, no funds were secured to help prepare additional reports or studies. As it is presently structured, the information that will be gathered to do both reports will come from available resources through either data collected by the City or Dane County, since the majority of any "affects" of Inclusionary Zoning activity will be manifested elsewhere in the County.

The outline has been reviewed by both the Housing Affordability Subcommittee of the Housing Committee, and the Housing Committee. The Housing Committee, at its meeting of November 2, 2005, unanimously approved the Evaluation Study framework with three changes. These changes were: Add a form that an IZ buyer would complete, add 'end buyers' as a part of the stakeholder groups interviewed for feedback on program regulation, and the effects on the school district. Those recommendations have been incorporated into the framework for the study.

Respectfully submitted,

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