

| Data Source Name | Web Address |
|------------------|-------------|
|------------------|-------------|

(local research items are shown in this font color)

Study Area

Name of the City for which the analysis is undertaken. County name is the name of the county. Much of the data used for this analysis is derived from county-level information (in many cases, the only data source available), so you will see the county name repeated, for reference, in other areas of the data input page.

HUD Median Income by County

Median income by County and a description of median income calculation methodology.

http://www.huduser.org/datasets/il/12008_docsys.html

Mortgage and Shelter Cost Assumptions

Mortgage assumptions are estimated by the analyst based on local conditions. Telephone research and interviews with housing market participants (realtors, mortgage brokers, etc.) is the typical approach. Shelter Cost % of Income refers to the share of gross household income devoted to housing (earnings plus any other disposable income, here estimated to be about 2% of earnings). Shelter cost equal to no more than 30% of income is a common guideline.

We suggest research that will yield three comparative prices for each mortgage and shelter cost assumptions, and that you take an average those. A good source for mortgage rate, term, down payment, and average condominium fee would be a local real estate

Number of Jobs per Worker

LED On The Map
press "text based tool" (upper right)
Enter county name at "Start Here:"
press enter and follow prompts

<http://lehdmap2.did.census.gov/themap/>

Census 2000 - SF3

Select Summary File 3 "detailed tables"
follow prompts to "Detailed Tables"

Table numbers needed for the analysis are shown adjacent to user input cells
This part of the analysis, Workers Per Household and Estimated Workers 21+ is used to estimate the average number of workers and number of jobs per household. The basic assumption is that there is one primary job, and slightly more than one non-primary job per household. (As can be seen from the analysis, number of jobs per worker and number of workers per household is, on average, greater than one.) Workers less

http://factfinder.census.gov/servlet/DatasetMainPageServlet?_program=DEC&_submenuId=&_lang=en&_ts=

QWI Online

Go to this gateway
Select "Click Here", then "Utah" data set

This dataset defines average earnings by county, for male and female workers. Average non-primary earnings are here estimated to be equal to average rate for female workers, (thought to be an appropriately conservative estimating approach).

<http://lehd.did.census.gov/led/datatools/qwi-online.html>

Estimated Household "Other" Income

Some households have sources of income other than wages. This parameter is an estimate of that other income, as a percent of wages, made under the assumption that this added income is both disposable (can and is likely to be used for any purpose) and consistent (an ongoing and predictable source of income). A baseline modeling assumption is say, 2% - which is appropriately conservative.

Household Size by County

Governor's Office of Planning and Budget, Baseline Projections
select - "Household projections by area"

<http://www.governor.utah.gov/dea/projections.html>

US Census Sub County Population Estimates

US Census Bureau
Click on "Utah". Save page as "text". Open in Excel and save as excel workbook

<http://www.census.gov/popest/cities/SUB-EST2006-states.html>

Households by Income - Utah State Tax Commission Summary Data

Contact Name: Tom Williams
Data source link (model page)
Data summary must be updated periodically, by Tax Commission personnel

[Model Page Data Source](#)

HUD Median Rent (50th percentile) by County

Select rent for # bedrooms, as appropriate for your analysis - 2 bedroom is typical if average household size is , for example, 3.4

<http://www.huduser.org/datasets/50per.html>

Median Single Family & Multi Family Listing Price

Realtor.com is a potential source for median price information. Check with them as to use of data for research purposes. Go to the site. Select city and state. (The data is available for cities only. Do this selection process multiple times, so as to include all cities, if your study area is a county. cities.) Select single family or multi-family, number of bedrooms, and then "view as list". Make a list of the all the prices shown. Use the Excel "Median" function to calculate median price

<http://www.realtor.com/Default.aspx>

Trend in Vacancy and Home Ownership Rate, and Personal Income

Statewide trends reported by the economic research department of the St. Louis Fed.

<http://alfred.stlouisfed.org/categories>

If you suspect that vacancy or home ownership rates in your area is significantly different than the state average, it may be advisable to investigate the potential causes.

Possible avenues of research include your local AOG, which may have a recent "windshield" survey, or informal telephone interviews with local landlords. If you can estimate your local rates, you can fill in values for "Examples City."

Number of Jobs and Earnings

US Census Bureau Local Employment Dynamics (LED) - Data tools
Select "Industry Focus"

Use the following as parameters for this query:

List the top 100 industries
Ranking Indicator = "rank by employment"
Include in report = "employment" & "average monthly earnings for all workers"
Age & Sex = "14-99" and "Male & Female"
Geography = "Utah"
Entity = "County"
Select Industry Level = "Industries"
Industry Sector = "All Sectors"
Select County name

Click "View Report"
Copy the data to the user input section "# Jobs & Earnings"

<http://lehd.did.census.gov/led/datatools/datatools.html>

Select "Industry Focus"

Housing Stock - Number of Units by Value

Single Family & Multi Family

Number of dwelling units by value is obtained from the County Assessor's office, and may also be available through your local AOG office (Association of Governments office). A sample data request form is included as part of this model. Use this form with assessor's office staff to request a count of single-family, and all other residential units, by value category (value categories for your study area are shown in the sample data request form). The count

[Sample Data Request form for County Assessor](#)
[Assessor & Assoc. of Governments Contact Info](#)

Market Rate Rental Units

The number of market rate rental units is obtained by local research. Check with your local landlords association, rental finding agencies, news paper research to identify significant properties whose management you can then contact, and local real estate agents.

Subsidized Rental Units

The number of subsidized rental units is obtained by local research. Check with the Utah Department of Community and Economic Development. You may also want to contact your local landlords association, rental finding agencies, news paper research to identify significant properties whose management you can then contact, and local real estate agents.

Note that the total number of dwelling units will likely not match the total number of households. Typically, the number of dwelling units will be greater. This may be accounted for by the presence of second homes, and other vacant units.

Housing Stock Growth Rate

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Building permit history (3 year average) and projections may be available from the local building official, and are an excellent starting point for estimating the trend in residential growth. Other potential avenues for this research include the following: your local AOG, MLS (if available), local homebuilders and homebuilder's associations, University of Utah Bureau of Business and Economic Research and of course, interviews with realtors. The objective is to define average annual percentage growth rates for owner units (single family and multifamily), market rate, and subsidized rentals.

The projection methodology is that these rates are used to define an average annual rate of increase for each market value category. In turn this is compared against average population growth rate (shown in the User Input section under "Future Number of Households") to define a net increase or decrease in the total housing stock (the net change in total units, for the +5 and +10 projection period). Besides this net change in the total housing stock, the value of this projection is to roughly estimate the deficit or surplus in each market value category.

Growth rate projection is not necessary for the model to function. It is optional. The model will show the current net affordable housing supply without the need to research and project growth rates. To complete the analysis without growth projection, set the growth rate cells to 0% if no projection will be made.

Persons per Dwelling Unit (potential overcrowding)

This dataset is from two US Census sources, shown at right. 1940 to 1990 is from the publication 1990 Census of Population and Housing - Population and Housing Unit Counts, Table 30. 2000 is from the 2000 Census, SF-3, Tables P1 and H1.

<http://www.census.gov/prod/cen1990/cph2/cph2-1-1.pdf>
http://factfinder.census.gov/servlet/DatasetMainPageServlet?_program=DEC&_submenuId=&_lang=en&_ts=

Population

This dataset is from two sources, shown at right. County and state data is from the Governor's Office of Planning and Budget. City data is from the current US Census Sub-County Population Estimates. City population for future years is projected based on the current year city share of county (projected as a constant)

Governor's Office of Planning and Budget, Baseline Projections
Select "Group Quarters Population"

<http://www.governor.utah.gov/dea/projections.html>

US Census Bureau
Click on "Utah". Save page as "text". Open in Excel and save as excel workbook

<http://www.census.gov/popest/cities/SUB-EST2006-states.html>

Population by Age

Governor's Office of Planning and Budget, Long Term Projections
Select "Detailed Demographic And Economic Projections" - then Population by Area, Gender, and Five Year Age Groups. Then select population by county for "Total."

<http://www.governor.utah.gov/dea/popprojections.html>

Population by age is not available from the GOPB at the city level. If you have a means to estimate your local population by age, you can fill in values for "Examples City Current."

Other Useful Data Sets

BLS Consumer Expenditure Survey
HUD Data Sets
USPS Vacancy Data
HUD Fair Market Rents
Section 8 income limits

<http://www.bls.gov/cex/>
<http://www.huduser.org/datasets/pdrdatas.html>
<http://www.huduser.org/datasets/usps.html>
<http://www.huduser.org/datasets/fmr.html>
<http://www.huduser.org/DATASETS/rl/rl07/index.html>

Utah Job Service - Economic & Labor Market Information
2002 NAICS Code List (text)
2002 NAICS Code List
NAICS Lookup Tables
Historic Census Data

<http://jobs.utah.gov/openems/wj>
<http://www.census.gov/epcd/naics02/naicod02.txt>
<http://www.census.gov/epcd/naics02/naicod02.htm>
<http://www.census.gov/epcd/naics02/>
<http://www.census.gov/population/www/censusdata/hiscendata.html>

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