

Housing Forward 2035

Connecting Housing, Jobs, and Opportunity

Atlanta Regional Commission

HR&A

Vision

ONE great REGION

Mission

Foster thriving communities for all within the Atlanta region through collaborative, data-informed planning and investments.

Values

Excellence | **Integrity** | **Equity**

Goals



Healthy, safe, livable communities in the Atlanta Metro area.



Strategic investments in people, infrastructure, mobility, and preserving natural resources.



Regional services delivered with **operational excellence** and **efficiency**.



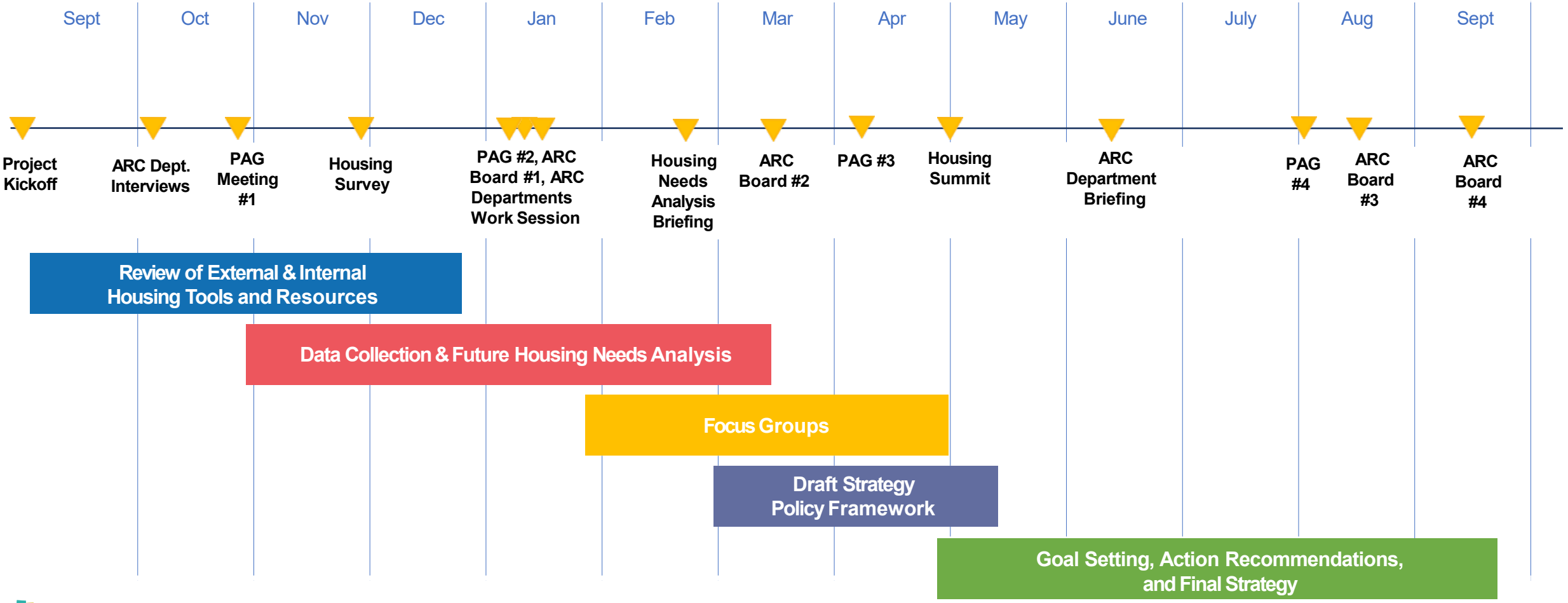
Diverse stakeholders engage and take a regional approach to solve local issues.



A competitive economy that is inclusive, innovative, and resilient.

Project Timeline

Over the past 11 months, HR&A has worked with ARC to develop the Housing Strategy for the Atlanta Region, which will guide region-wide efforts to address housing challenges.

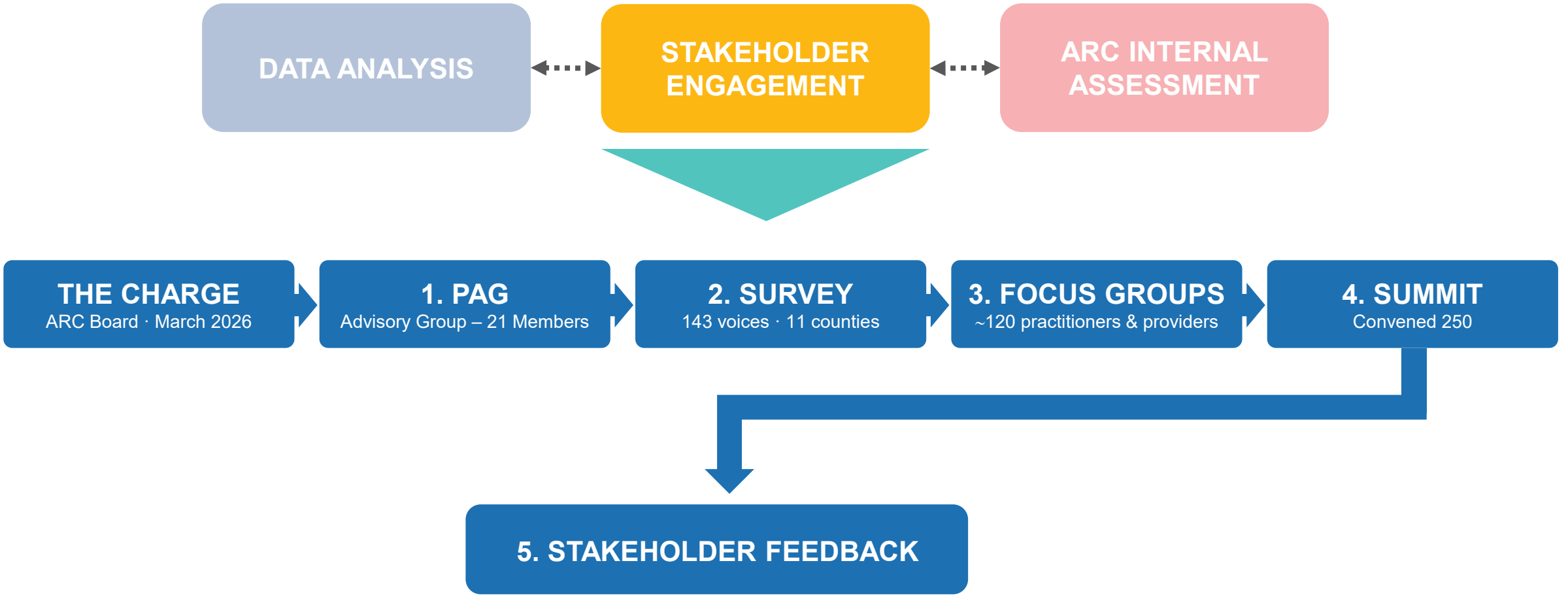


How We Got Here: Research & Data Analysis



- ARC Series 17 Forecasts + alternative growth forecasts, Housing Needs Assessment pipeline.
- Baseline tabulations of household growth, cost burden, tenure by AMI.
- Weighted-index suitability model that scores parcels across the 11-county region.

How We Got Here: Robust Analysis & Engagement



Land Use Coordinating Committee, Regional Housing Task Force, ULI Atlanta, ARC Board, and Atlanta Regional Housing Forum

Engagement Since the Regional Housing Summit

April 30 – July 16, 2026

May 20

Land Use Coordinating Committee (LUCC)

Planning directors, community development staff, and appointed officials from 14 city and county governments across the region, plus development authorities and planning consultants

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July 13

Briefing with Henry County Leadership

Chair of the Henry County Board of Commissioners — south metro county executive leadership

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July 15

Briefing with Gwinnett County Leadership

Chairwoman of the Gwinnett County Board of Commissioners — the region's second-largest county

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July 16

ARC Regional Housing Task Force

Elected officials and staff from 15 city and county governments, housing authorities, nonprofit and private developers, CIDs, philanthropy, state agencies, and universities

CUMULATIVE LOCAL GOVERNMENT REACH

Every Regional Housing Strategy engagement to date — focus groups, local government update, Summit, LUCC, and Task Force

10 of 11 counties

50 of 75 cities

70% of jurisdictions

How We Got Here: ARC Assessments



Aging & Independence Services

Live Beyond Expectations, Behavioral Health Coaching & Age Friendly Regional Action Plan

Community Development

Livable Centers Initiative (LCI), Community Development Assistance Program (CDAP), Regional Development Plan (RDP) & Comprehensive Plans

Natural Resources

Green Communities Certification; Resilience; Stormwater Management

Mobility Services

Transportation Management Assortations (TMA) & Community Improvement District (CID), Commuter data

Research & Innovation

Data and mapping information including

Transportation Planning

Metropolitan Transportation Plan (MTP), Transportation Improvement Plan (TIP), (Comprehensive Transportation Plan (CTP); Transit Oriented Development (TOD); Trail Plans

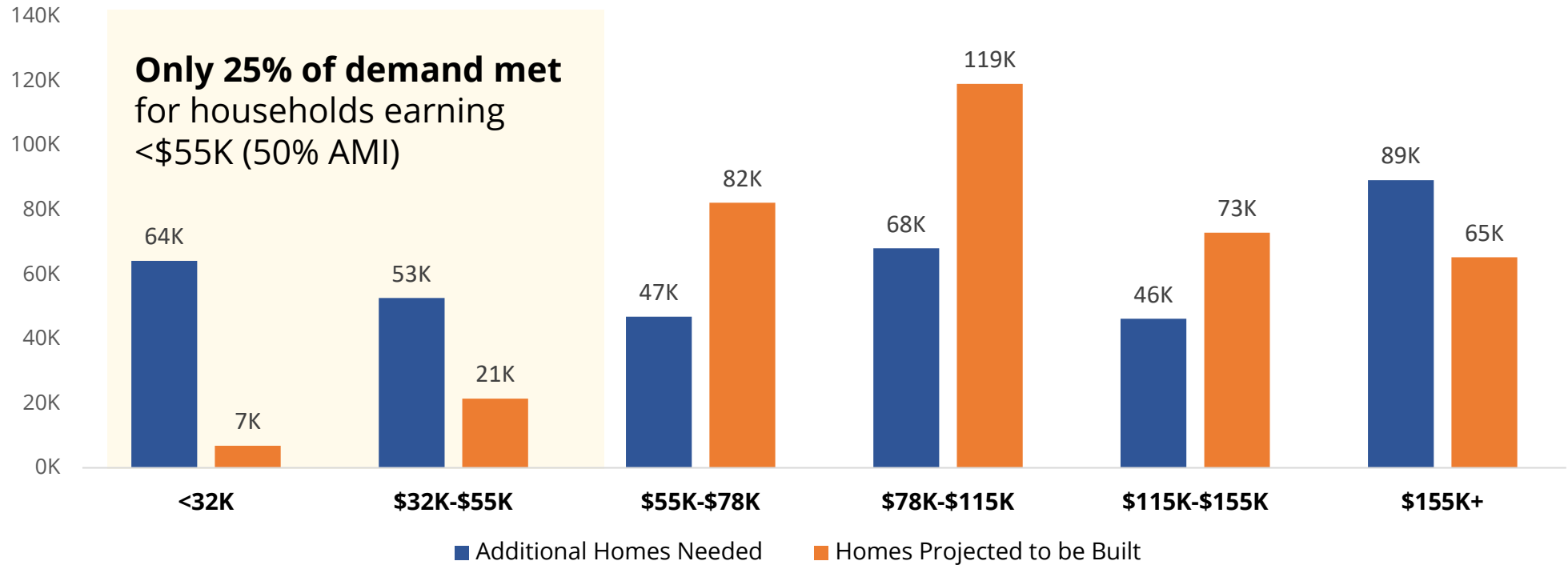
Workforce Development

Workforce Innovation and Opportunity Act (WIOA), employer engagement via Metro Atlanta Exchange (MAX)

The Challenge: The region is building homes — just not at the prices households need.

Additional Homes Needed vs. Projected to be Built by Affordability

11-County Region (2020-2035)



Source: ARC Series 17 Forecasts 2020-2035. Income ranges have been inflation adjusted to 2024 income levels. US Census Bureau Address Count Listings 2020-2024.

Regional Housing Strategy – 3 Goals

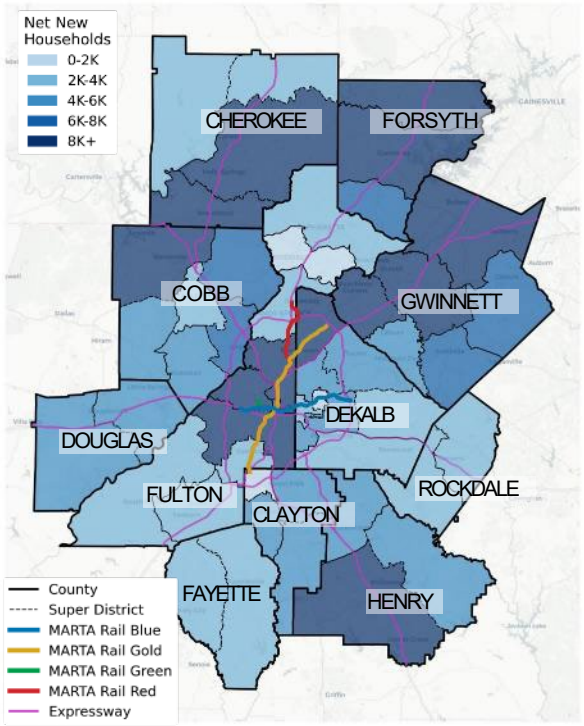
Goal 1

Build Strategically for Intentional Growth

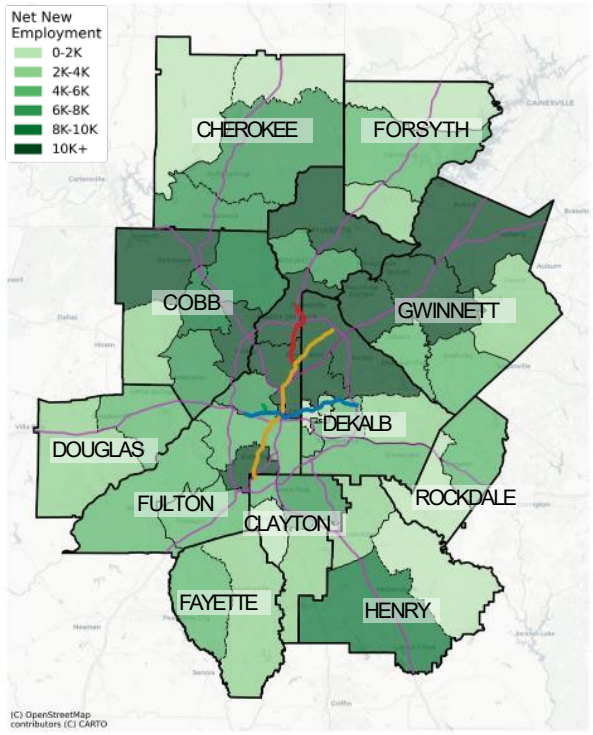
Target: 367,000 homes by 2035

Where homes are built matters: under current trends, growth is forecasted to continue sprawling outward, further away from major job centers and infrastructure, increasing commutes.

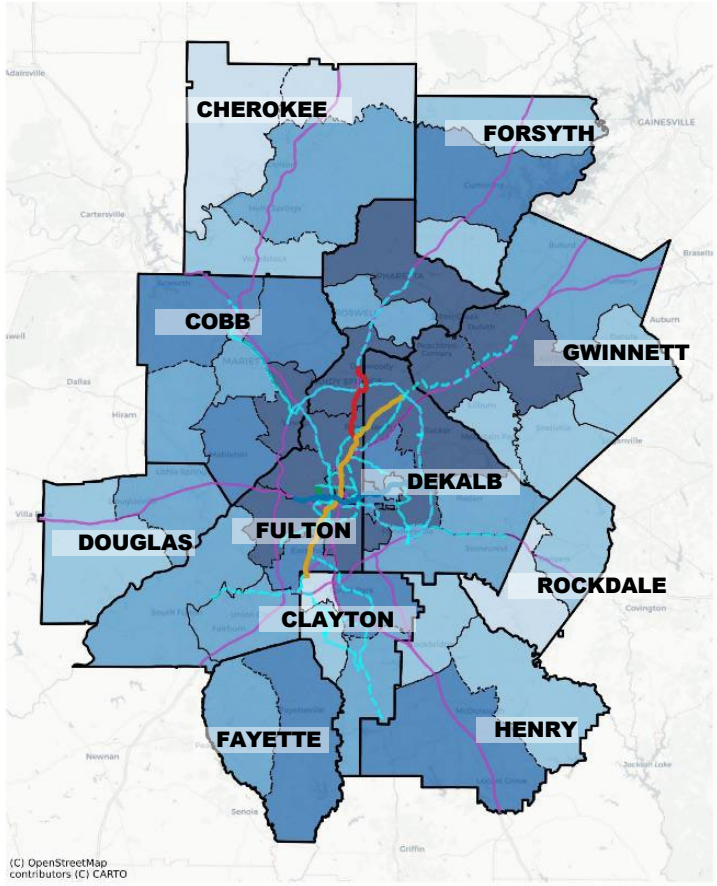
Household Change 2020-2035



Employment Change 2020-2035



Alternative Growth Scenario



*Source: ARC Series 17 Forecasts 2020-2040; *Highest opportunity tracts defined as top 10% of tracts according to HR&A's opportunity index measuring educational and economic outcomes, and access to amenities.*

Goal 1 What will it take?

1. **Align Housing with Job Growth**
   What if new households could afford to live within a 30-min commute of new jobs?

2. **Lower Housing + Transportation Costs**
   What would the region look like if new households lived within a ½-mile of transit?

3. **Increase Equitable Access to Opportunity**
   What if net new low-income households could find housing in high-opportunity tracts?

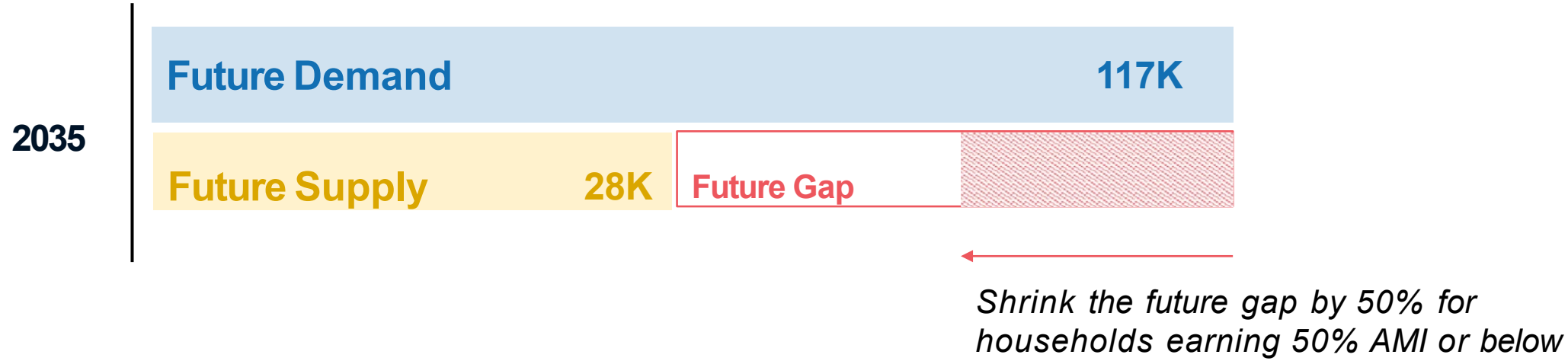
4. **Promote Climate Resilience**
   What would the region look like in 2035 if growth was limited in areas with high climate risk?

Goal 2 Close the Affordability Gap

Target: 50% reduction for low-income households

Future Housing Gap for Households Earning < 50% AMI

Household Income: <$55K **Rent Affordable: $1,350** **Home Price Affordable: $229K**



Shrink the future gap by 50% for households earning 50% AMI or below

Goal 2 What will it take?

4x

production increase

needed for new homes affordable to households earning <$55K.

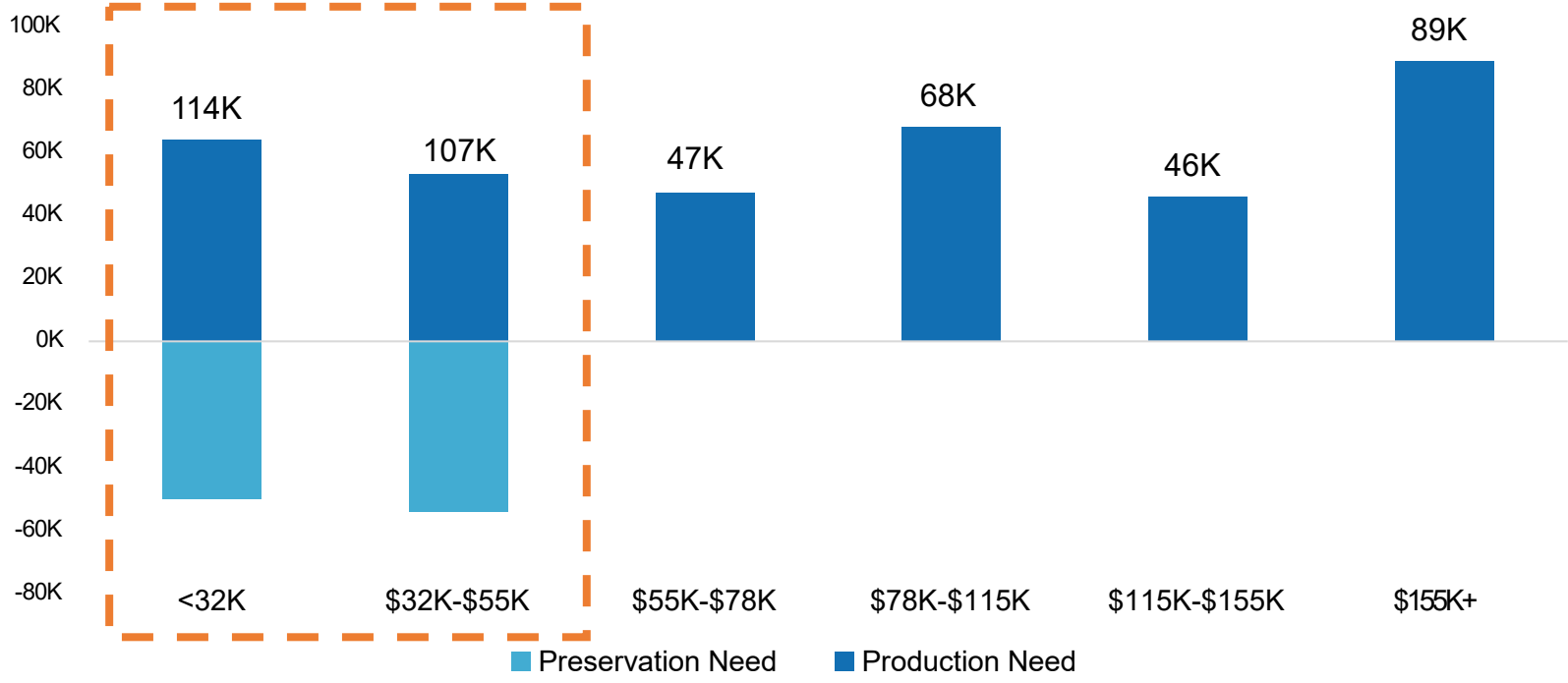
+104K

homes preserved

both deed-restricted and NOAH properties that are at risk of loss.

Total Future Housing Need by Income

11-County Region (2020-2035, Projected)



Source: HR&A Analysis of ARC Series 17 Forecasts; U.S. Census Bureau PUMS (2024); Zillow long-term price trends; HMDA buyer profiles (2022–2024)

Goal 3 Activate Vacant & Underutilized Properties

Target: Create new homes on 10% of the region's vacant and underutilized parcels.

1.7M Parcels

Within the 11-County region

HR&A analysis screened parcels by suitability for housing development based on physical suitability & policy alignment criteria

1,530
Publicly-Owned Parcels

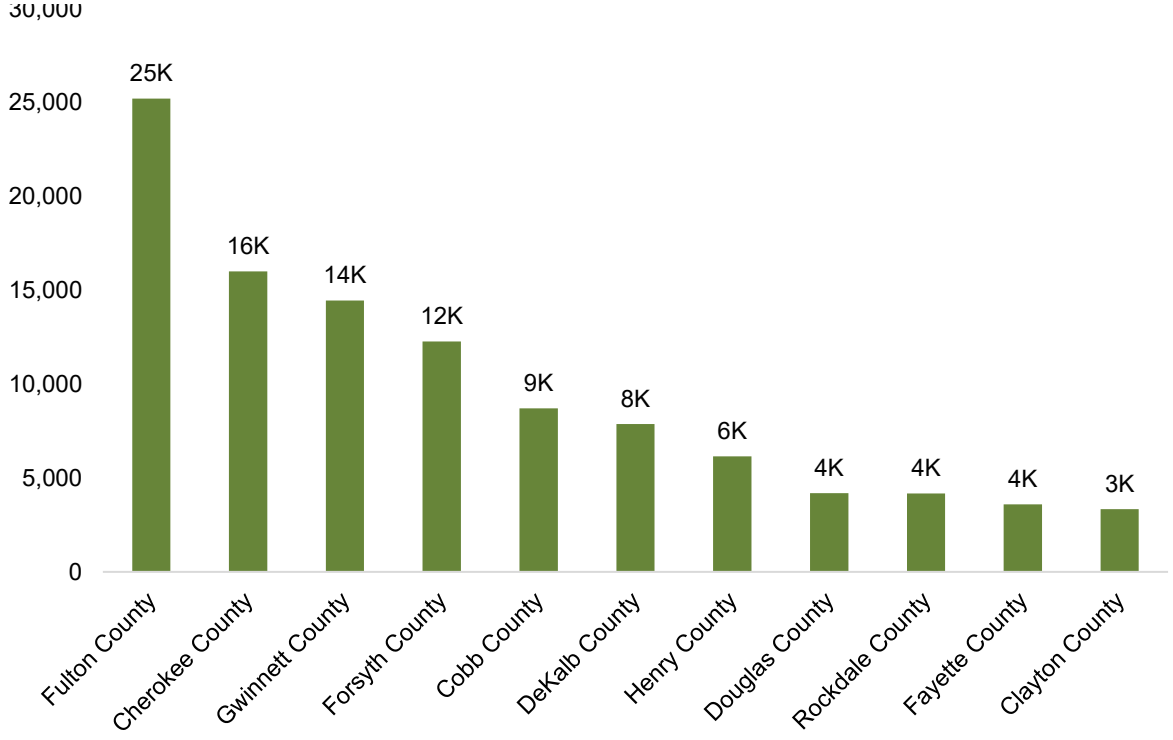
80	808	642
Vacant	Underutilized	Utilized

104,470
Privately-Owned Parcels

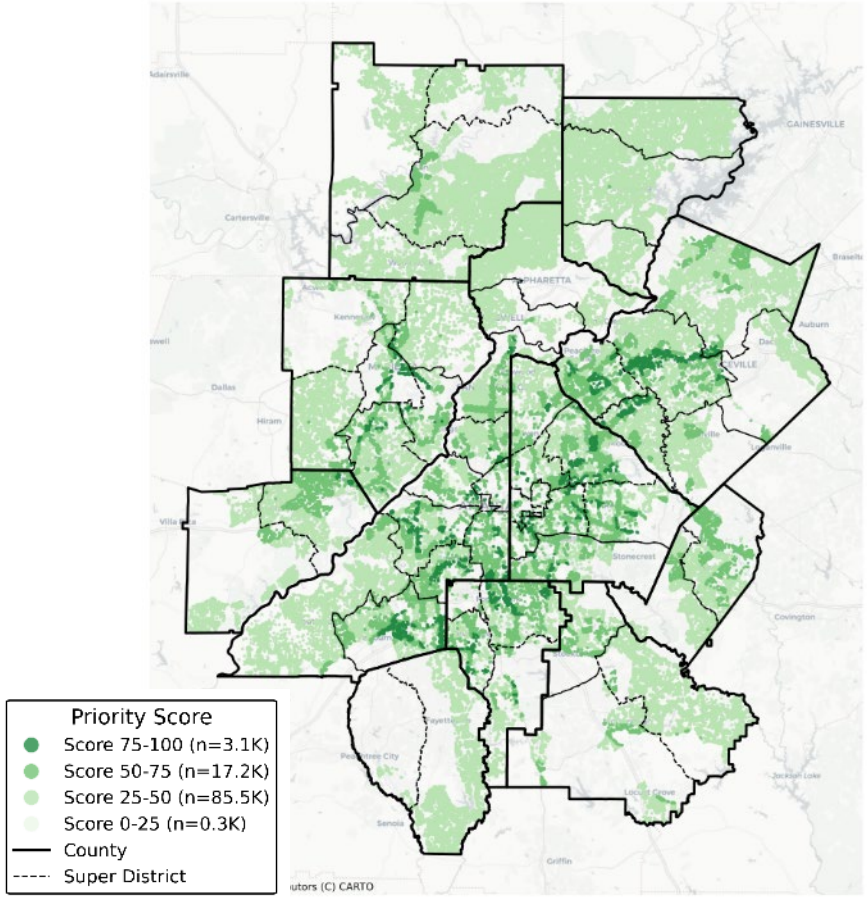
18,880	85,590
Vacant	Underutilized

Goal 3 What will it take?

Parcel Inventory by County
11-County Region



Parcel Assessment
11-County Region



*Note: Ownership and vacancy are based on standardized property use code in ATTOM

Goal 3

What will it take?

Activating at least 10% of the region's identified sites toward housing development will require establishing local processes to evaluate, prioritize, and activate sites for housing.

1. Refine **initial inventory** using local parcel, ownership, zoning & land use
2. **Prioritize sites** supportive of regional objectives
3. **Remove barriers** to development on priority sites
4. **Advance development** by tapping available resources & partnerships
5. **Create pipeline** of housing opportunity sites to be advanced over time

Question

Which of these goals resonate the most with you as an elected official and a regional leader?

Question

Which would be the most important to measure our progress towards to determine if we are having meaningful impact?

Regional Housing Strategy – 10 Housing Actions

10 Regional Housing Actions

Actions 1–5

1 Link ARC Transportation & Land Use Programs to Local Housing Actions	Revise scoring criteria in TIP, CTP, LCI, Special Studies, to further prioritize transportation projects that support housing production.
2 Create Regional Housing Ready Community Certification & Toolkit	Convene working groups with partners like ACCG, GMA, Homebuilders, develop a draft certification program, learn from similar initiatives in other regions.
3 Launch Regional Housing Dashboard To Track Progress	Work with Office of Research and Innovation to confirm metrics, scope of work, cost. Engage GA Tech, Federal Reserve, Zillow, as other potential partners.
4 Activate Underutilized Sites & Advance Transit-Oriented Development	Utilize local housing studies to prioritize sites for housing, work internally with Transportation Department for aligning transportation funds and externally with MARTA, URAs, Development Authorities.
5 Build on Momentum to Further Expand Funding for Production and Preservation	Engage major employers; convene funders like ANDP, CFGA, Invest Atlanta, Chamber to discuss scaling and advocacy.

ARC leads directly **ARC convenes and supports the partners who lead**

10 Regional Housing Actions

Actions 6-10

6 Engage Employers & Workers on Housing

Partner with Metro Atlanta Chamber and CIDs to engage major employers; engage universities like Emory, GA Tech, GSU.

7 Build a Regional Approach to Homelessness Prevention & Response

Convene Continuum of Care (CoC) leads, partners to develop a Regional Needs and Opportunity Assessment.

8 Develop a Regional Housing Communication Strategy

Convene elected officials, local governments, development community, partners to develop ways to comprehensively address opposition to housing, strengthen existing ARC educational offerings.

9 Identify, Convene & Educate on High-Impact State Policy Changes

Collaborate with GMA, ACCG, DCA, and housing advocacy organizations like HouseATL to identify potential policy areas for action in FY 2027 session.

10 Evaluate Ways to Increase Preservation & Stabilization Efforts

Collate existing efforts and organize key actors like ANDP, Enterprise, Community Land Trusts to identify new approaches for NOAH preservation.

ARC leads directly **ARC convenes and supports the partners who lead**

ONE great REGION

ARC

Questions

Do you agree with the actions we have identified for ARC to lead?

What would you change/add/remove?

Question

Where do you see elected leaders needing to lead on among these 10 actions?

Strategic Housing Targets

Creating a path to achieving goals and tracking progress

Regional Housing Production Targets, 2035

367K

Regional target
total homes targeted
by 2035

51%

Target Below 80% AMI

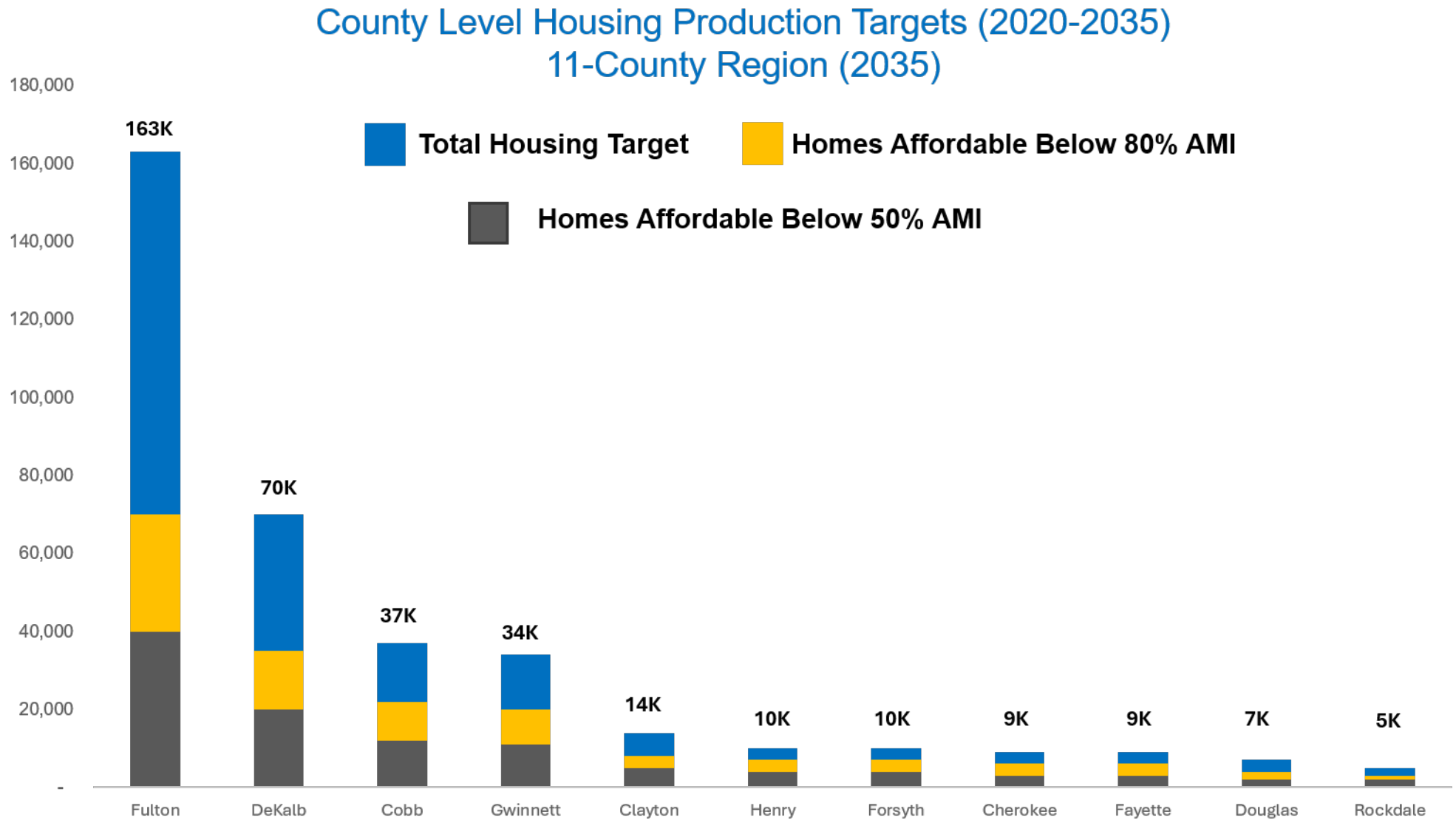
81K

affordable
50% to 80% AMI
(22% of regional target)

106K

affordable
below 50% AMI
(29% of regional target)

Housing Targets by County



Housing Targets by Region and County

Every county contributes as the region grows, and affordability leads the target

	Housing Production Target 2035 (icl. 5% Vacancy) (Rounded) *Growth Allocation Based on ARC Policy Goals*	50% AMI to 80% AMI Target	Percent	< 50% AMI Target	Percent
11-County Region	**367,000**	81,000	22%	106,000	29%
Fulton	**163,000**	30,000	18%	40,000	25%
DeKalb	**70,000**	15,000	21%	20,000	29%
Cobb	**37,000**	10,000	27%	12,000	32%
Gwinnett	**34,000**	9,000	26%	11,000	32%
Clayton	**14,000**	3,000	21%	5,000	36%
Henry	**10,000**	3,000	30%	4,000	40%
Forsyth	**10,000**	3,000	30%	4,000	40%
Cherokee	**9,000**	3,000	33%	3,000	33%
Fayette	**9,000**	3,000	33%	3,000	33%
Douglas	**7,000**	2,000	29%	2,000	29%
Rockdale	**5,000**	1,000	20%	2,000	40%

How ARC Will Activate the Strategy

Guide ARC's own investments — align LCI, CDAP, and TIP scoring and MTP/CTP updates with regional housing goals

Target technical assistance — sample ordinances, peer learning, and staff support where jurisdictions are advancing housing

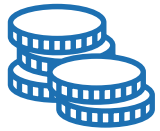
Ensure grant readiness — an adopted regional plan positions ARC and local governments to compete for federal and state housing funding

Track progress and stay accountable — county targets, the regional housing dashboard, and an annual impact report to this Board

Convene the five working groups — ARC-led tables engaging employers, regional housing fund partners, providers on homelessness prevention, and a shared communications strategy

Five Working Groups Will Deliver the Ten Actions

ARC will convene **5 Working Groups** that organize the **10 Actions** into coordinated teams of ARC staff, local governments, and regional partners.



Funding, Investment & Capital Allocation – Action 1: link ARC transportation & land use programs to housing progress – Action 5: regional housing fund feasibility



Land Use, Production & Preservation – Action 2: Housing Ready certification & toolkit – Action 4: activate sites & TOD – Action 10: preservation & stabilization



Accountability, Data & Goals – Action 3: the regional housing dashboard — county targets, progress metrics, and public reporting



Housing Stability & Homelessness Prevention – Action 7: a regional approach to homelessness, convening the region's four Continuums of Care



Partnerships, Communications & Policy – Action 6: employer engagement – Action 8: regional communications strategy – Action 9: state policy changes

Housing as Integral to Economic Mobility

Where You Live Determines Your School

Distance From Jobs Costs Workers Dearly

Cost Burden Kills the Ability to Save

Housing as an Economic Development Tool

Instability Causes Lasting Damage

Source: Chetty & Hendren (2018); HR&A Housing Strategy for the Atlanta Region (2026); Harvard Joint Center for Housing Studies

Housing Actions for Increased Economic Mobility

1	Increase supply across the income spectrum	*Actions 1, 2, 4*
2	Preserve affordable homes	*Action 10*
3	Promote housing stability	*Action 7*
4	Enhance capital resources	*Action 5*
5	Plan, track progress, and adapt	*Action 3*

What's Next

Next Steps for ARC

FEEDBACK

Identify the support, tools and action needed to advance progress and **implementation,** both externally and internally

HOUSING FORUM

The strategy be presented to the public

September 2, 2026, Atlanta Regional Housing Forum

ADOPTION

The full Housing Strategy will go before the ARC's board for adoption on September 9, 2026

Atlanta Regional Housing Forum

Thank you to the Project Advisory Group

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Chair
Gwinnett County Board of Commissioners

Carlotta Harrell
Chair
Henry County Board of Commissioners

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Questions?

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