



LOS ALAMOS

HOUSING MARKET NEEDS ANALYSIS, 2019

December 2019

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AMOUNTABLE

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Section 1. Executive Summary

A. Purpose of the Housing Market Needs Analysis

Los Alamos County is experiencing an acute shortage of housing. The lack of housing affects the quality of life of people who live and work in the county. It is also a problem for the local economy, which depends on a skilled labor force. Recognizing that a lack of housing of all types and in all price ranges exists in the County, Los Alamos County commissioned this housing market needs assessment that addresses current and future housing needs and future actions the County can take to meet these needs. The County's greatest housing challenge is the limited land available to meet immediate housing needs. Key strategies include identifying priority sites that can be developed in the short-term, including development of vacant residential properties, downtown redevelopment and higher density housing in some locations.

B. Policy Framework

The Los Alamos County Strategic Leadership Plan, the Los Alamos County Comprehensive Plan and the Economic Vitality Strategic Plan describe housing issues and recommendation actions by the County. The County is moving forward on the recommendations of these plans. An Affordable Housing Plan completed in 2010 provided recommendations to address the need for affordable housing. The issues in these plans have been identified through extensive public outreach and consideration by the County Council. Key housing recommendations from these guiding documents are summarized below.

1. Los Alamos Strategic Leadership Plan, 2019

The Strategic Leadership Plan identifies increasing the amount and types of housing options as a priority area. This includes "a variety of housing options for all segments of the community, from affordable, entry level, and live-work housing to new options for those interested in downsizing or moving closer to central areas of the community."

The Strategic Leadership Plan focuses on issues identified in adopted plans that have had significant public involvement, time and expertise. The housing priority area will implement the housing related recommendations of the 2016 Comprehensive Plan and the Los Alamos County Economic Vitality Strategic Plan.

2. Los Alamos County Comprehensive Plan, 2016

The Comprehensive Plan recognizes the need for more and different kinds of housing as well as protecting existing neighborhoods. Housing is important to the economic health of Los Alamos County. New housing development that expands opportunities for the local workforce to establish residence in Los Alamos will support population

growth, improve housing quality, help normalize housing prices, improve the local retail market, and keep spending in the local community.

The plan also recognizes the links between housing, economic development and infrastructure. Housing supports the ability of the County to thrive, and in turn coordination of planning for housing, infrastructure and economic development is essential to the quality of development in the County.

The Comprehensive Plan identified an inventory of buildable parcels within the County, on which a potential of 1,108 dwelling units could be constructed, including vacant homes, vacant lots, unplatted vacant residentially zoned land, and planned projects at a range of densities.

Comprehensive Plan Housing Goals

1. Provide a variety of housing types, sizes and densities
2. Promote development of housing stock that would accommodate downsizing households
3. Promote maintenance and enhancement of housing stock quality
4. Provide programs, regulations, and enforcement to help ensure that all housing is healthy and safe, and meets basic housing maintenance requirements
5. Promote turning vacant housing back into safe and viable homes
6. Allow and encourage housing for older adults and people with disabilities, including designs that allow for independent living, various degrees of assisted living, and/or skilled nursing care

3. Economic Vitality Strategic Plan (ESVP), 2019

An EVSP goal is to “increase the availability of quality housing in the County, both affordable and market rate.”

The EVSP lists a number of actions and strategies for accomplishing this goal. This housing market needs analysis defines current housing demand, which is the first action listed in the 2018 housing goal. Additional actions identified in the EVSP include:

- Identify and assess developable properties
- Produce quality housing to meet demand
- Provide financial assistance for affordable housing
- Reinforce neighborhood beautification, which includes maintaining the existing affordable housing stock

4. Los Alamos Affordable Housing Plan, 2010

The 2010 Housing Plan focused on affordable housing needs and assessed the local housing market, including analysis of owner occupied and rental housing, housing for sale and for rent, special needs housing, land use and policy considerations, and development costs.

The plan recognized the shortage of privately owned, developable land and the best opportunity for additional developable land through land transfers.

A land use and policy review pointed out the existing low-density housing pattern and the potential for higher densities. The plan recognized the code incentives that are in the development code, including accessory dwellings allowed in some residential districts, high-density mixed-use projects allowed in downtown overlay districts, and reduced parking requirements for mixed-use projects.

An analysis of the development process and related fees found that Los Alamos County's process does not present a barrier to development.

Due to the dramatically changed housing climate in the County and the length of time since the last Affordable Housing Plan was drafted, it may be time to update that plan to reflect the different needs pertaining to affordable and workforce housing.

C. Report Contents

The Housing Market Needs Assessment includes the following sections in addition to the Introduction:

Community Profile. The Community Profile updates key indicators related to demographics, household characteristics and the local economy in Los Alamos County.

Housing Market Analysis. The Housing Market Analysis updates information on the current housing market, including housing conditions and the cost and availability of housing for sale and for rent.

Housing Needs Assessment. The Housing Needs Assessment identifies needs for affordable and market rate housing based on demographics, the local economy, needs expressed by local employers, and the housing preferences of people who live and work in Los Alamos County.

Land Use and Policy Recommendations. The Land Use and Policy Recommendations are not a complete update to the 2010 Affordable Housing Plan or a thorough look at the impact of local regulations and policies affecting housing production. However, land use and local policy issues were mentioned in focus groups and surveys. The topics that were mentioned by the public are summarized in this chapter.

Appendices. The appendices include detailed summaries of public outreach results and detailed characteristics of housing for sale.

D. Methodology

1. Data Collection

The community profile and base information about the housing market and housing needs was collected from third party sources. Data sources include the following:

- Historical information from the 2010 Affordable Housing Plan
- US Census, American Community Survey, Five-Year Estimates, 2013-2017
- A survey of rental properties in Los Alamos County
- MLS housing sales data
- A review of available rental housing through on-line sources, including LANL student and post-doc housing sites, Craigslist, Zillow and Realtor.com.

2. Focus Groups

Three focus group discussions were held in August 2019. These groups included local employers, real estate and lending professionals, and Los Alamos National Laboratory. Each group contributed knowledge of housing needs from the respective employers, the impact of housing on their organizations, and their perceptions of barriers to meeting housing needs and potential solutions.

3. Surveys

Two surveys were conducted to get information about housing needs from the perspective of local businesses and from community residents and the local workforce. A link to the online Employer Housing Needs Survey was sent to local businesses through the Los Alamos Commerce and Development Corporation email list and the Los Alamos County business license contact list. A link to the online Community Housing Preferences Survey was advertised through local media and sent to local employers to distribute to their employees. Paper copies of the survey were distributed at the local farmers market and through senior centers. A total of 46 employer surveys and 951 community surveys were returned. Survey results are summarized in Appendix B.

Many who responded to the survey were people who are dissatisfied with their current housing and would consider moving and people who are have another interest in housing. Some local residents are concerned about the amount and scale of new development, traffic impacts and loss of open spaces. Others are advocates for housing because of the impact on their employees or coworkers or because family members need housing.

Commuting data indicates that half of the people who work in the County commute in from outside of the County, but only 15 percent of the survey respondents commute in. The commuters who responded to the survey overwhelmingly indicated that they would consider moving.

E. Summary of Findings

The report findings are based on data analysis and analysis of focus group and survey results. Housing is clearly a major concern for local employers, the local workforce, and community residents.

Several issues emerged from the analysis. These are described below as common recurring themes and housing preferences.

1. Recurring Themes

• Limited Housing Choices

- Focus group participants are supportive of higher densities, including housing types referred to as the “missing middle” that are compatible in scale with detached single-family homes and help create walkable neighborhoods. Townhomes, duplexes and small-scale apartment buildings in residential neighborhoods are examples of this. As promoted in the Comprehensive Plan, higher densities are desired in the Los Alamos Townsite and White Rock town centers. Multi-story mixed use buildings that are allowed by the development code in the MU, DT-NGO, DT-NCO, DT-TCO.
- New housing projects provide some diversity in type. However, most proposed units are either single family detached or apartments. One development in process is townhouses, an example of the type of housing that could make maximum use of the limited land supply at prices affordable for middle income families.
- First time homebuyers, middle- and low-income households cannot find housing at a price they can afford. The supply of smaller homes on smaller lots is limited.
- Companies with well-paid professional and technical staff have difficulty recruiting because prospective hires cannot find housing and the age and quality of housing available is not what people are expecting for the price.
- Postdocs and students who work at LANL have a difficult time finding any kind of housing. This was mentioned by focus group participants who are familiar with the need for short-term housing for lab employees. It was also evident in web sites that have been set up to connect potential tenants with landlords. Demand for housing significantly outnumbers supply.
- The extremely tight housing market, coupled with limited choices, means that residents cannot easily move from one housing type to another as their needs change.
- New housing projects are either market rate, with home prices starting at about \$400,000, or affordable with federal subsidies and targeted to households with incomes of about \$60,000 or less for a family of four. Housing affordable to households within income between \$60,000 and \$100,000 is missing from this mix.

- **Need for Housing to Meet Demand**

- This market analysis identified an immediate need for 1,310 units of rental housing and 379 units for homeownership. The need is distributed among all income ranges but is particularly acute for middle- and lower-income households.
- Annual hiring at LANL will bring new employees to the community every year for the next three to five years. Some of these employees are replacing retirees and others are to fill positions created by the growth of LANL's mission. There were 1,500 positions still left unfilled at the time this document was drafted.
- An increasing number of retirees are choosing to remain into the County after retirement for a variety of reasons, including proximity to family and the lifestyle of the community.
- Very few homes were for sale or for rent in September 2019. The turnover in housing, with a sales volume of a few hundred units a year does not support the 1,000 new positions at LANL or the housing needs of other local employers.
- The County has had recent success in attracting new development, including homes for sale and housing for rent. These projects, which are evidenced by the housing developments at Mirador and on DP Road, are in early development stages.
- Private developments in process include the redevelopment of the Black Hole property. These projects are relatively small, but they will add housing to the inventory.
- There is a perceived risk of developing property in a market that is dominated by a single employer that is dependent on the Federal budget. The mission, programs, and funding for the lab is cyclical. The impact of the cycles on housing can be seen in the change in median sales price over time for the County.

- **Limited Land Supply and other Development Challenges**

- ***There is limited land available that is suitable for development, and the size of parcels is relatively small. Production builders cannot achieve the economies of scale needed to make development worthwhile.***
- New housing has taken time to come to fruition. Focus group participants and survey responses suggest several reasons for this. Development is expensive in Los Alamos County because topography and subsurface soil conditions, and construction labor and materials come from a relatively long distance. New buildings at LANL create competition for construction crews which drives up prices. As a result, housing development costs are about 30% higher in the County than in larger nearby markets. Developers may not be attracted to the county because of the cost of doing business.
- Both local business leaders and community members recognize that the County's vacant and open space properties represent an opportunity to increase the housing supply in the County.

- Most of the properties mentioned as potential housing sites at meetings and in survey responses as potentially developable sites have been mentioned in prior studies.
 - If the County and LANL determine that a housing crisis currently exists, they should review all County properties, including those listed in Ordinance 252 and Ordinance 254, each of which is An Ordinance Establishing a Land Preservation Status for Certain Developed Public Lands, to prioritize County properties for housing. The County would follow a public process with a 90-day review period for public input once an ordinance to change status has been introduced.
- **Housing Affordability**
 - The high median income in Los Alamos County is a result of the highly paid professional and technical jobs at Los Alamos National Laboratory.
 - Other industry classifications, such as workers in education, government, retail and service industries, have wages that are similar to the state average. As a result, people with more modest incomes who compete with higher income households for housing are priced out of the market. This is an issue for employers who have difficulty recruiting.
 - The number of housing units set aside for income eligible households decreased by 31 units with the foreclosure and sale of Caballo Peak Apartments. Projects financed with low-income housing tax credits must meet eligibility requirements for at least 30 years after project completion, and preservation of affordable housing will become more important as existing tax credit projects age.
 - Because of the recognized housing need, Los Alamos County is identified as a Tier 1 community, which gives it a competitive advantage in the statewide competition for projects financed in part through tax credits.
- **Aging Housing Stock**
 - Housing prices are very high for the age and quality of housing. This is true for both housing for sale and housing for rent.
- **Coordinating Housing with Planning for Utility Infrastructure, Transportation, Schools and Other Land Use Planning**
 - Residents in the Townsite and White Rock are concerned that infill and increasing densities in Los Alamos and White Rock will have an impact on existing infrastructure, and traffic congestion in particular.
 - Coordination and augmentation of transit service that most efficiently provides connections between new housing to the laboratory and other strategic locations within the County.
 - The LAPS Facilities Master Plan identifies school needs based in part on anticipated growth in school age population within school attendance zones. Planned projects will impact classroom needs. Planning for new housing should be coordinated with the facility plan. This includes consideration of LAPS-owned properties as well as development that includes families.

- County-owned properties that are included in the special land preservation status established in Ordinances 252 and 254 can be considered for removal from this status by ordinance, which would require public input.

- **Importance of Housing to Economic Development**

- Most employers that participated in focus groups or responded to the employer survey have unfilled positions, in part because new hires cannot find housing.
- Survey responses from prospective LANL hires indicate that lack of housing is a major consideration when these highly skilled scientists are weighing job opportunities.

2. Housing Preferences

- The community input regarding housing preferences is consistent: young singles and married couples with no children often prefer to locate in Santa Fe because of the activities there; workers with low to mid-range salaries may prefer to live in the valley rather than on the hill because there are more affordable housing choices; families with school age children may prefer to live in Los Alamos County because of the excellent schools.
- Responses to the community survey indicate a preference for single family detached housing, similar to what is prevalent in Los Alamos County now. However, there are people who would consider smaller houses with smaller yards, townhomes and apartments.
- Three bedrooms, two bathrooms and two garage spaces are the most common preferred housing characteristics.
- While a majority of people who responded to the community survey would consider moving, families with adult children who want to live and work in the County have particularly strong opinions about the need for additional housing. As one respondent noted, "I do not want my daughter to live with us forever."

Section 2. Community and Housing Profile

The Incorporated County of Los Alamos is located in north central New Mexico, approximately 35 miles northwest of Santa Fe. The County is the home of Los Alamos National Laboratories, which is the County's major employer. The estimated 2017 population in the County is 18,031, and the estimated 2018 population is 19,101. Population estimates for 2018 are not yet available for the two communities in the County, but the 2017 estimates were 12,035 for Los Alamos townsite and 5,878 for White Rock. The County is predominantly public land, including Los Alamos National Laboratories, a portion of Bandelier National Monument, and the Santa Fe National Forest.

The community and housing profile describe population, housing and economic trends in the County that influence the demand for housing.

Data sources include the following:

- US Census, American Community Survey, Five-Year Estimates, 2013-2017
- A survey of rental properties in Los Alamos County
- MLS housing sales data
- A review of available rental housing through on-line sources, including LANL student and post-doc housing sites, Craigslist, Zillow and Realtor.com

Information regarding population trends, household characteristics, incomes, jobs and wages shall be used to identify housing needs of the current population and what is affordable based on typical wages.

There are several demographic and economic trends affecting housing needs:

Growth. While the population of the County has grown at a relatively slow pace, primarily due to the limited availability and relatively high cost of housing, employment is increasing. Expansion of the mission of Los Alamos National Laboratory and the increased emphasis on innovation and transfer of technology have increased job growth outside of the lab. A commensurate increase of employment in other industry classifications would be expected to support job growth in professional and technical services. This is a distinctly different scenario than the decreasing population and employment in 2010. The demand increase created by a booming job market puts upward pressure on prices unless the supply of housing can increase to meet demand.

Age. The County's housing stock is aging, with 3,755 units, which is 44.5 percent of the existing housing supply, more than 50 years old. There is a need for renovation or replacement of older properties.

Retirees Aging in Place. Focus group participants reported that more retirees are choosing to remain in Los Alamos County as multigenerational families have established roots in the community. This means that fewer homes are sold as fewer retirees leave the community. The supply of senior housing is limited, which means that

as retirees stay in the community, they have limited options for downsizing, if that is their goal.

Young People Staying. As part of the increase in multigenerational families, young adults are choosing to find jobs in Los Alamos County and stay in the community. This phenomenon was mentioned by respondents to the community survey who noted that their adult children are living at home because they cannot find housing.

Income Disparities. The professional and technical wages prevalent in Los Alamos County are much higher than the state average. However, other types of jobs pay approximately the same as the state average. The impact on housing is that higher wage workers can “outbid” lower wage workers in a market where the supply is not expanding to meet demand. Increased demand coupled with a stagnant supply is putting upward pressure on housing prices.

A. Community Profile

1. Demographic Profile

The demographic profile updates key indicators of change over the past ten years. The demographic profile describes historical and recent population trends,

a) Population Trends

Los Alamos County population has fluctuated slightly between 2000 and 2018. The population estimate for Los Alamos County for 2018 is at the highest point during the past 19 years. The Los Alamos County population has increased 4 percent since 2000. This includes recovery from slight dips in 2010 and from 2013 to 2015.

Table 1. Population Trends

	US Census (as of April 1)		Census Population Estimates (as of July 1)							
	2000	2010	2011	2012	2013	2014	2015	2016	2017	2018
New Mexico	1,819,046	2,059,179	2,080,395	2,087,549	2,092,792	2,090,342	2,090,211	2,092,789	2,093,395	2,095,428
Los Alamos County	18,343	17,950	18,229	18,238	17,950	17,807	17,830	18,239	18,804	19,101

Source: US Census 2000, US Census Bureau, Population Division, Annual Estimates of the Resident Population, April 1, 2010 to July 1, 2018 (PEPANNRES)

The population of Los Alamos County has been consistent at roughly 18,000 people for the past 20 years. Because there is an extremely limited supply of developable land, economic growth in Los Alamos County has not resulted in population growth. People who work in the County commute from surrounding communities.

2. Household Characteristics

Since 2000, the number of households in the County has ranged from 7,500 to 7,600 households, according to the Census and Census estimates. During this time,

household characteristics have changed somewhat, with the number of family households decreasing, and the number of nonfamily households increasing. The most dramatic changes have been in the number of female headed family households and the number of nonfamily households with a householder who is 65 years old and older. Family households are 66 percent of all households, down from 71 percent in 2000. The percentage of all households that are nonfamily households headed by seniors has increased from 7 percent to 11 percent.

Table 2. Household Characteristics and Trends, 2000-2017

Los Alamos County	2000	2010	2017	% Change 2000-2010	% Change 2010-2017
Total households	7,497	7,663	7,525	2.21%	-1.80%
Family households (families)	5,341	5,199	4,969	-2.66%	-4.42%
Married couple	4,703	4,451	4,300	-5.36%	-3.39%
Male householder (no wife present)	426	258	215	-39.44%	-16.67%
Female householder (no husband present)	212	490	454	131.13%	-7.35%
Nonfamily households	2,156	2,464	2,556	14.29%	3.73%
Householder living alone	1,869	2,183	2,292	16.80%	4.99%
65 years and over	504	697	842	38.29%	20.80%
Average household size	2.43	2.33	2.38	-4.12%	2.15%
Average family size	2.92	2.86	2.99	-2.05%	4.55%

Source: US Census, American Community Survey 5-year estimates 2013-2017

3. Income

The median household income has increased steadily since 2000, with a 2017 median household income of over \$110,000 in 2017. HUD has established income limits for Federal programs, and the state has established Los Alamos County income limits approved by the New Mexico Mortgage Finance Authority (MFA) for programs that are funded through the County. The MFA income limits recognize that moderate income households cannot afford housing in Los Alamos County without assistance. The following sections describe the income characteristics of County households, and Federal and state income limits are described at the end of the chapter.

a) Income Distribution

Los Alamos County is more affluent than the rest of the state of New Mexico. While most household incomes in Los Alamos County are greater than \$50,000, approximately twenty percent of households have lower incomes.

Table 3. Household Income Distribution, 2000-2017

	2000		2010		2017	
Total households	7,495		7,566		7,525	
Less than \$10,000	262	3.5%	100	1.3%	258	3.4%
\$10,000 to \$14,999	134	1.8%	40	0.5%	206	2.7%
\$15,000 to \$24,999	403	5.4%	266	3.5%	217	2.9%
\$25,000 to \$34,999	429	5.7%	331	4.4%	263	3.5%
\$35,000 to \$49,999	822	11.0%	675	8.9%	523	7.0%
\$50,000 to \$74,999	1,479	19.7%	1,141	15.1%	870	11.6%
\$75,000 to \$99,999	1,409	18.8%	1,029	13.6%	1,149	15.3%
\$100,000 to \$149,999	1,880	25.1%	1,973	26.1%	1,840	24.5%
\$150,000 or more	677	9.0%	2,011	26.6%	2,199	29.2%
Median household income	\$78,993		\$103,643		\$110,190	

Source: US Census, American Community Survey 5-year estimates 2013-2017

The median income for Los Alamos (\$110,190) is more than double the state median of \$46,718. Over fifty percent of households have a household income of over \$100,000 annually.

Family incomes are higher than nonfamily incomes, primarily because nonfamily households are householders living alone. These include single working age adults and retirees.

Table 4. Family and Nonfamily Household Incomes

Income Range and Household Type	2010		2017	
Families	5,248		4,969	
Less than \$10,000	66	1.30%	43	0.90%
\$10,000 to \$14,999	5	0.10%	100	2.00%
\$15,000 to \$24,999	52	1.00%	59	1.20%
\$25,000 to \$34,999	92	1.80%	83	1.70%
\$35,000 to \$49,999	328	6.30%	274	5.50%
\$50,000 to \$74,999	542	10.30%	487	9.80%
\$75,000 to \$99,999	802	15.30%	683	13.70%
\$100,000 to \$149,999	1,570	29.90%	1,251	25.20%
\$150,000 or more	1,791	34.13%	1,989	40.03%
Median household income	\$118,993		\$133,523	
Non-Families	2,318		2,556	
Less than \$10,000	34	1.47%	215	8.41%
\$10,000 to \$14,999	35	1.51%	106	4.15%
\$15,000 to \$24,999	214	9.23%	158	6.18%
\$25,000 to \$34,999	239	10.31%	180	7.04%
\$35,000 to \$49,999	347	14.97%	249	9.74%
\$50,000 to \$74,999	599	25.84%	383	14.98%
\$75,000 to \$99,999	227	9.79%	484	18.94%
\$100,000 to \$149,999	403	17.39%	624	24.41%
\$150,000 or more	220	9.49%	157	6.14%
Median household income	\$60,353		\$73,700	

Source: US Census, American Community Survey 5-year estimates 2013-2017

Owner occupied housing represents 74 percent (down from 77 percent in 2010) of occupied housing units in Los Alamos County, but the number of renters is increasing. Incomes of homeowners are significantly higher than the incomes of renters.

Table 5. Income by Tenure

Income Range and Tenure	2010		2017	
Owner occupied:	5,840		5,543	
Less than \$10,000	53	0.91%	135	2.44%
\$10,000 to \$14,999	19	0.33%	79	1.43%
\$15,000 to \$24,999	68	1.16%	75	1.35%
\$25,000 to \$34,999	154	2.64%	143	2.58%
\$35,000 to \$49,999	338	5.79%	274	4.94%
\$50,000 to \$74,999	745	12.76%	571	10.30%
\$75,000 to \$99,999	846	14.49%	669	12.07%
\$100,000 or more	3617	61.93%	3,597	64.89%
Renter occupied:	1,726		1,982	
Less than \$10,000	47	2.72%	123	6.21%
\$10,000 to \$14,999	21	1.22%	127	6.41%
\$15,000 to \$24,999	198	11.47%	142	7.16%
\$25,000 to \$34,999	177	10.25%	120	6.05%
\$35,000 to \$49,999	337	19.52%	249	12.56%
\$50,000 to \$74,999	396	22.94%	299	15.09%
\$75,000 to \$99,999	183	10.60%	480	24.22%
\$100,000 or more	367	21.26%	442	22.30%

Source: US Census, American Community Survey 5-year estimates 2013-2017

b) Cost Burdened Households

Housing is considered to be affordable when a household pays no more than 30 percent of income on housing and utilities. Households who pay more than 30 percent of income for housing are considered to be cost burdened.

The table below shows the number of owners and renters by income that experience a cost burden. Overall, 14 percent of households pay more than 30 percent of income for rent. This includes 10 percent of owners and 25 percent of renters. Cost burdened owners and renters typically have incomes below \$50,000.

Table 6. Cost Burdened Households by Tenure and Income Range

Households by Income Range and Tenure	Number of Households	Households Paying 30% or More for Housing	Percent Cost Burdened by Income
Total Households:	7,525	1036	14%
Owner-occupied housing units:	5,543	534	10%
Less than \$20,000:	201	159	79%
\$20,000 to \$34,999:	197	72	37%
\$35,000 to \$49,999:	274	85	31%
\$50,000 to \$74,999:	571	132	23%
\$75,000 or more:	4,266	86	2%
Zero or negative income	34	NA	NA

Households by Income Range and Tenure	Number of Households	Households Paying 30% or More for Housing	Percent Cost Burdened by Income
Renter-occupied housing units:	1,982	502	25%
Less than \$20,000:	218	218	100%
\$20,000 to \$34,999:	199	155	78%
\$35,000 to \$49,999:	249	115	46%
\$50,000 to \$74,999:	289	14	5%
\$75,000 or more:	881	0	0%
Zero or negative income	95	NA	NA
No cash rent	51	NA	NA

Source: US Census, American Community Survey, 5-Year Estimates, 2013-2017

c) Program Income Limits

Eligibility for housing assistance is based on household income. Income limits for various housing programs vary by type of program and funding source. Programs that are targeted to home buyers and homeowners offer assistance to low- and moderate-income buyers. These programs are a significant asset to middle income buyers in Los Alamos County where professional and technical incomes are very high compared to incomes in other industries.

Los Alamos County Housing Programs Income Limits

Los Alamos County received permission to use the true 80% Area Median Income limits for all affordable programs funded through the County, as opposed to being restricted to the national AMI limit for federally funded programs. These income limits allow the County to potentially assist a broader number of households, such as those with incomes of up to \$96,640 for a family of four with the homebuyer assistance and home renewal programs.

Table 7. Los Alamos County Programs Income Limits

	Persons in Family					
	1	2	3	4	5	6
Very Low (50%) Income	\$42,300	\$48,350	\$54,400	\$60,400	\$65,250	\$70,100
Low (80%) Income	\$67,680	\$77,360	\$87,040	\$96,640	\$104,400	\$112,160

HUD Income Limits

HUD income limits apply to federally funded programs, including Housing Choice Vouchers. These income limits are separate from the income limits established for County-funded programs. The 2019 HUD median family income in Los Alamos County is \$135,500. Table 8 shows HUD income limits by household size for 2019.

Table 8. 2019 HUD Income Limits for Los Alamos County

% of AMI	Persons in Family							
	1	2	3	4	5	6	7	8
Extremely Low (30%) Income	\$25,400	\$29,000	\$32,650	\$36,250	\$39,150	\$42,050	\$44,950	\$47,850
Very Low (50%) Income	\$42,300	\$48,350	\$54,400	\$60,400	\$65,250	\$70,100	\$74,900	\$79,750
Low (80%) Income	\$52,850	\$60,400	\$67,950	\$75,500	\$81,550	\$87,600	\$93,650	\$99,700

Source: HUD Exchange

MFA Income and Acquisition Cost Limits for Los Alamos County

The MFA sets income limits that are higher than either County or HUD limits for certain of its programs in targeted areas. These programs can help bridge financing gaps for moderate income buyers in high cost areas like Los Alamos County. The higher income limits are appropriate for moderate income homebuyers.

Income and home purchase price limits for 2019 are shown in Table 9.

Table 9. 2019 MFA Income and Purchase Price Limits by Program

MFA Program	1 to 2 Person Household	3 or More Person Household	Purchase Price Limit
FIRSTHome and FIRSDown	\$135,500	\$155,825	\$369,501
NEXTHome	\$91,000	\$91,000	\$340,000
HOMENow	Same as HUD	Same as HUD	Existing Home \$272,650 New Home \$329,446

Source: nmhousing.org

FIRSTHome is a first mortgage loan program for first-time homebuyers who have low and moderate incomes. A first-time homebuyer is someone who has not owned and occupied a home as their primary residence in the past three years. The program works with FHA, VA, USDA and HFA Preferred Conventional mortgage loans through MFA approved participating lenders.

FIRSDown is a fixed-rate second mortgage loan program that provides up to \$8,000 to assist with down payment and closing cost assistance for first-time homebuyers.

NEXTHome is available to first-time and non-first-time homebuyers who are purchasing their next home. NEXTHome's first mortgage loan works with FHA, VA, USDA and HFA Preferred Conventional mortgage loans. The down payment assistance second mortgage loan is 3 percent of the first mortgage loan amount. It may be used to finance down payment and closing costs, including pre-paid items. Borrowers must contribute \$500 of their own funds, and the second loan may be forgiven under certain conditions.

HOMENow is a second mortgage loan that provides down payment and closing cost assistance for first-time homebuyers with lower incomes. This program provides the lesser of 8 percent of the sales price of the home or \$8,000 to help cover down payment and closing costs. Borrowers must earn 80 percent or lower of the area

median income, must contribute \$500 of their own funds, and may qualify for loan forgiveness after living in the home for ten years.

B. Local Economy

1. Economic Impact of Los Alamos National Laboratory

The economy of Los Alamos County, as well as much of northern New Mexico, is driven by activity at Los Alamos National Laboratory (LANL). LANL directly employs 14,754 persons, with a total payroll of \$1.46 billion. LANL purchases \$332.8 million in goods and services and \$45.2 million in construction from New Mexico businesses. Other expenditures supported by LANL, including expenditures of its employees and vendors, indirectly create 9,415 jobs with a combined payroll of \$353.6 million, Indirect spending generates \$1.21 billion in receipts for New Mexico businesses.

Thus, including both direct and indirect and induced activities, LANL is responsible for the creation of 24,169 jobs, \$1.82 billion in labor income, and total revenues of \$3.12 billion to businesses in the state. For context, jobs directly and indirectly supported by LANL are nearly equal to the total employment in the state's manufacturing sector (26,398); wages & salaries exceed those of the manufacturing industry by nearly \$400 million¹.

2. County Employment and Wages by Industry Classification

Jobs in Los Alamos County and the annual average weekly wages for each industry classification are shown below. Data for industry classifications with few employers is not reported by classification but is included in the County total. Los Alamos County's annual average weekly wage is by far the highest in the state, almost double the state average. This is substantially due to the prevalence of professional and technical jobs in Los Alamos County, which is the industry classification with the highest wages in the state.

However, wages are not equally high across industry classifications in the County. In 2018, the highest wages in the state by industry class were Professional and Technical Services, a category that is not reported for Los Alamos County. Wages for lower paid industries are comparable to the state average, and in several industries average weekly wages are lower than the state average. This wage differential puts people who are employed in lower wage jobs at a disadvantage when competing for housing in the County.

¹ University of New Mexico, Bureau of Business and Economic Research, The Economic Impact of Los Alamos National Laboratory, June 2019.

Table 10. Jobs and Wages by Industry Classification

Industry Classification	Los Alamos County, 2018		New Mexico, 2018
	Average Annual Jobs	Annual Average Weekly Wages	Annual Average Weekly Wages
Accommodation and Food Services	459	\$375	\$366
Administrative and Waste Services	547	\$1,362	\$703
Arts, Entertainment, and Recreation	74	\$246	\$514
Construction	187	\$1,165	\$941
Educational Services	70	\$426	\$834
Finance & Insurance	192	\$1,297	\$1,217
Health Care and Social Assistance	860	\$964	\$857
Information	56	\$842	\$998
Management of Companies and Enterprises	*	*	\$1,315
Manufacturing	103	\$815	\$1,022
Other Services, Except Public Administration	296	\$391	\$664
Professional and Technical Services	*	*	\$1,551
Public Administration	1,753	\$976	\$1,123
Real Estate and Rental and Leasing	87	\$644	\$774
Retail Trade	489	\$612	\$566
Transportation & Warehousing	*	*	\$996
Utilities	0	*	\$1,358
Wholesale Trade	28	\$1,141	\$1,064
Total All Industries	16,349	\$1,633	\$868

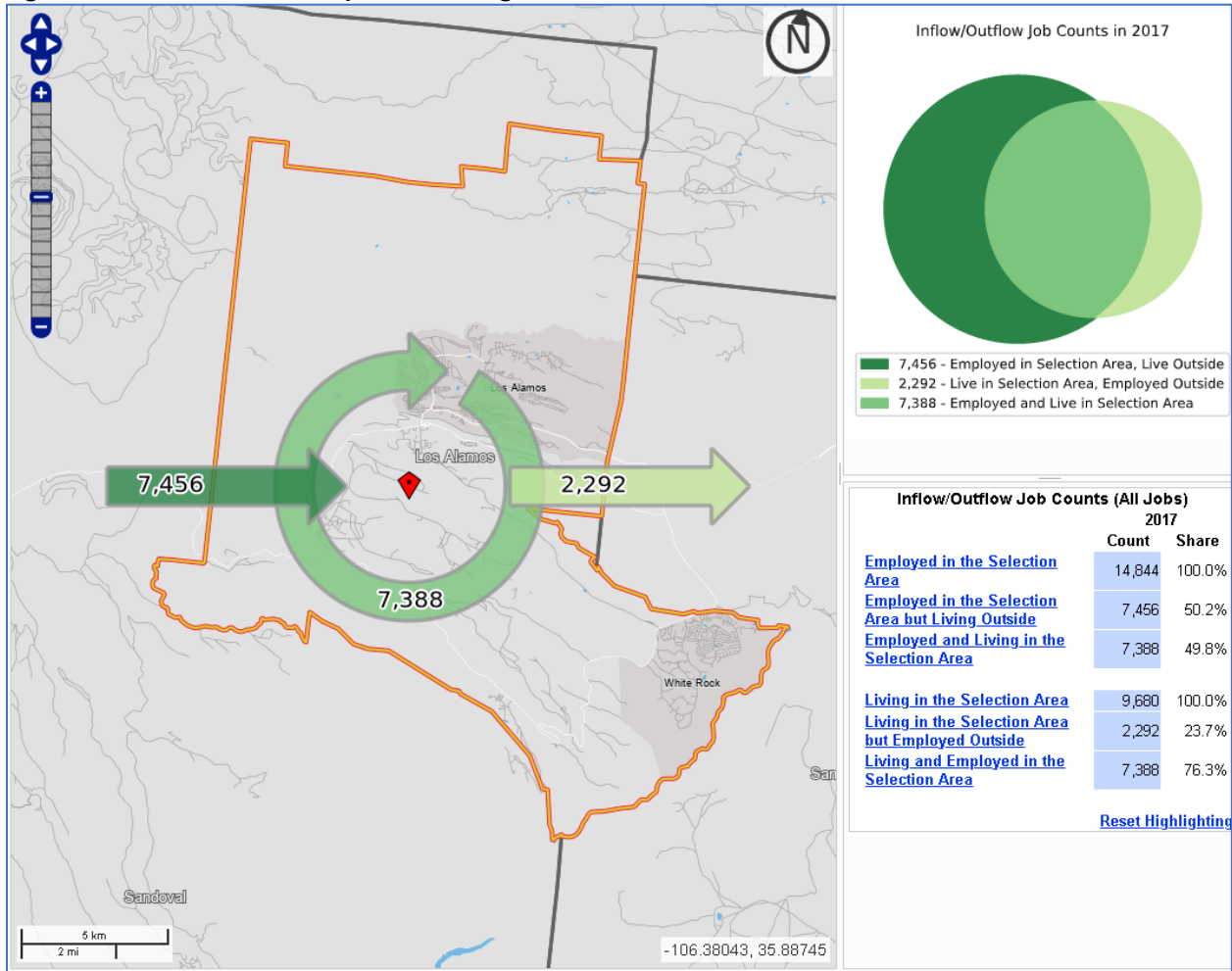
* The sum of industries may not add to total due to Non-Disclosure

Source: NM Department of Workforce Solutions, Quarterly Census of Employment and Wages Annual Report 2018

C. Commuting Patterns

There are two sources of commuting data. The Census American Community Survey data and the Census OnTheMap data. The totals are slightly different, with the ACS data reporting higher numbers. OnTheMap data are more current but do not include some Federal employees. Data from both sources are shown below. The Census OnTheMap application estimates that a little over half of jobs in Los Alamos County are filled by people who commute in from outside of the County. An estimated 2,300 people who live in the County are employed outside of the County. These may include “trailing spouses” of the local workforce who have jobs outside of the County. Half of the people with jobs in the County live and work there.

Figure 1. Los Alamos County Commuting Pattern



Source: US Census, OnTheMap

Table 11. Residence Locations of County Workforce, Journey to Work Data

	2010	2013	2015
Commute from Santa Fe County	3,903	3,787	3,703
Commute from Rio Arriba County	3,286	2,710	2,605
Commute from Sandoval County	626	659	686
Commute from Bernalillo County	496	555	477
Commute from Taos County	131	202	124
Commute from all other locations	630	559	533
Total Workforce Commuting from Outside Los Alamos County	9,072	8,472	8,128
Live and Work in Los Alamos County	8,197	8,121	8,278
Total Workers	17,269	16,593	16,406

Source: US Census, Population Division, Journey-to-Work

Table 12. Residence Locations of County Workforce, OnTheMap Data

	2010	2013	2015	2017
Commute from Santa Fe County	3,134	3,019	3,119	3,181
Commute from Rio Arriba County	2,655	1,736	1,273	1,237
Commute from Sandoval County	734	703	759	805
Commute from Bernalillo County	875	714	904	1,012
Commute from Taos County	312	1,068	142	131
Commute from all other locations	538	1,022	843	1,090
Total Workforce Commuting from Outside Los Alamos County	7,699	8,262	7,040	7,456
Live and Work in Los Alamos County	6,979	6,336	7,276	7,388
Total Workers	15,232	14,598	14,277	14,844

Source: US Census, OnTheMap

Previous studies examined the number of people who work in Los Alamos and number of those who live elsewhere and commute in. Commuters travel from Santa Fe, Española, Rio Rancho, and other areas to work. The majority of commuters live in Santa Fe and Rio Arriba Counties. Commuting time from nearby counties vary depending on location within a neighboring County, but Table 13 shows typical travel times from the top commuting locations. These range from less than a half hour from Española to an hour and a half commute from Rio Rancho or Albuquerque.

Table 13. Commuting Time and Distance from Surrounding Areas

Community	Travel Time	Distance
Española	24 min	18 miles
Santa Fe	43 min	34 miles
Rio Rancho	1 hour 30 min	90 miles
Albuquerque	1 hour 38 min	97 miles

Source: Google Maps

Section 3. Housing Market Analysis

The housing market analysis describes the characteristics of the County's housing supply and current market conditions, including housing available for sale and for rent. Recent market trends include trends in sales price and rental rates.

A. Los Alamos County Housing Supply

1. Housing Characteristics

Table 14 shows the age of housing by year structure was built. Almost 45 percent of the housing in the County, or 3,755 units, was built prior to 1970. Homes built before 1970 are 50 years old and prime candidates for rehabilitation. Since 2016, the County has issued permits for 70 new homes.

Table 14. Year Structure Built

Year Built	Number of Units	Percent of Total
Built 2017 or later	70	0.8%
Built 2014 to 2016	0	0.0%
Built 2010 to 2013	43	0.5%
Built 2000 to 2009	1,006	11.9%
Built 1990 to 1999	734	8.7%
Built 1980 to 1989	941	11.1%
Built 1970 to 1979	1,891	22.4%
Built 1960 to 1969	1,631	19.3%
Built 1950 to 1959	1,389	16.5%
Built 1940 to 1949	711	8.4%
Built 1939 or earlier	24	0.3%
Census Total	8,370	--
Total with County permits 2017 and later	8,440	100.0%

Source: Census, American Community Survey, 5-year estimates, 2013-2017; Los Alamos County

Table 15. Housing Type

Housing Type	Number of Units	Percent of Total
1-unit, detached	5,347	63.90%
1-unit, attached	821	9.80%
2 units	406	4.90%
3 or 4 units	407	4.90%
5 to 9 units	377	4.50%
10 to 19 units	412	4.90%
20 or more units	354	4.20%
Mobile home	246	2.90%
Total Units	8,370	

Source: Census, American Community Survey, 5-year estimates, 2013-2017

Table 16. Number of Bedrooms

Number of Bedrooms	Number and Percent of Total	
Total housing units	8,370	
No bedroom	109	1.30%
1 bedroom	578	6.90%
2 bedrooms	1,783	21.30%
3 bedrooms	3,595	43.00%

Number of Bedrooms	Number and Percent of Total	
4 bedrooms	1,839	22.00%
5 or more bedrooms	466	5.60%
Average household size of Owner-occupied unit	2.48	
Average household size of Renter-occupied unit	2.12	

Source: Census, American Community Survey, 5-year estimates, 2013-2017

2. Occupancy Characteristics

According to the American Community estimates, nearly three-fourths of housing in Los Alamos County is owner occupied.

The American Community Survey estimates that ten percent of housing in Los Alamos County is vacant. Most of these units are not available for rent or for sale. Census vacancy estimates include housing that is rented or sold but not occupied, housing that is intended for occasional use, and housing that is vacant for another reason, such as held in an estate, being renovated or similar situations.

Table 17. Occupancy Characteristics

	2017 (est.)	Percent of Total	2010	2000
Total housing units	8,370		8,354	7,937
Occupied housing units	7,525	89.9%	7,663	7,497
Owner-occupied	5,543	73.7%	5,828	5,894
Renter-occupied	1,982	26.3%	1,835	1,603
Vacant housing units	845	10.1%	691	440
For rent	197	23.3%	198	204
Rented, not occupied	56	6.6%	8	7
For sale only	68	8.0%	74	63
Sold, not occupied	0	0.0%	14	14
For seasonal, recreational, or occasional use	291	34.4%	257	71
Other vacant	233	27.6%	139	66
Homeowner vacancy rate	1.2%		1.3%	1.1%
Rental vacancy rate	8.8%		9.7%	11.3%

Source: US Census, American Community Survey 5-year estimates 2013-2017

The Census vacancy estimate can be flawed because of the difficulty in determining the reason that a unit is vacant at the time of the Census. The estimates of housing that is vacant for sale or for rent from the Census are not consistent with either the original data collected for this analysis or the experience of local residents, local businesses and employees as expressed in the focus groups and surveys. Local data show that there are very few homes for sale or rent.

The Census estimates that more than 500 homes in the County are vacant for seasonal or occasional use or for other reasons. Other reasons include foreclosures; personal reasons; legal issues; preparing to rent or sell; needing repairs or being renovated, extended absence for work, military service or other temporary absence; abandoned or unknown reason. Homes that are vacant but not rented, sold or available for sale or

for rent could be monitored for the reason that they are vacant to determine if there are actions the County could take to encourage year-round occupancy for some of these units.

Owner occupied housing is primarily single family detached, although more than twenty percent of owner-occupied housing is in multi-unit buildings. Renter-occupied housing more evenly distributed among housing types.

Table 18. Tenure by Type of Housing

Tenure and Housing Type	Estimate	Percent of Total
Owner-occupied housing units:	5,543	
1, detached	4,360	78.7%
1, attached	550	9.9%
2	140	2.5%
3 or 4	121	2.2%
5 to 9	121	2.2%
10 to 19	32	0.6%
20 to 49	0	0.0%
50 or more	48	0.9%
Mobile home	171	3.1%
Renter-occupied housing units:	1,982	
1, detached	479	24.2%
1, attached	248	12.5%
2	218	11.0%
3 or 4	248	12.5%
5 to 9	181	9.1%
10 to 19	316	15.9%
20 to 49	124	6.3%
50 or more	93	4.7%
Mobile home	75	3.8%

Source: US Census, American Community Survey 5-year estimates 2013-2017

3. Housing Problems

Housing problems documented in the Census include a lack of complete plumbing facilities, a lack of complete kitchen facilities, and overcrowding, which is defined as more than one person per room. Very little of Los Alamos County's housing has these problems.

Table 19. Indicators of Housing Problems

Occupied housing units	7,525	
Lacking complete plumbing facilities	0	0.00%
Lacking complete kitchen facilities	45	0.60%
Occupants per room		
1.00 or less	7,456	99.10%
1.01 to 1.50	69	0.90%
1.51 or more	0	0.00%

Source: US Census, American Community Survey, 5-year estimates, 2013-2017

B. Indicators of Maintenance and Rehabilitation Needs

The 2010 Affordable Housing Plan identified all housing built since 1960 as potentially needing rehabilitation. Ten years later, housing built prior to 1970 is now fifty years old.

Forty-five percent of the owner-occupied housing in Los Alamos County and 42 percent of renter-occupied housing was built prior to 1970. The age of housing and the quality of older housing were mentioned in focus groups and the community survey as a source of dissatisfaction with housing choices, even though some older housing has been renovated. The Los Alamos County Home Renewal Program assists income-qualified homeowners to make needed repairs that increase comfort, safety and livability without increasing monthly expenses. The Home Renewal Program has assisted 20 homeowners since 2016.

Table 20. Age of Housing by Tenure

	Owner Occupied		Renter Occupied	
	Units	Percentage	Units	Percentage
Total Housing Units: 7,525	5,543		1,982	
Built 2014 or later	0	0.0%	0	0.0%
Built 2010 to 2013	43	0.8%	0	0.0%
Built 2000 to 2009	626	11.3%	317	16.0%
Built 1990 to 1999	388	7.0%	298	15.0%
Built 1980 to 1989	607	11.0%	178	9.0%
Built 1970 to 1979	1,366	24.6%	349	17.6%
Built 1960 to 1969	1,270	22.9%	159	8.0%
Built 1950 to 1959	785	14.2%	484	24.4%
Built 1940 to 1949	445	8.0%	186	9.4%
Built 1939 or earlier	13	0.20%	11	0.60%
Built BEFORE 1970, Potential Need for Rehabilitation	2,513	45.30%	840	42.40%

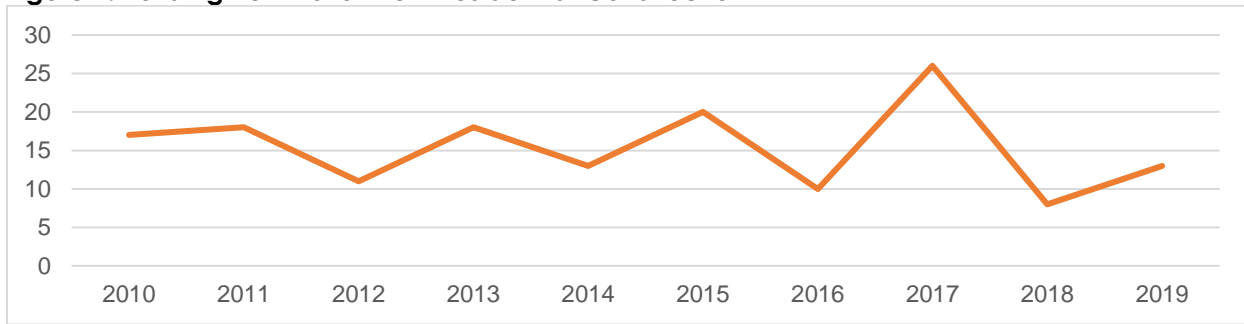
Source: US Census, American Community Survey, 5-year estimates, 2013-2017

C. Current Market Conditions

1. New Construction

A review of building permits for new residential construction shows that very few units have been built in Los Alamos County, although the number of permits has increased in 2017 and 2018. Most new construction has been single family homes.

Figure 2. Building Permits for New Residential Construction



Source: Energov

Table 21. New Residential Construction 2010 to 2018

	2010	2011	2012	2013	2014	2015	2016	2017	2018
Total Permits Issued	2	7	3	4	4	9	4	23	14
Single-Family	2	7	1	4	4	9	4	15	8
Total Multi-Family	0	0	2	0	0	0	0	8	6
2-unit/Duplex	0	0	2	0	0	0	0	0	0
3- and 4-unit Multi-Family	0	0	0	0	0	0	0	8	6
5+ Unit Multi-Family	0	0	0	0	0	0	0	0	0

Source: HUD, State of the Cities Data Systems (SOCDS)

2. Housing for Sale

A total of 21 houses, townhouses and condominiums were listed for sale in the Multiple Listing Service (MLS) in Los Alamos County in September 2019. Of these, ten had a listing price of \$550,000 or more. The average price was \$460,000. There is very little housing available for sale, and housing for sale is not affordable to a family with income from a service or retail job. A listing of individual homes for sale is in Appendix C.

Table 22. Average Housing Prices, Homes for Sale in September 2019

Housing Type	Average Price by Number of Bedrooms				Average Price
	1	2	3	4	
Condo	\$129,000	\$315,000	\$550,000	\$595,000	\$380,800
House		\$220,000	\$455,000	\$649,714	\$549,000
Quad		\$148,500			\$148,500
Townhouse			\$339,667		\$339,667
Average Price by Bedrooms	\$129,000	\$249,625	\$423,625	\$642,875	\$459,976

Source: MLS

3. Housing for Rent

Table 23 lists 32 apartment complexes in the County. These apartment developments were surveyed to determine vacancies, monthly rents and unit sizes by number of bedrooms. Information was obtained from 24 of the complexes. There is a total of 1,358 units, of which 281 (21 percent) are studio apartments, 465 (34 percent) are one-bedroom units, 559 (41 percent) are two-bedroom units, and 53 (4%) are three-bedroom units. The decrease in studio apartments from 34 percent of the total to 21 percent is due to the demolition of 108 units of the Los Alamos Apartments in 2009. The other differences are due to a different mix of apartment complexes in the survey.

Monthly market rental rates range from \$625 to \$950 for studio apartments, which is a 31 percent to 60 percent increase over the reported rents in 2010, compared to a US average of 31 percent increase in rental costs for a primary residence during the same time period. For one-bedroom apartments market rental rates vary from \$640 to \$1,050. This is an increase from the \$585 to \$900 range reported in 2010. Rental rates for two-bedroom apartments range from \$920 to \$1,375, an increase from the \$615 to \$1,075 reported in 2010. Rental rates for three-bedroom apartments range from \$1,100 to \$1,475. The greatest percentage price increases since 2010 have been in the studio two-bedroom and three-bedroom units.

Mountain Vista Apartments and Mesa del Norte Apartments are affordable apartments that provide lower rents for income qualified tenants. Mesa del Norte Apartments were renovated in 2013. Mountain Vista has one- and two-bedroom apartments, and Mesa del Norte has one-, two-, and three-bedroom apartments. Housing developments that were partially financed through Federal housing programs are only available as long-term rentals.

Table 23. Rental Complexes in Los Alamos County

Apartment Name	Total Units	Number of Units				Monthly Rent				Unit Size (Sq Ft)			
		Studio	1BR	2BR	3BR	Studio	1BR	2BR	3BR	Studio	1BR	2BR	3BR
10th Street Apartments	48	46	2	0	0					400	500	--	--
11th Street Apartments	18	11	7	0	0					301	602	--	--
1952 42nd St.													
2010 42nd St.													
3945 Alabama													
Aspen Apartments	124	88	36	0	0	\$625-\$900	\$725-\$975	--	--	350	625	--	--
Caballo Peak Apartments	40	0	0	40	0	--	--	\$1,100	--	--	980	--	--
Canyon Village	120	0	30	90	0	--	\$1,050	\$1,170	--	--	676	971	--
Casa De Luz	48	48	0	0	0	\$795	--	--	--	400	--	--	--
Chapel Apartments	70	0	0	70	0	--	--	\$1100-\$1300	--	--	--	750-900	--
Courtright Apartments	132	0	92	22	18	--	\$640-\$700	\$950-\$1200	\$1100-\$1400	--	550-630		

Apartment Name	Total Units	Number of Units				Monthly Rent				Unit Size (Sq Ft)			
		Studio	1BR	2BR	3BR	Studio	1BR	2BR	3BR	Studio	1BR	2BR	3BR
Gold Street Apartments	100		100								625		
Iris Street Efficiencies	24	24				\$755-850				400			
Kiva Street Apartments	32		32								550		
Las Ventanas Townhomes	9			6	3			\$1,375	\$1,475			1,326	1699-1710
Los Cerros Apartments	104		20	72	12						688	864	1,076
Mesa del Norte Apartments	36		4	24	8		\$588-750	\$690-895	\$775-1,092		640	803	1,058
Mountain Vista Apartments	53		16	37			\$534-593	\$630-722			625	825	
Oppenheimer Place	60		10	50									
Peach St Apts	20			20								850	
Ponderosa Pines	104		20	72	12		\$865-970	\$995-1,120	\$1,175-1,320		550	825	1,000
Ridge Park Luxury Condominiums													
Taylor Properties	8		8								560		
The Cottonwoods at Gold St.	40		40				\$820-920				500		
Thirty 301 Apartments	40			40									
Timber Village													
Tres Casitas Apartments	24		24				\$930-1035				560		
UNM/DOE 9th St. Apartments	64	64								400			
Trinity Village													
Vista del Sol Apartments	24		24								641		
White Rock Apartments	16			16								1000	
Total	1,358	281	465	559	53								

Source: Apartment Web Sites and Apartment Managers

Online sites that advertise rental housing were reviewed in September 2019 to find available apartment units. Craigslist, Zillow.com, Rentcafe.com and Realtor.com were reviewed for rental listings in Los Alamos County. Most of the listings were posted in August and September. There were no listings on Rentcafe.com or Realtor.com. Six listings were found on Craigslist and Zillow, with rents ranging from \$940 to \$2,600 per month. The lowest priced rental was an older manufactured home in Elk Ridge Mobile Home Park. Other available rentals included one apartment in Canyon Village Apartments, a second manufactured home in Elk Ridge, a condominium unit, a casita, and a house. Four of the units have three bedrooms, one has two bedrooms and the casita has one bedroom.

Table 24. Rental Units Advertised in August and September 2019

Location and Name	Bed/Bath	Monthly Rent	Sq./ft.	Type	Date Advertised	Address	Picture/Site
Craigslist							
Los Alamos Elk Ridge	3/2	\$1,980	1,680	Manufactured	Aug. 31	2025 E Jemez Rd.	
Los Alamos Arroyo Lane Condo	3/2	\$1,600	1,100	Condo	Aug. 22	20C Arroyo Ln	
White Rock Vista el Oro Casita	1	\$1,500		Casita	Sept. 12	NA	
Los Alamos Canyon Village Apartments	2/2	\$1,170	971	Apartment	Sept. 16	3200 Canyon R	
Zillow.com							
Los Alamos	3/2	\$2,600	2445	House	Sept. 12	435 Camino Cereza	
Los Alamos	2/2	\$1,600	1134	Condo	Aug. 28	20 Arroyo Ln	
Los Alamos Elk Ridge	3/2	\$940	1280	Manufactured	162 days listed	2025 E Jemez Rd.	

Source: Craigslist; Zillow.com

4. Short-term Housing

Students with internships at LANL require housing for terms of less than a year and primarily during the summer. There are no dormitories or student housing available. Housing available to students includes extra bedrooms or basements in homes as well as apartments found through various apartment search sites. LANL provides a housing resource online that lists housing available and contact information for landlords and property managers.

A Facebook group, "Rentals in Los Alamos & White Rock (NM)", was created in 2015 to help postdocs find housing. The Facebook page facilitates communication between landlords and tenants. An informal monthly poll that provides a snapshot of demand relative to availability provides insight into the rental market for people who are in Los Alamos for a term position at the lab. The site distinguishes between short-term and long-term needs and whether housing is needed/available immediately or later. In August and September of 2019, the site listed the following:

Table 25. Short-Term Rentals Wanted and Available, Summer 2019

Tenant/Landlord/Housing Wanted and Available	August 2019	September 2019
TENANT: wanting a HOUSE/APT/CONDO to rent NOW for long term (6+ mo)	21	30
TENANT: wanting a HOUSE/APT/CONDO to rent LATER for long term (6+ mo)	15	10
LANDLORD: I have HOUSE/APT/CONDO to rent out NOW for long term (6+ mo)	0	3
LANDLORD: I have HOUSE/APT/CONDO to rent out LATER for long term (6+ mo)	0	
TENANT: wanting a ROOM to rent NOW for long term (6+ mo)	2	1
TENANT: wanting a ROOM to rent LATER for long term (6+ mo)	4	1
LANDLORD: I have a room/house/etc. to rent out short term at government GSA per diem rate for Los Alamos County (currently \$94/ night)	2	
LANDLORD: I have a ROOM to rent out NOW	0	4
LANDLORD: I have a ROOM to rent out LATER	0	

The most striking aspects of the poll results are the overwhelming preference for a house, apartment or condo rather than a room in someone else's home and the large number of people seeking rental housing when there are very few rentals available. This indicates that there is significant unmet demand for housing that is separate, complete units rather than a room in a house for both long term rentals of 12- months or more and for shorter time periods, such as a summer or a semester. This need could be met by new apartments or by enabling accessory dwelling units (ADU's) on single family home lots.

5. Current and Proposed/Planned Projects

Housing projects in the development pipeline as of September 2019 include developments on properties that Los Alamos County has released to developers for affordable rental housing and market rate single family and rental housing.

Planned and approved projects include 295 apartment units and 44 townhouses in Los Alamos Townsite and 161 single family homes and 50 apartments in White Rock. Two of the apartment complexes in Los Alamos Townsite include 70 affordable units intended for income qualified tenants with incomes at 40, 50 and 60 percent of the area median income and an additional 64 affordable units for senior households.

Ninety-three percent of new housing is being built on land owned by the County and sold to a developer. The 44-unit townhouse project is redevelopment of privately-owned property.

Table 26. Housing Projects in the Development Pipeline

Project Name	Location	Developer	Target Income	Number of Units	Unit Types	Price Range	Notes
In the Pipeline							
Projects with Public Assistance							
Canyon Walk Apartments	N. side DP Road	Bethel	40, 50 & 60% AMI	70	1,2,3 BR MF	HUD Fair Market Rate	2018 LIHTC award; Start const by 11/19; occupied by 11/20
The Hill Apartments Tract A-13	East of hospital	LAH Investors	Market rate	12 acres 149 units		TBD Market Rate	
The Bluffs Apartments	S side DP Road	Bethel	40, 50 & 60% AMI	64	1 & 2 BR MF	HUD Fair Market Rate	2019 LIHTC award; 55+; Start const by 8/20; occupied by 8/21
Tract A-19	White Rock	Raylee Homes	Market rate	161 SF 50 MF	3-4 BR	\$400 to \$500 K	Mirador PID; Ph 1-29 lots; 50' lots
Projects on Private Property							
The Residences of North Community	Former Black Hole Site	T-2 Development	Market rate	44	TH	TBD Market Rate	
Other Potential Properties							
Public Property							
Vacant land	DP Rd by the Bluffs			200 +- units	MF		Mixed use zone
LAPS property	East of LAMS	TBD	Affordable owner	30 ac 200 +- units	TH or small lots		County/schools partnership; land swap
Privately owned land							
Platted single family lots	Scattered		Market rate	174 lots	Single family		
Ponderosa Estates	North	Private Entity		36.6 ac unplatted	Site is zoned PD-2		Approved lots plus unplatted vacant land
Vacant Land	San Ildefonso Rd	Private Entity		17 acres; 70 +- units	Site zoned PD-5		2007 approved site plan
Vacant Land	Pueblo Canyon Cliffs	Private Entity		4.3 acres	Site zoned PD-5		Proposed for townhomes
Redevelopment	White Rock, Longview	Private Entity		9 acres	Site is zoned C2		Demolishing old commercial properties
Visiting Nurses Site	2202 Canyon Rd	Private Entity		4.7 ac	Site is zoned R-3-H-40		Privately owned. Zoning allows up to 40 units per acre.

Source: Los Alamos County

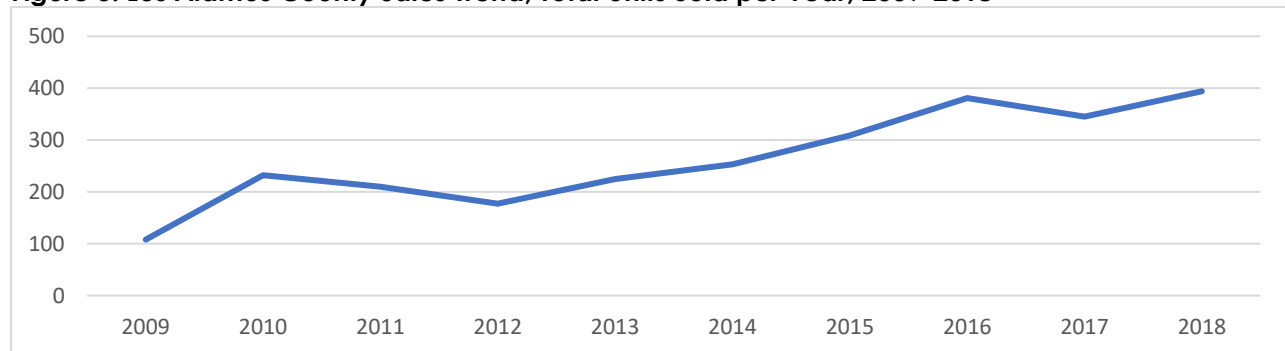
Other potential properties are planned primarily for single family homeownership. Mixed-use sites on DP Road near the two Bethel apartment developments and at the new Smith's Marketplace are intended for higher density housing development.

D. Housing Sales Trends

1. Characteristics of Home Sales

Total home sales in the County have increased steadily for the past ten years, from approximately 100 units sold in 2009 to approximately 400 units in 2018.

Figure 3. Los Alamos County Sales Trend, Total Units Sold per Year, 2009-2018



Source: MLS 8/1/2019

2. Total Housing Sold by Type

Most homes sold are single family homes, followed by townhouses and condominiums. Over 70 percent of home sales for the ten-year period were single family homes, which are 65 percent of the total housing stock. Condominiums and townhouses each account for approximately 11 percent of sales. Other housing types are a much smaller percentage of the total.

Table 27. Housing Sales by Housing Type, 2009-2018

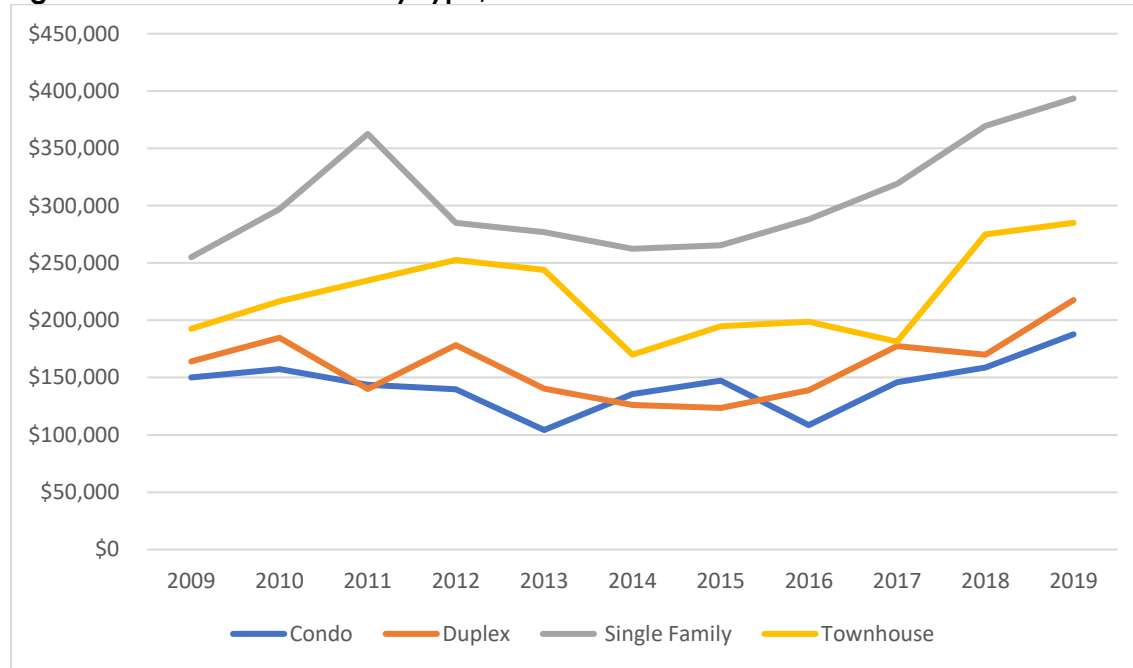
	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Single Family	79	162	159	138	166	191	219	273	238	259
Condo	14	27	17	21	20	31	32	38	40	46
Townhouse	8	25	19	8	16	17	35	45	47	62
Duplex	5	16	13	8	17	7	17	19	15	16
Modular Home	1		1			1			1	
Manufactured Home		2		2	4	2	5	2	3	4
Mobile Home						2	1	2		
X-plex	1		1		2	2		2	1	7
Total Sales										

Source: MLS 8/1/2019

3. Sale Price Trends

Housing prices in Los Alamos County fluctuate with the national economy and the budget and mission of LANL. The trends in prices for the four main housing types are shown below. Over the past ten years, the median single-family home price has increased from \$255,000 to \$393,000. This 54 percent increase in average home price in Los Alamos County is nearly double the 22 percent national increase the national consumer price index for housing during the same time period.

Figure 4. Median Sales Price by Type, 2009-2019



Source: MLS 8/1/2019

Price increases range from a 25 percent increase in the median sales price for condominiums to a 54 percent increase in the median house price for single family homes. The largest percentage increases have been in the price of single-family homes and townhouses.

Table 28. Median Sales Price by Housing Type, 2009-2019

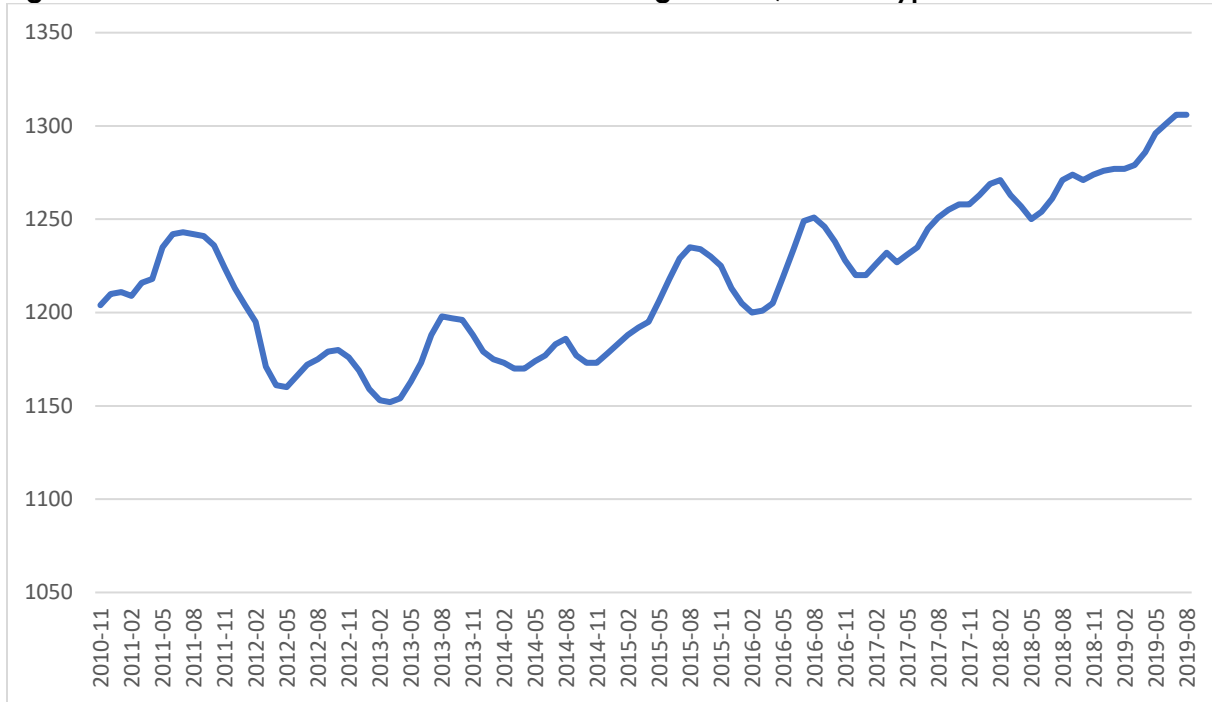
Type	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Condo	\$150,250	\$157,500	\$143,750	\$139,900	\$104,250	\$135,500	\$147,250	\$108,500	\$146,000	\$158,750	\$187,750
Duplex	\$164,000	\$184,750	\$140,000	\$178,360	\$140,250	\$126,000	\$123,500	\$139,000	\$177,550	\$170,000	\$217,683
Single Family	\$255,000	\$297,000	\$362,500	\$285,000	\$277,000	\$262,250	\$265,350	\$288,000	\$319,000	\$369,550	\$393,500
Town house	\$192,500	\$216,500	\$234,688	\$252,500	\$244,000	\$170,000	\$194,900	\$198,750	\$181,500	\$275,000	\$285,000

Source: MLS 8/1/2019

E. Rental Price Trends since 2010

Zillow tracks trends in monthly market rents by County and metro area. The Zillow Rent Index is a measure of the median estimated market rate rent across a given region and housing type. Data for Los Alamos County show a steady increase in rents since 2012.

Figure 5. Market Rent Trends November 2010 to August 2019, All Unit Types



Source: Zillow.com Research Data, Zillow Rent Index

F. Affordable Rental Complexes

There are four rent subsidized apartment complexes in Los Alamos. These include an 8-unit group home for seniors and three larger complexes that offer affordable rents to income qualified tenants. Some of these complexes accept Housing Choice Vouchers. As of the drafting of this document, there were no vacancies in any of these complexes.

Table 29. Affordable Rental Complexes

	2056 Peach Street, Los Alamos
	Los Alamos Group Home
	8 units, 62+
	HUD Senior Housing
	600 San Ildefonso Road, Los Alamos
	Mountain Vista Apartments
	53 units; 30 units have a subsidy
	16-1 bed, \$534-593, 625 sq/ft; 37-2 bed, \$630-722, 825 sq/ft USDA Rural Development, Family Housing
	650 San Ildefonso Road Los Alamos
	Mesa Del Norte Apartments
	36 units LIHTC, Accepts Housing Choice Vouchers
	3301 Canyon Road, Los Alamos
	Thirty 301 Apartments
	9 2-BR units are set aside as affordable LIHTC

G. Potential Development Sites

There is limited land available for new residential development in the County. Los Alamos County is a major landowner. County owned properties were mentioned as potential future locations for housing by local stakeholders and in community survey responses. A public opinion survey conducted during the preparation of the Comprehensive Plan included a question regarding support for using public land for housing. Respondents were split 47 percent responded yes/maybe yes and 47 percent responded no/maybe no. A majority (59 percent) did not favor development of public land for industrial or manufacturing uses. The survey question did not differentiate between public land that is open space and County-owned vacant land.

The 2019 Economic Vitality Strategic Plan sets a goal of increasing the availability of housing in the County, both affordable and market rate. The supporting actions and tactics for this goal include the following recommendations:

2. Identify and assess developable properties

- a. Create a list of vacant, underdeveloped and/or blighted parcels.
 - (1) Identify all County parcels that are available for development and solicit opportunities based upon analysis of assets.
 - (2) Identify all Infill properties owned by LAC, LAPS & LANL, and determine and coordinate re/development opportunities.
 - (3) Identify all vacant and/or blighted parcels privately owned by residents.
- b. Analyze existing County property (vacant and occupied) to determine and recommend highest and best use.
 - (1) Develop and implement an assessment tool informed by criteria to determine "highest and best use," including return on investment and other metrics.
- c. Encourage residential development and redevelopment of vacant, blighted or underdeveloped parcels per the Housing Study.
 - (1) Identify opportunities to incentivize or otherwise encourage new housing development.
 - (2) Discourage long-term land holding of vacant or underutilized property via a vacant property ordinance, urban redevelopment district or other mechanism.

Tract A-19 in White Rock, A-13 in the Los Alamos Townsite, and property on DP Road are the last significant land transfers to Los Alamos County. Developments have been approved and are in process for these properties.

The County is in discussions with Los Alamos Public Schools regarding residential development on property on San Ildefonso Road east of Los Alamos Middle School.

Recognizing that the critical impact on the County of a lack of housing of all types and at all price levels, the reevaluation of public land is recommended to prioritize sites that could be used for housing. A change in status for public lands that are protected by ordinance is required to follow a such a process, and any change will be by

ordinance. The evaluation should be conducted through a regulatory process which considers certain evaluation criteria and community planning principles.

Table 31 shows the capacity of potential sites in the Los Alamos Townsite, including properties owned by public entities and privately-owned vacant parcels that are zoned for residential or mixed use. Estimated densities are based on current zoning and topography. The estimates assume that properties with steep slopes or rocky soils based on a review of aerial photography and topography would not achieve the maximum allowable units as allowed under the applied zoning. Properties that are designated in Ordinance 252 and Ordinance 254, establishing a land preservation status for certain public lands, are included in this list. Because these are some of the largest parcels of land, the County should review the ordinances and prioritize properties that could be used all or in part for housing. Any change that would remove a property from its special land preservation status would require introduction of an ordinance to that effect and a 90-day public review period before a decision is made.

Increasing the density and vitality of the downtown is a goal of the Comprehensive Plan and the Economic Vitality Strategic Plan and supported as a high priority in the Strategic Leadership Plan. A compact, dense downtown has multiple advantages. Concentrated activity supports a vibrant, walkable place and an environment where businesses can thrive. Increasing density is possible on vacant properties, through redevelopment of vacant and deteriorated buildings, and over time, redevelopment of older, single story buildings with surface parking lots. Vacant buildings on sites suitable for mixed-use include the Hilltop Hotel building and the Kroger building.

Table 32 shows the land and development capacity in White Rock, including current projects, vacant land in the town center, vacant residential lots, and a County-owned property zoned for residential use.

In summary, if all land that has the potential for development were to be used, the total capacity is over 5,200 units. However, without County-owned land that is already in use for a public purpose, the total capacity is 2,212 units, including projects that are already being developed. Individual properties are listed in Table 31 and Table 32.

Table 30. Capacity of Potential Development Sites (Units)

	Development in Process	Public Land in Use	Vacant Land	Vacant Buildings	Grand Total
Los Alamos County	283	3,036	391		3,710
Los Alamos Public Schools		292	240		532
Vacant Residential Lots	161		181		342
Unplatted Residential			265		265
Mixed Use	94		155	93	342
Current C2, Potential Rezoning to MU			32	26	58
Grand Total	538	3,328	1,264	119	5,248

Table 31. Potential Development Sites in Los Alamos Townsite

Los Alamos Townsite	Location	Acres	Net Acres*	Net Density	Single Family	TH / Condo	Multi-family	Total Units
<i>In Process or Available</i>								
Black Hole	4015 Arizona Ave.	4.4	4.4	10		44		44
Canyon Walk	120 DP Road	4.4	4.4	16			70	70
The Bluffs	135 DP Road	2.8	2.8	23			64	64
The Hill	Tract A-13, Trinity Dr.	12.0	12.0	12			149	149
Subtotal		23.6	23.6		0.0	44.0	283	327
<i>Short Term</i>								
Ponderosa Estates, Ph 3		20.0	14.0	4	55			55
Pueblo Canyon Cliffs		4.3	4.3	5		20		20
Platted Lots	Scattered sites	55.1	55.1	3	174			174
Subtotal		79.4			229	20	0	249
<i>Medium Term</i>								
North Mesa	North Mesa Middle School Land	30.0	21.0	27		240		240
Ponderosa Estates Future Phases		16.0	11.2	4	48			48
659 San Ildefonso	659 San Ildefonso	17.0	11.9	6		70		70
Visiting Nurses' Site	2202 Canyon Road	4.7	4.7	12		57		57
DP Road MU	Tract A-8-a	21.7	15.2	17			371	371
Vacant MU Downtown	2201 Trinity	4.2	4.2	30			126	126
Vacant MU Downtown	LAC properties	1.0	1.0	20			20	20
Vacant Buildings Downtown	Add addresses	3.1	3.1	30			93	93
Smith's Marketplace Mixed-Use	SW corner Smith's site	1.0	1.0	30			29	29
Subtotal		98.7			48	367	639	1,054
<i>Long Term</i>								
Golf Course	N of Diamond Drive	68.3	47.8	7		340		340
Golf Course	S of Diamond Drive	96.0	67.2	7		480		480
Stables		132.0	92.4	7		660		660
North Mesa Land East of Stables	North Mesa Road	160.9	112.6	4		483		483
Loma Linda Vacant Land	North Mesa Road	9.9	6.9	29		200		200
Airport	101 North Mesa Road	89.1	62.4	14		873		873
DOE Transfer Property								
LAPS Buildings	NM 502	14.6	14.6	20		292		292
Subtotal		570.8	403.9		0	3,328	0	3,328
Total Capacity		772.5	500.8		277	3,759	922	4,957

* For properties that are anticipated to be subdivisions, the net density is derived by subtracting 30% from the raw acreage to account for streets, parks and trails.

Table 32. Potential Development Sites in White Rock

White Rock	Location	Acres	Net Acres*	Net Density	Single Family	TH or Condo	Multi-family	Total Units
In Process or Available								
Mirador		34.4			161		50	211
Subtotal	Tract A-19-1	34.4			161	0	50	211
Short Term								
Platted Lots					7			7
Subtotal	Scattered sites	0.0			7	0	0	7
Medium Term								
Town Center Redevelopment-Vacant Land**		1.6	1.6	20		32		32
Town Center Redevelopment-Vacant Buildings**	Longview Drive	1.3	1.3	20		26		26
Grand Canyon Dr.	Grand Canyon Dr.	12.9	8.8	6		53		53
Grand Canyon Dr.	Grand Canyon Dr.	4.8	3.4	4	15			15
Subtotal		13.8			15	111	0	126
Total Capacity		13.8			183	111	50	344

* For properties that are anticipated to be subdivisions, the net density is derived by subtracting 30% from the raw acreage to account for streets, parks and trails.

** The Town Center properties are currently zoned C-2 but have the potential to be rezoned to MU (Mixed-Use)

Figure 6 illustrated land with potential for future use as housing, including the potential capacity in units. Figure 7 illustrates potential development sites according to the estimated development time frame. A short-term development time frame is within the next five years. Medium term development could take place within five to ten years. Properties with long-term potential would not be developed for ten to fifteen years or longer.

Figure 8 show the locations of properties in Los Alamos County that could be developed or redeveloped as housing. These properties include publicly owned land, vacant privately-owned land and vacant buildings. Properties in the Los Alamos Townsite and White Rock town centers could be developed or redeveloped as higher density mixed-use projects.

Two parcels that were transferred to the County by DOE will require water, wastewater and stormwater infrastructure and have some development constraints related to topography, flood hazard areas and access. These properties could have long-term potential for housing. There are approximately 80 acres in Pueblo Canyon located in Los Alamos County to the northeast of the airport. An additional approximately 200 acres is located in Pueblo Canyon in Santa Fe County northwest of the intersection of NM 502 and NM 4. Because of the potential high utility and infrastructure cost, terrain management issues, flood plain areas and archaeological issues, these properties are long-term prospects for development.

Figure 6. Land with Potential for Residential Development (Acres) and Estimated Capacity (Units)

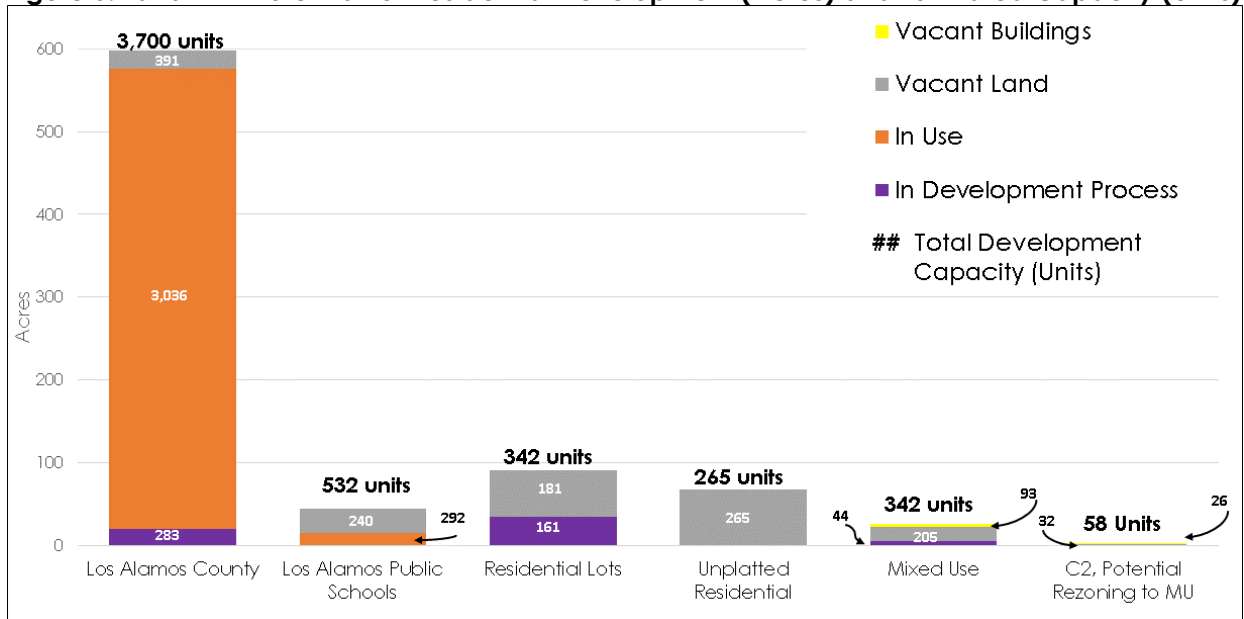


Figure 7. Estimated Development Time Frame for Potential Sites

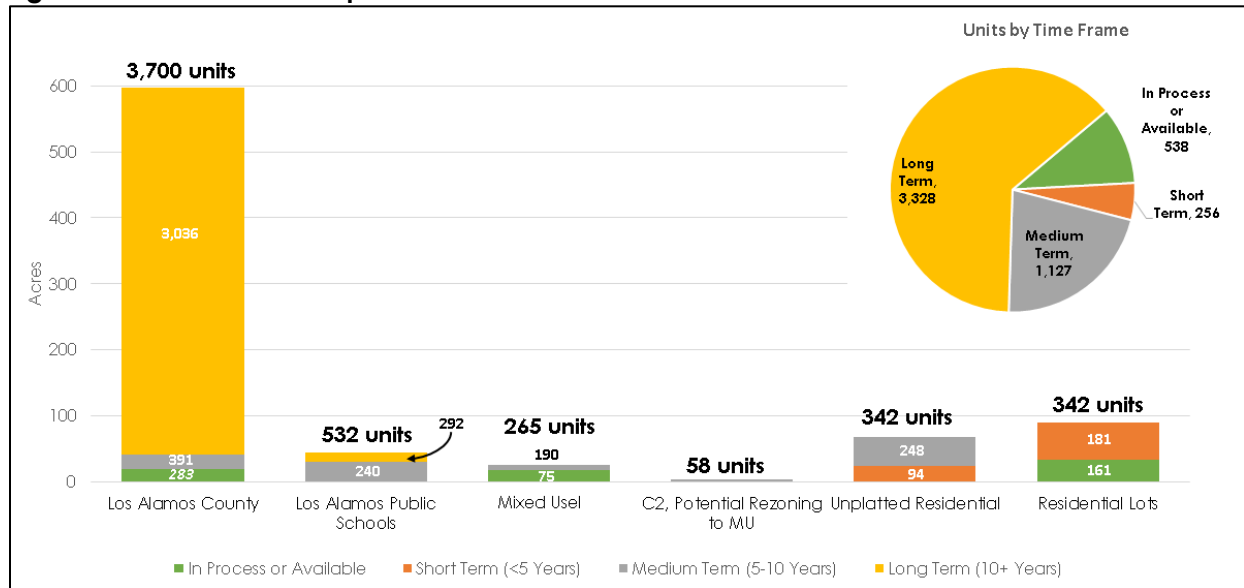
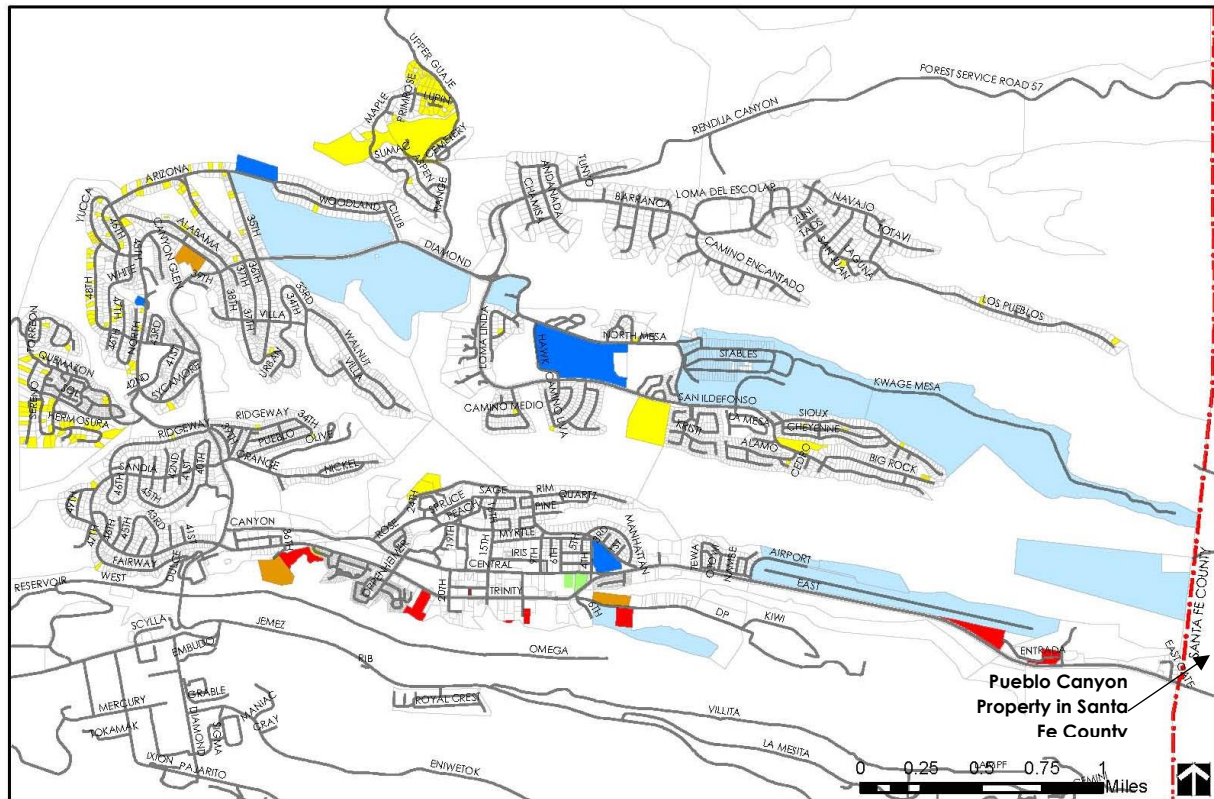
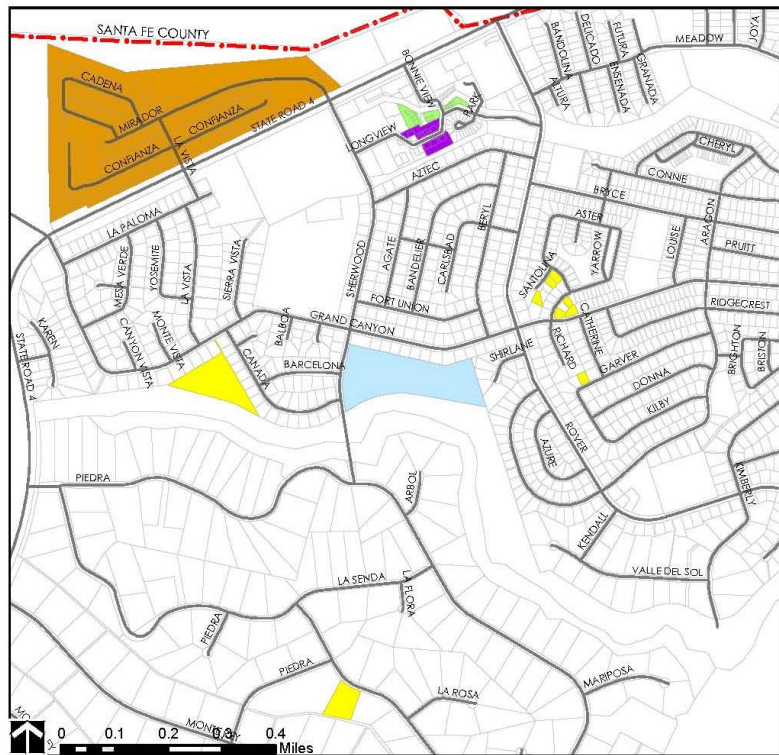


Figure 8. Potential Development and Redevelopment Sites



Land to Consider for Housing

- Site Plan Approved
- Vacant Buildings
- Vacant Residential Zoned Land
- Vacant Mixed Use
- Current C2, Potential Rezoning to MU
- Los Alamos County
- Los Alamos Public Schools



LOS ALAMOS

Source: Los Alamos County

Section 4. Housing Needs Assessment

The housing needs assessment estimates the number of units needed to meet immediate need as well as the number of units needed annually to meet the need for new housing due to growth, commuters who want to move into the County and people who live in the County but want a home that better meets their needs. The estimate takes into account that all people who want to move will not be able to move immediately and that people who relocate within the County will leave a vacancy that can be filled by another family.

Satisfaction with housing in Los Alamos County is clearly an issue for both current residents of the County and people who are employed in the County but live elsewhere. It is possible that people who are dissatisfied with their current housing situation were more likely to respond to the survey than people who are satisfied, although people who would not consider moving also have strong feelings about housing in Los Alamos County.

A comment was made at the Real Estate focus group that there are 3,000 units "missing" from Los Alamos County. That is, the general wisdom is that there is demand for 3,000 units of housing based on current employment levels and the location preferences of the 7,500 people who work in Los Alamos County but commute from outside of the County. The needs assessment independently assessed immediate housing needs and annual need over the next three to five years based on estimates of current residents with a housing cost burden, commuters who would move and anticipated new hires by major employers. The findings of the needs assessment is very close to the conventional wisdom of 3,000 units over five years.

A. Data Sources

The housing needs assessment analyzes the demand for housing in the County. Information used to assess housing needs includes the profile in the previous chapter, current real estate information, real estate trends data, and primary data collected for this study. Primary data sources include:

- Community Housing Preference Survey
- Employer Housing Needs Survey
- Focus group meetings with employers, Realtors and lenders, and LANL staff

When asked if they would consider moving if they could find a suitable residence that meets their needs, 73 percent of respondents to the Community Housing Preference Survey indicated that they would move. This includes 62 percent of owners and 96 percent of renters who responded to the survey.

People who currently live in Albuquerque (94 percent), Española/Española Valley (92 percent), Santa Fe (88 percent) and other locations outside of the County (82 percent) are more likely to consider moving, but a significant number of people who already

live in Los Alamos townsite (74 percent) and White Rock (62 percent) would also consider moving. For local residents, the reasons for considering a move are related to a mismatch between current needs and the size of the current residents, a preference for owning instead of renting, and a desire for a home that is newer or better quality than what they currently own or rent.

Not surprisingly, 100 percent of renters in Albuquerque, Santa Fe, Española and other communities would consider moving. Over 90 percent of owners who currently live in Albuquerque and Española and 74 percent of owners who live in Santa Fe would consider moving. Owners in White Rock, Los Alamos townsite and other communities in northern New Mexico are the least likely to move—although over half of owners would consider moving.

Most people who are currently owners will prefer to buy if they move, and about half of renters and people with other living arrangements would rather buy than continue to rent.

B. Housing Preferences

There are multiple demographic groups with different preferences as expressed by employers, residents and non-resident employees. Each of these groups, and likely individuals within these groups, have different expectations and desires by type of housing, cost and characteristics. A large share of every group expressed dissatisfaction with the housing choices available to them. Generally, housing is older and in need of renovation, very expensive for the quality, and/or mismatched to family needs because people often “take what they can get.” For households that want housing in the County, there are few choices. Parents of adult children, people with roommates and people who are renting a room in someone else’s home are particularly eager for more housing and housing that is affordable to single people and people with lower wage jobs.

The range of housing needs means that increasing the supply of all types of housing would open up the market so that residents have more choices. As people move from their existing home to one that better meets their needs, their current residence becomes available for a new household.

Household types who expressed preferences include:

- Students who are temporary employees for the summer or other short time frame, typically around three months. Shared housing and small units such as studio apartments or casitas are acceptable for graduate students unless they bring families with them.
- Single adults. This group includes single retirees, single students and postdocs, single adult children of Los Alamos County residents and single employment age adults. The desired housing type varies by age, but smaller homes and smaller yards are acceptable. Retirees prefer to own. Depending on age and

lifestyle, a smaller single-family detached home with a smaller yard is preferable to attached single family or multifamily housing. Younger adults would be interested in townhomes, or condominiums and are more likely to be interested in rental housing.

- Young couples. The preferences for this group vary by salary level. The higher paid workers at LANL can afford higher priced homes, but workers at other businesses would prefer an affordable smaller starter home. Rental housing is acceptable, but existing rentals in Los Alamos County are considered to be too expensive for the quality.
- Young families. This group includes postdocs with families, entry level employees at LANL and other employers, and young families returning to Los Alamos County from living elsewhere. Young families who will be in Los Alamos on a short-term basis, one to three years, prefer to rent. New employees who intend to be in Los Alamos County long term would prefer to buy.
- Older working age adults and their families. Adults in the 45 to 64 age group may have older children, no children, or adult children living at home. This group prefers to own a home large enough for their family.
- Retirees or residents who are close to retirement age. This age group may be single or couples and may have adult children living with them. Approximately 36 percent of the respondents who are retired would consider moving. The top reason for moving would be to live in a different community, followed by living in a more rural setting, and living in a smaller home.

C. Housing Need

Housing need for homeownership was estimated using Census data and information from the community and employer surveys. Census data provided estimated of current residents by income level, and the surveys provided information about households that would consider moving if housing that better suits their needs were available in Los Alamos County.

There are two factors to consider in using this data. First, the survey results indicate that surveys were most likely to be completed by residents and non-resident workers who have an interest in housing in Los Alamos County, because they are dissatisfied with their current situation, concerned about growth and land use issues, and/or concerned that housing availability and affordability are affecting them in some way.

Overall need for homeownership and rental housing by income level is summarized in the following tables.

1. Homeownership

Households who are interested in homeownership include a portion of commuters who currently rent elsewhere, renters in Los Alamos County who can afford to buy a home,

current owners who would consider moving, and new hires. Households with annual incomes below \$20,000 are assumed to be renters.

Table 33 shows estimated annual demand for homeownership by people who would move if suitable housing were available and the immediate demand created by new hires by local employers. Demand is categorized by income level, and the maximum housing price based on the maximum monthly mortgage payment is shown in the Table.

Annual demand was estimated based on the housing preferences indicated in the survey. People who would move include renters who would buy, owners who would move to a more suitable home and commuters who would move to be closer to work and schools. People who are already living and/or working in Los Alamos County have barriers to moving, including making the decision to move, saving for a down payment, finishing the lease term in a rental, and selling an existing home, only a portion of people who would consider moving will actually move in a given year.

Recognizing that relocation takes time, the estimates of the rate at which the County would capture commuters, new households, renters, and existing households buying a different home are assumed to be the same as historic rates in 2006 and 2010. The distribution by income is based on the incomes of renters, homeowners, and commuters who responded that they would consider moving in the Community Housing Preference Survey. The analysis below makes the following assumptions about annual demand based on the White Rock plan.

- Annual capture of commuter households who would consider moving and are interested in buying. The assessment assumes that the total annual capture of commuters would be 2.5 percent of commuters. Based on the survey, 55 percent of the commuters who move would prefer to buy.
- Annual capture of local renters. The assessment assumes that 2.5 percent of all local renters would buy a home annually.
- Annual demand from existing owner households buying another home. The assessment assumes that one percent of existing owner households would move to a different home in the County each year.
- Annual demand for homeownership by new hires. Based on the employer survey of projected hiring over the next five years, annual demand is assumed to be 20 percent of the five-year total. Half of new hires would choose to live in the County. Based on the community survey, 36 percent of new hires would choose to buy. The annual demand for new hires is assumed to be an immediate need because most new hires would be relocating to the County.
- Maximum affordable housing price assumes that the maximum monthly mortgage payment, including principal, interest, taxes and insurance, cannot exceed 30 percent the income at the top of the range. The maximum housing price based on the monthly payment was estimated using an online mortgage

calculator, assuming a 30-year mortgage period and a current interest rate of 3.9 percent.

The analysis shows a demand for 576 new housing units, most of which are to accommodate demand by new hires. The annual demand for people who would consider moving is 196 units. Immediate demand for new hires is applicable in the short term, based on reported hiring over the next five years. Demand is spread across income ranges. Lower priced housing is likely to be townhouses or condominiums.

New planned units and existing units for sale will meet a portion of the need, providing 197 units. The unmet need is an estimated 379 units.

Table 33. Annual Demand for Homeownership

Income Range	Annual Demand			Immediate Demand	Total Owner Households	Maximum Housing Price	Maximum Monthly Mortgage Payment
	Renters Who Would Buy	Owners Who Would Move	Commuters Who Would Move	New Hires			
Under \$20,000	0	0	0	0	NA	NA	NA
\$20,000-\$34,999	5	1	2	101	109	\$185,000	\$ 875
\$35,000-\$49,999	6	1	3	102	112	\$265,000	\$,250
\$50,000-\$74,999	7	6	12	75	100	\$396,000	\$1,875
\$75,000-\$99,999	12	11	25	34	82	\$400,000+	\$2,500
\$100,000-\$124,999	4	10	18	23	55	\$400,000+	\$2,500+
\$125,000+	7	31	34	45	117	\$400,000+	\$2,500+
Total	42	60	94	380	576		

Estimate of Unmet Need

Income Range	# Owner Households	Less Planned Market Units for Sale	Less Available Market Units for Sale	Unmet Need
Under \$20,000	NA			NA
\$20,000-\$34,999	109		3	106
\$35,000-\$49,999	112		2	110
\$50,000-\$74,999	100		4	96
\$75,000-\$99,999	82	44	2	36
\$100,000-\$124,999	55	61	4	0
\$125,000+	117	71	6	40
Total	576	176	21	379

Figure 9. Demand for Homeownership

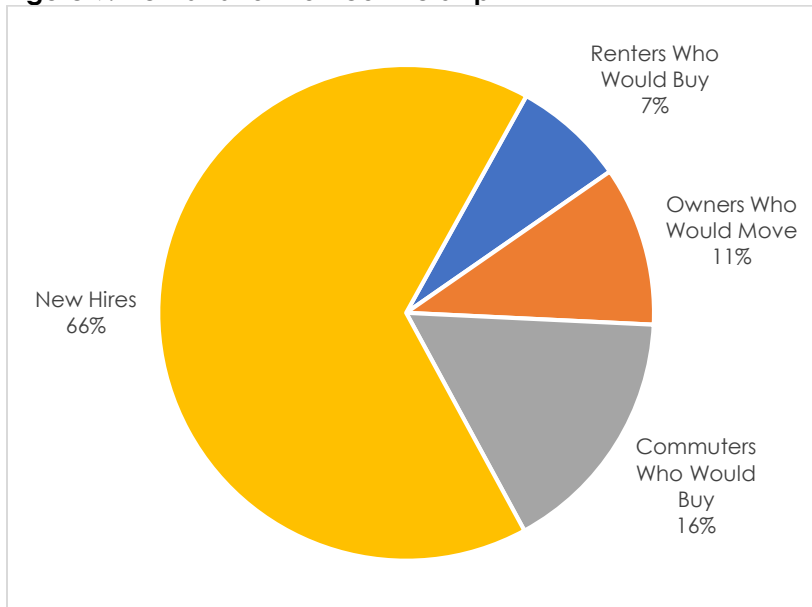
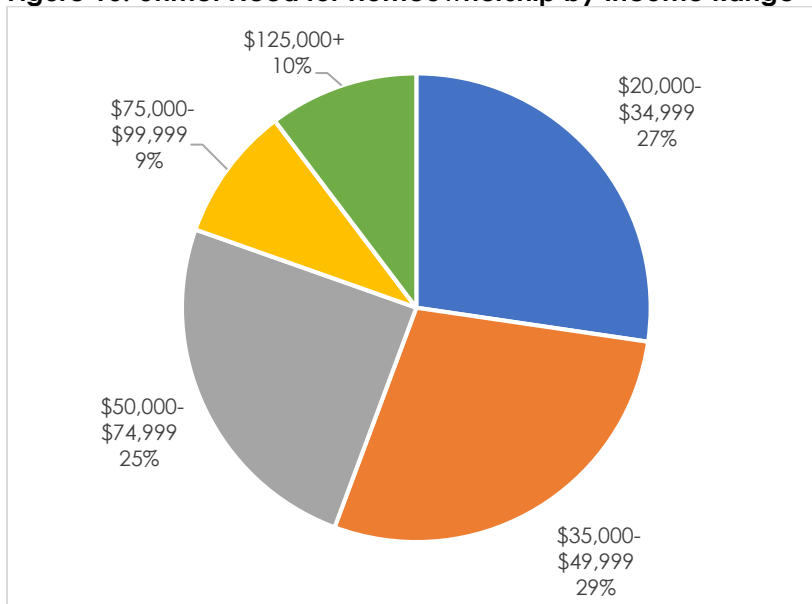


Figure 10. Unmet Need for Homeownership by Income Range



2. Rental Housing

Demand for rental housing includes households that currently rent in Los Alamos County but experience a housing problem. In Los Alamos County, the most common housing problem is a cost burden. Needs include commuters who prefer to rent, long-

term new hires, and short-term hires, typically student interns or visiting scientists, who will need housing for less than six months.

The table below shows the need by income range for both affordable and market rate rentals. Households that fall within the proposed income ranges for new affordable family apartments can earn up to 60 percent of the area median income, or \$72,000 per year for a family of four. Renters in the planned affordable housing for seniors age 55+ can earn up to \$58,000 for a family of two. Units in these apartment complexes will be set aside for households at 40% and 50% of the area median income as well.

The estimated need for rental housing is based on the following assumptions:

- All existing rental households that have a housing problem, including overcrowding, lack of kitchen or plumbing facilities or are experiencing a cost burden are in need of affordable housing.
- A portion of commuters who are renting in their current location would move. All commuters who responded to the survey who are currently renting would consider moving, and of those, 8 percent prefer to rent. In addition, all survey respondents who live in Los Alamos County and are renters would consider moving, and 15 percent prefer to rent. The capture rate for the combined groups is assumed to be 500 rental households.
- The employer survey identified new hires and the anticipated percentage that would need rental housing. The estimated total need by new hires is 660.
- In addition to long term renters, Los Alamos National Laboratory brings approximately 1,600 students to the lab each summer. The students need rentals housing for approximately three months.
- The maximum affordable rent is 30 percent of income, including utilities.
- The total estimated need for long-term rental housing is 1,662 units, which is the total of households with one or more housing problems, commuters who would relocate, renters in the County who would move and prefer to rent, and new hires who need rental housing.
- Planned affordable and market rate units will provide 352 units. The unmet demand is 1,310 units.

The 2016 Comprehensive Plan identified capacity 1,108 dwelling units, which included properties that are now being developed. This housing needs assessment assumes that the capacity could be increased through higher density housing and redevelopment in the town centers, potential use of public land that is now in other uses, and additional land transfers. The housing needs assessment is not constrained by the capacity identified in the Comprehensive Plan. As shown in Table 34, current projects will provide 352 rental units. Immediate unmet demand for long term rental housing is approximately 1,310 units for households with problems (primarily cost burdened rental households), commuters who would move and choose to rent, and new hires who would choose to rent.

Table 34. Estimated Need for Rental Housing

Background Data					
# of Renter Households in Los Alamos County (2017 estimate)					1,983
# of Renter Households with housing conditions					502
# of Renter Households Who Would Relocate					500
# New Hires Reported in the Employer Survey					660
# Short Term Hires Reported in the Employer Survey					1,600
Total Need					
Income Range	Existing Renter Households	Renter Households with Housing Problems	Commuters Who Would Move and Rent by Income Range		
Zero or negative income	95	NA	NA		
Under \$20,000	218	218	0.0%		
\$20,000-\$34,999	199	155	13.9%		
\$35,000-\$49,999	249	115	14.0%		
\$50,000-\$74,999	299	14	9.3%		
\$75,000-\$99,999	480	0	39.5%		
\$100,000-\$124,999	165	0	9.3%		
\$125,000+	278	0	14.0%		
Total	1983	502	100.0%		
Income Range	Renter Households with Housing Problems	Commuters	New Hires	New Hires-LT 6 mo.	Maximum Rent
Under \$20,000	218	0	33		\$500
\$20,000-\$34,999	155	70	99	500	\$ 875
\$35,000-\$49,999	115	70	222	600	\$1,250
\$50,000-\$74,999	14	47	125	500	\$1,875
\$75,000-\$99,999	0	198	62		\$2,500
\$100,000-\$124,999	0	47	79		\$2,500+
\$125,000+	0	70	40		\$2,500+
Total	502	500	660	1,600	
Needs Analysis Estimate for Affordable and Market Rate Long-Term Rental Housing					
Income Range	# Renter Households	Less Planned Affordable Rental Units	Less Planned Market Rate Rental Units	Less Available Market Rate Rental Units	Unmet Need
Under \$20,000	251				251
\$20,000-\$34,999	324				324
\$35,000-\$49,999	407	64		2	341
\$50,000-\$74,999	186	70		4	112
\$75,000-\$99,999	260		211	1	48
\$100,000-\$124,999	126				126
\$125,000+	110				110
Total	1,662	134	211	7	1,310

Figure 11. Rental Housing Demand

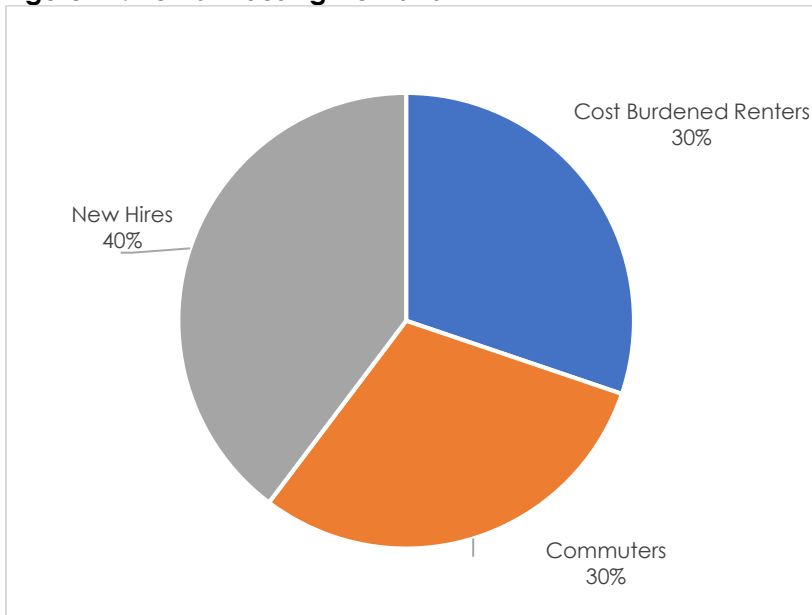
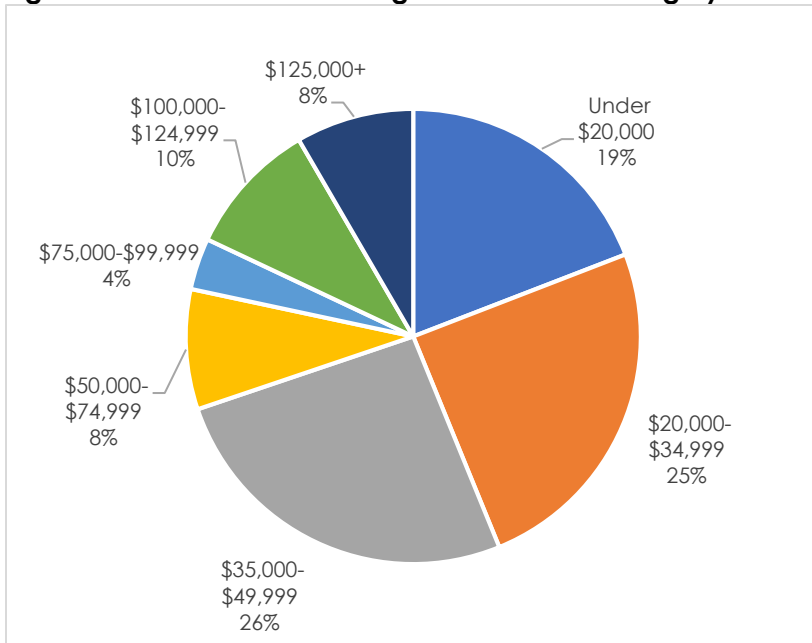


Figure 12. Unmet Need for Long-Term Rental Housing by Income Range



Section 5. Land Use and Policy Recommendations

The primary purpose of the Housing Market Needs Analysis is to provide a current assessment of the Los Alamos County housing market and establish realistic targets and support the County's housing goals for the next five years. The following chapter lists and describes recommendations that the County can undertake to accelerate the pace of housing development and make the best use of available land.

Meeting the need for housing benefits county residents and supports the economic health of the County. Survey results made it clear that housing is a major factor for people considering accepting employment in the County.

The results of the housing market analysis, including data and comments received from the public confirm the housing issues identified in prior plans. From a serious shortage of housing at the time of the Comprehensive Plan adoption to 2019, the lack of housing has become critical as LANL is hiring to fill new positions and replace retirees, efforts to diversify the economy are succeeding and retirees are choosing to remain in the County. The analysis points to a need for not only affordable housing but also assistance for middle income families to afford to buy and rent housing in Los Alamos County.

A. Housing Policy Issues and Recommendations

1. Limited Housing Choice

The housing preferences expressed in the community survey indicate that there is a need for a range of housing types. A continuum of housing types that includes small lots, attached units and higher density apartments will increase choice, make better use of limited land and help make housing more affordable.

a) Increase Residential Density in Downtown Los Alamos Townsite

The inventory of vacant land, and particularly vacant land that is ready for development in the short term, shows that the land supply falls short of what is needed. The two solutions to this dilemma are to increase the amount of land available for housing and to increase density in appropriate locations. Recognizing that it is important to protect existing neighborhoods, the downtown is a logical location for higher density housing.

Respondents to the community survey have different opinions about community character and change. However, the need for higher densities in the downtown, including mixed-use and multi-story apartment buildings, were mentioned by employers and a large percentage of community survey responses. The positive response to higher densities was expressed by both owners and renters who are

current residents of Los Alamos County as well as by commuters and people considering taking a full-time job at LANL.

In addition to housing, people would like to see more shopping and entertainment options, which would be supported by additional residents in the downtown area. The Strategic Leadership Plan notes the important link between population growth and support for the more vibrant community that residents want.

b) Expand Housing Opportunities in White Rock

Residents of White Rock are most supportive of single-family detached housing, but they would also like to see more shopping and entertainment in White Rock. Mirador has a parcel set aside for 50 multifamily units, and there are opportunities for redevelopment within the town center for higher density housing as a scale appropriate to White Rock. An alternate route to work at LANL is seen as very important as White Rock grows to relieve congestion on NM 502 and NM 4.

c) Consider small lots, attached housing products and multifamily housing in infill sites

Single-family detached housing and homeownership are preferred to accommodate families and pets. Some potential buyers would consider smaller lots, but there are also potential buyers who want a larger home and a larger lot.

Attached single-family-townhouses and condominiums provide options for single people, small families seeking starter homes and people who want to downsize.

Students and people who will be in Los Alamos County on a temporary basis prefer to rent, and apartments are an acceptable option. Respondents would like more rental options for families and pets.

A number of multi-generational households responded to the community survey. For most of these households, adult children are living with parents because of a lack of housing options. Housing affordable to young adults and young families would enable adult children to move out. A few families prefer multi-generational living arrangements and large homes that accommodate them.

d) Work with LANL and UNM-LA to determine the feasibility of student housing.

Housing for seasonal or short-term students could help meet UNM student needs during the school year and LANL needs for summer student and other seasonal or short-term workers. Both UNM-LA and LANL have students or summer student interns who need short term housing that is very hard to find in Los Alamos County. Student housing could meet the needs of both. The County can support and advise on planning, infrastructure and utilities for any housing that LANL decides to build for its employees, including a project such as this one.

2. Need for Quality Housing to Meet Demand

a) Public/Private Partnerships

The County has had success in attracting new housing development by partnering with developers. This is a good strategy to attract new development to a relatively remote location that is perceived to be risky because of the County's reliance on a single employer with a single funding stream. The resources that the County can bring to a partnership include favorable terms on the sale of public land, assistance with infrastructure costs, assistance with marketing properties, and an expedited development process. For projects that meet affordability criteria, the County is able to make direct contributions in the form of land, buildings or other donations to support project feasibility. In other parts of New Mexico that are experiencing critical housing shortages, local governments have made direct cash contributions to projects that meet the requirements of their local Affordable Housing Ordinances.

b) Monitor Future Demand Through Communication with Major Employers

The County's housing initiatives support the mission of LANL and other major employers by making it easier to recruit qualified employees. Maintaining communication with major employers and regular hiring updates will allow the County to better serve the needs of these employers. As the largest employer in the County by far, LANL is a key partner with the County in identifying future housing needs.

The County can coordinate with LANL in conjunction with the new research park to determine the potential for housing or mixed-use development on properties in the Los Alamos townsite and White Rock that are no longer needed for LANL and contractor operations.

c) Master Leases by Major Employers

A few employers have master leases on rental properties for their employees. Expansion to other employers is a way to ensure that new hires can meet immediate housing needs and accommodate seasonal and short-term workers. The County could act as a clearinghouse for interested landlords and employers.

d) Marketing Housing Programs and Development Opportunities

The County can support new housing development by coordinating housing programs and disseminating information about programs available through the County Manager's Office, MFA and other providers. The County can assist developers with marketing new housing if needed. In addition, the marketing effort can make potential renters and homebuyers aware of the programs available to assist them, such as the County's homebuyer assistance program, rental assistance, the home renewal program, and USDA and other federal loan programs. Information about County programs is on the Community Development Department website, but annual "housing fairs" or email blasts to County employers are potential proactive marketing strategies.

The County also has a role to play in actively marketing the community, development opportunities, and housing incentives to developers.

3. Limited Supply of Developable Land

The Comprehensive Plan identified developable properties with a capacity for 1,108 dwelling units. The analysis of potential development sites in this analysis showed that if additional land is considered and increased densities are accommodated in town centers and through a continuum of housing types and densities in other areas, over 5,200 units can be accommodated. County-owned land that is currently being used for a public purpose accounts for 3,000 units of capacity, leaving a capacity of 2,200 units if these properties are not considered.

Planned projects will absorb approximately 538 units. In addition to the demand being met by current projects, there is current unmet demand for approximately 1,700 additional units. Over the next five years, there is an estimated demand for an additional 140 units per year. The total current demand for housing and demand over the next five years is 2,938 units. Without using public land or accelerating land transfers, there is a capacity of 2,200 units, leaving a shortfall of about 700-800 units over the next five years.

if County-owned vacant land in Santa Fe County is included in the mix, there is potential for additional housing. This parcel is isolated from existing infrastructure and would require additional infrastructure investment.

Strategies to address the limited supply of land include adding land to the supply through land transfers, making underutilized land more productive and increasing allowable densities on land that is available.

a) Maintain the County Developable Land Inventory

The County is a major landowner, and County properties with favorable physical characteristics and existing infrastructure capacity could potentially be developed. The use of vacant and underutilized County land was mentioned as a solution to the shortage of housing in the County, although there is disagreement about which parcels should be developed. The County's land ownership gives the County the ability to direct projects in a manner that supports the County's vision as documented in the Comprehensive Plan and strategic plans.

The Economic Development Department maintains an inventory of publicly owned properties that could be made available for development. Maintenance of this inventory and periodic review of County needs for land is important to ensure that County resources meet local needs.

The land inventory can be expanded to include privately owned residentially zoned land and vacant and underutilized properties. A related recommendation to designate deteriorating areas and plan for metropolitan redevelopment would identify vacant and underutilized properties in proposed redevelopment areas.

b) Assess and Prioritize County and other Publicly Owned Land for Housing

Given the limited supply of land for new development, the wise use of land owned by the County and the school district is essential to meet County housing and economic development goals. The current housing crisis in the County indicates that housing is a priority for the use of suitable properties. Suitable properties would not include landmarks like Ashley Pond Park or modern buildings like the County Municipal Building. County owned land includes the 80-acre Pueblo Canyon Parcel at NM 502 and NM 4.

The ESVP includes a recommended action to analyze vacant and occupied County-owned properties using an objective assessment tool with metrics to determine their highest and best use. Properties that are suitable for housing should be prioritized for development according to criteria such as:

Tier 1: The highest priority sites should be those that are easiest to acquire and are suitable for development (close to utilities, town centers, transit service) and don't have buildings that are new or in good condition.

Lower Tiers—2, 3, and maybe even 4: These would be sites that could be acquired over a medium to long term if the housing shortage persists. Properties like the airport could be decommissioned over time. The golf course or stables could also be decommissioned over time or planned so that housing is only part of the site, as, for example, reducing the golf course to nine holes or designing a subdivision on open space adjacent to the stables that includes equestrian trails.

If the property is currently being used, the County could consider a plan to decommission the current use over a period of time if a housing shortage still exists. There is also potential for partial development, which leaves a portion of the current use in place.

The assessment can include identifying the potential for higher densities on vacant County owned land in key locations, such as downtown, to diversify the types of housing available and provide for more housing units.

c) Accelerate Federal Land Transfers

Housing prices in Los Alamos County reflect housing scarcity. Housing is a major factor when people consider employment at LANL and other County employers. One of the most important things that the County can do to benefit the County and the mission of the County's largest employer is increase the supply of housing to better align with demand. There is general consensus that additional land transfers from DOE, and possibly other Federal agencies are the best solution to the shortage of land for housing development and that remediation of this property to a condition that is safe and suitable for residential development should be completed.

Land transfers have provided sites for new housing in the past, and a program of continued transfer of federal land that is no longer needed by federal agencies is one way to support new housing development.

d) Encourage Infill Through Zoning Incentives

Recognizing that the County development code has evolved through incremental changes over many years. As a result, Los Alamos County is anticipating rewriting its development code in the near future. Review and analysis of the development code would allow the County to assess how code revisions can help reduce housing costs and enable development of “missing middle” and other desired housing types rather than being a barrier. Accessory dwelling units, higher density development, and expedited approval processes are examples of features that could be encouraged through the code rewrite.

Accessory dwelling units are allowed in the North Community zoning district on single family lots of 6,500 square feet or more. Accessory dwelling units are an infill strategy that can accommodate needs in Los Alamos County, including student housing and multi-generational households. The development code should allow these units in more locations with clear requirements and conditions under which accessory units are allowed.

The current development code provides density bonuses in downtown area overlay districts for mixed use projects that include residential uses and structured parking within the building. Within the town center, building height up to 70 feet is allowed for these projects.

New mixed-use projects that are meeting the intent of County policy have bumped up against building height and parking limits. These include projects adjacent to Los Alamos Canyon and adjacent to R districts with height limits that extend a long distance from the property line. Buffers between uses are appropriate, but the County should review cases where the development code is a barrier to the types of development County policy encourages.

Parking requirements for multifamily development in mixed use and multifamily districts should be reviewed. The zoning code allows for shared parking in mixed use districts. Additional reductions could be allowed on sites adjacent to transit service.

Other incentives that would enable higher densities include smaller lot sizes in more locations and structured parking in town centers to reduce the land area devoted to surface parking.

e) Encourage Residential Development and Redevelopment of Vacant and Underutilized Properties

The County can adopt policies that discourage owners from holding vacant land and buildings and allowing them to deteriorate. Tools that are already available to the County are code enforcement and monitoring tax delinquencies. Other potential

- Implement a clean and Lien ordinance to allow the County to clean up properties and assess the owner for the cost.
- Adopt a Vacant Building Maintenance Ordinance to allow the County to ensure that all vacant buildings meet maintenance standards.
- To encourage development of large vacant properties that are suitable for mixed use or multifamily development, consider tax rates or fees, such as utility standby charges, that cover the cost of serving these properties, and code compliance efforts in alignment with the Council's Strategic Goals as disincentives for leaving property vacant. Such charges would be applied equally to all potential redevelopment sites that are left vacant.
- Research National Home Builders Association publications and other sources for examples of ways to expedite development of vacant residential lots.

The intent is to encourage the owner to put a vacant or underutilized property to productive use. More active encouragement through fee and tax structures could work if development makes economic sense for the owner.

f) Consider Metropolitan Redevelopment Area (MRA) Designation for Deteriorating Areas

Underutilized and vacant properties exist in and near downtown Los Alamos Townsite and in the White Rock town center. Designation of a Metropolitan Redevelopment Area is an option for deteriorating areas and for individual properties. Los Alamos MainStreet is pursuing this designation for the White Rock town center. An MRA designation and plan gives the County the ability to offer financial incentives for private development and redevelopment and join in public/private partnerships.

The designation report required to justify MRA designation will identify vacant, underutilized and deteriorating properties that can be incorporated into the County's inventory of potential sites.

g) Consider Housing Potential in Surrounding Communities

There is an existing pattern of commuting into Los Alamos County from surrounding counties, including transportation support through transit and carpools. Housing choices in nearby communities could help alleviate the County's housing crisis. Establish staff points of contact between Los Alamos County staff and surrounding local governments and information sharing such as regional meetings/workshops and coordination with the Northern Regional Housing Authority (NRHA).

4. Housing Affordability

High development costs in Los Alamos County due to high labor costs, travel distances for crews and materials, and development challenges result in higher housing costs than would be typical elsewhere. Because housing in Los Alamos County is expensive and housing costs are increasing faster than the national average, many middle- and lower-income households that live in the County spend a disproportionate share of

income on housing. Easing this housing burden would allow these households to meet other needs.

a) Increase Participation in the Homebuyer Assistance Program

The Los Alamos County Homebuyer Assistance Program, which is managed by the Los Alamos Housing Partnership through a contract with the County, assists selected qualified households with a down payment and homebuyer education for a home purchase in Los Alamos County. Homebuyers must meet financial criteria set by the County. The maximum income for a family of four is \$96,640, so the program can help middle income families that are priced out of the market in Los Alamos County. The program has assisted 13 buyers since 2017. The use of this program is limited by the number of homes on the market, but as additional homes are built, this program could serve a capacity of about 20 projects per year with existing staff.

Eligible home types include detached, duplex, triplex, quad, townhome, condo or manufactured homes. Manufactured homes must be on a permanent foundation.

b) Explore the Potential for a Community Land Trust (CLT)

A community land trust (CLT) is a development model where land is held in perpetuity by a non-profit, community-based organization on behalf of a community rather than being sold. The CLT enters into a long-term, renewable ground lease instead of a traditional sale. This structure allows homes to be sold at below market rates that are affordable for low- to moderate-income families. Public subsidies through local land donations, grants, federal loan and grant programs and other similar techniques establish initial affordability. The intent is to maintain permanent affordability while enabling a family to own and build equity in a home they could otherwise not afford and realize a modest profit from the increase in property value when they sell. The value of the land is kept by the trust, and there are limits on profits, which maintains affordability for future low to moderate income families. The CLT essentially shares in the home's increase in value and passes that value to the next qualified buyer.

A very successful example of a CLT in New Mexico is the Sawmill Community Land Trust (SCLT) in Albuquerque. The land SCLT has developed property north of Old Town in the Sawmill neighborhood. The development includes a mix of housing types as well as commercial space. Some of the County's land could be developed through a land trust, with the County contributing land at a below market rate to the non-profit organization with expectations for the development and restrictions on how the land is to be used. CLTs can also provide homes on scattered sites and different means of property acquisition to adapt to local market conditions.

When the County considers a community land trust model it will be important to consider the long-term financial sustainability of the trust. The trust can be sustained by developer fees, land leases, resale fees and rents. However, CLTs typically have rely on grants and fundraising to meet operational costs. A sustainable scale is approximately 150 to 200 units with a mix of ownership, rental properties, and mixed income projects.

The scattered site model mentioned above can be more difficult to manage, and an approach that focuses on scattered single-family lots or residential only development would limit future income streams from rentable office/commercial space.

c) Establish a Housing Trust Fund

A Housing Trust Funds would give the County dedicated revenue separate from the general fund to be used to support affordable housing projects and housing programs. There are several potential sources for the fund. Proceeds from sale of land for market rate housing is dedicated to a housing trust fund for the Village of Ruidoso. The City of Albuquerque has a Workforce Housing Trust Fund included in its biannual GO Bond program, which is funded through property tax revenues. Los Alamos County can evaluate financing options that work with the structure of the County budget. The fund could be used to support affordable housing development and programs, through grants, direct cash subsidy to projects that meet the requirements of the County Affordable Housing Ordinance or through contributions to infrastructure required for an eligible project. As a further benefit, the County can place covenants on the properties in advance of sale to require that housing be part of the land use mix when the property is developed. The Housing Trust budget should cover at least 10 percent of the development cost, including land cost, per affordable housing project.

d) Explore the Potential for a Land Bank Strategy

To expand the land available for affordable housing, the County consider establishing a land bank. The land bank could include land purchased at market rate as well as land that is obtained as a result of abandonment, tax delinquencies or unpaid County liens. Land could include larger infill parcels suitable for mixed use or higher density housing as well as individual lots. If the County were able to acquire a number of single-family lots over time, these could be made available to a builder who could build homes on scattered sites.

e) Continue to Support Affordable Housing Projects

Two of the County's pipeline rental projects are maintaining affordability through the use of tax credits supplied through the state Mortgage Finance Authority. Los Alamos County is designated as a Tier 1 county based on its low vacancy rates and needs created by growth. There is demand for additional affordable housing. The locations and income mix of future projects should be carefully considered to avoid concentrating similar projects in the same areas of the County. Mixed-income projects are allowed under the federal tax credit program, and rehabilitation of existing buildings is also eligible for tax credits.

f) Approach the Mortgage Finance Authority (MFA) About Increasing Income Limits for State and Local Programs.

MFA's Los Alamos County's income limits for the FIRSTHome and NEXTHome programs are higher than those currently used for the County Homebuyer Assistance Program. A higher limit would expand opportunities for middle income families.

5. Aging Housing Stock

a) Increase Use of the Home Renewal Program

More than 3,700 housing units in Los Alamos County were built prior to 1970. The age and condition of the County's housing stock was mentioned as an issue for people wanting to buy and rent homes. Within the constraint of the County's budget, consider increasing the funding to this program consistent with staff capacity. The program has assisted 20 homeowners since 2016, This could be increased to about 15 projects per year with existing County and LAHP staff.

The Los Alamos County Home Renewal Program provides financial and technical incentives to low or very low income homeowners that enable them to make emergency repairs that address substandard conditions or make general repairs to bring the home up to current code, improve energy efficiency, enable elderly residents to remain in their homes or to repair or replace exterior stucco or siding. Los Alamos County's Home Renewal Program is managed by the Los Alamos Housing Partnership through an agreement with the County. Selected income-qualified homeowners can apply for funds to help with repairs and home improvements. Eligible homeowners must meet income and asset criteria; the property must be in residential use and be a single family detached, townhome, condominium or manufactured home on a permanent foundation, and the projects must meet the County's criteria for type of repair.

b) Support Home Rehabilitation Programs offered by Other Non-Profits

Habitat for Humanity and other housing rehabilitation programs that serve the County using MFA and other grant funding can help income eligible households maintain their properties and prevent deterioration.

c) Support Small Home Repair Programs for Low Income Households

Programs offered by non-profits such as Mesa to Mesa help income eligible families pay for minor repairs and weatherization improvements, helping to preserve the existing housing stock.

d) Code Compliance Efforts for Property Maintenance and Safety

Ensure that existing housing does not deteriorate below the standard established by the County's building codes and that vacant homes are maintained.

6. Coordinating Housing with Other Planning

The Comprehensive Plan recommends strategic public investments to support downtown development, utility service, parking and transportation and future land acquisition. Coordinating housing with other infrastructure planning will ensure that infrastructure is in place to serve new residential development.

a) Coordinate Infrastructure Planning with Housing Planning

The County provides infrastructure support to new development that advances County goals, including covering the cost of infrastructure to development sites. The

County also waives fees for affordable housing development. Coordinating long term infrastructure planning and infrastructure investment strategy with plans for new housing development is important to ensure that infrastructure is in place to serve planned housing sites

b) Coordinate Land Use and Transportation Planning

There is a concern that higher densities and more housing will exacerbate traffic congestion in the County, particularly during peak hours. The County should identify the impact of land use changes on the transportation system and plan for strategic transportation investments that maintain mobility in the County.

Higher density housing and infill, as well as new housing on future transfer sites, are essential to meet housing demand. In addition to coordinating long-term transportation planning with land use planning, the County can manage traffic congestion by encouraging higher density housing near transit service and commuter bike facilities or encouraging employers to consider staggered work hours to reduce congestion.

c) Coordinate Plans for New Housing with the Los Alamos School District Five-Year Facilities Master Plan

The school district must meet the demand for classroom space created by the school age population in new housing. Projects that are currently in development are factored into the 2019-2023 Facilities Master Plan. The County should coordinate new projects with the school district. In addition, the school district plays a dual role related to housing. As a major landowner, the school district owns properties that may be appropriate for housing, such as land adjacent to North Mesa Middle School that is currently being discussed. Buildings that are obsolete and no longer being used for schools may present a redevelopment opportunity.

B. Implementation Summary Table

The following table summarizes implementation recommendations. These include applicable recommendations from County plans that address the findings of the Housing Market Needs Analysis. Recommendations to implement the plan are organized by the problems identified in the Housing Market Needs Analysis. The recommended actions are organized by issues, with a brief description, related policies, time frame, potential funding source and responsible agency.

Short-term projects are those that can be accomplished within five years. Medium term projects are proposed for a five- to ten-year time frame. Long Term projects are those that would take ten to fifteen years or longer to accomplish.

Table 35. Implementation Summary Table

Recommended Action	Description	Related Policies*	Time Frame	Funding/Resources	Responsible Agency*
1. Limited Housing Choice					
a) Increase residential density in downtown Los Alamos Townsite through infill and redevelopment	Residential development in mixed-use and multifamily projects would increase housing choice and the vitality of the downtown.	Strategic Leadership Plan, Comprehensive Plan, ESVP	Short term	To be accomplished through the development code and marketing	CDD, EDD
b) Expand housing opportunities in White Rock	Residential development on underutilized properties in the White Rock Town Center would increase housing options in White Rock and the vitality of the town center.	Strategic Leadership Plan, Comprehensive Plan, ESVP	Short term	To be accomplished through the development code and marketing	CDD, EDD
c) Consider small lots, attached housing products and multifamily housing in infill sites and as a component of the housing mix in future large transfer tracts	People who responded to the community survey indicated that they are flexible in the types of housing they would rent or buy. Allowing a mix of housing types on infill properties that are close to existing infrastructure, transit, trails, shopping and community facilities would make the highest and best use of these well-served properties.	Strategic Leadership Plan, Comprehensive Plan, ESVP	Medium term	County staff	CDD, EDD
d) Work with LANL and UNM-LA to determine the feasibility of student housing to meet UNM student needs during the school year and LANL needs for summer students	UNM-LA and LANL have students or summer student interns that need short-term housing that is very hard to find in Los Alamos County. Student apartments could meet the needs of both.	NA	Medium term	Joint funding through UNM-LA and LANL; contribution from County similar to other affordable housing assistance	CDD, EDD, LANL, UNM-LA
2. Need for Quality Housing to Meet Demand					
a) Public/private partnerships	Housing is typically provided by the private sector, but the County's Affordable Housing Ordinance and potential MRA designation allow public contributions for affordable housing and redevelopment.	Comprehensive Plan, EVSP	Short term	County staff	CDD
b) Monitor future demand through communication with major employers	Meeting demand for housing supports the mission of LANL and supports economic vitality. Awareness of anticipated hiring and business expansion will help the County better plan for housing demand.	NA	Short term	County staff	CDD, EDD

Recommended Action	Description	Related Policies*	Time Frame	Funding/ Resources	Responsible Agency*
c) Master leases by major employers; County could act as a clearinghouse for interested landlords and employers	A few employers have leases on rental properties for their employees. Expansion to other employers is a way to ensure that new hires can meet immediate housing need.	NA	Medium term	Employer leases	Local landlords and employers
c) Marketing programs for residents and development opportunities	Marketing efforts would inform residents or potential residents who could benefit from housing programs and promote the County's assets and potential assistance to developers.	ESVP	Short term	County staff	CDD, EDD
3. Limited Land Supply and Other Development Challenges					
a) Maintain the County developable land inventory	This important resource for monitoring development capacity and opportunities is in place and can be expanded to include other vacant and underutilized properties.	ESVP	Short term	County staff	CDD, EDD
b) Assess and prioritize County of other publicly owned land for housing and/or strategic disposal	Residential development on suitable County owned sites is one of the County's most promising tools for increasing the housing supply. An objective assessment tool is recommended to help County leaders review and prioritize properties for development, including those listed in Ordinance 252 and Ordinance 254.	Comprehensive Plan, ESVP	Short term	County staff	CDD, EDD, LAPS, LANL
c) Accelerate federal land transfers	Federal land transfers support the mission of LANL and other federal agencies. These properties have historically provided the largest parcels for residential development. Land transfers and remediation continue to be a primary land source.	ESVP	Medium term	County staff	CDD, EDD, LANL Elected Officials and Congressional Delegation
d) Encourage infill through zoning incentives	Potential tactics include zoning ordinance changes to expand districts where accessory dwellings are allowed, modify height restrictions in some areas, and take transit access and project characteristics into account in multi-family and mixed-use districts.	Strategic Leadership Plan, Comprehensive Plan, ESVP	Short term	County staff	CDD

Recommended Action	Description	Related Policies*	Time Frame	Funding/Resources	Responsible Agency*
e) Encourage residential development and redevelopment of vacant and underutilized properties	Potential tactics include active code enforcement, adoption of a vacant property's maintenance ordinance, a vacant buildings ordinance. Focus would be on larger parcels.	Comprehensive Plan, Strategic Leadership Plan, ESVP	Medium term	County staff	CDD
f) Consider MRA designation for deteriorating areas	MRA designation would identify vacant and underutilized properties and provide for public incentives for redevelopment.	Comprehensive Plan, ESVP	Short term	Local government planning fund grant, \$50,000 to \$100,000 depending on scope	CDD
g) Consider housing potential in adjacent communities	Establish staff coordination regarding housing development in the region.	NA	Short term	County staff	CDD, EDD, CA
4. Housing Affordability					
a) Increase participation in the County Homebuyer Assistance Program	This program makes housing more affordable for middle income home buyers. increase participation consistent with staff capacity, 15 projects per year.	NA	Short term	County funds, MFA, County staff	CDD, LAHP, MFA
b) Explore the potential for a Community Land Trust	A community land trust would offer permanent affordability for homeownership and rental properties.	Comprehensive Plan	Medium term	County staff	CDD, EDD, CA
c) Establish a Housing Trust Fund	Funds generated through the sale of properties at market rate could be placed in a trust fund to support affordable housing projects. This would provide a dedicated revenue source for affordable housing separate from the County general fund. Albuquerque has funded a workforce housing trust fund through a revenue bond.	Comprehensive Plan	Long term	County staff	CDD, EDD, CA
d) Consider a Land Bank for Housing	Properties obtained through purchase, abandonment, tax delinquencies and other means could be part of the land bank.	NA	Medium Term	County general fund, trust fund	CDD, EDD, CA
e) Continue to support affordable housing projects using County resources	State and federal tax credit and other housing programs are a resource for public/private affordable housing partnerships.	Comprehensive Plan	Medium term	State and federal programs with County contributions, see 3c Housing Trust Fund	CDD, EDD

Recommended Action	Description	Related Policies*	Time Frame	Funding/ Resources	Responsible Agency*
f) Approach MFA about increasing income limits for the Homebuyer Assistance Program to match the MFA FIRSHome and NEXTHome programs.	MFA income limits are higher than those currently used for County programs.	Comprehensive Plan	Short term	County staff, MFA	CDD, LAHP, MFA
5. Aging Housing Stock					
a) Increase use of the County Home Renewal Program	Funding and marketing this program will help maintain housing quality for income eligible homeowners.	Comprehensive Plan	Short term	County funds, MFA, County staff	CDD, LAHP, MFA
b) Support home rehabilitation programs offered by other non-profits	Home rehabilitation programs can help maintain the existing housing stock.	NA	Short term	MFA, Habitat for Humanity and other non-profits	MFA, individual organizations
c) Support minor home repair programs offered by non-profits	Small home repairs will help maintain the existing housing stock.	NA	Short term	Non-profit service providers	Non-profit service providers
d) Continue code compliance efforts for property maintenance and safety	Code compliance will prevent deterioration of existing homes.	NA	Short term	County staff	CDD
6. Coordinating Housing with Planning for Utility Infrastructure, Transportation, Schools and Other Land Use Planning					
a) Coordinate infrastructure planning with housing planning	Long range planning for housing and infrastructure expansion should be coordinated to ensure that infrastructure is available to target properties.	Comprehensive Plan, Strategic Leadership Plan	Short term	County staff	CDD, PW, EDD
b) Coordinate land use and transportation planning	Congestion is a concern as new housing is built and densities increase in some areas. Coordinating road, transit, bikeway and pedestrian improvements with land use planning can mitigate transportation impacts.	Comprehensive Plan	Short term	County staff	CDD, PW, EDD, NCRTD
c) Coordinate housing planning with LAPS Facility Master Plan	The school district must meet the demand for classroom space created by new housing. The school district is also a significant land holder and partner with the County for housing sites.	LAPS Five-Year Facilities Master Plan	Short term	County and LAPS staff	CDD, EDD, LAPS

* Acronyms:

- EVSP Economic Vitality Strategic Plan
- CDD Los Alamos County Community Development Department
- EDD Los Alamos County Economic Development Department
- PW Los Alamos County Public Works Department
- CA Los Alamos County Attorney
- LANL Los Alamos National Laboratory
- LAPS Los Alamos Public Schools
- LAHP Los Alamos Housing Partnership
- MFA New Mexico Mortgage Finance Authority
- NCRTD North Central Regional Transit District

Section 6. Appendices

- A. Focus Group Meeting Summaries
- B. Community and Employer Housing Survey Results
- C. Homes for Sale in September 2019

A. Focus Group Summaries

All focus groups were held at the Los Alamos County Municipal building on August 20, 2019.

1. Employer Focus Group Meeting Notes

Focus Group Participants:

- ✓ Steve Buelow – New Mexico Consortium
- ✓ Cindy Rooney, UNM-Los Alamos
- ✓ Liddie Martinez, Enterprise Bank
- ✓ Connie Clark, Los Alamos Public Schools
- ✓ Jim McGonnell, Los Alamos Medical Center

Staff and Consultants in Attendance

- ✓ Phyllis Taylor, SSW
- ✓ Michael Wright, SSW
- ✓ Andrew Harnden, LAC

Welcome, Introductions, Review Agenda

Andrew Harnden of Los Alamos County welcomed everyone and announced the purpose of the meeting. Phyllis Taylor introduced the project team. After introductions, Phyllis Taylor briefly described the format of the meeting. Participants provided initial comments about housing in Los Alamos County, followed by responses to focus group questions. Comments are summarized by topic.

Topic 1. Describe your workforce and your understanding of their housing needs. Include the different types of employees you hire and their different needs.

Los Alamos Medical Center job types/positions include:

- Housekeeping
- Administrative staff
- Pharmacists
- Nurses
- Doctors

The housing needs of hospital workers vary by income level and tenure.

- The Medical Center often hires workers that relocate from other places and need housing. These employees often don't purchase homes because they may be short-term. There is a lot of turnover in healthcare, so health workers may be less apt to buy homes.
- The Medical Center has a 4- to 5-year agreement with physicians, who are more likely to buy.
- Nurses, and other specialists, generally commit to 2 to 3 years in Los Alamos

County. They are not looking to purchase but need rentals that are of comfortable and affordable.

- Professional Medical Center employees are seeking a home to purchase in the \$200,000's price range or rentals in the \$800 to \$1,000 price range.
- It is hard to recruit nurses and is getting worse. A nationwide shortage of nurses compounds the challenge of hiring. Nurses have choices of where to locate. When potential new hires cannot find housing in the area, they go elsewhere.
- Nurse hires are primarily female. If nurses are married, it is important that their spouse can find employment.
- The quality of the Los Alamos schools is an attractive asset. Employees with children prefer to live in Los Alamos County because of the schools.
- Most low wage workers live in Española.
- With the hiring at the labs and retirees staying in their homes, it is difficult for new employees to find housing. New housing has been slow to come to the market.

Enterprise Bank job types/positions include:

- Enterprise Bank has seen employee turnover due to lab hiring. Employees are attracted to jobs at LANL.
- The bank employs entry level tellers and others with some banking industry experience. An estimated 100 percent of entry level workers live off hill.
- Many mid-Level employees commute in from Española/Pojoaque Valley.
- Staff in the next tier up, with salaries of around \$75,000, live on the hill and many have spouses at LANL.
- The average wage at Enterprise Bank is \$35,000 to \$38,000. Most employees cannot afford to live in Los Alamos County.
- Executives have not been able to find housing. Most purchase or lease in Santa Fe.
- People replacing old employees can't find a home. \$400,000 homes are not that great. Appraisals come in at 120 to 130 percent of a fair market value. The bulk of sales are cash.

The Enterprise Bank workforce housing needs include:

- Enterprise Bank requires some positions to be on-site. These may prefer to live in Los Alamos County rather than commute. However, entry level employees cannot afford to live in the County.
- Enterprise Bank is restructuring to allow telecommuting. Advances in technology and security, with the aid of the internet, allow some bank employees location flexibility. Telecommuting allows some employees to work from home. Others are able to do their work from another branch. These employees are able to work in Los Alamos a few days a week and don't have to commute on other days.
- Enterprise Bank employees with children prefer the Los Alamos School District.

New Mexico Consortium has job types/positions include:

- The New Mexico Consortium employees full-time, year-round technical support

staff, early and mid-career PhDs, and senior researchers.

- The NM Consortium employees 40-50 students and 12 faculty who are part-time or short-term. These employees generally work in the summers and are elsewhere during the school year.

New Mexico Consortium employee housing needs include:

- Employees with children prefer to live in Los Alamos County because of the quality of the schools.
- New Mexico Consortium employees with spouses may choose to live in another community with more job opportunities, entertainment and activities.
- Younger, single employees are generally not interesting in purchasing. They also tend to prefer Santa Fe because of its nightlife and amenities.
- The New Mexico Consortium contracts apartments that are used for short term hires and also for new full-time hires.
- The Consortium is trying to develop year-round programs that would bring in visiting faculty and students year-round.

UNM Los Alamos (UNM-LA) housing needs include both staff and students. Need to follow-up for information on employee positions.

- There is no student housing at UNM-LA, all students have to find independent housing.
- The housing needs for UNM-LA staff are similar to other employers. However, the UNM LA workforce salaries are lower than LANL salaries, and employees are competing for the same housing.

Los Alamos Public Schools did not have breakdown of staff positions available. It is estimated that the majority of employees live off the hill.

Los Alamos Public Schools employee housing needs include:

- Lower paid positions at LAPS, such as bus drivers, are severely impacted by the housing shortage in the County.
- The reality is there are limited affordable housing options for household that make near the median wage. This puts a strain on employees who are offered a job in a town they can't find housing in. Employers are hiring employees who live in communities off the hill. This can put the position in jeopardy when an employee decides the commute is too difficult or expensive and eventually quits.

Topic 2. How does your workforce breakdown by income level? This information will help the County determine the appropriate housing prices and rents for new housing.

- a. % below \$50,000
- b. % 50,000 to \$75,000
- c. %75,000 to \$100,000
- d. % \$100,000 to \$150,000
- e. % over \$150,000

Los Alamos Medical Center:

- The Medical Center has an average salary of roughly \$60,000.
- Housekeeping employees are generally paid minimum wage.
- Nurses are paid above average, closer to \$35 to \$40 per hour.
- Doctors, pharmacists and director positions are the higher paid positions, with salaries of the \$100,000 and up.

Enterprise Bank:

- Entry level tellers with no experience generally make \$12 to \$13 per hour.
- Employees with some banking industry experience make in the \$18 per hour range.
- Mid-level employees with 3-5 years of experience have salaries in \$35,000 to \$38,000 range.
- Next tier staff with 5-8 years of experience can make up to \$75,000.
- Executives and top-level positions have salaries in the \$200k range.

New Mexico Consortium:

- New Mexico Consortium has three levels and salaries of its employees. Technical support staff generally have salaries in the \$50,000 to \$75,000 range.
- Early and mid-career PHDs are making roughly \$90,000 to \$140,000.
- Senior researcher project leads are making the most, with salaries \$200,000 and up.

UNM Los Alamos:

- Ms. Rooney estimates that entry level staff are making \$30,000 to \$50,000.

Topic 3. What comments do you get from employees in these income ranges about finding housing in Los Alamos County? Are any of them more likely to live in Los Alamos County than others, or is finding housing equally difficult for all income levels?

Los Alamos Medical Center:

- There is not much available housing available, and older housing is not good value.
- The housing is older, cookie cutter, and plain.
- He has heard that the majority of housing was temporary national lab employee housing, quickly constructed, and resold with zero or very limited upgrades.

Enterprise Bank:

- New hires are shocked at the quality and high prices.
- Some have said that buyers and sellers are not using realtors anymore. Most buyers are cash buyers who don't want to pay Realtor fees. The buyers and sellers do the transaction themselves.

- Other comments are that if you want to own, you are going to a price that is higher than the market in surrounding communities. The housing unit will still need rehab and repairs.
- Buyers who are desperate to find housing are willing to sacrifice quality or size if they want to obtain housing in the County. They have to think about what they need vs. what they want.
- New housing will have to go higher and/or smaller to be affordable.
- Enterprise Bank employee are in competition with LANL employees. The feeling is that LANL employees with higher wages have fewer challenges in finding housing they can afford.

New Mexico Consortium:

- New Mexico Consortium tends not to lose employees due to housing constraints in Los Alamos. Many of the New Mexico Consortium employees' salaries are high enough to afford housing. Others are more creative, with many purchasing land and building a home themselves.

Topic 4. How many employees have you hired within the past 12 months?

- The New Mexico Consortium has hired roughly 30 employees in the last 12 months, 50 percent live off the hill. Younger ones self-select to Santa Fe. People have purchased homes and remodelled. Some prefer land in the valley. They have not lost hires, but some people are not happy with the housing.
- Enterprise Banking hired 12 to 14 employees in the last 12 months, 100 percent live off the hill.
- The Medical Center has hired roughly 25 people in the last 12 months, 50 percent of them live off the hill.
- UNM LA hired 8 to 10 employees in the last 12 months who are full time, not short term, Two live on hill.

Topic 5. How many employees do you anticipate hiring over the next five years?

- New Mexico Consortium takes in start-ups. Some have outgrown their space, and they will shed 50 employees to Pebble Labs and UbiQD. Pebble Labs will be hiring 100 to 150 in addition to the 50. They have staff in Santa Fe and will start other start-ups. New Mexico Consortium is selling its Biological Laboratory (BioLab) to Pebble Labs.
- New Mexico Consortium expects to continue to hire about 30 people per year.
- Enrollment is growing at UNM-LA and in the public schools. They will have staffing needs in the future.

Topic 6. We would like to get an idea of where your employees would want to live if housing were equally available in all the markets that serve Los Alamos County.

a. *Do employees prefer to live in Los Alamos County if they can find housing?*

There are four main categories of employees with different housing preferences:

- Families with school age children want to be in the Los Alamos School District and live in close proximity to Los Alamos schools and employment.
- Employees who are younger, single and not interested in purchasing tend prefer Santa Fe for the nightlife, restaurants, and amenities Los Alamos lacks.
- Professionals who are first in and last out of the office or lab and who work 60 hours a week don't want to commute.
- Retirees who are interested in staying and retiring in Los Alamos may prefer a smaller home, but they want to own it. There are waiting lists at Oppenheimer Place and the 2500 Central townhouse subdivision. More retirees are staying in Los Alamos because they have raised families here and the children are staying in the community.

b. *You will be hiring new employees every year, and you have employees who commute because they haven't been able to find housing. Based on past experience, what percentage of employees would choose to live in Los Alamos County if housing were available?*

- A limited number of commuters who have already committed/purchased in another area might choose to move if housing were available, but most would not.
- Employees who are part of a multi-generational family with roots in Northern New Mexico and acreage in Rio Arriba and Santa Fe Counties would likely not move.
- Employees who have been trying to purchase a home in the County would move if they could.
- Maybe half of employees would choose to move if suitable housing were available. Families would be the most likely to move into the County for the schools. Employers see this with younger families as their children become school age.
- Most recruits to the Medical Center would prefer to live in Los Alamos. Mixed-use three to four story buildings are common in Florida where Mr. McGonnell moved from. In New Mexico, people expect a single-family house. Most communities go up, and higher densities to be considered here. High rises appeal to younger people—new graduates and young couples who are most of the Medical Center's new hires.
- Until the level of activity after work hours changes, young people will not choose to live in the County. For people without children, there isn't much interest. For people with pre-school children, childcare is difficult, so there is no interest.
- 75 percent of new Medical Center employees would live in Los Alamos. 90 percent of new hires at UNM LA would prefer Los Alamos. 25 to 30 percent of Enterprise Bank employees would choose to live in the County. Bank employees who would choose to live in the County are mid-level staff with children.
- Triad and N3B high level people couldn't find housing in the County, and it's too late now. They have found housing elsewhere.

Topic 7. How has the availability of housing in Los Alamos County affected your ability to attract and retain employees? What about limited term contractors, short-term or temporary workers, like visiting scientists and students?

- Availability and quality of housing have impacted ability to hire.
- Enterprise Bank had success hiring a person in a \$40,000 per year position. The family moved to Los Alamos in February, and they bought a house in the summer. They had not yet moved into their house in late August because they have to remodel.
- Another person retired, and the bank had two failed attempts to replace them because there was no housing. They finally were able to hire.
- UNM LA hired a PhD faculty position. The person is living in Albuquerque. The person wanted to rent something comfortable, but nothing was available.
- UNM LA has 45 staff positions. 20 percent of these are vacant. They have eight openings.
- It is also difficult to retain employees if they have to commute. The schools see turnover because people don't like to commute.
- Flexible schedules, telecommuting, and business with multiple branches in Espanola and Santa Fe allow employees to work near home and only commute a few days a week. It is easier to fill these positions. However, it is more difficult to fill positions where employees are required on site in Los Alamos every day.
- Back office operations are looking for different locations. Enterprise Bank is moving a call center to Albuquerque or Santa Fe.
- Los Alamos County needs both houses and apartments.
- Most households have combined incomes of \$100,000 to \$150,000.

Topic 8. What is the typical length of stay for a visiting scientist? Contractor? Postdoc? Summer student?

- New Mexico Consortium, contracts apartment housing, for summer students and faculty. These employees are in Los Alamos for the summer and at their respective schools for the rest of the year.

Topic 9. What types of housing are most needed for which LANL employees?

- a. Owner/renter
- b. Single family, townhouse/condo, apartment

New Mexico Consortium – seems to have a 50/50 split of needs, generally determined by age and employees with children, split the need between high density renting and single-family housing units.

Topic 10. What do you see as the top challenges for meeting these housing needs?

- Getting investors/developers. Why is that taking so long? There is concern that Los Alamos County's locations is like being at the end of a cul-de-sac. As long as there are opportunities to build in Albuquerque, builders can keep busy.

Costs and availability of labor are issues for developers. There needs to be a critical mass of developable land. Also, there is a perceived risk of investing. The market crashes with a decline in lab funding.

- It is difficult to build. The unique permitting process is a barrier. Prices escalate with every phase in a subdivision.
- Los Alamos costs 30 percent more per square foot to build. There is a domino effect of delays, cost and scheduling issues. Each developer will have a different set of factors.
- The future of LANL. When LANL is hiring, many residents who already have jobs in Los Alamos County may choose to leave their current positions for a more attractive, higher paying position at LANL. This shifts the burden to business find new employees. These new employees will be competing for housing with higher income LANL employees.

2. Real Estate & Lenders Focus Group Meeting Notes

Focus Group Participants:

- ✓ Jyl De Havens, Retail Solutions
- ✓ Kelly McReynolds, Guardian Mortgage
- ✓ David Horpedahl, Zia Realty Group

Staff and Consultants in Attendance

- ✓ Phyllis Taylor, SSW
- ✓ Michael Wright, SSW
- ✓ Andrew Harnden, LAC

Welcome, Introductions, Review Agenda

Andrew Harnden of Los Alamos County welcomed everyone and described the Housing Needs Analysis project. Phyllis Taylor introduced the project team. After introductions, Phyllis Taylor briefly described the format of the meeting. Then Phyllis Taylor began presentations and began asking questions around the room.

General Comments:

Kelly McReynolds—A tight inventory and high prices make it difficult to find housing. LANL has a great relocation package, which helps lab employees. Lending for multi-unit condominiums is more difficult than for single family homes. This affects the ability to buy and sell the units in multi-family buildings that have been converted to condos.

David Horpedahl is local. He has been a Realtor for 35 years, 12 years in Los Alamos. In the 100 to 150-mile radius of the County there is demand and little housing. He is selling vacant commercial property, which could be developed with housing. He was on the LACDC Board for 12 years. During that time the CDC did housing studies and attempted to attract senior housing.

Jyl DeHaven sees the problem as chicken and egg. If you level housing, where can people go? The cost of land is \$1 million per acre in the central area of the Los Alamos townsite. It is possible to do mixed use on expensive land. The County has done a good job with flexible zoning and incentives.

For investors, restrictions and density limits can limit investment. To attract developers, you need to understand cost. In her opinion, buildings would need to be six stories to be feasible. Recent RFPs have gone to rentals. This is not stable. Townhomes would be better. The DOE property (A-13) went to the highest bidder, who was Gerald Peters, who will be building apartments. The CDC goal is homeownership opportunities.

Topic 1. What type of real estate are you involved in?

- a. Primarily represent home buyers and sellers
- b. Agent for rental property
- c. Provide mortgage loans

- Jyl De Havens, Retail Solutions, primary works with developers for commercial real estate and development.
- Kelly McReynolds, Guardian Mortgage, residential lending in Los Alamos and Santa Fe.
- David Horpedahl, commercial and residential broker.

Topic 2. Describe your experience with residential real estate in Los Alamos County.

- a. Where do most buyers want to live?
- b. Is there a pattern for where buyers want to buy homes? Are there certain buyers who want to be in the County and others who prefer the Española Valley, Santa Fe or another location? Describe what buyer preferences you see as far as location.
- c. What price ranges are buyers/renters looking for? Where do buyers find housing in these price ranges?

Generally, where those employed in Los Alamos choose their home location falls into 5 patterns:

- Commuters want to avoid commuting and want their kids to attend Los Alamos schools. When kids are school age, people care about being in the County near schools more than they care about the type of house. Mr. Horpedahl believes that families would accept townhouses.
- People with higher incomes want single family homes. Single family housing is the driver, but there is not enough land for this to be the only product.
- Post docs are typically in the community for a couple of years but not always.
- People buy condos to have a Los Alamos address for the schools.
- Trailing spouses want activities in the community, so there are a lot of active clubs. There are parks and outdoor activities, but people want more shopping. This is another chicken and egg dilemma. You need more population to support more retail.
- The Smith's site was originally supposed to include housing, but the market crashed, so now it is just a strip center. The pad sites on the Smith's property could be 3 to 4 story housing.
- There are distinct buyer profiles with housing needs that don't overlap. There is a retired population; there are younger families who want to be located in the County for the school district; and there are new hires and postdocs at LANL with no kids.

Topic 3. Describe your perception of the housing that is available in Los Alamos County? Other than location, what aspects of the housing is appealing to buyers? What features are buyers looking for that are hard to find in Los Alamos Townsite or White Rock?

- People live here and find it so appealing because there is no crime, with balanced population, and walkable at late hours. It can be described as a city role model for raising children.
- The housing market now is driven by necessity, not choice. Look at the age demographics. People live in houses that are older and smaller than they want.

Topic 4. Incomes are relatively high in the County, but we are aware that not everyone has a scientist's salary. What challenges do you see for buyers relative to affordability as a Realtor or as a mortgage lender?

- Those lower income don't carry as much purchasing power as those scientist salaries. Thus, most homes in Los Alamos County are out of their budget ranges and need to shop in other areas.
- Understanding the different housing types require more of a down payment, for example condos require 10 percent comparatively to single-family need only 3 percent.
- The housing market is competitive, many residents are selling without a realtor and more and more aren't needing conventional financing and paying with cash.

Topic 5. What about rental housing?

- a. What are renters looking for relative to what is available?
- b. If rental housing is not available in Los Alamos County, where do people who prefer to rent long-term and short-term residents live?

- Rental demand tends to be divided by demographics, with younger, single employees attracted to renting and being closer to more nightlife opportunities in Santa Fe and generally, older married couples with children preferring to own a home in Los Alamos County.
- There are limited affordable rentals in Los Alamos, those with lower incomes cannot afford to live in Los Alamos County and must commute in from Espanola, Santa Fe, Rio Rancho, Albuquerque, and other communities.

Topic 6. Based on the number of your potential buyers in a year who aren't able to find suitable housing in Los Alamos County, what would you say is the annual shortage in housing units?

- Anecdotally, the rumor is about 3,000 housing units are needed to meet demand within Los Alamos County and another 5,000 – 7,000 in Santa Fe.

Topic 7. Do you have other comments or suggestions for increasing the supply of housing of all types and price ranges?

- When land is given to the County, such as tract A-19, the County is slow to make a decision about the use of the property. Rendija Canyon is an example where the decision was to keep the land as open space.
- The 1960's housing has been remodeled so many times. When housing on Trinity Drive and in White Rock was demolished, people were displaced. Prices of the old buildings are high. The Denver Steels were \$100,000 ten years ago, but they are \$300,000 now. It is expensive to scrape old buildings and start over.
- The visiting nurse's site could accommodate 40 townhouses.
- The cyclical need that depends on one employer is perceived as risky for a large scale out of town developer. As a result, locals develop on a small scale. The population has not varied.
- Housing prices in Los Alamos County are lower than other high demand markets like Seattle. The lab purchase program makes housing more affordable and is an advantage for lab employees.
- There is a need for larger townhouses for large families in the mix of housing.
- Focus group participants are seeing more aging in place. There is more for retirees to do, and the County's communities are walkable.
- Ms. McReynolds has searched for three years for a home. People will pay big prices just to get into something.
- The County is the biggest landowner, but residents like the public land as open space. As a result, land that could be used for housing is not used that way. A comment was made that the golf course needs to go.
- When commercial land is developed, the developer needs to build residential to go with it. The housing analysis needs to identify the residential products and prices needed to help developers know what they need to build.
- The price ranges for owning and rentals varies, Los Alamos has one of the highest median incomes in the State, which has affected housing prices.

- Some workers choose to live outside Los Alamos County. However, many workers live outside of the County because of the limited inventory and high prices. Española or Santa Fe can offer more affordable options. New hires at LANL are taking advantage of the housing relocation assistance that returns a portion of the home purchase price back to employee.
- The new management team at LANL has a mission to foster technology transfer, which will change what is happening in Los Alamos County. The participants in this focus group believe that the vitality of the town will change with the emphasis on entrepreneurship.
- Ms. DeHaven thinks that 25,000 people will fill all of the land that is available. She suggested that a lab office in Española can help the City and Los Alamos County become like sister cities. There is developable land around Española, and national developers would be attracted to larger land parcels. Developers will need details on what to build.
- Participants think that empty nesters and retirees would downsize but nothing is available. Mr. Horpedahl's mom knows 50 people who would live in a smaller place that they own. Something the size of the Denver Steels—a small house with a small yard.
- Financing Considerations
 - Conventional housing loans require a three percent minimum down payment. For a condo, the minimum down payment is five to ten percent. Because of the differences in financing, resale of the quads is an issue. Buyers need 10% down, and they make too much money to qualify for down payment assistance.
 - USDA and VA loans are possible in Los Alamos County. These provide 100 percent financing. The maximum loan amount for a USDA loan is \$484,000; maximum income is \$108,000. A buyer can finance a townhome with a USDA loan. It is hard to finance condos and units in mixed-use buildings. The maximum split between residential and commercial in a mixed-use building is a 60 percent residential/40 percent commercial split.
- Barriers to Residential Development
 - Developers are concerned about risk management. They need to be assured that they can sell. They need to know what tools they can use to make development less risky.
 - To minimize developer concerns, Ms. DeHaven recommended that the report confirm the estimated unmet demand of 3,000 units and identify housing need by type, tenure and location. Then identify what commercial is missing to serve this additional population.

Include a discussion of the finance options available to buyers in Los Alamos County.

3. LANL Focus Group Meeting Notes

Focus Group Participants:

Kathy Keith

Staff and Consultants in Attendance:

- ✓ Phyllis Taylor, SSW
- ✓ Michael Wright, SSW
- ✓ Andrew Harnden, LAC
- ✓ Michael Arellano, Chief Building Official
LAC

Welcome, Introductions, Review Agenda

Andrew Harnden of Los Alamos County welcomed everyone and announced the purpose of the meeting. Phyllis Taylor introduced the project team. After introductions, Phyllis Taylor briefly described the project and the focus group questions. This meeting was conducted as a key stakeholder interview.

Topic 1. Describe your workforce and your understanding of their housing needs? Include the different types of employees you hire and their different needs.

- The workforce at LANL consist of full time and part-time/short-term employees. These employees have various needs and demands for housings. Housing is limited and many decided to live elsewhere, "off the hill". This includes Santa Fe, Española, Rio Rancho, Albuquerque and other surrounding communities.
- There are roughly 1,600 undergraduate and Master's degree students, who have internships at the lab, generally in the summer term. A lot of these are from the region, but students come from all over. There are no dormitories. LANL does not provide housing. Community members house students in spare bedrooms, basements, and guest houses. Students are generally single. Check with UNM-LA about their housing priorities.
- There are 400 postdocs who take on grant projects for 2-3 years. Post docs sometimes have families and need family housing. Many international, Post docs are generally are seeking rental housing for the short term. Approximately half stay at the lab for permanent jobs. The rest go back to teach or take another job at startups.
- There are also visiting scientists. Ms. Keith did not have these numbers.

Topic 2. How does your workforce breakdown by salary level? This information will help the County determine the appropriate housing prices and rents for new housing.

- a. % below \$50,000
- b. % 50,000 to \$75,000
- c. %75,000 to \$100,000
- d. % over \$100,000

Ms. Keith did not have this breakdown. information would come from the surveys.

Topic 3. What comments do you get from employees in these income ranges about finding housing in Los Alamos County? Are any of them more likely to live in Los Alamos County than others, or is finding housing equally difficult for all income levels?

- Those employees with children generally prioritize living in Los Alamos County.
- The housing shortage is affecting hiring at all salary ranges.

Topic 4. How many employees have you hired within the past 12 months?

- In 2018 LANL hired 1,000 new employees and plan to hire another 1,000 by the end of 2019. 600+ new hires are anticipated per year over the next five years.
- Attrition is the primary reason for the number of people being hired. Baby boomers are retiring.
- 30% of employees have been at the lab for less than 18 months. The net income is dropping.
- Historically employment was stable with few new hires. People who retired left the hill, but now many who are retiring are choosing to stay rather than move. There are now multigenerational families in Los Alamos County.
- With the new lab management, there is new work. A planning process is ongoing and should be operational by 2023. In addition to attrition there will be another 1,000 to 1,400 LANL employees. In addition, upgrades to facilities will be required, which will need workers. There is potential as the lab hires new contractors to hire for longer terms, around ten-year contracts.
- New hiring has taxed housing and transportation systems. The lab is looking at a new road from White Rock to Santa Fe, but there are right-of-way issues to overcome.
- Housing should be looked at from a regional perspective, including Rio Arriba County. There is a housing working group. Pojoaque has a single-family tract which may have 99-year leases.

Topic 5. How many employees do you anticipate hiring over the next five years?

- Again, now with 1,000 last year and another 1,000 in current year. Anticipation of new work, still in the planning process stage, and would be in operational until 2023. However, the potential additional hiring of 1,000-1,400.
- Some uncertainties with government funding and political agendas.

Topic 6. We would like to get an idea of where your employees would want to live if housing were equally available in all of the markets that serve Los Alamos County.

- a. Do employees prefer to live in Los Alamos County if they can find housing?
- b. You will be hiring new employees every year, and you have employees who commute because they haven't been able to find housing. Based on past

experience, what percentage of employees would choose to live in Los Alamos County if housing were available?

- Generally, LANL employees who are younger and single and less interested in owning find Santa Fe more appealing for its nightlife and activities. Older employees with a significant other or with children and want to own their own home prefer Los Alamos.
- Long-time New Mexicans with multigenerational families nearby may choose to live near family.
- New families with kids in school want the convenience of a location close to work and schools.
- Later career professionals who are working 60-hour weeks want to live close to work.
- The lack of availability and quality of housing are problems. People are happy to find whatever they can find.

Topic 7. How has the availability of housing in Los Alamos County affected your ability to attract and retain employees?

- The lack of housing affects the ability to hire. LANL jobs are highly specialized, and it is hard to recruit highly sought-after specialists. The lab currently has 1,300 vacancies, Jobs are offered, but when a potential candidate cannot find housing, they may decline the offer.

Topic 8. What do you see as the top challenges for meeting these housing needs?

- Land tends to be the greatest challenge. What potential is there for the golf course? A new course at White Rock might be good. The stables could move to Rendija Canyon. The airport has 30 airplanes. Does the airport have to be there? The airport is tied up because of FAA funding, but in a few more decades, this property might be useable.
- This is followed by, the expansion and capacity of utilities and infrastructure.
- Lastly, the environmental cleanup by N3B at all LANL/DOE land transfer sites is critical to the future use of those properties.

Topic 9. Do you have other comments or suggestions for increasing the supply of housing of all types and price ranges?

One major concern is around the retiree housing, and limited amount of suitable housing for 50+. The ideal housing type is one level, no lawn, minimal maintenance, and gives the resident freedom to travel.

B. Community and Employer Survey Results

On behalf of Los Alamos County, Sites Southwest conducted a Community Housing Preference Survey of people who live and work in the County and an Employer Housing Needs Survey of employers in the County. The surveys were distributed and collected in August and September of 2019. Resident and employee surveys were distributed through local employers, a press release and ads in local news media, at the Los Alamos Farmers Market and through the senior centers. Employer surveys were distributed through the CDC mailing list, a list of major employers, and the Los Alamos County business license list. A total of 951 community surveys and 46 employer surveys were completed. The surveys asked a number of questions about current housing conditions, affordability, availability and preferred housing options.

1. Community Housing Preference Survey

1-2. Where do you live?

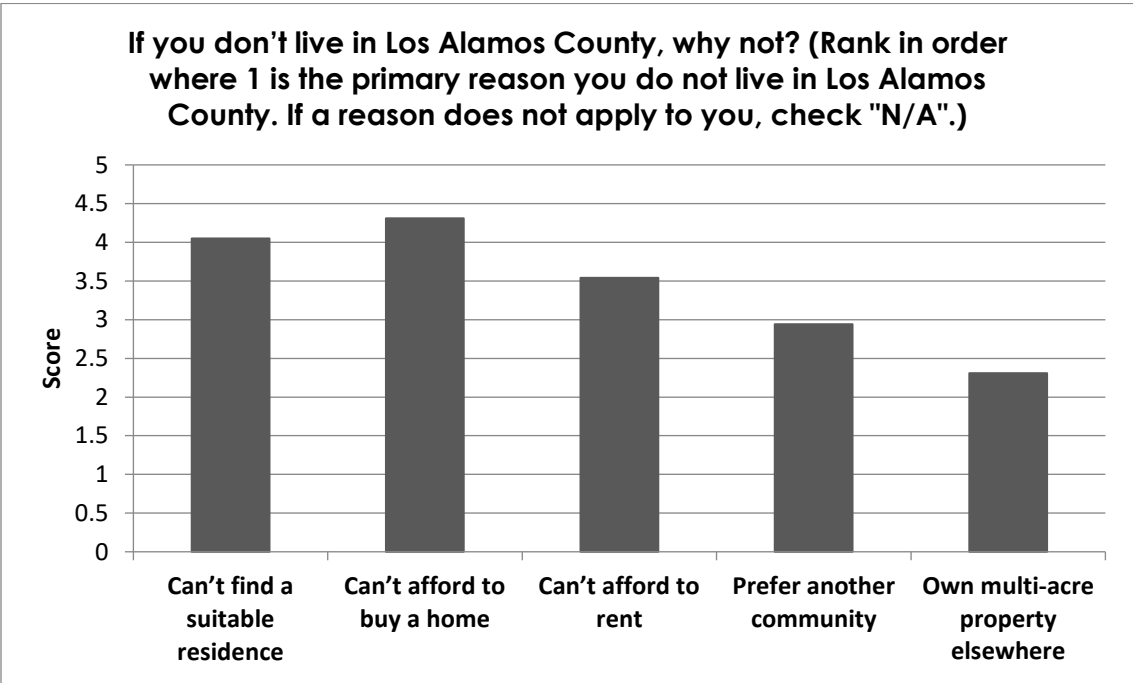
Respondents were asked their home zip code and the name of their home community. Eighty three percent of respondents live in Los Alamos County, with 62 percent in the Los Alamos townsite and 22 percent in White Rock. The next most represented communities are Santa Fe, Española and other Northern New Mexico communities. Responses from people who live in the Albuquerque metro area, other New Mexico cities, and out of state were less than five percent of the total.

3. Are you a long-term or short-term resident?

Ninety percent of respondents are long-term residents of the area. Six percent are in Los Alamos County for one to two years and two percent are short-term contractors, visiting scientists, summer students or similar. The remaining two percent commute from outside of the area or split residency between Los Alamos and another location.

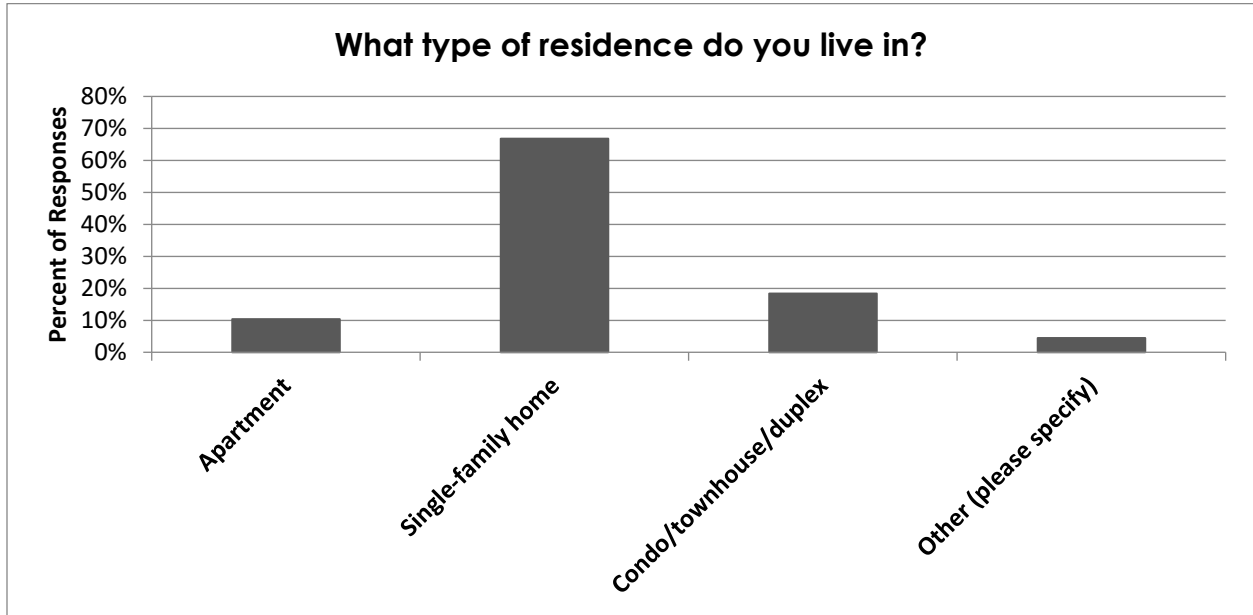
4. If you don't live in Los Alamos County, why not?

Respondents were asked to rank their reasons from 1 to five for not living in the County. Respondents were able to include "N/A" in the ranking for any reason that did not apply to them. the scores ranged from 2.3 to 4. The highest scoring reason in that the respondent cannot afford to buy a home, followed by the inability to find a suitable residence and the inability to afford rent.



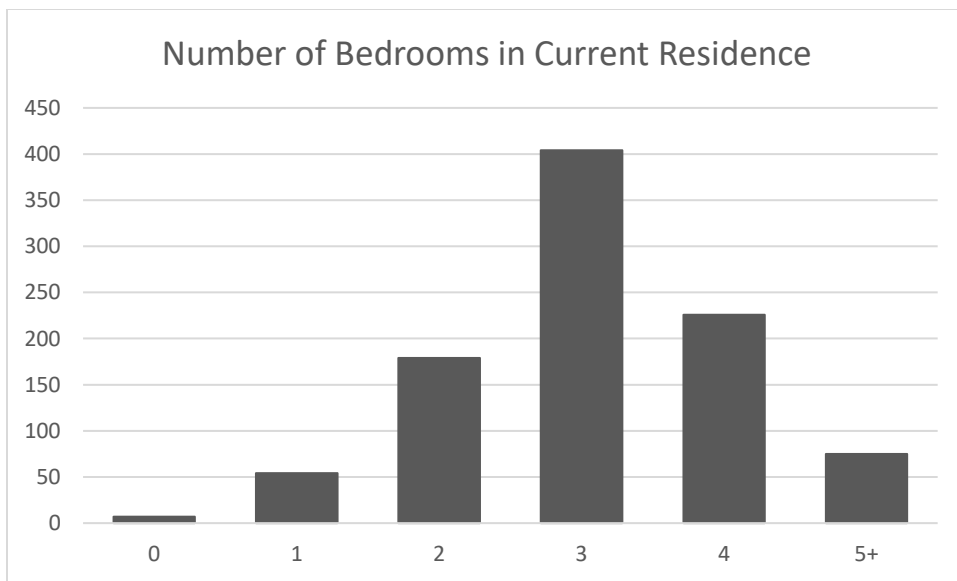
5. What type of residence do you live in?

Two-thirds of respondents live in a single-family home. About thirty percent live in apartments and condos or townhouses. Other living arrangements mentioned include mobile homes, and living with family, living in a basement, room or casita in someone else's home.



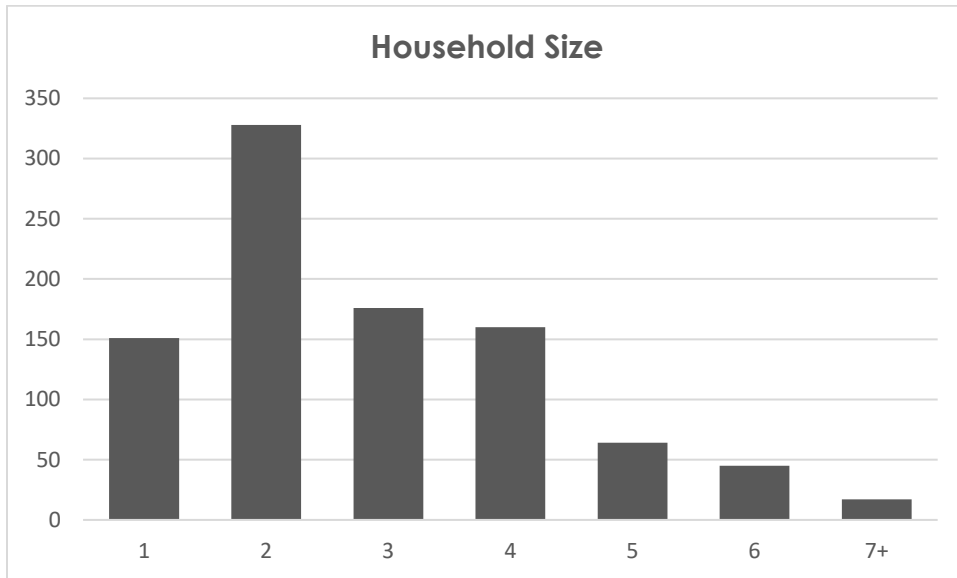
6. How many bedrooms are in your home?

Forty-two percent of respondents live in three-bedroom homes, followed by four and two bedrooms.



7. How many people including yourself live in your household?

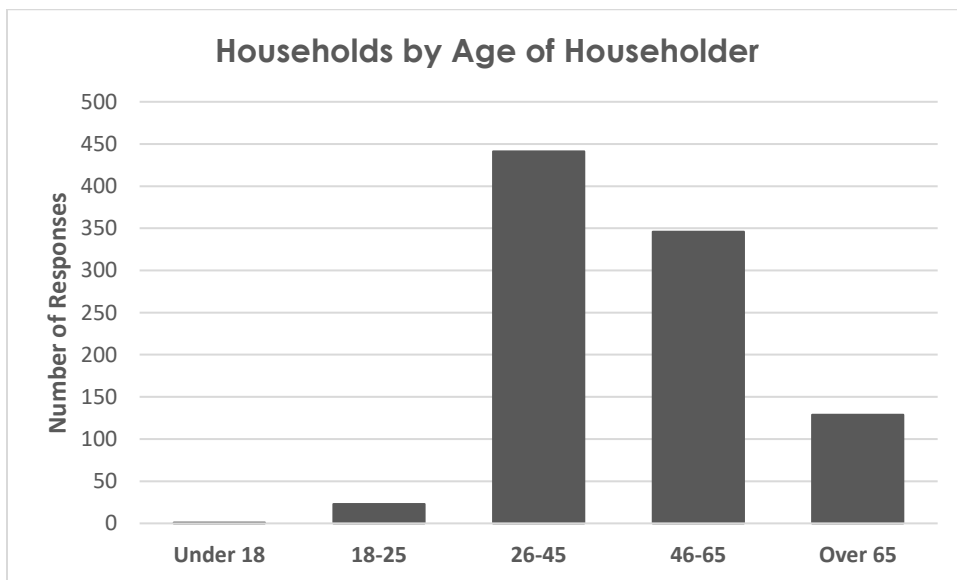
Thirty-four percent of people who responded to the survey live in two-person households, followed by three, four and two person households. The average household size for respondent households is 3.1 people.



8. How many people in your household are in the following age groups?

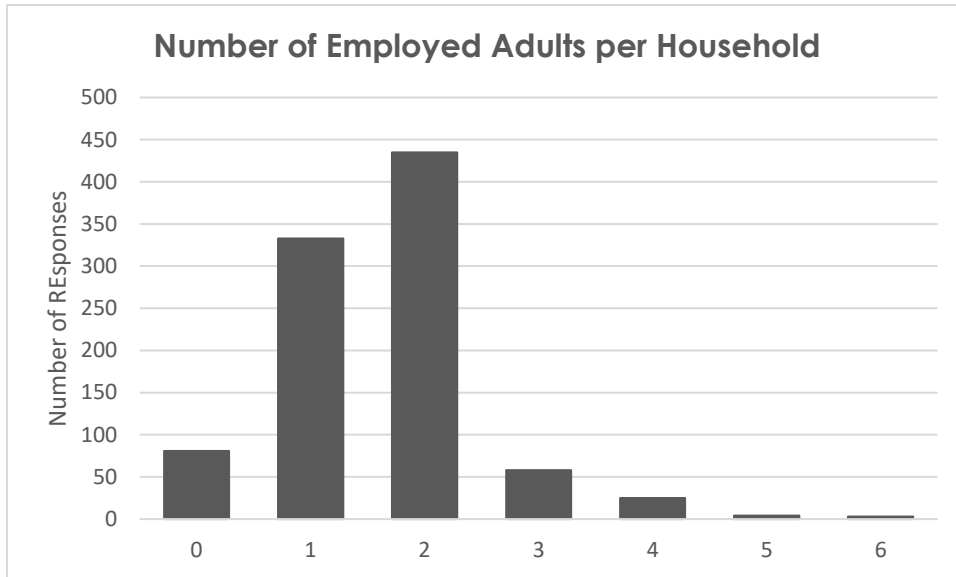
In 47 percent of the respondent households, the householder is age 26 to 45, and in 37 percent of respondent households the householder is age 46 to 65. In 14 percent of respondent households, the householder is over 65.

There are 378 households, which is about 40 percent of responses, with children under 18.



9. How many adults (age 18+) in your household are currently employed?

At least one adult is employed in 91 percent of respondent households. In 9 percent of households, all adults are retired.



10. Is anyone in your household disabled?

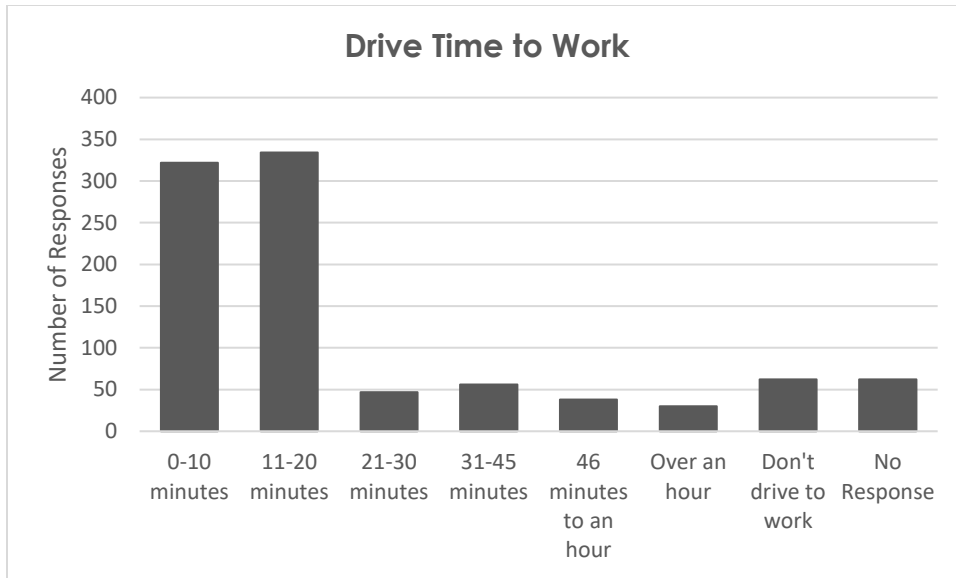
In 8.4 percent of respondent households someone is disabled and would need accessibility accommodations.

11-12. Work Locations

Ninety percent of respondents work in Los Alamos or White Rock. Ten percent of respondents work elsewhere. When there are other working adults in the household, 68 percent work in Los Alamos or White Rock and 32 percent work elsewhere.

13. How long does it take to drive from your house to your place of work?

The average drive time to work is 18 minutes. One third of respondents drive ten minutes or less to work, and 35 percent drive between ten and twenty minutes. Thirteen percent either don't drive to work or did not respond to this question.



14. Do you own or rent your residence?

Two thirds of respondents own their residences, thirty percent are renters, and the remaining three percent have other living arrangements. Most of the remaining three percent live with parents or other family.

15. Would you consider moving to a different home that better meets your needs if a suitable home were available?

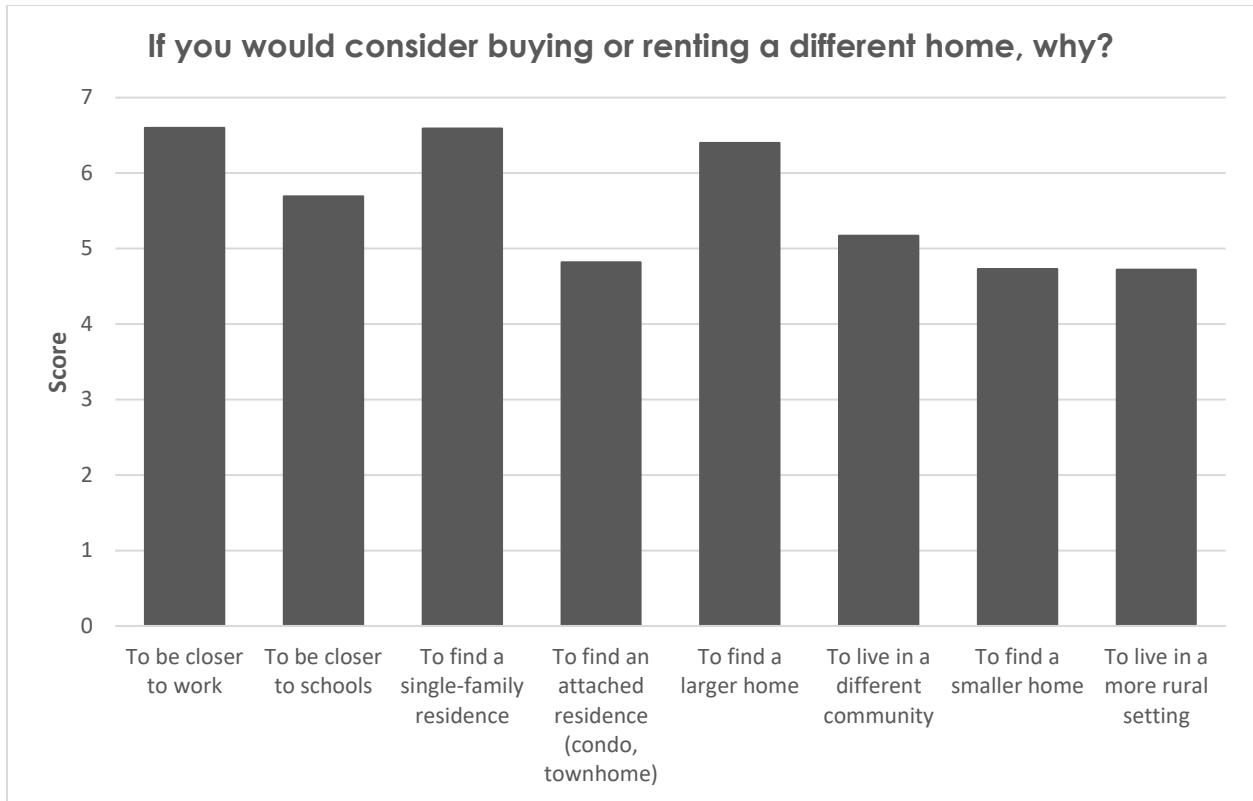
Seventy-three percent of respondents would move to a home that better meets their needs if a suitable home were available.

Respondents who responded that they would not consider moving were directed to the final page of demographic questions in the survey. The responses to questions 16 through 25 were answered by people who would consider moving.

16-17. Reasons why people would consider buying or renting a different home

Respondents were asked to rank the reasons why they would consider buying or renting a different home. The question provided eight reasons, which the respondents were to rank in order from 1 to 8. They had the option to identify reasons that didn't apply to them as "not applicable." They also had the opportunity to write in other reasons if their reason was not listed.

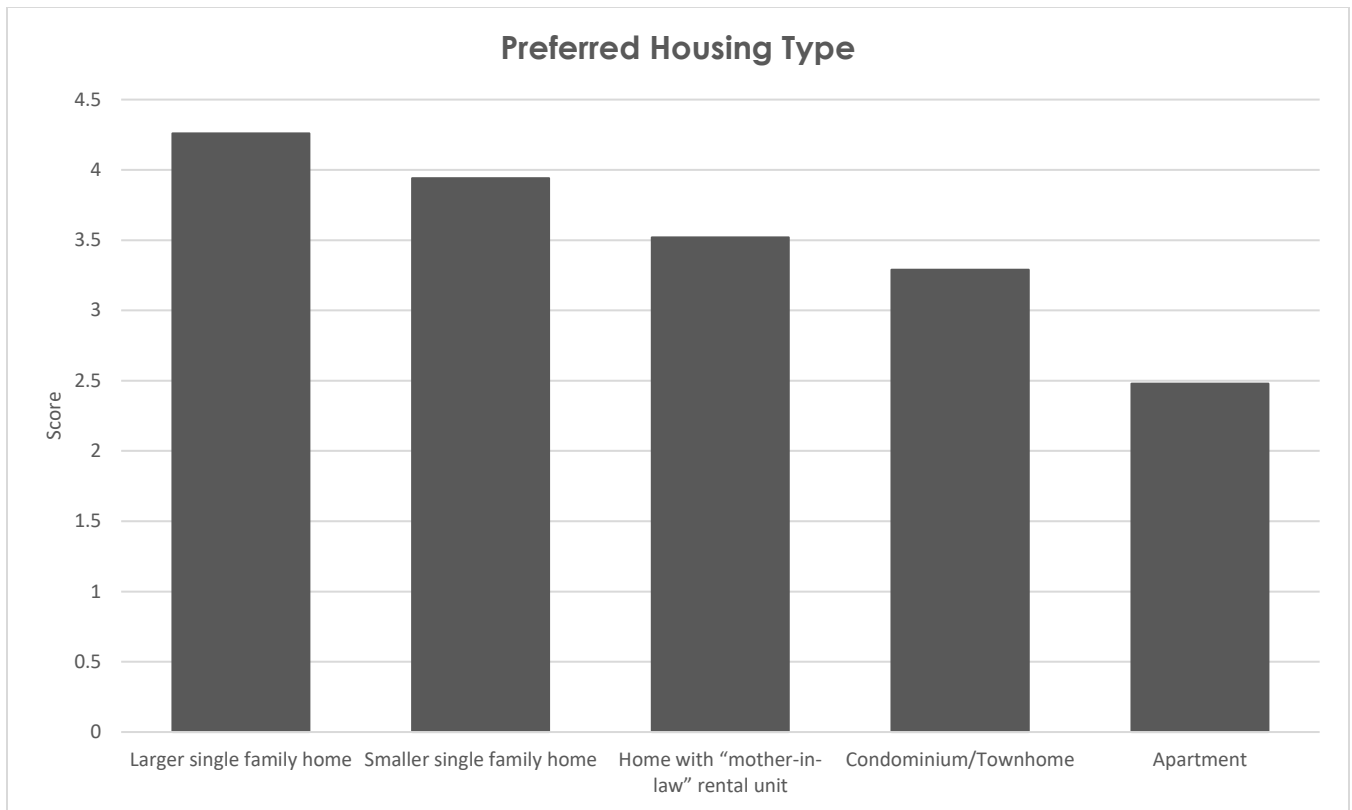
The top three reasons why people would consider buying or renting a different home are to be closer to work, to find a single-family residence, and to find a larger home. Each of these reasons scored above six on a range of one to seven. However, ten percent of respondents ranked "to find a smaller home" as their first priority.



Other reasons, or clarifications, included in the comments on this question were that retirees or soon to be retirees would consider downsizing, single people would like to be able to live alone but can't afford it, and the high cost of housing is stressful for both families and young professionals.

18-19. If you were to buy or rent a different home, what would you prefer?

Respondents were asked to rank their preferences for housing types. Five housing types were ranked from 1 to 5. Respondents had the opportunity to fill in another housing type if their preference was not listed.



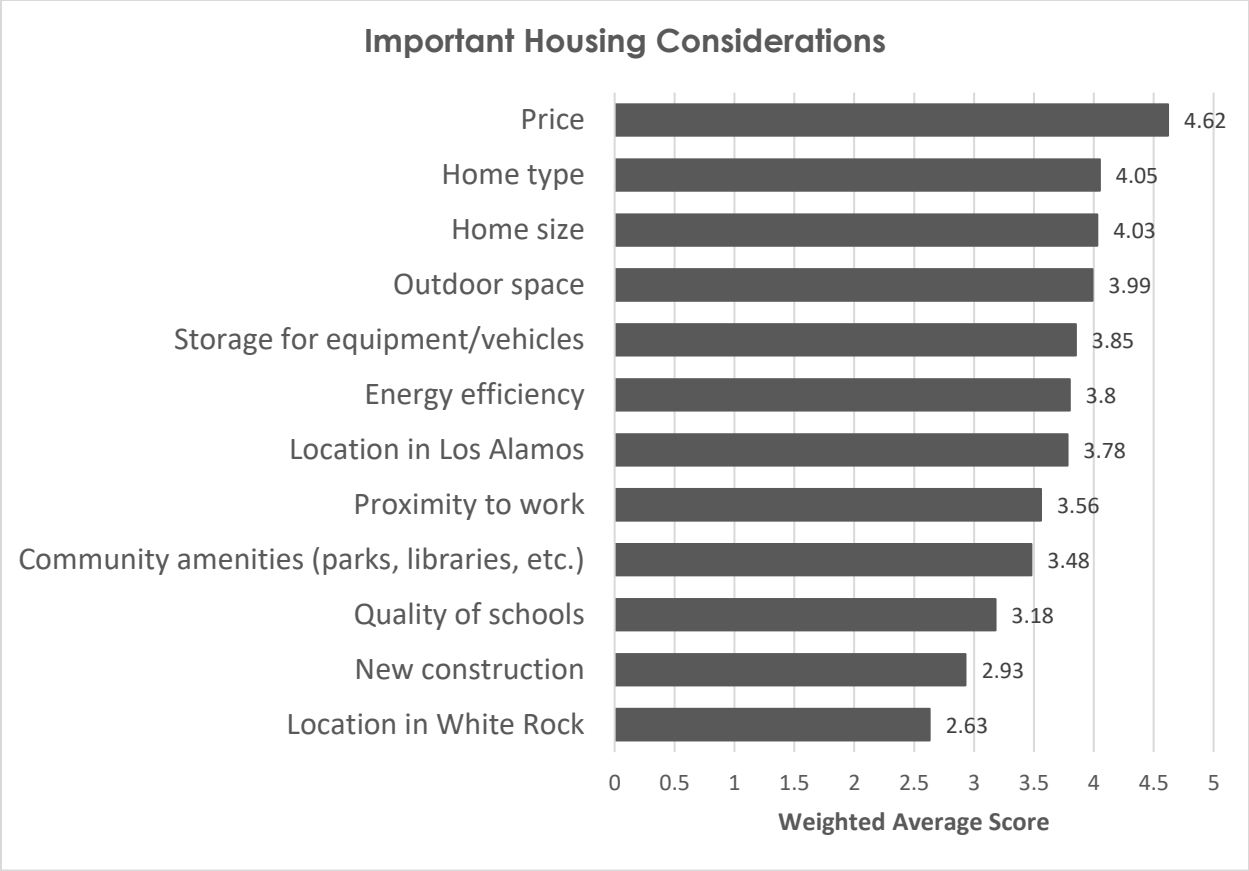
Most comments on this question were more specific descriptions of the type of house—single family with a larger lot, a more modern home, a one-story house, apartment on the ground floor, a house with more storage, an affordable home, etc. The other types of housing mentioned were a small home, including a modern tiny home, that could be placed on an existing lot. There is interest in homes with land for horses or other livestock.

20. If you were to move, would you prefer to buy or rent?

Most people (76 percent) would prefer to buy a home; eight percent would prefer to rent; and 16 percent would either buy or rent.

21. Please indicate how important the following factors are to you if you were looking for a different home.

Respondents were asked to rate on a scale of 1 (not at all important) to 5 (extremely Important) the importance of twelve things that they would consider in their decision to buy or rent a different home. The most important consideration is price, followed by home type, home size and the availability of outdoor space.



22. What features do you prefer in a home?

Respondents were asked their preferences for number of bedrooms, number of bathrooms and the number of garage spaces. A little over 40 percent prefer two bedrooms but approximately one-fourth of respondents prefer two or four bedrooms. More than half of respondents prefer two bathrooms, although approximately one-fourth prefer three bathrooms. More than half prefer a two-car garage, although 22 percent only need a one-car garage.

Housing Preferences	1	2	3	4	5+
Number of Bedrooms	3%	21%	43%	27%	5%
Number of Bathrooms	6%	65%	26%	3%	0%
Number of Garage Spaces	22%	63%	13%	1%	1%

23-25. Would you consider a small residential lot? A townhouse? A condo?

Recognizing the limited land available in Los Alamos County, the survey asked whether respondents would consider a small lot, a townhouse or a condo. Respondents were most amenable to a small residential lot. Over half would consider a townhouse, and 43 percent would consider a condo.

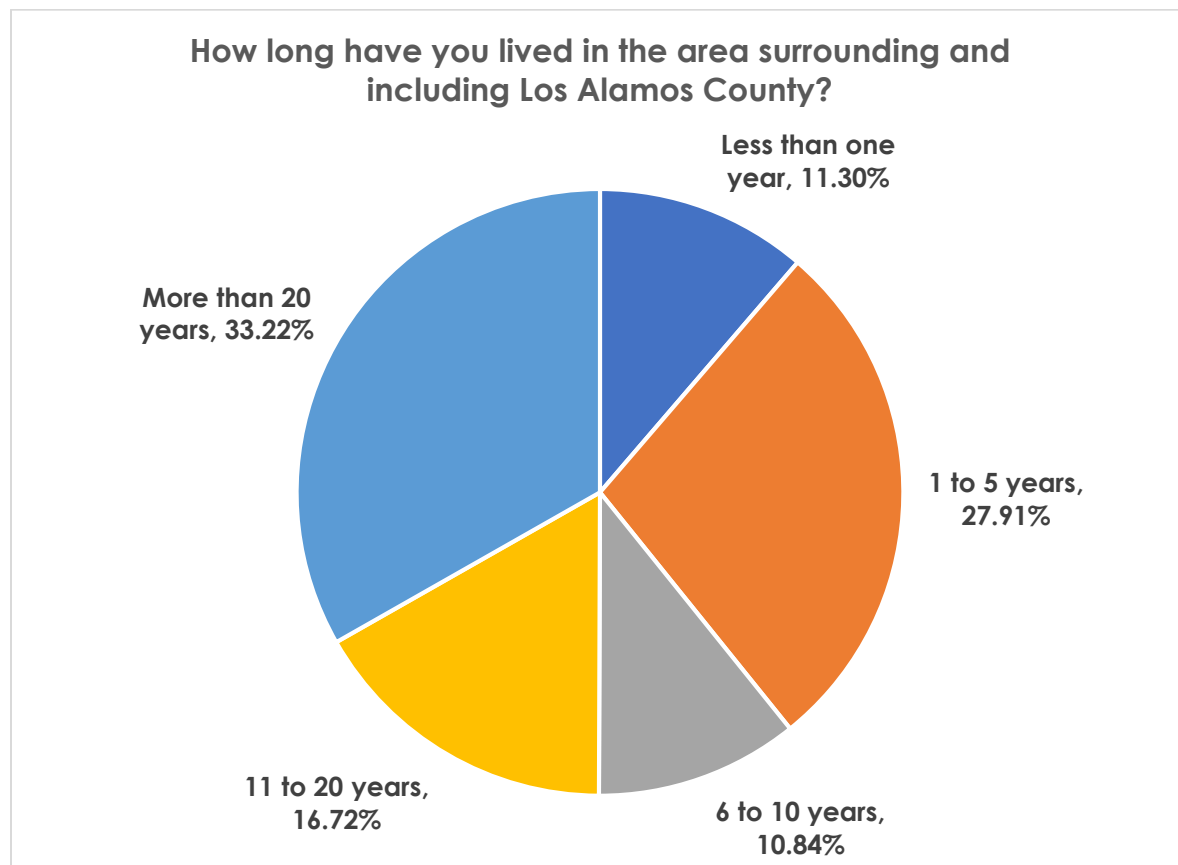
Housing Preferences	Yes	No
Would you consider a small residential lot?	68%	32%
Would you consider a townhouse?	52%	48%
Would you consider a condo?	43%	57%

Demographic Questions

The final questions in the survey were demographic questions to providing an understanding of who responded to the survey.

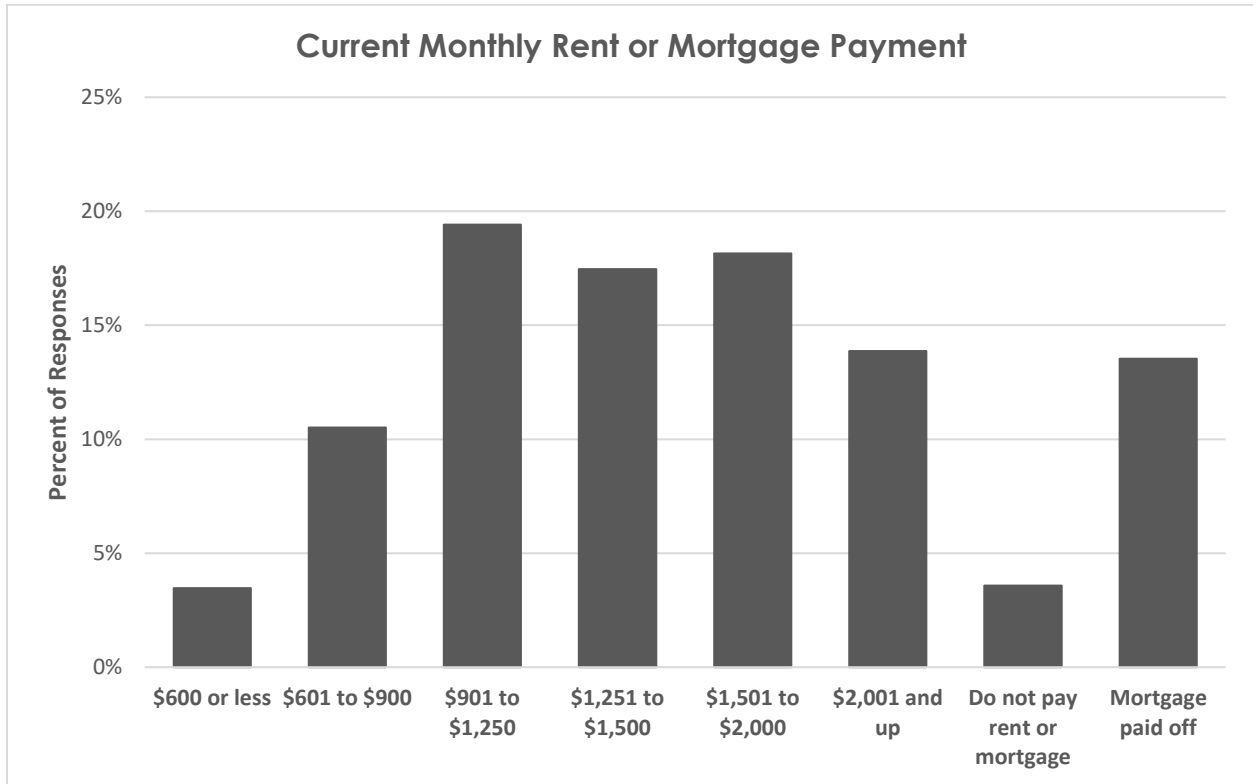
26. How long have you lived in the area surrounding and including Los Alamos County?

A third of respondents have lived in the area for more than 20 years, and 28 percent have lived in the area for one to five years. There were over 90 responses in each category.



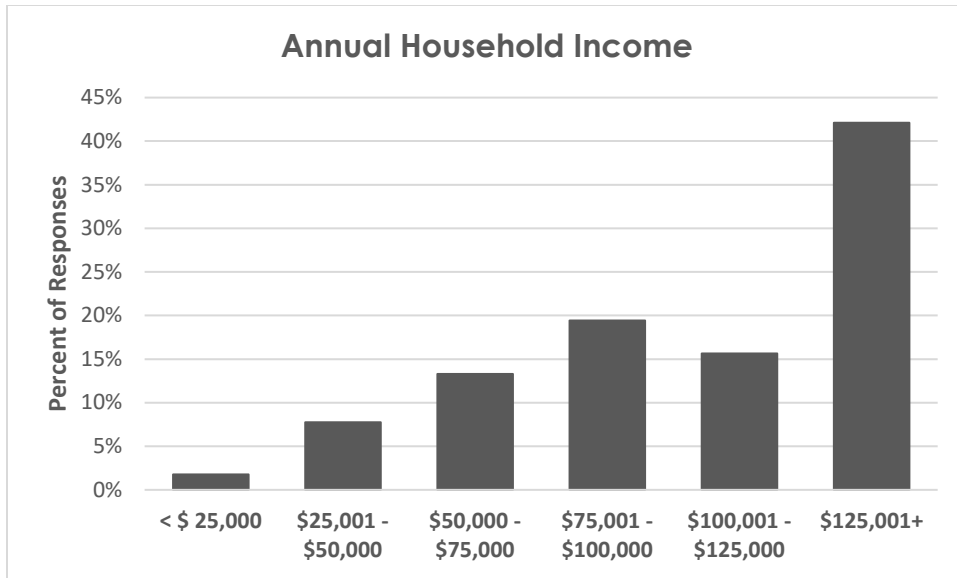
27. What is your current total monthly RENT or MORTGAGE PAYMENT?

Most current rent or mortgage payments range from \$901 to \$2,000, although 14 percent of respondents have paid off their mortgage and 14 percent have rent or mortgage payments greater than \$2,000. The high cost of housing is stressful for many of the respondents.



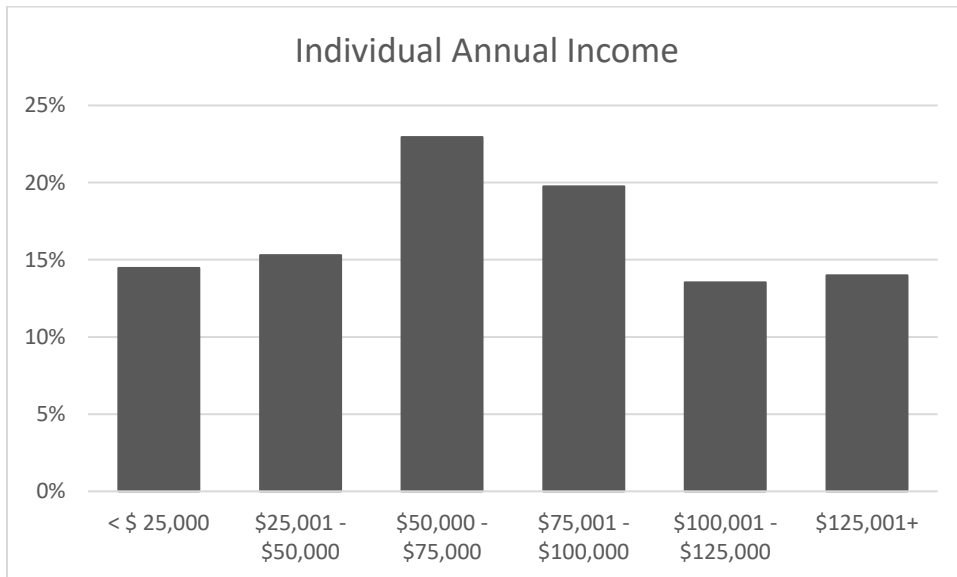
28. What is the combined gross annual income of all household members?

Over 40 percent of respondents have annual household incomes greater than \$125,000.



29. What is your individual annual income?

Individual annual incomes are spread across income ranges. The most frequent response was \$50,000 to \$75,000, followed by \$75,001 to \$100,000.



30. Do you have any additional comments or suggestions about housing in Los Alamos County?

Nearly half of respondents had additional comments about housing. Key themes in the comments were:

- Housing prices are very high for the quality

- Service workers are priced out of the market
- Convert vacant commercial buildings or properties into housing and mixed-use buildings
- Need to build up (four story height was mentioned) and have higher density housing
- Make more productive use of County and school land for housing—the golf course and stables were mentioned specifically
- Provide smaller homes for retirees. Senior/retirement housing was mentioned frequently. Housing units for seniors should be a single story.
- Provide dorms for students and apartments for small families and young adults
- Need more affordable housing—for sale and for rent
- Provide live-work housing
- Families have adult children who can't find or afford housing living with them. Would like them to have better housing options.
- Need better shopping and entertainment
- Older homes need to be better maintained and/or upgraded
- Don't make permitting so difficult so that older homes can be better maintained and upgraded
- Look at financial assistance to help lower income people maintain their properties
- Provide housing incentives and an affordable housing program for workers who aren't at the lab
- Concern that utilities need to be upgraded to handle additional homes and that utility costs could increase as a result
- Several respondents are post docs. Housing is top of mind as they consider working at LANL
- People should not have to rent rooms in their homes to meet the County's housing needs

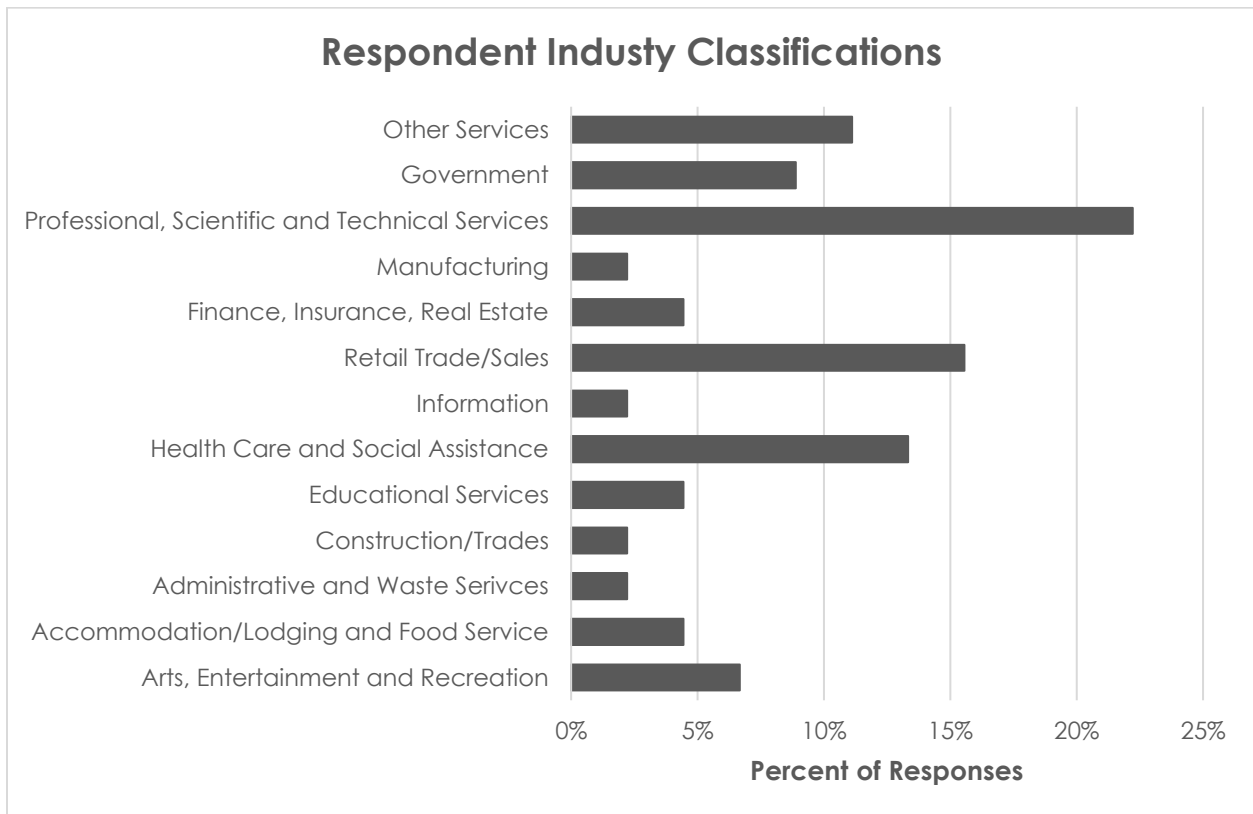
2. Employer Housing Needs Survey

1. Respondent Information

Respondents had the opportunity to provide basic information about their companies, including the name of the business, the location of company headquarters, their physical location in Los Alamos County, and a contact name and phone number or email address.

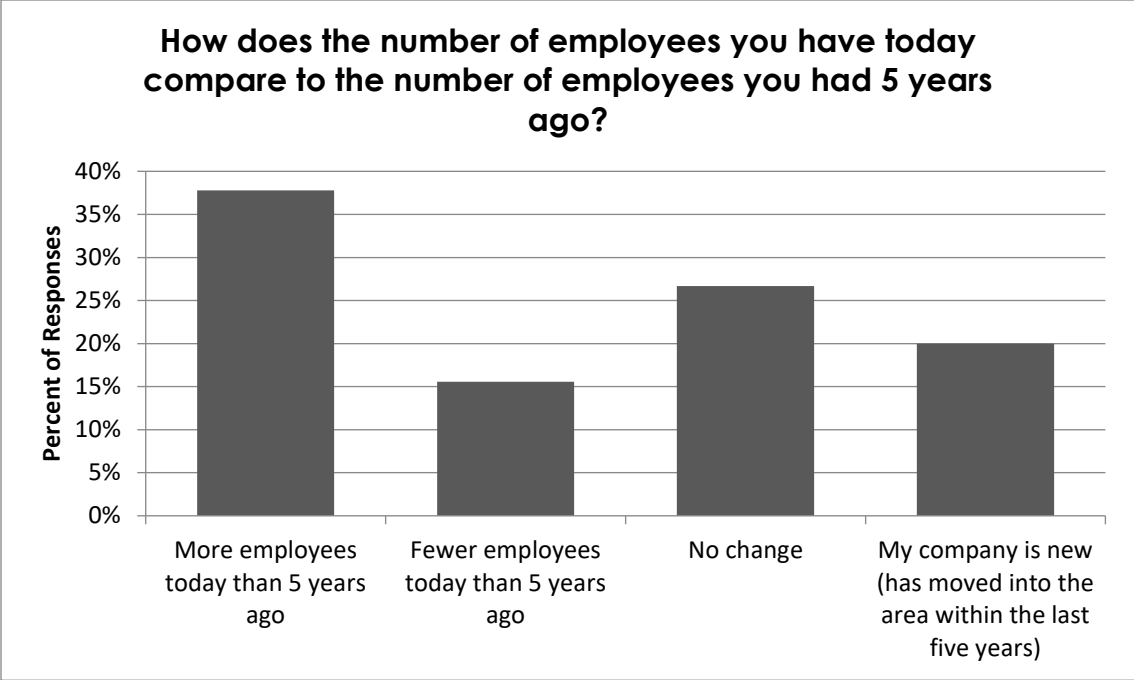
2. Type of Business

Respondent businesses represent a range of industries. Professional, Scientific and Technical Services is the largest category.



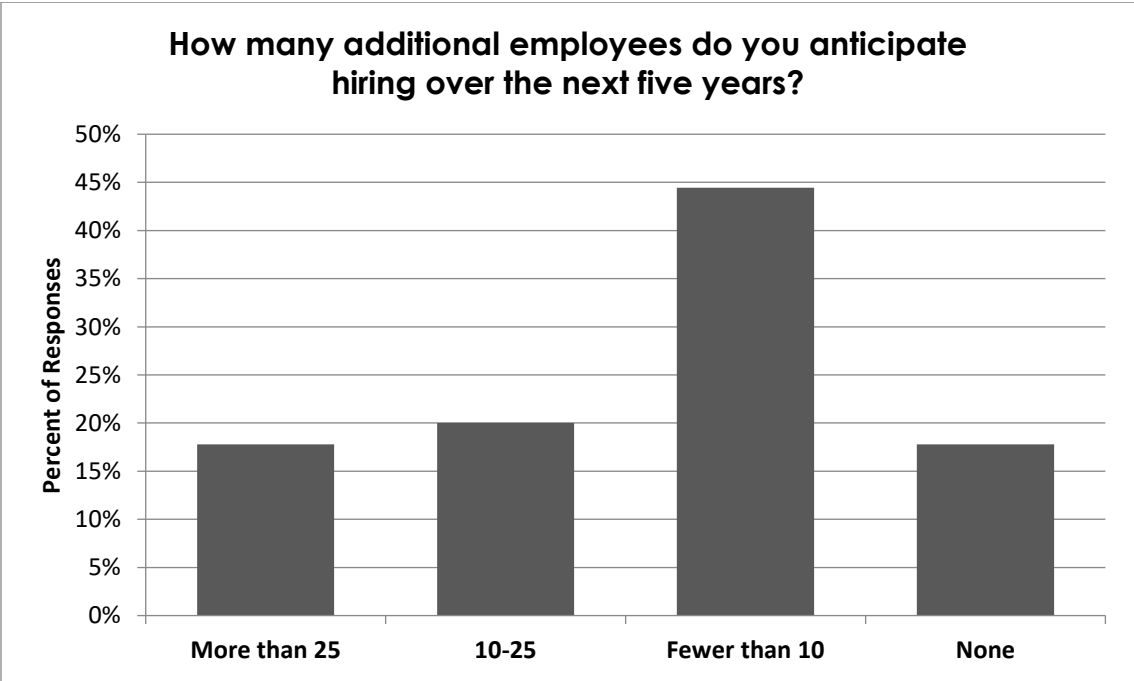
3. How does the number of employees you have today compare to the number of employees you had five years ago?

Most employers responded that they have more employees today than five years ago or no change. Twenty percent of the companies responding have moved to Los Alamos County within the last five years.



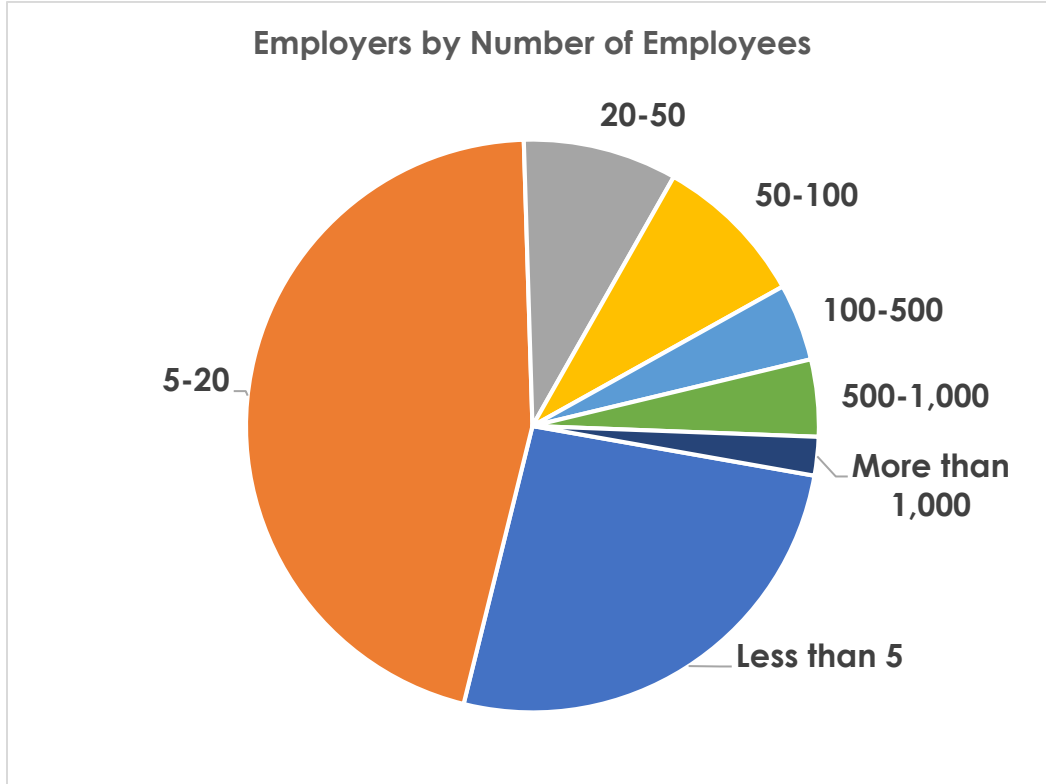
4. How many additional employees do you anticipate hiring over the next five years?

Most employers have plans to hire additional employees over the next five years. Forty-five percent anticipate hiring fewer than ten employees. One respondent said that they would only be hiring to replace employees who leave but would not be increasing the number of employees.



5. What is the current number of employees at your business location(s) in Los Alamos County only?

Most employers that responded to the survey have fewer than twenty employees. Five employers have more than 100 employees.



6. How many jobs at your company location in Los Alamos County are currently unfilled?

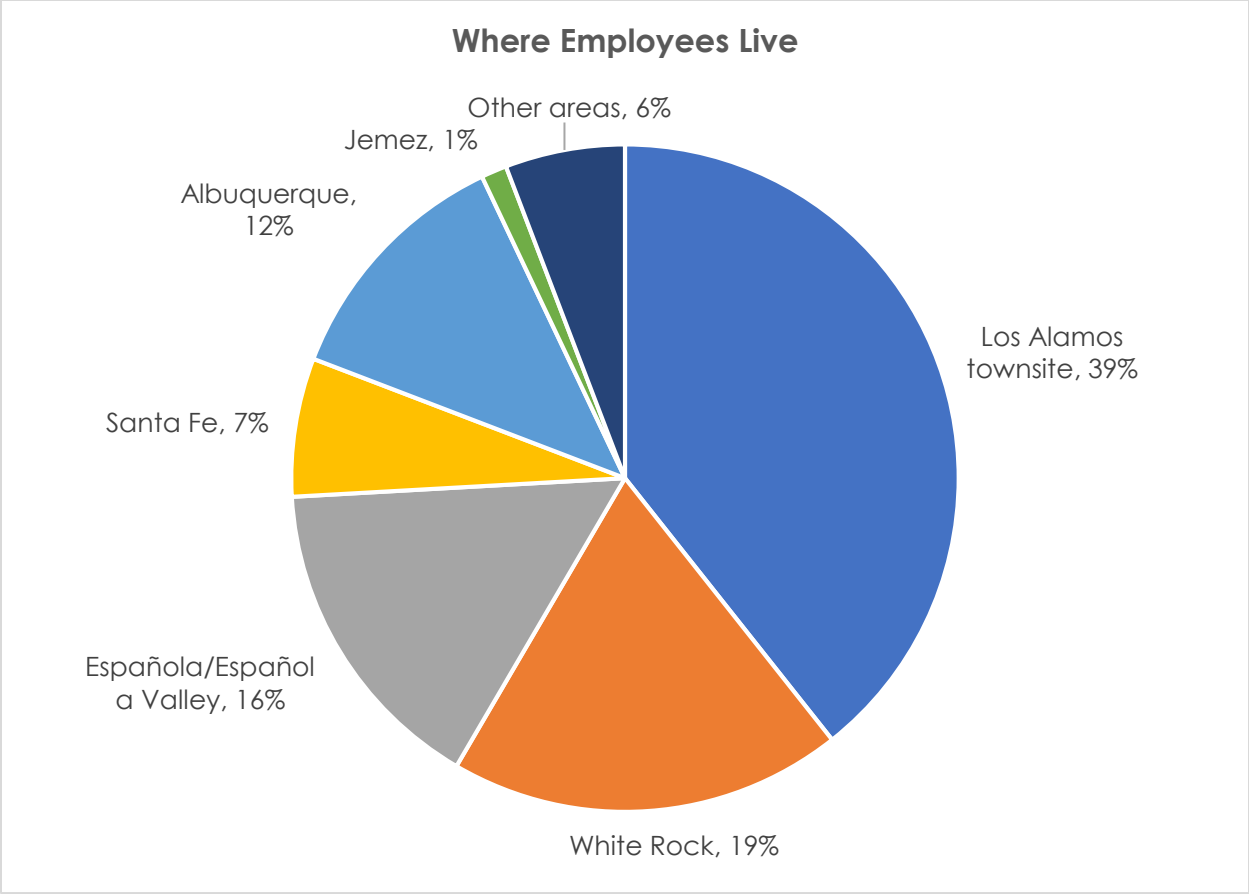
Half of respondents have unfilled positions. A total of 1,726 full time positions and 76 part time positions are unfilled.

7. Do you offer housing for any of your employees?

Six of the respondents provide housing for some employees. One employer has 12 apartments under contract, one houses employees brought to Los Alamos County from other offices, and the remaining provide housing for one to three employees.

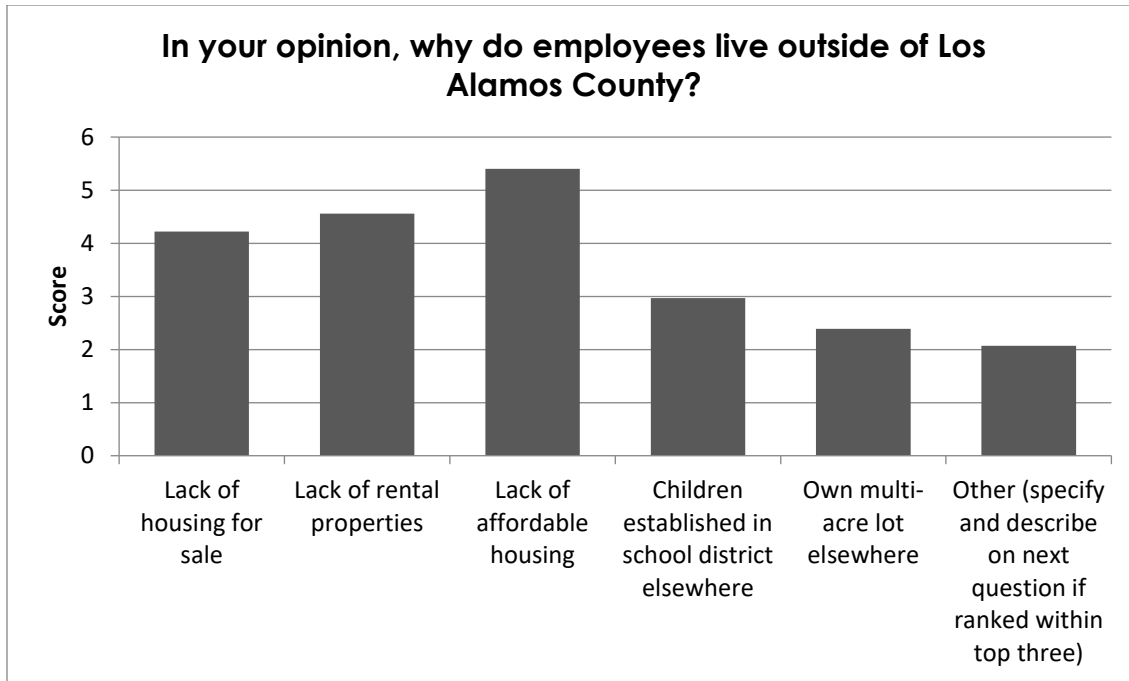
8. Please estimate the percent (%) of your employees that live in the following geographic areas:

In aggregate, employers estimate that a little over half of their employees live in the Los Alamos townsite and 26 percent live in White Rock.



9. In your opinion, why do employees live outside of Los Alamos County?

Employers were asked to rank six reasons that employees live outside of Los Alamos County. The responses were scored on a range from 1 to 6. Lack of affordable housing was the highest scoring reason, followed by a lack of rental properties and a lack of housing for sale. Respondents were asked to describe other reasons why employees live elsewhere if “Other” was in the top three reasons. The other reasons mentioned are singles seeking better social opportunities, choosing to live with or near family in other communities, the high cost of childcare and the family lives where the spouse works.



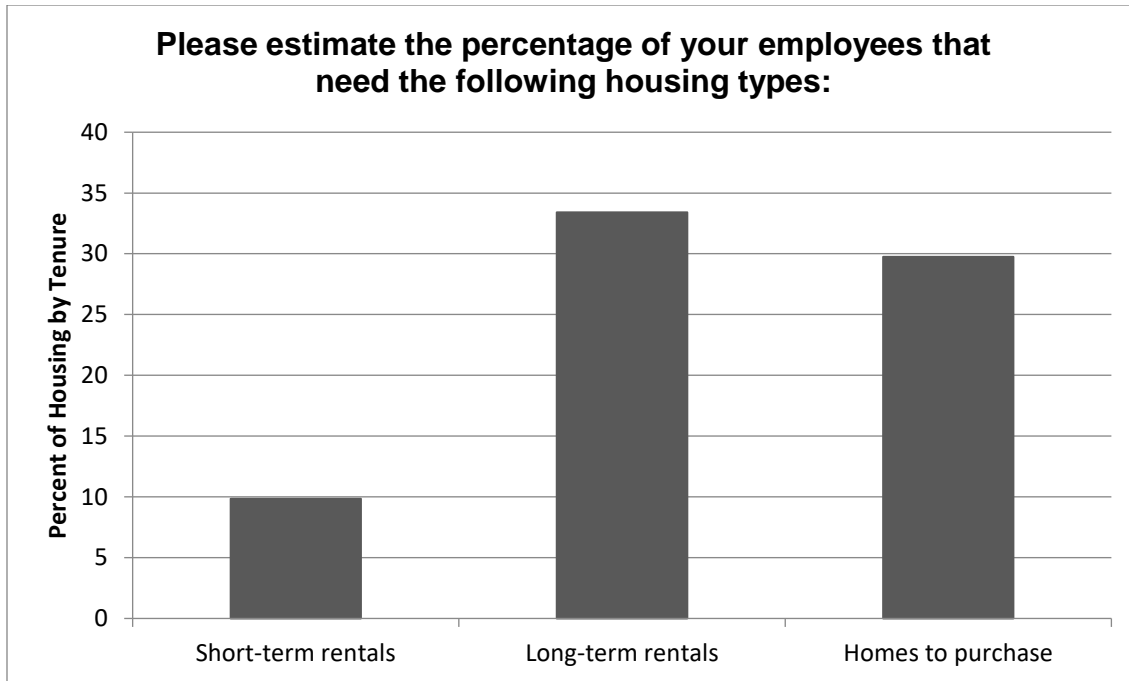
10. If you ranked "Other" in your top three on question 9, please describe.

Other reasons that employees live outside of Los Alamos County include:

- Singles seeking better social opportunities
- Families are established in other areas
- Childcare is expensive and hard to find in Los Alamos County
- Housing is more expensive than other areas
- The family lives where the spouse is employed

11. Please estimate the percentage of your employees that need the following housing types:

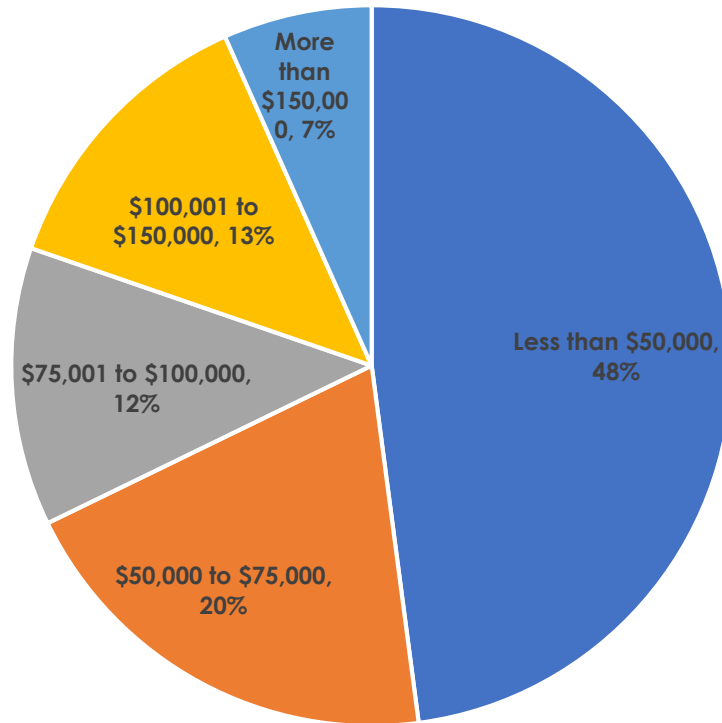
Employers were asked to estimate the types of housing needed by their employees by tenure. On average, employers believe that nearly 35 percent need long term rentals, 30 percent need homes to purchase, and ten percent need short term rentals.



12. Approximately what percent of your employee salaries fall within the following ranges? This information will help Los Alamos County determine the appropriate price and rent levels for new housing.

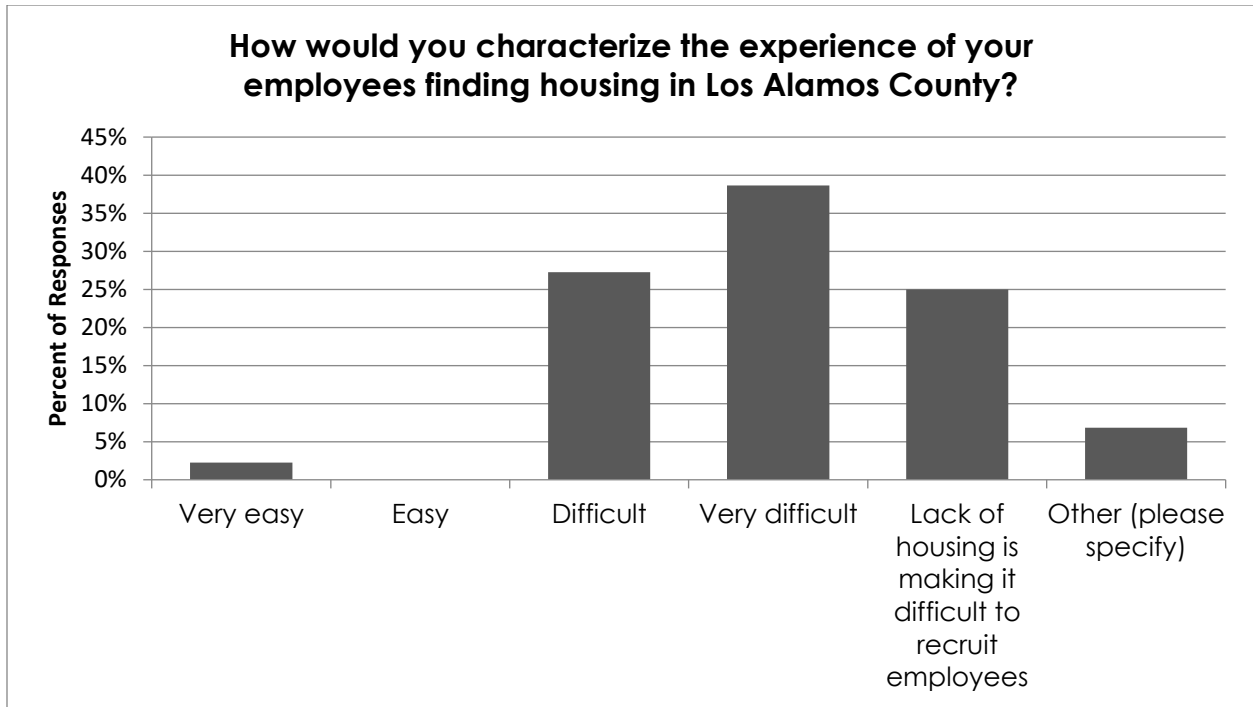
Employers who responded to the survey tend to hire at salaries lower than the County average. Nearly half of the employees when employers reported salary ranges have an annual salary of less than \$50,000, and 20 percent have annual salaries between \$50,000 and \$75,000.

Average Percentage of Employees by Income Range



13. How would you characterize the experience of your employees finding housing in Los Alamos County?

Employers report that it is difficult for their employees to find housing, and 25 percent of employers believe that lack of housing makes it difficult for them to recruit employees. The employers who selected "other" are either sole proprietors or the company provides housing for employees.



14. If you answered "difficult", "very difficult", "lack of housing is making it difficult to recruit employees" or "other", why are your employees having difficulty finding housing?

Lack of availability and cost were the factors mentioned most often as to why employees have difficulty finding housing. Housing in poor condition, a lack of land for new housing, and a lack of higher densities and apartments were also mentioned.



15. Do you have any additional comments concerning housing for your employees?

- Employers commented that both homeownership and renting are expensive. Housing availability and affordability are most needed, but employees also want more social opportunities. Employers recognize that social opportunities may be harder to address than housing.
- Employers believe that housing prices are set based on wages at LANL, and employees at retail and service businesses outside of the lab do not have the same incomes.
- One employer only hires part time college students who can live with parents or with roommates.
- Transportation and day care costs also make it difficult to hire and retain employees.
- Housing is only part of the issue. Congestion at peak times is a problem. One employer commented that NM 4 needs to be expanded to two lanes to the NM 502 interchange.

C. Housing for Sale in September 2019

	Price	# of Bedrooms	# of Bathrooms	Sq./Ft.	Address	Location	Type
	\$820,000	4	4	4043	1105 Los Pueblos St.	Los Alamos	House
	\$775,000	5	5	3770	825 46th St.	Los Alamos	House
	\$650,000	3	3	3686	1347 Big Rock Loop	Los Alamos	House
	\$639,000	5	3	3415	75 Kachina St.	Los Alamos	House
	\$630,000	4	3	2632	193 Piedra Loop	Los Alamos	House
	\$625,000	4	3.5	3009	124 Piedra Loop	Los Alamos	House
	\$595,000	4	4	2,594	34 Canyon View,	Los Alamos	Condo
	\$575,000	3	2	2,035	303 Andanada St.	Los Alamos	House
	\$570,000	6	3	3,798	1926 Mendius Ln	Los Alamos	House

	Price	# of Bedrooms	# of Bathrooms	Sq./Ft.	Address	Location	Type
	\$550,000	3	3	2,247	32 Canyon View	Los Alamos	Condo
	\$489,000	4	3	2,712	238 Loma Del Escolar St.	Los Alamos	House
	\$450,000	3	3	2,496	4715 Quemazon	Los Alamos	TH
	\$395,000	2	3	2,328	4712 Quemazon	Los Alamos	Condo
	\$389,000	3	4	2,116	400 Oppenheimer Dr.	Los Alamos	TH
	\$325,000	3	2	1,303	4849 Yucca St.	Los Alamos	House
	\$270,000	3	2	1,512	931 Alamo Rd.	Los Alamos	House
	\$235,000	2	2	1,437	3 Village Pl.	White Rock	Condo
	\$220,000	2	1	1,058	3425 Pueblo Dr.	Los Alamos	House
	\$180,000	3	1	780	3931 Trinity Dr. Unit A	Los Alamos	TH

	Price	# of Bedrooms	# of Bathrooms	Sq./Ft.	Address	Location	Type
	\$148,500	2	1	950	3458 Urban St.	Los Alamos	Quad
	\$129,000	1	1	784	505 Oppenheimer Dr.	Los Alamos	Condo

Source: Multiple Listing Service