# MONTGOMERY COUNTY HOUSING NEEDS ASSESSMENT AND HOUSING PREFERENCES SURVEY SCOPES OF WORK

The Planning Board will receive a briefing on the Scopes of Work for the Housing Needs Assessment and Housing Preferences Survey. The Planning Board will vote to approve the scope of work for both projects.

Bhavna Sivasubramanian, Planner II, Design, Placemaking & Policy Division
bhavna.sivasubramanian@montgomeryplanning.org , 301-495-4537

Caila Prendergast, Planner III, Design, Placemaking & Policy Division
caila.prendergast@montgomeryplanning.org , 301-495-4542

Lisa Govoni, Planning Supervisor, Design, Placemaking & Policy Division
lisa.govoni@montgomeryplanning.org, 301-650-5624

Atul Sharma, Chief, Design, Placemaking & Policy Division
atul.sharma@montgomeryplanning.org,  301-495-4658

Bridget Broullire, Deputy Director of Administration, Director's Office
bridget.broullire@montgomeryplanning.org, 301-495-4507

## SUMMARY

Montgomery Planning is updating Montgomery County's Housing Needs Assessment and conducting a new Housing Preferences Survey to inform long-term housing policy and planning. Together, these efforts will assess current housing conditions, identify future needs through 2050, and capture resident perspectives on housing priorities, preferences, and tradeoffs. Findings will support a potential Housing Functional Plan and help guide policy, investment, and planning decisions. The two projects will be completed by September 2026, with interim findings and briefings to the planning board and county council throughout 2025 and 2026.

Planning Staff are requesting Board approval for the Scopes of Work for the Housing Needs Assessment and the Housing Preferences Survey.

## INFORMATION

## TABLE OF CONTENTS

## INTRODUCTION AND PURPOSE

Montgomery Planning is undertaking a Housing Needs Assessment (HNA) and a Housing Preferences Survey (HPS) to support the County's long-term housing policy and planning efforts. These efforts are designed to reflect both measurable housing needs and resident perspectives, ensuring that future strategies are grounded in data and informed by community priorities.

Montgomery County's last Housing Needs Assessment was completed in 2020 using data through 2018. Since then, the housing landscape has shifted due to changes in the economy, population, and policy environment—including the adoption of *Thrive Montgomery 2050*. A new assessment is needed to reflect current conditions and better prepare for future challenges. These broad shifts have also resulted in changes in people's individual housing preferences – where they want to live, what type of house they want to live in, what public amenities they want near their house, and how much they are willing to pay for those amenities. The Housing Preferences Survey will help to understand what neighborhood and housing characteristics a particular community values and how these desires vary across demographic groups and geographic contexts.

Together, the HNA and HPS will form a strong technical and community-informed foundation for a potential FY27 Housing Functional Plan (pending Planning Board and Council approval) and related housing initiatives.

The HNA and HPS were approved with funding by the County Council for the Department's FY26 work program.

## HOUSING NEEDS ASSESSMENT

### OBJECTIVES

The HNA will provide a comprehensive evaluation of how Montgomery County's housing supply aligns with the current and future needs of residents, as well as the vision set forth through foundational policy guidance in *Thrive Montgomery 2050*. It will analyze demographic shifts, affordability challenges, housing availability by type and cost, and access barriers across different geographies and populations. The assessment will identify current gaps in the housing stock—such as shortages by income level or household size—and use regional forecasts and economic trends to estimate future demand through 2050. Particular attention will be paid to households facing housing instability, including those experiencing cost burden, overcrowding, and homelessness.

Planning Department Staff from the Housing, Zoning, and Infrastructure team (part of the Design, Policy & Placemaking Division) will lead the analysis, with the National Center for Smart Growth (NCSG) providing technical expertise on long-range housing projections.

### DELIVERABLES

The results of the HNA will be a full report supported by summary materials and a presentation slide deck. The report will present findings from the housing conditions analysis, gap assessment, and demand projections, illustrated through maps, charts, and tables. The report will also be summarized in staff reports and slide decks for briefings to the Planning Board and County Council. Planning Staff will manage and conduct the majority of the work, collaborating with NCSG on the projections component.

## TIMELINE

Internal coordination and scope development began in July 2025, followed by conversations with the National Center for Smart Growth regarding support on the projections portion of the scope. Data collection and analysis will begin upon approval of the scope and will continue through the end of 2025. Preliminary findings will be developed and shared internally between February and April 2026, with a Planning Board presentation of early insights scheduled during that same period. A full draft of the report will be developed in May and June 2026, with final Planning Board and Council presentations planned for June and July 2026. The final report will be completed and published by September 2026.

## HOUSING PREFERENCES SURVEY

## OBJECTIVES

The Housing Preferences Survey (HPS) aims to better understand residents' preferences, priorities, needs, concerns, and challenges when making housing choices. The HPS will gather a representative and statistically significant sample of county residents, with the following objectives:

- Document top housing preferences at the countywide level and across sub-geographies
- Understand housing preferences across different demographic groups
- Describe implications of the findings for meeting the housing needs in the county
- Create a detailed report with informative graphics of the county's top housing preferences
- Raise awareness about the facts, data, and findings using clear communication strategies

## DELIVERABLES

For the Housing Preferences Survey, Montgomery Planning will solicit qualified vendors through a Request for Proposal (RFP) process to select an appropriate consultant to execute the housing preferences survey. The consultant will be responsible for developing the survey instrument, creating a representative sampling plan, administering the data collection, conducting the data analysis, and producing a comprehensive report of the survey findings. As part of the RFP process, the applicants will propose a methodology for survey sampling and survey execution, and this approach will be evaluated when selecting the consultant. Planning Staff from the Housing, Zoning, and Infrastructure team will manage the consultant through the entire survey process and provide technical support on the project as needed. The final deliverables from the consultant will include a full report, summary

materials, and a slide deck suitable for presentations to the Planning Board, Council, and broader audiences.

## TIMELINE

The timeline for the HPS aligns with that of the HNA, with additional time allocated at the beginning of the project for the RFP process. Following the procurement of an external consultant by December 2025, the survey instrument will be developed and implemented in early 2026. Data preparation and analysis will take place through April 2026, followed by preliminary findings shared with Planning Staff, Department leadership, and other key internal stakeholders as appropriate. A full draft of the report will be developed by the consultant in May and June 2026, with final Planning Board and Council presentations planned for June and July 2026. The final report will be completed and published by September 2026.

## ATTACHMENTS

- **Attachment 1**: Housing Needs Assessment Scope of Work
- **Attachment 2**: Housing Preferences Survey Scope of Work