



## SOUTHERN NEVADA STRONG

**DATE:** June 2, 2025  
**TO:** Housing Task Group  
**FROM:** EConorthwest & RTC  
**SUBJECT:** Housing Task Group Meeting #2 Agenda

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**Date:** June 18, 2025

**Time:** 10:00 – 11:30 AM PST

**Location:** Virtual

### 1. Welcome and Re-introductions

**Time:** 10:00 AM – 10:15 AM (15 minutes)

### 2. Project Progress Update

**Time:** 10:15 AM – 10:35 AM (20 minutes)

### 3. Regional Housing Needs Assessment Presentation and Discussion

**Time:** 10:35 AM – 11:25 (50 minutes)

### 4. Next Steps and Action Items

**Time:** 11:25 AM – 11:28 AM (3 minutes)

### 5. Open Forum and Adjournment

**Time:** 11:28 AM – 11:30 AM (2 minutes)





## Housing Task Group

### MEETING #2 SUMMARY

Wednesday, June 18, 2025  
10:00-11:30 AM

Virtual

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#### Overview

The RTC has launched the Southern Nevada Strong (SNS) 2050 Regional Plan Update, a new plan driven by our community to bring housing we can attain, higher-paying jobs, and better ways to get around the region for everyone. To support this effort, a dedicated Housing Task Group was formed to assess current and future housing needs and identify strategies to address them across the region.

The first task group meeting built on initial conversations about regional housing needs. Participants received a 2025 legislative update from Maurice Page of the Nevada Housing Coalition, reviewed key takeaways from the first meeting's SWOT analysis, and heard updates on other components of the Southern Nevada Strong Regional Plan update, including the Housing Market Report, Activity Centers Analysis, and Scenario Planning. ECONorthwest resented the draft Housing Needs Assessment, which estimates total and localized housing needs by income level. The group discussed how the findings align with their experience, factors driving housing outcomes, and how success should be measured across scenarios.

#### Participants

Housing Task Group members in attendance included representatives from:

- ◆ City of Henderson
- ◆ City of Mesquite
- ◆ Nevada Bankers Association (NBA)
- ◆ Nevada Homes Alliance (NHA)
- ◆ Las Vegas Community Transitional Services (CTS)
- ◆ Clark County Comprehensive Planning and Housing Departments

- ◆ Nevada Rural Housing (NRH)
- ◆ Nevada Housing Coalition (NHC)
- ◆ Corporation for Supportive Housing (CSH)
- ◆ Bureau of Land Management (BLM)
- ◆ Lied Center for Real Estate at UNLV
- ◆ G2 Capital Development
- ◆ Private Developer Groups

## Agenda

- ◆ Welcome and Introductions
- ◆ Project Progress Update
- ◆ Regional Housing Needs Assessment Presentation and Discussion
- ◆ Next Steps and Action Items
- ◆ Open Forum and Adjournment

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## Welcome and Introductions

Tyler Bump (ECONorthwest) opened the meeting with a welcome and introduced the project team. Task group members then introduced themselves.

Maurice Page (Nevada Housing Coalition) provided an overview and update on 2025 housing-related legislation.

Maurice shared that over 1,200 bills were introduced during the session, with 64 focused on housing. Of those, 26 were signed into law. The legislation addressed a range of topics, including affordable and supportive housing, tenant rights, rental assistance, fair housing, redevelopment, zoning and land use, property tax, and tax abatements.

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## Project Progress Update

Tyler Bump (ECONorthwest) provided a project progress update, highlighting how housing fits within the broader scope of the Southern Nevada Strong (SNS) 2050 Regional Plan Update. He reviewed project developments since the first Housing Task Group meeting and

explained the role of the three technical workflows: the Housing Needs Assessment, Activity Centers Analysis, and Scenario Planning.

The presentation emphasized that these components work together to inform regional decision-making and help identify where and how to focus future investments. The Housing Task Group's input will play a key role in refining assumptions and guiding priorities for upcoming phases of work.

Key takeaways from the project update included:

- ◆ The **SWOT analysis summary** revealed strong consensus around regional strengths (e.g., economic growth, access to land), as well as challenges (e.g., rising costs, regulatory complexity) that need to be addressed collaboratively.
- ◆ The **Activity Centers Analysis** is identifying locations that can support more intensive, mixed-use development tied to transportation access and infrastructure readiness.
- ◆ The **Scenario Planning process** will test policy and investment strategies against different growth trajectories, helping stakeholders understand tradeoffs and impacts.
- ◆ A **Housing Market Report** is in development, documenting recent trends in prices, production, and household characteristics across Southern Nevada.
  - Feedback from the first Housing Task Group meeting, particularly around data gaps, land constraints, and federal land access, has been incorporated into ongoing work.

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## Regional Housing Needs Assessment

Tyler Bump (ECONorthwest) presented preliminary findings from the Regional Housing Needs Assessment (HNA), which estimates the total number of housing units needed in Southern Nevada by income level to meet current and future demand. The presentation outlined the methodology behind the assessment, introduced key market drivers shaping housing need, and emphasized the HNA's role in supporting a data-informed and equitable housing strategy as part of the SNS 2050 Regional Plan Update.

Key findings shared in the presentation included:

- ◆ The region needs an estimated 445,000 additional housing units by 2050 to keep pace with projected growth.
- ◆ There are housing needs across all income levels, but the greatest gaps exist for households earning below 50% of Area Median Income (AMI).
- ◆ Within the lowest income tiers, the report emphasizes the importance of distinguishing between needs for supportive, transitional, and deeply affordable housing.

- ◆ Market forces: such as land costs, construction expenses, and debt financing—are outpacing income growth, especially for renters, creating challenges in aligning housing production with actual demand.
- ◆ The American Community Survey (ACS) provides useful renter data, but limitations in how renter households are categorized require further clarification in the final report.
- ◆ The HNA methodology integrates elasticity assumptions and vacancy rates to model future demand, though several attendees noted the importance of communicating those assumptions clearly and aligning them with benchmarks like the National Low-Income Housing Coalition and AB 213 datasets.

The discussion that followed focused on the first guiding question: **Do our findings match your experience and understanding of needs in the area that you work in?**

Participants shared that the findings largely resonated with their experiences, particularly the emphasis on need below 50% AMI and the challenges in accessing affordable and supportive housing. Attendees also stressed the importance of refining definitions (e.g., “houselessness,” “need”) and exploring how multigenerational households, shared housing, and regional wage disparities impact housing outcomes. Several participants expressed interest in seeing more granular data to guide targeted interventions.

Due to time constraints, the group was not able to address the remaining two discussion questions. However, feedback from this session will inform refinements to the HNA and future components of the SNS 2050 Regional Plan.

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## Next Steps and Action Items

To close the meeting, EConorthwest outlined next steps and upcoming opportunities for continued engagement. Participants were informed that a draft of the Housing Market Report would be circulated for review, along with a summary of the Housing Needs Assessment findings. Feedback from Task Group members will be used to refine both documents and inform broader scenario planning work.

### Key next steps include:

- ◆ Review and comment on the draft Housing Market Report and preliminary Housing Needs Assessment outputs.
- ◆ Incorporate Task Group feedback into the refinement of housing need methodology and scenario assumptions.
- ◆ Prepare for upcoming planning phases, including the integration of housing, land use, and transit data into scenario modeling efforts.

# Southern Nevada Strong

## Regional Plan Update



## Housing Task Group

Meeting #2 June 18, 2025



# SOUTHERNNEVADASTRONG

LET'S GROW OUR FUTURE TOGETHER



# Agenda



- **Welcome and Introductions** (15 mins)
- **Project Progress Update** (20 mins)
- **Regional Housing Needs Assessment Draft Results** (50 minutes)
- **Next steps and action items** (3 mins)
- **Open forum and adjournment** (2 mins)



# Agreements



## Together We Know a Lot

We have something to learn from everyone in the room



## WAIT (Why Am/Aren't I Talking)

Actively participate and share your perspective with the group and be sure to create space for others to do the same



## Seek Commonality

We will disagree—which is okay—but will be guided by our shared commitment



## Don't Make Assumptions

Come to discussion with an open mind and ask clarifying questions to confirm understanding



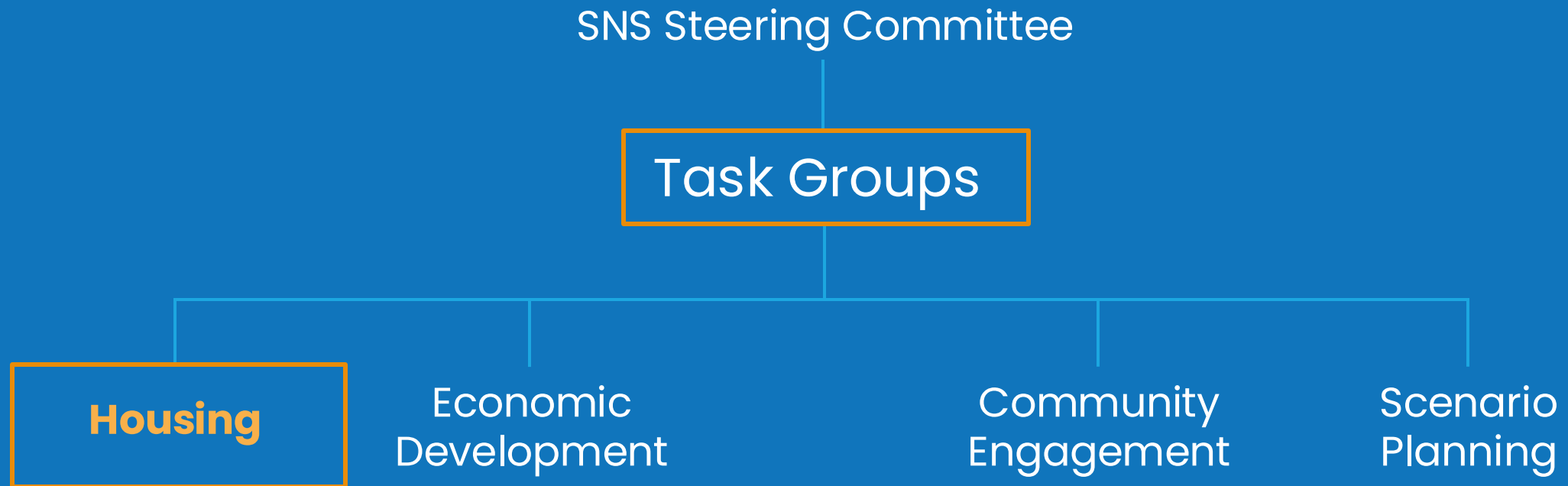
## Practice Holding Multiple Truths

All experiences are valuable and contribute to our shared understanding



# Role of the Housing Task Group

The **Housing Task Group** will help our team develop housing strategies and a regional plan for Southern Nevada.



Attend meetings every few months to provide input and review key deliverables related to housing tasks, along with policy development. Up to 5 Meetings.

# Re-Introductions & Housing Legislative Updates

## Re-introductions

Each person, please share:

- *Your Name*
- *Your Organization*
- *Your Role*



## Brief Legislative Update

Maurice Page, Nevada Housing Coalition



# Project Progress Update

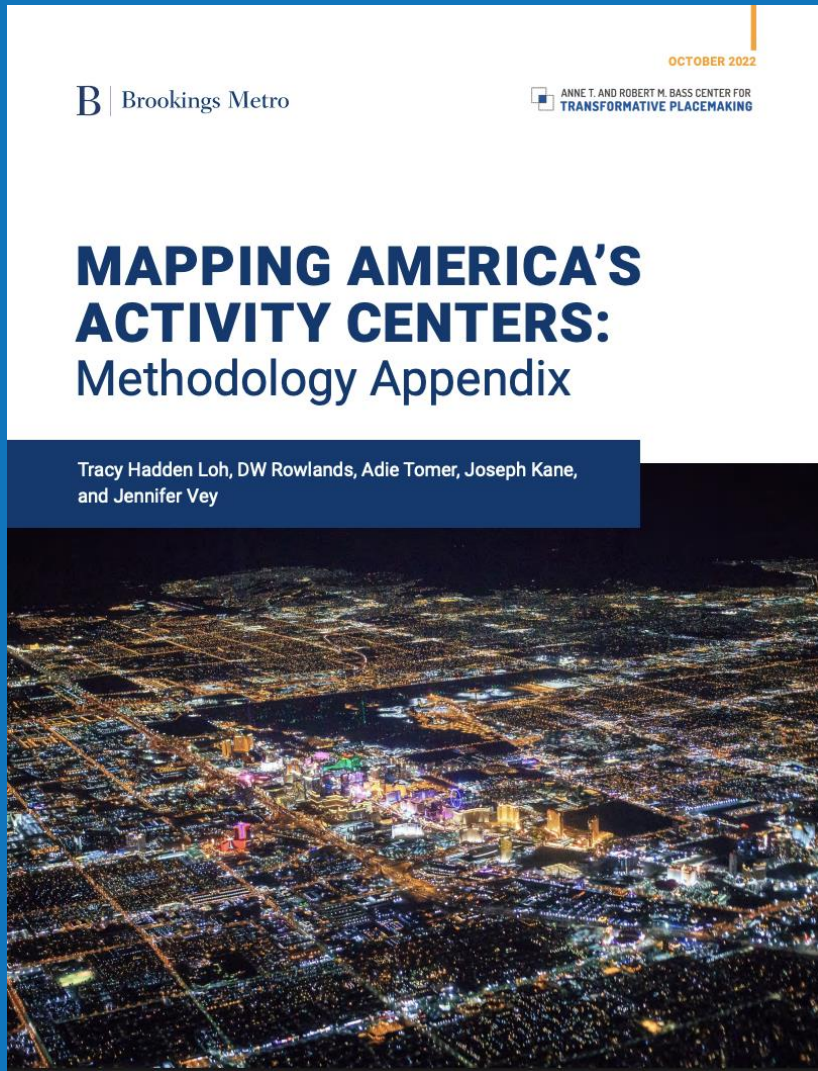
**1) Activity Centers Analysis**

**2) Scenario Planning**

**3) Housing Needs Assessment and Draft Housing Market Report**

**4) Summary of Housing SWOT Exercises**

# DRAFT Activity Centers Analysis



Identifying developed centers and emerging centers.

Evaluate areas of activity based on:

- Community assets
- Daily Needs
- Tourism
- Institutional

Understand areas that are functioning as complete communities today and where to prioritize development and incentives in the future and support local economic development

Will also be informed by engagement and survey results (web survey has interactive map0

# SCENARIO PLANNING PROCESS

**We're  
Here!**

**1**

**Data  
Acquisition**



**2**

**Baseline &  
Business-  
As-Usual  
Scenario**



**3**

**Create &  
Evaluate  
Future  
Scenarios**



**4**

**Create One  
or More  
Preferred  
Scenarios**



**5**

**Policy and  
Implement-  
ation Plan**



**PUBLIC ENGAGEMENT**

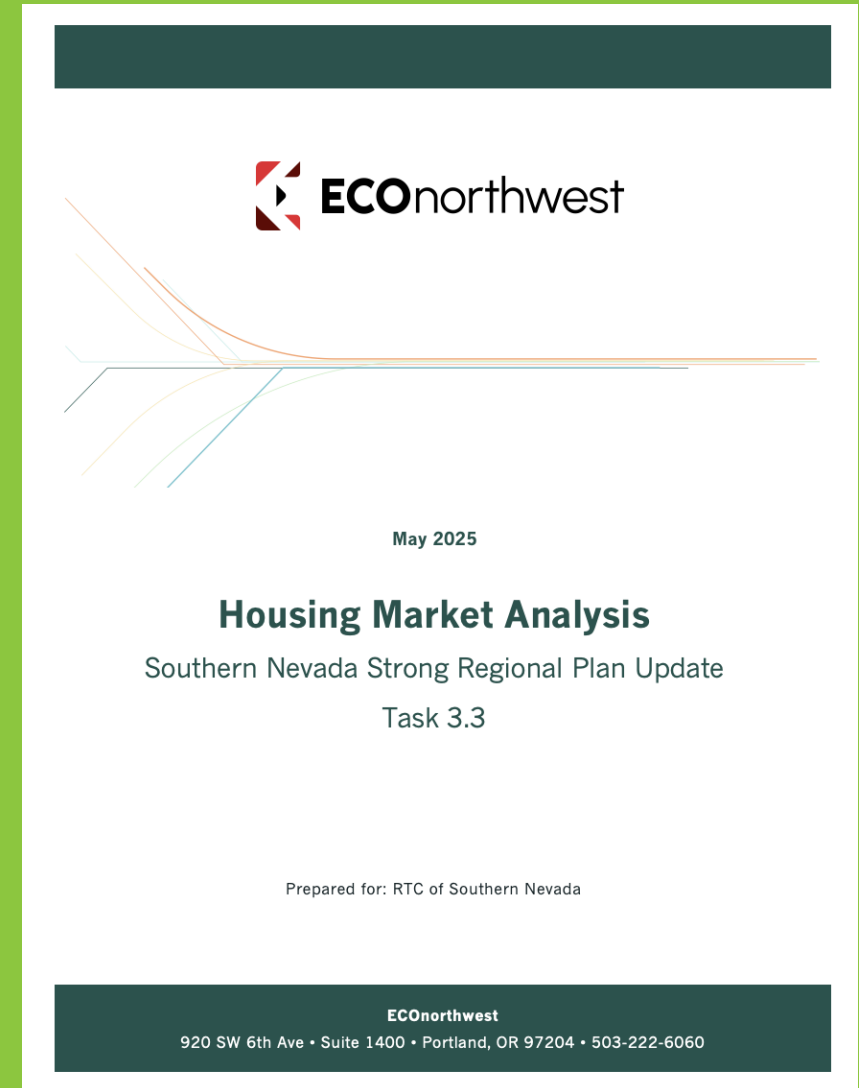
**Understand  
Values**

**Share  
Alternatives  
for Input**

**Evaluate  
Policies**

# Housing Market Report Update

- The region needs more housing at wider range of price points, **especially for lower income households**
- **The region needs more housing diversity** to better meet the needs of current residents, future residents, and respond to changing demographics
- **All communities across Southern Nevada** have housing needs across the income spectrum
- Around **445,000 new units are needed across the region by 2050**





# Summary of Housing SWOT Exercises

Strengths	Weaknesses
Availability of federally controlled land (with caveats)	Over-reliance on federal funding for affordable housing (e.g., LIHTC, HOME, vouchers)
Collaboration among jurisdictions	Shortage of vouchers and affordable housing preservation efforts
Institutional capacity in regional planning and housing programs	High cost and limited availability of land
	Disconnect between housing supply and development incentives

# Summary of Housing SWOT Exercises

## Opportunities

**Cross-sector partnerships between institutions and housing entities**

**Alignment between housing and economic development goals**

**Redevelopment of underutilized land**

**Housing Needs Assessments as tools to push back on NIMBY opposition**

## Threats

**Federal funding volatility (risk to vouchers and tax credits)**

**Land constraints and rising construction costs**

**Lack of a unified regional strategy to preserve and expand affordable stock**

# Questions so far?

# **Regional Housing Needs Assessment Overview**

- 1) Components of the Housing Market Analysis Report**
- 2) Regional Housing Needs Assessment Purpose and Method**
- 3) DRAFT Southern Nevada Regional Housing Needs Assessment Results**

# Components of the Housing Market Analysis Report

1. **Regional Growth and Demographic Trends**
2. **Housing Supply & Development**
3. **Housing Market Dynamics**
4. **Regional Housing Needs**
5. **Structural & Policy Barriers to Housing Stability**
6. **Implications for Regional Strategy**

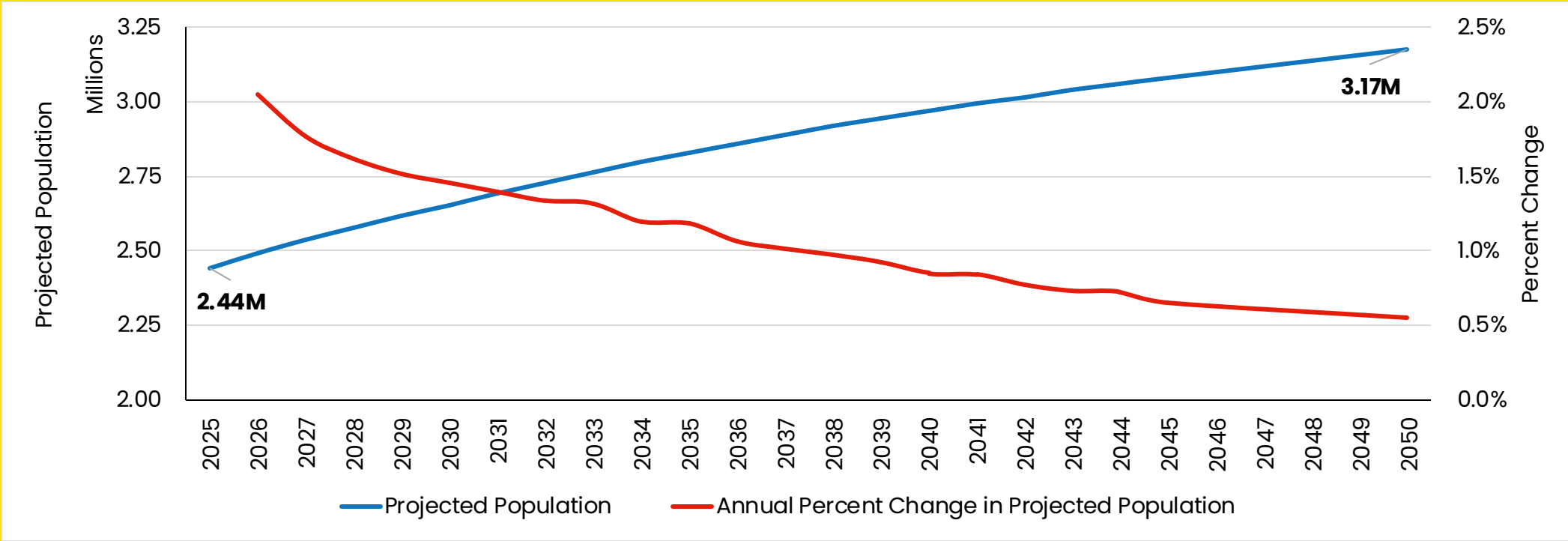


Source: Lennar

# Population Growth

Clark County's population is projected to **grow by 30%** in the next 25 years

Population Projections, Clark County, 2025 to 2050<sup>2</sup>



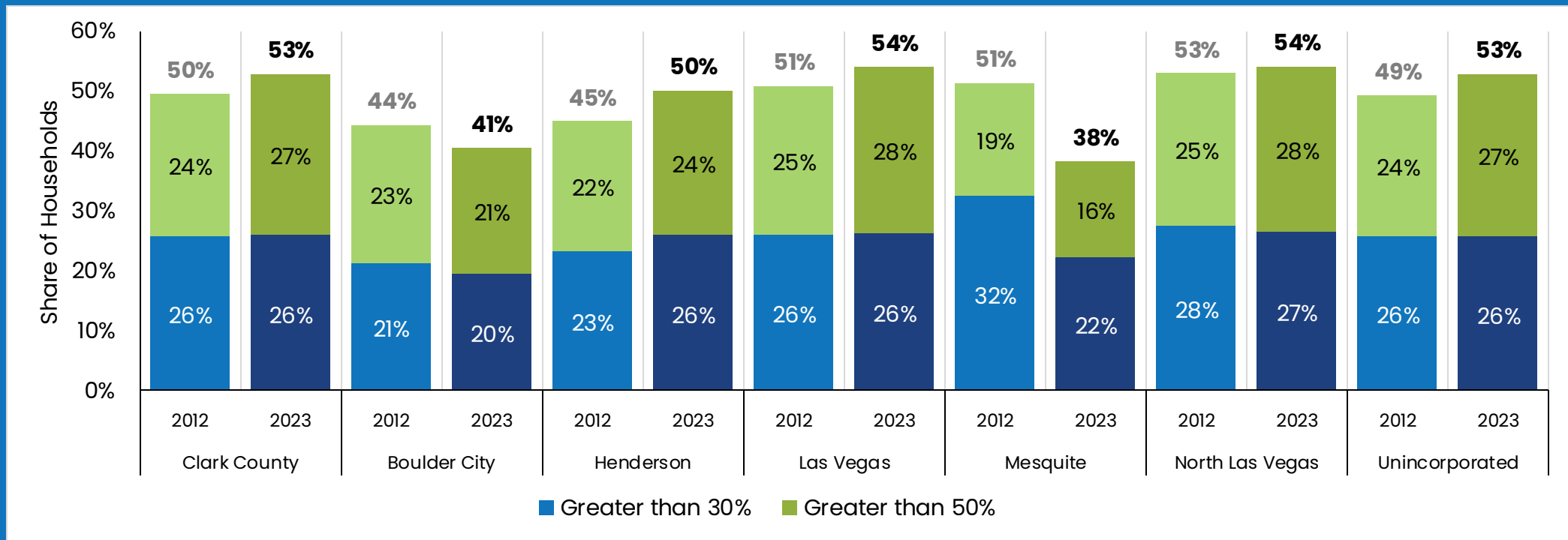
<sup>2</sup> University of Las Vegas 2024-2060 Population Forecasts, Prepared for Regional Transportation Commission of Southern Nevada  
Note: Projections are not available for 2046, 2047, 2048, and 2049



# Cost Burdening

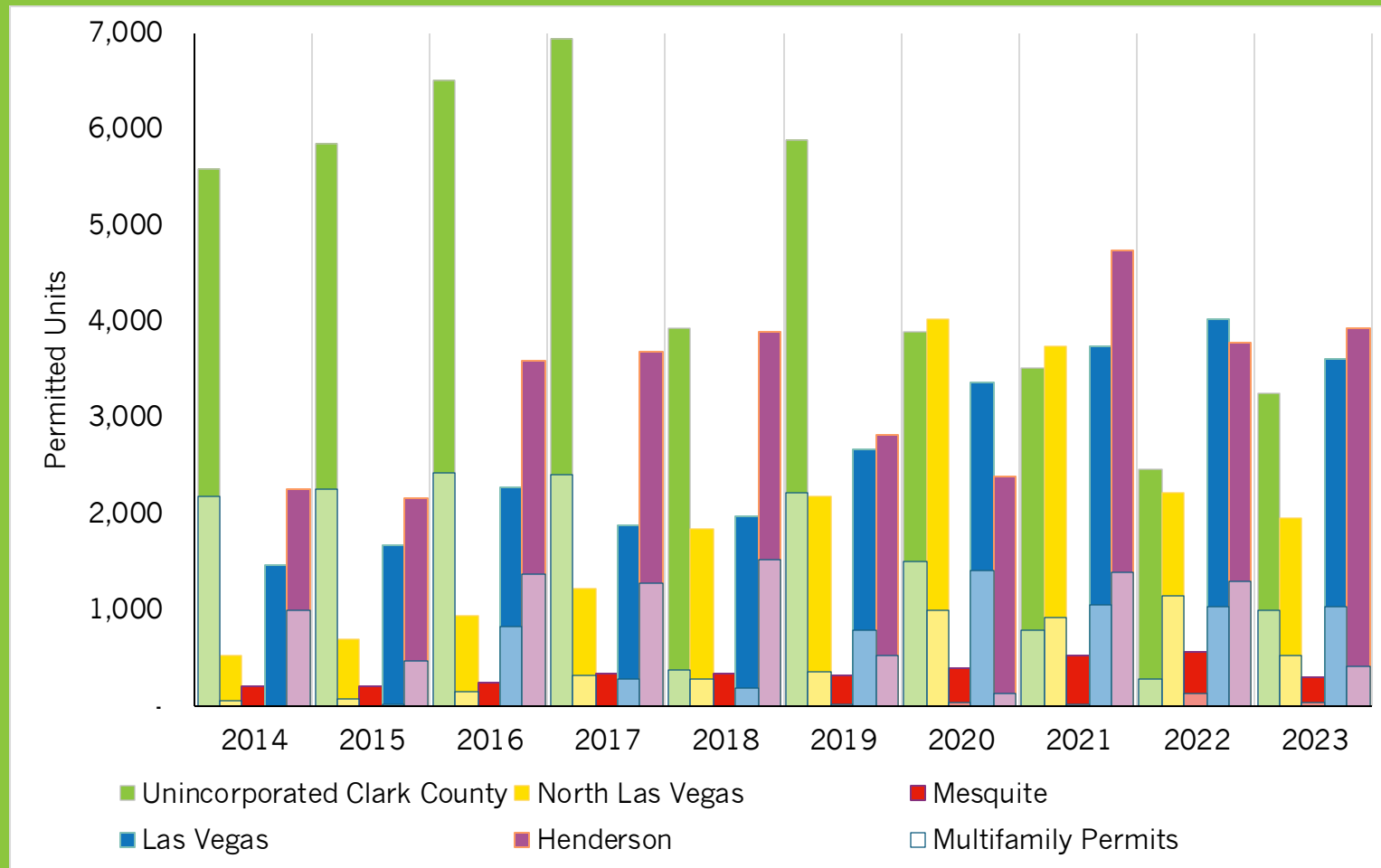
Roughly half of Clark County renters spend more than 30% of their income on housing costs.

## Renter Cost Burden Rates by Jurisdiction, 2012 – 2023



Source: American Community Survey 5-Year Data Tables, 2008–2012 and 2019–2023; HUD

# Housing Permitting Trends 2014 – 2023



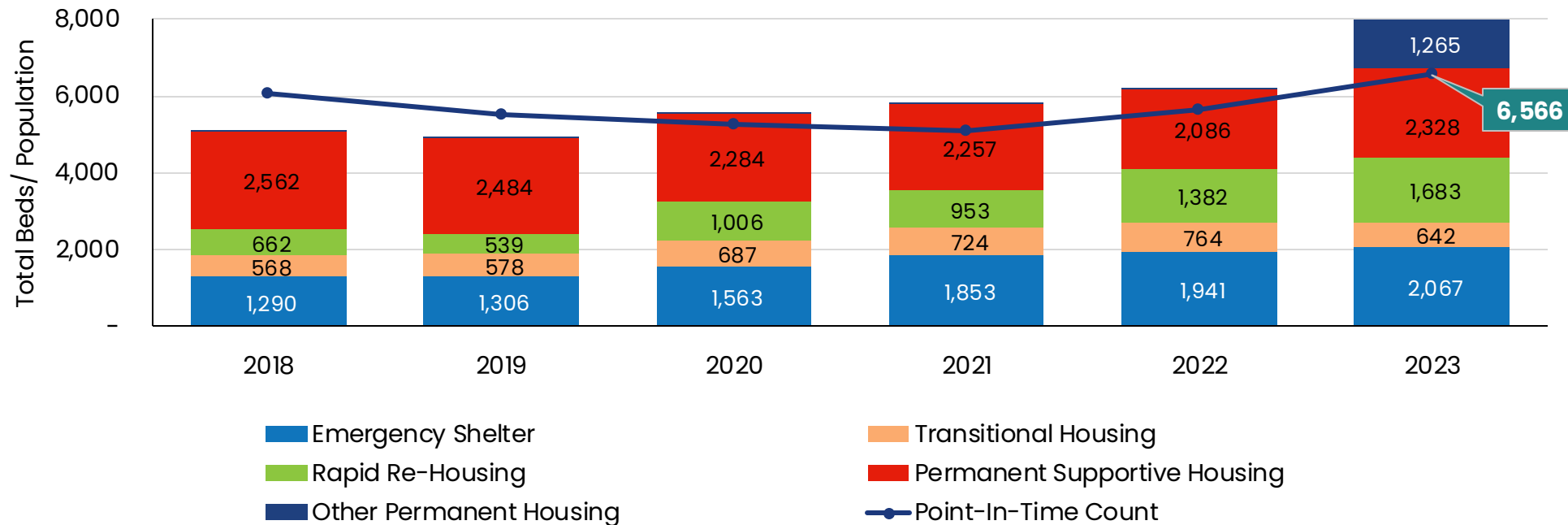
Source: Department of Housing and Urban Development, State of the Cities Data Systems

\* Note: Boulder City is not shown due to limited permits; from 2014 to 2013 the City issued 280 permits, an average of 28 per year. Over the time period, Boulder City did not issue any multifamily permits.

# Houselessness Trends

Clark County's unhoused population and programming is growing.

**Total Bed Count by Program and Point-in-Time Count for Southern Nevada Homelessness Continuum of Care, 2018–2023**



Source: American Community Survey 5-Year Data Tables, 2008–2012 and 2019–2023; HUD

# Purpose of a Regional Housing Needs Assessment

- Housing markets are regional
- Addressing regional issues requires regional partnerships.
- Provides insight into where the housing market is not working to better meet future needs.
- Complimentary to local efforts like AB213 reports.

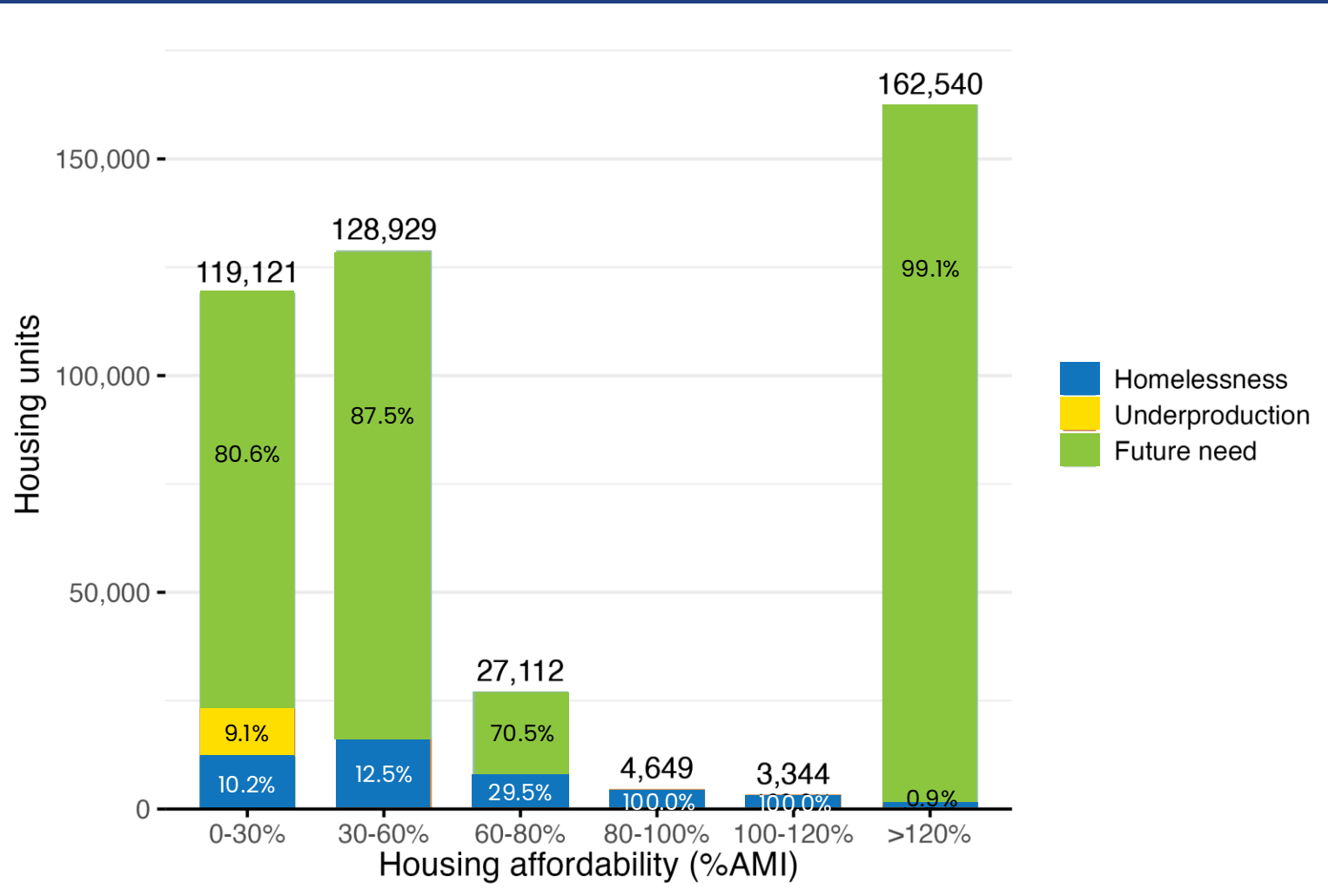
## **How are the AB213 Report and the Regional Housing Needs Assessment Complimentary?**

AB213 shortage analysis provides a good picture of where people are hurting today.

RHNA approach is an evaluation of how housing supply, price, and vacancy rates interact and how the market can respond over the 25-year planning period.

*Source: American Community Survey 5-Year Data Tables, 2008-2012 and 2019-2023; HUD*

# DRAFT Regional Housing Needs



Around **445,000** total new units needed by 2050

- Population growth: **388,993**
- Underproduction: **44,493**
- Homelessness: **12,209**

Source: UNLV, RTC, EConorthwest

# Components of Need

## Current Need

### UNDERPRODUCTION

Units that have not been produced to date in the region, but are needed to accommodate current population  
*(often referred to as housing shortage)*



### UNITS TO ADDRESS HOMELESSNESS

Units needed to house those who are currently experiencing homelessness





# Components of Need

**Future  
Need**

## PROJECTED NEED

Units needed to accommodate  
future population growth over  
27 years



# How Does Housing Production Impact Affordability?



## Elasticity

**What it is:** The relationship between supply and price, building more units delivers some broad-based price/rent reduction

**How we use it:** Every HNA assumes a target vacancy rate that balances policy goals with market/institutional capacity to build



## Filtering

**What it is:** Depreciation of older housing stock over time, the rate at which this happens is determined by the vacancy rate and the amount of demand relative to supply

**How we use it:** Using PUMS, model the decrease in rent/home value over 20-30 year runs

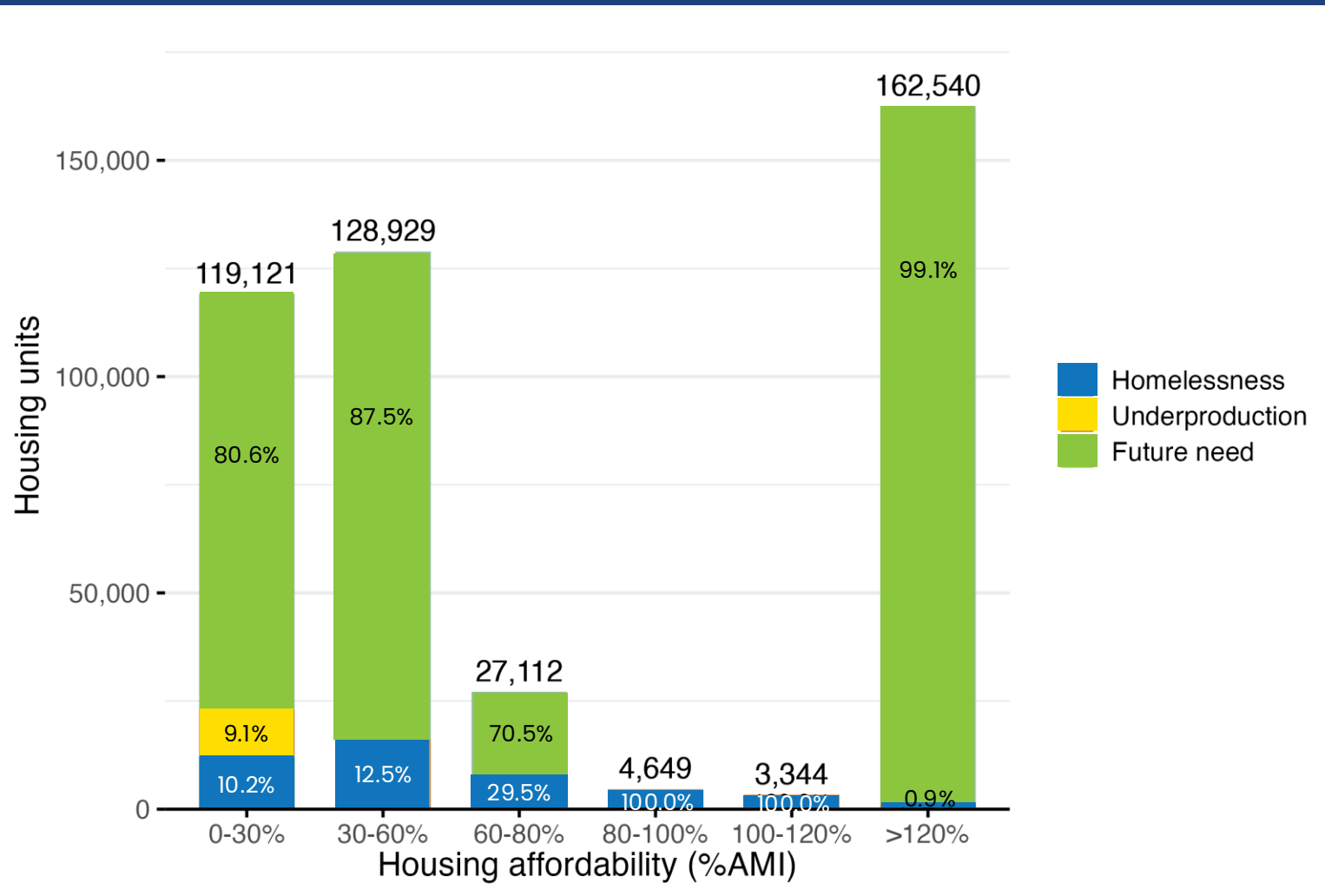


## Income Sorting/Mismatch

**What it is:** Households rarely spend exactly 30% of their income on housing, households that spend less crowd out lower income households, causing increased cost burdening -- the availability of units is a major contributor to lack of affordability

**How we use it:** Using PUMS, quantify the “gap” between households with X% AMI income and housing units affordable at X% AMI

# DRAFT Regional Housing Needs



Around **445,000** total new units needed by 2050

- Population growth: **388,993**
- Underproduction: **44,493**
- Houselessness: **12,209**

Source: UNLV, RTC, EConorthwest

# Regional Need by Jurisdiction

COMMUNITY	FUTURE NEED	HOUSELESSNESS NEED	UNDERPRODUCTION	TOTAL UNITS
Unic. Clark County	107,680	5,941	21,650	135,271
North Las Vegas	102,585	1,501	5,470	109,556
Henderson	97,241	1,275	4,647	103,163
Las Vegas	79,191	3,337	12,160	94,687
Mesquite	1,359	92	336	1,787
Boulder City	936	63	231	1,230
Total	388,993	12,209	44,493	445,695

Source: UNLV, RTC, EConorthwest

# Regional Need by Jurisdiction

COMMUNITY	0-30%	30-60%	60-80%	80-100%	100-120%	>120%	TOTAL
Unic. Clark County	37,816	39,077	9,183	2,262	1,627	45,305	135,271
North Las Vegas	28,165	31,728	6,024	571	411	42,657	109,556
Henderson	26,419	29,880	5,613	486	349	40,416	103,163
Las Vegas	25,860	27,373	6,077	1,270	914	33,193	94,687
Mesquite	510	516	127	35	25	574	1,787
Boulder City	351	355	87	24	17	395	1,230
Total	119,121	128,929	27,112	4,649	3,344	162,540	445,695

Source: UNLV, RTC, EConorthwest

# Discussion and Questions

We find there are housing needs across all income levels in every community.

Do our findings match your experience and understanding of needs in the area that you work in?

What findings resonate most? What is most surprising?



# Discussion – Drivers of Housing Outcomes

What factors will drive successful housing outcomes and what role might they play? Examples:

- Changing of population
- Age
- Wage/Jobs/Industries
- Household Composition
- Climate (Heat & Water Availability )
- Land (Availability & Entitlement)
- External Factors such as:
  - Material Costs & Labor
  - Federal Funding Availability

# Discussion – Evaluating Scenarios

What measures of success might we use to evaluate housing outcomes across scenarios?

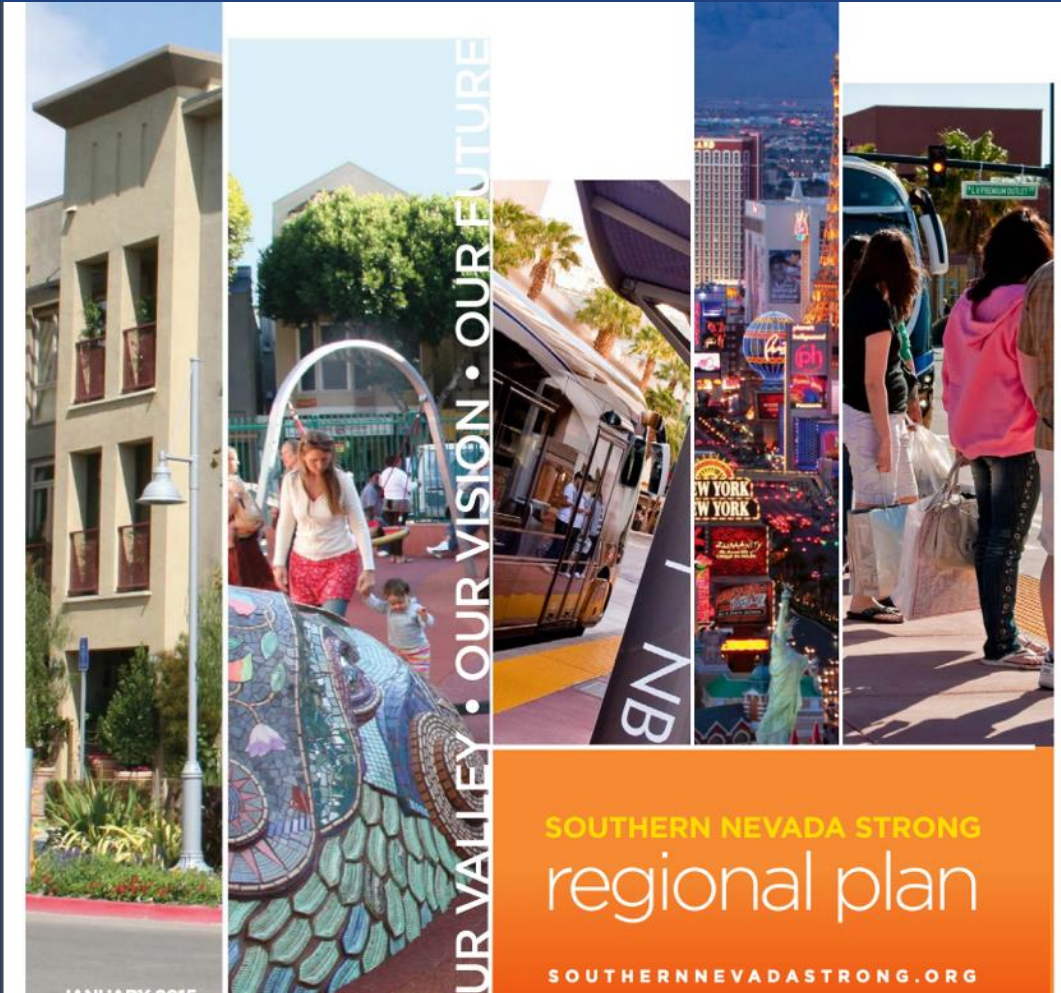
AB 213 requires some already:

- Land available for housing, both vacant and underutilized
- Total housing production by type and tenure
- Housing production by AMI

Other examples:

- Green house gas emissions
- Commute times
- Growth in centers (more complete communities)
- Greater housing diversity

# Next Steps



- Review the Housing Market Analysis Draft Report
- Begin to create scenarios to explore housing strategies
- Review Activity Centers Analysis
- Review Scenario Planning progress
- Broader community outreach and engagement
  - Regionwide pop-ups
  - Phase 1 Survey



An aerial photograph of a desert city, likely Las Vegas, showing a dense residential area with many palm trees and houses. In the background, there are large, rugged mountains under a clear sky.

# Thank you!

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