

Hays Housing Needs Study 2021

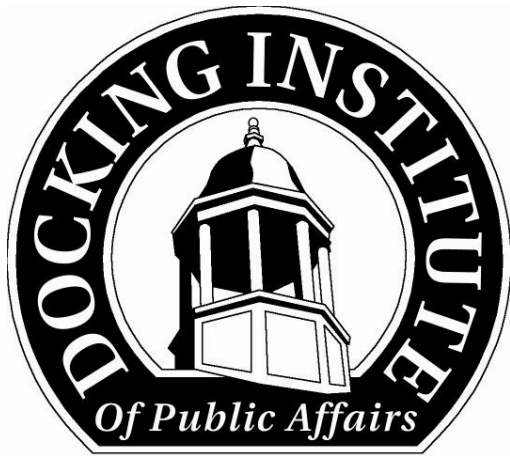
**Fort Hays State University
600 Park Street
Hays, Kansas**

September 2021

Prepared For
City of Hays, Kansas

By

**The Docking Institute of Public Affairs
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Mission:

To Facilitate Effective Public Policy Decision-Making.

The staff of the Docking Institute of Public Affairs and its University Center for Survey Research are dedicated to serving the people of Kansas and surrounding states.

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Executive Summary

The Docking Institute of Public Affairs was contracted by the City of Hays to conduct a housing needs analysis for the purpose of documenting the availability of affordable housing for its current and future work force, facilitating the broader goal of promoting economic development in the region. The analysis found the following:

- The Hays housing market is characterized by 1) a high proportion (40.9%) of older housing units built prior to 1970, suggesting a strong need for new housing units; 2) a low proportion (2.1%) of housing units built recently (2014-2019), suggesting that relatively few new housing units are being built in the previous year, most likely lower than the threshold of at least 1.5% of stock or less being 1 year old; and 3) high housing costs relative to the comparison communities in Western Kansas, especially for lower-income households.
- The U.S. Census shows that Hays had a 2.95% population increase from 2000 to 2020. Although Hays has experienced a net gain in housing, that net gain, as well as planned construction for new housing, has been declining in general since 2013, at a time when Hays population is increasing.
- U.S. Census population trends project continued population growth in Ellis County through 2060, while all eight of its contiguous counties will experience declines in population, suggesting heavy migration into Hays and a high demand for additional housing.
- Assuming a 0.25% annual population growth rate, Hays would require 23 new owner-occupied units per year over the next 10 years (2022-2031,) 21 new renter-occupied units per year over the next 5 years (2022-2026), and 22 new renter-occupied units per year from 2027 to 2031.
- Assuming a 0.5% annual population growth rate, Hays would require 35 new owner-occupied units and 32 new renter-occupied units per year from 2022 to 2026, and 37 new owner-occupied units and 33 new renter-occupied units per year from 2027 to 2031.
- Assuming a 1.0% annual population growth rate, Hays would require 61 new owner-occupied units and 54 new renter-occupied units per year from 2022 to 2026, and 65 new owner-occupied units and 57 new renter-occupied units per year from 2027 to 2031.
- 40.9% of housing units in Hays (3,977 units) were constructed at least 50 years ago, making many highly likely to be suitable for rehabilitation. However, an average of only 44 permits per year for rehabilitation have been issued over the past 5 years, suggesting that additional incentives are required to maintain the quality of the older housing units in Hays.
- Comparative analysis showed housing costs in Hays and the percentage of their income Hays residents pay for housing to be among the highest in western Kansas, suggesting a high demand to supply ratio and a need to increase the supply of housing in order to bring housing costs back down and closer to that of comparison communities.

- In 2019, the Kansas Department of Labor estimated over 15,000 jobs in Ellis County, rivaling that of its sister counties with larger populations and indicating that Hays has one of the largest labor forces in Western Kansas.
- Hays offers a wide variety of educational, recreational, and cultural amenities conducive to attracting new employers and high-quality labor. It also offers a wide range of business support services necessary. The availability of affordable, high-quality housing is one of the few obstacles to economic growth and development in Hays.

Research Objectives and Methods

The City of Hays contracted with the Docking Institute of Public Affairs (Docking Institute) at Fort Hays State University to conduct a housing needs study. Following the guidelines provided by the Kansas Rural Housing Incentive District Act (Act), the Docking Institute collected data from the U.S. Census Bureau, state government sources and official records maintained by the City of Hays. These data were analyzed to assess the City's current and future supply of and demand for housing, any inadequacies in the supply of housing that may exist, and the importance of quality housing for the economic growth of the City. To facilitate review, the format of the report mirrors that of the Act guidelines published by the Kansas Department of Commerce.

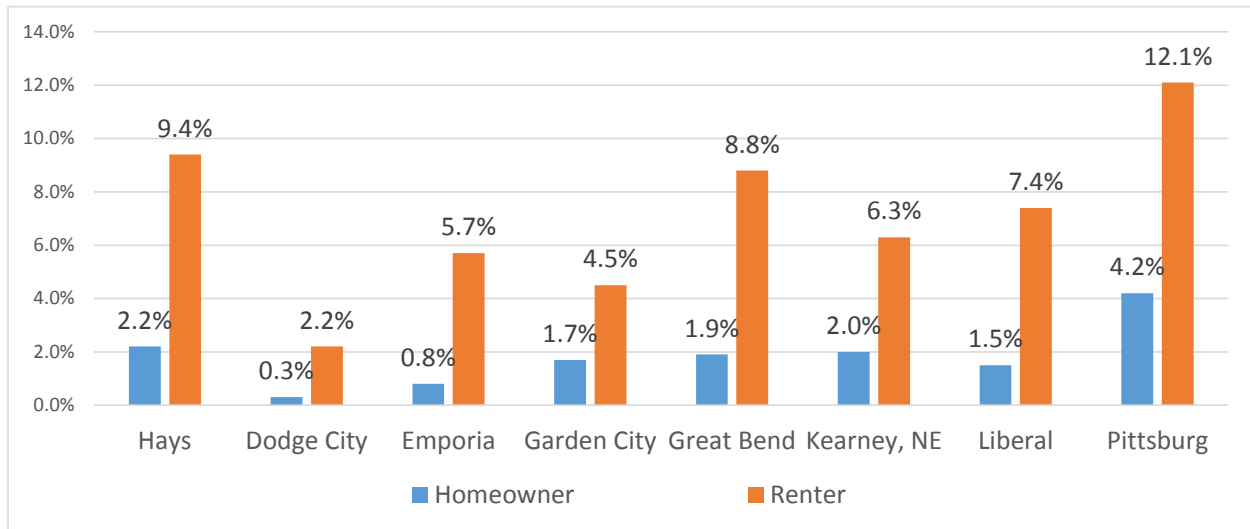
I. Quality of Housing: “There is a shortage of quality housing of various price ranges in the city or county despite the best efforts of public and private housing developers”

The first guideline provided by the Act asks if there is a shortage of quality housing of various price ranges. “Quality housing” is assessed through aggregated measures on a variety of factors, such as physical defects (for example lacking complete kitchen or plumbing), overcrowded units, excessive cost burden, and age of the houses. Table 1 shows the indicators and thresholds specified in the guidelines to define a shortage of quality housing. The following sub-sections examine the housing conditions in Hays in regards to those indicators in order to determine the degree to which a housing shortage exists. Also, in order to understand how the housing conditions in Hays fare relative to Western Kansas, four other demographically similar cities (Dodge City, Garden City, Great Bend, and Liberal) in the region are selected as comparison cities. For a few indicators that are related to rental units, three cities in the region with a major university are added for comparison, too: Emporia and Pittsburg in Kansas and Kearney in Nebraska.

Table 1: Housing Shortage Indicators/Criteria

Housing Supply/Demand Indicators	Housing Shortage Criteria
Vacancy Rate	Low (1% of stock or less for owner-occupied units; under 5% of stock for rental units)
Overcrowding	High (6% of stock or more for owner-occupied units)
Size Match	Count of large households (6 or more persons) exceeds count of large units (4 or more bedrooms)
Complete Plumbing	Low (96% of stock or less for owner-occupied units; 95% of stock or less for rental units)
New Units (1 year old or less)	Low (1.5% of stock or less for owner-occupied units; 1% of stock or less for rental units)
Old Units (50 years old or more)	High (40% of stock or more for owner-occupied units; 40% of stock or more for rental units)
Price: Income Match	Count of households in income category exceeds count of units in price/rent category (units not to exceed 30% of gross income)

Figure 1: Vacancy Rate: 2019



Source: U.S. Census, 2015-2019 American Community Survey

Vacancy Rate

The vacancy rates in Hays and the comparison communities are shown in Figure 1. In 2019, 2.2% of the owner-occupied housing units in Hays were vacant, and 9.4% of the rental units were vacant. These rates were both higher than the shortage thresholds set in the guidelines, 1% and 5%, respectively. Vacancy data were obtained from the American Community Survey conducted by the U.S. Census Bureau. Such survey data were based on a sample and thus were subject to sampling variability, which is measured by a margin of error. For instance, the margin of error for the rental vacancy rate in Hays in 2019 was +/-4.4% at the 90% confidence level, which means there is a 90% probability that the interval of 5% to 13.8% contains the true rental vacancy rate that would be found if all rental units were surveyed in Hays.

Overcrowding/Size Match

As Table 2 shows, 48.1% of the owner-occupied housing units in Hays had 4 or more bedrooms in 2019, and 20.4% of households that lived in the owner-occupied housing units had 4 persons or more in the household. The percentage of owner-occupied housing units with 2 or 3 bedrooms (51.4%) was below that of households with 2 or 3 persons (57.1%); however such shortage can be filled with the ample units with 4 or more bedrooms. As a result, in 100% of households that lived in the owner-occupied housing units, 1 or less person occupied one room, on average. The comparison cities all had higher percentages of households with more than 1 occupants per room. So Hays does not appear to have an overcrowding issue, and the sizes of housing units adequately house the distribution of household sizes for owner-occupied housing units.

A similar situation is observed in the renter-occupied housing units (Table 3). In 2019, 99% of the households who rented in Hays had 1 or less occupants per room. The percentages of rental properties with less than 1 occupant per room is lower in all of the comparison cities.

Table 2: Size Match, Owner-occupied: 2019

	Hays	Dodge City	Garden City	Great Bend	Liberal
Occupied housing units	4,665	5,233	5,550	3,887	4,291
HOUSEHOLD SIZE					
1-person household	22.5%	17.3%	24.1%	27.1%	18.1%
2-person household	39.3%	31.3%	30.8%	42.7%	28.2%
3-person household	17.8%	13.6%	13.2%	10.8%	18.2%
4-or-more-person household	20.4%	37.7%	31.8%	19.4%	35.5%
BEDROOMS					
No bedroom	0.0%	0.3%	0.8%	0.0%	0.7%
1 bedroom	0.5%	1.3%	0.8%	2.9%	1.3%
2 or 3 bedrooms	51.4%	71.0%	60.3%	69.7%	71.4%
4 or more bedrooms	48.1%	27.4%	38.1%	27.4%	26.6%
OCCUPANTS PER ROOM					
1.00 or less occupants per room	100.0%	94.0%	96.6%	97.6%	97.3%
1.01 to 1.50 occupants per room	0.0%	5.3%	2.6%	2.4%	2.2%
1.51 or more occupants per room	0.0%	0.7%	0.8%	0.0%	0.5%

Source: U.S. Census, 2015-2019 American Community Survey

Table 3: Size Match, Renter-occupied: 2019

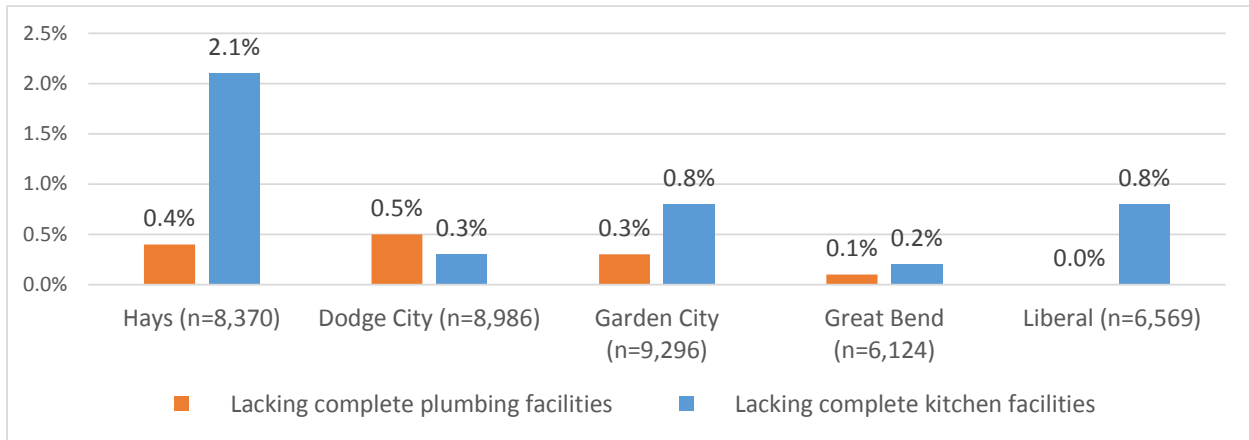
	Hays	Dodge City	Garden City	Great Bend	Liberal
Occupied housing units	3,705	3,753	3,746	2,255	2,278
HOUSEHOLD SIZE					
1-person household	51.1%	29.4%	32.5%	44.1%	35.9%
2-person household	27.3%	21.6%	18.5%	24.3%	19.7%
3-person household	11.7%	21.1%	15.9%	12.3%	24.9%
4-or-more-person household	10.0%	28.0%	33.1%	19.2%	19.6%
BEDROOMS					
No bedroom	2.3%	1.3%	1.8%	2.1%	5.4%
1 bedroom	21.6%	16.7%	19.7%	24.2%	20.0%
2 or 3 bedrooms	60.8%	77.1%	69.2%	64.7%	67.7%
4 or more bedrooms	15.3%	4.8%	9.3%	9.0%	6.8%
OCCUPANTS PER ROOM					
1.00 or less occupants per room	99.0%	92.8%	86.7%	98.4%	92.3%
1.01 to 1.50 occupants per room	0.2%	5.6%	10.7%	0.5%	6.6%
1.51 or more occupants per room	0.8%	1.6%	2.6%	1.1%	1.1%

Source: U.S. Census, 2015-2019 American Community Survey

Complete Plumbing

In Hays, 0.4% of housing units lacked completed plumbing facilities and 2.1% lacked complete kitchen facilities (Figure 2). None of the comparison communities met the 4% criterion for owner-occupied units or 5% criterion for rental units, suggesting that the more urbanized communities in Western Kansas tend to be more modernized and the housing more likely to have complete plumbing. However, 2.1% of housing units in Hays lacked complete kitchen facilities, which was much higher than all the comparison communities.

Figure 2: Deficiency of Plumbing and Kitchen Facilities: 2019



Source: U.S. Census, 2015-2019 American Community Survey

New Units (One year old or less)

Table 4 shows that only 2.1% of the housing units were built between 2014 and 2019. Although the American Community Survey data do not show the number of housing units being 1 year old or less, it is highly likely that the percentage of housing units 1 year old or less was lower than the threshold in the Act guideline of 1.5% of stock or less being 1 year old or less, which would suggest a strong need for new housing units in Hays.

Table 4: Age of Housing

	Hays	Dodge City	Garden City	Great Bend	Liberal
Total Housing Units	9,724	9,477	9,910	7,277	7,340
2014 to 2019	2.1%	1.1%	1.1%	1.1%	2.6%
2010 to 2013	2.2%	3.6%	2.1%	0.8%	0.2%
2000 to 2009	7.6%	3.2%	6.4%	3.0%	3.8%
1990 to 1999	8.9%	10.3%	12.4%	6.9%	7.5%
1980 to 1989	13.6%	8.5%	16.0%	6.5%	9.7%
1970 to 1979	24.7%	23.1%	25.2%	17.4%	22.9%
1960 to 1969	13.7%	12.9%	13.7%	10.9%	20.3%
1950 to 1959	13.2%	16.2%	8.8%	23.2%	19.1%
1940 to 1949	5.8%	9.2%	6.7%	10.4%	7.0%
1939 or earlier	8.2%	11.9%	7.5%	19.8%	6.9%

Source: U.S. Census, 2015-2019 American Community Survey

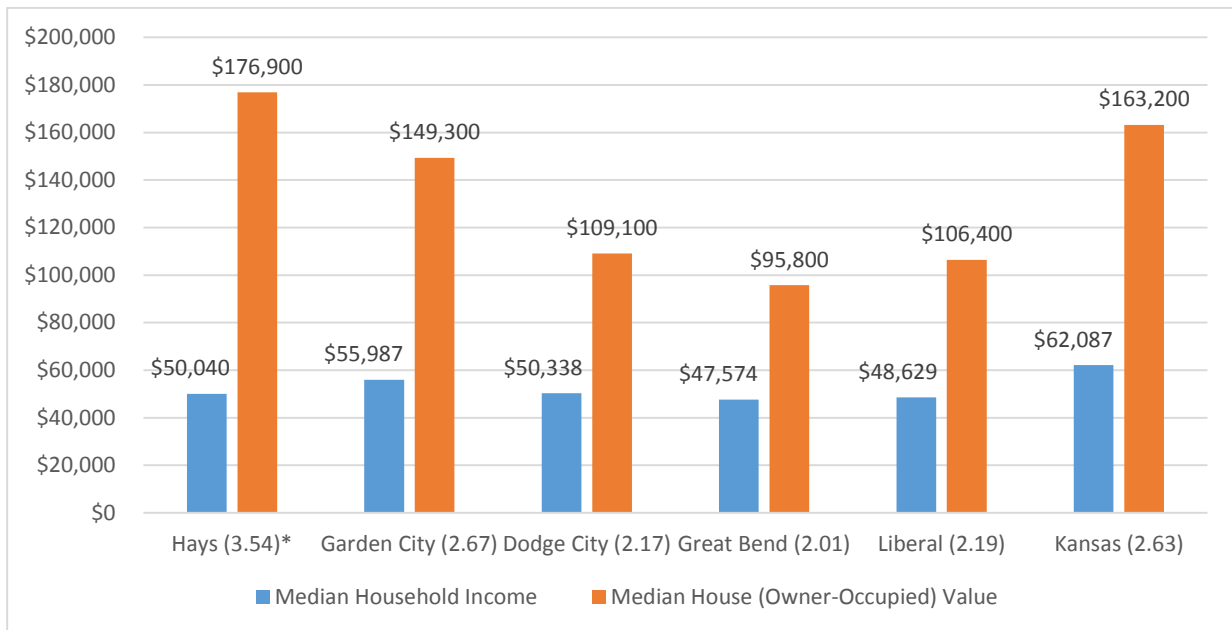
Old Units (50 years old or more)

In Hays, 41% of the housing units are 51 years old or more (built before 1970), as shown in Table 4. In the Act, it is considered high when 40% of the housing stock is 50 years old or more. So Hays does have an unusually high proportion of older housing units, suggesting a strong need for renovation and reconstruction.

Price: Income Match

Housing costs in Hays are much higher than the state average and in comparison cities. In 2019, the median household income in Hays was \$50,040, and the median value of owner-occupied housing units was \$176,900, yielding a value/income ratio of 3.54 (Figure 3). The second highest ratio was in Garden City, which was 2.67, only three-fourths of the ratio in Hays. These results suggest that residents of Hays, compared to their peer cities, are under considerable financial strain due to the relatively higher cost of their housing, providing one of the strongest arguments for supplemental funding. This suggests that incentives targeted at increasing the supply of housing in Hays would provide much-needed relief for low-income residents with less discretionary incomes.

Figure 3: House Value vs. Income, Owner-occupied: 2019



*The value in the parenthesis is the value/income ratio

Source: U.S. Census, 2015-2019 American Community Survey

Table 5 shows the monthly housing costs in 2019. The median monthly housing cost in Hays was \$775, which was lower than those in comparison cities except for Great Bend. However, more Hays residents appeared to pay higher costs than residents in all other comparison communities. The table shows that 32.5% of households in Hays paid \$1,000 or more per month for housing. All comparison cities other than Garden City had a lower percentage of people paying \$1,000 or more per month (39.3% in Garden City, 31.4% in Dodge City, 31% in Liberal, and 20.1% in Great Bend).

Table 5: Monthly Housing Costs: 2019

	Hays	Dodge City	Garden City	Great Bend	Liberal	Kansas
Less than \$500	19.9%	20.2%	15.6%	32.0%	20.7%	17.8%
\$500 to \$999	43.6%	47.6%	44.0%	46.8%	46.9%	37.9%
\$1,000 to \$1,999	29.0%	27.5%	34.7%	18.8%	27.6%	33.3%
\$2,000 to \$2,999	2.7%	3.7%	4.0%	1.1%	1.3%	7.0%
\$3,000 or more	0.8%	0.2%	0.6%	0.2%	2.2%	2.3%
No cash rent	3.8%	0.8%	1.1%	1.2%	1.4%	1.7%
Median (dollars)	775	798	873	656	796	902

Source: U.S. Census, 2015-2019 American Community Survey

Table 6 shows the monthly housing costs by household income in 2019. Among those households in Hays making less than \$20,000 a year, 81.9% paid 30% or more of their income toward housing, which was lower than that in Garden City (84.5%), but higher than those in other comparison cities. Hays also had the second highest percentage of households making \$35,000 to \$29,999 a year paying 30% or more of household income toward housing. About half (49.6%) of households in Hays making \$20,000 to \$34,999 a year paid 30% of their income toward housing, which ranked the third among all communities under study. Although housing costs command a large proportion of all of Hays' residents' family budgets, the percentages of low-income families paying high housing costs are particularly high, suggesting a strong need for government assistance in providing affordable housing for low income families.

Table 6: Monthly Housing Costs as a Percentage of Household Income in the Past 12 Months: 2019

	Hays	Dodge City	Garden City	Great Bend	Liberal	Kansas
Household income less than \$20,000						
Less than 20% of household income	5.7%	2.2%	6.0%	5.1%	5.3%	5.8%
20 to 29% of household income	12.4%	23.1%	9.5%	18.9%	18.9%	12.4%
30% or more of household income	81.9%	74.6%	84.5%	76.0%	76.5%	81.8%
Household income \$20,000 to \$34,999						
Less than 20% of household income	16.0%	23.0%	16.0%	33.3%	21.2%	21.3%
20 to 29% of household income	34.4%	28.3%	26.1%	29.3%	19.0%	25.2%
30% or more of household income	49.6%	48.7%	58.8%	37.4%	59.8%	53.5%
Household income \$35,000 to \$49,999						
Less than 20% of household income	28.0%	38.7%	36.0%	43.6%	43.4%	40.5%
20 to 29% of household income	43.2%	44.8%	31.5%	44.2%	39.4%	35.1%
30% or more of household income	29.6%	16.5%	32.6%	12.9%	17.1%	25.2%
Household income \$50,000 to \$74,999						
Less than 20% of household income	61.8%	57.9%	59.4%	77.9%	71.0%	56.0%
20 to 29% of household income	32.5%	33.9%	21.3%	14.0%	19.6%	31.4%
30% or more of household income	6.4%	8.1%	19.8%	8.1%	8.9%	12.0%
Household income \$75,000 or more						
Less than 20% of household income	78.6%	90.0%	87.7%	91.2%	77.4%	82.7%
20 to 29% of household income	19.6%	8.2%	11.2%	8.8%	20.7%	14.6%
30% or more of household income	1.8%	1.8%	1.1%	0.0%	1.9%	2.7%

Source: U.S. Census, 2015-2019 American Community Survey

Table 7 and Table 8 present the monthly costs for homeowners and renters, respectively. Among Hays homeowners who had a mortgage on their house, 18.2% spent 30% or more of their household income on housing, which was lower than in the other comparison communities. However, 14.8% of Hays homeowners without a mortgage spent 30% or more on housing, the highest among all the cities under examination (Table 7). This is congruent with previous results showing a high proportion of older housing units in Hays, which will tend to have higher maintenance costs.

Table 7: Monthly Owner Cost as a Percentage of Household Income: 2019

	Hays	Dodge City	Garden City	Great Bend	Liberal	Kansas
Housing units with a mortgage	2,702	2,860	3,218	1,861	2,092	437,329
Less than 20.0 percent	52.4%	44.0%	50.1%	49.1%	31.4%	54.5%
20.0 to 29.9 percent	29.5%	31.3%	21.9%	25.3%	35.3%	26.1%
30.0 percent or more	18.2%	24.6%	27.9%	25.6%	33.3%	19.4%
Housing unit without a mortgage	1,920	2,362	2,255	2,003	2,093	315,553
Less than 20.0 percent	71.5%	77.9%	78.4%	83.3%	78.2%	79.1%
20.0 to 29.9 percent	13.8%	16.6%	10.8%	11.3%	10.9%	11.0%
30.0 percent or more	14.8%	5.5%	10.7%	5.3%	10.9%	9.9%

Source: U.S. Census, 2015-2019 American Community Survey

Hays renters paid a much higher percentage of their income on housing than renters in all of comparison cities except for Pittsburg and Emporia. In 2019, almost half (48.8%) of renters in Hays spent 30% or more of their household income on rent, whereas only about one-third of renters in those cities without a university spent 30% or more of their household income on rent (Table 8). Even among those cities with a university, Hays had a higher percentage of renters paying 30% or more of their household income for rent than Kearney. These results strongly suggest that most of Hays residents are paying a higher proportion of their incomes on housing costs. Government-assisted housing would provide relief for families whose housing costs are straining their budgets and perhaps causing them to forego other necessities.

Table 8: Gross Rent as a Percentage of Household Income: 2019

	Hays	Dodge City	Emporia	Garden City	Great Bend	Kearney, NE	Liberal	Pittsburg
Occupied units paying rent	3,385	3,608	4,577	3,605	2,144	5,049	2,160	4,369
Less than 20.0 percent	22.9%	37.0%	28.7%	42.4%	34.4%	27.9%	39.6%	23.1%
20.0 to 29.9 percent	28.3%	29.0%	20.8%	19.9%	26.1%	26.3%	23.5%	20.0%
30.0 percent or more	48.8%	34.0%	50.5%	37.7%	39.5%	45.8%	36.8%	56.9%

Source: U.S. Census, 2015-2019 American Community Survey

Assuming homebuyers would view a house with a value twice as high as their annual household income as affordable, and renters could afford to spend 24% of annual household income on rent, Table 9 matches households in different income categories with the affordable housing units in Hays. In 2019, 2,302 households in Hays earned less than \$25,000. A total of 1,246 housing units were affordable for these households, including 214 owner-occupied housing unit (valued \$50,000 or less) and 1,032 rental units (rented for \$500 or less per month). The discrepancy means that 1,056 households had to buy a house with a value more than twice their household income or pay a rent 25% or higher of their household income. Although there was a surplus of affordable units in the higher income categories, the large demand from the lowest income category would have forced a great number of households in higher income categories to spend beyond the affordability level. Data from the City of Hays Planning, Inspection, Enforcement Division show that only 63 “income based” or “qualified housing” units were built in Hays between 2000 and 2020, meeting only 6% of the estimated current need for households earning less than \$25,000.

Table 9: Income Distribution and Housing Affordability in Hays: 2019

Income Range	% of City Median Household Income	% of Households	Number of Households	Affordable Range for Owner Units	Number of Owner Units	Affordable Range of Renter Units	Number of Renter Units	Total Affordable Units	Balance
Less than \$25,000	less than 50%	27.60%	2,302	\$0-50,000	214	\$0-500	1,032	1,246	-1,056
\$25,000 - 49,999	50-100%	22%	1,880	\$50,000-99,999	464	\$500-999	2,110	2,574	694
\$50,000 - 74,999	100-150%	16.60%	1,392	\$100,000-149,999	869	\$1,000-1,499	499	1,368	-24
\$75,000 - 99,999	150-200%	12.60%	1,054	\$150,000-199,999	1340	\$1,500-1,999	61	1,401	347
\$100,000 - 149,999	200-300%	14.70%	1,233	\$200,000-299,999	1314	\$2,000-\$3,000	3	1,317	84
\$150,000 or more	Over 300%	6.10%	509	\$300,000 or more	464	\$3,000 or more	0	464	-45

Source: U.S. Census, 2015-2019 American Community Survey

Housing Demand and Supply Forecast

Besides the current housing conditions, the guidelines in the Act suggest a housing needs study may conduct “beyond-the-present” analyses that make projections of population, as well as housing supply and demand changes. Since 1960, Hays experienced the fastest population growth in the 1960s (growing 2.57% annually) and the slowest growth in the 2000s (growing 0.25% annually). The annual growth rate increased to 0.29% in the 2010s. The annual growth rate from 1960 to 2020 was 0.95% (Table 10). Based on the growth rates since 1960, Table 11 presents the population forecast under three scenarios. With an annual growth rate of 0.25%, Hays population would increase to 21,435 in 2026 and 21,704 in 2031. With an annual growth rate of 0.5%, Hays population would reach 21,757 in 2026; and the population would reach 22,415 in 2026 with the annual growth rate of 1%. These data suggest that Hays will have at least 266 additional residents needing housing within the next 5 years with an annual growth rate of 0.25%, and could have as many as 1,088 additional residents by 2026 with a 1% annual growth rate.

Table 10: Population Change in Hays: 1960-2020

	Population at Decade's End	Decennial Population Change	% Growth during Decade	Annual Growth Rate
1960	11,947			
1960-1970	15,396	3,449	28.87%	2.57%
1970-1980	16,301	905	5.88%	0.57%
1980-1990	17,814	1,513	9.28%	0.89%
1990-2000	20,013	2,199	12.34%	1.17%
2000-2010	20,510	497	2.48%	0.25%
2010-2020	21,116	606	2.95%	0.29%
1960-2020		9,169	76.75%	0.95%

Source: U.S. Census

Table 11: Population Forecast: 2019-2031

	2020 Census, baseline	2021	2026	2031
0.25% Annual Growth Rate	21,116	21,169	21,435	21,704
0.5% Annual Growth Rate	21,116	21,222	21,757	22,307
1.0% Annual Growth Rate	21,116	21,327	22,415	23,558

Using the 2019 Census estimates as the baseline, the housing demand forecast is done under three population increase scenarios. In 2019, Hays household population was 19,741, which was 94% of the total population. Sixty percent (60%) of households lived in owner-occupied units and 40% lived in renter-occupied units. The vacancy rate for the owner-occupied units was 2.2% and the rate for the renter-occupied units was 9.4%. The average household size of owner-occupied units was 2.54 and the size of renter-occupied units was 2.13. According to the City of Hays, three houses were demolished on average each year from 2016 to 2020. The following assumptions are used for the forecast: 1) the percentage of household population in the total population, the percentages of owner-occupied and renter-occupied households, and the vacancy rates for owner-occupied units and renter-occupied units did not change from 2019 and would not change in the next 10 years; 2) the household sizes in both owner-occupied units and renter-occupied units would decline gradually; and 3) each year, three existing owner-occupied units and three renter-occupied units would be demolished.

With a 0.25% annual growth rate, the Hays population would be 21,169 in 2021, and 19,996 would live in households. There would be 11,997 residents living in owner-occupied units, and with a size of 2.53 residents in each household, 4,742 units would be needed. A vacancy rate of 2.2% would increase the need to 4,849 units. In 2019, there were 4,770 owner-occupied units in Hays. By 2021, the population increase would require Hays to have 79 more units than 2019. Assuming six units were demolished in 2020 and 2021, a total of 85 new units would be needed in 2020 and 2021, averaging 42 units each year. Using the same method, it is estimated that, on average, 23 new owner-occupied units would be needed every year in the next 5 years (2022-2026), and 23 would be needed each year from 2027-2031. Similarly, 83 new renter-occupied units would be needed each year in 2020 and 2021, 45 new renter-occupied units would be needed each year in the next 5 years (2022-2026), and 45 would be needed each year from 2027 to 2031.

Table 12: Housing Demand Forecast in Hays: Assuming 0.25% Annual Population Increase

	2019 Baseline	2019-2021	2022-2026	2027-2031
Population*	20,899	21,169	21,435	21,704
Household Population	19,741	19,996	20,247	20,501
Housing Demand				
<i>Owner Occupied</i>				
Household Population	11,849	11,997	12,148	12,301
Average Household Size	2.54	2.53	2.51	2.49
Housing Demand	4,665	4,742	4,840	4,940
Homeowner Vacancy Rate	2.2%	2.2%	2.2%	2.2%
Unit Needs at the End of Period	4,770	4,849	4,949	5,051
Replacement Need		6	15	15
Unit Needs during the Period		85	115	117
Average Annual Construction		42	23	23
<i>Renter Occupied</i>				
Household Population	7,892	7,998	8,099	8,201
Average Household Size	2.13	2.12	2.1	2.08
Housing Demand	3,705	3,773	3,857	3,943
Rental Vacancy Rate	9.4%	9.4%	9.4%	9.4%
Unit Needs at the End of Period	4,089	4,164	4,257	4,352
Replacement Need		6	15	15
Unit Needs during the Period		81	107	110
Average Annual Construction		40	21	22
Average Annual Construction: Owner-Occupied and Renter-Occupied		83	45	45

* The estimation of 2021 population is based on the Census 2020 total population (see Table 11).

With a 0.5% annual population growth rate, Hays would need 35 new owner-occupied units and 68 new renter-occupied units each year from 2022 to 2026, and 37 new owner-occupied units and 70 new renter-occupied units each year from 2027 to 2031 (Table 13).

Table 13: Housing Demand Forecast in Hays: Assuming 0.5% Annual Population Increase

	2019 Baseline	2019-2021	2022-2026	2027-2031
Population*	20,899	21,222	21,758	22,307
Household Population	19,741	20,046	20,552	21,071
Housing Demand				
<i>Owner Occupied</i>				
Household Population	11,849	12,028	12,331	12,643
Average Household Size	2.54	2.53	2.51	2.49
Housing Demand	4,665	4,754	4,913	5,077
Homeowner Vacancy Rate	2.2%	2.2%	2.2%	2.2%
Unit Needs at the End of Period	4,770	4,861	5,023	5,192
Replacement Need		6	15	15
Unit Needs during the Period		97	177	183
Average Annual Construction		48	35	37
<i>Renter Occupied</i>				
Household Population	7,892	8,018	8,221	8,428
Average Household Size	2.13	2.12	2.1	2.08
Housing Demand	3,705	3,782	3,915	4,052
Rental Vacancy Rate	9.4%	9.4%	9.4%	9.4%
Unit Needs at the End of Period	4,089	4,175	4,321	4,473
Replacement Need		6	15	15
Unit Needs during the Period		91	161	167
Average Annual Construction		46	32	33
Average Annual Construction: Owner-Occupied and Renter-Occupied		94	68	70

* The estimation of 2021 population is based on the Census 2020 total population (see Table 11).

With a 1% annual population growth rate, the need would be 6 new owner-occupied units and 115 new renter-occupied units each year from 2022 to 2026, and 65 new owner-occupied units and 122 new renter-occupied units each year from 2027 to 2031 (Table 14).

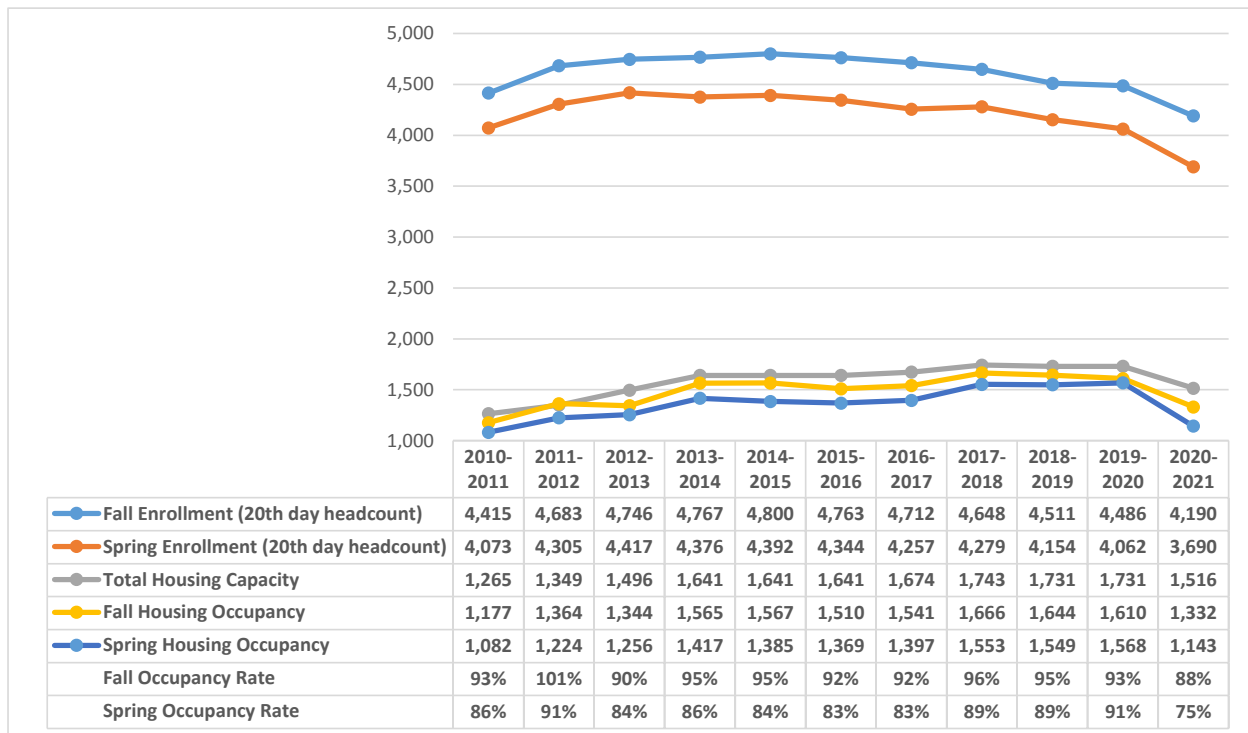
Table 14: Housing Demand Forecast in Hays: Assuming 1% Annual Population Increase

	2019 Baseline	2019-2021	2022-2026	2027-2031
Population*	20,899	21,327	22,415	23,558
Household Population	19,741	20,145	21,173	22,253
Housing Demand				
<i>Owner Occupied</i>				
Household Population	11,849	12,087	12,704	13,352
Average Household Size	2.54	2.53	2.51	2.49
Housing Demand	4,665	4,777	5,061	5,362
Homeowner Vacancy Rate	2.2%	2.2%	2.2%	2.2%
Unit Needs at the End of Period	4,770	4,885	5,175	5,483
Replacement Need		6	15	15
Unit Needs during the Period		121	305	323
Average Annual Construction		61	61	65
<i>Renter Occupied</i>				
Household Population	7,892	8,058	8,469	8,901
Average Household Size	2.13	2.12	2.1	2.08
Housing Demand	3,705	3,801	4,033	4,279
Rental Vacancy Rate	9.4%	9.4%	9.4%	9.4%
Unit Needs at the End of Period	4,089	4,195	4,451	4,723
Replacement Need		6	15	15
Unit Needs during the Period		112	271	287
Average Annual Construction		56	54	57
Average Annual Construction: Owner-Occupied and Renter-Occupied		116	115	122

* The estimation of 2021 population is based on the Census 2020 total population (see Table 11).

In Census surveys, university students living away from their parental home while attending college in the U.S. are counted at the on-campus or off-campus residence where they live and sleep most of the time. Therefore, the forecasted housing demand based on the U.S. Census data (Tables 10-14) includes the housing demand from the on-campus students at Fort Hays State University (FHSU). In the spring of 2021, a total of 2,860 students lived off campus (3,690 students enrolled and 1,143 housed on campus). Even though some of those students living off campus may stay with parents or commute from other communities, one can assume that more than 1,000 rental units in Hays would be occupied by FHSU students. FHSU had been providing more on-campus housing before the COVID pandemic outbreak in the spring of 2020, and, in general, the number of FHSU students living on campus had been increasing before the COVID pandemic (Figure 4). Since the on-campus FHSU enrollment has experience decline in recent years, additional on-campus housing has decreased demand for off-campus housing. However, FHSU does not expect to have more on-campus housing construction after the fall of 2017 in the near future, while recent strategic planning by FHSU administrators has called for increasing on-campus enrollment. Unless the on-campus enrollment at FHSU declines substantially, the FHSU students will sustain a high demand for the off-campus rental properties.

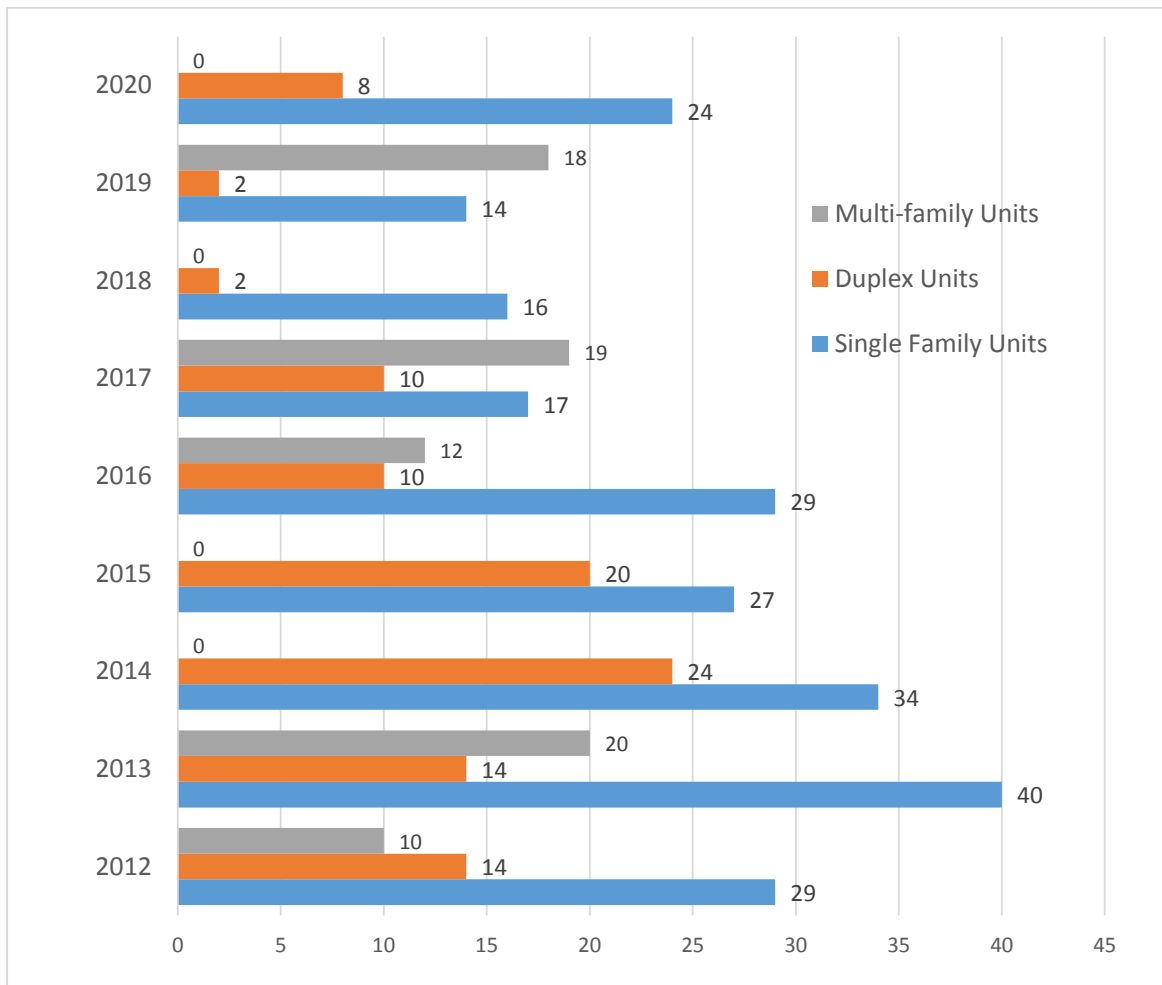
Figure 4: On-campus Enrollment and Housing Occupancy at Fort Hays State University



Source: Fort Hays State University

In the past five years (2016-2020), the City of Hays issued building permits for 100 single-family houses, 32 duplex units (16 duplexes), and 49 multi-family units (Figure 5). Assuming that all single-family houses became owner-occupied and all duplex and multi-family units became renter-occupied, on average, 20 owner-occupied units and 16 renter-occupied units were constructed each year from 2016 to 2020. If this housing supply trend continues and the population in Hays increases 0.2% annually, such supply would meet the demand for owner-occupied units, but would not meet the demand for renter-occupied units. If the population increases by more than 0.2%, neither the demand for owner-occupied units nor the demand for renter-occupied units would be met.

Figure 5: Number of Units to Which the City of Hays Issued Building Permits: 2012-2020



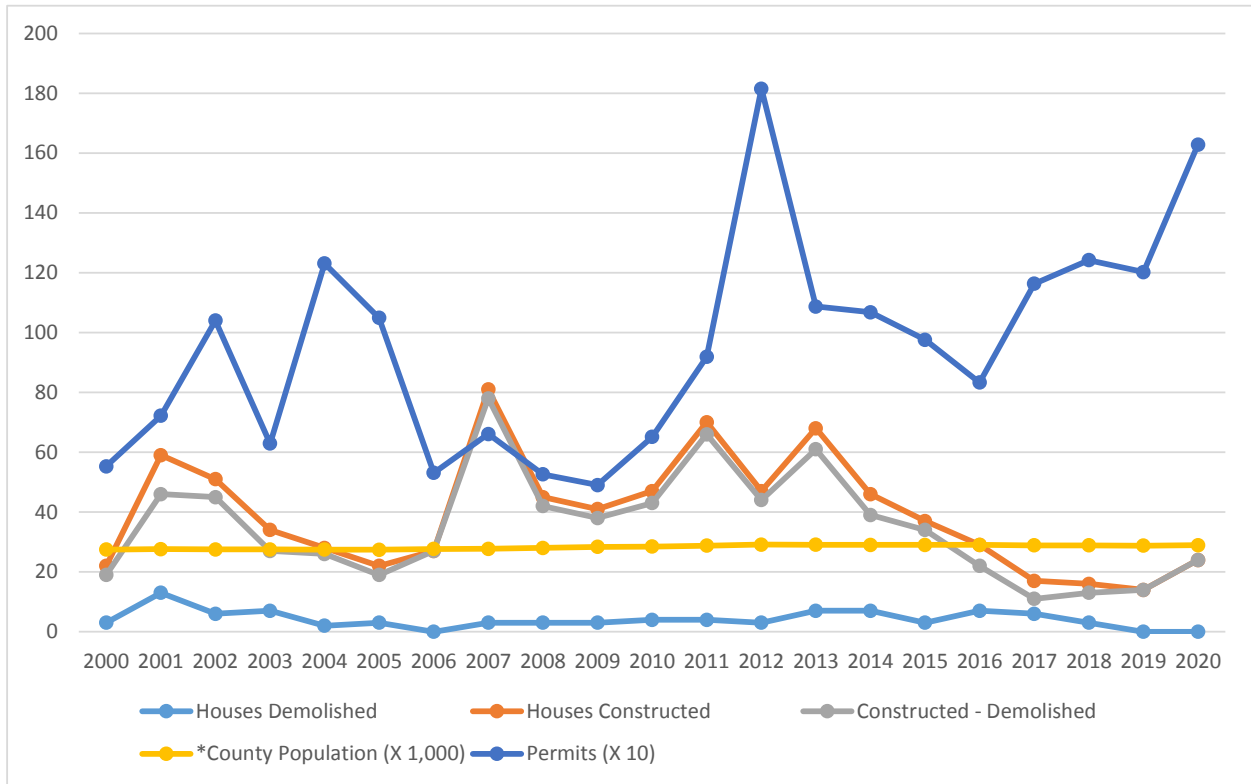
Source: City of Hays

II. The shortage of quality housing can be expected to persist and additional financial incentives are necessary in order to encourage the private sector to construct or renovate housing in such city or county;

Net Gain or Loss of Residential Units: The formula of new housing units constructed, minus existing housing units demolished, results in a low net gain (or loss) of residential units.

Figure 6 shows the net gain of housing (houses constructed minus houses demolished) between 2000 and 2020 exhibits a peak in added housing in 2007, followed by a series of declines and increases, but with an overall decline in additional housing units after 2007 until 2017. Although the trend increased a little since 2017, the average annual gain from 2016 to 2020 was 17, much lower than the annual average of 49 from 2011 to 2015. The number of building permits issued reflect similar trend, with peaks in 2012 and 2020, largely due to the roof replacement caused by a hail storms. Ellis County has had a steady population increase since 2000 (see also decennial Census data in Table 10), a trend demographic studies have shown will increase as residents of rural communities migrate to the larger towns and cities in pursuit of employment. Although there is currently a net gain in housing, that net gain has slowed down since 2016 at a time when the Hays population is increasing.

Figure 6: Housing Construction and Demolition in Hays

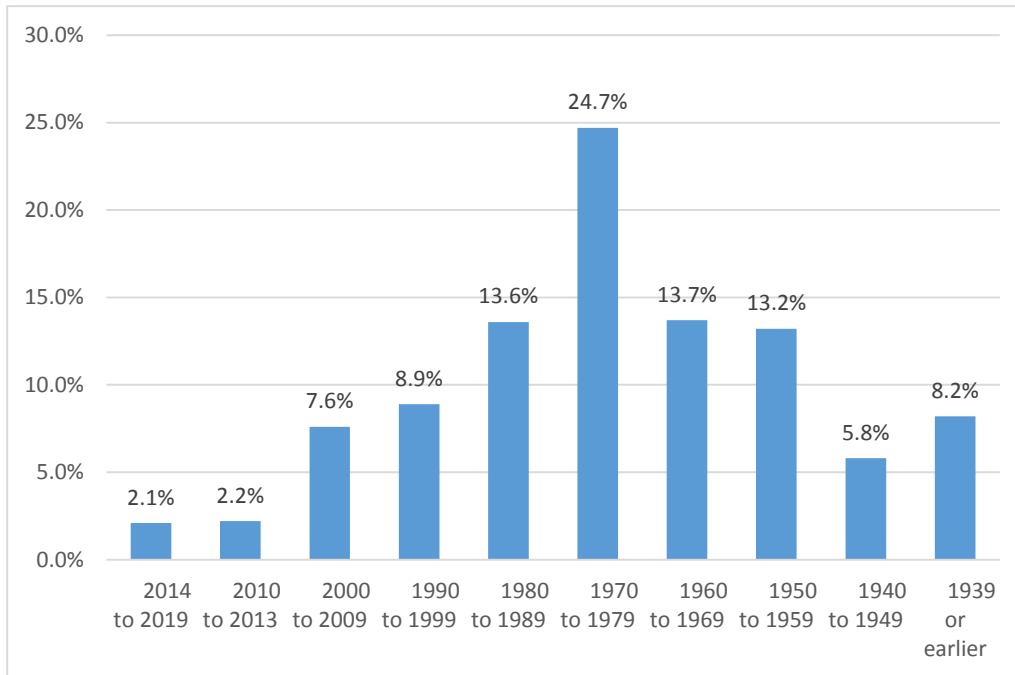


Source: City of Hays, U.S. Census

Housing Suitable for Rehabilitation: Existing housing units, suitable for rehabilitation, are present, but little or no rehabilitation activity is occurring

Figure 7 shows the percentage of housing units in Hays by year of construction. It indicates that approximately 35% of the housing units in Hays (4,125 units) were constructed at least 50 years ago, making many highly likely to be suitable for rehabilitation.

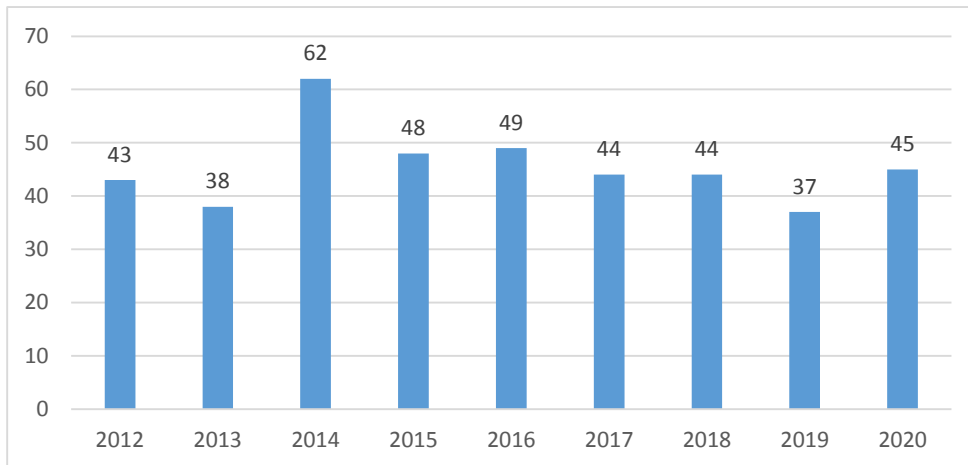
Figure 7: Year Housing Structure Built - Hays



Source: U.S. Census, 2015-2019 American Community Survey

Although almost 4,000 houses in Hays are over 50 years old, an average of only 44 permits per year for rehabilitation have been issued over the past 5 years (Figure 8). The large discrepancy between houses suitable for rehabilitation and the number of permits issued to rehabilitate Hays housing over the last 3 years strongly suggests that additional incentives are required to maintain the quality of the older housing units in Hays.

Figure 8: Permits for Rehabilitation Issued by the City of Hays



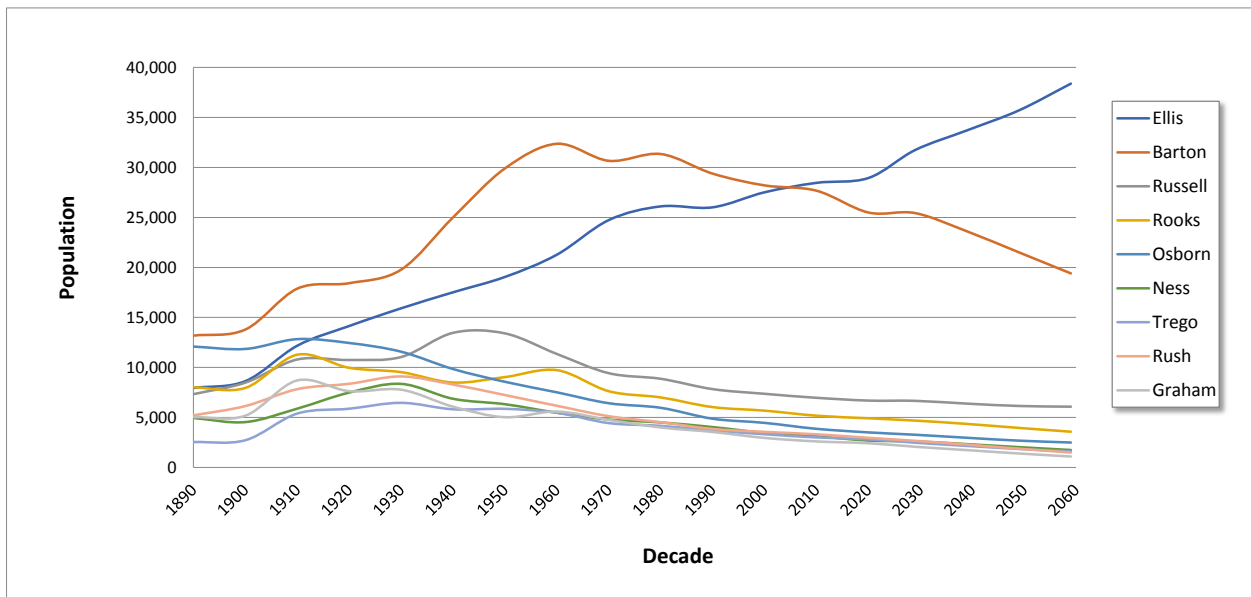
Source: City of Hays

III. The shortage of quality housing is a substantial deterrent to the future economic growth and development of such city or county.

As one of the larger towns in rural Western Kansas, Hays has been a regional hub for commerce and economic activity, as demonstrated by the indicators presented below. A migration study conducted by the Docking Institute has projected Hays to experience continued growth and employment, as the demand for agricultural labor wanes due to modernization and the declining availability of agricultural ground water and rural Kansans turn to industrial and white-collar jobs in the urban areas. Figure 9 shows how data from the US Census also suggest that population in the rural counties surrounding Hays are migrating, and will likely continue to migrate, into Ellis County.

Data for the years 1890 to 2020 are population estimates derived from censuses taken each decade by the US Census Bureau. Data for the years 2030 to 2050 represent population forecasts. This increasing labor availability makes Hays a prime community for long-term economic growth. However, a shortage of suitable housing for this future work force would be a barrier to economic growth and development for which corrective action would take years. It is, therefore, imperative that Hays administrators take a proactive approach to maintaining an adequate quantity of new and rehabilitated housing unit.

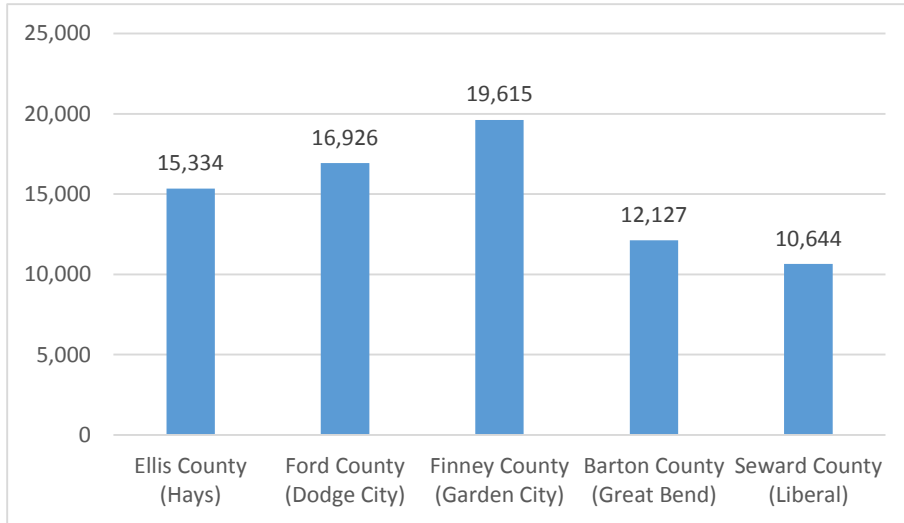
Figure 9: Population



Source: U.S. Census

Figure 10 shows that, in 2019, the Kansas Department of Labor estimated over 15,000 jobs in Ellis County, rivaling that of its larger sister counties with larger populations. These data suggest that Hays has one of the largest and strongest labor forces in Western Kansas.

Figure 10: Number of Jobs



Source: Kansas Department of Labor: Kansas Economic Report 2020

IV. The future well-being of the city or county depends on the governing body providing additional incentives for the construction or renovation of quality housing in such city or county.

Although our analysis has shown that upper income housing is adequate, Section I documents a shortage of housing in Hays for low to middle-income families. Further analysis in Section II showed a low number of demolitions and a disproportionately high number of older houses in Hays, strongly suggesting that, without additional incentives, this housing shortage is very likely to persist. Section III projects continuing migration into Ellis County, as well as a high number of jobs relative to its population size, strongly suggesting that the persistent housing shortage will be a major obstacle to economic growth and development.

Low to middle income housing in Hays is utilized extensively by the approximately 4,000 students who attend Fort Hays State University. Recent strategic plans of FHSU have included goals of substantial growth in the on-campus student body. Increasing numbers of on-campus students attending FHSU will place further strains on the availability of low to middle-income housing in Hays.

The Superintendent of Planning, Inspection and Enforcement for the City of Hays reports that between the years 2000 and 2020, only 63 (16%) were “income-based” or “income-qualified” housing. Further, all 63 units were built by a single developer. So only one developer in the past 20 years has found it profitable to construct the type of housing for which this study has documented a strong need.

Hays offers a wide variety of educational, recreational, and cultural amenities conducive to attracting new employers and high-quality labor. It also offers a wide range of business support services necessary. The availability of affordable, high-quality housing is one of the few obstacles to economic growth and development in Hays. The shortage of affordable housing for those who would otherwise find Hays an attractive community to work, go to school and raise children makes these incentives extremely important for the future of Hays and Western Kansas.

Attractive Business, Education, Recreational and Other Opportunities

Affordable housing is only one factor that attracts business and commerce to a city. In order to justify government subsidies for housing for the purpose of fostering economic growth and development, it is important to document that potential new employers will find that the community can provide for all of their needs. These include the availability of raw materials and services needed to operate their businesses, but also the social, educational and recreational amenities desired by their prospective employees.

Higher and Continuing Education

Fort Hays State University – FHSU is a public, co-educational university located in Hays, Kansas. It is the third largest of the 6 state universities governed by the Kansas Board of Regents, with an enrollment of approximately 15,000 students (4,190 on-campus, 6,768 online, and 4,075 international partnership students). FHSU offers a variety of undergraduate and graduate programs. Its extensive online program allows local employees of Hays’ businesses to complete coursework during times available to them, yet have ready access to professors and the extracurricular activities offered.



Sheridan Hall – Fort Hays State University

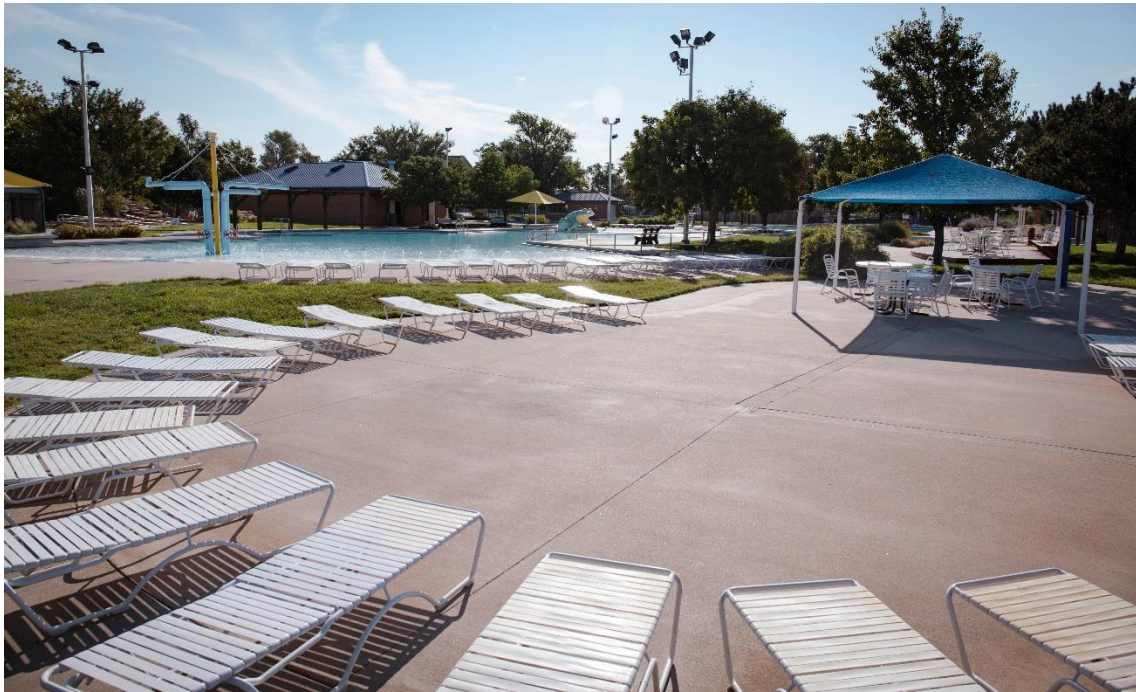
North Central Kansas Technical College – For employers with a need for employees trained in the latest industrial technologies, NCKTC offers a variety of programs designed to meet the training needs of commerce and industry. Some of these include nursing, business technology, carpentry, electrical, automotive, pharmacy technology and culinary arts.



Business Occupation Center – North Central Kansas Technical College

Recreational Amenities

Hays Aquatic Park – Hays offers a recreational swimming park with a slide pool, diving pool, competition pool and children’s pool to residents during the summer months. With low-cost admission, plenty of seating and a refreshment facility, the Hays Aquatic Park is the ideal daytime venue for children during their summer break, as well for families enjoying quality time on the weekend.



Hays Aquatic Park

Old Fort Hays – Residents and visitors can experience a bit of post-Civil War history by visiting Old Fort Hays. Established in 1865 in the land of the Cherokee and Arapaho, the fort protected railroad workers and travelers on the Smokey Hills Trail. Included in its history are famous military leaders and lawmen, such as George Custer, Phillip Sheridan, Buffalo Bill Cody and Wild Bill Hickok.



Old Fort Hays

Frontier Park/Buffalo Herd- Adjacent to Old Fort Hays, Frontier Park offers shaded picnic areas, an 18-hole frisbee golf course and is adjacent to a small buffalo herd reminiscent of Western Kansas in the early 1800's.



Buffalo Herd – Frontier Park

Private and Municipal Golf Courses – Nestled within a residential area in Hays, the Smoky Hill Country Club (pictured below) offers an 18-hole private course, a pro shop, a pool, and dining facilities. The City of Hays also operates an 18-hole municipal golf course adjacent to Old Fort Hays. Both of these Hays courses have hosted high school regional and state championship tournaments. Smoky Hill Country Club is a regular site for NCAA Division II college tournaments and hosted the Kansas Junior Amateur Championship in 2021.



Smoky Hill Country Club

Bicycling – Hays offers bicycling enthusiasts a network of bike lanes for safely while navigating the City, as well as a two-mile paved biking/walking trail circling the southwest border and passing by Fort Hays State University, Old Fort Hays, the buffalo herd and Frontier Park.



Bike Lanes

Bickle-Schmidt Sports Complex – Next to the Fort Hays State University soccer field, the recently constructed Bickle-Schmidt Sports Complex offers 8 baseball/softball fields and 8 soccer/football fields, along with restrooms and concessions. A doge park was even more recently added.



Bickle-Schmidt Sports Complex

Downtown Hays/Gellas – Historic downtown Hays, with its Chestnut District of shops, restaurants and professional services, provides a venue for numerous cultural events and upscale shopping. A local favorite is Gellas, which operates a micro-brewery and offers a wide assortment of foods and beverages.



Downtown Hays

Sternberg Museum – Operated by Fort Hays State University, the Sternberg museum, named after a noted local paleontologist who pioneered excavations in the region, houses hundreds of fossils recovered by Sternberg and his team. The fossils demonstrate quite convincingly the fact that Western Kansas, at one time, was underwater.



Sternberg Museum

Business Support Services

In addition to the many educational and recreational amenities offered to Hays residents, the community also accommodates many of the standard products and services needed by typical businesses for maintenance and appropriating supplies. Businesses offering these goods and services include Walmart, Home Depot, banking institutions, dozens of practicing attorneys and accountants, printing services and easy access to Interstate 70. Fort Hays State University provides a steady, reliable source of highly educated labor for local businesses, whether it be college graduates looking for career opportunities or students wanting part-time employment.

Efforts and Innovations Toward Affordable Housing

The affordability issue demonstrated by this study is not unique to Hays. Housing affordability has been a crisis in many U.S. cities for years, and currently is aggravated by a major housing shortage across the nation amid the COVID-19 pandemic. Many innovative solutions have been initiated from private companies and non-profit organizations. Some construction companies (e.g., Entekra in California, FullStake Modular in New York) utilized off-site framing, or modular technology to increase productivity and thus reduced time and costs. Rhino in New York City offered renters the option of paying a monthly low-cost insurance in lieu of a cash security deposit. With crowdfunding approaches, home buyers in Baltimore can use gifts from family and friends as down payment. Some companies developed data service systems that helped renters develop payment solutions or included rent as a factor of credit scores. Nesterly in Boston connects students who are looking for affordable residences with senior households who have space and need additional income to satisfy the needs of both parties.¹ Some big tech companies, who to some extent fueled the housing crisis, also became engaged in the efforts to deal with affordability issue. For example, Microsoft committed \$500 million for homeless services and affordable homes in the Seattle Region in 2019.²

There were also efforts and measures from state and local governments. Many states and cities established **affordable housing trusts** that provide public funding for low-income housing development. Some large cities (Austin, Texas; Chapel Hill, North Carolina; Portland, Oregon) issued **municipal bonds** for land purchase, affordable housing construction, rental assistance, and/or home repair. **Incentives** such as tax breaks and land donation were also experimented with by cities and states. For example, in 2019, St. Paul, Minnesota, announced a program to offer property tax breaks to encourage landlords to preserve 20% of their building units for affordable rent for 10 years. Anaheim, California, donated vacant land to a nonprofit developer for constructing affordable houses in 2019. Some states and cities also removed regulatory barriers by **relaxing or developing zoning** ordinances. Austin, Texas, waived height/density restrictions and parking requirements for low-income housing development. To encourage higher density development, Minneapolis rezoned single-family lots to multi-family, and Santa Cruz County in California took a similar approach to allow more housing units on lots. Oregon even ended single-family zoning in the whole state. The California Senate recently gave an initial approval to a

¹ https://ssir.org/articles/entry/innovative_solutions_for_the_housing_crisis, Retrieved August 4, 2021

² <https://www.geekwire.com/2019/microsoft-will-spend-500-million-address-affordable-housing-homelessness-seattle-region/>. Retrieved August 30, 2021

bill that would allow two-unit buildings to be built on lots zoned for single family, and the bill is awaiting the second approval in the Senate before it reaches the governor. Affordable housing has also been included in *neighborhood revitalization* projects. The approaches can be very comprehensive, varying from transforming vacant land and buildings into affordable housing, encouraging mixed-use development, to providing financing and technical assistance for low-income households to purchase homes and manage resident owned community (ROC).³

The lack of affordable housing has even more salient impacts on residents in rural communities as compared with large cities, as many of them are struggling with maintaining their population and sustaining public services. The uniqueness of rural communities calls for local approaches. In Kansas, Stafford County Economic Development (SCED) secured two grants from the Kansas Housing Resources Corporation HOME Program and the Federal Home Loan Bank Affordable Housing Program for constructing 10 low-cost, energy-efficient houses in the county. The house is designed by the Net Positive Studio at Kansas State University. It has three bedrooms and two bathrooms with a mortgage between \$100,000 and \$125,000. With integrations of technologies like solar panels, insulation, and energy-efficient windows, the house “is expected to have \$0 in annual net energy costs” when operated conservatively in energy use. Those houses will be built on land where dilapidated houses were torn down, so there is no need for new streets and infrastructure. The first house has been constructed in St. John in the spring of 2021, and SCED plans to rent those 10 houses out after they are constructed.⁴

In Norton County, Kansas, a housing program, called *Fresh. New. Norton County*, was announced by Norton City/County Economic Development (NCCED) in June 2021. In order to encourage developers and residents to flip, renovate, or build a home in the county, the program provides eight grant-funded incentives:

- Developers receive 0% interest short-term funding for purchase, renovation, and resale of houses identified as dilapidated or with major wear.

³ https://ssir.org/articles/entry/innovative_solutions_for_the_housing_crisis, Retrieved August 4, 2021
<https://therealdeal.com/sanfrancisco/2021/08/30/california-senate-bill-to-end-single-family-zoning-could-increase-affordable-housing/>. Retrieved August 31, 2021
<https://salud-america.org/6-emerging-ways-cities-can-solve-the-affordable-housing-crisis/>. Retrieved August 10, 2021

⁴ <https://www.staffordecodevo.com/blog/k-state-students-designed-a-prototype-of-solar-homes-that-cost-about-100000>. Retrieved September 8, 2021
<https://www.staffordecodevo.com/blog/there-are-solutions-to-the-rural-kansas-housing-crisis>. Retrieved September 8, 2021

- Developers receive free lots within the Cities of Alma, Lenora, or Norton for residential units that meet the minimum quantity/quality, design, and timing requirements specified for the parcel.
- A bundled package of grants and incentives of approximately \$10,000 to \$12,000 is provided for constructing a new home on a cleared lot with city infrastructure in Alma, Lenora, or Norton.
- A buyer of a home used as a primary residence in Alma, Lenora, or Norton receives a one-time closing cost grant and a 0% down-pay loan.
- The landfill fees are waived when an uninhabitable house is cleared and the lot is made ready for new construction.
- A rebate grant is provided to cover up to 10% of material costs when an owner-occupied older house is given an upgrade that qualifies as a major rehabilitation project with material purchases exceeding \$20,000.
- A one-time grant of \$300 is provided to residents who paint their homes.
- A one-time grant of \$5,000 is provided for residents who transition their home ownership to qualifying senior housing, assisted living, or long-term care with Norton County.⁵

Conclusions

The data and analyses of this report have documented, under criteria established by the Kansas Secretary of Commerce, the City's need for State assistance in fostering economic growth and development in Hays and Ellis County. The analyses have provided empirical evidence that 1) there is a shortage of suitable housing for the current and future work force, 2) the shortage of housing is expected to persist without additional incentives to private sector investors, 3) the current and projected shortage of quality housing is a deterrent to the future growth and development of Hays and 4) the future well-being of Hays and Ellis County is highly dependent on further government support of the local private housing industry.

⁵ <https://www.freshnewnortoncounty.org/>