



Livingston County Housing Needs Assessment & Market Analysis

Prepared by:

MRB | *group*

February 2020

About this Study

In 2019-2020, Livingston County engaged MRB Group to assist the County and its partners to undertake a countywide Housing Needs Assessment and Market Analysis to address current and future housing needs, analyze the existing and prospective housing market, and document demographic and economic trends.

This Housing Needs Assessment and Market Analysis was developed to help housing providers, municipalities, Livingston County agencies, and not-for-profit organizations better understand the existing housing market and the needs of County residents. It summarizes existing housing initiatives in the County, provides updated demographic and economic data, provides data-rich information on the current housing stock and a real estate market analysis, and offers strategies and recommendations for Livingston County and its partners to encourage housing solutions and development projects that meet both market demand and community priorities. Recommendations from this study will be used to guide housing policy decisions, encourage public-private collaborations, and be an instrumental tool for leveraging future funding opportunities.

In addition to receiving guidance from the Project Steering Committee, MRB Group undertook significant community engagement to facilitate input from a variety of stakeholders. This engagement included:

- Stakeholder engagement survey
- Homelessness and Housing Task Force meeting
- Key stakeholder agency interviews
- Special/vulnerable populations interviews
- Municipal leadership interviews
- Developer interviews and testing
- Two public engagement sessions (Realtors & Lenders focus group meeting; Community Champions focus group meeting)
- Two public hearings (7/11/2018 and 1/22/2020)
- Livingston County Board of Supervisors meeting

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Executive Summary

Livingston County is currently experiencing a tight housing market with low inventory, quick home sales, and low apartment vacancy. Given low interest rates and a strong labor market (nationally and in Livingston County), it is expected that home sales activity in Livingston County will continue to be strong in the relative near future, and that a modest amount of new housing inventory—particularly modestly priced single-family homes and affordable (non-market-rate) apartments—would be readily absorbed.

With no major single-family home developments planned, and significant challenges in siting new affordable (non-market-rate) apartment complexes, low inventory and the absence of new construction would contribute to rising housing prices and affordability challenges for Livingston County residents. Low-income residents will continue to have difficulty finding housing with affordability protections, and residents who do not qualify for such housing but earn modest incomes will find themselves increasingly cost-burdened by their mortgages, rents, and the upkeep of older homes.

Livingston County faces the following key housing needs:

- There is a prevalent desire for new construction of market rate, single-story, single family homes suitable for first-time homebuyers, young families, and downsizing seniors, at prices of less than \$200,000. Developers believe demand is limited to smaller and scattered-site developments of such housing, as opposed to large-scale subdivisions.
- There is excess demand for affordable rental housing of all types (for those earning below or just above \$32,194, which is 60% of area median income), with the most acute need being for 1-bedroom units and 3-4 bedroom units, but communities that could absorb significant numbers of units have not demonstrated a commitment to such development. Developers affirmed this substantial demand, and encouraged communities that desire such housing to indicate interest and provide information on suitably zoned available land.
- Additional supportive housing is needed for people with disabilities and for those in recovery from chemical dependency.
- Additional enriched housing, adult home products, and housing suitable for seniors to age in place are needed.
- Additional or strengthened programs and services are needed to help very-low-income residents and those with special needs (probationers, parolees, victims of domestic violence) to find and remain in long-term, appropriate housing situations.
- Residents need additional assistance toward improvements of older single family homes, and need continued outreach to increase awareness of existing assistance.
- Municipalities are in need of tools to fight further conversion of single family homes into multiple units, as well as effective mechanisms to address derelict properties.

The final chapter of this study provides implementation strategies and recommendations for Livingston County, its municipalities, and its other partners to address current and future housing needs. These market-tested strategies are based on a thorough analysis of the existing housing stock and the needs of current and future residents, and grounded in an understanding of market conditions and community priorities. They are organized by the overarching goals of 1) combatting deterioration of aging housing stock, 2) increasing housing affordability, 3) increasing housing choice, and 4) developing and aligning policy frameworks to address housing objectives.



Livingston County Housing Needs Assessment & Market Analysis

Chapter 1: Baseline Housing Initiatives

Prepared by:



Introduction

Livingston County has partnered with MRB Group's SmarterLocalGov initiative to develop a countywide housing needs assessment, market study, and associated strategies. As part of this effort, MRB Group team members have been charged with developing a baseline inventory of current services and programs as well as private, non-profit, and public operators and service providers in Livingston County. This report seeks to address this task and provide an overview of relevant demographic indicators.

In order to obtain information on existing plans, services, and other efforts, as well as to understand the players in the Livingston County housing market, our team leveraged the knowledge and expertise of the County's Housing and Homelessness Task Force (HHTF). The Task Force consists of 39 individuals representing 23 agencies committed to safe, healthy housing for their constituents. So as to capture a baseline of information from all agencies, our team executed a survey seeking to identify each agency's role in both the Task Force and in Countywide community development; as well as information critical to the task at hand (needs, overlap, potential developers, etc.). We received responses from a majority of agencies on the Task Force, and the results are in the ensuing narrative.

Based upon survey results, we worked with County staff to identify a sub-set of agencies whose work would be most relevant to the initial task in the study. Our team conducted a series of in-person and phone interviews with nine agencies, in order to get a "deeper dive" on agency activities, workload, and other information critical to this element of the project. We identified additional agencies and stakeholders with whom we conducted additional interviews in future phases.

In addition to targeted interviews, our team reviewed a significant collection of County-driven reports and studies on housing needs in Livingston County, as well as information on related topics like utilities and services. This, coupled with interviews focused on the housing needs of special populations (individuals with disabilities, the elderly, residents suffering from substance abuse issues, veterans, victims of domestic violence, parolees and probationers), provided a detailed picture of past and present initiatives, and Countywide strategies that affected the approach to housing strategy implementation.

It is evident from our research that the County has a robust set of housing program offerings, but still struggles to cope with the demands of a largely rural geography and a segment of the population that struggles with health issues and poverty. Agencies work to efficiently allocate local and extra-jurisdictional funds, but consistently are challenged by bottlenecks associated with staffing, resources, and the complex nature of the needs of special populations.

With respect to special populations, the County has developed a powerful tool in the Housing and Homelessness Task Force, an outgrowth of Livingston County's participation in the NY501 regional Continuum of Care (CoC). This represents the greatest opportunity for collaboration across County agencies and partners. The Task Force challenges agencies to think outside of their traditional scopes, and seeks to hold everyone accountable for shared goals and objectives.

Research Approach and Initial Findings

Our research involved a multi-pronged approach, with an initial agency survey serving as the basis for deeper analysis. The survey was deployed to all members of the Housing and Homelessness Task Force, of which 13 of 23 member agencies responded. Additionally, two agencies that did not participate in the survey were interviewed directly as part of the process.

Survey topics included:

- Roles of individual agencies involved in Livingston County housing matters
- Identification of gaps in product, programs, and services
- Opportunities for enhanced coordination among agencies
- Other providers/developers we should speak with as part of this exercise

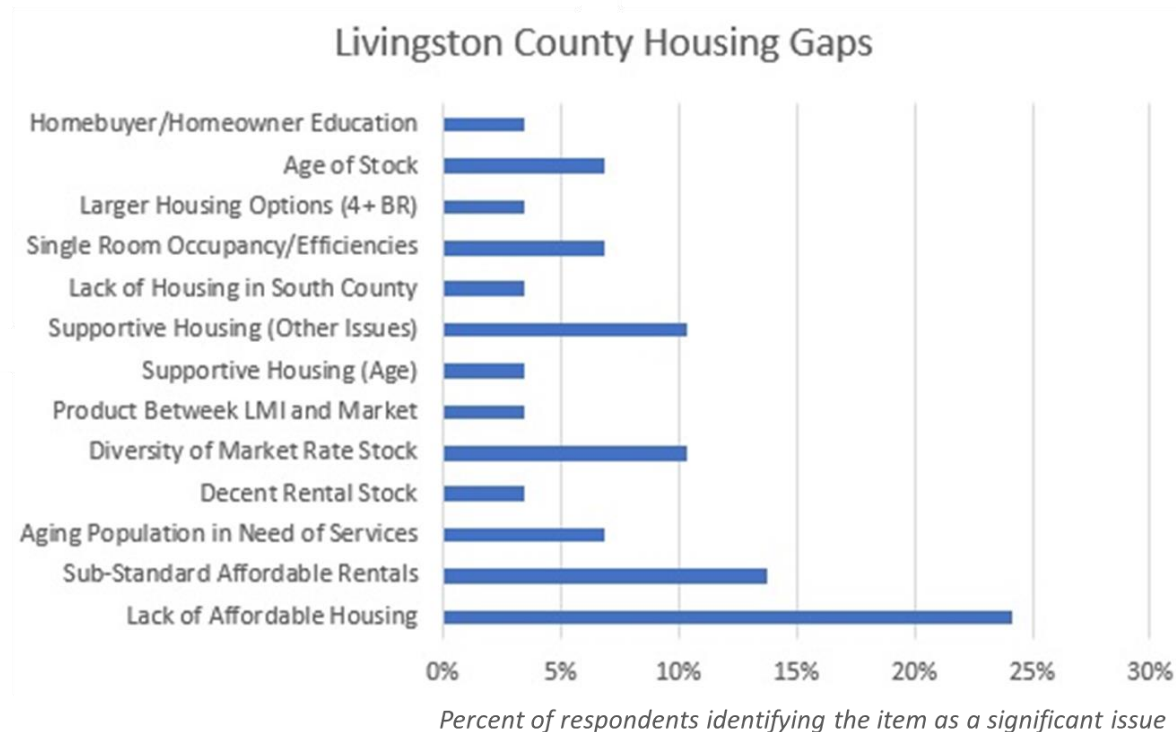
Agencies that identified as housing or housing service providers highlighted the following programs, services, and products as part of their respective missions:

- Livingston County Land Bank: Acquires properties through tax foreclosure and other means, makes them ready and available for development primarily of affordable housing solutions, and contracts with organizations and private companies to undertake development of properties for low- to moderate-income home buyers.
- Livingston County Workforce Development: Consults for other agencies on workforce opportunities for economically disadvantaged clients.
- Livingston County Planning Department: Provides technical assistance to local municipalities in land use regulation and code regulation, as well as grant writing and other services.
- Livingston County Office for the Aging: Provides information and assistance for referrals for clients seeking housing solutions. Additionally, makes referrals to and provides funding for Home Safe Home to support minor accessibility improvements for clients.
- Livingston County Department of Health: Ensures safe and sanitary condition of housing countywide, with particular emphasis on environmental health, including water, septic, indoor air quality, and lead paint issues.
- Chances and Changes: Owns, operates, and manages properties to support transitional needs of victims of domestic violence and other special populations.
- Arbor Housing and Development: Non-profit developer, owner, and operator of supportive housing and care management programming.
- Livingston County Mental Health Services: Coordinates the County's Single Point of Access (SPOA) programming to support care of individuals with mental health issues.
- Legal Assistance of Western New York: Provides legal counsel and other assistance to prevent homelessness and foreclosure.

- Catholic Charities of Livingston County: Operates temporary housing shelters for families and provides support for housing related expenses (rent, security deposits, utility payments, etc.). Additionally, provides transitional counseling to inmates with impending release dates.
- Livingston County Department of Social Services: Provides homelessness intervention services and identifies/facilitates opportunities for emergency, transitional, and permanent housing. Manages federal housing voucher program.
- Livingston County Probation Department: Coordinates with other County and State agencies to address housing needs for clients.
- The Arc of Livingston-Wyoming/Person Centered Services: Owns and operates supervised and supportive housing and provides care and transportation services to those with developmental disabilities.
- Livingston County Economic Development: Works with developers to identify market opportunities and feasible sites for housing and other development.
- Livingston County Industrial Development Agency: Public benefit corporation with the power to provide tax abatements and other incentives to promote development that creates and retains employment opportunities, and as such can potentially play a role in enabling mixed-used developments that include a residential component.
- Genesee Valley Rural Preservation Council: Carries out housing development, property manage, rent, and related services; administers home repair programs; and owns and manages apartments for the elderly, disabled, and families.
- CASA-Trinity: Owns and operates housing and treatment operations for those suffering with substance abuse and related issues.

Housing Gaps

Members of the Task Force were asked to identify prevalent housing gaps in the Livingston County market; particularly—but not exclusively—for those special populations served by their respective agencies.



The most significant gaps identified included a general lack of affordable housing¹ (identified by nearly a quarter of respondents), the condition of affordable rental stock, a lack of diversity in market rate stock, and supportive housing for victims of domestic violence, those with disabilities, and individuals challenged by substance abuse.

¹ Throughout this report, and in this chart, the term “affordable” is used in the general sense to describe housing that is within residents’ means and does not leave them cost-burdened. In later data analysis sections, units listed as “affordable” refer to those made available to lower-income families at less than market value, typically having been developed with government subsidy; in such cases, this clarification is made.

Planning Context

In addition to the Task Force Survey and associated interviews, our team conducted a review of relevant reports and studies that addressed the County's housing issues. These included:

- Community Initiatives Council Needs Assessment (2016/2019): A survey and associated research findings relative to poverty and similar issues in the County.
- Livingston County Economic Development Strategic Plan (2016): A countywide strategy for diversifying the economic base through business recruitment, retention, and expansion, and the development of placemaking and quality of life amenities.
- Livingston County Strategic Plan (2019): Establishes a vision and mission for County agencies, and identifies priority projects, programs, and services for advancing the vision.
- OASAS Local Services Plan (2019): Annual report filed with the State on actions and steps taken to support the needs of those suffering from substance abuse and related issues.
- NY-501 STEPS Action Plan (2019): Strategic plan to support a continuum of care approach to homelessness intervention and prevention.

Each of these reports was robust and diverse in its means of addressing a range of issues specific to certain populations. Our team reviewed these reports and gleaned housing-related observations and strategies. In addition, MRB Group reviewed municipal comprehensive plans, the THRIVE LivINgston comprehensive countywide rural anti-poverty strategy, drafts of the Countywide water and sewer study being completed by CPL, the draft preliminary engineering report for broadband development being completed by Hunt, and various materials and data provided by agency interviewees.

Trends and Issues

Housing Condition

- *Age of Housing*: Approximately sixty percent of housing in the County was built prior to 1979. This drives a range of issues, but largely weighs on housing condition and cost. Older homes are typically less energy efficient and require more maintenance. The cost to operate and maintain a home often proves to be too much of a challenge for those with limited income; including the elderly, first-time homebuyers, and those with disabilities.
- *Accessibility Issues*: Another factor often driven by age of the home is accessibility for those with physical disabilities. Older homes in this region tend to be multi-story with many functional infrastructure items located in a basement. Rooms are often smaller and doorways/hallways are ill-equipped to support wheelchairs and other accessibility mechanisms. As the population ages and individuals with disabilities seek independent living scenarios, the prevalence of this home type is an inhibitor.

Market Issues

- *Housing Geography:* There is a clear sense of market divide in the County. Single family homes tend to be more expensive in communities in the northern part of the County, while the southern part of the County (Dansville excepted) has limited services and product.
- *Predominance of Owner-Occupied Housing:* Over 70% of all housing units in Livingston County are owner-occupied. This presents a challenge for meeting demand for rental units. That said, Section 8 staff suggested that they have reliable apartment complex contacts who typically have product available for clients who are able and willing to relocate to the communities housing this product, and who do not have disabilities limiting them from multi-story living.
- *Lack of Housing for Special Populations:* A clear message came from survey and interview participants, and from planning background documents—the County is significantly underserved with respect to housing for the homeless, domestic violence victims, those suffering from substance abuse and related issues, and those with disabilities. In many situations, transitional housing is relegated to motels in the County, which creates a host of issues for probationers and substance abuse sufferers; to say nothing about the cost associated with this type of housing. Even with new units online in the last twelve months, a substantial gap remains.
- *Lack of Workforce Housing:* The age of housing stock and concentration in limited geographies tend to make housing for first-time homebuyers and other members of the workforce in the County difficult to obtain. Many workers employed in Livingston County travel in from neighboring counties.
- *Housing Size:* Agencies report a significant deficit in the availability of single room occupancies and housing for larger families (4+ bedrooms).
- *Supportive Housing—Elderly:* There is a lack of enriched housing or adult home projects in Livingston County, and a shortage of assisted living options for those not requiring nursing home-level care. There are very few housing options for any type of supportive care for those seniors with Medicaid assistance.
- *Lack of Halfway House Product/Program:* Individuals transitioning from residential substance abuse treatment are forced to move directly into independent living situations, which increases the risk of relapse and continued care needs.

Affordability

- *Housing Insecurity:* According to the 2019 Community Initiatives Council Needs Assessment and Community Survey, over 40% of respondents indicated housing insecurity as an issue. The study found that housing cost burden (over 30% of household income spent on housing expenses) was disproportionately affecting renters.
- *Gap Between LMI and Market Rate:* Most low-and-moderate income products in the County are focused on those below 60% of area median income (that is, those earning below \$32,194, which is 60% of Livingston County's AMI of \$53,654). As such, a big chunk of the rental market is left without product for those earning more than \$32,194, who would therefore not qualify but also may not have the means to access market rate housing. Such individuals are left without choice, or become cost-burdened.

- *Jobs for Special Populations:* Agencies supporting victims of domestic violence, those suffering from substance abuse, and those with disabilities are reporting significant difficulty with these populations obtaining and maintaining employment. Thus, even where housing costs are substantially covered, these populations continue to struggle with basic life needs.

Public Perception

- *Neighborhood Impacts of Housing:* Agencies working to develop or operate lower-income housing and housing for special populations indicate challenging experience in communities that are under-informed about the quality of life impacts on neighborhoods where this housing is located. Public perceptions regarding risk of increased crime and property maintenance costs in the neighborhood tend to find their way into the narrative, despite studies showing a lack of a causal link between affordable housing and increases in crime² or decreases in property values.³
- *Service Demands:* Local jurisdictions are expressing concerns about demands on public safety and infrastructure as it relates to new development. Another narrative in play is that lower-income housing creates a disproportionate demand on these services. However, research suggests that lower-income housing developments, by reducing homelessness and housing insecurity, lowers costs for the cost of many services to a host community, for example by reducing use of emergency health care services,⁴ and can add significantly to local income and to tax revenue.⁵

Programmatic Concerns

- *State/Federal Program Funding Volatility:* Across the spectrum of agencies serving special populations, representatives cited “good times” and “bad times” as it relates to federal funding. Specifically, there are historical issues regarding allocation of Section 8 vouchers to the County, and the slow growth of direct benefit programs like Medicaid fail to keep pace with the increasing cost of housing in the market.
- *Staffing Shortages:* This is felt most acutely for in-home care scenarios. Seniors and others who have had the benefit of home health aides are unable to find qualified staff to address their needs. This reduces the feasibility of continuing to age in place, often requiring seniors to be placed in a residential facility, which is difficult to access in Livingston County.
- *Section 8 Wait List:* The County’s Section 8 wait list was closing in on 400 people as of August 2019, though available vouchers could allow Livingston County to serve an additional 60 families. The wait is extended such that other agencies are unable to rely on the program as a means of long-term housing placement.

² Matthew Freeman and Emily Greene Owens, “Low-Income Housing Development and Crime,” *Journal of Urban Economics*, Vol. 70, Nos. 2-3, 2011.

³ Lance Freeman, “Subsidized Housing and Neighborhood Impacts: A Theoretical Discussion and Review of the Evidence,” *Journal of Planning Literature*, Vol. 16, Issue 3, 2002.

⁴ “Affordable Housing Cost Study,” California Department of Housing and Community Development, 2014, and similar studies commissioned by other states.

⁵ “Impact of Affordable Housing on Families and Communities: A Review of the Evidence Base,” Enterprise Community Partners, 2014.

Other Issues

- *Transportation:* The rural geography of the County makes service by public transit a challenge. As such, individuals requiring regular services (health care, groceries, pharmacy, work travel, etc.) must live close to these amenities. This further strains the housing markets in the County's more densely developed areas; particularly Geneseo. Transportation barriers are mitigated in part by RTS Livingston bus service routes, the ridelivingston.com tool that allows passengers to specify ride features needed for a disability, and transportation services provided by the Arc of Livingston-Wyoming to its clients. Appendix 3 contains municipal maps of housing and services, including RTS bus routes in relation to retail and housing.
- *Family Support:* Many agency clients maintain close family connections in the County. As such, clients are seeking to be located close to their existing family network. This means either dealing with the significant cost differential in the northern County, or dealing with a lack of available housing in the southern County.
- *Disparate Nature of Information on Rental Vacancies:* Several agencies suggested difficulty in locating available rental units for clients. They use informal networks and "go to" complexes to get quick results, but suggested a more formal, digital clearinghouse could support ease of placement.
- *Client Financial Issues:* Many clients in transition are saddled with issues from their past, including poor credit, evictions, lack of good references, a criminal history, or inability to provide a security deposit. Agencies have become resourceful at addressing cash flow and resource issues (security deposit, utility connections, etc.), but are at the mercy of local landlords with respect to other issues.



Livingston County Housing Needs Assessment & Market Analysis

Chapter 2: Demographic & Economic Data

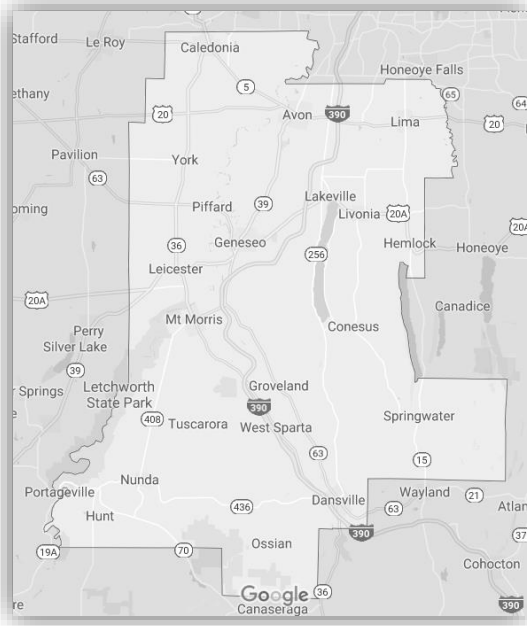
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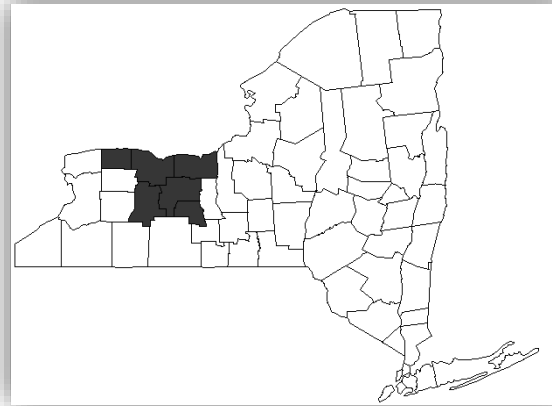
Geographies Studied

In the following sections of this report, Livingston County data is compared with benchmark data for the larger Rochester Metropolitan Statistical Area (MSA), which is composed of seven counties including Livingston. This provides context by illustrating demographic and economic differentials between Livingston County and the larger region to which it is closely economically tied. Additionally, selected data is provided for subdivisions (Towns, Villages) of Livingston County.

Livingston County



Rochester MSA (Livingston, Monroe, Orleans, Wayne, Ontario, and Yates Counties)



Overview

Overall, Livingston County has households of slightly smaller size than the Rochester MSA, at 2.38 people per household, and with slightly lower median income at \$53,654. The median age of Livingston County residents, at 40.4, is slightly higher than Rochester MSA residents.

Table 1. 2018 Demographic Profile		
	County	MSA
Population	63,660	1,077,180
Households	24,432	431,327
Average Household Size	2.38	2.41
Median Age	40.4	39.4
Median Household Income (2017)	\$53,654	\$55,256

Sources: Ensi, American Community Survey, 2010 Census

Population

The population of Livingston County has grown steadily in recent decades, and is projected to grow modestly from 2020-2050, by 2.8%. The municipalities that are expected to experience the greatest population growth during that period are the Village of Geneseo (7.5%, partly attributable to the presence of SUNY Geneseo), Village of Avon (7.2%), Town of Livonia (6.7%), Town of Geneseo (6.5%), and Town of Springwater (6.4%). Please note that these calculations for the towns exclude the village populations within them.

Meanwhile, municipalities whose populations are expected to experience notable declines include the Town of Groveland (12.9%) and the Town of Caledonia (7.1%).

Table 2. Historic and Projected Population

							2020-2050	
	2000	2010	2020	2030	2040	2050	# Change	% Change
Livingston County	64,328	65,393	66,179	66,887	67,501	68,043	1,864	2.8%
Town of Avon	3,466	3,770	3,675	3,755	3,824	3,885	210	5.7%
Town of Caledonia	2,240	2,054	2,091	2,035	1,986	1,942	(149)	(7.1%)
Town of Conesus	2,353	2,473	2,506	2,564	2,615	2,660	154	6.1%
Town of Geneseo	2,075	2,452	2,216	2,271	2,318	2,360	144	6.5%
Town of Groveland	3,853	3,249	3,418	3,252	3,107	2,978	(440)	(12.9%)
Town of Leicester	1,818	1,732	1,923	1,963	1,998	2,028	105	5.5%
Town of Lima	2,082	2,166	2,178	2,215	2,247	2,276	98	4.5%
Town of Livonia	5,913	6,400	6,334	6,496	6,635	6,759	425	6.7%
Town of Mount Morris	1,301	1,479	1,323	1,332	1,339	1,346	23	1.7%
Town of North Dansville	906	819	938	950	961	970	32	3.4%
Town of Nunda	1,687	1,687	1,767	1,797	1,823	1,847	80	4.5%
Town of Ossian	751	789	793	808	823	835	42	5.3%
Town of Portage	859	884	880	887	895	901	21	2.4%
Town of Sparta	1,627	1,624	1,714	1,747	1,775	1,801	87	5.1%
Town of Springwater	2,322	2,439	2,478	2,538	2,590	2,636	158	6.4%
Town of West Sparta	1,244	1,255	1,311	1,337	1,360	1,379	68	5.2%
Town of York	3,219	3,397	3,312	3,347	3,378	3,405	93	2.8%
Village of Avon	2,977	3,394	3,207	3,294	3,370	3,438	231	7.2%
Village of Caledonia	2,327	2,201	2,376	2,395	2,410	2,425	49	2.1%
Village of Dansville	4,832	4,719	4,753	4,723	4,697	4,673	(80)	(1.7%)
Village of Geneseo	7,579	8,031	8,159	8,382	8,574	8,774	615	7.5%
Village of Leicester	469	468	482	487	491	495	13	2.7%
Village of Lima	2,459	2,139	2,318	2,263	2,216	2,175	(143)	(6.2%)
Village of Livonia	1,373	1,409	1,434	1,456	1,477	1,494	60	4.2%
Village of Mount Morris	3,266	2,986	3,250	3,244	3,238	3,233	(17)	(0.5%)
Village of Nunda	1,330	1,377	1,343	1,349	1,354	1,358	15	1.1%

Source: Genesee/Finger Lakes Regional Planning Council "Regional Population Forecasts;" U.S. Census Bureau

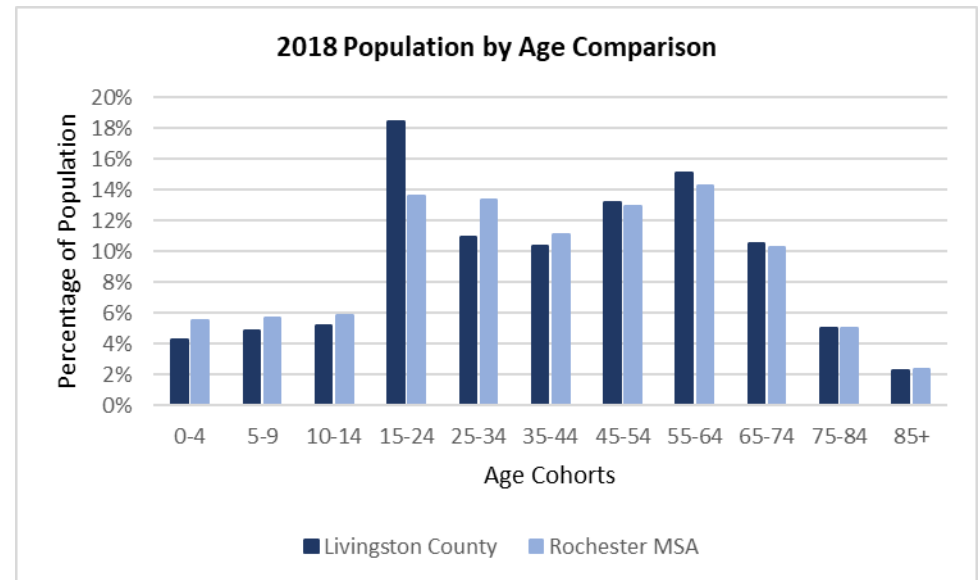
Note: Town figures do NOT include village population.

Population by Age

Table 3 and the accompanying bar graph show that Livingston County has a similar age distribution compared to the larger Rochester MSA. A notable difference is that the County has a significantly higher percentage of people aged 15-24 (18%, as compared to the MSA's 14%, partly attributable to the SUNY Geneseo population), and slightly lags the MSA in the 25-34 cohort. The County has a proportionate number of young children, infants, and elderly residents as compared to the MSA.

	County		MSA	
	#	%	#	%
0-4	2,739	4%	59,182	5%
5-9	3,109	5%	61,148	6%
10-14	3,295	5%	63,124	6%
15-24	11,737	18%	146,732	14%
25-34	6,942	11%	143,948	13%
35-44	6,578	10%	119,866	11%
45-54	8,365	13%	139,420	13%
55-64	9,581	15%	153,324	14%
65-74	6,667	10%	110,576	10%
75-84	3,216	5%	54,118	5%
85+	1,430	2%	25,742	2%
Total Population	63,660		1,077,180	

Source: Emsi



Population by Race

Livingston County is less racially diverse than the Rochester MSA, with 93% of residents identifying as White Alone, as compared to 82% in the MSA. Three percent of the County's residents identify as Black Alone, as compared to 12% of MSA residents.

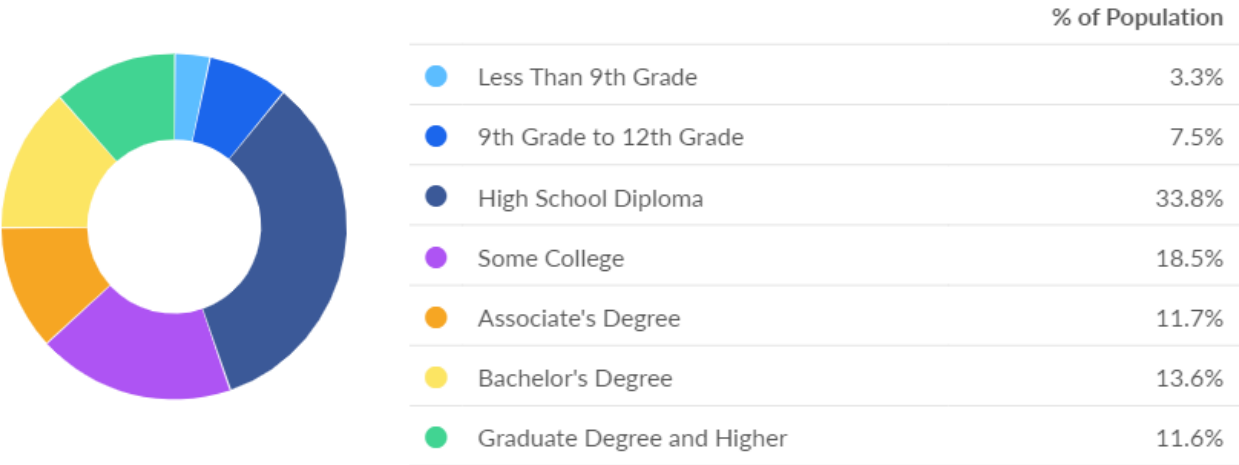
Table 4. 2018 Population by Race				
	County		MSA	
	#	%	#	%
White	59,451	93%	879,914	82%
Black	1,973	3%	132,728	12%
American Indian or Alaskan Native	236	0%	4,526	0%
Two or More Races	1,046	2%	26,256	2%
Asian	921	1%	33,077	3%
Native Hawaiian or Pacific Islander	33	0%	681	0%

Source: Emsi

Educational Attainment

Percentages of Livingston County residents attaining higher educational milestones is below that of the region. Livingston ranks lower than the Rochester MSA in terms of higher education degrees. However, a much greater proportion of Livingston County residents hold a high school diploma (33.8%) than the MSA and national averages of about 27%, in part attributable to the number of high school graduates attending SUNY Geneseo.

Overall, 13.6% of County residents possess a Bachelor's Degree, 5% below the MSA average and the national average. Nearly 12% hold an Associate's Degree (equal to the MSA average, and nearly 4% above the national average). The 11.6% percent of the County's population that holds a graduate degree or higher is similar to the national figure, but below the 14.4% MSA average.



Employment

From 2013 to 2018, jobs increased by 2.5% in Livingston County from 22,530 to 23,100. This change fell significantly short of the national growth rate of 8.5%. As the number of jobs increased, the labor force participation rate (the percentage of working age people who are employed or actively seeking work) decreased slightly to 57.1% between 2013 and 2018. 1,257 residents of Livingston County were unemployed in 2018, meaning they were considered to be part of the labor force but specific efforts to find employment were unsuccessful. Between 2018-2023, Livingston County is expected to gain 875 net new jobs, primarily in the health care, social assistance, and construction industries.

Table 5. Labor Force and Jobs in 2018		
	County	MSA
Working Age Population	54,517	893,727
Labor Force	31,154	522,938
<i>Employed</i>	<i>29,897</i>	<i>502,025</i>
<i>Unemployed</i>	<i>1,257</i>	<i>20,913</i>
Not In Labor Force (15+)	23,363	370,789
Jobs	23,100	548,350

Source: Emsi

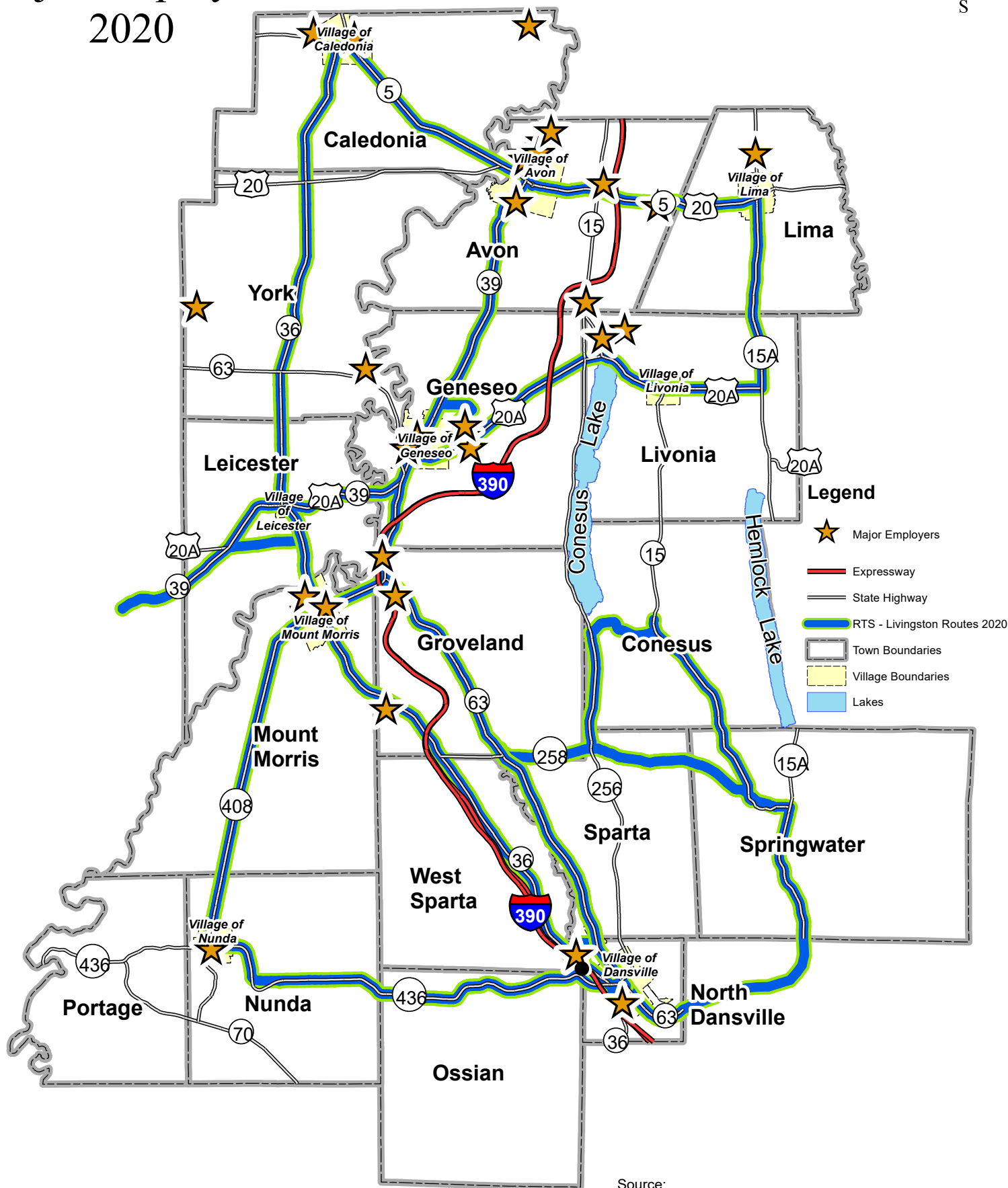
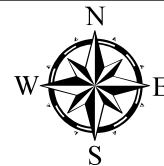
Major employers in Livingston County include SUNY Geneseo, correctional facilities,¹ the University of Rochester (Noyes Memorial Hospital), and Kraft Foods, as show in Table 6. The map on the following page illustrates the distribution of key employers in relation to transportation routes and transportation services.

Table 6. Major Employers in Livingston County	
Employer	Jobs
Livingston County Government	1,257
SUNY Geneseo	1,064
NYS Correctional Facilities	711
Noyes Memorial Hospital	591
Kraft Foods North American	400
Coast Professional Inc.	389
American Rock Salt	370
Livingston Associates	361
Wegmans	326
Hilltop Industries (operated by Arc of Livingston-Wyoming)	325
Star Headlight	215
NYS Department of Environmental Conservation	200
Gray Metal Products	190
Walmart Stores	175
Barilla America	138
Arkema	118

Source: Livingston County Office of Economic Development. Note: These are best available estimates based on data provided in the course of active or past economic development projects.

¹ The correctional facilities employment figure is inflated, as it does not account for the 2019 closure of the Livingston Correctional Facility.

RTS-Livingston Major Employers 2020



0 5 10 Miles

Source:
Livingston County Economic Development Office, 2019
RTS, 2020

Map prepared by the Livingston County Planning Department: Jan. 2020
M:\ARCVIEW\Housing Task Force Maps\2020\lats_majoremployers2019.mxd

Of Livingston County's 23,100 jobs in 2018, over 6,500 were in the Government sector, nearly double the rate of the national average. This figure includes significant employment in public schools and public higher education institutions. Retail Trade was the next largest category of employment, at over 2,500 jobs, followed by Health Care and Social Assistance (2,378), Accommodation & Food Services (2,182), and Manufacturing (2,045).

Table 7. 2018 Employment by Industry		
NAICS	Description	2018 Jobs
90	Government	6,507
44	Retail Trade	2,537
62	Health Care and Social Assistance	2,378
72	Accommodation and Food Services	2,182
31	Manufacturing	2,045
23	Construction	1,352
81	Other Services (except Public Administration)	1,217
11	Agriculture, Forestry, Fishing and Hunting	988
56	Administrative and Support and Waste Management and Remediation Services	771
42	Wholesale Trade	660
54	Professional, Scientific, and Technical Services	455
48	Transportation and Warehousing	413
21	Mining, Quarrying, and Oil and Gas Extraction	355
52	Finance and Insurance	293
71	Arts, Entertainment, and Recreation	241
51	Information	233
53	Real Estate and Rental and Leasing	203
61	Educational Services	128
55	Management of Companies and Enterprises	70
22	Utilities	63
99	Unclassified Industry	10
	Total	23,100

Source: Emsi Q3 2019 Data Set

Poverty, Homelessness, and Special Populations

Poverty

As shown in Table 8, across Livingston County, 9.8% of residents live below the poverty level, nearly equivalent to the poverty rate across the larger MSA. Concentrations of poverty are found in the villages of Geneseo (41.4%), Mount Morris (30.5%), Nunda (28.8%), Village of Dansville (25.5%), and Town of North Dansville (22.9%, which is inclusive of the village data).

Table 8 also shows the percentage of families that have children *and* live below the poverty level. In addition to the communities noted above as having relatively high general poverty rates, there are high concentrations of such households in the Towns of Mount Morris, Nunda, and West Sparta.

Communities with the highest percentage of residents receiving food stamp benefits are the Village of Dansville, Town of North Dansville, Village of Nunda, Village of Mount Morris, and Town of Portage.

The communities with relatively high density of impoverished residents may face a greater need for affordable housing solutions as the County seeks to leverage limited resources to implement fair housing policies.

Table 8. Concentrations of Poverty & Public Assistance

Town	% of Residents Below Poverty Level	% of Families with Children Under 18 Living Below Poverty Level	% of Households Receiving Food Stamps/SNAP
Livingston County	9.8%	17.6%	13.5%
Rochester MSA	10.0%	17.9%	14.1%
Town of Avon	7.2%	9.3%	11.9%
Town of Caledonia	2.8%	5.3%	7.6%
Town of Conesus	6.1%	9.2%	8.8%
Town of Geneseo	12.2%	18.9%	10.7%
Town of Groveland	4.0%	7.7%	10.9%
Town of Leicester	4.2%	8.9%	12.3%
Town of Lima	7.1%	15.0%	8.2%
Town of Livonia	7.1%	14.7%	11.8%
Town of Mount Morris	18.8%	31.4%	20.0%
Town of North Dansville	22.9%	40.3%	31.1%
Town of Nunda	11.7%	24.0%	13.5%
Town of Ossian	1.3%	2.9%	4.4%
Town of Portage	11.0%	15.0%	21.1%
Town of Sparta	3.8%	6.3%	8.0%
Town of Springwater	8.2%	19.1%	12.8%
Town of West Sparta	12.7%	23.3%	15.2%
Town of York	9.4%	12.6%	9.0%
Village of Avon	11.9%	19.3%	12.7%
Village of Caledonia	7.7%	10.9%	10.4%
Village of Dansville	25.5%	39.5%	33.5%
Village of Geneseo	41.4%	25.6%	17.5%
Village of Leicester	3.7%	0.0% *	7.6%
Village of Lima	14.5%	20.1%	11.8%
Village of Livonia	13.0%	14.4%	17.8%
Village of Mount Morris	30.5%	39.3%	21.8%
Village of Nunda	28.8%	49.4%	22.7%

Source: 2017 American Community Survey 5-Year Estimates (Past 12 Months). Note: Town data DOES include village data for this table.

*High margin of error noted for this Village of Leicester entry

Homelessness

As of Livingston County's annual Point-in-Time (PIT) homelessness count on January 30, 2019, 52 people or 32 households were identified as homeless. Of those 52 individuals, about half were over the age of 24, while 19 were children (under the age of 18). All but two individuals were considered sheltered, in emergency housing.

Table 9. Point-In-Time Homelessness & At-Risk Count (1/30/2019)		
	Homeless	At-Risk
Households	32	61
Individuals	52	110
<i>Children (under 18)</i>	<i>19</i>	<i>47</i>
<i>Persons Aged 18-24</i>	<i>4</i>	<i>8</i>
<i>Persons Aged 25+</i>	<i>29</i>	<i>55</i>

Special Populations

Additionally, the following special populations have specific housing challenges and needs that the County seeks to address.

- *Individuals with disabilities:* Livingston County is home to 8,142 people with disabilities. About half of the people in homes operated by the Arc of Livingston-Wyoming could and should be living independently, but there are very long wait lists (1-2 years) for accessible, safe rental units.
- *Victims of domestic violence:* Such victims often require temporary housing and a range of assistance to transition out of their former living arrangements.
- *Residents suffering from substance abuse issues:* The complete absence of longer-term supportive housing for those with substance abuse issues puts clients of agencies like CASA at risk of incomplete treatment and relapse, unless they are willing and able to move out of the County to locations like Hornell and Bath. Many CASA clients exiting treatment have limited work history, require access (transportation) to services, and need 1-2 bedroom units, as many have some family in their households. When suitable housing is not found, homelessness is then a major driver of relapse.
- *Elderly:* 11,313 of Livingston County's residents are aged 65+ and require varying degrees of care. Lack of accessibility modification in older homes is a safety issue for elderly residents.
- *Veterans:* Livingston County is home to 4,239 veterans. As of the 2019 PIT count, just one homeless person was identified as a veteran. Veterans with service-related disabilities may require accessible housing units and greater access to medical services, similar to the senior demographic.
- *Parolees and probationers:* Many such residents require access to services in Geneseo, Mount Morris, or Dansville, such as mental health counseling, substance abuse treatment, and employment services, but housing in Geneseo is typically unaffordable. There is a lack of affordable rental properties in the County whose landlords accept convicted felons. Restrictions on living with other ex-offenders places an additional barrier on these individuals in seeking stable housing. As of January 2020, there were 395 adult probationers in Livingston County.²

² Recent criminal justice reforms may have as-yet-unclear consequences for the number of probationers and parolees living in communities in Livingston County, according to the Livingston County Probation Department.



Livingston County Housing Needs Assessment & Market Analysis

Chapter 3: Housing Stock, Trends, & Projections

Prepared by:

MRB | *group*

Current Housing Inventory

As of the American Community Survey 2013-2017 five-year estimates, Livingston County, New York had a total of 27,427 housing units, 89 percent of which were occupied. Of these housing units, 71 percent were single-family houses either not attached to any other structure or attached to one or more structures (commonly referred to as “townhouses” or “row houses”). Nineteen percent of the housing units were located in multi-unit structures, or those buildings that contained two or more apartments (i.e., not a single-family home or mobile home). Ten percent were mobile homes. The median number of rooms in all housing units in Livingston County was 6.0 rooms, and of these housing units, 66 percent had three or more bedrooms.

Of the occupied housing units, the percentage of these houses occupied by owners (also known as the homeownership rate) was 73 percent; the median value of these owner-occupied housing units was \$125,000. Renters occupied the other 27 percent of housing units. The average household size of owner-occupied houses was 2.5, and in renter-occupied houses it was 2.1.

About eight percent of householders of these occupied houses had moved into their house since 2015, while twelve percent moved into their house in 1979 or earlier. Households without a vehicle available for personal use comprised eight percent, and another 21 percent had three or more vehicles available for use.

Livingston County's housing occupancy rate of 89% is on par with regional, statewide, and national rates. The portion of the housing stock that is single-family homes (71%) is identical to that of the larger Rochester Metropolitan Statistical Area (MSA), and much larger than that of New York State and the United States. The portion of the housing stock that is mobile homes is significantly larger than those comparison geographies, and the percentage of housing units that are within apartment complexes is significantly lower, as would be expected due to its rural nature.

In comparison with the Rochester region, New York State, and the nation, Livingston County has a much higher rate of owner-occupied housing (73% as compared to 67% in the MSA, 54% in New York State, and 64% nationwide). Its housing stock is about 13 years older than the national median age, but has the same median housing age as the larger Rochester region. The median value of Livingston County's owner-occupied housing units is significantly lower (\$125,000) than the comparison geographies. Since the County's housing stock is no older than the metro area's, and younger than New York State's, the relatively low median housing value is attributable not to issues with the condition of housing but to the County's rural nature and moderate distance from the major employment center of Rochester.

Table 10 below summarizes this information and highlights data points for which Livingston County metrics differ significantly from those of the region.

Table 10. Summary of Housing Stock

	Livingston County	Rochester Metropolitan Statistical Area	New York State	United States
# of Housing Units	27,427	477,179	8,255,911	135,393,564
% of Housing Units Occupied	89%	90%	88%	88%
% of Housing Units Vacant	11%	10%	12%	12%
Type of Housing Units				
Single-Family Houses	71%	71%	47%	68%
Apartments in Multi-Unit Structures	19%	26%	51%	26%
Mobile Homes	10%	3%	2%	6%
Median # of Rooms in All Housing Units	6.0	5.9	5.0	5.5
% of Housing Units Owner-Occupied	73%	67%	54%	64%
Median Value of Owner-Occupied Housing Units	\$125,000	\$138,300	\$293,000	\$193,500
Median Year Structure Built	1964	1964	1956	1977

Sources: ACS 2013-2017 5-Year Estimates

*Note: Later in this analysis, county tax parcel data shows that structures on Livingston County residential parcels have a median age of 61. In this discrepancy, tax parcel data should be considered more accurate than this ACS estimate of 55, however the ACS estimate is provided here in order to enable comparison to other geographies.

Housing Stock by Dwelling Type and Age: Countywide

In order to further understand current housing inventory, MRB Group reviewed 2019 County tax parcel data. Therefore, the data in this and subsequent tables is based on an analysis of residential parcels with dwelling structures on them, rather than the “housing units” referred to in the preceding section. There are less residential parcels (20,308) than housing units in Livingston County, as parcels may contain multi-family residences or multiple mobile homes, for example.

Table 11 shows the various types of dwellings in order of prevalence throughout the County, as determined based on property classification codes.¹ Over 88% of the residential parcels are either one family year-round residences, rural residences with acreage, or mobile homes. The remainder are multi-family residences, seasonal residences, farm houses, apartment complexes, row-type housing, and other types of buildings used for residential purposes. Hotels and motels are included in this analysis, as they are sometimes used for transitional or emergency housing purposes. The map on the following page shows illustrates the distribution of dwelling types across the County.

Table 11. Countywide Housing Stock By Dwelling Type

Dwelling Type	#	%
One Family Year-Round Residence	15,664	77.1%
Rural Residence with Acreage	1,186	5.8%
Mobile Home	1,059	5.2%
Two Family Year-Round Residence	688	3.4%
Seasonal Residences	431	2.1%
Primary residential, also used in agricultural production	254	1.3%
Apartments	218	1.1%
Recreational Use	171	0.8%
Downtown Row Type (with common wall)	141	0.7%
Three Family Year-Round Residence	126	0.6%
Downtown Row Type (detached)	113	0.6%
Residential - Multi-Purpose/Multi-Structure	57	0.3%
Mobile Home Parks (trailer parks, trail courts)	48	0.2%
Converted Residence	38	0.2%
Residence with Incidental Commercial Use	23	0.1%
Inns, Lodges, Boarding/Rooming/Tourist/Fraternity/Sorority Houses	21	0.1%
Multiple Residences	16	0.1%
Resident (Vacant)	16	0.1%
Multiple Mobile Homes	11	0.1%
Hotel	8	<0.1%
Motel	8	<0.1%
Homes for the Aged	6	<0.1%
Estate	5	<0.1%

Source: 2019 County Tax Parcel Data

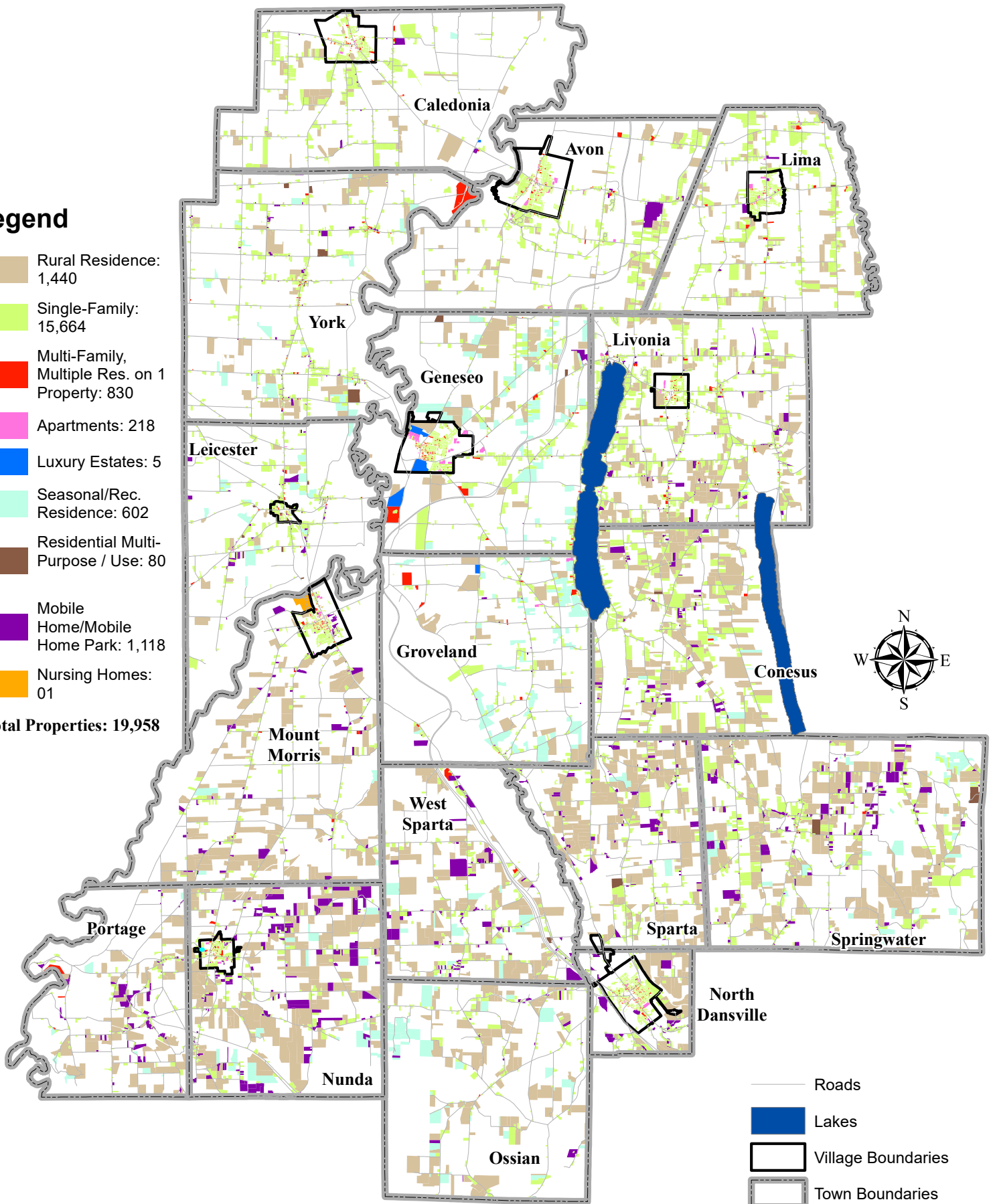
¹ The “dwelling type” classifications used in the County’s tax data are defined by the New York State Office of Real Property Services. Assessors record the best description of the overall use of a particular parcel. “Rural residence with acreage” is a year-round residence with 10 or more acres of land. “Multiple residences” refers to more than one residential dwelling on one parcel, and are typically a mixture of one-, two-, or three-family year-round residences. A “converted residence” is a building usually located in a residential area, which has been partially converted or adapted for office space (e.g., a doctor’s office with an apartment upstairs). Appendix 1 contains additional definitions.

Livingston County Housing by Type, 2019

Legend

- Rural Residence: 1,440
- Single-Family: 15,664
- Multi-Family, Multiple Res. on 1 Property: 830
- Apartments: 218
- Luxury Estates: 5
- Seasonal/Rec. Residence: 602
- Residential Multi-Purpose / Use: 80
- Mobile Home/Mobile Home Park: 1,118
- Nursing Homes: 01

Total Properties: 19,958

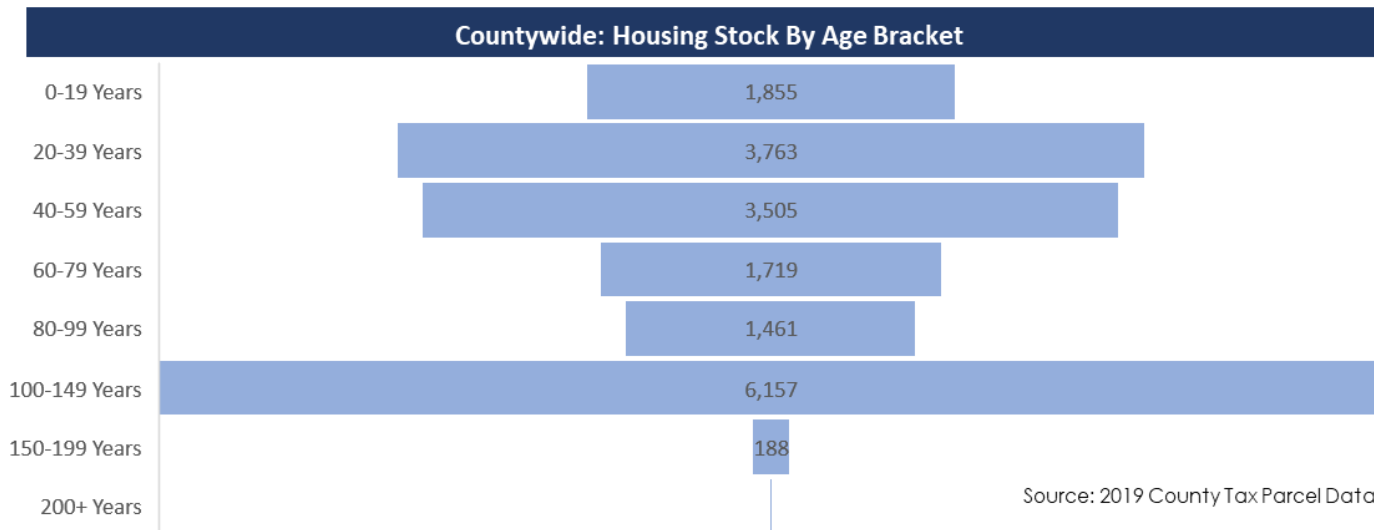


The median age of the housing structures on Livingston County residential parcels is 61 years. With just over half the County's housing structures aged 60 years or more, maintenance and energy inefficiency are significant factors in housing costs in the County. Thirty-four percent of the County's housing structures are 100 or more years old.²

Table 12. Countywide Housing Stock By Age Bracket

Age Bracket	#	%
0-19 Years	1,855	9.9%
20-39 Years	3,763	20.2%
40-59 Years	3,505	18.8%
60-79 Years	1,719	9.2%
80-99 Years	1,461	7.8%
100-149 Years	6,157	33.0%
150-199 Years	188	1.0%
200+ Years	17	0.1%

Source: 2019 County Tax Parcel Data



² Approximately 9,000 residential parcels, or 8%, lack year-built data. Furthermore, some year-built data appear to be estimates, with nearly a quarter indicating they were built in 1900.

Housing Stock by Dwelling Type, Age, and Value: Municipal Breakdown

The communities with the largest number of residential parcels are the Town of Livonia, Village of Dansville, Town of York, Town of Conesus, Village of Geneseo, Town of Springwater, and Village of Avon—all with over 1,000 residential parcels with dwelling structures on them.

In general, villages tend to have older housing stock than towns, as expected. The communities with the oldest housing stock are the Village of Mount Morris, Village of Nunda, Town of Portage, and Village of Dansville—each showing a median age of over 100 years.³ Municipalities with the youngest housing stock, all with a median age below 50 years, include the Town of West Sparta, Town of Caledonia, Town of Conesus, Town of Ossian, Town of Leicester, Town of Sparta, Town of Springwater, Town of Livonia, and Town of Avon.

The Town and Village of Geneseo have the highest median value of housing.⁴ The Village of Avon, Town of Livonia, Town of Groveland, and Town of Lima have the next-highest median values, all over \$145,000. Communities in the southern part of the County generally have lower median assessed values. The Village and Town of Mount Morris, Town of Portage, Village and Town of Nunda, Town of North Dansville, and Village of Dansville all have owner-occupied housing unit median values below \$90,000.

Tables 13 and 14 that follow provide more detail on housing stock age and value by municipality, and the map following Table 14 illustrates the age of housing stock throughout the County. A breakdown of dwelling types within each municipality is provided as Appendix 2.⁵

³ Note that three such communities show a median age of 119, reflecting an apparent use of 1900 as an estimate for houses whose build year was not known.

⁴ All median housing value data is for *owner-occupied housing* only, specifically single-family houses on less than 10 acres without a business office on the property. These data also exclude mobile homes.

⁵ In reviewing the housing stock by municipality, dwelling type data and age data for towns excludes parcels in the villages within those towns.

Table 13. Summary of Housing Stock By Municipality

Municipality	# of Residential Parcels	Median Age	Median Value of Owner-Occupied Housing
Town of Avon	947	48	\$142,300
Town of Caledonia	615	44	\$128,300
Town of Conesus	1,138	44	\$136,600
Town of Geneseo	970	54	\$170,600
Town of Groveland	614	69	\$145,900
Town of Leicester	537	46	\$108,400
Town of Lima	680	50	\$145,600
Town of Livonia	2,427	47	\$152,300
Town of Mount Morris	432	71	\$83,500
Town of North Dansville	269	59	\$85,200
Town of Nunda	675	56	\$89,900
Town of Ossian	353	45	\$110,100
Town of Portage	317	119	\$77,400
Town of Sparta	622	47	\$112,600
Town of Springwater	1,043	47	\$111,500
Town of West Sparta	491	44	\$91,800
Town of York	1,140	59	\$115,700
Village of Avon	1,016	89	\$154,300
Village of Caledonia	777	78	\$119,200
Village of Dansville	1,581	109	\$86,800
Village of Geneseo	1,049	59	\$162,600
Village of Leicester	179	66	\$110,600
Village of Lima	598	59	\$134,100
Village of Livonia	444	89	\$137,800
Village of Mount Morris	969	119	\$67,500
Village of Nunda	425	119	\$84,400

Sources: 2019 County Tax Parcel Data was used for age data above, as it can be assumed to be more accurate than 2017 ACS five-year estimates. However, for median home value, ACS 2013-2017 5-year estimates were used, as they're considered more accurate than parcel assessment values, and more comparable across communities.

Note: Median value ACS data for towns includes village units; parcel-derived data does not.

Note: All median housing value data is for owner-occupied housing only, specifically single-family houses on less than 10 acres without a business office on the property. These data also exclude mobile homes.

Table 14. Age of Housing Stock By Municipality

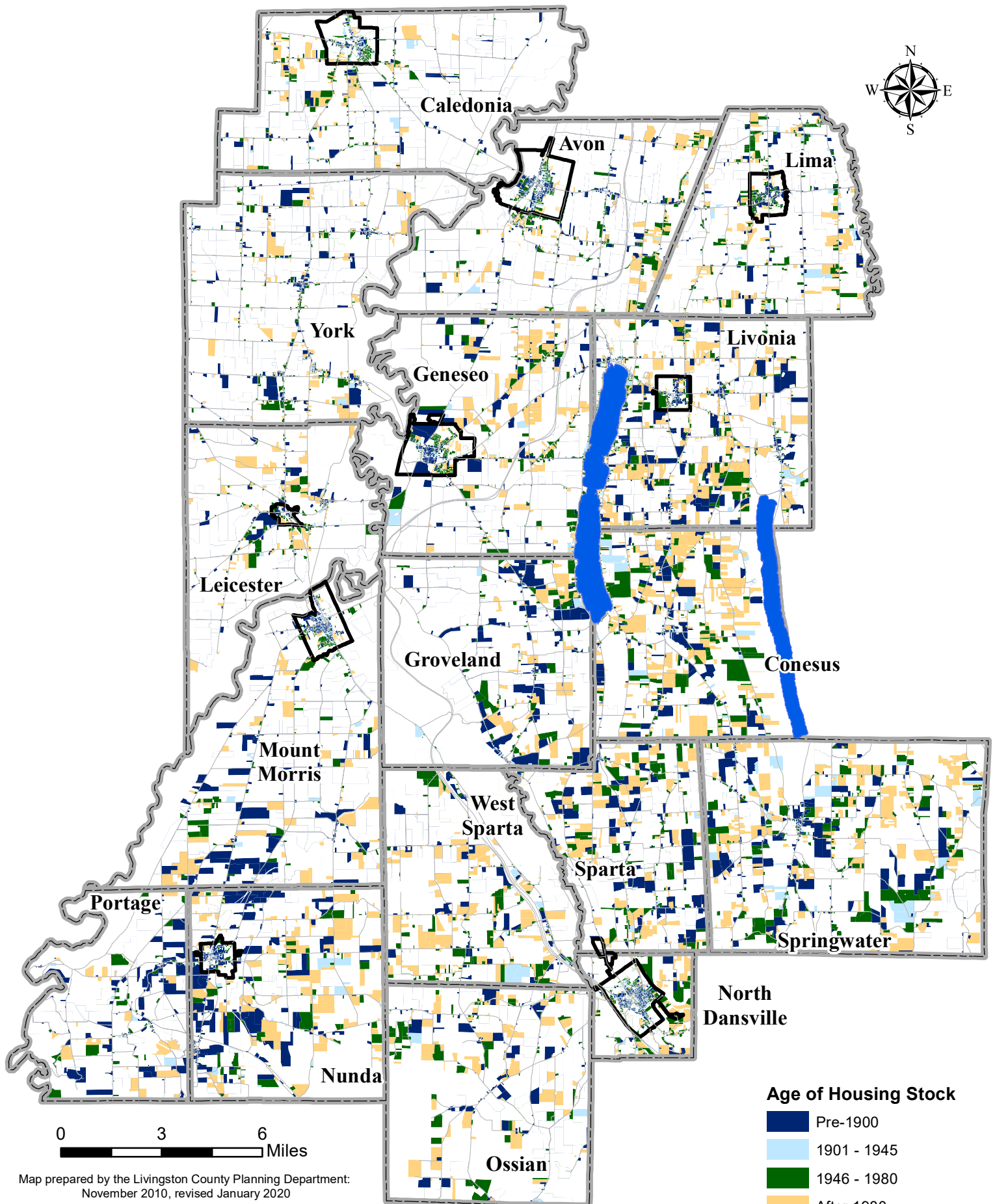
Municipality	Median Age	0-19 Years		20-39 Years		40-59 Years		60-79 Years		80-99 Years		100+ Years	
		#	%	#	%	#	%	#	%	#	%	#	%
Town of Avon	48	182	20.3%	186	20.7%	266	29.7%	78	8.7%	16	1.8%	169	18.8%
Town of Caledonia	44	51	7.4%	191	27.8%	189	27.6%	46	6.7%	11	1.6%	198	28.9%
Town of Conesus	44	135	13.9%	316	32.5%	195	20.1%	128	13.2%	87	9.0%	110	11.3%
Town of Geneseo	54	125	12.4%	232	22.9%	210	20.8%	106	10.5%	111	11.0%	227	22.5%
Town of Groveland	69	59	7.2%	108	13.2%	98	12.0%	64	7.8%	87	10.6%	401	49.1%
Town of Leicester	46	63	12.1%	125	24.0%	110	21.1%	27	5.2%	21	4.0%	175	33.6%
Town of Lima	50	69	12.7%	162	29.8%	173	31.9%	53	9.8%	29	5.3%	57	10.5%
Town of Livonia	47	296	15.4%	693	36.0%	308	16.0%	218	11.3%	258	13.4%	153	7.9%
Town of Mount Morris	71	32	6.6%	67	13.8%	76	15.7%	21	4.3%	12	2.5%	277	57.1%
Town of North Dansville	59	10	3.2%	48	15.4%	60	19.2%	42	13.5%	17	5.4%	135	43.3%
Town of Nunda	56	66	16.9%	124	31.8%	86	22.1%	12	3.1%	20	5.1%	82	21.0%
Town of Ossian	45	51	12.1%	92	21.9%	81	19.3%	17	4.0%	5	1.2%	174	41.4%
Town of Portage	119	22	7.1%	29	9.4%	35	11.3%	16	5.2%	10	3.2%	197	63.8%
Town of Sparta	47	65	11.8%	126	23.0%	127	23.1%	35	6.4%	19	3.5%	177	32.2%
Town of Springwater	47	99	9.0%	247	22.4%	168	15.2%	42	3.8%	36	3.3%	510	46.3%
Town of West Sparta	44	60	12.3%	127	26.1%	89	18.3%	20	4.1%	12	2.5%	179	36.8%
Town of York	59	100	11.8%	216	25.6%	238	28.2%	72	8.5%	65	7.7%	153	18.1%
Village of Avon	89	113	12.2%	93	10.1%	135	14.6%	131	14.2%	96	10.4%	356	38.5%
Village of Caledonia	78	11	0.9%	89	7.0%	156	12.2%	121	9.5%	80	6.3%	818	64.2%
Village of Dansville	109	23	2.7%	74	8.7%	119	14.0%	185	21.8%	237	27.9%	212	24.9%
Village of Geneseo	59	123	14.1%	124	14.2%	239	27.4%	67	7.7%	51	5.9%	267	30.7%
Village of Leicester	66	9	1.8%	29	5.7%	43	8.4%	10	2.0%	9	1.8%	409	80.4%
Village of Lima	59	47	10.6%	133	29.9%	107	24.0%	54	12.1%	11	2.5%	93	20.9%
Village of Livonia	89	25	8.6%	81	27.8%	57	19.6%	40	13.7%	18	6.2%	70	24.1%
Village of Mount Morris	119	8	0.9%	31	3.6%	119	13.8%	91	10.6%	107	12.4%	504	58.6%
Village of Nunda	119	11	3.0%	20	5.4%	21	5.7%	23	6.2%	36	9.7%	259	70.0%
Total		1,855	9.9%	3,763	20.2%	3,505	18.8%	1,719	9.2%	1,461	7.8%	6,362	34.1%

Source: 2019 County Tax Parcel Data

Note: Approximately 9,000 residential parcels, or 8%, lack year-built data. Furthermore, some year-built data appear to be estimates, with nearly a quarter indicating they were built in 1900.

Note: Highlighted cells indicate municipalities with the highest percentages of housing in that particular age bracket.

Age of Housing Stock, pre-1900 to 2006



Map prepared by the Livingston County Planning Department:
November 2010, revised January 2020

Source: Livingston County Real Property Tax Services tax parcel attributes, 2006
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Apartment Complexes (Multi-Family Properties)

Livingston County has about 61 multi-family apartment complexes⁶ totaling over 1,600 units. These are listed on Table 15 across the following pages, with data on number of units, year built, vacancy, unit asking price, and market segment. The Countywide vacancy rate stands at 4.4%, representing a relatively tight but stable market.

These tables generally exclude multi-family properties with less than four units, but in limited cases they may include mobile home parks. Additionally, they exclude nursing homes (the 266-bed Livingston County Center for Nursing and Rehabilitation) and adult care facilities (Alpine Manor in Lima and the assisted living portion of Morgan Estates in Geneseo).

Table 15. Multi-Family Properties in Livingston County

Municipality	Property Address	Property Name	# of Units	Year Built	Vacancy Rate	Avg. Ask/Unit	Rent Type & Market Segment
Town of Avon	6130 E Avon Lima Rd				0.0%		Market
Town of Caledonia	2314 Caledonia-LeRoy Rd		6	1980	0.0%		Market
Town of Conesus	5531 Cottonwood Dr		3	1950	0.0%		Market
Town of Conesus	6382 Cole Rd		26	1970	3.9%		Market
Town of Geneseo	4399 Clearview Dr	Morgan Estates Senior Apts.	64	2002			Senior
Town of Geneseo	4270 Hammocks Dr	The Hammocks at Geneseo	160	2014	6.3%	\$1,408	Market
Town of Leicester	5025 River Rd	Cuylerville Apartments	7	1960	0.0%		Market
Town of Leicester	2108 Leicester Rd	Gateway Apartments	~4				
Town of Lima	1458 Rochester St		6	1900 / 2014	0.0%		Market
Town of Lima	1173 York St		4	1980	0.0%		Market
Town of Lima	1177 York St		4	1980	0.0%		Market
Town of Livonia	3008 Plank Rd	(Mobile Home Park)		1991	6.3%		Market
Town of Livonia	701 Orchid Dr	Creekside Clearing	64		3.1%	\$644	Market/Affordable; Rent Restricted
Town of Livonia	5887 Big Tree Rd		3	1920	0.0%		Market
Town of Livonia	3195 Bronson Hill Rd		4		0.0%		Market
Town of Livonia	4586 Clay St		4	1950	0.0%		Market
Town of Livonia	4672 Main St		6	1960	0.0%		Market
Town of Livonia	5908 Stone Hill Rd		12	1927	0.0%		Market

Source: CoStar. Note: A second year-built entry refers to a renovation.

⁶ Here, apartment complexes refers to complexes of generally 4+ units; here, these may include units in duplexes within complexes of multiple duplex structures.

Table 15. Multi-Family Properties in Livingston County (Continued)

Municipality	Property Address	Property Name	# of Units	Year Built	Vacancy Rate	Avg. Ask/Unit	Rent Type & Market Segment
Town of North Dansville	7571 Dansville-Mt M. Rd			1990	0.0%		
Town of North Dansville	10053 Hornell Rd		4	1900	0.0%		Market
Village of Avon	597 Collins St	Avon Commons	128	2007 / 2017	3.9%	\$1,277	Market
Village of Avon	113 Avon on the Grn	Avon on the Green	35	1998	2.9%	\$652	Affordable; Rent Restricted; Senior
Village of Avon	158 Sackett Rd	Community Manor Apartments	32	1982	3.1%	\$490	Affordable; Rent Subsidized; Senior
Village of Avon	164 Sackett Rd	Community Manor Apartments II	24	1984	4.2%	\$766	Affordable; Rent Subsidized; Senior
Village of Avon	57 Genesee St		5	1900	0.0%		Market/Affordable
Village of Avon	61 Park Pl		17		0.0%		Market
Village of Caledonia	351 Leicester St	Caledonia Apartments	24	1989	4.2%	\$566	Affordable; Rent Subsidized
Village of Caledonia	3163 East Ave		4	1950	0.0%		
Village of Caledonia	3105 Main St		5		0.0%		Market
Village of Dansville	236 Main St	Faulkner Apartments	47		2.1%		Affordable
Village of Dansville	52 William St	Hammond Place Apartments	31		0.0%		Affordable
Village of Dansville	64 Plum Dr	Spring Creek Apartments					
Village of Dansville	103 Main St		8		0.0%		Market
Village of Dansville	115 Main St		11	1940	0.0%		Market
Village of Dansville	1 Park Hills Dr		32	1980	3.1%		Market
Village of Dansville	25 West Ave		6	1975	0.0%		Market
Village of Dansville	27 West Ave		4	1975	0.0%		Market
Village of Geneseo	28 Court St	Ambassador Apartments	76	2005	2.6%	\$3,151	Market
Village of Geneseo	80 April Way	April Meadows	24		4.2%		Affordable; Rent Restricted
Village of Geneseo	300 Laughlin Ln	Brookside	36	1982	11.1%	\$475	Affordable; Rent Subsidized
Village of Geneseo	42 Court St	Campus Crossing	20	1900	0.0%	\$1,451	Market

Source: CoStar. Note: A second year-built entry refers to a renovation.

Table 15. Multi-Family Properties in Livingston County (Continued)

Municipality	Property Address	Property Name	# of Units	Year Built	Vacancy Rate	Avg. Ask/Unit	Rent Type & Market Segment
Village of Geneseo	100 Clayton Hts	Clayton Heights Apartments	24		4.2%		Affordable
Village of Geneseo	100 Country Ln	Genesee Country Apartments	36	1983	5.6%	\$518	Affordable; Rent Subsidized
Village of Geneseo	5 Jacqueline Way	Geneseo Heights Apartments	110		3.6%	\$834	Market
Village of Geneseo	56 Megan Dr	Fox Run	32		3.1%		Affordable
Village of Geneseo	16 Mustang Cir	Skybird Landing	60	2019	0.0%		Affordable; Rent Restricted; Senior
Village of Geneseo	95 Meadow Dr	The Highlands Apartments	89	1979	1.1%	\$1,251	Affordable; Rent Subsidized
Village of Geneseo	600 Country Ln	Upper South St. Senior Housing	45	1983	0.0%	\$620	Affordable; Rent Subsidized; Senior
Village of Geneseo	24 Groveland Rd	Valley View Apartments	54		3.7%	\$674	Market
Village of Geneseo	18 Orchard St		16		6.3%		Market
Village of Geneseo	21 Orchard St		8		0.0%		Market
Village of Leicester	134 Main St		18	1980	88.9%		Market
Village of Lima	1632 Rochester St	Crossroads Village	36		2.8%		Affordable; Rent Restricted
Village of Lima	1992 Lake Ave	Lima Manor Apartments	32		3.1%		Affordable; Rent Restricted
Village of Lima	1868 Livingston St	Livingston Street Apartments	40	N/A	N/A	\$702	Market
Village of Lima	7042 W Main St	(Mobile Home Park)			0.0%		Market
Village of Livonia	5 Wildbriar Dr	Westview Hills	24		4.2%		Affordable; Senior
Village of Livonia	17 Wildbriar Dr.	Wildbriar Estates	48	2019	N/A	\$703	Affordable; Senior
Village of Livonia	62 Big Tree St		5	1920	0.0%		Market
Village of Mount Morris	1 Columbus Ave	Bellamy Hill Apartments	36	1990	0.0%	\$555	Affordable; Rent Subsidized
Village of Mount Morris	27 Eagle St		2	1900	0.0%		Market
Village of Mount Morris	7 Trumbell St		8	1910	0.0%		Market
Village of Mount Morris	14 E State St			1951	0.0%		
Village of Nunda	67 Mill St	Hillside Village Apartments			0.0%		Affordable; Rent Subsidized
Village of Nunda	101 Keating Ln	Nunda Village Apartments	24	1983	4.2%	\$956	Affordable; Rent Subsidized
Village of Nunda	9 4th St	Woodside Apartments	24		4.2%		Affordable; Rent Subsidized; Senior

Source: CoStar. Note: A second year-built entry refers to a renovation.

Utilities Service: Water⁷

Lack of public water service in the following municipalities is seen by municipal leaders and/or the County's water and sewer consultants as a constraint on further residential building on remaining developable land, or is a challenge for existing residences:

- Town of Caledonia.
- Town of Conesus outside the hamlet overlay district in the center of Town.
- Town of Geneseo, where approximately 60 percent of the population lacks public water.
- Town of Groveland, where approximately 85 percent of the population lacks public water.
- Town of Leicester, particularly on the west side of the Town. Public water would be needed for any development in the vicinity of Gibsonville Road and Perry Road, where existing residents struggle with bad wells and have to haul water. There are plans for the extension of water line along the northern half of Route 36 that could serve scattered site development. The Cuylerville Road area is mostly served by public water, and is a priority for getting public sewer, which could open up new lots.
- Town of Lima, where water availability suppresses some development, for example in the Chase Road area whose existing residents currently haul water; and in the Dalton Road area. Well water quality problems plague some neighborhoods. Also of note, a relatively dense development of homes on South Lima Road near Garden Street has great need for public water, and could be suffering from septic cross-contamination.
- Town of Mount Morris, as the 2020 water and sewer study notes that the Village system has little capacity during peak flows, raising concerns for any extensive future development in the Town. However, public water is already available for developable sites off Route 36 in the area of Begole Road.
- Town of Nunda, which has developable land is at a higher elevation than areas currently served by public water, and would therefore require costly infrastructure for pumping water uphill from the Village.
- Town of Ossian.
- Town of Portage.
- Town of Springwater.
- Town of West Sparta, which is primarily supplied from private sources, with the exception of a portion that is served by water from the Village of Dansville.

⁷ In analyzing the role that utilities availability has on constraining or enabling development activity, MRB Group interviewed municipal leaders and referenced draft materials from the County's 2020 water and sewer study.

The following municipalities have sufficient public water service for existing housing, and/or have not found that lack of public water is constraining further scattered site residential development (e.g. Towns whose remaining developable land would involve larger lot sizes amid agricultural uses):

- Town of Avon, which is partly served by public water, and private wells are generally successful.
- Town of Livonia, where public water could be extended from the industrial park in the Town's northwest corner to the proposed Gateway Road area, outside of which there is the potential for some residential development to complement the intended commercial and industrial development within the project area. However, the Pennamite Road and Cleary Road areas have no water service and significant difficulty with their wells, according to municipal leadership.
- Town of North Dansville, where existing water infrastructure could serve residential development in the vicinity of Perrys Way; County-owned land to the west of I-390 and to the north of Poags Hole Road; and an area of farmland near the airport.
- Town of Sparta, where water is available to enable further development in the hamlets of Scottsburg and Groveland Station.
- Town of York.
- Village of Avon.
- Village of Caledonia.
- Village of Dansville.
- Village of Geneseo.
- Village of Leicester, although high seasonal water use by food processing operations limits room for additional demand on the system.
- Village of Lima.
- Village of Livonia.
- Village of Mount Morris, as the 2020 water and sewer study notes that the Village system has little capacity during peak flows.
- Village of Nunda.

Although lack of public water does not generally preclude residential construction on larger lot sizes in the less-dense areas of the towns (e.g. Conesus), the need for a well increases building costs, and also may involve maintenance costs.

For more information, please see the 2020 countywide water and sewer study by CPL.

Utilities Service: Sewer and Wastewater

Approximately 40 percent of Livingston County residents are served by public sewer, and the remaining residents are served by private systems.

Lack of public sewer in the following municipalities is seen by municipal leaders and/or the County's water and sewer consultants as a constraint on residential building on remaining developable land:

- Town of Avon, much of which is not served by sewer, with the exception of larger subdivisions; and while the land is generally suitable for septic systems, some properties would be prevented from constructing them due to farmland protections.
- Town of Caledonia, which does not have any sewer and whose residents have opposed constructing it.
- Town of Conesus outside the hamlet overlay district in the center of Town.
- Town of Leicester, particularly on the east side. Leicester further stands out in its need for additional sewer because much land in the Town is not suitable for septic. A possible subdivision on 12-13 acres stalled due to lack of sewer. However, the Cuylerville Road area is a priority for getting public sewer, which could open up new lots.
- Town of Lima, where lack of water and sewer suppresses some development.
- Town of Ossian.
- Town of Portage.
- Town of West Sparta.
- Village of Lima, where sewer plant capacity limits new development, and a study is underway to determine remaining capacity as it relates to a proposed development.

The following municipalities are not considered to be particularly development-constrained due to sewer considerations:⁸

- Town of Geneseo.
- Town of Groveland.
- Town of Livonia.
- Town of Mount Morris.
- Town of North Dansville, where most remaining developable areas are served by sewer, with the exception of County-owned land to the west of I-390 and to the north of Poags Hole Road that could accommodate approximately twenty homes.
- Town of Nunda.
- Town of Sparta, where sewer is available to enable further development in the hamlets of Scottsburg and Groveland Station.
- Town of Springwater.

⁸ Municipalities are listed in this category either because most areas are served, or because the majority of remaining properties are designated for agricultural or residential development characterized by low residential density and large lot sizes, limiting the need for public sewer.

- Town of York. However, although most residences are served by public sewer, but wastewater treatment capacity may max out in coming years, limiting significant future development without upgrades.
- Village of Avon.
- Village of Caledonia.
- Village of Dansville.
- Village of Geneseo.
- Village of Leicester, which does not have sewer but has not dampened residential demand, and where sewer was resoundingly voted down.
- Village of Lima, although substantial additional development could require an increase in permitted capacity of the treatment facility.
- Village of Livonia, where sewer capacity would be sufficient to support new development in the West Avenue area and relatively easy to extend there.
- Village of Mount Morris.
- Village of Nunda.

Although lack of public sewer does not generally preclude residential construction on larger lot sizes in the less-dense areas of the towns, the need for a septic system increases building costs, and also involves maintenance costs.

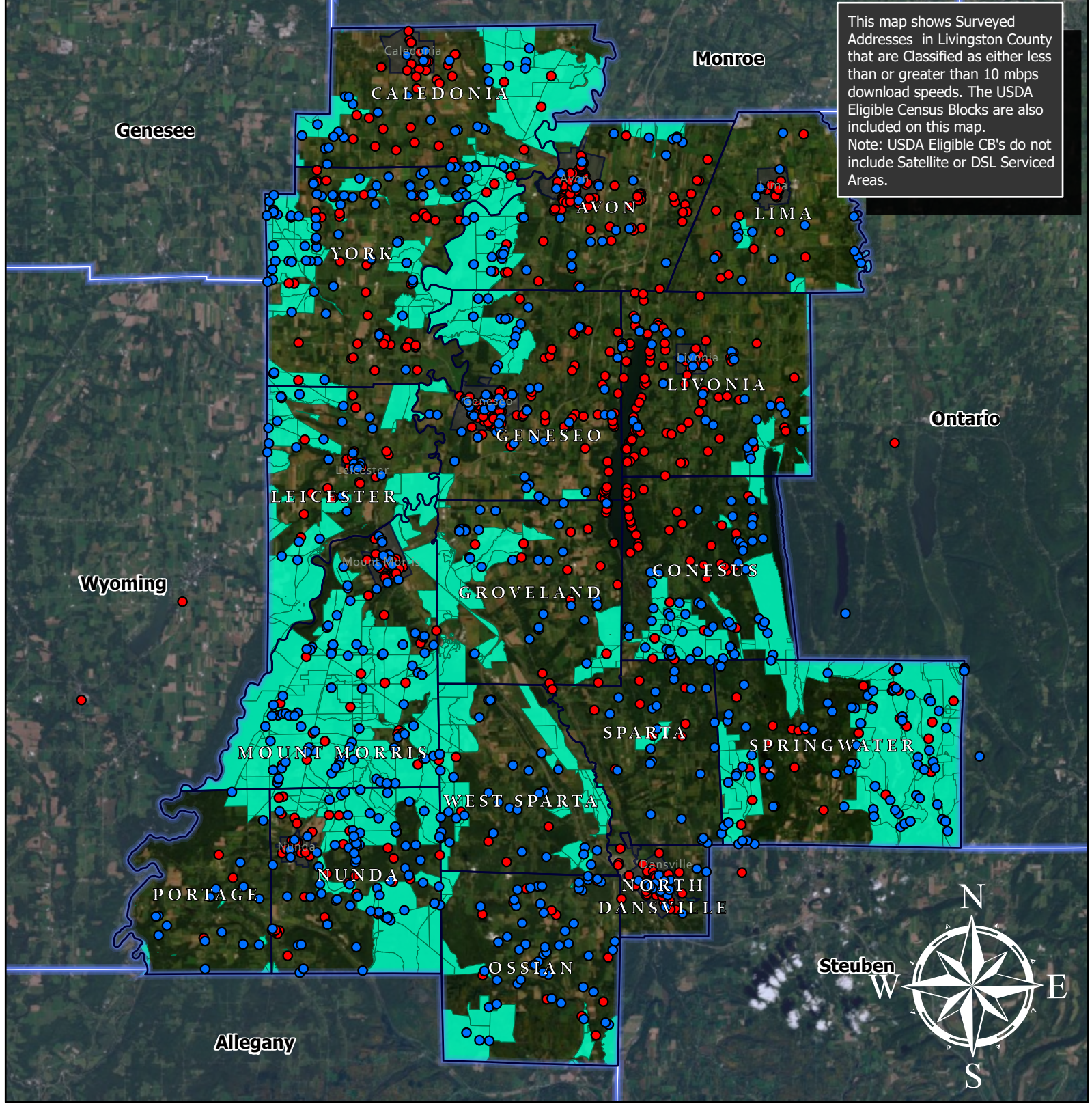
Any significant new industrial development in the County that requires addition of new water and sewer infrastructure could spur potential follow-on residential development on land newly served by such infrastructure.

For more information, please see the 2020 countywide water and sewer study by CPL.

Utilities Service: Broadband

Sixty-seven percent of the Census blocks in Livingston County enjoy 100+ Mbps internet service, as measured by download speeds.⁹ Livingston County's more densely populated communities receive the faster 1 Gbps internet service, with the exception of Caledonia. As existing and potential residents increasingly demand quality internet service for purposes of operating small businesses or working remotely, the County is embarking on a broadband initiative to set standards of bandwidth available in the County and to ensure access is available to its residents. The map on the following page shows surveyed addresses that are classified as having either less than or greater than 10 Mbps download speeds.

⁹ DRAFT Preliminary Engineering Report for Broadband Development in Livingston County, Hung Engineers, Architects, Land Surveyors & Landscape Architect DPC, November 2019. The areas identified as 100+ Mbps do not include areas served only by satellite providers, who may *advertise* this capability but effectively do not deliver it, per Hunt.



Surveyed Addresses for USDA Re-Connect

County of Livingston
HUNT Broadband Network Design
Livingston County



- SURVEYED ADDRESSES (BELOW 10 MBPS)
 - SURVEYED ADDRESSES (ABOVE 10 MBPS)
 - USDA ELIGIBLE
- Boundaries**
- Towns
 - Villages
 - Surrounding Counties

Other Services

Appendix 4 provides maps for each municipality illustrating the location of different housing types in the context of services such as transportation, grocery stores, and major employers.

Existing and Future Affordable Housing

Table 16 on the following page lists affordable multi-family (apartment) housing complexes in Livingston County, along with their location, number and type of units, year built or placed into service, vacancy rate, and average asking rent per unit. Units listed as “affordable” here mean they are made available to lower-income families at less than market value, typically having been developed with government subsidy. There are approximately 1,000 units in these complexes. The average vacancy rate is shown as 3.7%, which is considered low. Our research found that most of the complexes’ management companies maintain months-long waiting lists, and many developers have indicated that they see very high demand for additional units.

Scattered site affordable housing also exists in various communities, for example duplexes developed by the Genesee Valley Rural Preservation Council targeting those at risk of homelessness, and homes built by Habitat for Humanity.

In addition, the following dwellings serve as transitional or emergency housing:

- Catholic Charities operates two three-bedroom temporary shelters, one in Mount Morris and one in Dansville, that each house one family at a time.
- CASA Trinity operates a 25-bed residential facility in Dansville for those in treatment for chemical dependency. However, this is for short-term stays, and the County does not have longer-term residential facilities for such populations that are needed for ongoing treatment and relapse prevention; such people are often referred out of the County.
- Arbor Housing and Development operates short-term respite beds at residential sites in Livingston County.
- Chances & Changes operates a 12-bed transitional housing program at Jemison Place in Mount Morris for women and children who are homeless or at risk of homelessness, often victims of domestic violence, with a maximum stay of 18 months.
- The Arc of Livingston-Wyoming operates group homes for people with intellectual and developmental disabilities—two in Avon, one in Lakeville, four in Geneseo, and two in Dansville. The homes house between four and twelve people each. In some cases, placement in these residential facilities can be considered transitional for individuals who would be capable of independent living if provided with supportive services.
- In some cases, nursing homes serve as emergency or transitional housing for people with intellectual, developmental, or physical disabilities, where other supportive housing solutions would be more appropriate.
- Various motels in the County serve as temporary and emergency housing.

At this time, possible future subsidized housing developments include a proposed PathStone project in Lima of up to 60 apartments, and the potential redevelopment of the Kings Daughters Home in Dansville into multi-family units.

Table 16. Subsidized Housing Complexes in Livingston County

Municipality	Property Name	Address	# of Bedrooms per Unit	Elderly / Disabled?	# of Units	Year Built or Placed in Service	Vacancy Rate	Avg. Asking Rent/Unit
Town of Livonia	Creekside Clearing	104 Orchid Dr	2 & 3		64	2006	3.1%	\$644
Village of Avon	Avon on the Green	41 Prospect St	1		35	1999	2.9%	\$652
Village of Avon	Community Manor of the Genesee	158 Sackett Rd.	1 & 2	Yes	32	1982	3.1%	\$490
Village of Avon	Community Manor of the Genesee II	164 Sackett Rd.	1 & 2	Yes	24	1984	4.2%	\$766
Village of Avon	Hunter Hall*	Clinton St.	2 & 3		24	N/A	NA	N/A
Village of Caledonia	Caledonia Apartments	351 Leicester St	1 & 2		24	1989	4.2%	\$566
Village of Caledonia	Caledonia Partnership/Vlg Squire	3294 State St.	1	Yes	24	1988	N/A	N/A
Village of Dansville	Faulkner Apartments	236 Main St	1	Yes	47	1993	2.1%	N/A
Village of Dansville	Hammond Place	49 William Street	2 & 3		31	N/A	0.0%	N/A
Village of Dansville	Park Hills	52 William St.	2, 3 & 4		25	2007	N/A	N/A
Village of Geneseo	April Meadows	600 April Way	3		24	2000	4.2%	N/A
Village of Geneseo	Brookside	300 Laughlin Lane	1 & 2		36	1982	11.1%	\$475
Village of Geneseo	Clayton Heights	100 Clayton Hts	1	Yes	24	2006	4.2%	N/A
Village of Geneseo	Fox Run Apartments	56 Megan Dr	1	Yes	32	1998	3.1%	N/A
Village of Geneseo	Genesee Country Apartments	100 Country Lane	1, 2 & 3		36	1983	5.6%	\$518
Village of Geneseo	Highland Apartments	95 Meadow Dr.	2 & 3		89	1979/2011	1.1%	\$1,251
Village of Geneseo	Skybird Landing Apartments	16 Mustang Circle	1 & 2		60	2019	N/A	N/A
Village of Geneseo	Upper South St. Sr. Citizen Apts.	600 Country Lane	1	Yes	45	1983	N/A	\$620
Village of Lima	Lima Crossroads / Crossroads Village	1632 Rochester St.	1 & 2		36	N/A	2.8%	N/A
Village of Lima	Lima Manor Apartments	1992 Lake Ave	1 & 2		42	1989	3.1%	N/A
Village of Livonia	Westview Hills	5 Wildbriar Dr	1	Yes	24	1988	4.2%	N/A
Village of Livonia	Wildbriar Estates	17 Wildbriar Dr.	1 & 2	Yes	48	2019	N/A	\$703
Village of Mount Morris	Bellamy Hills Apartments	1 Columbus Ave.	1 & 2		36	1990	N/A	\$555
Village of Mount Morris	Mount Morris Country Estates	12 Columbus Ave	1	Yes	24	1999	N/A	N/A
Village of Nunda	Hillside Village Apartments	67 Mill St	1 & 2		22	2008	N/A	N/A
Village of Nunda	Nunda Villager	101 Keating Lane	2 & 3		24	1983	4.2%	\$956
Village of Nunda	Woodside Apartments	9 Fourth St	1	Yes	24	1992	4.2%	N/A
	GVRPC - Various Scattered	Various Scattered	1, 2 & 3		N/A	N/A	N/A	N/A

Sources: Livingston County Housing Assistance; U.S. Dept. of Housing and Urban Development (www.huduser.gov/portal/datasets/lihtc.html#data); CoStar

* Note: Hunter Hall is not listed as subsidized but appears on Livingston County Housing Assistance's list of low and moderate income housing

Proposed and Planned Units and Developments

The MRB Team reviewed permit data, spoke with elected municipal officials, and interviewed a number of developers to understand proposed and planned housing units and developments. The following planned, potential, or underway developments were considered notable by municipal leaders.

- In the Village of Lima, PathStone has proposed to develop the Cobble Stone Green apartment complex on nine acres of vacant land, potentially consisting of 60 apartments; if approved by the Village, this may come close to absorbing the community's remaining sewer capacity (a study is currently underway to determine this) and much of the remaining developable land.
- The proposed Gateway Road (or Gateway Park Road) project in the northwest quadrant of the Town of Livonia would open up significant acreage north of Route 20A to new development. Planning for this dates to the 1990s, for purposes of moving heavy trucks off residential roads and away from tight intersections. The land that would be opened up is currently zoned industrial, shopping center district, and transitional development, and it is presumed that some residential development could occur outside the edges of the project area if the community could interest a housing developer. Additionally, according to the Town of Livonia's comprehensive plan, "if the Gateway Park Road becomes successful, many of the industrial uses that are close to the core area of Lakeville may relocate, allowing those areas to redevelop into appropriately scaled commercial and residential uses."
- Discussions have taken place regarding the second phase of Avon Commons, in the Village of Avon behind the Tops grocery store. Local leadership estimates that the land could potentially accommodate 12-14 patio homes.
- Cedarwood Estates in the Village of Geneseo is now entering Phase III of single-family home development.
- In the Village of Mount Morris and the Village of Dansville, the O'Connell Organization has been buying and renovating a significant number of properties, which has resulted in a range of market rate second story apartments.
- In the Village of Mount Morris, a proposed new motel has been approved by the Village at 20 North Main Street.
- In the Town of Caledonia on Neil Road, a landowner has begun selling lots from a substantial parcel. The area consists of approximately nine lots, where buyers have been building relatively upscale homes, both ranch and two-story colonial styles.
- D'Angelo Parkway in the Village of Avon is seeing the completion of several higher-end homes (generally the mid to high \$200,000s).
- In the Village of Mount Morris, an R1-zoned area around Bonadonna Avenue has homes under development using BOCES for construction; the Village would encourage additional prime homes here.
- In the Town of Lima, a 7-house development is underway east of Dalton Road and north of Eastwood Drive, in an area that is served by water but not sewer. These homes are selling quickly in the \$230,000-\$400,000 range.
- The County-owned Kings Daughters Home property in Dansville has the potential to be renovated into rental units.
- One developer is considering a concept for a "pocket neighborhood"-type development in the Village of Geneseo, meaning a planned community of smaller single-family homes in close proximity to one another. While the developer did not provide more detail, such concepts are often designed around a communal space such as a courtyard or greenspace.

- The Livingston County Land Bank Corporation, having worked successfully with Habitat for Humanity on one project, is looking to expand that partnership to pursue additional residential co-development and redevelopment.

There have been multiple recent failed attempts to create non-market-rate housing developments, for example PathStone's proposed 75-unit development of workforce housing in the Village of Avon; and the CDS Monarch subsidized housing project for which the Town of Geneseo's wrote a letter of opposition to the project to the New York State. Similar or modified projects may therefore be proposed in the future to meet the demand that developers saw for these projects.

Developer Insights into Housing Market & Opportunities

MRB Group interviewed ten local and regional developers to gain their insights into the current housing market and market opportunities. The developers were a mix of non-profit organizations specializing in subsidized or supportive housing and for-profit developers of both affordable and market rate housing.

Developers stated that they would be motivated to pursue a project if an individual community came forward to:

- ✓ **express interest in a particular housing product**
- ✓ **provide information on their community plans and available land**
- ✓ **demonstrate that such land is zoned appropriately**
- ✓ **show willingness to try to secure a local financial commitment such as a PILOT.**

Nearly all developers see substantial demand for subsidized, affordable (non-market-rate) housing in Livingston County, and encouraged communities that desire such housing to demonstrate interest and provide information on suitably zoned available land. Additionally, developers noted that places like Avon, Livonia, and Geneseo could absorb larger subsidized projects, but observe that those communities have not demonstrated a commitment to such development; and that in smaller communities, smaller numbers of units would be more appropriate, but less financially feasible due to the structure of incentive programs. Developers also believe that it is critical to better educate and inform Livingston County communities about the nature and impact of modern subsidized housing developments.

Developers are also constrained by the changing nature of state and federal housing incentives. Federal programs that support construction of new units in rural areas, particularly the USDA Rural Development programs that have enabled most of the rental housing in the County over the past few decades, are no longer adequately funded.¹⁰ And

¹⁰ No new USDA direct-financed rental housing has been developed in years, and the existing properties are increasingly graduating out of their affordability provisions. "Rental Housing for a 21st Century Rural America," Housing Assistance Council, September 2018.

due to the limited amount of affordable housing in rural areas, residents who are displaced from their homes (which may occur in the future as rental units lose their affordability protections) could also be displaced from their communities.¹¹ While New York State has made special needs housing a considerable priority from a budget standpoint, programs favor 30-40+ unit developments that are not market-feasible in many of the County's rural communities. On the other hand, it should be noted that the Village of Mount Morris is designated as a federal Opportunity Zone, meaning that certain investors can benefit from capital gains tax relief by investing in real estate projects in the community, should a developer organize a project to attract Opportunity Zone capital.

In general, developers do not see substantial demand for large-scale development of market rate housing. Despite municipal leaders' observation that many senior residents of the County's smaller communities would be interested in downsizing into small single-family homes and senior living complexes, developers were skeptical that such residents would want or be able to transition to paying rent. However, developers believe that there is some market opportunity for new-construction single family homes under \$150,000 for rent or purchase by first-time homebuyers, where designated land uses allow. Additionally, there has been strong absorption of market rate apartments resulting from the renovation of vacant downtown units in areas like Mount Morris, where the O'Connell Organization bought and rehabilitated many downtown buildings and now rents renovated upper story apartments.

Developers consider market opportunities for subdivision-type developments to be limited by the remote locations of available land in the County, lack of utilities in many of those locations, and insufficient demand-driving factors like job growth and sought-after school districts. One such developer noted the difficulty of the development approval processes (from a political standpoint), the cost of new construction, and the slow absorption of more recent market-rate single family home developments.

¹¹ "Rental Housing for a 21st Century Rural America," by Corianne Scally, Brandi Gilbert, Carl Hedman, Amanda Gold, and Lily Posey. Urban Institute, October 2018.

Community Preferences for Development

MRB Group met with the supervisors and mayors of 22 of Livingston County's 26 municipalities, as well as a number of local code enforcement officers, to understand community preferences and readiness regarding residential development. The following are significant themes that were reflected in multiple communities interviewed.

Livingston County is predominantly rural and known for its natural beauty. Many municipalities self-identify as bedroom communities, recognizing that significant portions of their populations commute outside their community for work, and nearly half commute to neighboring counties.¹² Agricultural preservation is a priority in much of the rural area of the County, and many towns have larger lot size requirements to help preserve this character. The County is dotted with nine villages, more densely developed with older homes and rich history, and the Village of Geneseo's character is defined in part by the presence of SUNY Geneseo. The villages of Geneseo, Mount Morris, and Dansville have significant commercial and retail assets, such as visitor accommodations, dining, groceries, and entertainment venues; the villages of Avon, Caledonia, and Livonia have dining options and grocery or convenience stores; while the villages of Nunda, Lima, and Leicester have limited amenities.¹³ (Appendix 3 contains municipal maps that show the location of retail in relation to housing and transportation.) Conesus Lake has clusters of dense development, with many seasonal cottages, year-round residences, and an increasing number of high-end second homes built by people whose primary residence is not in Livingston County.¹⁴

Most communities with available land would like to see further residential development, particularly citing a need for more one-story, smaller homes to accommodate downsizing seniors within their town or village; and a need to be able to accommodate additional young families, whether in starter homes or in older single-family homes that do not have burdensome renovation needs. Most communities, particularly in the northern part of the County, feel that it is currently a seller's market, with relatively few homes going up for sale and those that are priced reasonably being bought immediately. However, a few communities do not view further residential development as a priority, either on the basis of lack of developable land (particularly in villages), a desire to retain rural character and agricultural production, contentedness with the current pace of development, or a lack of public interest in "growth for the sake of growth." Communities' comprehensive plans are the guiding documents for future growth in the context of local vision for development and community character.

¹² Livingston County Community Needs Assessment 2019-2021, page 19.

¹³ Livingston County Commercial District Assessment, 2017, <http://livingstoncountydevelopment.com/wp-content/uploads/2018/02/FINAL-COMPRESSED-commercial-district-assessment-1.pdf>.

¹⁴ Conesus Lake's residential development significantly impacts housing data for the Town of Livonia. 2,090 of the 3,401 housing units in the Town are in the Conesus Lake Census Designated Place, however only 60.7% of them are occupied, compared to the Countywide occupancy rate of 89%. The Town has 82 seasonal residences, comprising 3.4% of its dwellings, as compared to the countywide figure of 2.1%; and its median housing value is \$152,300, well above the countywide median of \$125,000.

Nearly all communities have observed that high costs of new construction are dampening the rate of new residential development, together with relatively high property tax rates. As a result, in communities that have seen new homes built in recent years, these are primarily manufactured or modular homes rather than stick-built. In many cases, remaining developable land is characterized by steep terrain or floodplain considerations that drive up costs further, or by agricultural designations. Another barrier is a lack of utilities in some of the undeveloped areas (see earlier section on Utilities Service). In many communities, recent residential development has happened at the hands of a local landowner seeking to divide and sell residential lots; complex development review processes, while necessary to ensure that development is aligned with community preferences, can be a deterrent to such actors.

Communities varied in their receptiveness to the question of siting any housing for special populations—those considered vulnerable from a housing standpoint, including individuals with disabilities, the elderly, residents suffering from substance abuse issues, victims of domestic violence, parolees, and probationers. Some believed that community opposition to housing for such populations would be strong; some would be supportive; said that the success of existing projects in their communities may provide a good foundation for more; and some noted that they don't believe they've ever been approached and are unsure how receptive residents would be.

Regarding the existing housing stock, most elected officials affirmed the fact that maintenance and upkeep of older homes places an increasing cost burden on residents, whether they are seniors aging in place or young families searching for starter homes. Most communities, however, feel that they have a manageable number of derelict or zombie properties, and their code enforcement activities are focused on a limited number of "bad actors." An exception is the Village of Dansville, where enforcement of property upkeep is "a constant fight." Communities report varying degrees of success in encouraging residents to leverage incentive programs for home improvements, accessibility adaptations, energy efficiency and weatherization, etc.¹⁵ In some cases, elected officials would like a comprehensive set of this information at their fingertips to better promote such programs within their communities.

Several communities are alarmed by the ongoing or potential conversion of single-family homes into multiple units. In particular, the Village of Nunda, Town of North Dansville, Village of Geneseo, and Village of Dansville are seeking tools to slow this, and the Village of Nunda has implemented a moratorium that its leadership intends to extend. The phenomenon of absentee landlords is particularly acute in the Dansville area. Furthermore, the Village of Geneseo, Village of Dansville, and Town of North Dansville feel saturated in terms of low-income rental units, and require strategies that promote single-family owner occupancy.

The Town of Conesus and Town of Livonia feature a sharp divide between lakeshore development trends and the more typical residential development in the remainder of the towns. In the densely developed lakeshore areas, older and seasonal properties are frequently being purchased and torn down to make way for expensive new homes. There is some concern about longstanding residents being priced out of these neighborhoods. Short-term rentals have been a subject of discussion in the County this year, with some year-round lakeside residents unsuccessfully calling for the Town of Livonia to implement short-term rental regulations. Regulation of short-term rentals could potentially have tax and revenue implications for the County and municipalities. Without

¹⁵ Weatherization assistance is now available on a regional basis through Cattaraugus Community Action rather than through Livingston County directly.

regulation, it is unclear how many properties are being rented short-term and how often, so it is not understood whether short-term rental properties are playing a role in driving up rental rates in the surrounding area.

A key tension in the Livingston County housing equation lies in the deficit of available affordable (non-market-rate) housing in proximity to employment centers. In the north, while access to a high concentration of local employers and easy access to the Rochester market makes the location attractive to prospective workers, the prevailing price points offer little in terms of accessibility for low to moderate income individuals. Conversely, in the south, price points are lower, providing housing accessibility for much of the workforce, while the concentration of jobs is limited and services are more scarce. This places an additional burden of transportation-related costs (commuting from south to north) on an already struggling population.¹⁶ As an illustration, the Avon area is home to a concentration of manufacturing jobs, most of which employ people from communities farther south, for whom market rate housing in the Avon area is unaffordable.

Opportunities, Needs, and Barriers to Safe, Affordable, and Accessible Housing

MRB Group leveraged the knowledge and expertise of the County's Housing and Homelessness Task Force (HHTF), consisting of 39 individuals representing 23 agencies committed to safe, healthy housing for their constituents, to understand opportunities, needs, and barriers to safe, affordable, accessible housing. The earlier Baseline Housing Initiatives section of this study discussed key housing condition, market, affordability, public perception, programmatic, and other issues.

Subsequently, additional MRB Group interviews with agencies and their clients provided a more complete picture of opportunities, needs, and barriers to safe, affordable (non-cost-burdening), and accessible housing. Notably:

- People without incomes who are placed by the County in temporary (motel) or permanent housing can remain at risk of homelessness due to the gap between their Section 8 stipend and the cost of rent. This is a particular theme for individuals who are in the process of seeking disability status.
- Waiting lists for non-market-rate units are long. Clients often face confusion in applying, have difficulty reaching someone at the management companies that can assist them, cannot determine how long their wait may be, and are unsure what they will need to be prepared with in the event that a unit becomes available for them. Several interviewees who have leveraged County and non-profit resources to address housing challenges cited a need for more hands-on, one-on-one assistance with accurately completing relevant paperwork and processes.
- The complete absence of longer-term supportive housing for those with substance abuse issues puts clients of agencies like CASA-Trinity (the treatment provider) at risk of incomplete treatment and relapse, unless they are willing and able to move out of the County to locations like Hornell and Bath. Many CASA clients exiting treatment have limited work history, require access

¹⁶ Appendix 3 contains municipal maps of housing and services, including RTS bus routes in relation to retail and housing.

(transportation) to services,¹⁷ and need 1-2 bedroom units, as many have some family in their households. When suitable housing is not found, homelessness is then a major driver of relapse.

- About half of the people in homes operated by the Arc could and should be living independently, but there are very long wait lists (1-2 years) for accessible, safe rental units. Moreover, since there are no more funds to create additional IRAs (Supervised Individualized Residential Alternatives group homes), family members of these individuals are hesitant to move them back to the family home or into independent living situations, because it would be so difficult to get them back into the group homes if needed.
- Domestic violence victims are often unable to take advantage of Chances & Changes accommodations for long enough to stabilize their lives and permanently exit the homelessness cycle, as County funds do not sustain long enough stays.
- Poor conditions of some rental properties with absentee landlords can pose safety and accessibility issues.
- Summer is often a time when families with school-aged children seek to move into more appropriate housing, and a lack of affordable (non-market-rate) 3-4 bedroom rental houses is apparent.
- Staff of housing-related agencies perceive that discrimination by landlords against voucher holders persists.
- Many parolees and probationers require access to services in Geneseo, Mount Morris, or Dansville, such as mental health counseling, substance abuse treatment, and employment services, but housing in Geneseo is typically unaffordable. There is a lack of non-market-rate rental properties in the County whose landlords accept parolees. Restrictions on living with other ex-offenders places an additional barrier on these individuals in seeking stable housing.
- Lack of accessibility modification in older homes is not just a safety issue for elderly residents and those with mobility impairments; it can in fact drive homelessness when residents are unable to find suitable housing.
- The declining availability of boarding house-type accommodations (short-term rental of rooms in a house)—a long-term nationwide phenomenon—has been an additional barrier to at-risk homeless finding group housing that they can afford.
- For people requiring placement in affordable (non-market-rate) housing, the inability to come up with a security deposit is a major stumbling block that human services agencies are limited in being able to address. For example, Catholic Charities is essential in bridging this financial gap for many people, but not everyone qualifies and the organization's funding level varies.
- A key opportunity for the County and its partners is to educate landlords about the benefits of partnering with agencies that serve special populations. In particular, the Arc could work with willing landlords to arrange for certification of their apartments by the New York State Office for People with Developmental Disabilities, which would ensure certain standards that benefit both the landlord and resident.

¹⁷ Appendix 3 contains municipal maps of housing and services, including RTS bus routes in relation to retail and housing.

Analysis of Housing Needs

Based on the preceding research, Livingston County faces the following key housing needs:

- There is a prevalent desire for new construction of market rate, single-story, single family homes suitable for first-time homebuyers, young families, and downsizing seniors, at prices of less than \$200,000. There is likely a need to make some such properties available on a rental basis.
- There is excess demand for affordable rental housing of all types (for those earning below or just above \$32,194, which is 60% of area median income), with the most acute need being for 1-bedroom units and 3-4 bedroom units, but communities that could absorb significant numbers of units have not demonstrated a commitment to such development.
- Additional supportive housing is needed for people with disabilities and for those in recovery from chemical dependency.
- Additional enriched housing, adult home products, and housing suitable for seniors to age in place are needed.
- Additional or strengthened programs and services are needed to help very-low-income residents and those with special needs (probationers, parolees, victims of domestic violence) to find and remain in long-term, appropriate housing situations.
- Residents need additional assistance toward improvements of older single family homes, and awareness of existing assistance.
- Municipalities are in need of tools to fight further conversion of single family homes into multiple units, as well as effective mechanisms to address derelict properties.

The subsequent section of this study will include further market analysis that will inform final recommendations for specific housing types and rates as well as other housing-related initiatives.

An aerial photograph of a residential development in Livingston County at sunset. The image shows a row of light blue, two-story townhouses in the foreground, surrounded by lush green trees. In the background, there are rolling hills and a distant town under a dramatic sky with orange and yellow hues from the setting sun.

Livingston County Housing Needs Assessment & Market Analysis

Chapter 4: Market Analysis

Prepared by:



Single-Family Housing Real Estate Trends

Across New York State, inventory of homes on the market has sharply decreased over the past several years, part of a national market trend. This is mirrored in Livingston County, where the number of homes for sale at year's end dropped by half from 2012-2018 (see Table 17). Nonetheless, in Livingston County, the number of homes sold per year has grown by over 18 percent over the past decade, peaking at 588 homes in 2016. And the number of homes sold in Avon and Geneseo has remained even over the last several years.

The median home sale price in Livingston County stood at \$130,000 for 2018, having risen by 12 percent over the past ten years (see Table 18). This rise is more or less on pace with the rate of inflation, and significantly lower than national home price appreciation. Home sale prices in the County have generally been similar to those of the greater Rochester region.¹ However, looking at the time period of 2013-2017 suggests that Livingston County prices are rising more slowly than that of the greater Rochester region (1.9 percent versus 4.8 percent). Home sale prices in Avon and Geneseo dipped in 2018, but considering the relatively low sample size of those markets, the long-term trend is one of fairly steady median home sale prices. (Data for Avon and Geneseo is available through the Greater Rochester Association of REALTORS, but other subsets of the County are not.)

In 2018, homes in Livingston County were on the market an average of 53 days, while homes in Avon and Geneseo were on the market for 45 days (see Table 19). Across the County, buyers received 93 percent of their original asking price (compared to about 97% nationally and in the Rochester Metropolitan Statistical Area, according to Zillow). The County's "months' supply of inventory at year end"—an indication of how long the current for-sale inventory would last given the current sales rate if no additional houses were put on the market—was 2.7 months, compared to the national figure of 4.0 months (according to the National Association of Realtors).

As of the end of the third quarter of 2019, the number of homes sold in Livingston County had increased by 7.1 percent year-over-year, somewhat exceeding the regional increase of 5.8 percent. The increases in number of homes sold, which occurred in spite of the number of homes for sale being down for the past few years, were attributed to a strong economy and still-low mortgage rates, leading buyers to be "serious and quick to place offers."² It is therefore expected that if potential buyers are presented with an adequate supply of inventory, home sales will increase.

¹ Although earlier chapters of this study defined the Rochester region as the Metropolitan Statistical Area, due to available real estate data resources, this section uses a much larger definition that includes Livingston, Monroe, Ontario, Wayne, Genesee, Orleans, Wyoming, Yates, Allegany, Steuben, Seneca, and Cayuga Counties.

² Greater Rochester Association of REALTORS press release, October 17, 2019, https://www.grar.org/wp-content/uploads/2017/05/2019_3QStats_PressRelease.pdf.

Table 17. Home Sales Statistics & Trends

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	Trends	
Closed Sales											% Change 2017-2018	% Change 2009-2018
Livingston County	480	410	363	442	418	449	519	588	543	569	+4.8%	+18.5%
Avon & Geneseo	61	96	93	93	81	89	130	122	N/A	127	N/A	+108.2%
Rochester Region*	N/A	N/A	N/A	N/A	12,951	13,133	13,977	15,247	14,802	N/A	N/A	N/A
Inventory of Homes for Sale at Year End											% Change 2017-2018	% Change 2012-2018
Livingston County	N/A	N/A	N/A	255	240	235	241	167	149	126	-15.4%	-50.6%
Avon & Geneseo	N/A	N/A	N/A	55	35	39	42	26	28	29	+3.6%	-47.3%
Rochester Region*	N/A	N/A	N/A	N/A	5,446	5,009	4,818	3,578	3,135	N/A	N/A	N/A
Pending Sales at Year End											% Change 2016-2017	% Change 2013-2018
Livingston County	N/A	N/A	N/A	N/A	417	449	551	574	555	N/A	-3.3%	+33.1%
Avon & Geneseo	N/A	N/A	N/A	N/A	79	92	133	124	108	N/A	-12.9%	+36.7%
Rochester Region*	N/A	N/A	N/A	N/A	12,772	13,257	14,372	15,221	15,010	N/A	-1.4%	+17.5%

Source: New York State Association of REALTORS; Greater Rochester Association of REALTORS (GRAR)

*Note: GRAR's Rochester Region includes Livingston, Monroe, Ontario, Wayne, Genesee, Orleans, Wyoming, Yates, Allegany, Steuben, Seneca, and Cayuga Counties.

Note: Data for Avon and Geneseo is available through the Greater Rochester Association of REALTORS, but other subsets of the County are not.

Table 18. Median Home Sales Price Trends

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	% Change 2017-2018	% Change 2014-2018
Livingston County	\$116,000	\$116,000	\$123,000	\$115,000	\$127,600	\$115,000	\$127,000	\$128,000	\$130,000	\$130,000	0.0%	+12.1%
Avon & Geneseo	\$158,000	\$158,000	\$148,000	\$136,250	\$147,500	\$138,450	\$159,000	\$159,950	\$160,000	\$148,250	-7.3%	-6.2%
Rochester Region*	N/A	N/A	N/A	N/A	\$124,000	\$123,000	\$126,500	\$125,000	\$130,000	N/A	N/A	N/A

Source: New York State Association of REALTORS; Greater Rochester Association of REALTORS (GRAR)

*Note: GRAR's Rochester Region refers to Livingston, Monroe, Ontario, Wayne, Genesee, Orleans, Wyoming, Yates, Allegany, Steuben, Seneca, and Cayuga Counties.

Note: Data for Avon and Geneseo is available through the Greater Rochester Association of REALTORS, but other subsets of the County are not.

Table 19. Other Market Indicators for 2018	
Median Showings Per Listing	
Livingston County	4.4
Avon & Geneseo Only	6.7
Months Supply of Inventory at Year End	
Livingston County	2.7
Avon & Geneseo Only	2.7
List to Close (Days)	
Livingston County	53
Avon & Geneseo Only	45
% of Original List Price Received	
Livingston County	92.7%
Avon & Geneseo Only	93.2%

Source: New York State Association of REALTORS; Greater Rochester Association of REALTORS (GRAR).

Note: The months' supply is the ratio of houses for sale to houses sold. This statistic provides an indication of the size of the for-sale inventory in relation to the number of houses currently being sold. The months' supply indicates how long the current for-sale inventory would last given the current sales rate if no additional new houses were built.

Multi-Family (Rental Apartment Complex) Real Estate Trends

MRB Group evaluated data from CoStar to identify real estate trends concerning apartment buildings and other multi-family housing complexes of four or more units. The analysis, tables, and graphs that follow are based on CoStar's database of 57 complexes across Livingston County, representing over 1,600 units in multi-family properties.³

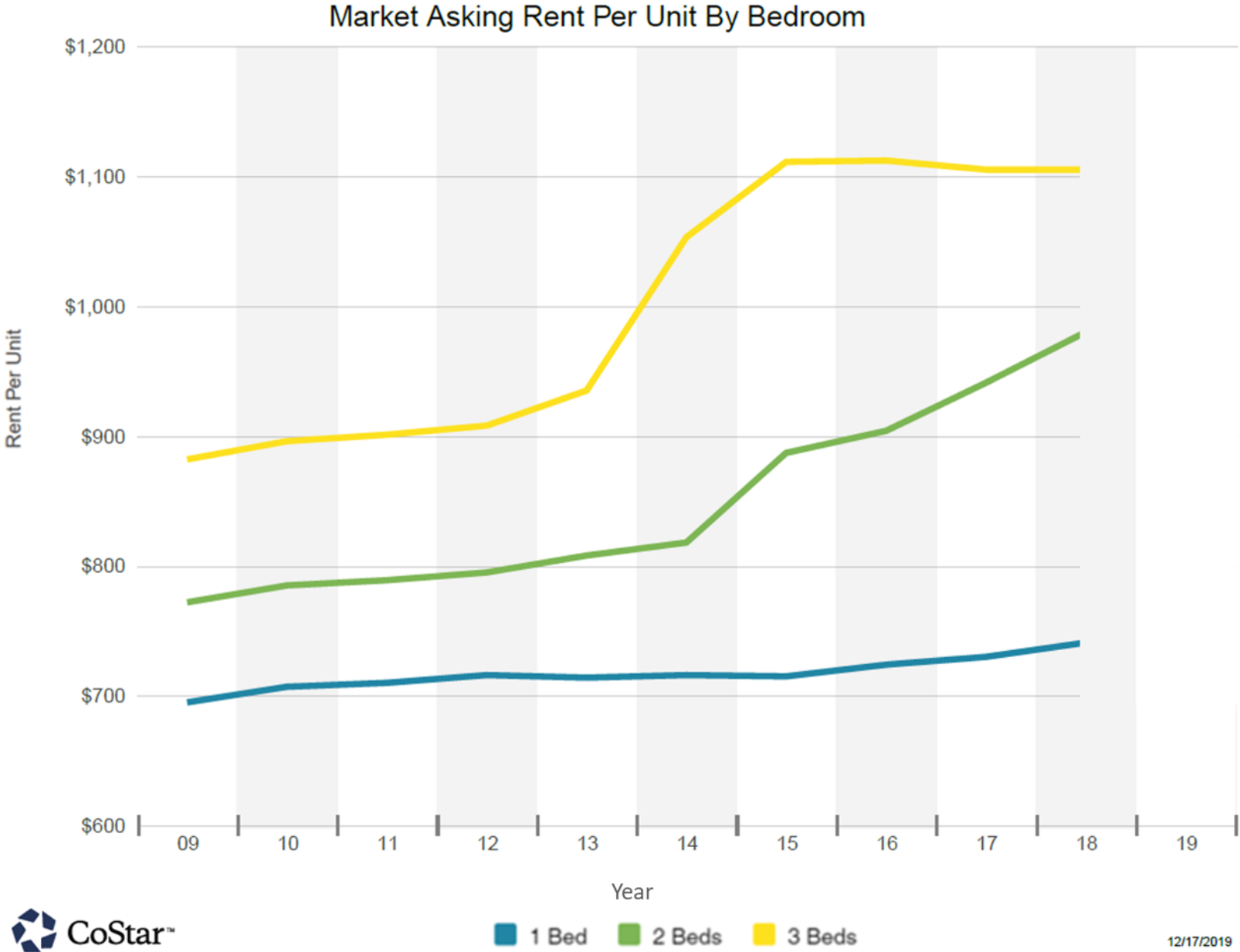
Market asking rent (excludes utilities) stood at \$905 per unit in 2019—\$767 for a one-bedroom, \$1,023 for a two-bedroom, and \$1,115 for a three-bedroom. One-bedroom rents rose only modestly over the past decade, while two-bedroom rents rose more sharply; however, one-bedroom rents are expected to rise over the next two years before leveling off at about \$900. Rents for three-bedroom apartments climbed significantly over the past five years, but are believed to have peaked.

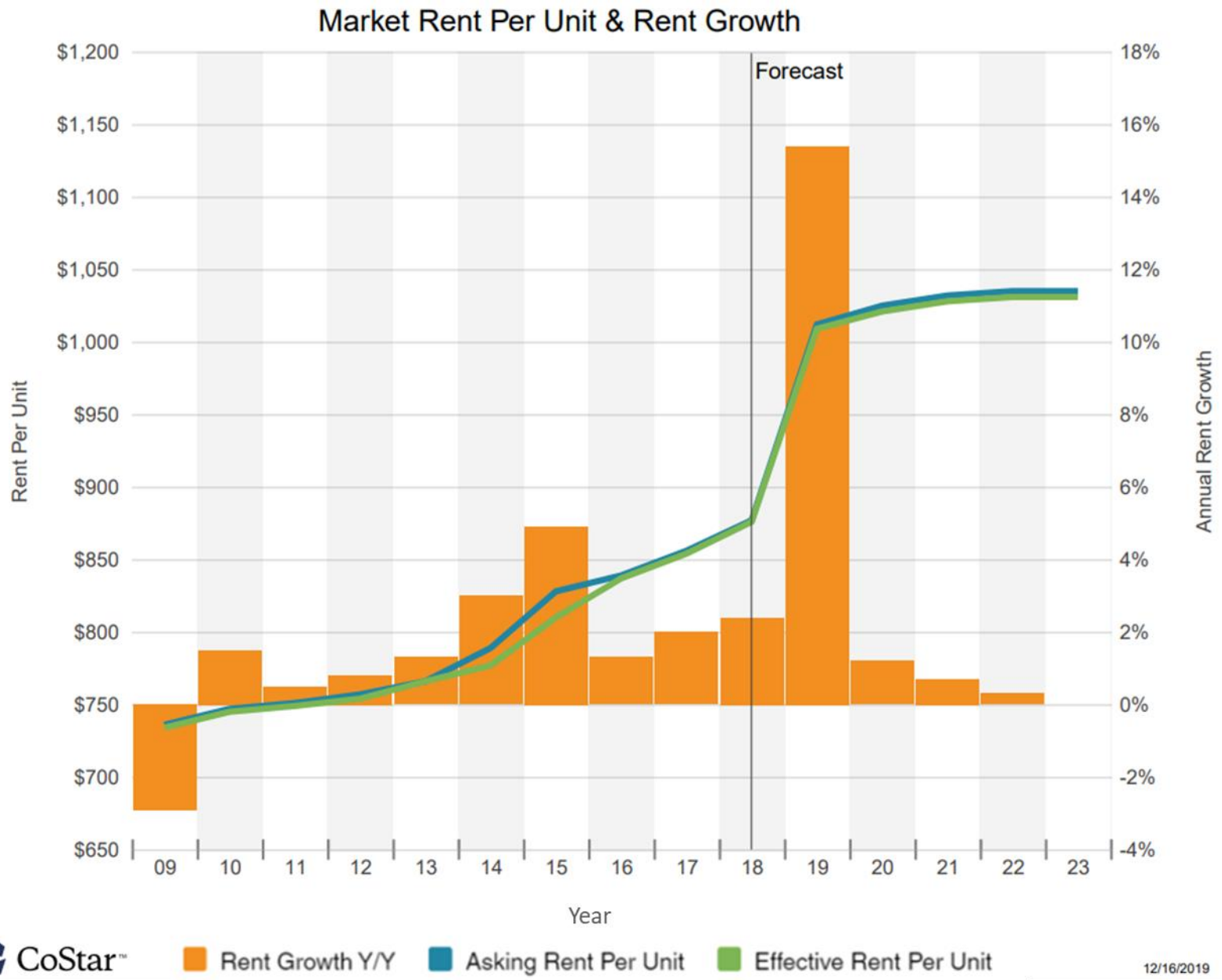
Vacancy across the County currently stands at 4.4 percent in 2019, or about 71 units, down from 8.7 percent in 2009, but is expected to rise to the 7 percent range (a healthy rental vacancy rate). Nonetheless, non-market-rate apartments in Livingston County generally maintain waiting lists, often several months long.

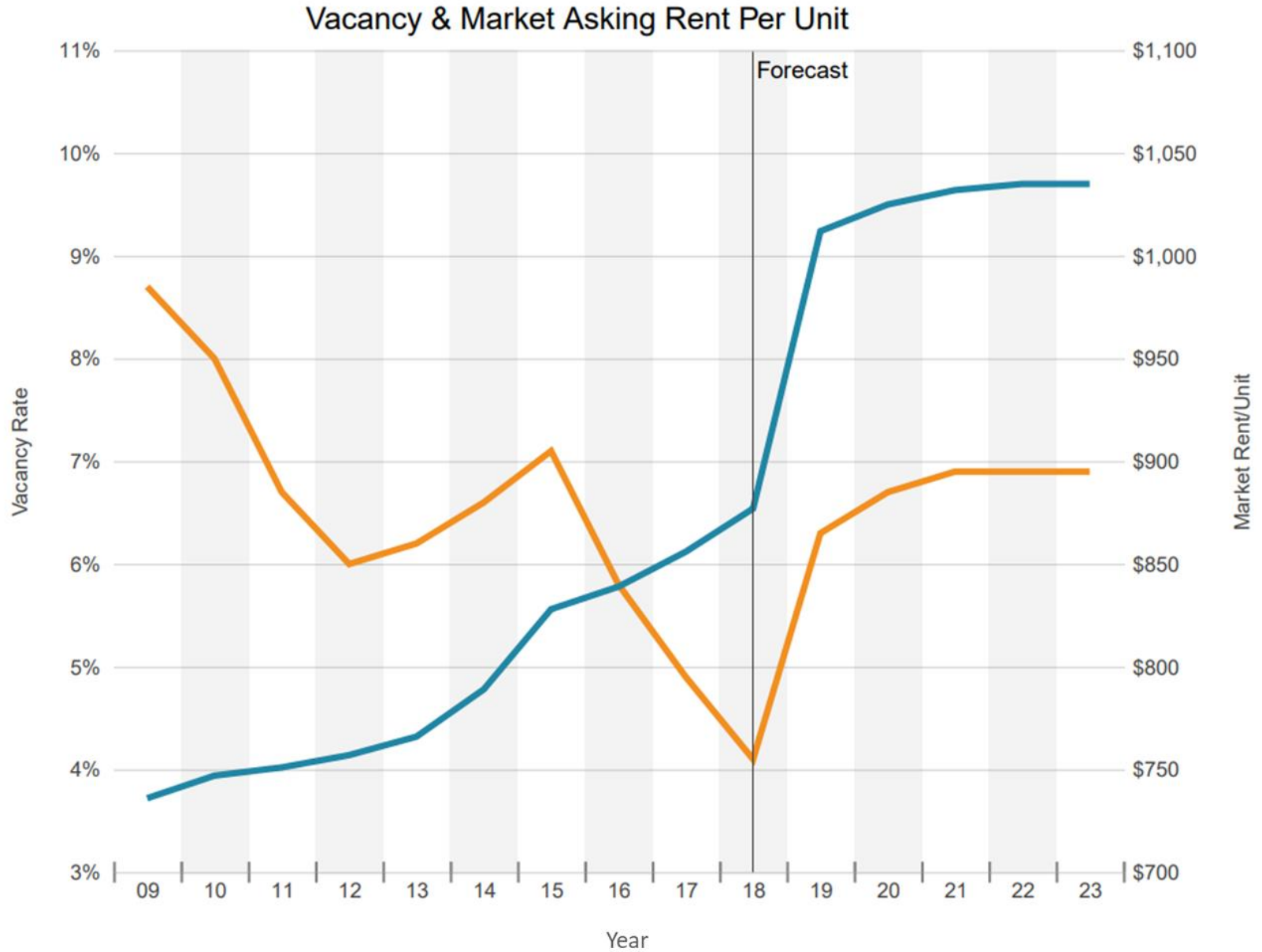
Table 20. Multi-Family Residential Market Overview			
Inventory		Availability	
Inventory Units	1,607	Vacancy Rate	4.4% (↑)
Existing Buildings	57	Vacant Units	71 (↑)
Average Units Per Building	28	Market Asking Rent/Unit	\$905 (↑)
12 Mo. Demolished Units	0	Market Asking Rent/SF	\$1.02 (↑)
12 Mo. Occupancy % at Delivery	100%	Studio Asking Rent	N/A
Under Construction Units	0	1 Bedroom Asking Rent	\$767 (↑)
12 Mo. Construction Starts Units	0	2 Bedroom Asking Rent	\$1,023 (↑)
12 Mo. Delivered Units	60	3 Bedroom Asking Rent	\$1,115 (↑)

Source: CoStar

³ This figure includes the Skybird Landing units delivered in 2019, but does not include the new 48-unit Wildbriar Estates.







12/16/2019

The multi-page Table 21 lists multi-family properties throughout Livingston County (generally those with four or more units), grouped by town and detailing the number of bedrooms, size, location, and price. The towns with the most apartment units are:

- Geneseo, with 714 units at an average price per square foot of \$1.02
- Avon, with 241 units at an average price per square foot of \$1.14
- Livonia, with 170 units at an average price per square foot of \$0.51 (price based only on Creekside Clearing data)
- North Dansville, with 143 units (not enough data to determine a useful price-per-square-foot figure, but 78 of the units are in affordable, non-market-rate complexes)

Forty-three percent of the County's rental units are one-bedroom apartments, 32 percent are two-bedroom apartments, fourteen percent are three- bedroom apartments, and the balance are studio apartments and 4+ unit apartments.

According to the most recent available CoStar data reported by property owners and property managers (December 2019), only a minimal number of units are available to rent across the County, with the exception of the Town of Geneseo (26 vacant units) and Town of Leicester (16 vacant units), and Town of Avon (8 vacant units). Others towns had three or fewer vacant units.

Table 21. Multi-Family Properties in Livingston County

Property Name or Address	Total Units	Avg Unit SF	Avg Rent / Unit	Avg Rent Per SF	% Vacant	1-Bedroom Units				2-Bedroom Units				3-Bedroom Units				Rent Type & Market Type
						#	Avg SF	Rent	# Vac.	#	Avg SF	Rent	# Vac.	#	Avg SF	Rent	# Vac.	
Town of Avon	241			\$1.14					2				6				0	
Avon Commons Apartments	128	1,046	\$1,278	\$1.22	3.9%					128	1,047	\$1,277	5					Market
Avon on the Green	35	575	\$652	\$1.13	2.9%	35	575	\$652	1									Rent Restricted; Senior
Community Manor Apartments	32	625	\$490	\$0.78	3.1%	28	600	\$481	1	4	800	\$551	0					Rent Subsidized; Senior
Community Manor Apartments II	24	617	\$766	\$1.24	4.2%	22	600	\$753	0	2	800	\$908	1					Rent Subsidized; Senior
61 Park Pl	17	1,040				6	748		0	6	1,042		0	5	1,388		0	Market
57 Genesee St	5					1			0	3			0	1			0	Market/Affordable
Town of Caledonia	33			\$0.85					0				1				0	
Caledonia Apartments	24	670	\$567	\$0.85	0.0%	8	650	\$541	0	16	680	\$578	1					Rent Subsidized
3105 Main St	5																	Market
3163 East Ave	4																	
Town of Conesus	3								0				0				0	
5531 Cottonwood Dr	3									1			0	2			0	Market
Town of Geneseo	778			\$1.02					8				16				2	
The Hammocks at Geneseo	160	1,153	\$1,425	\$1.24	6.9%	69	996	\$1,296	4	77	1,242	\$1,495	5	14	1,437	\$1,663	1	Market
Geneseo Heights Apartments	110	802	\$835	\$1.03	3.6%	33	715	\$795	1	77	850	\$850	3			\$1,010		Market
Morgan Estates (indep. living only)	64																	Senior
The Highlands Apartments	89	1,097	\$1,253	\$1.14	1.1%					11	649	\$883	1	78	1,160	\$1,303	0	Rent Subsidized
Skybird Landing Apartments	60	773				55	748		0	5	1,042		0					Rent Restricted; Senior
Valley View Apartments	54	857	\$676	\$0.79	3.7%	34	748	\$647	1	20	1,042	\$722	1					Market
Upper South St. Senior Housing	45	800	\$621	\$0.78		45	800	\$620	0									Rent Subsidized; Senior
Genesee Country Apartments	36	750	\$520	\$0.69	5.6%	12	650	\$484	0	16	700	\$524	2	8	1,000	\$556	0	Rent Subsidized
Brookside & Genesee County Apts.	36	796	\$475	\$0.60	8.3%	15	650	\$458	0	21	900	\$487	4					Rent Subsidized
Livingston Fox Run	32	945			3.1%	32	945		1									Affordable Units
April Meadows	24				4.2%									24			1	Rent Restricted
Clayton Heights Apartments	24				4.2%	24			1									Affordable Units
Campus Crossing	20	1,200	\$1,453	\$1.21														Market
18 Orchard St	16				6.3%													Market
21 Orchard St	8																	Market

Source: CoStar and other research. Town data includes units in villages. Shaded cells means either not applicable or no data available. "Rent" refers to asking rent; concession rates in Livingston County are currently negligible.

5908 Stone Hill Road in Livonia contains 8 studio units in addition to the 4 four-bedroom units shown above. 4586 Clay Road in Livonia contains 1 studio unit in addition to the 3 1-bedroom units shown above.

Campus Crossing in Geneseo contains 20 four-bedroom units averaging 1,200 SF and renting for \$1,451; none are vacant.

Town-level data for rent per square foot is weighted by the number of units at a particular price per SF.

Table 21. Multi-Family Properties in Livingston County (Continued)

Property Name or Address	Total Units	Avg Unit SF	Avg Rent / Unit	Avg Rent Per SF	% Vacant	1-Bedroom Units				2-Bedroom Units				3-Bedroom Units				Rent Type & Market Type
						#	Avg SF	Rent	# Vac.	#	Avg SF	Rent	# Vac.	#	Avg SF	Rent	# Vac.	
Town of Leicester	25								16				0				0	
134 Main St	18				88.9%	18			16									Market
Cuylerville Apartments	7					1			0					6			0	Market
Gateway Apartments	~4																	
Town of Lima	122								1				0				0	
Crossroads Village	36	1,130			5.6%	20	1,200		1	16	1,042		0					Rent Restricted
Lima Manor Apartments	32				3.1%													Rent Restricted
Livingston Street Apartments	40							\$660				\$785						Market
1458 Rochester St	6					5			0	1			0					Market
1173 York St	4					1			0	3			0					Market
1177 York St	4					1			0	3			0					Market
Town of Livonia	170			\$0.51					1				1				1	
Creekside Clearing	64	1,258	\$645	\$0.51	3.1%					24	1,042	\$561	1	40	1,388	\$694	1	Rent Restricted
Wildbriar Estates*	48		\$703			44				4								Affordable; Senior
Westview Hills	24	748			4.2%	24	748		1									Affordable Units; Senior
5908 Stone Hill Rd	12													4			0	Market
4672 Main St	6					6			0									Market
62 Big Tree St	5																	Market
3195 Bronson Hill Rd	4					4			0									Market
4586 Clay St	4					3			0									Market
5887 Big Tree Rd	3					3			0									Market

Source: CoStar and other research. Town data includes units in villages. Shaded cells means either not applicable or no data available. "Rent" refers to asking rent; concession rates in Livingston County are currently negligible.

5908 Stone Hill Road in Livonia contains 8 studio units in addition to the 4 four-bedroom units shown above. 4586 Clay Road in Livonia contains 1 studio unit in addition to the 3 1-bedroom units shown above.

Campus Crossing in Geneseo contains 20 four-bedroom units averaging 1,200 SF and renting for \$1,451; none are vacant.

Town-level data for rent per square foot is weighted by the number of units at a particular price per SF.

Table 21. Multi-Family Properties in Livingston County (Continued)

Property Name or Address	Total Units	Avg Unit SF	Avg Rent / Unit	Avg Rent Per SF	% Vacant	1-Bedroom Units				2-Bedroom Units				3-Bedroom Units				Rent Type & Market Type
						#	Avg SF	Rent	# Vac.	#	Avg SF	Rent	# Vac.	#	Avg SF	Rent	# Vac.	
Town of Mount Morris	46			\$0.83					0				0				0	
Bellamy Hill Apartments	36	669	\$556	\$0.83		20	625	\$540	0	16	725	\$575	0					Rent Subsidized
7 Trumbell St	8																	Market
27 Eagle St	2																	Market
Town of North Dansville	143								1				0				0	
Faulkner Apartments	47				2.1%													Affordable Units
1 Park Hills Dr	32	680			3.1%	32	680		1									Market
Hammond Place Apartments	31	1,213			3.2%	2	748		0	12	1,042		0	17	1,388		0	Affordable Units
115 Main St	11					9			0	1			0	1			0	Market
103 Main St	8					6			0	2			0					Market
25 West Ave	6					2			0	4			0					Market
10053 Hornell Rd	4																	Market
27 West Ave	4					1			0	3			0					Market
Spring Creek Apartments																		
Town of Nunda	48			\$1.04					1				1				0	
Woodside Apartments	24	748			4.2%	24	748		1									Rent Subsidized; Senior
Nunda Village Apartments	24	926	\$960	\$1.04	4.2%	2	684	\$689	0	8	894	\$874	1	14	979	\$1,041	0	Rent Subsidized
Hillside Village Apartments																		Rent Subsidized

Source: CoStar and other research. Town data includes units in villages. Shaded cells means either not applicable or no data available. "Rent" refers to asking rent; concession rates in Livingston County are currently negligible.

5908 Stone Hill Road in Livonia contains 8 studio units in addition to the 4 four-bedroom units shown above. 4586 Clay Road in Livonia contains 1 studio unit in addition to the 3 1-bedroom units shown above.

Campus Crossing in Geneseo contains 20 four-bedroom units averaging 1,200 SF and renting for \$1,451; none are vacant.

Town-level data for rent per square foot is weighted by the number of units at a particular price per SF.

New Residential Units, Permit Data, and Trends

New Residential Units

The most significant construction projects for new multi-family residential complexes in Livingston County over the past several years were:

- Wildbriar Estates in the Village of Livonia, opened in 2019 (48 total units including affordable and senior living; 44 one-bedroom units and four two-bedroom units; 16 of the units are single-story townhouses)
- Skybird Landing in the Village of Geneseo, opened in 2019 (60 one- and two-bedroom garden-style apartments with lower-income and supportive housing options)
- Hammocks at Geneseo in the Town of Geneseo, built in 2014 with additional phase begun in 2016 (160 one- and two-bedroom market-rate townhouse-style units)
- Avon Commons in the Village of Avon, built in 2007 (128-unit market-rate garden-style units)

Real estate data projections do not forecast any significant apartment complexes to be built through 2023.⁴ However, possible future developments include a proposed affordable housing project in Lima of up to 60 apartments by PathStone, and the potential redevelopment of the Kings Daughters Home in the Village of Dansville into apartment units.

Following the construction of some sizeable subdivisions in the 1980s and 1990s, single-family home construction in Livingston County has generally occurred on a smaller scale and scattered-site basis, which is discussed in Chapter 3 in the section titled “Proposed and Planned Units and Developments.”

⁴ Source: CoStar.

Permit Data Analysis

MRB Group reviewed residential building permit data collected by the Genesee/Finger Lakes Regional Planning Council from municipal representatives (see Table 22 and Table 23). This data is considered incomplete, and there are inconsistencies across municipalities in the issuance of and reporting on permits, however MRB Group analyzed the available data to identify trends.

According to the available data, in 2018, 55 permits were issued for construction of 99 new residential units (one permit may cover multiple units or even an entire apartment complex). The new Wildbriar Estates senior living complex in the Village of Livonia accounted about half of those units (four permits covering 48 units and \$7.2 million worth of work). Communities with the most construction activity on new single-family homes in 2018 were:

- The Town of Livonia issued twelve permits covering about \$3 million of work on new homes totaling about 26,000 square feet.⁵ (Notably, the Town of Livonia has consistently issued over 10 residential building permits per year for the last five years reported.)
- The Village of Caledonia issued four permits covering over \$2 million of work on new homes totaling about 1,800 square feet.
- A handful of permits for new manufactured or mobile homes were issued in the Towns of Caledonia (6 permits), Livonia (4 permits), and York (4 permits).
- The Towns of Avon, Geneseo, and Conesus each issued three residential building permits for single-family homes.

The rest of the municipalities in Livingston County issued two or fewer permits for single-family home building in 2018.

When setting aside the Wildbriar Estates permits, the number of units constructed in 2018 (51 units) is similar to that of 2015 (60 units) and 2016 (75 units), years that did not involve a significant apartment complex project. A relatively high number of units received building permits in 2017 due to the Skybird Landing project, which broke ground in January 2018 in the Village of Geneseo. And a relatively high number of units received permits in 2014, likely attributable to some portion of the construction of the Hammocks at Geneseo in the Town of Geneseo. Many municipal leaders interviewed stated that a significant portion of permits over the past few years were for new manufactured or mobile homes, or replacing fire-damaged structures; and that few were for new stick-built single-family homes.⁶

⁵ Town and Village permits are reported separately, so Town totals do not include permits issued within a Village.

⁶ However, the Town of Sparta believes its permit data understate actual construction activity over the past five years.

Table 22. Building Permits for New Residential Units Reported in 2018

Municipality	Single Family			Two Family				Three or Four Family				Five or More Family				Manufactured/Mobile			Total Permits	Total Units
	Permits	Total SF	Total Value	Permits	Units	Total SF	Total Value	Permits	Units	Total SF	Total Value	Permits	Units	Total SF	Total Value	Permits	Total SF	Total Value		
Town of Avon	0	0	\$0	0	0	0	\$0	0	0	0	\$0	0	0	0	\$0	2	1,604	\$50,700	2	2
Town of Caledonia	0	0	\$0	0	0	0	\$0	0	0	0	\$0	0	0	0	\$0	6	5,740	\$156,000	6	6
Town of Conesus	3	4,572	\$440,000	0	0	0	\$0	0	0	0	\$0	0	0	0	\$0	0	0	\$0	3	3
Town of Geneseo	3	5,000	\$600,000	0	0	0	\$0	0	0	0	\$0	0	0	0	\$0	0	0	\$0	3	3
Town of Groveland	1	1,400	\$150,000	0	0	0	\$0	0	0	0	\$0	0	0	0	\$0	1	1,352	\$112,000	2	2
Town of Leicester	1	1,200	\$70,000	0	0	0	\$0	0	0	0	\$0	0	0	0	\$0	0	0	\$0	1	1
Town of Lima	1	3,706	\$350,000	0	0	0	\$0	0	0	0	\$0	0	0	0	\$0	0	0	\$0	1	1
Town of Livonia	12	25,675	\$2,999,280	0	0	0	\$0	0	0	0	\$0	0	0	0	\$0	4	5,460	\$423,000	16	16
Town of Mt. Morris	0	0	\$0	0	0	0	\$0	0	0	0	\$0	0	0	0	\$0	0	0	\$0	0	0
Town of N. Dansville	0	0	\$0	0	0	0	\$0	0	0	0	\$0	0	0	0	\$0	1	1,344	\$90,000	1	1
Town of Nunda	0	0	\$0	0	0	0	\$0	0	0	0	\$0	0	0	0	\$0	1	1,600	\$250,000	1	1
Town of Ossian	0	0	\$0	0	0	0	\$0	0	0	0	\$0	0	0	0	\$0	0	0	\$0	0	0
Town of Portage	0	0	\$0	0	0	0	\$0	0	0	0	\$0	0	0	0	\$0	0	0	\$0	0	0
Town of Sparta	N/A																		N/A	N/A
Town of Springwater	N/A																		N/A	N/A
Town of West Sparta	0	0	\$0	0	0	0	\$0	0	0	0	\$0	0	0	0	\$0	0	0	\$0	0	0
Town of York	1	1,482	\$185,000	0	0	0	\$0	0	0	0	\$0	0	0	0	\$0	4	5,907	\$487,000	5	5
Village of Avon	3	5,287	\$837,150	0	0	0	\$0	0	0	0	\$0	0	0	0	\$0	0	0	\$0	3	3
Village of Caledonia	4	17,800	\$2,188,000	0	0	0	\$0	0	0	0	\$0	0	0	0	\$0	0	0	\$0	4	4
Village of Dansville	0	0	\$0	0	0	0	\$0	0	0	0	\$0	0	0	0	\$0	0	0	\$0	0	0
Village of Geneseo	0	0	\$0	0	0	0	\$0	0	0	0	\$0	0	0	0	\$0	0	0	\$0	0	0
Village of Leicester	0	0	\$0	0	0	0	\$0	0	0	0	\$0	0	0	0	\$0	0	0	\$0	0	0
Village of Lima	0	0	0	0	0	0	\$0	0	0	0	\$0	0	0	0	\$0	0	0	\$0	0	0
Village of Livonia	0	0	0	0	0	0	\$0	1	4	3,188	\$600,000	3	44	45,628	\$6,600,000	1	1,344	\$120,497	5	49
Village of Mt. Morris	0	0	\$0	0	0	0	\$0	0	0	0	\$0	0	0	0	\$0	0	0	\$0	0	0
Village of Nunda	2	3,000	\$300,000	0	0	0	\$0	0	0	0	\$0	0	0	0	\$0	0	0	\$0	2	2
Totals	31	69,122	\$8,119,430	0	0	0	\$0	1	4	3,188	\$600,000	3	44	45,628	\$6,600,000	20	24,351	\$1,689,197	55	99

Source: Genesee/Finger Lakes Regional Planning Council, collected from municipal representatives. N/A = not available.

Town and Village permits are reported separately, therefore Town totals do not include permits issued within a Village.

Table 23. Building Permits for New Residential Units Issued Over Past 5 Years

Municipality	Residential Units					
	2014	2015	2016	2017	2018	5yr
Town of Avon	6	5	4	3	2	20
Town of Caledonia	2	1	8	5	3	19
Town of Conesus	1	0	7	5	2	15
Town of Geneseo	48	4	4	5	1	62
Town of Groveland	3	4	3	3	0	13
Town of Leicester	1	3	2	5	1	12
Town of Lima	2	2	0	1	1	6
Town of Livonia	15	13	13	13	N/A	54
Town of Mount Morris	2	0	2	2	0	6
Town of North Dansville	7	3	5	2	3	20
Town of Nunda	1	1	4	4	4	14
Town of Ossian	0	1	2	2	0	5
Town of Portage	3	1	1	0	0	5
Town of Sparta	1	1	3	2	N/A	7
Town of Springwater	3	5	6	3	N/A	17
Town of West Sparta	1	0	1	1	0	3
Town of York	1	2	2	1	2	8
Village of Avon	2	1	2	4	6	15
Village of Caledonia	1	0	0	2	3	6
Village of Dansville	1	1	1	0	1	4
Village of Geneseo	3	2	0	62	16	83
Village of Leicester	0	0	0	0	1	1
Village of Lima	1	7	3	0	0	11
Village of Livonia	0	1	2	0	N/A	3
Village of Mount Morris	0	0	0	0	5	5
Village of Nunda	4	2	0	0	0	6
County Totals	109	60	75	125	51	420

Source: Genesee/Finger Lakes Regional Planning Council, collected from municipal representatives. N/A = not available.

Town and Village permits are reported separately, therefore Town totals do not include permits issued within a Village.

Summary and Projections

The preceding data as well as information gathered in interviews with municipal leaders, residents, and developers, show a relatively tight housing market in Livingston County with low inventory, quick sales, and low apartment vacancy. Given low interest rates and low unemployment (nationally and in Livingston County), it is expected that home sales activity in Livingston County will continue to be strong in the relative near future, and that a modest amount of new housing inventory—both single-family homes and apartments—would be readily absorbed. With no major single-family home developments planned, and significant challenges in siting new affordable (non-market-rate) apartment complexes, low inventory and the absence of new construction will contribute to rising housing prices and affordability challenges for Livingston County residents. Low-income residents will continue to have difficulty finding housing with affordability protections, and residents who do not qualify for such housing but earn modest incomes will find themselves increasingly cost-burdened by their mortgages and rents.

National macroeconomic trends, particularly unknown factors like long-term interest rates and the timing of the next recession, will also play an important role in determining the path of Livingston County's housing market over the next decade. For example, a housing market recession, predicted by some, will dampen prospects for new construction. However, as noted earlier, Livingston County's home price appreciation over the past decade has been significantly lower than national home price appreciation, so the County would be somewhat insulated from any significant drop in home values in this scenario.



Livingston County Housing Needs Assessment & Market Analysis

Chapter 5: Implementation Strategies & Recommendations

Prepared by:



Livingston County Housing Strategic Framework

In the following matrix, MRB Group provides implementation strategies and recommendations for Livingston County, its municipalities, and its other partners to address current and future housing needs. These market-tested strategies are based on a thorough analysis of the existing housing stock and the needs of current and future residents, and grounded in an understanding of market conditions and community priorities. They are organized by the overarching goals of 1) combatting deterioration of aging housing stock, 2) increasing housing affordability, 3) increasing housing choice, and 4) developing and aligning policy frameworks to address housing objectives.

This matrix is a tool to guide housing policy decisions, stimulate collaborative efforts to address housing gaps, and prepare communities to leverage future funding opportunities.

Goal 1: Combat deterioration of aging housing stock		
Strategy 1.1: Identify chronic and severe housing challenges among existing stock		
Action	Lead Organizations	Resources and Funding Sources
1.1.1: Collect and analyze code enforcement data to identify chronic and severe property maintenance issues.	Livingston County Planning Department	Existing staff time
1.1.2: Adopt aggressive code enforcement measures, including administrative and court remedies to address blight and deterioration.	Municipal code enforcement officers	Existing staff time; leverage knowledge of Springwater Town Supervisor (Code Compliance Specialist with NYS Dept. of State)
1.1.3: Convene a working group of municipal elected and code enforcement officials to develop a unified regulatory approach to addressing conversion of single family homes.	Livingston County Planning Department	Existing staff time

Goal 1: Combat deterioration of aging housing stock (continued)		
Strategy 1.2: Identify and apply resources to address deterioration and modernization		
Action	Lead Organizations	Resources and Funding Sources
1.2.1: Continue to pursue Community Development Block Grants, NYS HOME funds, NYS Rural Area Revitalization Program funds, and New York Main Street funds for housing rehabilitation.	Municipal leadership; potential coordination by Livingston County Economic Development	NYS Homes & Community Renewal programs
1.2.2: Accelerate and expand the use of the Livingston County Land Bank to identify, acquire, and mitigate issues in blighted and deteriorating housing.	Livingston County Land Bank	Land Bank funds; in partnership with Habitat for Humanity and potentially developers such as Arbor Housing and Development and PathStone
1.2.3: Facilitate financing and technical assistance from not-for-profits to support renovations, weatherization, and upgrades to manufactured housing stock.	Owners and residents of mobile home parks	Pathstone's Manufactured Home Cooperative Program
1.2.4: Develop, regularly update, and periodically disseminate publications outlining existing resources and programs to support homeowner repairs, improvements, and weatherization.	Livingston County Planning Department	Existing staff time
1.2.5: Implement Landlord Ambassador Program, preserving affordable units by providing owners with technical assistance required to update buildings, identify resources, and address violations.	Must be led by community-based not-for-profit	New York State Landlord Ambassador Program (Office of the Attorney General); Enterprise Community Partners
1.2.6: Educate property owners of historic structures on federal and state historic tax credit programs.	Livingston County Planning Department	Existing staff time

Goal 2: Increase housing affordability		
Strategy 2.1: Mitigate cost of housing development and home ownership through incentive programs		
Action	Lead Organizations	Resources and Funding Sources
2.1.1: Review Livingston County Industrial Development Agency's Unified Tax Exemption Policy and promote Payment in Lieu of Taxes agreements to support multi-family and mixed-use development.	Livingston County IDA	N/A
2.1.2: Adopt and promote the use of relevant Real Property Tax Law 485 exemptions to support development of desired housing products.*	Livingston County Planning Department to coordinate and inform; municipal leadership to adopt; school districts to participate where applicable	Advisement by Livingston County Real Property Tax Services
2.1.3: Develop incentive programs for homebuyers who are currently working in Livingston County, but do not reside here.	Livingston County Economic Development; promote to local employers	Local Development Corporation funds
Strategy 2.2: Explore the development of alternative housing products		
Action	Lead Organizations	Resources and Funding Sources
2.2.1: Identify regional manufacturers of modular and manufactured homes and connect with developers for sites with suitable zoning.	Municipal leaders, Livingston County Planning Department, Livingston County Economic Development	Solar Home Factory as a potential regional manufacturer

* Appendix 3 table lists real property tax exemptions applicable to housing development that have been adopted to date by the County and various towns, villages, and school districts.

Goal 3: Increase housing choice		
Strategy 3.1: Facilitate development of additional market rate single-family housing product		
Action	Lead Organizations	Resources and Funding Sources
3.1.1: Coordinate pre-planning with local property owners of properties in excess of ten acres, suitably zoned, and serviced by public water and sewer for potential micro-development.	Municipal leaders	N/A
3.1.2: Market sites from 3.1.1 to developers and homebuilders for projects of ten or fewer homes at a price point of \$125,000-\$200,000.	Municipal leaders	Real Property Tax Law 485 exemptions
Strategy 3.2: Facilitate development of additional market rate multi-family housing product		
Action	Lead Organizations	Resources and Funding Sources
3.2.1: Encourage property owners to consider development of upper story housing in downtowns throughout the County.	Municipal leaders	New York Main Street program; Rural Area Revitalization Program; historical rehabilitation tax credits; Real Property Tax Law exemptions; potential IDA PILOTS
3.2.2: Market sites in hamlets and downtown-adjacent areas for four-plex/townhome development.	Municipal leaders	Historical rehabilitation tax credits; Real Property Tax Law exemptions; potential IDA PILOTS; NYS Homes & Community Renewal programs

Goal 3: Increase housing choice (continued)		
Strategy 3.3: Facilitate development of additional affordable/subsidized housing products		
Action	Lead Organizations	Resources and Funding Sources
3.3.1: Expand partnership with Livingston County Land Bank to package tax-delinquent homes and market to developers for low-cost single family product.	Livingston County Land Bank	Land Bank funds and partnerships with Habitat for Humanity and potentially developers such as Arbor Housing and Development and PathStone
3.3.2: Pilot co-living and other alternative multi-family housing product via Land Bank or other suitable public-private partnerships and programs.	Livingston County Land Bank	Land Bank funds and partnerships with Habitat for Humanity and potentially developers such as Arbor Housing and Development and Pathstone
3.3.3: Market sites for new multi-family developments with affordability protections. Most communities could absorb an additional 12-20 units, and some in proximity to services can support at least 60+ new units. Must have public water and sewer.	Municipal leaders, Livingston County Economic Development	USDA rural development programs; NYS Homes & Community Renewal programs
Strategy 3.4: Develop additional housing product for seniors		
Action	Lead Organizations	Resources and Funding Sources
3.4.1: Explore co-living and other alternative housing models that reduce rent and maintenance responsibilities, while increasing socialization, health, and safety for seniors.	Livingston County Planning Department; Livingston County Land Bank; not-for-profit developers	Empire State Supportive Housing Initiative; HUD Assisted Living Conversion Program
3.4.2: Partner with local contractors to develop streamlined programs for retro-fitting existing housing to support aging in place.	Livingston County Planning Department	Rochester Homebuilders Association
3.4.3: Pursue development of additional affordable rental housing for seniors, including units both with and without direct rental subsidies and supportive programming.	Not-for-profit developers	Empire State Supportive Housing Initiative; HUD Assisted Living Conversion Program

Goal 3: Increase housing choice (continued)		
Strategy 3.5: Develop additional housing products for vulnerable populations		
Action	Lead Organizations	Resources and Funding Sources
3.5.1: In advance of funding opportunities, identify “shovel ready sites” in communities that are supportive of projects.	Municipal leaders	N/A
3.5.2: Facilitate development of additional group homes for people with intellectual and developmental disabilities in more densely developed areas.	The Arc of Livingston-Wyoming	NYS Office for People with Developmental Disabilities; Empire State Supported Housing Initiative
3.5.3: Facilitate discussions with multi-family property owners, the Arc of Livingston-Wyoming, and the NYS Office for People with Developmental Disabilities to certify apartments for individuals with developmental disabilities.	The Arc of Livingston-Wyoming	NYS Office for People with Developmental Disabilities
3.5.4: In more densely developed areas in south County, facilitate additional supportive residential units for people in treatment for chemical dependency.	CASA-Trinity	NYS Office of Alcoholism & Substance Abuse; Dormitory Authority of New York State; Empire State Supportive Housing Initiative
3.5.5: Facilitate development of two group homes for those recently completing chemical dependency treatment.	CASA-Trinity	NYS Office of Alcoholism & Substance Abuse; Dormitory Authority of New York State; Empire State Supportive Housing Initiative
3.5.6: Facilitate development of temporary shelters for homeless.	Livingston County Department of Social Services with non-profit developers	New York State Homeless Housing and Assistance Program; Empire State Supportive Housing Initiative
3.5.7: Identify funding sources for extending stays in supportive housing for victims of domestic violence.	Livingston County Department of Social Services; Chances and Changes	NYS Office of Children and Family Services; NYS Office of Victim Services; private organizations such as Allstate Foundation Purple Purse

Goal 4: Develop and align policy framework to address housing goals		
Strategy 4.1: Ensure local long-range plans are reflective of current values and aligned with regulatory frameworks		
Action	Lead Organizations	Resources and Funding Sources
4.1.1: Update any municipal comprehensive plan that was last updated more than ten years ago; ensuring that housing is adequately addressed.	Municipal leadership	Community Development Block Grants
4.1.2: Ensure that zoning and development regulations are reflective of municipal comprehensive plan housing goals.	Municipal planning and zoning boards	Local resources
Strategy 4.2: Implement recommendations of the County's 2020 water/sewer study		
Action	Lead Organizations	Resources and Funding Sources
4.2.1: Identify areas where existing, up to date comprehensive plans recommend development.	Municipal governments	N/A
4.2.2: Address extensions of utilities in areas targeted for housing development.	Municipal governments	Municipal funds and bond issuances; Community Development Block Grants for infrastructure development; various economic development incentive programs if job-creating enterprises will also be served
Strategy 4.3: Create sound public education and engagement opportunities to bolster trust between the public, local leadership, and the		
Action	Lead Organizations	Resources and Funding Sources
4.3.1: Redesign public engagement processes at the planning and zoning board level to provide for additional front-end information and feedback.	Livingston County Planning Department	Existing staff time
4.3.2: Develop and communicate clear definitions around affordable, subsidized, and supportive housing.	Livingston County Planning Department	Existing staff time
4.3.3: Develop a marketing campaign geared at dispelling myths around supportive housing.	Livingston County Planning Department	Existing staff time

Goal 4: Develop and align policy framework to address housing goals (continued)		
Strategy 4.4: Leverage the capacity of the Homelessness and Housing Task Force (HHTF) framework		
Action	Lead Organizations	Resources and Funding Sources
4.4.1: Invest in dedicated staff for the HHTS to support operations and execution.	Livingston County Department of Social Services	DSS funds
4.4.2: Explore the use of work groups/sub-committees for the HHTF to address specific goals and challenges.	Livingston County Department of Social Services	N/A
Strategy 4.5: Clearly communicate policy goals and development preferences to the market		
Action	Lead Organizations	Resources and Funding Sources
4.5.1: For communities that are seeking additional affordable housing, develop policy statements to that effect.	Town and Village boards	N/A
4.5.2: Develop information packages identifying available land, zoning, and willingness to support financing initiatives.	Municipal leadership	N/A
Strategy 4.6: Strengthen Countywide understanding of building and renovation activity		
Action	Lead Organizations	Resources and Funding Sources
4.6.1: Convene a working group to identify ways to improve the consistency, detail, and local and regional collection of residential building permits and permit data.	Livingston County Planning Department, Genesee/Finger Lakes Regional Planning Commission, municipal code enforcement officials	N/A

Livingston County Housing Needs Assessment & Market Analysis

Appendices

Prepared by:



Appendix 1: Dwelling Type Definitions

The “dwelling type” classifications used in the County’s tax data are defined by the New York State Office of Real Property Services.¹ Definitions are provided below, in order of that property type’s prevalence in Livingston County. Assessors record the best description of the overall use of a particular parcel. Images are from Google Maps photos of Livingston County properties or from the websites of property managers.

One Family Year-Round Residence: A one family dwelling constructed for year-round occupancy (adequate insulation, heating, etc.).



Rural Residence with Acreage: Year-round residence with 10+ acres of land and have up to three year-round dwelling units.



¹ <https://www.tax.ny.gov/research/property/assess/manuals/prclas.htm>, https://www.tax.ny.gov/pdf/publications/orpts/manuals/rfv_manual_published.pdf.

Mobile Home: A portable structure built on a chassis and used as a permanent dwelling unit.



Two Family Year-Round Residence: A two family dwelling constructed for year-round occupancy.



Seasonal Residences: Dwelling units generally used for seasonal occupancy; not constructed for year-round occupancy (inadequate insulation, heating, etc.).



Primarily residential, also used in agricultural production: A rural residence with acreage (see above) that the assessor determined to be primarily residential but also used for agricultural purposes.



Apartments



Recreational use: A rural residence with acreage (see above) that the assessor determined to be primarily for recreational use. (Most such addresses in Livingston County reveal heavily wooded parcels through which the residential structures are not very visible.)

Downtown row type: Usually a two or three story older structure with retail sales/services on the first floor and offices and/or apartments on the upper floors; little or no on-site parking; with a common wall. The building is readily adaptable, with little physical change, for more than one use or purpose.



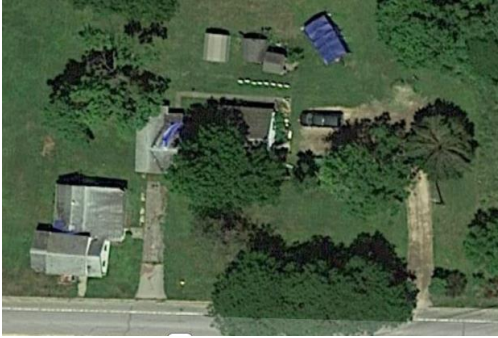
Three Family Year-Round residence: A three family dwelling constructed for year-round occupancy.



Downtown Row Type (detached): Usually a two or three story older structure with retail sales/services on the first floor and offices and/or apartments on the upper floors; little or no on-site parking; detached rather than with common wall. The building is readily adaptable, with little physical change, for more than one use or purpose.



Residential – Multi-Purpose/Multi-Structure: Can be either “multiple residences” (see below) or “residence with incidental commercial use” (see below), but the assessor has not indicated the specific type within this code category.



Mobile Home Parks (trailer parks, trail courts): The mobile homes are usually owner occupied but the land and facilities are rented or leased.



Converted Residence: A building usually located in a residential area, which has been partially converted or adapted for office space (e.g., a doctor's office with an apartment upstairs).



Residence with Incidental Commercial Use: A residence which has been partially converted or adapted for commercial use (e.g. residence with small office in basement). Primary use is residential.



Inns, Lodges, Boarding/Rooming/Tourist/Fraternity/Sorority Houses: Sleeping accommodations with or without meals or kitchen privileges.



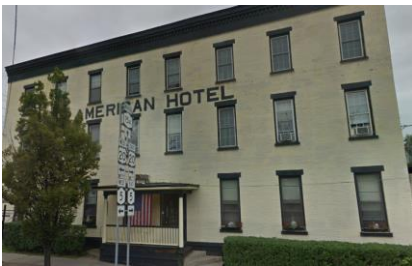
Multiple Residences: Refers to more than one residential dwelling on one parcel, and are typically a mixture of one-, two-, or three-family year-round residences.



Multiple Mobile Homes: More than one mobile home on one parcel of land; not a commercial enterprise.



Hotel



Motel



Homes for the Aged: In Livingston County, these parcels include Morgan Estates Assisted Living, Alpine Manor Home for Adults, Conesus Lake Nursing Home, Avon Nursing Facility, the Kings Daughters Home, and an ARC-run facility on Turtle Rock Road in the Town of Livonia.



Estate: A residential property of not less than 5 acres with a luxurious residence and auxiliary buildings.



Appendix 2: Dwelling Types by Municipality

Town of Avon		
Dwelling Type	#	%
One Family Year-Round Residence	844	89.1%
Rural Residence with Acreage	48	5.1%
Mobile Home	7	0.7%
Two Family Year-Round Residence	17	1.8%
Primary residential, also used in agricultural production	8	0.8%
Apartments	7	0.7%
Three Family Year-Round Residence	6	0.6%
Mobile Home Parks (trailer parks, trail courts)	3	0.3%
Converted Residence	2	0.2%
Inns, Lodges, Boarding/Rooming/Tourist/Fraternity/Sorority Houses	1	0.1%
Resident (Vacant)	1	0.1%
Motel	3	0.3%

Source: 2019 County Tax Parcel Data

Town of Caledonia		
Dwelling Type	#	%
One Family Year-Round Residence	547	88.9%
Rural Residence with Acreage	23	3.7%
Mobile Home	11	1.8%
Two Family Year-Round Residence	4	0.7%
Seasonal Residences	1	0.2%
Primary residential, also used in agricultural production	19	3.1%
Apartments	1	0.2%
Three Family Year-Round Residence	1	0.2%
Residential - Multi-Purpose/Multi-Structure	2	0.3%
Mobile Home Parks (trailer parks, trail courts)	4	0.7%
Converted Residence	1	0.2%
Estate	1	0.2%

Source: 2019 County Tax Parcel Data

Town of Conesus		
Dwelling Type	#	%
One Family Year-Round Residence	830	72.9%
Rural Residence with Acreage	147	12.9%
Mobile Home	89	7.8%
Two Family Year-Round Residence	4	0.4%
Seasonal Residences	54	4.7%
Primary residential, also used in agricultural production	4	0.4%
Apartments	2	0.2%
Residential - Multi-Purpose/Multi-Structure	2	0.2%
Mobile Home Parks (trailer parks, trail courts)	1	0.1%
Residence with Incidental Commercial Use	2	0.2%
Resident (Vacant)	2	0.2%
Multiple Mobile Homes	1	0.1%

Source: 2019 County Tax Parcel Data

Town of Geneseo		
Dwelling Type	#	%
One Family Year-Round Residence	749	77.2%
Mobile Home	6	0.6%
Two Family Year-Round Residence	26	2.7%
Seasonal Residences	67	6.9%
Primary residential, also used in agricultural production	36	3.7%
Apartments	4	0.4%
Recreational Use	68	7.0%
Three Family Year-Round Residence	1	0.1%
Downtown Row Type (detached)	2	0.2%
Residential - Multi-Purpose/Multi-Structure	4	0.4%
Mobile Home Parks (trailer parks, trail courts)	1	0.1%
Residence with Incidental Commercial Use	1	0.1%
Multiple Residences	3	0.3%
Homes for the Aged	1	0.1%
Estate	1	0.1%

Source: 2019 County Tax Parcel Data

Town of Groveland		
Dwelling Type	#	%
One Family Year-Round Residence	442	72.0%
Rural Residence with Acreage	1	0.2%
Mobile Home	18	2.9%
Two Family Year-Round Residence	16	2.6%
Seasonal Residences	43	7.0%
Primary residential, also used in agricultural production	23	3.7%
Apartments	2	0.3%
Recreational Use	60	9.8%
Downtown Row Type (with common wall)	1	0.2%
Three Family Year-Round Residence	2	0.3%
Multiple Residences	5	0.8%
Estate	1	0.2%

Source: 2019 County Tax Parcel Data

Town of Leicester		
Dwelling Type	#	%
One Family Year-Round Residence	426	79.3%
Mobile Home	44	8.2%
Two Family Year-Round Residence	14	2.6%
Primary residential, also used in agricultural production	9	1.7%
Apartments	5	0.9%
Recreational Use	19	3.5%
Three Family Year-Round Residence	1	0.2%
Residential - Multi-Purpose/Multi-Structure	5	0.9%
Mobile Home Parks (trailer parks, trail courts)	3	0.6%
Residence with Incidental Commercial Use	6	1.1%
Resident (Vacant)	5	0.9%

Source: 2019 County Tax Parcel Data

Town of Lima		
Dwelling Type	#	%
One Family Year-Round Residence	572	84.1%
Rural Residence with Acreage	62	9.1%
Mobile Home	7	1.0%
Two Family Year-Round Residence	17	2.5%
Primary residential, also used in agricultural production	8	1.2%
Apartments	5	0.7%
Three Family Year-Round Residence	1	0.1%
Residential - Multi-Purpose/Multi-Structure	2	0.3%
Mobile Home Parks (trailer parks, trail courts)	2	0.3%
Residence with Incidental Commercial Use	1	0.1%
Resident (Vacant)	2	0.3%
Homes for the Aged	1	0.1%

Source: 2019 County Tax Parcel Data

Town of Livonia		
Dwelling Type	#	%
One Family Year-Round Residence	2000	82.4%
Rural Residence with Acreage	138	5.7%
Mobile Home	107	4.4%
Two Family Year-Round Residence	44	1.8%
Seasonal Residences	82	3.4%
Primary residential, also used in agricultural production	5	0.2%
Apartments	11	0.5%
Downtown Row Type (with common wall)	1	0.0%
Three Family Year-Round Residence	3	0.1%
Downtown Row Type (detached)	6	0.2%
Residential - Multi-Purpose/Multi-Structure	12	0.5%
Mobile Home Parks (trailer parks, trail courts)	8	0.3%
Converted Residence	4	0.2%
Residence with Incidental Commercial Use	1	0.0%
Resident (Vacant)	2	0.1%
Hotel	1	0.0%
Homes for the Aged	2	0.1%

Source: 2019 County Tax Parcel Data

Town of Mount Morris		
Dwelling Type	#	%
One Family Year-Round Residence	247	57.2%
Rural Residence with Acreage	83	19.2%
Mobile Home	49	11.3%
Two Family Year-Round Residence	8	1.9%
Seasonal Residences	4	0.9%
Primary residential, also used in agricultural production	34	7.9%
Apartments	1	0.2%
Downtown Row Type (detached)	1	0.2%
Residential - Multi-Purpose/Multi-Structure	1	0.2%
Mobile Home Parks (trailer parks, trail courts)	1	0.2%
Converted Residence	1	0.2%
Multitple Mobile Homes	1	0.2%
Motel	1	0.2%

Source: 2019 County Tax Parcel Data

Town of North Dansville		
Dwelling Type	#	%
One Family Year-Round Residence	199	74.0%
Rural Residence with Acreage	29	10.8%
Mobile Home	25	9.3%
Two Family Year-Round Residence	3	1.1%
Primary residential, also used in agricultural production	3	1.1%
Apartments	1	0.4%
Three Family Year-Round Residence	1	0.4%
Mobile Home Parks (trailer parks, trail courts)	7	2.6%
Converted Residence	1	0.4%

Source: 2019 County Tax Parcel Data

Town of Nunda		
Dwelling Type	#	%
One Family Year-Round Residence	355	52.6%
Rural Residence with Acreage	111	16.4%
Mobile Home	134	19.9%
Two Family Year-Round Residence	7	1.0%
Seasonal Residences	24	3.6%
Primary residential, also used in agricultural production	37	5.5%
Apartments	1	0.1%
Recreational Use	1	0.1%
Three Family Year-Round Residence	1	0.1%
Mobile Home Parks (trailer parks, trail courts)	1	0.1%
Converted Residence	1	0.1%
Multiple Mobile Homes	2	0.3%

Source: 2019 County Tax Parcel Data

Town of Ossian		
Dwelling Type	#	%
One Family Year-Round Residence	195	55.2%
Rural Residence with Acreage	85	24.1%
Mobile Home	18	5.1%
Two Family Year-Round Residence	1	0.3%
Seasonal Residences	51	14.4%
Primary residential, also used in agricultural production	2	0.6%
Three Family Year-Round Residence	1	0.3%

Source: 2019 County Tax Parcel Data

Town of Portage		
Dwelling Type	#	%
One Family Year-Round Residence	176	55.5%
Rural Residence with Acreage	46	14.5%
Mobile Home	62	19.6%
Two Family Year-Round Residence	5	1.6%
Seasonal Residences	9	2.8%
Primary residential, also used in agricultural production	12	3.8%
Three Family Year-Round Residence	1	0.3%
Downtown Row Type (detached)	1	0.3%
Multitple Mobile Homes	5	1.6%

Source: 2019 County Tax Parcel Data

Town of Sparta		
Dwelling Type	#	%
One Family Year-Round Residence	375	60.3%
Rural Residence with Acreage	122	19.6%
Mobile Home	95	15.3%
Two Family Year-Round Residence	3	0.5%
Seasonal Residences	5	0.8%
Primary residential, also used in agricultural production	19	3.1%
Residential - Multi-Purpose/Multi-Structure	3	0.5%

Source: 2019 County Tax Parcel Data

Town of Springwater		
Dwelling Type	#	%
One Family Year-Round Residence	585	56.1%
Rural Residence with Acreage	192	18.4%
Mobile Home	170	16.3%
Two Family Year-Round Residence	7	0.7%
Seasonal Residences	69	6.6%
Apartments	4	0.4%
Downtown Row Type (with common wall)	2	0.2%
Three Family Year-Round Residence	2	0.2%
Downtown Row Type (detached)	1	0.1%
Residential - Multi-Purpose/Multi-Structure	4	0.4%
Mobile Home Parks (trailer parks, trail courts)	2	0.2%
Converted Residence	3	0.3%
Multitple Mobile Homes	1	0.1%
Motel	1	0.1%

Source: 2019 County Tax Parcel Data

Town of West Sparta		
Dwelling Type	#	%
One Family Year-Round Residence	288	58.7%
Rural Residence with Acreage	93	18.9%
Mobile Home	85	17.3%
Two Family Year-Round Residence	2	0.4%
Seasonal Residences	19	3.9%
Residential - Multi-Purpose/Multi-Structure	2	0.4%
Mobile Home Parks (trailer parks, trail courts)	1	0.2%
Multitple Mobile Homes	1	0.2%

Source: 2019 County Tax Parcel Data

Town of York		
Dwelling Type	#	%
One Family Year-Round Residence	950	83.3%
Mobile Home	65	5.7%
Two Family Year-Round Residence	34	3.0%
Seasonal Residences	2	0.2%
Primary residential, also used in agricultural production	33	2.9%
Apartments	1	0.1%
Recreational Use	23	2.0%
Downtown Row Type (with common wall)	1	0.1%
Three Family Year-Round Residence	6	0.5%
Downtown Row Type (detached)	2	0.2%
Residential - Multi-Purpose/Multi-Structure	11	1.0%
Mobile Home Parks (trailer parks, trail courts)	2	0.2%
Residence with Incidental Commercial Use	7	0.6%
Multiple Residences	2	0.2%
Resident (Vacant)	1	0.1%

Source: 2019 County Tax Parcel Data

Village of Avon		
Dwelling Type	#	%
One Family Year-Round Residence	889	87.5%
Rural Residence with Acreage	1	0.1%
Two Family Year-Round Residence	61	6.0%
Apartments	28	2.8%
Downtown Row Type (with common wall)	5	0.5%
Three Family Year-Round Residence	13	1.3%
Downtown Row Type (detached)	16	1.6%
Residence with Incidental Commercial Use	1	0.1%
Hotel	1	0.1%
Homes for the Aged	1	0.1%

Source: 2019 County Tax Parcel Data

Village of Caledonia		
Dwelling Type	#	%
One Family Year-Round Residence	677	87.1%
Rural Residence with Acreage	3	0.4%
Two Family Year-Round Residence	43	5.5%
Apartments	13	1.7%
Downtown Row Type (with common wall)	20	2.6%
Three Family Year-Round Residence	10	1.3%
Downtown Row Type (detached)	5	0.6%
Residential - Multi-Purpose/Multi-Structure	2	0.3%
Converted Residence	3	0.4%
Residence with Incidental Commercial Use	1	0.1%

Source: 2019 County Tax Parcel Data

Village of Dansville		
Dwelling Type	#	%
One Family Year-Round Residence	1318	83.4%
Mobile Home	5	0.3%
Two Family Year-Round Residence	108	6.8%
Seasonal Residences	1	0.1%
Apartments	48	3.0%
Downtown Row Type (with common wall)	48	3.0%
Three Family Year-Round Residence	29	1.8%
Downtown Row Type (detached)	7	0.4%
Residential - Multi-Purpose/Multi-Structure	1	0.1%
Mobile Home Parks (trailer parks, trail courts)	2	0.1%
Converted Residence	7	0.4%
Inns, Lodges, Boarding/Rooming/Tourist/Fraternity/Sorority Houses	3	0.2%
Hotel	1	0.1%
Motel	2	0.1%
Homes for the Aged	1	0.1%

Source: 2019 County Tax Parcel Data

Village of Geneseo		
Dwelling Type	#	%
One Family Year-Round Residence	847	80.7%
Two Family Year-Round Residence	95	9.1%
Primary residential, also used in agricultural production	1	0.1%
Apartments	32	3.1%
Downtown Row Type (with common wall)	6	0.6%
Three Family Year-Round Residence	9	0.9%
Downtown Row Type (detached)	26	2.5%
Converted Residence	9	0.9%
Inns, Lodges, Boarding/Rooming/Tourist/Fraternity/Sorority Houses	14	1.3%
Multiple Residences	5	0.5%
Hotel	3	0.3%
Estate	2	0.2%

Source: 2019 County Tax Parcel Data

Village of Leicester		
Dwelling Type	#	%
One Family Year-Round Residence	153	85.5%
Mobile Home	8	4.5%
Two Family Year-Round Residence	7	3.9%
Three Family Year-Round Residence	3	1.7%
Downtown Row Type (detached)	3	1.7%
Residential - Multi-Purpose/Multi-Structure	2	1.1%
Residence with Incidental Commercial Use	1	0.6%
Multiple Residences	1	0.6%
Resident (Vacant)	1	0.6%

Source: 2019 County Tax Parcel Data

Village of Lima		
Dwelling Type	#	%
One Family Year-Round Residence	546	91.3%
Two Family Year-Round Residence	15	2.5%
Apartments	11	1.8%
Downtown Row Type (with common wall)	12	2.0%
Three Family Year-Round Residence	2	0.3%
Downtown Row Type (detached)	5	0.8%
Mobile Home Parks (trailer parks, trail courts)	2	0.3%
Converted Residence	2	0.3%
Resident (Vacant)	2	0.3%
Hotel	1	0.2%

Source: 2019 County Tax Parcel Data

Village of Mount Morris		
Dwelling Type	#	%
One Family Year-Round Residence	749	77.3%
Rural Residence with Acreage	1	0.1%
Mobile Home	27	2.8%
Two Family Year-Round Residence	85	8.8%
Apartments	20	2.1%
Downtown Row Type (with common wall)	24	2.5%
Three Family Year-Round Residence	19	2.0%
Downtown Row Type (detached)	26	2.7%
Residential - Multi-Purpose/Multi-Structure	2	0.2%
Mobile Home Parks (trailer parks, trail courts)	8	0.8%
Converted Residence	3	0.3%
Inns, Lodges, Boarding/Rooming/Tourist/Fraternity/Sorority Houses	3	0.3%
Hotel	1	0.1%
Motel	1	0.1%

Source: 2019 County Tax Parcel Data

Village of Nunda		
Dwelling Type	#	%
One Family Year-Round Residence	321	75.5%
Mobile Home	27	6.4%
Two Family Year-Round Residence	35	8.2%
Primary residential, also used in agricultural production	1	0.2%
Apartments	7	1.6%
Downtown Row Type (with common wall)	13	3.1%
Three Family Year-Round Residence	12	2.8%
Downtown Row Type (detached)	8	1.9%
Residential - Multi-Purpose/Multi-Structure	1	0.2%

Source: 2019 County Tax Parcel Data

Appendix 3: Adopted Real Property Tax Exemptions

MRB Group recommended that Livingston County local governments adopt and promote the use of relevant Real Property Tax Law 485 exemptions to support development of desired housing products. The following table lists real property tax exemptions applicable to housing development that have been adopted to date by the County and various towns, villages, and school districts.

Adopted Real Property Tax Exemptions Applicable to Housing Development	
Exemption Class	Benefit
Livingston County	
RPTL §485-n	12-year exemption (years 9-12 phase-in) on increase in assessed value of property created, converted, expanded, or rehabilitated
PHFL §§125, 127	Partial exemption for new or rehabilitated multiple-dwelling low-income or moderate-income housing owned by redevelopment companies
PHFL §577(3)	Partial exemption for low-income-housing properties under the control of a housing development fund company that is a subsidiary of the NYS Urban Development Corporation
RPTL §422	Exemption for not-for-profit-owned properties serving as housing for educational institutions, child care institutions, hospitals, nursing homes, handicapped or aged persons of low income, etc.
Town of Avon	
RPTL §485-n	12-year exemption (years 9-12 phase-in) on increase in assessed value of property created, converted, expanded, or rehabilitated
PHFL §§125, 127	Partial exemption for new or rehabilitated multiple-dwelling low-income or moderate-income housing owned by redevelopment companies
Town of Caledonia	
RPTL §485-n	12-year exemption (years 9-12 phase-in) on increase in assessed value of property created, converted, expanded, or rehabilitated

Source: Livingston County Real Property Tax Services. RPTL: New York State Real Property Tax Law . PHFL: New York State Private Housing Finance Law .

Adopted Real Property Tax Exemptions Applicable to Housing Development (Continued)	
Exemption Class	Benefit
Town of Geneseo	
RPTL §485-n	12-year exemption (years 9-12 phase-in) on increase in assessed value of property created, converted, expanded, or rehabilitated
PHFL §577(3)	Partial exemption for low-income-housing properties under the control of a housing development fund company that is a subsidiary of the NYS Urban Development Corporation
PHFL §§125, 127	Partial exemption for new or rehabilitated multiple-dwelling low-income or moderate-income housing owned by redevelopment companies
RPTL §422	Exemption for not-for-profit-owned properties serving as housing for educational institutions, child care institutions, hospitals, nursing homes, handicapped or aged persons of low income, etc.
Town of Lima	
RPTL §485-n	12-year exemption (years 9-12 phase-in) on increase in assessed value of property created, converted, expanded, or rehabilitated
RPTL §485-a	12-year exemption (years 9-12 phase-in) on increase in assessed value of newly created/rehabilitated/expanded/improved mixed-use properties with residential units, or of non-residential property converted to mixed-use property
Town of Mt. Morris	
RPTL §485-n	12-year exemption (years 9-12 phase-in) on increase in assessed value of property created, converted, expanded, or rehabilitated
RPTL §485-a	12-year exemption (years 9-12 phase-in) on increase in assessed value of newly created/rehabilitated/expanded/improved mixed-use properties with residential units, or of non-residential property converted to mixed-use property
Town of North Dansville	
RPTL §485-n	12-year exemption (years 9-12 phase-in) on increase in assessed value of property created, converted, expanded, or rehabilitated
Town of Nunda	
RPTL §485-n	12-year exemption (years 9-12 phase-in) on increase in assessed value of property created, converted, expanded, or rehabilitated

Source: Livingston County Real Property Tax Services. RPTL: New York State Real Property Tax Law . PHFL: New York State Private Housing Finance Law .

Adopted Real Property Tax Exemptions Applicable to Housing Development (Continued)	
Exemption Class	Benefit
Village of Avon	
RPTL §485-n	12-year exemption (years 9-12 phase-in) on increase in assessed value of property created, converted, expanded, or rehabilitated
RPTL §485-a	12-year exemption (years 9-12 phase-in) on increase in assessed value of newly created/rehabilitated/expanded/improved mixed-use properties with residential units, or of non-residential property converted to mixed-use property
PHFL §§125, 127	Partial exemption for new or rehabilitated multiple-dwelling low-income or moderate-income housing owned by redevelopment companies
Village of Caledonia	
RPTL §485-n	12-year exemption (years 9-12 phase-in) on increase in assessed value of property created, converted, expanded, or rehabilitated
Village of Dansville	
RPTL §485-n	12-year exemption (years 9-12 phase-in) on increase in assessed value of property created, converted, expanded, or rehabilitated
RPTL §485-a	12-year exemption (years 9-12 phase-in) on increase in assessed value of newly created/rehabilitated/expanded/improved mixed-use properties with residential units, or of non-residential property converted to mixed-use property
Village of Geneseo	
RPTL §485-n	12-year exemption (years 9-12 phase-in) on increase in assessed value of property created, converted, expanded, or rehabilitated
PHFL §577(3)	Partial exemption for low-income-housing properties under the control of a housing development fund company that is a subsidiary of the NYS Urban Development Corporation
RPTL §485-a	12-year exemption (years 9-12 phase-in) on increase in assessed value of newly created/rehabilitated/expanded/improved mixed-use properties with residential units, or of non-residential property converted to mixed-use property
Village of Leicester	
RPTL §485-n	12-year exemption (years 9-12 phase-in) on increase in assessed value of property created, converted, expanded, or rehabilitated

Source: Livingston County Real Property Tax Services. RPTL: New York State Real Property Tax Law . PHFL: New York State Private Housing Finance Law .

Adopted Real Property Tax Exemptions Applicable to Housing Development (Continued)	
Exemption Class	Benefit
Village of Lima	
RPTL §485-n	12-year exemption (years 9-12 phase-in) on increase in assessed value of property created, converted, expanded, or rehabilitated
RPTL §485-a	12-year exemption (years 9-12 phase-in) on increase in assessed value of newly created/rehabilitated/expanded/improved mixed-use properties with residential units, or of non-residential property converted to mixed-use property
Village of Livonia	
RPTL §485-n	12-year exemption (years 9-12 phase-in) on increase in assessed value of property created, converted, expanded, or rehabilitated
Village of Mt. Morris	
RPTL §485-n	12-year exemption (years 9-12 phase-in) on increase in assessed value of property created, converted, expanded, or rehabilitated
RPTL §485-a	12-year exemption (years 9-12 phase-in) on increase in assessed value of newly created/rehabilitated/expanded/improved mixed-use properties with residential units, or of non-residential property converted to mixed-use property
Village of Nunda	
RPTL §485-n	12-year exemption (years 9-12 phase-in) on increase in assessed value of property created, converted, expanded, or rehabilitated
RPTL §485-a	12-year exemption (years 9-12 phase-in) on increase in assessed value of newly created/rehabilitated/expanded/improved mixed-use properties with residential units, or of non-residential property converted to mixed-use property

Source: Livingston County Real Property Tax Services. RPTL: New York State Real Property Tax Law . PHFL: New York State Private Housing Finance Law .

Adopted Real Property Tax Exemptions Applicable to Housing Development (Continued)	
Exemption Class	Benefit
Avon Central School District	
RPTL §485-n	12-year exemption (years 9-12 phase-in) on increase in assessed value of property created, converted, expanded, or rehabilitated
Caledonia-Mumford Central School District	
RPTL §485-n	12-year exemption (years 9-12 phase-in) on increase in assessed value of property created, converted, expanded, or rehabilitated
Dansville Central School District	
RPTL §485-n	12-year exemption (years 9-12 phase-in) on increase in assessed value of property created, converted, expanded, or rehabilitated
Geneseo Central School District	
RPTL §485-n	12-year exemption (years 9-12 phase-in) on increase in assessed value of property created, converted, expanded, or rehabilitated
PHFL §577(3)	Partial exemption for low-income-housing properties under the control of a housing development fund company that is a subsidiary of the NYS Urban Development Corporation
Livonia Central School District	
RPTL §485-n	12-year exemption (years 9-12 phase-in) on increase in assessed value of property created, converted, expanded, or rehabilitated
Mt. Morris Central School District	
RPTL §485-n	12-year exemption (years 9-12 phase-in) on increase in assessed value of property created, converted, expanded, or rehabilitated
York Central School District	
RPTL §485-n	12-year exemption (years 9-12 phase-in) on increase in assessed value of property created, converted, expanded, or rehabilitated

Source: Livingston County Real Property Tax Services. RPTL: New York State Real Property Tax Law . PHFL: New York State Private Housing Finance Law .


Appendix 4: Housing and Services Maps by Municipality

Town of Avon

Housing and Services 2019

 Retail / Food Store


 Mini-Mart: Gas and Snacks


 Major Employers


 RTS Bus Routes

 Railroads

 Trails

 Expressway

 State Highway


 County Highway


 Town Road


 Village Road


 Private Road

 Village Boundaries


 Town Boundaries

 Rural Residence

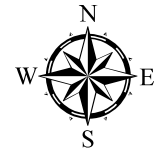
 Single-Family

 Multi-Family, Multiple Res. on 1 Property

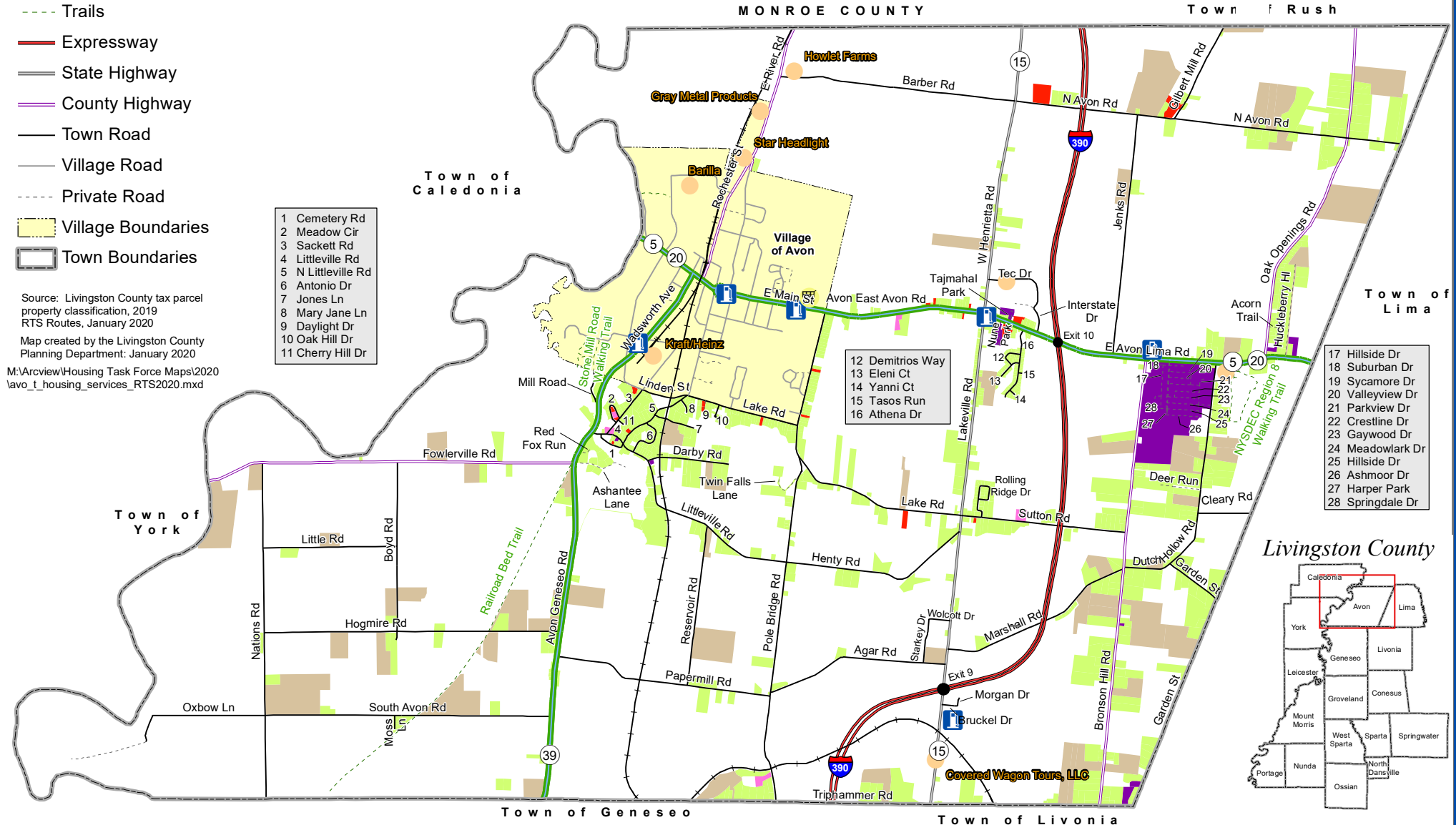
 Apartments

 Mobile Home/Mobile Home Park

*At this time, any residence that is located on a property containing an agricultural operation is not included.

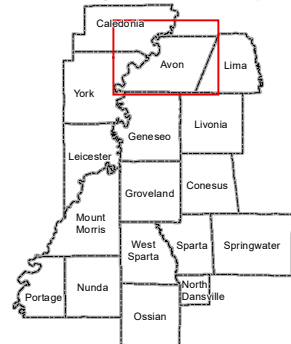


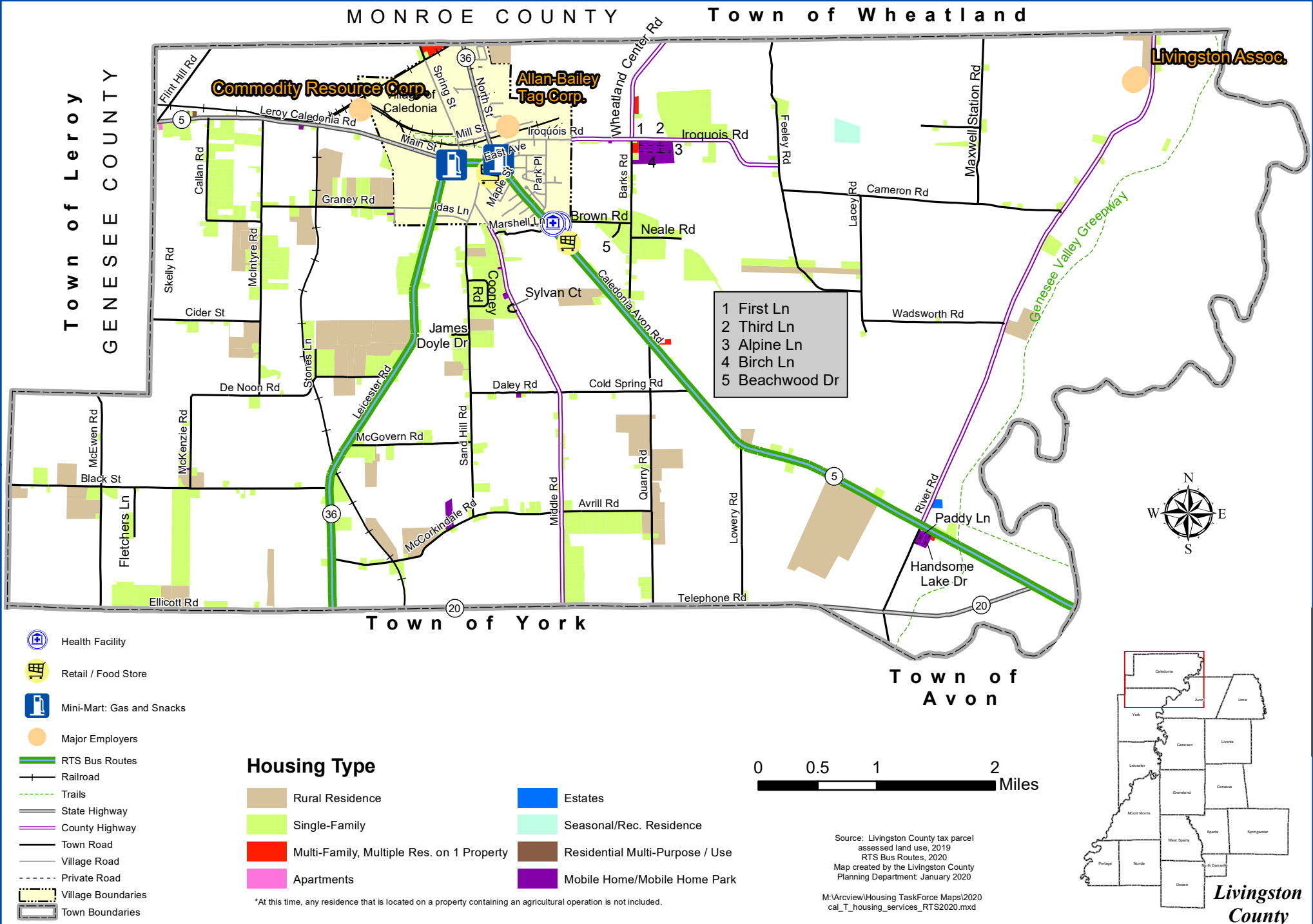
0 0.5 1 2 Miles



Source: Livingston County tax parcel property classification, 2019
 RTS Routes, January 2020
 Map created by the Livingston County Planning Department: January 2020
 M:\Arcview\Housing Task Force Maps\2020 lavo_t_housing_services_RTS2020.mxd

Livingston County

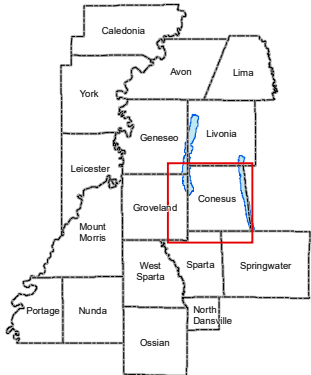




Town of Conesus

Housing and Services 2019

Livingston County



- RTS Bus Routes
- Trails
- Expressway
- State Highway
- County Highway
- Town Road
- Seasonal Road
- Private Road
- Town Boundary

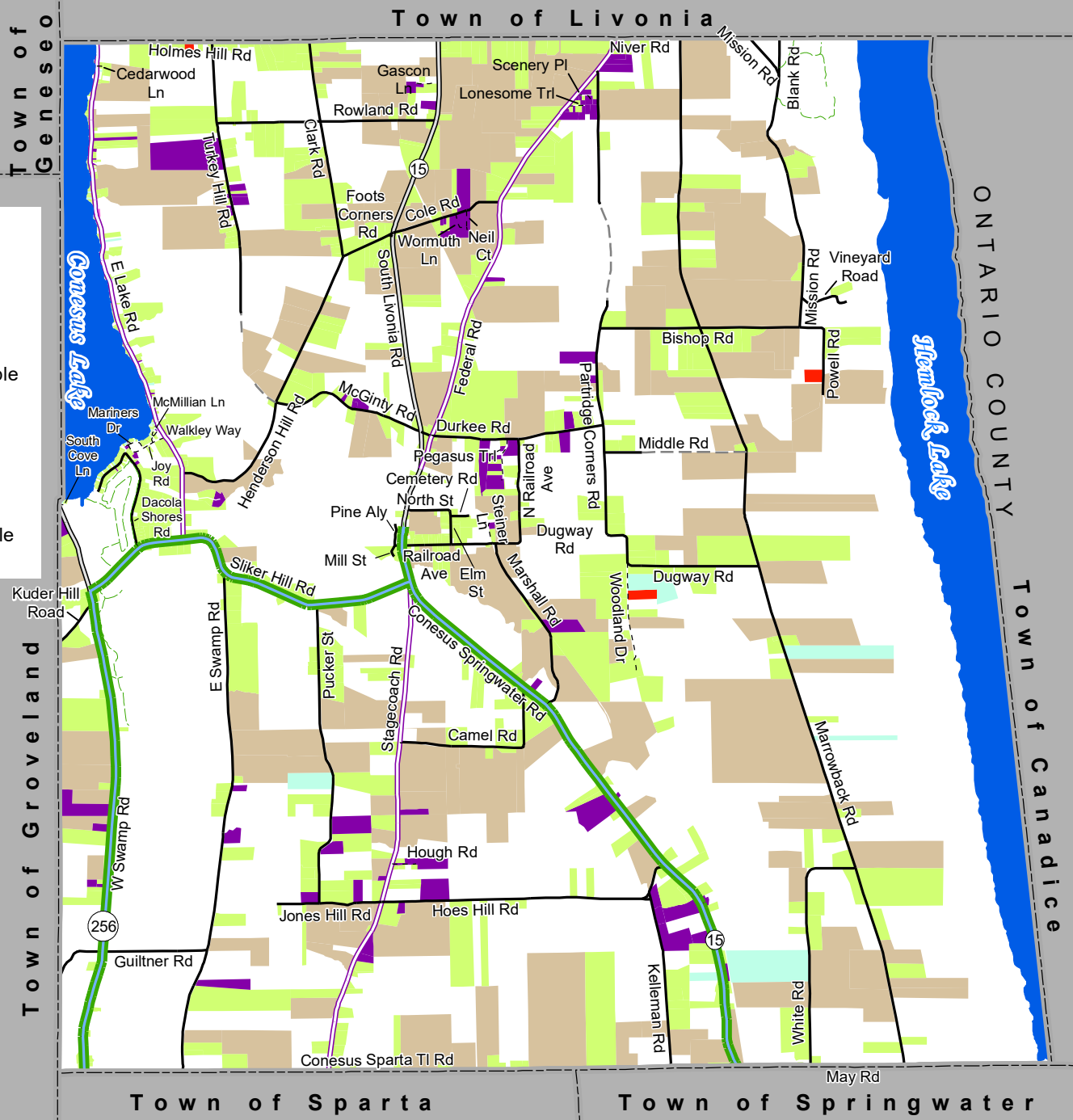
Map prepared by Livingston County
Planning Department: June 2012

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basemap 2012.mxd

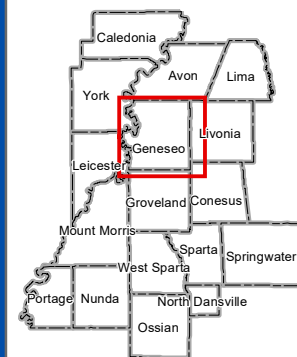
Housing Types














- Rural Residence
- Single-Family
- Multi-Family, Multiple Res. on 1 Property
- Apartments
- Seasonal/Rec. Residence
- Mobile Home/Mobile Home Park

*At this time, any residence that is located on a property containing an agricultural operation is not included.



Livingston County

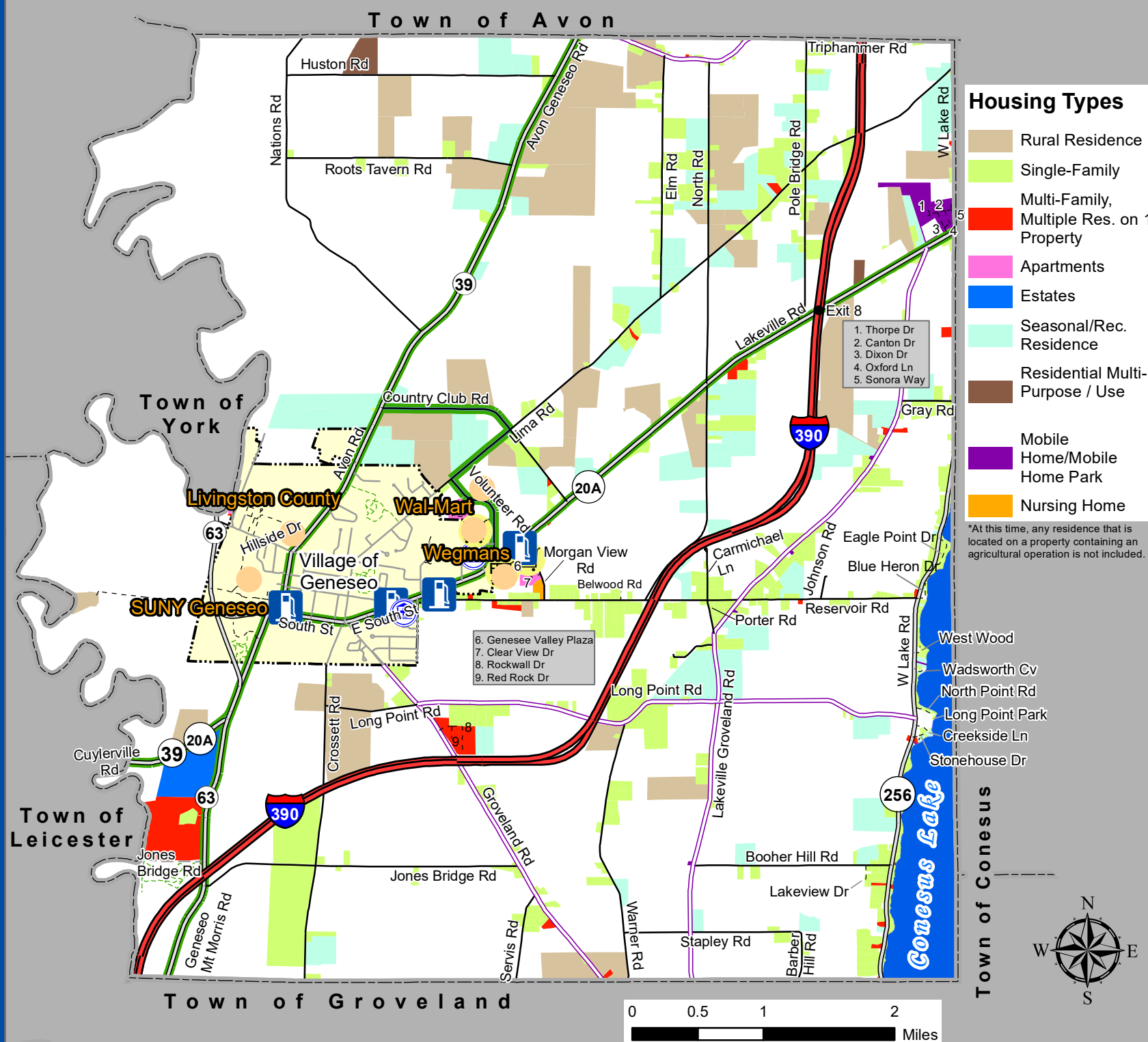


-  Health Facility
-  Retail / Food Store
-  Mini-Mart: Gas and Snacks
-  Major Employers
-  RTS Bus Routes
-  Trails
-  Expressway
-  State Highway
-  County Highway
-  Town Road
-  Village Road
-  Seasonal Road
-  Private Road
- Village Boundaries
- Town Boundaries

Source: Livingston County tax parcel
assessed land use, 2019
RTS Bus Routes, January 2020

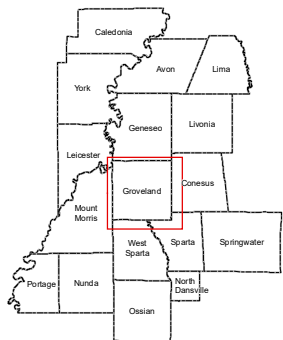
Map Prepared by Livingston County
Planning Department, January 2020

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Town of Groveland Housing and Services 2019

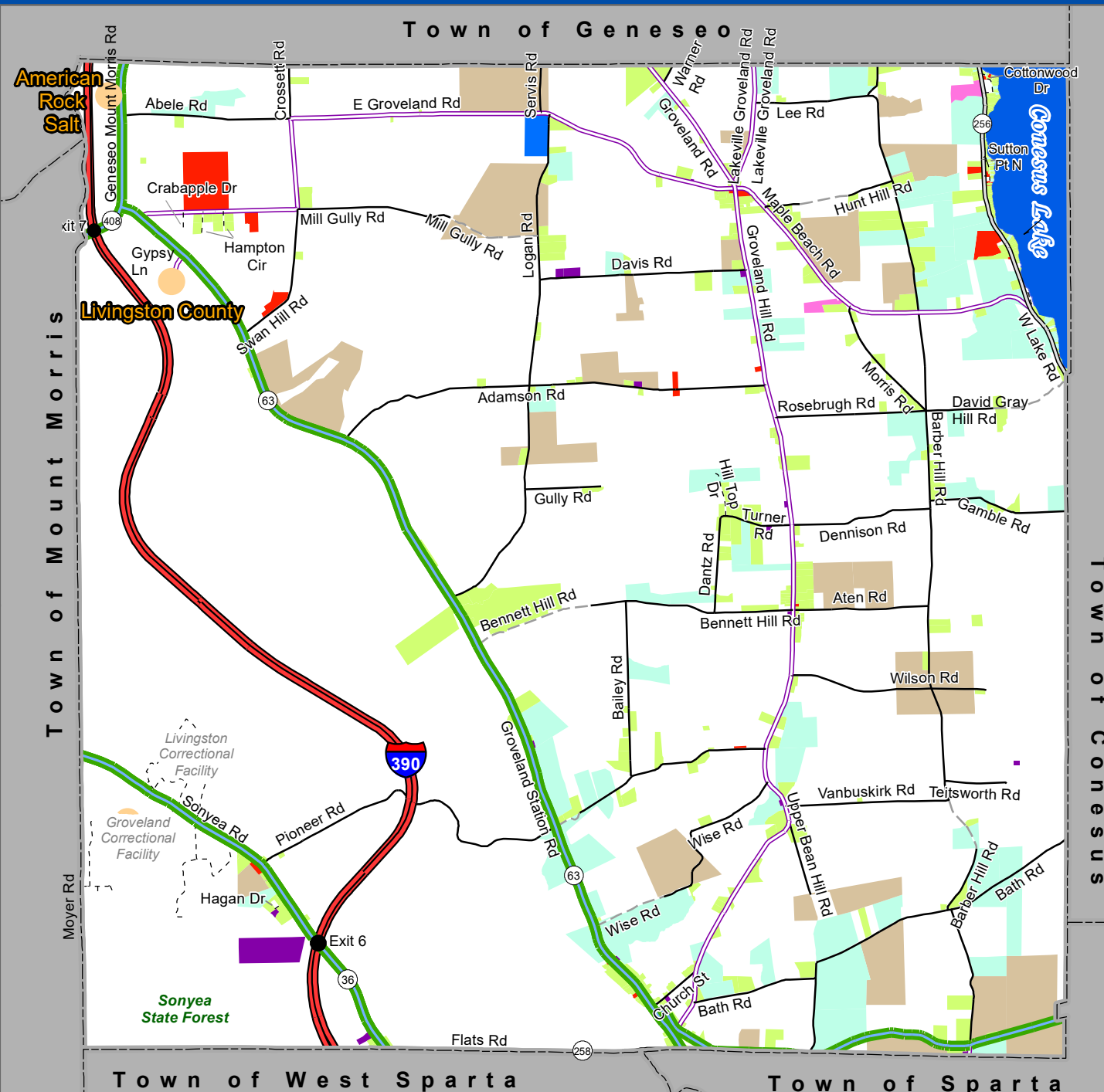
Livingston County



- Major Employers
- RTS Bus Routes
- Expressway
- State Highway
- County Highway
- Town Road
- Village Road
- Seasonal Road
- Private Road
- Town Boundaries

Source: Livingston County tax parcel
assessed land use, 2019
RTS Bus Routes, January 2020
Map Prepared by
Livingston County Planning Department, 01/2019

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Housing Task Force Maps\2020
lgr t housing services RTS2020.mxd

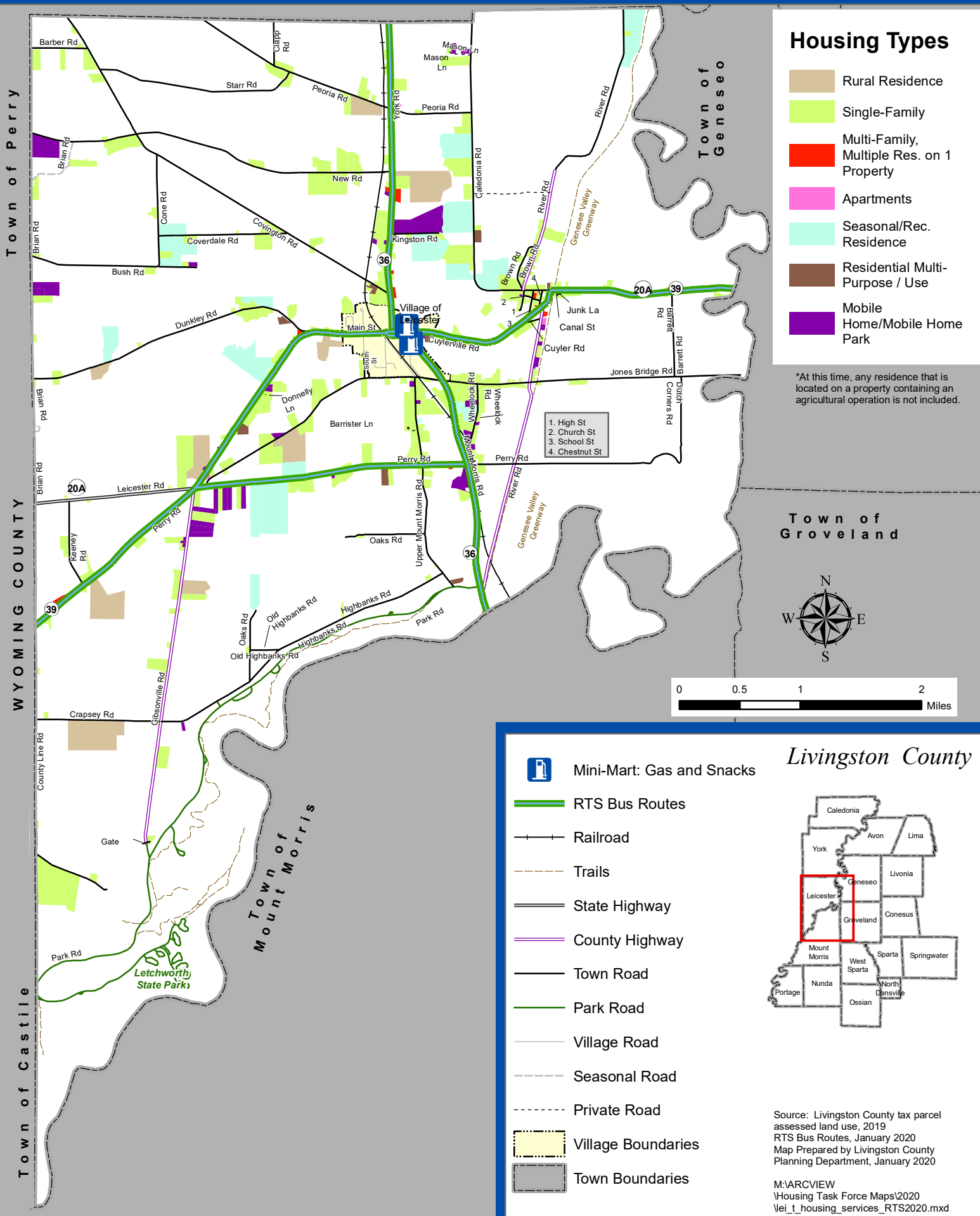


Housing Type

- Rural Residence
- Multi-Family, Multiple Res. on 1 Property
- Estates
- Mobile Home/Mobile Home Park
- Single-Family
- Apartments
- Seasonal/Rec. Residence

*At this time, any residence that is located on a property containing an agricultural operation is not included.

0 0.5 1 2
Miles
















Town of Lima

Housing and Services 2019

Livingston County



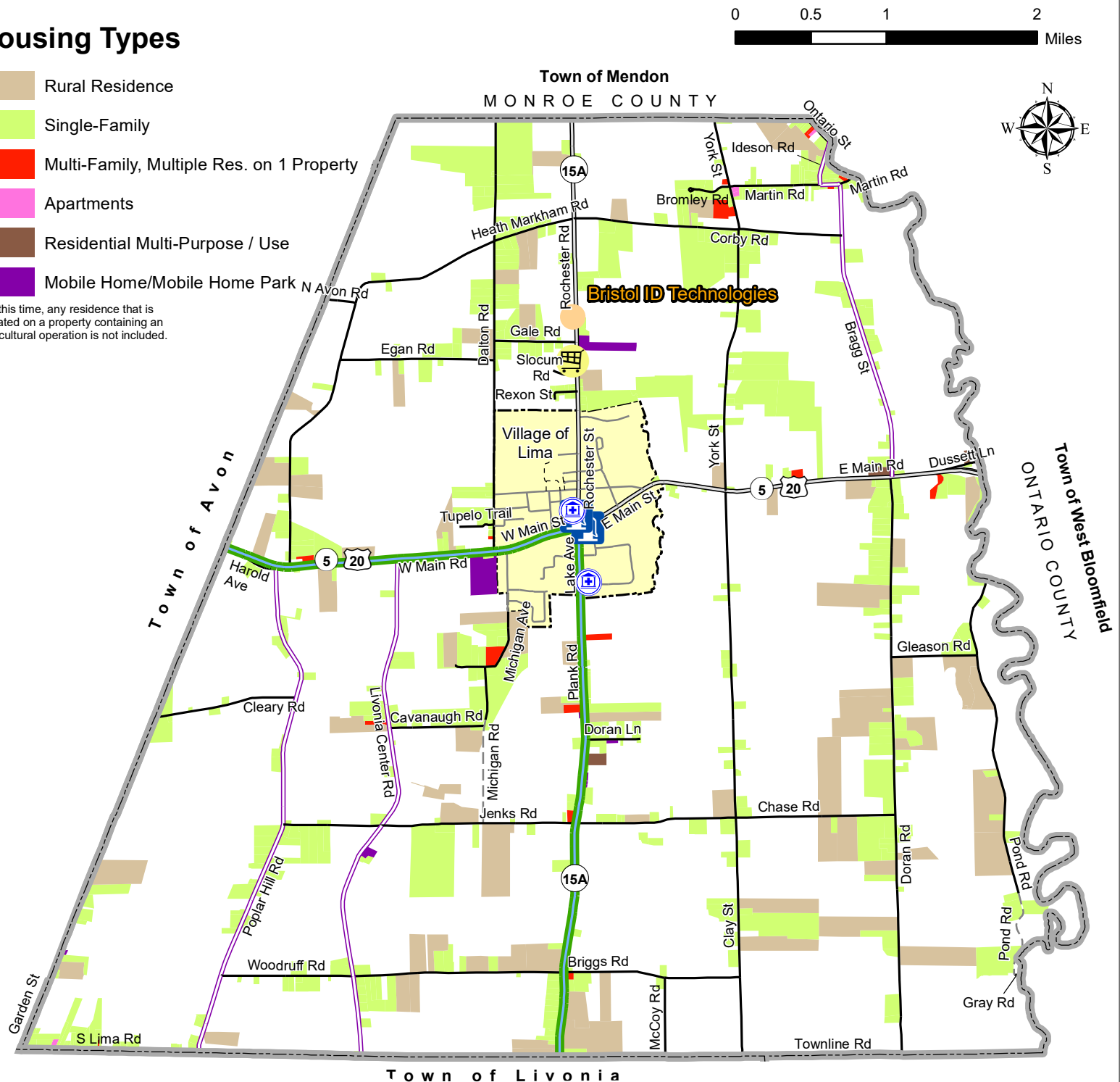
-  Health Facility
-  Retail / Food Store
-  Mini-Mart: Gas and Snacks
-  Major Employers
-  RTS Bus Routes
-  State Highway
-  County Highway
-  Town Road
-  Village Road
-  Seasonal Road
-  Private Road
-  Village Boundary
-  Town Boundaries

Source: Livingston County tax parcel
assessed land use, 2019
RTS Bus Routes, 2020
Map created by the Livingston County
Planning Department: January 2020
M:\Arcview\Housing TaskForce Maps\2020
Lima_T_housing_services_RTS2020.mxd

Housing Types

-  Rural Residence
-  Single-Family
-  Multi-Family, Multiple Res. on 1 Property
-  Apartments
-  Residential Multi-Purpose / Use
-  Mobile Home/Mobile Home Park

*At this time, any residence that is located on a property containing an agricultural operation is not included.



Town of Livonia

Housing and Services 2019

Livingston County

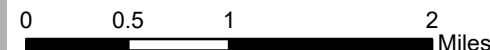
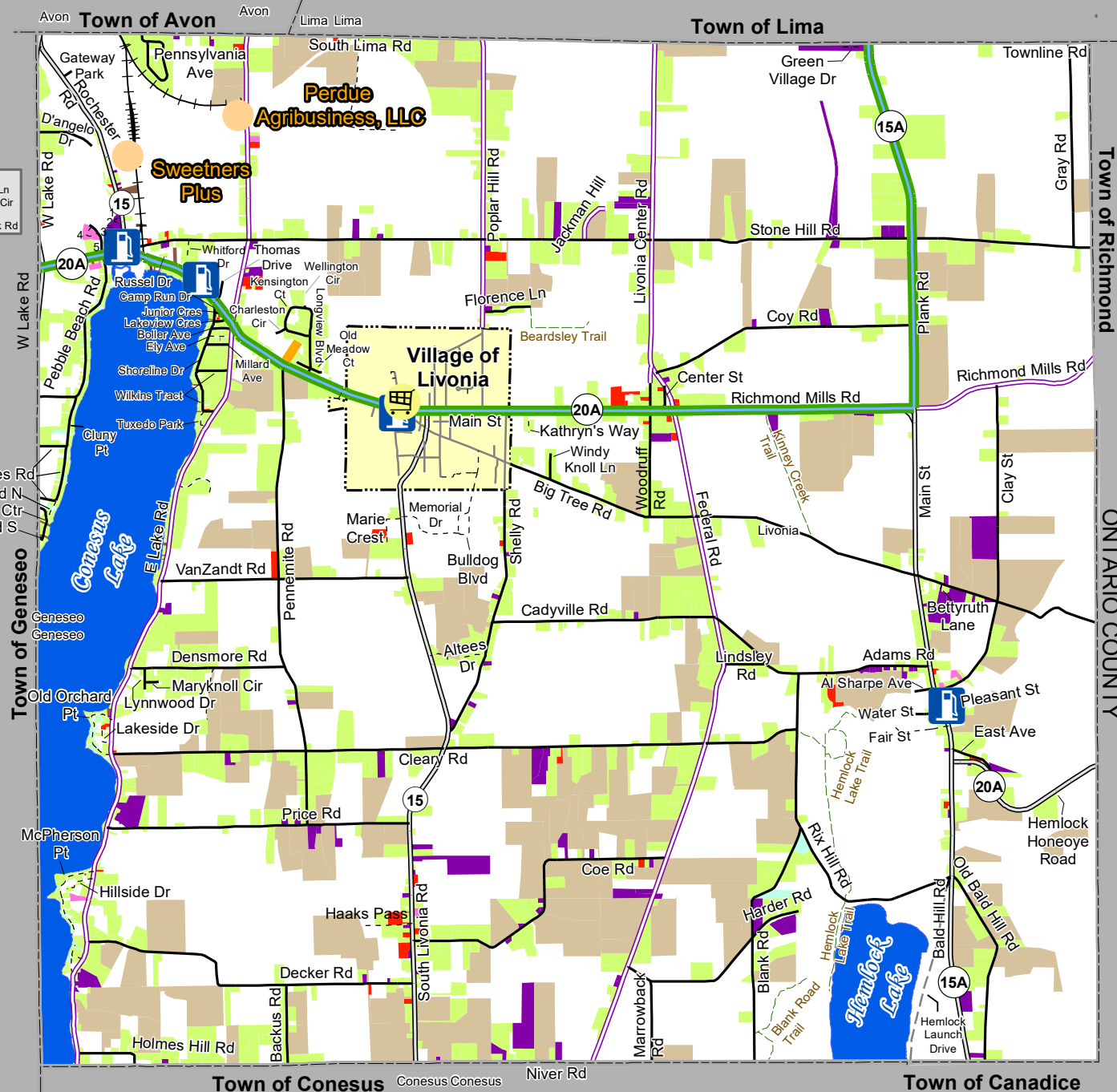


1. Willow Tr
2. Parkwood Ln
3. Creekview Cir
4. Orchid Dr
5. Turtle Rock Rd

- Retail / Food Store
- Mini-Mart: Gas and Snacks
- Major Employers
- RTS Bus Routes
- Railroad
- Trails
- State Highway
- County Highway
- Town Road
- Village Road
- Seasonal Road
- Private Road
- Village Boundaries
- Town Boundaries

Housing Types

- Rural Residence
- Single-Family
- Multi-Family, Multiple Res. on 1 Property
- Apartments
- Estates
- Seasonal/Rec. Residence
- Residential Multi-Purpose / Use
- Mobile Home/Mobile Home Park
- Nursing Homes



Source: Livingston County tax parcel assessed land use, 2019
LATS Bus Routes, January 2020
Map prepared by the Livingston County Planning Department:
January 2020

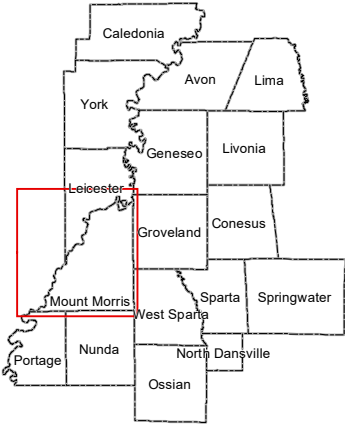
*At this time, any residence that is located on a property containing an agricultural operation is not included.

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Housing Types

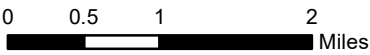
- Rural Residence
- Multi-Family, Multiple Res. on 1 Property
- Seasonal/Rec. Residence
- Mobile Home/Mobile Home Park
- Single-Family
- Apartments
- Residential Multi-Purpose / Use
- Nursing Homes

Livingston County



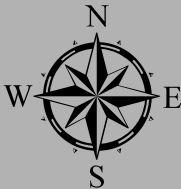
Source: Livingston County tax parcel
assessed land use, 2019
RTS Bus Routes, 01/2020
Map Prepared by Livingston County Planning Department, 01/2020

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Housing Task Force Maps\2020
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Legend

- Retail / Food Store
- Mini-Mart: Gas and Snacks
- Major Employers
- RTS Bus Routes
- Trails
- State Highway
- County Highway
- Town Road
- Village Road
- Seasonal Road
- Private Road
- Village Boundaries
- Town Boundaries



WYOMING
COUNTY

Town of
Castile

Town of Portage

Town of Leicester

Town of Groveland

Town of West Sparta

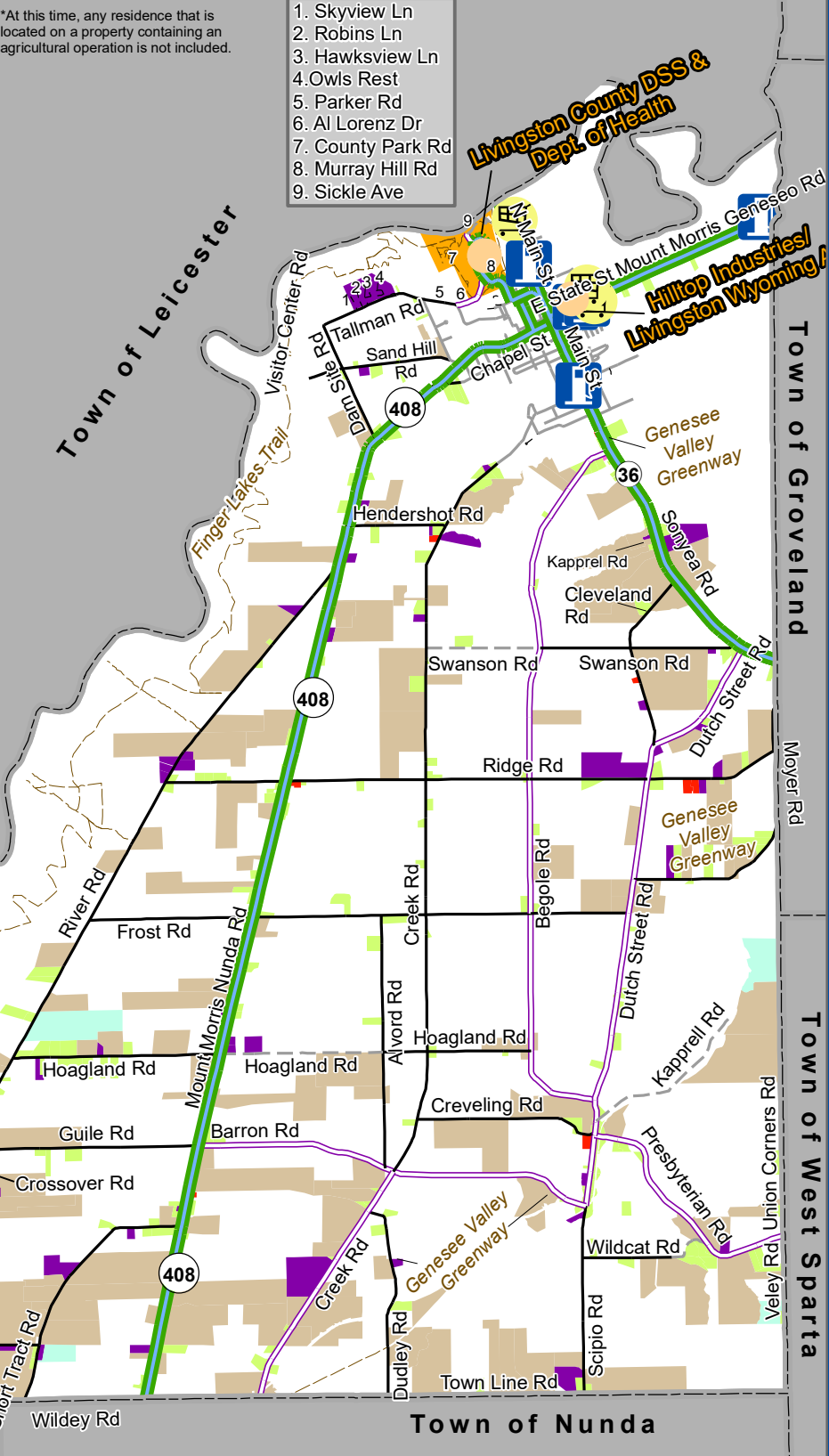
Town of Nunda

*At this time, any residence that is
located on a property containing an
agricultural operation is not included.

1. Skyview Ln
2. Robins Ln
3. Hawkview Ln
4. Owls Rest
5. Parker Rd
6. Al Lorenz Dr
7. County Park Rd
8. Murray Hill Rd
9. Sickie Ave

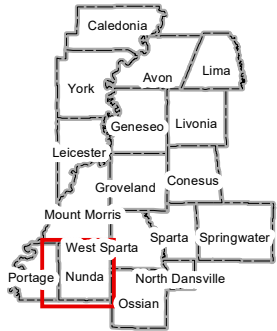
Livingston County DSS &
Dept. of Health

Hilltop Industries/
Livingston Wyoming



Town of Nunda Housing and Services 2019

Livingston County



Legend

- Retail / Food Store
- Mini-Mart: Gas and Snacks
- Major Employers
- RTS Bus Routes
- Trails
- State Highway
- County Highway
- Town Road
- Park Road
- Village Road
- Seasonal Road
- Private Road
- Village Boundaries
- Town Boundaries

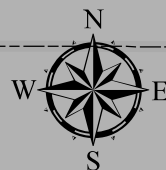
Legend

- Rural Residence
- Single-Family
- Multi-Family, Multiple Res. on 1 Property
- Apartments
- Seasonal/Rec. Residence
- Mobile Home/Mobile Home Park

*At this time, any residence that is located on a property containing an agricultural operation is not included.

1. Main St
2. Erie St
3. North St
4. Mill St
5. Oakland St
6. Fair St
7. Maple St
8. Church St
9. Drake Road

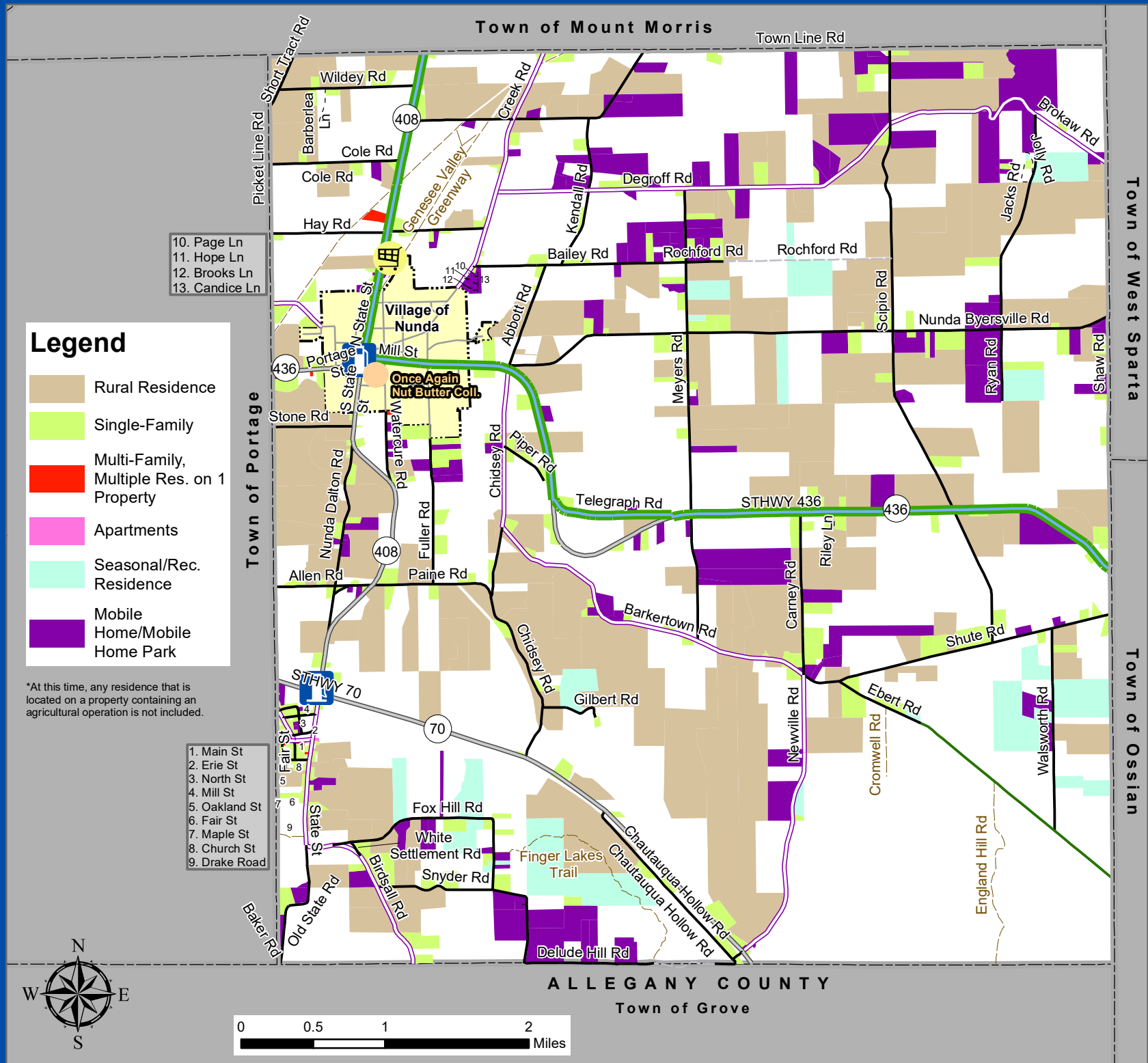
10. Page Ln
11. Hope Ln
12. Brooks Ln
13. Candice Ln



0 0.5 1 2
Miles

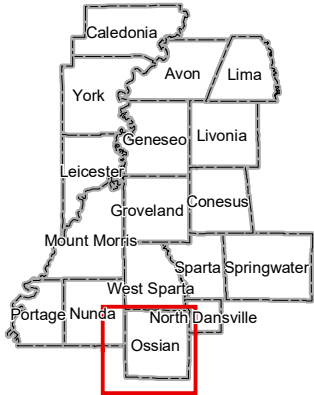
Livingston County tax parcel
assessed land use, 2019
RTS Bus Routes, 01-2020
Map prepared by the
Livingston County Planning Department:
01/2020

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services_RTS2020.mxd



Town of Ossian Housing and Services 2019

Livingston County



- RTS Bus Routes
- Trails
- State Highway
- County Highway
- Town Road
- Village Road
- Private Road
- Park Road
- Town Boundary

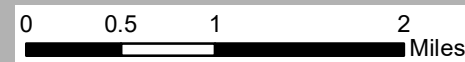
Source: Livingston County tax parcel
assessed land use, 2019
RTS Bus Routes, 01/2020
Map prepared by the Livingston
County Planning Department:
01/2020

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services_RTS2020.mxd

Housing Type

- Rural Residence
- Single-Family
- Multi-Family, Multiple Res. on 1 Property
- Seasonal/Rec. Residence
- Mobile Home/Mobile Home Park

ALLEGANY COUNTY Town of Burns



*At this time, any residence that is
located on a property containing an
agricultural operation is not included.

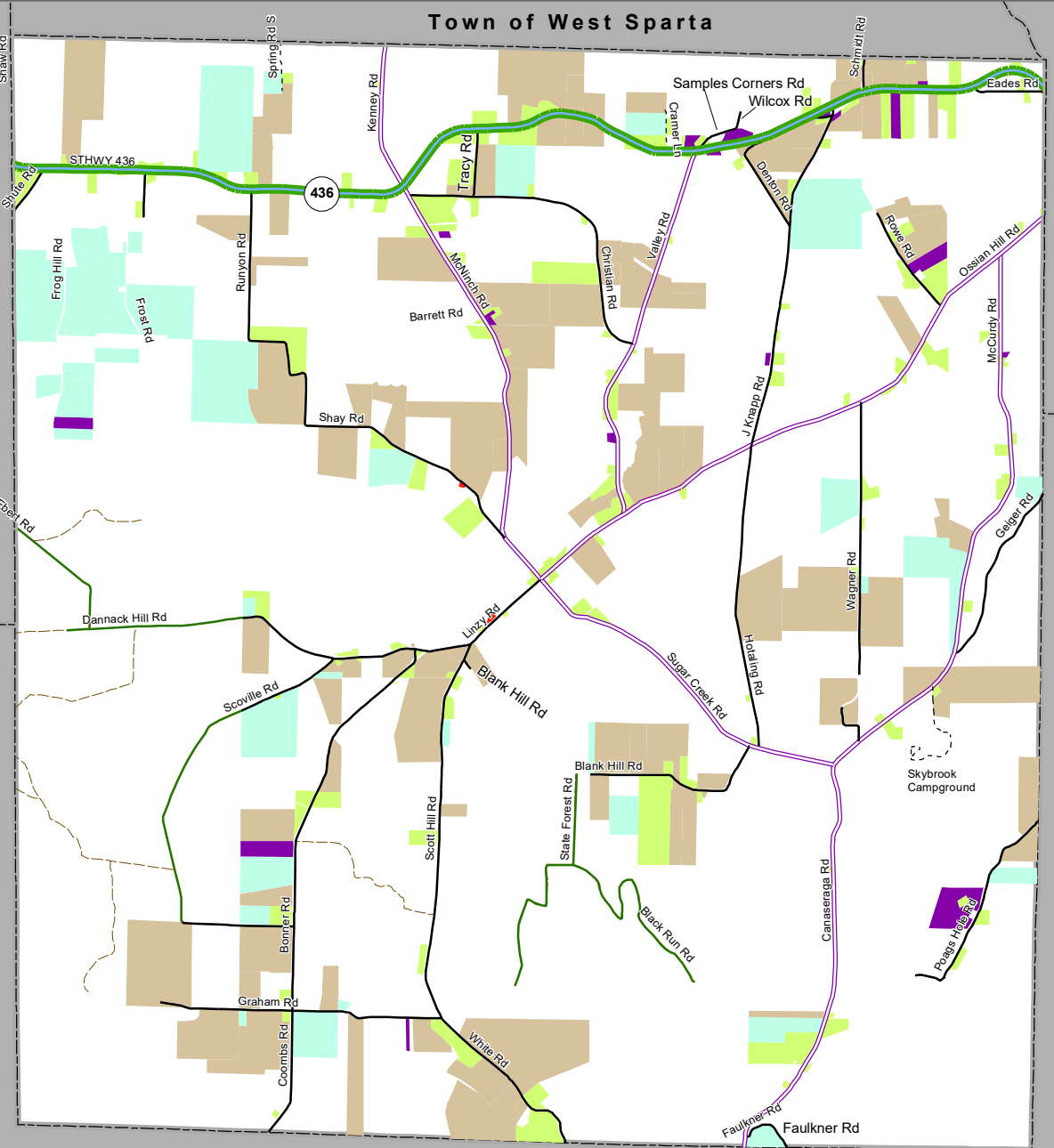


Town of Nunda
TOWN OF GROVE
ALLEGANY COUNTY

Town of West Sparta

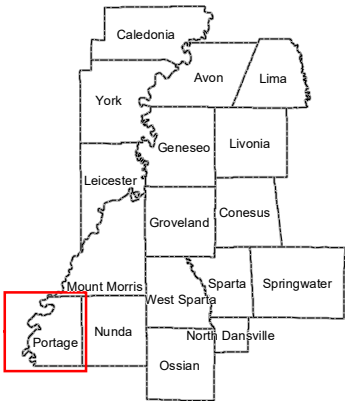
Town of North Dansville

Town of Dansville
STEBEN COUNTY



Town of Portage Housing and Services 2019

Livingston County



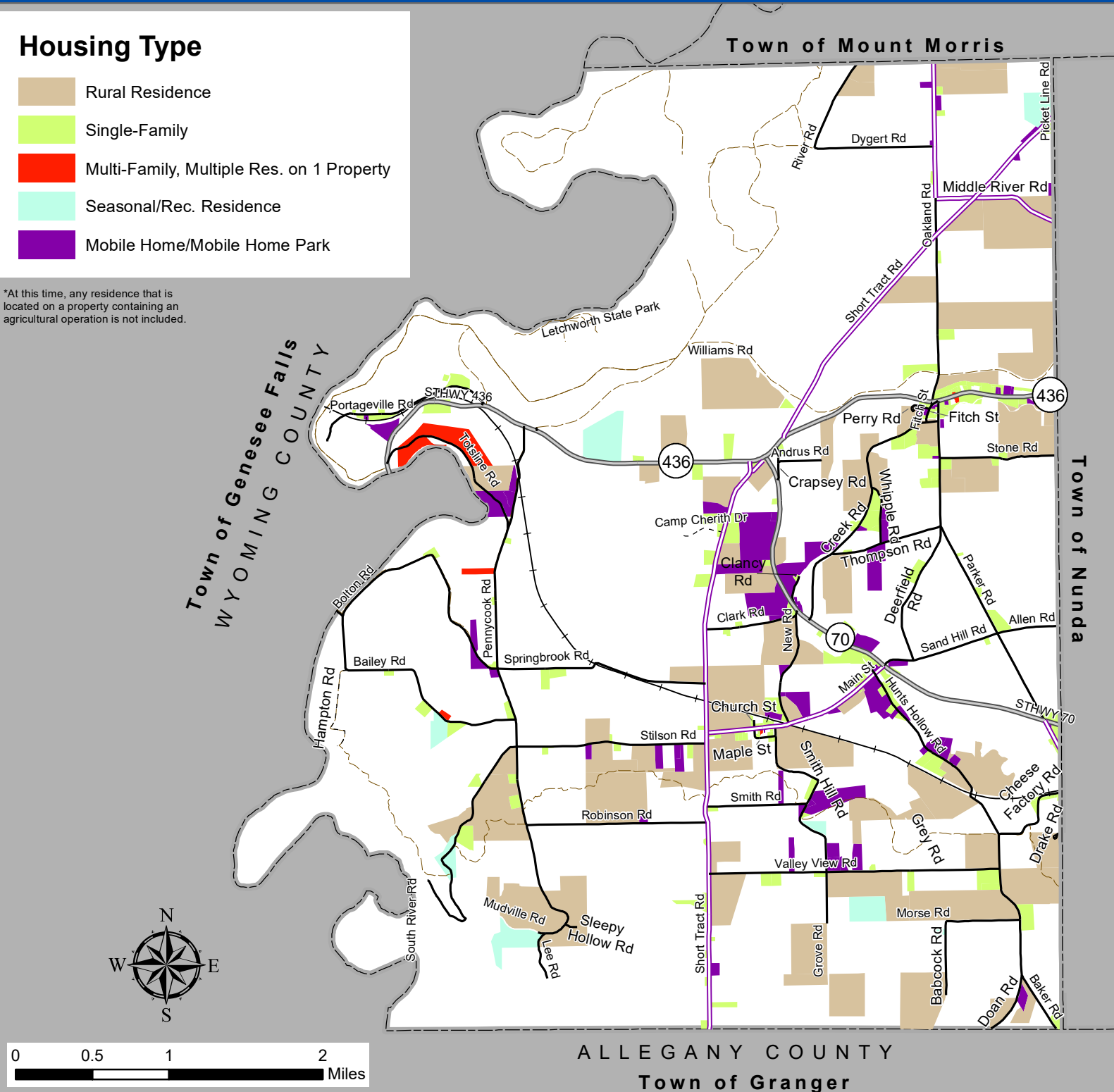
- Railroad
- Trails
- State Highway
- County Highway
- Town Road
- Village Road
- Private Road
- Town Boundaries

Source: Livingston County
tax parcel assessed land use, 2019
RTS Bus Routes, 01/2020
Map created by the
Livingston County Planning Department: 01/2020
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por_t_housing_
services_RTS2020.mxd

Housing Type

- Rural Residence
- Single-Family
- Multi-Family, Multiple Res. on 1 Property
- Seasonal/Rec. Residence
- Mobile Home/Mobile Home Park

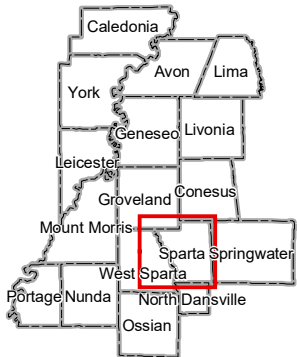
*At this time, any residence that is located on a property containing an agricultural operation is not included.



Town of Sparta

Housing and Services 2019

Livingston County



Housing Type

- Rural Residence
- Single-Family
- Multi-Family, Multiple Res. on 1 Property
- Seasonal/Rec. Residence
- Residential Multi-Purpose / Use
- Mobile Home/Mobile Home Park

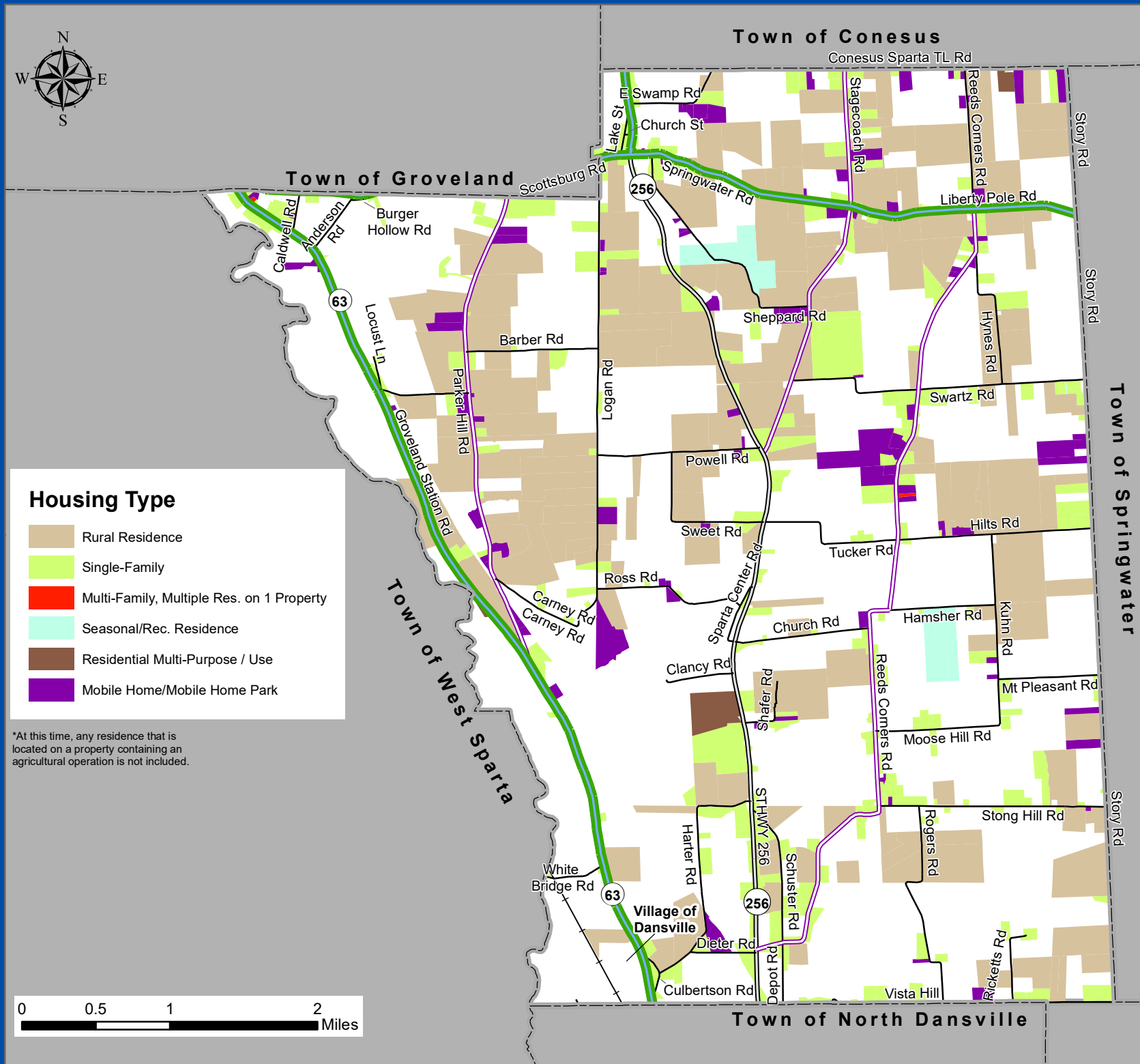
*At this time, any residence that is located on a property containing an agricultural operation is not included.

- RTS Bus Routes
- Railroad
- Trails
- State Highway
- County Highway
- Town Road
- Village Road
- Seasonal Road
- Private Road
- Town Boundaries



Source: Livingston County tax parcel assessed land use, 2019;
RTS Bus Routes, 01/2020
Map created by the
Livingston County Planning Department: 01/2020

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Town of Springwater Housing and Services 2019

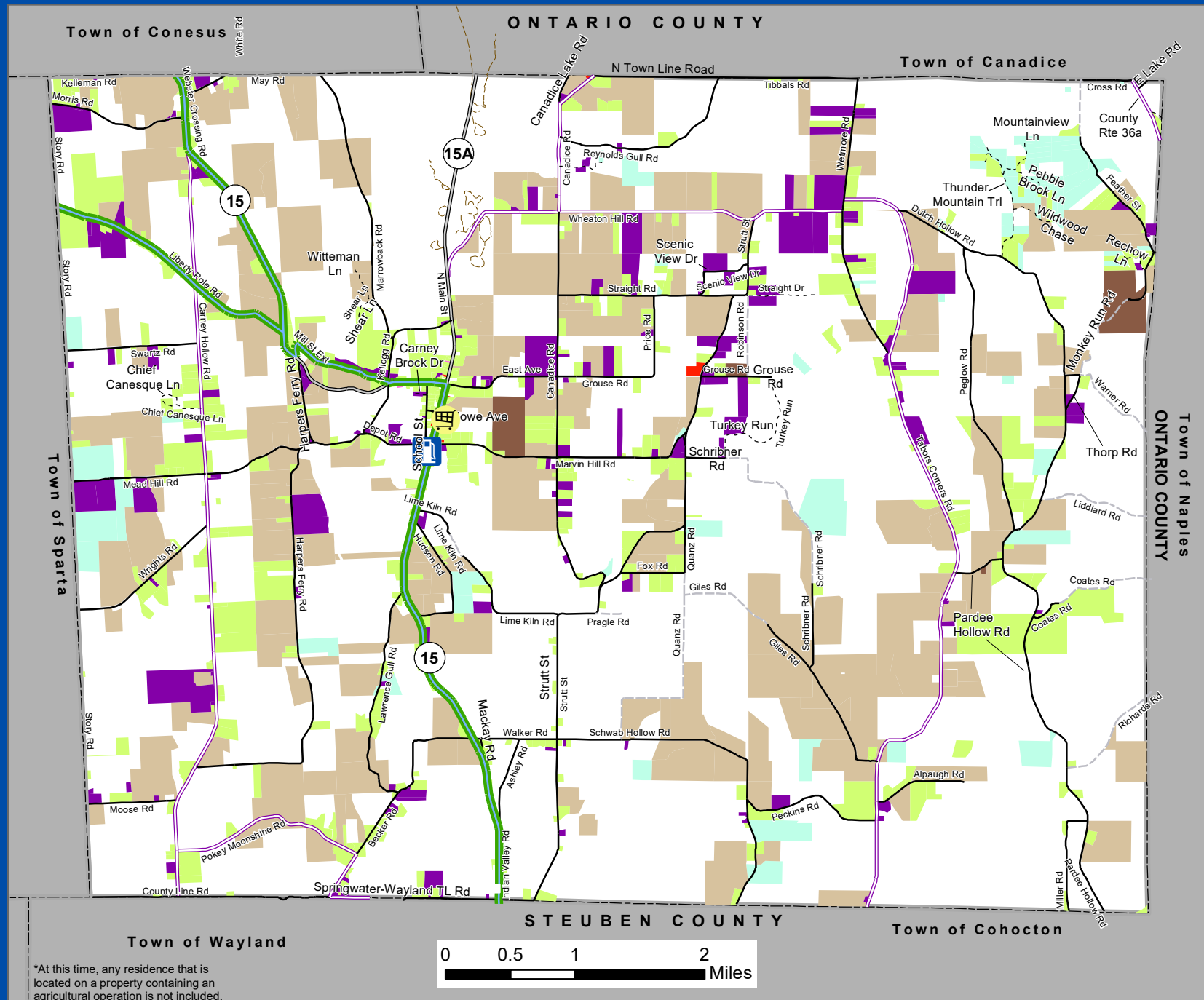
Livingston County



- Retail / Food Store
- Mini-Mart: Gas and Snacks
- RTS Bus Routes
- Trails
- State Highway
- County Highway
- Town Road
- Park Road
- Village Road
- Seasonal Road
- Private Road
- Town Boundaries

Source: Livingston County tax parcel
assessed land use, 2019
RTS Bus Routes, January 2020
Map Prepared by
Livingston County Planning Department, 01/2020

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spr t housing services RTS2020.mxd



Housing Type

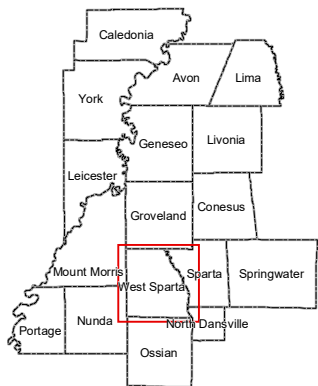
- Rural Residence
- Multi-Family, Multiple Res. on 1 Property
- Seasonal/Rec. Residence
- Mobile Home/Mobile Home Park
- Single-Family
- Apartments
- Residential Multi-Purpose / Use



Town of West Sparta

Housing and Services 2019

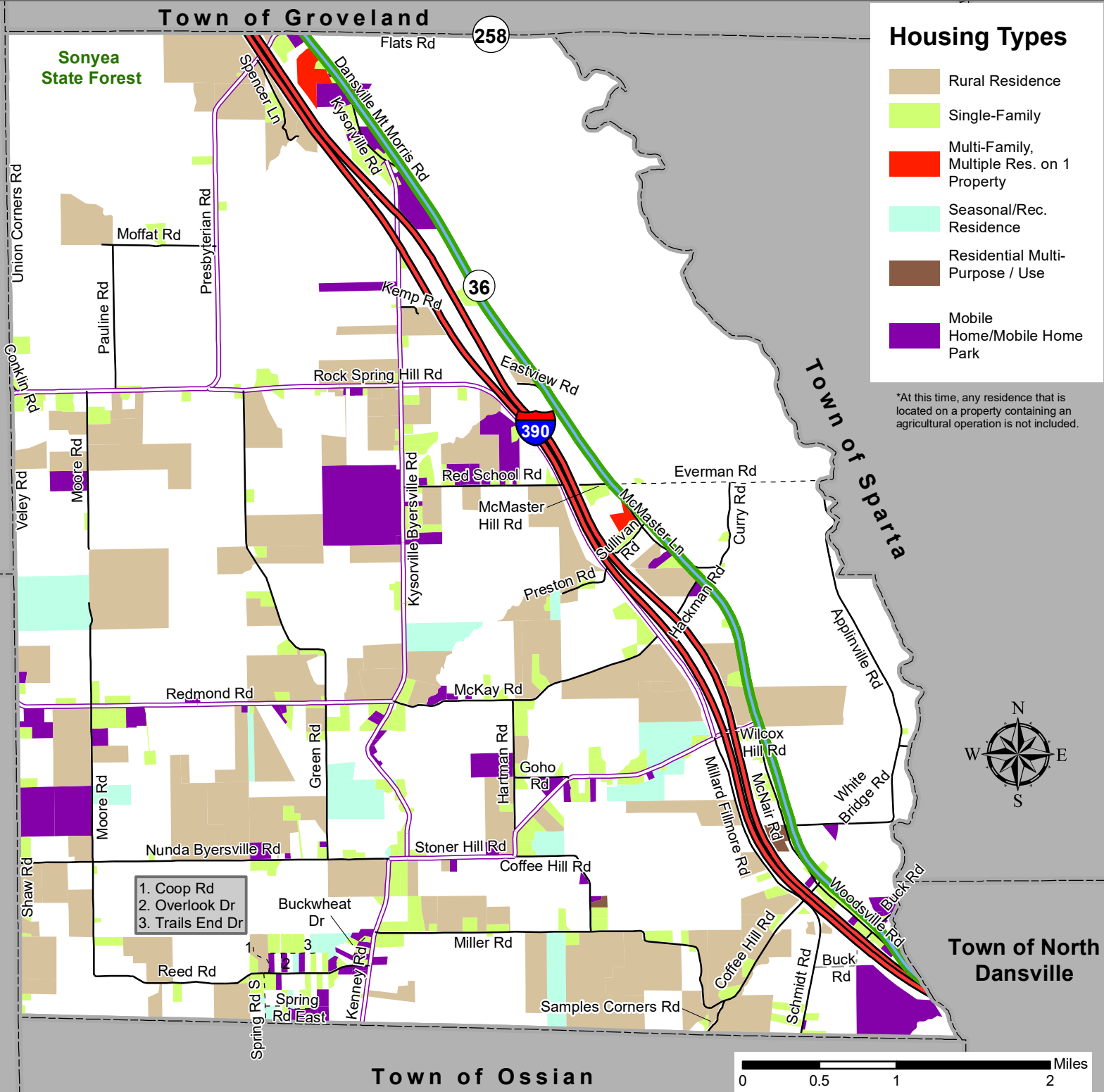
Livingston County



- RTS Bus Routes
- Expressway
- State Highway
- County Highway
- Town Road
- Village Road
- Seasonal Road
- Private Road
- Town Boundaries

Town of Mount Morris

Town of Nunda



Town of York

Housing and Services 2019

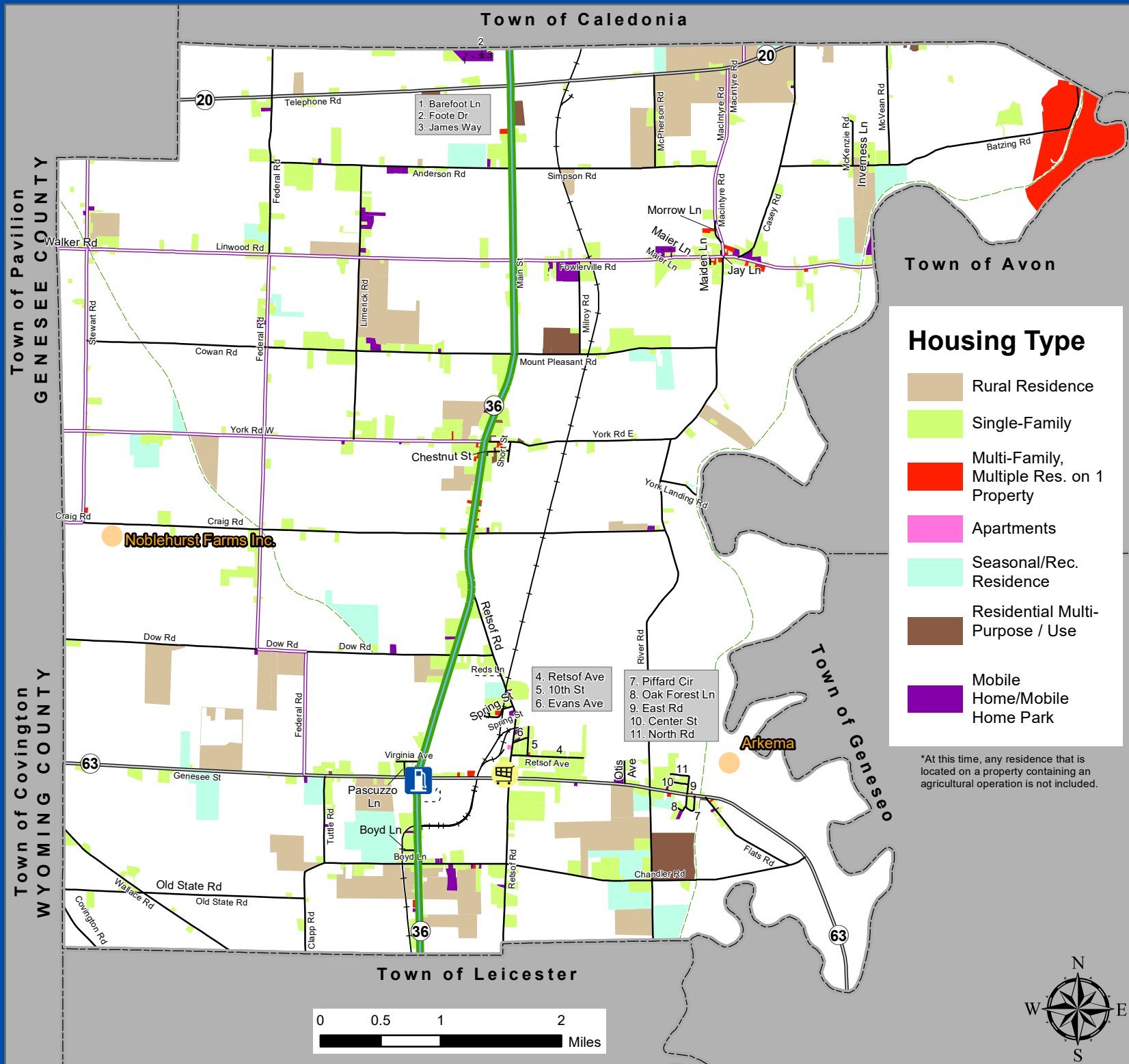
Livingston County



- Retail / Food Store
- Mini-Mart: Gas and Snacks
- Major Employers
- RTS Bus Routes
- Railroad
- Trails
- State Highway
- County Highway
- Town Road
- Park Road
- Village Road
- Seasonal Road
- Private Road
- Town Boundary

Source: Livingston County tax parcel
assessed land use, 2019
RTS Bus Routes, 01/2020
Map prepared by the
Livingston County Planning Department: 01/2020

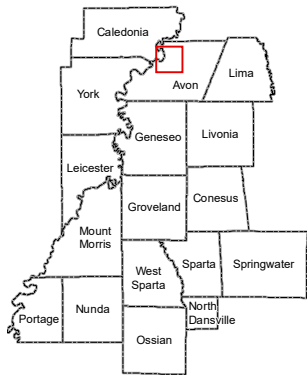
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Village of Avon

Housing and Services 2019

Livingston County



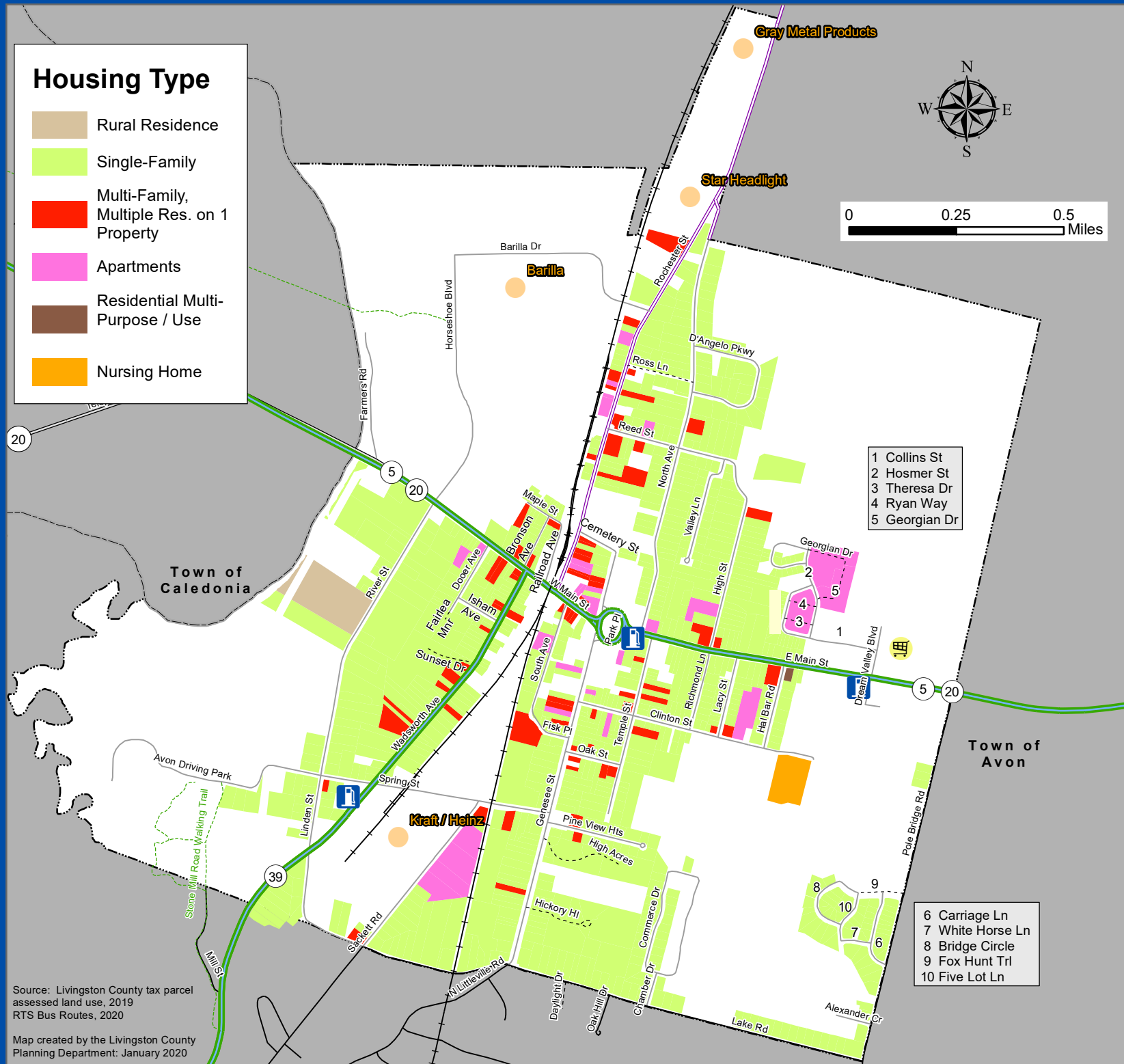
Housing Type

- Rural Residence
- Single-Family
- Multi-Family, Multiple Res. on 1 Property
- Apartments
- Residential Multi-Purpose / Use
- Nursing Home

- Retail / Food Store
- Mini-Mart: Gas and Snacks
- Major Employers
- RTS Bus Routes
- Railroad
- Trails
- State Highway
- County Highway
- Town Road
- Village Road
- Private Road
- Village Boundaries
- Town Boundaries

Source: Livingston County tax parcel
assessed land use, 2019
RTS Bus Routes, 2020

Map created by the Livingston County
Planning Department: January 2020



Village of Caledonia

Housing and Services 2019

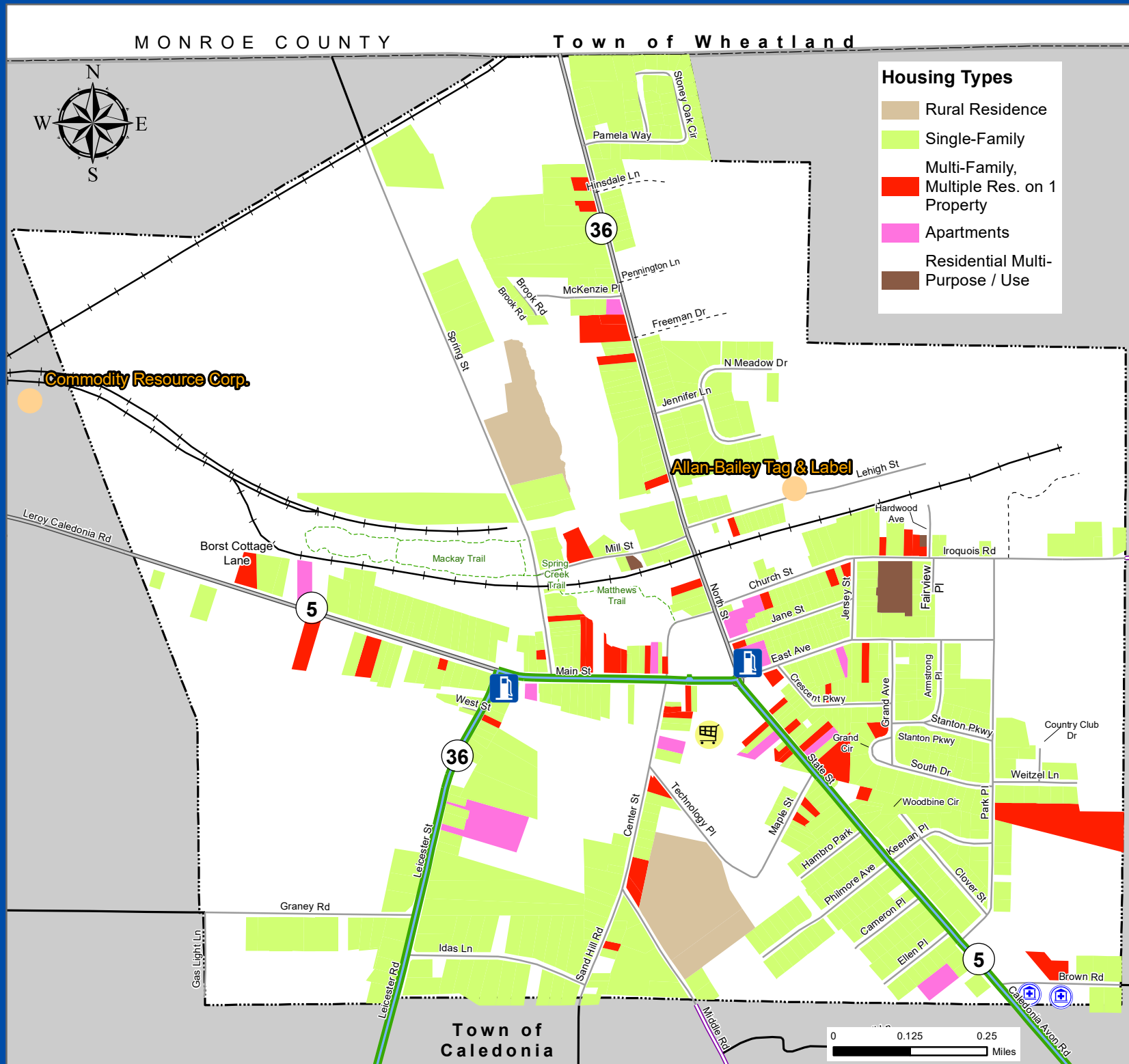
Livingston County



- Health Facility
- Retail / Food Store
- Mini-Mart: Gas and Snacks
- Major Employers
- RTS Bus Routes
- Railroad
- Trails
- State Highway
- County Highway
- Town Road
- Village Road
- Private Road
- Village Boundaries
- Town Boundaries

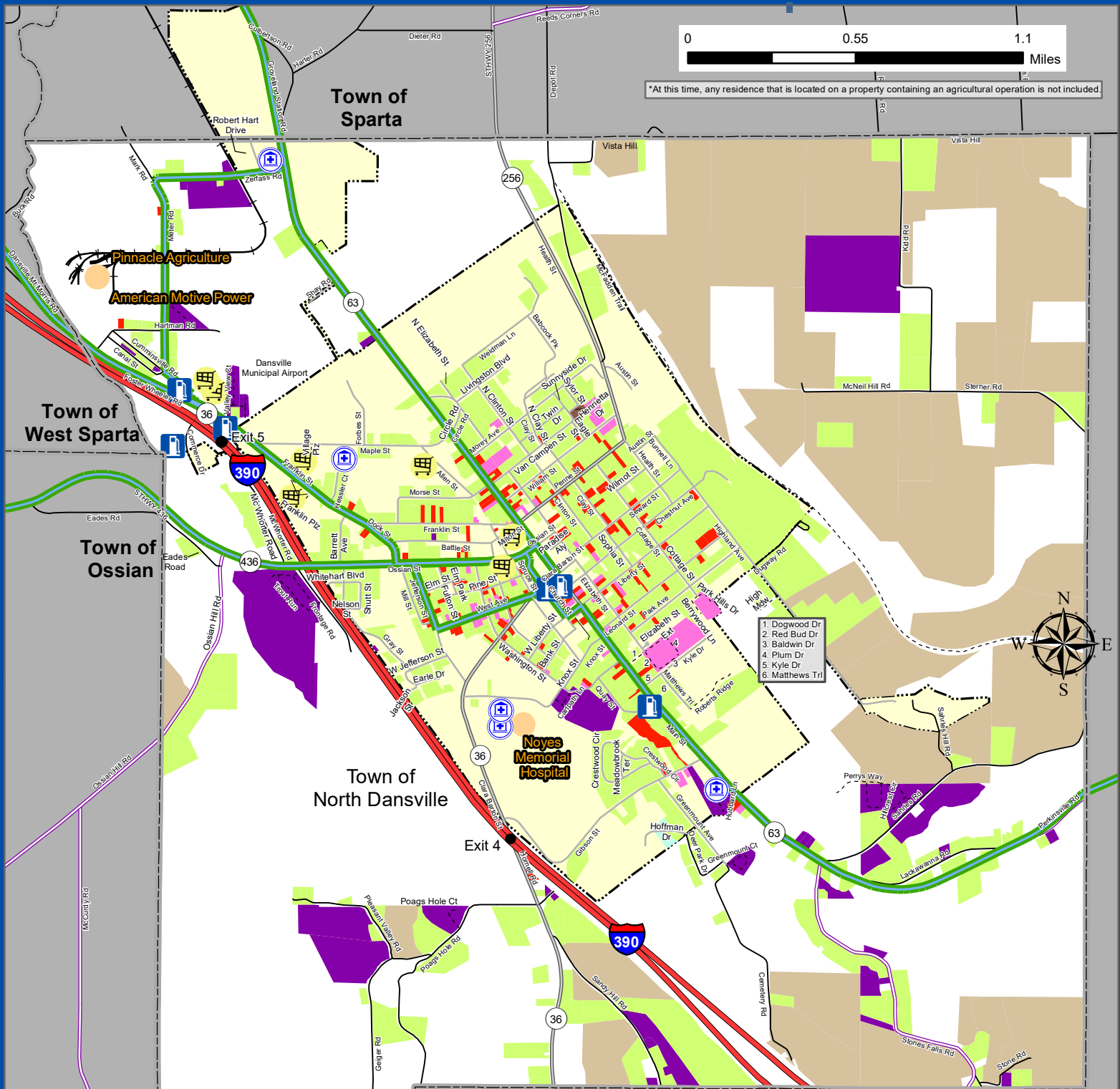
Source: Livingston County tax parcel
assessed land use, 2019
RTS Bus Routes, 2020
Map created by the Livingston County
Planning Department: January 2020

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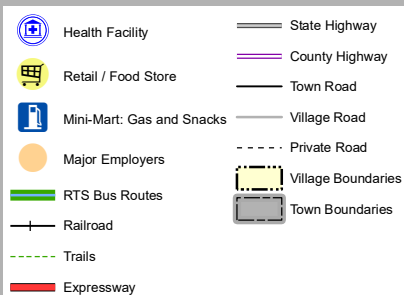
Town of N. Dansville & Village of Dansville

Housing, and Services: 2019

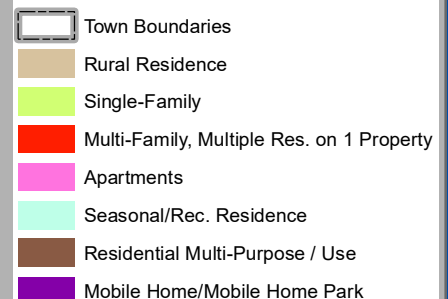


Source: Livingston County
tax parcel
assessed land use, 2019
RTS Bus Routes,
January 2020
Map created by the
Livingston County
Planning Department:
January 2020

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Force Maps\2020\dan_
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RTS2020.mxd



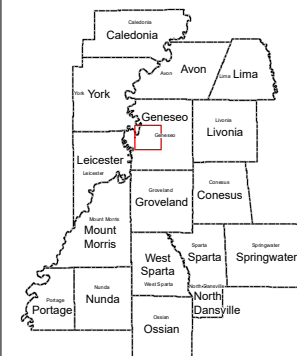
Housing Types



Village of Geneseo

Housing and Services 2019

Livingston County



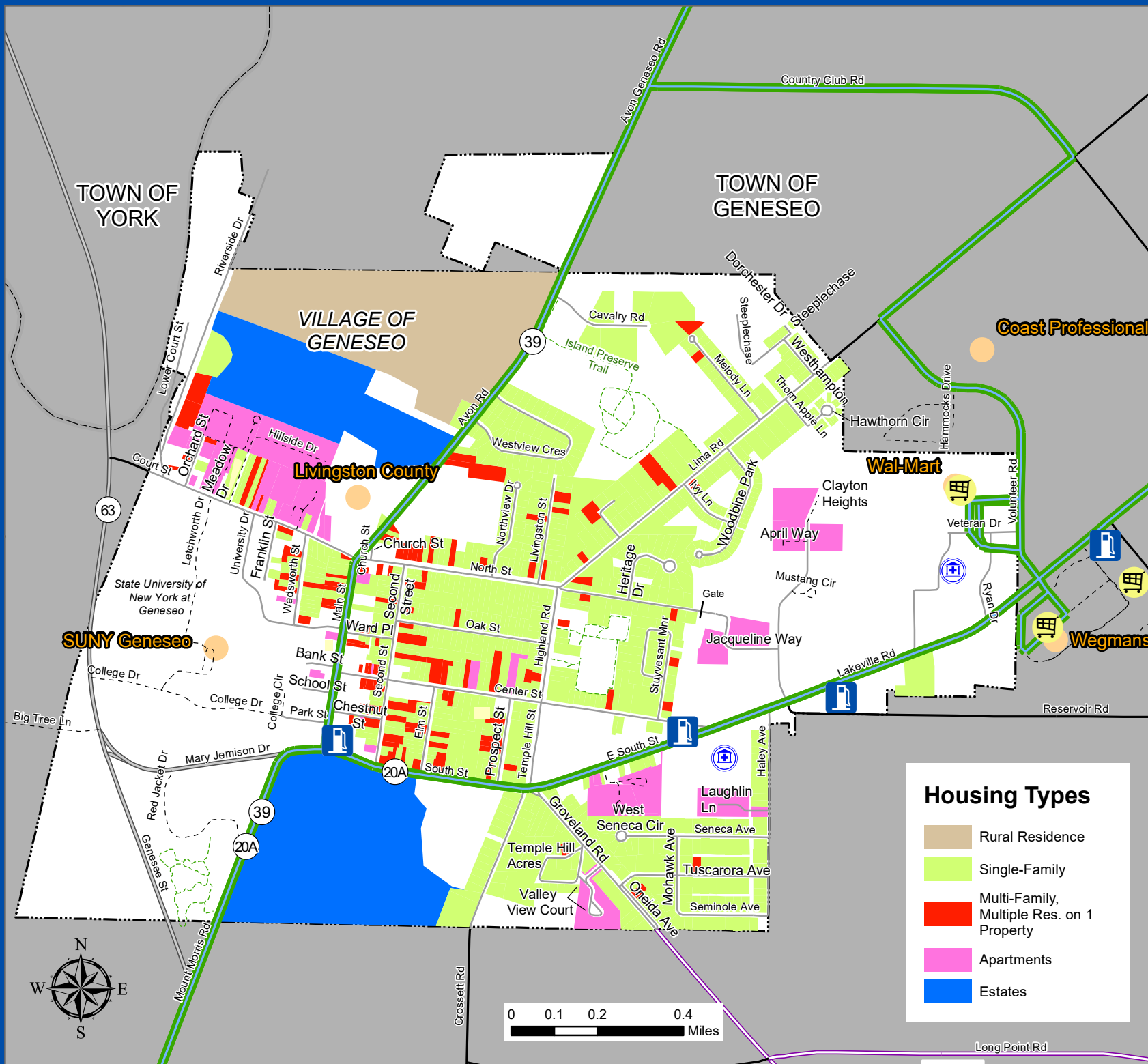
- Health Facility
- Retail / Food Store
- Mini-Mart: Gas and Snacks
- Major Employers
- RTS Bus Routes
- Trails
- State Highway
- County Highway
- Town Road
- Village Road
- Private Road
- Village Boundaries
- Town Boundaries

Housing Types

- Rural Residence
- Single-Family
- Multi-Family, Multiple Res. on 1 Property
- Apartments
- Estates

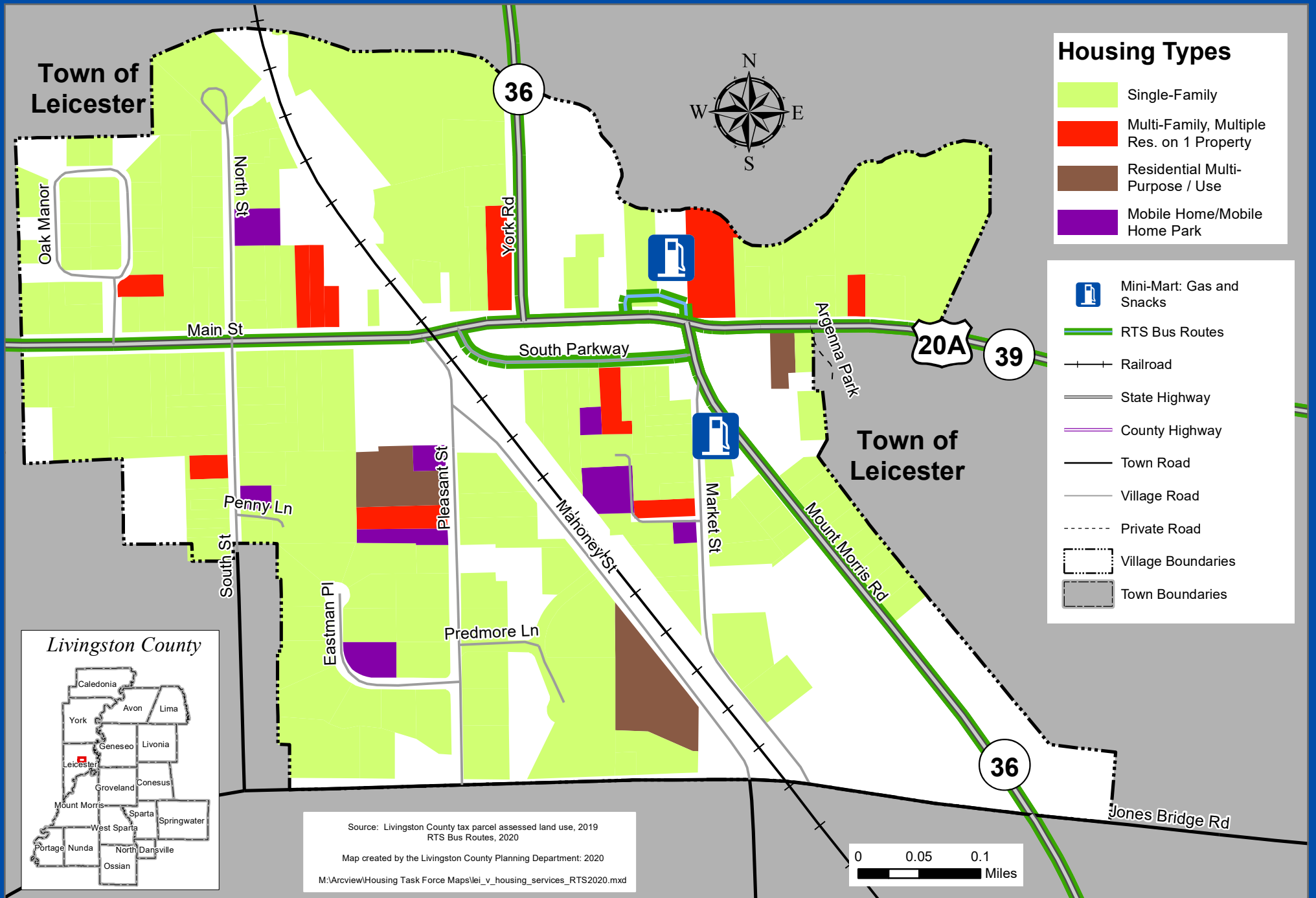
Source: Livingston County tax parcel assessed land use, 2019
RTS Bus Routes, January 2020
Map prepared by the Livingston County Planning Department: January 2020

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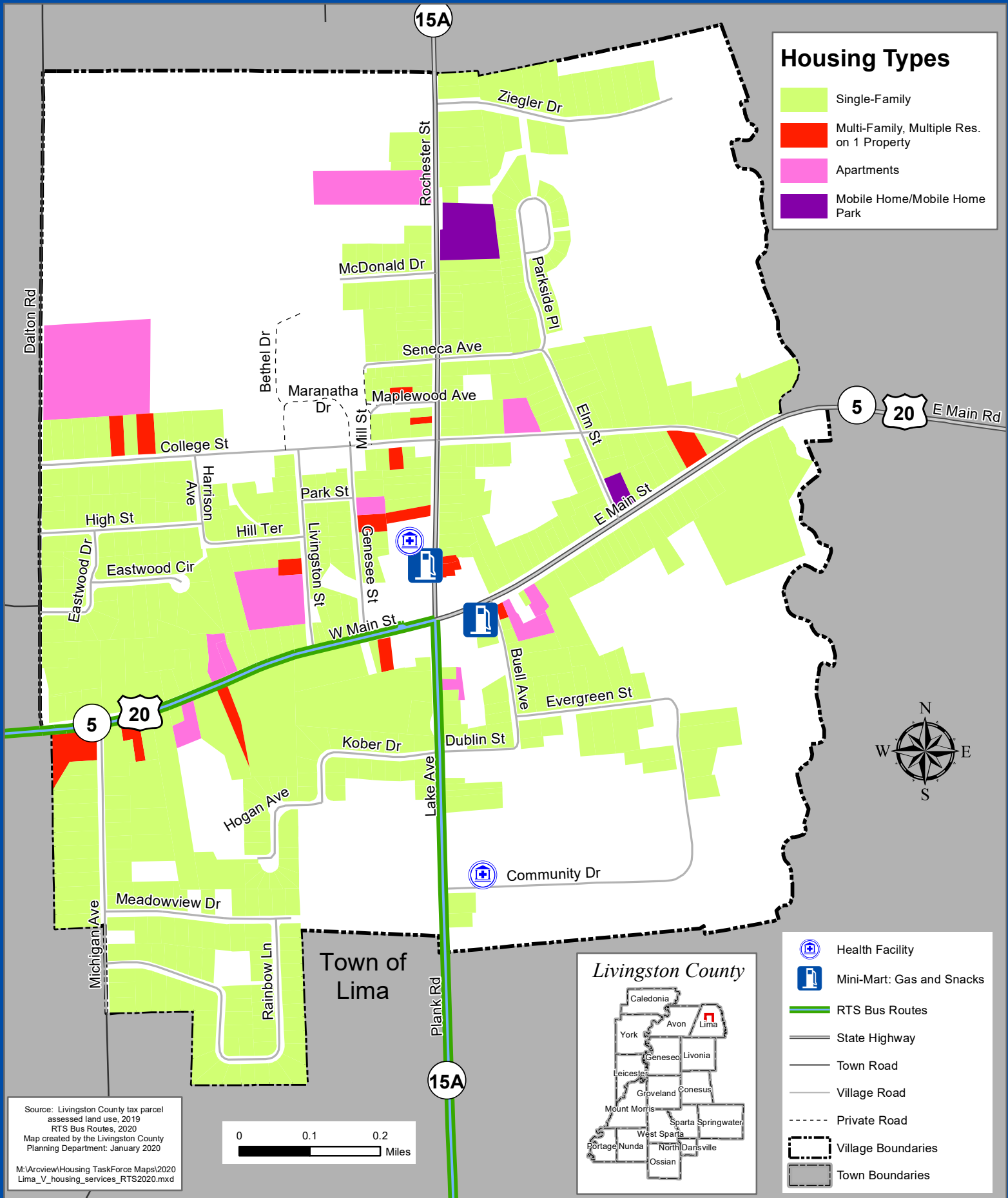
Village of Leicester

Housing and Services 2019



Village of Lima

Housing and Services 2019













Village of Livonia

Housing and Services: 2019

Livingston County








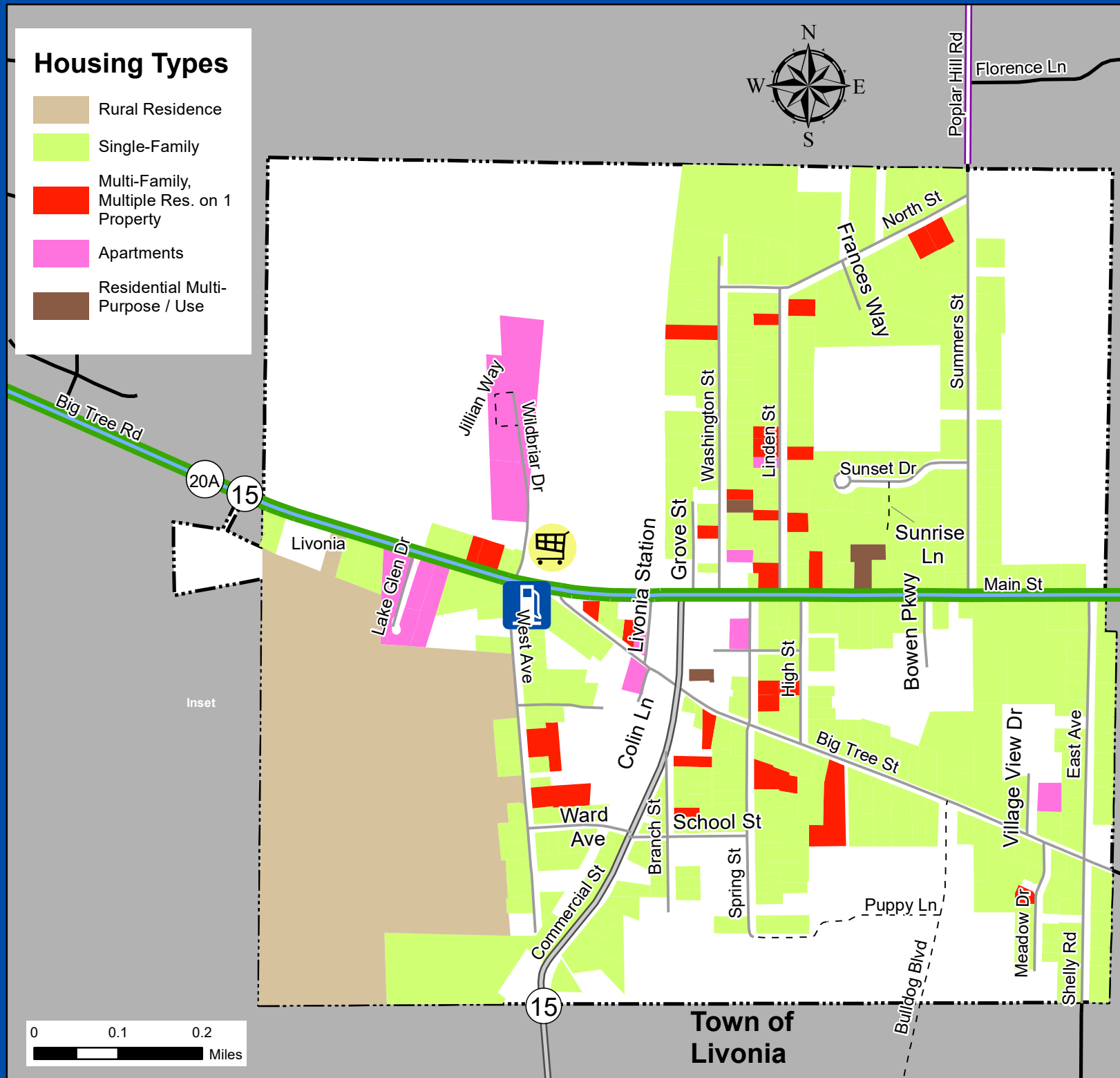
-  Retail / Food Store
-  Mini-Mart: Gas and Snacks
-  RTS Bus Routes
-  State Highway
-  County Highway
-  Town Road
-  Village Road
-  Private Road
-  Village Boundaries
-  Town Boundaries

Source: Livingston County tax parcel
assessed land use, September, 2019
LATS Bus Routes, January 2020
Map Prepared by Livingston County
Planning Department, January 2020

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Housing Task Force Maps
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Housing Types

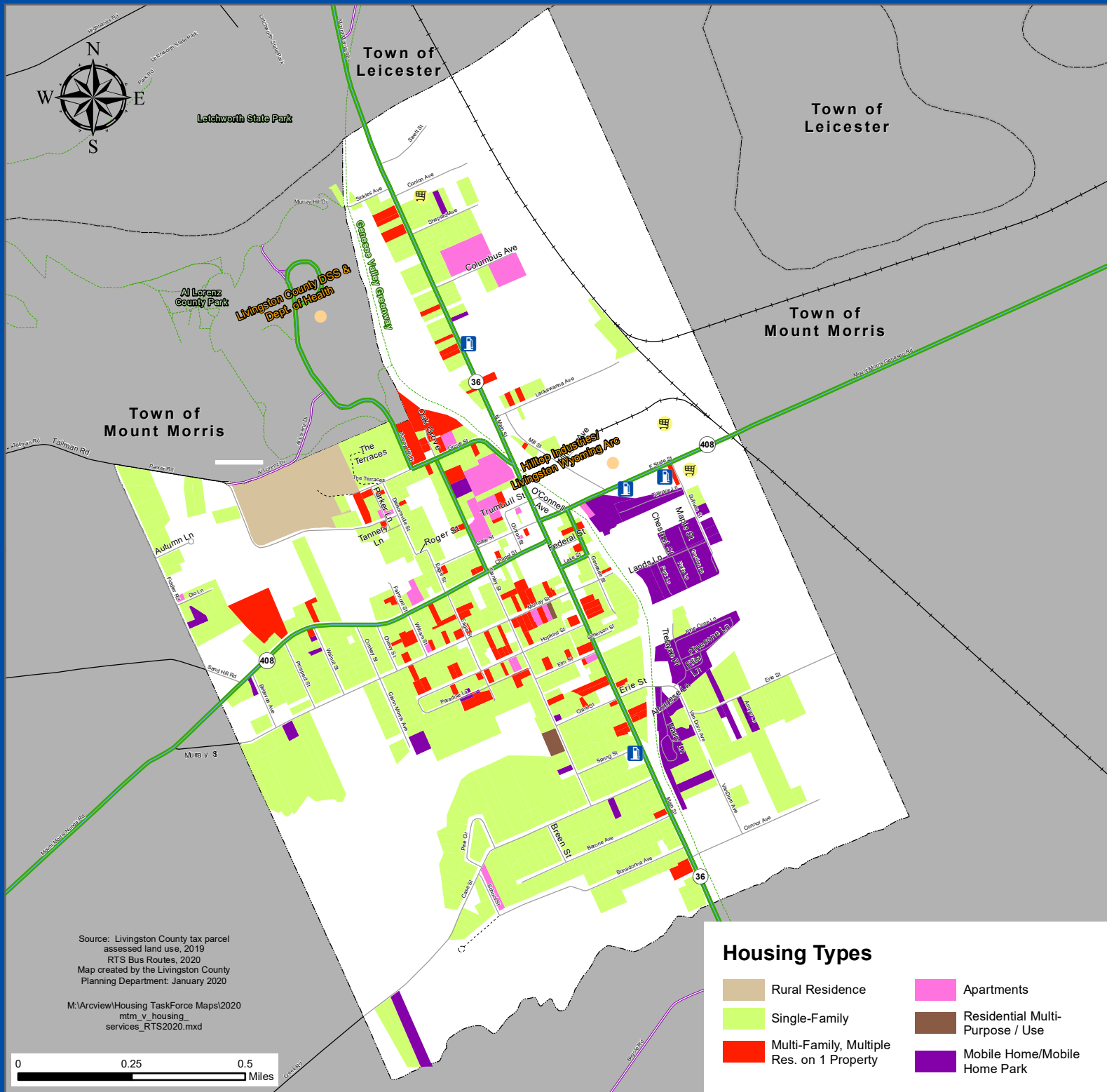
-  Rural Residence
-  Single-Family
-  Multi-Family,
Multiple Res. on 1
Property
-  Apartments
-  Residential Multi-
Purpose / Use



Village of Mount Morris

Housing, and Services

2019



Source: Livingston County tax parcel
assessed land use, 2019
RTS Bus Routes, 2020
Map created by the Livingston County
Planning Department: January 2020

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services_RTS2020.mxd

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Miles

Housing Types

- | | |
|---|---|
| Rural Residence | Apartments |
| Single-Family | Residential Multi-Purpose / Use |
| Multi-Family, Multiple Res. on 1 Property | Mobile Home/Mobile Home Park |

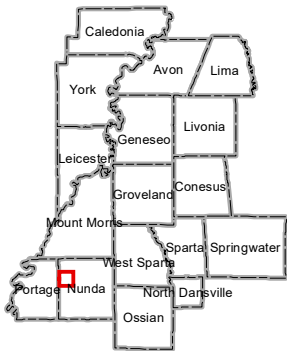
- Retail / Food Store
- Mini-Mart: Gas and Snacks
- Major Employers
- RTS Bus Routes
- Railroad
- Trails
- State Highway
- County Highway
- Town Road
- Village Road
- Private Road
- Village Boundaries
- Town Boundaries















Village of Nunda

Housing and Services 2019

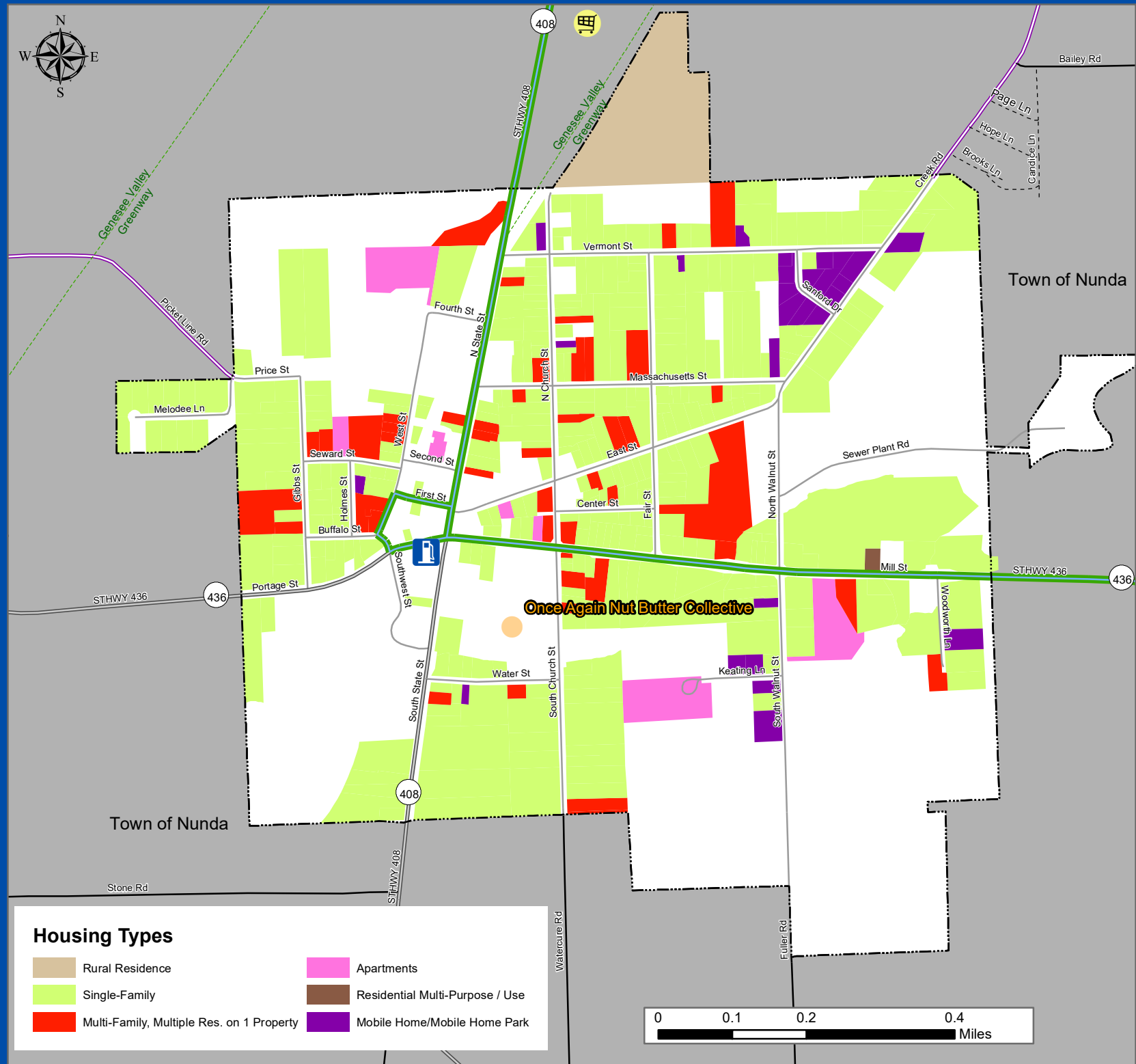
Livingston County



-  Retail / Food Store
-  Mini-Mart: Gas and Snacks
-  Major Employers
-  RTS Bus Routes
-  Trails
-  State Highway
-  County Highway
-  Town Road
-  Village Road
-  Private Road
-  Village Boundaries
-  Town Boundaries

Source: Livingston County tax parcel assessed land use, 2019
RTS Bus Routes, January 2020
Map created by the Livingston County Planning Department, January 2020

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Appendix 5: Public Meeting Notes

MEETING MINUTES

LIVINGSTON COUNTY HOUSING NEEDS ASSESSMENT AND MARKET ANALYSIS

HOUSING FOCUS GROUPS

Date: December 17th, 2019

Time: 10:00 – 12:00 p.m. and 2:30 - 4:30 p.m.

Location: Chamber of Commerce, Geneseo and Emergency Operations Center, Mt. Morris, NY

Focus Group 1: Realtors and Lenders

- M. Crowe welcomed attendees and provided an overview over the purpose, goals, and objectives of the project and meeting. Attendees were then asked to provide a description of their background and to discuss current trends, needs, and opportunities in the housing market. A summary of the discussion follows below:

1.1 Trends

- Cost to build is high – limited construction lending for single family homes; seeing older buildings being converted to new uses
- Geneseo is accessible; provides a range of housing for what people are attracted to
- Aging population relocating into other types of housing, freeing single-family homes
- All ages are seeking lending for new home purchase; example is the Hammocks – new townhouse development that averages \$1,180 – \$1,580 plus utilities
- Student housing lending – fills quickly in Geneseo; many are purchasing older homes and flipping for student housing
- Housing availability – can “draw a line” across mid-line County north for housing availability and cost
- Many younger families and professionals returning to the area for family, small town community atmosphere, expense of living elsewhere (e.g. Washington, D.C., NYC, etc.)
- Working professionals often bringing on roommates and staying home with parents to help with expenses of home ownership

1.2 Needs and Opportunities

- Northern end of the County is prime for developers due to proximity to the Rochester metro area
- Need a stronger partnership between professional lenders, realtors, attorneys to help buyers with qualifications; understanding of the market
- Cost of apartments is high; need housing and education for those in transition from renter to homeowner
- We don't have many "patio" type homes for seniors; high demand to age in place
- Housing proximity; safety, walkability

Focus Group 2: Community Champions

- M. Crowe welcomed attendees and provided an overview over the purpose, goals, and objectives of the project and meeting. M. Crowe explained that this focus group was a part of the "Community Champions" – individuals who represent the County, as well as their respective municipalities, through Planning Board, Zoning Board, Agricultural Board, or other appointed position. Participants were then asked to speak briefly about their housing experiences from the perspective of a municipal representative. The discussion included trends, needs, and opportunities.

2.1 Trends

- *Mt. Morris* – A significant number of older homes; seniors are interested in aging in place; general maintenance needs including windows, heating, etc. as the structures continue to age; need affordable housing and cost of land makes it unaffordable for most to build; public water access is questionable; speculation that the codes will be revised from 3 dwelling units/acre to 1 du/ac
- *Caledonia* – Seniors are leaving as there are few options to downsize to; homes are being divided/split; vacant land is difficult to come by as farmers are unable or unwilling to subdivide; need places for livestock (cows and horses); would be nice to see patio homes; developers need water and sewer which the future of water/sewer extension is questionable (not available in the Town; village only); no short-term rental options
- *Geneseo* – Sewer was at capacity 15 years ago, question as to the capacity now; 20A/Volunteer Road – utility impacts to be reviewed; low income housing needed while professors buy high income, there is no middle income housing; farms – conservancy (no development) with

the challenge for small family-owned farms; pilot projects and County tax relief – cuts down the number of new people looking for housing; question of a strain on emergency resources with new projects and a formula to determine capacity (i.e. Skybird Landing)

- *Avon* – Comprehensive Plan identifies low income housing proposed near schools – how does the community plan for schools moving forward?; Planned Residential Development District (PRDD) has successfully resulted in mixed types of housing; patio homes at Tops and Morgan Road would work well given the demographic; the key to success in this area is in private investment; grants/support are attractive to developers and development opportunity; at the local level – redo the codes to reduce conflict between land use
- *Nunda* – moratorium on conversions from single- to multi-family homes to control absentee landlords; amending the Comprehensive Plan and zoning ordinance as a tool to guide desired development; short-term rentals; campground conversions (hotel / motel / B&B); impacts trending in the industry including RVs/campers utilizing water, parking in driveways and hooked up to utilities due to proximity to Letchworth, outdoor recreation opportunities, and tourism particularly during the on-season
- *General Trends / Observations* –
 - High cost of land; farmers looking for protection;
 - Lack of engagement / integrated development into the community;
 - Large homes being converted to accommodate lower-income populations;
 - Need to help families get started in small, managed homes
 - Marketing needs in the southern part of the County – outdoors / recreation tourism opportunities
 - Challenge of “boxing in” of the villages due to agricultural protection and County tax benefits; land is no longer developable and limits outward growth
 - Challenge of transient population – example of motels and the role they play during high vacancy periods (parolees and DHS)
 - AirBNB; would allow people to spend time in an area that has limited hotels/motels; seasonal need – at what cost? How does the community maintain cohesiveness while accommodating short-term rental needs?

- Affordable housing – need for “rainy day funds” that help low-to middle-income homeowners with small infrastructure, exterior maintenance projects; extend municipal water where appropriate to improve health and reliability of service (service water vs. wells)
- Involve lenders / realtors in long-range planning and be a presence at the table; market opportunities for families, education, and how to integrate new owners into the community

2.2 Opportunities

- Experiences – opportunities to connect with the younger generation (boards and community integration)
- Interconnected businesses and building community; goes back to private investment and public-private partnerships
- School system – good opportunities; people moving from Monroe County for the schools
- Good jobs; need for residential development – Lima, Caledonia, Avon
- Senior housing for those that want to retire and middle income (younger population who can afford to stay) – all contingent on water/sewer availability
- Availability of land to development
- Future studies and data needs – education system, historic grants, transportation needs at the County level

LIVINGSTON COUNTY
HOUSING NEEDS ASSESSMENT AND MARKET ANALYSIS
FOCUS GROUP

Date: 12/17/2019

Time: 2:30 p.m.

Location: Emergency Operations Center

[illegible]