



Town of Shelter Island

COMMUNITY HOUSING PLAN

September 2022

DRAFT





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1.0	INTRODUCTION	1
1.1	Overview	1
1.2	Community Housing Plan Principles and Goals	4
2.0	METHODOLOGIES	6
2.1	Community Housing Fund Advisory Board (CHFAB)	6
2.2	Community Engagement	6
	<i>Public Open Houses</i>	6
	<i>Online Housing Questionnaire</i>	7
2.3	Technical Investigation	7
3.0	INVENTORY OF EXISTING CONDITIONS	8
3.1	Existing Housing and Demographic Setting	8
3.2	Existing Laws, Regulations and Plans	8
3.3	Results of Public Outreach	12
4.0	ANALYSIS	13
4.1	Housing Needs Assessment	13
4.2	Community Preferences	14
	<i>Summary of Input</i>	14
4.3	Available Options for Community Housing	14
	<i>Housing Types</i>	14
4.4	Constraints on the Provision of Community Housing	16
	<i>Zoning</i>	16
	<i>Suffolk County Sanitary Code</i>	16
	<i>Public Water</i>	17
5.0	OBJECTIVES AND RECOMMENDATIONS	18
5.1	Objectives	18
5.2	Recommendations	20
	<i>5.2.1 Recommended Priority Fund Uses</i>	20
	<i>5.2.2 Focus on Planning and Implementation of Rental Housing</i>	20
	<i>5.2.3 Management Options</i>	23
	<i>5.2.4 Establish a Process for Community Housing Project Evaluation and Approval</i>	25

5.2.5 *Outreach and Public Education*.....26
5.2.6 *Update the Housing Plan*26
5.2.7 *Implement Design Standards for Community Housing*26
6.0 NEXT STEPS.....28

APPENDICES

- A. Housing Needs Assessment
- B. Summary of Results from the Public Questionnaire

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1.0 Introduction

This document is the Community Housing Plan for the Town of Shelter Island, New York. Below is discussion of the purpose and need for this Plan (**Section 1.1**), as well as the goals that have been formulated to guide its development (**Section 1.2**).

1.1 Overview

Shelter Island has a unique geographic setting, situated between the North and South Forks of the Long Island mainland and accessible only by ferry. As a result, Shelter Island is, by far, the most rural of the ten townships in Suffolk County, which is an essential aspect of the Town's character, dearly cherished by the community and of foremost importance to its inherent "sense of place."

The whole Island encompasses an area of 27.1 square miles with the developed portion predominantly consisting of single-family residences. There are small commercial areas in Shelter Island Heights and in the center of town. Also in the center of town are community services as well as small, scattered areas of agricultural and park land. Approximately one-third of the Island is made up of the Mashomack Preserve, owned and operated by The Nature Conservancy.

Shelter Island is blessed with a rich cultural heritage as well as environmental resources. This heritage includes the Manhasset Tribe, the original inhabitants, and European settlers who can date their arrival as far back as the mid-1600s. Environmental resources include a complex network of coastal embayments that are part of the Peconic Bay System, one of only 28 recognized "Estuaries of National Significance" identified by the U.S. Environmental Protection Agency's National Estuary Program. The Town also benefits from its proximity to New York City, which contributes to the overall economy of Long Island's East End, notably in the second homeowner, tourist, and vacation industries. The combination of these attributes makes Shelter Island a very desirable location for residency.

While all of the foregoing are clearly positive aspects of the Town's setting, these conditions also have contributed to an escalation in local residential real estate prices, limiting the availability of housing for low- and moderate-income individuals and families. Seasonal, vacation homes comprise the majority of the housing stock, with many of these residences occupying the luxury end of the housing market. The human foundation of the community consisting of public employees, the workforce of local businesses, people in various crafts and trades, and many more are finding it increasingly difficult, or even impossible, to find housing that is priced within their means.

Recent circumstances have significantly widened the residential affordability gap in the region and on Shelter Island. A steady upward trend in home values has been occurring over many years, outpacing the average increase in personal income during that period. Further exacerbating this gap, since early 2020 has been the Covid-19 pandemic, which has prompted the flight of upper-income residents from urban areas such as New York City to nearby areas with a more rural setting like the East End of Long Island.

The lack of sufficient community housing supply is a widespread issue, affecting the broader region beyond Shelter Island. However, the disruptive effects are strongly felt locally in each municipality. The impacted segment of the population includes a diverse range of integral members of the community, causing adverse societal consequences. This includes the younger generation of people who grew up on the island and are compelled to move away due largely to the unavailability of suitable housing options.

At the other end of the age continuum, seniors who need to downsize their homes are not afforded the opportunity to remain in the community where they have made their lives. Additionally, because of the growing disparity between wages and the high relative cost of housing, businesses are experiencing ever-growing difficulty hiring and keeping employees, resulting in disruption to the local economy. Similarly, volunteer and emergency service organizations (e.g., fire department, ambulance, medical, etc.) are encountering shortfalls in personnel recruitment and retention, again driven largely by the unaffordability of local housing for their member pool. Thus, the formulation and implementation of effective measures to address the issue of affordable housing are critical to the future of Shelter Island.

The subject of affordable housing (or community housing) is not a new one for Shelter Island. Shelter Island's 1994 Comprehensive Plan reported that only 6 percent of year-round households could afford to purchase a house of \$200,000, which at that time was less than the median value of an owner-occupied home on Shelter Island. The 1994 Comprehensive Plan proposed goals to create and maintain affordable housing opportunities for a diversity of age and income groups, noting that young working households, first time homebuyers and seniors could benefit. It also recommended the creation of an organization on the Island to facilitate affordable housing.

The 2009 Comprehensive Plan Advisory Committee Report indicated that there had been little progress on the issue of affordable housing since completion of the 1994 Comprehensive Plan and acknowledged continuing challenges on this issue and noted limited progress in achieving the goals of the 1994 Plan for affordable housing.

In 2008 the Town Board enacted Chapter 51 of Town Code ("Community Housing") to facilitate a supply of affordable housing on Shelter Island over time adequate to serve the varied needs of the Island's population and to ensure that any new housing be developed in harmony with the Island's environment. Chapter 51 also established the Community Housing Board to oversee the Town's affordable housing program. In addition, the Town amended the Zoning Code to allow for year-round rentals of units accessory to single-family homes and to allow (or legalize existing) second units subject to stringent restrictions.

The need for community housing is well established, particularly for rental housing as demonstrated in **Section 4.1** and **Appendix A**. Based on these considerations, this Community Housing Plan is primarily focused on addressing the established need for year-round rental housing.

This Community Housing Plan has been prepared as an independent component of the overall Comprehensive Plan Update for the Town of Shelter Island, which is in preparation. This ongoing effort will update the 1994 Comprehensive Plan which, as noted above, highlighted the housing challenges that Shelter Island was facing at that time. In the subsequent years, this situation has become more pressing, as the gap between income and housing costs has further widened, increasing the importance of effective action to provide a broader range of housing options to address local needs that extend beyond the single-family homes that predominate on the Island.

This Community Housing Plan has been developed in consideration of the work completed to date on the Town's Comprehensive Plan Update. This Plan also encompasses the considerable work that has been ongoing since the establishment of the Community Housing Board (CHB) in 2008; and, most recently, the outreach, research and collaboration of the Community Housing Fund Advisory Board (CHFAB) which was established by the Town Board in January 2022 as a separate body for this specific purpose.

Technical assistance in the preparation of this Plan has been provided by Nelson, Pope & Voorhis, LLC (NPV). However, the direction of the Plan and its recommendations are the product of the dedicated efforts of the CHFAB, as guided by community input received during two public open house meetings, Town Board work sessions, and other forms of outreach (particularly a public housing questionnaire made available at the public open house meetings and on-line). This is a community-based plan which reflects the goals and desires of the residents, service providers, business owners and operators, and other local stakeholders on Shelter Island.

This document assesses local housing needs based on available census data and trends in population and the Town's community housing goals. In addition, consideration was given to community housing types appropriate for Shelter Island, the requirements for a community housing program, and standards for community housing that are consistent with the Town's desire for sustainability and context-sensitive design. It is important to recognize that properly addressing housing needs is a very localized issue which must be tailored to the specific circumstances of the given community. In the case of Shelter Island, this means that any initiative to address local housing needs must be unobtrusive, accomplished in a manner that does not disrupt the essential fabric of the existing setting, and is protective of the sensitive environment. Preservation of the bucolic character and sensitive environmental resources of the Island is of equal importance to enhancing the housing stock to better serve the community.

While the fundamental impetus for this Community Housing Plan comes from the ongoing work on the Town's Comprehensive Plan Update and an associated, widespread recognition that there is a critical need for more varied housing options to better serve the Shelter Island community, it is noted that this initiative is being undertaken in conjunction with the Peconic Bay Region Community Housing Act (CHA) which was signed into law by the Governor in October 2021. The CHA establishes a funding mechanism to provide revenues from levies on local real estate transfers (i.e., 0.5 percent of the sale price, subject to certain thresholds and exemptions, expanding upon the existing 2.0 percent levy under the Community Preservation Fund), along with a program to administer these funds. Both the preparation of a Community Housing Plan (i.e., this document) and approval of a mandatory referendum are required for Shelter Island to participate in the CHA program (and to partake of the funding attached thereto); this referendum is scheduled for November 8, 2022. However, the urgency of creating enhanced housing opportunities on Shelter Island would persist in the absence of the CHA passage, and therefore Plan has been structured as a roadmap for implementation of community housing goals separate from potential financing that would be available if the CHA is enacted.

Below is an outline of the remaining sections of this document, which comprise the elements of the Town of Shelter Island Community Housing Plan:

Section 1.1 – Community Housing Plan Principles and Goals

Section 2.0 – Methodologies used in the investigation

Section 3.0 – Inventory of Existing Conditions, including housing/demographic setting of the Town, and relevant laws, regulations and plans

Section 4.0 – Analysis, including a summary of the housing needs analysis, community preferences, available options for community housing, and constraints to the advancement of the community housing goals

Section 5.0 – Objectives and Recommendations, identifying recommendations actions to advance the community housing goals

Section 6.0 – Next Steps, identifying implementation actions.

1.2 Community Housing Plan Principles and Goals

Chapter 52 of the Town Code (Community Housing Fund), enacted by the Town Board in April 2022, establishes a series of principles to which the Community Housing Plan should adhere to the degree practicable. These principles are founded in the tenets of smart growth, which covers a range of development strategies that are directed at enhancing the cohesiveness and economic vitality of communities, while also minimizing adverse environmental impacts that are associated with suburban sprawl. The special environmental sensitivity of Shelter Island establishes a particularly strong basis for smart growth planning, as has been consistently expressed in public input received during this planning process and has been given a high priority by the CHFAB. As identified in the Peconic Bay Region Community Housing Act, the eight smart-growth principles that are to guide the Community Housing Plan are as follows:

1. **Public Investment.** To account for and minimize social, economic, and environmental costs of new development, including infrastructure costs such as transportation, water, schools, recreation, and loss of open space and agricultural land;
2. **Development.** To encourage development in areas where transportation, water, and sewage infrastructure are available or practical;
3. **Conservation.** To protect, preserve, and enhance the Town's resources, including agricultural land, forests, surface waters, groundwater, recreation and open space, scenic areas, and significant historic and archeological sites;
4. **Coordination.** To promote coordination of state and local government decisions and cooperation among communities to work toward the most efficient, planned and cost-effective delivery of government services by, among other means, facilitating cooperative agreements among adjacent communities, and to coordinate planning to ensure compatibility of one's community development with development of neighboring communities;
5. **Community design.** To strengthen communities through development and redevelopment strategies that include integration of all income and age groups, mixed land uses, and compact development, traditional neighborhood development, planned unit development, open space districts, downtown revitalization, brownfield redevelopment, enhanced beauty in public spaces, and diverse and community housing in close proximity to places of employment, recreation, and commercial development;
6. **Transportation.** To provide transportation choices, including increasing public transit and alternative modes of transportation, in order to reduce automobile dependency, traffic congestion, and automobile pollution;
7. **Consistency.** To ensure predictability in building and land use codes; and,
8. **Community Collaboration.** To utilize, through a collaborative community-based effort, smart growth plans that include long term land use and permit predictability and coordination, efficient decision making and planning implementation.

The following are the community housing goals for the Town of Shelter Island, as identified by the CHFAB. These goals provide overarching guidance to the Town's community housing planning initiative and are reflected in the recommendations that emerged from the process.

1. Provide affordable housing opportunities for islanders at economic levels not currently available in the housing market.
2. Create quality housing that aligns with the architectural context and heritage of the island.
3. Build and design housing following best practices and principles of sustainable building design and site development, minimizing impact upon the natural resources of the island.
4. Develop and manage housing projects in a manner that fully respects our residents.
5. Provide a variety of housing types and options that remain affordable in perpetuity.
6. Mitigate population loss and grow the percentage of year-round resident workers in all fields, including teachers, first responders, and essential service providers.
7. Increase the overall percentage of year-round residents on the island to support the vitality of our community, the availability of retail services in the off season and support the year-round island businesses.
8. Develop housing that contributes to smart growth initiatives enhancing the livability and vitality of Shelter Island – i.e., locate development in areas where transportation, infrastructure, and resources are already present

As noted previously, and as reflected in the goals formulated by the CHFAB (Goals #2, 3 and 4, in particular, consistent with Principle #3), it is worth highlighting again that a key, overriding priority for the preparation of a suitable Community Housing Plan was to ensure that its implementation strategy is at a scale that is appropriate for Shelter Island, respecting the Island's existing character and the sensitivities of its residents. The magnitude and nature of any future community housing must be able to integrate seamlessly into the existing development landscape.

2.0 Methodologies

Preparation of this Community Housing Plan for the Town of Shelter Island involved a range of methods to gather relevant information, analyze this information, and formulate recommendations. This process was overseen by the Community Housing Fund Advisory Board (**Section 2.1**) and included a robust program of community engagement (**Section 2.2**) and technical assistance provided by a planning consultant (**Section 2.3**).

2.1 Community Housing Fund Advisory Board (CHFAB)

The CHFAB was established by Town Board resolution in January 2022. The CHFAB serves in an advisory capacity to the Town Board and has been charged with overseeing the preparation of this Community Housing Plan, including the conduct of the community engagement program discussed in **Section 2.2** and directing the planning consultant whose role is described in **Section 2.3**. The CHFAB chair presented at Town Board work sessions and all CHFAB meetings were held on Zoom and available for the public to attend or view the recorded proceedings later.

2.2 Community Engagement

Broad community participation and effective communication contributes greatly to the quality of any planning process and increases the likelihood for success. Community engagement was an essential component in the development of the recommendations for this Housing Plan. Input received from the public identified priorities for, and preferences related to, community housing. To provide ample opportunity for the residents to provide input, two open houses were held by the CHFAB, and a coordinated questionnaire made available online for a month beginning on July 20, 2022. Paper copies of the questionnaire were also available at Town Hall.

Public Open Houses

The CHFAB conducted a public open house event on two dates to provide an educational forum for the Shelter Island Community Housing Plan and to obtain public input. The first open house was held on Saturday, July 16, 2022, at the Shelter Island Library and the second open house was held on Saturday, August 6, 2022 at the Presbyterian Church. At least 68 people attended the open houses.

The open house sessions were organized as a series of information display stations for participants to visit. Each station contained a poster board and a corresponding hand-out. The stations included information on the Peconic Bay Region Community Housing Act, smart growth, the need for community housing, housing fund uses, housing preferences, and community housing projects in the conceptual planning stage. Participants were provided with a packet upon arrival, which included a questionnaire that corresponded each of the stations to provide for a standardized format for public input, with additional space to allow for questions or further comments. Participants progressed through stations at their own pace and had the opportunity to revisit stations if desired. A Town representative was available at each station to facilitate discussion and to answer questions raised by the participants.

Online Housing Questionnaire

For those individuals who were unable to attend either of the in-person meetings, an online questionnaire was generated corresponding to the open-house packet. The online questionnaire mirrored the information and images presented at the open-house stations and asked the same questions to facilitate a single compilation of all community input. The questionnaire was made available on the CHFAB website and was publicized through the local newspaper, social media, and via direct emails from members of the CHFAB.

2.3 Technical Investigation

Nelson, Pope & Voorhis, LLC (NPV) was retained by the Town to provide technical assistance in the preparation of this Community Housing Plan. Among the services provided by NPV were research and analysis of census and other available data, review of prior planning studies, compilation and analysis of the public input received through in-person open house sessions and community questionnaire and drafting of this document based on the information compiled during the planning investigation.

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3.0 Inventory of Existing Conditions

3.1 Existing Housing and Demographic Setting

The existing housing and demographics of the Island are an important component of the setting which are provided as a part of the needs assessment in **Section 4.1** and **Appendix A**.

3.2 Existing Laws, Regulations and Plans

Peconic Bay Region Community Housing Act

The adoption of the Act resulted in an amendment to NYS Town Law to add a new Section 64-k to authorize each of the five East End towns to separately establish a Community Housing Fund, provide the authorized funding mechanisms (including by revenue collected from real estate property transfer tax of 0.5 percent), enumerate the requirements for the establishment of the fund, identify eligible expenditures of the fund, and require the establishment of an advisory board and adoption of a housing plan.

Eligible fund expenditures are as follows:

<p>1. Financial assistance to first-time homebuyers who are residents of the town for the purchase of a first home. Such financial assistance may be in the form of a grant or a loan. Additional details as follows:</p> <ul style="list-style-type: none">• The town may provide financial assistance for the purchase of a first home to a first-time homebuyer who is a resident of the town or who is employed in the town. A resident of the town shall include a person who is currently a resident of the town or a non-resident who has been a resident within the past five years.• Such financial assistance shall not exceed fifty percent of the purchase price of the home.• If such financial assistance is in the form of a loan, such loan shall be repayable to the town pursuant to the terms agreed to between the recipient and the town, provided that any loan shall be fully repaid by the recipient upon the resale of the home• For the purposes of calculating town tax liability for such property, only, the dollar amount of any financial assistance for the purchase of a first home made by the town pursuant to this section shall be subtracted from the full equalized assessed value of such property• All revenues received by the town from the repayment of a loan shall be deposited in the fund• The town may provide financial assistance for community housing in conjunction with a public/private partnership for employer assisted housing
<p>2. The actual production of community housing¹ for sale to eligible individuals² by the town</p>
<p>3. The actual production of community housing¹ for sale to eligible individuals² in conjunction with a public/private partnership, where the private partner agrees to comply with the profit guidelines of the New York State Affordable Housing Corporation and the provisions of this section</p>
<p>4. The actual production and maintenance of community housing for rental to eligible individuals² either by the town or the town housing authority; or in conjunction with a public/private partnership, where the</p>

private partner agrees to comply with the profit guidelines of the New York State Affordable Housing Corporation and the provisions of this section;
5. The rehabilitation of existing buildings and structures in the town for the purpose of conversion to community housing for sale or rental to eligible individuals ²
6. The acquisition of interests in real property in existing housing units, which will result in the production of community housing for sale or rental to eligible individuals ²
7. The provision of housing counseling services by not-for-profit corporations who are authorized by the United States department of housing and urban development to provide such services.
Notes: <ol style="list-style-type: none">1. As set forth in the Peconic Bay Region Community Housing Act, <u>Community Housing</u> is defined as “a primary residential property for an eligible individual that does not exceed one hundred fifty percent of the purchase price limits established by the State of New York Mortgage Agency low interest loan program in non-target categories for Suffolk County in effect on the contract date for the sale of such property”.2. An eligible individual is defined as a household with an income that does not exceed one hundred percent of the income limits as established by the State of New York Mortgage Agency low interest rate loan program in non-target categories for Suffolk County in effect on the contract date for the sale of such property. As of July 2022, this income level for a 1 and 2-person household income limit is \$174,360.

Community Housing: Chapter 51 of the Town Code

The purpose of this chapter is to create and sustain housing opportunities for income-eligible households in order to maintain the local economy, community services and the economic and social diversity that characterize the Town of Shelter Island. This legislation established:

- the Community Housing Board (CHB);
- a housing registry for income-eligible individuals or families who live and/or work in the Town or have previously lived in the Town;
- a procedure for permitting the renting a structure or part of a structure to eligible individuals with a Special Community Housing License (SCHL); and,
- conditions for a Community Housing Floating Zone (CHFZ).

The CHFZ was established for potential applicability to any property in the Town except the Near Shore and Peninsular Overlay District to facilitate community housing that is more creative and imaginative in its land use and design than is possible under the zoning regulations currently in place, with due regard for existing neighborhood development, economic feasibility, and environmental concerns.

Community Housing Fund, Chapter 52 of the Town Code

The Town Code of the Town of Shelter Island was amended, effective May 23, 2022, to include a new Chapter, Chapter 52, to establish the Community Housing Fund. Chapter 52 establishes a series of term definitions regarding community housing and eligibility, the purposes of the fund, eligible expenses, and the principles to which the Community Housing Plan should adhere to the degree practicable. These principles are founded in the tenets of smart growth, which covers a range of development strategies that are directed at enhancing the cohesiveness and economic vitality of communities, while also minimizing adverse environmental impacts that are associated with suburban sprawl.

Zoning Code: Chapter 133 of the Town Code

The Town of Shelter Island has 6 zoning districts including 3 residential use districts (A, AA and C Residential), 2 business districts (B and B1 Restricted Business) and the Causeway District to protect part of the causeway that leads to Ram Island. In the A and C Residential Districts, a minimum lot size of 40,000 SF is required and within the AA Residential District, a minimum lot size of 80,000 SF is required. A summary of the residential uses by zoning district is provided in the following table.

Zoning District	Single family	Two-family dwellings	Apartment as Accessory Use*	Boardinghouse**
A Residential	P	SP	P (upon conformance with §133-17)	X
AA Residential	P	X	P (upon conformance with §133-17)	X
B Business	P	SP by Town Board	P (upon conformance with §133-17)	SP by Town Board
B1 Restricted Business	SP by Town Board	X	X	X
C Residential	P	SP by ZBA	P (upon conformance with §133-17)	X
Causeway District	P (size restrictions)	X	X	X
Near Shore and Peninsula Overlay District	Based upon underlying zoning	X	X	X

Key: P: Permitted SP: Special Permit X: Not permitted

* An accessory apartment is defined as a separate dwelling unit, including a bathroom and a single set of kitchen facilities (a stove plus either or both a refrigerator and sink) not shared with any other unit, for permanent year-round occupancy established within an existing one-family dwelling or a building accessory to such dwelling.

**A boardinghouse is defined as a building with accommodations for three or more boarders, roomers or lodgers who are lodged for compensation, with or without meals.

As indicated in the table above, new accessory apartments for year-round occupancy are permissible in the A, AA, C and B Districts per the special use provisions of §133-17 of Town Code which includes general requirements, regarding owner occupancy, approval by the SCDHS for water and sewage disposal systems, licensing requirements, and design standards. §133-17 B also provided a mechanism for legalizing existing accessory apartments, whether seasonal or year-round to be brought into conformity of §133-17 by obtaining a license within 18 months of the effective date of the code provision.

The Near Shore and Peninsular Overlay District was created to protect the aquifer in the most sensitive areas of Shelter Island, where depletion of potable water and saltwater intrusion are most likely. Generally, this Overlay District has one or more of the following:

- The freshwater table is close to sea level and risk of saltwater intrusion exists or has occurred through consumptive use of available potable water.
- The land surface is close to the level of the freshwater table, increasing the risk of pollution of the aquifer.
- The land drains toward creek or bay waters, increasing potential pollution from surface or below-ground drainage.
- Density of development and anticipated future development threaten the ecologically sensitive areas.
- The land drains toward freshwater ponds which are hydraulically connected to outcroppings of the freshwater table which may result in pollution of the freshwater table.

As indicated in the table above, within the Near Shore Overlay District, new accessory apartments are not permitted; however, it is noted that accessory apartments that existed legally prior to the creation of the overlay district may only be used as short-term rentals.

Town of Shelter Island Comprehensive Plans

The subject of affordable housing (or community housing) is not a new one for Shelter Island. Shelter Island's 1994 Comprehensive Plan reported that only 6 percent of year-round households could afford to purchase a house of \$200,000, which at that time was less than the median value of an owner-occupied home on Shelter Island. The 1994 Comprehensive Plan cited goals to create and maintain affordable housing opportunities for a diversity of age and income groups, noting that young working households, first time homebuyers and seniors could benefit. It also recommended the creation of an organization on the Island to facilitate affordable housing.

The 2009 Comprehensive Plan Advisory Committee Report indicated that there had been little progress on the issue of affordable housing since completion of the 1994 Comprehensive Plan and acknowledged continuing challenges on this issue and noted limited progress in achieving the goals of the 1994 Plan for affordable housing.

The Shelter Island 2020 Draft Comprehensive Plan Update Housing Chapter evaluates and reaffirms the lack of moderately priced housing units and lack of year-round rental housing on Shelter Island. **Section 4.1** of this Housing Plan provides a summary of the detailed assessment of the housing and demographic trends provided in Appendix A to expand upon the Housing Chapter of the Draft 2020 Comprehensive Plan Update.

3.3 Results of Public Outreach

As discussed in **Section 2.2**, the community engagement process undertaken in preparing this Plan included a questionnaire to assist in identifying public preferences regarding community housing. A total of 159 individuals submitted either a paper copy of the questionnaire at one of the public open-house meetings or at Town Hall or answered the questionnaire on-line. The results of this questionnaire are summarized in a spreadsheet in **Appendix B**.

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4.0 Analysis

4.1 Housing Needs Assessment

The full housing needs assessment including the statistics utilized to support the narrative below can be found in **Appendix A**. It is noted that in addition to the analysis included in the housing needs assessment, the Town has provided the total number of expressions of interest received (expressing the need for community housing). For the years 2020 to 2021, there were 75 names on the list with an additional 14 names for 2022. A summary of the housing needs assessment is provided below.

The overall population on Shelter Island is increasing. The age distribution of the Island is changing as well, resulting in a growing senior population, and decreasing young population. School district data and Census data both support the conclusion that the trend is of population decline among young families.

The number of housing units is increasing, but these units are primarily owner-occupied single-family homes or seasonal homes. These types of units are expensive and typically not attainable for many segments of the population, such as single adults or young families. Home prices have been increasing over time and the increases in price have been exacerbated by the Covid-19 pandemic. Based on a housing affordability gap analysis, the median selling price of a home on Shelter Island is not financially attainable for households earning the median income on Shelter Island. In fact, households need to earn nearly double the median income in order to afford a house listed at the median selling price on Shelter Island.

There are very few renter-occupied, year-round housing units available on Shelter Island, and the number of this type of housing is continuing to decline. Competition for year-round rental housing will remain high as there are limited housing units overall, and very limited vacant housing units, which contribute to increased rental rates as demonstrated by the data. Based on a cost burden analysis, which defines “cost burdened” as households spending more than 30% of their income on housing, the percentage of renters that are cost-burdened has been escalating over time. The estimates for 2020 indicate the all renters on Shelter Island are currently cost-burdened, while the percentage of homeowners who are cost-burdened has been decreasing over time.

The need for less expensive housing units on Shelter Island has been documented in other planning documents, including the 1994 Comprehensive Plan which reported that only 6% of residents could afford a house costing the median home value in 1994. Goals and objectives in 1994 included creating and maintaining “affordable housing opportunities for the diversity of age and income groups that make up Shelter Island’s year-round population.” The plan identified young working households, first-time homebuyers, and elders as groups that could benefit from less expensive housing. The data compiled and analyzed for this needs assessment provide support that these trends in housing costs and increasing unaffordability have continued through 2020 and there is still a need for more affordable and diverse housing options.

It is challenging to identify exactly how many units of community housing are required to serve the year-round Shelter Island population. This is partially because former residents who had a need for community housing may have already moved off-Island due to unavailability of such housing and therefore are not included in the available statistics. It is noted that the draft 2020 Comprehensive Plan Update estimated that 20-40 affordable rental and purchases units were needed. A valuable tool to understanding the more specific, current needs for community housing would be to update the Shelter Island Community Housing

Registry with a robust outreach effort to more accurately quantify the population of interested residents and former residents who recently moved off-Island.

4.2 Community Preferences

As discussed in **Section 3.3**, the results of the public questionnaire were compiled into a spreadsheet, which is presented in **Appendix B**. This format facilitates an analysis of trends and community preferences on various aspects of the housing issue. The overall results of the community input identified a preference for the Town to focus on rental housing units and the need for identification of a housing agency or organization for management of community housing.

Summary of Input

The majority (over 65%) of questionnaire respondents believe that both the younger population and families are in the most need of community housing, while 28 percent of respondents identified the senior population as having the greatest need. Based on this input, further exploration is warranted to better understand the needs of the Island's growing senior population.

With respect to how community housing funds would best serve the Town's needs, the highest support was expressed for the rehabilitation of existing buildings, planning, design and other soft costs, purchasing land, implementation of housing for rent and counseling services by a not-for-profit organization. For-sale housing had markedly lower support than rental housing. This may be related to the only community housing project to have been implemented in the past which included for-sale units, which were not deed-restricted and therefore are no longer available as moderate-income housing for the island. There may be opportunities to implement for-sale homes in the future through a Community Land Trust (CLT) (see Section 5.2.3) – and it is stressed that any community housing implemented through the Fund will be required to remain affordable in perpetuity.

Comments received identified concern that the initiative to implement community housing could diminish focus on protection of the sensitive environment of the island, especially the protection of the aquifer. There were also comments which revealed a concern or lack of understanding about the use of Transfer of Development Rights (TDRs). While the option for applying the transfer of development rights was assumed to be feasible in the design concepts for community housing on Town owned sites, the Town's engineering consultant, PW Grosser, has since completed an analysis of TDRs and presented findings that a TDR program for Shelter Island is not acceptable to the Suffolk County Health Department due to the lack of public water supply. Therefore, any community housing project will be required to meet Suffolk County Sanitary Code (SCSC) which limits density of development. Finally, several responses indicated a concern regarding future management and oversight of community housing projects.

4.3 Available Options for Community Housing

Housing Types

A variety of housing types can serve as community housing, addressing a range of needs across different segments of the population, as determined by income, family status, age, and other factors. Some types of housing may be more suitable for or preferable to certain discrete groups in the community, but no

group would have its needs fully satisfied by a single type of housing and no single type of housing would suffice for the entire population. Accordingly, the most effective community housing plan involves multiple housing products.

As noted previously, the existing housing stock in the Town of Shelter Island is dominated by single-family residences, trending toward luxury homes, with the majority being occupied seasonally. These conditions are at the heart of the Town's desire to implement an effective community housing program, as set forth in this Plan, to provide a wider range of options that better serves the needs of those in the community who cannot afford the available housing. At the onset of this planning initiative, several housing types (i.e., physical forms) were identified as potential options for the Town of Shelter Island; among these housing types there is a further distinction between rental and for-sale units. There may also be additional categorization to direct housing to specific segments of the population, especially seniors, as typically accomplished by occupancy restrictions, which may be applied to various housing types, either for rental or ownership. The needs of other groups that benefit from community housing – such as empty-nesters, young singles, young couples and families, and first-time homebuyers – are generally addressed simply by offering a wider range of housing products that satisfy their preferences and financial capabilities (i.e., units that are smaller, clustered, and less expensive than the average single-family home).

Single-family Homes - Can be an option for community housing, generally as smaller units on smaller lots, and often with subsidies and/or other incentives to improve affordability. Single-family community housing can occur either as rental or ownership model; and management occur through a Community Land Trust or similar organization – see Section 5.2.3 for further discussion.

Accessory Dwelling Units (ADUs) - Second residential units on single-family lots, including attached, detached, and converted garages, units above garages, and separate units (with a separate entrance) within the main dwelling. In the Town of Shelter Island, ADUs are included in the definition of accessory apartment. Per Town Code Section 133-1, an accessory apartment is defined as a separate dwelling unit, including a bathroom and a single set of kitchen facilities (a stove plus either or both a refrigerator and sink) not shared with any other unit, for **permanent year-round occupancy** established within an existing one-family dwelling or a building accessory to such dwelling.

Cottage Communities/Pocket Neighborhoods - Groupings of small, individual units, typically centered around a green. Such developments would require properties large enough to achieve the required sanitary density or provision of wastewater treatment to conform with the standards of the SCSC, which would be a potential limiting factor in the Town of Shelter Island, as discussed elsewhere.

Two-Family Homes - Two attached units, with separate entrances, within a single structure. Per Town Code Section 133-1 (Terms Defined), a two-family home is defined as Dwelling, Two-Family – a detached structure containing two dwelling units.

Manor House Apartments - Multiple residential units (typically three or four units) contained within a single structure designed to look like a single home. A manor house apartment development on Shelter Island would require a property large enough to achieve the required sanitary density for the proposed number of units or provision of wastewater treatment to conform with SCSC which, as discussed above with respect to the cottage community format, would be a potential limiting factor in the Town of Shelter Island.

Apartments above Stores/Offices - Mixed-use development, can be appropriate within or near commercial centers.

Senior Communities - Age-restricted housing; many appear similar to cottage communities in form.

This plan identifies the type of housing that could be explored for the implementation of community housing and the particular project would be dependent upon land availability and adequate infrastructure. Individual projects would be evaluated through a public process as identified in the recommendations.

4.4 Constraints on the Provision of Community Housing

Zoning

Zoning laws which limit growth and density also drive-up home prices. Shelter Island's zoning ordinance requires minimum one to two-acre lots, which limits the ability to build denser housing units that are more affordable and to create walkable centers for community housing in places that would best support them. In addition to zoning limitations, development density is also dependent on other factors such as sanitary and public water availability as discussed below.

With respect to Accessory Dwelling Units, or accessory apartments, Shelter Island's zoning code only permits year-round rentals of accessory apartments, except in the Near Shore Overlay District. Town code sets limits on the rent that can be charged, and requires a SCHL; however, due to the lack of inventory and high demand for short-term rentals, it is believed that a significant number of units have been removed from the long-term rental market to meet this seasonal demand. This is contrary to the town zoning code and the goals of the Housing Plan; however, there is a provision in the Town administrative code that permits short term rentals.

Although Chapter 51 permits the creation of an Affordable Housing Floating Zone, the realities of a lack of infrastructure and sensitive environment, limit the feasibility of such a district without the provision of public water and sanitary treatment, as discussed below.

Suffolk County Sanitary Code

The intent of the SCSC is the protection of groundwater, and Article 6 of SCSC identifies development limitations throughout the County based on the characteristics of the aquifer. Article 6, adopted in 1981, delineates geographic boundaries for "Groundwater Management Zones" (GWMZ). The Town of Shelter Island is located within GWMZ IV. Article 6 further establishes density limitations in unsewered areas to control nitrogen load from on-site sewage disposal and the associated impacts to groundwater and surface water resources. In unsewered areas within GWMZ IV, Article 6 requires single-family lot sizes to be a minimum of 40,000 square feet (SF) where public water is not available; and in areas with public water, the minimum lot size may be reduced to 20,000 SF. For design flow purposes, a single-family dwelling unit is defined by the SCSC as generating 300 gallons per day. Therefore, Article 6 limits density to one dwelling unit per acre in unsewered areas without public water and two dwelling units per acre in areas with public water; or an allowable sanitary design flow of 300 GPD/acre without public water and 600 GPD/acre with public water.

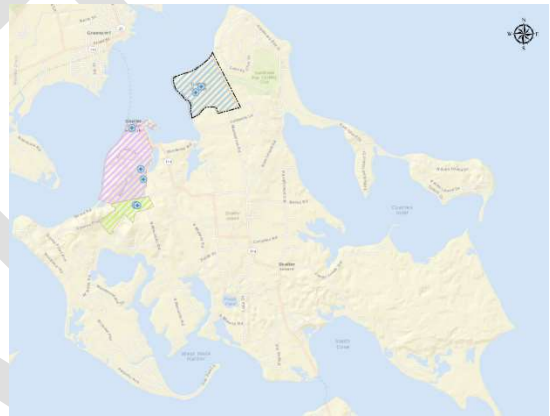
It is noted that the presence of an accessory apartment within the main dwelling does not affect the foregoing sanitary density calculation under the SCSC. However, the sanitary system needs to provide sufficient capacity to allow for the total number of bedrooms including those in the apartment. Based

upon the age of the housing stock, for most residences on Shelter Island, an upgraded sanitary system would be required to construct an accessory apartment.

Shelter Island Heights is the only area on the Island that has a sewer district. The rest of Shelter Island has on-site waste disposal systems, the majority of which are cesspools and sanitary systems. On Shelter Island, Innovative/Alternative (I/A) Onsite Wastewater Treatment Systems are required for new developments, where a septic system is being repaired, replaced, or expanded (e.g., to accommodate an accessory apartment), or where it is determined that a septic system is substandard and does not meet SCDHS standards. The expense for installation of an I/A system could discourage the implementation of new accessory apartments.

Public Water

Shelter Island's water supply is drawn from the Upper Glacial aquifer and only a small percentage of the drinking water on the Island is supplied through public water systems. The image at right shows the water districts on Shelter Island (including the Village of Dering Harbor). The remaining water, throughout the vast majority of the land area on Shelter Island, is obtained via private wells. This lack of a public water supply is why a TDR program is not permissible under SCSC (since such a program would allow additional density and associated sanitary discharge on receiving properties served by private wells).



5.0 Objectives and Recommendations

The discussion below presents a series of objectives and recommendations for the Town of Shelter Island Community Housing Plan. The objectives are more specific statements describing means by which the goals of the Plan can be advanced. The recommendations are a set of specific actions to implement these objectives and advance the underlying goals.

5.1 Objectives

Objectives for implementation to help advance the goals of this Community Housing Plan have been developed to provide an overall roadmap of the vision for community housing on Shelter Island. As the Community Housing Plan is implemented and updated over time, these objectives may also be revisited and revised as appropriate to reflect the most recent conditions and housing/demographic trends on Shelter Island.

These objectives are based on feedback from the community, data regarding recent demographic trends, and analyses of zoning and environmental constraints present on Shelter Island. The objectives have been grouped together based on the estimated implementation timeline into the categories of short-term, mid-term, long-term, and ongoing actions in order to identify priorities. The recommendations outlined in **Section 5.2** seek to support and provide more details on how to achieve these objectives.

Short-Term Objectives

The short-term objectives are focused on the next five years of implementation. The main priority is to have at least ten new units of community housing available. Some of these units may be the result of new construction; however, it is anticipated that this would also include creative solutions such as the conversion of short-term rentals to year-round rentals and other policy or management initiatives.

The main focus for the short-term is on expanding rental units, rather than for-sale units, since rental units had more support from the community, are seen as more feasible at this time and the provision of rental units would better serve the identified need for year-round housing being made available in the more immediate future. More specifically, the focus is to implement new rental housing on Town-owned land that complies with the current requirements of the Suffolk County Sanitary Code. The management structure for these new units needs to be determined and options will be explored so that the management is not a responsibility of the Town. The selected management entity, which could include a non-profit or established housing authority of a nearby municipality, will be responsible for administering the lottery from a list of eligible individuals, managing lease agreements, rent collection, maintaining the units, and ensuring that units continue to serve as community housing.

Other priorities for the short-term include increasing year-round accessory dwelling units through code amendments and enforcement. It is important to update the existing registry list for community housing to obtain a sense of the demand for these types of units. Educational materials and resources, such as a Homeowner's Guide to ADUs, are envisioned for the short-term as well.

Ongoing Objectives

The ongoing objectives include actions that are accomplished in the short-term and some of which may continue throughout future phases. Researching appropriate partnerships for management of community housing is under way and will continue until a management agency is selected and the details of a partnership are determined. In addition, research is in progress about other models of implementing community housing, such as the Community Land Trust model and Habitat for Humanity partnerships.

The development and implementation of Design Standards for community housing is an important priority of the CHFAB and community to ensure that any new housing is consistent with the character of Shelter Island, minimizes environmental impacts, and is developed in a way that is safe and comfortable for residents. This important work will continue throughout program implementation.

The needs assessment demonstrates that the senior population on Shelter Island is increasing, and this population may have unique housing needs. While the community outreach included some information about senior housing, it is necessary to conduct additional outreach specifically directed towards the senior population to better understand their needs and their interest in aging in-place and supportive housing.

Finally, the ongoing objectives also include implementing creative solutions for increasing community housing. The feasibility of relocating homes slated for demolition and salvaging building materials, as practical, will be explored, as well as identifying other funding sources and incentives for creation of community housing.

Mid-Term & Long-Term Objectives

In the mid-term period, defined as 5-10 years into the future, the main goal is to have ten additional community housing units through both new construction and other housing conversions. Options for expanding rental units will continue to be explored by considering additional units on Town-owned land, only if the necessary infrastructure becomes available. At this time, it is recommended that the potential for apartments above stores and offices be evaluated, in order to ensure that these types of units could be supported in the future.

In addition, another priority over the mid-term is to consider the potential of adding for-sale units to the community housing stock on Shelter Island to serve a wider range of residents. Effective mechanisms, such as deed restrictions, will need to be implemented to ensure that for-sale units remain affordable upon resale in perpetuity.

Long-term objectives are focused on a time period beyond ten years into the future. During this phase of program implementation, it is anticipated that the construction new community housing will become less feasible due to a lack of additional Town-owned land appropriate for such use. As currently envisioned, it is recommended that the long-term objective shift from the creation of new units through construction and conversion to providing low interest loans and housing counseling services to enable eligible individuals and families to take better advantage of existing community housing opportunities.

5.2 Recommendations

Based upon the community input obtained throughout the planning process and the subsequent analysis, the recommended priority actions for expanding community housing opportunities on Shelter Island are outlined in the subsections below. This discussion identifies the community housing options that are most appropriate for the Town of Shelter Island, in the context of available information. The community input and evaluation of the Town's environmental resource sensitivity, as well as limitations on the availability of public water supply and sewage disposal capacity, indicates that large-scale, multifamily developments are inappropriate for the Town of Shelter Island. Such intensive uses have high resource demands and are out of character with the community and, therefore, are not recommended.

5.2.1 Recommended Priority Fund Uses

The following activities were identified as priorities for the use of public funding including, but not limited to, the Community Housing Fund, in the general order of recommended priority:

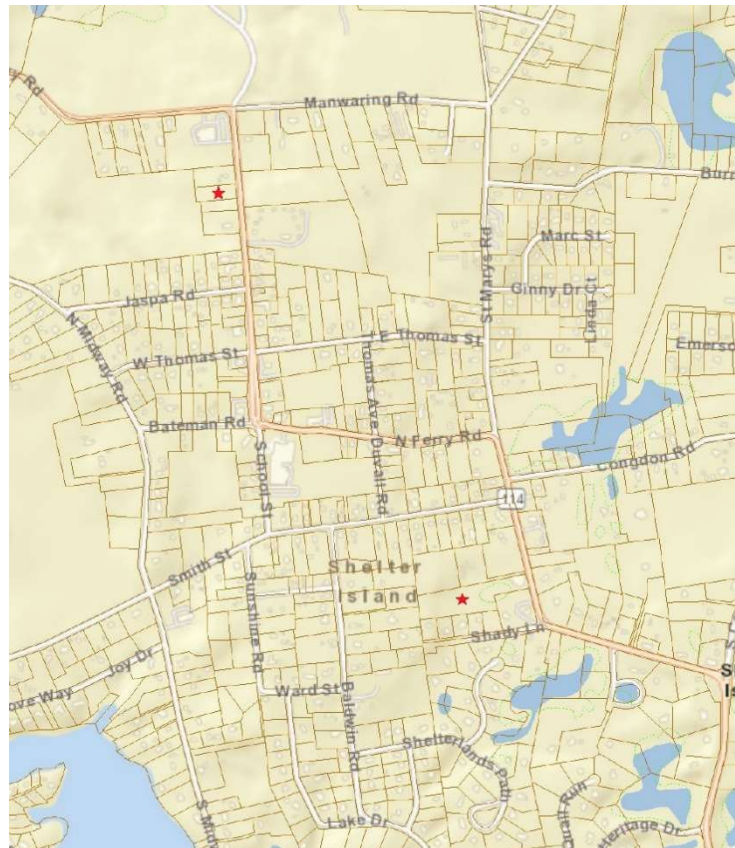
- Construction of housing for rent on Town-owned land which meets current density requirements of the SCSC
- Support additional Accessory Dwelling Units (ADUs) ("Accessory Apartments" per Town Code) – A key means of implementing this general recommendation is through the development of a Homeowner Guide to ADUs (see further discussion in Section 5.2.2)
- Purchase of land and/or buildings for community housing
- Rehabilitation of existing buildings for rental units
- Planning, engineering, design costs
- Housing counseling services

These priorities were identified through the public outreach initiative. The actual expenditures and priorities for funding will be refined based on further analysis and depending on the funding that becomes available.

5.2.2 Focus on Planning and Implementation of Rental Housing

Rental Projects on Town Land

The CHB has explored development opportunities for two Town properties (see the following image for the location of the properties). These locations are being considered as appropriate opportunities for community housing as they are proximate to local community resources and along a main roadway, consistent with smart growth principles.



Map of North and South Ferry Road Town Project Locations

Development concepts were formulated when there was potential for transferring sanitary density rights to allow for additional community housing units (i.e., an increase in development density above what is currently permitted under the SCSC). It is noted, as discussed previously, that the Town's engineering consultant, PW Grosser, has determined that the feasibility of implementing a TDR program on Shelter Island for the purpose of achieving an increased density for community housing is not realistic at this time, due to the lack of public water supply systems. As discussed in **Section 4.3**, this is based on a SCSC flow limit of 300 gpd/acre, which permits the construction of one single-family home per 40,000 SF lot.

Therefore, it is recommended that the short-term objective for the Town properties be to develop a plan for each site which conforms to SCSC standards but is designed in a way that could be expanded if the necessary infrastructure becomes available in the future. It is noted that the SCDHS acknowledges that accessory apartments within the main structure on residentially zoned properties do not require additional lot area to conform to SCSC, which indicates a potential means of providing additional units in a manner that conforms with the applicable regulatory constraints.

The Town may wish to implement a process for the solicitation of architecture and engineering designs for specific properties that are consistent with the goals of this plan including architectural context and smart growth design standards. A Request for Proposals (RFP) can be prepared with guidance and a set of criteria through input from the CHB and the Town Board. Proposals could then be reviewed for responsiveness by the CHB and forwarded to the Town Board for consideration through a public hearing process to obtain community input.

Support Accessory Dwelling Units (ADUs) through the Development of a Homeowners Guide to Accessory Apartments on Shelter Island

As with most Long Island municipalities, particularly on the East End, understanding development constraints on Shelter Island is complex and difficult to understand for most residents. Therefore, the preparation of a Homeowner's Guide to Accessory Apartments is recommended to provide a resource for homeowners to obtain answers to questions regarding ADUs, including the feasibility of approval for an accessory apartment and expectations regarding:

- Code Requirements
- SCDHS Requirements, including provisions pertaining to:
 - Lot size
 - Sanitary system upgrade
 - Water certification
 - Whether an accessory apartment would be feasible given the location and lot constraints
 - Expectations for the renting of an accessory apartment
 - Planning/design services to support the creation of additional ADUs (identify typical or template design plans that are generally appropriate for Shelter Island)
 - Other costs associated with ADUs for community housing
 - Requirements for conversion of accessory structures into ADUs
- Funding opportunities, including the availability of:
 - Grants for I/A sanitary systems
 - Loans

Legislative Actions to Facilitate the Provision of ADUs

Certain legislative actions may help to facilitate the objective of increasing the availability of ADUs to serve as community housing. In particular, enhancing existing Code provisions which already limit ADUs to long-term occupancy could increase the degree of compliance, which would be expected to move short-term rental units into the long-term market, thereby better serving the Town's community housing goals. As a first step, this approach (i.e., activating existing rental units for year-round occupancy ADUs) should take precedence over new construction. A graduated program of enforcement typically helps to increase the prospects for success; this may involve an initial period of amnesty and incentives to encourage voluntary compliance (potentially including property tax rebates), followed by escalating enforcement (including increasingly higher fines for continuing non-compliance).

Apartments over stores/offices

An additional priority reflected in a high response rate to the questionnaire involves the creation of additional community housing in apartments above stores/offices through the expansion of existing store and offices. The preferred location for this type of development would be in the heart of the Center, an

area which is in close proximity to the library, school, municipal building, court, police department, and shopping. The Center would benefit from additional retail and residential development which, through creative planning and building design, could become a vibrant area benefiting the community at large. However, due to the lack of infrastructure in the Center, apartments above stores/offices should initially be encouraged in the Business B District, where public water and sewage treatment could be made available. It is recommended that a thorough review of the existing Town Code be conducted to identify any obstacles to implementing apartments above stores/offices to determine if code amendments are required to support this housing type. It is noted that a code change would be required, while accessory apartments are permitted in the Business B District as an accessory use, as defined by Town Code, an accessory apartment is defined as “a separate dwelling unit... established within an existing one-family dwelling or a building accessory to such dwelling”. The Town may wish to consider exploring the option of permitting a Dwelling Unit as a special exception accessory use within the Business B District with appropriate standards (such as required off street parking and land use compatibility).

5.2.3 Management Options

Achieving the objectives of this Community Housing Plan will require the establishment of an effective management structure, including assigning a Town entity with the responsibility to coordinate and oversee program implementation (which may be the CHB or another Town board, committee or agency). It would also be helpful to have the assistance of an organization(s) with special expertise in community housing. In the short term, it is recommended that the Town explore the desirability of enlisting the assistance of a Housing Authority, Non-Profit Housing Organization, or other appropriate entity to manage the community housing for the Town projects. A Community Land Trust (CLT) could provide the ideal management solution for the Town over the long term; however, establishment of a CLT requires considerable effort and typically is not quickly achievable. Thus, other management options would be required to provide assistance in the immediate term. The Town Board would have the authority to authorize an agreement with one or more outside housing organizations to provide the necessary assistance.

Responsibilities of the management organization would include ensuring participant eligibility, conducting housing lotteries, ensuring that all revenues received from community housing is deposited into the fund for exclusive use in the community housing program, and following standard procedures to ensure that community housing units remain affordable in perpetuity.

Advisory Board

The Town of Shelter Island already has an established Community Housing Board (CHB), independent of the CHFAB, pursuant to Town Code Section 51-5 to review and make recommendations regarding community housing. The CHB consists of residents of the Town of Shelter Island and as per Code “will include a broad representation of the community such as landowners, persons with skill and knowledge about the environment, real estate, finance, and building.” The Peconic Bay Region Community Housing Act required the establishment of the CHFAB, which was specifically created to provide the recommendations and strategies for increasing community housing through the fund; however, it is anticipated that this advisory group will be dissolved once the Plan has been completed. As the CHB already has been established with advisory authority for making recommendations for community

housing, outside of the limited role assigned to the CHFAB in the preparation of this Community Housing Plan, it is recommended that the authority of the CHB continue in overseeing the implementation of this Plan and that this role be expanded to include projects funded through the Peconic Bay Region Community Housing Fund and other funding sources pursuant to this Plan.

During the course of the preparation of this Community Housing Plan, the members of the CHFAB recognized the importance of their collective breadth of experience and knowledge in crafting the recommendations presented herein and believe that requiring such broad-based representation on the CHB would better serve the Town's goals for community housing as set forth herein. Therefore, it is recommended that Chapter 51 be strengthened to require membership of the CHB to include at least one representative of each of the following:

- The construction industry (building, engineering, architecture)
- The real estate industry
- The banking industry
- A resident of the Town meeting the definition of an eligible individual under the Peconic Bay Region Community Housing Act

If necessary to achieve the range of experience and knowledge identified above, it may be appropriate to increase the size of the CHB.

Chapter 51 outlines the primary functions of the CHB at present, which are:

- Review applications for special community housing licenses
- Participate in the review and approval process on all applications for establishment of a Community Housing Floating Zone (CHFZ)
- Make recommendations to the Town Board relating to community housing eligibility requirements and how established
- Establish and maintain the Town's housing registry
- Serve as a liaison for community members regarding community housing
- Interface with state, county and municipal bodies and other organizations that have similar missions for the purpose of promoting community housing opportunities on Shelter Island.

It is recommended that Chapter 51 be updated to include a specific function for the CHB to explore potential opportunities for expanding the availability of community housing and to make recommendations to the Town Board for the expenditure of funds to undertake planning and feasibility studies, design of potential community housing projects, acquisition of properties to accommodate community housing. A Code revision would also be required to assign the CHB (or other municipal board, committee or agency, at the discretion of the Town Board) the responsibility for program oversight, including coordination of outside entities providing technical assistance (see further discussion below).

Initial Program Management

In order to ensure the best outcome for Community Housing and the creation of housing opportunities that meets with the stated goals of this plan, it is believed that the Town would be best served by working with an established community housing authority or similar organization to develop and manage all projects, at least during the initial phase of the first five-year (short-term) period for Plan implementation. Possible partners serving in this mentoring capacity include an existing municipal housing authority (e.g., Town of Southampton or East Hampton) or a nonprofit organization whose specific mission and specialization involves the provision of community housing.

The Town should research available options for management and administration of the community housing program for the initial implementation period. Such management options can be accomplished through an intermunicipal agreement (IMA) with a nearby town's housing authority, or through an analogous agreement with a nonprofit entity. The term of such agreement should be established based upon the consideration that the establishment of a Community Land Trust may occur in future to replace the initial program implementation phase (see discussion below).

Community Land Trusts

Community Land Trusts (CLTs) are nonprofit organizations that maintain community control of property where community housing is located. CLTs obtain land for the construction of housing, and also purchase homes and other buildings that have been abandoned, are underutilized, or in need of rehabilitation to refurbish them for residential use and the creation of permanent community housing.

CLTs often fund acquisitions using State grants or other sources and retain ownership permanently, thereby reducing the land costs associated with the real estate and the cost to future residents. Homeownership programs are generally more common than rental programs in CLTs; however, there are models in which a land trust owns and manages rental units as well. CLTs can help mitigate displacement impacts of rising housing costs and support families so they can stay in and grow with their communities. CLTs can oversee construction and management of community housing, receive donations of buildings in need of renovation or conversion for housing and purchase of existing houses for community housing.

5.2.4 Establish a Process for Community Housing Project Evaluation and Approval

An evaluation and application process for community housing projects will need to be defined by the Town. It is recommended that funding applications for such projects follow a similar procedure that already is in place for the Community Preservation Fund, as amended to best serve the needs for of the Community Housing program. As with the Community Preservation Fund, a properly noticed public hearing would occur for any project, where the public would have an opportunity to contribute to the official public record prior decisions on applications. For projects on Town-owned land, it is further recommended that a public process be established to obtain input early in the design process.

5.2.5 Outreach and Public Education

As noted throughout, public participation and input have been critical to the preparation of this Community Housing Plan, and continuing public involvement is equally important to ensuring the success of Plan implementation. The following additional outreach initiatives are recommended.

Continuing Outreach

- Publicize and make available the Homeowner’s Guide to ADUs, as recommended above
- Supplement the input received during the preparation of the Community Housing Plan to better understand housing needs of the Shelter Island’s growing senior population, for future consideration. The detailed data regarding the Town’s senior population and their housing needs are to be collected through interviews
- Publicize that the Town is updating their “expression of interest” list of people interested in to living in community housing and use this information to supplement the needs assessment

Counseling

- Facilitate the provision of housing counseling services to potential homebuyers and individuals seeking community housing through a non-profit organization

5.2.6 Update the Housing Plan

Maintaining the relevancy of this Community Housing Plan over time will necessitate that it be kept up to date to reflect the progress and status of the implementation recommendations set forth herein, changes to demographic and housing conditions in the Town, revisions to applicable regulations and laws, evolving land use trends and practices, and other relevant factors. Accordingly, it is recommended that this Plan be comprehensively reviewed and updated periodically; a regular update period of five years (as specified in the Peconic Bay Region Community Housing Act) is recommended. Additional, interim Plan updates may be appropriate at intervals of less than five years if changes to the factors listed above are of such a magnitude or nature to warrant such action.

The process followed for Plan updates should be similar to the process involved in this preparation of the present document. In particular, it will be important to have a robust process of public outreach to obtain useful community input, as was the case for the preparation of this document.

5.2.7 Implement Design Standards for Community Housing

Design standards provide specific guidance for development projects to ensure that they are consistent with the community’s objectives and expectations, thereby avoiding suboptimal outcomes that unnecessarily offset or detract from the intended benefits. As a general matter for Shelter Island, the objective of this recommendation is to achieve the benefits of providing an increased supply of community housing in a manner that does not adversely impact the Town’s overall environmental quality and character. Specific design standards that were identified during the community planning process include:

- Conform with all applicable provisions of review and approvals within town, county and state codes.
- Require incorporation of features for the safety and well-being of the residents (e.g., orientation of entrances for visibility, lighting that is adequate but not excessive, etc.)
- Require high quality design and architecture that fits in with or elevates the local community character
- Construct with the most advanced and highest practicable level of green, sustainable practices and architecture in order to balance the economies of building design with energy efficiency and sustainability
- Require innovative design to incorporate sustainability features as practicable including, but not limited to, use of locally sourced materials and reuse of salvaged building materials where appropriate, energy-saving and water-conserving plumbing fixtures, incorporate design features consistent with the goals for climate-smart communities
- Require low-impact design landscaping to reduce or eliminate the need for irrigation and maintenance
- Include native plant species in landscape plans that provide habitat and attract pollinators

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6.0 Next Steps

This Plan is intended to serve as the stand-alone community housing element of the Town's Comprehensive Plan Update (currently in preparation) and, as such, is not associated with any specific development proposal. The goals for housing in this Plan are broad; and while the Community Housing Board (CHB) has reviewed potential conceptual development plans, any future proposals for development would be required to obtain all necessary approvals through the Town Board, Planning Board, SCDHS (with regard to provisions governing sanitary waste disposal) and possibly other agencies, by means of a public review process. Such development proposals also would be subject Town zoning and require building permits. In addition, as with any action by the Town, development projects that are proposed pursuant to this Plan would be subject to the requirements of the New York State Environmental Quality Review Act (SEQRA).

Implementation of the recommendations in **Section 5.0** will require a number of governmental actions, primarily by the Shelter Island Town Board. These actions include:

- Post the Draft Community Housing Plan for the Town of Shelter Island on the Town Website to facilitate public review and comment
- Conduct a Town Board public hearing on the Draft Community Housing Plan
- Finalize and adopt the Community Housing Plan, including completion of a SEQRA review process as applicable
- Implement associated actions recommended in the Community Housing Plan, following completion of a SEQRA review process as applicable.

A public referendum is mandatory in order for the Town to have access to CHA funding (i.e., 0.5 percent levy on local real estate transfers); this referendum is scheduled for November 8, 2022. While the Town has already established the necessary legislation, the Town Board will be required to undertake additional actions related to local implementation of the Community Housing Plan. If the referendum is unsuccessful, the provisions of this Plan would still be valid once adopted by the Town Board, but financial resources other than the CHA real estate transfer levy would have to be accessed in order to undertake those activities that require funding.

APPENDIX A

Housing Needs Assessment

Needs Assessment

The purpose of this assessment is to compile a data-based foundation to analyze the potential need for community housing on Shelter Island. An important component of the needs assessment is an analysis of demographic trends over time to study the patterns and changing conditions on the Island to evaluate evolving housing needs. The needs assessment includes an analysis of population, housing, and economic trends in 2000, 2010, and 2020 as well as a housing affordability gap analysis and cost-burdened analysis.

This assessment includes information from the Draft Shelter Island 2020 Comprehensive Plan Update and the following sources:

United States Census Bureau provided the population, housing and economic statistics for the 2000 Census, 2010 Census & American Community Survey (ACS) Five-Year Estimates, and 2020 ACS 5-Year Estimates. All analyses were based on the Shelter Island and Shelter Island Heights Census-Designated Places (CDPs).

Environmental Systems Research Institute, Inc. (ESRI) generated on-demand demographic reports specific to the Shelter Island and Shelter Island Heights CDPs through their Business Analyst Online program. All estimates provided by ESRI draw upon data from sources including the Current Population Survey, American Community Survey, Census of Retail Trade (all via the United States Census Bureau), Consumer Expenditure Survey (via the United States Bureau of Labor Statistics), United States Postal Service, Internal Revenue Service, National Bureau of Economic Research, and other commercial and federal data sources.

New York State Education Department provided enrollment data and information regarding the number of students that are economically disadvantaged for the Shelter Island Union Free School District (UFSD).

The Shelter Island Assessor provided the number of real estate transfers and median sales prices of non-vacant residential properties by year from 2014 to June 2022.

Population

The year-round population on Shelter Island has been increasing over time. Between 2000 and 2010, the population was estimated to increase by approximately 7%. For this analysis, estimates of the 2020 population were obtained from the 2020 ACS 5-Year Estimates and compared to estimates from the Shelter Island Draft 2020 Comprehensive Plan Update as shown in **Table 1**. Between 2010 and 2020, the population increased somewhat significantly by approximately 15%. The Draft 2020 Comprehensive Plan Update includes 2020 populations estimates for two scenarios: “with Covid” and “without Covid.” The “with Covid” estimates are essentially the same as the ACS estimates. The “without Covid” estimates represent a more modest population increase of approximately 3% from 2010. All estimates analyzed indicate an increase in population and a 2020 population of 2,743 year-round residents was utilized in this analysis.

Table 1
Shelter Island Population

Year	Population	% Change
2000 Census	2,215	-
2010 Census	2,381	7%
2020 5-Year ACS Estimates	2,743	15%
Draft 2020 Comprehensive Plan Update – Best estimates for 2020 population without the pandemic	2,463	3%
Draft 2020 Comprehensive Plan Update - Best estimates for 2020 population with the pandemic	2,745	15%

As discussed in more detail in the Draft 2020 Comprehensive Plan Update, no direct data is available on the current population of part-time, summer, and visitor populations. Suffolk County estimated the seasonal population in 2018 based on various multipliers. More detailed studies would need to be conducted to understand the seasonal population; however, it is noted that the intent of this Housing Plan is to focus primarily on the year-round population of Shelter Island.

Age Distribution

As discussed in the Draft 2020 Comprehensive Plan Update, the year-round population on Shelter Island shows age distribution trends that are consistent with other affluent communities. More specifically, these trends include a relatively high median age; fewer people in the younger adult cohorts; and a high percentage of the population over 50 years old. In addition, the Draft Update notes that Millennials (born 1981-1996) and Gen Z (born 1997- 2012) are underrepresented, partially due to the lack of affordable housing for groups at the height of or beginning careers and families.

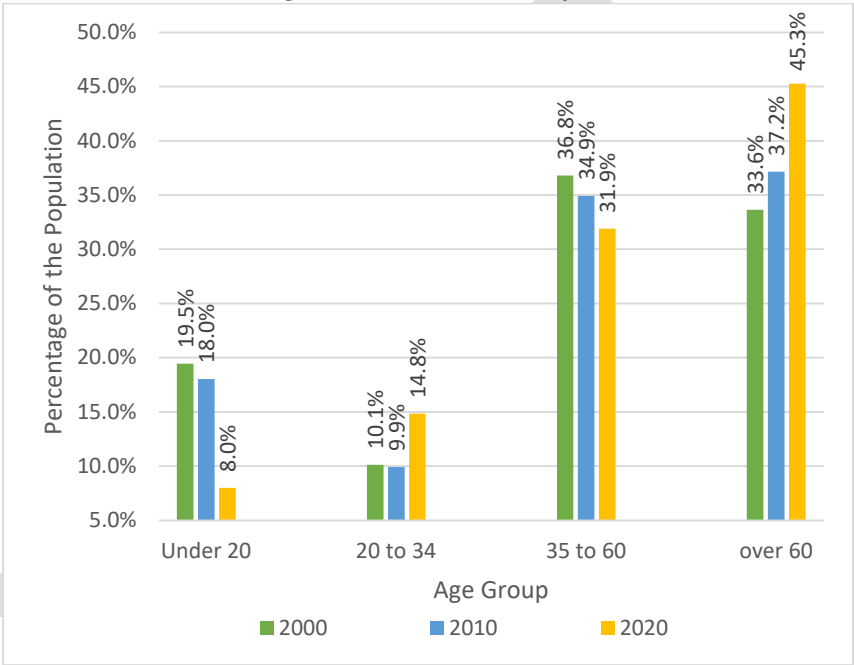
The age distribution of the year-round population is shown in **Table 2** and **Graph 1**. The population of young people (under 20) has declined significantly in the past twenty years from nearly 20% to 8% of the total year-round population. The 20-34-year-old population increased slightly; but when looking further into data, this growth was almost entirely in the 20-24 range, with very little growth in the 25-34-year-old population. This likely represents adult children graduating from college and returning to their family homes.

The 35-60-year-old population has remained fairly constant at slightly over 30%, while the senior population (over 60 years old) has increased to approximately 45% of the total year-round population. These changing demographics indicate a need to analyze if additional types of housing such as senior units are needed to support the year-round population.

Table 2
Shelter Island Age Distribution Over Time

Age Range	2000	2010	2020
Under 20	19.5%	18.0%	8.0%
20 to 34	10.1%	9.9%	14.8%
35 to 60	36.8%	34.9%	31.9%
Over 60	33.6%	37.2%	45.3%

Graph 1
Age Distribution Bar Graph

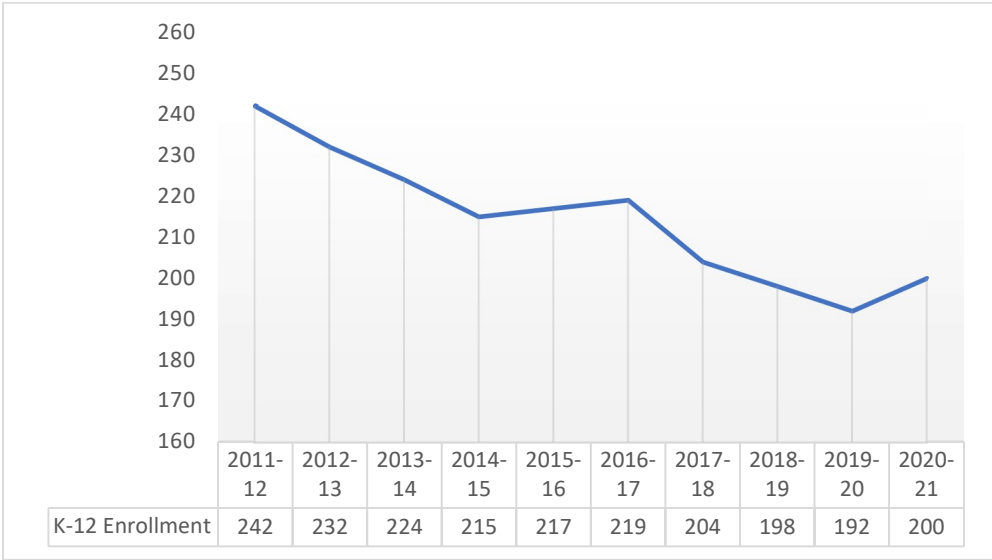


School District Trends

The number of children enrolled in the Shelter Island UFSD has been fairly steadily declining in the ten years analyzed, as shown in **Graph 2**. The 2011-2012 school district enrollment was 242 students, which is the largest student population observed in this analysis. By the 2019-2020 school year, the number of students decreased to 192. There was a slight increase in the number of students in 2020-2021, likely due to seasonal residents residing on the Island full-time during the height of the Covid-19 pandemic and enrolling their children in the local schools.

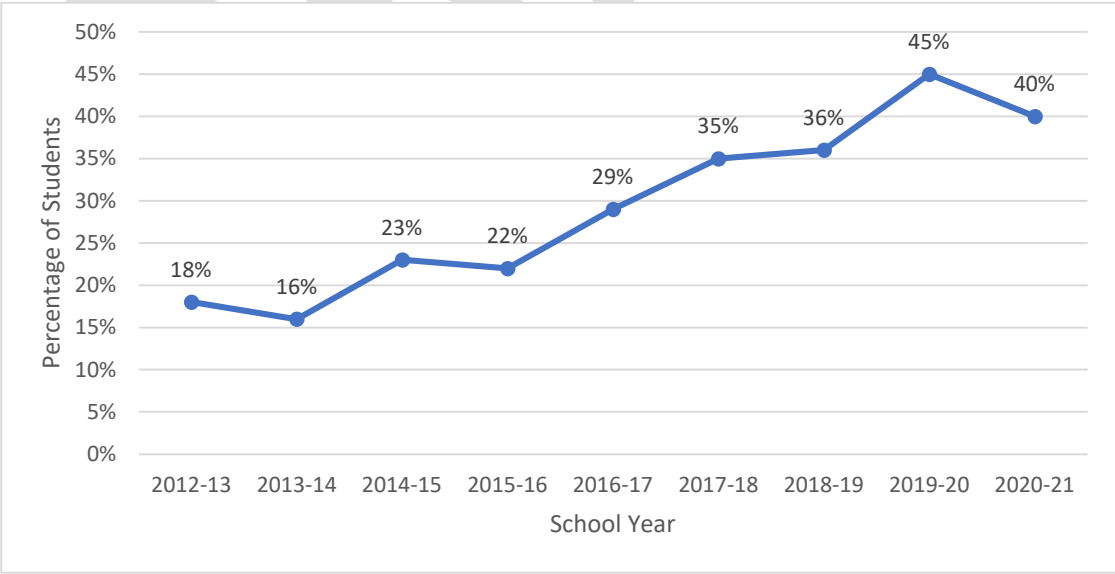
The trends observed in the school district population support the overall population trends from the Census Bureau data showing a decline in the population of young residents. As young families are unable to afford housing on Shelter Island, they may move to other communities and remove their children from the school district.

Graph 2
School District Trends



The Shelter Island School District provides information about the number of students that are economically disadvantaged each year. Economically disadvantaged is defined as students who participate in economic assistance programs, such as free or reduced-price lunches, social security insurance, food stamps, and other similar programs. In the 10 years analyzed, the percentage of students considered economically disadvantaged has increased every year with the exception of 2020-21, as shown in **Graph 3**. The decrease in 2020-21 likely represents the addition of new students of relatively wealthy families residing full-time on Shelter Island during the pandemic.

Graph 3
Percentage of Economically Disadvantaged Students



Length in Residency

Table 3 provides data on the year that year-round residents moved into their current housing unit. Almost half of homeowners moved in between 2000 and 2009. A significant portion of homeowners also moved in prior to 2000 (an additional 40% of the population). More recently, there has been an uptick in new homeowners moving into their homes during 2019 or later, which is likely related to the Covid-19 pandemic.

The trends in renter-occupied housing units are opposite of the trends in owner-occupied units. It is estimated that all renters moved into their current housing unit between 2010 and 2018, whereas very few homeowners moved into their housing units during this time period (approximately 3% of the total).

Table 3
Occupied Housing Units by Year Householder Moved into Unit

Year Moved into Unit	Owner-Occupied Units	Renter-Occupied Units
Total	100.0%	100.0%
Moved in 2019 or later	7.6%	0.0%
Moved in 2015 to 2018	1.6%	63.7%
Moved in 2010 to 2014	1.5%	36.3%
Moved in 2000 to 2009	48.5%	0.0%
Moved in 1990 to 1999	12.8%	0.0%
Moved in 1989 or earlier	28.0%	0.0%

Median Income

The household median income in the Town has increased significantly in the past 20 years to an estimated \$114,082 in 2020, as illustrated in **Table 4**. This increase in median household income could be related to wealthy residents moving into the community and/or households earning less than the median income leaving Shelter Island.

Table 4
Median Household Income

Year	Median Household Income
2000 Census	\$43,625 (SI CDP), \$65,446 (SI Heights CDP)
2010 5-Year ACS Estimates	\$61,438 (SI CDP), \$75,724 (SI Heights CDP)
2020 5-Year ACS Estimates	\$114,082

Average Household Size

Trends in the average household size on Shelter Island is shown in **Table 5**. Average household size has been decreasing over time from 2.24 residents per household in 2000 to 2.12 residents per household in

2010. This trend continued in 2020, with an average household size of 1.99 residents per household. These findings are consistent with the 2020 Comprehensive Plan Update which found that Shelter Island has had the smallest average household size of all towns in Suffolk County in all census years since 1960.

Table 5
Average Household Size

Year	Average Household Size
2000 Census	2.24
2010 Census	2.12
2020 5-Year ACS Estimates	1.99

Housing Stock

The total number of housing units on Shelter Island has increased during the 20 years analyzed, as indicated in **Table 6**. Occupied housing units include the year-round residences on Shelter Island which are estimated to have increased from 990 residences in 2000 to 1,123 residences in 2010 and finally 1,375 residences in 2020. The vast majority of housing units classified as “vacant” are seasonal residences, with the remaining vacant homes being unoccupied or currently being offered for sale. The number of vacant housing units also increased between 2000 and 2020 from approximately 1,349 residences to over 2,000 residences in 2020. The total percent growth in total housing units was 16% between 2000 and 2010 and 27% between 2010 and 2020, indicating significant growth and residential construction.

Table 6
Number of Housing Units

Type of Housing Unit	2000	2010	2020
Total Occupied Housing Units (Households)	990	1,123	1,375
Total Vacant Housing Units (includes seasonal homes)	1,349	1,596	2,080
Total Housing Units	2,339	2,719	3,455

It is anticipated that the vast majority of this new residential construction was single-family homes because it is estimated that over 95% of the homes on Shelter Island are single-family detached homes. This trend has stayed consistent for the 20 years analyzed and likely much longer.

The Draft 2020 Comprehensive Plan Update analyzed building permit data to observe the trends in construction. The building permit data showed a building boom in 2005 and 2006 followed by a dip in construction after the Great Recession, and a relatively consistent but modestly increasing level of construction from 2014. The number of new construction single-family houses represents a small percentage of the overall housing numbers. The Draft Update notes that over the 15 years analyzed, there were 106 demolitions.

The longer-term trends in the age of the housing stock are shown in **Table 7**. A significant number of homes on Shelter Island were constructed prior to 1940 (over 700). A surge in housing construction occurred during 2000 and 2009. The number of housing units constructed in 2010 or later is quite small.

Table 7
Year Structure Built

Year Structure Built	# of Housing Units
Built 2014 or later	30
Built 2010 to 2013	51
Built 2000 to 2009	646
Built 1990 to 1999	295
Built 1980 to 1989	408
Built 1970 to 1979	399
Built 1960 to 1969	503
Built 1950 to 1959	361
Built 1940 to 1949	24
Built 1939 or earlier	738
Total	3,455

Housing Tenure

Housing tenure refers to the ownership or rental structure of housing units. Housing tenure trends on Shelter Island have remained fairly consistent over time. There are significantly more year-round owner-occupied housing units than year-round renter-occupied housing units. The percentage of the total housing stock that is year-round owner-occupied ranged from 32% to 37% between 2000 and 2010. The percentage of renter-occupied units has consistently been low (under 10%) and continued to decline to an estimated 3% in 2020. Over half of the total housing stock is comprised of seasonal homes. The remaining residences in the “Other” category in **Table 8** consist primary of homes that are vacant year-round and homes that are being offered for sale and range between 2% and 6% of the housing stock, depending on the year.

Table 8
Housing Tenure Trends

Housing Tenure	2000 (%)	2010 (%)	2020 (%)
Year-Round Owner-Occupied	36%	32%	37%
Year-Round Renter-Occupied	7%	9%	3%
Seasonal Homes	56%	53%	56%
Other	2%	6%	4%

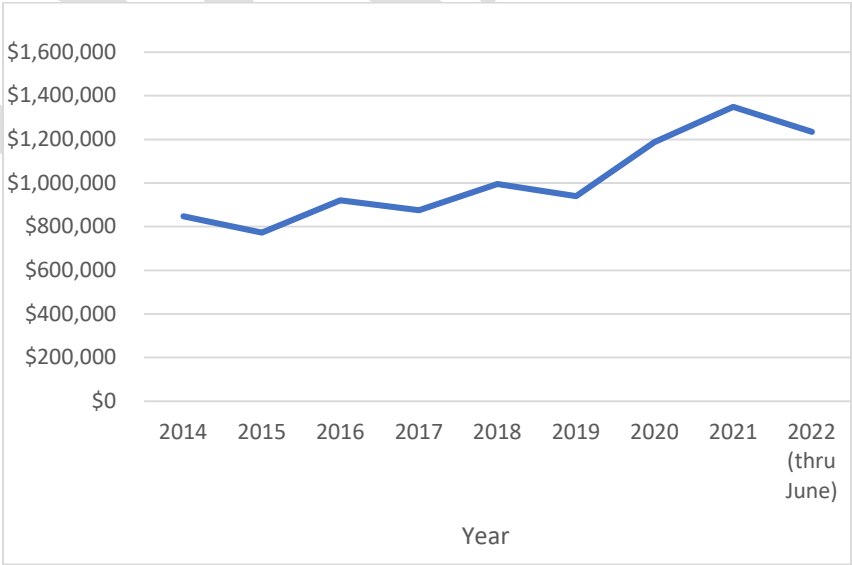
Housing Prices

The median housing value for residences was obtained from the Town of Shelter Island Assessor for the years 2014 through June of 2022. As shown in **Table 9** and **Graph 4**, the median house price has been trending upwards over time, with even larger increases in sales prices in 2020, 2021, and 2022, likely due to the increased demand for housing during the height of the Covid-19 pandemic. The median home price peaked in 2021 at \$1,350,000. The number of real estate transfers in 2020 and 2021 was also significantly higher than the trends observed in previous years. The number of sales in 2022 as of June was significantly lower than the previous years, but the sales prices have remained at the heightened levels.

Table 9
Housing Sales by Year

Year	Number of Real Estate Transfers by Year (Non-Vacant)	Median Sales Price (Non-Vacant Residential)
2014	70	\$847,500
2015	72	\$772,500
2016	86	\$920,000
2017	82	\$875,000
2018	42	\$995,000
2019	67	\$940,000
2020	120	\$1,187,500
2021	119	\$1,350,000
2022 (through June)	18	\$1,235,000

Graph 4
Median Sales Price of Residential Real Estate Transfers



Monthly rental rates are increasing over time as well, as shown in **Table 10**. In 2000, rentals were available at a variety of price points, with the majority of rentals in the \$500-\$999 range. By 2010, there was still a variety of price points available; however, the majority of rentals were in the range of \$1,000 to \$1,499. By 2020, there was less variety in price and it is estimated that all rental units cost at least \$1,500 or more per month.

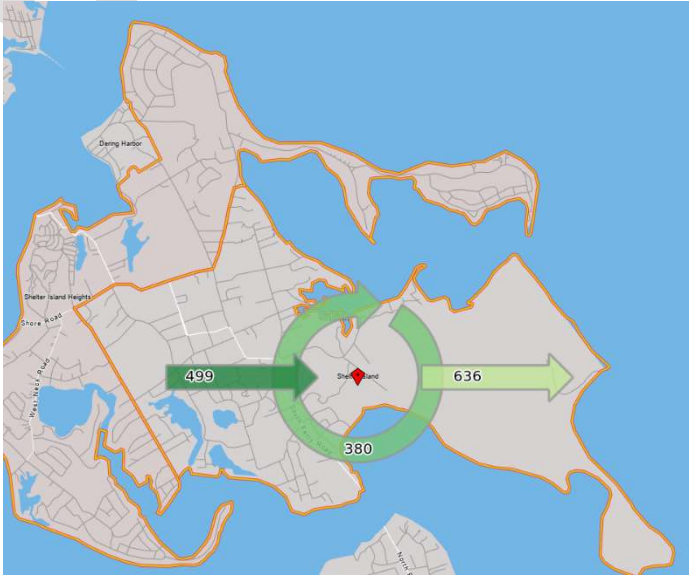
Table 10
Renter-Occupied Housing Units by Gross Rent

Rent	Number of Renters by Year		
	2000	2010	2020
Less than \$500	5	0	0
\$500 - \$999	105	10	0
\$1,000 - \$1,499	17	58	0
\$1,500 or more	5	31	102
No Data or No Rent Paid	25	13	0

According to a search of One Key Multiple Listing Service (MLS) in September of 2022, twelve homes were available for sale in the Town of Shelter Island. Listing prices ranged in price from \$975,000 to \$9,750,000. The \$9.7 million home may be an anomaly as all other homes were listed under \$2.7 million. The median listing price of currently available homes is \$1,985,000 and the average is \$2,492,750. Only three rental units were listed; two of which were offered as short-term rentals.

Shelter Island Jobs Analysis

The United States Census Bureau hosts the “On the Map” tool which allows for detailed analysis of commuting characteristics. An inflow/outflow analysis was performed for the combined area of the Shelter Island and Shelter Island Heights CDPs, which shows the relationship between employees on Shelter Island and their location of residence. The analysis used 2019 data as that was the most recent information available and includes all types of jobs. The results of this analysis are shown to the right. It was estimated that 499 employees of businesses on Shelter Island reside off-Island and 636 Shelter Island residents travel off-Island to work. An estimated additional 380 residents both work and live on Shelter Island.



As discussed in the Draft 2020 Comprehensive Plan Update, the employment base of Shelter Island has largely shifted to tourism-related industries and services for the seasonal market. Accommodations and food service and arts, entertainment, and recreation account for 23 percent of businesses and 31 percent of employees. Businesses in the accommodation, food service, and retail trade industries often employ non-residents because the incomes generated by these positions are not high enough to afford living on Shelter Island. Real estate and construction are also important sectors that generate significant economic activity.

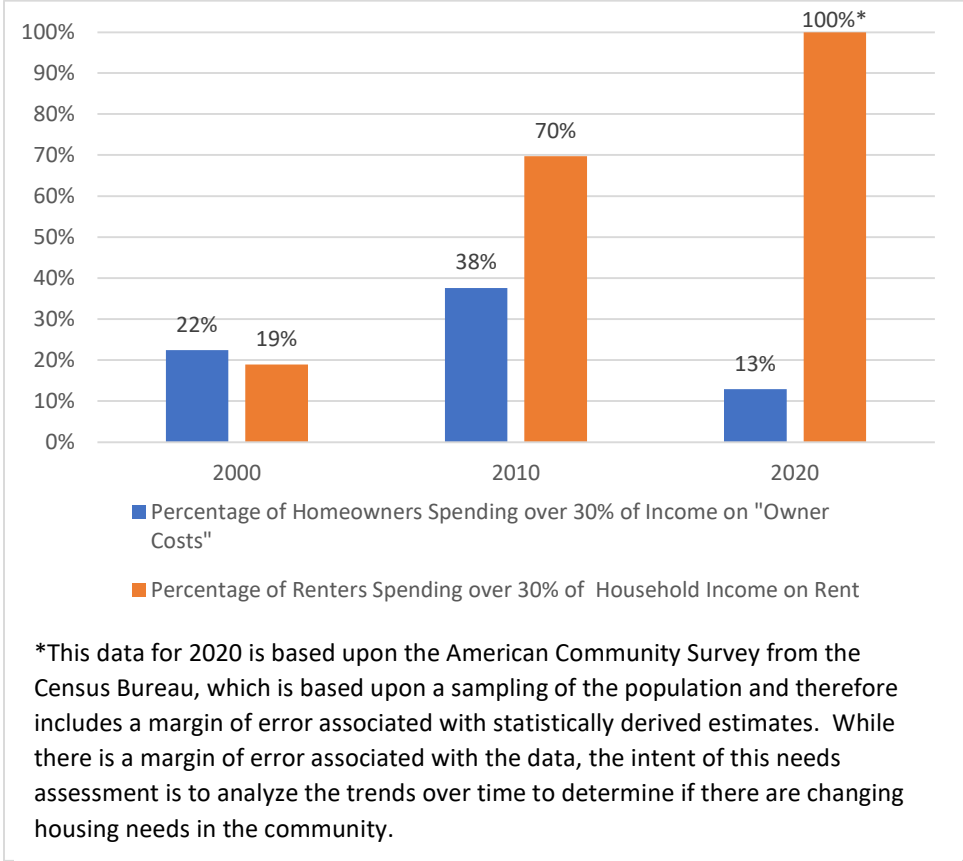
The Draft 2020 Comprehensive Plan Update also discussed commuting characteristics of the Island and found that many businesses on Shelter Island have employees who commute to work from off-Island, and many Island residents work on the mainland. Although the year-round population of Shelter Island has increased, the labor force living on the Island shrank between 2010 and 2018, according to ACS estimated data, which is the only data available and lists that the lack of sufficient workforce housing may be a contributing factor. Finally, the Draft Update noted that many working-age year-round residents and households have multiple jobs in order to allow them to afford to live on Shelter Island.

Cost Burdened Analysis

The US Department of Housing and Urban Development (HUD) defines housing cost burden as the percentage of household income required to pay for rent or ownership costs. A household is considered housing cost burdened if more than 30% of their income is spent on rent or ownership costs.

A review of the percentage of households spending more than 30% of their income on gross rent or ownership costs is shown in **Graph 5***. In 2000, the percentage of owner-occupied and renter-occupied households spending over 30% of their income on housing costs was similar, at approximately 20% of households. By 2010, a gap began to emerge where renters were more likely to be cost-burdened than homeowners. In 2010, it is estimated that 70% of renters were cost-burdened and 38% of homeowners were cost-burdened. By 2020, this disparity had increased even further, with an estimated 100% of renters being cost-burdened with respect to housing, while only 13% of homeowners were cost-burdened.

Graph 5
Percent of Households with Housing Costs Greater than 30% of Income



Affordable Housing Gap Analysis

As noted previously, the median 2020 housing value for the Town of Shelter Island was \$1,187,500 according to Town of Shelter Island Tax Assessor data. To determine the affordable sales gap within the Town, certain assumptions were made on the mortgage and underwriting criteria. The calculation, for the purposes of this needs assessment, assumed a standard mortgage with the current interest rate for a 30-year, fixed-rate mortgage of 5.0%. The underwriting also assumes a 5% down payment and a housing debt-to-income ratio of 36%, which is the maximum allowed under a standard Fannie Mae mortgage. For purposes of this analysis, the tax rate of \$6.2942 per \$1,000 of home value as published by the Town of Shelter Island was utilized.

Utilizing the criteria listed above, a homebuyer would need an annual income of approximately \$222,629 to purchase a \$1,187,500 home as shown in **Table 11**. A household earning the median income of \$114,082 in the Town would have a gap of \$108,547 in annual income. Note that this calculation does not consider closing costs or private mortgage insurance.

Finally, the calculations assume 36% debt-to-income ratio, which is on the high side, where a 28% debt-to-income ratio is generally recommended. By using a lower debt-to-income ratio, the minimum income needed to afford the purchase of the median sales price home would increase. Regardless, based on the

median income on Shelter Island, most residents would not be able to purchase a home selling at the current median housing value.

Table 11
Homeownership Affordability Gap

Parameter	Input Value	Dollars
Shelter Island Median Home Price		\$1,187,500
Mortgage Rate - 30 year Fixed	5.0%	-
Down payment 5 percent	5.0%	\$59,375
Per \$1,000 tax rate	6.2942	\$7,474
Amount Mortgaged		\$1,128,125
Monthly Mortgage payments		\$6,056
Monthly Tax payments		\$623
Monthly housing payments (mortgage and taxes combined)		\$6,679
Housing Debt to income (DTI ratio)	0.36	\$18,552
Yearly Income Required		\$222,629
SI Median Household Income (2020)		\$114,082
Yearly Income Deficit		\$108,547

Needs Assessment Conclusion

In conclusion, the overall population on Shelter Island is increasing. The age distribution of the Island is changing as well, resulting in a growing senior population and decreasing young population. School district data and Census data both support the conclusion that the trend is of population decline among young families.

The number of housing units is increasing, but these units are primarily owner-occupied single-family homes or seasonal homes. These types of units are expensive and typically not attainable for many segments of the population, such as single adults or young families. Home prices have been increasing over time and the increases in price have been exacerbated by the Covid-19 pandemic. Based on a housing affordability gap analysis, the median selling price of a home on Shelter Island is not financially attainable for households earning the median income on Shelter Island. In fact, households need to earn nearly double the median income in order to afford a house listed at the median selling price on Shelter Island.

There are very few renter-occupied, year-round housing units available on Shelter Island, and the number of this type of housing is continuing to decline. Competition for year-round rental housing will remain high as there are limited housing units overall, and very limited vacant housing units, which contribute to increased rental rates as demonstrated by the data. Based on a cost burden analysis, which defines “cost burdened” as households spending more than 30% of their income on housing, the percentage of renters that are cost-burdened has been escalating over time. The estimates for 2020 indicate the all renters are currently cost-burdened, while the percentage of homeowners who are cost-burdened has been decreasing over time.

The need for less expensive housing units on Shelter Island has been documented in other planning documents, including the 1994 Comprehensive Plan which reported that only 6% of residents could afford a house costing the median home value in 1994. Goals and objectives in 1994 included creating and maintaining “affordable housing opportunities for the diversity of age and income groups that make up Shelter Island’s year-round population.” The plan identified young working households, first-time homebuyers, and elders as groups that could benefit from less expensive housing. The data compiled and analyzed for this needs assessment provide support that these trends in housing costs and increasing unaffordability have continued through 2020 and there is still a need for more affordable and diverse housing options.

It is challenging to identify exactly how many units of community housing are required to serve the year-round Shelter Island population. This is partially because former residents who had a need for community housing may have already moved off-Island due to unavailability of such housing and therefore are not included in the available statistics. It is noted that the Draft 2020 Comprehensive Plan update estimated that 20-40 affordable rental and purchases units were needed. A valuable tool to understanding the more specific, current needs for community housing would be to update the Shelter Island Community Housing Registry with a robust outreach effort to more accurately quantify the population of interested residents and former residents who recently moved off-Island.

DRAFT

APPENDIX B

Summary of Results from the Public Questionnaire

Town of Shelter Island
Community Housing Open House/On-line Questionnaire Summary of Input

I am a(an)...	
Individual Seeking Housing	12.60%
Interested Citizen	83.60%
Business Owner/Employer	3.80%

Who do you know who is most in need of community housing	
Younger Population	64.90%
Families	60.10%
Seniors	28.40%

Do you know anyone who moved off Shelter Island because of lack of housing options?	
Yes	56%
No	45%

Do you know anyone who commutes to Shelter Island while working full-time year-round on the Island?	
Yes	70%
No	30%

What types of housing do you think this community needs?	
For sale	53.60%
For rent	79.70%
Seniors	41.80%

Town of Shelter Island
Community Housing Open House/On-line Questionnaire Summary of Input

Fund Uses	
Purchase land to be developed for community housing	
Good fit	70%
Less appropriate	7%
Inappropriate	16%
I'm not sure	6%
Soft Costs (planning, engineering, design) associated with the creation of community housing	
Good fit	73%
Less appropriate	6%
Inappropriate	15%
I'm not sure	6%
Construction of housing for sale by the Town	
Good fit	42%
Less appropriate	17%
Inappropriate	33%
I'm not sure	8%
Construction of housing for rent by the Town	
Good fit	66%
Less appropriate	11%
Inappropriate	18%
I'm not sure	5%
Construction of housing for sale through a private/public partnership	
Good fit	42%
Less appropriate	21%
Inappropriate	28%
I'm not sure	9%
Construction of housing for rent through a private/public partnership	
Good fit	59%
Less appropriate	19%
Inappropriate	15%
I'm not sure	6%
Rehabilitation of existing buildings to be used for community housing	
Good fit	78%
Less appropriate	7%
Inappropriate	8%
I'm not sure	6%
Maintenance of housing for rent by the Town	
Good fit	47%
Less appropriate	23%
Inappropriate	22%
I'm not sure	8%
Maintenance of housing for rent by a public/private partnership	
Good fit	47%
Less appropriate	21%
Inappropriate	21%
I'm not sure	11%
First-time homebuyer assistance programs	
Good fit	56%
Less appropriate	17%
Inappropriate	20%
I'm not sure	7%
Direct homeowner assistance programs	
Good fit	43%
Less appropriate	24%
Inappropriate	21%
I'm not sure	13%
Housing counseling services provided by a not-for-profit	
Good fit	61%
Less appropriate	17%
Inappropriate	11%
I'm not sure	10%

Town of Shelter Island
Community Housing Open House/On-line Questionnaire Summary of Input

I think community housing on shelter island should include...	
Single Family Homes	
strongly disagree	21%
disagree	9%
neutral	9%
agree	27%
strongly agree	34%
Accessory Dwelling Units	
strongly disagree	15%
disagree	5%
neutral	17%
agree	21%
strongly agree	41%
Cottage Communities/Pocket Neighborhoods	
strongly disagree	16%
disagree	7%
neutral	13%
agree	25%
strongly agree	38%
Two Family Homes	
strongly disagree	18%
disagree	10%
neutral	10%
agree	24%
strongly agree	37%
Manor House Apartments	
strongly disagree	19%
disagree	7%
neutral	20%
agree	20%
strongly agree	35%
Apartments Above Stores/Offices	
strongly disagree	12%
disagree	3%
neutral	10%
agree	30%
strongly agree	46%
Senior Communities	
strongly disagree	11%
disagree	9%
neutral	21%
agree	26%
strongly agree	33%

Town of Shelter Island
Community Housing Open House/On-line Questionnaire Summary of Input

Where on Shelter Island should the following housing types be located?	
single family homes	
center of town	8%
114 corridor	11%
scattered throughout town	81%
accessory dwelling units	
center of town	8%
114 corridor	10%
scattered throughout town	83%
cottage communities/pocket neighborhoods	
center of town	19%
114 corridor	19%
scattered throughout town	62%
two family homes	
center of town	14%
114 corridor	19%
scattered throughout town	66%
manor house apartments	
center of town	23%
114 corridor	21%
scattered throughout town	56%
apartments above stores/offices	
center of town	30%
114 corridor	29%
scattered throughout town	41%
senior communities	
center of town	24%
114 corridor	18%
scattered throughout town	58%

How do you live?	
Alone	14.90%
With a partner	31.80%
Family	45.90%
Roommates	4.10%

What would be your preferred housing situation?	
Ownership	71.70%
Rental	24.60%
Accessory Dwelling Unit	10.90%
Senior community	13.80%
Employer provided housing	2.90%

If you were to seek community housing, how many bedrooms would address this need for you	
Studio	3.30%
One-bedroom	21.70%
Two-bedroom	38.30%
Three-bedroom	18.30%
4+ Bedroom	5.80%

What services would it be important for you to be within walking distance?	
School	40.20%
Library	40.20%
The IGA	72.00%
None	2.80%