



THE VIABILITY OF CENTRAL VIRGINIA'S MANUFACTURED HOUSING COMMUNITIES

Census + Housing Survey Findings

Field Research

Preliminary Assumptions

Photos



STUDY AREA

Richmond Metropolitan Statistical Area

Data sources:

- ✓ 2013 American Housing Survey
- ✓ 2010-2014 American Community Survey
- ✓ 2010 Census

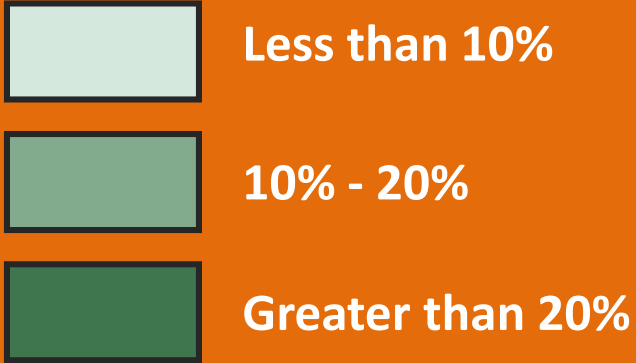


RESEARCH APPROACH

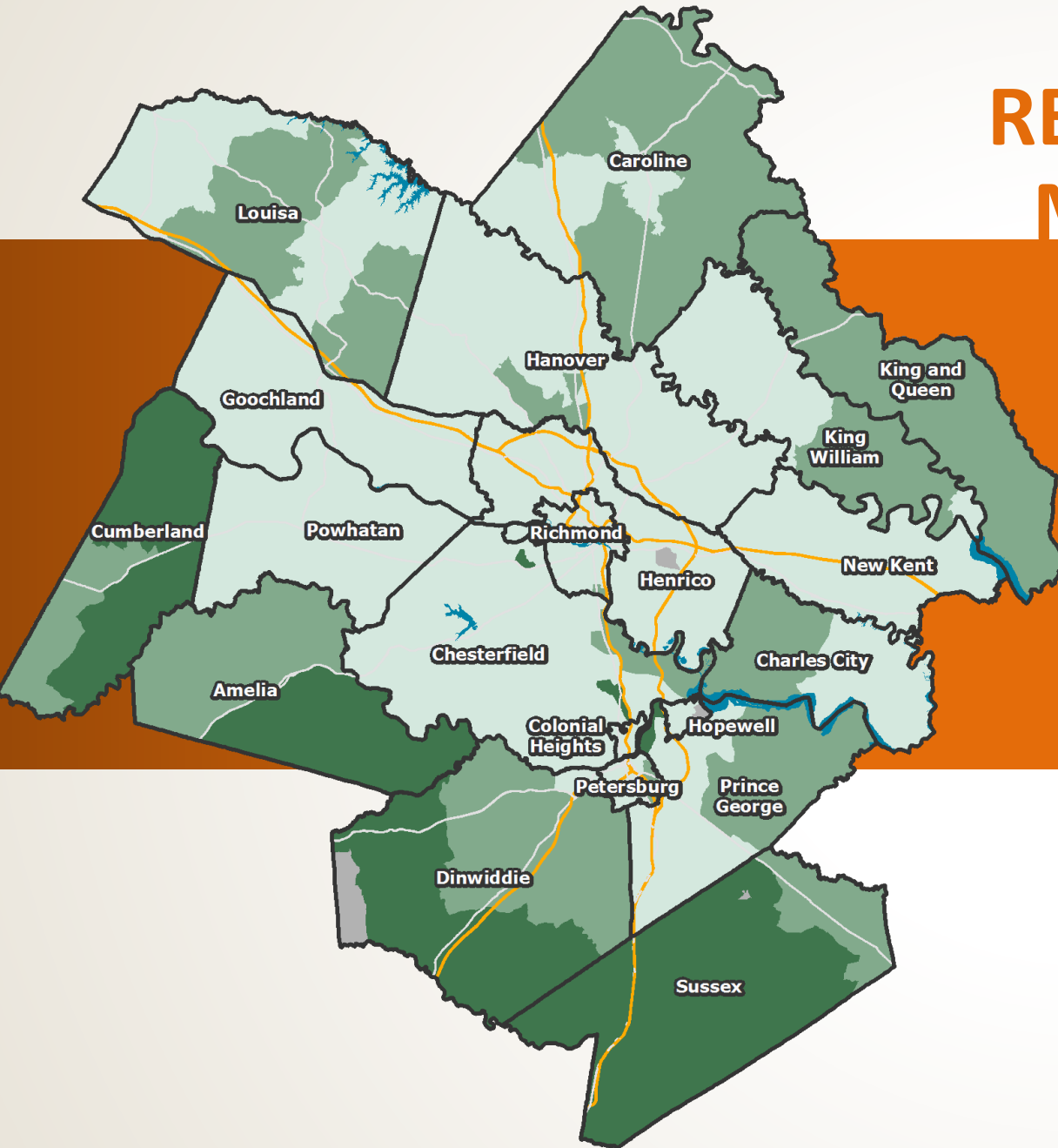
- ✓ Disaggregated census data with MH home owners as group
- ✓ Windshield surveys of 54 parks
- ✓ Park management interviews
- ✓ Local government questionnaires
- ✓ Interviews with advocacy organizations
- ✓ Interviews with resident representatives
- ✓ Literature review of industry reports

REGIONAL DISTRIBUTION OF MANUFACTURED HOUSING

Pct. Manufactured Housing (By Tract)



13,200 occupied MH units in Richmond MSA
45,900 people living in MH in Richmond MSA
4,735 units in **61** MH communities
11,437 people living in MH communities



2013 AMERICAN HOUSING SURVEY

Data for all MH in Richmond MSA



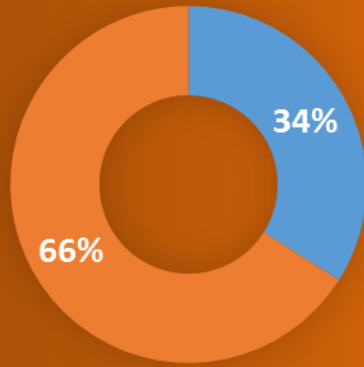
PARK SIZE

75% of MH are singular or in groups of 6 or less

21% of MH are in groups over 20 units (i.e., parks)

RESIDENTS

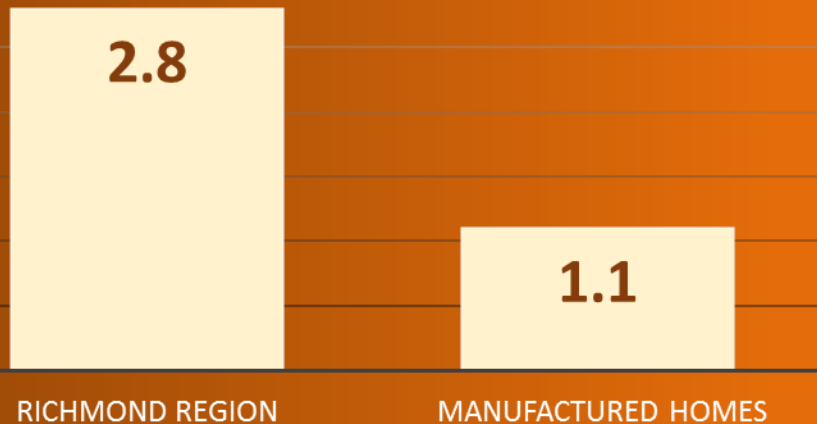
Homes with Persons 65 Years or Older



- ✓ 65% of MH have children under 18
- ✓ 66% of MH have senior citizens
- ✓ 68% of MH house multiple families

VALUE TO INCOME

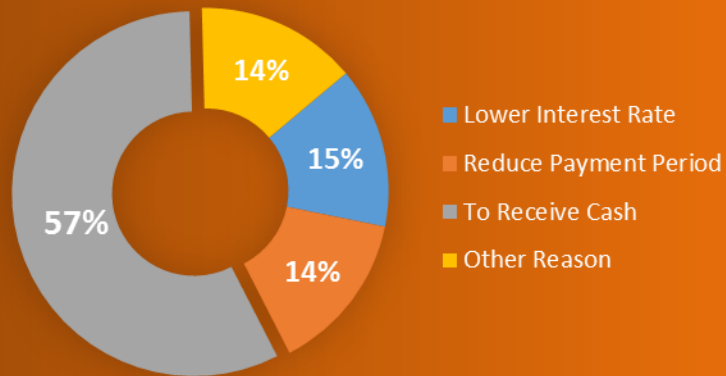
Median Home Value to Income Ratio



- ✓ The median value to income ratio is **39%** lower for Manufactured Home owners than for the region as a whole.
- ✓ **42%** of manufactured homes are valued at \$19,000 or less.

REFINANCING MORTGAGES

Primary Reason For Refinancing Mortgage



- ✓ Over 20% of MH owners are paying more than 8% interest on mortgage* loan
- ✓ Primary Reason for Refinancing Mortgage:

MH Owners: To Receive Cash: (57%)

Region: To Get a Lower Interest Rate: (60%)

* "Mortgage" may refer to other types of loans (i.e., personal property). AHS definition is unclear.

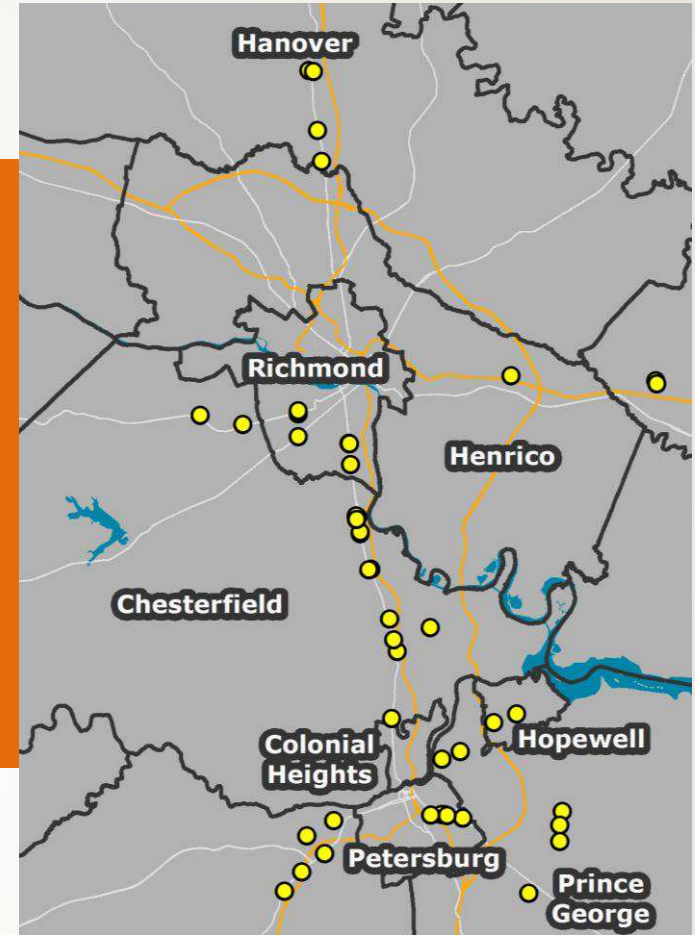
FIELD RESEARCH

MH park windshield surveys

May – July 2016

FIELD RESEARCH

- ✓ 54 parks examined
- ✓ Design Features
- ✓ Housing Conditions
- ✓ Park Services
- ✓ Connectivity



		LOUISA				CAROLINE
		<i>Buckner MHP</i>	<i>Larry Lamb MHP</i>	<i>Mineral Trailer Park</i>	<i>Six-O-Five Village</i>	<i>Cedar Ridge</i>
	# of Units	12	12	34	104	
DESIGN FEATURES	CODE					
Formal park entrance	0 = None, 1 = Poor, 2 = Adequate, 3 = Good	0	1	3	2	
Curb, gutter, sewer	0 = None, 1 = Poor, 2 = Adequate, 3 = Good	0	0	0	0	
Road/driveway condition	0 = None, 1 = Poor, 2 = Adequate, 3 = Good	1	1	2	2	
Road/driveway width	0 = None, 1 = Poor, 2 = Adequate, 3 = Good	1	1	0	1	
Sidewalk	0 = None, 1 = Poor, 2 = Adequate, 3 = Good					0
Street trees	0 = None, 1 = Poor, 2 = Adequate, 3 = Good					0
Dedicated resident parking	0 = None, 1 = Poor, 2 = Adequate, 3 = Good					1
Street signs	0 = None, 1 = Poor, 2 = Adequate, 3 = Good	0	0	0	1	
Speed limit signs	0 = None, 1 = Poor, 2 = Adequate, 3 = Good	0	2	2	1	
Stop signs	0 = None, 1 = Poor, 2 = Adequate, 3 = Good	0	0	0	0	
Other courtesy signs	0 = None, 1 = Poor, 2 = Adequate, 3 = Good	0	0	0	0	
Fencing	0 = None, 1 = Poor, 2 = Adequate, 3 = Good	0	0	0	0	
Street lighting	0 = None, 1 = Poor, 2 = Adequate, 3 = Good	0	0	1	1	
Street layout		Loop	One dead-end street	Cul-de-sacs	Modified grid	
DESIGN SCORE		2	7	13	9	
(Out of 39)		5%	18%	33%	23%	
median score	11					
HOUSING CONDITIONS						
Average age of units	0 = >30 years, 1 = 10-30 years, 2 = <10 years	0	0	0	0	
Double-wide	0 = None, 1 = Few, 2 = Some, 3 = Most	0	0	0	0	
Permanent foundations	0 = None, 1 = Few, 2 = Some, 3 = Most	0	0	1	0	
Covered hitches	0 = None, 1 = Few, 2 = Some, 3 = Most	1	2	2	1	
Foundation skirts	0 = None, 1 = Few, 2 = Some, 3 = Most	3	3	3	3	
Large porches/decks	0 = None, 1 = Few, 2 = Some, 3 = Most	1	1	1	0	
Screened-in porches	0 = None, 1 = Few, 2 = Some, 3 = Most	0	0	0	0	
Lawn/landscape maintenance	0 = Poor, 1 = Adequate, 2 = Good	0	1	0	0	

Park “checklist”



Green Acres MHP, Dinwiddie County

DESIGN FEATURES

- ✓ 80% of parks have no curb, gutter, or sewer
- ✓ Only 2 parks have sidewalks
- ✓ 20% of parks have no public lighting
- ✓ 26% of parks have roads and/or driveways rated as “Poor”



Tom Ford's, City of Richmond

HOUSING CONDITIONS

- ✓ 35% of parks display units with “Poor” exterior siding
- ✓ 9% of parks display uncontained refuse from street
- ✓ 15% of parks have some units with permanent foundations
- ✓ Nearly 50% of parks have a significant number of units that are pre 1976 HUD certified, or over 40 years old



Sedgefield MHP, Hanover County

PARK SERVICES

- ✓ **87%** of parks do not have any recreational areas
- ✓ **Over half** of parks do not have on-site management office
- ✓ **80%** of parks have recreational facilities rated as “Poor,” or none at all
- ✓ **Over 50%** of parks have no fire hydrants



Marsh Drive, Goochland County

CONNECTIVITY

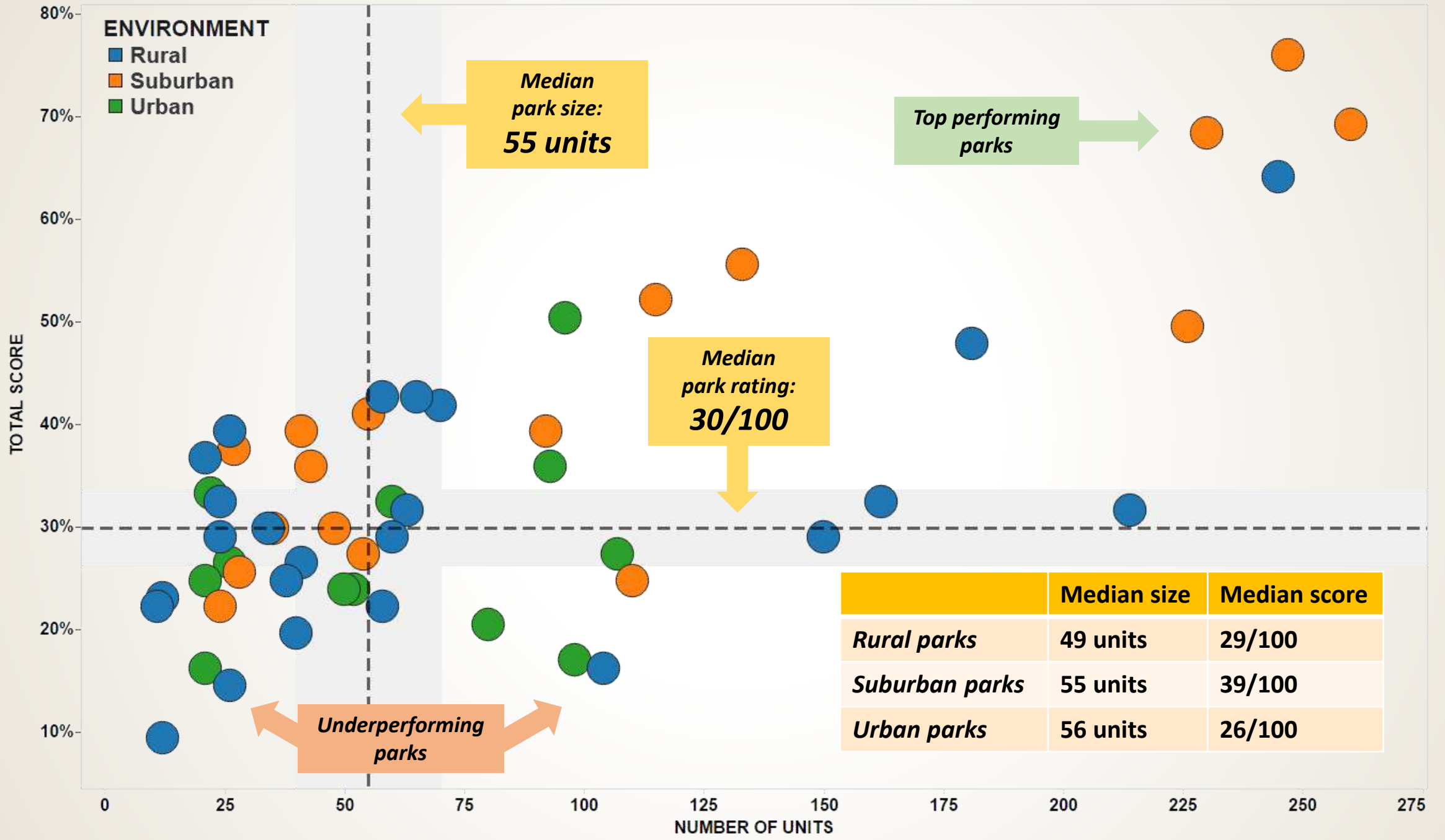
- ✓ 65% of parks are located over ½ mile from a grocery store, or other meaningful retail.
- ✓ 74% of parks are located over ½ mile from a public transit stop.



El Rancho Trailer Court, Chesterfield County

PRELIMINARY CONCLUSIONS

- 1) Park size correlates positively with overall park quality. (*See next slide*)
- 2) Park “types” vary widely in the region.
- 3) Most MH are solitary, or in small groups.



	Median size	Median score
<i>Rural parks</i>	49 units	29/100
<i>Suburban parks</i>	55 units	39/100
<i>Urban parks</i>	56 units	26/100



Ponderosa MHP, Chesterfield County

PRELIMINARY CONCLUSIONS

- 4) More than half of all MH in region are occupied by multiple generations or families.
- 5) Most MH parks are under-managed.
- 6) Local government policy varies.
- 7) Suburban parks are in better condition than rural or urban parks.



PRELIMINARY PARK TYPOLOGIES

1) Top Performer

- ✓ amenity rich
- ✓ newer units
- ✓ good management



PRELIMINARY PARK TYPOLOGIES

2) Traditional Suburban

- ✓ car dependent
- ✓ medium density
- ✓ large

PRELIMINARY PARK TYPOLOGIES



3) Rural Enclave

- ✓ low density
- ✓ few units
- ✓ no management

PRELIMINARY PARK TYPOLOGIES

4) Under Pressure

- ✓ Dense
- ✓ Poor conditions / code enforcement
- ✓ Many families
- ✓ Commercial corridors
- ✓ Redevelopment pressure



PRELIMINARY PARK TYPOLOGIES

5) Obsolete

- ✓ declining population
- ✓ lack of infrastructure
- ✓ extreme poverty



PRELIMINARY PARK TYPOLOGIES



6) Transitional

- ✓ mix of old & new homes
- ✓ active management
- ✓ presence of conventional suburban subdivision design



Sunset MHP, City of Petersburg

RECOMMENDATION CATEGORIES

- 1) Financing
- 2) Management
- 3) Land use policy & code enforcement
- 4) Community planning
- 5) Design improvements

SURVEY EXAMPLES + PHOTOS

Bellwood MHP, Chesterfield County





12

13



Bellwood MHP, Prince George County



Trinity MHP, Dinwiddie County



Bellwood, Chesterfield County



Palm Leaf Park, Hanover County



Conner Homes, Chesterfield County

Top Performers

Sedgefield MHP, Hanover County





Sedgefield, Hanover County





Glen Meadows, Caroline County



233 234									
00	01	02	03	04	05	06	07	08	09
10	11	12	13	14	15	16	17	18	19
20	21	22	23	24	25	26	27	28	29
30	31	32	33	34	35	36	37	38	39
40	41	42	43	44	45	46	47	48	49
50	51	52	53	54	55	56	57	58	59
60	61	62	63	64	65	66	67	68	69
70	71	72	73	74	75	76	77	78	79
80	81	82	83	84	85	86	87	88	89
90	91	92	93	94	95	96	97	98	99

Green Acres, Dinwiddie County



Colonial Estates, Hanover County



Forest Meadows, Henrico County



Harbor East, Chesterfield County



340

Pine Ridge, Prince George County





PINE RIDGE

Welcome Home! You belong here!







NO PETS
ALLOWED
IN
PLAYGROUND
AREA

WARNING



LOT
61

PRIVATE PROPERTY
NO TRESPASSING
OR SOLICITING
SPEED LIMIT
10 m.p.h.
RESIDENTS &
GUESTS ONLY

NO
THRU
TRAFFIC

Intermediate Performers



Woodford Estates, Caroline County



Kosmo Village, Hanover County



Rockahock Park, New Kent County



Ford's Park, Petersburg



Worsham Park, Richmond



Marsh Drive, Goochland County



Mineral Park, Louisa County



Tucker's Recreational Park,
King and Queen County



220

Bexley Park, Prince George County

Poor Performers



Trinity Park, Dinwiddie County



Fitzgerald Park, Richmond



NO TRESPASSING
NO SOLICITING
PRIVATE
PROPERTY
CHILDREN
PLAYING
5 MPH

Hale's Park, Hopewell



Six-0-Five Park, Louisa County



Sunset Park, Petersburg



Conner Park, Chesterfield County



Oak Shades, Prince George County



Putze's Park, New Kent County



Shady Hill, Chesterfield County



Rudd's Park, Richmond



Tidewater Park, Caroline County



Tidewater Park, Caroline County



Tidewater Park, Caroline County