Housing in Lee's Summit

A Framework for Future Decision -Making

City Council & Planning Commission

Joint Meeting

August 11, 2026

LEE'S SUMMIT
MISSOURI

Yours Truly

- Establish a shared understanding of Lee's Summit's housing landscape
- Understand the forces shaping housing demand and supply
- Clarify the City's role in housing
  - Regulatory environment and housing initiatives
- Acknowledge competing community priorities
- Identify the housing issues and policy questions that may warrant further exploration
- Provide direction for the Mayor's Housing Task Force
  - Framing the problem and setting direction
  - Not "solving" housing in one evening
- Begin identifying where there is, and where there is not, policy consensus
  - Important when recommendations return to the Council

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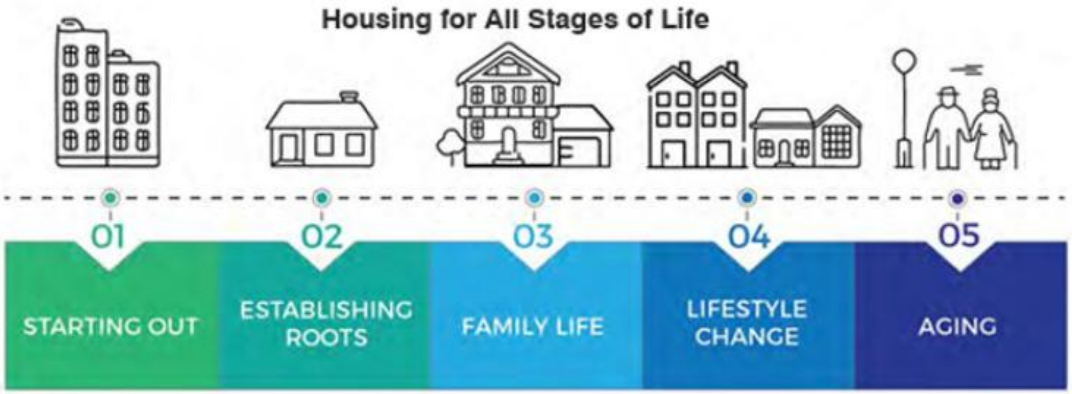
Goals for Work Session

- Establish a common vocabulary
- Distinguish between housing type, tenure, ownership model
- What is “affordable” vs. “attainable”
  - Workforce Housing
  - Naturally Occurring Affordable Housing (NOAH)
  - Area Median Income (AMI)
- Regulatory terminology
- Emerging construction terminology
- Housing Continiuium



Setting the Table

HOUSING TYPOLOGY	POSSIBLE TENURE	POSSIBLE OWNERSHIP MODEL	WHAT IT MEANS
SINGLE-FAMILY DETACHED	Owner or Renter	Fee Simple Ownership, Investor-Owned Rental	A detached home can be owned and lived in, or rented from an owner.
TOWNHOUSE	Owner or Renter	Fee Simple Ownership Condominium Ownership Investor-Owned Rental	Townhomes can be individually owned or rented, and may be structured as fee simple lots or condominiums.
DUPLEX	Owner or Renter	Fee Simple Ownership Condominium Ownership Investor-Owned Rental	A two-unit building can be owned or rented, and may be structured in different ownership models.
APARTMENT (MULTIFAMILY)	Renter	Single-Owner Rental (Investor or Company)	Apartment buildings are typically rental housing owned by one entity.
CONDOMINIUM	Owner *(or Renter if leased)*	Condominium Ownership	Residents own their individual unit and share ownership of common areas through a condo association.
COTTAGE COURT	Owner or Renter	Fee Simple Ownership, Condominium Ownership	Smaller homes arranged around shared open space can be owned or rented and structured in multiple ways.

KEY TAKEAWAY: These three characteristics are independent.
The same physical housing type can support different ways of living in it and different ways of owning it.

Setting the Table

Demographic Profile

101,108 → **112,883** → **120,709**

Population in 2020 | Estimated in 2026 | Projected by 2030

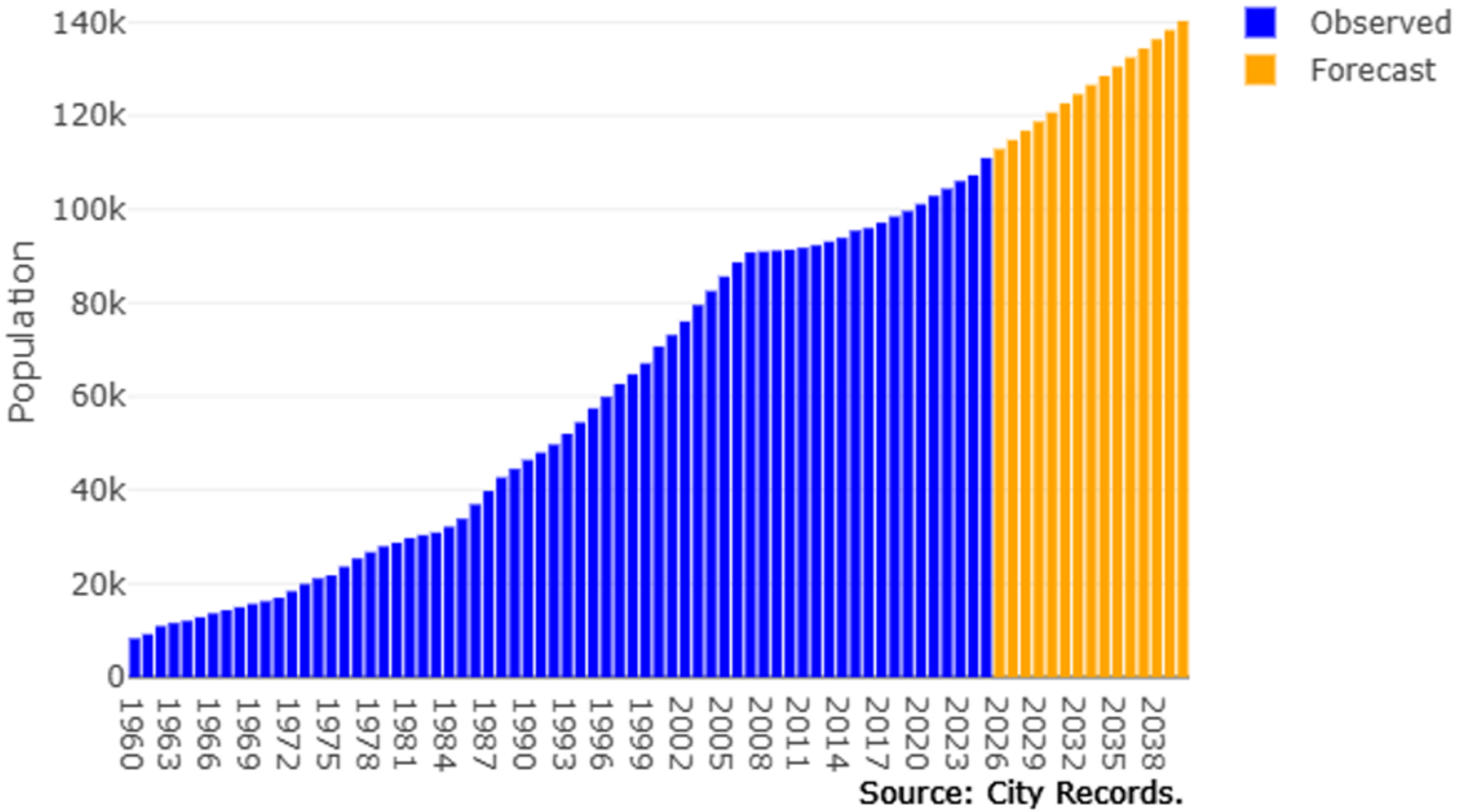
Owner / renter split

Growing and aging at the same time

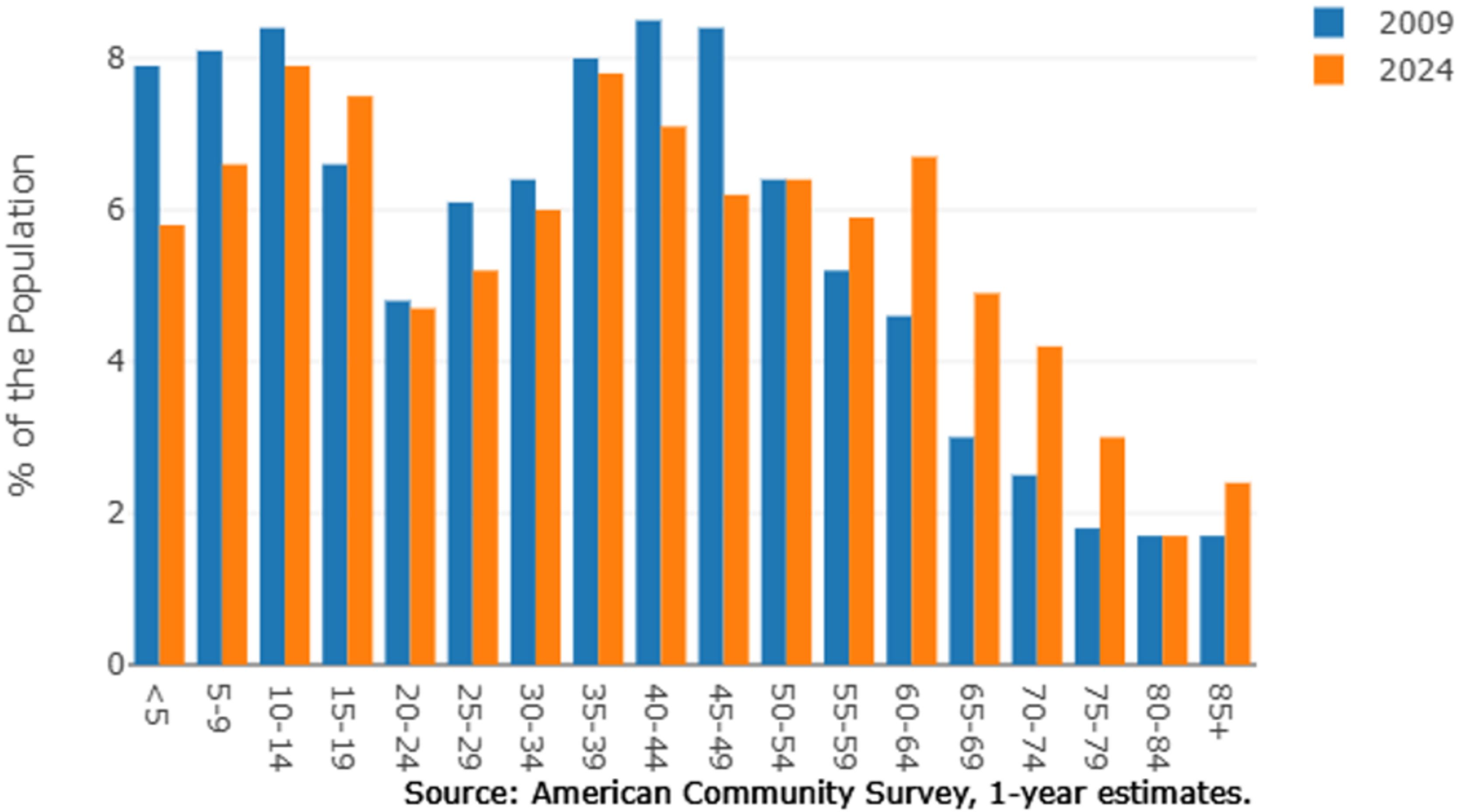
Households are getting smaller, while one- and two-person households are becoming more important

Housing demand is broader than the “young family suburb” model: families, young professionals, empty nesters, seniors, renters, and owners all matter

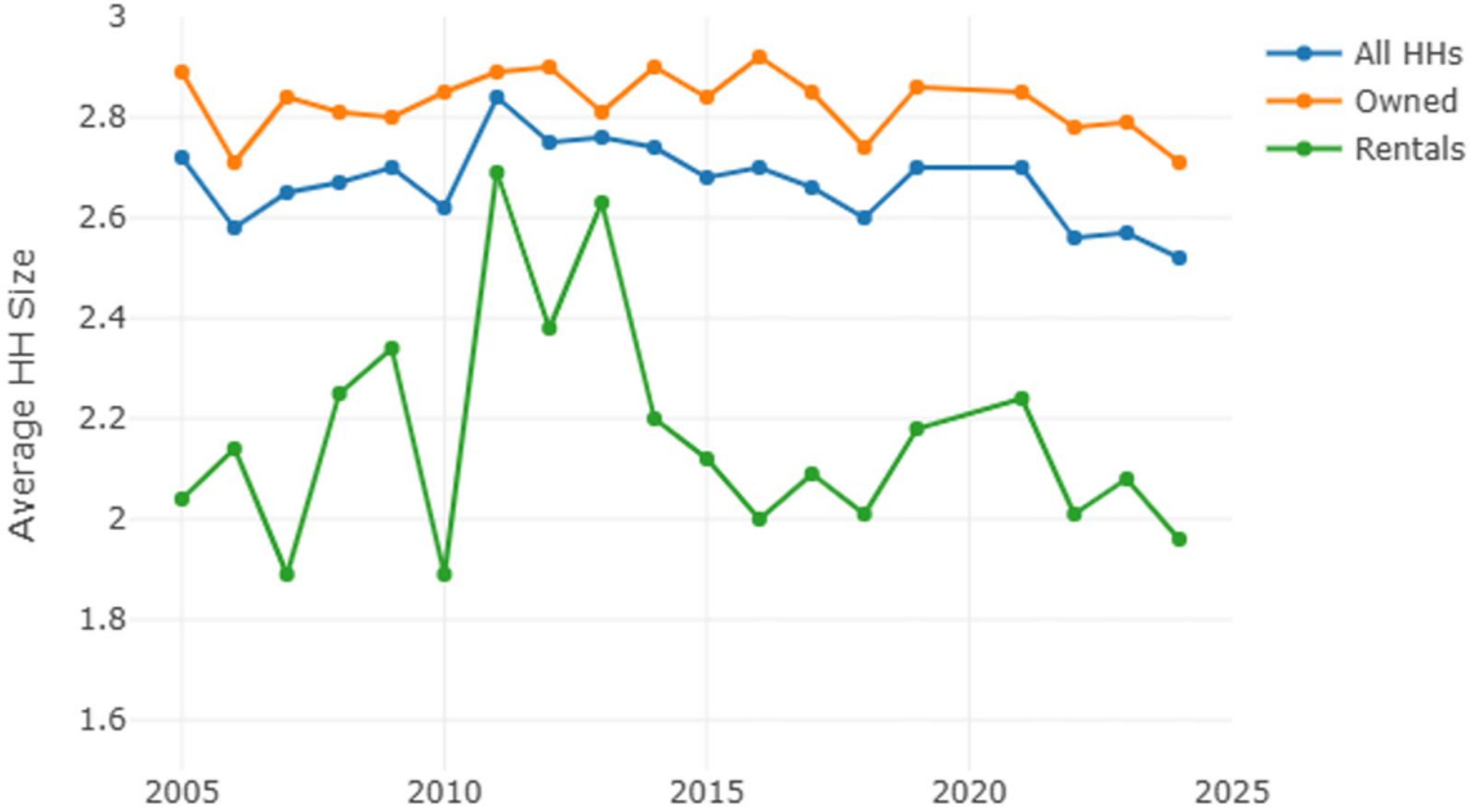
Future housing policy should support more options across life stages, not replace one type of household or housing with another.



Population Growth

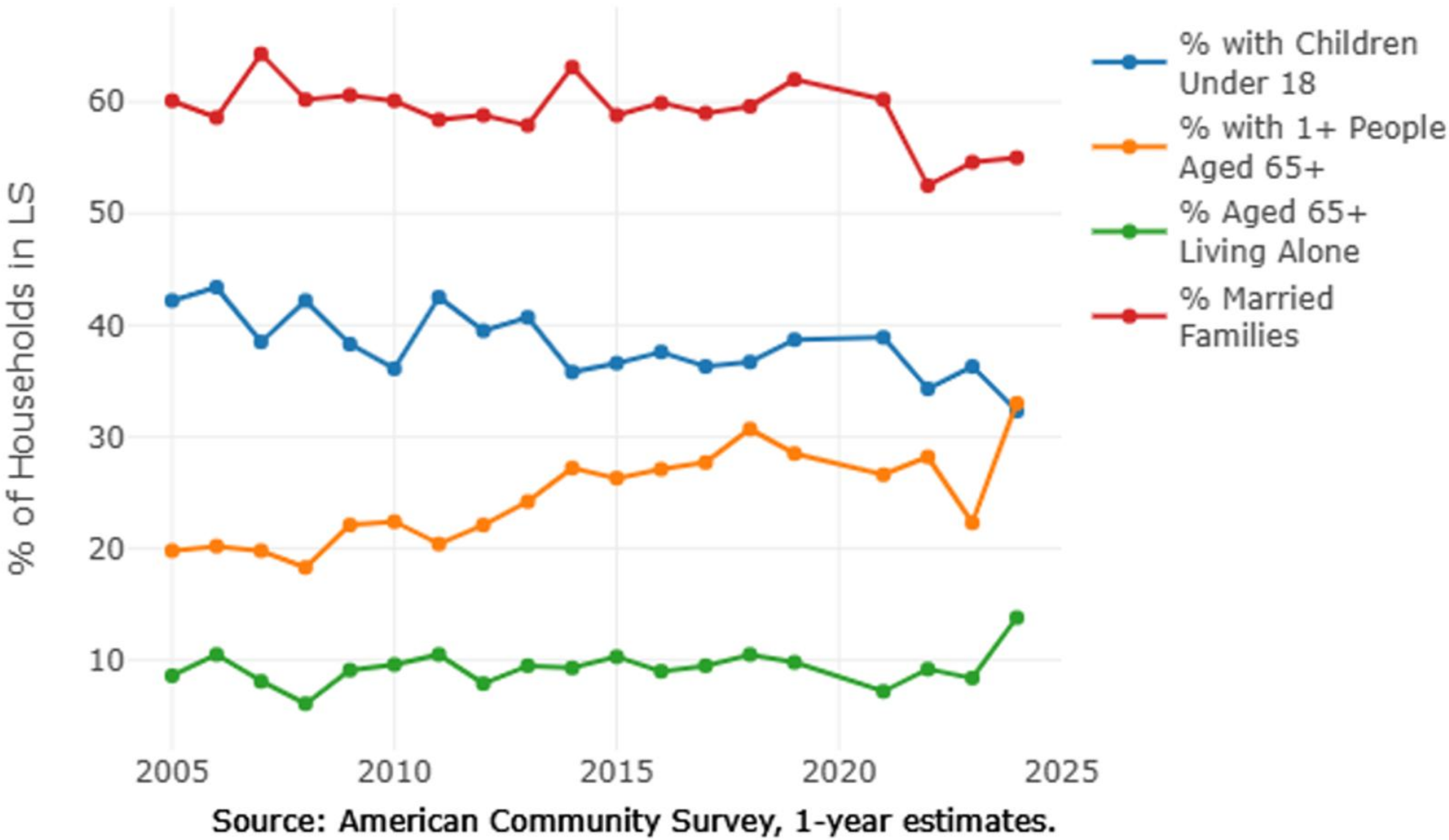


Age Distribution

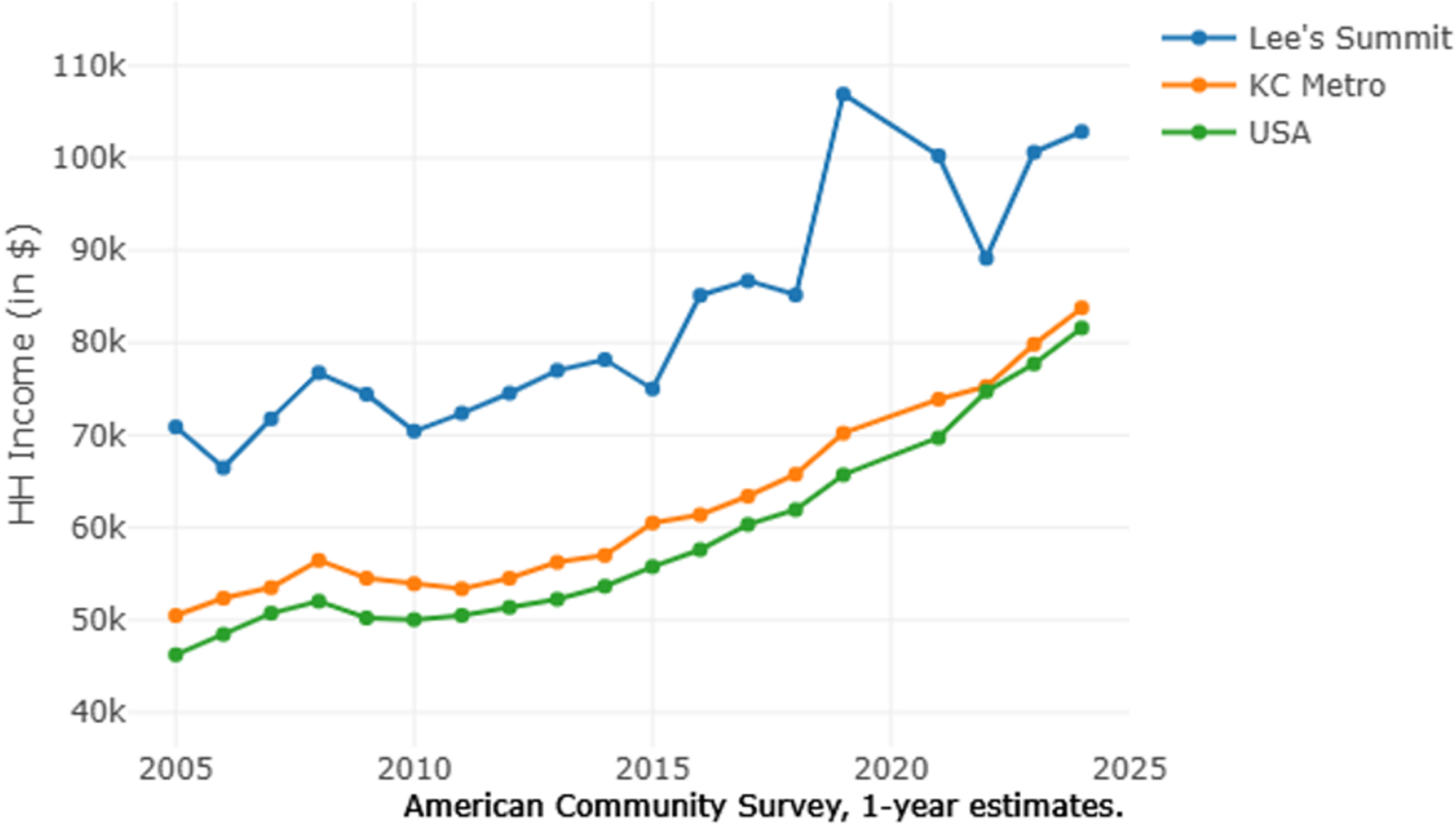


Source: American Community Survey, 1-year estimates.

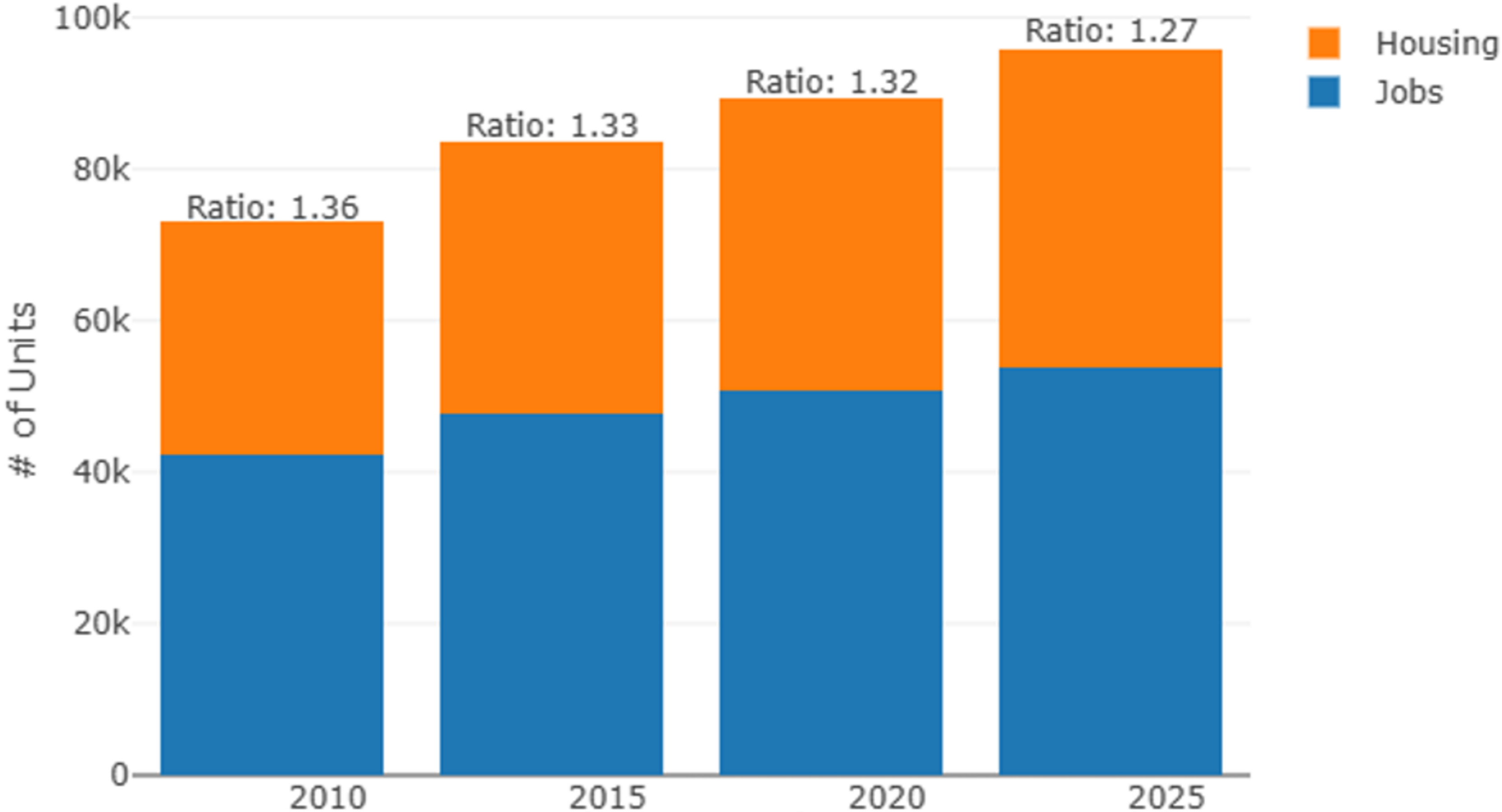
Household Size



Household Composition

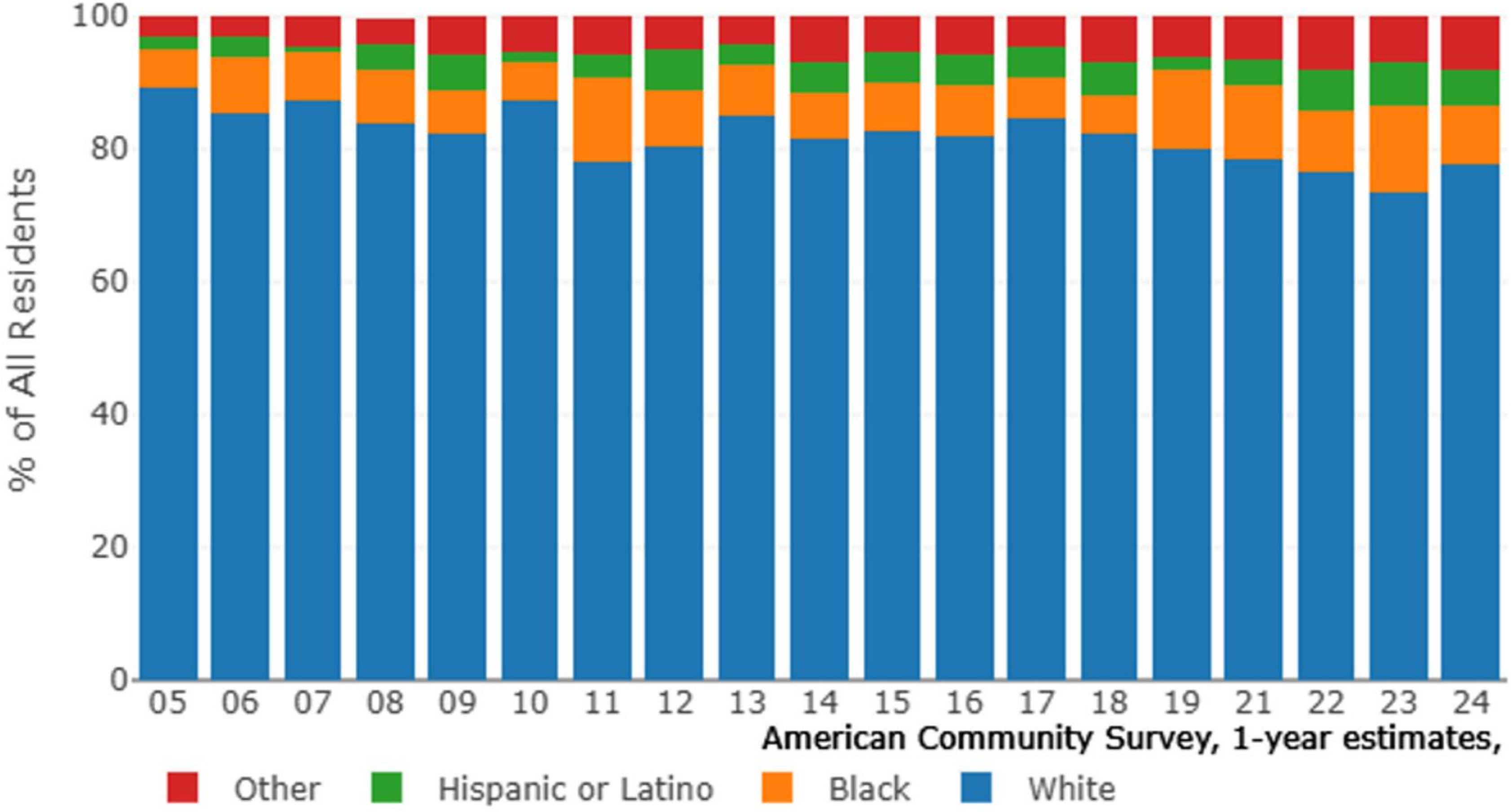


Income Levels & AMI

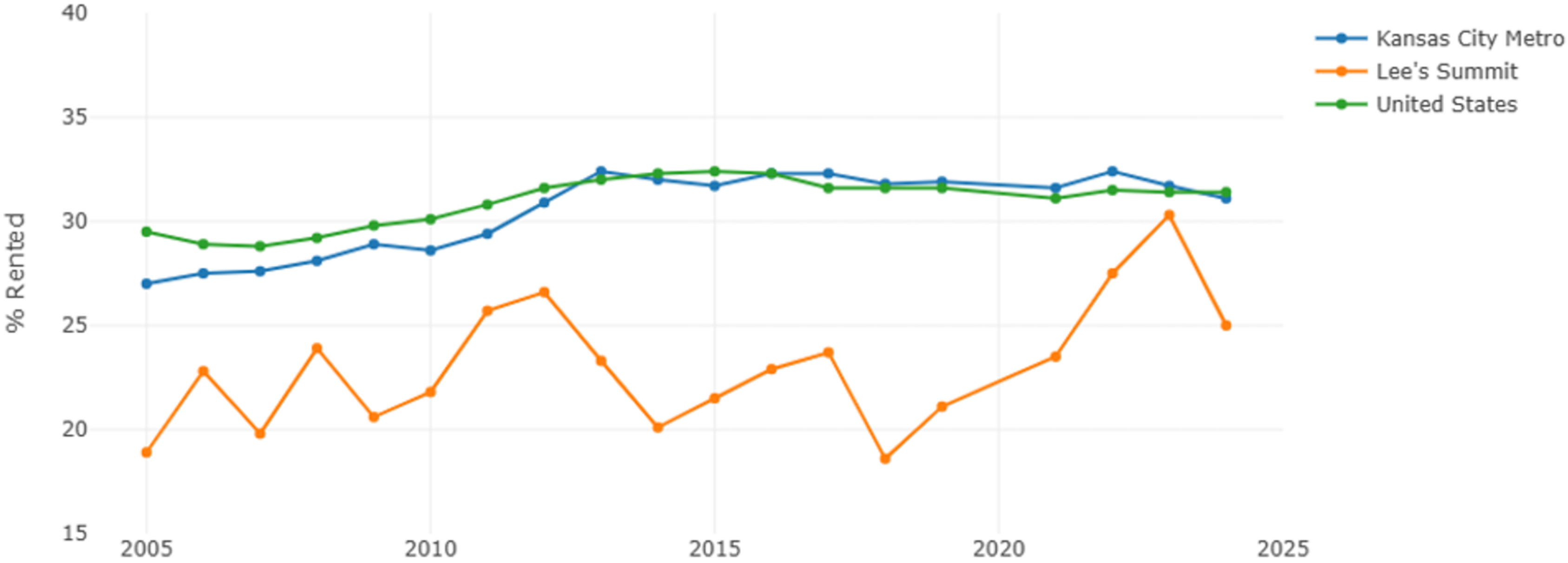


American Community Survey, 1-year estimates.

Job Housing Balance



Race & Ethnicity



American Community Survey, 1-year estimates.

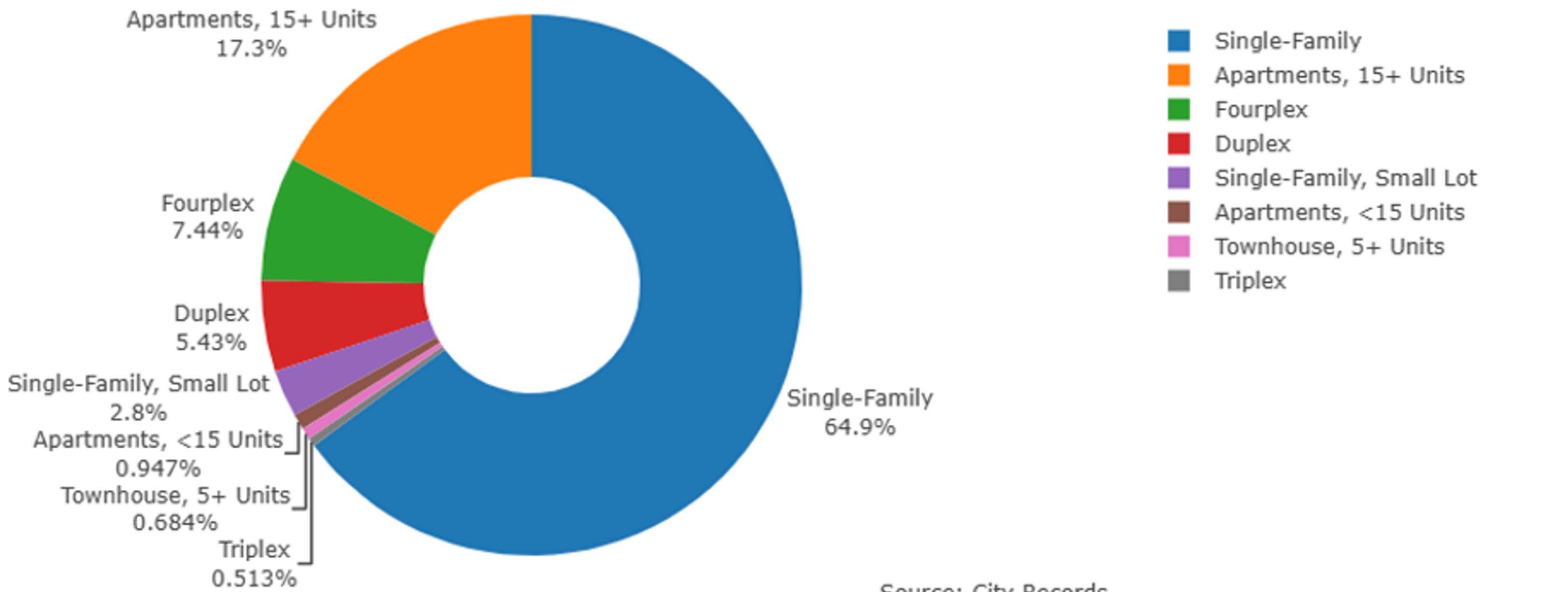
Owner vs. Renter Occupancy

Key interpretation

46,765 total dwelling units citywide	**838** dwelling units in infrastructure pipeline
Low owner and rental vacancy rates	**Below** pre-recession single-family production levels

Demand has continued while production has not returned to historic levels. Low vacancy means fewer choices and more upward pressure on prices and rents.

Housing Supply & Production



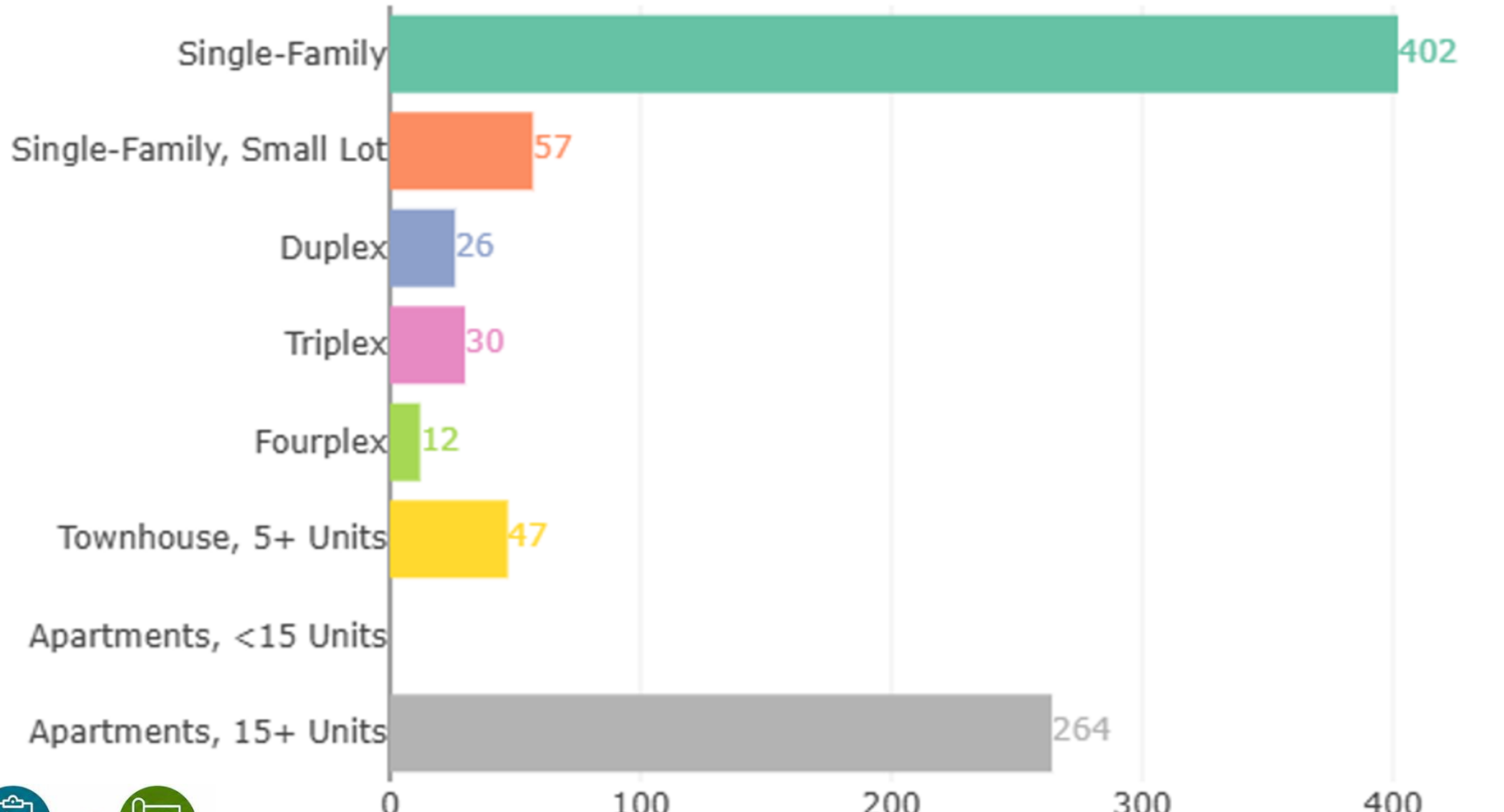
Source: City Records.

Housing Type	Units	Percent of Total
Single-Family	30,342	64.9%
Single-Family Small Lot	1,308	2.8%
Duplex	2,539	5.4%
Triplex	240	0.5%
Fourplex	3,479	7.4%
Townhouse (5+ Units)	320	0.7%
Apartments (<15 Units)	443	0.9%
Apartments (15+ Units)	8,094	17.3%
Total	**46,765**	**100.0%**

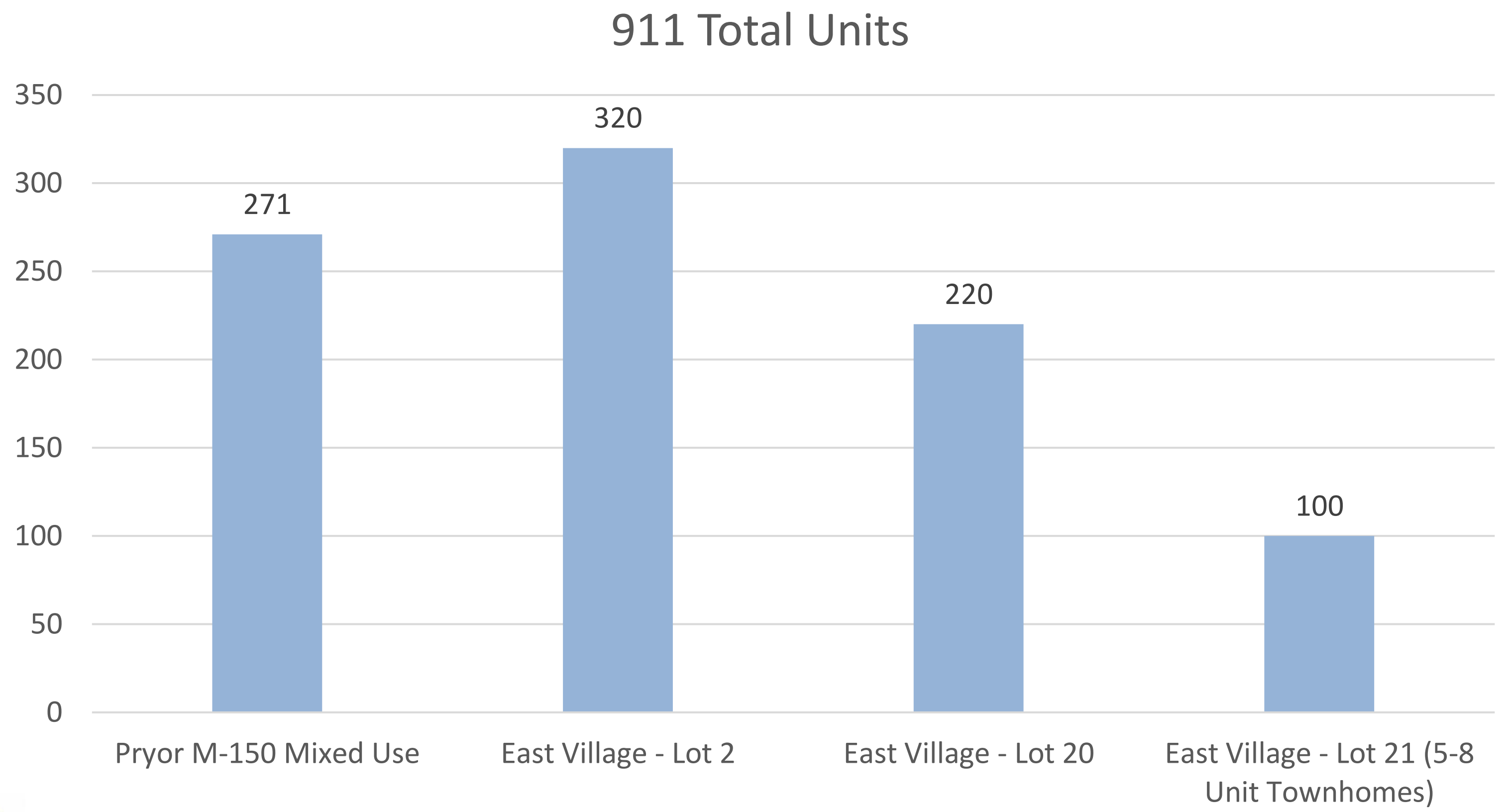
5. Occupancy

Dwelling Units & Unit Mix

838 total units in the pipeline

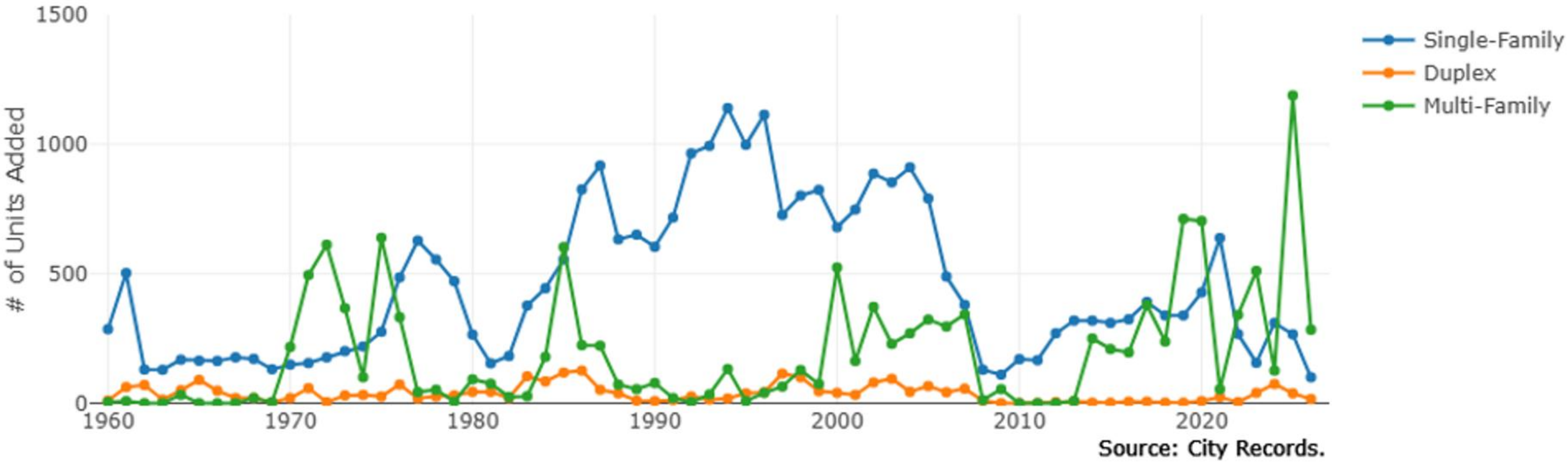


Pipeline Units

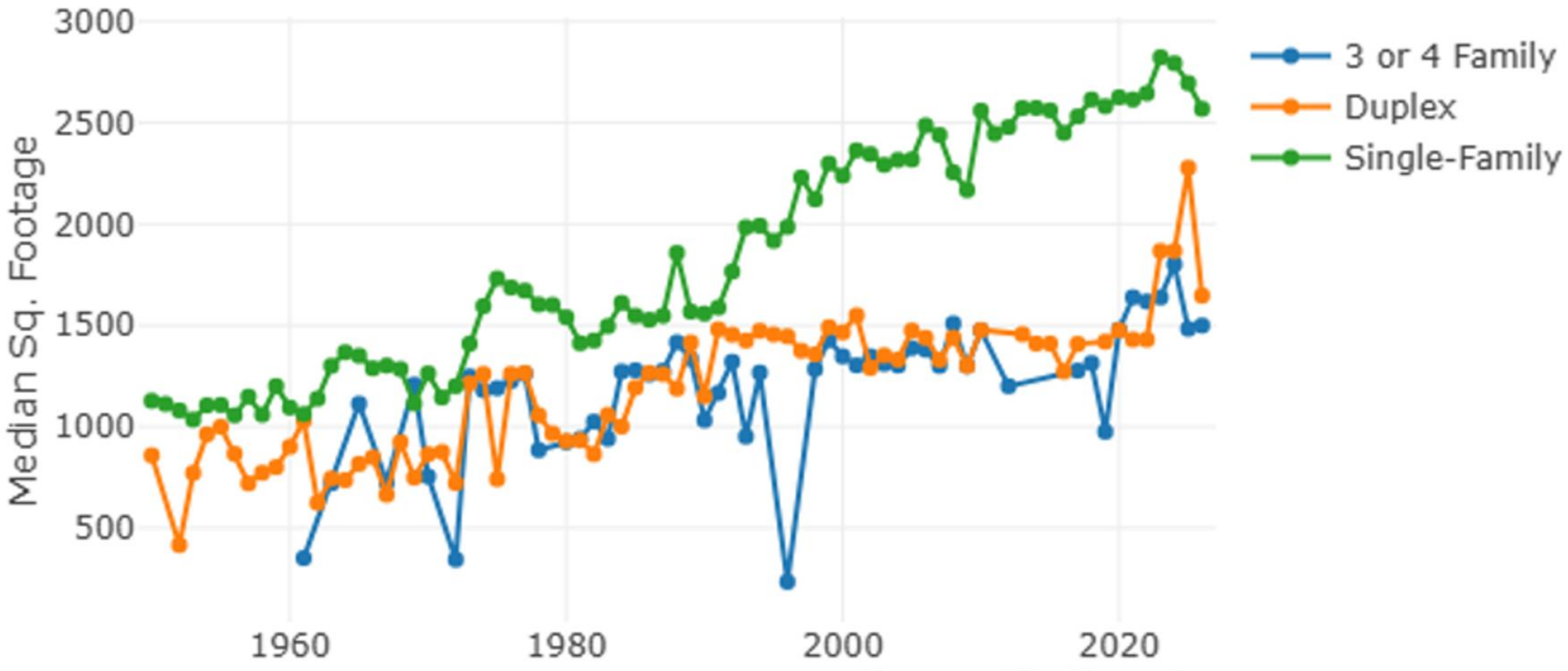


1. Entitlement (PDP/Rez)

Beyond Pipeline

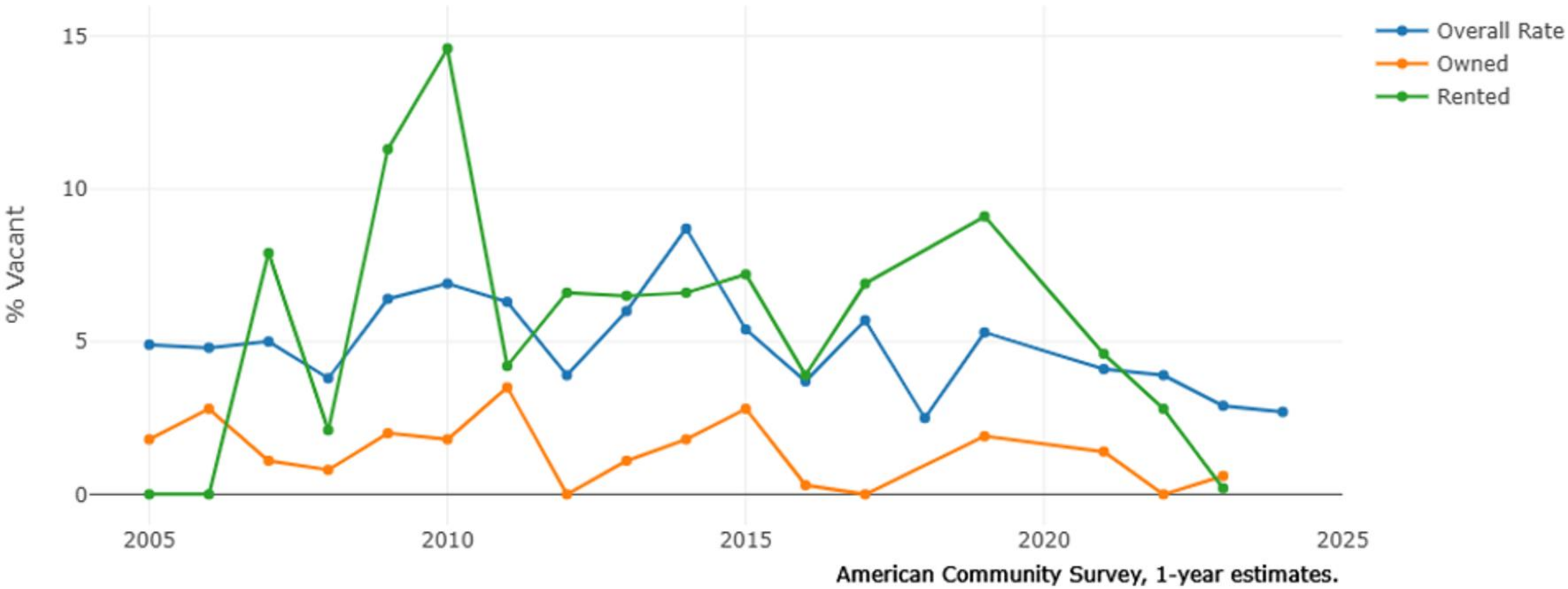


Housing Permit Issuance



Source: City Records.

Dwelling Size by Type Over Time



Vacancy Rates

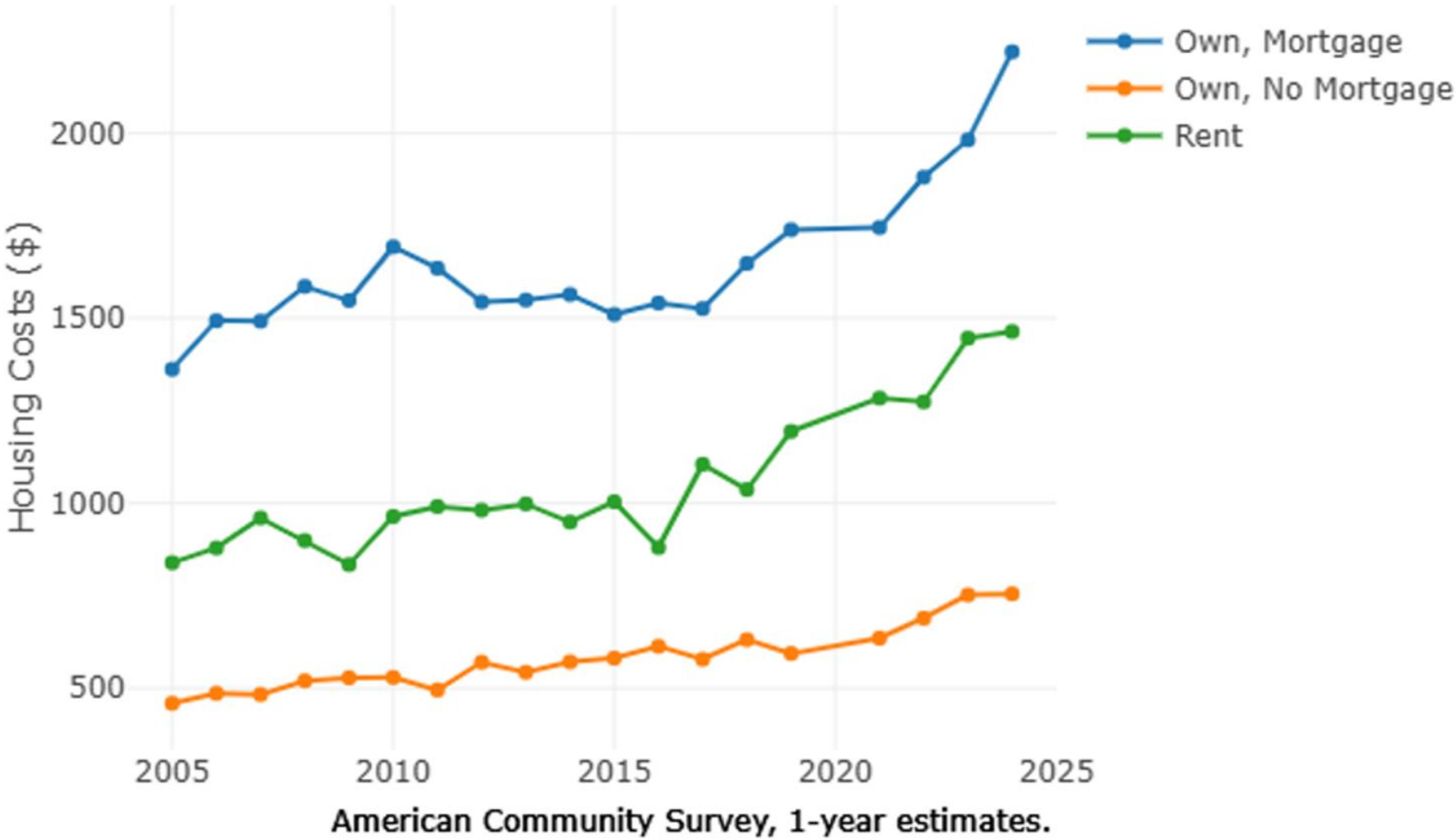
Housing cost stress is concentrated, not universal.

~1/3
of all households
are cost burdened

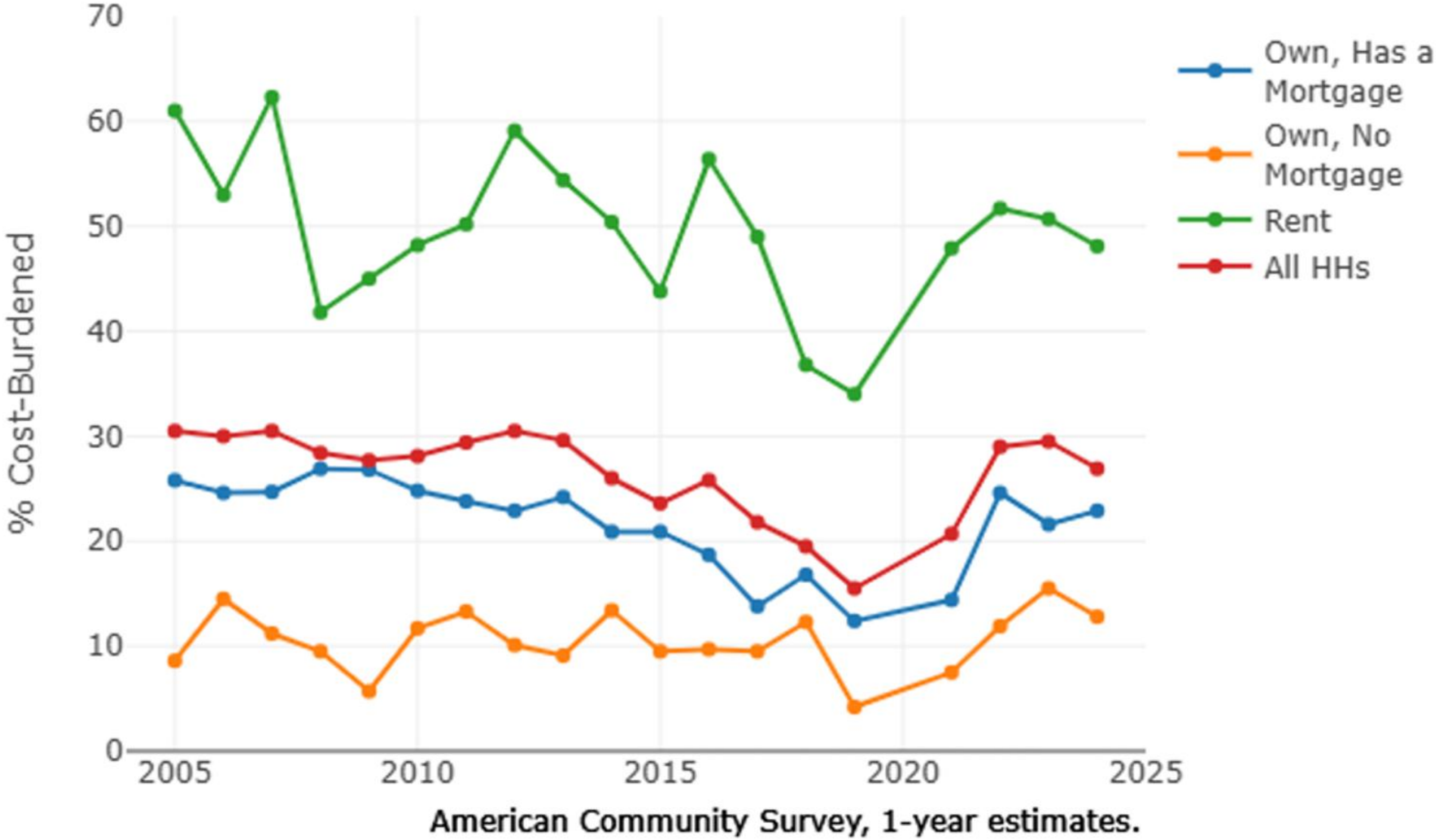
~1/2
of renter households
are cost burdened

~1/2
of single-family inventory
qualifies as NOAH

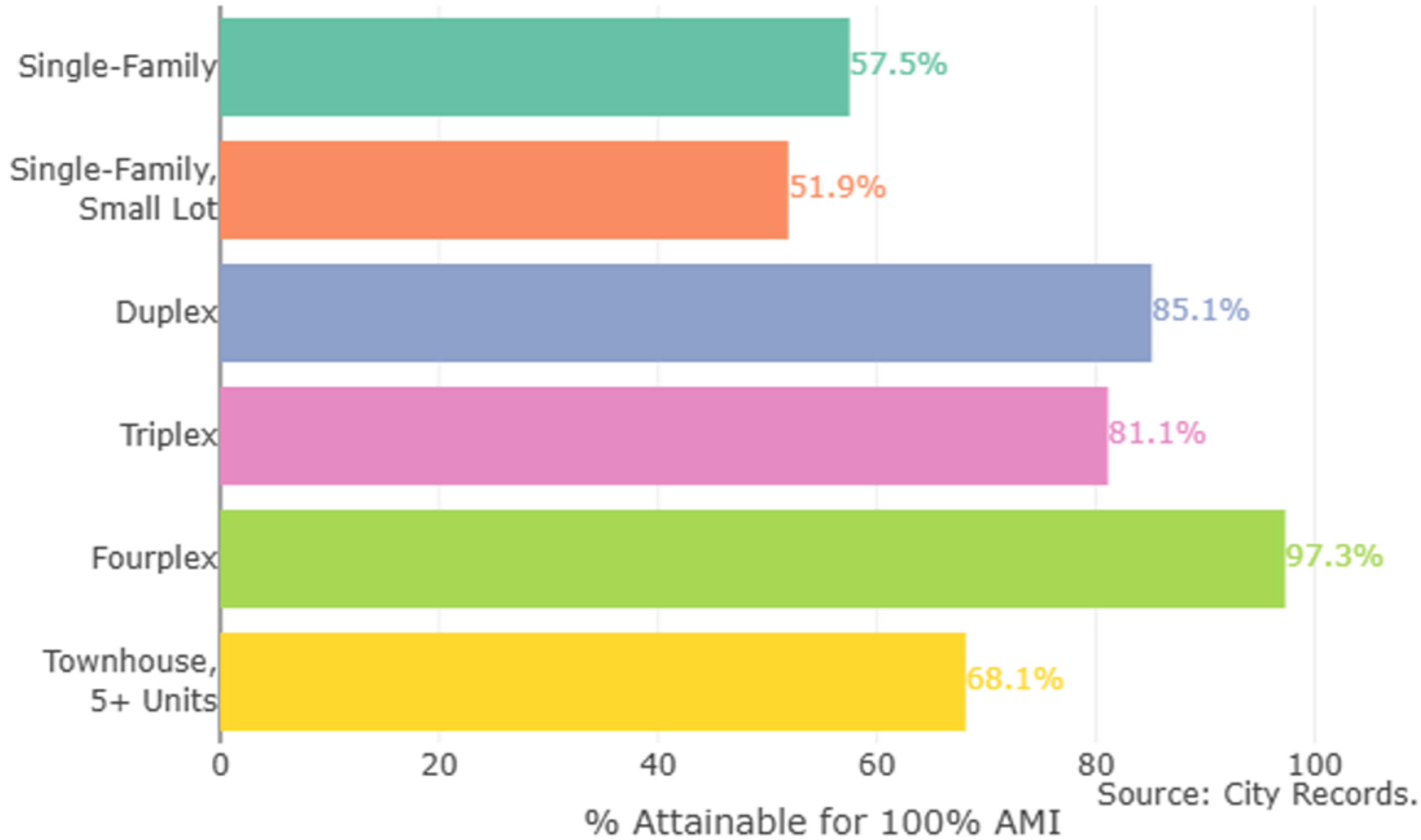
Preserving existing attainable housing may be just as important as producing new units



Housing Costs Over Time



% of Households Cost Burdened



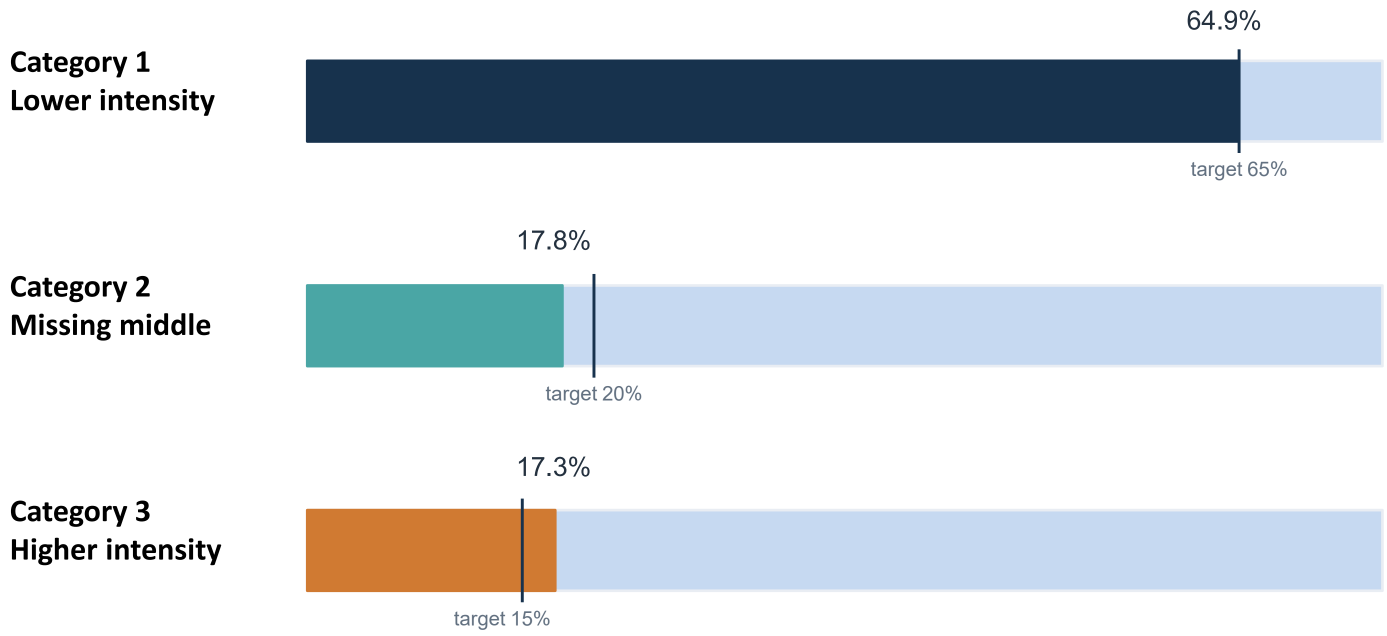
% NOAH by Structure Type

The City can influence housing outcomes – not control the market

THE CITY CAN INFLUENCE	THE CITY CANNOT DIRECTLY CONTROL
Comprehensive Plan policies	Mortgage interest rates
Zoning regulations	Inflation
Permitted housing types	National economy
Development review process	Construction labor availability
Density and lot size regulations	Material costs
Parking requirements	Federal monetary policy
Infrastructure investments	Population migration trends
Utility capacity	Household preferences
Development incentives	Private lending standards
Building codes (within state authority)	Private investment decisions
Development fees	Regional land values
Public land disposition	Household income growth
Tax policy (limited)	National demographic trends
Partnerships with nonprofits and developers	Consumer confidence
Streamlining permitting	Availability of private capital

Where can local action reduce barriers, improve predictability, preserve housing, or align incentives with desired outcomes?

Current share vs. Ignite! 2040 targets



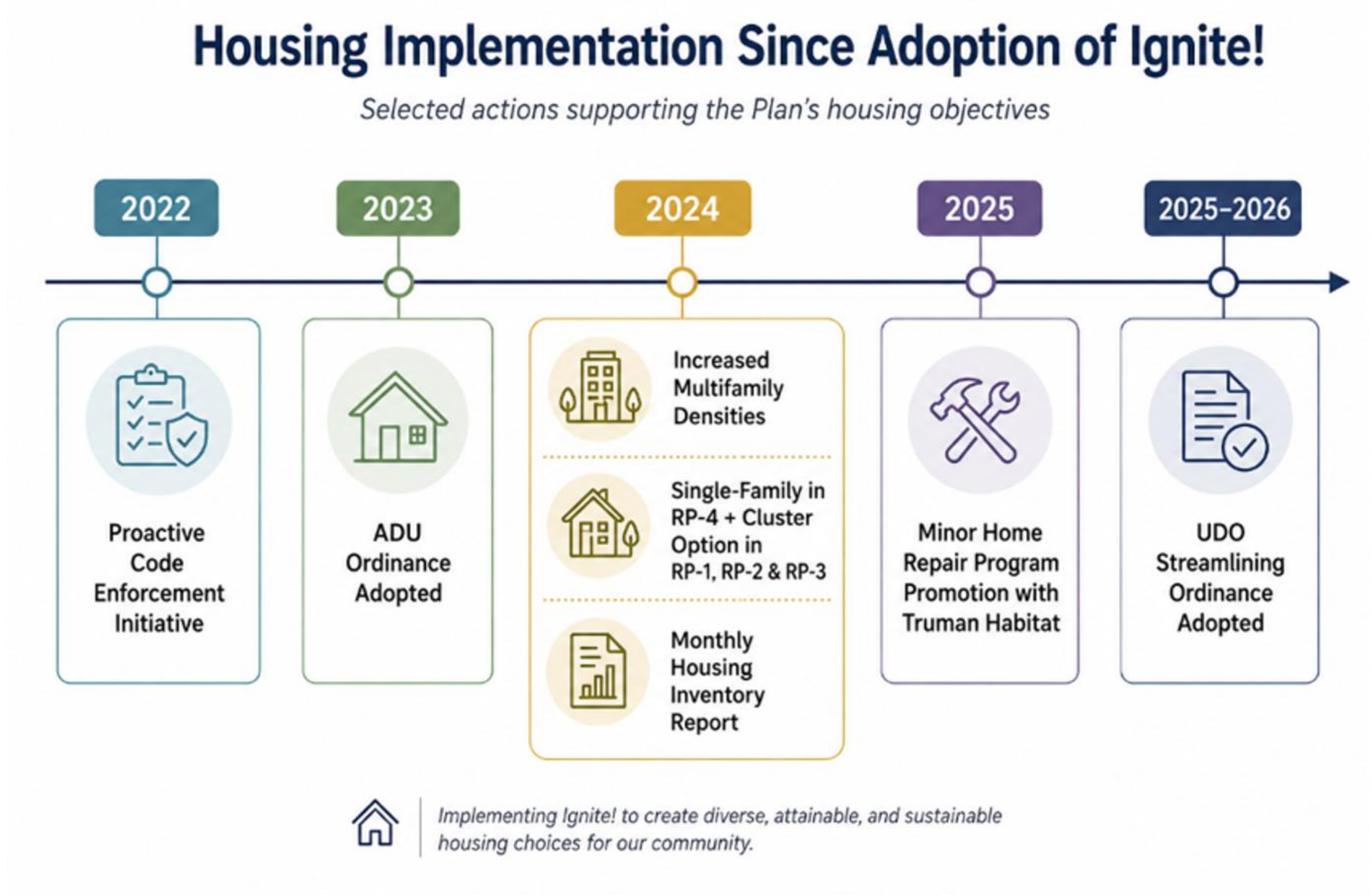
Key interpretation

The Comprehensive Plan does not call for replacing single-family neighborhoods with apartments

Targets are communitywide guideposts — not annual quotas, neighborhood caps, or automatic grounds for denial

The largest policy gap is Residential Category 2: “missing middle” housing that fits between traditional subdivisions and larger apartment projects

At its core, the Ignite! Comprehensive Plan's housing policy is about one thing:
Choice



Housing Accomplishments

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