

Impact of State Policies and Programs on Housing Production

Public Webinar | August 13, 2026





Background

Study Overview

Report Organization

Tribal Consultation and
Public Comment Period

Q&A



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Background

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Background: SB 1537 & HAPO Establishment

Senate Bill 1537 was adopted by Oregon State Legislature in 2024.

The bill advances tools that will increase housing production, affordability, and choice throughout Oregon.

A new initiative established by the bill includes the **Housing Accountability and Production Office (HAPO)**, which is administered by DLCD and BCD.

- *The goal of HAPO is to ensure support local governments in navigating state resources, processes, ensure compliance with state housing laws, and improve housing production.*

SB 1537 Section 5 charges HAPO with conducting research on barriers to housing production and complete *two legislative study reports*:

- *State-Level Barrier Evaluation – “Evaluation of Statewide Policies & Programs on Housing Production”; and*
- *Local-Level Barrier Evaluation – “Local Residential Development Process Improvement (LRDPI) Study*



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- Local-Level Barrier Evaluation – “*Local Residential Development Process Improvement (LRDPI) Study*”

Project Purpose

Conduct a multi-agency evaluation to identify opportunities to:

- Reduce state-level barriers to housing production
- Maximize the use of agency resources and programs to increase production



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Agencies Involved



State Historic
Preservation Office



Regional Solutions



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Project Scope

Addresses land availability and readiness, infrastructure, permitting, construction standards, and financing/technical assistance

Align with process and recommendations of the Local Residential Development Process Improvement Study (SB 1537 Section 5 (2))

Does not address barriers related to materials, labor, or construction industries



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Key Research Tasks

- Background research
- Systematic inventory
- State agency interviews (Phase I)
- Interested parties survey
- Focus groups
- State agency interviews (Phase II)
- Program and policy analysis



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Project Objectives

- Identifying **state agency policies and programs** related to housing production;
- Summarizing state actions related to **reducing or eliminating regulatory barriers** to housing production;
- Identifying state actions that **create regulatory and other barriers** to housing production;
- Identifying state actions that **provide technical assistance or funding** intended to facilitate infrastructure related to housing or directly boost production; and
- Providing **recommendations on how state agencies may prioritize resources and programs** to increase production.



Study Overview

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Study Approach

- **State agency actions involved in housing development** from land supply through to construction
 - Plans
 - Agency programs
 - Policies and regulations
 - Finance programs and tools
 - Technical assistance and resources
 - Procedures and Permitting
- **Actionable recommendations** for state agencies, the Governor's Office, and the Legislature
 - Statutory changes
 - Rulemaking changes
 - Administrative changes
 - Use of existing resources (technical and financial)
 - Interagency collaboration
 - Provision of guidance; resource documents



Evaluation Framework - Assessing Impacts

Two related dimensions of impact

- Project-level effects on housing development
- Policy and system level feasibility and implementation considerations

Against the following criteria

- Cost
- Time
- Risk
- Complexity



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Evaluation Framework - Assessing Impacts

Additional considerations that emerged from engagement process

- Clarity and consistency
- Predictability
- Interagency alignment
- Scalability and capacity
- Distributional effects
- Opportunity cost



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Study Design and Limitations

- Qualitative assessment of how state agency policies and programs affect housing production
- Scope of the study required a “funneling approach”
 - Narrow from 230+ entries in the inventory
 - Based on experience/familiarity with the program or policy
 - Perspective on benefits/hinderance of policy or program
 - Specific examples or experienced for topics most frequently identified
- Timing
 - Changing regulatory and policy landscape
 - Implementation of recent changes not yet measurable



Engagement Overview

- Tribal Consultation
- State Agency Engagement
- Inventory of Policies and Programs
- Interested Parties Survey
- Focus Groups



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Tribal Consultation

- January 2026: Consultation letters sent to federally recognized tribes
- February 2026: Presentation to the Tribal Housing Work Group
- March – April: Follow up calls made
- June 2026: Presentation to Cultural Resources Cluster Work Group
- August 2026: Share draft report and opportunity for consultations



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State Agency Engagement

- State Agency Work Group
- Phase I Interviews
 - Learn how agencies align housing production within mission and programs
 - Collect information on recent or upcoming changes to related to housing production
 - Solicit possible solutions to identified challenges and opportunities
 - Collect agency perspectives on what they have heard from local government and housing providers
- Phase II Interviews
 - Address knowledge gaps in program design and internal processes
 - Gather additional agency perspective on program-level challenges and opportunities
 - Solicit possible solutions to identified challenges and opportunities
- Document review



Inventory

- 230+ entries
- Across 10 state agencies or programs
- Review by state agency work group through a questionnaire
- Verified through state agency interviews
- Verified through agency document review
- Additions made based on survey outcomes and focus group discussions



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Interested Parties Survey Overview

Purpose: solicit input from people knowledgeable about how state policies and programs impact housing production

- Public sector – primarily local government
 - Planners
 - Public works
 - City managers/administrators/clerks
 - Trade board members
- Private sector
 - Developers
 - Builders
 - Trades
 - Industry consultants
- Nonprofit sector
 - Developers
 - Advocacy organizations



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Survey Administration & Response

- Open from December 4th, 2025 – January 19th, 2026
- 687 total responses
- Combined email list of ~1,300 addresses
- Additional distribution through:
 - OHBA
 - NOAH
 - DLCD (including LinkedIn)
 - AIA
 - Housing Authorities
 - OHCS Partner Email list (1300)
 - Regional Solutions Email list (1500)



Focus Group Overview & Response

- Held April 2026 – May 2026
- 12 focus groups on 8 topics
- 109 unique participants
- 9 participants joining more than one
- 23 additional response through optional follow-up form
- Public sector – primarily local government
 - Planners
 - Public works
 - City managers/administrators/clerks
 - Trade board members
- Private sector
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Topic	Target Audience	# of FGs
Wetland Regulations and Incentives	Cross-sector	1
Affordable Housing Funding Programs and Application Procedures	Affordable Housing Developers; Cross-sector	2
Infrastructure Gaps and Funding Programs	Developers; Cross-Sector	2
Land Use Planning Requirements and Technical Assistance	Large cities; Small cities; Developers	3
Land Availability	Cross-sector	1
Redevelopment Opportunities	Cross-sector	1
Historic Preservation and Archaeological Permitting	Cross-sector	1
Building Codes and Technical Assistance	Cross-sector	1



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Report Organization

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What to Expect in the Summary Report

Ch. 1: Introduction

- Context
- Background
- Overview of Methods

Ch. 2: Research Framework

- Scope of the study
- Evaluation Framework
- Analysis and Engagement Summary
- Limitations



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What to Expect in the Summary Report

Ch. 3: Regulatory and Permitting Actions

- Land Use Planning Requirements and Land Availability
- Design and Construction Review and Approval
- Wetlands and Waters Regulations and Incentives
- Historic Preservation and Cultural Resources Review
- Infrastructure System Capacity: Transportation, Stormwater, Drinking Water, Wastewater
- Cross-cutting Regulatory Issues



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What to Expect in the Summary Report

Ch. 4: Financial Incentives and Technical Assistance

- Infrastructure Funding Programs
- Affordable Housing Funding and Support
- Cross-cutting Regulatory Issues



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Structure of Ch. 3 and Ch. 4

Chapters are organized around set of policy themes

- Key Statutes, Rules, and Programs
- What We Heard
- Impact on Housing Production
- Recommendations



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What to Expect in the Summary Report

Ch. 5: Opportunities
to Reduce Barriers
and Prioritize
Resources to Increase
Housing Production

- Summary of key themes across Ch. 4 and 5
- The relationships between regulation, incentives, and technical assistance
- Overarching recommendations (themes)
- Priority recommendations

18 priority
recommendations

Full list of all
recommendations



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Report Organization – Technical Report (Appendices)

- Part A: Summary of Background Research
- Part B: Analytical Framework
- Part C: Policy and Program Inventory
- Part D: Engagement and Methods Summary
 - State Agency Work Group
 - Multi-Party Survey
 - Focus Groups
 - Phase I Interviews
 - Phase II Interviews
 - Public Comment
- Part E: Recommendations
 - Recommendations included in the report
 - Recommendations excluded from the report



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Key Themes

- Opportunities for Cross Agency Coordination on Planning, Permitting, and Funding
- Infrastructure Planning and Implementation as a Bottleneck
- Regulatory Burden and Cumulative Impacts
- Pace Legislative Change with Limited Local Capacity
- Focus on Housing Relative to Other Goals



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Overarching Recommendations

- Prioritize limited resources towards those strategies and tools that provide the most return on investment
- Focus on immediate production of housing
- Promote affordability and choice through supporting the development of affordable, middle and multi-unit housing
- Work within the programs and factors where state action is most feasible
- Strengthen existing efforts rather than create new programs



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Tribal Consultation and Public Comment Period

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Public Comment Period

Public comment period will allow interested parties to review the draft report and provide feedback prior to submission to the Legislature:

Opened on
August 7, 2026, at
4:30 PM



Closes
August 24, 2026, at
11:59 PM



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Public Comment Period

Deadline: August 24, 2026, at 11:59 PM (PST)

[Project Website](#)



Housing Production Research & Legislative Reports

The Housing Accountability and Production Office (HAPO) undertakes research and analysis of the state and local programs, policies and processes related to housing development and production. The work includes the legislative reports required by SB 1537, Section 5 (2024). Information on these two reports may be accessed below. As the work progresses, HAPO will update this page with additional information on these reports.

Legislative Reports - SB 1537, Section 5 (2024)

Impacts of State Policies and Programs on Housing Production

- [Factsheet](#)
 - Draft Report Available for Public Review and Comment
 - [Draft Report](#)
 - [Draft Technical Report \(Appendices\)](#)
- Comment period is open through Monday, August 24 (11:59 PM)
- [Public Comment Form](#)

Local Residential Process Improvement Study

- [Draft Report](#)
- Appendices:
 - [Appendix A: Barriers Memo](#)

[Comment Form](#)



Impacts of State Policies and Programs on Housing Production – Public Review Draft Comment Form

About the Study

Oregon Senate Bill (SB) 1537, passed in 2024, directed the [Housing Accountability and Production Office \(HAPO\)](#) to produce a report that identifies opportunities to reduce state-level barriers to more housing and strategically maximize the use of agency resources and programs to increase housing production, including opportunities to streamline processes and procedures and to deploy state resources in ways that demonstrably increase housing production. The study is referred to as the [Impacts of State Policies and Programs on Housing Production Study](#).

Study methods included comprehensive background research, an inventory of state policies and programs, a multi-party survey with over 680 responses, 12 focus groups, and state agency engagement through a state agency work group.



Form Details

- Review study background and scope
- Ask for name, organization, sector, region
- Do you agree that the prioritized recommendations provided in Chapter 5 will improve housing production outcomes across Oregon?
- Space for open-ended comment on the clarity of the report and recommendations
- Option to upload files



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Form Details

Specific content from public comments, including commenters' names, organizations, or other identifying information, will not be included in the final report.

The report will only include aggregated findings from public comment in the technical appendices.



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Review Guidance

- What stands out?
- What is missing?
- Clarity of report and recommendations
- Are the recommendations actionable and meaningful?



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Impact of State Policies and Programs on Housing Production



QUESTIONS