Oregon Housing Needs Analysis

Oregon is in a Housing Crisis ⟫⟫⟫⟫⟫

Oregon's housing crisis has deep historical roots, resulting in part from decades of building less housing than needed to keep up with Oregon's rapid population growth. Between 2015 and 2019, Oregon's population grew by three residents for every new housing unit. This crisis continues to disproportionately impact low-income households and BIPOC communities.

The legislature has identified this urgent need as a priority and directed state agencies to help provide solutions. Local government partners, developers, lenders, and community members all have a role to play as we work together to address this crisis.

What is "Goal 10"? ⟫⟫⟫⟫⟫⟫⟫⟫⟫⟫⟫

Oregon's land use planning system is based on 19 statewide goals. Statewide Planning **Goal 10: Housing** outlines the state's commitment to housing production, affordability, and choice. **Goal 10: Housing** provides the groundwork for housing planning in Oregon. Local comprehensive land use plans have an obligation to address **Goal 10**.

What is OHNA? ⟫⟫⟫⟫⟫⟫⟫⟫⟫⟫⟫⟫

The Oregon Housing Needs Analysis (OHNA) is the first substantial update to **Goal 10** since its establishment over 50 years ago. It fundamentally shifts the way cities are planning for housing. Key changes include a heightened focus on equitable outcomes and fair housing principles, a data-driven methodology for estimating housing need, and more state support. Rather than projecting future housing targets based on past trends, which perpetuates harmful patterns, the OHNA addresses present local needs based on data and analysis.

The OHNA framework establishes a coordinated statewide approach to housing planning that shifts much of the work and cost of the analysis from local governments to a state-supported process. The OHNA helps identify and address local barriers to housing production, and it provides targeted assistance and resources to support local governments in those efforts. New state laws also clarify the process by which cities determine if they have enough land to accommodate housing.

New state housing laws to implement the OHNA begin to roll out in 2025, with most new provisions effective by 2027. Advisory committees, community members, local partners, and other interested parties are involved in the development of tools, resources, and guidance to advance housing production, affordability, and choice.

The Updated Goal 10 Process

1 - Determine housing need

The state determines needed housing across 7 regions, allocating production targets for cities with populations greater than 10,000.

Local planners and developers work with the community to better understand the unique, local housing needs, including housing types, features, costs, and locations.

Housing Production Allocations – The state estimates Oregon's total number of needed housing units over a 20-year time period, setting housing production benchmarks.

Housing Production Targets – The state annually assigns housing production benchmarks to each city.

Contextualize Housing Need – Cities factor fair housing choice into current and future housing needs.

Housing Capacity Analysis – Cities determine if they have enough land to meet projected housing needs for the next two decades.
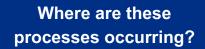
Where are these processes occurring?

State level

Local level

State and local levels

2 - Respond to local need

The state provides resources and support to develop local strategies.

Local planners and developers create and implement a strategy to address identified fair housing issues and production targets, ensuring enough buildable land is available to meet housing needs.

Housing Production Strategy – Cities identify specific and meaningful tools, actions, and policies to address their housing needs, along with a timeline for adopting and executing each strategy.

3 - Track and monitor progress

The state tracks local progress toward production targets and fair housing goals.

When the state or local planners identify barriers, they partner to accelerate production, affordability, and choice.

Housing Production Dashboard – Cities report production data in an annual survey, informing this statewide tool which tracks cities' progress toward their unique housing production targets.

Housing Acceleration Program – Eligible cities that are not meeting annual housing productions targets may receive extra assistance from the state.

Questions? Learn more at www.oregon.gov/lcd/housing or contact

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Improving the Goal 10 Framework

Collaboration Across Communities

The OHNA recognizes that housing markets and needs often cross city or county lines. With the OHNA, the state allocates housing needs to local governments by affordability bracket through a standardized methodology, creating a better sense of our statewide need and allowing for better coordination across regions.

State Support and Resources

With the OHNA, the state monitors the progress of local governments toward their housing production targets, identifies barriers, and provides technical assistance and funding.

Focus on Equity

The OHNA establishes and standardizes equity requirements to ensure housing policies address the needs of marginalized and underserved groups.

Policy Framework

The OHNA establishes local governments obligations to meet data-based housing needs, supported by state analysis, tools, and assistance.

Identifying True Market Needs

The OHNA prepares the local policy landscape to better address market housing needs.

Addressing Barriers

The OHNA considers barriers to housing production, including regulatory roadblocks, financial limitations, as well as infrastructure and land capacity obstacles.

Frequency of Assessments

The OHNA requires local governments to update their Housing Capacity Analysis and Housing Production Strategy on a regular schedule to reflect economic and demographic changes.