Oregon Housing Needs Analysis Implementation: Engagement Framework

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Prepared for:
Oregon Department of Land Conservation and Development
Oregon Housing and Community Services
This engagement framework document was written by Kearns & West, ECONorthwest, and Communitas Planning as part of the Oregon Housing Needs Analysis Implementation effort. This engagement framework accompanies an implementation framework document, entitled *Meeting Oregon’s Housing Needs: Next Steps for Equitable Housing Production*, prepared by this team and WMPA Strategies. These documents have been prepared for the Department of Land Conservation and Development (DLCD) and the Oregon Housing and Community Services (OHCS) Department as pursuant to 2021’s House Bill 5006 directing these agencies to implement the Regional Housing Needs Analysis developed under House Bill 2003 (2019).

For this implementation effort, the Regional Housing Needs Analysis (RHNA) was renamed the Oregon Housing Needs Analysis (OHNA).
Project Background

Under direction from the State Legislature, the Oregon Housing and Community Services (OHCS) Department and the Department of Land Conservation and Development (DLCD) are developing a framework to implement an Oregon Housing Needs Analysis (OHNA) program. The OHNA builds from the Regional Housing Needs Analysis work conducted after the passage of House Bill 2003 (2019) and will culminate in a recommendations report to the Legislature in advance of the 2023 session advising on how the state could implement the OHNA.

To conduct this work, DLCD and OHCS have retained ECONorthwest, Kearns & West, Communitas Planning, and WMPA Strategies to assist in developing the OHNA, exploring ways to implement it, direct public engagement, and craft the Legislative recommendations report.

In addition to providing overall production targets, the OHNA also provides local data and information about racial and other disparities in housing outcomes, including cost burdening by race and ethnicity and for people living with disabilities. In future iterations, it may also provide information about segregation by race and income within some cities.

Implementing the OHNA to identify local housing production targets statewide and develop systems to achieve this production has numerous far-reaching considerations. A companion Implementation Framework document, entitled Meeting Oregon’s Housing Needs: Next Steps for Equitable Housing Production, expands on these considerations, but in short, the state would need to:

- Identify funding to increase housing production (particularly producing housing affordable to low-income households),
- Identify accountability mechanisms to ensure compliance with production goals,
- Build state administrative capacity to oversee expanded accountability and funding, and
- Identify how the OHNA would intersect with the current land use system.

The OHNA work builds on that performed under House Bill 2003 (2019). Legislators were clear that the intent of that legislation was to make changes that go beyond measurement, to also include real change in the following areas:

1. Increased overall housing production,
2. Increasing publicly funded\(^1\) and affordable\(^2\) housing production

3. Inclusive and integrated communities through increased focus on fair housing in production, and geographic housing equity.

*Meeting Oregon’s Housing Needs: Next Steps for Equitable Housing Production* describes the spectrum of options to implement the OHNA. It is clear, however, that changes to the current housing planning system necessitate a robust community engagement effort with a variety of stakeholders.

The engagement for the OHNA Implementation is two-fold:

1. Engagement focused on near-term policy development to support the legislative recommendations report includes, and
2. Engagement focused on the longer-term goal of embedding historically marginalized voices into the OHNA implementation and eventual system.

DLCD and OHCS will oversee both components of engagement and will coordinate all findings across the team members. The project team will lead the direct engagement surrounding near-term policy development as the legislative recommendations on how to implement the OHNA are drafted. DLCD has partnered with the Homelessness Research and Action Collaborative (HRAC) at Portland State University to lead the development of recommendations for longer-term engagement.

**What Does This Report Do?**

This Engagement Framework outlines the stakeholder engagement needed to support the near-term policy development and recommendations report to the Legislature. It discusses the purpose, scale, intent, and timing of statewide engagement for the project. A brief discussion of the longer-term engagement work is provided on page 11.

**OHNA Implementation Engagement**

The purpose of this direct engagement is to continue the robust engagement process that began with the implementation of House Bills 2001 and 2003 (2019), with the goal of ensuring that

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\(^1\) In this document, “publicly-funded housing” refers to a range of public supports that include subsidies tied to rent- or income-restricted units or any other form of public contribution to housing production (such as local incentive programs to encourage market rate housing). It may also include rent vouchers, designed to connect people to units.

\(^2\) “Affordable” housing refers to housing that is affordable to a household of a given income, if that household spends no more than 30% of its monthly income on housing costs. In this way, the term “affordable” includes regulated rent- or income-restricted units as well as unregulated affordable units (such as workforce housing).
further legislative actions will lead to increased housing production, increased publicly supported affordable housing production, and improved equity in housing outcomes.

As the OHNA Implementation work will culminate in a recommendations report to the Legislature in advance of the 2023 session, the goal of this engagement process is to ensure that these legislative recommendations are implementable, productive, and more responsive to the entirety of Oregon’s housing need than the existing housing planning process.

**Engagement Principles**

The engagement principles identified in this process build off the continuing implementation of 2019’s House Bills 2001 and 2003 to increase housing supply and choice across the state of Oregon and develop legislative and policy recommendations to implement the OHNA.

- Reach a broad and thorough range of community partners and carefully consider all perspectives, with an emphasis on households with lower incomes and no income.
- Facilitate values-driven policy development to ensure that legislative recommendations meaningfully advance racial equity and affordable, fair, and equitable housing outcomes.
- Prioritize consistent and precise messaging and communication to key stakeholders on these specific housing and land use topics which have significant implications.
  - Provide up-to-date information on OHCS / DLCD websites and in electronic communication notifications to interested parties (through DLCD and OHCS).
  - Coordinate effectively with stakeholder groups, related state agencies, and advocates to share messages about engagement opportunities and project updates/deliverables.
  - Provide transparent communication about the role of engagement – to provide feedback on a set of recommendations to the legislature and ensure they are adequately resourced.
  - Develop inclusive and audience-appropriate messaging to facilitate productive discussions surrounding complex and technical concepts.

**Stakeholder Identification**

The focus of the OHNA Implementation engagement will be with stakeholders outside the legislative structure (i.e., Governor’s office and elected officials at the state, regional or local government level). This includes community-based/equity stakeholders across the state, housing groups (e.g., Oregon Housing Alliance, Fair Housing Council of Oregon, Community Alliance of Tenants, etc.), and culturally specific organizations whose members or clients are most directly impacted by housing inequities, houselessness, and residential segregation and discrimination.
Conversations with community organizations will be framed in a policy context that acknowledges community concerns and experiences identified through past and concurrent engagement efforts. As needed, this effort will also engage land use planning and housing staff focused on housing policy implementation.

DLCD and OHCS have identified a broad range of housing stakeholders, including:

- Land use planning and housing policy staff at local and regional government agencies
- Local and regional staff who work closely with houseless, renters, households with low incomes
- Equity and housing-related advocates and advocacy organizations
- Market-rate and subsidized affordable housing developers, lenders, and other real-estate actors
- Continuums of care and other community-based organizations that fund or provide housing-related services
- The Governor’s office and related committees, including committees on housing and racial justice
- Agency staff that would be charged with a role in implementation, including DLCD and OHCS and potentially other agencies, such as ODOT, OHA, and DHS

**Engagement Framework**

Engagement will focus primarily on key questions to inform policy approaches that advance racial equity and affordable, fair, and equitable housing outcomes. Feedback, key themes, and recommendations gathered through the engagement process will be summarized into a document that informs near-term policy development. There are two components of engagement planned for the OHNA Implementation that will be led by this project team from February 2022 through June 2023:

- A Working Group composed of a variety of land use and housing experts and practitioners to provide guidance on the recommendations report DLCD and OHCS will submit to the Legislature, and
- Direct engagement with additional stakeholders and organizations serving impacted communities.

The project team will lead a stakeholder engagement and Working Group process with the goal to ensure legislative recommendations are implementable, productive, and responsive to the entirety of Oregon’s housing need. This will bring forward discussions on the major implementation issues identified in the previous biennium, as well as continued direction and
feedback on the spectrum of possible policy options. The project team will be engaging impacted communities across the state through outreach with community-based organizations, regional housing policy workgroups, local governments, and the statewide representation of members of the Working Group.

A) The Working Group

The Working Group, composed of 19 members with a variety of geographic and professional perspectives, interests, and expertise, is a significant partner in the OHNA Implementation process, providing expert advice and opinions on the best path to achieve the legislative intent for housing modernization. They will be assembled at key inflection points to hear the stories and insights from the engagement process and bring their organizations’ perspectives and critical thinking to policy development.

Meetings with the Working Group have begun, and there will be a total of seven meetings from October 2021 to December 2022. Members are listed below.

- Al Johnson, unaffiliated
- Allan Lazo, Fair Housing Council of Oregon
- Ariel Nelson, League of Oregon Cities
- Carla Palandino, City of Medford
- Dwight Jefferson, City of Portland
- Jill Rolfe, City of Coos Bay
- Katrina Holland, JOIN
- Khanh Le, Unite Oregon
- Jeremy Rogers, Oregon Association of Realtors
- Mallorie Roberts, Association of Oregon Counties
- Mark Long, Oregon Home Builders Association
- Mary Kyle McCurdy, 1000 Friends of Oregon
- Mary Phillips, City of Gresham
- Michael Szporluk, Disability Rights Oregon
- Miranda Bateschell, City of Wilsonville
- Nick Sneed, City of Madras
- Renata Wakeley, Mid-Willamette Valley Council of Governments
- Reyna Lopez, Pineros y Campesinos Unidos del Noroeste
- Tamra Mabbott, Morrow County
- Taylor Smiley Wolfe, Home Forward
- Ted Reid, Metro

B) Direct Engagement

The project team envisions a two-touch engagement process to solicit input from key stakeholders as the recommendations are being developed, and then report back for feedback and reflection on the proposed recommendations advanced to the Legislature.

How input and feedback will be used: Information, ideas, and concerns gathered from the Direct Engagement process will be compiled and analyzed, shared with the Working Group to ground their discussions, and ultimately used by the project team (DLCD, OHCS, and the consultant team) to draft recommendations for the Legislature.
Phase 1 (Spring/Summer 2022)
In spring and summer 2022, the project team, along with DLCD and OHCS, will implement a statewide stakeholder engagement process with key stakeholders and partners identified in previous processes. This engagement process will build on the engagement conducted in the previous biennium and discuss the implications of the potential changes to Oregon’s current housing planning system (as outlined in *Meeting Oregon’s Housing Needs: Next Steps for Equitable Housing Production*). The engagement will provide direction and input for the project team and Working Group as it builds out the Legislative recommendations report on how to implement the OHNA. Specific implementation issues will likely fall into the categories below:

- Affordable, fair, and equitable housing outcomes
- A system of shared responsibility
- Realistic and productive accountability
- Directing and coordinating resources
- Region-specific issues
- State capacity to administer the OHNA

DLCD and OHCS will host open-invitation informational forums where interested stakeholders can drop in to learn about the OHNA, the purpose of the project, the implementation process, and potential implementation options. DLCD and OHCS will also connect directly with individuals and small groups (such as member organizations, housing policy committees, etc.) to facilitate in-depth conversations on specific implementation issues. The project team will be kept apprised of all department-led engagement to ensure that stakeholder input and feedback are centralized.

In addition, the project team engagement lead (Kearns & West) will coordinate and facilitate up to eight focus groups with additional stakeholders and community-based organizations. The focus groups will likely draw from:

- The Working Group
- Oregon Housing Alliance member organizations
- Affordable housing developers/providers/service systems
- Land use planning and housing policy staff
- Fair housing and equity-focused organizations
- Community-based organizations
Phase 2 (Fall 2022)
The second touchpoint will occur when the legislative recommendations have been drafted. The project team engagement lead will host several listening sessions to re-engage stakeholders and focus groups participants from Phase 1. The listening sessions are intended to close the feedback loop. Stakeholders can hear how their input was used to draft the recommendations, and they can also provide feedback and offer suggested refinements on the draft recommendations. Findings from this process will be shared with the Working Group and full project team as the recommendations move into adoption.

This phase of engagement will help to identify potential implementation challenges from stakeholders and housing/land use practitioners, and to understand where refinements might be needed (in the bill language or in rulemaking processes). This phase of engagement will also be helpful to build support in advance of the legislative process.

Timeline

Engagement for the near-term policy development process is expected to continue through December 2022 when the Legislative recommendations report is finalized (see schedule below).
### Legislative Reports
- **Legislative Concept (LC) Development Begins**
- **Interim Report (2/1)**
- **LC Proposals Due to DAS**
- **DAS submits to Legislative Counsel for drafting**
- **LC Revision Requests Due**
- **Final Report (12/31)**

### Key Legislative Dates
- Short Session
- General Session

### Land Conservation and Development Commission
- Update
- Short Session Update
- Review Engagement and Key Insights
- Review Final Report and Legislative Recommendations

### Project Phases
- **Procurement / Scoping**
- **Exploration**
- **Stakeholder Engagement / Develop Recommendations**
- **Advance for Adoption**

### RHNA Working Group
- **Working Group Meeting**
- Recruitment: 10/28, 12/9, 4/21, 6/16, 8/18, 10/20, 12/8
- Draft, Final, Test Approaches, Refinements

### Long-Term Engagement Recommendations (HRAC)

### Housing Policy Research (UO)
Longer-Term Engagement

While this engagement framework document focuses on that needed to develop the near-term policies for the recommendations report to the Legislature in fall 2022, it will require coordination and collaboration with the longer-term engagement needed to carry out the policies.

DLCD has partnered with the Homelessness Research and Action Collaborative (HRAC) at Portland State University to study and develop recommendations to embed continuing engagement with local communities that result from this OHNA Implementation process. This part of the engagement work is expected to begin in spring 2022 and will focus on communities of color, federal/state protected classes, and other communities disproportionately affected by historic policies.

The goal of this work is to build ongoing engagement systems into the OHNA to ensure that community voices, input, and feedback are embedded in the structure and framework of any new system developed. HRAC proposals to embed engagement in the OHNA may include suggestions like the following:

- Recommendations on engagement methods to pilot or implement in the new structure,
- Recommendations to delineate different engagement methods at various levels of government,
- Recommendations on how to incorporate engagement in accountability measures,

DLCD anticipates using HRAC recommendations in both the implementation of any new OHNA program, as well as in future projects led by the agency and in partnership with local and regional governments.