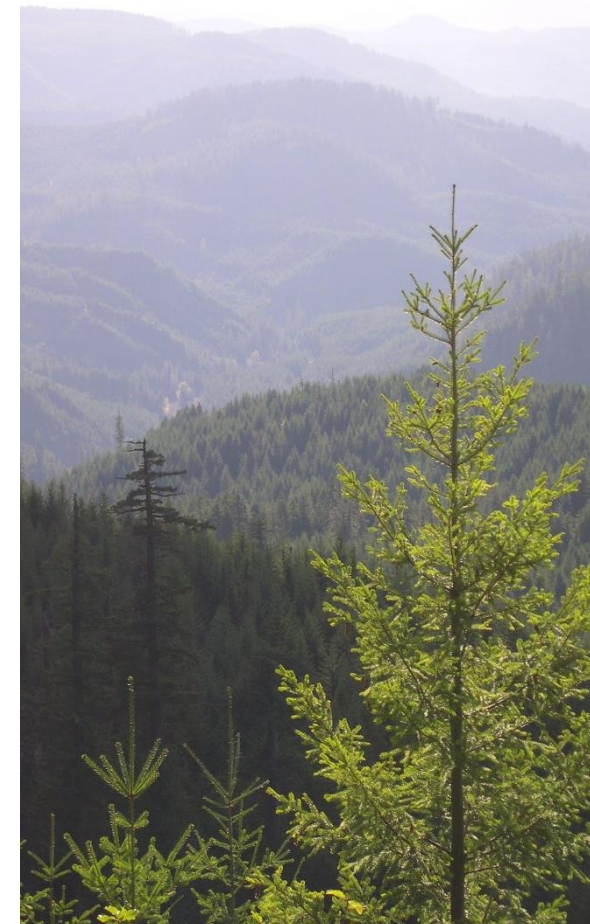




# Oregon Housing Needs Analysis (OHNA)



January 29, 2025 – House Committee on Housing and Homelessness

Carl Riccadonna, Chief Economist, DAS OEA

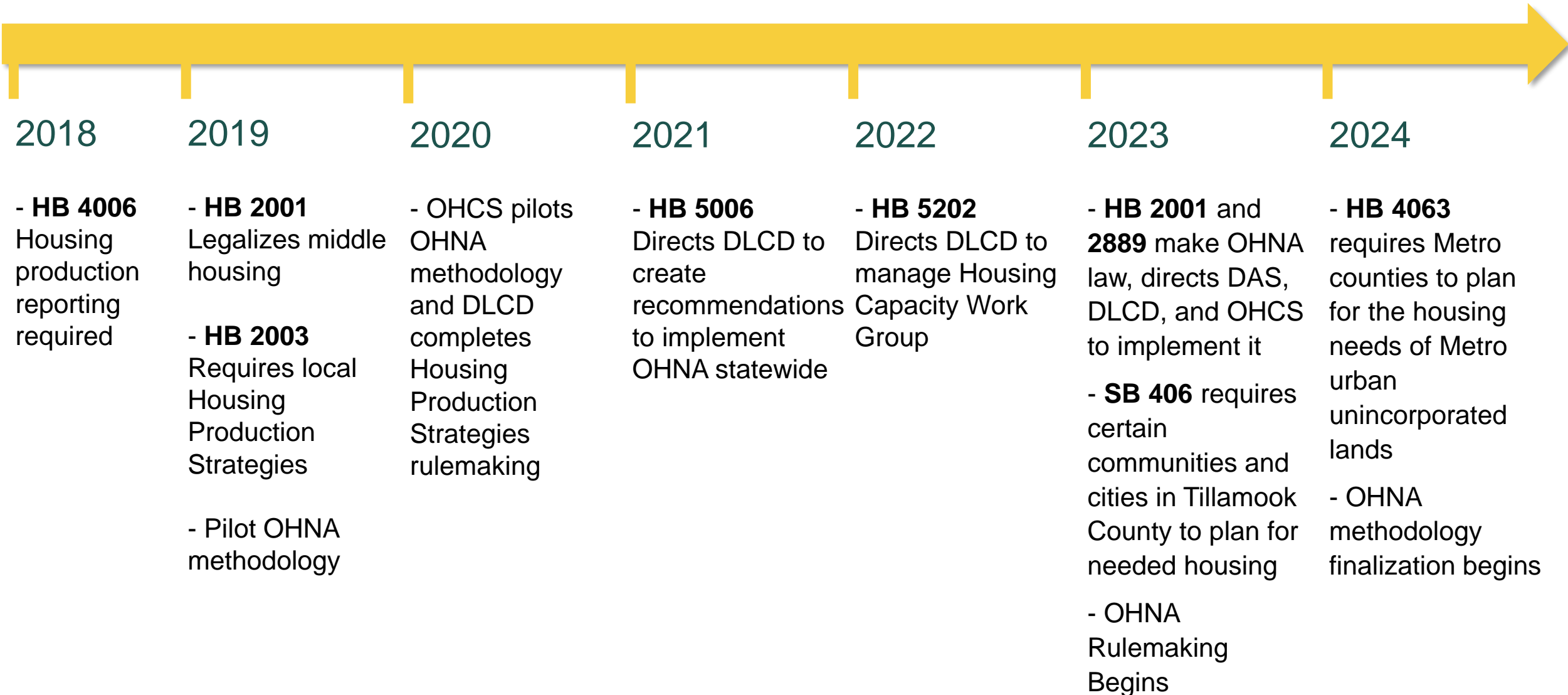
Ethan Stuckmayer, Housing Division Manager, DLCD

Aurora Dziadul, Legislative and Policy Analyst, DLCD

# What is the Oregon Housing Needs Analysis (OHNA)?

- Oregon Housing Needs Analysis (OHNA) is a comprehensive reform to the state's housing planning program
- OHNA changes the way cities estimate need and plan for:
  - Housing (Statewide Planning Goal 10)
  - Urban Growth Boundaries (Statewide Planning Goal 14)
- Reduces local analytical burden, provides data and information for local decision-making
- Directs focus of local governments towards taking actions within their control to affirmatively further fair housing and to facilitate greater housing production, affordability, and choice

# OHNA Legislative History and Directives



# Update on Rulemaking and Implementation

- ✓ DLCD is halfway through rulemaking process
- ✓ DAS published methodology and inaugural housing production targets and needed housing allocations
- ✓ OHCS published housing production and equity indicator dashboards

## By December 31, 2024:

- 2 of 3 sets of DLCD rules
- Dashboards
- Methodology/Results

## By December 31, 2025:

- 3<sup>rd</sup> set of rules

## Beyond 2025

- Guidance, Tools, Resources

# Goal 10 Under OHNA



Goal 10 applies to all cities in the state\*

\* - cities with population 10,000 or greater, Portland Metro Counties, and named jurisdictions within Tillamook County (SB 406, 2023) have expanded obligations under OHNA

# Goal 10 Under OHNA

## Determine Housing Need

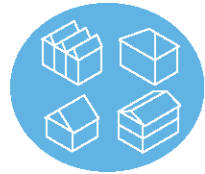
Oregon Housing Needs Analysis (OHNA)



Estimate & Allocate Need



Contextualized Housing Need



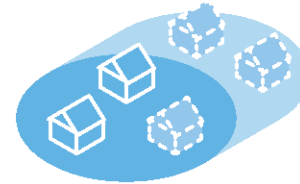
Determine Type, Characteristics & Location

**The Goal 10 Process**

State | Local

## Local Actions Respond to Need

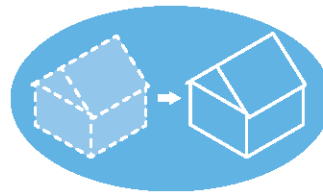
Housing Capacity Analysis



Assess Land Capacity & Development Readiness

Accommodate Needed Housing

Housing Production Strategy



Promote Needed Housing



Affirmatively Further Fair Housing

## Track and Monitor Progress

Local Housing Reporting



Report on Progress & Outcomes

Housing Production Dashboard



Evaluate Barriers to Production

# Oregon Housing Needs Analysis Components

Needs & Production	Housing Acceleration	Capacity & Urbanization
<ul style="list-style-type: none"><li>• Contextualize “needed housing”</li><li>• Integrate ‘affirmatively furthering fair housing’ into Goal 10</li><li>• Create adoption-ready policy options</li></ul>	<ul style="list-style-type: none"><li>• Measure (under)performance</li><li>• Develop process to review local/state barriers to production</li><li>• Create tools &amp; incentives for meaningful action to address barriers</li></ul>	<ul style="list-style-type: none"><li>• Clarify methodologies &amp; assumptions to estimate capacity</li><li>• Create greater certainty in UGB amendments, land exchanges, &amp; urban/rural reserves</li><li>• Facilitate development-readiness of lands within UGB</li></ul>

*DLCD provides technical assistance and grant funding (\$3.5m per biennium) to cities for each of these components*



# DAS Office of Economic Analysis: OHNA Methodology

- **20-year housing need**
  - Existing need (#s 1, 2)
  - Future need (#s 3, 4, 5)
- Allocated to regions and cities\*
- Production targets for cities

\*Metro calculates its own housing need and DAS allocates that to Metro jurisdictions

## Five Components of Housing Need

**1**  
Underproduction



Units that have not been produced to date in the region, but are needed to accommodate current population (often referred to as housing shortage)

**2** Units to  
Address  
Homelessness



Units needed to house those who are currently experiencing homelessness

**3**  
Projected Need



Units needed to accommodate future population growth over 20 years

**4** Units  
Lost to 2nd &  
Vacation Homes



Units needed to replace units lost to second and vacation homes

**5**  
Demographic  
Change



Units needed to account for changing demographics and household sizes

Calculated for the state, each region, and each income level



## DISTRIBUTION OF UNITS BY PERCENTAGE OF AREA MEDIAN INCOME





# Final Statewide Results by Income Level

Income Level	Current Need		Future Need			
	Underproduction	Units for Homelessness	Second & Vacation Homes	Demographic Change	Pop. Growth	Total Needs
0-30%	15,049	35,287	-	17,377	29,818	97,529
31-60%	16,630	8,221	-	22,683	38,840	86,373
61-80%	7,953	2,129	-	15,616	27,292	52,990
81-120%	7,368	-	11,370	27,572	48,329	94,638
>120%	3,301	-	5,930	55,938	97,803	162,972
Total	50,300	45,637	17,300	139,185	242,081	494,503

# Final Results By Region and Income Level

Region	Income Level					Total Need
	0-30%	31-60%	61-80%	81-120%	>120%	
Central	8,151	8,568	6,853	12,759	22,071	58,401
Metro	31,034	32,156	20,591	36,566	67,929	188,276
Northeast	3,598	3,230	2,088	4,458	6,593	19,966
Northern Coast	4,554	3,364	1,350	3,450	3,574	16,292
Southeast	3,088	2,308	1,290	2,242	3,667	12,594
Southwest	13,200	11,002	6,476	10,724	21,150	62,551
Willamette Valley	33,905	25,746	14,342	24,440	37,989	136,421
Oregon	97,529	86,373	52,990	94,638	162,972	494,503



**DLCD**

Department of  
Land Conservation  
& Development

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Please direct additional questions for DLCD to Aurora Dziadul at

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[meliah.masiba@dlcd.oregon.gov](mailto:meliah.masiba@dlcd.oregon.gov).

**Thank you!**  
**Questions?**