

**OREGON**

Department of  
Land Conservation  
& Development



## Oregon Housing Needs Analysis (OHNA) Update

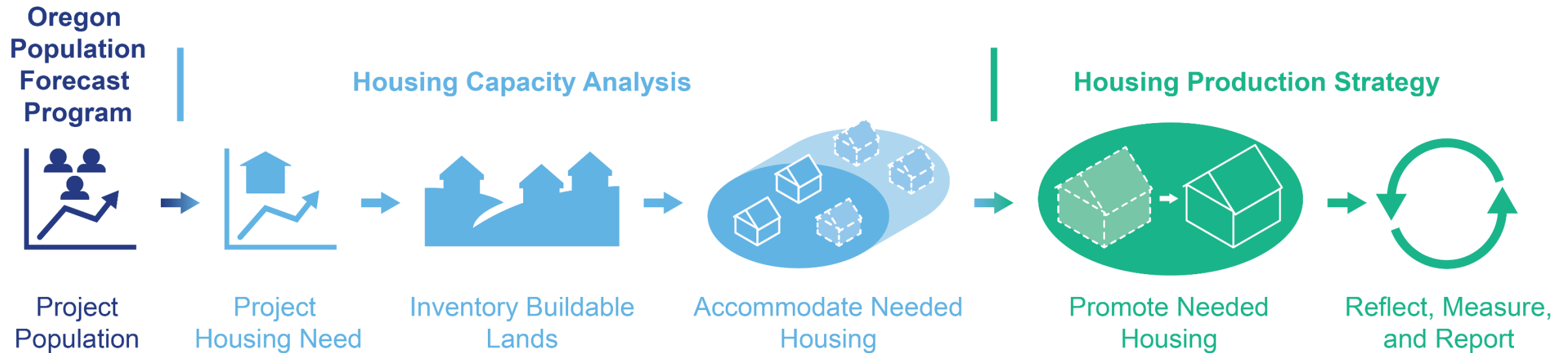
Land Conservation and Development

Karen Guillén-Chapman

September 29, 2025

# Goal 10 – Housing Planning (Pre-OHNA)

***“To provide for the housing needs of citizens of the state. Buildable lands for residential use shall be inventoried and plans shall encourage the availability of adequate numbers of needed housing units at price ranges and rent levels which are commensurate with the financial capabilities of Oregon households and allow for flexibility of housing location, type and density.”***



# Goal 10 – Housing (OHNA Policy)

## Determine Housing Need

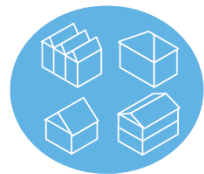
- **State Actions**
- **Local Actions**

Oregon  
Housing Needs  
Analysis (OHNA)



Estimate &  
Allocate Need

Contextualized  
Housing Need



Determine Type,  
Characteristics & Location

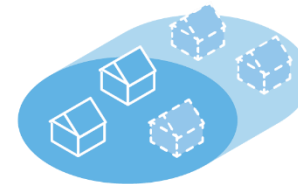
## Local Actions Respond to Housing Need

### The Goal 10 Process

Housing Capacity Analysis

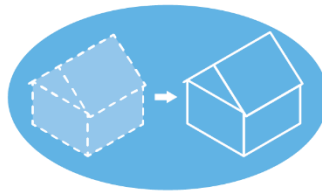


Assess Land Capacity &  
Development Readiness



Accommodate Needed  
Housing

Housing Production Strategy



Promote Needed  
Housing



Affirmatively Further  
Fair Housing

## Track and Monitor Progress

Housing  
Dashboards



Report on Progress  
& Outcomes

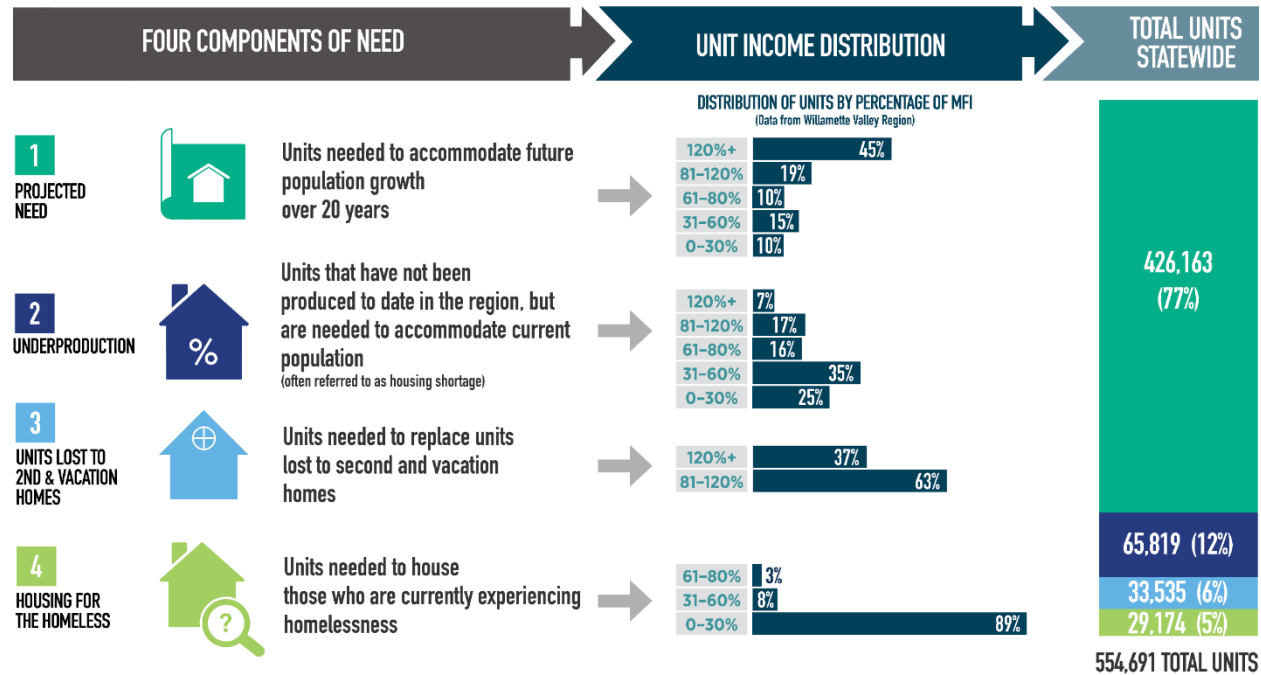
Housing  
Acceleration  
Program



Evaluate Barriers  
to Production

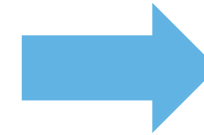
# Define “Needed Housing”

## State-led estimate of need (OHNA)

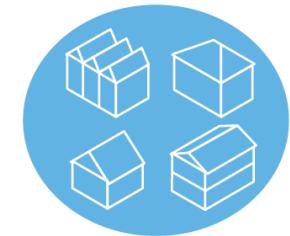


## Locally-led determination

Need allocated to local governments



**Needed Housing**



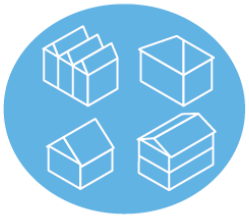
Determine Type, Characteristics & Location



# Housing Capacity Analysis (HCA)

*Does a city have enough land, zoned to sufficient capacity, within an Urban Growth Boundary (UGB) to accommodate twenty years of need?*

Needed Housing



Buildable Lands Inventory



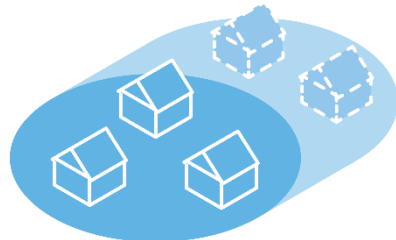
If deficiency is identified:



Efficiency Measures



Urban Growth Boundary Adjustment



State Analysis:

1. **OHNA** – Estimates and allocates need to local governments, first round completed for 2025.

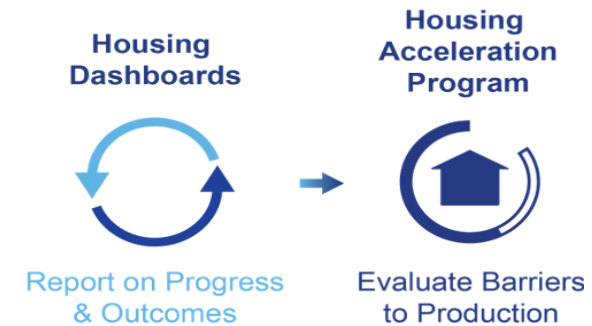
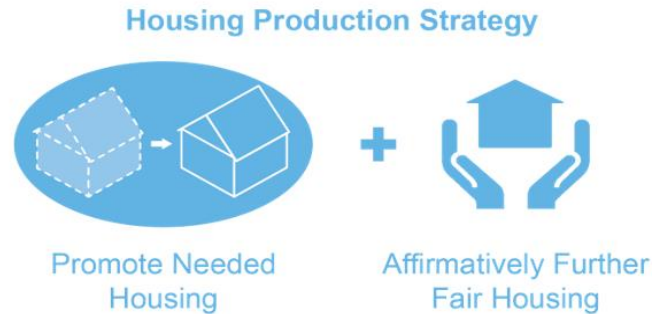
Local Planning:

2. **“Needed Housing”** – Determine type, characteristics, and location of housing
3. **Buildable Lands Inventory (BLI)** – Inventory and estimate land capacity and development-readiness

If land deficiency is identified:

4. **Measures to Accommodate Needed Housing**

# Housing Production Strategy (HPS) and Acceleration Program



## HPS Requirements:

1. **Contextualized Housing Need** – Evaluation of housing need and identification of fair housing issues informed by community members
2. **Strategy to Address Need** – Plan of actions that address need and resolve fair housing issues informed by housing developers and service providers

## Housing Acceleration Program Elements:

1. **Referral** - For low production performance or non-compliance with HPS program
2. **Audit** – Department, city, and community partnership to identify barriers to production
3. **Acceleration Agreement**– Plan of local actions to address persistent barriers within city's control and with state support

# OHNA Rulemaking Amended Scopes

## Capacity & Urbanization

- Clarify methodologies & assumptions to estimate capacity
- Create greater clarity/certainty for UGB amendments, land exchanges, & urban/rural reserves
- Facilitate development-readiness of lands

## Housing Actions Work Group

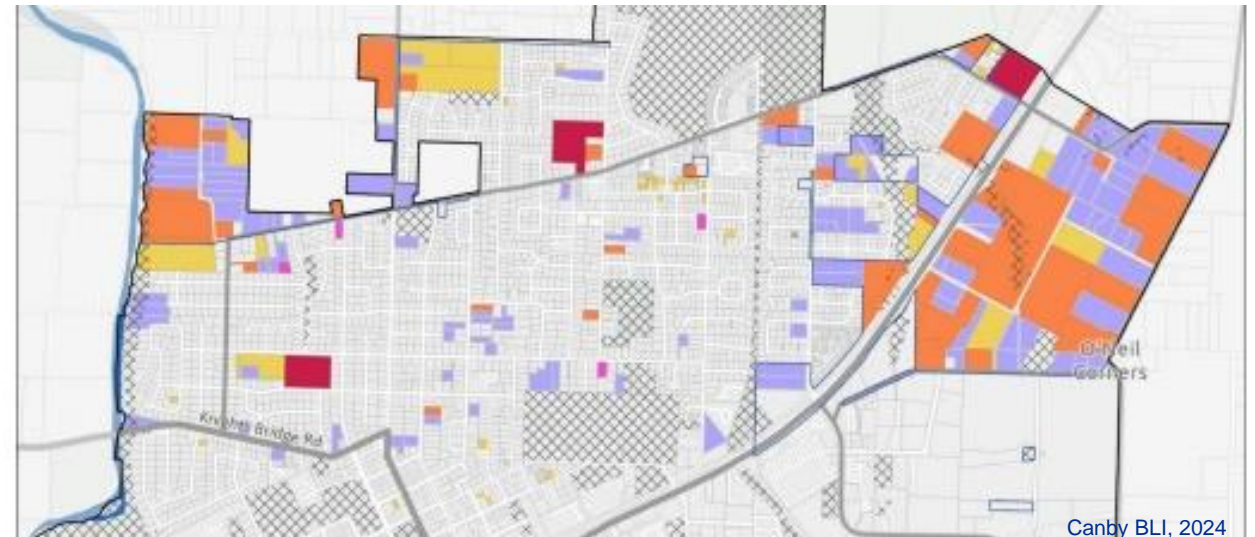
- Develop adoption-ready actions, including model codes, that affirmatively further fair housing
- Develop compliance pathways through Housing Production Strategy and Acceleration Programs
- Develop guidance including OHNA Goal 10 Guidebook & revamp of HPS Menu of Actions

## DIVISION 8

# Housing Capacity Analysis

BLI methods, discounting  
capacity land and LUEMs

- Define “Partially Vacant Land”
  - **Provide a safe harbor** for identifying and inventorying
- Option for a land market supply factor to discount the capacity of some buildable land unlikely to develop over the planning period
  - **Provide a safe harbor** for discount
- Define “Land Use Efficiency Measure”
  - **Provide a safe harbor** for "what is enough"





## DIVISIONS 8 & 24

# Coordination of Public Facilities

Development readiness &  
feasibility of urban growth



## Development-Ready Land in the UGB (Div. 8)

- Clarifying the statutory definition of “development-ready land”
- Determining how development-ready land will be quantified

## UGB Study Areas (Div. 24)

- Increase clarity in balancing of sub-areas for consideration
- Require time-certain updates to utility planning, Goal 11 Public Facilities Plan project lists to provide more value to extensive engineering analysis

DIVISION 24

# Urban Growth Boundary Expansions

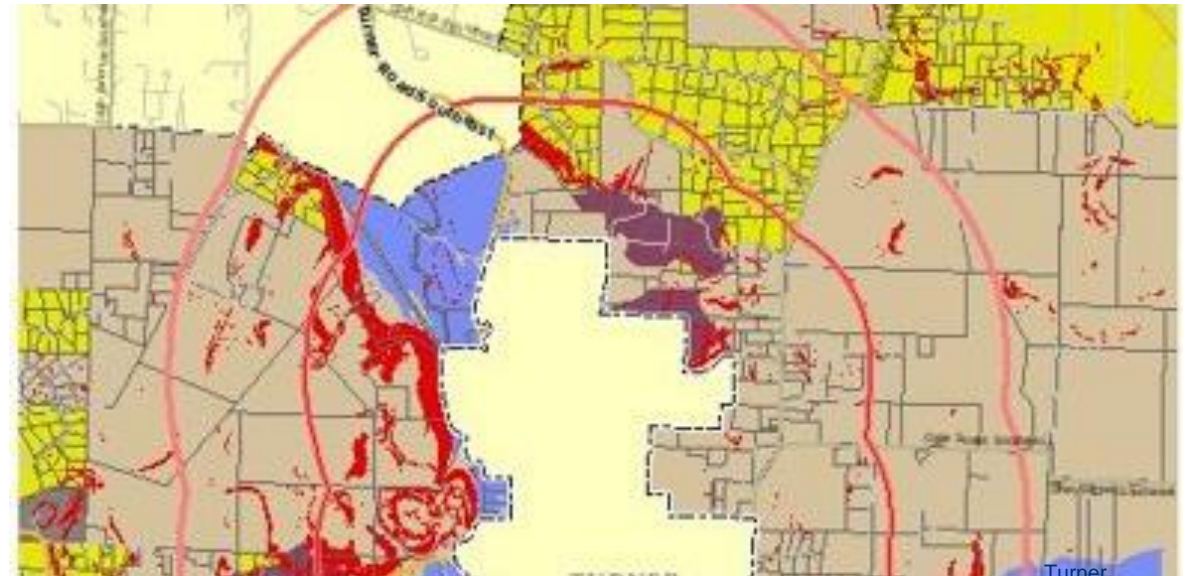
Establishing the Study  
Area & Balancing Location  
Factors

## Setting the Study Area

- Excluding land from the study area due to:
  - **Impracticability to be served** by public facilities
  - Natural resource and hazard **constraints**

## Balancing the Goal 14 Location Factors

- Discounting capacity of parcelized land; and
- Coordination of public facilities, including relative cost comparison among sub-areas



DIVISION 24

# Urban Growth Boundary Exchanges

- Allowing **constrained land** within the UGB to be **swapped for buildable land** outside of the UGB when the amount of acreage added is equivalent, and
- Allowing **added land to be designated at higher residential densities** than the land being removed from the Growth Boundary.
- Clarifying the application of “**substantially equivalent**” as a **10% margin**.



Senate Interim Committee on Housing and Development

September 29, 2025

# Questions from the Committee