Council work session agenda

Metro
600 NE Grand Ave.
Portland, OR 97232-2736

Tuesday, December 2, 2025 **10:30 AM** **Metro Regional Center, Council Chamber; https://zoom.us/j/615079992 (Webinar ID: 615079992) or 253-205-0468 (toll free), https://www.youtube.com/watch?v=XUlBeXRD_24**

Work session will begin at 10:30 a.m. Agenda item times are estimated and the order of items may be subject to change.

This meeting will be held electronically and in person at the Metro Regional Center Council Chamber.
You can join the meeting on your computer or other device by using this link: https://zoom.us/j/615079992 (Webinar ID: 615 079 992)

10:30 Call to Order and Roll Call

10:35 Work Session Topics:

10:35 Metro's State Mandated Regional Housing Coordination Strategy: Final Draft — 25-6332

Presenter(s): Eryn Kehe (she/her), Urban Policy and Development Manager
Emily Lieb (she/her), Housing Department Policy Director

Attachments:
- Staff Report
- Attachment 1 - Draft Resolution No. 25-5535
- Attachment 2 - Executive Summary (November 2025)
- Attachment 3 - Regional Housing Coordination Stragegy (Draft)
- Attachment 3.1 - Socioeconomic and Demographic Characteristics
- Attachment 3.2 - Opportunity Maps
- Attachment 3.3 - Market Conditions and Barriers to Housing Develo
- Attachment 3.4 - Evaluation of RHCS Actions
- Attachment 3.5 - Past Actions Taken by Metro
- Attachment 3.6 - Equitable Engagement Summary
- Attachment 3.7 - Full List of Strategy Ideas

11:20 Housing Production Acceleration Strategies — 25-6356

Presenter(s): Malu Wilkinson (she/her), Deputy Director, Planning, Development and Research
Hau Hagedorn (she/her), Community Investment Manager

Attachments: Staff Report

12:05 2026 State Legislative Agenda 25-6338

Presenter(s): Anneliese Koehler (she/her), Legislative Affairs Manager
Kyung Park (he/him), State Affairs Advisor

Attachments: Staff Report
Attachment 1 - 2026 Legislative Principles (DRAFT)
Attachment 2 - 2026 Metro Legislative Priorities (DRAFT)
Attachment 3 - Speculative Ticketing Issue Sheet
Attachment 4 - Transportation Issue Sheet
Attachment 5 - Housing Stability Issue Sheet
Attachment 6 - Serial Communications Issue Sheet
Attachment 7 - Food and Beverage Issue Sheet

12:50 Chief Operating Officer Communication

12:55 Councilor Communication

1:00 Adjourn

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ការគោរពសិទ្ធិពលរដ្ឋរបស់ ។ សំរាប់ព័ត៌មានអំពីកម្មវិធីសិទ្ធិពលរដ្ឋរបស់ Metro ឬដើម្បីទទួលពាក្យបណ្តឹងរើសអើងសូមចូលទស្សនាគេហទំព័រ www.oregonmetro.gov/civilrights។ បើលោកអ្នកត្រូវការអ្នកបកប្រែកាសនៅពេលអង្គប្រជុំសាធារណៈ សូមទូរស័ព្ទមកលេខ 503-797-1700 (ម៉ោង 8 ព្រឹកដល់ម៉ោង 5 ល្ងាច ថ្ងៃធ្វើការ) ប្រាំពីរថ្ងៃថ្ងៃធ្វើការ មុនថ្ងៃប្រជុំដើម្បីអាចឲ្យគេសម្រួលតាមសំណើរបស់លោកអ្នក ។

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January 2021

Agenda #: 2.1

File #: 25-6332 **Agenda Date:**12/2/2025

Metro's State Mandated Regional Housing Coordination Strategy: Final Draft

Eryn Kehe (she/her), Urban Policy and Development Manager
Emily Lieb (she/her), Housing Department Policy Director

METRO'S STATE-MANDATED REGIONAL HOUSING COORDINATION STRATEGY: FINAL DRAFT

Date: November 13, 2025
Departments: Planning, Development and Research; Housing
Meeting Date: December 2, 2025

Prepared by: Laura Combs, Associate Regional Planner, laura.combs@oregonmetro.gov
Presenter(s): Eryn Kehe (she, her); Emily Lieb (she/her)
Length: 45 minutes

ISSUE STATEMENT

As a part of the Oregon Housing Needs Analysis legislation, the State of Oregon requires that Metro complete a Regional Housing Coordination Strategy (RHCS) by the end of 2025. A project team made of staff from both the Housing and Planning, Development and Research departments have completed the public comment draft RHCS, which proposes a list of actions that Metro will undertake to promote housing production, affordability, and choice. At this final Council work session, the project leads will describe final revisions to the RHCS based on the key takeaways from the public comment period and present the recommendation from MPAC. Councilors can ask questions and provide direction on finalizing the RHCS for adoption.

The goal of the RHCS is to create a roadmap of actions Metro will advance to promote housing production, coordination, and access by lifting up best practices, coordinating and aligning local strategies and addressing critical gaps that can be filled at the regional level. By statute, the list of actions in the RHCS must address the following:

- The development and maintenance of diverse housing types that are high-quality, physically accessible and affordable
- Housing with access to economic opportunities, services and amenities
- Strategies, policies, or actions that are coordinated among the local governments within the Metro region
- Actions that affirmatively further fair housing

The proposed list of actions was informed by engagement with jurisdictional partners and other interested groups. This RHCS creates opportunities for alignment within Metro's existing body of work and builds on initiatives already underway that promote housing production and access in greater Portland.

ACTION REQUESTED

Metro Council will receive the recommendation from MPAC and review the final revisions to the RHCS based on feedback from the public comment period. Council will be asked to instruct staff on any final adjustments needed before the Resolution to approve the RHCS returns to Council in December for a vote.

IDENTIFIED POLICY OUTCOMES
In a subsequent public meeting in December 2025, the Council will have the opportunity to adopt a Resolution to approve the final RHCS. The Metro Council may consider the MPAC recommendation in their decision. If approved, Metro expects to implement the Strategy's actions over the next six years.

POLICY QUESTION(S)
- Is the final RHCS ready for approval at your next meeting?
- Does the Council have comments on implementation of strategy actions?

POLICY OPTIONS FOR COUNCIL TO CONSIDER
The Council may provide staff with direction on:
- Finalizing the RHCS

STAFF RECOMMENDATIONS
Staff updated the draft strategy based on feedback from the public comment period that resulted in sixteen actions for Council review. Staff recommend that the Council provides final instruction on any necessary adjustments to the strategy before the next meeting to vote on Resolution 25-5535.

STRATEGIC CONTEXT & FRAMING COUNCIL DISCUSSION
The Oregon Housing Needs Analysis (OHNA) articulates new responsibilities for state agencies and local governments to reorient the implementation of Statewide Land Use Planning Goals 10 (Housing) and 14 (Urbanization) to produce more housing, increase equitable access to housing and ensure that state and local governments take action to address need. It affects the way all communities plan housing and urban lands, and cities and unincorporated counties with populations of 10,000 or greater are now required to regularly plan and take action to address needs. These cities and counties in the Metro area will develop and implement a Housing Production Strategy every six years to promote needed housing and affirmatively further fair housing.

As the regional government, Metro will produce a Regional Housing Coordination Strategy (RHCS) by the end of 2025 which focuses on coordination amongst the area's jurisdictions instead of direct production.

BACKGROUND
The RHCS project team discussed the preliminary list of actions and results from the evaluation framework at the previous work session on July 29, 2025. Prior to this meeting, the May 20 work session covered Metro's roles in housing and preliminary action ideas. A previous work session in February covered the project scope of work and engagement plan.

ATTACHMENTS
1. Draft Resolution No. 25-5535
2. Executive Summary (November 2025)
3. Regional Housing Coordination Strategy (Final Draft)
   3.1. - 3.8. Appendices

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF ADOPTING THE 2025 REGIONAL HOUSING COORDINATION STRATEGY	)))))	RESOLUTION NO. 25-5535 Introduced by Chief Operating Officer Marissa Madrigal in concurrence with Council President Lynn Peterson

WHEREAS, the State of Oregon has implemented the Oregon Housing Needs Analysis (OHNA) program to encourage the production of housing that meets the needs of current and future households; and

WHEREAS, the OHNA program requires Metro to adopt a regional housing coordination strategy no later than one year after the deadline for completing a housing capacity determination under ORS 197A.350; and

WHEREAS, on December 5, 2024, the Metro Council adopted the 2024 Urban Growth Report via Ordinance No. 24-1520, thereby completing its statutorily required housing capacity determination; and

WHEREAS, according to the schedule adopted by the Oregon Land Conservation and Development Commission, Metro must adopt the 2025 Regional Housing Coordination Strategy by December 31, 2025; and

WHEREAS, Metro has undertaken extensive engagement with local jurisdictions, housing providers, developers, and a variety of interest groups and housing experts to identify barriers to housing production and actions for possible inclusion in the 2025 Regional Housing Coordination Strategy; and

WHEREAS, on September 15, 2025, Metro released a draft 2025 Regional Housing Coordination Strategy for public review by interested parties; and

WHEREAS, Metro held a public comment period on the draft Regional Housing Coordination Strategy from September 15, 2025 through October 15, 2025; and

WHEREAS, the Metro Committee on Racial Equity discussed the 2025 Regional Housing Coordination Strategy on two occasions, providing staff with feedback on a preliminary list of actions and the framework for evaluating actions; and

WHEREAS, the Metro Technical Advisory Committee discussed the Regional Housing Coordination Strategy on six occasions and provided recommendations to the Metro Policy Advisory Committee; and

WHEREAS, the Metro Policy Advisory Committee discussed the Regional Housing Coordination Strategy on six occasions and recommends that the Metro Council adopt the 2025 Regional Housing Coordination Strategy; and

WHEREAS, the 2025 Regional Housing Coordination Strategy addresses the requirements specified in ORS 197A.365; now therefore

DRAFT

BE IT RESOLVED that the Metro Council adopts the 2025 Regional Housing Coordination Strategy attached to this resolution as Exhibit A.

ADOPTED by the Metro Council this 18th day of December 2025.

Lynn Peterson, Council President

Approved as to Form:

Carrie MacLaren, Metro Attorney

DRAFT

Regional Housing Coordination Strategy: Executive Summary

The causes of the housing crisis that greater Portland faces are entrenched and complex, requiring a response that is both urgent and robust. Market conditions, zoning limitations and other obstacles have resulted in years of underproduction across both regulated affordable housing and market-rate housing. The result is a severe housing shortage that has driven up consumer costs and pushed more people into unstable living situations. Direct consequences of this housing shortage have become ubiquitous: more than a thousand evictions are filed each month, homelessness is rising and highly visible across many communities, and disparities among who can and cannot afford housing continue to grow. But with a collaborative regional approach, Metro has identified pathways to creating more housing of all types and at all price points.

Demographic shifts such as an aging population, an increase in smaller, one-and-two-person households, and an increase in rent-burdened households mean that a broader variety of homes is needed. More deeply affordable, accessible and family-sized rental units are needed, as is a broader range of homeownership opportunities. Additionally, coordination and alignment across housing and homeless services systems must improve to ensure that individuals and families exiting homelessness are able to access housing that is designed and operated to meet their needs.

While housing production in greater Portland picked up after the Great Recession, it never fully caught up with population growth and today it is slowing again. Market conditions, including high costs for labor, materials, land and borrowing, as well as negative perceptions of the region among outside investors, continue to depress housing production. These dynamics have particularly hampered the production of large, complex projects like apartment developments. Additionally, the new pipes, roads, parks and schools that are needed to support housing growth push housing prices up even more.

Local governments have responded. Some have reformed zoning to allow for a greater variety of housing types and these changes have begun to show results. But more work is needed to overcome the unprecedented challenges facing the housing market and to ensure that good intentions translate into real housing outcomes.

The regional affordable housing bond voters passed in 2018 serves as an example of where coordination has been effective. On track to provide 5,600 new affordable homes—1,700 more than initially projected—the bond has supported housing investments that are distributed evenly across the region rather than concentrated in the urban core.

These homes are also designed and operated in partnership with community organizations. In many cases, wraparound services funded through another regional measure, the supportive housing services tax, help to meet a range of needs. More than half of the bond-funded homes are sized for families, and about 40 percent are deeply affordable for households earning a third or less of the area's median income. However, with these bond dollars — and the Portland affordable housing bond dollars — almost completely spent, greater Portland is approaching an affordable housing production cliff.

Metro's current estimates show that greater Portland still needs 27,000 more homes to support its existing population and an additional 151,000 homes to keep up with forecasted population growth over the next 20 years. Meeting that overall need for 178,000 more homes will require the construction of an average of about 9,000 more homes every year. About two-thirds of those homes need to be affordable for households with low or very low incomes. Overcoming these challenges will require sustained leadership, collaboration among every level of government, and a collective commitment to building more homes of all types and at all income levels.

The Regional Housing Coordination Strategy provides an overview of the region's housing shortage and the barriers that are impacting housing production. It also provides a summary of results from engagement and the evaluation that Metro conducted to identify and prioritize recommended actions that Metro will undertake to address the shortage.

Regional Housing Coordination Strategy background

Directed by new requirements under the Oregon Housing Needs Analysis (OHNA) program, jurisdictions around Oregon are developing Housing Production Strategies that are intended to address housing production targets set by the state.[1] Metro, with its unique role as an elected regional government, has a new responsibility under the OHNA program to adopt a Regional Housing Coordination Strategy (RHCS) every six years. This RHCS identifies the actions that Metro will take over the next six years to advance housing production, access to opportunity, affordability, and choice in greater Portland. These new actions build on Metro's long history of working to create thriving communities, and more recently, its success in large-scale affordable housing development and supportive housing services investments.

Consistent with the theme of coordination, two Metro departments — the Housing Department and the Planning, Development, and Research Department — collaborated to develop the RHCS. The actions identified in this RHCS reflect the diverse expertise and areas of focus of those two departments, the Metro Council's leadership, and extensive input from local jurisdictions, housing developers, owner/operators, and industry leaders, as well as coalitions and organizations engaged in housing advocacy.

Purpose of the RHCS

This strategy emphasizes Metro's critical role in advancing regional solutions and supporting the efforts of cities and counties in accelerating housing production. Though Metro does not zone land or build homes, Metro plays an important part in helping to create the conditions for success, addressing gaps in capacity and resources, and supporting coordination and alignment at the state and local level and across public,

[1] The state referenced Metro's 2024 Urban Growth Report assessment of housing needs when setting these targets for Metro area jurisdictions.

private and nonprofit sectors. This RHCS aims to encourage the production and preservation of housing that addresses the following goals, as defined in statutory language related to the OHNA:

- Diversity of housing types and affordability levels
- Housing that is high quality and physically accessible
- Housing with access to economic opportunities, services, and amenities
- Promotion of fair housing

Equity considerations

Equitable access to affordable, accessible, well-located housing is central to people's prosperity, stability and quality of life. This project worked to keep racial equity front and center throughout by applying Metro's Racial Equity Framework, in alignment with Metro's Strategic Plan to Advance Racial Equity, Diversity, and Inclusion. The Framework guided project scoping, data collection, engagement, identification of actions in this RHCS, and evaluation of those actions.

Engagement

Because this RHCS is intended to coordinate and support the work of other jurisdictions and partners, the actions included in this document were identified in close collaboration with an Implementers Work Group consisting of local planning and housing staff, focus groups with industry and community leaders, and Metro's standing committees, including the Metro Technical Advisory Committee (MTAC), the Metro Policy Advisory Committee (MPAC), and the Metro Committee on Racial Equity (CORE).

Types of actions in this RHCS

Actions included in this RHCS fall into several general categories, including:

- Communications and engagement
- Convening
- Data and analysis
- Emerging best practices and innovation
- Funding and investments
- Legislative advocacy
- Partnerships and collaboration
- Regulation and regional policies
- Technical assistance and capacity building

Next steps

The challenge of creating and sustaining housing options that meet the diverse needs, household configurations, and income levels of people in our region is too big for any single jurisdiction. Collective efforts are needed now more than ever. This RHCS provides a framework for regional coordination and collaboration to guide progress toward a future where all people have access to safe, affordable and stable housing. Once adopted by Metro Council, the RHCS will guide Metro's actions over the next six years (2026-2031). It will be followed by the development of more detailed work plans and continued engagement to further shape the work and ensure responsiveness to needs, opportunities and shared values.

New actions to be taken by Metro

	ID	Action	Impact on development of needed housing	Impact on housing affordability or choice
Accelerate housing production	1	Create a new **housing pre-development and technical assistance grant program** for site specific housing development. May include site surveys, feasibility studies, design, permitting, etc.	Low	Low
	2	Expand **resources available for brownfield assessment** and explore grant opportunities for small scale remediation that leads to middle housing and multi-family housing development**.**	Medium	Medium
	3	Funding and support for **local housing production strategy implementation**	Medium	Low
	4	Consider developing a **regional pool of housing professionals for technical assistance and staffing support** to smaller jurisdictions to support planning and implementation related to housing production, affordability and choice.	Medium	Low
Research and assessment	5	Evaluate lessons learned and effective practices from implementation of the 2018 Affordable Housing Bond; research models and best practices and develop and share recommendations with state and local funders to **strengthen fair housing and equitable access to affordable housing.** Incorporate recommendations into the implementation of any future Metro affordable housing funding implementation.	Low to none	Low to Medium
	6	Building upon lessons learned and best practices from the 2018 Metro Affordable Housing Bond and Metro's Transit Oriented Development (TOD) grant program, evaluate and advance opportunities to **strengthen requirements and incentives for community participation and co-design in the development and operations of Metro funded affordable housing**, to support the creation of housing that is designed and operated to be culturally responsive to the needs of historically marginalized populations. Identify opportunities for Metro to support capacity building for community based and culturally specific organizations to participate in affordable housing development and operations through future housing funding allocation and/or program requirements or criteria that incentivize partnerships that benefit community based and culturally specific organizations.	Low to none	Low to Medium
	7	Research, evaluate and identify opportunities to advance **innovative and non-LIHTC approaches to housing** development/construction, financing, and ownership that present **opportunities to reduce costs, diversify housing**	Medium	Medium

New actions to be taken by Metro

	ID	Action	Impact on development of needed housing	Impact on housing affordability or choice
		types, and strengthen outcomes for groups most impacted by housing instability. This research is intended to build upon previous Metro research and engagement in 2024 to evaluate affordable housing investment opportunities. The 2024 study scope included consideration of rental housing development gap funding, acquisition/conversion, preservation, and complementary investments such as land acquisition/banking, predevelopment funding, and operating support and risk mitigation, as summarized in Metro's report, Evaluation of Affordable Housing Investment Opportunities. Based on feedback collected through the 2024 engagement process as well as 2025 engagement related to the RHCS, Metro has identified additional areas of research/engagement related to future affordable housing funding opportunities. This action seeks to fill gaps in previously conducted research by exploring and evaluating areas of innovation not previously explored, including: • Modular and manufactured housing and cross-laminated timber and smaller or expandable designs • **Social housing and alternative ownership** models, including CLT and resident-owned multi-family housing models • Innovative financing approaches to support development and operations of **smaller scale (<20 unit) building types**, including PSH Assess barriers and identify opportunities to pilot or scale up innovative approaches; approach would include engagement with public, private, and philanthropic partners to support coordinated research, development and investment strategies.		
	8	Conduct an **assessment of middle housing** in the region to identify best practices and common barriers.	Low	Low
Convene and coordinate	9	Develop or support the development of a coordinated **affordable housing operational stabilization strategy** to respond to industry-wide challenges due to rising operational costs, increased resident needs, and lack of coordination/alignment with homeless and supportive services. This strategy will result in a coordinated set of concrete actions for Metro and state/local partners to take to address operational stabilization needs, potentially including but not limited to: adjustments or flexibility to established regulatory agreements, changes to policies	Medium	Medium to High

New actions to be taken by Metro

	ID	Action	Impact on development of needed housing	Impact on housing affordability or choice
		such as rental assistance payment standards, coordinated actions to address vacancies and streamlined referrals, and coordination to secure new funding for operational stabilization.		
	10	**Evaluate and improve voucher and other rental assistance policies and implementation** to address portability challenges, shifting market conditions impacting affordable housing, and to connect available vouchers with vacant regulated affordable housing units.	Low	Medium
New tools	11	Develop a centralized **regional affordable housing inventory and listing service** to support housing navigators and seekers in connecting with information about available affordable housing units that meet their needs across the region.	Low	Medium
	12	Develop a plan for a **regional land bank** that outlines the necessary legal framework, governance structures, and operational guidelines to support cross-sector collaboration and investment. Define clear policy priorities, including considerations related to Affirmatively Furthering Fair Housing, market conditions and funding opportunities.	Low	Low
	13	Explore how to create a **permitting dashboard** to track trends across the region.	Low	Low
Policy	14	Begin a Metro **Urban Growth Management Functional Plan audit and cleanup** of housing-related titles to align with new State requirements and regional priorities as identified in the 2027 Future Vision.	Low	Low
Funding and cross-sector collaboration	15	Convene jurisdictional partners to develop a **coordinated legislative agenda for state and federal housing/homelessness resources**, including a regional priority to identify funding for infrastructure. The agenda would be updated as needed to meet changing regional needs (or every six years) and guided by engagement with appropriate Metro advisory committees for land use, housing and homelessness, engagement with jurisdictions, and consultation with interested Tribes.	Medium to High	Medium

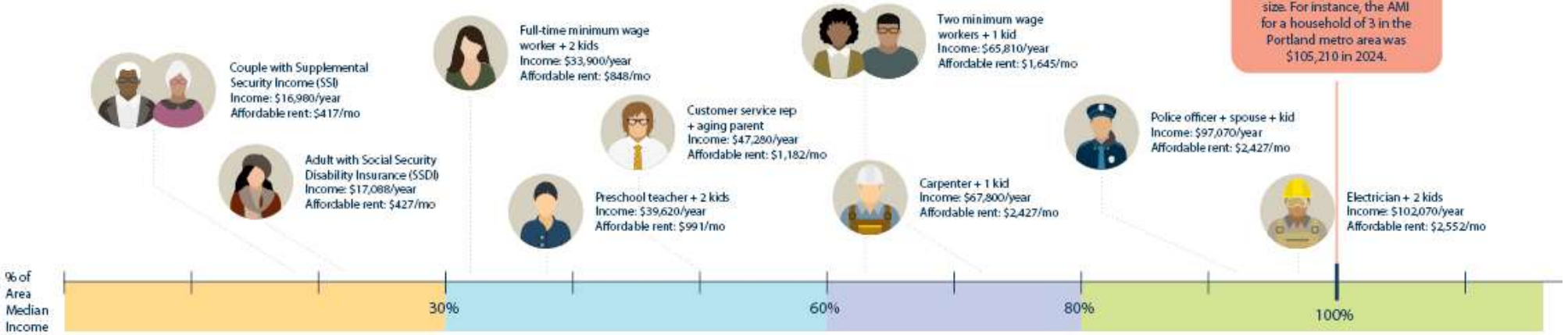
New actions to be taken by Metro

	ID	Action	Impact on development of needed housing	Impact on housing affordability or choice
	16	Consider the viability and feasibility of **new funding for affordable housing development and preservation**. Ensure that any new funding framework is informed by public opinion research and engagement with public, private and nonprofit leaders as well as analysis of housing needs and market conditions, and lessons learned from the 2018 regional housing bond and best practices from other regions, including evaluating opportunities to strengthen racial equity, fair housing and community resilience outcomes and alignment/integration with homeless and supportive housing services.	High	High

REGIONAL HOUSING COORDINATION STRATEGY

Connecting equitable housing strategies to resident needs

Metro is collaborating with regional partners to take new actions to advance housing production, affordability, and choice for families at different income levels.



0-30% AMI

The private market does not provide housing affordable at this level. Units require deep construction subsidies and ongoing operating support, such as rental assistance vouchers, to remain affordable. Many households also benefit from on-site support services, which require additional funding or resources.

30-60% AMI

The private market does not provide housing at this income level. Regulated affordable units require construction subsidies but can typically operate without ongoing rental vouchers.

60-80% AMI

The private market provides limited new rental housing in this range, generally smaller units such as studios and one- bedrooms. This group also relies heavily on older rental housing sotck that has "filtered" down to become more affordable.

80-120% AMI

The private market provides rental units in a wider variety of sizes at this income level. It also begins to offer limited ownership opportunities, primarily condominiums, though the vast majority of options remain rentals.

The RHCS actions listed here will be advanced over the next six years (2026-2031)

0-30% AMI

ACTION #10: Improvements to voucher and other rental assistance policies and implementation.

0-80% AMI

ACTION #16: Affordable housing funding feasability

ACTION #9: Affordable housing operational stabilization strategy

ACTION #11: Regional affordable housing inventory and listing service

ACTION #5: Equitable access to regulated affordable housing

ACTION #6: Community co-design

ACTION #7: Innovative approaches

0-120% AMI

ACTION #1: Housing pre-development and technical assistance

ACTION #3: Local HPS implementation funding and support

ACTION #12: Regional land bank plan

60-120% AMI

ACTION #8: Middle housing assessment

ALL INCOMES

ACTION #2: Expand funding for the brownfield grant program

ACTION #4: Regionally available pool of housing professionals for technical assistance and staffing support

ACTION #13: Permitting dashboard

ACTION #14: Urban growth management functional plan housing audit

ACTION #15: Coordinated advocacy agenda

Income data source: HUD 2024 Median Income Percentages for the Portland Vancouver-Hillsboro MSA, SSDI 2024, SSI 2024, BLS May 2024. Affordable monthly housing costs are calculated at 30 percent of monthly income.

Regional Housing Coordination Strategy

December 2025



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LIST OF ACRONYMS

The following is a list of acronyms used throughout this document.

AFFH:	Affirmatively Furthering Fair Housing
AMI:	Area median income
CORE:	(Metro) Committee on Racial Equity
HPS:	Housing Production Strategy
HRAC:	Homelessness Research and Action Collaborative (at Portland State University)
LIHTC:	Low-Income Housing Tax Credits
MPAC:	Metro Policy Advisory Committee
MTAC:	Metro Technical Advisory Committee
OHCS:	Oregon Housing and Community Services
OHNA:	Oregon Housing Needs Analysis program
PITC:	Point in Time Count
PSH:	Permanent Supportive Housing
RHCS:	Regional Housing Coordination Strategy
RLIS:	Regional Land Information System
SDC:	System development charge
SHS:	Supportive Housing Services (Metro's voter-approved fund)
UGB:	Urban growth boundary
UGR:	Urban growth report

EXECUTIVE SUMMARY

The causes of the housing crisis that greater Portland faces are entrenched and complex, requiring a response that is both urgent and robust. Market conditions, zoning limitations and other obstacles have resulted in years of underproduction across both regulated affordable housing and market-rate housing. The result is a severe housing shortage that has driven up consumer costs and pushed more people into unstable living situations. Direct consequences of this housing shortage have become ubiquitous: more than a thousand evictions are filed each month, homelessness is rising and highly visible across many communities, and disparities among who can and cannot afford housing continue to grow. But with a collaborative regional approach, Metro has identified pathways to creating more housing of all types and at all price points.

Demographic shifts such as an aging population, an increase in smaller, one-and-two-person households, and an increase in rent-burdened households mean that a broader variety of homes is needed. More deeply affordable, accessible and family-sized rental units are needed, as is a broader range of homeownership opportunities. Additionally, coordination and alignment across housing and homeless services systems must improve to ensure that individuals and families exiting homelessness are able to access housing that is designed and operated to meet their needs.

While housing production in greater Portland picked up after the Great Recession, it never fully caught up with population growth and today it is slowing again. Market conditions, including high costs for labor, materials, land and borrowing, as well as negative perceptions of the region among outside investors, continue to depress housing production. These dynamics have particularly hampered the production of large, complex projects like apartment developments. Additionally, the new pipes, roads, parks and schools that are needed to support housing growth push housing prices up even more.

Local governments have responded. Some have reformed zoning to allow for a greater variety of housing types and these changes have begun to show results. But more work is needed to overcome the unprecedented challenges facing the housing market and to ensure that good intentions translate into real housing outcomes.

The regional affordable housing bond voters passed in 2018 serves as an example of where coordination has been effective. On track to provide 5,600 new affordable homes—1,700 more than initially projected—the bond has supported housing investments that are distributed evenly across the region rather than concentrated in the urban core. These homes are also designed and operated in partnership with community organizations. In many cases, wraparound services funded through another regional measure, the supportive housing services tax, help to meet a range of needs. More than half of the bond-funded homes are sized for families, and about 40 percent are deeply affordable for households earning a third or less of the area's median income.

However, with these bond dollars—and the Portland affordable housing bond dollars—almost completely spent, greater Portland is approaching an affordable housing production cliff.

Metro's current estimates show that greater Portland still needs 27,000 more homes to support its existing population and an additional 151,000 homes to keep up with forecasted population growth over the next 20 years. Meeting that overall need for 178,000 more homes will require the construction of an average of about 9,000 more homes every year. About two-thirds of those homes need to be affordable for households with low or very low incomes. Overcoming these challenges will require sustained leadership, collaboration among every level of government, and a collective commitment to building more homes of all types and at all income levels.

This document provides an overview of the region's housing shortage and the barriers that are impacting housing production. It also provides a summary of results from engagement and the evaluation that Metro conducted to identify and prioritize recommended actions that Metro will undertake to address the shortage.

New actions to be taken by Metro

	ID	Action	Impact on development of needed housing	Impact on housing affordability or choice
Accelerate housing production	1	Create a new **housing pre-development and technical assistance grant program** for site specific housing development. May include site surveys, feasibility studies, design, permitting, etc.	Low	Low
	2	Expand **resources available for brownfield assessment** and explore grant opportunities for small scale remediation that leads to middle housing and multi-family housing development**.**	Medium	Medium
	3	Funding and support for **local housing production strategy implementation**	Medium	Low
	4	Consider developing a **regional pool of housing professionals for technical assistance and staffing support** to smaller jurisdictions to support planning and implementation related to housing production, affordability and choice.	Medium	Low
Research and assessment	5	Evaluate lessons learned and effective practices from implementation of the 2018 Affordable Housing Bond; research models and best practices and develop and share recommendations with state and local funders to **strengthen fair housing and equitable access to affordable housing.** Incorporate recommendations into the implementation of any future Metro affordable housing funding implementation.	Low to none	Low to Medium
	6	Building upon lessons learned and best practices from the 2018 Metro Affordable Housing Bond and Metro's Transit Oriented Development (TOD) grant program, evaluate and advance opportunities to **strengthen requirements and incentives for community participation and co-design in the development and operations of Metro funded affordable housing**, to support the creation of housing that is designed and operated to be culturally responsive to the needs of historically marginalized populations. Identify opportunities for Metro to support capacity building for community based and culturally specific organizations to participate in affordable housing development and operations through future housing funding allocation and/or program requirements or criteria that incentivize partnerships that benefit community based and culturally specific organizations.	Low to none	Low to Medium
	7	Research, evaluate and identify opportunities to advance **innovative and non-LIHTC approaches to housing** development/construction, financing, and ownership that present **opportunities to reduce costs, diversify housing types, and strengthen outcomes** for groups most impacted by housing instability. This research is intended to build upon previous Metro research and engagement in 2024 to evaluate	Medium	Medium

New actions to be taken by Metro

	ID	Action	Impact on development of needed housing	Impact on housing affordability or choice
		affordable housing investment opportunities. The 2024 study scope included consideration of rental housing development gap funding, acquisition/conversion, preservation, and complementary investments such as land acquisition/banking, predevelopment funding, and operating support and risk mitigation, as summarized in Metro's report, Evaluation of Affordable Housing Investment Opportunities. Based on feedback collected through the 2024 engagement process as well as 2025 engagement related to the RHCS, Metro has identified additional areas of research/engagement related to future affordable housing funding opportunities. This action seeks to fill gaps in previously conducted research by exploring and evaluating areas of innovation not previously explored, including: • Modular and manufactured housing and cross-laminated timber and smaller or expandable designs • **Social housing and alternative ownership** models, including CLT and resident-owned multi-family housing models • Innovative financing approaches to support development and operations of **smaller scale (<20 unit) building types**, including PSH Assess barriers and identify opportunities to pilot or scale up innovative approaches; approach would include engagement with public, private, and philanthropic partners to support coordinated research, development and investment strategies.		
	8	Conduct an **assessment of middle housing** in the region to identify best practices and common barriers.	Low	Low
Convene and coordinate	9	Develop or support the development of a coordinated **affordable housing operational stabilization strategy** to respond to industry-wide challenges due to rising operational costs, increased resident needs, and lack of coordination/alignment with homeless and supportive services. This strategy will result in a coordinated set of concrete actions for Metro and state/local partners to take to address operational stabilization needs, potentially including but not limited to: adjustments or flexibility to established regulatory agreements, changes to policies such as rental assistance payment standards, coordinated actions to address vacancies and streamlined referrals, and coordination to secure new funding for operational stabilization.	Medium	Medium to High

8

New actions to be taken by Metro

	ID	Action	Impact on development of needed housing	Impact on housing affordability or choice
	10	**Evaluate and improve voucher and other rental assistance policies and implementation** to address portability challenges, shifting market conditions impacting affordable housing, and to connect available vouchers with vacant regulated affordable housing units.	Low	Medium
New tools	11	Develop a centralized **regional affordable housing inventory and listing service** to support housing navigators and seekers in connecting with information about available affordable housing units that meet their needs across the region.	Low	Medium
	12	Develop a plan for a **regional land bank** that outlines the necessary legal framework, governance structures, and operational guidelines to support cross-sector collaboration and investment. Define clear policy priorities, including considerations related to Affirmatively Furthering Fair Housing, market conditions and funding opportunities.	Low	Low
	13	Explore how to create a **permitting dashboard** to track trends across the region.	Low	Low
Policy	14	Begin a Metro **Urban Growth Management Functional Plan audit and cleanup** of housing-related titles to align with new State requirements and regional priorities as identified in the 2027 Future Vision.	Low	Low
Funding and cross-sector collaboration	15	Convene jurisdictional partners to develop a **coordinated legislative agenda for state and federal housing/homelessness resources**, including a regional priority to identify funding for infrastructure. The agenda would be updated as needed to meet changing regional needs (or every six years) and guided by engagement with appropriate Metro advisory committees for land use, housing and homelessness, engagement with jurisdictions, and consultation with interested Tribes.	Medium to High	Medium
	16	Consider the viability and feasibility of **new funding for affordable housing development and preservation**. Ensure that any new funding framework is informed by public opinion research and engagement with public, private and nonprofit leaders as well as analysis of housing needs and market conditions, and lessons learned from the 2018 regional housing bond and best practices from other regions, including evaluating opportunities to strengthen racial equity, fair housing and community resilience outcomes and alignment/integration with homeless and supportive housing services.	High	High

Regional Housing Coordination Strategy background

Directed by new requirements under the Oregon Housing Needs Analysis (OHNA) program, jurisdictions around Oregon are developing Housing Production Strategies that are intended to address housing production targets set by the state. [1] Metro, with its unique role as an elected regional government, has a new responsibility under the OHNA program to adopt a Regional Housing Coordination Strategy (RHCS) every six years. This RHCS identifies the actions that Metro will take over the next six years to advance housing production, access to opportunity, affordability, and choice in greater Portland. These new actions build on Metro's long history of working to create thriving communities, and more recently, its success in large-scale affordable housing development and supportive housing services investments.

Consistent with the theme of coordination, two Metro departments—the Housing Department and the Planning, Development, and Research Department—collaborated to develop the RHCS. The actions identified in this RHCS reflect the diverse expertise and areas of focus of those two departments, the Metro Council's leadership, and extensive input from local jurisdictions, housing developers, owner/operators, and industry leaders, as well as coalitions and organizations engaged in housing advocacy.

Purpose of the RHCS

This strategy emphasizes Metro's critical role in advancing regional solutions and supporting the efforts of cities and counties in accelerating housing production. Though Metro does not zone land or build homes, Metro plays an important part in helping to create the conditions for success, addressing gaps in capacity and resources, and supporting coordination and alignment at the state and local level and across public, private and nonprofit sectors. This RHCS aims to encourage the production and preservation of housing that addresses the following goals, as defined in statutory language related to the OHNA:

- Diversity of housing types and affordability levels
- Housing that is high quality and physically accessible
- Housing with access to economic opportunities, services, and amenities
- Promotion of fair housing

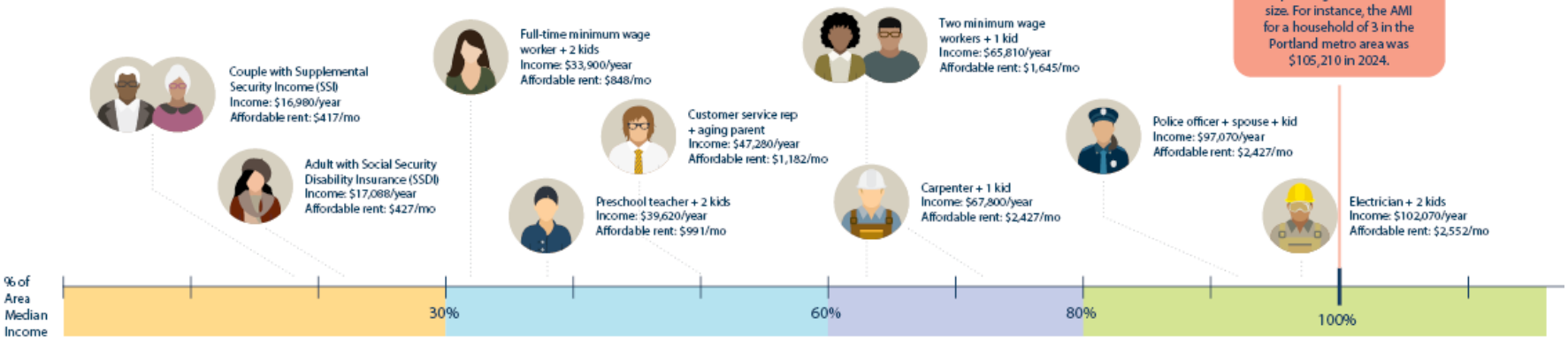
[1] The state referenced Metro's 2024 Urban Growth Report assessment of housing needs when setting these targets for Metro area jurisdictions.

REGIONAL HOUSING COORDINATION STRATEGY

Connecting equitable housing strategies to resident needs

Metro is collaborating with regional partners to take new actions to advance housing production, affordability, and choice for families at different income levels.

Area median income (AMI) is the income level at which half of households earn more and half earn less. AMI varies depending on household size. For instance, the AMI for a household of 3 in the Portland metro area was $105,210 in 2024.



0-30% AMI

The private market does not provide housing affordable at this level. Units require deep construction subsidies and ongoing operating support, such as rental assistance vouchers, to remain affordable. Many households also benefit from on-site support services, which require additional funding or resources.

30-60% AMI

The private market does not provide housing at this income level. Regulated affordable units require construction subsidies but can typically operate without ongoing rental vouchers.

60-80% AMI

The private market provides limited new rental housing in this range, generally smaller units such as studios and one- bedrooms. This group also relies heavily on older rental housing sotck that has "filtered" down to become more affordable.

80-120% AMI

The private market provides rental units in a wider variety of sizes at this income level. It also begins to offer limited ownership opportunities, primarily condominiums, though the vast majority of options remain rentals.

The RHCS actions listed here will be advanced over the next six years (2026-2031)

0-30% AMI

ACTION #10: Improvements to voucher and other rental assistance policies and implementation.

0-80% AMI

ACTION #16: Affordable housing funding feasability

ACTION #9: Affordable housing operational stabilization strategy

ACTION #11: Regional affordable housing inventory and listing service

ACTION #5: Equitable access to regulated affordable housing

ACTION #6: Community co-design

ACTION #7: Innovative approaches

0-120% AMI

ACTION #1: Housing pre-development and technical assistance

ACTION #3: Local HPS implementation funding and support

ACTION #12: Regional land bank plan

60-120% AMI

ACTION #8: Middle housing assessment

ALL INCOMES

ACTION #2: Expand funding for the brownfield grant program

ACTION #4: Regionally available pool of housing professionals for technical assistance and staffing support

ACTION #13: Permitting dashboard

ACTION #14: Urban growth management functional plan housing audit

ACTION #15: Coordinated advocacy agenda

Income data source: HUD 2024 Median Income Percentages for the Portland Vancouver-Hillsboro MSA, SSDI 2024, SSI 2024, BLS May 2024. Affordable monthly housing costs are calculated at 30 percent of monthly income.

Equity considerations

Equitable access to affordable, accessible, well-located housing is central to people's prosperity, stability and quality of life. This project worked to keep racial equity front and center throughout by applying Metro's Racial Equity Framework, in alignment with Metro's Strategic Plan to Advance Racial Equity, Diversity, and Inclusion. The Framework guided project scoping, data collection, engagement, identification of actions in this RHCS, and evaluation of those actions.

Engagement

Because this RHCS is intended to coordinate and support the work of other jurisdictions and partners, the actions included in this document were identified in close collaboration with an Implementers Work Group consisting of local planning and housing staff, focus groups with industry and community leaders, and Metro's standing committees, including the Metro Technical Advisory Committee (MTAC), the Metro Policy Advisory Committee (MPAC), and the Metro Committee on Racial Equity (CORE).

Types of actions in this RHCS

Actions included in this RHCS fall into several general categories, including:

- Communications and engagement
- Convening
- Data and analysis
- Emerging best practices and innovation
- Funding and investments
- Legislative advocacy
- Partnerships and collaboration
- Regulation and regional policies
- Technical assistance and capacity building

Next steps

The challenge of creating and sustaining housing options that meet the diverse needs, household configurations, and income levels of people in our region is too big for any single jurisdiction. Collective efforts are needed now more than ever. This RHCS provides a framework for regional coordination and collaboration to guide progress toward a future where all people have access to safe, affordable and stable housing. Once adopted by Metro Council, the RHCS will guide Metro's actions over the next six years (2026-2031). It will be followed by the development of more detailed work plans and continued engagement to further shape the work and ensure responsiveness to needs, opportunities and shared values.

PURPOSE OF THE REGIONAL HOUSING COORDINATION STRATEGY

Today's mounting housing challenges require solutions and coordination at all levels: national, state, regional, local, and across public, private and nonprofit sectors. Metro's regional perspective provides a unique opportunity not available to most other metropolitan areas around the country. Because the housing market does not abide by city or county boundaries, Metro's efforts can support and accelerate work done at the local level by increasing coordination and identifying and filling gaps best addressed at the regional scale.

Metro's work related to housing is typically several steps removed from development, but that coordinating role is more important than ever. Through urban growth management duties, land acquisition programs and grants to support planning for new homes and jobs, Metro helps to foster the conditions to support construction of houses and apartments that are affordable across the income spectrum. Metro is also positioned to support strategic investments in housing along current and future transit corridors, ensuring long-term affordability follows opportunity.

Additionally, Metro works to support city and county partners in assessing housing needs and implementing zoning and code changes to speed up construction of housing in existing, developed areas, including areas with good access to transit, services and jobs.

However, affordable housing for those with the lowest income requires public subsidy because of both higher operating costs and income-restricted rents. This is an issue the market cannot solve alone.

More recently, Metro has taken on a role in overseeing the implementation of two voter-approved funding measures that have deepened the agency's involvement in addressing the region's housing crisis. In 2018, voters passed a regional affordable housing bond that is on track to produce more than 5,600 new units of affordable housing across the region. Then, in 2020, voters tasked Metro with overseeing a regional homeless services tax, known as Supportive Housing Services or SHS, which Metro distributes to Multnomah, Washington and Clackamas counties to expand homeless and housing services. In addition to ensuring oversight and accountability for these voter-approved measures, Metro's Housing Department convenes partners to advance systems coordination, alignment and capacity building necessary to maximize the impact of these voter approved funds. The state's relatively new OHNA program now requires that Metro adopt a RHCS at least every six years. This RHCS organizes and prioritizes Metro's ongoing and future work related to housing, identifying the actions Metro will take over the next six years to advance:

- The development of needed housing
- The development and maintenance of housing that is of diverse housing types, high quality, physically accessible and affordable
- Housing with access to economic opportunities, services and amenities

- Actions that affirmatively further fair housing[2]

RACIAL EQUITY

Racial equity and fair housing are core aspects of the OHNA program. Equitable access to affordable, accessible, well-located housing is central to people's prosperity, stability, and quality of life.

Metro's Strategic Plan to Advance Racial Equity, Diversity and Inclusion guides all of Metro's work and established the foundation for applying a racial equity lens to the development of this RHCS. The plan includes a Racial Equity Framework tool that was used to prompt conversations to keep racial equity front and center at project milestones. Five meetings at various times during the project provided dedicated time for staff to reflect on how completed work aligned with the project's vision and guiding principles and prompted adjustments to the deliverables as needed to achieve better outcomes. The Framework guided project scoping, data collection, engagement, identification of actions in this RHCS, the evaluation approach, and plans for implementation and accountability.

Project vision statement

Create a roadmap for actions Metro will advance to promote housing production, coordination, and equitable access. This will be achieved by lifting up emerging best practices, coordinating and aligning local strategies, and addressing critical gaps that can be filled at the regional level.

Key outcomes from the racial equity check-ins included:

- Creation of the project's vision, guiding principles, and process goals
- Development of a better understanding of how to balance margins of error with detailed representation of smaller demographic groups
- Identification of themes and gaps from local Housing Production Strategy engagement to ground this strategy in established priorities and needs
- Preparation for sharing RHCS project updates with CORE and thinking through ways to best incorporate their perspectives and feedback into the project
- Development of a fair housing training for project staff to support education, awareness and dialogue about how Metro can incorporate fair housing principles throughout the RHCS and beyond
- Inclusion of eight specific fair housing metrics in the evaluation framework to ensure the final package of actions in the RHCS addresses a variety of outcomes related to racial equity and fair housing

[2] "Affirmatively furthering fair housing" means meaningful actions that, when taken together, address significant disparities in housing needs and access to opportunity and replace segregated living patterns with truly integrated and balanced living patterns to transform racially and ethnically concentrated areas of poverty into areas of opportunity and foster and maintain compliance with civil rights and fair housing laws. ORS 197A.100(9).

CURRENT HOUSING CONTEXT

This section describes current housing conditions and trends in greater Portland and the factors shaping them. It includes a description of:

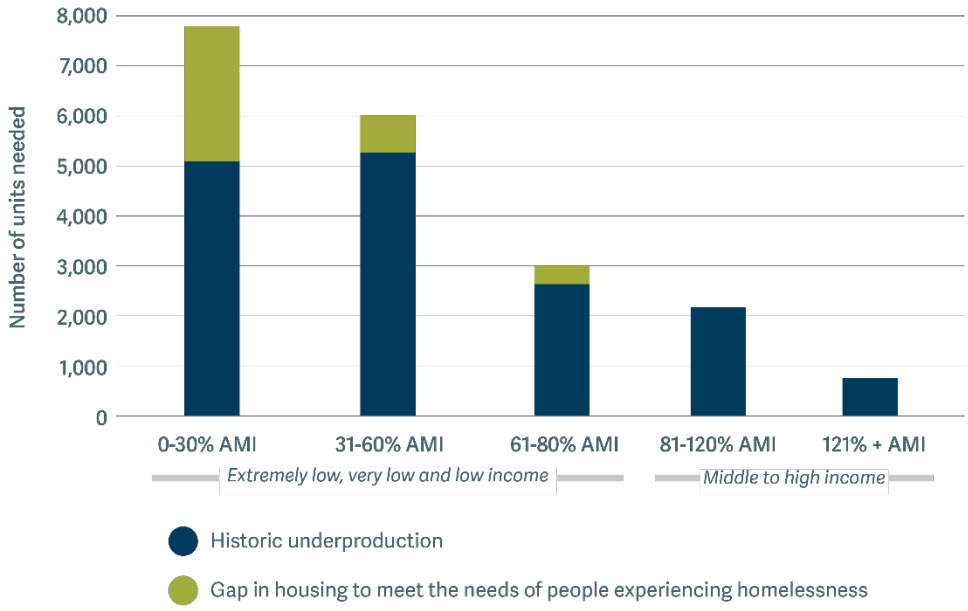
- Housing needs
- Recent production trends
- Housing affordability and stability, including cost burdens, homelessness, and rental assistance
- The role of housing location in access to opportunity and exposure to environmental benefits and harms
- Affordable housing production, financing, preservation, and stabilization trends, as well as an identification of barriers to development
- The importance of accessibility for an aging population

Together, these topics provide the context for understanding the region's housing challenges and informing the development of this RHCS.

Regional housing needs

Every six years, Metro analyzes regional housing needs to ensure that there is sufficient room for expected housing growth inside the region's urban growth boundary (UGB). Metro's 2024 Urban Growth Report (UGR) estimated that greater Portland currently is nearly 27,000 homes short of what's needed to support current population levels and will need to produce 151,000 additional units of housing over the next 20 years to keep up with future growth. Almost two-thirds of that future housing will need to be units affordable for people or households earning less than 80 percent AMI, as the need for affordable housing will continue to grow.

Figure 1: Current housing needed inside the Metro UGB by household income group (source: 2024 Metro UGR). Note: does not include forecasted housing needs.



As summarized below and detailed in Appendix 1, there are several demographic trends that are shaping the type, size, affordability, accessibility of housing needed.

Households are getting smaller and older.

One- and two-person households have become increasingly common, representing about two-thirds of households in the region. These trends are driven by people choosing to have fewer children as well as the aging of the Baby Boomer generation. Between 2000 to 2020, the percentage of households with children less than 18 years old decreased from 33 percent to 28 percent, and the percentage of households with someone more than 65 years old increased from 19 percent to 27 percent, with the share of older adults expected to continue rising in coming decades. These shifts corresponded with a decrease in average household size, which is expected to further decrease from 2.41 people in 2024 to 2.27 in 2044.

As our population ages, the share of households that rely on fixed incomes like pensions and Social Security will increase. These incomes do not increase at the same rate as expenses such as rent, utilities, healthcare and food. Unless a household has substantial savings or can supplement its income, this can create financial strain that makes it difficult or impossible to maintain housing.

About a quarter of households include someone with a disability.

About one quarter of greater Portland's households include someone with a disability. These households tend to have lower median incomes and are more likely to face housing cost burden and to live in housing that does not fully meet their needs.

Many homes—especially older or market-rate rental units—lack accessibility features needed for people with mobility challenges or other disabilities. As the region's population continues to age, the share of residents with disabilities is expected to grow, increasing demand for affordable, accessible housing.

Housing tenure and cost burden

Access to stable, affordable housing depends not only on the overall supply of units, but also on the types of housing units available and their cost. In greater Portland, both homeownership and rental affordability trends show increasing challenges for households with low and middle incomes.

Homeownership rates are decreasing.

For several decades, homeownership rates have declined in the region, reflecting both national trends and local market pressures. Rising housing costs, limited supply of entry-level homes, and slower wage growth relative to home prices have all contributed. Additional factors—such as delayed household formation, higher student debt, and changing family structures—have also impacted homeownership patterns, particularly among younger adults.

In 2024, the median income for a family of three in greater Portland was $105,200. If that family were limited to spending 30 percent of its income on housing, their monthly housing budget would be $2,630, which is typically inadequate for purchasing a home in today's market. To purchase a home with the median listing price of $615,000 (Federal Reserve

A note about census data

Different communities have different levels of comfort with engaging with government censuses and surveys, which can result in undercounts. Additionally, estimates of smaller and harder-to-count populations tend to have less reliability than estimates for larger segments of the population. To increase reliability, the American Community Survey often publishes aggregated categories, which can mask important trends in the data, especially regarding race, ethnicity, and language.

The default confidence interval for both ACS and PUMS data is 90 percent, as this is the statistical standard set by the U.S. Census Bureau for publishing these estimates. This means that the published margin of error corresponds to a 90 percent confidence level, providing approximately 90 percent certainty that the true population value falls within the calculated confidence bounds.

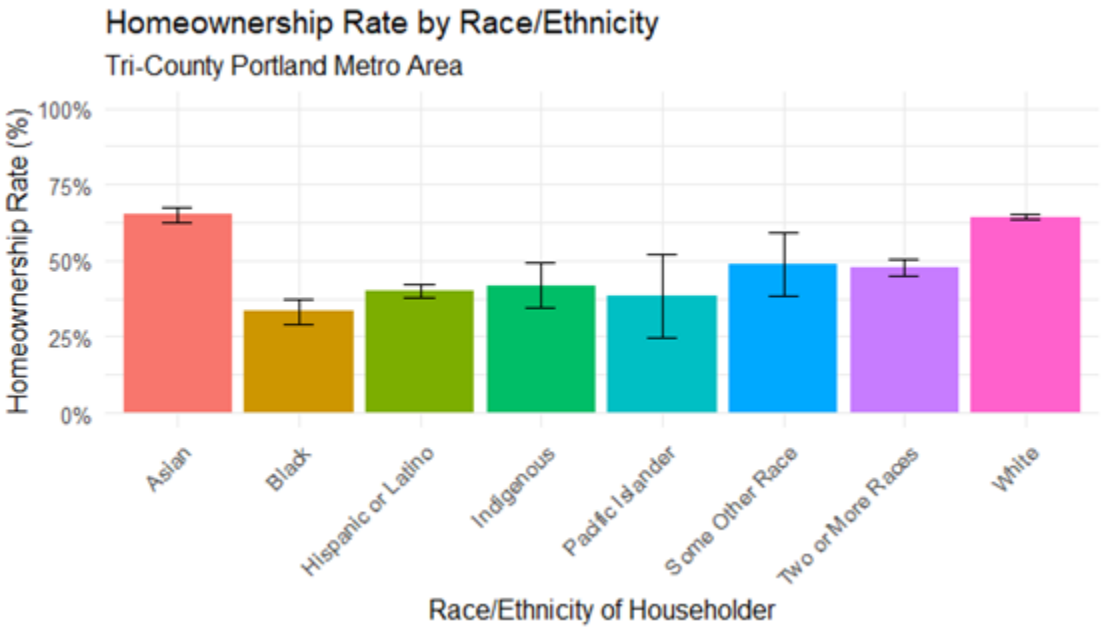
Bank of St. Louis, 2025), a household would need to spend closer to $3,500 per month, highlighting the difficulty of home ownership for median earners. Households that earn less than the median income face an even bigger affordability challenge.

There are disparities in homeownership rates by race and ethnicity.

While homeownership has long been promoted as a pathway to personal and community stability in the U.S., access to it has not been equitable. As shown in Figure 2, homeownership rates are highest for Asian and White households and lowest for Black, Indigenous, Pacific Islander and Hispanic or Latino households. These gaps have widened over the past decade. Differences in income explain some of this variation, but the legacy of historic and ongoing racist policies and practices—including discriminatory lending practices, redlining, and inequitable access to federal programs—continue to shape these disparities.

It is also important to acknowledge the likely variation within racial and ethnic subpopulations, some of which are challenging to show because of data limitations related to small sample sizes (Puget Sound Regional Council, 2024).

Figure 2: Home ownership rate by race/ethnicity



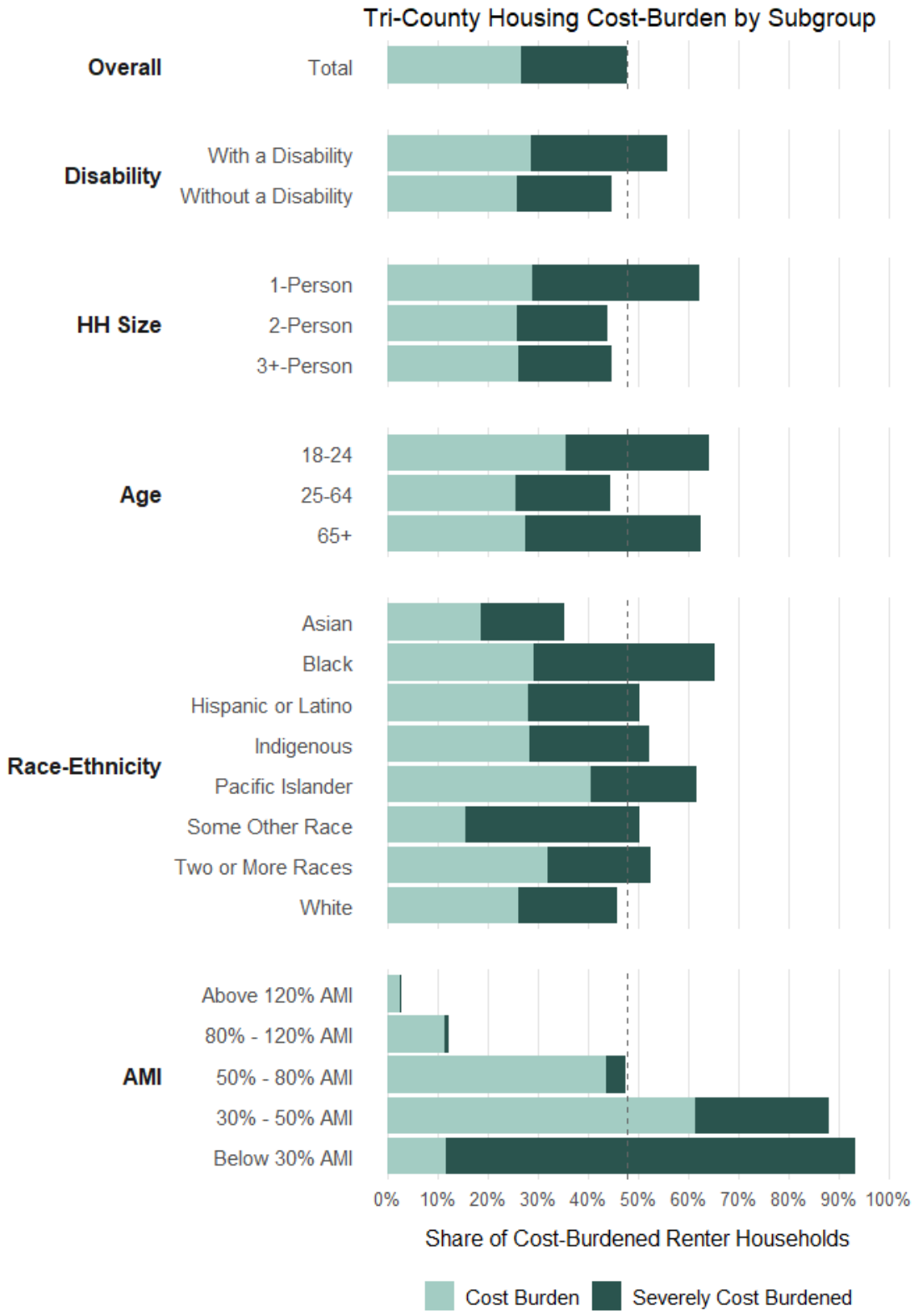
Owning a home can offer long-term financial benefits, such as equity accumulation and housing stability. However, the evidence that it is a reliable means of building wealth is more mixed and depends on market timing, the location of the housing, and the terms of lending. A study by the Federal Reserve Bank of St. Louis found that homeownership equity did not increase by as much as non-housing wealth during the longest period of available data from 1947 to 2016 (Federal Reserve Bank of St. Louis, 2017). The study also found that home equity was more volatile than other forms of wealth, particularly for Black and Hispanic households. This volatility can pose heightened risks

for economically vulnerable households, who may be forced to sell during an economic downturn, resulting in a loss in equity.

Shared-equity models like Community Land Trusts show promise in expanding access to affordable, sustainable homeownership. These programs are typically run by local governments or non-profit organizations. Homeowners forego a share of the home's appreciation so that it remains affordable for future owners. Studies find these models can reduce foreclosure risk, support wealth-building, and narrow racial homeownership gaps while preserving long-term affordability (Wang, Cahen, Acolin, & Walter, 2019) (Thaden, 2011).

For households unable to access homeownership, affordable rental options remain critical. Approximately half of renter households across greater Portland are cost burdened, spending more than 30 percent of their income on housing, and a significant share are severely cost burdened, spending more than 50 percent of their income on housing. Cost burden is most prevalent among one-person households, households that include someone with a disability, younger adults, older adults, and Black, Pacific Islander, Indigenous, and Hispanic or Latino households.

Figure 3: Cost burdened renter households by demographics (tri-county region)

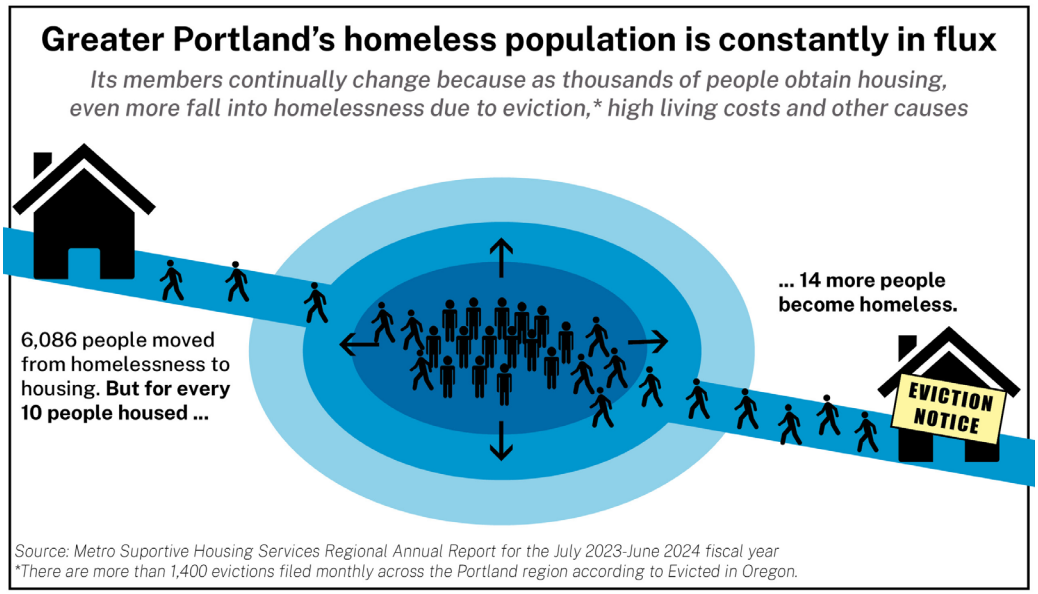


Housing Instability and Homelessness

Housing instability and homelessness in greater Portland are a direct result of the housing shortage. The growing crisis reflects both long-term and recent economic and market pressures, while historic and ongoing exclusionary and racist housing policies and practices continue to exacerbate the problem for communities of color. Federal disinvestment in housing and social services over several decades has left local governments and communities to fill the gap, often without adequate resources, and this trend is expected to continue because of recent federal actions. At the same time, rising housing costs, inflation and a persistent shortage of affordable homes have increased the number of households unable to maintain stable housing.

In recent years, voters and local governments in the Portland region have made historic investments in affordable housing and homeless services, helping thousands of people move into permanent housing each year. However, the number of people newly experiencing homelessness continues to outpace the number of those finding stable housing. This has led to steady growth in the overall homeless population despite significant local investments.

Figure 4: Diagram of inflow and outflow of the homeless population



National research consistently shows that rates of homelessness are most closely linked to the availability and affordability of housing (Horowitz, Hatchett, & Staveski, 2023). Cities with higher rates of behavioral health needs or poverty often experience lower rates of homelessness when housing is more abundant and affordable. In the Portland region, high housing costs and limited supply are primary causes of homelessness. Each month, more than 1,400 evictions are filed across the metro area, reflecting the pressure many households face (Evicted in Oregon, 2025).

The 2023 Point-in-Time Count conducted across Clackamas, Multnomah, and Washington counties identified 7,483 people experiencing homelessness on a single night. Of these, nearly 60 percent (4,355) were unsheltered, while 2,467 stayed in emergency shelters and 661 in transitional

housing. [3] (Zapata, Greene, Niehaus, Spurbeck, & Wei, 2024). The count is widely understood to understate the true scale of homelessness, as it does not capture people who are doubled up with friends or family and may miss others who cannot be located or surveyed.

Demographic characteristics of people experiencing homelessness:

- Race and ethnicity: Black, Indigenous, and other people of color (BIPOC) made up about 35 percent (2,121 individuals) of those experiencing homelessness who reported their race, a disproportionate share compared to the overall population. An additional 804 individuals identified as Hispanic or Latino.
- Age: Children and youth accounted for more than 17 percent of the total, including 918 children under 18. People that are 55 years or older represent about 20 percent of the population, underscoring the broad age range affected by housing instability.
- Chronic homelessness: About 41 percent of individuals met the federal definition of chronic homelessness, with nearly two-thirds of those unsheltered.
- Disabling conditions: A total of 1,448 individuals reported experiencing disabling conditions such as physical, intellectual, and developmental disabilities, behavioral health disorders, and chronic health conditions, during the past year.
- Veterans: Among the 565 veterans counted, nearly half were unsheltered and about one-third reported a disabling condition.

The persistence of homelessness in greater Portland underscores the central role of housing supply and affordability. While supportive services are critical to addressing individual needs, meaningful reductions in homelessness will require sustained efforts to expand affordable housing options, prevent evictions, and strengthen pathways to stable housing.

ACCESS TO OPPORTUNITY, SERVICES AND AMENITIES

Planning for housing requires attention, not just to housing types (e.g., multi-unit or townhouses) and characteristics (e.g., accessibility, number of bedrooms, and affordability), but also where housing is located. Housing location shapes access to jobs, education, transportation, health care, nature, and exposure to environmental benefits and harms. Together, these factors influence public health, economic opportunity, and overall quality of life.

To inform this RHCS and related efforts, Metro has created a series of opportunity maps that illustrate where different communities reside in relation to a variety of locational benefits and burdens. These maps provide important context related to access to economic opportunities, services, and amenities. A full set of opportunity maps is available in Appendix 2, but examples are provided below.

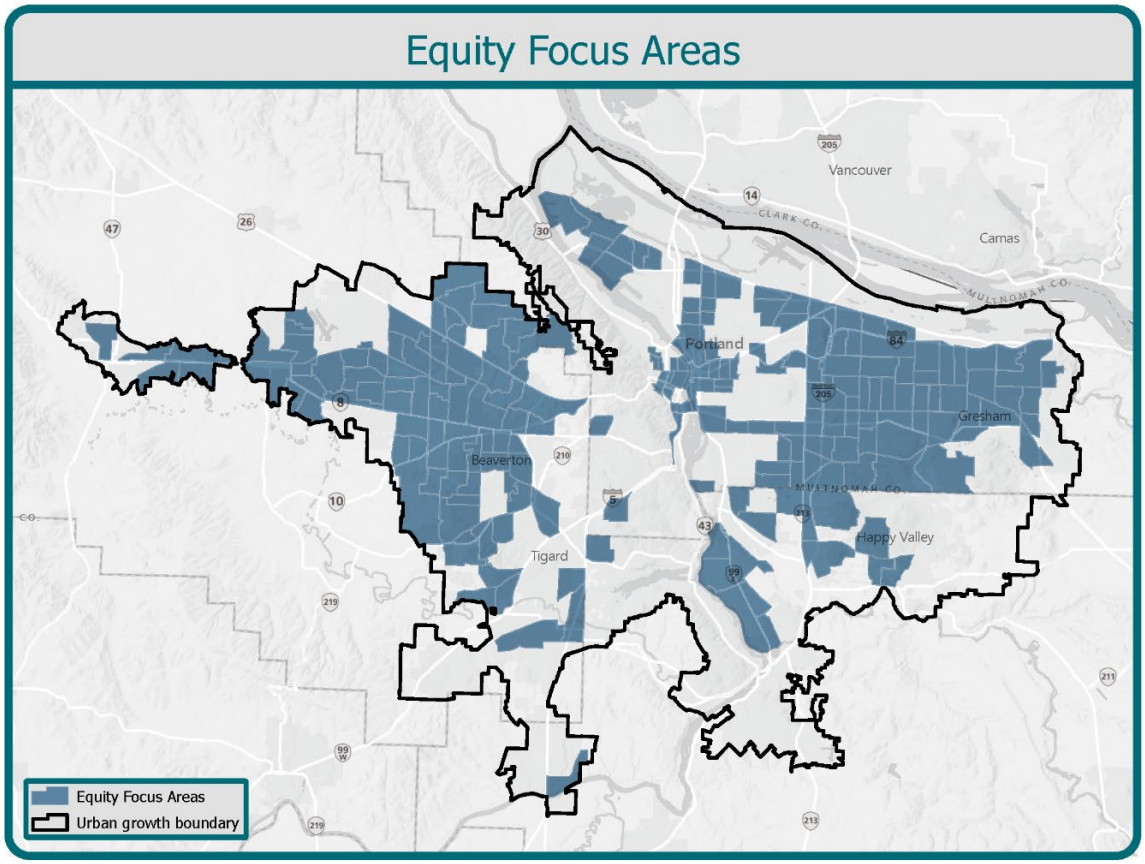
In recent years, Metro has refined a definition for Equity Focus Areas for use in a variety of research, evaluation and planning projects. Equity Focus Areas are Census tracts with a higher-than-average

[3] HRAC again collaborated with Clackamas, Multnomah, and Washington Counties on a tri-county 2025 Point in Time Count; however, a findings report for 2025's count was not available during the development of the RHCS.

share of at least one of the following populations, which are disproportionately impacted by housing instability:

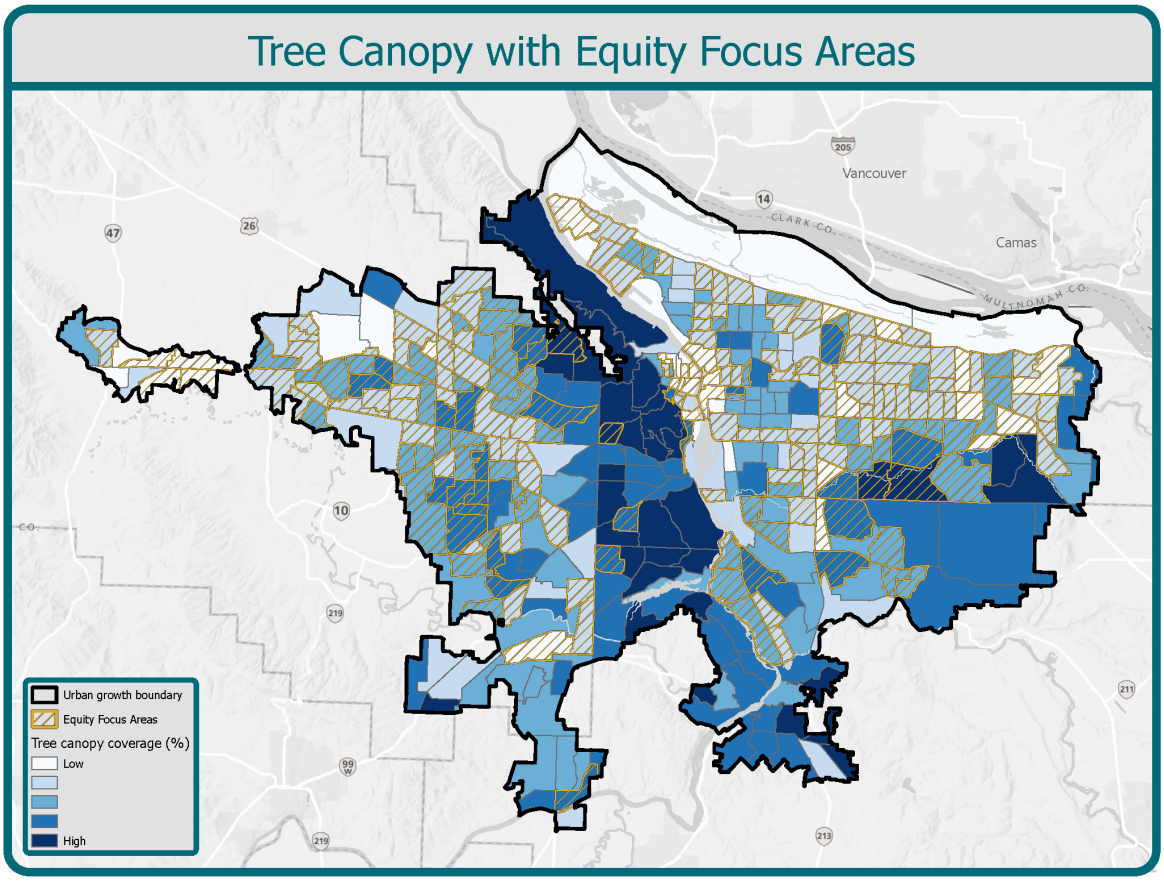
- Black, Indigenous, or people of color (BIPOC)
- Limited English proficiency
- Low income (less than 200 percent of the federal poverty level)

Figure 5: Equity Focus Areas (2022)



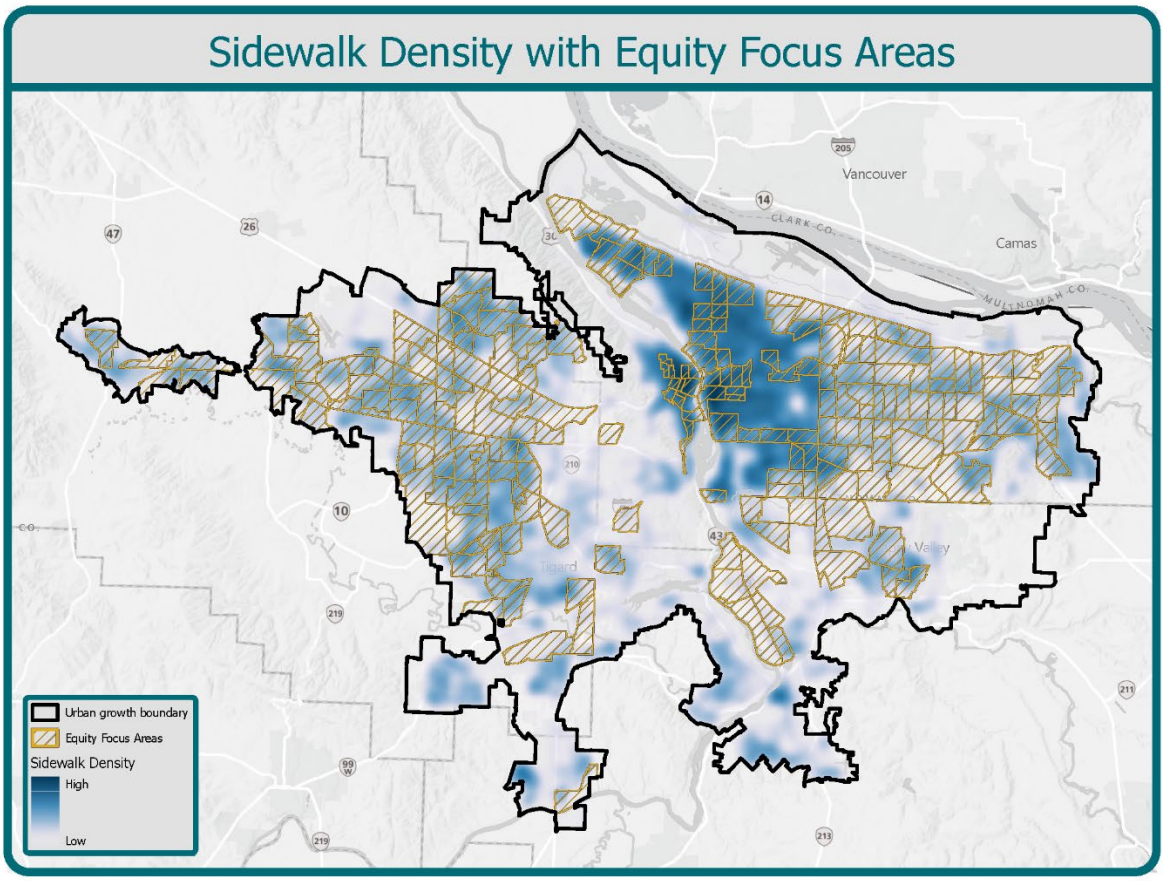
Other data layers can be overlaid with these Equity Focus Areas to get a sense for whether communities are experiencing disparate environmental and health impacts. For instance, Equity Focus Areas often have less tree canopy coverage. Reduced tree canopy can contribute to greater climate-related risks, such as exposure to extreme heat.

Figure 6: Map of Equity Focus Areas and tree canopy coverage



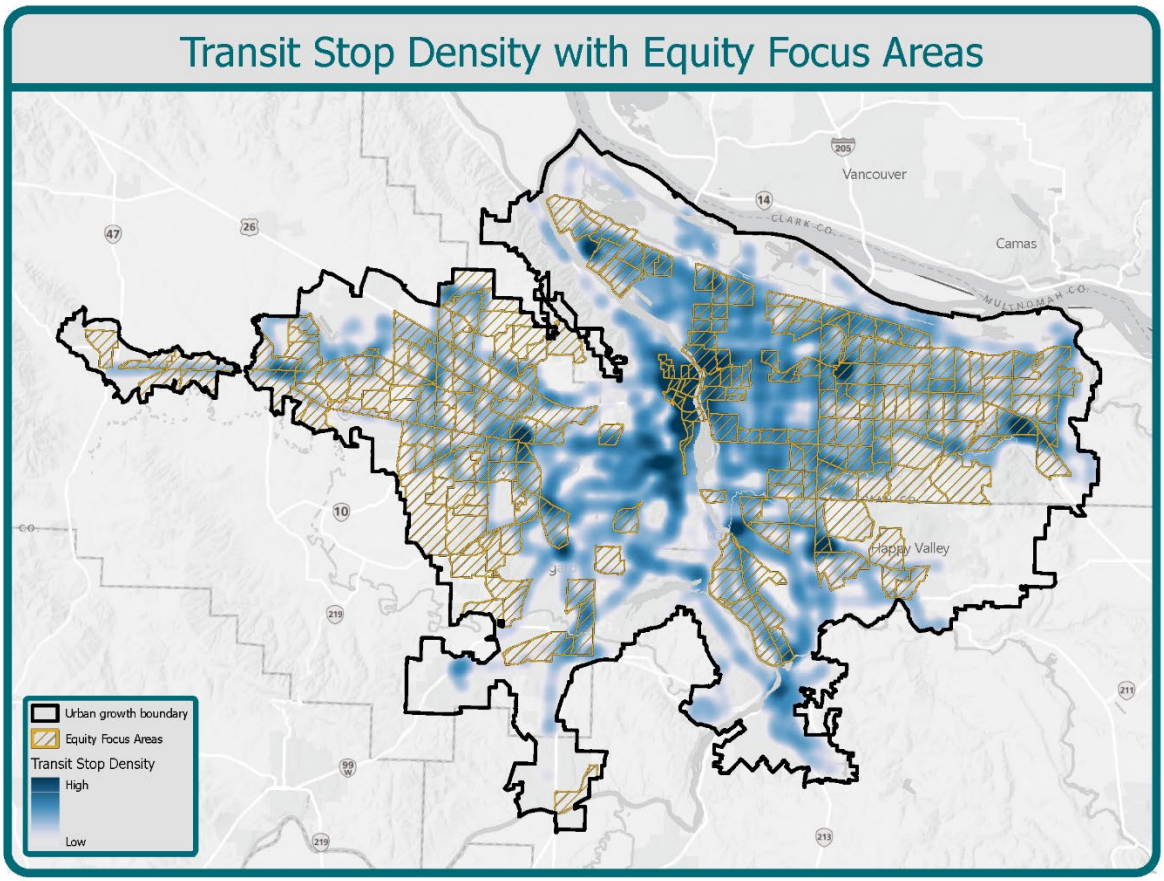
Likewise, Equity Focus Areas often have lower sidewalk densities than other parts of the region, which contributes to adverse health and safety impacts and lack of accessibility for residents with mobility challenges.

Figure 7: Map of Equity Focus Areas and sidewalk densities



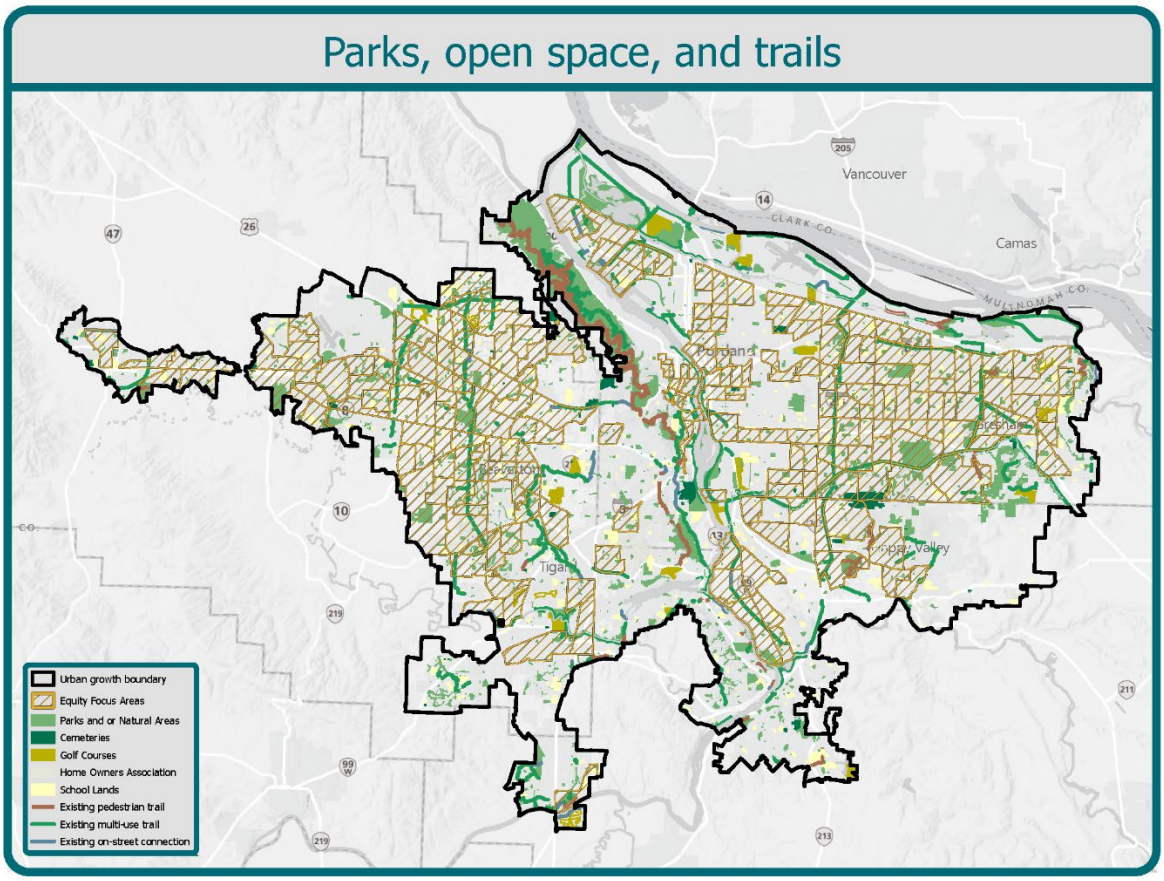
Overlaying Equity Focus Areas with a map of transit stop densities indicates that transit access is mixed. Some Equity Focus Areas have excellent access while others do not.

Figure 8: Map of transit stop density and Equity Focus Areas



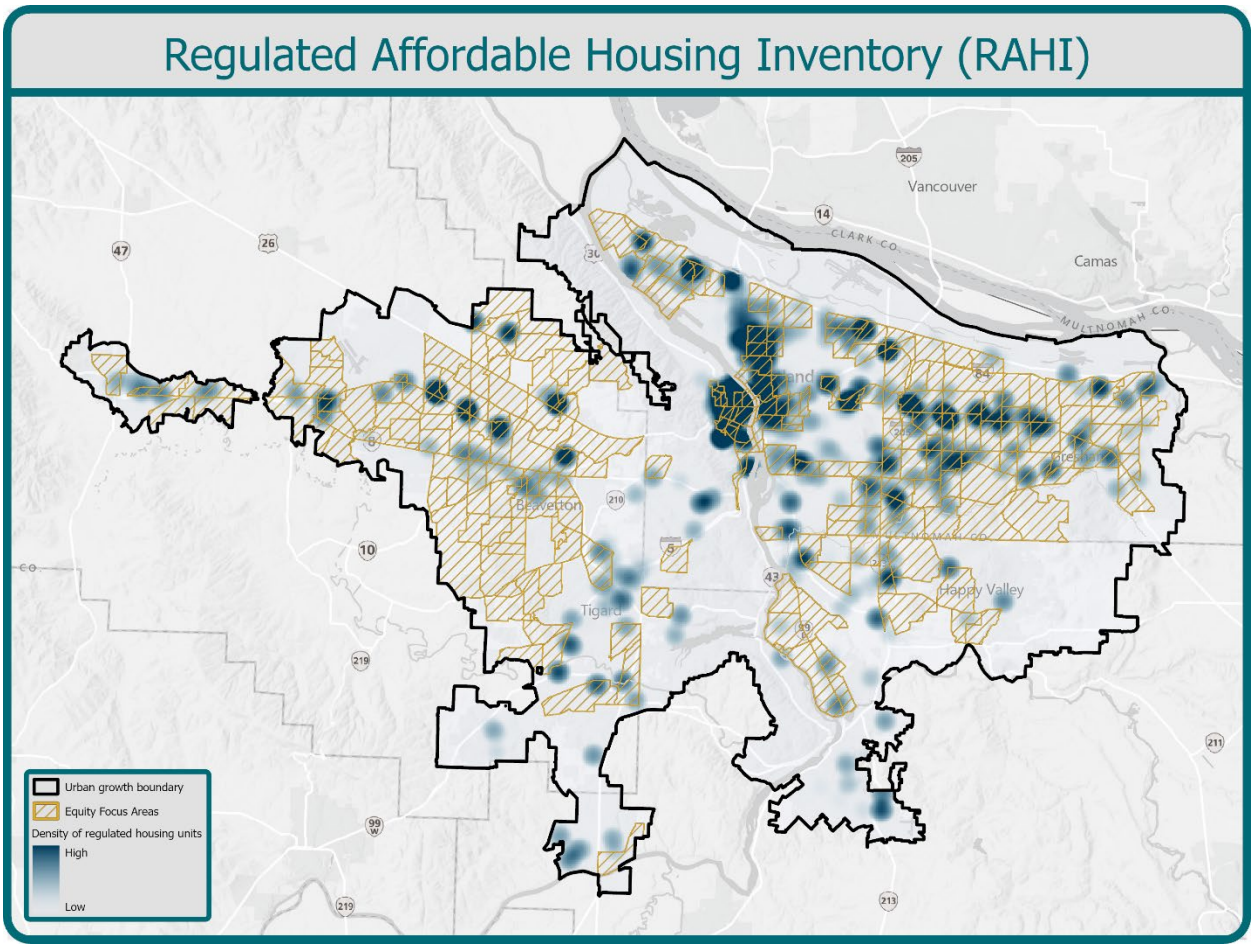
Overlaying Equity Focus Areas with a map of parks, open spaces, and trails indicates relatively good access to nature for BIPOC, low-income, and limited English proficiency populations within our region.

Figure 9: Map of parks, open spaces, trails, and Equity Focus Areas



Overlaying Equity Focus Areas with a map of regulated affordable housing shows significant overlap. This could indicate that there are higher concentrations of Equity Focus populations in these locations because of the affordable housing or that regulated affordable housing has been sited where Equity Focus populations already resided. Affordable housing projects that utilize Low Income Housing Tax Credits (LIHTC) are incentivized to locate in "Qualified Census Tracts" because of a "basis boost" that allows them to receive more tax credit funding. These areas, which must have at least 50 percent of households below 60 percent AMI, often overlap with EFAs. Approximately 60 percent of new affordable homes funded by the Metro Affordable Housing Bond are in EFAs. However, the Bond has also supported several investments in communities that historically lacked affordable housing options, such as the first regulated affordable housing building in Happy Valley.

Figure 10: Map of regulated affordable housing and Equity Focus Areas



HOUSING PRODUCTION TRENDS

To inform this RHCS, ECOnorthwest assessed recent housing production trends. Additional detail can be found in Appendix 3.

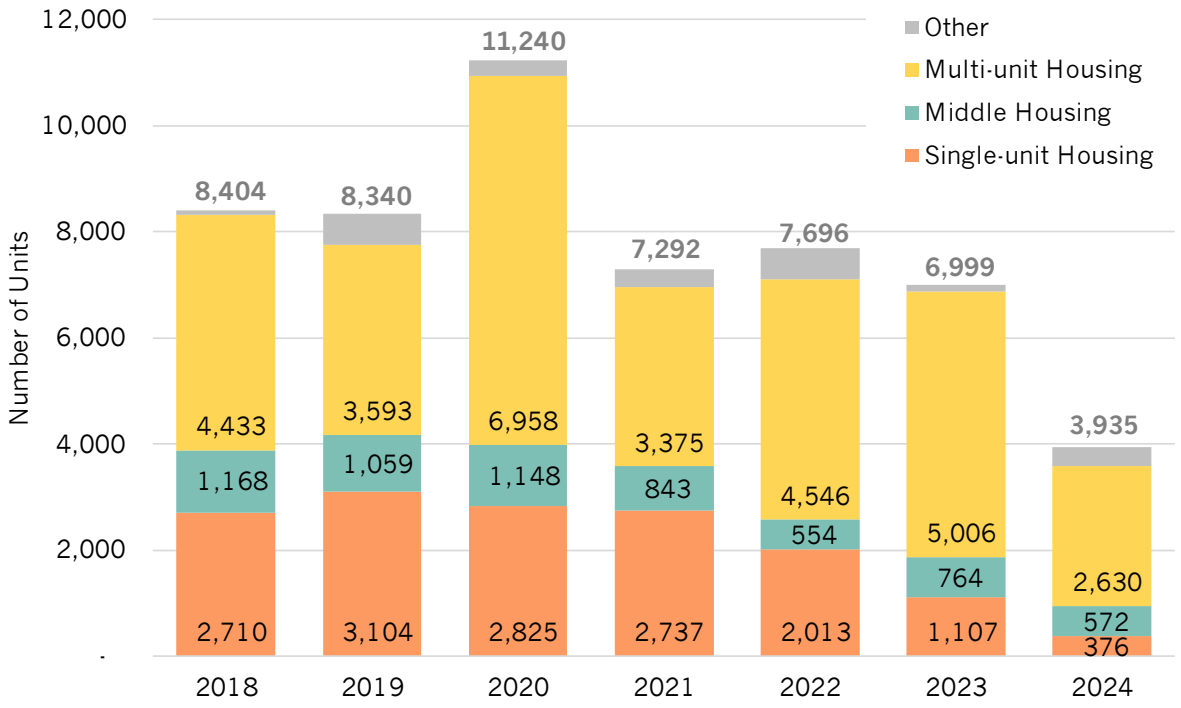
Overall production trends

Housing production rebounded after the 2008 Great Recession but has never returned to the levels of the early 2000s. Following a modest recovery from 2012 to 2019, production began to slow again after the COVID-19 pandemic. The decline in production in 2024 is particularly stark, dropping to about half of the average annual housing produced from 2018 to 2023.

What kinds of new housing are being built?

A majority (57 percent) of the new housing built inside the Metro UGB from 2018 to 2024 was multi-unit housing, followed by single-unit housing (28 percent), and middle housing (11 percent).

Figure 11: Housing units by type, Metro UGB, 2018-2024



Source: Metro RLIS, summarized by ECOnorthwest

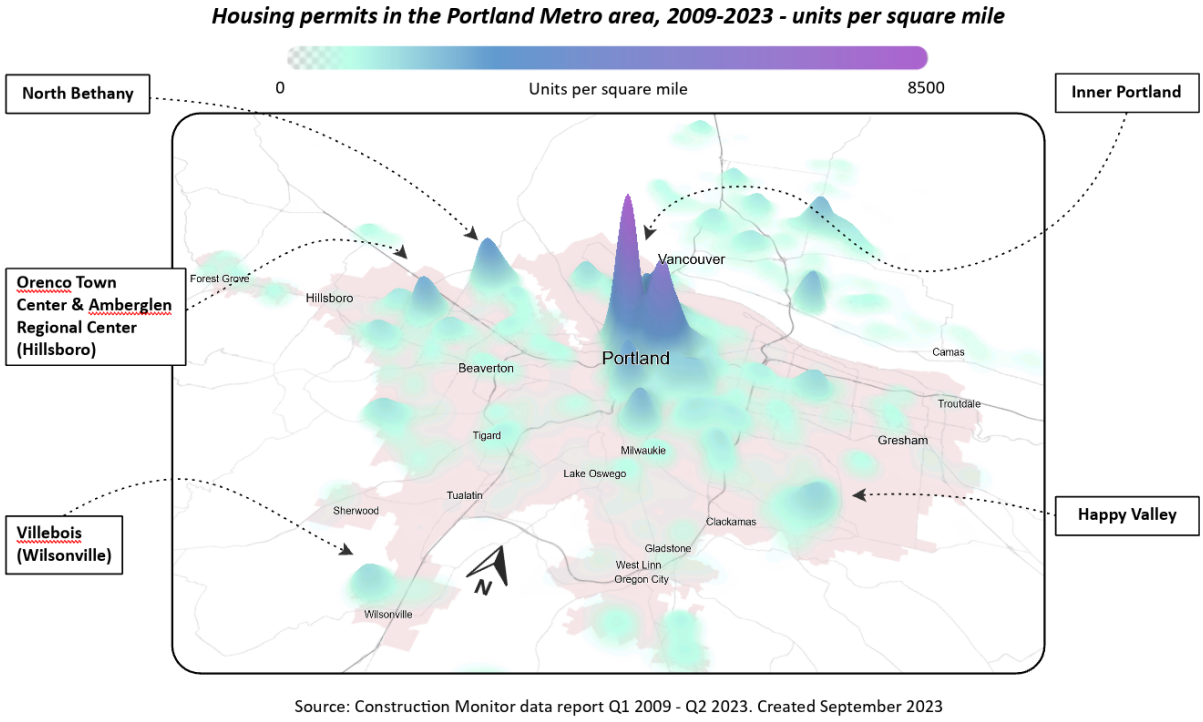
Note: There is a lag between when units are delivered and when they appear in Metro RLIS data.

Note: Middle housing includes ADUs, plexes, townhomes, and cottage cluster housing. "Other" includes manufactured homes, dormitories, and retirement facilities.

Where has new housing been built?

Over the past decade and a half, new housing construction has been focused in existing urban areas, particularly close-in Portland, Orenco Town Center, and Amberglen. While some urban growth boundary expansion areas have taken many years to urbanize or remain undeveloped today, North Bethany, Villebois, South Hillsboro, and Happy Valley stand out for producing housing. Likewise, considerable housing production has happened outside Metro's UGB in Clark County, Washington.

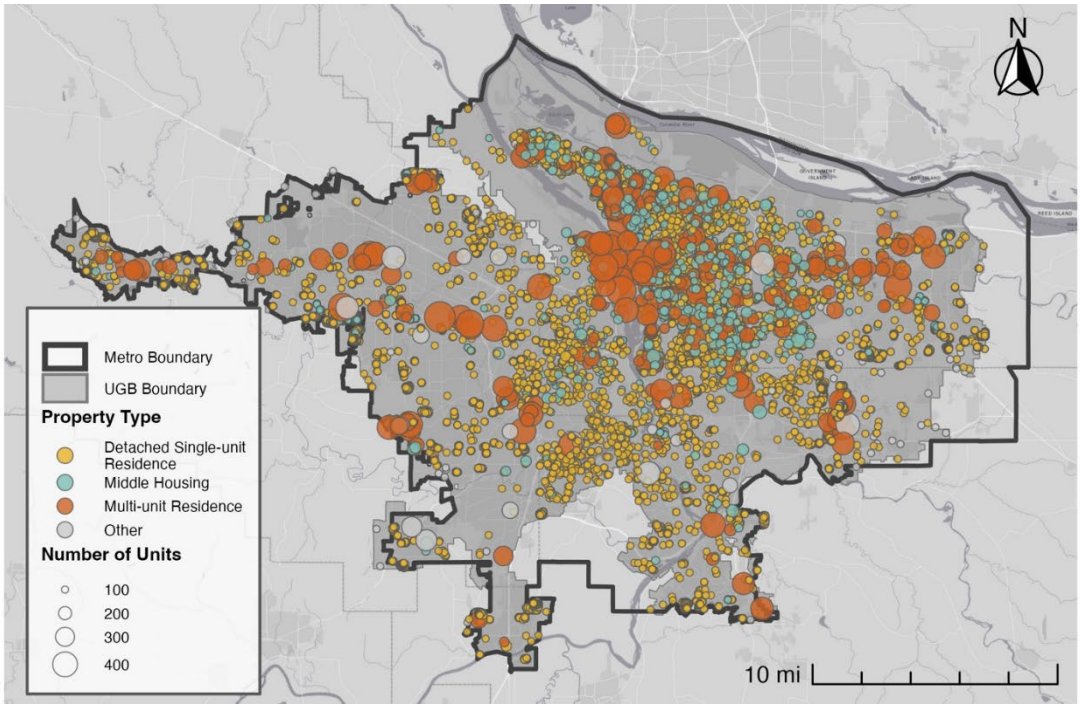
Figure 12: Housing permit activity in the Metro area (2009-2023)



Source: Construction Monitor data report Q1 2009 - Q2 2023. Created September 2023

As depicted in Figure 13, North and Northeast Portland have seen the highest number of new homes built across all housing types over the past six years. Multi-unit housing construction has been especially concentrated in the Pearl District and along the Williams, Interstate, and Mississippi corridors. Single-family development has been more broadly distributed throughout the urban growth boundary. Middle housing development is focused in North and Northeast Portland.

Figure 13: Geographical distribution of residential development, 2018 through 2024

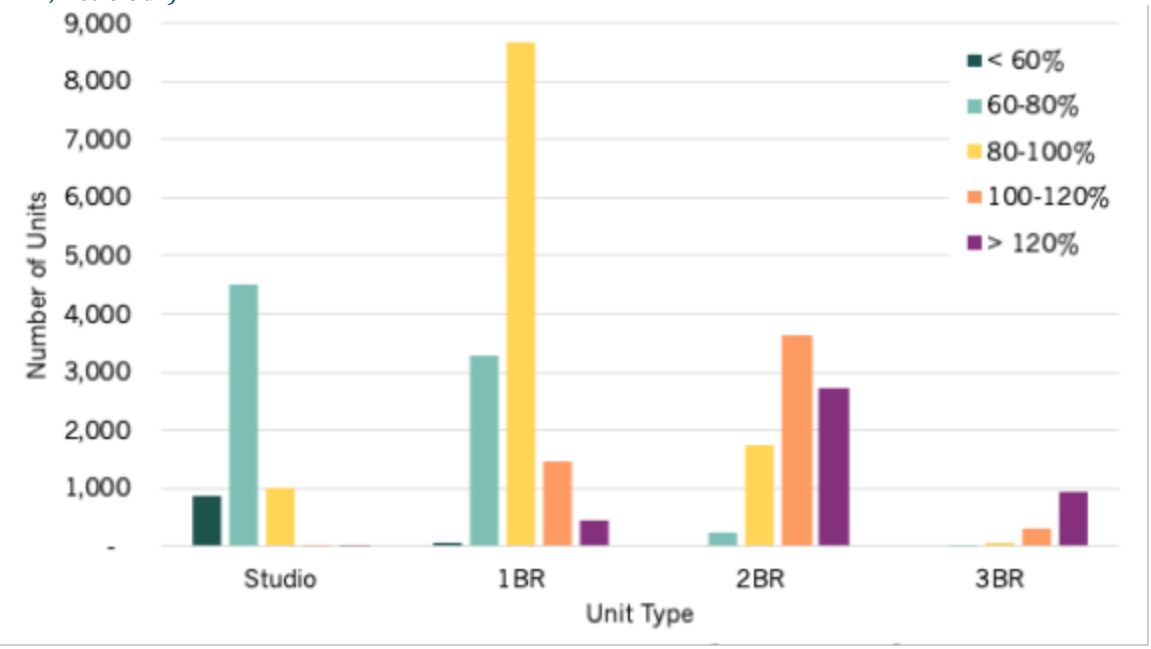


Source: Metro RLIS, displayed by ECOnorthwest

Who can afford new market-rate multi-unit rentals?

Newly constructed market-rate studio and one-bedroom apartments generally serve middle- and higher-income households. Studios and one-bedroom units sometimes offer relatively lower-cost options, but even these are often out of reach for households earning below 80 percent of Area Median Income (AMI). New two-to-three-bedroom rentals—needed by many families—are rarely affordable to households below 100 percent AMI.

Figure 14: Affordability by percentage of AMI for market-rate multi-unit housing by bedroom count for new units built (2018-2025, Metro UGB)



Source: ECOnorthwest, Costar 2025, U.S. Department of Housing and Urban Development Income Limits, Portland Housing Bureau 2025 Utility Allowance Schedule, accessed https://www.portland.gov/phb/documents/2025-utility-allowance-schedule/download.

Rent affordability patterns vary around the region. New rental housing in the Central City and close-in Portland neighborhoods spans a wide range of affordability levels. New rental housing in suburban locations largely falls within the 80 to 100 percent AMI range.

Who can afford new for-sale homes?

Recently constructed ownership housing is only affordable to more affluent households. Nearly all (99 percent) new single-unit detached homes built and sold since 2022 are affordable only to households earning more than 120 percent AMI. New townhouses show a similar trend.

Condos and co-ops offer somewhat more affordable ownership opportunities for households earning between 100 and 120 percent AMI. However, relatively few condos and co-ops have been

built in recent years because of condo construction defect liability concerns.[4] New condo and co-op construction is happening almost exclusively in the City of Portland.

New ownership housing tends to be relatively less expensive in North Portland, outer Southeast and Northeast Portland, and Gresham. New ownership housing tends to be more expensive along the fringes of Forest Park and in Lake Oswego.

Regulated affordable housing production and supply

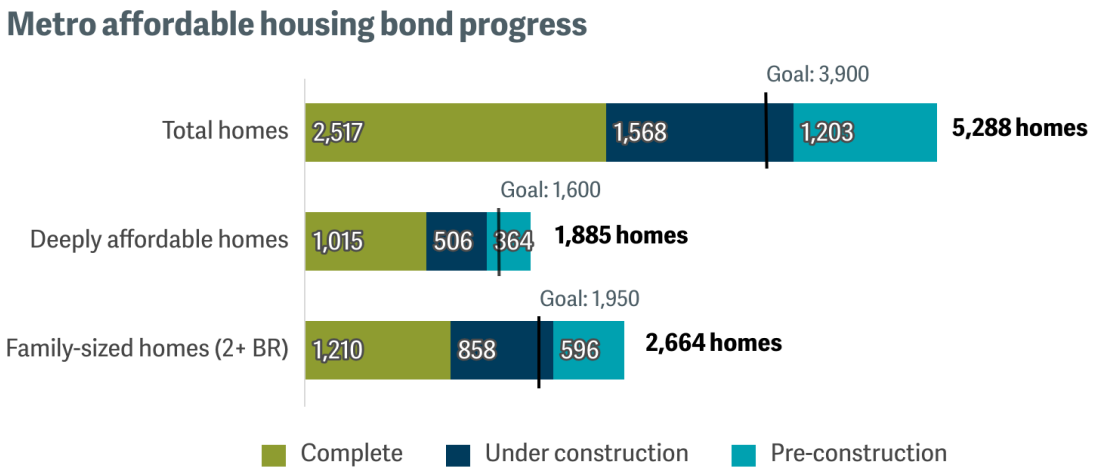
Like market-rate housing, the production of regulated affordable housing faces challenges such as rising construction costs, labor shortages, and permitting delays. Unlike market-rate housing development, the scale, timing, and location of affordable housing development are influenced less by market demand and more by the availability, structure, and predictability of public financial support.

Financing affordable housing is uniquely difficult. Because restricted rents are set below market levels, they rarely generate enough revenue to cover operating and maintenance costs, let alone repay the upfront investment and debt required to develop the project. Unlike market-rate projects, affordable housing is not designed to be resold for profit or leveraged against future appreciation. This structural gap means the private market alone cannot produce housing affordable to low- and very low-income households.

Public and community investment is therefore essential. Subsidies bridge the financing gap and make it possible to build and operate affordable housing without charging prohibitively high rents. Funding comes from a mix of federal, state, and local sources, including federal LIHTC, state programs, and local housing bonds. In the Portland region, the 2016 Portland Housing Bond is expected to create 1,859 affordable homes, while Metro's 2018 Affordable Housing Bond is projected to deliver more than 5,600 homes.

[4] HB 3746 (2025 session) reduced the period of limitation for a tort action arising from defective construction, alteration or repair to mitigate legal risks for builders.

Figure 15: Metro housing bond progress



As shown in Figure 15, the thousands of homes made possible by the 2018 Bond will be affordable to households earning 80 percent of the area median income (AMI) or less, with most designated for households making 60 percent AMI or lower, including a considerable number of deeply affordable (30 percent AMI) units as well as family-sized homes (2 bedrooms or lager).

This helps to address critical gaps in the region's supply of regulated affordable housing, which had historically skewed toward smaller unit sizes and 60 percent AMI units, as illustrated in Figure 16, which shows a breakdown of regulated affordability level for the region's regulated affordable housing units as of 2020, the last year when Metro completed an inventory.

Figure 16: Metro region regulated affordable housing inventory by regulated rent level

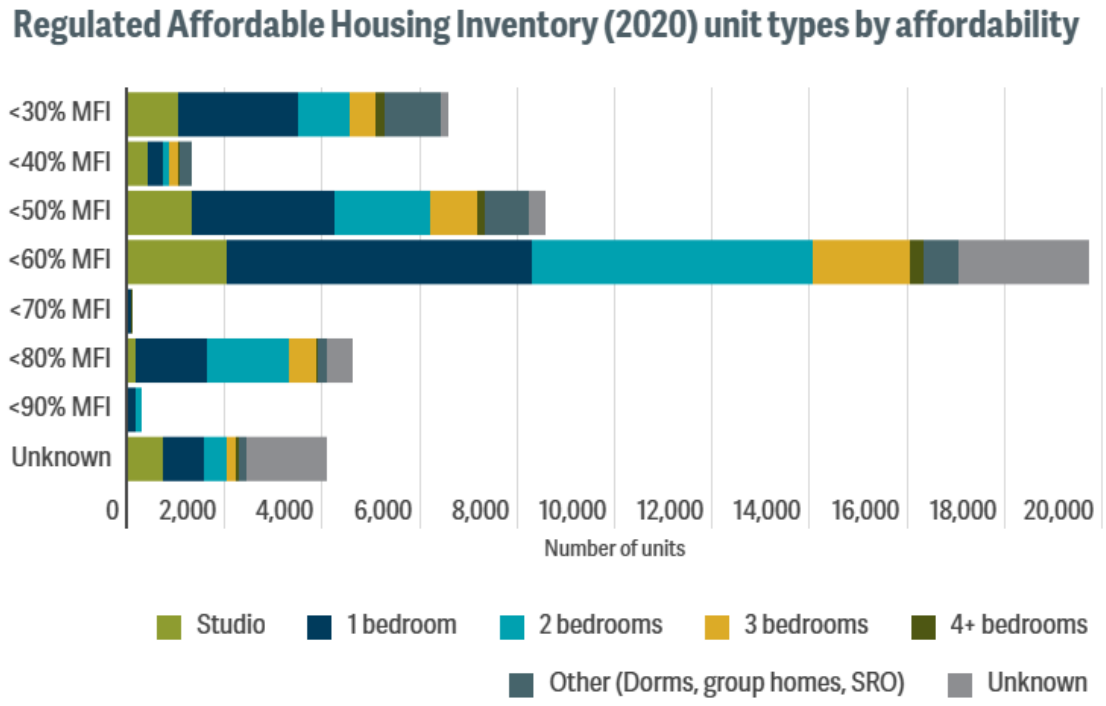
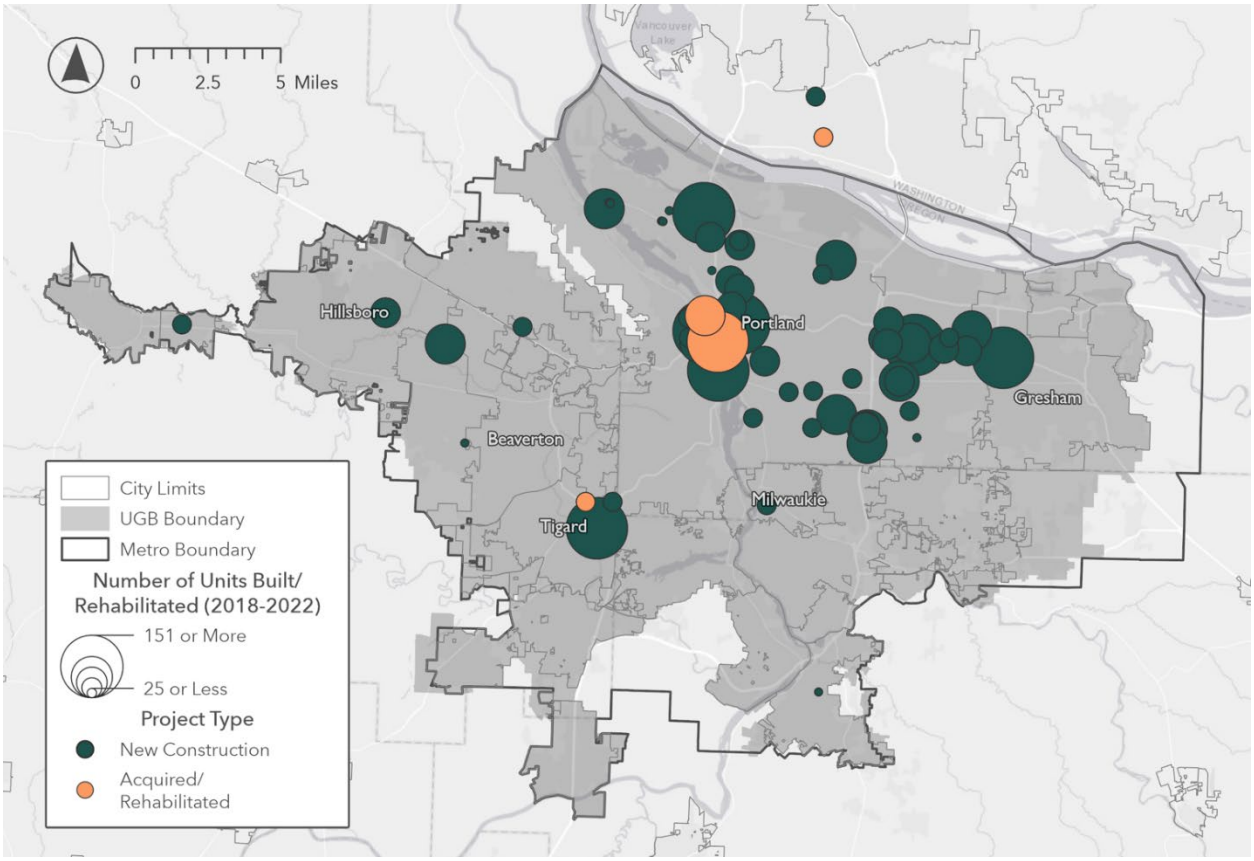


Figure 17: New and rehabilitated regulated affordable housing (2018-2022)



Source: Metro, summarized by ECOnorthwest

Accessibility

There is limited local data on the accessibility of existing housing units, but anecdotal evidence suggests that there are too few. Nationally, less than four percent of homes offer basic accessibility features (about 0.15 percent are fully wheelchair accessible) and only a third of units are potentially modifiable, having some structural features necessary for accessibility but in need of additional modifications (Scheckler, Molinsky, & Airgood-Obrycki, 2022). Additional accessible and adaptable housing, including buildings with elevators and single-level units, is needed, particularly in locations with access to healthcare, sidewalks, and transit, to accommodate our aging population.

Rental assistance

Rental assistance is a critical tool for preventing homelessness, stabilizing households, and supporting economic wellbeing. Rental assistance programs work by paying the gap between what a qualifying unit costs to rent, and the amount the household can afford based on their income. For this purpose, affordability is approximately 30 percent of a household's gross income. This is especially important for people who live with no income or very little income – for instance, older

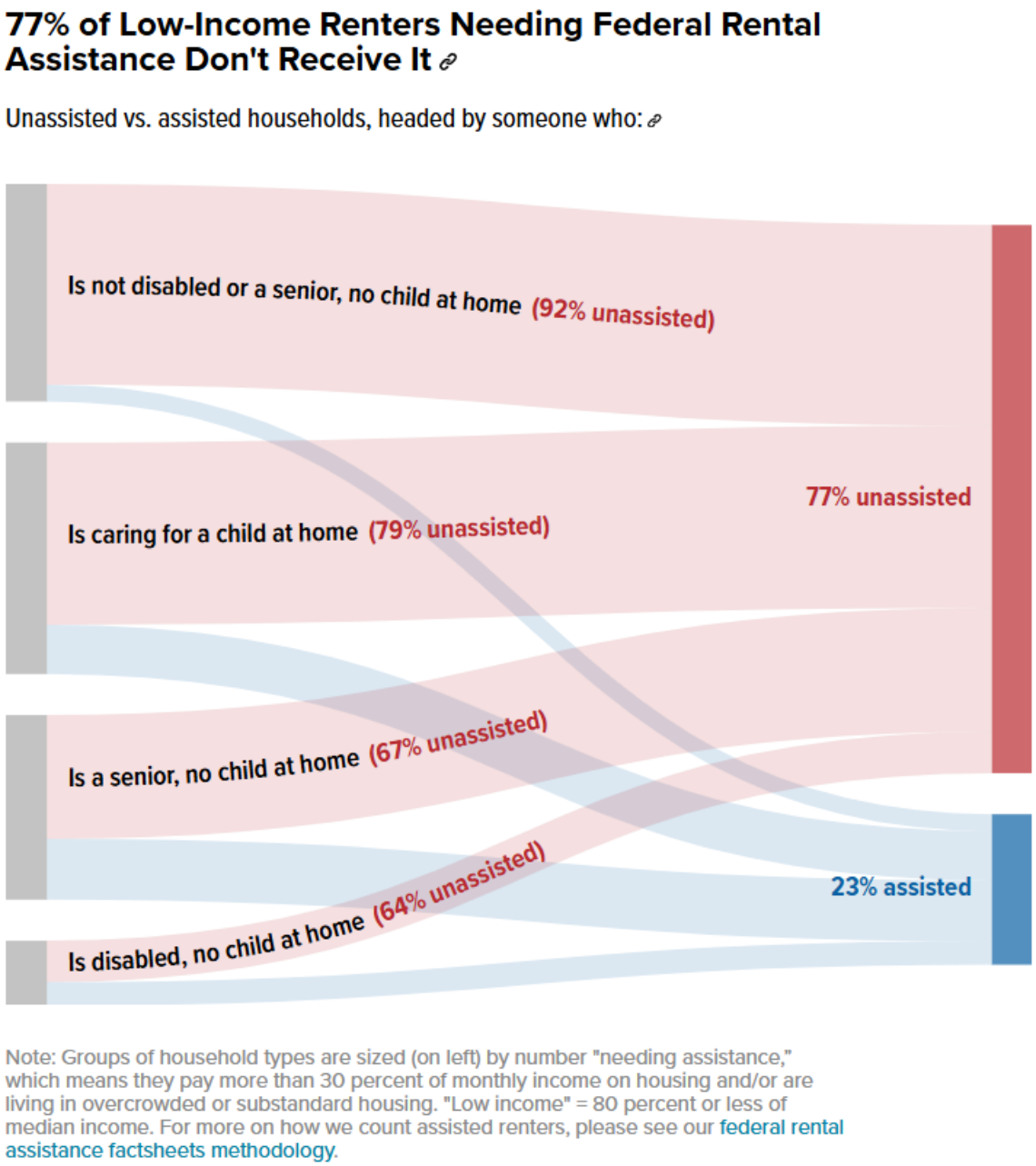
adults living on Social Security Disability Income – who cannot otherwise afford housing in most places.

Rental assistance payments are generally provided directly from a funding entity to the property manager or owner of the unit being subsidized. Differing types of rental assistance exist, but typically programs are divided into two primary types:

- Long Term Rental Assistance: Offers ongoing rental assistance to qualifying households, typically without pre-imposed time limits. These resources can be provided either as tenant-based, where the household is able to apply a "voucher" in a qualifying unit they find, or project-based, where a unit has this subsidy attached. Long term rental assistance is a required element of PSH.
- Short Term Rental Assistance: Offers time-limited support, typically for 24 months or less. These resources are most often used to prevent a household from imminently entering homelessness, or to support a household accessing housing after a period of homelessness. At the end of this period, tenants are expected to maintain rental payments through other means. Short term rental assistance plays a key role in stabilizing households experiencing acute, time-limited financial struggles.

Federal long-term rental assistance programs like the Housing Choice Voucher program (often called section 8), and state and locally funded rental assistance programs help households afford housing in both regulated affordable properties and in the private market. However, demand far exceeds supply: according to the Center on Budget and Policy Priorities, nationally, only 23 percent of households in need of federal assistance receive it as illustrated in Figure 18. This means waitlists in the Portland region are long.

Figure 18: Assisted and unassisted household (source: Center on Budget and Policy Priorities)



Long-term rental assistance can also support rental property development, by providing increased certainty of ongoing property stability and rent collections to developers and investors. Because of this increased certainty, developers can often access additional funds from lenders, decreasing public or other resources needed to finance properties, when there are long-term rental assistance contracts in place for a project.

BARRIERS TO HOUSING DEVELOPMENT

Market barriers

Housing production in the Metro region faces many of the same market challenges that are observable nationwide, making them difficult to counteract at the local level. Additional details about these barriers documented by ECOnorthwest can be found in Appendix 3.

Construction cost escalation

Inflation and labor shortages have increased costs. From 2012 to 2021, U.S. construction costs, including labor and materials, rose an average of 2.3 percent per year. Between 2021 and 2025, that rate jumped to 6.8 percent per year.

Rising cost of debt

Interest rate hikes have made borrowing more expensive. It is likely that this is affecting feasibility of development of housing affordable to middle-income households (81 – 120 percent AMI) the most. Building for this segment of the housing market has a narrow range for financial feasibility since developers cannot generally access public affordable housing financing, which is typically aimed at units affordable at or below 80 percent AMI.

Rising cost of land and infrastructure

Land values continue to increase, particularly in outlying parts of the region. Additional development-ready land could moderate land price increases. However, making raw land ready for development has proven challenging because of the high cost of providing infrastructure. For its part, Metro has approved every UGB expansion proposed by a city since urban reserves were put into place in 2011 and continues to provide grant funding to support city planning efforts for future expansion areas. While land is a necessary input for housing production, experience has shown that it alone will not guarantee that housing will be built or that the housing that gets built will match household budgets. Local Housing Production Strategies now play the role of identifying the actions necessary to promote housing production and fair housing.

Familiarity and risk perception for alternative housing types

Some developers and lenders that primarily build or finance traditional single-unit-detached homes are hesitant to pursue less common formats such as middle housing because of uncertainty about buyer interest.

Return-on-investment issues for small-scale projects

Small-scale projects can be less cost effective for developers because fixed costs cannot be spread across many units. Developer interviews indicated that soft costs, including permitting costs and developer overhead are harder to absorb on small projects.

Construction defect liability for condos

Unlike apartment buildings where a developer or owner often retains control of the building and leases out units, condominiums involve the sale of individual units to homeowners. This structure creates legal exposure for developers, as homeowners' associations can file construction defect

lawsuits—often years after completion of construction. This risk has limited condo construction even though it could provide more attainable homeownership options. To help address this issue, HB 3746 (2025) reduces the statute of limitations for construction defect actions for units in a planned community or condominium.

Rising insurance costs

Property insurance rates are rising as companies factor in climate change risks and increased costs of materials and labor for repairs or replacement. This increases operating costs for rental housing and monthly payments for homebuyers, exacerbating affordability challenges. Rising operating costs also increase perceived risk for lenders, which may result in higher borrowing costs or tighter lending standards, which further constrain feasibility.

Rising labor costs

Labor costs for roles that support development and ongoing operations of properties have been on the rise in recent years. Wages have increased faster in the real estate management industry compared to wages across all industries as well as service-providing industries. This increases construction and operating costs for rental properties that can result in the production of fewer homes or amenities and can also challenge the feasibility of projects all together.

Financial barriers to regulated affordable housing

In addition to the aforementioned market barriers, cost escalation has placed more strain on affordable housing development, compounding the already higher costs tied to complex financing structures, layered public funding requirements, higher legal fees and limited revenue streams to cover ongoing operating costs.

Limited availability and predictability of public subsidy

Regulated affordable housing requires public subsidy to achieve financial feasibility because there are limits placed on rents and purchase prices, which would otherwise reimburse and exceed the cost of development and construction in market-rate buildings.

Federal LIHTC are the largest source of funding for affordable housing development. These funds are accessed through a complex process, wherein state affordable housing finance agencies – Oregon Housing and Community Services (OHCS) in Oregon – award LIHTC to projects based on established selection criteria. The developers of these projects then find partners with significant federal tax liability who invest in the project to access the tax credits. These investors become limited partners in the project.

As of 2024, 93 percent of the rental projects supported by the Metro Affordable Housing Bond leveraged LIHTC. However, most LIHTC also depends on the availability of private activity bonds, the use of which is federally regulated. Historically, Oregon had surplus bonds. However, in 2021, OHCS paused some LIHTC applications because of oversubscription, leading to uncertainty and delays that have impacted project costs.

Recent federal changes to this program will improve LIHTC availability. However, because of the way the program is structured, LIHTC cannot cover a project's full costs. This means that all projects must also have a mix of additional funding sources—federal, state, local, private, and philanthropic—to move forward. The availability of funding that comprises the affordable housing capital stack can vary from one budget cycle to the next, complicating predictability and industry stability. At the local level, Metro bond funds are nearly expended, with no commensurate local funding source currently identified.

Rising costs are driving larger per-unit subsidy needs, straining available funding

Rising materials and labor costs that affect market-rate housing also strain affordable housing development. Between 2020 to 2024, the weighted average cost per unit for Metro bond funded developments increased by 30 percent.[5]

Complex funding layers increase time and risk

As noted, affordable housing projects typically require multiple funding sources. Each funding source carries its own application, compliance, and reporting obligations. Navigating this complexity adds significant soft costs, extends project timelines, and increases the risk of financing gaps.

Permanent Supportive Housing (PSH) development faces layered operational and financing challenges

In recent years, lenders have become more hesitant to underwrite deeply affordable projects, particularly those intended to support households exiting homelessness, because of the operational challenges and expenses of existing projects. Further, many housing operators have voiced concern about adding more of these housing types to their portfolio without adequate support, because of the risk they pose to their organizations' financial health. As a result, future PSH and service-enhanced affordable development may require higher levels of public subsidy and ongoing risk mitigation support.

Lack of dedicated preservation funding risks loss of existing affordable housing stock

Many regulated affordable housing properties face expiring income restrictions and deferred maintenance needs. However, few public funding sources are available to support preservation strategies such as acquisition, recapitalization, and rehabilitation.

Limited coordination between housing and health/social services

Many affordable housing developments are designed to serve residents who would benefit from supportive services, including households exiting homelessness and those experiencing behavioral health challenges. However, funding for these services and the ongoing rental assistance needed to support these households is often disconnected from housing development financing, creating

[5] Metro Affordable Housing Bond 2024 Annual Report.

uncertainty about service availability when projects open and increasing the risk of tenants missing rent payments and facing eviction.

Smaller-scale developments don't achieve economy of scale

Despite demand for smaller-scale affordable rental developments (<20 units), public funders and investors sometimes maintain policies and funding guidelines that decrease the financial viability of smaller-scale developments.

Placing limits on per-unit costs helps spread scarce resources across more developments but is an example of a policy that can make it more difficult to develop smaller multi-unit properties. Depending on the jurisdiction, some costs – for instance, "soft costs" like legal fees, permitting and recording costs, surveys and inspections – are the same, regardless of the number of units the project will produce. This means that projects with fewer units may have a higher per-unit cost than a larger development, making them a less appealing investment for a public funder.

Adding to this challenge, these properties may struggle to maintain ongoing operations or services because of a lack of scale. While a medium-sized or larger property could support an on-site service coordinator, property manager, or maintenance staff at a relatively low cost-per-unit, for smaller scale developments these types of supports may need to be split across multiple properties.

Non-market and structural barriers

In addition to market and funding feasibility challenges, housing production across the Metro region is also constrained by a range of non-market and structural barriers. These include zoning and entitlement restrictions, site-level and infrastructure challenges, and broader regulatory and governance dynamics.

Barriers also vary geographically. High-opportunity neighborhoods often maintain the most restrictive zoning and entitlement processes, while infrastructure barriers dominate in expansion areas. Addressing these patterns will require place-specific solutions.

Zoning and design standards

Restrictive zoning

While state reforms over the past several years (such as HB 2001 [2019]) have required jurisdictions to remove regulatory barriers to middle housing and affordable multi-unit development, potentially problematic standards remain in some areas. Parking minimums, maximum densities, setbacks, landscaping and open space requirements can prevent compact and cost-effective multi-unit housing development. In commercial zones, ground floor commercial requirements can increase development costs that may not be matched by viable rents.

Too many zoning districts: In some jurisdictions, an excessive number of zoning districts and overlay zones creates additional complexity. Portland's zoning code, for example, includes dozens of base and overlay zones with varying use, height, and design standards.

Zoning and market mismatch: In some areas, zoning allowances do not align with what the private market can feasibly deliver. This mismatch typically occurs in two ways:

> ***Under-zoning*** *in high-demand areas*. For example, close-in neighborhoods zoned for lower density development (primarily single-unit homes and some middle housing), despite strong market demand for more housing types.
>
> ***Over-zoning*** *in lower-demand areas.* Some suburban centers and corridors are zoned for multi-story, mixed-use development, but market rents are insufficient to support the higher construction costs for these types and scales of development. Zoning in these areas may mandate building features such as ground-floor retail or structured parking that add cost and risk and may render development infeasible, particularly for affordable housing projects. In some cases, limited amenities and older, auto-oriented patterns further reduce market demand.

Seismic upgrade requirements: Redeveloping older buildings in Portland can trigger costly seismic retrofits under city code, which often makes adaptive reuse financially infeasible. These requirements have limited opportunities to repurpose older buildings that could serve lower-income renters and make some existing residential buildings too expensive to rehabilitate. Without additional subsidy, many of these structures will remain underutilized and at risk of earthquake damage.

Process and procedures

Permit processing delays and lack of predictability: Some jurisdictions, especially smaller cities, lack sufficient staff to process permits and inspections quickly. Delays can jeopardize tax credits and other time-sensitive funding. Smaller jurisdictions may also need to coordinate with counties or special districts, which adds complexity and can slow approvals.

Appeals and public opposition. Despite state requirements to allow housing through clear and objective standards, development often requires some adjustments that can trigger discretionary review processes. In those situations, public opposition can pose a significant barrier, particularly in high-opportunity neighborhoods where affordable housing is most needed.

Fees and SDCs

Fees, including System Development Charges (SDCs) and permit fees, can be a big contributor to project costs. However, in Oregon, SDCs are an important source of funding to pay for the pipes, streets, schools, and parks needed to support housing development. This reliance on SDCs has several causes, including:

- Decreasing federal investment in local infrastructure
- Public sentiment that growth should pay for itself
- A lack of a sales tax in Oregon
- Statutory limits on increases in property taxes in Oregon

In the Metro region, the average SDC cost is about $27,000 per unit (League of Oregon Cities, 2023). Some SDCs, particularly for recent UGB expansion areas, can approach $45,000 per unit.

Smaller entry-level homes, lower-cost middle housing and apartments, and communities with weaker market demand are disproportionately affected by SDCs because the SDCs represent a proportionally larger share of these homes' prices. High-end, single unit detached housing is generally impacted least.

Site-Level Barriers

Fragmented landownership and absentee landowners

Fragmented land ownership, particularly in areas that have been urbanized for many decades, can be a barrier to housing production. Developers must either consolidate multiple lots which increases cost and risk, or accept smaller, less efficient projects. Land banking and public site assembly are important tools to help create viable development opportunities.

Infrastructure constraints in greenfields

Infrastructure funding is often a primary constraint for housing development in UGB expansion areas. Roads, sewers, water, and parks require massive upfront investment, and without them, housing cannot be built. Much of the new infrastructure to serve greenfield development is funded by developers, either directly (through exactions) or indirectly (through SDCs or similar fees), which can increase development costs.

Greenfield challenges

In addition to high upfront infrastructure costs, housing delivery in greenfield areas can face additional structural barriers, such as governance challenges, including annexation and inter-jurisdictional coordination.

In early phases, new communities often lack amenities (with homes often arriving before retail, transit, or schools), which can reduce livability and make it harder to deliver higher-density housing until the amenities are available.

Infill challenges

The costs of site acquisition, demolition, environmental cleanup, and required infrastructure upgrades make many infill projects that are allowed by zoning financially infeasible.

Brownfield sites

Brownfields can offer potential for reuse with housing but face significant barriers, including:

- Environmental remediation costs are highly variable and create financial uncertainty
- Liability risks deter investment and complicate site acquisition transactions
- Financing is challenging, with lenders requiring extensive due diligence

- Public subsidies for remediation are limited and inconsistent

Governance and Capacity Barriers

Fragmented governance and inconsistent policies

Complex governance structures, spanning three counties, 24 cities, and multiple special districts, create inconsistent housing policies and fragmented implementation. Housing needs are regional, but solutions remain largely local and often uncoordinated. The state's OHNA program, this RHCS, and city and county Housing Production Strategies represent important steps toward regional alignment, but sustained coordination remains critical to meeting housing targets.

Limited public sector capacity

Some jurisdictions in greater Portland lack the staffing capacity and technical expertise to implement complex housing reforms or manage affordable housing programs. Capacity constraints are particularly acute in smaller jurisdictions, which may not have housing specialists on staff.

Equity and Housing Choice Barriers

Displacement from emerging high opportunity areas

Many low-income residents, particularly communities of color, have been displaced from areas that have become high-opportunity neighborhoods. Recent initiatives, such as Metro's equitable development strategies for future transit corridors, aim to mitigate these impacts through place-based planning, but progress will require stronger tenant protections and continued efforts to expand middle housing options, land acquisition and banking in emerging high-opportunity areas, and continued investment in the development and preservation of affordable housing.

Lack of subsidized or lower-cost housing in high opportunity areas

Wealthy, high opportunity enclaves sometimes offer few lower-cost homes. There is little financial incentive for private developers to build low-cost housing in higher-income communities when higher-cost housing results in greater profits and less neighborhood opposition. In addition, land costs are often higher. Government intervention may be needed to create opportunities for housing serving a range of incomes in high opportunity areas.

Much affordable housing is in lower-amenity neighborhoods

High land costs, limited land availability, the location of federally designated Qualified Census Tracts, and community opposition in high-opportunity areas have historically pushed more affordable housing development to lower-cost parts of the region. The result is that many regulated affordable homes are sited in neighborhoods with fewer amenities and higher concentrations of poverty.

Public funders' project selection criteria and subsidy guidelines can support better integration. The Metro Affordable Housing Bond has helped by setting goals to build new housing in locations with access to transit and amenities.

Limited accessible housing and barriers to aging in place

Nationally, fewer than four percent of homes offer basic accessibility features, and only 0.15 percent are fully wheelchair accessible. About one-third of units are potentially modifiable but would require renovations (Scheckler, Molinsky, & Airgood-Obrycki, 2022). In Oregon, there is no comprehensive inventory of accessible (Type A) or adaptable (Type B) units. ECOnorthwest analyzed available data on recent multi-unit developments in the state and estimated that up to 50 percent of newly built units may meet Type B standards and about two percent may meet Type A standards. These estimates vary by region and exclude senior-focused or federally funded affordable housing, which are more likely to include accessible features.[6]

While building codes require some accessible units, these are typically found in newer, elevator-served apartments, housing that is often unaffordable for low-income households and potentially less attractive to older adults who may wish to age in place.

Shortage of rentals for larger families

Larger affordable rental homes for families, including multigenerational and extended families, are scarce. Public engagement has highlighted that households of color are more likely to live in multigenerational arrangements, yet the housing market offers few large-family rentals to accommodate them. In response to this gap, the Metro Affordable Housing Bond prioritized family-sized units. As of 2024, about half of all bond-funded homes have two or more bedrooms.

Complex application fee, and deposit requirements

Complex or strict rental housing application processes continue to exclude many households. Standard rental screening criteria (e.g., high income-to-rent ratios, strict credit score minimums, criminal background checks, and extensive documentation) can disproportionately disqualify low-income families, immigrants, and people recovering from past instabilities. Language, literacy, and mobility barriers further impede applicants.

Moreover, those applying for rental housing may be subject to substantial upfront costs to access housing. Most housing operators charge application fees, making applying for multiple units challenging for those with limited resources. If a household does qualify for a unit, there may be substantial lump sums due at lease signing – often a security deposit and first month's rent. These costs can be thousands of dollars, even for an affordable unit. If a household has not yet received a reimbursement of previous security deposits or does not have access to additional resources (e.g. savings, loans, public assistance) the cost to access housing can be too great.

Inadequate funding for population-specific resident support services

Veterans, domestic violence survivors, individuals exiting homelessness, youth aging out of foster care, older adults, and other priority populations face distinct housing challenges that require

[6] ECOnorthwest. *OHNA Rulemaking – Potential Compliance Pathways*. Prepared for the Oregon Department of Land Conservation and Development. July 2025.

tailored housing models and services. Across these groups, existing programs are fragmented, underfunded, and insufficient to meet demand.

Gaps in fair housing enforcement, renter protections, and tenant/landlord education

While federal, state, and local laws prohibit housing discrimination and require reasonable accommodation, awareness and enforcement of these protections vary across jurisdictions and populations. The Fair Housing Council of Oregon reports receiving approximately 1,000 complaints annually from tenants in greater Portland. Statewide, the largest shares of bona fide complaints were based on disability, source of income, race, and sex (Fair Housing Council of Oregon, 2025). While discrimination persists locally and nationally, funding to support fair housing education, enforcement, and advocacy is being cut at the federal level.

Limited navigation and culturally specific provider networks

People of color, immigrant, and refugee communities often desire housing services delivered through trusted, culturally specific organizations because of a legacy of discrimination and mistrust of mainstream systems, and the failure of mainstream organizations to adapt their services to community needs. Despite state and regional efforts to better align funding opportunities with culturally specific and responsive investments, there remains a need to expand partnerships with culturally specific nonprofits, increase language-accessible navigation support, and fund targeted outreach efforts. It is also necessary to continue development of culturally responsive housing options that better meet the needs of underserved communities.

Lack of options for middle-income households: Middle-income households (earning 81–120 percent of AMI) face growing instability but are underserved by the private market. More work is needed to remove barriers and support incentives for "middle housing" development and to continue to expand public investments in alternative homeownership projects, such as those supported by the 2018 bond and state Local Innovation and Fast Track (LIFT) funds.

ENGAGEMENT PROCESS FOR DEVELOPING THIS RHCS

The engagement approach for developing Metro's RHCS focused on outreach and coordination with many individuals, governments and organizations. These efforts have centered on understanding barriers to housing production and equitable access and collecting ideas from a variety of perspectives about what Metro can do to fill regional gaps and support local work. The aim of this outreach was to foster stronger relationships with our partners and to create an effective strategy that can be feasibly implemented over the next six years.

Engagement goals and objectives

- The proposed actions in Metro's RHCS are informed by the barriers and needs identified by jurisdictions, industry experts, and community leaders.
- The proposed actions build upon lessons learned from Metro's existing programs and initiatives.

- The engagement process leads to a regional strategy that is responsive to the OHNA mandate and the shared goal of promoting housing production, affordability and choice.
- Engagement activities facilitate new connections, relationships and points of coordination between entities working to meet housing needs across the region.
- The engagement process for Metro's first ever RHCS informs the resources and approaches for future RHCS cycles so that it becomes integral and valuable to all entities in the region working to meet housing needs.
- Following the creation of the RHCS, the project team will reflect on project outcomes, identify areas for improvement and set up the next RHCS for success.

Key engagement phases and topics

There were several phases of engagement during the development of the RHCS. The primary intent of these phases was engaging with jurisdictional staff implementers, practitioners, advocates, service providers, and housing professionals with firsthand experience of the challenges in the region to hear their perspectives and ideas for actions for Metro to take.

The primary outcomes of the engagement activities were:

- A list of barriers to housing production and access
- A list of actions for Metro to take to promote housing production, affordability, access, and choice (the full list of action ideas generated through engagement can be found in Appendix 7)
- An evaluation framework to assess each action's impact on housing preservation and production, impact on affirmatively furthering fair housing, and organizational impact on resources and implementation feasibility.

More detailed information about each group involved in engagement is found in Appendix 6: Equitable engagement summary.

<u>Phase 1: Pre-scoping research and project preview (October 2024 – February 2025)</u>

During the initial phase of the project, the project team focused on conducting foundational research and early outreach to shape the scope of work and engagement plan. This work included a review of existing Housing Production Strategies (HPS) that identify Metro as an implementation partner and interviews with several local jurisdictions to hear initial thoughts about the RHCS and gauge interest in future engagement. Additional interviews with partner organizations centered on assessing interest in participating in the RHCS development and gathering early input on how the strategy might support their ongoing housing efforts.

Additionally, staff reviewed key findings from recent engagement efforts conducted as part of Metro's housing work, including Permanent Supportive Housing and Supportive Housing Services Implementation Engagement, Affordable Housing Investment Opportunities Community Engagement, and Affordable Housing Investment Opportunities Technical Engagement (see Appendix 6 for summaries of these engagement efforts). This scan of recent Metro housing

engagement helped inform the RHCS engagement plan by building on and leveraging relevant information and insights already shared by key industry stakeholders and experts.

Alongside this research, Metro introduced the project to MPAC and MTAC. Internal planning tasks included finalizing the project's scope of work, engagement plan, consultant contract, and Racial Equity Framework.

Activities:

- Pre-scoping research and interviews
- MTAC meeting number one
- MPAC meeting number one

Phase 2: Scope of work and engagement plan (February 2025 – April 2025)

Following pre-scoping research, the project team presented the proposed scope of work and engagement plan to a range of advisory and oversight bodies, including the Metro Council, CORE, MPAC, and MTAC. Additionally, an internal cross-departmental group convened to introduce the project more broadly within Metro. Staff reviewed the agency's existing efforts to support needed housing development, identified gaps in that work, and began collecting preliminary ideas for actions that could be incorporated into the RHCS. During this stage of engagement, the project team began to receive requests to present this work to outside groups such as the Washington County Planning Directors and 1000 Friends of Oregon. Responses to these requests resulted in additional opportunities to present this project and receive feedback.

Activities:

- Metro Council work session number one
- CORE meeting number one
- MTAC meeting number two
- MPAC meeting number two
- Internal cross-departmental Metro staff meeting number one
- Washington County Planning Directors meeting
- 1000 Friends of Oregon Land Use Leadership Initiative meeting
- Project web page created

Phase 3: Metro's roles in housing production, coordination, and access and barriers to meeting housing needs (April 2025-July 2025)

In this phase of engagement, events focused on understanding barriers to housing production and access and summarized these barriers into three categories – regulations and systems, market and financing, and equity and housing choice. Additionally, participants were asked to share their perspectives on the importance and impact of Metro's various housing-related roles on their own

work and discuss the areas in which they would like to see continued investment. Some of these conversations fed into new ideas for Metro to consider as part of the ongoing list of brainstormed actions. A key goal of this phase was to better understand how regional efforts can complement and support local housing initiatives through tools, capacity building, funding, convening, and other mechanisms.

An online survey tool was created during this period to provide a participation method for people who couldn't attend meetings. Feedback from that survey was combined with information collected during meetings.

Activities:

- Implementers Work Group meeting number one
- Clackamas County Coordinating Committee meeting number one
- Coalition member meeting: Oregon Smart Growth
- Coalition member meeting: Housing Oregon (an industry group of organizations that build, finance, and support affordable housing)
- Coalition member meeting: Home Building Association
- Focus group: Housing advocacy and provider coalitions
- Focus group: Development and financial professionals with experience in innovative approaches to affordable housing outside of LIHTC
- Focus group: Urban Native community-based organizations
- Metro Council work session number two

Phase 4: Preliminary list of actions and draft evaluation framework (May 2025 – July 2025)

Building on earlier engagement, this phase involved collecting ideas for specific actions that Metro might take to support housing production, affordability, and choice. These actions were considered through the lens of Metro's unique capabilities and responsibilities, with a focus on what is feasible and well-aligned with existing regional efforts or a new work program that would meaningfully address unmet needs. The feedback gathered during these activities also informed the development and refinement of an evaluation framework to filter and sort proposed actions.

Activities:

- Internal cross-departmental Metro staff meeting number two
- Implementers Work Group meeting number two
- MTAC meeting number three
- MPAC meeting number three
- CORE meeting number two
- Washington County Coordinating Committee (WCCC) and WCCC Transportation Advisory Committee

Phase 5: Evaluated and shortened list of actions and additional information about priorities (July 2025 - August 2025)

These engagement events shared results of the evaluation process and sought feedback on the resulting list of prioritized actions. The goal of this phase was to identify the most widely supported actions and continue to add details to the resulting "short list" to capture potential tradeoffs based on project budget and staffing impacts. Feedback during this engagement phase helped clarify community, jurisdictional, and internal priorities ahead of the public comment period.

Activities

- Implementers Work Group meeting number three
- MTAC meeting number four
- MPAC meeting number four
- Metro Council work session number three

Phase 6: Draft RHCS, public comment period, and preparation for adoption (September 2025 – December 2025)

The final phase of the project will focus on drafting the RHCS and preparing it for adoption. A public discussion draft, published in September, kicks off the public comment period to gather any final input on the draft strategy. The discussion draft will be shared with all the organizations and individuals that participated in the process and will be made available on the project web page for comment. This feedback, along with any final comments from MTAC and MPAC will be incorporated into the final version of the RHCS. Staff will present a final document to the Metro Council for consideration by the end of December 2025.

Activities:

- Implementers Work Group meeting number four
- Public comment period
- Share project information at Housing Oregon Conference
- MTAC meeting number five
- MPAC meeting number five
- MTAC meeting number six – recommendation of final strategy to MPAC
- MPAC meeting number six – recommendation of final strategy to Council
- Metro Council work session number four
- Metro Council meeting to consider a resolution to adopt the final RHCS

Summary of involved stakeholders

Implementers Work Group

Planning staff from the following jurisdictions were invited to participate in the Implementers Work Group. For larger jurisdictions with dedicated housing staff, an additional representative was invited, as indicated below.

- Beaverton – planning and housing staff
- Cornelius

- Fairview
- Forest Grove
- Gladstone
- Gresham – planning and housing staff
- Happy Valley
- Hillsboro – planning and housing staff
- Lake Oswego
- Milwaukie
- Oregon City
- Portland – planning and housing staff
- Sherwood
- Tigard
- Troutdale
- Tualatin
- West Linn
- Wilsonville
- Clackamas County
- Multnomah County
- Washington County
- Housing Authority of Clackamas County
- Washington County Housing Authority

Coalition member meetings

- Housing Oregon
- Home Building Association of Greater Portland
- Oregon Smart Growth

Focus groups

Housing advocacy and provider coalitions:

- Fair Housing Council of Oregon
- Welcome Home Coalition
- Here Together
- Coalition of Communities of Color
- Unite Oregon
- AARP

Development and financial professionals from the following organizations with experience in innovative approaches to affordable housing outside of LIHTC:

- Related NW

- Edlen & Co
- Community Development Partners
- Central Bethany Development
- Network for Oregon Affordable Housing (NOAH)
- ECOnorthwest

Urban Native community-based organizations:

- NAYA
- NARA
- Future Generations Collaborative
- Native Wellness Institute

Regional committees

- Washington County Planning Directors
- 1000 Friends Land Use Leadership Initiative (LULI)
- Clackamas County Coordinating Committee (C4 Metro Subcommittee)
- Washington County Coordinating Committee (WCCC and WCCC TAC)

Metro Council and advisory committees

- Metro Council
- MTAC
- MPAC
- CORE

EVALUATION OF POTENTIAL RHCS ACTIONS

Metro, in collaboration with its consultant team and through an engagement process, developed an approach for evaluating potential actions for inclusion in the RHCS. This evaluation framework assisted Metro in identifying actions that fit best with Metro's roles and responsibilities, match available or possible resources, aid local jurisdictions, and promote housing production and affirmatively further fair housing (AFFH). The evaluation framework provides a means of scoring potential actions and ensuring attention to a variety of topics, including fair housing issue areas identified in Oregon Administrative Rules.[7]

A weighted scoring system, summarized in Figure 19, places a high value (50 percent) on outcomes and was used to assess a refined list of actions. According to previous analysis in the 2024 UGR, the greatest needs are for affordable housing and middle-income housing. The two categories used in the evaluation process (housing production and AFFH) address affordability and middle-income housing.

[7] These Fair Housing issue areas apply to city and county Housing Production Strategies. Though they do not, as a matter of law, apply to Metro's RHCS, they were referenced in the RHCS action evaluation process as a useful means of addressing the topic of fair housing.

The remaining 50 percent of scoring is focused on legal and political viability, technical and financial feasibility, and whether the action is appropriate for Metro to undertake as the regional government.

Figure 19: Weighted scoring approach for RHCS action evaluation

C. Operational considerations and impact	
15%	C.1 Legal and political viability is high
15%	C.2 Implementation is straightforward or manageable within existing resources (staff and funding)
5%	C.3 Feasible to implement within the 6-year timeframe
15%	C.4 Metro is in the best position to conduct this activity; few organizations are currently working in this space
50%	C.5 Improves regional outcomes around housing production, accessibility, affordability, and AFFH

Having scored each potential action, Metro and its consultant team then reviewed the list of higher-scoring actions to ensure that a variety of housing production, preservation, and fair housing interests were addressed. Several actions that otherwise had scored lower were highlighted because they addressed the topics depicted in Figure 20 and were not unreasonable to implement. Additional details about evaluation results may be found in Appendix 4.

Figure 20: Topic categories used in the process of evaluating potential RHCS actions

A. Impact on housing production			
Assists cities with housing work	Increases housing production	Preserves and maintains housing that is affordable	Supports development of a mix of housing types (e.g. multifamily, ADUs, middle housing)

B. Impact on Affirmatively Furthering Fair Housing			
Supports accessible and adaptable housing	Supports access to affordable rental housing	Supports access to affordable homeownership	Supports access to community assets and mitigation of exposure to harms
Addresses issues associated with historically underserved or marginalized communities and protected classes	Addresses and disrupts patterns of segregation and their correlation with concentrated areas of affluence and poverty	Supports housing stability, anti-displacement and displacement mitigation	Supports access to permanent housing to resolve homelessness

ACTIONS METRO WILL UNDERTAKE

Analyses conducted in the 2024 UGR as well as for this RHCS (e.g., Appendix 3) identified multiple barriers to housing production, affordability, and fair housing. The actions that Metro will continue to take, and new actions described in this RHCS, are intended to address those barriers.

Metro's current and past efforts related to housing

Statutes instruct Metro, when completing its RHCS, to review and consider measures already implemented to promote the development of needed housing. That review has informed Metro as it considered possible actions for inclusion in the 2025 RHCS and can be found in Appendix 5.

Metro's engagement in promoting diverse housing dates to its origins in the late 1970s. Before Metro was formed, the Columbia Region Association of Governments (CRAG) had an even longer history. Metro's more recent history (2000s forward) illustrates its shift from its role as a policymaker and regulator towards its role as a convener, provider of data and analysis, advocate for best practices, and administrator of regional funding.

Metro's past and current work in the housing sphere can be grouped into several general categories:

- Regional policies
- Regulation
- Legislative advocacy and participation in rulemaking
- Sharing best practices and information
- Partnerships and collaboration
- Funding
- Broad community engagement and a focus on anti-displacement activities in corridor planning and the Metro Transit-Oriented Development program

Most notable among Metro's ongoing actions are the following, which emphasize Metro's focus on regional funding and coordination of that funding with policies:

- Regional affordable housing bond
- Supportive Housing Services funding
- 2040 Planning and Development Grants that support local housing planning
- Anti-displacement activities in corridor planning and the Transit-Oriented Development program

Legal limitations on Metro's actions

As additional context for the roles that Metro has filled in the past and what it can do in the future, it is worth noting at least two legal constraints on Metro's regulatory authority that guide Metro's focus on non-regulatory approaches. First, Metro's voter-approved Charter includes a prohibition

against Metro requiring residential density increases in single-family neighborhoods within the existing UGB. To some extent, this prohibition has been rendered moot by state requirements for local jurisdictions to allow middle housing in neighborhoods. However, this Charter provision does still bar Metro itself from requiring additional density in neighborhoods.

Second, Oregon Revised Statute 197A.465 (2) states that Metro may not adopt land use regulations that have the effect of:

- Establishing the sales or rental price for a housing unit or for residential land
- Requiring that a housing unit or residential land be designated for sale or rent to a particular class or group of purchasers or renters

Legal context for the RHCS

When the legislature created the OHNA program, it intentionally distinguished between regional Housing Coordination Strategies such as Metro's RHCS and local Housing Production Strategies. The program names themselves differentiate between regional coordination roles and local production roles. Additional differences in the way the two programs are described in statutes reflect Metro's unique role related to housing.[8]

The Oregon Land Conservation and Development Commission has adopted administrative rules implementing the OHNA program. While there are rules that direct cities regarding their Housing Production Strategies, there are no administrative rules directing Metro's RHCS. In support of the spirit of the OHNA program, Metro has referred to rules pertaining to city Housing Production Strategies for general guidance where applicable.

Equitable engagement

OAR 660-008-0200(1) describes community engagement requirements for cities when completing a Housing Production Strategy. While those rules do not apply to Metro's RHCS, Metro has conducted engagement in a manner consistent with these rules, but with an emphasis on coordinating with local governments, affordable housing and service providers, and housing developers. A summary of Metro's equitable engagement approach can be found in Appendix 6.

Actions to meet current and future housing need

As previously noted, when the legislature created the OHNA program, it intentionally omitted Metro from the state's housing production targets, leaving Metro responsible for conducting its own regional housing needs analysis in its urban growth management decisions. This legislative framework retained Metro responsibility for ensuring long-range regional growth capacity inside the UGB and added the responsibility of coordinating housing related activities with a regional perspective.

[8] For instance, the statute calls on Metro to "…include a list of actions… that the regional entity shall undertake to promote… actions that affirmatively further fair housing." This indicates an understanding that Metro's actions are several steps removed from activities, such as zoning, that are typically subject to Fair Housing laws.

OAR 660-008-0200(2) describes requirements under which cities must address housing production targets by affordability bracket that are set by the state under the OHNA program. These administrative rules make sense for the level of specificity achieved in a city Housing Production Strategy regarding housing types, characteristics, locations, affordability levels, fair housing issues, and the populations that may receive benefits or burdens from city actions.

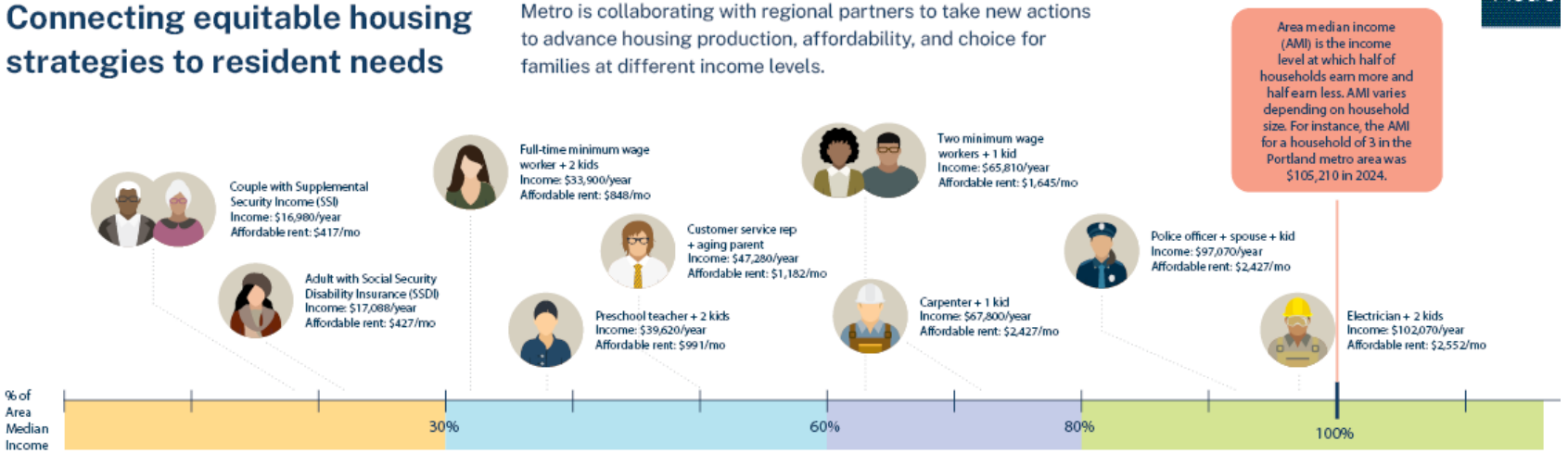
Because of the indirect nature of many of the actions that can be taken by Metro, it is not always possible for this RHCS to make clear connections between its existing and proposed actions and specific housing production numbers or other outcomes such as housing characteristics, housing locations, and fair housing outcomes that may be achieved. In many cases, actions to be taken by Metro are exploratory and outcomes are unknown at this time. For example, Metro's RHCS includes an action to explore the possibility of a regional land bank for housing. While this kind of study may highlight topics and facilitate policy discussion around priorities related to housing types, locations, characteristics, affordability, and fair housing outcomes that a land bank strategy might seek to achieve, the study itself will not be of direct benefit or burden to any particular population. Those impacts would depend on subsequent policy framework development and effective implementation of a land bank, pending Metro Council direction. In other cases, Metro's action provides a foundation for work to be done by others. An example of that kind of actions is local Housing Production Strategy Implementation Funding and Support.

Nonetheless, some RHCS actions generally focus on a range of affordability levels. The following infographic indicates which income groups are most likely to be addressed by the actions included in this RHCS.

REGIONAL HOUSING COORDINATION STRATEGY

Connecting equitable housing strategies to resident needs

Metro is collaborating with regional partners to take new actions to advance housing production, affordability, and choice for families at different income levels.



0-30% AMI

The private market does not provide housing affordable at this level. Units require deep construction subsidies and ongoing operating support, such as rental assistance vouchers, to remain affordable. Many households also benefit from on-site support services, which require additional funding or resources.

30-60% AMI

The private market does not provide housing at this income level. Regulated affordable units require construction subsidies but can typically operate without ongoing rental vouchers.

60-80% AMI

The private market provides limited new rental housing in this range, generally smaller units such as studios and one- bedrooms. This group also relies heavily on older rental housing sotck that has "filtered" down to become more affordable.

80-120% AMI

The private market provides rental units in a wider variety of sizes at this income level. It also begins to offer limited ownership opportunities, primarily condominiums, though the vast majority of options remain rentals.

The RHCS actions listed here will be advanced over the next six years (2026-2031)

0-30% AMI

ACTION #10: Improvements to voucher and other rental assistance policies and implementation.

0-80% AMI

ACTION #16: Affordable housing funding feasability

ACTION #9: Affordable housing operational stabilization strategy

ACTION #11: Regional affordable housing inventory and listing service

ACTION #5: Equitable access to regulated affordable housing

ACTION #6: Community co-design

ACTION #7: Innovative approaches

0-120% AMI

ACTION #1: Housing pre-development and technical assistance

ACTION #3: Local HPS implementation funding and support

ACTION #12: Regional land bank plan

60-120% AMI

ACTION #8: Middle housing assessment

ALL INCOMES

ACTION #2: Expand funding for the brownfield grant program

ACTION #4: Regionally available pool of housing professionals for technical assistance and staffing support

ACTION #13: Permitting dashboard

ACTION #14: Urban growth management functional plan housing audit

ACTION #15: Coordinated advocacy agenda

Income data source: HUD 2024 Median Income Percentages for the Portland Vancouver-Hillsboro MSA, SSDI 2024, SSI 2024, BLS May 2024. Affordable monthly housing costs are calculated at 30 percent of monthly income.

Overview of new actions to be taken by Metro

Table 1 lists the actions that Metro will undertake in its six-year HCS cycle. Per Oregon Revised Statutes 197A.365 (6)(e), this table summarizes:

- The schedule for adoption or completion and implementation, if applicable (though the Metro Council will adopt this RHCS, many individual actions will not require subsequent Council adoption)
- The expected magnitude of impact on the development of needed housing[9]
- The timeframe over which the action is expected to impact needed housing

Additional details about actions and their anticipated impacts are also summarized in the narrative that follows, with more information available in Appendix 4. Consistent with administrative rules providing direction to cities, Metro has sequenced actions to prioritize those that maximize benefits and minimize burdens, particularly for low-income communities. Prioritizing low-income communities will have co-benefits for communities of color, individuals with disabilities, and tribal communities, which are also specifically mentioned in the administrative rules directing city Housing Production Strategies. Many strategies also reflect a "targeted universalism" approach of removing barriers that disproportionately affect marginalized communities to improve access and outcomes for everyone.

These new strategies build on Metro's existing portfolio of housing-related work. Those existing actions are described in Appendix 5 and include actions such sharing of best practice, 2040 Planning and Development Grants, which fund local housing planning, the regional Affordable Housing Bond, and Supportive Housing Services funding.

[9] Numeric estimates are not provided because Metro's influence on housing production is indirect and because Metro's RHCS is not intended to respond to a numeric housing target as local jurisdictions' Housing Production Strategies are expected to do under the OHNA program.

Table 1: New actions to be taken by Metro

	ID	Action	Adoption or completion year	Implementation year	Impact on development of needed housing	Impact on housing affordability or choice	Timeframe for impact
Accelerate housing production	1	Housing pre-development and technical assistance	2026	2027	Low	Low	2030 onward
	2	Expand funding for the brownfield grant program	2026	2026	Medium	Medium	2028 onward
	3	Local HPS implementation funding and support	2026	2026	Medium	Low	2029 onward
	4	Regional pool of housing professionals for technical assistance and staffing support	2026	2026	Medium	Low	2027-2029
Research and assessment	5	Equitable access to regulated affordable housing	TBD	TBD	Low to none	Low to Medium	TBD
	6	Community co-design	2027	2027	Low to none	Low to Medium	TBD
	7	Innovative approaches	2026	2026	Medium	Medium	TBD
	8	Middle housing assessment	2027	2027	Low	Low	2029 onward
Convene and coordinate	9	Affordable housing operational stabilization strategy	2029	2026-2028	Medium	Medium to High	2026 onward
	10	Improvements to voucher and other rental assistance policies and implementation	2027	2027-2029	Low	Medium	TBD
New tools	11	Regional affordable housing inventory and listing service	2027	2027-2028	Low	Medium	2027-2028
	12	Regional land bank plan	2026	2027-2028	Low	Low	2029 onward

	ID	Action	Adoption or completion year	Implementation year	Impact on development of needed housing	Impact on housing affordability or choice	Timeframe for impact
	13	Permitting dashboard	2028	2028	Low	Low	Indirect effect
Policy	14	Urban Growth Management Functional Plan housing audit	2029	2027	Low	Low	5 years or longer
Funding and cross-sector collaboration	15	Coordinated legislative agenda	2027	2026	Medium to High	Medium	2029 onward
	16	Affordable housing funding feasibility	As determined by Council	As determined by Council	High	High	TBD

Summary of new actions to be taken by Metro

Oregon Administrative Rule 660-008-0200 describes the structure for city Housing Production Strategies. Though these rules do not apply to this RHCS, Metro has referenced them in the following summaries of actions included in the RHCS. In some cases, the information described in the administrative rules does not apply and is so noted.

Action #1: Housing pre-development and technical assistance

Description:	Create a new housing **pre-development and technical assistance** grant program for site specific housing development. May include site surveys, feasibility studies, design, permitting, etc.		
Additional information:	This action provides funding for pre-development activities necessary to unlock public properties and other properties where an owner is interested in developing affordable housing. This type of technical assistance can offset costs for land use studies and other pre-development activities including site surveys, feasibility studies, area plans and other activities that prepare sites for development. Prioritizes the production of multi-unit and middle housing units affordable at 120 percent AMI or below. In addition, this action can provide grants to local jurisdictions to support staff activities that accelerate permit reviews. Funding will come from the existing 2040 Planning and Development grant program. These grants will be broadly available for middle and multi-family housing types at a variety of affordability levels to ensure that the applicant pool is not limited, but preference will be given to affordable rental or ownership housing projects and those near transit and other community assets like transit, grocery stores, parks, etc.		
Adoption or completion year:	Formal adoption not required. Funding criteria and other programmatic details will be established in 2026. Grant distribution to non-government entities may require administrative rule updates.	**Implementation year:**	2027 onward
Critical steps to implement the action:	2026: Identify any changes required for the Construction Excise Tax language in Section 7.04 of the Metro Code and the associated Administrative Rules. Propose any changes to the Metro Chief Operating Officer and/or Metro Council as appropriate. Identify eligibility for grant funds and technical assistance with a goal to make technical assistance available to non-profits and faith-based organizations who own land. Identify funding availability and priorities for high density housing and affordability levels at or below 120 percent AMI to ensure that grant eligibility is not unduly limited. Establish rules, criteria, and procedures for the new program and funding levels. 2027 onward: Open grant program, solicit participation and enter into grant agreements to distribute funds over a period of several years.		
Proposed assessment and tracking of results:	Track the number of grant applications received and the number of grants awarded from January 2026 through July 2030 (the grant program is expected to be ongoing until funds are exhausted). Track the number of sites receiving assistance, the number, type, characteristics and	**Timeframe for expected impact on addressing housing need:**	2030 onward

	affordability of housing planned and ultimately built. Track site locations.		
Expected magnitude of impact:	**Production:** Low **Affordability/Choice**: Low	**Needed housing types expected to be produced:**	Addresses regional need for higher density apartments and middle housing.
Fair housing issues the action will mitigate or resolve:	**Direct effects:** Addresses issues associated with historically underserved or marginalized communities and protected classes. **Impacts based on program design:** Supports access to affordable rental housing; Supports access to affordable homeownership; Supports access to community assets and mitigation of exposure to harms; Supports housing stability, anti-displacement and displacement mitigation; Supports access to permanent housing to resolve homelessness.	**Needed housing characteristics to produce, including at a minimum tenure and affordability:**	Will produce rental and ownership opportunities affordable at 120 percent AMI or below.
Needed housing locations to address:	Available to every location in the Metro region with preference for affordable rental or ownership housing projects and locations near transit and other community assets like grocery stores, community centers, schools, parks, etc.		
Responsive to feedback theme:	Responsive to direct request for funding for site readiness that supports affordable housing production from several sources - the Housing Oregon survey, Implementers Work Group, and recent Metro Housing Department engagement.		
Populations that will benefit or be burdened by the action[10]:	This action will benefit households that need affordable housing. No burdens are anticipated.	**Complementary actions:**	• Regional available pool of housing professionals for technical assistance • Regional land bank plan

[10] Oregon Administrative Rules direct city Housing Production Strategies to include at least low-income communities, communities of color, individuals with disabilities, Tribal communities.

Action #2: Expand funding for the brownfield grant program

Description:	Expand **resources available for brownfield assessment** and explore grant opportunities for small scale remediation that leads to middle housing and multi-family housing development**.**		
Additional information:	This action would work to expand an existing Metro program currently providing Brownfields assessment grants in regionally identified transit corridors. New funding could expand the funding available for Phase I and Phase II environmental assessment and site reuse planning for housing production of multifamily and middle housing. Staff will explore funding sources to expand the program to include site cleanup. Funding is intended to be broadly available for a variety of housing types and affordability levels to ensure that the applicant pool is not limited.		
Adoption or completion year:	Formal adoption not required. A program exists for brownfields assessment, but expansion to include cleanup will depend on available funding. Could begin offering grants for assessment in 2026.	**Implementation year:**	2026 onward
Critical steps to implement the action:	2026: Determine whether amendments to Metro code are necessary to use grants as intended. Make Construction Excise Tax (CET) grant funding for Phase I and Phase II environmental assessment and site reuse planning available for housing production. Establish funding criteria to focus on higher density housing types. Preference for the production of affordable housing. Formalize reporting requirements in new grant agreements. Open grant program, solicit participation and enter into grant agreements to distribute funds. 2027 onward: Explore rule changes in the CET to allow the use of funding for small scale site cleanup activities, including oil tank removal, small scale soil removal, groundwater monitoring, installation of vapor barriers, and hazardous waste disposal, etc.		
Proposed assessment and tracking of results:	Track the number of brownfield grants Metro awards each year, the number of sites cleaned up, total acres remediated, and the number, type, affordability, and other characteristics of homes built on former brownfields.	**Timeframe for expected impact on addressing housing need:**	2028 onward
Expected magnitude of impact:	**Production:** Medium **Affordability/Choice:** Medium	**Needed housing types expected to be produced:**	Program would prioritize multi-unit and middle housing. It will also prioritize affordable rental and owner-occupied housing.

Fair housing issues the action will mitigate or resolve:	**Direct effects:** Program will prioritize cleanup in regionally identified centers, corridors, main streets, and station communities to increase housing options in high opportunity areas. **Secondary effects:** Supports access to community assets and mitigation of exposure to harms. **Impacts based on program design:** Supports access to affordable rental housing; Supports access to affordable homeownership; Addresses and disrupts patterns of segregation, and their correlation with concentrated areas of affluence and poverty.	**Needed housing characteristics to produce, including at a minimum tenure and affordability:**	Program will support housing of all types to increase overall regional production.
Needed housing locations to address:	Program will prioritize high-opportunity locations such as centers, corridors, main streets, and station communities.		
Responsive to feedback theme:	Feedback from Metro Council and MTAC requested the expansion of the existing brownfield grant program to produce additional needed housing.		
Populations that will benefit or be burdened by the action:	No burdens are anticipated. Based on the locational priorities and housing characteristics of the program, renters and transit riders, who are more often people with low incomes, communities of color, people with disabilities and tribal communities are most likely to benefit.	**Complementary actions:**	• Housing pre-development and technical assistance

Action #3: Local Housing Production Strategy (HPS) implementation funding and support

Description:	Funding and support for **local Housing Production Strategy implementation.**		
Additional information	The purpose of this action is to support the efforts of cities and counties to meet their housing production targets. This action provides grants to jurisdictions with approved Housing Production Strategies to help implement actions that are consistent with allowable uses for CET funds. Funding for Housing Production Strategies themselves is currently available through Metro' 2040 Planning and Development grant program.		
Adoption or completion year:	Formal adoption not required. Grants can be prioritized and funded through Metro's existing 2040 Planning and Development program and will be available in 2026.	**Implementation year:**	2026 onward
Critical steps to implement the action:	2026: Ensure that Metro grant programs can support the type of work cities and counties need to implement the actions in their Housing Production Strategies that have been approved by DLCD. Create criteria that require work to result in increased housing that meets specific housing mixes identified by the jurisdiction. Prioritize unit production at 120 percent AMI or below since public intervention is more necessary in that price range. Promote the availability of funds with the local jurisdictions. Create tracking requirements for cities to collect information about the number of units enabled or produced from the grant funding, including their affordability levels, type and geographic distribution.		
Proposed assessment and tracking of results:	Track the number of HPS implementation grant applications received, the number of grants awarded and completed from January 2026 through July 2030. Track the number of units enabled or produced from the grant funding, including their affordability levels, type and geographic distribution.	**Timeframe for expected impact on addressing housing need:**	2029 onward
Expected magnitude of impact:	**Production**: Medium **Affordability/Choice:** Low	**Needed housing types expected to be produced:**	All housing types
Fair housing issues the action will mitigate or resolve:	Local jurisdictions are responsible for addressing fair housing issues identified in their Housing Production Strategies and this funding will support their efforts. Because this action is intended to support implementation of city strategies that have been approved by DLCD,	**Needed housing characteristics to produce, including at a minimum tenure and affordability:**	This program would support the production of housing tenures and affordability levels prioritized by local jurisdictions in their production strategies

	grant eligibility criteria will not be overly prescriptive regarding housing types, locations, affordability, or other characteristics.		with a focus on 120 percent of AMI or below.
Needed housing locations to address:	Available to any location in the Metro region in jurisdictions that have had an HPS approved by DLCD.		
Responsive to feedback theme:	Responsive to direct request for regional funding to support local HPS implementation via the Implementers Work Group.		
Populations that will benefit or be burdened by the action:	This action will support the implementation of local HPSs, which respond to identified housing needs and which have been approved by the state. Funding this local work functions as regional coordination. The benefits and burdens of local HPS actions supported through this grant were determined in the approved local HPs.	**Complementary actions:**	• Regionally available pool of housing professionals for technical assistance and staffing support

Action #4: Regional pool of housing professionals for technical assistance and staffing support

Description:	Consider developing a **regional pool of housing professionals for technical assistance and staffing support** to smaller jurisdictions to support planning and implementation related to housing production, affordability and choice.		
Additional information:	This action explores how Metro can provide technical assistance to cities who need housing consultation and technical assistance, particularly to support their production of affordable housing. In addition, this action explores ways to fund staffing at jurisdictions to support current and long-range planning activities and housing production. The focus will be on the individual needs of the jurisdiction who request support, particularly needs that are articulated in an approved Housing Production Strategy.		
Adoption or completion year:	Formal adoption is not required. Changes will be implemented in 2026.	**Implementation year:**	2026 onward
Critical steps to implement the action:	2026: Update administrative rules to include eligible activities. Seek Metro COO approval for any Construction Excise Tax Administrative Rule updates. Establish funding levels and rules, criteria and procedures for the new program including tracking requirements for number of units, affordability and geographic distribution that results from the support. Create new criteria that prioritize the production of multifamily and middle housing and affordable housing. Create eligibility requirements that prioritize support for cities without necessary staffing to achieve their goals. Consider 25,000 in population or less (as measured in the last U.S. Census) or fewer than five staff members in their planning department. Clearly articulate how funds can be used to ensure that they provide specific technical expertise that results in housing production or for staffing assistance that enables jurisdictions to process more permits for housing. Solicit consultants for on-call list. Develop new agreement templates that require detailed tracking of results. 2027: Open program and award grants in regular cycles for several years.		
Proposed assessment and tracking of results:	Track the number of requests for access to on-call services, the length of service and feedback from jurisdictions on the effectiveness of the service. Require jurisdictions to report on housing units enabled (e.g., through zoning changes, streamlined permitting, or incentives) because of consultant support. Also require tracking of affordability levels, geographic distribution of units and benefits and burdens in the local community.	**Timeframe for expected impact on addressing housing need:**	2027-2029

Expected magnitude of impact:	**Production**: Medium **Affordability/Choice**: Low	**Needed housing types expected to be produced:**	Priority will be given to the particular needs of the cities who request support. It is anticipated that technical assistance will be more commonly needed for multi-unit (rentals and condos) because of its complexity and middle housing because builders have less familiarity.
Fair housing issues the action will mitigate or resolve:	**Direct effects**: Supports access to affordable rental housing. **Secondary effects**: Prioritizing multi-unit housing supports accessible and adaptable housing; Addresses issues associated with historically underserved or marginalized communities and protected classes by prioritizing affordable housing. **Impacts based on program design**: Supports access to affordable homeownership.	**Needed housing characteristics to produce, including at a minimum tenure and affordability:**	Priority will be given to the particular needs of the cities who request support.
Needed housing locations to address:	Locations will be region wide		
Responsive to feedback theme:	Direct request from local jurisdictions via the Implementers Work Group (especially to support smaller jurisdictions).		
Populations that will benefit or be burdened by the action:	This action will provide financial assistance to support the implementation of local HPSs, which respond to identified housing needs and which have been approved by the state. Funding this local work functions as regional coordination. Benefits and burdens of those actions are determined and managed by local jurisdictions.	**Complementary actions:**	• Local Housing Production Strategy implementation support and funding. • Housing pre-development and technical assistance

	Metro will track results for process improvements that reduce burdens.		

Action #5: Equitable access to regulated affordable housing

Description:	Evaluate lessons learned and effective practices from implementation of the 2018 Affordable Housing Bond; research models and best practices and develop and share recommendations with state and local funders to **strengthen fair housing and equitable access to affordable housing**. Incorporate recommendations into the implementation of any future Metro affordable housing funding implementation.		
Adoption or completion year:	No formal adoption or Council action is needed to share recommendations with state and local affordable housing funders, which is anticipated to occur no later than 2027. Timing of any Metro action to adopt recommendations into future Metro funding is subject to future Metro Council direction.	**Implementation year:**	Implementation is dependent on availability of new Metro funding and decisions by other funders to incorporate new funding requirements based on findings and recommendations.
Critical steps to implement the action:	Review and evaluate affirmative marketing, tenant screening, and geographic distribution and siting policies and practices of 2018 Metro Housing Bond. • Pre-scoping and consultant selection • Work plan refinement, including engagement Housing Bond Oversight Committee and jurisdictional partners to refine scope and approach • Review and categorize affirmative marketing and tenant selection policies and tools in affordable rental and homeownership projects funded by 2018 Metro Housing Bond; research alternative models • Evaluate impacts of marketing and tenant selection policies and practices based on post-occupancy reporting on application denials, accommodations, and tenant demographics, as well as through focused engagement with housing operators and developers Review Affirmatively Furthering Fair Housing (AFFH) outcomes related to geographic distribution of regulated affordable housing; develop AFFH geographic recommendations for future funding. • Identify and develop strategies to affirmatively further fair housing, addressing disparities in housing needs, promoting access to opportunity, and addressing patterns of segregation Develop recommendations and supportive tools, strategies and resources to strengthen approaches, potentially including but not limited to new reporting tools/templates and reporting requirements and AFFH geographic/location framework for future Metro funding. • Ensure that any proposed new funding requirements are informed by analysis of equitable benefits and costs/tradeoffs; make efforts to streamline and reduce unnecessary administrative burden		

Proposed assessment and tracking of results:	TBD – Dependent on findings of evaluation, recommendations.	**Timeframe for expected impact on addressing housing need:**	TBD – dependent on availability of new Metro funding and decisions by other funders to incorporate new funding requirements based on findings.
Expected magnitude of impact:	**Production: Low to none** Unlikely to result in new production. **Affordability/Choice: Low to Medium** Improvements to equity of access to regulated affordable housing, enhancing housing choice. Magnitude of impact depends on local adoption of recommendations and/or Metro Council referral and voter passage of new funding measure, which would provide opportunities to incorporate findings into implementation of future Metro investments.	**Needed housing types expected to be produced:**	Does not result in new production.
Fair housing issues the action will mitigate or resolve:	Potential to strengthen equity of access to regulated affordable housing through improvements to affirmative marketing and tenant selection practices. **Direct effects**: Supports access to affordable rental housing; Addresses issues associated with historically underserved or marginalized communities and protected classes; Addresses and disrupts patterns of segregation, and their correlation with concentrated areas of affluence and poverty; Supports access to community assets and mitigation of exposure to harms. **Impacts based on program design**: Supports access to affordable homeownership.	**Needed housing characteristics to produce, including at a minimum tenure and affordability:**	Does not result in new production.
Needed housing locations to address:	Affirmative marketing and tenant selection practices are relevant for all affordable housing, regardless of location. AFFH locational framework is critical to support geographic distribution and siting of future affordable housing investments in locations that expand access to opportunities and amenities.		

Responsive to feedback theme:	Responsive to feedback from fair housing consultant and previous feedback from the Metro Affordable Housing Bond Oversight Committee.		
Populations that will benefit or be burdened by the action:	Dependent on adoption of recommendations and/or new funding, this work has strong potential to benefit underserved communities, including low-income communities, communities of color, individuals with disabilities, Tribal communities, immigrants and refugees, those with criminal justice system involvement and/or poor credit or eviction histories.	**Complementary actions:**	• Affordable housing funding feasibility • Affordable housing operational stabilization strategy • Improvements to voucher and other rental assistance policies and implementation

Action #6: Community co-design

Description:	Building upon lessons learned and best practices from the 2018 Metro Affordable Housing Bond and Metro's Transit Oriented Development (TOD) grant program, evaluate and advance opportunities to **strengthen requirements and incentives for community participation and co-design in the development and operations of Metro funded affordable housing**, to support the creation of housing that is designed and operated to be culturally responsive to the needs of historically marginalized populations. Identify opportunities for Metro to support capacity building for community based and culturally specific organizations to participate in affordable housing development and operations through future housing funding allocation and/or program requirements or criteria that incentivize partnerships that benefit community based and culturally specific organizations.		
Adoption or completion year:	No formal adoption or Council action is needed to share recommendations with state and local affordable housing funders, as well as Metro TOD program review, is anticipated to occur no later than 2027. Timing of any Metro action to adopt recommendations into future Metro funding is subject to future Metro Council direction.	**Implementation year:**	Initial findings no later than 2027
Critical steps to implement the action:	Engage Housing Bond Oversight Committee and jurisdictional partners to refine scope and approach. Select consultant and develop work plan and engagement plan; ensure considerations to minimize burdens related to information gathering on jurisdictional and nonprofit partners. Evaluate best practices in community co-design • Review current and emerging practices and assess outcomes of community co-design in affordable housing development projects • Engage developers, community based and culturally specific organizations to understand barriers and opportunities to strengthen outcomes related to tenant stability and satisfaction • Develop an assessment or survey to gather information about tenant stability and satisfaction related to culturally responsive design and services in a subset of properties with culturally specific design and services • Identify and document effective practices, and evaluate needs and barriers to scaling them up Develop recommendations and advance strategies to support their implementation by Metro or partners • Develop and share findings and recommendations with Housing Oregon, OHCS and local jurisdictional partners to inform local funding priorities and criteria		

	• Identify and implement changes to Metro funding requirements to strengthen community co-design outcomes for Metro funded affordable housing projects, including TOD funding and any future funding for affordable housing • Identify and implement changes to TOD program criteria as needed to strengthen community co-design • Identify, design and implement criteria or requirements through new Metro funding measure, contingent on Council direction and measure passage • Ensure that any proposed new funding requirements are informed by analysis of equitable benefits and costs; make efforts to streamline and reduce unnecessary administrative burden		
Proposed assessment and tracking of results:	Rates of involvement from community-based and culturally specific organizations, particularly service organizations, in the development and ownership/operations of future Metro-funded homes. Ongoing tenant stability outcomes Tenant satisfaction data, as feasible to collect.	**Timeframe for expected impact on addressing housing need:**	TBD – Dependent on timing of availability of funding.
Expected magnitude of impact:	**Production: Low to None** Unlikely to directly increase production **Affordability/Choice: Low to Medium** Potential improvement of quality and operational stability of housing through increased participation of community-based and culturally specific organizations in housing development process, resulting in more responsive and equitable planning and design. Magnitude of impact depends on funder adoption of recommendations and/or Metro passage of new funding measure, which would provide opportunities to incorporate findings into the implementation of new affordable housing funding.	**Needed housing types expected to be produced:**	N/A

Fair housing issues the action will mitigate or resolve:	Potential improvements in resident choice and satisfaction, service and tenancy outcomes. **Direct effects:** Addresses issues associated with historically underserved or marginalized communities and protected classes.	**Needed housing characteristics to produce, including at a minimum tenure and affordability:**	N/A
Needed housing locations to address:	All		
Responsive to feedback theme:	Responsive to feedback received from focus groups with coalitions engaged in affordable housing advocacy and service providers and organizations working with urban Native community members, as well as previous feedback from the Affordable Housing Bond Oversight Committee. Approach reflects feedback from jurisdictional partners that Metro should include consideration of administrative burden and cost/tradeoffs associated with implementation.		
Populations that will benefit or be burdened by the action:	Dependent on adoption of recommendations and/or new funding, this work has strong potential to benefit low-income communities, communities of color, individuals with disabilities, Tribal communities, immigrants and refugees, households exiting homelessness.	**Complementary actions:**	• Affordable housing funding feasibility • Affordable housing operational stabilization strategy • Equitable access to regulated affordable housing

Action #7: Innovative approaches

Description:	Research, evaluate and identify opportunities to advance **innovative and non-LIHTC approaches to housing** development/construction, financing, and ownership that present **opportunities to reduce costs, diversify housing types, and strengthen outcomes** for groups most impacted by housing instability. This research is intended to build upon previous Metro research and engagement in 2024 to evaluate affordable housing investment opportunities. The 2024 study scope included consideration of rental housing development gap funding, acquisition/conversion, preservation, and complementary investments such as land acquisition/banking, predevelopment funding, and operating support and risk mitigation, as summarized in Metro's report, Evaluation of Affordable Housing Investment Opportunities. Based on feedback collected through the 2024 engagement process as well as 2025 engagement related to the RHCS, Metro has identified additional areas of research/engagement related to future affordable housing funding opportunities. This action seeks to fill gaps in previously conducted research by exploring and evaluating areas of innovation not previously explored, including: • Modular and manufactured housing and cross-laminated timber and smaller or expandable designs • **Social housing and alternative ownership** models, including CLT and resident-owned multi-family housing models • Innovative financing approaches to support development and operations of **smaller scale (<20 unit) building types**, including PSH Assess barriers and identify opportunities to pilot or scale up innovative approaches; approach would include engagement with public, private, and philanthropic partners to support coordinated research, development and investment strategies.		
Adoption or completion year:	Initial findings by 2026.	**Implementation year:**	Identify 1-2 pilot opportunities by 2027.
Critical steps to implement the action:	• Preliminary research and engagement to refine scope and focus, including identifying areas where Metro can add value and not duplicate existing efforts • Consultant selection and work plan development • Work plan development, including engagement plan and racial equity framework • Targeted research, expert engagement, barriers and opportunities evaluation • Develop prioritized recommendations, including considering tradeoffs and broader opportunity analysis of future investment priorities		

	• Identify or secure funding to pilot or scale up innovative approaches, as prioritized or recommended through research, engagement, and evaluation alongside other previously researched investment opportunity areas • Create implementation plan or next steps to advance recommendations		
Proposed assessment and tracking of results:	Units produced through Metro investments in innovative/pilot strategies. Regulated affordability level (average AMI level or % below market rate), PSH set aside, and unit size compared to LIHTC funded affordable housing. Average cost per unit compared to LIHTC funded affordable housing. Time from concept to occupancy. Resident stability and satisfaction, if feasible to collect.	**Timeframe for expected impact on addressing housing need:**	Unknown
Expected magnitude of impact:	**Production: Medium** Potential expansion of housing production through efforts to scale successful approaches that lower costs, increase speed, improve financial efficiencies, or improve resident outcomes. **Affordability/Choice: Medium** Potential to address gaps in availability and access, especially for high-demand alternative ownership models.	**Needed housing types expected to be produced:**	All types
Fair housing issues the action will mitigate or resolve:	Potential expansion of alternative ownership models that could improve outcomes for resident stability, governance, and wealth creation. Potential reduction in cost or diversification of rental housing production models to expand unit	**Needed housing characteristics to produce, including at a minimum tenure and affordability:**	All – especially affordable rental and alternative ownership models.

	production or ability to fill gaps in housing options and thereby expand housing choice. **Direct effects**: Supports access to affordable rental housing; Supports access to affordable homeownership.		
Needed housing locations to address:	All		
Responsive to feedback theme:	Responsive to focus group with development and financing professionals and cited through local Housing Production Strategies' engagement. These concepts arose in previous Metro Housing Department engagement and were supported by Metro Councilors in their May work session.		
Populations that will benefit or be burdened by the action:	Benefit: • Low-income communities • Communities of color • People experiencing or at risk of homelessness	**Complementary actions:**	• Affordable housing funding feasibility • Affordable housing operational stabilization strategy • Regional land bank plan • Equitable access to regulated affordable housing • Community co-design

Action #8: Middle housing assessment

Description:	Conduct an **assessment of middle housing** in the region to identify best practices and common barriers.		
Additional information:	The purpose of this program is to understand how Metro can expand the development of middle housing in more cities around the region. Currently middle housing is occurring in Portland, particularly SE and NE Portland. An assessment of best practices and common barriers will consider actions needed at the local or regional level, including a promising practices guidebook on middle housing useful for local governments or other resources to use in support of goal 10 planning. The study of middle housing will also seek to understand affordability of these housing types in the region.		
Adoption or completion year:	No formal adoption necessary. Assessment will be completed in 2027.	**Implementation year:**	2027 onward
Critical steps to implement the action:	2026: Develop proposed work program, ensure adequate staff and financial resources to conduct study, conduct study, finalize study, seek Council direction on next steps. 2027 onward: Implementation with approach dependent on results of study and Council direction.		
Proposed assessment and tracking of results:	Urban growth reports will continue to report on housing production by housing type, including middle housing. Metrics to track the results of this action will be proposed through the course of the assessment and are dependent on what the study shows but could include metrics that track local adoption of best practices.	**Timeframe for expected impact on addressing housing need:**	2029 onward
Expected magnitude of impact:	**Production**: Depends on actions taken in response to the assessment; the impacts of developing the assessment itself are low. **Affordability/Choice:** Low	**Needed housing types expected to be produced:**	Middle housing
Fair housing issues the action will mitigate or resolve:	To be determined in study; focus would be on broadening housing variety throughout the region, creating relatively more affordable housing choices where few currently exist. **Secondary effects**: Supports accessible and adaptable housing; Addresses issues associated	**Needed housing characteristics to produce, including at a minimum tenure and affordability:**	The focus is home ownership opportunities for households earning 60 to 120 percent AMI.

	with historically underserved or marginalized communities and protected classes; Supports housing stability, anti-displacement and displacement mitigation. **Impacts based on program design:** Supports access to affordable rental housing; Supports access to affordable homeownership; Supports access to community assets and mitigation of exposure to harms; Addresses and disrupts patterns of segregation, and their correlation with concentrated areas of affluence and poverty; Supports access to permanent housing to resolve homelessness.		
Needed housing locations to address:	Neighborhoods with varied market conditions throughout the region.		
Responsive to feedback theme:	Idea generated from the Home Building Association Government Affairs meeting and responsive to priorities around disrupting segregation, encouraging middle housing production, and encouraging additional homeownership opportunities.		
Populations that will benefit or be burdened by the action:	Households earning less than 120 percent AMI.	**Complementary actions:**	• Innovative approaches (Evaluate alternative affordable housing models)

Action #9: Affordable housing operational stabilization strategy

Description:	Develop or support the development of a coordinated **affordable housing operational stabilization strategy** to respond to industry-wide challenges due to rising operational costs, increased resident needs, and lack of coordination/alignment with homeless and supportive services. This strategy will result in a coordinated set of concrete actions for Metro and state/local partners to take to address operational stabilization needs, potentially including but not limited to: adjustments or flexibility to established regulatory agreements, changes to policies such as rental assistance payment standards, coordinated actions to address vacancies and streamlined referrals, and coordination to secure new funding for operational stabilization.		
Adoption or completion year:	Strategy will be developed in 2026.	**Implementation year:**	2026-2028
Critical steps to implement the action:	• Research and partner engagement to inform project scoping, high level resource planning • Consultant selection *(if applicable - TBD)* • Work planning and project alignment • Review of existing efforts (engagement, financial analysis, policy and advocacy efforts, involved parties), compilation of findings and assessment of additional engagement and analysis needed • Supplemental engagement, research, analysis • Development of priority strategies; evaluation of feasibility and impact, implementation considerations; proposed assessment and results tracking • Prioritized implementation of identified strategies		
Proposed assessment and tracking of results:	TBD – Dependent on identified strategies Likely to include metrics of affordable housing property and/or organizational stability, including but not limited to: • Impact on Debt Coverage Ratio (DCR) • Vacancy rates / loss • Arrearages / rent collection rates • Units preserved or stabilized, by affordability level	**Timeframe for expected impact on addressing housing need:**	Strategy will result in at least 1-2 Metro led actions that can be implemented in 2026-2027 to have an immediate impact on stabilization needs.
Expected magnitude of impact:	**Production: Medium** Could prevent foreclosure and reduce risk of losing affordable housing stock, reduce project	**Needed housing types expected to be produced:**	Stabilization of existing affordable (0-60 percent AMI) units and PSH, which impacts ability of organizations to

	costs and expedite projects by reducing the need for debt financing. **Affordability/Choice: Medium to High** Could improve access to deeply affordable and PSH units through reducing some of the risk associated with underwriting these types of projects; increase diversity of housing offerings through stabilizing smaller community-based and culturally specific developers/operators, allowing them to maintain financial stability necessary to pursue new developments; improve resident outcomes.		continue investing in development of new affordable housing.
Fair housing issues the action will mitigate or resolve:	The operational instability of specific properties serves as a deterrent for operators to implement lower-barrier screening criteria for households exiting long-term homelessness or with other significant barriers to stability to move into and remain in their properties. Addressing risks improves conditions for adopting more supportive tenant selection practices, enhancing equity in access and stability. **Direct effects**: Supports access to affordable rental housing; Supports housing stability, anti-displacement and displacement mitigation; Supports access to permanent housing to resolve homelessness.	**Needed housing characteristics to produce, including at a minimum tenure and affordability:**	Regulated affordable rental housing properties that include deeply affordable and PSH units.
Needed housing locations to address:	Locations of existing regulated affordable housing properties, which are geographically distributed across the region.		
Responsive to feedback theme:	The need for strategies to address operational challenges to stabilize properties, residents, and operators a recurrent theme during recent Metro Housing engagement related to housing production, as well as recent RHCS focused engagement with Housing Oregon membership. There are a number of potential actions Metro and/or partners could take to address these challenges. These actions will benefit from a comprehensive and coordinated approach to support cross-jurisdictional coordination and alignment, given the need to prioritize		

	limited resources to address significant and urgent needs that have an immediate impact on the stability of affordable housing organizations and residents.		
Populations that will benefit or be burdened by the action:	This strategy development is intended to disproportionately support those with no or very low income, communities of color, individuals with disabilities, older adults, people exiting homelessness, people with criminal justice involvement, poor credit and/or rental histories, or other screening barriers.	**Complementary actions:**	• Housing pre-development and technical assistance • Affordable housing funding feasibility • Equitable access to regulated affordable housing • Regional affordable housing inventory and listing service • Improvements to voucher and other rental assistance policies and implementation • Coordinated legislative agenda

Action #10: Improvements to voucher and other rental assistance policies and implementation

Description:	**Evaluate and improve voucher and other rental assistance policies and implementation** to address portability challenges, shifting market conditions impacting affordable housing, and to connect available vouchers with vacant regulated affordable housing units.		
Adoption or completion year:	Assessment to be completed by 2027. Adoption of new policies and practices is subject to existing governance structures for federal Housing Choice Vouchers (HCV), SHS-funded RLRA vouchers, and other resources.	**Implementation year:**	2027-2029
Critical steps to implement the action:	• Engage county partners and housing authorities to inform scope development • Consultant contract (if applicable) • Evaluate voucher and other rental assistance policies and implementation • Engage partners in developing and implementing barrier mitigation actions; identify cross-county transfer coordination needs and resources • Create additional policies, partnerships, and workflows as needed, to support portability and streamlined placement of households with vouchers into existing regulated affordable units; apply racial equity lens • Develop an implementation strategy to support partners in adopting policy and workflow changes, potentially including development of Metro-led trainings and technical assistance tools and resources, to support implementation and responsiveness to shifting needs and conditions • Develop a framework for ongoing monitoring and evaluation of outcomes		
Proposed assessment and tracking of results:	This is subject to existing governance structures for funding/programs. Metro will convene coordination conversations and seek to build consensus around shared metrics, which could include: • Number of requests vs. successful cross-county transfers or coordinated entry referrals • Reasons for denial where applicable • Regulated housing operator placement requests for tenant-based vouchers vs. successful placements	**Timeframe for expected impact on addressing housing need:**	TBD – Dependent on decision-making through existing governance structures for RLRA, Housing Choice Vouchers (HCV) and other rental assistance; potential for phased improvements over time.

Expected magnitude of impact:	**Production: Low** Streamlined connection between voucher-served households and existing units could support enhanced operational stability for some housing providers, creating more opportunities for expansion of deeply affordable units and PSH. **Affordability/Choice: Medium** Improvements to portability are likely to improve choice for households wishing to relocate across county lines (between Clackamas, Multnomah, and Washington counties); potential improvements to affordability through operational stabilization for distressed properties achieved through voucher and available unit matching.	**Needed housing types expected to be produced:**	N/A
Fair housing issues the action will mitigate or resolve:	This action supports housing choice for voucher-holders. **Direct effects**: Supports access to affordable rental housing; Supports access to community assets and mitigation of exposure to harms; Supports housing stability, anti-displacement and displacement mitigation; Supports access to permanent housing to resolve homelessness **Secondary effects**: Addresses and disrupts patterns of segregation, and their correlation with concentrated areas of affluence and poverty.	**Needed housing characteristics to produce, including at a minimum tenure and affordability:**	N/A
Needed housing locations to address:	All		
Responsive to feedback theme:	Responsive to feedback from Metro jurisdictional partners for SHS, Housing Oregon member organization, and Metro Councilors as well as previous feedback from Metro advisory and oversight committee members.		

Populations that will benefit or be burdened by the action:	Benefit- Households exiting homelessness, people living with low-income, communities of color, individuals with disabilities, older adults.	**Complementary actions:**	• Affordable housing funding feasibility • Regional affordable housing inventory and listing service • Affordable housing operational stabilization strategy

Action #11: Regional affordable housing inventory and listing service

Description:	Develop a centralized **regional affordable housing inventory and listing service** to support housing navigators and seekers in connecting with information about available affordable housing units that meet their needs across the region.		
Adoption or completion year:	Regulated housing inventory build-out and listing service plan by 2027.	**Implementation year:**	Listing 2027-2028, contingent on securing funding.
Critical steps to implement the action:	Data framework and regional affordable housing inventory (RAHI) development (2026) • Engage state and local funding/jurisdictional partners to develop data framework and scope • Jurisdictional coordination to develop consolidated and consistent inventory data • Plan for engaging owners/operators to review and update data gaps • Coordination with Metro data research center to support integration of RAHI data into RLIS (Metro public GIS data) Regional affordable housing listing service plan (2027) • Best practice and market scan of inventory and listing platforms, market scan • Evaluation of internal capacity and ongoing maintenance needs • Engage jurisdictional partners, housing operators, property managers and end users (e.g., housing navigators and housing seekers) to understand functionality needs • Develop procurement and funding strategy Listing service design, build-out and implementation (2027-2028)		
Proposed assessment and tracking of results:	Site analytics, including active user base, will demonstrate impact and use of website.	**Timeframe for expected impact on addressing housing need:**	Metro's goal is to launch a listing service by 2027-2028, which is when the platform would begin to impact housing choice.
Expected magnitude of impact:	**Production: Low** Unlikely to have direct impact on production. **Affordability/Choice: Medium** Aims to create greater opportunities for those interested in finding affordable housing to easily access the various buildings and units in the region with an interactive map and links to	**Needed housing types expected to be produced:**	N/A

	building websites and waitlists. Could create efficiencies and improve opportunities for accessing housing with needed amenities or services, accessibility features and affordability levels.		
Fair housing issues the action will mitigate or resolve:	By providing information about the region's affordable housing units through a centralized platform, the website will help reduce barriers to housing choice and increase access to accessible housing. **Direct effects**: Supports accessible and adaptable housing; Supports access to affordable rental housing; Supports access to community assets and mitigation of exposure to harms; Addresses and disrupts patterns of segregation, and their correlation with concentrated areas of affluence and poverty; Supports access to permanent housing to resolve homelessness. **Secondary effects**: Addresses issues associated with historically underserved or marginalized communities and protected classes; Supports housing stability, anti-displacement and displacement mitigation. **Impacts based on program design**: Supports access to affordable homeownership.	**Needed housing characteristics to produce, including at a minimum tenure and affordability:**	N/A
Needed housing locations to address:	N/A		
Responsive to feedback theme:	Responsive to Portland's Housing Production Strategy, feedback received from Metro's Housing Bond Oversight Committee and the SHS Tri-County Planning Body, and from Metro Councilors		
Populations that will benefit or be	Benefits: • Low-income communities	**Complementary actions:**	• Affordable housing funding feasibility

burdened by the action:	• Communities of color • Individuals with disabilities • Tribal communities • Older adults • Households exiting homelessness		• Affordable housing operational stabilization strategy • Improvements to voucher and other rental assistance policies and implementation

Action #12: Regional land bank plan

Description:	Develop a plan for a **regional land bank** that outlines the necessary legal framework, governance structures, and operational guidelines to support cross-sector collaboration and investment. Define clear policy priorities, including considerations related to Affirmatively Furthering Fair Housing, market conditions and funding opportunities.		
Additional information:	This effort will study ways to expand land banking activities in the region. Short-term actions may involve growing or expanding land bank functions within Metro and longer-term actions will explore the creation of a land bank authority for the region. Funding sources for these efforts might include state, federal, and philanthropic partnerships. A revolving acquisition fund at Metro or a new entity is a concept to be explored.		
Adoption or completion year:	Formal adoption is not required to initiate work. Formal adoption may be required at a future date depending on the details of implementing a regional land bank. Proposed land bank plan will be completed in 2026.	**Implementation year:**	Expansion of an existing regional land bank could occur beginning in 2027, pending Metro Council direction and the identification of a funding source. Starting a new entity might begin as early as 2028.
Critical steps to implement the action:	2026: Develop proposed work program, ensure adequate staff and financial resources to conduct study, conduct study and engagement with local jurisdictions and other partners, share results. 2027: Seek Council direction on next steps and begin regional discussions to build partnerships. 2027 onward: pending Council direction, initiate steps to establish a regional land bank authority. Finalize details including details on housing types, locations, and characteristics that would be the focus of the land bank. For implementation to occur, critical steps will include identifying and securing funding for land acquisition, holding, and programmatic costs.		
Proposed assessment and tracking of results:	To be determined in study. Possible metrics could include numbers, types, affordability levels, and accessibility of homes built in land bank areas, acres held in the land bank, share of land in high-opportunity areas (or centers, corridors, main streets, and station communities) number of culturally-specific housing providers served.	**Timeframe for expected impact on addressing housing need:**	2029 onward
Expected magnitude of impact:	**Production:** Depends on implementation of plan; the impact of developing the plan itself is low.	**Needed housing types expected to be produced:**	Will prioritize middle housing and multi-unit housing.

	Affordability/Choice: Low		
Fair housing issues the action will mitigate or resolve:	To be determined in study; goal would be disrupting patterns of housing segregation by purchasing land in areas with concentrations of affluence and in high-opportunity areas with access to amenities and services. **Direct effects:** Supports access to affordable rental housing; Supports access to affordable homeownership; Addresses and disrupts patterns of segregation, and their correlation with concentrated areas of affluence and poverty. **Secondary effects**: Supports accessible and adaptable housing. **Impacts based on program design:** Supports access to community assets and mitigation of exposure to harms; Addresses issues associated with historically underserved or marginalized communities and protected classes; Supports housing stability, anti-displacement and displacement mitigation; Supports access to permanent housing to resolve homelessness.	**Needed housing characteristics to produce, including at a minimum tenure and affordability:**	Will prioritize the production of affordable housing at 120 AMI and below.
Needed housing locations to address:	To be determined in study; intent is to disrupt patterns of segregation and support anti-displacement policies.		
Responsive to feedback theme:	An early idea generated from a pre-scoping interview with Habitat for Humanity and Proud Ground and received broad support from the Implementers Work Group, MTAC, and several Metro Councilors as a strategy to disrupt segregation, support affordable homeownership, and address increases in land values.		
Populations that will benefit or be burdened by the action:	To be determined in the study.	**Complementary actions:**	• Affordable housing funding feasibility • Expand funding for brownfield grant program

			• Equitable access to regulated affordable housing • Regional affordable housing inventory and listing service • Community co-design • Innovative approaches

Action #13: Permitting dashboard

Description:	Explore how to create a **permitting dashboard** to track permitting times across the region.		
Additional information:	The purpose of this action is to consider the creation of a new online dashboard to track the length of permitting times around the Portland Metro area for the variety of housing types. There is no central location where all cities and counties in the Metro area share permitting information or a common software system used in every jurisdiction. This poses significant challenges to producing a dashboard. This exploration will endeavor to address these challenges and produce a public, online permitting dashboard that can be regularly updated.		
Adoption or completion year:	Formal adoption not necessary. Dashboard, pending availability of data and resources to maintain it, would be completed in 2028.	**Implementation year:**	2028 onward, pending availability of data and resources to maintain the dashboard.
Critical steps to implement the action:	2026: Develop proposed work program, including details about what data would be collected and reported, ensure adequate staff and financial resources to implement dashboard, collect data on an ongoing basis 2027: Make determination about whether adequate resources exist to publish and maintain web page. 2028 onward: publish and update web page on a periodic basis.		
Proposed assessment and tracking of results:	The action itself is an exercise in tracking results; metrics assessing the program itself could include web page usage statistics.	**Timeframe for expected impact on addressing housing need:**	Indirect impacts on housing mean that it is not possible to establish a timeframe.
Expected magnitude of impact:	**Production:** Low **Affordability/Choice:** Low	**Needed housing types expected to be produced:**	Would not produce housing, but would track permitting of all types.
Fair housing issues the action will mitigate or resolve:	Patterns of segregation – the dashboard would highlight locations where permits are not being filed or locations where permitting timelines are longer. The dashboard may also include information about housing accessibility.	**Needed housing characteristics to produce, including at a minimum tenure and affordability:**	Work program would identify housing characteristics that could be tracked.
Needed housing locations to address:	Dashboard would identify over-and-under-performing locations around the region.		
Responsive to feedback theme:	Concept generated from the focus group with the Home Building Association and some support from Metro Councilors and MPAC as a tool to track production trends across the region, identify barriers, and highlight successful jurisdictional progress.		

Populations that will benefit or be burdened by the action:	Not applicable; would track all permitting times for all housing	**Complementary actions:**	• Regional affordable housing inventory and listing service • Middle housing assessment

Action #14: Urban Growth Management Functional Plan housing audit

Description:	Begin a Metro **Urban Growth Management Functional Plan audit and cleanup** of housing-related titles to align with new State requirements and regional priorities as identified in the 2027 Future Vision.		
Adoption or completion year:	2029	**Implementation year:**	Code housekeeping began in 2025; follow up amendments to housing code will be adopted in 2029; cities and counties have two years from acknowledgement of Metro code amendments to update their own plans for compliance.
Critical steps to implement the action:	2025-2026: Develop package of housekeeping edits and provide for approval by MTAC, MPAC and Metro Council. 2026 -2027: Develop proposed work program informed by the new Future Division and updated Framework Plan. 2028: Conduct audit, share results of audit with advisory committees and Council. 2029: Seek Council direction on next steps, including any amendments.		
Proposed assessment and tracking of results:	Proposed metrics for the code audit could include: number of regulatory barriers identified/removed and feedback from local jurisdictions on impact to their housing production starting a year after adoption.	**Timeframe for expected impact on addressing housing need:**	Long term; five years or more
Expected magnitude of impact:	**Production:** Depends on actions taken in response to the assessment; the impacts of developing the assessment itself are low. **Affordability/Choice**: Low	**Needed housing types expected to be produced:**	All types, with a focus on middle housing and multi-unit housing.
Fair housing issues the action will mitigate or resolve:	Focus would be on broadening housing variety throughout the region, creating relatively more affordable housing choices where few currently exist. **Secondary effects**: Supports access to community assets and mitigation of exposure to harms.	**Needed housing characteristics to produce, including at a minimum tenure and affordability:**	Action focuses on the production of housing at all tenure and levels of affordability.

Needed housing locations to address:	Urban centers, corridors, main streets, station communities and neighborhoods.		
Responsive to feedback theme:	Generated through an internal staff meeting to respond to requests from the Implementers Work Group to examine internal processes for opportunities for clarity and simplification.		
Populations that will benefit or be burdened by the action:	No burdens are anticipated. If housing production increased within six years as a result. Location depends on local jurisdictional decisions.	**Complementary actions:**	• Middle housing assessment

Action #15: Coordinated legislative agenda

Description:	Convene jurisdictional partners to develop a **coordinated legislative agenda for state and federal housing/homelessness resources**, including a regional priority to identify funding for infrastructure. The agenda would be updated as needed to meet changing regional needs (or every six years) and guided by engagement with appropriate Metro advisory committees for land use, housing and homelessness, engagement with jurisdictions, and consultation with interested Tribes.		
	This action positions Metro as the regional amplifier of priorities, with a focus on infrastructure, land readiness, and cross-jurisdictional coordination.		
Adoption or completion year:	2027. Formal adoption not required.	**Implementation year:**	2026
Critical steps to implement the action:	• Convene or engage jurisdictional and interested Tribal partners and Metro advisory committees to identify potential priorities based on guiding principles/values as established by Metro Council • As needed, conduct research, analysis and technical engagement to inform potential strategies • Evaluate feasibility and impact of potential strategies to support prioritization of strategies • Engage advisory committees and Metro Council to inform final list of strategies		
Proposed assessment and tracking of results:	Results will be tracked after three years. It may take multiple state legislative cycles to realize results. Information to track includes: • Amount of state/federal funding secured for housing and infrastructure through this effort • Units enabled • Equity outcomes (e.g., share of funds directed to underserved communities)	**Timeframe for expected impact on addressing housing need:**	2029 onward
Expected magnitude of impact:	**Production**: Medium to High **Affordability/Choice:** Medium	**Needed housing types expected to be produced:**	All housing types, with an emphasis on high-density and middle housing types and affordable rental and home ownership opportunities.
Fair housing issues the action will mitigate or resolve:	**Impacts based on identified focus areas:** Supports accessible and adaptable housing; Supports access to affordable rental housing;	**Needed housing characteristics to produce, including at a**	Action focuses on the production of housing at all tenure and levels of affordability.

	Supports access to affordable homeownership; Addresses and disrupts patterns of segregation, and their correlation with concentrated areas of affluence and poverty; Supports housing stability, anti-displacement and displacement mitigation; Supports access to permanent housing to resolve homelessness.	**minimum tenure and affordability:**	
Needed housing locations to address:	Metro area		
Responsive to feedback theme:	Responsive to feedback received from many engaged groups desiring coordinated and unified focused efforts to bring more resources to the region, particularly to fund infrastructure. This action was supported by several Metro Councilors, the Home Building Association, Implementers Work Group, MTAC, and MPAC.		
Populations that will benefit or be burdened by the action:	TBD based on identified focus areas.	**Complementary actions:**	• Affordable housing funding feasibility

Action #16: Affordable housing funding feasibility

Description:	Consider the viability and feasibility of **new funding for affordable housing development and preservation**. Ensure that any new funding framework is informed by public opinion research and engagement with public, private and nonprofit leaders as well as analysis of housing needs and market conditions, and lessons learned from the 2018 regional housing bond and best practices from other regions, including evaluating opportunities to strengthen racial equity, fair housing and community resilience outcomes and alignment/integration with homeless and supportive housing services.		
Adoption or completion year:	As determined by the Council.	**Implementation year:**	As determined by the Council.
Critical steps to implement the action:	Evaluation of feasibility and viability • Public opinion research • Preliminary engagement with coalition and jurisdictional partners • Evaluation of political viability Funding framework development (contingent on Metro Council direction based on initial evaluation of feasibility/viability) • Analysis of housing needs, market trends, and state and federal funding landscape, and lessons learned from 2018 Housing bond, building on previous research and engagement • Engagement of jurisdictional leadership, coalition partners, and impacted parties to inform policy priorities and funding allocation framework • Engagement with OHCS and other funders to support coordinated funding strategies • Production modeling • Identification and development of strategies that affirmatively further fair housing by addressing disparities in housing needs, promoting access to opportunity, and addressing patterns of segregation • Development of braided funding approaches to support inclusion of deeply affordable and supportive housing for those exiting homelessness • Additional public opinion research to inform scale and priorities		
Proposed assessment and tracking of results:	TBD – contingent on Metro Council direction For example, previous Metro housing bond tracking included: • Production dashboard updated quarterly, • Annual report highlighting production and policy outcomes, including outcomes	**Timeframe for expected impact on addressing housing need:**	TBD - dependent on feasibility and viability. In general, new affordable housing funding can lead to new housing units opening within three years—or sooner if the

	for advancing racial equity throughout project selection, design, construction, and initial lease up • Independent oversight body • Financial audits		investment strategy includes acquisition and preservation.
Expected magnitude of impact:	**Production:** High - Thousands of new or preserved affordable homes, including a mix of housing types, unit sizes/configurations, affordability levels, and housing aligned with culturally responsive and appropriate services to meet the needs of people experiencing or at risk of homelessness. **Affordability/Choice:** High	**Needed housing types expected to be produced:**	Regulated affordable housing
Fair housing issues the action will mitigate or resolve:	Potential for funding allocation and location policies to support geographic distribution of new affordable housing everywhere in the region and to support prioritization of locations that provide access to opportunities, services and amenities. Potential for new requirements related to equitable access, affirmative marketing, community co-design, and equitable operations to support long term stability. Potential for braided funding strategies to align supportive services for households experiencing or at risk of homelessness. **Direct effects:** Supports accessible and adaptable housing; Supports access to affordable rental housing; Supports access to affordable homeownership; Supports access to community assets and mitigation of exposure to harms;	**Needed housing characteristics to produce, including at a minimum tenure and affordability:**	To be determined through policy framework development, but likely including: • Primarily affordable rental with some CLT or other alternative homeownership units • Mix of affordability levels (0-80 percent AMI), as informed by analysis of gaps/needs • Mix of unit sizes, including family-sized units, as informed by analysis of gaps/needs • Mix of building types, including smaller scale and missing middle types as

	Addresses issues associated with historically underserved or marginalized communities and protected classes; Addresses and disrupts patterns of segregation, and their correlation with concentrated areas of affluence and poverty; Supports housing stability, anti-displacement and displacement mitigation; Supports access to permanent housing to resolve homelessness.		informed by analysis of gaps/needs • Consideration for acquisition/conversion and preservation, as well as new construction
Needed housing locations to address:	Geographic distribution of new affordable housing everywhere in the region, with a particular focus on reaching areas that provide access to opportunities, services and amenities.		
Responsive to feedback theme:	Responds to feedback received from jurisdictional staff and leadership as well as industry and community partners. This idea was consistently raised and supported throughout engagement with all of the groups we engaged.		
Populations that will benefit or be burdened by the action:	Potential to benefit households disproportionately impacted by housing instability and homelessness, including: • Households with low incomes • Communities of color • People with disabilities • Older adults • Veterans • Families with children, especially single-parent families • Youth exiting foster care	**Complementary actions:**	• Affordable housing operational stabilization strategy • Innovative approaches • Regional land bank plan • Equitable access to regulated affordable housing • Community co-design • Regional affordable housing Inventory and listing service • Improvements to voucher and other rental assistance policies and implementation

CONCLUSION

The challenge of creating and sustaining housing options that meet the diverse needs, household configurations, and income levels of people in our region is too big for any single jurisdiction. Collective efforts are needed now more than ever. This RHCS provides a framework for regional coordination and collaboration to guide progress toward a future where all people in the region have access to safe, affordable and stable housing. Once adopted by Metro Council, the RHCS will guide Metro's actions over the next six years (2026-2031). It will be followed by the development of more detailed work plans and continued engagement to further shape the work and ensure responsiveness to needs, opportunities and shared values.

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If you picnic at Blue Lake or take your kids to the Oregon Zoo, enjoy symphonies at the Schnitz or auto shows at the convention center, put out your trash or drive your car – we've already crossed paths.

So, hello. We're Metro – nice to meet you.

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Brian Evans
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Portland, OR 97232-2736
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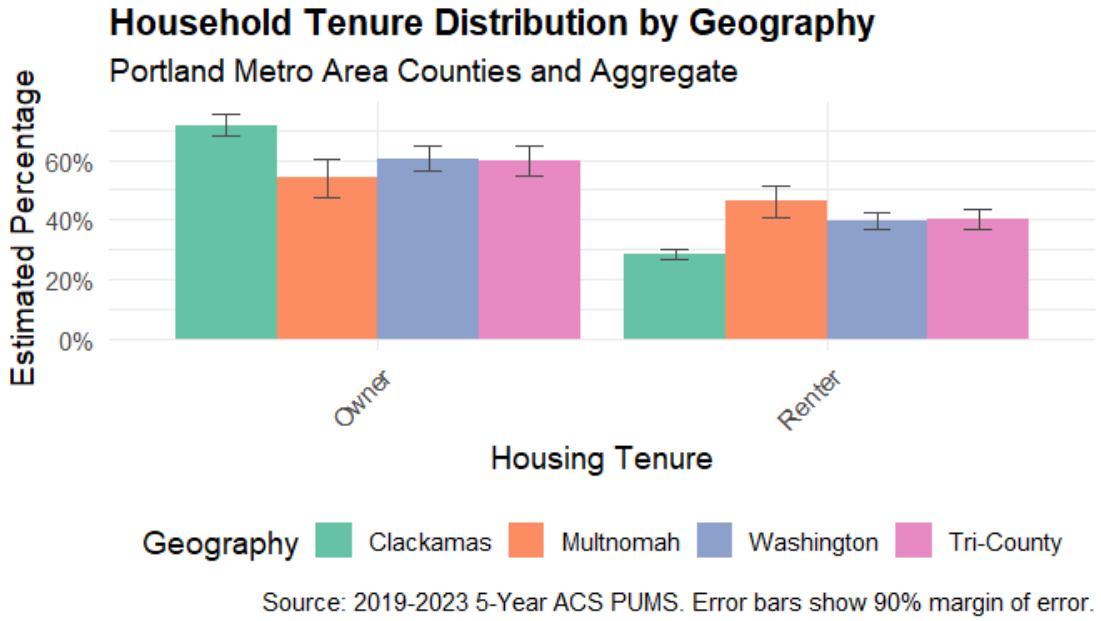
Household Socioeconomic and Demographic Characteristics

Considerations related to census data

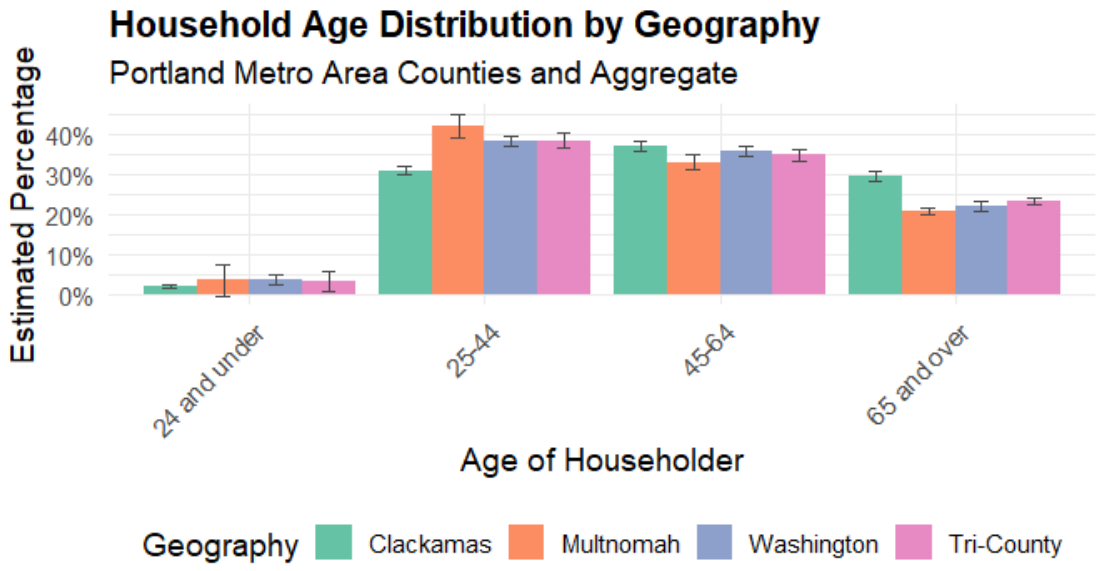
Different communities have different levels of comfort while engaging with government censuses and surveys, which can result in undercounts. Additionally, estimates of smaller and harder-to-count populations tend to have less reliability than estimates for larger segments of the population. To increase reliability, the American Community Survey often publishes aggregated categories, which can mask important trends in the data, especially regarding race, ethnicity, and language.

The default confidence interval for both ACS and PUMS data is 90%, as this is the statistical standard set by the U.S. Census Bureau for publishing these estimates. This means that the published margin of error corresponds to a 90% confidence level, providing approximately 90% certainty that the true population value falls within the calculated confidence bounds.

Household Tenure

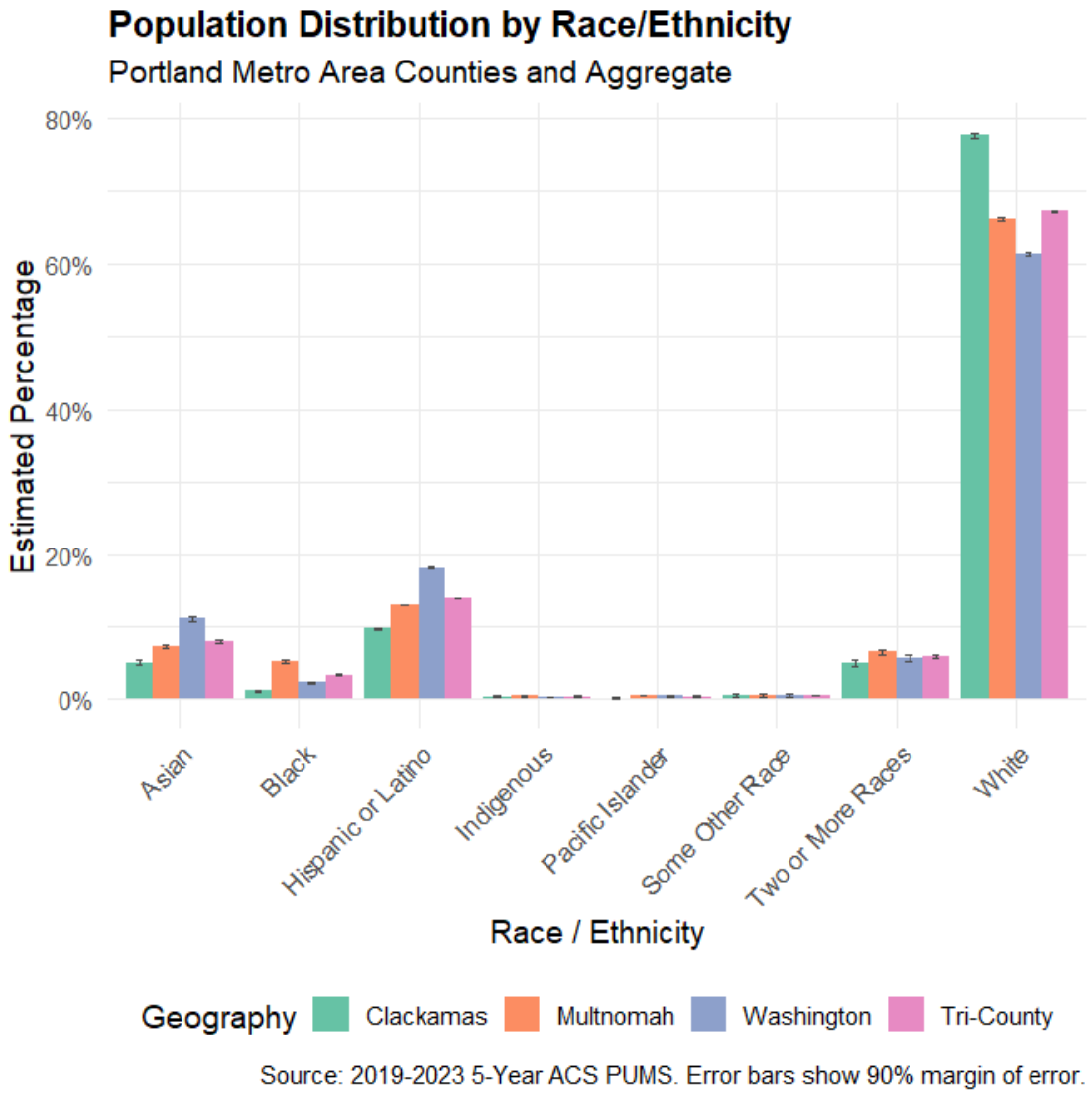


Age of Householder

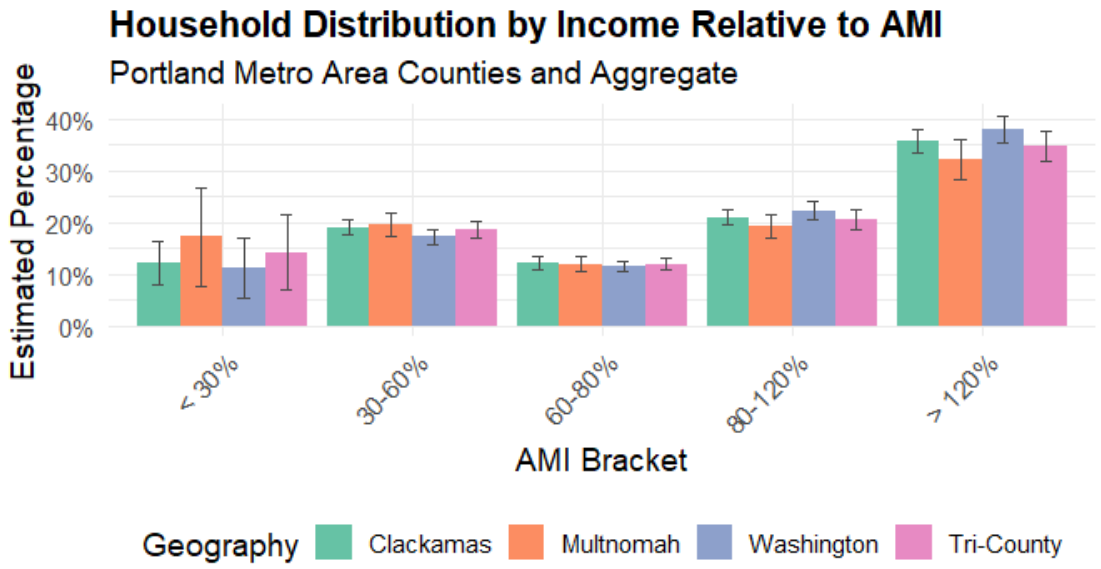


Source: 2019-2023 5-Year ACS PUMS. Error bars show 90% margin of error.

Race and Ethnicity

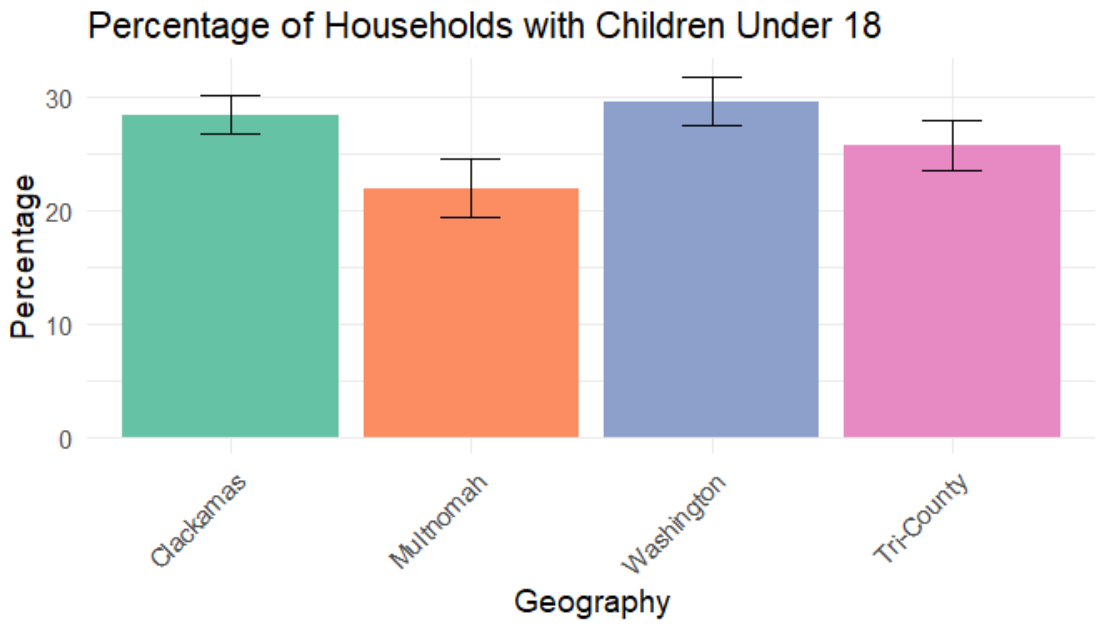


Household Income Relative to Area Median Income (AMI)

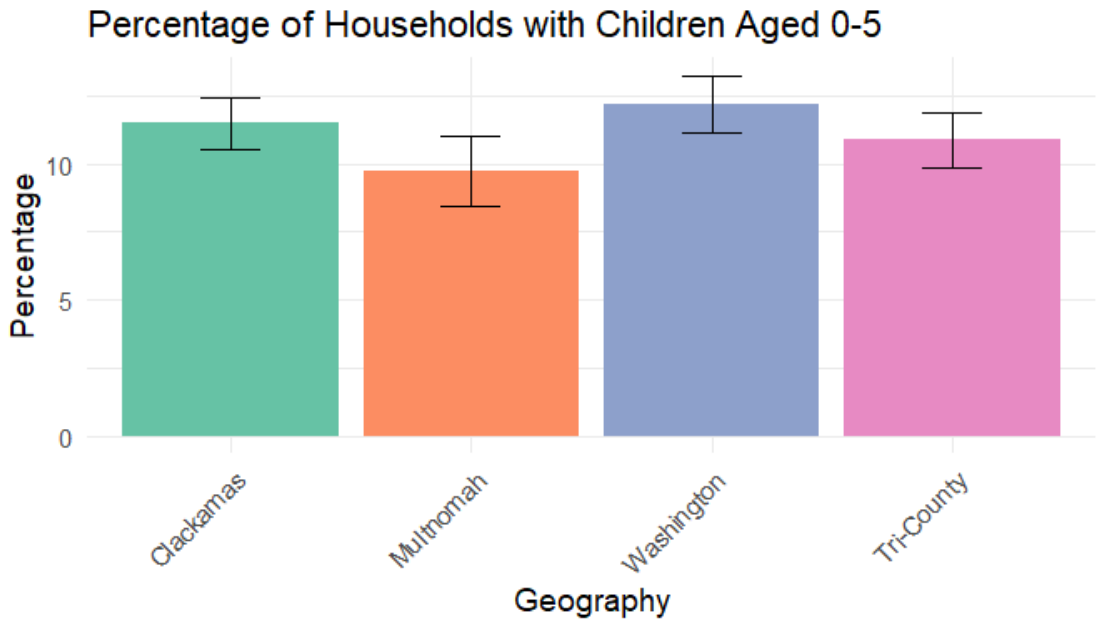


Source: 2019-2023 5-Year ACS PUMS. Error bars show 90% margin of error.

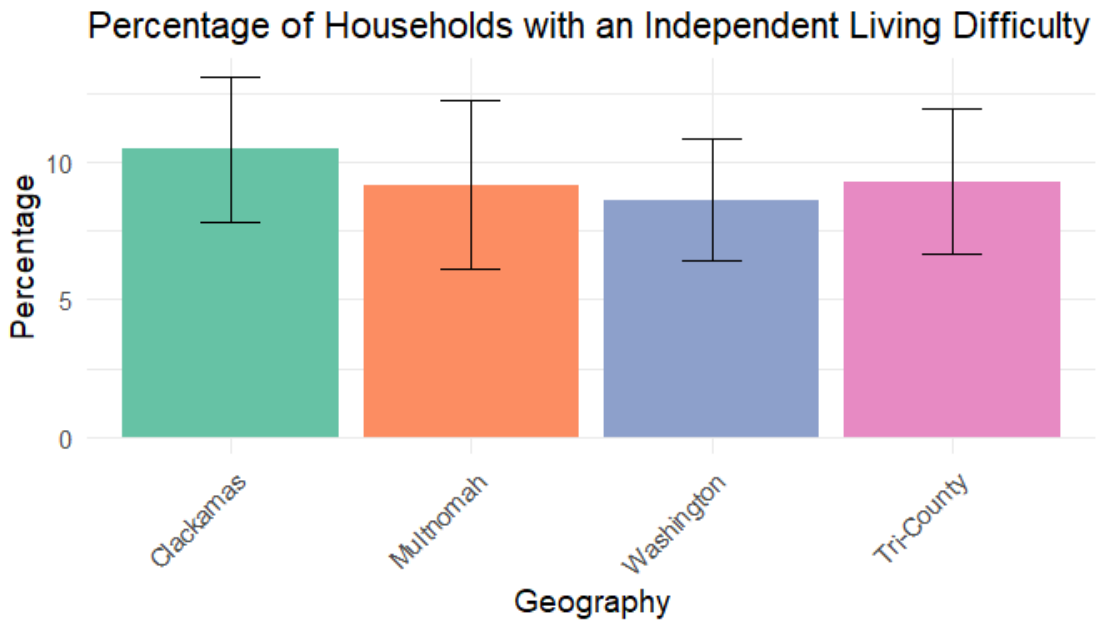
Households with Children



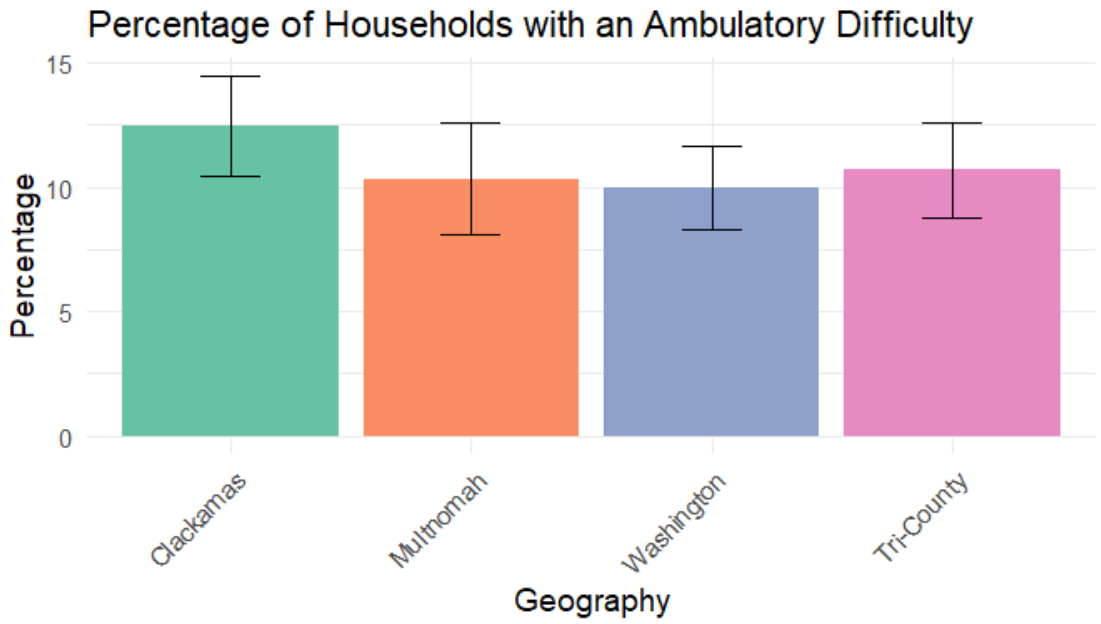
Households with Children Aged 0-5



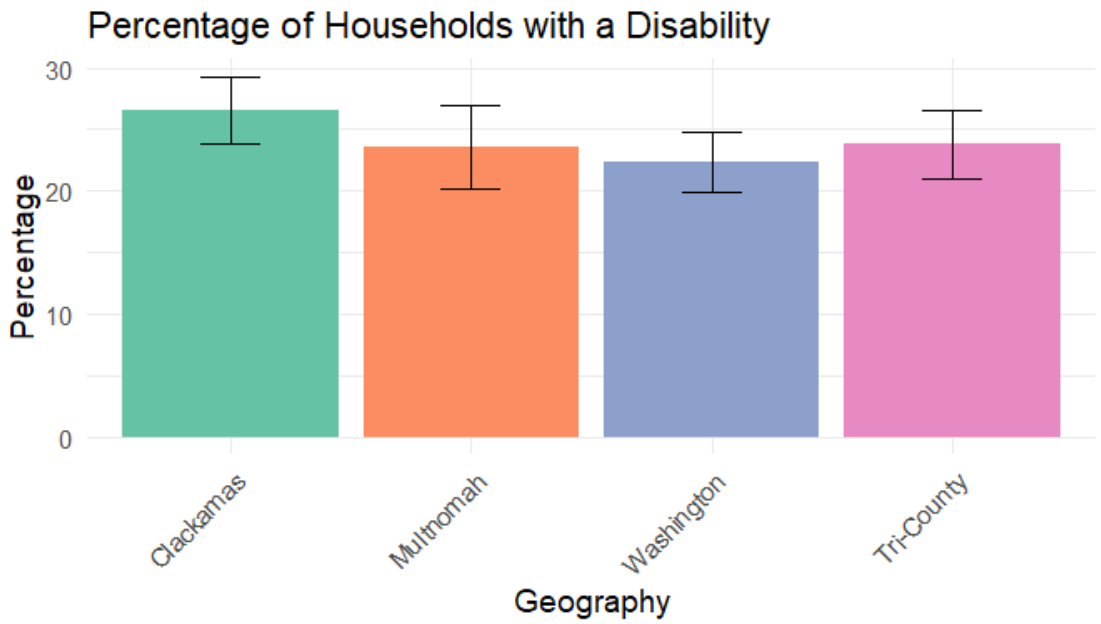
Households with an Independent Living Difficulty



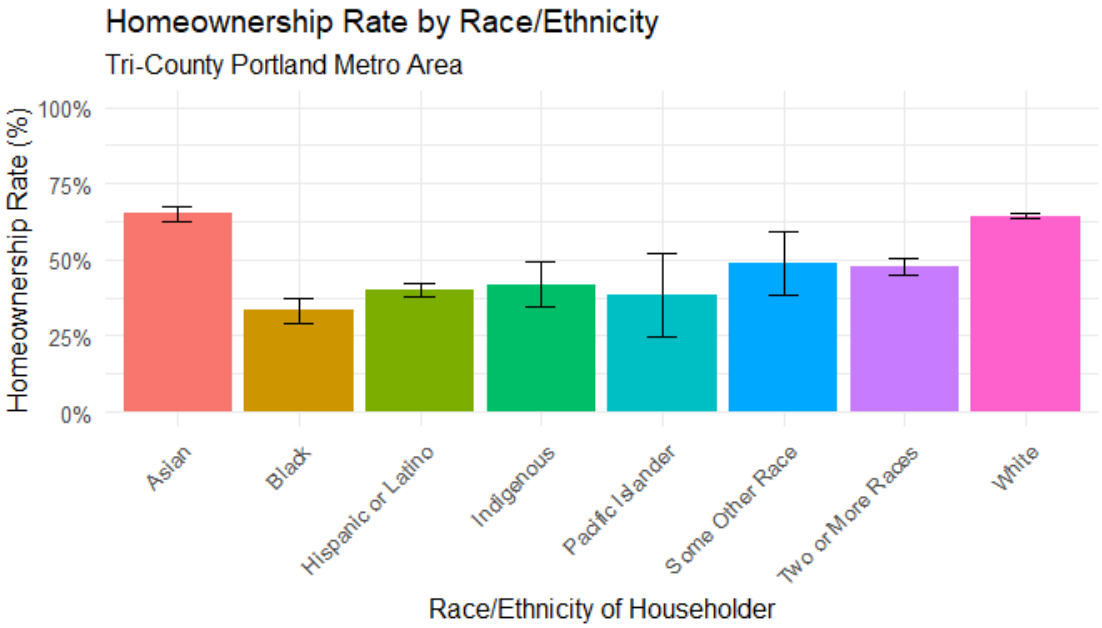
Households with an Ambulatory Difficulty



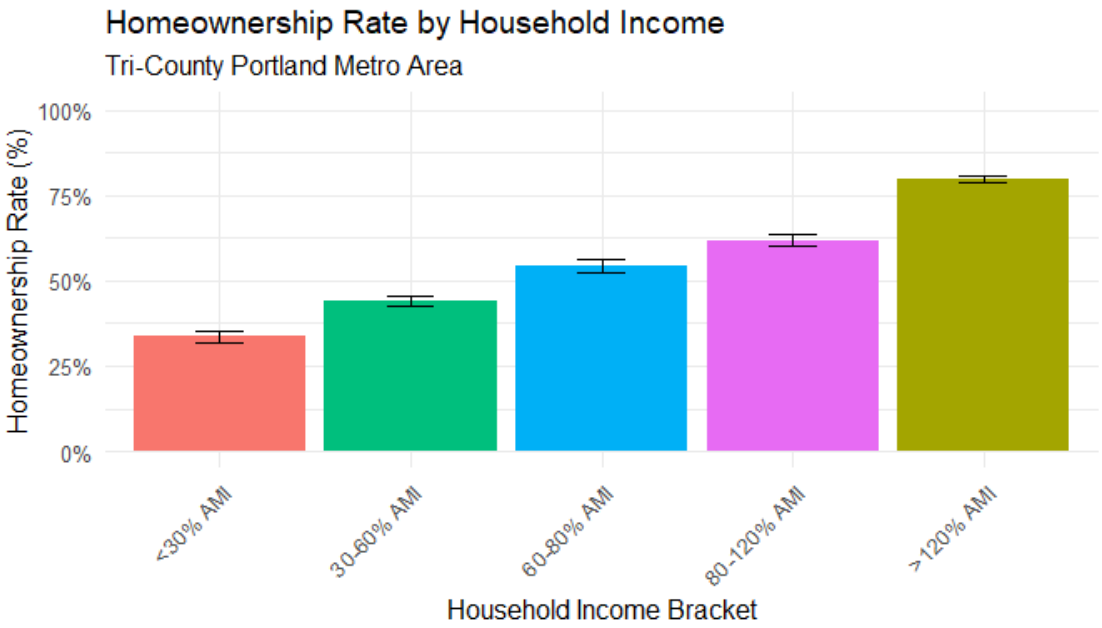
Households with a Disability



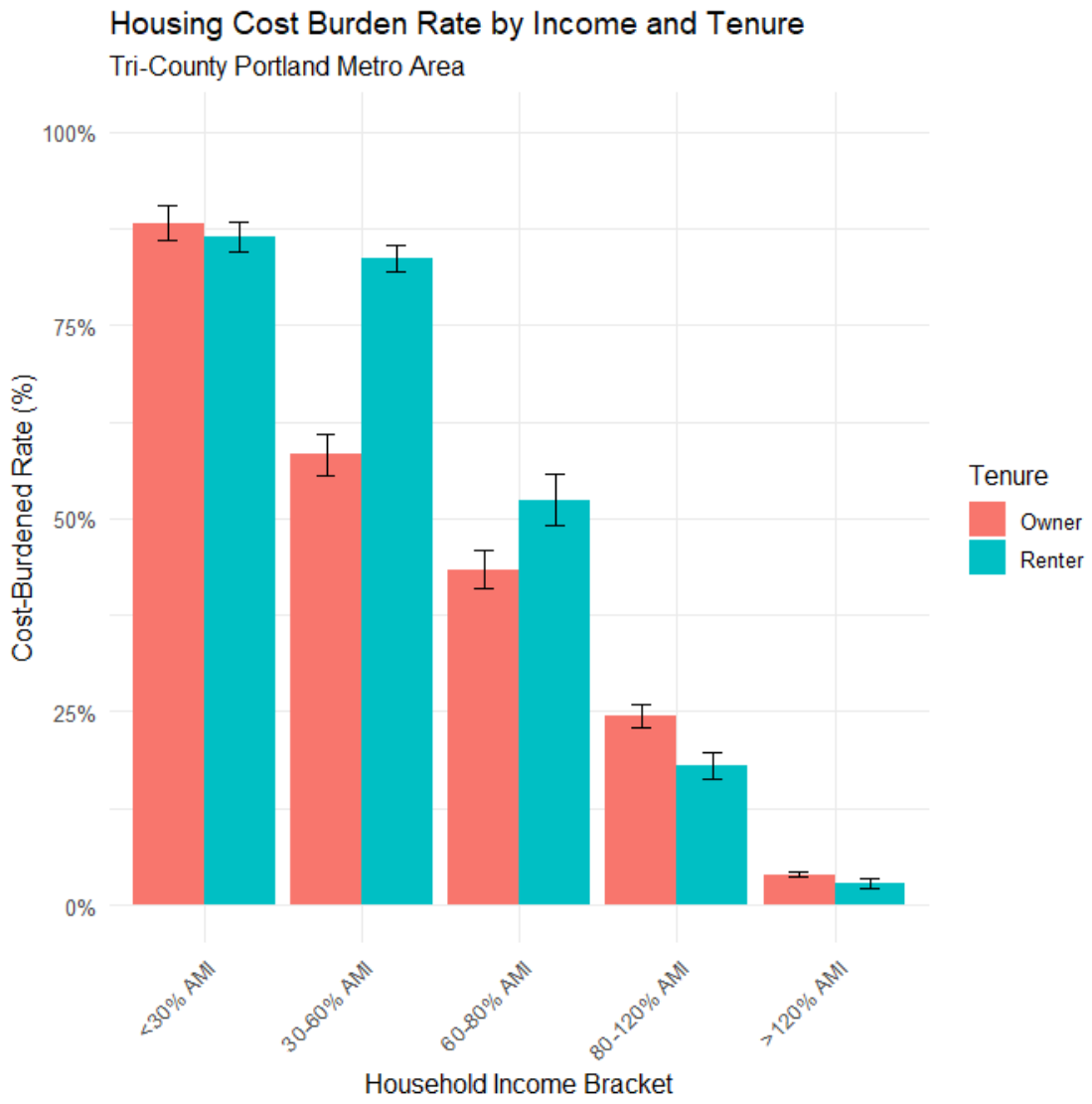
Home Ownership Rate by Race/Ethnicity



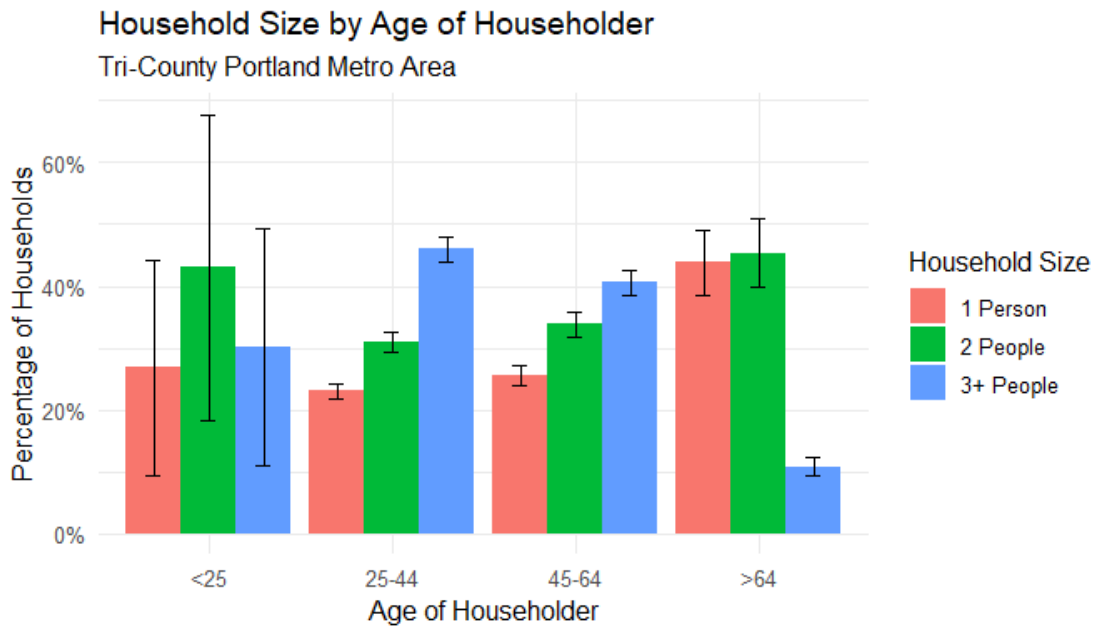
Home Ownership Rate by Household Income (AMI)



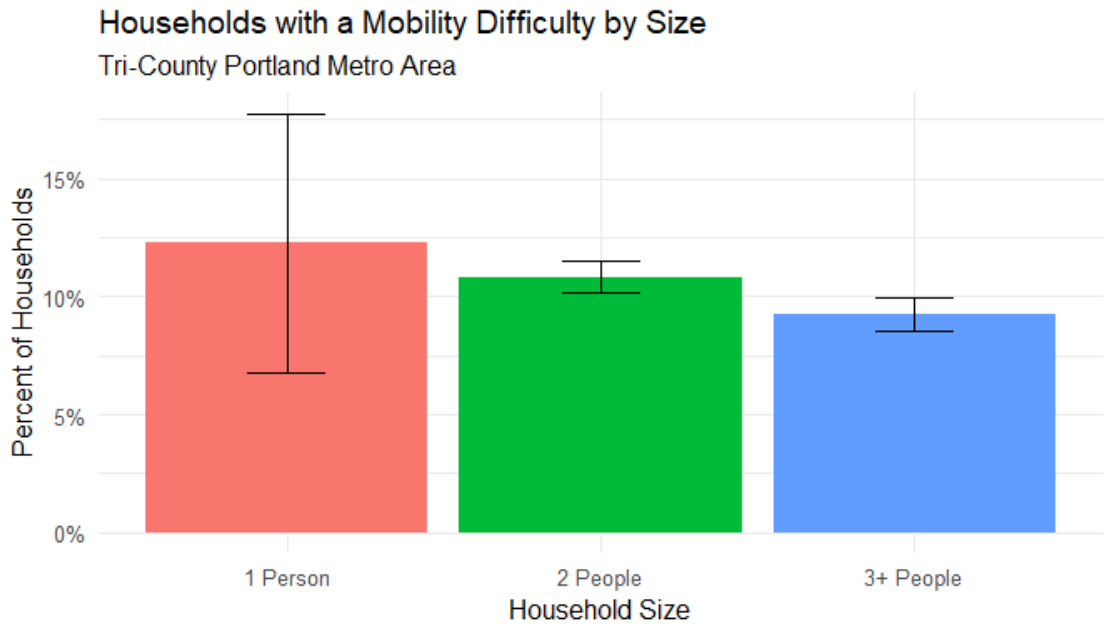
Housing Cost Burden Rate by Income and Tenure



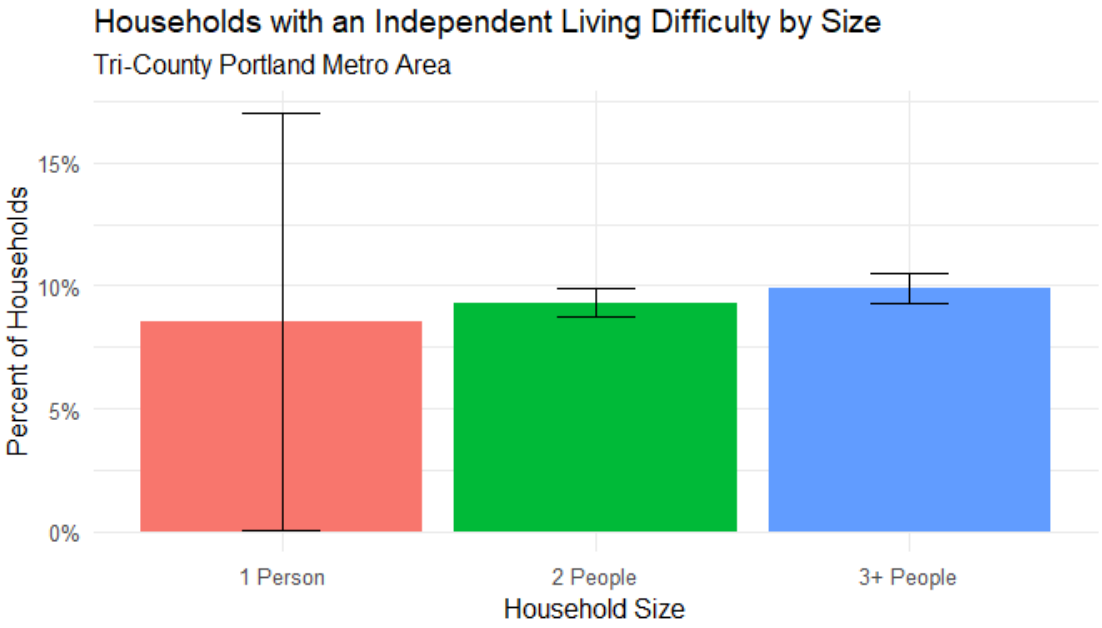
Household Size by Age of Householder



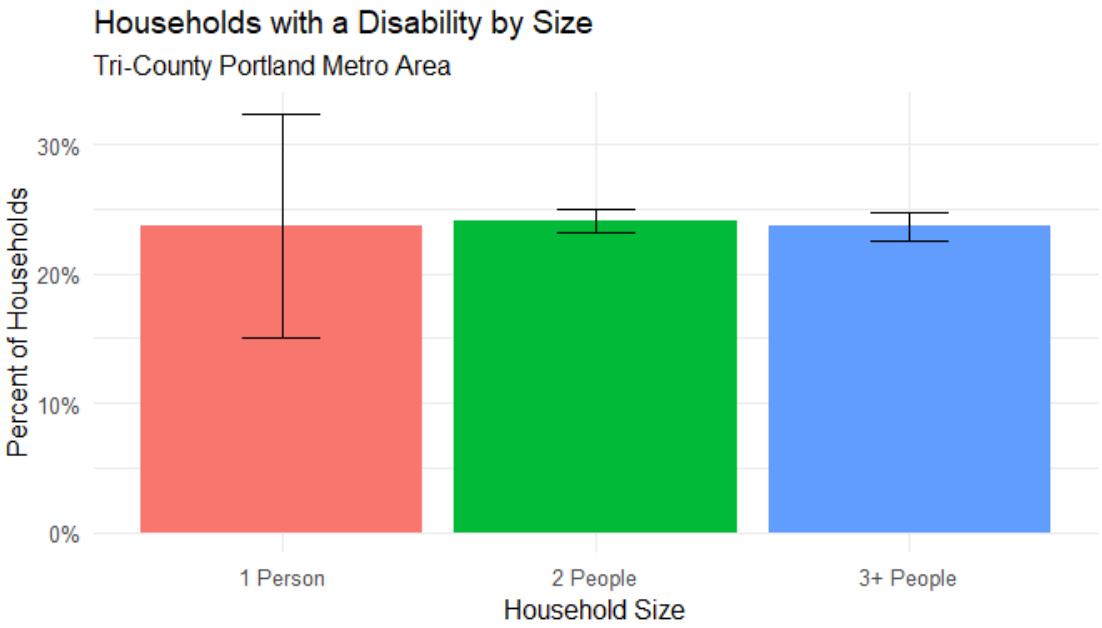
Household with a Mobility Disability by Household Size



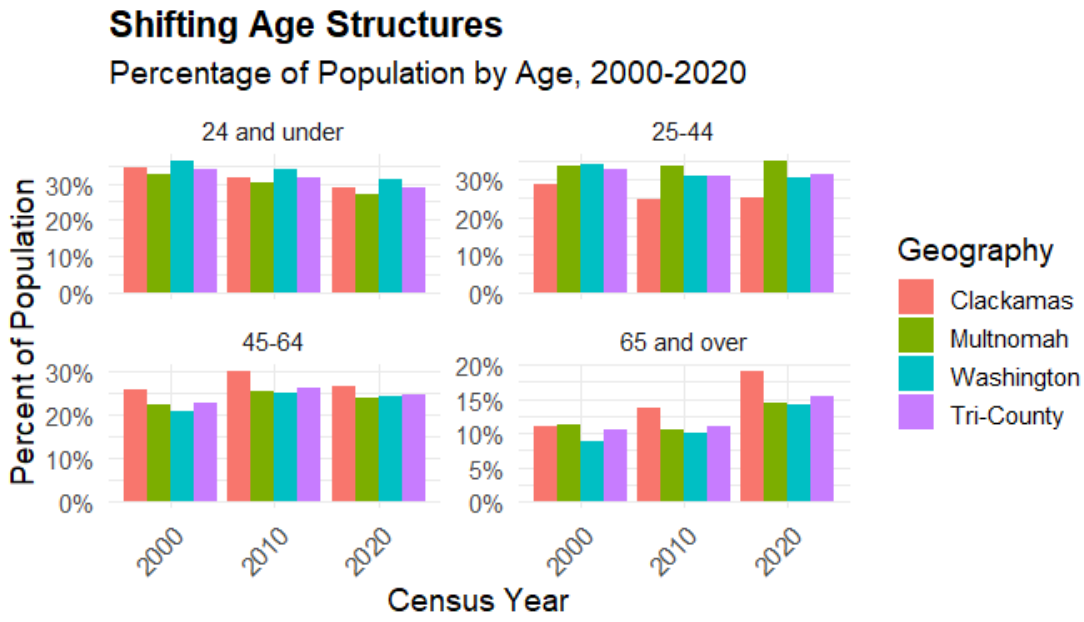
Households with an Independent Living Difficulty by Household Size



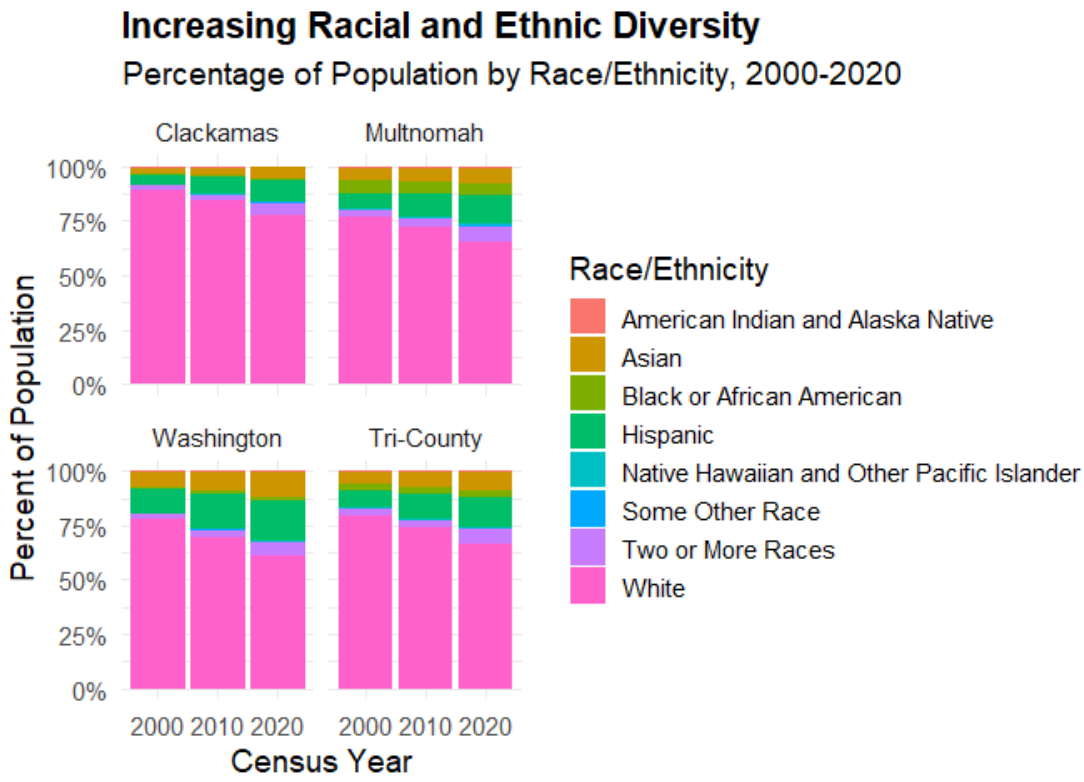
Households with a Disability by Household Size



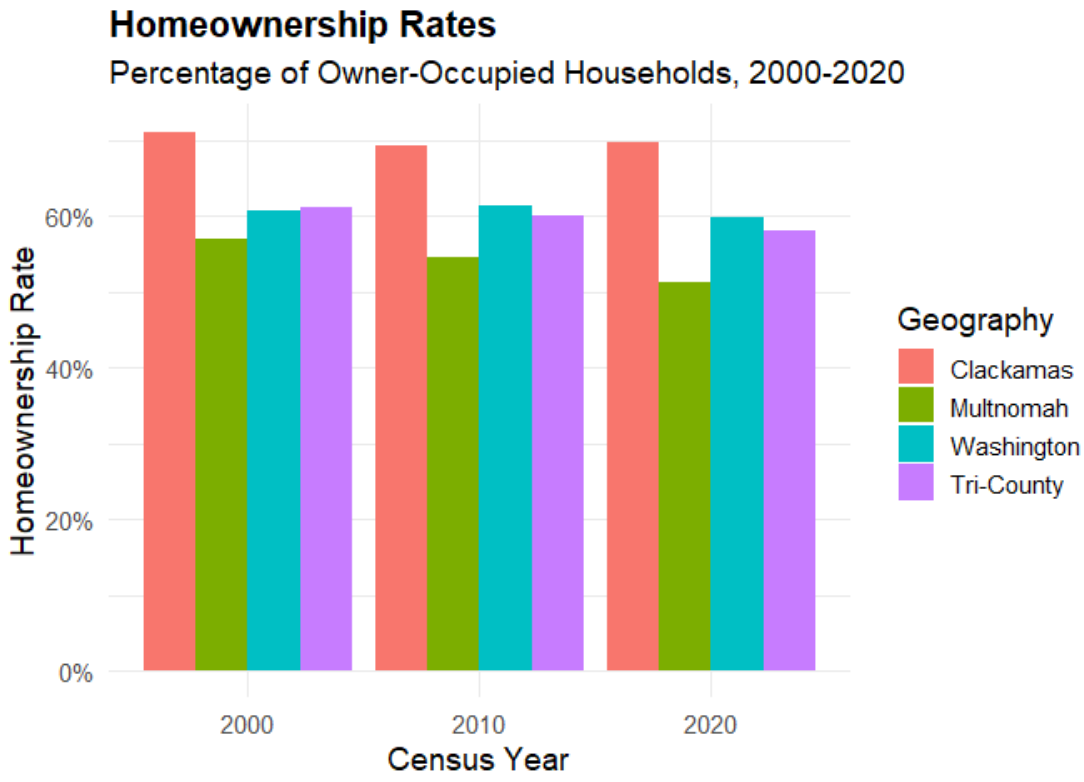
Age Time Series



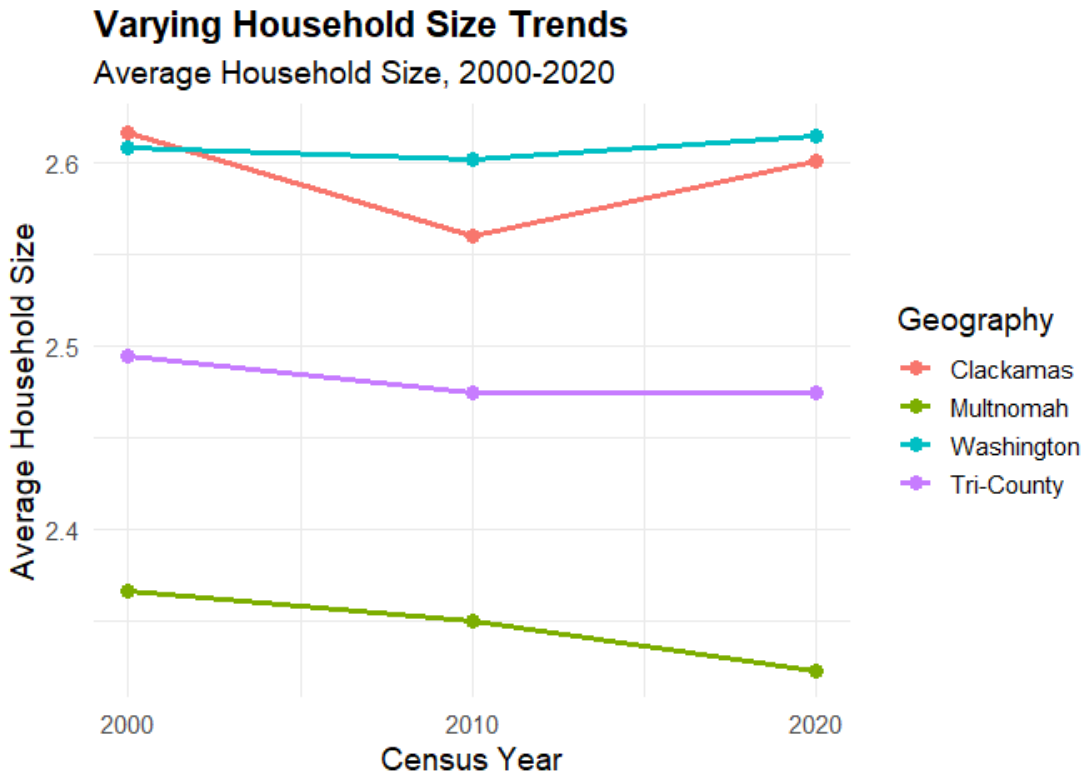
Race and Ethnicity Time Series

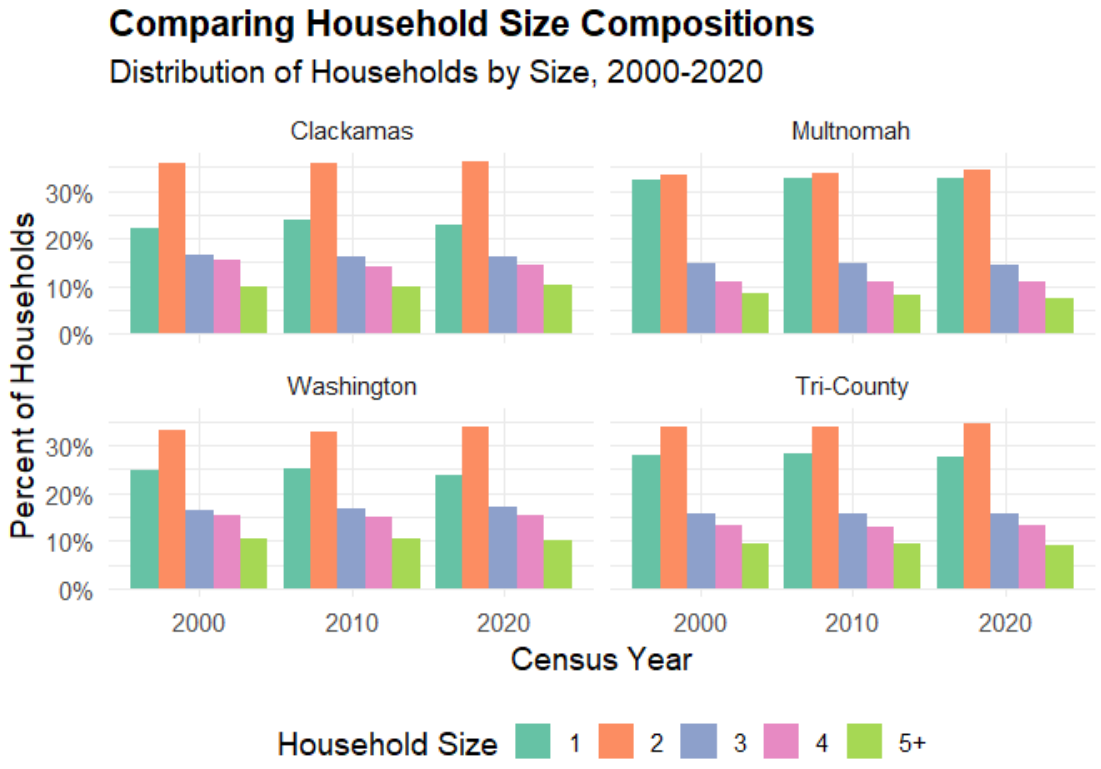


Tenure Time Series

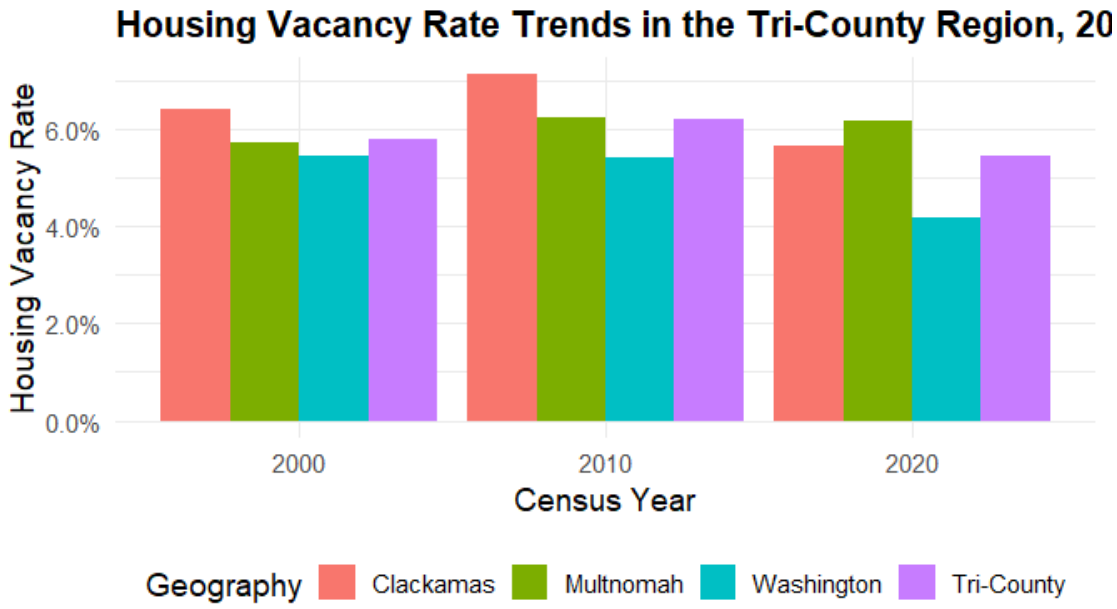


Household Size Time Series

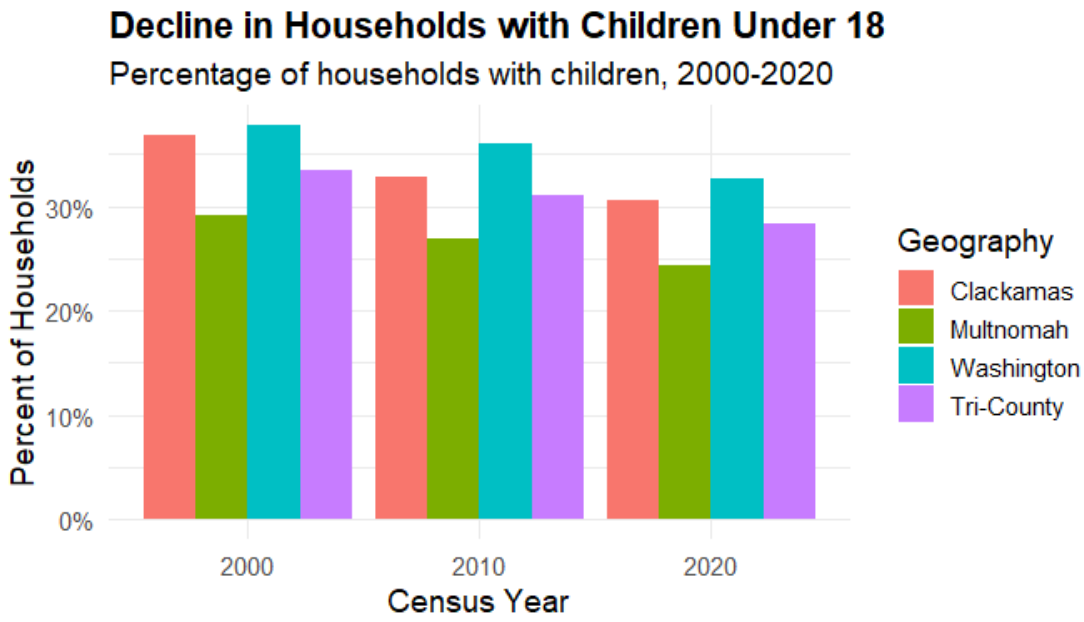




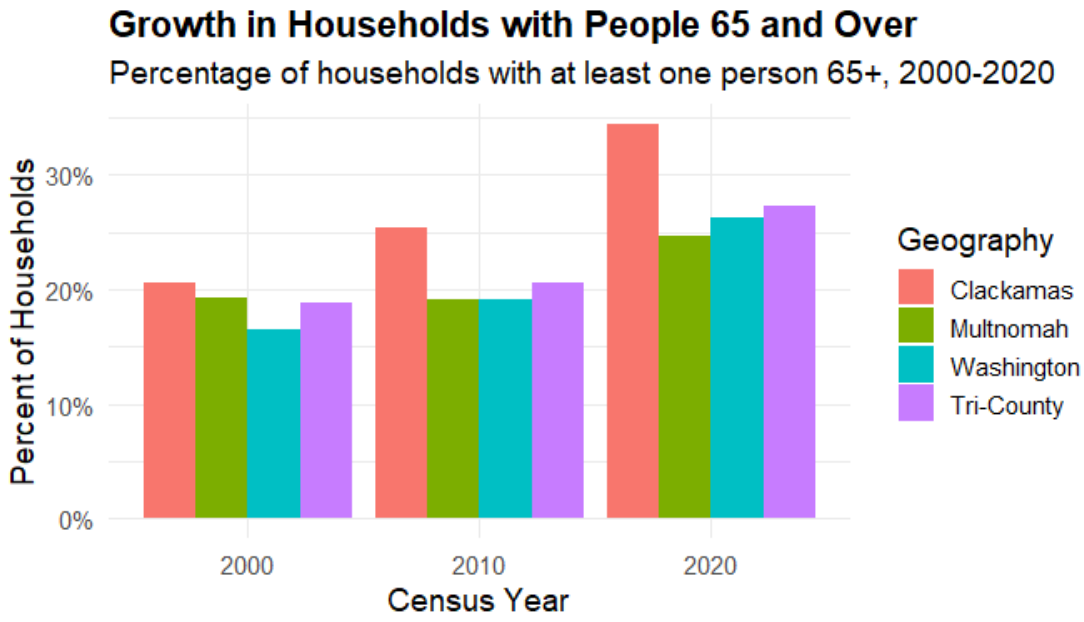
Vacancy



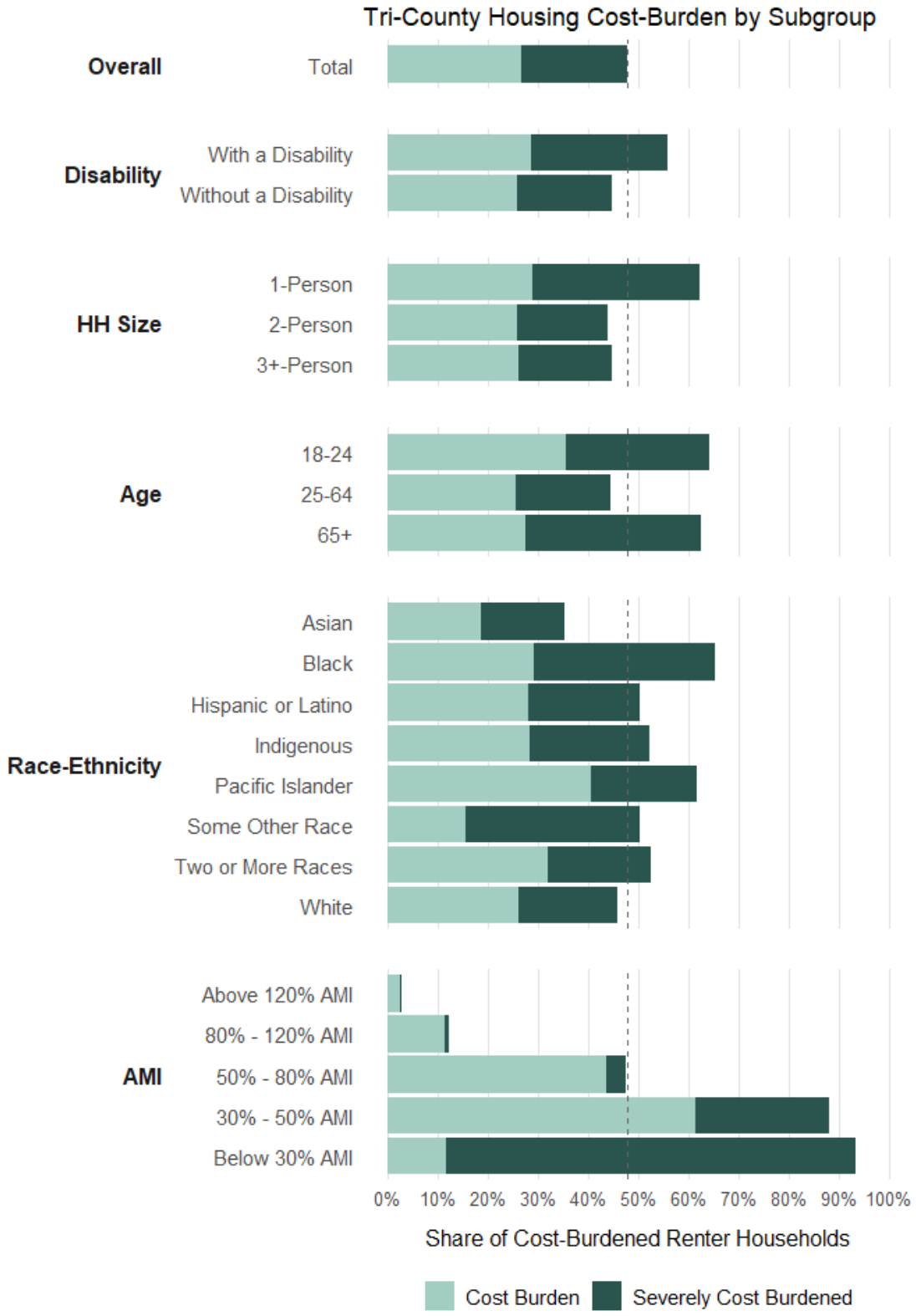
Households with Children



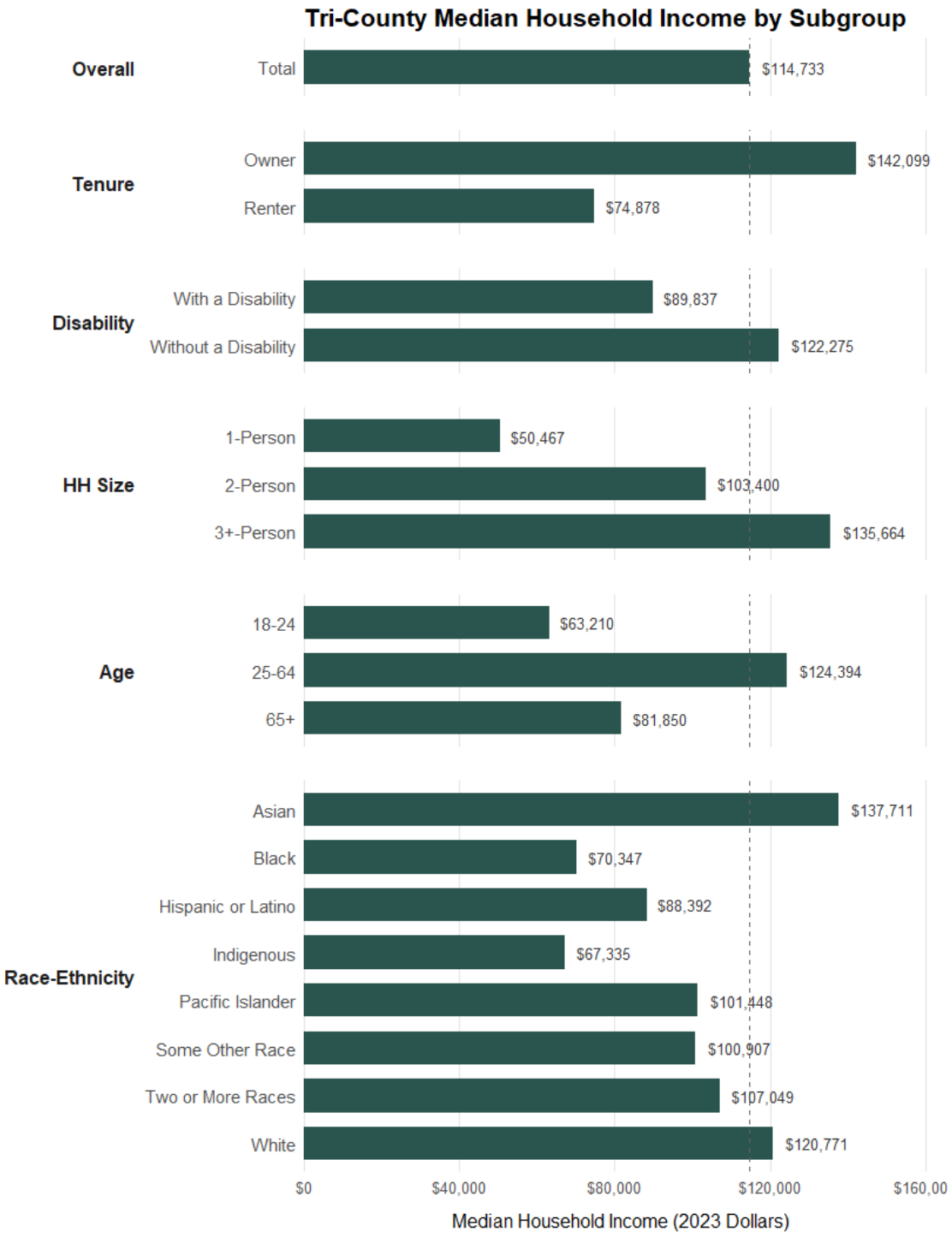
Households with Seniors



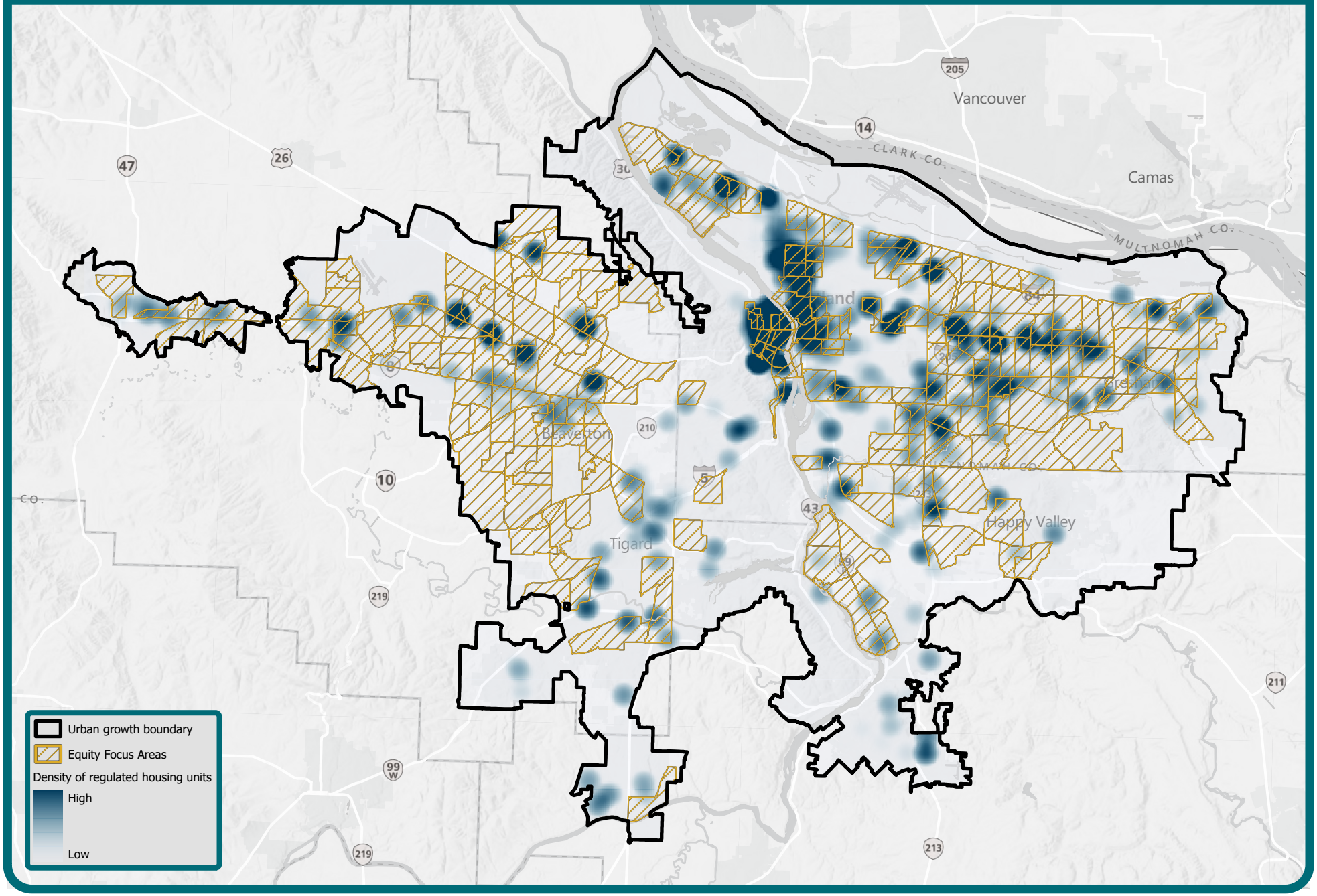
Cost Burdened Renter Households by Demographics



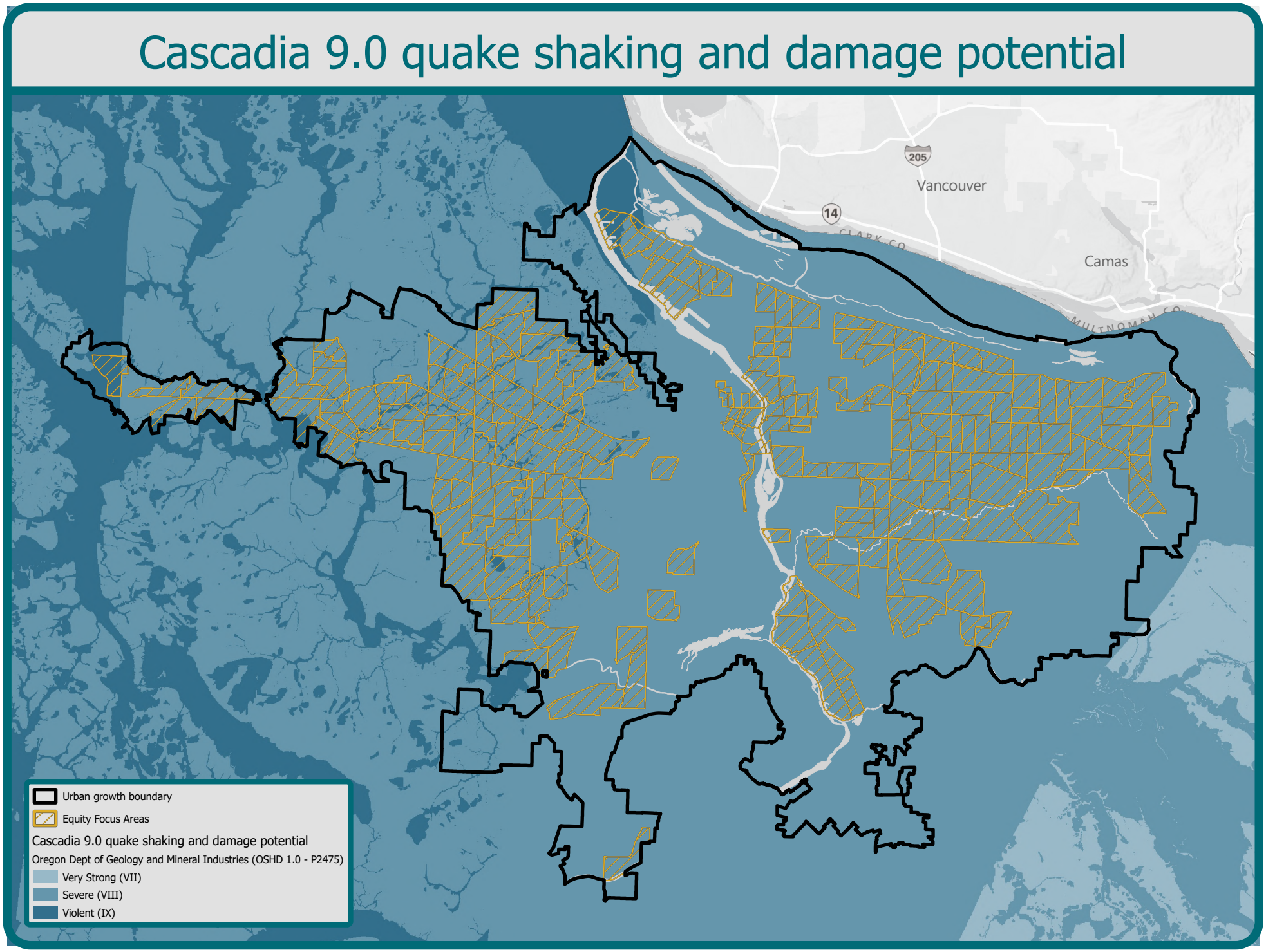
Median Income Cross-Tabulations



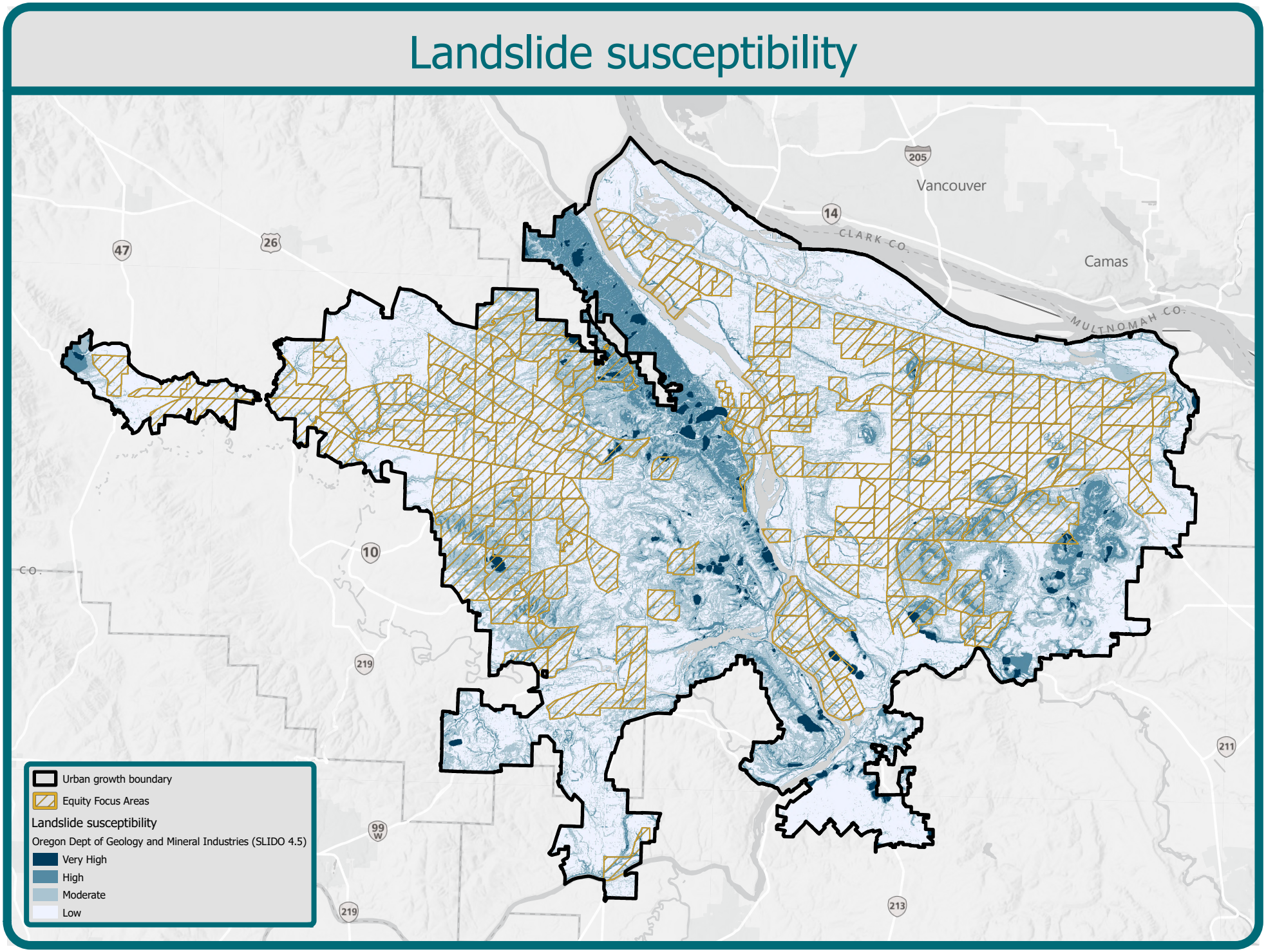
Regulated Affordable Housing Inventory (RAHI)



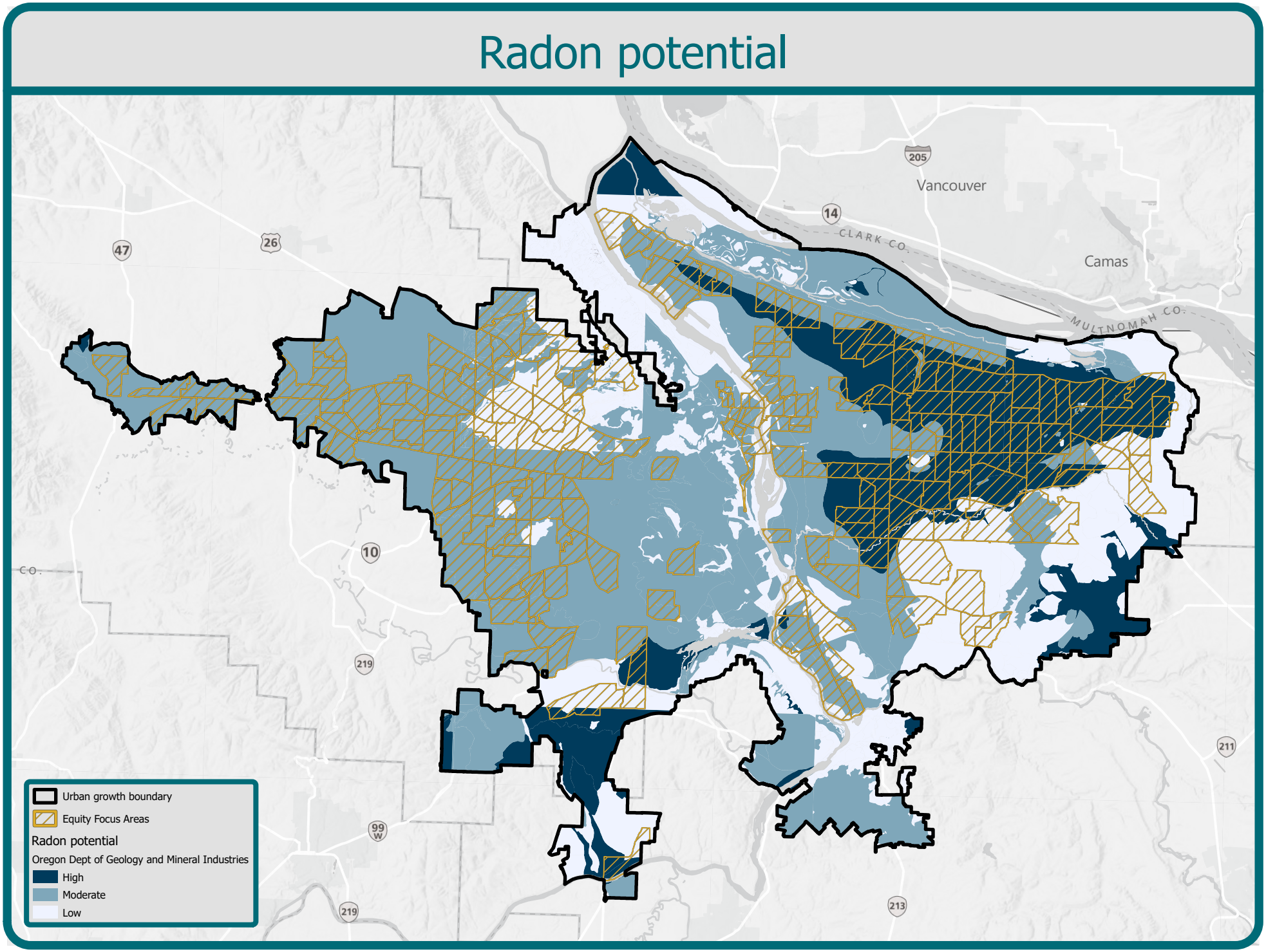
Cascadia 9.0 quake shaking and damage potential



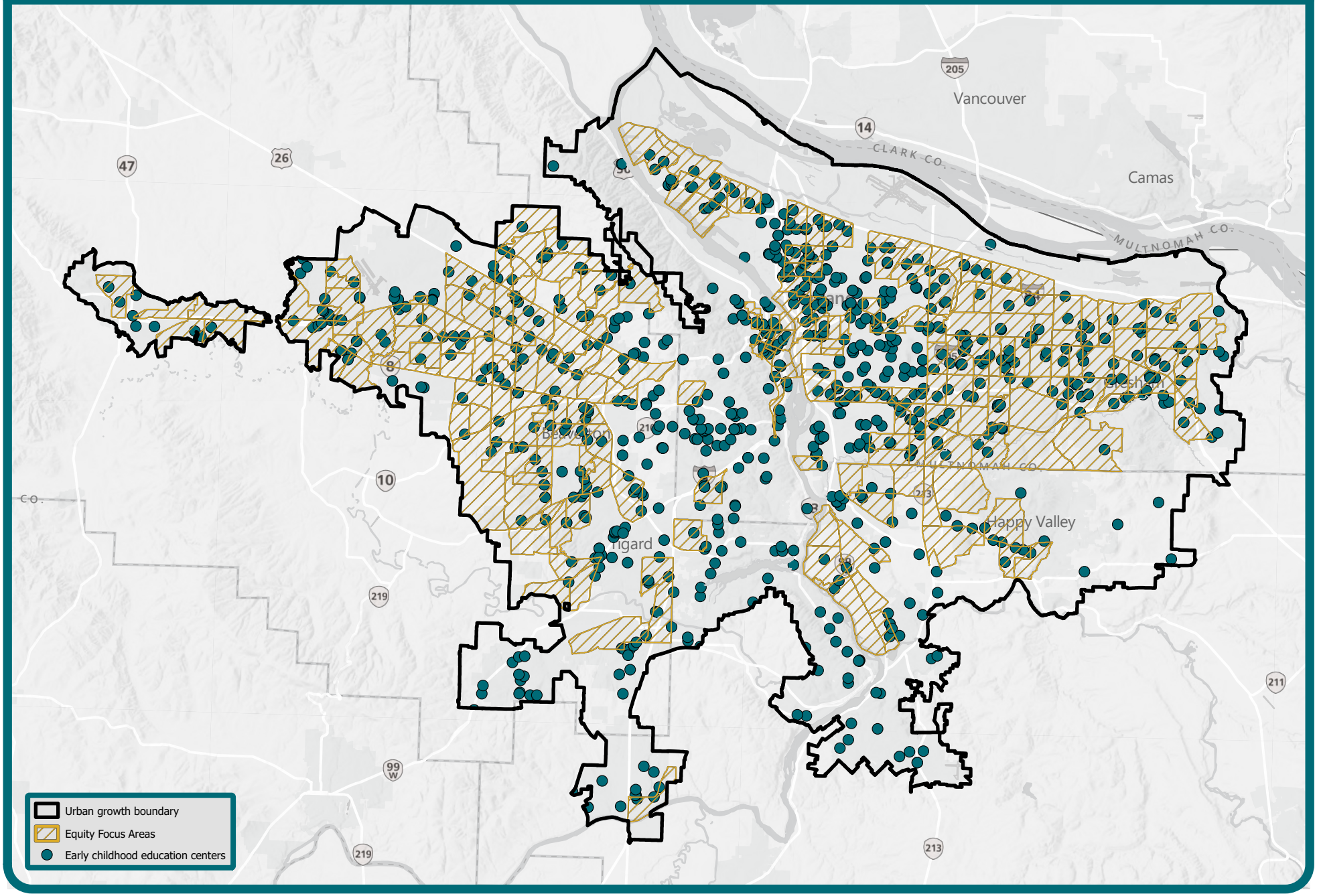
Landslide susceptibility



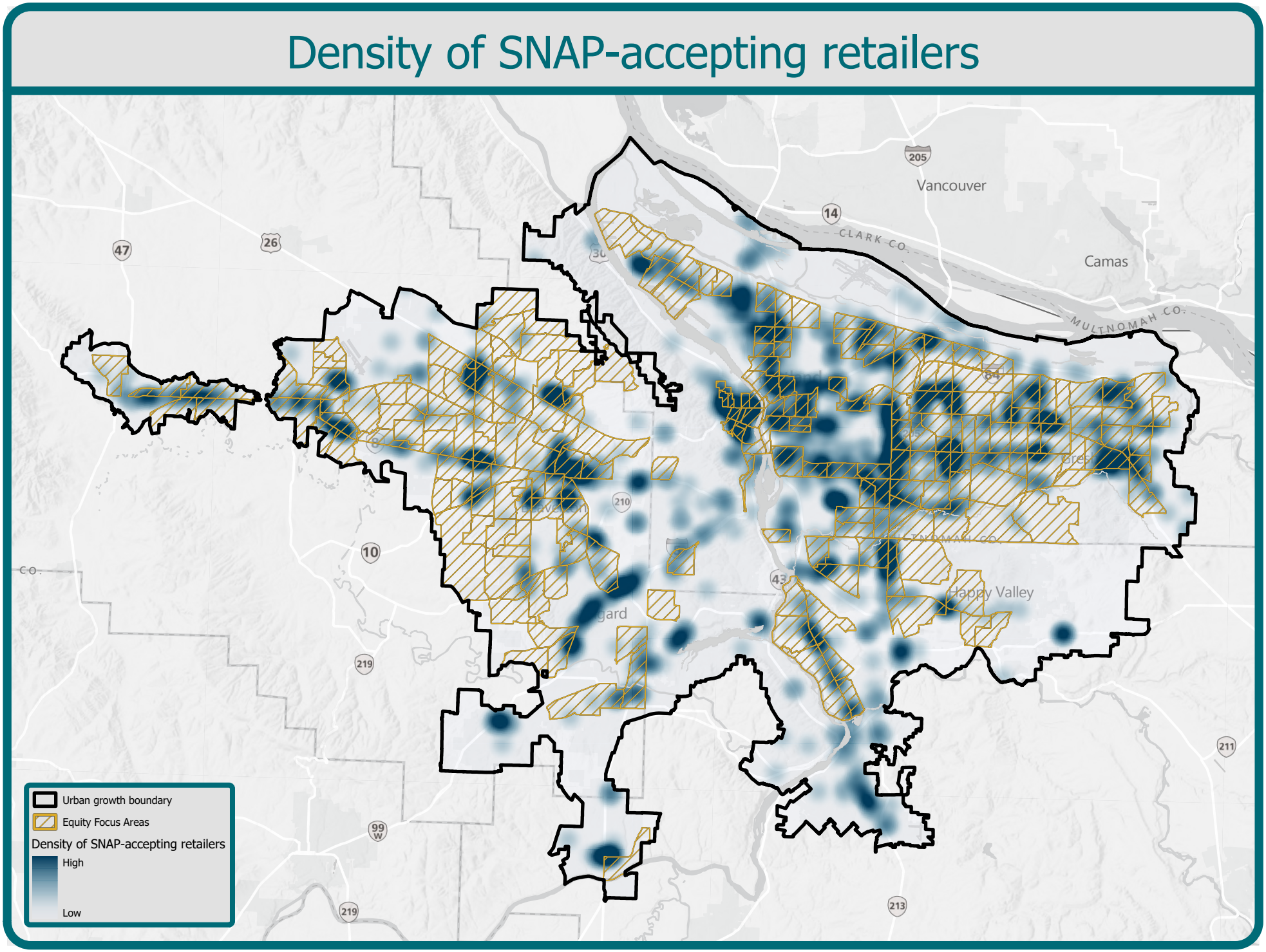
Radon potential



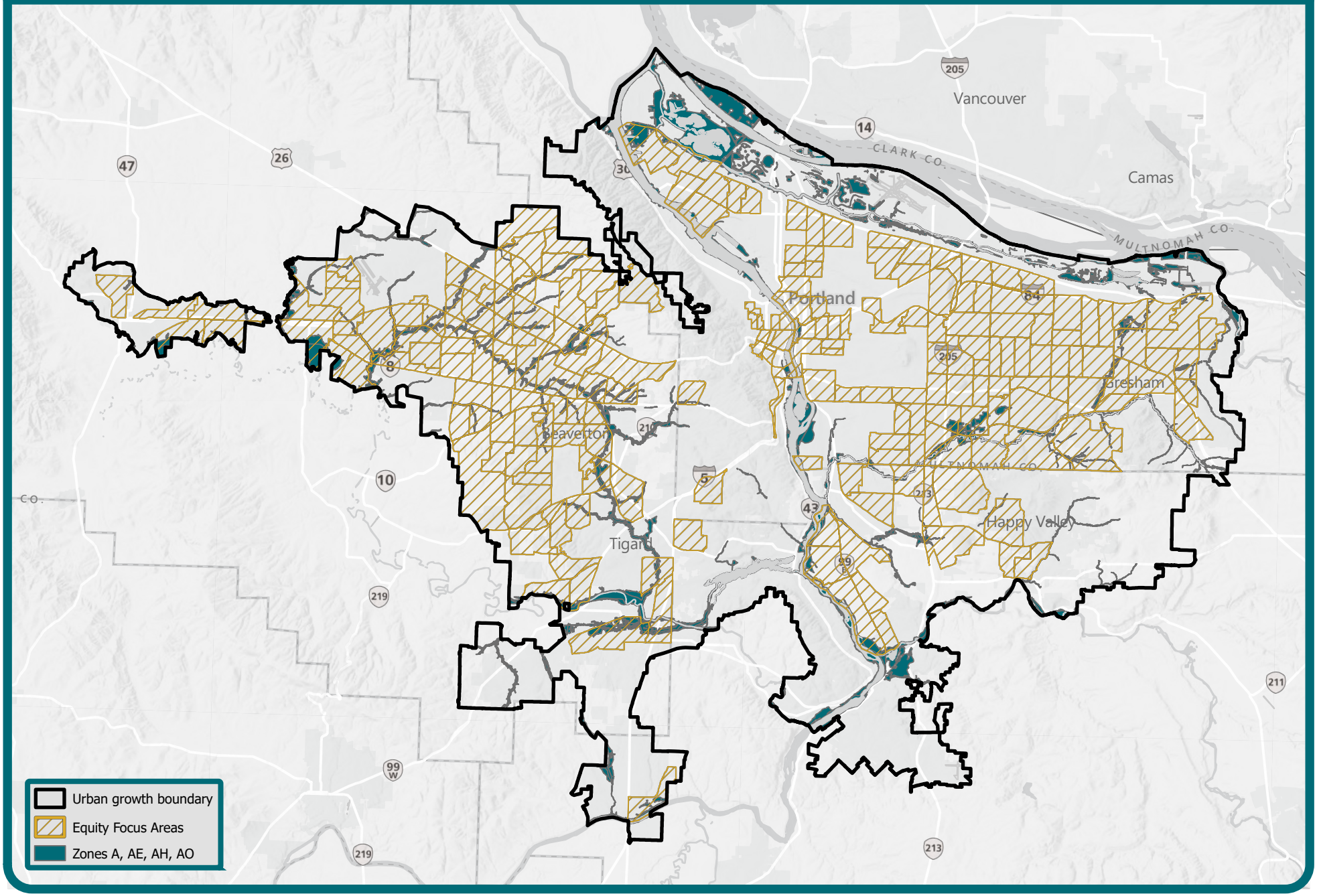
Early childhood education centers



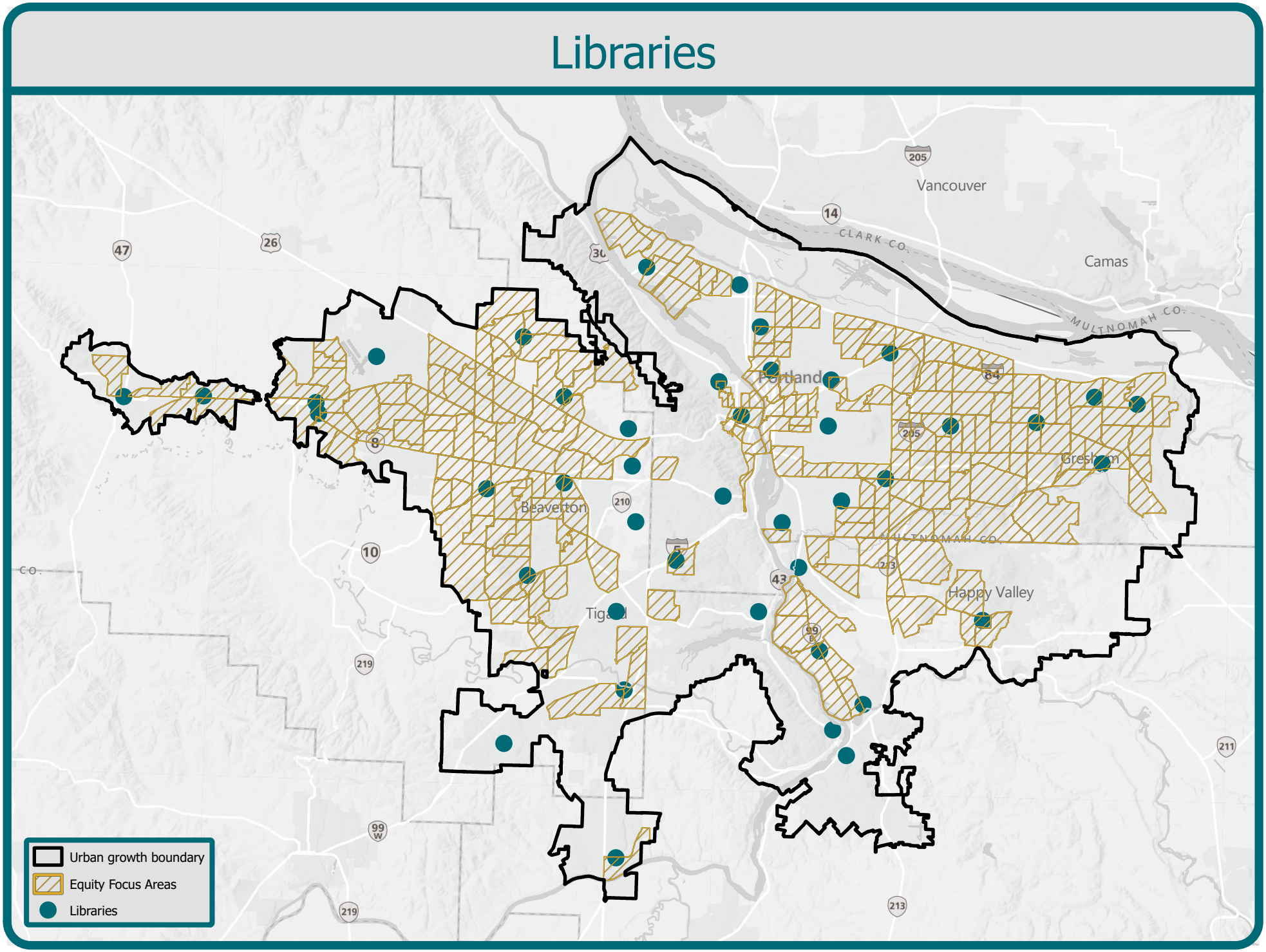
Density of SNAP-accepting retailers



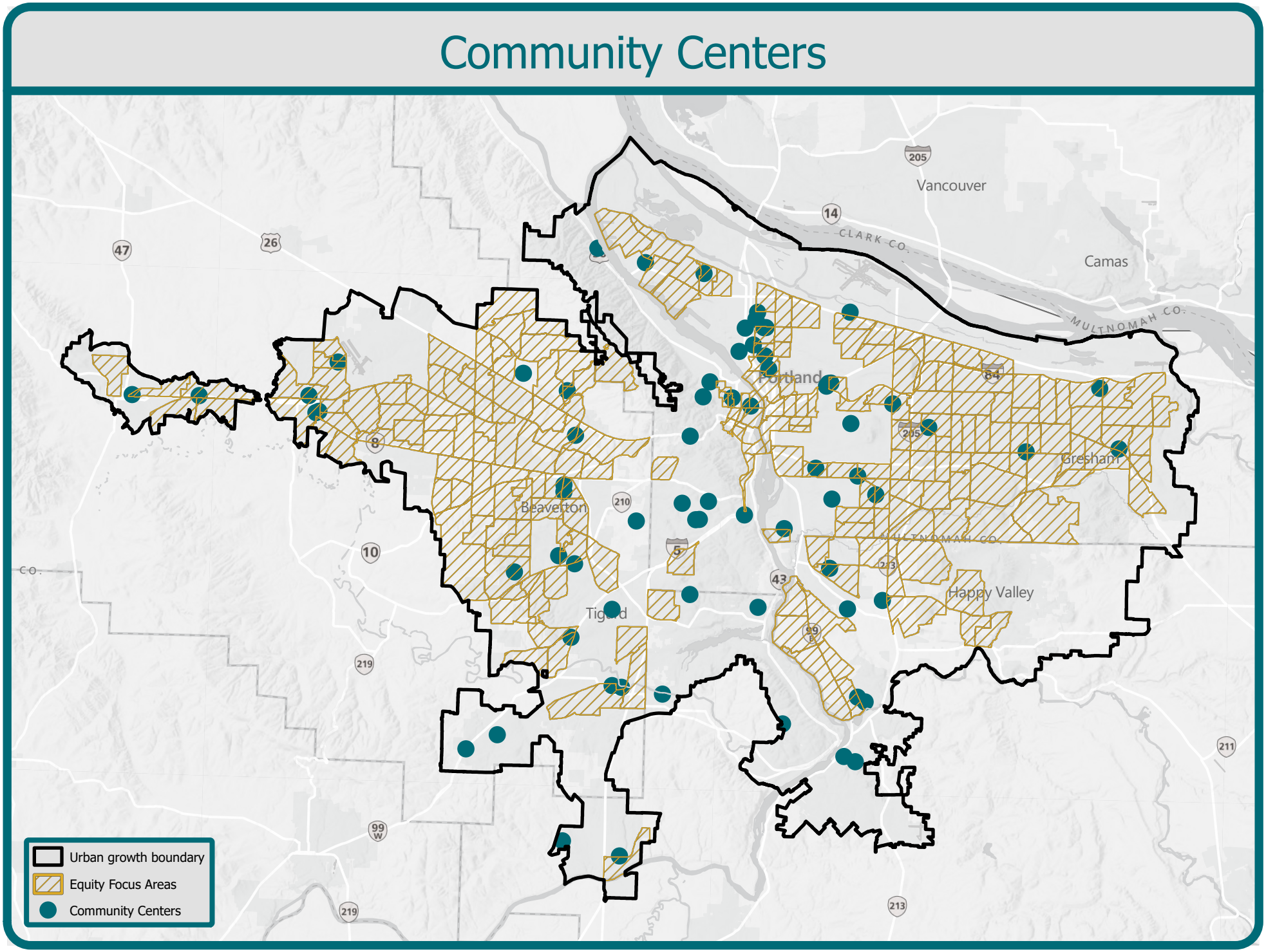
Flood Hazard Areas (FEMA)



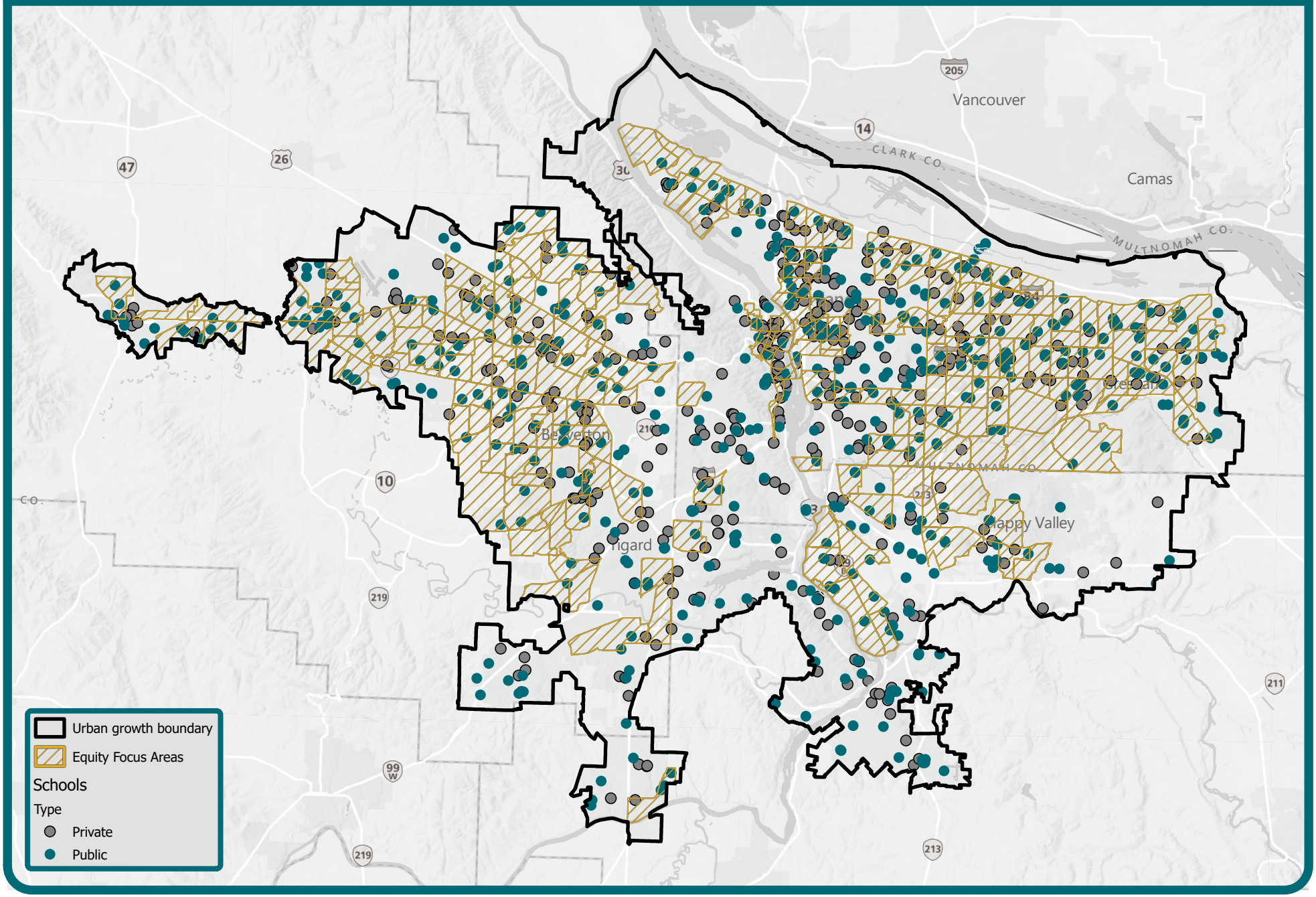
Libraries


Vancouver
Camas
Portland
Gresham
Beaverton
Tigard
Happy Valley
CLARK CO.
MULTNOMAH CO.
Urban growth boundary
Equity Focus Areas
Libraries

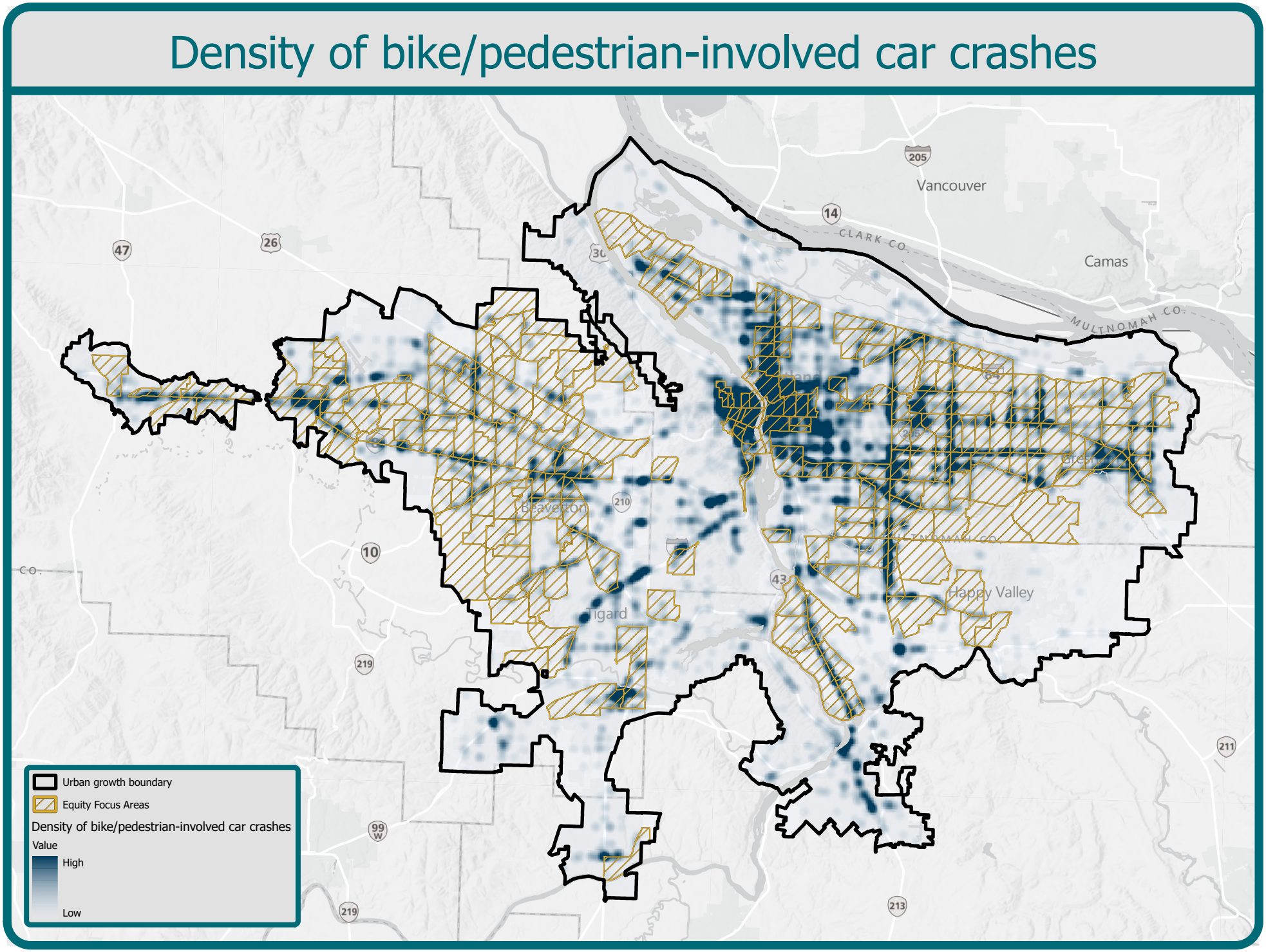
Community Centers



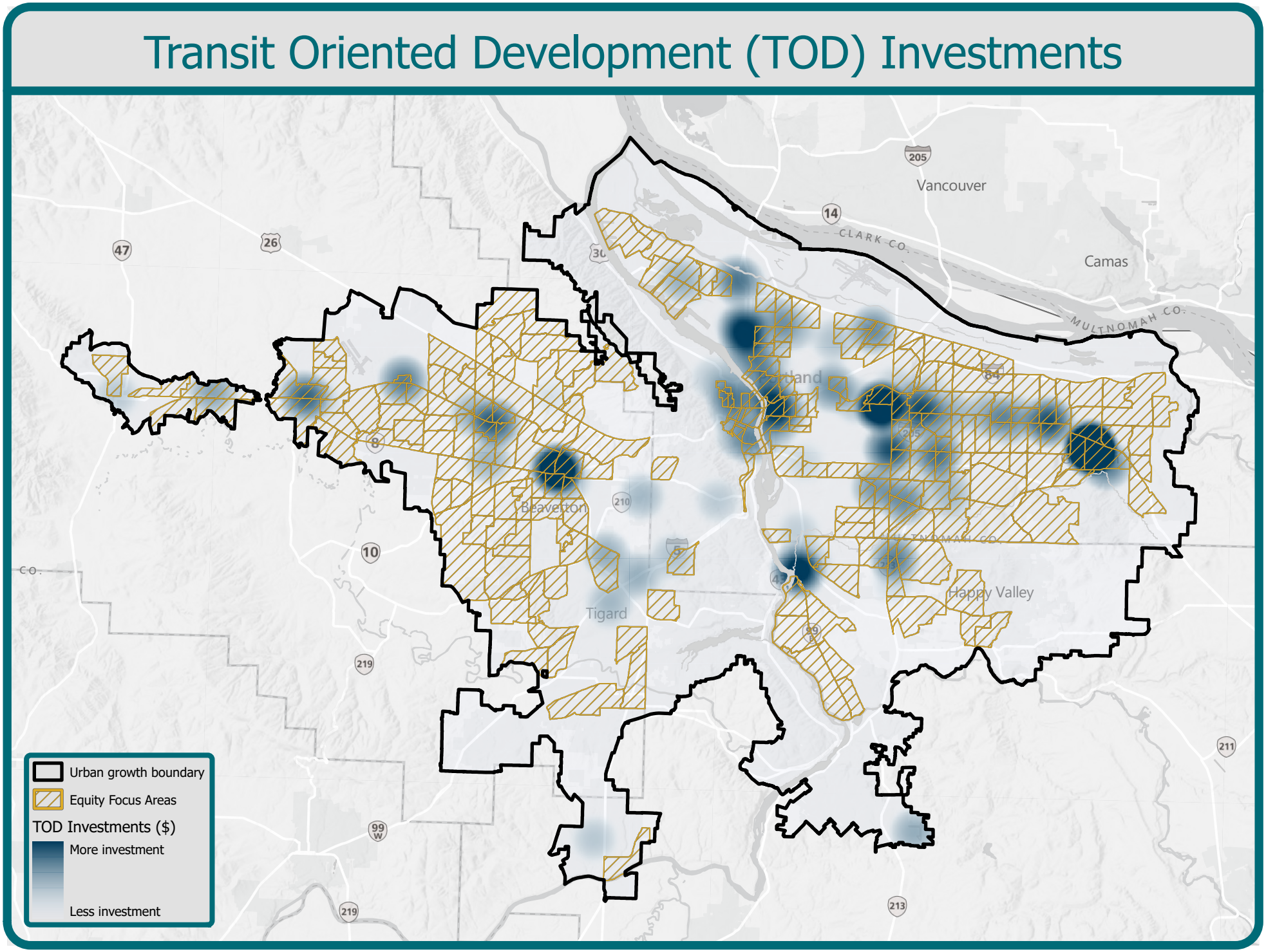
Schools


Vancouver
Camas
CLARK CO.
MULTNOMAH CO.
Beaverton
Tigard
Happy Valley
Urban growth boundary
Equity Focus Areas
Schools
Type
Private
Public

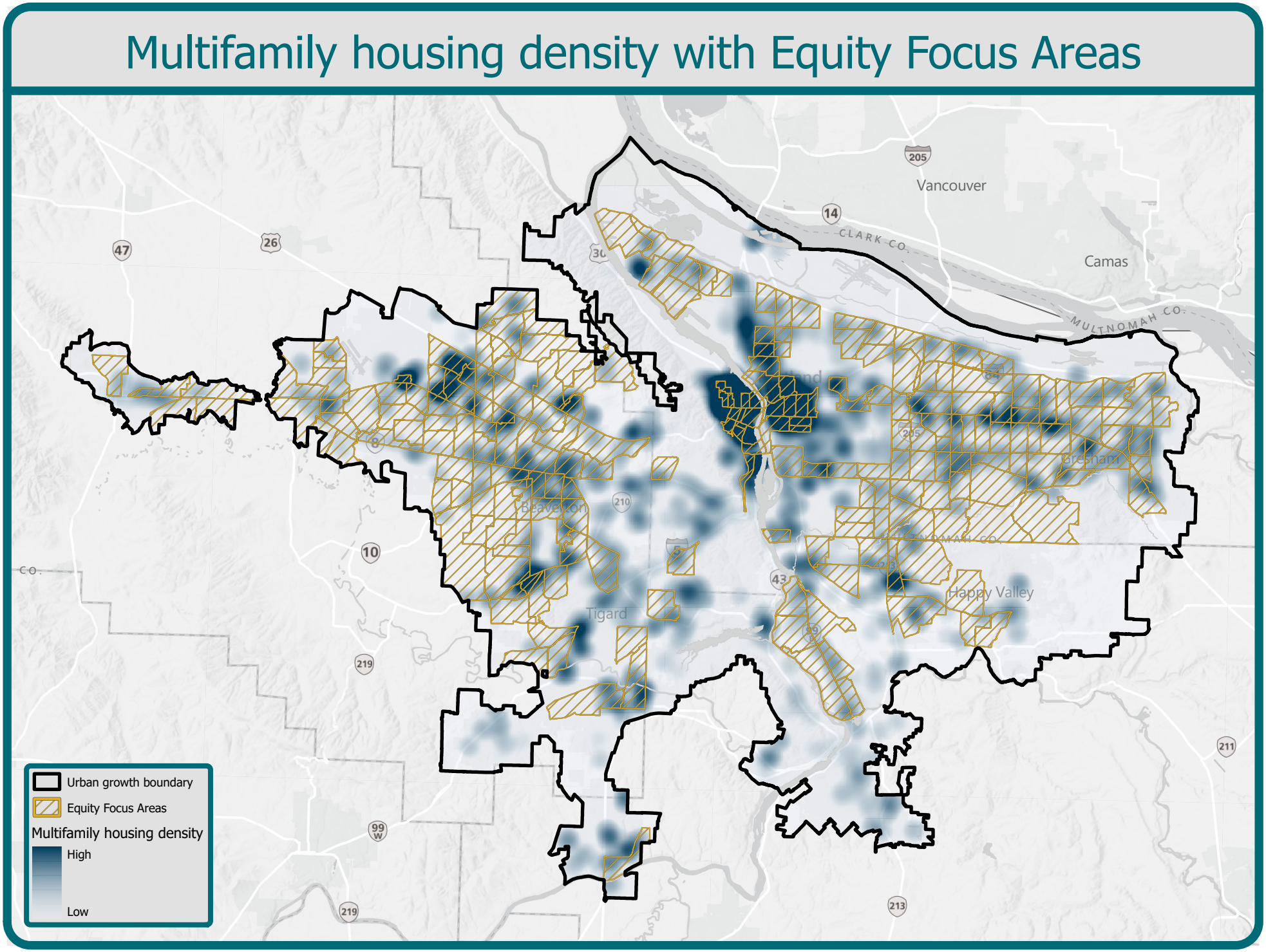
Density of bike/pedestrian-involved car crashes



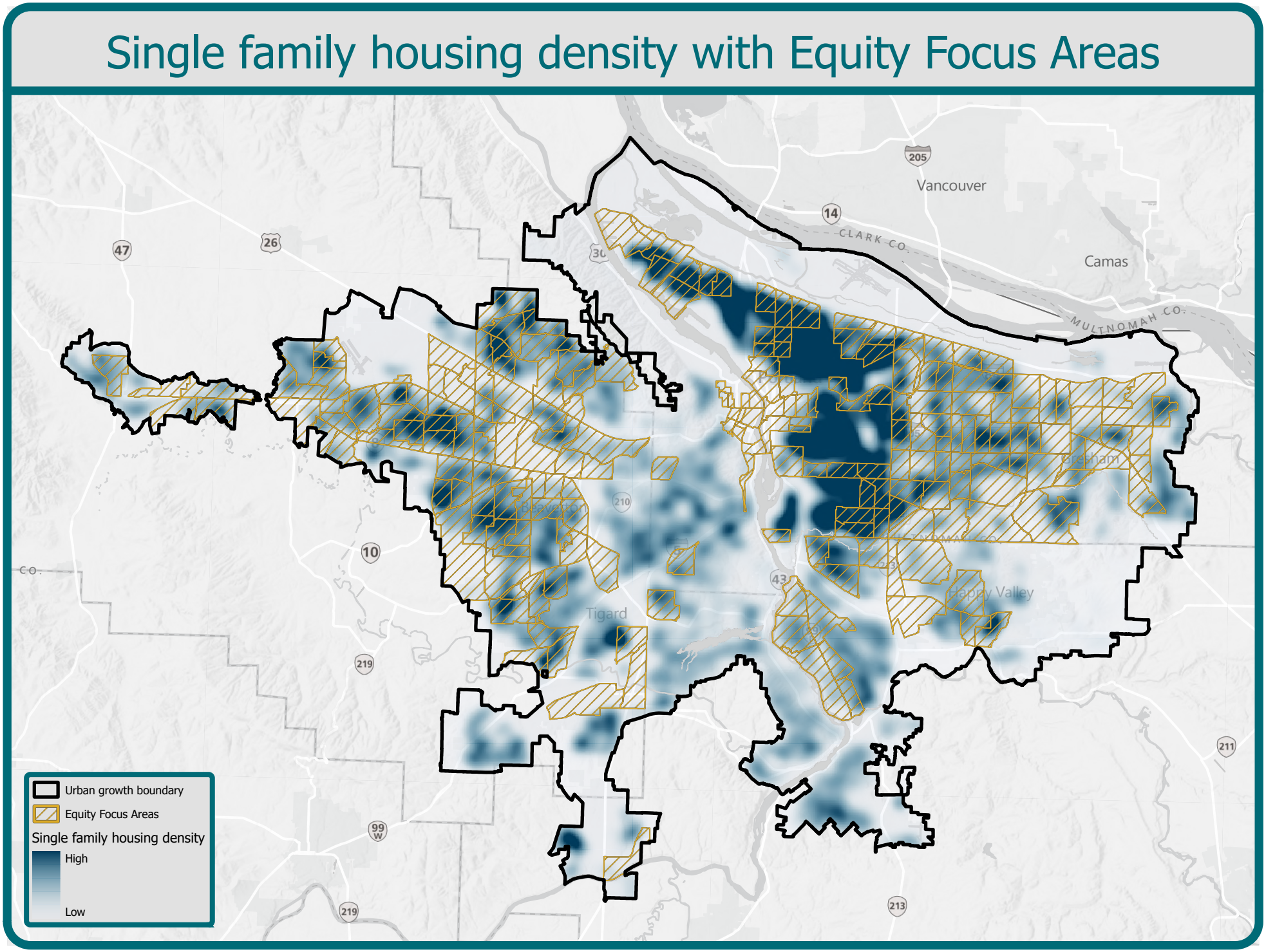
Transit Oriented Development (TOD) Investments



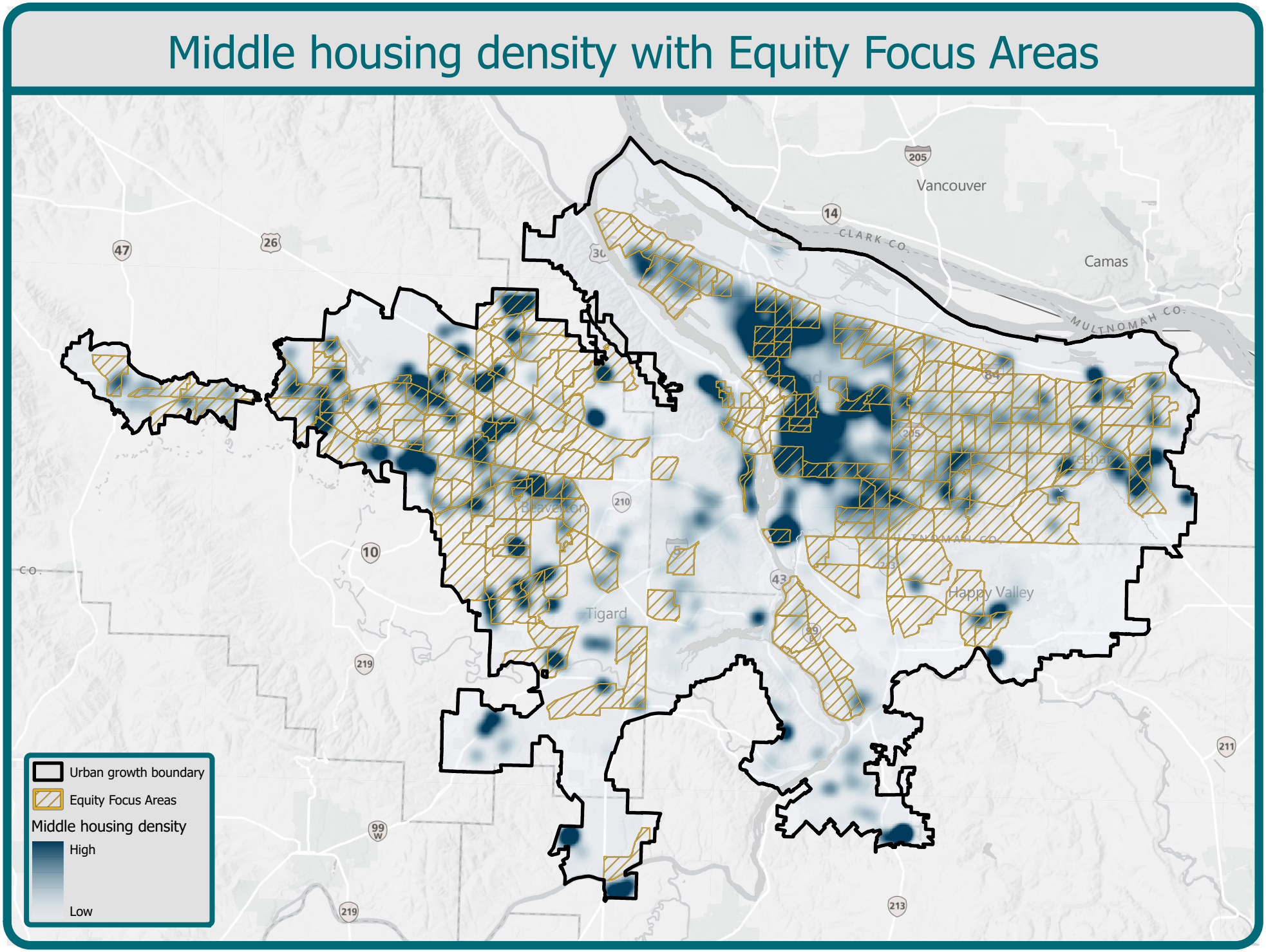
Multifamily housing density with Equity Focus Areas



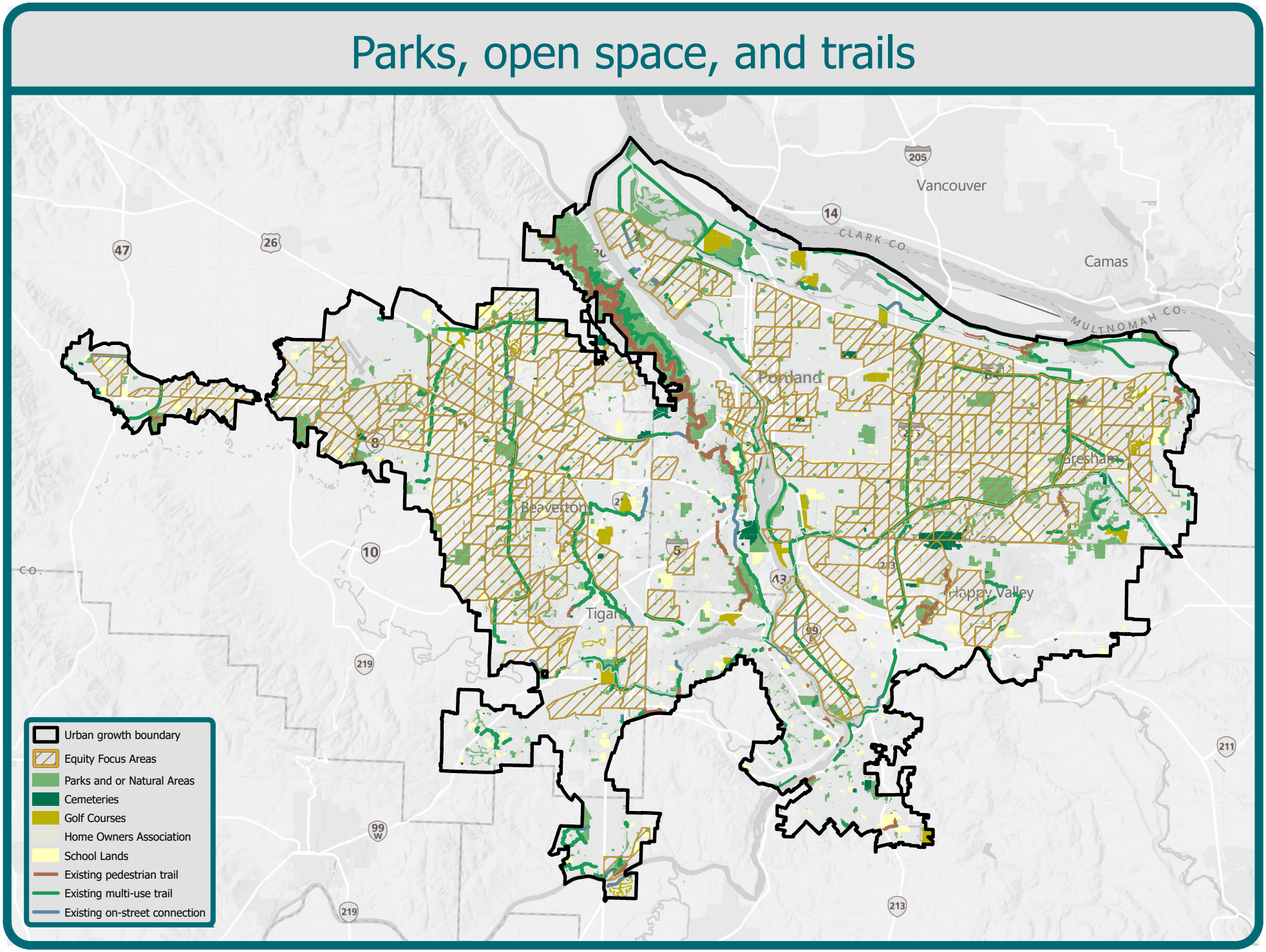
Single family housing density with Equity Focus Areas



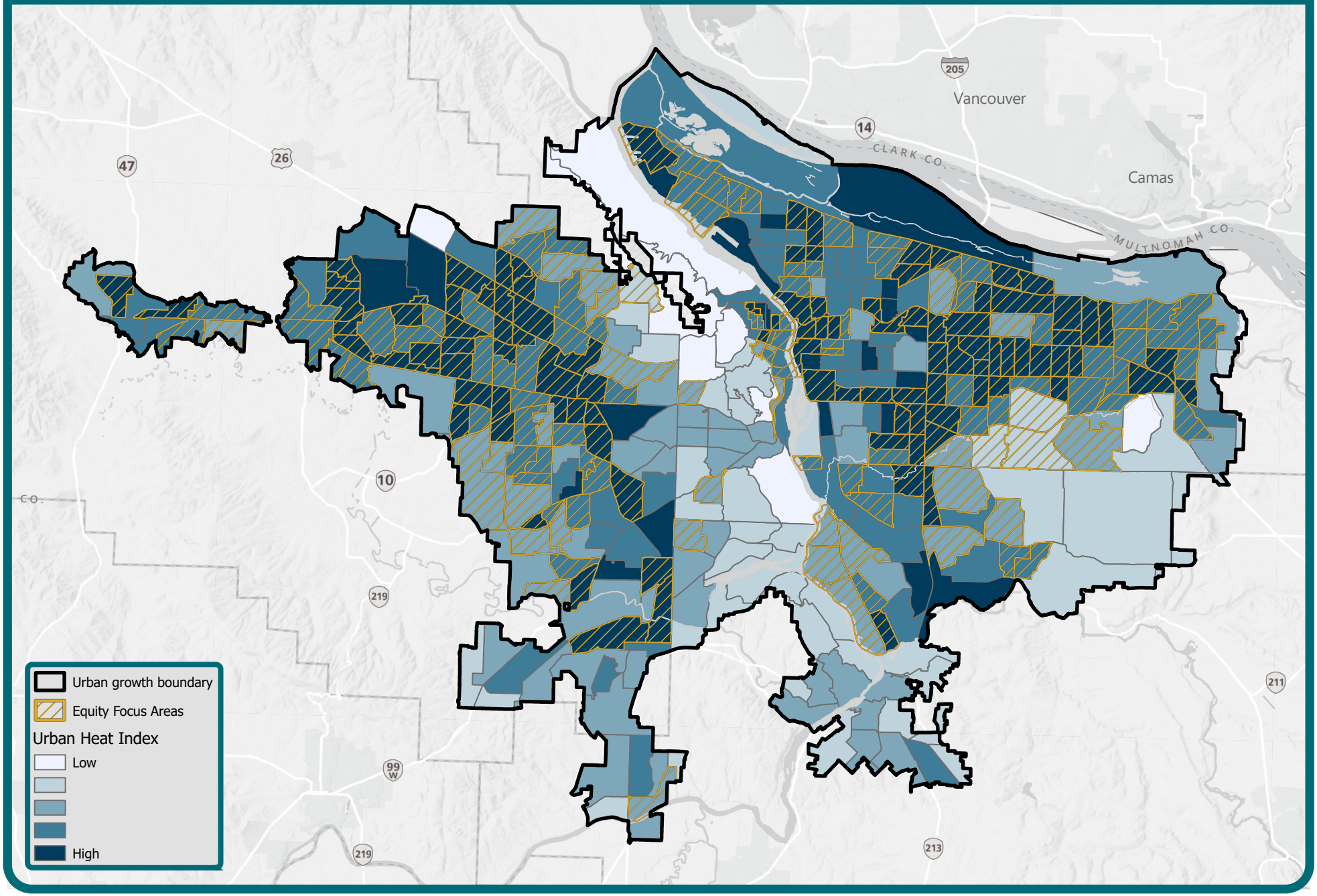
Middle housing density with Equity Focus Areas



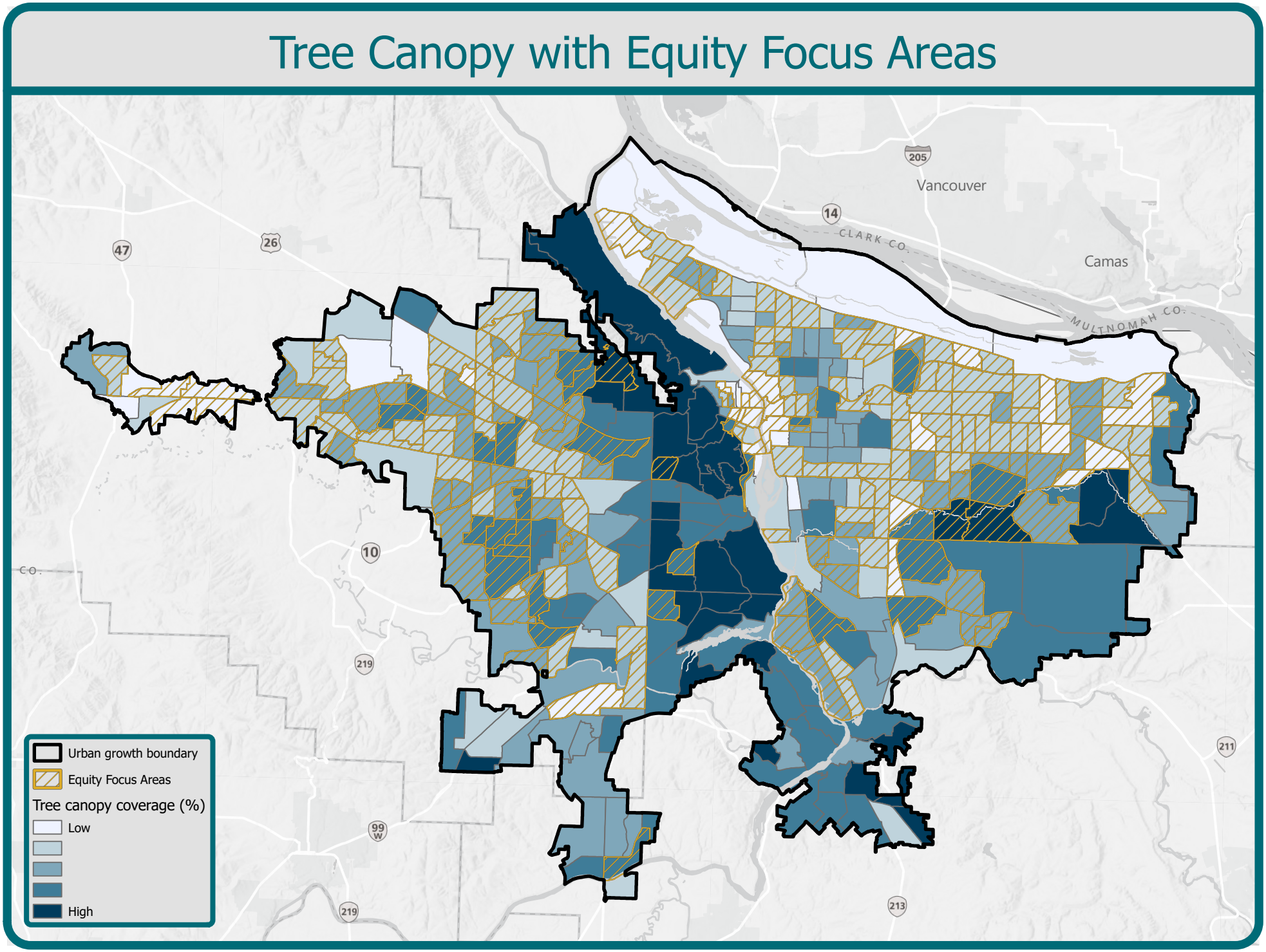
Parks, open space, and trails



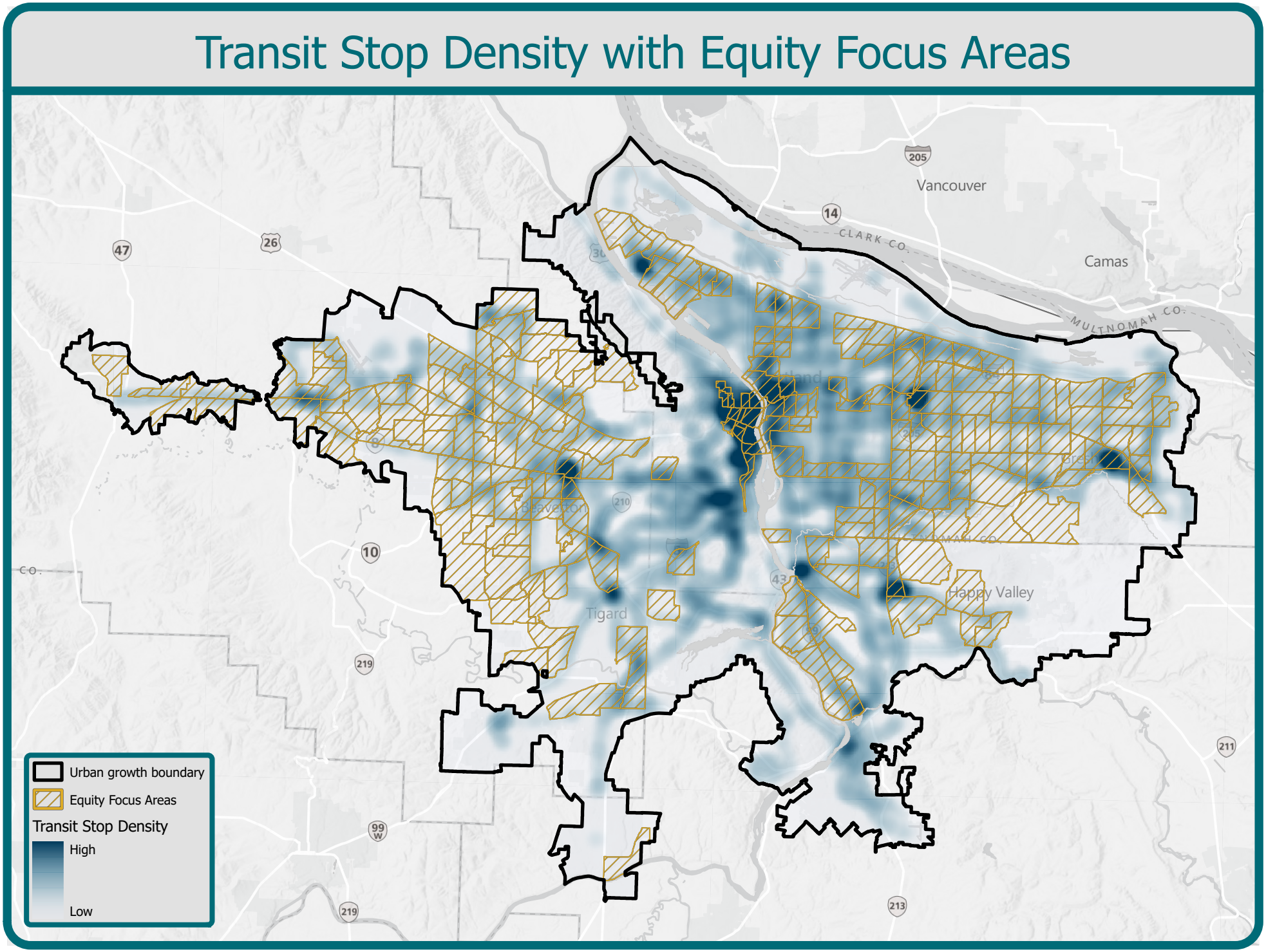
Urban Heat Index with Equity Focus Areas



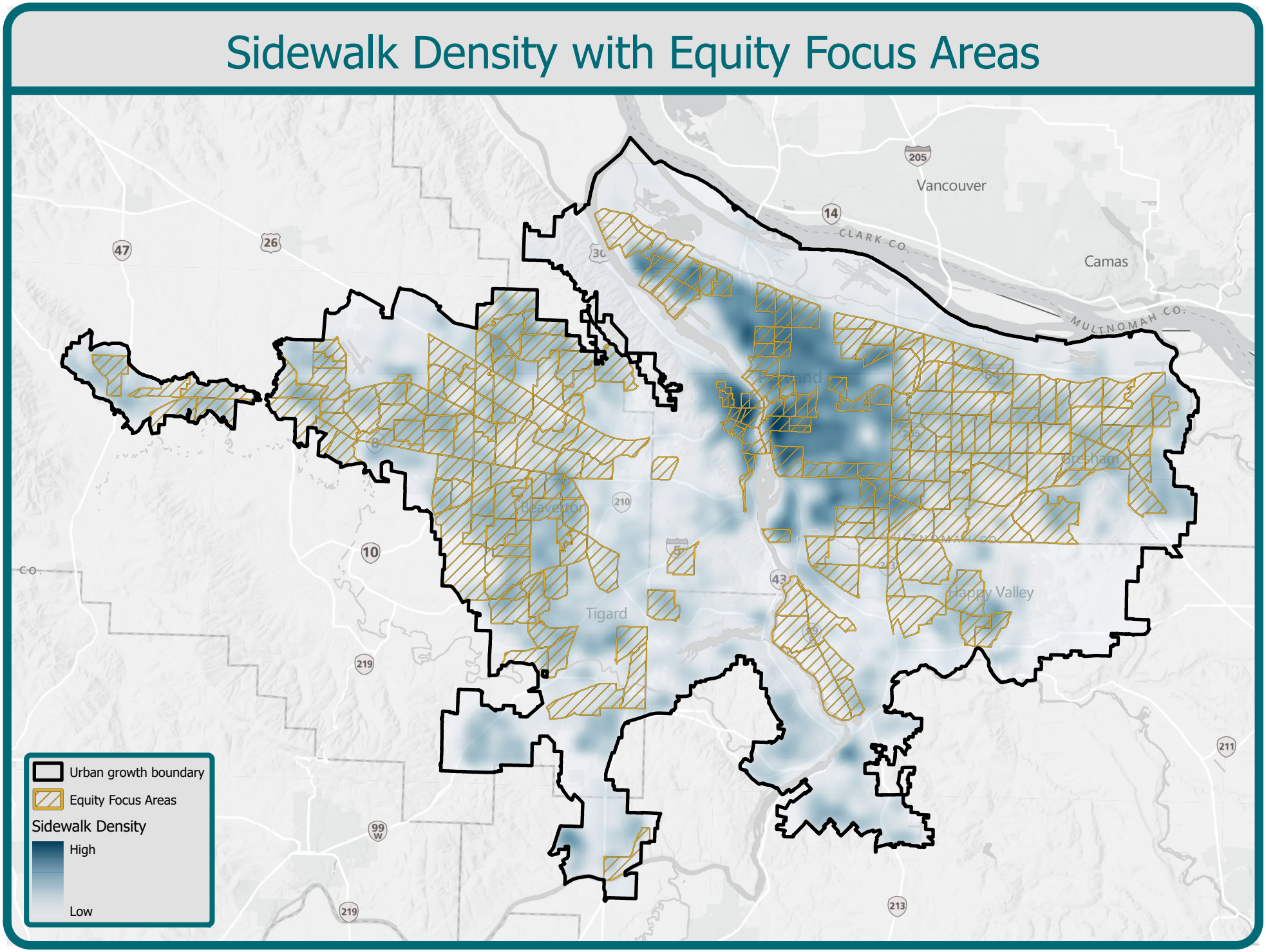
Tree Canopy with Equity Focus Areas



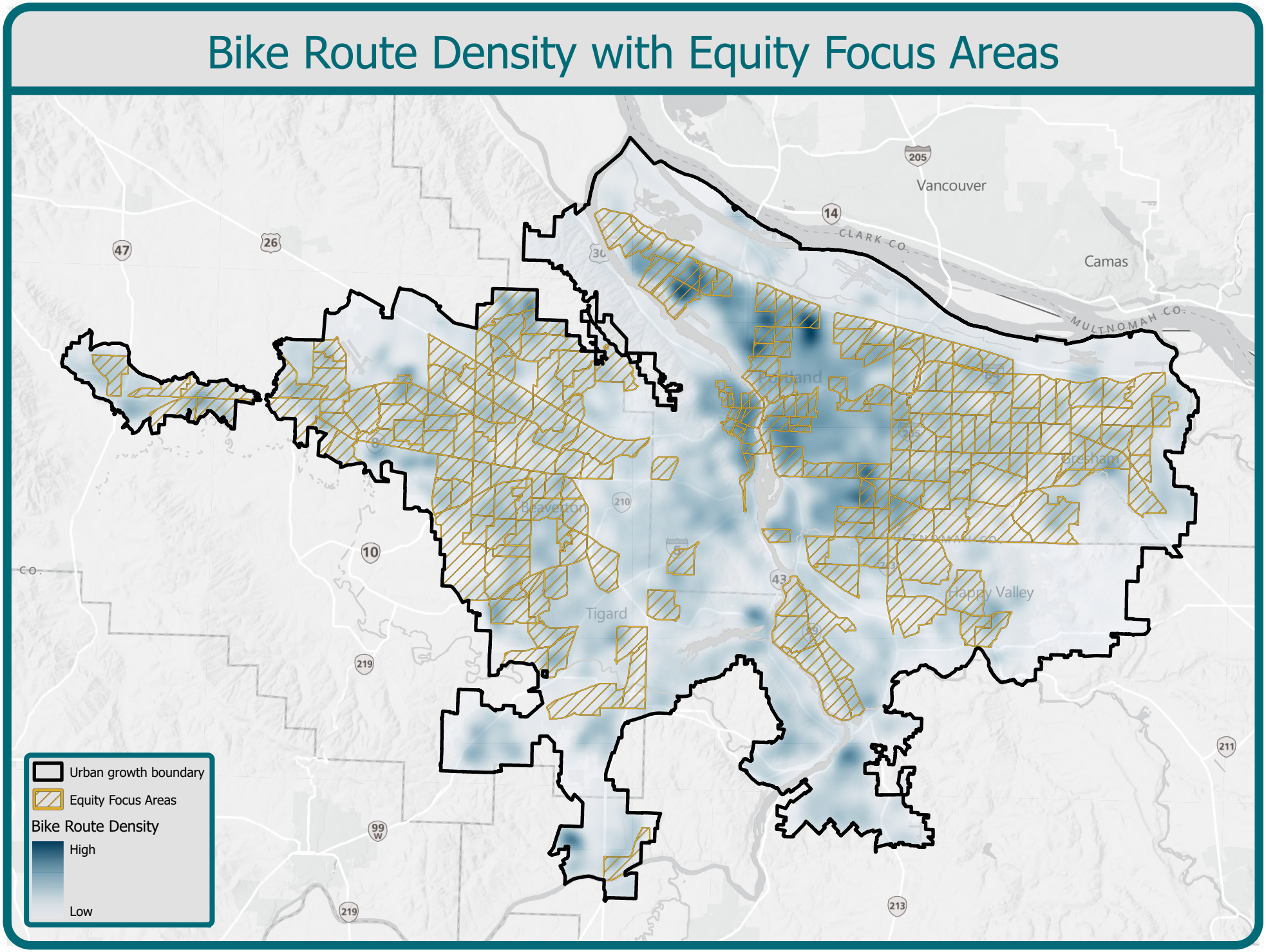
Transit Stop Density with Equity Focus Areas



Sidewalk Density with Equity Focus Areas



Bike Route Density with Equity Focus Areas



ECOnorthwest

DATE:	July 18, 2025
TO:	Ted Reid, Metro
FROM:	ECOnorthwest
SUBJECT:	Tasks 2B and 2C: Market Conditions and Barriers to Housing Development -

This memo examines the types of housing currently being produced in the Metro region, including both private and nonprofit development, across for-sale and rental markets. It explores the key drivers shaping these trends and also identifies major market and non-market barriers to meeting the region's housing needs. This analysis will ultimately be incorporated into Metro's Regional Housing Coordination Strategy (RHCS).

Structure:

- **Part I: Market Conditions Affecting Housing Development** – What types of housing are being built, where is that housing located, and who is it serving? How does current production align with Metro's projected housing needs?
- **Part II: Barriers to Housing Development** – What's getting in the way of delivering the housing the region needs?

Part I: Market Conditions Affecting Housing Development

Production Trends in the Private Market

The Metro region has added new housing in recent years, but market-rate production has slowed under mounting economic pressures. National and global shifts—many triggered by the COVID-19 pandemic—have disrupted local housing development. High interest rates, labor shortages, and rising construction costs have changed what types of housing get built, where it is built, and who can afford it.

What units have been built?

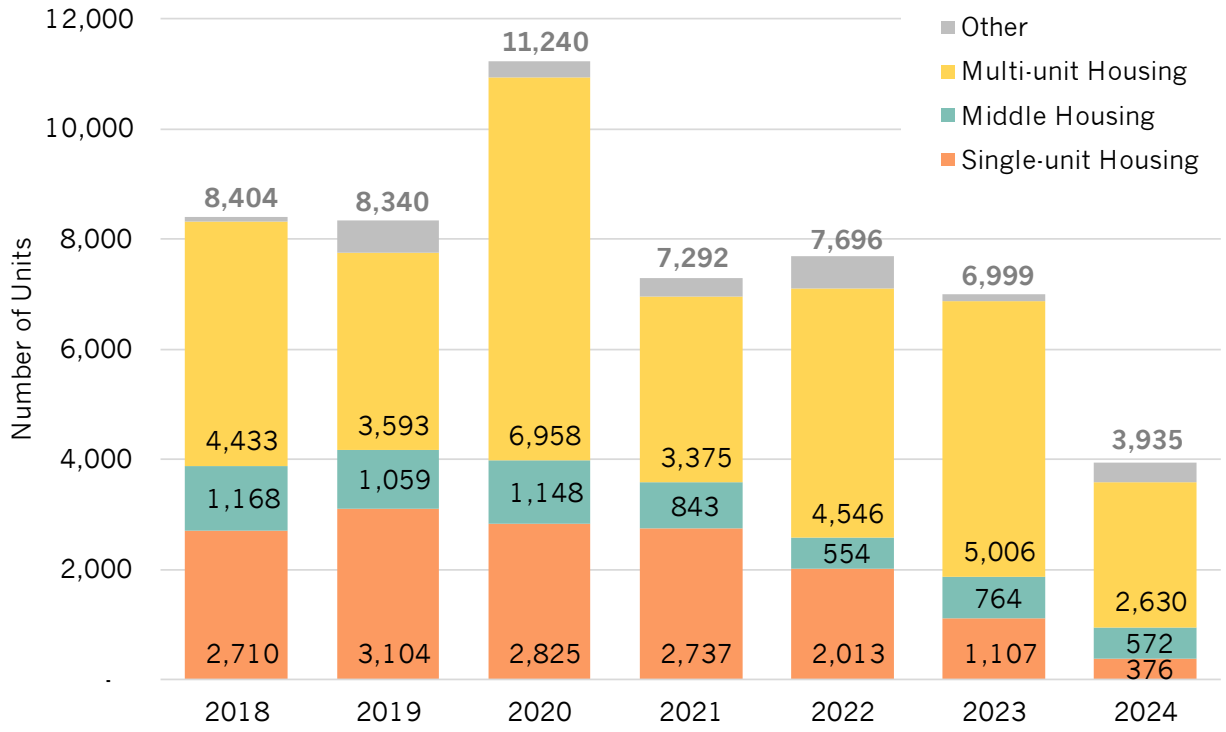
Within the Metro urban growth boundary (UGB), housing production averaged about 8,000 units per year from 2018 to 2023. In 2024, that figure dropped by roughly half, with declines observed across all housing types. The biggest decreases relative to recent trends are in single-unit housing, though multi-unit housing also declined noticeably compared to the 2018-2023 average (Exhibit 1).

These trends are not unexpected. Supply chain disruptions and labor shortages that began during the pandemic were followed by sharp increases in construction costs and interest rates. Together, these conditions have made it more difficult to finance new housing

development. A 2024 national survey of real estate professionals ranked Portland near the bottom among large urban centers for market attractiveness. However, Portland-based developers expressed greater optimism than their national peers, suggesting that some local actors remain willing to build under the right conditions.[1]

Multi-unit development has been especially affected by these dynamics. These projects have longer development timelines than single-unit housing, which creates a lag between market conditions and actual unit deliveries. The recent decline in multi-unit permitting is an early signal of potential further declines to come: In 2024, the City of Portland issued permits for just 856 multi-unit apartments, down from an average of 3,100 units per year between 2018-2023 . As these lower permit volumes progress through the pipeline, an additional decline in multi-unit deliveries is expected. Middle housing deliveries have also slowed, although the decline has been less severe than for other product types. Similar lag effects may still appear in this segment of the market.

Exhibit 1: Units Built by Type, Metro Region, 2018-2024

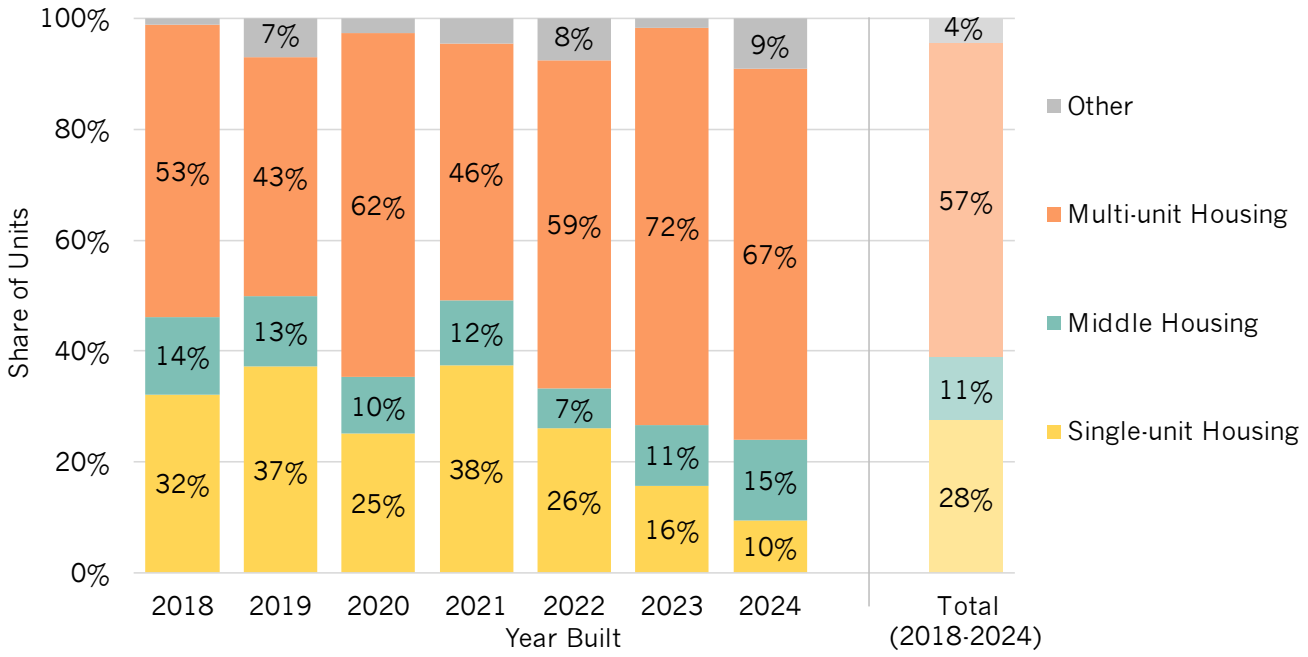


Source: Metro RLIS
Note: There is a lag between when units are delivered and when they appear in Metro RLIS data.
Note: Middle housing includes ADUs, plexes, townhomes, and cottage cluster housing. Other includes manufactured homes, dormitories, and retirement facilities.

[1] ULI Emerging Trends in Real Estate, 2025

As single-unit development slowed in 2023 and 2024, multi-unit development has made up a larger share of new housing deliveries. In 2024, multi-unit development accounted for 67 percent of newly delivered units, up from 53 percent in 2018 (Exhibit 2). This shift reflects current market conditions but could change in the coming years as the effects of recent permitting declines continue to work their way through the pipeline.

Exhibit 2: Distribution of Units Built by Type, Metro Region, 2018-2024

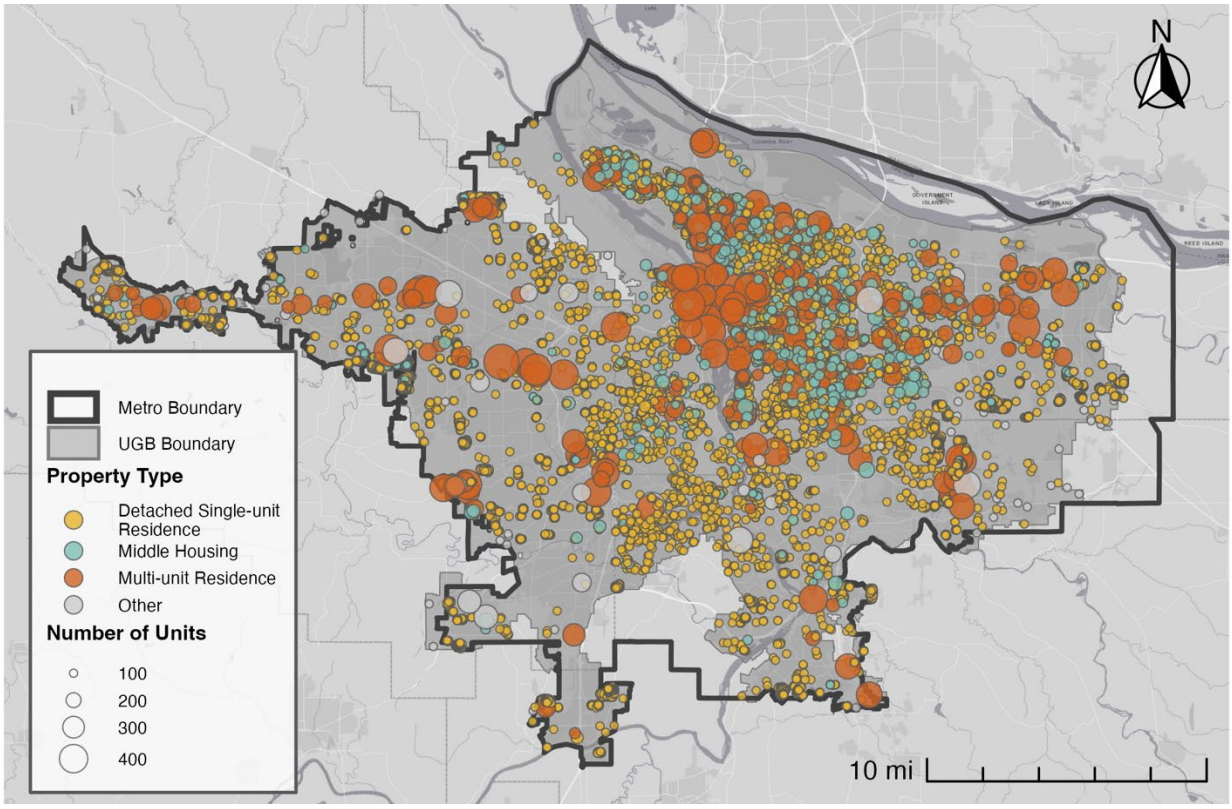


Source: Metro RLIS
Note: There is a lag between when units are delivered and when they appear in Metro RLIS data.
Note: Middle housing includes ADUs, plexes, townhomes, and cottage cluster housing. Other includes manufactured homes, dormitories, and retirement facilities.

Where have new units been built?

Since 2018, new residential development has been concentrated in specific areas of the Metro region (Exhibit 3). North and Northeast Portland have seen the highest number of new units delivered across all housing types. Multi-unit construction has been especially concentrated in the Pearl District and along the Williams, Interstate, and Mississippi corridors. Single-unit development has been more broadly distributed throughout the urban growth boundary. Middle housing activity is also focused in North and Northeast Portland.

Exhibit 3. Geographical Distribution of Residential Developments, Built 2018-2024



Source: Metro RLIS

Note: Middle housing includes ADUs, plexes, townhomes, and cottage cluster housing. Other includes manufactured homes, dormitories, and retirement facilities.

Who are new rental units affordable to?

An analysis of rents in new market-rate apartments shows affordability at a range of income levels depending on unit size (Exhibit 4). Newly delivered studios and one-bedroom units are generally affordable to households earning between 60 and 100 percent of area median income (AMI).[2] As of 2025, the AMI for the Portland MSA was $124,100 for a four-person household.

For context:

- A cashier earns an average of $38,000 annually
- An elementary school teacher earns an average of $87,000 annually
- An electrical engineer earns an average of $120,000 annually

Most studios are affordable to households earning 60 to 80 percent of AMI, while one-bedroom units, the most common type delivered in recent years, are most commonly affordable to households earning 80 to 100 percent of AMI. New two- and three-bedroom units are rarely affordable to households earning below 100 percent of AMI, even after accounting for the higher incomes typically associated with larger household sizes.

These patterns suggest that new market-rate development is meeting the needs of a range of income levels and household sizes but is not meeting the needs of the lowest-income renters or larger households.

METHODOLOGY: RENTAL AFFORDABILITY ANALYSIS

This analysis uses CoStar data, which reflects asking rents for units listed for rent (not rents paid by existing tenants, which may be lower). The dataset is strongest for larger market-rate multi-unit properties. Data used for this analysis excludes regulated affordable housing (as identified by CoStar) and age-restricted senior housing. Affordability was assessed using:

- Average effective rents (including temporary discounts) by unit type for each property (individual unit rents may vary)
- 2025 Area Median Income (AMI) for the Portland MSA ($124,100 for a four-person household), with adjustments for smaller units based on smaller household sizes using U.S. Department of Housing and Urban Development (HUD) methodology
- Estimated utility allowances, based on Portland Housing Bureau schedules

A unit is considered affordable if housing costs do not exceed 30 percent of a household's income, per HUD standards.

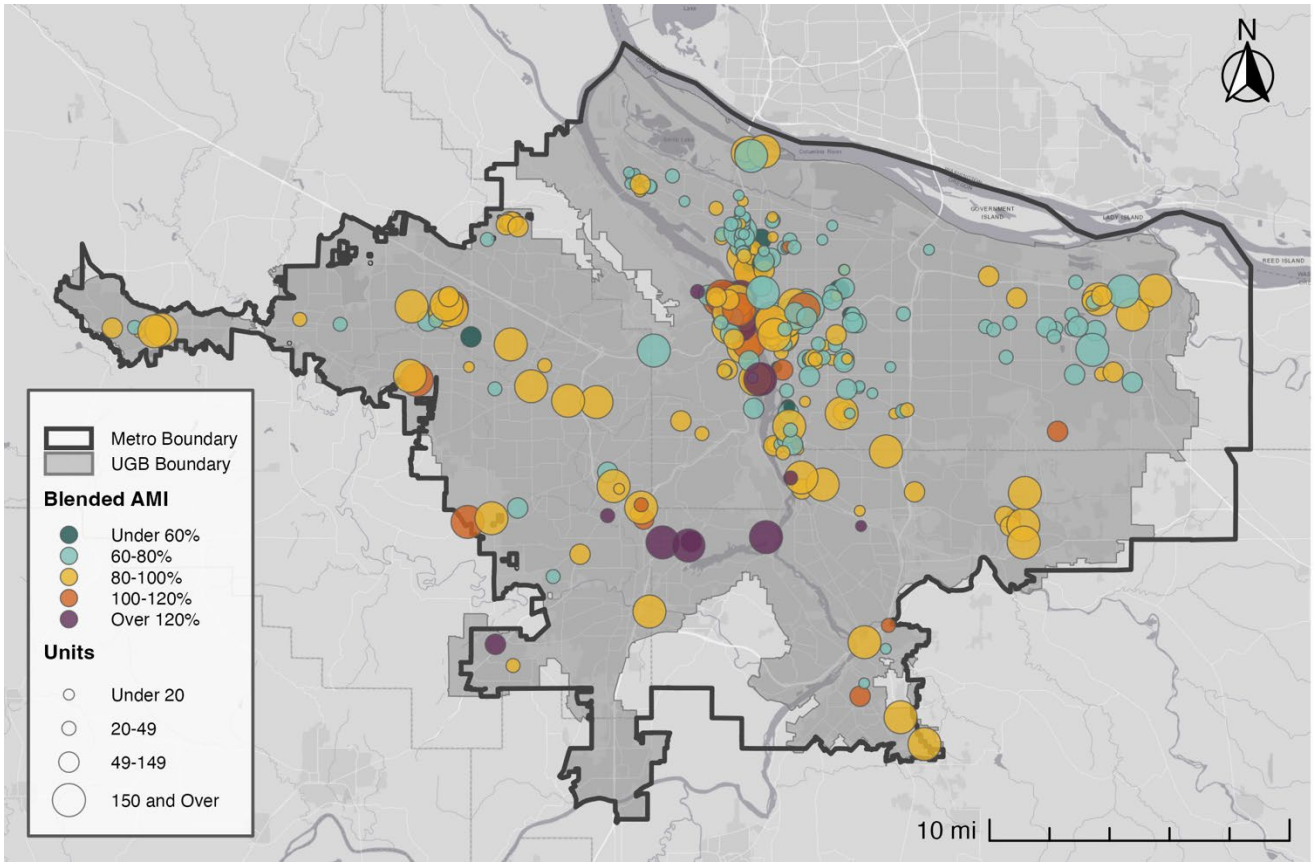
[2] Affordability calculations are adjusted based on unit size to account for different household sizes served by different unit sizes.

Exhibit 4. Multi-unit Affordability of Market Rate Units Built 2018 to Q1 2025, Metro Region

Source: ECOnorthwest, Costar 2025, U.S. Department of Housing and Urban Development Income Limits, Portland Housing Bureau 2025 Utility Allowance Schedule, accessed https://www.portland.gov/phb/documents/2025-utility-allowance-schedule/download.

Affordability patterns also vary by geography (Exhibit 5). Development in Portland's Central City and close-in neighborhoods spans a wide range of affordability levels. Development in suburban locations largely falls within the 80-100 percent AMI range (using a weighted average based on the unit mix and affordability of each size of unit), with some more affordable development in the eastern part of the region and some less affordable development in the southwestern part of the region.

Exhibit 5. Market Rate Multi-unit Development, Built 2018 to Q1 2025



Source: ECOnorthwest. CoStar 2025. U.S. Department of Housing and Urban Development Income Limits.
Note: Blended AMI is calculated based on a weighted average of the affordability levels for each unit size (using CoStar average rents by unit size) and the share of units at each size in a property.

Who are new ownership units affordable to?

Newly built for-sale housing in the Metro region is largely unaffordable to low- and middle-income households. Nearly all (99 percent) of single unit detached homes built and sold since 2022 are affordable only to households earning more than 120 percent of AMI (Exhibit 6).

Townhomes show a similar pattern, with most units priced beyond the reach of moderate-income buyers. Condos and co-ops offer slightly more affordability, with a greater share accessible to households earning between 100 and 120 percent of AMI. However, they represent a small portion of the ownership market, with about 1,000 units sold.

METHODOLOGY: OWNERSHIP AFFORDABILITY ANALYSIS

This analysis uses Redfin data on newly built homes sold since 2022. Affordability is based on estimated monthly housing costs in the year each home was sold, using the following inputs:

- 2022–2025 AMI thresholds from Portland Housing Bureau
- Typical costs: mortgage, property taxes, insurance, HOA fees, and utilities
- Mortgage calculations assume 30-year fixed-rate loans and year-specific interest rates (using Freddie Mac data)
- 20 percent down payment

A home is considered affordable if total housing costs do not exceed 30 percent of household income, consistent with HUD standards.

Note: Redfin's classification of condos and townhomes can be inconsistent; actual HOA fees may vary by project.

Exhibit 6. Units Sold by Housing Type and Affordability, Built and Sold 2022 to Q1 2025, Metro Region

Source: ECOnorthwest. Redfin 2025. U.S. Department of Housing and Urban Development Income Limits. Portland Housing Bureau 2022-2025 Utility Allowance Schedule. Portland Housing Bureau 2022-25

Income and Rent Limits. Freddie Mac, 30-Year Fixed Rate Mortgage Average interest rate in the US.
Note: Classification of townhouses and condos can be unreliable in Redfin data.

Affordability also varies by unit size. Most single-unit homes sold were three- and four-bedroom units. Townhomes were primarily three-bedroom, while condos were predominantly two-bedroom. These patterns suggest that different ownership types are serving different household types. However, few ownership units at any size and of any type are affordable to households earning below 100 percent of AMI (Exhibit 7).

Exhibit 7. Units Sold by Bedroom Count and Affordability, Built and Sold 2022 to Q1 2025, Metro Region

Source: ECOnorthwest. Redfin 2025. U.S. Department of Housing and Urban Development Income Limits. Portland Housing Bureau 2022-2025 Utility Allowance Schedule. Portland Housing Bureau 2022-25 Income and Rent Limits. Freddie Mac, 30-Year Fixed Rate Mortgage Average in the United States.
Note: Classification of townhouses and condos can be unreliable in Redfin data.

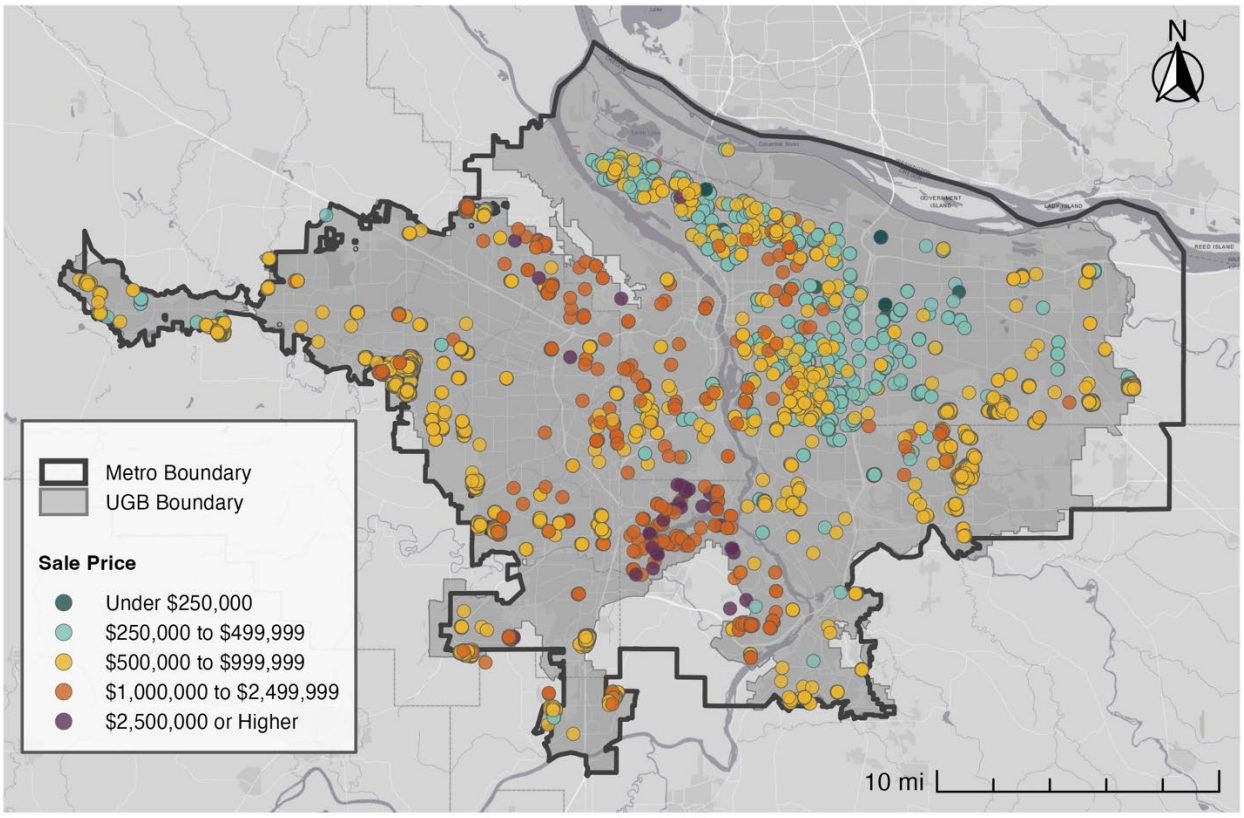
Where are new ownership units being built and sold?

New for-sale housing is unevenly distributed across the Metro region. The highest-priced homes are concentrated in Lake Oswego and along the Forest Park corridor (Exhibit 8). In contrast, lower-priced homes are more common near I-205 and in parts of North Portland.

Across the region, most new for-sale units built and sold outside Portland are single-unit homes (Exhibit 9). Condos and townhomes are more frequently developed within the city of Portland. New construction activity is especially concentrated in Southeast Portland and in North Portland neighborhoods such as Woodlawn, Kenton, and St. Johns.

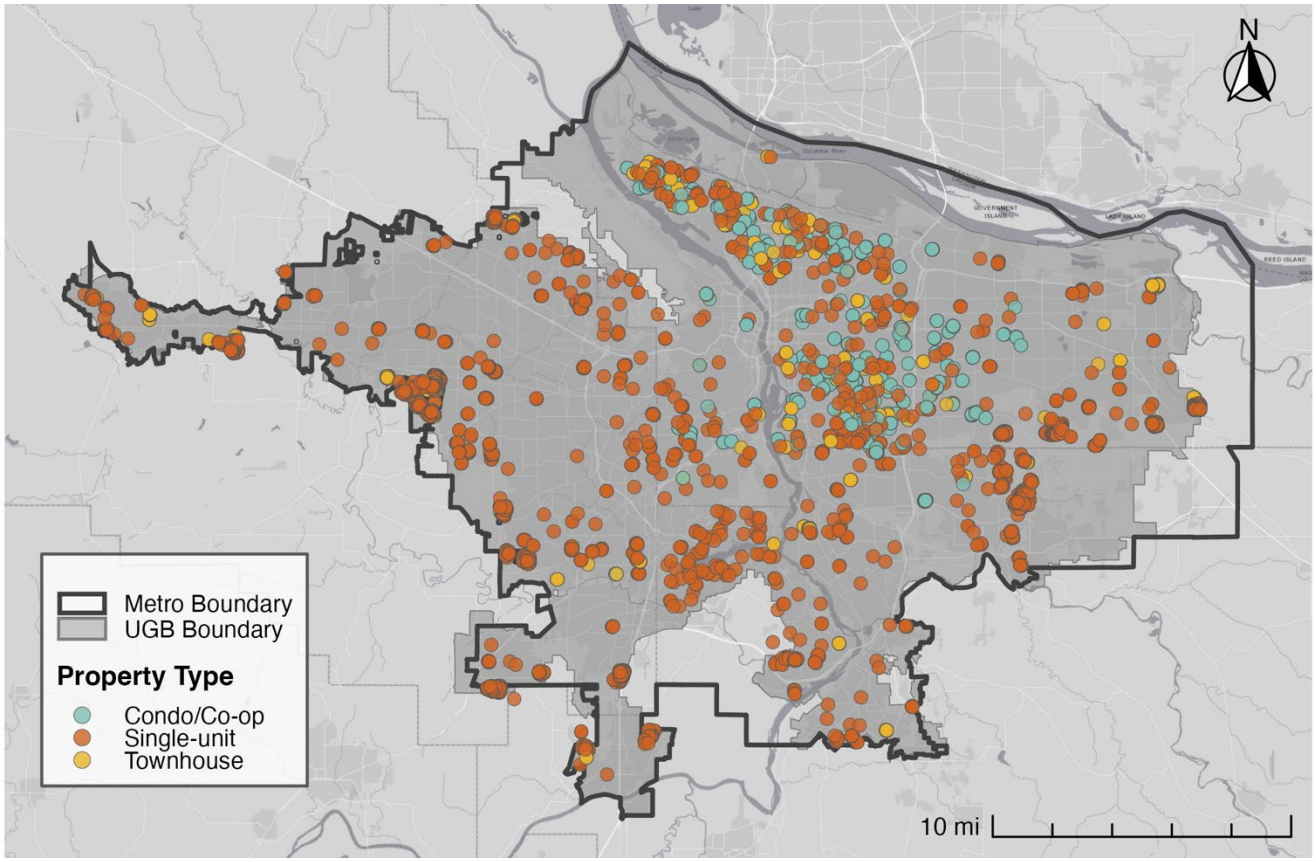
Because condo development is concentrated in Portland, the few ownership units affordable to households earning 100 to 120 percent of AMI are also located almost entirely within the city of Portland.

Exhibit 8. Geographic Distribution of Sales Price, Units Built and Sold 2022 to Q1 2025



Source: Redfin

Exhibit 9. Geographic Distribution of Property Type, Units Built and Sold 2022 to Q1 2025



Source: Redfin.
Note: Classification of Townhouses and Condo can be unreliable in Redfin data.

Nonprofit and Affordable Sector Production

Production trends in the nonprofit and affordable housing sector reflect some of the same challenges facing the private market, including escalating construction costs, labor shortages, and permitting delays. However, the scale, timing, and location of affordable housing development are driven less by developer sentiment and more by the availability and structure of public financial support. Key sources of public support include local, state, and federal funding programs such as the Metro Housing Bond, Low-Income Housing Tax Credits (LIHTC), and gap financing from housing bureaus and state agencies.

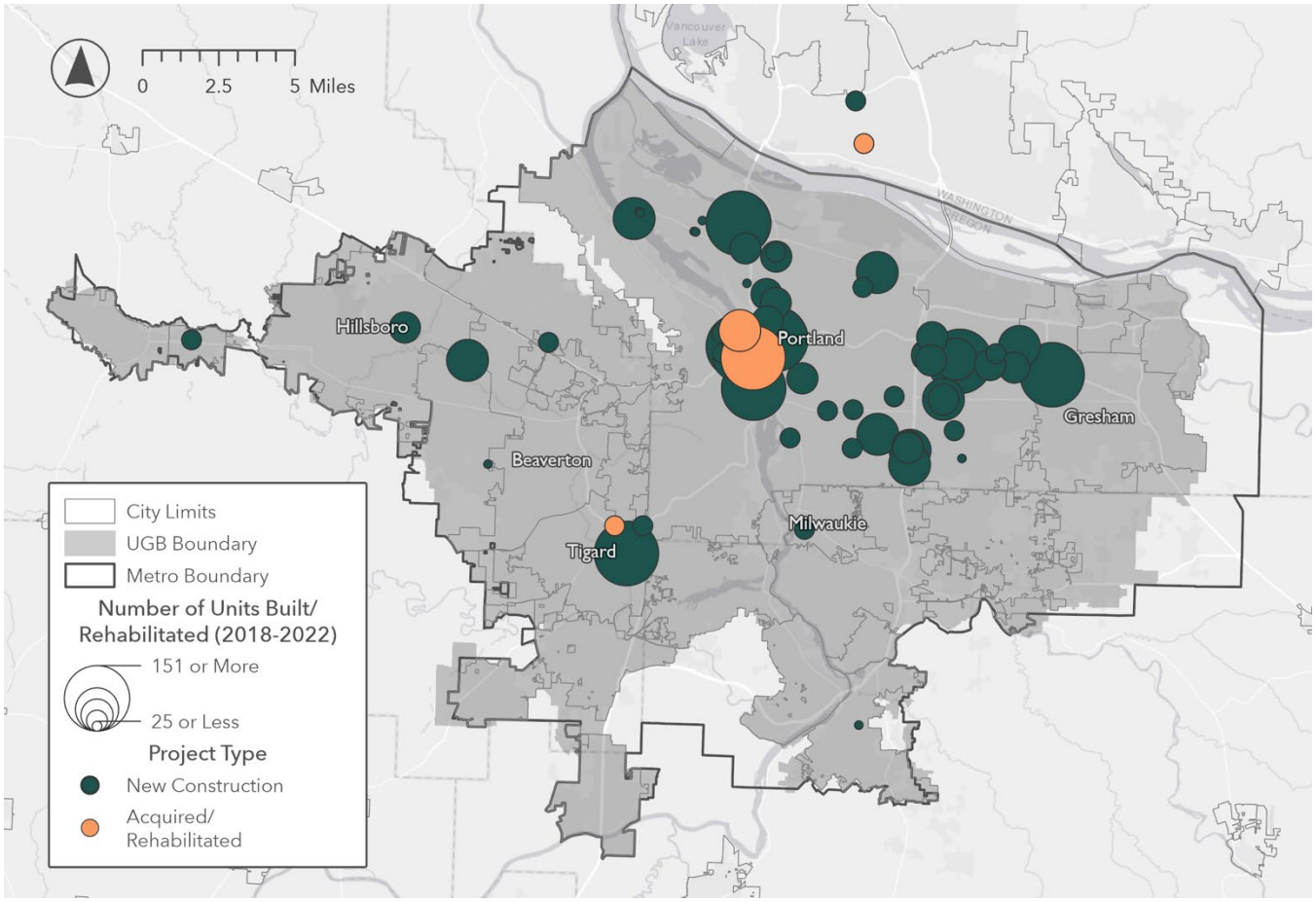
Exhibit 10 shows the number of affordable housing units that were either newly constructed or rehabilitated between 2018 and 2022. Over this period, the region added 5,660 new or rehabilitated units. New construction activity declined from 2018 to 2020 but remained relatively steady between 2020 and 2022.

Exhibit 10. New and Rehabilitated Affordable Housing Units in the Metro Region, 2018-2022

Source: Metro Affordable Housing Inventory (revised by ECOnorthwest in 2023).
Note: The most recent data update occurred in mid-2023. Data from 2023 was excluded from this chart to avoid presenting an incomplete or potentially misleading picture of annual development activity.

The spatial distribution of these units is shown in Exhibit 11. Unit delivery was most concentrated in inner Portland, both west and east of the Willamette River, with a secondary cluster east of 82nd Avenue in outer east Portland and several developments in Tigard. These locations reflect where land is available, where subsidies can be layered effectively, and where jurisdictional partners are actively supporting development.

Exhibit 11. Distribution of New and Rehabilitated Affordable Housing Units in the Metro Region, 2018-2022



Source: Metro Affordable Housing Inventory (revised by ECOnorthwest in 2023).

DATA LIMITATIONS: AFFORDABLE HOUSING INVENTORY

One limitation of this analysis is the lack of a regularly updated affordable housing dataset. The most recent official Metro update to the Affordable Housing Inventory was in 2022. ECOnorthwest revised the data in 2023 by incorporating records from the Oregon's Affordable Rental Housing program and Portland Housing Bureau, but this update was completed mid-year and may not fully reflect 2023 activity.

An alternative dataset, the Oregon Affordable Housing Inventory (OAHI), includes fields such as units by AMI and bedroom counts that would support deeper analysis. However, the most recent readily available version is from 2022.

Gaps Between Market Output and Regional Needs

Despite recent housing production in the Portland region, a clear and persistent mismatch exists between what the market — both private and nonprofit — has been delivering and what regional demographics and affordability benchmarks suggest is needed.

What has the market delivered?

As outlined in Part I of this memo, the private market has primarily delivered:

- Rental housing affordable mostly to households earning above 80 percent of AMI, with limited lower-cost options in studios and one-bedroom formats
- For-sale housing affordable almost exclusively to households earning over 120 percent of AMI, with limited delivery of units affordable to moderate-income buyers, usually in the form of condos.

While new market-rate rental housing has provided some modest affordability for smaller households, larger units, such as two- and three-bedroom apartments, remain unaffordable to most households below 100 percent of AMI.

On the regulated side, affordable housing development since 2018 has expanded supply, but production remains well below what's needed to meet the growing demand from low-income and cost-burdened households.

Together, these production patterns reveal a system that is delivering a limited range of options (almost exclusively rental units, generally smaller units) for moderate-income households and wider range of options (rental and ownership) for higher-income households.

WHERE HOUSING IS AND ISN'T BEING BUILT

Recent housing production has been concentrated in select corridors, particularly the Pearl District and North and Northeast Portland, where infrastructure and zoning support multi-unit development. Inner Portland — both west and east of the Willamette River — and areas east of 82nd Avenue have seen substantial development of subsidized affordable housing.

In contrast, many high-opportunity areas — including parts of Southwest suburbs outside the Portland core and neighborhoods in Northwest Portland — have seen little new housing affordable to low- or moderate-income households. Barriers in these areas include limited land availability, high land costs, and infrastructure constraints.

Why this matters: Without changes in land use policy and funding priorities lower-income households will continue to be excluded from high-opportunity neighborhoods. This reinforces patterns of racial and economic segregation and limits Metro's ability to meet regional equity goals.

What does the region need?

Metro's 2024 Urban Growth Report estimates that the region will need approximately 178,000 new housing units within the Metro UGB from 2024 to 2044. This includes:

- 59,200 single-unit detached homes (33 percent)
- 37,100 middle housing units (21 percent)
- 81,700 multi-unit apartments (46 percent)

This mix reflects both projected household growth and the need to correct existing housing deficits. But housing need is not only about quantity; it is also shaped by who lives in the region and what kinds of housing they require. This mix is intended to reflect demographic and economic shifts such as shrinking household size, aging populations, and slower income growth.

INCOME-BASED NEED

The region's housing challenges are increasingly income-driven. More than 60 percent of new households projected between 2024 and 2044 will have incomes below $60,000. Among new renter households, that share rises to 85 percent. This points to strong and growing need for housing affordable to households earning less than 80 percent of AMI, especially those earning between 30 and 60 percent AMI.

Table 10 of the Urban Growth Report outlines current unmet housing needs by income group. These reflect the long-term underproduction of housing, especially affordable housing which has been a national trend since the 2007–2008 housing crisis. Underproduction is essentially the backlog of homes that ideally would have been built to keep up with household growth. This underproduction contributes directly to housing instability and homelessness, particularly among the lowest-income households.

Estimated current unmet housing need by income group includes:

- 0–30 percent AMI: 11,950 units (including those experiencing homelessness)
- 30–60 percent AMI: 6,000 units
- 60–80 percent AMI: 2,950 units
- 80–120 percent AMI: 2,200 units
- 120+ percent AMI: 700 units

These figures confirm that the largest affordability gaps exist at the lower end of the income spectrum, where the market is producing the fewest units, and where public subsidy is essential to meeting need.

AGE AND HOUSEHOLD COMPOSITION

Demographic change is a second major driver of housing need. By 2044, the Urban Growth Report projects that:

- With fewer people choosing to have children, the median householder age will increase. Households headed by someone over 65 years will constitute the greatest share – almost two-thirds – of the change in households.
- Most new households will be smaller. The average household size is projected to decline from 2.41 to 2.27 people.
- A growing share of households will be single-person or two-person households without children.

These shifts are already shaping the region's housing needs:

- Demand is increasing for small, accessible units that can accommodate aging households.
- Many of these households will rely on fixed or moderate incomes, increasing affordability pressures.
- The number of households with children will decline, though a significant share of Millennials aging into midlife will continue to require larger housing units.

DISABILITY AND ACCESSIBILITY

While the Urban Growth Report does not estimate the number of households with disabilities, it does include a population forecast by disability status. Between 2024 and 2044, the number of individuals with one or more disabilities is projected to increase from 335,063 to 446,724.Because the likelihood of experiencing a disability rises with age, the forecast is age-adjusted to reflect the region's aging population and the growing share of residents entering retirement age, when disability rates increase substantially.

This projected growth signals increasing demand for:

- Accessible and adaptable housing
- Proximity to health services and transit
- Supportive housing options

How does current production align with need?

Current production is not well aligned with the region's housing needs, either in terms of who is being served or what types of housing are being built.

From 2018 to 2024:

- Only 11 percent of new units were middle housing, below the 21 percent share identified in Metro's projected housing mix for the 2024-2044 planning period.
- Most new rental production has delivered small units (studios and one-bedrooms) affordable primarily to households earning above 80 percent of AMI.
- Family-sized rental units affordable to households below 80 percent of AMI remain rare.
- New homeownership opportunities are largely inaccessible to households earning below 120 percent of AMI
- Some high-opportunity neighborhoods continue to see limited delivery of income-diverse housing. Meanwhile, new affordable development (particularly subsidized housing) remains concentrated in historically underinvested communities, reinforcing patterns of segregation.

If these trends continue, the region will underproduce housing for lower- and moderate-income households, fall short in delivering sufficient middle housing types, and miss key opportunities to support inclusive, mixed-income neighborhoods in high-opportunity areas.

Part II: Barriers to Housing Development

A wide range of market, structural, and policy barriers constrain the production of needed housing in the Metro region. These barriers affect both private and nonprofit developers, though the specific challenges vary by sector, housing type, and geography. Barriers also interact in complex ways. For example, high development costs can compound the effects of restrictive zoning, while fragmented governance can delay projects even when supportive policies are in place.

This section summarizes key barriers to housing production, drawing on data, case examples, and extensive stakeholder input. While additional barriers may exist, this list highlights some of the primary challenges facing the region today. The analysis incorporates qualitative insights from Metro's RHCS engagement process, as well as prior engagement conducted by Metro and ECOnorthwest. It reflects perspectives from local governments, affordable housing developers, culturally specific organizations, service providers, and community advocates. It also draws on barriers documented in local Housing Production Strategies (HPS) and other publicly available reports.

Together, these sources provide a broad and grounded understanding of the market, non-market, and structural factors shaping housing outcomes across the region.

Market Barriers Affecting Feasibility

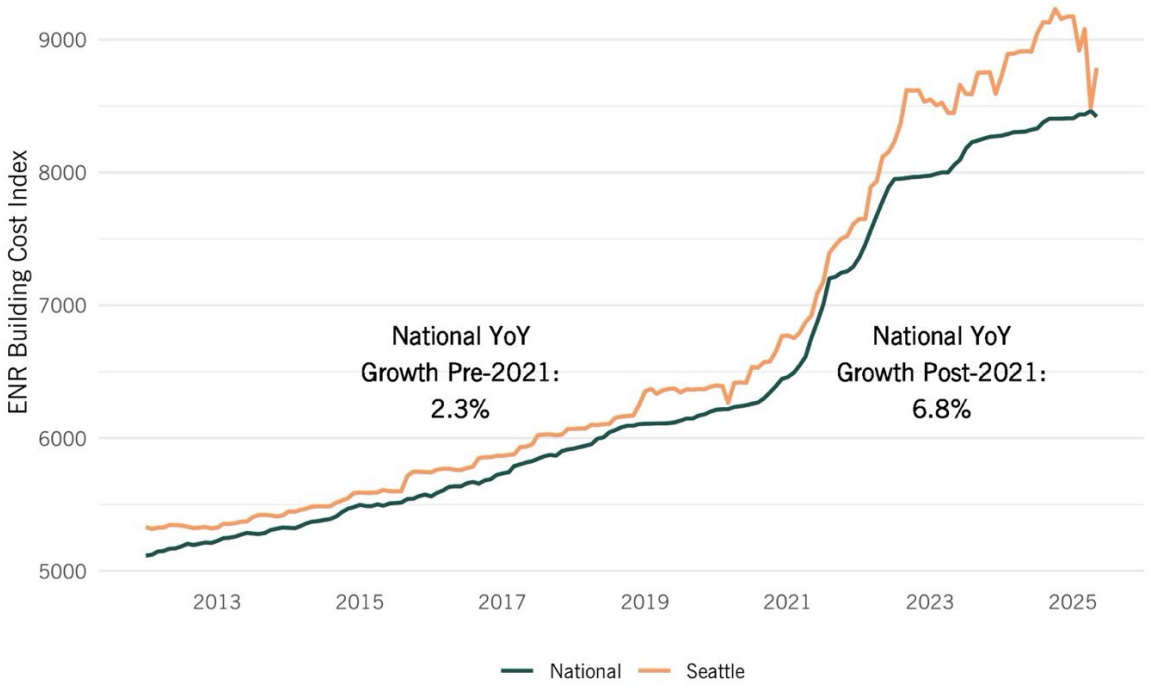
These are economic or financial conditions that inhibit production, even where zoning is permissive.

- **Construction costs escalation**: Inflation rose sharply across the national and global economy in 2022. While the causes of this uptick are still debated, the impact on construction costs in the US was significant. Labor shortages have also contributed to construction cost escalation. From 2012 to 2021, U.S. construction costs (which includes labor and materials) rose an average of 2.3 percent per year. Between 2021 and 2025, that rate jumped to 6.8 percent per year.

  In Seattle, cost escalation was even more pronounced (Exhibit 11). However, the most recent data suggest that construction costs in Seattle may be moving back toward the national average. Because ENR construction cost data is only available for select U.S. cities, Seattle is used here as a proxy for Pacific Northwest trends.

  Although construction cost inflation has stabilized somewhat in the past one to two years, elevated costs continue to pose a significant constraint on project feasibility. Costs are unlikely to decline in real terms. In addition, the potential effects of new or expanded federal tariffs may introduce further uncertainty and could slow development activity by making future construction cost trends more difficult to predict.

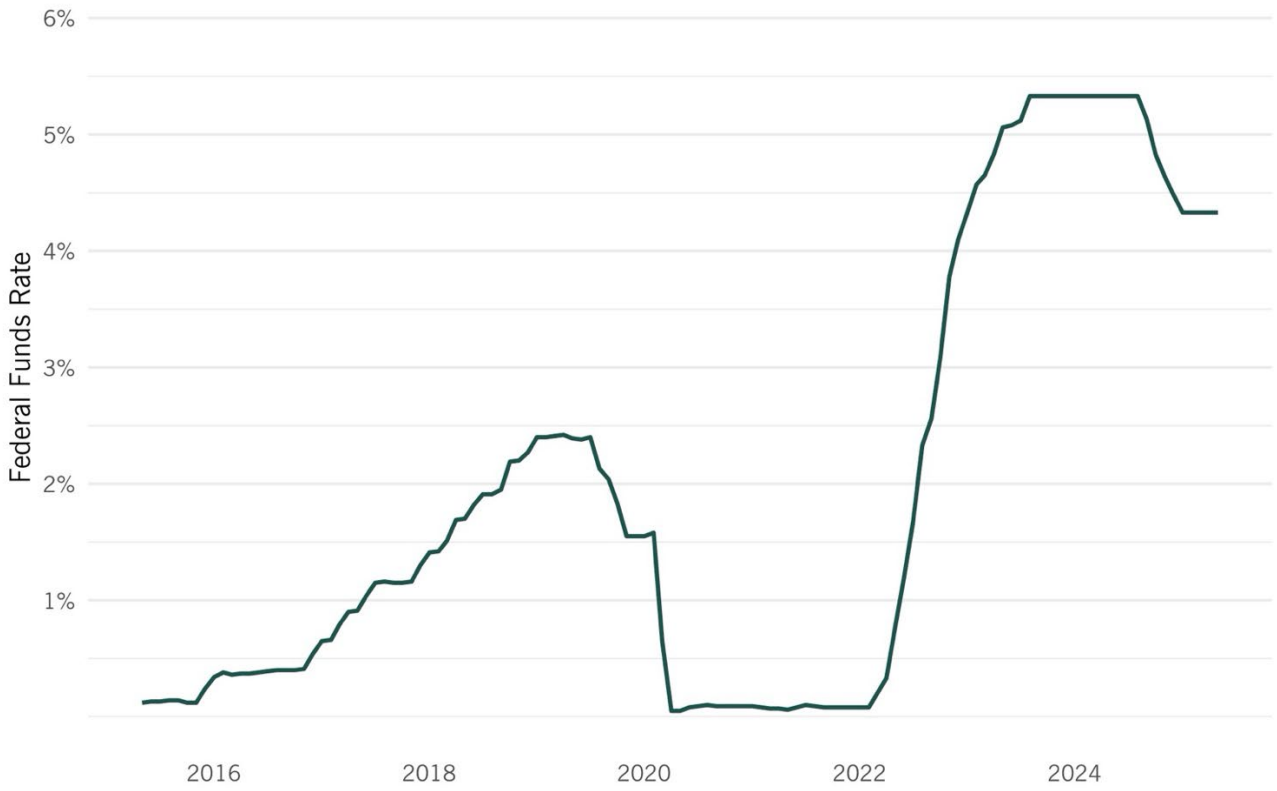
Exhibit 12: Building Construction Cost Escalation, 2012-2025



Source: ENR Cost Data, Building Cost Index, Accessed May 2025.

- **Rising cost of debt:** Federal Reserve interest rate hikes since 2022 have made debt substantially more expensive (Exhibit 16).[3] This challenges development project feasibility across the board but housing affordable to middle-income households (80–120 percent of AMI) may be affected the most. This segment of the market has a narrow feasibility range: developers must keep rents or prices affordable enough to achieve sustainable occupancy but cannot access federal or local affordable housing financing, as most programs are limited to units affordable below 80 percent AMI.

Exhibit 13: Federal Funds Effective Rate (Monthly Average), 2016-2025



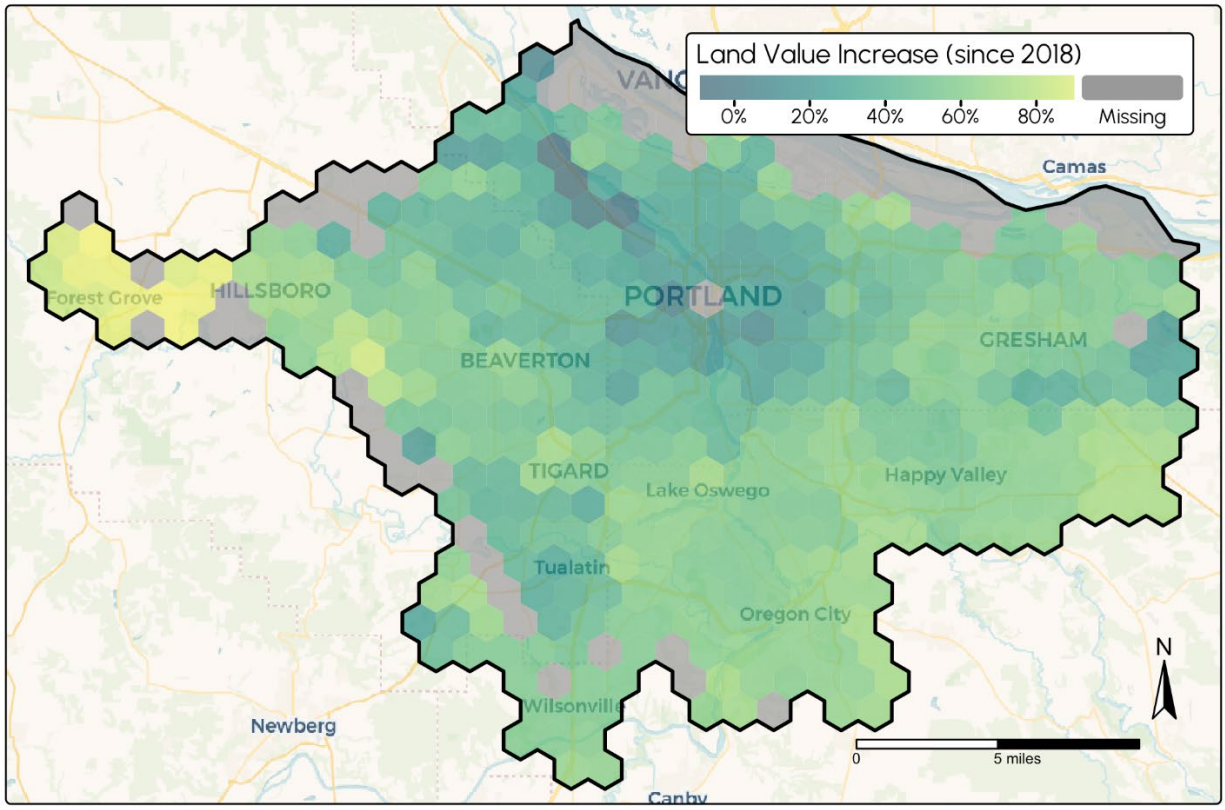
Source: Board of Governors of the Federal Reserve System (US), Federal Funds Effective Rate [DFF], retrieved from FRED

[3] The federal funds rate is the benchmark interest rate that banks charge each other for overnight lending. Changes in this rate influence borrowing costs across the entire economy, including mortgage rates and development financing.

- **Rising land values:** Rising land costs also contribute to challenges with project feasibility across the region. Analyzing land value through individual sales transactions is difficult because of the limited number of transactions and widely varying site characteristics. A more readily available proxy is the change in land value for single-unit residential parcels based on tax assessor data, which can provide one indicator of the magnitude of change in land values over time.

  Exhibit 17 shows changes in land values between 2018 and 2023 for single-unit parcels in the Metro UGB. Land values generally increased over this period based on this indicator, though the degree of the change was more pronounced in outlying parts of the region.

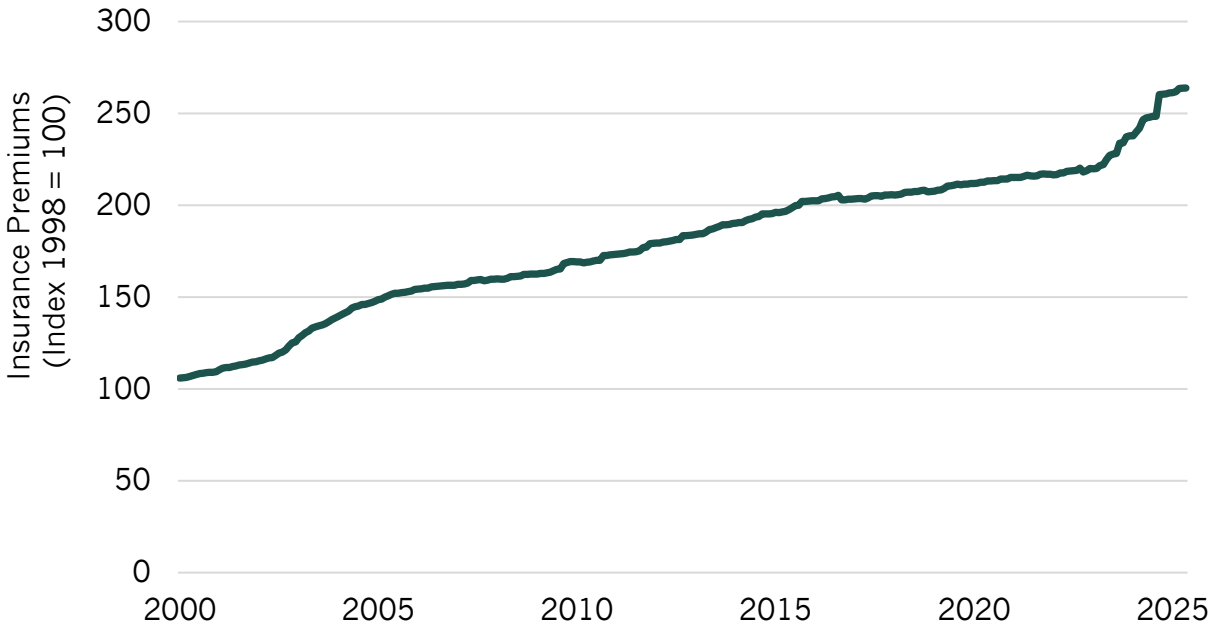
Exhibit 14: Increase in Land Value, 2018-2023



Source: ECOnorthwest, Metro RLIS.

- **Rising insurance costs:** Nationwide, property insurance costs are rising as companies price in climate change risks. This increases operating costs for rental housing and monthly payments for homebuyers, exacerbating affordability challenges. Rising operating costs also increase perceived risk for lenders, which may result in higher borrowing costs or tighter lending standards and further constrain feasibility.

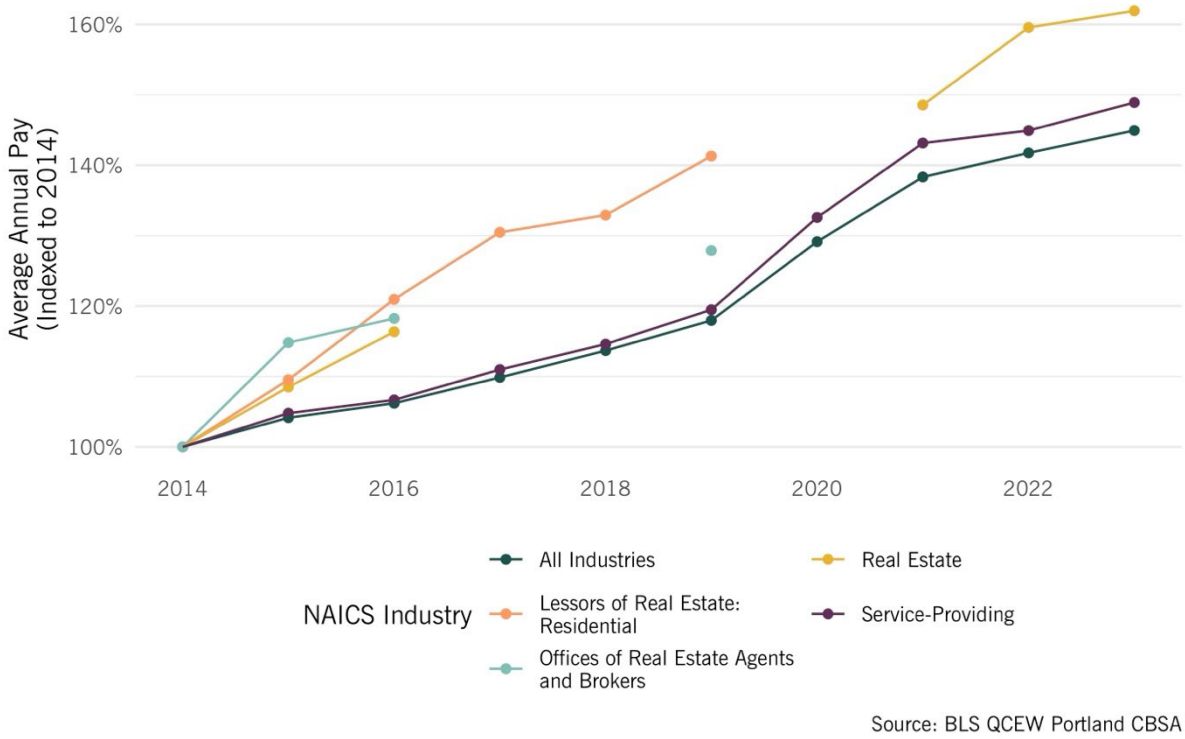
Exhibit 15: Premiums for Homeowner's Insurance



Data Source: U.S. Bureau of Labor Statistics via FRED, 2000-2025.

- **Rising labor costs for property management:** Labor costs for property management have also been on the rise in recent years. An analysis of average wages in the Portland metro area by industry show that wages have increased faster in the real estate management industry compared to wages across all industries as well as service-providing industries (Exhibit 18). This increases operating costs for market-rate rentals and may further challenge feasibility.

Exhibit 16: Increase in Average Annual Wages by Industry, Indexed to 2014



Source: ECOnorthwest. U. S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages 2014-2023.
Notes: Lessors of Real Estate (Residential) and Offices of Real Estate Agents and Brokers are subindustries within Real Estate, Rental and Leasing (NAICS 53). BLS withholds the publication of employment and wage data for any industry level when necessary to protect the identity of employers.

- **Familiarity and risk perception for alternative housing types**. Some developers and lenders who primarily build or finance traditional single-unit homes remain hesitant to pursue less common formats such as cottage clusters or plexes. Interviews suggest that some developers (e.g., production homebuilders) and lenders remain wary of perceived market risks for housing types where there are fewer built examples to gauge buyer interest.
- **Return-on-investment issues for small-scale projects:** Small scale projects can be less cost-effective for developers because fixed costs cannot be spread across as many units. Developer interviews indicate that soft costs including permitting costs and developer overhead are harder to absorb on small projects, which can discourage the incremental density that Metro and local jurisdictions are trying to support.
- **Construction defect liability risk for condos:** Developers cite on-going concerns about construction defect litigation for condominium projects. To offset risk, developers may need to secure costly insurance coverage; many who previously experienced this litigation now avoid condo projects entirely.[4] Some middle housing developers have found ways to mitigate risk for small condo projects, such as self-insuring, negotiating more affordable insurance coverage, or holding units until the liability period expires, but the liability risk continues to limit development of larger-scale condominium projects.

NONPROFIT AND AFFORDABLE SECTOR

While many of the market barriers discussed earlier (such as rising construction costs, high land prices, and increasing operational costs) also affect affordable housing, this sector faces several additional challenges that are distinct to affordable projects that rely on public financial support. The following barriers reflect specific issues that affordable housing developers and service providers highlighted during the RHCS engagement process, as well as themes documented in prior Metro and local housing work.

[4] ECOnorthwest, December 2018, "Impact of Construction Defect Liability on Condominium Production in Oregon." https://olis.oregonlegislature.gov/liz/2019R1/Downloads/CommitteeMeetingDocument/196427

- **Limited availability and predictability of public subsidy:** Low-Income Housing Tax Credits (LIHTC) remain the primary funding source for affordable housing: in 2023, 92 percent of the 54 rental projects supported by the Metro Affordable Housing Bond also used LIHTC. Most relied on 4 percent LIHTC, marking a shift from historic reliance on the more competitive 9 percent LIHTC.[5]

  As noted in Metro's 2024 Affordable Housing Bond Annual Report, 4 percent LIHTCs are not subject to an annual cap but depend on the availability of private activity bonds (PABs), which are federally allocated to states. Historically, Oregon had surplus PABs; however, in 2021, Oregon Housing and Community Services paused 4 percent LIHTC applications due to oversubscription. Combined with rising construction costs, this strained the bond program and statewide affordable housing pipeline. Metro is now working with partners and OHCS to prioritize PAB access for projects with local funding and deeply affordable units.

  Looking ahead, Metro's affordable housing bond funds are nearly fully expended. Without a renewal, the use of 4 percent LIHTCs is expected to decline, as these projects often depend on local gap funding to be financially viable. In that scenario, developments are more likely to serve households at or near 60 percent of AMI and deliver smaller unit sizes, rather than the deeply affordable, family-sized homes supported through bond resources. While the state's Local Innovation and Fast Track (LIFT) program will continue to play a role in supporting affordable housing production, it typically provides lower levels of funding than what has been achievable with local bond investments.

LOW-INCOME HOUSING TAX CREDIT (LIHTC) OVERVIEW

The LIHTC is a federal program that incentivizes private investment in affordable rental housing. It offers investors a dollar-for-dollar reduction in federal tax liability in exchange for financing the construction or rehabilitation of income-restricted housing. This equity allows units to be rented at below-market rates.

Investors typically receive tax credits over a 10-year period. In return, properties must remain rent-restricted and serve low-income households for at least 30 years.

LIHTC projects receive one of two types of credits:

- **9 Percent LIHTC:** Covers up to 70 percent of development costs for new construction without other federal subsidies. Highly competitive.
- **4 Percent LIHTC:** Covers up to 30 percent of development costs, typically used with tax-exempt bonds or other subsidies. Less competitive but offers a smaller subsidy.

[5] Metro Affordable Housing Bond 2024 Annual Report.

- **Rising costs driving larger per-unit subsidy needs, straining available funding:** Cost escalation factors discussed in the previous section are also placing additional strain on affordable housing development. The weighted average cost per unit in the Metro region on Metro bond-funded projects rose from $355,432 in 2020 to $460,949 in 2024—a 5.3 percent annual increase—with more recent projects trending toward $555,871 per unit.[6] These rising costs are increasing the per-unit subsidy required to close funding gaps. Metro bond subsidy amounts have risen from an average of $98,236 per unit in 2020 to $109,777 in 2024, with more recent projects averaging $154,630 per unit (excluding outliers), placing additional pressure on limited public funding sources.[7] Many state funding sources also include per-unit subsidy limits that can become challenging when development costs escalate.
- **Complex funding layers increase time and risk:** Affordable housing projects typically require multiple funding sources to pencil out, including federal LIHTC, state gap financing, and local contributions. Often, each funding source carries its own application timeline, compliance requirements, and reporting obligations. Navigating this complexity adds significant soft costs, extends project timelines, and increases the risk of financing gaps.
- **Permanent Supportive Housing (PSH) development faces layered operational and financing challenges:** In recent years, lenders have become more hesitant to underwrite PSH projects due to the operational challenges of existing projects and a lack of adequate funding for the additional services, operational costs, and perceived risks associated with these projects. These challenges are particularly acute for smaller and culturally specific providers, who may lack access to institutional capital or sustained service funding. As a result, future PSH development may require higher levels of public capital, with reduced reliance on private debt. In addition, many developers remain cautious about pursuing PSH given these challenges. Expanding access to operating and risk mitigation funds and establishing clear, tiered service funding standards will be essential to building developer confidence and incentivizing developers and providers to continue developing and operating PSH.
- **Lack of dedicated preservation funding risks loss of existing affordable housing stock:** Many regulated affordable housing properties face expiring income restrictions and deferred maintenance needs. However, few public funding sources are available to support preservation strategies such as acquisition, recapitalization, and rehabilitation. Without targeted investment in preserving existing units, the region risks a loss in affordable housing, undermining progress toward production goals and displacing current residents.
- **Limited coordination between housing and health/social services:** Housing and health/social service systems remain siloed despite clear overlap in resident needs.

[6] Metro Affordable Housing Bond 2024 Annual Report.
[7] Metro Affordable Housing Bond 2024 Annual Report.

Many affordable housing developments are designed to serve residents who would benefit from supportive services, including households exiting homelessness and those with addiction and mental health challenges. However, funding for these services is often disconnected from housing development financing, creating uncertainty about service availability when projects open.

Stakeholder engagement for the RHCS consistently raised concerns about this disconnect. Focus group participants emphasized that without dedicated, long-term service funding, housing stability is undermined even in well-designed projects. Resident services must be treated as a core component of affordability, not an add-on or an "unfunded mandate."

Several structural challenges exacerbate the issue. Affordable housing financing typically occurs years before project completion, making it difficult to align service funding with project delivery. Lease-up processes can further delay occupancy, as tenant referral and screening must prioritize affordable housing waitlists. In addition, rent delinquency can destabilize projects targeting higher-needs populations if supportive services are not fully funded and integrated from the outset.

Non-Market and Structural Barriers

In addition to market feasibility challenges, housing production across the Metro region is constrained by a range of non-market and structural barriers. These include zoning and entitlement restrictions, site-level and infrastructure challenges, and broader regulatory and governance dynamics. These barriers can interact with market forces: a modest rise in construction costs might not derail a project in a context of fast entitlements and supportive zoning, but with slow permitting, fragmented governance, and complex standards, even otherwise feasible projects may stall.

Barriers also vary geographically. High-opportunity neighborhoods often maintain the most restrictive zoning and entitlement processes, while infrastructure barriers dominate in expansion areas. Addressing these patterns will require targeted and place-specific solutions.

ZONING AND DESIGN STANDARDS

Restrictive zoning and complex development standards continue to limit the types of housing the region most needs in some areas:

- **Restrictive zoning:** While state reforms over the past several years (such as HB 2001 [2019]) have required jurisdictions to remove regulatory barriers to middle housing and affordable multi-unit development, potentially problematic standards remain in some areas. Standards for multi-unit housing including parking minimums, maximum densities, setbacks, and landscaping and open space requirements can

prevent compact and cost-effective multi-unit housing development in medium- and higher-density residential zones. While multi-unit development is often allowed in commercial zones, there may be a ground floor commercial requirement that increases development costs and may not be matched by viable commercial rents. This barrier was highlighted by developers and advocates in Metro's RHCS engagement process and in local HPS documents.

- **Too many zoning districts**: In some jurisdictions, an excessive number of zoning districts and overlay zones creates additional complexity. Portland's zoning code, for example, includes dozens of base and overlay zones with varying use, height, and design standards. Developers also cited this as a barrier during Gresham's HPS engagement, and it is a known challenge in many jurisdictions across the region. Navigating these layers adds time and cost to development. While some jurisdictions have begun code consolidation efforts, the complexity of zoning structures remains a common concern.
- **Zoning and market mismatch:** In some areas, zoning allowances do not align with what the private market can feasibly deliver. This mismatch typically occurs in two ways:
  - *Under-zoning in high-demand areas*. For example, close-in neighborhoods zoned for lower density development (primarily single-unit homes and some middle housing), despite strong market demand for more housing types.
  - *Over-zoning in lower-demand areas.* Some suburban centers and corridors are zoned for multi-story, mixed-use development, but market rents are insufficient to support the higher construction costs for these types and scales of development. Zoning in these areas may mandate building features such as ground-floor retail or structured parking that add cost and risk and may render development infeasible, particularly for affordable housing projects.

    In some cases, limited amenities and older, auto-oriented patterns further reduce market demand. Where cities have updated zoning codes (such as Beaverton's parking reform and VHDZ incentives in Gresham and Hillsboro) and invested in civic infrastructure and public realm improvements (for example, TIF-funded streetscapes), housing delivery has improved.
- **Seismic upgrades requirements:** Redeveloping older buildings in Portland can trigger costly seismic retrofits under city code, which often makes adaptive reuse financially infeasible. Developers have cited this as a reason for demolition over preservation. These requirements are a known barrier for affordable housing rehabilitation and have limited opportunities to repurpose older buildings that could serve lower-income renters.

PROCESS AND PROCEDURES

Even where zoning allows needed housing types, process-related barriers delay or discourage production:

- **Permit processing delays and lack of predictability:** Some jurisdictions, especially smaller cities, lack sufficient staff to process permits and inspections quickly. Delays can jeopardize tax credits and other time-sensitive funding. Inconsistent coordination within jurisdictions, such as conflicting feedback across departments or unclear timelines, further compounds the challenge. Smaller jurisdictions may also need to coordinate with counties or special districts, which adds complexity and can slow approvals. Stakeholders, including the Home Builders Association (HBA), emphasized that even in places with adopted long-range plans, permitting processes can remain unpredictable and difficult to plan around.
- **Appeals and public opposition.** Despite state requirements to allow housing through clear and objective standards, development often requires some adjustments that can trigger more discretionary review processes. In those situations, public opposition can pose a significant barrier, particularly in high-opportunity neighborhoods where affordable housing is most needed. Public appeals can add months to project timelines and deter future proposals in contested areas.

FEES AND SDCS

Fees, including System Development Charges (SDCs) and permit fees, can be an important contributor to project costs. According to the Oregon System Development Charges Study (2022):

- The average total SDC charges in Oregon are roughly $15,000 per unit and can be as high as $50,000. Many jurisdictions in the Metro region have SDCs towards the higher end of this range.[8] These charges can be the equivalent of 3 percent to 6 percent of total development cost.
- SDCs affect some housing more than others—smaller entry-level homes, lower-cost middle housing and apartments, and communities with weaker markets are disproportionately affected by SDCs because the SDCs represent a proportionally larger share of these homes' prices. High-end, single unit detached housing is generally impacted least.
- SDC exemptions for affordable housing exist in some cities but are not universal.

[8] According to the System Development Charges Survey Report (April 2023) from the League of Oregon Cities, Metro region had an average SDC cost of about $27,000 per unit.

SITE-LEVEL BARRIERS

Site-specific barriers can also discourage housing production, for both infill and greenfield development:

- **Fragmented land ownership and absentee landowners:** Fragmented land ownership can be a barrier to housing production. Many older neighborhoods have parcel patterns that make site assembly for larger multi-unit or mixed-use projects challenging and time-consuming. Developers must either consolidate multiple lots which increases cost and risk, or accept smaller, less efficient projects. The problem is compounded when absentee owners hold vacant or underutilized land without intent to develop. Metro and local governments have recognized this challenge; land banking and public site assembly are critical tools to help create viable development opportunities.
- **Infrastructure constraints in greenfields:** Infrastructure gaps are often the primary constraint on housing delivery in Metro's expansion areas. Roads, sewers, water, and parks require massive upfront investment, and without them, housing cannot be built. Much of the new infrastructure to serve greenfield development is funded by developers, either directly (through exactions) or indirectly (through SDCs or similar fees), which can increase development costs. Some larger projects that serve many properties in a broader area must be built by the public service provider, which can create delays when there is insufficient funding or competing priorities.
- **Greenfield challenges:** In addition to high upfront infrastructure costs noted above, housing delivery in greenfield areas can face additional structural barriers, such as:
  - Governance hurdles (e.g., annexation, inter-jurisdictional coordination), particularly in older UGB expansion areas such as Pleasant Valley and North Cooper Mountain.
  - In early phases, new communities often lack amenities (with homes often arriving before retail, transit, or schools) which can reduce livability and make it harder to deliver higher-density housing until the amenities are available.
  - North Bethany and Happy Valley demonstrates how strong public investment and coordinated planning can accelerate delivery, while areas without such planning remain stalled.
- **Infill challenges:** The costs of demolition, site acquisition, environmental cleanup, and/or required infrastructure upgrades make many infill projects that are allowed by zoning financially infeasible. As a result, only a small fraction of the sites zoned to allow infill development will see additional housing production over any given span of time.

- **Brownfield sites:** Brownfields can offer potential for reuse with housing but face significant barriers:
  - Environmental remediation costs are highly variable and create financial uncertainty.
  - Liability risks deter investment.
  - Financing is challenging, with lenders requiring extensive due diligence.
  - Public subsidies for remediation are limited and inconsistent.

GOVERNANCE AND CAPACITY BARRIERS

Regional housing delivery is further constrained by governance and capacity limitations:

- **Fragmented governance and inconsistent policies**. The region's complex governance structure, spanning 3 counties, 24 cities, and multiple special districts, creates inconsistent housing policies and fragmented implementation. Housing needs are regional, but solutions remain largely local and often uncoordinated. The Oregon Housing Needs Analysis (OHNA) work, Metro's RHCS, and cities and counties HPS work represent important steps toward regional alignment, but sustained coordination remains critical to meeting housing targets.
- **Limited public sector capacity**. Some jurisdictions in the Metro region lack the staffing and technical capacity to implement complex housing reforms or manage affordable housing programs. Capacity constraints are particularly acute in smaller jurisdictions which may not have housing specialists on staff.

Equity and Housing Choice Barriers

Persistent equity and housing choice barriers disproportionately impact lower-income residents, communities of color, immigrants and refugees, people with disabilities, and other underserved groups:

- **Displacement from emerging high opportunity areas**: Past and ongoing development patterns in the Metro region have displaced many low-income residents from areas that have become high-opportunity neighborhoods, disproportionately impacting communities of color. Portland's Albina neighborhood illustrates this dynamic, with past policies causing deep generational harm. Recent initiatives aim to mitigate these impacts, but progress will require stronger tenant protections, preservation of affordable housing, and production of deeply affordable units alongside market-rate growth.
- **Lack of subsidized or lower-cost housing in high opportunity areas**: As the prior analysis shows, the Portland Metro includes wealthy, high opportunity enclaves with little lower-cost housing. Recent housing development trends reinforce this

economic exclusivity. There is little financial incentive for private developers to build low-cost housing in higher-income communities when higher-cost housing results in greater profits and less neighborhood opposition. Government intervention may be the primary route to create opportunities for housing serving a range of incomes to co-exist in high opportunity areas.

- **Some affordable housing is located in lower-amenity neighborhoods**: High land costs, limited land availability, and community opposition in high-opportunity areas have historically pushed more affordable housing development to lower-cost parts of the region. The result is that many regulated affordable homes are sited in neighborhoods with fewer amenities and higher concentrations of poverty. This spatial mismatch limits residents' access to opportunity and daily needs.

  The Metro Affordable Housing Bond has helped counteract this trend by setting goals for geographic distribution and access to amenities, and by supporting projects in a diversity of locations across the region. According to the 2024 Bond Annual Report, 35 percent of bond-funded units are located in areas that have historically lacked affordable housing, 56 percent are located in areas where communities at risk of displacement live today, and 44 percent are located in areas historically inaccessible to communities of color. This approach expands housing choice, connects residents to jobs and services, and helps prevent displacement in rapidly changing neighborhoods.

- **Limited accessible housing and barriers to aging in place:** Nationally, fewer than 4 percent of homes offer basic accessibility features, and only 0.15 percent are fully wheelchair accessible. About one-third of units are potentially modifiable but would require renovations.[9] In Oregon, there is no comprehensive inventory of accessible (Type A) or adaptable (Type B) units. ECOnorthwest analyzed available data on recent multi-unit developments in the State and estimated that up to 50 percent of newly built units may meet Type B standards and about 2 percent may meet Type A standards. These estimates vary by region and exclude senior-focused or federally funded affordable housing, which are more likely to include accessible features.[10]

  While building codes require some accessible units, these are typically found in newer, elevator-served apartments—housing that is often unaffordable for low-income households and less attractive to older adults. Many seniors prefer to age in

[9] Joint Center for Housing Studies of Harvard University. "Housing America's Older Adults 2019." Harvard University, 2019. https://www.jchs.harvard.edu/sites/default/files/research/files/harvard_jchs_housing_stock_accessibility_scheckler_2022_0.pdf#:~:text=data%2C%20Bo%E2%80%99sher%20et%20al,livable%20by%20people%20with%20moderate

[10] ECOnorthwest. *OHNA Rulemaking – Potential Compliance Pathways*. Prepared for the Oregon Department of Land Conservation and Development. July 2025.

place in single-family homes or move to detached or senior-oriented housing.[11] Market-rate apartments, which tend to serve younger residents, are less likely to meet the needs of older adults or people with disabilities who are over-represented in low-income households.

- **Shortage of large family rentals:** Larger affordable rental homes for families, including multigenerational and extended families, are similarly scarce. Public engagement has highlighted that Hispanic and other households of color are more likely to live in multigenerational arrangements, yet the housing market offers very few large-family rentals to accommodate them. In response to this gap, the Metro Affordable Housing Bond prioritized family-sized units. As of 2024, about half of all bond-funded homes have two or more bedrooms.
- **Complex application requirements and fees**: Complex housing application processes continue to exclude many households from securing housing. Standard rental screening criteria (e.g., high income-to-rent ratios, strict credit score minimums, criminal background checks, and extensive documentation) can disproportionately disqualify low-income families, immigrants, and people recovering from past instabilities. Language, literacy, and mobility barriers further impede those with limited English proficiency or disabilities when navigating lengthy applications or travelling to different sites. Focus groups in past engagement emphasized the need for low-barrier application approaches and navigation support to ensure equitable access to housing.

  The *Tri-County Planning Body Coordinated Entry Regional Implementation Plan* outlines efforts to improve coordinated entry systems in Clackamas, Multnomah, and Washington counties. These efforts focus on reducing access barriers by standardizing processes and improving connectivity between the three county systems, with the goal of ensuring more equitable access to housing and services for people experiencing homelessness.
- **Inadequate funding for population-specific resident support services:** Veterans, domestic violence survivors, individuals exiting homelessness, youth aging out of foster care, older adults, and other priority populations face distinct housing challenges that require tailored housing models and services. Survivors of domestic violence need trauma-informed housing paired with legal and advocacy support. Individuals with behavioral health or addiction needs may require housing linked to recovery and treatment services. Youth exiting foster care often benefit from supportive housing that includes life skills training and employment services. Veterans may need permanent supportive housing with access to healthcare and

[11] Maggie Ratnayake, et. al., "Aging in Place:: Are We Prepared?," Delaware Journal of Public Health 8, no. 3 (2022): 28-31, https://pmc.ncbi.nlm.nih.gov/articles/PMC9495472/.

Binette, Joanne, and Fanni Farago. 2024 Home & Community Preferences Among Adults 18 and Older. Washington, DC: AARP Research, December 2024. https://doi.org/10.26419/res.00831.001

peer networks. Older adults who require help with housekeeping, mobility, and daily activities often struggle to find affordable housing that provides the supportive services needed to age in place safely and with dignity.

Across these groups, existing programs are fragmented, underfunded, and insufficient to meet demand. Sustainable funding for population-specific resident services (such as case management, community-building, and health navigation) remains a major gap consistently highlighted in stakeholder outreach.

- **Gaps in Fair Housing enforcement, renter protections, and tenant/landlord education:** Stakeholders identified inconsistent enforcement of fair housing laws, limited renter protections, and lack of education about housing rights as barriers to housing stability and access. While federal, state, and local laws prohibit housing discrimination, awareness and enforcement of these protections vary across jurisdictions and populations. Discriminatory practices, though often subtle, continue to restrict access to rental housing. The Fair Housing Council of Oregon reports receiving approximately 1,000 complaints annually from tenants in the Portland Metro region. Statewide, the largest shares of bona fide complaints were based on disability, source of income, race, and sex. [12] While discrimination persists locally and nationally, funding to support fair housing education, enforcement, and advocacy is being cut at the federal level.
- **Limited navigation and culturally specific provider networks:** People of Color, immigrant, and refugee communities often require housing services delivered through trusted, culturally specific organizations due to a legacy of discrimination and mistrust of mainstream systems. Stakeholders report that culturally specific services remain limited and uneven across the region's housing programs. Some residents struggle to navigate housing systems without adequate language access, culturally competent outreach, or trusted intermediaries. Addressing this gap will require expanding partnerships with culturally specific nonprofits, increasing language-accessible navigation support, and funding targeted outreach efforts. It will also require developing culturally responsive housing options that better meet the needs of underserved communities.
- **Lack of stabilization tools for moderate-income households**: Moderate-income households (80–120 percent of AMI) face growing instability but are largely unsupported by current housing programs. Few public tools target this segment, which risks being priced out of the region. Workforce housing incentives and expanded stabilization supports are needed to retain a diverse middle class and prevent further economic displacement. Few public resources are available to assist moderate income older adults needing increasing help with housekeeping and their activities of daily living.

[12] Fair Housing Council of Oregon, *State of Fair Housing Report 2022* (Portland, OR: FHCO, 2022), https://fhco.org/wp-content/uploads/2024/08/FHCO-state-of-fair-housing-report-2022.pdf.

- **Challenges with siting group homes and residential facilities**: Statewide, residential facilities and some group homes face challenges finding suitable sites due to a number of factors, including issues with local codes and neighborhood opposition, While Oregon law requires cities to permit licensed residential homes in areas where single-unit housing is permitted, some informal small group living arrangements that do not meet the definition of a residential home, like Oxford homes for sober living, may face obstacles. Oregon law allows but does not require cities to permit residential facilities (6 or more residents) in areas where multi-unit housing is permitted.

Conclusion

This analysis of housing conditions and market, non-market, and structural barriers provides a preliminary foundation to inform Metro's Regional Housing Coordination Strategy (RHCS). It highlights persistent challenges across funding, infrastructure, governance, equity, and geographic contexts that shape housing outcomes across the region. These insights will be further refined and expanded as Metro integrates findings from additional RHCS components, including deeper community engagement and policy and program reviews. A clear understanding of these barriers will be essential to crafting targeted, actionable strategies that advance Metro's housing goals.

Appendix 4: Evaluation of RHCS actions

Metro, in collaboration with its consultant team and through an engagement process, developed an approach for evaluating potential actions for inclusion in the RHCS. This evaluation framework assisted Metro in identifying actions that fit best with Metro's roles and responsibilities, match available or possible resources, aid local jurisdictions, and promote housing production and affirmatively further fair housing (AFFH). The evaluation framework provides a means of scoring potential actions and ensuring attention to a variety of topics, including fair housing issue areas identified in Oregon Administrative Rules.[1]

A weighted scoring system, summarized in Figure 1, places a high value (50 percent) on outcomes and was used to assess a refined list of actions. According to previous analysis in the 2024 UGR, the greatest needs are for affordable housing and middle-income housing. The two categories used in the evaluation process (housing production and AFFH) address affordability and middle-income housing.

The remaining 50 percent of scoring is focused on legal and political viability, technical and financial feasibility, and whether the action is appropriate for Metro to undertake as the regional government.

Figure 1: Weighted scoring approach for RHCS action evaluation

C. Operational considerations and impact	
15%	C.1 Legal and political viability is high
15%	C.2 Implementation is straightforward or manageable within existing resources (staff and funding)
5%	C.3 Feasible to implement within the 6-year timeframe
15%	C.4 Metro is in the best position to conduct this activity; few organizations are currently working in this space
50%	C.5 Improves regional outcomes around housing production, accessibility, affordability, and AFFH

Having scored each potential action, Metro and its consultant team then reviewed the list of higher-scoring actions to ensure that a variety of housing production, preservation, and fair housing interests were addressed. Several actions that otherwise had scored lower were highlighted because they addressed the topics depicted in Figure 2 and were not unreasonable to implement.

[1] These Fair Housing issue areas apply to city and county Housing Production Strategies. Though they do not, as a matter of law, apply to Metro's RHCS, they were referenced in the RHCS action evaluation process as a useful means of addressing the topic of fair housing.

Figure 2: Topic categories used in the process of evaluating potential RHCS actions

A. Impact on housing production			
Assists cities with housing work	Increases housing production	Preserves and maintains housing that is affordable	Supports development of a mix of housing types (e.g. multifamily, ADUs, middle housing)

B. Impact on Affirmatively Furthering Fair Housing			
Supports accessible and adaptable housing	Supports access to affordable rental housing	Supports access to affordable homeownership	Supports access to community assets and mitigation of exposure to harms
Addresses issues associated with historically underserved or marginalized communities and protected classes	Addresses and disrupts patterns of segregation and their correlation with concentrated areas of affluence and poverty	Supports housing stability, anti-displacement and displacement mitigation	Supports access to permanent housing to resolve homelessness

This evaluation reflects the list of actions as they appeared in the initial public comment draft. In some cases, evaluation related to impacts on housing production and impact on Affirmatively Furthering Fair Housing has evolved through final strategy refinement as details for each action were changed. The current estimated impacts of each proposed action can be found in the detailed action tables in the main document, beginning on page 61.

ID	Action	Description	Average score: operational considerations	Assists cities with housing work	Increases housing production	Preserves and maintains existing housing that is affordable	Supports development of a mix of housing types (e.g., multifamily, ADUs, middle housing)	Supports accessible and adaptable housing	Supports access to affordable rental housing	Supports access to affordable homeowner ship	Supports access to community assets and mitigation of exposure to harms	Addresses issues associated with historically underserved or marginalized communities and protected classes	Addresses and disrupts patterns of segregation, and their correlation with concentrated areas of affluence and poverty	Supports housing stability, anti-displacement and displacement mitigation	Supports access to permanent housing to resolve homelessness
			X: Primary focus of the action and within Metro's control					/: Outside of Metro's direct control				?: Depends on action programming			
1	**Housing pre-development and technical assistance**	Create new housing pre-development and technical assistance funding for site specific housing development	4.05		X			?	?	?	?	X	?	?	?
2	**Expand funding for the brownfield grant program**	Explore opportunities to expand resources available for brownfield cleanup	4.2		X		X	/	?	?	?	?	?	?	?
3	**Local HPS implementation funding and support**	Funding and support for local Housing Production Strategy implementation	4.3875	X	?	?	?	/	?	?	?	?	?	?	?
4	**Regionally available pool of housing professionals for technical assistance**	Consider developing a regionally available pool of housing professionals for technical assistance to smaller jurisdictions to support planning and implementation related to housing production, affordability and choice	4.125	X	?	?	?	/	X	?	?	/	?	?	?
5	**Equitable access to regulated affordable housing**	Evaluate lessons learned and effective practices from implementation of the 2018 Affordable Housing Bond; research models and best practices and develop and share recommendations to strengthen fair housing and equitable access to affordable housing.	4.2						X	?		X			
6	**Community co-design**	Building upon lessons learned and best practices from the 2018 bond and TOD grant program, strengthen requirements and incentives for community participation and co-design in the development and operations of affordable housing. Identify opportunities for Metro to support capacity building for community based and culturally specific organizations to participate in affordable housing development and operations.	3.7									X			

ID	Action	Description	Average score: operational considerations	Assists cities with housing work	Increases housing production	Preserves and maintains existing housing that is affordable	Supports development of a mix of housing types (e.g., multifamily, ADUs, middle housing)	Supports accessible and adaptable housing	Supports access to affordable rental housing	Supports access to affordable homeowner ship	Supports access to community assets and mitigation of exposure to harms	Addresses issues associated with historically underserved or marginalized communities and protected classes	Addresses and disrupts patterns of segregation, and their correlation with concentrated areas of affluence and poverty	Supports housing stability, anti-displacement and displacement mitigation	Supports access to permanent housing to resolve homelessness
7	**Innovative approaches**	Research, evaluate and identify opportunities to advance innovative and non-LIHTC approaches to housing development/construction, financing, and ownership, including: - Modular and manufactured housing and cross-laminated timber and smaller or expandable designs - Social housing and alternative homeownership models, including CLT and resident-owned multi-family housing models - Innovative financing approaches to support development of smaller scale (<20 unit) building types, including PSH Assess barriers and opportunities and identify opportunities to pilot or scale up innovative approaches; approach would include market analysis, best practice research and engagement with public, private, and philanthropic partners to support coordinated research, development and investment strategies.	3.4		**X**		**X**		**X**	**X**					
8	**Middle housing assessment**	Conduct an assessment of middle housing in the region to identify best practices and common barriers.	3.475	**X**	**X**	**/**	**X**	**/**	**?**	**?**	**?**	**/**	**?**	**/**	**?**
9	**Affordable housing operational stabilization strategy**	Develop an affordable housing stabilization strategy to respond to industry-wide challenges due to rising operational costs, increased resident needs, and lack of coordination/alignment with homeless and supportive services.	3.675			**X**			**X**					**X**	**X**

ID	Action	Description	Average score: operational considerations	Assists cities with housing work	Increases housing production	Preserves and maintains existing housing that is affordable	Supports development of a mix of housing types (e.g., multifamily, ADUs, middle housing)	Supports accessible and adaptable housing	Supports access to affordable rental housing	Supports access to affordable homeowner ship	Supports access to community assets and mitigation of exposure to harms	Addresses issues associated with historically underserved or marginalized communities and protected classes	Addresses and disrupts patterns of segregation, and their correlation with concentrated areas of affluence and poverty	Supports housing stability, anti-displacement and displacement mitigation	Supports access to permanent housing to resolve homelessness
10	**Improvements to Metro SHS funded Regional Long-term Rental Assistance (RLRA) policies and implementation**	Evaluate and improve Metro SHS funded Regional Long Term Rent Assistance (RLRA) policies and implementation to address portability and to connect available vouchers with vacant regulated affordable housing units.	4.275			**X**			**X**		**X**		/	**X**	**X**
11	**Regional affordable housing listing service**	Develop a centralized regional affordable housing listing service to support housing navigators and seekers in connecting with information about available units that meet their needs, with an initial focus on building out a portal to assist housing navigators working with households in the homeless services system.	3.85					**X**	**X**	**?**	**X**	/	**X**	/	**X**
12	**Regional land bank plan**	Develop a proposed plan for a regional land bank that outlines the necessary legal framework, governance structures, and operational guidelines. Define clear policy priorities, including considerations related to Affirmatively Furthering Fair Housing, market conditions and funding opportunities.	3.675	**X**	**X**	/	**X**	/	**X**	**X**	**?**	**?**	**X**	**?**	**?**
13	**Permitting and production dashboard**	Explore how to create a permitting and production dashboard to track production trends across the region.	2.5	**X**	**?**	/	**X**	**?**	**?**	**?**	**?**	**?**	/	**?**	
14	**Urban Growth Management Functional Plan housing audit**	Begin a Metro Urban Growth Management Functional Plan audit and cleanup of housing-related titles to align with new State requirements and regional priorities as identified in the 2027 Future Vision.	3.6	**X**	**?**	**?**	**X**	/	**?**	**?**	/	/	**?**	/	/

ID	Action	Description	Average score: operational considerations	Assists cities with housing work	Increases housing production	Preserves and maintains existing housing that is affordable	Supports development of a mix of housing types (e.g., multifamily, ADUs, middle housing)	Supports accessible and adaptable housing	Supports access to affordable rental housing	Supports access to affordable homeowner ship	Supports access to community assets and mitigation of exposure to harms	Addresses issues associated with historically underserved or marginalized communities and protected classes	Addresses and disrupts patterns of segregation, and their correlation with concentrated areas of affluence and poverty	Supports housing stability, anti-displacement and displacement mitigation	Supports access to permanent housing to resolve homelessness
15	**Coordinated legislative agenda**	Convene jurisdictional partners to develop a coordinated legislative agenda for state and federal housing/homelessness resources, including a regional priority to identify funding for infrastructure. The agenda would be updated as needed to meet changing regional needs (or every six years) and guided by appropriate Metro advisory committees for land use, housing and homelessness. Convene with Tribes that are interested in housing development to support urban Native populations to learn about their tribal priorities that can be addressed through Metro's work.	3.675	**X**	**?**	**?**	**X**	**?**	**?**	**?**	**?**	**?**	**?**	**?**	**?**
16	**Affordable housing funding feasibility**	Consider the viability and feasibility of new funding for affordable housing development and preservation. Ensure that any new funding framework is informed by public opinion research and engagement with public, private and nonprofit leaders as well as analysis of housing needs and market conditions, and lessons learned from the 2018 regional housing bond and best practices from other regions;, including evaluating opportunities to strengthen racial equity, fair housing and community resilience outcomes and alignment/integration with homeless and supportive housing services.	4.325	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**

ID	Action	Description	Schedule for adoption	Schedule for implementation	Magnitude of impact on development of needed housing	Magnitude of impact on housing affordability or choice	Time frame over which it is expected to impact needed housing	Department(s)	Budget or staffing impact
1	Housing pre-development and technical assistance	Create new housing pre-development and technical assistance funding for site specific housing development	Not applicable	2026	Low	Low	3-5 years	PD&R, Housing	FTE may be needed
2	Expand funding for the brownfield grant program	Explore opportunities to expand resources available for brownfield cleanup	Not applicable	2026	Medium	Medium	2-5 years after funding is received	PD&R	FTE may be needed
3	Local HPS implementation funding and support	Funding and support for local Housing Production Strategy implementation	Not applicable	2026	Medium	Low	5-10 years	PD&R	FTE may be needed
4	Regionally available pool of housing professionals for technical assistance	Consider developing a regionally available pool of housing professionals for technical assistance to smaller jurisdictions to support planning and implementation related to housing production, affordability and choice	Not applicable	2026	Medium	Low	3-5 years	PD&R, Housing	FTE may be needed
5	Equitable access to regulated affordable housing	Evaluate lessons learned and effective practices from implementation of the 2018 Affordable Housing Bond; research models and best practices and develop and share recommendations to strengthen fair housing and equitable access to affordable housing.	TBD	2026	Low	Medium	TBD	Housing	M&S funding
6	Community co-design	Building upon lessons learned and best practices from the 2018 bond and TOD grant program, strengthen requirements and incentives for community participation and co-design in the development and operations of affordable housing. Identify opportunities for Metro to support capacity building for community based and culturally specific organizations to participate in affordable housing development and operations.	TBD	2026	Low to None	Medium	TBD	Housing, PD&R	M&S funding

ID	Action	Description	Schedule for adoption	Schedule for implementation	Magnitude of impact on development of needed housing	Magnitude of impact on housing affordability or choice	Time frame over which it is expected to impact needed housing	Department(s)	Budget or staffing impact
7	Innovative approaches	Research, evaluate and identify opportunities to advance innovative and non-LIHTC approaches to housing development/construction, financing, and ownership, including: - Modular and manufactured housing and cross-laminated timber and smaller or expandable designs - Social housing and alternative homeownership models, including CLT and resident-owned multi-family housing models - Innovative financing approaches to support development of smaller scale (<20 unit) building types, including PSH Assess barriers and opportunities and identify opportunities to pilot or scale up innovative approaches; approach would include market analysis, best practice research and engagement with public, private, and philanthropic partners to support coordinated research, development and investment strategies.	Not applicable	2026	Medium	Medium	TBD	Housing, PD&R	M&S funding
8	Middle housing assessment	Conduct an assessment of middle housing in the region to identify best practices and common barriers.	Not applicable	2026	Low	Low	TBD	Housing, PD&R	M&S funding
9	Affordable housing operational stabilization strategy	Develop an affordable housing stabilization strategy to respond to industry-wide challenges due to rising operational costs, increased resident needs, and lack of coordination/alignment with homeless and supportive services.	Not applicable	2026	Medium	Medium	TBD	Housing	M&S funding
10	Improvements to Metro SHS funded Regional Long-term Rental Assistance (RLRA) policies and implementation	Evaluate and improve Metro SHS funded Regional Long Term Rent Assistance (RLRA) policies and implementation to address portability and to connect available vouchers with vacant regulated affordable housing units.	TBD	2027	Low	Medium	TBD	Housing	Possible M&S
11	Regional affordable housing listing service	Develop a centralized regional affordable housing listing service to support housing navigators and seekers in connecting with information about available units that meet	Not applicable	2026	Low	Medium	1-2 years	Housing	FTE and M&S funding

ID	Action	Description	Schedule for adoption	Schedule for implementation	Magnitude of impact on development of needed housing	Magnitude of impact on housing affordability or choice	Time frame over which it is expected to impact needed housing	Department(s)	Budget or staffing impact
		their needs, with an initial focus on building out a portal to assist housing navigators working with households in the homeless services system.							
12	Regional land bank plan	Develop a proposed plan for a regional land bank that outlines the necessary legal framework, governance structures, and operational guidelines. Define clear policy priorities, including considerations related to Affirmatively Furthering Fair Housing, market conditions and funding opportunities.	Not applicable	2027	Low	Low	TBD	PD&R, Housing	M&S funding
13	Permitting and production dashboard	Explore how to create a permitting and production dashboard to track production trends across the region.	Not applicable	2027	Low	Low	TBD	PD&R	FTE and M&S funding
14	Urban Growth Management Functional Plan housing audit	Begin a Metro Urban Growth Management Functional Plan audit and cleanup of housing-related titles to align with new State requirements and regional priorities as identified in the 2027 Future Vision.	2029	2027	Low	Low	Long term	PD&R	Low to none
15	Coordinated legislative agenda	Convene jurisdictional partners to develop a coordinated legislative agenda for state and federal housing/homelessness resources, including a regional priority to identify funding for infrastructure. The agenda would be updated as needed to meet changing regional needs (or every six years) and guided by appropriate Metro advisory committees for land use, housing and homelessness. Convene with Tribes that are interested in housing development to support urban Native populations to learn about their tribal priorities that can be addressed through Metro's work	2028	2028	Medium	Medium	3 - 6 years	GAPD, Housing, PD&R	Low/medium
16	Affordable housing funding feasibility	Consider the viability and feasibility of new funding for affordable housing development and preservation. Ensure that any new funding framework is informed by public opinion research and engagement with public, private and nonprofit leaders as well as analysis of housing needs and market conditions, and lessons learned from the 2018 regional housing bond and best	As determined by Council	As determined by Council	High	High	TBD	Council Office, COO, GAPD, Housing, PD&R	FTE and M&S funding

ID	Action	Description	Schedule for adoption	Schedule for implementation	Magnitude of impact on development of needed housing	Magnitude of impact on housing affordability or choice	Time frame over which it is expected to impact needed housing	Department(s)	Budget or staffing impact
		practices from other regions;, including evaluating opportunities to strengthen racial equity, fair housing and community resilience outcomes and alignment/integration with homeless and supportive housing services.							

Measures already implemented by Metro to promote the development of housing

Overview and context

Statutes instruct Metro, when completing its RHCS, to review and consider measures already implemented to promote the development of needed housing. This review can inform Metro as it considers possible actions for inclusion in the 2025 RHCS.

Metro's engagement in promoting diverse housing dates to its origins in the late1970s. Before Metro was formed, the Columbia Region Association of Governments (CRAG) had an even longer history. Metro's more recent history (2000s forward) illustrates its shift from its role as a policymaker and regulator towards its role as a convener, provider of data and analysis, advocate for best practices, and administrator of regional funding.

Metro's past and current work in the housing sphere can be grouped into several general categories:

- Regional policies
- Regulation
- Legislative advocacy and participation in rulemaking
- Best practice and information sharing
- Partnerships and collaboration
- Anti-displacement focus in transit corridor planning
- Funding

Current and past programs and efforts are listed to provide a fuller picture of Metro's engagement in housing. Lessons can be gleaned from what Metro has chosen to continue as well as efforts that are no longer active. This review excludes several programs that have indirect connections to the housing topic but that have long-term impacts on regional growth patterns, housing production, anti-displacement, and affordability. Examples include the Regional Transportation Plan, the Climate Smart Communities Strategy, Regional Flexible Fund Allocations, and economic development activities that impact job creation and household incomes.

As additional context for the roles that Metro has filled, it is worth noting at least two legal constraints on Metro's regulatory authority that guide Metro's focus on non-regulatory approaches. First, Metro's voter-approved Charter includes a prohibition against Metro requiring residential density increases in single-family neighborhoods within the existing urban growth boundary. To some extent, this prohibition has been rendered moot by state requirements for local jurisdictions to allow middle housing in neighborhoods. However, this Charter provision does still bar Metro itself from requiring additional density in neighborhoods.

Second, Oregon Revised Statute 197A.465 (2) states that Metro may not adopt a land use regulation or functional plan provision, or impose as a condition for approving a permit a requirement that has the effect of establishing the sales or rental price for a housing unit or residential building lot or parcel, or that requires a housing unit or residential building lot or parcel to be designated for sale or rent to a particular class or group of purchasers or renters.

Regional policies

Regional policies provide high-level guidance on the long-range vision for the region. Typically, these policies are implemented through a variety of other programs, partnerships, and regulations. Many of these types of efforts occurred in the 1990s, with subsequent refinements to policies over the years.

Areawide Housing Opportunity Plan

Status: inactive

In 1979, the Metro Council adopted the Areawide Housing Opportunity Plan to promote the planning and construction of affordable housing. The U.S. Department of Housing and Urban Development approved the plan in 1980.

Metro Housing Goals and Objectives

Status: inactive

In 1980, the Metro Council adopted Metro Housing Goals and Objectives, which were intended to address Statewide Planning Goal 10 (Housing).

Future Vision

Status: update initiated in 2025

As required by Metro's Charter, the Metro Council adopted a Future Vision in 1995. The Future Vision contains high-level statements about the region's desired future and general descriptions of some of the implementation measures to take. It describes a goal of having a variety of housing and neighborhood choices as well as a goal to intensify urban development. Metro has recently begun a process to update the Future Vision.

Regional Urban Growth Goals and Objectives (RUGGOS)

Status: inactive; now implemented through other plans

The RUGGOS were adopted by the Metro Council in 1995 to establish regional policies that were a precursor to regulations in the 1996 Urban Growth Management Functional Plan. The RUGGOS did not directly regulate local governments but established many of the topic areas that were eventually addressed in regulations. Regarding housing, the RUGGOS called for a "fair share" approach to planning for housing affordability around the region. Concepts found in the RUGGOs have been incorporated into subsequent planning documents.

Regional Framework Plan

Status: active and periodically updated

Metro's Regional Framework Plan was adopted in 1997 and has been amended in the ensuing years. The Framework Plan describes the high-level policies of the Metro Council, with Chapter One describing Metro's land use policies.

Policy 1.3 addresses Housing Choices and Opportunities, emphasizing the Metro Council's commitment to providing a variety of housing choices, "paying special attention to those households with fewest choices." The Metro Council's policies also emphasize the importance of

focusing housing growth in centers, corridors, and other areas that are well-served by transit to reduce the combined cost of housing and transportation.

Of relevance to the Regional Housing Coordination Strategy, policies 1.3.5 through 1.3.13 focus on the Metro Council's approach to working with local jurisdictions with a focus on incentives and coordination.

2040 Growth Concept

Status: active and periodically updated

Adopted in 1995, the 2040 Growth Concept is the region's long-range spatial plan for growth. The Growth Concept, implemented through a variety of other programs, partnerships, and policies, seeks to focus housing growth in the Central City, Regional Centers, Town Centers, Corridors, Main Streets, and Station Communities. These 2040 "design types" are intended to have a variety of activity levels and mixed-use, transit friendly development. The Growth Concept also envisions carefully planned urban growth boundary expansions into designated urban reserves as well as growth in neighboring cities outside of Metro's jurisdiction. Large portions of the region are designated as Neighborhoods in the Growth Concept. Per Metro's voter-approved Charter, Metro is prohibited from requiring density increases in existing Neighborhoods.

The 2040 Growth Concept Map has undergone periodic updates since its original adoption to reflect:

- New centers such as Cornelius Town Center and Tanasbourne/Amber Glen Regional Center
- Conceptual centers have been replaced with specific center boundaries
- Designated urban and rural reserves
- New and proposed high-capacity transit lines
- UGB amendments
- Changes to Title 4 designations (Industrial and Employment Areas)
- Simplification of Inner Neighborhoods and Outer Neighborhoods into the combined "Neighborhoods" design type
- New parks and natural areas

Metro intends to update the 2040 Growth Concept in the next several years.

Strategic Plan to Advance Racial Equity, Diversity, and Inclusion

Status: active

In June 2016, Metro adopted the Strategic Plan to Advance Racial Equity, Diversity and Inclusion. The strategic plan focuses on removing barriers for people of color and improving equity outcomes for these communities by improving how Metro works internally and with partners around the Portland region. The strategic plan identifies an objective of convening regional partners to support the development of stable and affordable housing.

Regulation

Metro's Urban Growth Management Functional Plan, which was first adopted in 1996, is the primary way that Metro implements the Metro Council's Framework Plan policies through

regulation. However, the Functional Plan does not directly regulate development. Instead, the Functional Plan contains direction to cities and counties about what must be addressed in their local plans. Metro completes an annual compliance report that documents local jurisdiction compliance with the Functional Plan. Amendments to the Functional Plan have generally been incremental and it has been approximately two decades since Metro last undertook the development of a new Functional Plan Title (Title 13: Nature in Neighborhoods).

Urban Growth Management Functional Plan

Status: active and periodically updated

Title 1: Housing Capacity

- Intended to encourage compact urban form and a fair-share approach to meeting housing needs.
- Generally, requires cities and counties to maintain or increase their housing capacity.
- Requires cities and counties to allow accessory dwelling units in zones that authorize detached single-units dwellings. This provision predates state requirements to allow ADUs by about two decades.

Title 6: Centers, Corridors, Station Communities, and Main Streets

- Encourages mixed-use, transit-friendly development in designated urban centers and corridors.
- Identifies 2040 Growth Concept centers, corridors, station communities, and main streets on the Title 6 Map. Requires local adoption of boundaries for centers by the end of 2025.
- Metro's 2040 Growth Concept centers serve the role that Climate Friendly Areas do elsewhere in the state under the state's Climate Friendly Equitable Communities (CFEC) program. This recognizes that the Metro region's work to encourage compact, mixed-use development in centers predates the CFEC program by almost 30 years.
- Sets voluntary expectations for cities and counties if they wish to be eligible for regional investments, currently defined as high-capacity transit.
- Provides cities and counties with opportunities for lower mobility standards and trip generation rates in these urban design types, facilitating housing development.

Title 7: Housing Choice

- Set voluntary affordable housing production goals for the 2001 to 2006 time period for local jurisdictions.
- Requires local jurisdictions to report on regulated affordable housing production. To ensure consistency in reporting, Metro has taken on updating the regional inventory of regulated affordable housing on a periodic basis.
- See Attachment 1 for additional history regarding Title 7. Generally, Metro's attempt at setting affordable housing production goals was unsuccessful, in large part because local jurisdictions were unable to meet those goals without funding. This history appears to indicate that establishing numeric housing production goals and reporting requirements are not a substitute for funding public housing.

Title 11: Planning for New Urban Areas

- Establishes requirements for local jurisdictions when concept planning for urban reserves and when comprehensive planning for recent UGB additions.

- Specifies that a concept plan for an urban reserve shall be developed prior to its addition to the UGB.
- Requires that a local jurisdiction consider the housing needs of the city, county, and region when planning for new urban areas. This requirement was adopted on the advice of MPAC who, in 2010, deliberated approaches to supporting affordable housing in new UGB expansion areas. MPAC formed a subcommittee to discuss the topic and ultimately did not recommend any specific housing affordability requirements for concept plans because they wished to be sensitive to local conditions.

Title 12: Protection of Residential Neighborhoods

- Reiterates the Metro Charter prohibition against Metro requiring density increases in single-family neighborhoods.

Title 14: Urban Growth Boundary

- Depicts the UGB and adopted urban and rural reserves on the Title 14 Map.
- Describes several processes by which the Metro Council may consider expansion of the UGB for housing needs.
    - Legislative UGB amendments: per statute, considered at least every six years based on completion of an Urban Growth Report (UGR), which includes a regional forecast, a regional housing needs analysis (current and future housing needs), a regional buildable land inventory, and reporting on housing trends.
    - Mid-cycle UGB amendments: process adopted by Metro in 2017 per state enabling legislation that was sought by Metro and a coalition. Provides a mid-cycle opportunity for cities to propose residential UGB expansions upon a demonstration that there is a need to revise the most recent UGR (i.e., household growth or residential land consumption is happening faster than anticipated).
- Describes the Metro Council's use of conditions of approval when expanding the UGB to specify expectations for urbanization and housing planning.

Anti-displacement focus in transit corridor planning

Historically, decisions on major public investments have not fully involved the people impacted by the immediate or downstream effects of these investments. Without bringing in the perspectives of the full range of impacted stakeholders, the social and economic implications of major transportation, land use and economic development decisions are not adequately explored. This lack of direct dialogue results in missed opportunities to effectively address key concerns, develop sustainable solutions and, ultimately, achieve equitable outcomes.

Beginning with its work on the Southwest Corridor high-capacity transit project, Metro has focused on equitable development in all subsequent corridor planning efforts, including 82nd Avenue, Division St., and Tualatin Valley Highway. Ongoing implementation efforts are aimed at ensuring that businesses and residents can remain in these communities and enjoy the benefits of improvements.

Legislative advocacy and participation in rulemaking

Status: active

Metro routinely participates in state legislative processes related to housing and urban development. Typically, Metro is supportive of legislation that enhances housing choices, housing funding, infrastructure provision, and efficient use of land.

Metro has participated in state rulemaking related to the OHNA program since its inception, both on rulemaking advisory committees and on several technical advisory committees.

Funding

Transit-Oriented Development program

Status: active

Established in 1998, Metro's Transit-Oriented Development program makes strategic investments in high-density communities along greater Portland's high-frequency transit network. The program plays an important role in supporting development that is aligned with the region's 2040 Growth Concept.

The 2023 Transit-Oriented Development Program Strategic Plan formalized and expanded on Metro's commitment to fostering equitable and climate-friendly communities designed around the region's transit system. It set new goals around affordability, climate and racial equity, and it provided additional concepts to leverage funding to increase the program's impact over time.

The program's desired outcomes place equity and healthy communities at the core:

- Higher density that supports transit ridership
- Places that are safe, convenient and enjoyable without a car
- Preventing displacement of communities of color and people with low incomes
- Increased number of affordable housing units near frequent service transit
- Economic benefits for people with low incomes and people of color
- Innovation in housing development and design to advance equity, demonstrate climate leadership and achieve cost efficiency
- Equitable Development Strategies
- To date, the Transit-Oriented Development Program has produced 11,139 housing units in the region. More than half are permanently affordable to people making 60 percent or less of area median income. The program has also produced over a million square feet of retail space near transit.

2040 Planning and Development Grants

Status: active

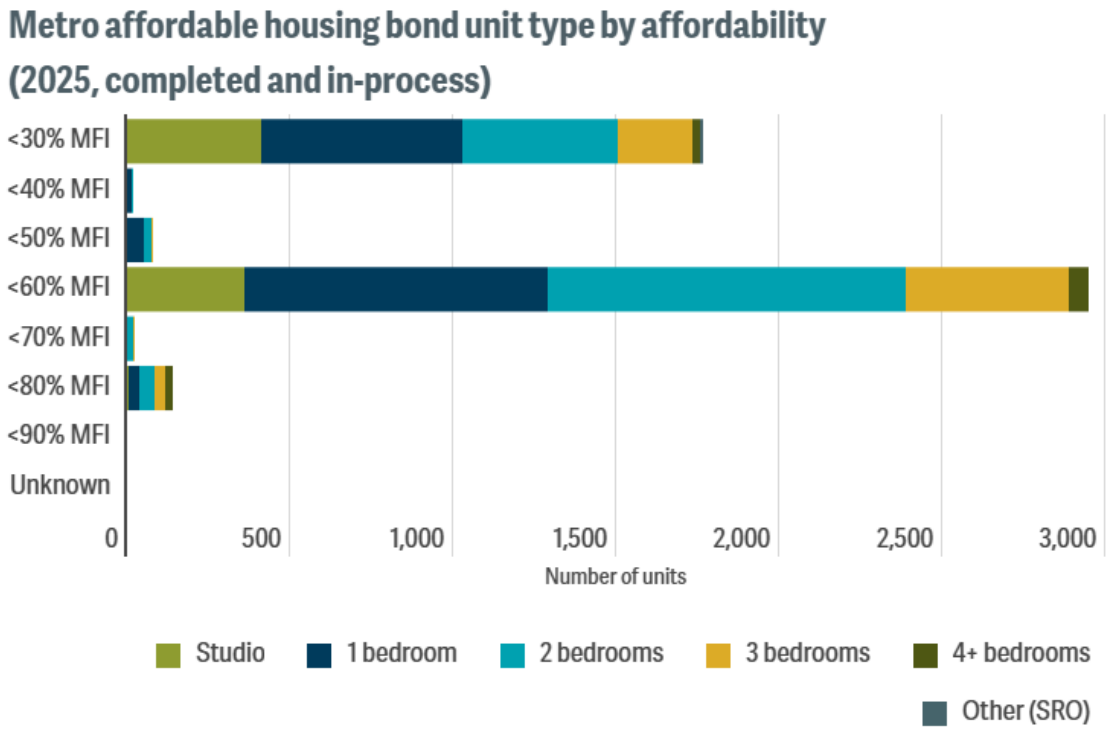
Since 2006, Metro has administered a grant program that utilizes revenues from a construction excise tax to fund local planning efforts aimed at removing barriers to development. The program was originally focused on funding UGB expansion area concept planning efforts but has been expanded to include planning efforts inside the existing UGB. Since its inception, Metro has awarded more than $30 million to fund over 135 projects around the region. These grants enable Metro's partners to update their plans and policies to encourage more housing production. In the last

decade, the grant program has focused more on supporting equitable housing, including a special grant round in 2016 with that focus.

Affordable Housing Bond

Status: active

In 2018, Metro asked voters to support the creation of new affordable housing in the region. The resulting voter-approved bond generates $652.8 million for new affordable housing construction in the region and is on track to create an estimated 5,600 affordable homes – 1,700 more than its initial goal.



Metro site acquisition program

The affordable housing bond program sets aside 10% of its funds for Metro's Site Acquisition Program, which was created to buy land for affordable housing where the region needs it most. Guided by community input gathered at the beginning of the program, Metro staff search for sites across greater Portland that are near amenities like grocery stores, parks, schools and transit, and meet one or both criteria: areas where communities of color are at risk of displacement and areas with limited affordable housing options.

The site acquisition program has resulted in 672 new residential units around the region. They are being built in all three counties and half are larger (2+ bedroom) units for families. Slightly less than half (268 units) will be for people who make 30 percent or below area median income.

Supportive Housing Services

Status: active

In May 2020, voters in greater Portland approved Measure 26-210 to fund services for people experiencing or at risk of homelessness. Metro now works with Clackamas, Multnomah and Washington counties to reduce homelessness through programs and services that help people find and keep safe and stable homes. These include but are not limited to:

- Emergency services such as outreach and shelter
- Placement into housing
- Help paying rent (both emergency and long-term rent assistance)
- Advocacy and case management
- Services in the areas of mental health, physical health, language and culture needs, education, employment, addiction and recovery, tenant rights and others.

Brownfield assessment grants

Status: active

Contamination or perceived contamination of properties can prevent them from providing new housing and business opportunities. Metro offers assistance for brownfield site assessments for properties that could be developed into community assets. This grant from the EPA runs through Sept. 30, 2028.

The project focuses on several main areas:

1. Conduct full Phase I/Phase II environmental site assessments on properties throughout greater Portland, with an emphasis on four target corridors.
2. Work with community members to increase understanding of how brownfields impact communities and how to engage in cleanup and redevelopment.
3. Provide technical assistance to property owners addressing contaminated sites.
4. Work with community members and potential developers to move forward with site cleanups based on redevelopment opportunities.
5. Build capacity of residents and local businesses to access careers and job opportunities in environmental remediation and redevelopment.
6. Build partnerships and engage communities.

Regional Housing Choice Revolving Fund

Status: inactive

In 2007, the Metro Council approved a one-million-dollar contribution as seed money for the creation of a $10-$20 million Regional Housing Choice Revolving Fund (RHCRF). The intent was to leverage $9-$19 million in matching contributions from public, private, and charitable partners to create the fund, which would be managed by an experienced nonprofit community-based fund administrator and governed by a regional board of directors.

Metro's contribution of $1 million was contingent upon several conditions being met, including the establishment of a fund with at least $10 million in capital. Upon the two year deadline for meeting those conditions, financial matches were inadequate.

Had it been fully funded, the RHCRF would have extended low-interest loans to catalyze the development and preservation of affordable housing in the Metro area with a focus on implementing the 2040 Growth Concept. Non-profit and for-profit developers would utilize these low-interest loans for such purposes as site acquisition and holding, predevelopment costs for planning and design, and short-term debt financing for the acquisition of existing rental properties with expiring affordability requirements.

Best practices and information sharing

Social Vulnerability Explorer

Status: active

The Social Vulnerability Explorer is a publicly available online mapping tool maintained by Metro that provides socioeconomic and demographic spatial data. Commonly used data from the U.S. Census Bureau sometimes do not fully capture information about vulnerable people and their needs. The Social Vulnerability Explorer boosts this Census data with other data sources that have demographic information. The data can be explored at various levels: neighborhood, city and county. It offers this information in a way that can be visualized and analyzed through maps using only a web browser.

Distributed Forecasts

Status: active

To fulfill its forecast coordination responsibilities, Metro conducts a regional population, household, and employment forecast at least every six years as part of its urban growth management decisions. The most recent regional forecast was adopted as part of the 2024 urban growth management decision. After the adoption of a regional forecast, Metro undertakes what it calls a Distributed Forecast, which describes how much growth is expected occur in each Metro area jurisdiction. The Distributed Forecast is developed in coordination with local jurisdictions. These forecasts are considered by the State of Oregon Department of Economic Analysis when setting housing targets and housing need allocations for cities and urban unincorporated areas under the OHNA program. Metro will soon begin the process of developing the 2050 Distributed Forecast and anticipates Council consideration in 2026.

Construction Careers Pathways

Status: active

Additional skilled tradespeople are needed to support housing production in the region. The Construction Career Pathways policy framework and toolkit outlines seven critical strategies to provide reliable career pathways for women and BIPOC people. These strategies were developed by the Public Owner Workgroup, which was comprised of 16 public agencies, and included significant input from industry and community stakeholders. Currently, nine public agencies have formally adopted the framework:

- Metro
- Prosper Portland
- Clackamas County

- Multnomah County
- Washington County
- City of Portland
- Portland Public Schools
- Portland Community College
- TriMet

Metro will be working with additional jurisdictions to adopt the framework, support their implementation and build collaboration to increase the impact of these strategies throughout the region.

Residential development indicators

Status: active

Metro produces biennial reports on housing development inside the UGB. The most recent report is available as Appendix 5A to the 2024 Urban Growth Report. The report highlights housing construction and land use trends, including information on housing types, locations, and densities.

Regional Barometer

Status: inactive, no longer available

The Regional Barometer is an open data tool that provides a snapshot of data from early 2020. The tool provided facts and figures, access to related stories, research and reports, and downloadable data for additional analysis.

Regional Snapshots

Status: inactive, but available online

In this now-defunct web-based storytelling effort, Metro used data and personal accounts to highlight challenges related to community development and change. Several installments focused on housing production and housing affordability. In keeping with its goal of raising awareness of topics, the Regional Snapshots program also hosted a series of speaker events, several of which focused on housing diversity and affordability.

Community Investment Toolkits

Status: inactive, but available online

From about 2007 to 2010, Metro developed several Community Investment Toolkits. These toolkits offered best practices for innovative designs, financial incentives, and system development charges to encourage housing production.

Expert Advisory Group on Developing Centers and Corridors

Status: inactive, but report is available online

In 2009, Metro convened an expert advisory group to identify barriers to mixed-use, compact development. The group produced a report, which is available on Metro's website.

State of the Centers

Status: inactive, but reports are available online

In the early 2000s, Metro published several State of the Centers reports. 2040 Centers are intended to be a primary location for housing and job growth. These reports provide a description and demographic information for each center, highlight community actions to enhance it, and list its private and public amenities. A now-defunct online data tool on centers was also created by Metro.

Regional Equity Atlas

Status: inactive; some older opportunity maps remain available online

On the heels of the region's unsuccessful 2010 and 2011 applications for a HUD Sustainable, Livable Communities Grant, Metro partnered with the Coalition for a Livable Future to complete the Regional Equity Atlas 2.0. The Atlas consisted of an online mapping tool that provided decision makers and others with the means of creating opportunity maps that depicted disparate outcomes for marginalized communities to inform policy and investment decisions, particularly decisions about where to encourage housing development. The partnership also included a series of trainings to build community capacity to use the mapping tool to influence decision making. Metro provided a series of opportunity maps in past urban growth reports.

Parcelization Study

Status: completed

This 2012 study commissioned by Metro sought to understand the extent to which parcelization of land (division of land into many parcels) is an impediment to development. The study found that, of the many barriers to development, parcelization is probably not generally a major issue. However, it may be a critical problem in specific instances.

Equitable Housing Initiative

Status: completed

The Equitable Housing Initiative was a precursor to Metro's housing funding measures. The initiative produced a 2016 report entitled Opportunities and Challenges for Equitable Housing.

Housing preference survey

Status: complete

To inform the 2014 Urban Growth Report, Metro partnered with several organizations to conduct a residential preference survey that sought to develop a better understanding of housing and neighborhood preferences and how respondents weigh tradeoffs like costs and commute times. The survey used a variety of techniques including a revealed preference survey, a stated preference survey, and traditional attitudinal surveys. It proved difficult to draw conclusions from this work because of population sampling challenges.

Partnerships and collaboration

Brownfields Coalition

Status: active coalition

Since 2014, Metro has led the statewide Oregon Brownfield Coalition, a group of more than 50 public, private, and nonprofit organizations. The mission of the coalition is to advance the cleanup and reuse of brownfields to improve the environment, economy, and health of communities across Oregon. The coalition has successfully advocated for legislation to support brownfield remediation.

Build Small Coalition

Status: active, but not longer convened by Metro (now convened by DLCD)

The Build Small Coalition was originally convened by the Oregon Department of Environmental Quality and focused on the waste reduction benefits of smaller format housing. At DEQ's request, Metro took over convening this group for several years. Under Metro's leadership, the coalition's focus shifted towards the affordability and land use efficiency of smaller format housing. Under Metro's leadership, the coalition completed an audit of local zoning codes related to accessory dwelling units, organized middle housing tours, hosted guest speakers, and held two Build Small, Live Large Conferences. In recent years, as the state became more active in middle housing topics, the Department of Land Conservation and Development took over convening the consortium.

HUD Sustainable, Livable Communities Coalition

Status: inactive

Metro filled a convener role in organizing a regional consortium to submit Sustainable, Livable Communities grant proposals to the U.S. Department of Housing and Urban Development in 2010 and again in 2011. The coalition was not awarded a grant either year. The proposed work would have included opportunity mapping, regional analyses of impediments to Fair Housing, community capacity building, refinements to regional housing needs analysis methods, a pilot program to explore Section 8 voucher portability across the three-county area, and the development of regional housing strategies.

Attachment 1: Functional Plan Title 7 historic context

Voluntary housing goals and initial reporting requirement

In a settlement to a challenge on the 1997 Urban Growth Management Functional Plan relating to inclusionary housing, the Oregon Land Use Board of Appeals mandated that Metro convene a task force (the Affordable Housing Technical Advisory Committee or HTAC) to develop a Regional Affordable Housing Strategy. Based on the work of this group, Metro adopted an ordinance in 2000, amended in 2002, which required local jurisdictions to consider actions that would promote affordable housing and a voluntary affordable housing production goal for five years 2001 - 2006. Those voluntary goals can be found in Title 7. Local jurisdictions were required to submit progress reports over the next few years to Metro.

Progress reports 2002 - 2005

About half of the local jurisdictions submitted progress reports in the timeframe specified in Title 7. All but two eventually submitted reports, though they were abbreviated. The results of these progress reports were summarized in the 2004 compliance report (released by the Council in early 2005) and then summarized again in a memo to MPAC in 2006. As the compliance report indicates, few cities adopted the voluntary housing goals. Though many jurisdictions considered actions to promote affordable housing, few adopted them.

New Housing Choice Task Force: 2006 recommendations

As required by Title 7, Metro reconvened the housing Task Force in 2005. In 2006, MPAC and Council endorsed the recommendations from the Task Force, which called for Metro and the region to take a variety of actions to promote housing. When Title 7 was amended, MPAC and Council voted to retain the voluntary housing production goals and amended the text to indicate that the goals would be amended over time and to continue reporting requirements for local jurisdictions on affordable housing production.

Title 7 progress reports suspended in 2007

Within a year of the adoption of the new Title 7, after review and discussion at Council, the Metro Chief Operating Officer suspended Title 7 reporting requirements. This was based on the experience that the reports were not providing consistent information, were a burden to local jurisdictions, and were not helping result in getting more housing built. The suspension was intended to allow Council to reconsider the role of these requirements. Today, the voluntary affordable housing production targets for the 2001 to 2006 period are considerably out of date. Because the state now sets housing targets for local jurisdictions under the OHNA program, there is not a clear rationale for Metro establishing updated production goals, which would likely add confusion to the OHNA program.

Appendix 6: Equitable engagement summary

Engagement overview

The engagement approach for developing Metro's RHCS focuses on outreach and coordination with many individuals, governments and organizations from across the region. These efforts have centered on understanding barriers to housing production and equitable access and collecting ideas from a variety of perspectives about what Metro can do to fill regional gaps and support local work. The aim of this outreach was to foster stronger relationships with our partners and to create an impactful strategy that can be feasibly implemented over the next six years.

Engagement goals and objectives

- The strategies in Metro's RHCS are informed by barriers and needs identified by jurisdictions and housing advocacy groups and experts in the region.
- Existing programs and information available at Metro are lifted up and built upon in the strategies.
- Collaborative engagement leads to a regional strategy that is responsive to the OHNA mandate and spirit of promoting housing production and choice for all community members in our region.
- Engagement activities facilitate new connections, relationships and points of coordination between entities working to meet housing needs across the region.
- The engagement process for Metro's first ever RHCS informs the resources and approaches for future RHCS cycles so that it becomes integral and valuable to all entities in the region working to meet housing needs.
- Following the creation of the RHCS, the project team will reflect on project outcomes, identify areas for improvement and set up the next RHCS for success.

Key engagement phases and topics

Several phases of engagement encompassed the development of the RHCS. The primary intent of these phases was engaging with jurisdictional staff implementers, practitioners, advocates, service providers, and housing professionals with firsthand experience of the challenges in the region to hear their perspectives and ideas for meaningful and impactful actions for Metro to take. Not every engagement phase was a discrete amount of time. Many conversations covered several topics together and interrelated feedback was compiled across the engagement activities and over several months to influence the final RHCS.

The primary outcomes of the engagement activities were:

- A list of barriers to housing production and access

- A list of actions for Metro to take to promote housing production, affordability, access, and choice (the full list of action ideas can be found in Appendix 7)
- An evaluation framework to assess each action's impact on housing preservation and production, impact on affirmatively furthering fair housing, and organizational impact on resources and implementation feasibility.

Phase 1: Pre-scoping research and project preview (October 2024 – February 2025)
During the initial phase of the project, the project team focused on conducting foundational research and early outreach to shape the scope of work and engagement plan. This work included a review of existing Housing Production Strategies (HPS) that identify Metro as an implementation partner and interviews with several local jurisdictions to hear initial thoughts about the RHCS and gauge interest in future engagement. Additional interviews with partner organizations centered on assessing interest in participating in the RHCS development and gathering early input on how the strategy might support their ongoing housing efforts.

Additionally, staff reviewed key findings from recent engagement efforts conducted as part of Metro's housing work, including Permanent Supportive Housing and Supportive Housing Services Implementation Engagement, Affordable Housing Investment Opportunities Community Engagement, and Affordable Housing Investment Opportunities Technical Engagement (see Appendix 6 for summaries of these engagement efforts). This scan of recent Metro housing engagement helped inform the RHCS engagement plan by building on and leveraging relevant information and insights already shared by key industry stakeholders and experts.

Activities:
- Pre-scoping research and interviews
- MTAC meeting #1
- MPAC meeting #1

Phase 2: Scope of work and engagement plan (February 2025 – April 2025)
Following pre-scoping research, the project team presented the proposed scope of work and engagement plan to a range of advisory and oversight bodies, including the Metro Council, the Committee on Racial Equity (CORE), Metro Policy Advisory Committee (MPAC), and Metro Technical Advisory Committee (MTAC). Additionally, an internal cross-departmental work meeting was convened to introduce the project more broadly within Metro. Staff reviewed the agency's existing efforts to support needed housing development, identified any gaps in that work, and began collecting preliminary ideas for strategies that could be incorporated into the RHCS. During this stage of engagement, the project team began to receive requests to present this work to outside groups such as the Washington County Planning Directors and 1000 Friends of Oregon. Responses to these requests resulted in additional opportunities to present this project and receive feedback.

Activities:
- Metro Council work session #1
- CORE meeting #1
- MTAC meeting #2
- MPAC meeting #2
- Internal cross-departmental Metro staff meeting #1

- Washington County Planning Directors meeting
- 1000 Friends of Oregon Land Use Leadership Initiative meeting
- Project web page created

Phase 3: Metro's roles in housing production, coordination, and access and barriers to meeting housing needs (April 2025-July 2025)

In this phase of engagement, the engagement events focused on understanding the specific barriers to housing production and access across the region and summarized these barriers into three categories – regulations and systems, market and financing, and equity and housing choice. Additionally, participants were asked to share their perspectives on the importance and impact of Metro's various housing-related roles on their own work and discuss which areas they would like to see continued investment in the future. Some of these conversations fed into new ideas for Metro to consider as part of the ongoing list of brainstormed actions. A key goal of this phase was to better understand how regional efforts can complement and support local housing initiatives through tools, capacity building, funding, convening, and other mechanisms.

An online survey tool was created during this period to provide a participation method for people who were invited to some of these meetings but who couldn't attend. Feedback from that survey was combined with information collected during meetings.

Activities:

- Implementers Work Group meeting #1
- Clackamas County Coordinating Committee meeting #1
- Coalition member meeting: Oregon Smart Growth
- Coalition member meeting: Housing Oregon (an industry group of organizations that build, finance, and support affordable housing)
- Coalition member meeting: Home Building Association
- Focus group: Housing advocacy and provider coalitions
- Focus group: Development and financial professionals with experience in innovative approaches to affordable housing outside of Low-Income Housing Tax Credits (LIHTC)
- Focus group: Urban Native community-based organizations
- Metro Council work session #2

Phase 4: Preliminary list of actions and draft evaluation framework (May 2025 – July 2025)

Building on earlier engagement, this phase involved collecting ideas for specific actions that Metro might take to support housing production, affordability, and choice. These actions were considered through the lens of Metro's unique capabilities and responsibilities, with a focus on what is feasible and well-aligned with existing regional efforts or a new work program that would meaningfully address unmet needs. The feedback gathered during these activities also informed the development and refinement of an evaluation framework to filter and sort proposed actions.

Activities:

- Internal cross-departmental Metro staff meeting #2
- Implementers Work Group meeting #2
- MTAC meeting #3
- MPAC meeting #3
- CORE meeting #2

- Washington County Coordinating Committee (WCCC) and WCCC Transportation Advisory Committee

Phase 5: Evaluated, shortened list of actions and additional information about priorities (July 2025 - August 2025)
These engagement events shared results of the evaluation process and sought feedback on the resulting list of prioritized actions. The goal of this phase was to identify the most widely supported actions across the groups of stakeholders and continue to add details to the resulting "short list" to capture potential tradeoffs based on project budget and staffing impacts. Feedback during this engagement phase helped clarify community, jurisdictional, and internal priorities ahead of the public comment period.

Activities:
- Implementers Work Group meeting #3
- MTAC meeting #4
- MPAC meeting #4
- Metro Council work session #3

Phase 6: Draft RHCS, public comment period, and preparation for adoption (September 2025 – December 2025)
The final phase of the project will focus on drafting the RHCS and preparing it for adoption. A public discussion draft will be published in September to kick off the public comment period to gather any final input on the draft strategy. The discussion draft will be shared with all of the organizations and individuals that participated in the process, as well as appear on the project web page for comment. This feedback, along with any final comments from MTAC and MPAC will be incorporated into the final version of the RHCS. Staff will present a final document to the Metro Council for approval by the end of December 2025.

Activities:
- Implementers Work Group meeting #4
- Public comment period
- Share project information at Housing Oregon Conference
- Washington County Coordinating Committee (WCCC) and WCCC Transportation Advisory Committee (TAC)
- Clackamas County Coordinating Committee (C4)
- MTAC meeting #5
- MPAC meeting #5
- MTAC meeting #6 – recommendation of final strategy to MPAC
- MPAC meeting #6 – recommendation of final strategy to Council
- Metro Council work session #4 – receive committee recommendations
- Metro Council meeting to pass Resolution to adopt the final RHCS

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Pre-scoping research and interviews

Purpose: Pre-scoping engagement activities serve two primary purposes. The first is building an in-depth understanding of recent housing needs and production work in our region. The second is to inform the scope of work and engagement strategy for the development of the RHCS, building on what jurisdictions in the region have already done as a part of completing their Housing Production Strategies and what Metro has done in recent housing engagement efforts. This inventory will help to prevent over-engaging or burdening interested groups and community members and identify opportunities to add to the ongoing conversations and find places to fill gaps and add value. The project team will use lessons learned from pre-scoping activities to inform the engagement approach and begin an inventory of existing barriers to housing production and access and preliminary ideas for potential strategies.

Approach

To establish a baseline understanding of housing production work in the region, Metro began pre-scoping work by conducting interviews with staff from the cities who have completed their Housing Production Strategies (HPS) as of fall 2024 (Portland, Beaverton, Milwaukie, Gresham, and Hillsboro). Beyond speaking to staff directly, the project team also scanned the completed HPS documents to inventory actions that identify Metro as a potential implementation partner.

Additionally, the project team spoke to a few organizations that have been historically involved with housing legislature and rulemaking to gauge interest in participating in the development of the RHCS and to hear a few preliminary ideas for actions Metro could take as a part of this work. Community Visions and 1000 Friends of Oregon provided initial ideas such as a focus on better messaging and public outreach around the benefits of affordable housing and the creation of a listing service so community members with disabilities could be better matched with available accessible homes.

The Housing Department has led many housing engagement efforts over the past few years as a part of their work portfolio managing the Affordable Housing Bond and the Supportive Housing Services funds. Three different bodies of engagement were reviewed for key findings that could be carried forward into the work being done for the RHCS – Permanent Supportive Housing and Supportive Housing Services Implementation Engagement, Affordable Housing Investment Opportunities Community Engagement, and Affordable Housing Investment Opportunities Technical Engagement. This work provided a substantial amount of information related to existing barriers to housing access and included many ideas for Metro to take to continue to meet needs for high-quality, affordable housing.

Throughout 2024, an Urban Growth Report roundtable made of a wide variety of industry, government, elected officials, and community members met to discuss key elements of the Urban Growth Management decision. Several meeting topics involved future housing production and demand. The group generated a list of development barriers and several ideas for actions Metro could take like renewing funding for affordable housing, coordinated legislative advocacy, and increasing regional support for local planning efforts. This information was integrated into the ongoing list of barriers and action ideas as the starting point for development of the RHCS.

Key takeaways from research and interviews

1. Role clarity and coordination
    - Interviewees point to Metro's potential as a regional convener and facilitator of coordination between jurisdictions, agencies, and stakeholders to align strategies and efforts.
    - Need for Metro to provide clearer guidance on coordination and alignment, act as a central clearinghouse for resources, and convene forums for shared learning and strategy development.
    - *Connection to scope of work and engagement plan*: Metro's potential as a regional convener and facilitator of coordination between jurisdictions, agencies, and stakeholders to align strategies and efforts

2. Affirmatively Furthering Fair Housing
    - Gaps in knowledge/expertise from planners, consultants and lack clarity from State in addressing Affirmatively Furthering Fair Housing (AFFH) requirements in HPS development process and implementation.
    - Need for greater focus on fair housing strategies, including analyzing displacement risks, addressing need for accessible housing, and promoting equity and access to high opportunity.
    - Barriers to housing access identified by jurisdictions include language discrimination, credit/screening requirements, and accessibility issues.
    - Desire for strategies prioritizing marginalized communities, addressing housing affordability for middle-income households, and preserving existing affordable housing stock.
    - *Connection to scope of work and engagement plan:* Need for greater focus on fair housing strategies, including analyzing displacement risks, addressing need for accessible housing, and promoting equity and access to high opportunity

3. Community and partner engagement
    - Importance of broad and inclusive engagement in developing housing strategies, including voices from marginalized groups.
    - Value of storytelling and effective communication to build public support and awareness about regional housing challenges and successes.
    - *Connection to scope of work and engagement plan*: City staff and partner organizations have limited capacity but are interested in supporting/participating in RHCS development process. Cities and partner organizations shared interest in convening at a regional level for shared conversations and learnings. Ideally, the engagement process is mutually beneficial for Metro and organizations that choose to be involved.

4. Innovative and collaborative approaches
    - Some cities experiment with innovative partnerships, like Gresham's participation in NYU's Housing Solutions Lab.
    - Need to align housing efforts with other regional goals, such as climate-friendly development and equitable transit-oriented development.
    - *Connection to scope of work and engagement plan:* Metro has a potential role in fostering collaboration among developers, providers, and jurisdictions to address shared challenges.

5. Funding and resource challenges
    - Persistent barriers due to insufficient funding for housing initiatives, particularly for affordable housing production and implementation.
    - RHCS provides opportunities to explore regional funding mechanisms, such as bonds, grants, tax incentives, land banking, and revolving loan funds.
    - Project perception as an unfunded mandate.
    - *Connection to scope of work and engagement plan:* Potential Metro role in helping cities secure funding by streamlining processes, advocating for resources, and sharing information on available opportunities.

6. Regulatory and policy opportunities
    - Several interviewees expressed a need or opportunity for stronger mandates or incentives to align equitable land use and housing policies from Metro, such as Title 6 and CFEC (climate friendly and equitable communities) rules.
    - OHNA creates opportunities to promote redevelopment and infill, especially in high-opportunity areas.
    - Interest in reforming zoning laws to facilitate housing conversion and production.
    - *Connection to scope of work and engagement plan:* Implementers work group can be used to share resources and ideas that have been tried at the local level and lessons learned. The RHCS can identify opportunities to align policies and programs to be better coordinated across the region.

7. Regional capacity and expertise building
    - Limited staff capacity in cities for housing-specific planning; most jurisdictions lack dedicated housing planners.
    - *Connection to scope of work and engagement plan:* Convene forums for shared learning and strategy development and ensure that the engagement process is mutually beneficial for Metro and city or partner organizations.

8. Long-term visioning
    - Emphasis on aligning housing strategies with broader regional goals, including sustainability, equity, and economic growth.
    - Desire for Metro to play a proactive role in legislative advocacy, infrastructure funding, and regional visioning for housing production and affordability.
    - *Connection to scope of work and engagement plan:* Important area for Metro internal staff focus group discussions – how do we see our individual bodies of work aligning under this project? Are there ways the RHCS can leverage work Metro is already doing?

9. Strategy planning and implementation
    - Interviewees saw challenges with state's long-term accountability and tracking progress beyond the initial phases of implementation.
    - Align RHCS with local implementation efforts so that the strategy is complementary and supportive to local plans to streamline housing production efforts.
    - Identify accountability mechanisms for meaningful impact.
    - *Connection to scope of work and engagement plan:* HPS and RHCS work often start with internal conversations but require broader community engagement and

cross-departmental collaboration. RHCS should focus on actionable and realistic strategies, ensuring feasibility within funding, capacity, and political constraints.

Recommendations for Metro

- Act as a central coordinator and resource hub for housing planning/production efforts. Increase role as a centralized clearinghouse for resources.
- Provide training and technical assistance to address capacity and expertise gaps in local jurisdictions, especially around AFFH.
- Metro can support long-term capacity-building through providing technical assistance to city/county partners, education programs/cohorts, and partnerships with universities or training institutions.
    - Interest in creating a pipeline for housing planning expertise (e.g., internships, targeted education initiatives).
- Advocate for sustainable funding sources and facilitate access to regional and federal funding.
- Align new housing efforts with existing regional goals, such as climate-friendly development, equitable TOD, and regional housing/SHS governance
- Enhance communication and messaging around housing challenges and solutions to build public and stakeholder support. Explore messaging reform and tested communication strategies to dispel stereotypes around affordable housing.
- Convene regular forums for knowledge-sharing and strategy alignment across jurisdictions.
- There are significant data gaps at regional level. Opportunity to use DRC as regional resource for data and analysis (e.g. tracking displacement at regional level, tracking availability of accessible units, mapping segregation, producing regional housing production affordability trends analysis, etc.)

Implementers Work Group (IWG)

Purpose:
Metro hosted four discussions with jurisdiction staff from the cities and counties in the region required to create a Housing Production Strategy. Both housing and land use planning staff were invited to participate and share their experiences of barriers to housing production and access and their thoughts about the most valuable roles Metro can play to support their local efforts. The final meetings will focus on reviewing the evaluation approach, prioritizing the evaluated list of actions, and discussing the final draft RHCS.

Approach:
Meeting #1 – project background, goals and scope of work; discussion of barriers to housing production and access; prioritizing Metro's roles in housing work; preliminary discussion of action ideas, April 18, 2025

- The Implementers Work Group called out funding and investment, technical assistance, and data and analysis as the top three roles for Metro to support their housing work at the local level
- The remaining categories of partnerships and collaboration, convening, communication and public engagement, and best practices and research received generally positive feedback and were acknowledged as other important pieces of Metro's role in the region.
- The only role to receive negative feedback through this engagement stage was regulation and regional policies, as many groups did not want to see additional requirements as an outcome of the strategy.
- Preliminary action ideas – convening funders, housing bond for more funding, land banking, developer partnerships, technical assistance and sharing housing expertise

Meeting #2 – Review the draft evaluation framework; providing feedback on improvements; further discussion of action ideas, May 16, 2025

- The project team presented the draft evaluation framework to the group and explained the proposed approach to scoring each action based on three categories – organizational impact, impact on housing production, and affirmatively furthering fair housing (AFFH)
- Discussion focused on ensuring the evaluation framework reflects regional priorities and addresses the needs of jurisdictions
- The members of the IWG provided valuable feedback, encouraging the project team to remove numeric scoring from the impact on housing production and AFFH categories so action effectiveness could be better differentiated
- New criteria were suggested, like one to represent an action that directly supports jurisdictions' abilities to meet their own housing production strategy creation and implementation and another to measure how an action improves regional outcomes around housing production, accessibility, affordability, and AFFH
- Overall, the feedback encouraged a focus on operational considerations and impact to initially score and sort the actions, and then to focus on understanding the range of actions that would be needed, in combination, to achieve all objectives around housing production and AFFH

Meeting #3 – Review of final evaluation approach; prioritization of evaluated list of actions, June 27, 2025

- The project team presented the revised, final evaluation framework and highlighted the changes that were made based on the IWG feedback from the previous meeting.
- Members of the IWG confirmed that the edits to the evaluation approach reflected their feedback from the second meeting and made sense to use moving forward.
- After presenting the shortened list of actions based on evaluation, the group ranked their top priorities
- The top 10 actions selected by the group:
    1. New affordable housing bond
    2. SDC assistance fund
    3. Local HPS implementation funding and support
    4. Regional land bank plan
    5. Housing predevelopment and technical assistance
    6. Coordinated housing legislative agenda
    7. Evaluate alternative models for affordable housing financing
    8. Regionally available pool of housing professionals for technical assistance
    9. Expand funding for the brownfield grant program
    10. Alternative home ownership opportunities

Meeting #4 – Review the final package of proposed actions and the overall draft RHCS, September 19, 2025

- The project team presented a recap of all Implementer Work Group meetings and described how their feedback influenced the development of the RHCS, from brainstorming the list of actions to proposing changes to the evaluation approach.
- Participants reviewed the final proposed list of actions and discussed four questions:
    - Is anything critical missing?
    - Do any actions still seem unclear?
    - What actions, once taken, will be most impactful for your jurisdiction?
    - What could implementation look like locally?
- Overall, there was a shared sentiment that the proposed RHCS met the group's expectations and was an appropriate representation of actions that Metro is well suited to take to fill gaps on a regional scale.
- Members appreciated specific actions that would help smaller jurisdictions with less housing staff and highlighted the importance of the coordinated legislative agenda and a future housing bond.

Participants representing the following jurisdictions:

- Beaverton- housing and planning staff
- Cornelius
- Fairview
- Forest Grove
- Gladstone
- Gresham- housing and planning staff
- Happy Valley
- Hillsboro- housing and planning staff
- Lake Oswego
- Milwaukie
- Oregon City
- Portland- housing and planning staff
- Sherwood
- Tigard
- Troutdale
- Tualatin
- West Linn
- Wilsonville
- Clackamas County
- Multnomah County
- Washington County

- Housing Authority of Clackamas County
- Washington County Housing Authority
- Oregon Department of Land Conservation and Development

Coalition member meetings and focus groups

Purpose:
Coalition engagement and focus groups provided targeted input from key stakeholders to help shape the RHCS. Participants explored the practical implications of proposed RHCS actions, offered insights into sector-specific barriers and opportunities, and ensured diverse perspectives are reflected in the final strategy.

Approach:
The project team attended six different coalition meetings and focus groups depending on organizational availability and needs. Despite differences in format, each meeting had the same shared goals - understanding barriers that different groups face related to housing affordability, production, and access, and hearing a wide variety of ideas about actions that Metro could take to support their work and fill regional gaps.

Housing Oregon coalition member meeting and survey
To confirm the findings and takeaways from the pre-scoping research about affordable housing and to hear new ideas about barriers and actions, the project team attended a Housing Oregon member meeting to present an overview of the RHCS and invite comments about each organization's perspectives and needs as they relate to the goals of the strategy.

Since the presentation time at the meeting was brief, the team shared a survey with members to capture their feedback on similar topics that were discussed during longer focus group events to ensure that these organizations had the same opportunities to communicate their needs and share their ideas. The intent was to give time for representatives to think through their priorities, discuss with their broader organization as needed, and provide information that was aligned with the qualitative responses from other events. Overall, 27 responses were gathered from representatives of public, private, and nonprofit affordable housing development and finance organizations.

Survey questions:

1. What organization do you represent?
2. Does your organization identify as a culturally-specific developer or service provider?
3. What community (or communities) do you primarily work with?
4. Which of the following best describes your role at your organization?
5. Metro has filled many roles, in the past and present, when it comes to housing production, coordination, and access. Please rank the roles that you think are most critical to support your work, now and in the future:
    - Regulation and regional policies
    - Research and innovation
    - Communication and engagement
    - Legislative advocacy
    - Convening
    - Technical analysis and capacity building
    - Funding and investment
    - Data and analysis
    - Partnerships and collaboration

6. Within the space of funding and investment, what actions do you think Metro should consider taking to advance housing production, affordability and choice? Please provide up to five ideas that you think Metro should consider including in the plan. You could draw from this list or provide new ideas not listed below.
    - Pass a new housing bond to fund the creation and preservation of regulated affordable housing
    - Create an implementation plan for a regional land bank
    - Develop a coordinated strategy for investing in acquisition and preservation of "naturally occurring affordable housing"
    - Evaluate models and develop recommendations for alternative affordable housing financing and ownership models that could complement LIHTC/gap funding approaches (e.g. social housing, community land trust, resident-owned cooperatives)
    - Leverage Metro's 2040 planning and development grants to fund predevelopment planning for affordable housing
7. Outside of funding and investment, what actions do you think Metro should consider taking to advance housing production, affordability, and choice? Please provide up to five ideas that you think Metro should consider including in the plan. Below are some examples of ideas we've heard through engagement to date. You could draw from this list or provide new ideas not listed below.
    - Develop a proposal to create a regional consortium for buying materials or services needed to create housing at scale
    - Conduct research, convene partners, and develop an action plan for scaling mass timber, modular construction, and other innovative building methods
    - Expand Metro's Construction Career Pathways Program to address housing construction labor shortages
    - Map parcels that may provide housing development opportunities including public ownership, non-profit or faith-based ownership, location for use of SB8
    - Create a regional listing service for affordable housing units that includes information about availability, rent, income requirements, accessibility, and more
    - Work with county partners to improve regional portability of tenant-based long term rental assistance
    - Convene city/county staff and subject matter experts for ongoing "community of practice" conversations on topics such as clarifying codes and reducing permitting burdens for developers
    - Provide fair housing training and technical assistance to local jurisdictions and/or housing providers and property managers
    - Convene jurisdictional and industry partners to develop and lead a coordinated regional housing advocacy agenda for state and federal policy and resources
    - Develop a proposal for how to condition Metro's transportation and parks funding on jurisdictions' housing production performance as evaluated by DLCD
8. Are there any additional thoughts you'd like to share about this project?

Key takeaways from Housing Oregon coalition members via survey results:

A majority of respondents listed Metro's role in funding and investment as "highly critical" for their organization's work. Roles related to data and analysis, technical assistance and capacity building, and partnerships and collaboration were ranked as "somewhat critical."

Funding-related action ideas included:

Bonds, grants, and loan funds

- Pass a new housing bond to finance creation and preservation of regulated affordable housing (acquisition, predevelopment, reserves, pooled operations).
- Issue green bonds
- Deregulate funding to flexibly address housing insecurity and homelessness.
- Launch a regional first-generation and first-time homebuyer Down Payment Assistance Fund.
- Establish a capital improvements pool for long-term property needs.
- Create low- or no-interest loan programs to support property acquisition, predevelopment, and innovative construction methods (e.g., 3D printing).
- Fund a Regional Predevelopment and Pipeline Support Program with flexible loans and grants.
- Provide direct financial support to community-based owners and developers, ensuring stronger coordination of SHS funds for deeper affordability.
- Create a dedicated fund for PHAs or tribes to exercise right-of-first-refusal on expiring affordability properties, seeding social housing inventory.
- Support acquisition funds that enable rapid conversion of market-rate housing into affordable homes.
- Introduce insurance subsidies to reduce operating costs and support long-term sustainability.

Land acquisition and land banking

- Develop and implement a regional land bank plan, using Clackamas County's model as a starting point.
- Collaborate on land acquisition for homeownership projects with OHCS LIFT funding.

Partnerships and coordination

- Partner with nonprofit service and housing providers to engage philanthropy for housing services, rent subsidies, and organizational capacity building.
- Coordinate with housing authorities across counties to ensure sufficient rent subsidies for very low-income tenants.
- Advocate for Metro to receive its state funding allocation directly, streamlining local distribution and reducing project delays.
- Establish a Metro Housing Counseling and Homeownership Center Network to guide buyers and funnel them into DPA programs.

Policies and regulations

- Fine-tune and expedite land-use and regulatory processes to accelerate affordable housing development.
- Advocate YIMBY regulations to allow greater density and eliminate restrictive zoning controls (height limits, setbacks, lot sizes).
- Protect existing resources (like SHS), require better coordination with affordable housing, and include nonprofit providers early in predevelopment.

Innovation

- Shift from rigid, bureaucratic approaches to rapid, risk-taking actions that lower costs and speed unit creation.
- Invest in construction innovations (e.g., 3D printing) and expand career pathways to address labor shortages.

Action ideas outside of funding included:

Land identification and site readiness

- Map public, nonprofit, and faith-based parcels for housing development (including SB8 uses).
- Launch a Regional Faith and Nonprofit Land Mapping & Technical Assistance Initiative.
- Study and support land-banking approaches; convene jurisdictions and faith partners to repurpose surplus land.

Policy, regulations and collaboration

- Form a cross-departmental/agency committee (local, state, Metro) to set rules and align funding for affordable housing.
- Clarify and streamline the roles of all jurisdictions on housing and homelessness to reduce redundant planning tables.
- Establish a Regional Anti-Displacement Policy Lab
- Create consistent thought leadership space (beyond elected officials and policy staff) to chart a shared theory of change on how we approach the crisis
- Advocate for YIMBY deregulation and work with jurisdictions to address NIMBYism locally.
- Condition Metro's transportation and parks funding on jurisdictional housing-production performance, as evaluated by DLCD.
- Convene a regional consortium to leverage bulk purchasing for cost savings.

Property management and supportive housing services

- Provide targeted training, certifications, and regional standards; learn from other states' property managers.
- Fund and structure programs to support permanent supportive housing operators, including mentorship from high-performers.
- Include nonprofit housing service providers in conversations about regional rent assistance portability.
- Support the creation of mission-based, client-centric property management companies (for-profit or nonprofit).
- Pair rent vouchers with nonprofit providers or limited-equity co-ops to minimize pass-through to for-profits and invest in people.
- Curb out-of-state, profit-driven developers and level the playing field for community stakeholders.
- Design a scalable regional plan to increase production, reduce homelessness, and prioritize high-impact initiatives.

Information and innovation

- Create a single, Metro-managed website or portal (like Housing Connector) listing all affordable units and linking renters to property managers.
- Build a culturally specific affordable-housing locator and intake portal.
- Research populations in need to align new housing models and quantify the real production and affordability impacts of proposals.
- Conduct an action plan for scaling mass timber, modular construction, and other innovative building methods.
- Explore free financial training and wealth-building coaching to expand low-income households' investment channels beyond homeownership.

Market rate developers – coalition member meetings
Three separate engagement events focused on hearing from market rate developers across single unit and multi-unit housing types.

Home Builders Association

- The Metro project team co-hosted a two-hour focus group with 14 members of the Home Building Association (HBA) at their offices. This time allowed for a robust discussion about barriers to housing production, priorities around Metro's roles in housing, and ideas for actions to include in the RHCS.
- First, the group reviewed a list of barriers to housing production and access from previous engagement. Additions were made around process inefficiency and inconsistency, expensive fees, public participation, and regional perceptions of growth.
- HBA members noted that Metro could play a stronger role in legislative advocacy to continue to advocate for better policies and more resources at the state and federal level. Metro's roles providing funding and investment and technical assistance and setting regional policies were also selected as priorities for this group.
- This group coalesced around a popular idea to create a permitting and production dashboard to track regional progress towards housing targets.
- At a follow-up meeting with the government affairs group, a new idea was suggested to audit middle housing codes and policies throughout the region to better understand what approaches have been the most effective in producing needed housing.

Oregon Smart Growth

- At an Oregon Smart Growth member meeting, the project team presented an overview of the RHCS and asked members to share their experiences with barriers to housing production and to suggest ideas that Metro could take as a part of the RHCS.
- Barriers cited during the discussion:
    - Negative perceptions of the greater Portland area hurt our access to financing
    - Economic development barriers – high taxes, homelessness and safety, lack of foot traffic downtown
    - Pre-development takes too long – can Metro cut through the permitting process to speed things up?
    - Too much regulation – zoning inflexibility
- Ideas for possible actions included:

    - Acquiring existing housing instead of new construction
    - Balance carrots and sticks
        - Metro could reward cities who are making progress – more funding for housing production success
        - Withold funding for visioning, transportation, other grants, for cities that are not meeting production goals
    - Address production of all housing – don't focus on just affordable housing
    - Research messaging – how to talk about growth as a positive thing
    - Metro needs to plan for all urban reserves

Focus group with development and financial professionals with experience in innovative approaches to affordable housing outside of Low-Income Housing Tax Credits (LIHTC)
Focus group participants included representatives from the following organizations:

- Related NW
- Edlen & Co
- Community Development Partners
- Central Bethany Development
- Network for Oregon Affordable Housing (NOAH)
- ECONorthwest

Following an overview presentation of the project goals, deliverables, and timeline and Metro's role in housing, the group discussed opportunities for innovative financing for affordable housing development beyond Low-Income Housing Tax Credits (LIHTC).

- What are some models (local, national, or global) that have successfully expanded housing supply at different affordability levels?
    - Create a recycled bond program that would allow for more tax-exempt debt for non-LIHTC deals (look to California and Washington for existing models)
    - Example of trying a new strategy to support middle income housing – create a mixed income project that is a public-private partnership. In Euguene, there is a project where 50% of units are at 80% AMI levels and the rest are at market rate. There was a way to provide public money in the deal without triggering prevailing wage requirements (cities may be in a position to provide $1 million to a project, but that same project would need $5 million if prevailing wages apply).
    - Create a 501c3 whose mission is to own and develop and operate middle-income housing up to 140% of AMI. If the non-profit owns the housing, you can use 100% tax exempt bond financing at the upper limit of those rents.
- How could Metro support efforts to expand innovative housing models? What approaches could help bridge financing gaps for projects that fall outside traditional funding models? What types of partnerships or collaborations could Metro foster to advance innovation in housing? How can Metro's research and data capabilities be leveraged to support the development and scaling of new housing strategies?
    - Middle income or moderate-income housing is a big missing piece right now because it is not economically viable. Find a way to subsidize these units event if they are for higher income people – the subsidy will be shallower.
    - Provide credit enhancement for 6% bonds to help with financing gaps
    - Advocate for changes to BOLI – the $750,000 threshold for prevailing wages is 25-30 years old. Today, that amount equates to a small project and with inflation would be more equivalent to a $3 million project today.

- Build up a land bank and feed it into projects
- Continue to provide project-based vouchers. They are an efficient tool to provide affordability at scale, but are very expensive and in-perpetuity.
- Respond to challenges and changes more quickly. Solutions need to be bigger in order to make a significant change. All the efforts of the State and Metro and local jurisdictions should be coordinated.
- Create a Metro loan program for missing middle-income housing.
- Stay flexible when writing new bond language to avoid limiting how funds can be used. Stay streamlined and simplified – don't add too many bells and whistles.
- Track the inventory of housing being produced and coordinate with the State to identify necessary interventions
- Create an operational stabilization or remodel program.

Housing advocacy and provider coalitions – focus group
A dedicated focus group with representatives from a broad range of housing advocacy and service provider coalitions was convened for participants to share their experiences with barriers to housing access and affordable housing development and to suggest ideas that Metro could take as a part of the RHCS.

Focus group participants included representatives from the following organizations:
- Fair Housing Council of Oregon
- Welcome Home Coalition
- Here Together
- Coalition of Communities of Color
- Unite Oregon
- AARP

Discussion of barriers:

Operational strains
- Developments combining Permanent Supportive Housing (PSH) with affordable units often see low occupancy in the latter, eroding rent revenues and destabilizing operating budgets.
- Streamlining eligibility and reducing bureaucratic barriers will help fill affordable units and stabilize projects.

Service and delivery gaps
- Supportive services in PSH lack consistent, dedicated funding — too often they're unfunded mandates or expected to solve every resident challenge.
- Residents need more proactive, hands-on support than a referral card or hotline.
- Funders (OHCS, Metro, others) must mandate and finance resident support services within housing deals, and broaden eligible uses of credits and funding streams.

Partnership and capacity challenges
- Service plans drawn up during project bidding frequently fall apart by move-in, as the original proposers are no longer involved.
- Homelessness services and housing providers operate in silos, leaving tenants' housing and support needs disconnected.

- Providers lack the staff and bandwidth for ongoing social-cohesion efforts (weekly check-ins, peer specialists).
- Property management and social services require specialized, non-interchangeable roles.
- There's a critical need for trauma-informed property management practices.

Equity and fair housing
- Residents accessing homeless services face discrimination within the system.
- Housing policies and operations must center equity to ensure fair treatment and access.

Discussion of action ideas for the RHCS:

Preserve and convert existing housing
- Prioritize maintenance and repairs to keep current affordable units safe and functional.
- Use public funds to acquire private-sector properties for conversion to mixed-income housing or PSH.
- Collect and share best practices for preserving units with expiring affordability covenants.
- Establish a maintenance risk pool accessible to all property managers.

Reduce costs of homeownership
- Waive system development charges (SDCs) and fees to lower development costs.
- Promote innovative methods (mass timber, modular construction) and allow manufactured homes.
- Enable smaller lots and simple land divisions to expand entry-level homeownership.
- Launch programs helping renters become homeowners (down-payment assistance, shared-equity).

Funding and financial tools
- Tie bond and SHS dollars to deep, long-term affordability targets with cultural-competency and accessibility controls.
- Expand and sustain eviction-prevention funds and broaden rent-assistance eligibility region-wide.
- Create regional land banks in high-opportunity areas and direct land to affordable production.
- Support acquisition and predevelopment with low- or no-interest loans and flexible grants.

Embed community leadership and equity
- Require or incentivize community co-design in all publicly funded projects.
- Define "Affirmatively Furthering Fair Housing" to include co-governance, culturally specific services, and data equity.
- Mandate displacement-impact reports for new developments, with binding mitigation plans.
- Fund community-led research and engagement as part of fair-housing strategy.

Prioritize resident services

- Fully fund on-site resident services as an integral affordability component, not an add-on.
- Support landlord liaison programs to assist tenants and reduce evictions.
- Defer additional PSH or mixed-housing projects until a proven operational model is in place.

Focus group with urban Native community-based organizations
A final focus group with representatives from several organizations that serve urban Native community members in the region was held at the Metro Regional Center in partnership with the Tribal Affairs team. The group was asked to share their experiences with helping their community access housing and to share culturally responsive ideas that Metro could take as a part of the RHCS.

Focus group participants included representatives from the following organizations:
- Native American Youth and Family Center (NAYA)
- Native American Rehabilitation Association (NARA)
- Future Generations Collaborative
- Native Wellness Institute

Following a brief presentation about Metro's roles in housing and an overview of the RHCS goals and timeline, participants discussed the unmet housing needs in the communities they serve.

Permitting and flexible housing options
- Zoning and permitting must accommodate non-traditional dwellings (teepees, tiny homes) to meet diverse preferences.
- People on the spectrum often prefer standalone, small-scale units rather than large apartment complexes.

Trauma-informed environments
- Many supportive housing sites claim trauma-informed design, yet still pose challenges for residents.
- Healthy, sustainable materials, gardens, and gathering places support neural and generational trauma recovery.

Resident support
- On-site peer mentors or community health workers are essential — but hard to fund — to help residents with home maintenance, mental health, and addiction support.
- Projects should feature culturally resonant art, play areas, and gardens that welcome Native and other marginalized communities.
- All staff must understand and actively dismantle white supremacy within housing operations.

Financial considerations
- Traditional affordable-housing financing pressures projects to set rents too low or underfund resident services.
- Finance models need flexibility to serve out-of-state clients (e.g., NAYA) and ensure long-term quality property management.

- Grants and low-interest loans should cover both development and the full spectrum of resident supports.

Resident services and safety

- Service needs (mental health, peer support, cultural programming) consistently exceed available funding.
- Security must focus on culturally appropriate safety measures rather than enforcement—rethinking property security to be functional and welcoming

Community connection and engagement

- Housing designs should facilitate social cohesion and cultural practices, giving residents ways to connect with their heritage and community peers.

Participants then discussed ideas for priority actions related to Metro's roles in housing production, coordination, and access. Katie McDonald, Metro's tribal liaison, suggested Metro could help these organizations make a connection with local jurisdictions through implementation of the actions in the RHCS.

Creative solutions

- Establish a tiny-home village in Blue Lake Park, employing residents as park staff
- Replicate this model in other city parks to provide affordable homes and on-site jobs
- Prioritize smaller developments (10–12 units) for faster, community-oriented impact
- Collaborate with closing churches to acquire underused land for new housing stock
- Tie green construction to regional resilience and emergency preparedness goals

Collaboration

- Break down silos by partnering with municipal departments, non-profits, and volunteer networks
- Team up with groups like Housing Solidarity PDX to leverage community-driven homeownership programs.
- Advocate at the state level for housing projects that use environmentally sustainable materials (e.g., mass timber)

Culturally responsive solutions

- Donate land to establish Native-led neighborhoods as a form of reparations
- Increase production of housing that's culturally tailored and supportive for Indigenous and other marginalized communities

Additional presentations to regional organizations and committees

Purpose:
As information about the RHCS was shared to jurisdictional and community partners, some organizations requested additional presentations to their membership. The project team responded to each request which resulted in six additional meetings to share information and answer questions about the project, hear about barriers that each group was facing, and solicit ideas for potential actions.

Meeting list and feedback:
Washington County Planning Directors, April 3, 2025

- The project team introduced the RHCS and provided an overview of requirements and approach
- The group asked questions about the proposed scope of work and engagement plan
- Following the presentation, participants discussed barriers they face at the local level and suggested preliminary ideas for Metro to support local efforts
    - Providing regional level research about the past harms of discriminatory housing actions
    - Working to recruit developers with innovative housing ideas into the region
    - Seeing Metro more involved with state level rulemaking to represent the needs of the local jurisdictions
    - Addressing workforce shortages for building inspectors and other works in the housing pipeline

1000 Friends Land Use Leadership Initiative (LULI), April 19, 2025

- The project team introduced the RHCS and provided an overview of requirements and approach
- The group asked questions about the proposed scope of work and engagement plan

Clackamas County Coordinating Committee (C4 Metro Subcommittee), November 24, 2024, May 14, 2025, July 16, 2025, October 15, 2025

- The project team introduced the RHCS and provided an overview of requirements and approach
- The group asked questions about the proposed scope of work and engagement plan
- Following the presentation, participants discussed barriers they face at the local level
    - Barriers of the market – it can be hard to find developers to build what the jurisdictions are mandated to produce
    - Impression in the private development community that government gets in the way more than anything else
    - Infrastructure needs and other practical components of development are not sufficiently financed
- At the July meeting, members reviewed the preliminary list of evaluated action ideas and provided input related to their areas of strong support
    - Important role of Metro to convene jurisdictions and coordinate with transportation and jobs planning
    - Support for the ideas of land banking and meeting annually with Metro Councilors to discuss unique needs of each individual jurisdiction
    - Continue to find more ways to fund infrastructure

- A final update in October reviewed the proposed list of actions for adoption and highlighted preliminary public comment themes. Members flagged the need of many local jurisdictions for more capacity, both to implement new programs and incentives being passed at the state level and to work on planning efforts in their communities concurrently. Technical assistance and planning grants are important for smaller cities without dedicated housing staff and for larger cities who could still use help in accelerating their housing work and connecting to additional funds and programs.

Washington County Coordinating Committee (WCCC) and WCCC Transportation Advisory Committee, July 10 and July 14, 2025; October 2 and 13, 2025

- The project team presented an overview of the project purpose and a summary of the work that had been completed so far including engagement and evaluation. Participants heard about the highest scoring actions from the evaluation period and shared their thoughts and priorities.
- Overall, the group felt that their ideas were represented in the narrowed list and agreed with many of the actions that were supported in the Implementers Work Group and in MTAC, including the new affordable housing bond, funding for infrastructure, and supporting work happening at the local level.
- At the project presentation in October to discuss the proposed list of sixteen actions for adoption, some questions came up around clarifying Metro's roles in actions that support supportive housing services. Members wanted to ensure that actions would capture the diverse needs of the cities and their approaches to housing production and access in their local context. The discussion ended with some inquiries about data collection for permitting and brownfield sites. Otherwise, the groups were primarily supportive of the version of the final draft RHCS that was released in September for public comment.

Internal Metro staff work sessions

Purpose:
Metro hosted two discussions with internal staff to provide additional institutional context to the development of the RHCS and to ensure coordination and alignment with intersecting Metro projects and programs. Internal Metro staff experts shared their input on the list of strategies and the evaluation framework and provided additional insights to ensure the final action list reflects accurate budget and staffing impacts, identifies the right teams for implementation, and coordinates with ongoing work programs as needed.

Approach and feedback:
Meeting #1: Suggest potential actions and strategies; inventory of measures already implemented by Metro to promote the development of needed housing, March 11, 2025

- Staff from across Metro departments weighed in on the draft deliverable inventory of measures that Metro has taken to support housing production and equitable access
- The discussion transitioned to brainstorming ideas for the strategy based on expertise:
    - Embed historical due diligence activities in our work
    - Explore new regulations to require local jurisdictions to amend codes that are barriers to housing production
    - Provide more resources as incentives to implement best practices – like middle housing development, connections to 2040 grants
    - Metro can continue to provide a point of connectivity for jurisdictions and to facilitate everyone to learn from one another
    - Funding will be one of the biggest challenges in the coming years – role for Metro to convene funders regionally
    - Good possibility to implement land banking
    - Lowering the cost of production would allow for more housing to be produced using the same resources – connection to modular development or purchasing materials at scale. Could Metro help sponsor a collaborative insurance pool? Insurance cost is another huge barrier.
    - Labor shortages are preventing the region in reaching our goals – look at Minneapolis/St. Paul example and how we can enhance the construction to careers pathways program
    - Acquire existing market rate buildings and convert to affordable housing. Kind of a land banking strategy.
    - Use this process to build up agreement about levels of affordability amongst our jurisdiction partners. TOD program is doing great with proof of concept.
    - Has there been prior work to collect learnings around the strategies that advance racial justice? Will there be equity priorities? Seeing that there are 4 checkpoints in this process for the equity framework. Is there space to share that out with the engagement and wrap those learnings in an ending product.

Meeting #2: Review evaluation framework and full list of action ideas sorted by Metro's roles in housing, May 6, 2025

- The project team presented the proposed evaluation approach to the team for feedback

- Participants split up into four separate groups to review the running list of action ideas, sorted by the nine roles that Metro plays in housing work. The groups flagged ideas that needed more information, would be outside of Metro's scope of authority, or are duplicative to work being led by other organizations. Ideas that made sense for Metro to continue exploring were highlighted for evaluation.
- After some time working separately, the group came back together to discuss their primary takeaways with the rest of the attendees, focusing on answering these questions:
    - Do you have suggested edits to this preliminary list of strategies?
    - Do you have ideas for additional strategies, based on these categories of Metro's roles?
    - Where do you see challenges for feasibility or implementation?
- Key feedback:
    - Partnerships and collaboration – Some ideas need further explanation from the Implementers Work Group. Ideas about aligning partners around messaging is an opportunity for Metro to share more about our projects and success stories.
    - Best practices – Really need to consider if Metro is the right organization to implement each idea – do we have the right staff or expertise? Is another organization leading this work already?
    - Funding and investment – Many ideas are overlapping and related and some ideas are written more like a goal than as a strategy – opportunity to consolidate ideas and add more details. Add a new idea about improving voucher policies across the region.
    - Data and analysis – Idea to create indicator comparisons across metro regions nationally so we can compare our progress; idea to collect data of time series of certain indicators to understand how conditions have changed over time
    - Communication and engagement – Idea to convene standing working group of partners in the region focusing on housing or to host panel discussions from leaders from other jurisdictions, including nationally and globally
    - Regulation and regional policies – Many of the existing ideas are not realistic or are not well positioned for Metro to undertake to meet the goal of the strategy. There's an opportunity for Metro to look at our own code and find potential areas to improve, simplify, or relax regulations. Jurisdictions can struggle with ambiguity of our terms.
    - Technical assistance and capacity building – Investing in capacity and partnerships with industry could be its own category of strategies. If we provide that technical support, new staff would be needed for support. Possible to create presentations for 5-6 topics that Metro is strong on that could be shared as resources for partner jurisdictions.

In August, the short list of proposed actions for the draft RHCS was shared back with all participants from these cross-departmental meetings to allow for another round of feedback. Additional small meetings occurred with specific subject matter experts before the release of the public discussion draft to finalize the action description details and align expectations around implementation.

Racial equity

Racial equity framework check-ins
Purpose:
The RHCS applied the Metro Racial Equity Framework derived from Metro's Strategic Plan to Advance Racial Equity Diversity and Inclusion (SPAREDI) to prompt reflections at key project milestones. These check-ins dedicated time for the project team to discuss the racial equity outcomes and impacts of work related to the development of the RHCS and adjust the approach or activities accordingly. The framework was modified from its original form to meet the specific needs of the RHCS and address the areas of work like Affirmatively Furthering Fair Housing and a focus on data justice.

Approach and feedback:
Check-in #1: Engagement plan and scope of work, December 17 and 18, 2024

- Discussed engagement approach and the right balance between hosting new events versus collecting information and feedback from recent previous engagement.
- Reviewed scope of work for areas of opportunity for data analysis, qualitative data collection, and engagement activities that would ensure diverse perspectives and needs were reflected in the RHCS

Check-in #2: Racial equity vision statement, principles, and process goals, March 14, 2025

- Established project specific racial equity process goals and guiding principles
- These goals were split into two categories – guiding principles that reflected the project's overall intended outcome, and process goals that reflected the team's approach to completing the work

Check-in #3: Preliminary engagement results and early themes; evaluation framework, May 7, 2025

- Discussed data analysis, presentation, and sources to balance margins of error with disaggregating data when possible to provide more representation. Thought through ways to improve data collection and analysis for the future RHCS process.

Check-in #4: Final strategy, implementation, and accountability, October 9, 2025

- Planned for accountability, tracking and measuring progress, reflected on areas for improvement, and discussed strategy to report back to engaged parties.

Project Vision
Create a roadmap for actions Metro will advance to promote housing production, coordination, and equitable access. This will be achieved by lifting up emerging best practices, coordinating and aligning local strategies, and addressing critical gaps that can be filled at the regional level.

Equity Guiding Principles
Promote the production and maintenance of housing that is of diverse types, high-quality, physically accessible, and affordable

- Support the development and preservation of affordable housing, including deeply affordable, permanent supportive housing
- Identify local or regional barriers to developing housing, including financial, regulatory, or capacity-related constraints

Promote access to economic opportunities, services and amenities

- Promote community wealth-building opportunities by decreasing rent burden and removing financial barriers to home ownership
- Expand contracting and workforce development opportunities in the housing production pipeline
- Ensure policies, funding, and programs prioritize access to high quality, stable housing for historically marginalized communities
- Coordinate strategies that help stabilize communities

Promote Fair Housing

- Address significant disparities in housing needs and access to opportunity
- Promote integrated and balanced living patterns with access to opportunity and housing choice
- Foster and maintain compliance with civil rights and fair housing laws

Equity process goals

Overall project

- Apply a racial equity framework and principles to our research, technical analysis, engagement, and overall strategy development
- Ensure accountability to our racial equity goals by evaluating our progress throughout the project and following completion of the strategy
- Reflect on internal processes and identify improvements for the next Regional Housing Coordination Strategy
- Apply an equity lens to the decision-making process

Evaluation framework

- Measure fair housing and racial equity impacts through the evaluation criteria
- Assess potential impact towards closing racial disparities in housing access and stability

Data

- Apply an equity lens to data collection, analysis and presentation

Engagement

- Coordinate with jurisdictional partners, aligning strategies across agencies and ensuring a strong regional approach to equitable housing solutions
- Ensure the experiences, priorities and expertise of community of color shape strategy development and implementation

Committee on Racial Equity (CORE)

Purpose:

Metro's Committee on Racial Equity brings together a diverse group of community advocates to advise Metro Council to advance racial equity across Metro's work areas. Specifically, the committee supports Council by:

- Advising on and evaluating the implementation of the Strategic Plan to Advance Racial, Equity, Diversity and Inclusion (SPAREDI)

- Providing community oversight and opportunities for Metro to have greater accountability to the community on the implementation of the Strategic Plan and its commitments to racial equity
- Maintaining relationships and building trust with communities of color
- Providing a concrete mechanism for keeping Metro accountable to its racial equity goals
- Communicating Metro's progress in implementing the Strategic Plan and other racial equity strategies.

Presenting the RHCS to CORE for their input on the application of the racial equity framework was an effort to ensure that equity considerations and reflections were woven throughout the project. Additionally, providing a project overview early in the project and asking CORE for their desired level of involvement allowed for responsiveness to their interests and enough time to make a plan that reflected their decisions.

Approach:
Meeting #1 – Project overview, presentation of the equity framework, gauge CORE interest in future project involvement, February 20, 2025

- Staff developed options for CORE's level of involvement, providing a selection between one and three additional meetings based on their level of interest in the project.
- CORE members selected the option to have one more additional meeting focused on engagement updates, the proposed evaluation framework, and results from the racial equity framework check-ins. Additional written updates about the development of the draft report and technical analysis would be provided to the committee as requested.

Meeting #2 – Project deliverables and engagement update, review of evaluation framework, review of preliminary list of actions, June 26, 2025

- CORE members heard a project update and key takeaways from recent engagement, reviewed details of the evaluation framework and the preliminary list of actions.
- One CORE member noted that the language used in certain evaluation criteria categories could be overpromising the impact of our actions on addressing access and affordability challenges. This observation resulted in additional language in the evaluation criteria section explaining that the evaluation language is connected to Oregon's Fair Housing Issue Areas and intended to help integrate outcomes that Affirmatively Further Fair Housing in the RHCS. The criteria reflect the goals that the strategy strives to meet through the combination of proposed actions taken together over the next six years.
- The group was in broad agreement that the project was moving in the right direction, but provided some comments highlighting the importance of transparency, accountability, and open communication with CORE during the implementation of the RHCS. These efforts will help ensure that the next RHCS is reflective of lessons learned and does even more to move the needle for housing production, affordability, and choice.
- CORE members were notified about the publication of the draft RHCS and invited to participate in the public comment period to provide any additional feedback.

Decision-making

Metro Council will approve the final Regional Housing Coordination Strategy (RHCS) via Resolution by December 2025. Following this adoption, staff will submit the final Strategy to the Oregon Department of Land Conservation and Development (DLCD) for review and approval.

Prior to the Council's adoption, the Metro Policy Advisory Committee (MPAC) made a recommendation about strategy approval and the final draft RHCS was shared with interested parties for a 30-day public comment period.

Metro Technical Advisory Committee (MTAC)
Purpose:
The project team presented regularly to MTAC to provide technical feedback as the strategies were developed and evaluated and shared their feedback and recommendations to the project staff and MPAC.

Approach:
Meeting #1 – Introduce the RHCS, October 16, 2024

Meeting #2 – Presentation of the work plan and engagement plan, March 19, 2025

Meeting #3 – Preliminary list of strategy ideas, draft evaluation framework, May 21, 2025

Meeting #4 – Evaluated list of actions, July 16, 2025

Meeting #5 – Review draft RHCS, October 15, 2025

Meeting #6 – Recommendation to MPAC, November 19, 2025

Metro Policy Advisory Committee (MPAC)
Purpose:
MPAC followed the development of the RHCS and brought the perspective of local jurisdictions and relevant organizational leadership to recommend the final strategy to Metro Council.

Approach:
Meeting #1 - Introduce the RHCS, November 13, 2024

Meeting #2 – Presentation of the work plan and engagement plan, March 19, 2025

Meeting #3 – Engagement themes, Metro's roles in housing, preliminary strategy ideas, May 28, 2025

Meeting #4 – Evaluated list of actions, July 23, 2025

Meeting #5 – Review draft RHCS, October 22, 2025

Meeting #6 – Recommendation to Metro Council, November 19, 2025

Metro Council work sessions and meetings

Purpose:

Metro Council is the primary decision-maker regarding the adoption of the RHCS and will take action to adopt the plan by December 2025. Project staff periodically updated Council on the strategy development to provide findings from engagement and give Councilors the opportunity to shape the plan and voice their concerns and priorities along the way.

Approach:

Work session #1 – RHCS overview, present work plan and engagement plan for feedback, February 18, 2025

Work session #2 – Engagement update, Metro's roles in housing, preliminary list of strategy ideas, May 20, 2025

Work session #3 – Final evaluation framework, evaluated list of actions, July 29, 2025

Work session #4 – Receive MPAC recommendation, December 2, 2025

Meeting to adopt Resolution – December 18, 2025

Public comment period

Purpose:
The public comment period provided time for dedicated review and comment on the draft RHCS and lasted from September 15 – October 15, 2025. The draft RHCS, technical appendices, and executive summary were posted to the project web page. This provided the general public access to the full suite of project deliverables. Additional comments could be submitted via project email, phone number, or feedback survey.

Final presentations to review the draft RHCS were made to county committees based on invitation. The project team presented to the Washington County Coordinating Committee (WCCC), the WCCC Transportation Advisory Committee, and the Clackamas County Coordinating Committee (C4). Some public testimony was submitted via email from elected officials representing the City of Portland, Multnomah County, and Washington County.

Questions from the public comment feedback survey:

- How satisfied are you with the list of actions in the Regional Housing Coordination Strategy?
- Are there specific proposed actions you strongly support more than others?
- Do you think that any critical actions are missing from the proposed list of actions?
- Do you have suggestions for Metro's implementation of this strategy over the next six years?
- Do you have any other comments to share about the draft RHCS?
- Are you responding on behalf of an organization?
- What county is your organization located in/which county do you live in?

Feedback from the public comment survey and meetings focused on the draft RHCS (Implementers Work Group, MTAC, MPAC, C4 and WCCC). Some notes of support reflect review of the actions after the evaluation process.

ID	Action	Support and public comments
1	Create new housing **pre-development and technical assistance** funding for site specific housing development.	**SUPPORT:** Implementers Work Group Top 5 **Survey:** Pre-development grants/loans are best suited to be implemented by a gap funder to help with loan conversation. Adding another funder to the mix creates complications. In addition, the state currently funds pre-development but lacks resources. However, site-specific pre-development could mean more than direct funding to developers with identified land and this feedback is specific to pre-dev grants to affordable housing developers.
2	Explore opportunities to expand **resources available for brownfield cleanup.**	**SUPPORT:** MTAC Top 5 **Survey:** Try to complement rather than duplicate existing programs (e.g. the brownfield remediation fund through Business Oregon).
3	Funding and support for **local Housing Production Strategy implementation**	**SUPPORT:** Implementers Work Group Top 5
4	Consider developing a **regionally available pool of housing professionals for technical assistance** to smaller jurisdictions to support planning and implementation related to housing production, affordability and choice.	**SUPPORT:** Support from Implementers Work Group **C4 Metro subcommittee**: Lots of new programs and incentives from the State – staff could use support in connecting to these programs and understanding how they can be used in the local community This would be helpful for jurisdictions of all sizes. Larger jurisdictions are often trying to work on simultaneous planning efforts but can't due to limited staff capacity. Additional resources for planning support could help them too.
5	Evaluate lessons learned and effective practices from implementation of the 2018 Affordable Housing Bond; research models and best practices and develop and share recommendations to	**SUPPORT:** Idea generated from fair housing consultant; additional support for communications and messaging from MPAC and through previous Metro housing-related engagement **Survey:**

	strengthen fair housing and equitable access to affordable housing.	Evaluation of voter-approved and taxpayer funded programs is a necessity. However, the additional evaluation identified are unlikely to increase access to affordable housing and may be administratively burdensome for implementing partners and developers. In addition, HUD requires Participating Jurisdictions to review fair housing and access broadly. Lessons from the bond could support the industry more broadly – understanding the capital/operation costs, ownership structures, funds leverages, lease up demographics, and equity in contracting results (including buy-ups if any). In addition, Metro should hire an independent entity to evaluate the Metro Land Acquisition Program to determine effectiveness and overlap with the State Land Acquisition Program. **MTAC:** There is a huge messaging and communication opportunity here to share the successes of the bond with the community when its impact can be easy to miss
6	Building upon lessons learned and best practices from the 2018 bond and TOD grant program, **strengthen requirements and incentives for community participation and co-design in the development and operations of affordable housing**. Identify opportunities for Metro to support capacity building for community based and culturally specific organizations to participate in affordable housing development and operations.	**SUPPORT:** Support from focus group with providers and advocates **Survey:** Metro should not add requirements for affordable housing developments or explore additional requirements given the limited capacity of affordable housing developers and operators as our field navigates challenges with the federal government. These requirements would need to come with local tools or investments, which Metro is not able to support without a new bond. In addition, a clear fiscal analysis should be complete. **MTAC:** There is a huge messaging and communication opportunity here to share the successes of the bond with the community when its impact can be easy to miss
7	Research, evaluate and identify opportunities to advance **innovative and non-LIHTC approaches to housing** development/construction, financing, and ownership, including:	**SUPPORT:** Strong support from survey respondents; support from financers focus group; support from advocates and providers; support from Implementers Work Group **Survey:**

	• Modular and manufactured housing and cross-laminated timber and smaller or expandable designs • Social housing and alternative homeownership models, including CLT and resident-owned multi-family housing models • Innovative financing approaches to support development of smaller scale (<20 unit) building types, including PSH Assess barriers and opportunities and identify opportunities to pilot or scale up innovative approaches; approach would include market analysis, best practice research and engagement with public, private, and philanthropic partners to support coordinated research, development and investment strategies.	This feels like a worthwhile research effort, but it should not be limited to non-LIHTC financing. The change of the PAB rule from 50% to 25% could lead to new strategies to best pull down federal tax credits. In addition, any research of innovative ideas should include known challenges and obstacles to first-time efforts (as they often increase costs in pilots). **MTAC:** Support for innovative construction materials but would see that as having a high impact rather than medium PHB is exploring social housing – make sure to coordinate The crux of this action is how to implement the innovative approaches at scale – smaller, human scale development requires more subsidy for construction and longer term management
8	Conduct an **assessment of middle housing** in the region to identify best practices and common barriers.	**SUPPORT:** Support from HBA government affairs group **Survey:** Consider removal since legislation around middle housing is constantly changing. If it is not removed, we recommend moving its implementation further than 2026. What is the connection to the state MiRL program? **Implementers Work Group:** Interest in adding to the assessment more information about who is living in these units and their average price points to better understand who this development type is serving
9	Develop an **affordable housing stabilization strategy** to respond to industry-wide challenges due to rising	**SUPPORT:** Idea cumulated from several engagement conversations with affordable housing developers, operators, and service providers

	operational costs, increased resident needs, and lack of coordination/alignment with homeless and supportive services.	**Survey:** Explore pairing RLRA vouchers with buildings in need of additional subsidy and/or with vacant units. This is certainly need, but the challenges are not a Metro area issue but an issue across the state and nation. We disagree with the connection to production as it relates to land use planning, and implementation planning would have to occur with the funders of the affordable housing. For the most part, that would be OHCS. **Implementers Work Group:** Noted the importance of strategies focused on existing affordable housing preservation and not just production focus
10	**Evaluate and improve Metro SHS funded Regional Long Term Rent Assistance (RLRA) policies and implementation** to address portability and to connect available vouchers with vacant regulated affordable housing units.	**SUPPORT:** Housing Oregon survey responses **Survey:** It is not appropriate to include this recommendation the RHCS. It repeats myths, that RLRA isn't portable, and did not appropriately include implementation partners and SHSOC in the development of this action. While evaluation of the RLRA program would be a value to the SHS program, and is consistent with Metro's role in the SHS program, the related jurisdictional partners have not been sufficiently engaged to inform the development of this strategy that proposes to improve RLRA. The potential areas of evaluation outlined in this strategy don't match County implementor expertise concerns and questions that could be improved through the proposed evaluation and policy improvement process. **Multnomah County Commissioner Shannon Singleton:** While this has a low impact on housing production, it is a critical reform needed for SHS and will have a high impact for that funding and programs.
11	Develop a centralized **regional affordable housing listing service** to support housing navigators and seekers in connecting with information about available units that meet their needs, with an initial focus on building out a	**SUPPORT:** Interview with Community Visions and support from the focus group with housing advocacy groups and service providers **Survey:** This is a gap in our field and aligns well with the work of the TCPB. However, it is out of scope of the RHCS. WashCo is interested in being a partner as Metro

	portal to assist housing navigators working with households in the homeless services system.	considers the idea of connecting low-income people with affordable housing (beyond those experiencing homelessness). This will be extraordinarily difficult to update and maintain.
12	Develop a proposed plan for a **regional land bank** that outlines the necessary legal framework, governance structures, and operational guidelines to support cross-sector collaboration and investment. Define clear policy priorities, including considerations related to Affirmatively Furthering Fair Housing, market conditions and funding opportunities.	**SUPPORT:** Strong support from survey respondents; support from Habitat for Humanity and Proud Ground; Implementers Work Group Top 5; MTAC Top 5; MPAC support **Survey:** Coordinate with state and city-level land-banking strategies. Consider the state's Home Start Lands strategy in which the sale of some state properties funds a subsidy pool for future housing on state owned lands. Include an evaluation of the Metro Land Acquisition Program by an independent party. Evaluate land banking strategies against revolving loans for land acquisition (consider cost efficiencies of both approaches). Consider alignment with the state funded LAP. WashCo is an eager partner as you develop this idea. **Multnomah County Commissioner Shannon Singleton:** I think it is a critical tool that we can use to also address short term needs (like emergency shelter) until development is ready to begin.
13	Explore how to create a **permitting and production dashboard** to track production trends across the region.	**SUPPORT:** Home Building Association focus group support; MTAC and MPAC support **Survey:** In our experience, public works permitting is subject to much more delay as compared to building permits, so make sure to parse these two phases out. Benefits of this action are unclear. The proposed dashboard seems to duplicate information the state will track and include in its Housing Production Dashboard. Can the RHCS clarify any differences/unique benefits? Not needed and will end up creating an additional burden on local jurisdiction staff who are already heavily burdened.

		MTAC: Hear anecdotes about permitting timelines and costs dissuading developers from working in certain communities – would like to better understand if that's true and how Metro can provide support to alleviate those challenges Weak data infrastructure currently to compare jurisdictions – HBA is connecting with jurisdictions to understand what data they have and how it can be used to compare across a few basic categories as a starting point **Implementers Work Group:** Concern that this action could be burdensome to staff and duplicative of work being done through the state
14	Begin a Metro **Urban Growth Management Functional Plan audit and cleanup** of housing-related titles to align with new State requirements and regional priorities as identified in the 2027 Future Vision.	**SUPPORT:** Internal staff idea with general support from Implementers Work Group and MTAC **MTAC:** Can this also look at Title 14 requirements and streamline to save money that could be used towards infrastructure funding
15	Convene jurisdictional partners to develop a **coordinated legislative agenda for state and federal housing/homelessness resources**, including a regional priority to identify funding for infrastructure. The agenda would be updated as needed to meet changing regional needs (or every six years) and guided by appropriate Metro advisory committees for land use, housing and homelessness. Convene with Tribes that are interested in housing development to support urban Native populations to learn about their tribal priorities that can be addressed through Metro's work.	**SUPPORT:** Strong support from survey respondents; Implementers Work Group Top 5; MTAC Top 5; MPAC support; support from HBA focus group **Survey:** How would this complement existing coalitions (Housing Oregon and Housing Alliance)? We have concerns regarding Metro staff capacity as well as the implementation timeline for some of the actions. We recommend starting work earlier and phasing it in over time. This would enable the region to start building alignment towards this goal in the near term so that ultimately we can build up to a fully coordinated legislative agenda. This coordination makes sense. The action references advisory committees, and WashCo remains uncertain about the future of SHS/AHB governance. We don't read this action to move governance but wanted to note that confusion.

		Implementers Work Group: Suggestion to separate into three actions: infrastructure funding support for housing; homelessness resources; Tribal priorities **MTAC:** Could this action begin sooner to allow time to be organized and implemented before the next long session? Can the impacts of prevailing wage be studied further and better understood? Consider going beyond infrastructure facilities funding – can this effort look at taxation structures? **Multnomah County Commissioner Shannon Singleton:** It may be inferred in #15 that we will have a regional housing development prioritized list for State budget allocations, I think it is critical to call this out separately and distinctly. The current practice of every project competing individually does not allow us to leverage funds or move forward geographic or population development priorities for our region. We coordinate to this level for transportation projects and desperately need the same for housing infrastructure projects.
16	Consider the viability and feasibility of **new funding for affordable housing development and preservation**. Ensure that any new funding framework is informed by public opinion research and engagement with public, private and nonprofit leaders as well as analysis of housing needs and market conditions, and lessons learned from the 2018 regional housing bond and best practices from other regions;, including evaluating opportunities to strengthen racial equity, fair housing and community resilience outcomes and alignment/integration with homeless and supportive housing services.	**SUPPORT:** Strong support from survey respondents; Implementers Work Group Top 5; MTAC Top 5; Strong support from focus groups with advocates and providers **Survey:** Put a new regional housing bond on the ballot, and use it to finance missing options, definitely including limited equity housing cooperatives, and possibly also other models. This is the most impactful action to increase affordability in our region. Metro should consider the impact of the Land Acquisition Program and whether to consider it. Metro should also provide guidance on any cost savings or benefits of property acquisition and conversion versus new builds. PSH and low-income requirements should include analysis of rental vouchers as PHAs fall into shortfall and RLRA is fully leased up. **MTAC:**

		Important that this is informed by impactful research (not just public opinion research) Is it possible a future bond could serve income bands in between the 30% and 60% levels dictated by LIHTC? There is often a large need for people who fall between those income thresholds

Survey feedback about missing actions

- HCAs done by cities/counties seem disconnected from Metro's work – how can Metro build on the work being done by cities and counties to inform future decisions?
- Stand up a fund specifically for predevelopment, development, and awareness of limited equity housing cooperatives
- Siting economic development with housing – provide oversight for the six TIF districts that are going to be enacted over the next 20 years so they can be leveraged to make as much of a dent in the backlog as possible – advocate for changing the URA rules at the state level
- Add TOD to the land banking action idea
- Housing bond funds seem to have been used for only buildings with affordable units instead of mixed income developments – are we concentrating poverty once again – could the funds be used in mixed income buildings or developments – how can we replicate New Columbia in North Portland?
- Talk more about the relationship between ownership as a source of equity and the rising cost of housing – when we treat housing as a source of equity, housing becomes more unaffordable. We need more affordable housing.
- Missing actions that propose recycling of capital – the housing bonds have been successful, but the resources are finite and now exhausted. Could there have been a more strategic model that recycles capital throughout the region in a way that funds can be managed more like inheritance rather than exhausting it. It could grow and have a multiplier effect over time – the next funding source will need to model out more creative capital recycling so that this can be a virtuous cycle

General feedback about Metro's roles

- The RHCS defines broad roles for Metro that overlap with Public Housing Authorities, the State's Housing Finance Agency, and new and longstanding programs. The actions read as a wish list from the development community, all great things that the industry needs. However, some of the actions are better suited for the state or a PHA to administer. These conversations about broader housing strategy should be distinct from the onerous timelines of OHNA implementation, at least for this next draft as Metro works to meet state timelines, to allow for role clarity conversations with all partners.
- Metro currently proposes its role as supportive and collaborative. Avoid adding reporting requirements/workload for local jurisdictions beyond what is already required for state reporting. It is also important to avoid duplication of reporting requirements at the state and regional levels.
- Could Metro produce an infographic of sorts that describes the roles and responsibilities of all the various local governments and agencies in the housing world? It is extremely confusing, even for people within the housing planning world. It's hard to assess whether some of the actions in the draft plan are needed when we don't know what other efforts are being made at the county level, city level, or state level. And by nonprofits and the federal level, for that matter. For example, the affordable housing listing service - what is the problem this will solve, and are there

others that are already working to solve it? Can you paint the picture for all of us so that we can understand how we already are coordinated, and where gaps and disconnects might still exist?
- Gather all the committees, councils, oversight, advisory board from Multnomah County, the City of Portland and the Metro Regional Government and come together as one to discuss (maybe two times a year) all the policies they are worked on.
- Telling the story of our region to our region is so important. We need to know who we are and what we stand for as we move into the future. This is a heavy lift, and something we need to come up with the culture to make happen. People are here, and more are coming, as a result of climate disruptions. And we need to reckon with all of it.

<u>Feedback about RHCS focus and implementation</u>

- Ensure that the strategy and implementation include significant focus on both affordable housing and unlocking private, market rate housing development.
- Prioritize actions that you assess to have the greatest impact on housing production.
- Focus on the strategies that have the most impact first in addressing housing affordability and stability first.
- Spend more time and energy on the direct funding or TA programs, and less on the studying and convening roles. Studies are useful, but at this point in time our industry knows the challenges and has been calling for direct help for years. Funding is limited and costs are rising, so the actions that are most critical are those that can have tangible outcomes for residents and organizations.
- The state has launched new programs (Moderate-Income Revolving Loan program) and revamped application processes that could benefit from a coordinated regional strategy. Some actions described are clearly efforts to support the region in drawing down federal and state funding for housing development.
- There seems to be need for a regional coordinated jobs strategy to support the increase in housing production. We need to ensure that people can afford to purchase and remain in the homes that are being built.
- Can there be a bigger investment in workforce development in the trades to increase labor capacity?
- MPAC should be encouraged to provide direction to Metro to focus on the items where Metro has either a high or medium impact on development of needed housing.

Lessons learned for the next RHCS

Following the completion of the draft RHCS and the end of the public comment period, the project team gathered to discuss lessons learned, celebrate what worked well, and identify concrete changes that would improve the process of developing and implementing the next RHCS.

Applying the racial equity framework
The team agreed the racial equity framework based on the Strategic Plan to Advance Racial Equity, Diversity and Inclusion (SPAREDI) had been a central component to the evolution of the RHCS. Starting the process with this lens in place gave time for the project team to slow down and reflect on work while it was ongoing and adjust the approach as needed, from the scope of work and engagement plan to evaluating the actions and discussing plans for implementation. The framework helped to center fair housing considerations in both the evaluation criteria and in understanding the potential impacts for each proposed action.

The project team noted the cadence and timing of meetings felt mostly effective but recommended a small shift - begin future efforts with a meeting specifically to establish project racial equity goals before jumping into scope and engagement planning. Having the project equity goals and objectives clearly articulated at the outset and revisiting them to refine as the project moves forward would make the framework feel less abstract and more actionable.

The team also found that tailoring the racial equity framework to the RHCS context produced better conversations and clearer guidance throughout the project. Planning specific reflection time during development of the project schedule helped the team be more accountable and ensure this time did not fall off the radar.

Data collection and analysis
While the project team felt effective in meeting the requirements of the RHCS, in future processes there is an interest in strengthening internal capacity to analyze new data sources. Some timing mismatches between data publication and the analysis meant that not every desired data set was available. Additionally, in the next RHCS process, the data analysis could be more explicitly connected to the justification of each action and the potential action impacts, both demographically and geographically.

Internal engagement
Internal coordination and collaboration within Metro was very successful. The Housing and Planning, Development, and Research Departments shared responsibilities with outreach, analysis, evaluation, presentation, and review. This approach ensured that the right subject matter experts had a chance to weigh in on the strategy, especially when discussing the implementation steps, to make sure the final list was feasible within the next six years.

During the next RHCS development, the project team should continue collaborating early on with the Government Affairs team to ensure alignment with other regional and state coordination and to connect with the Tribal Affairs staff members to determine the right approach to engaging Tribal Governments and urban indigenous community-based organizations.

Metro committees were regularly updated on the progress of the RHCS, allowing for several opportunities to learn about the strategy development, ask questions, and share feedback. Involvement with the Committee on Racial Equity (CORE) was more limited based on the preferences of the membership and their interest in the project. In the future, CORE members should be brought into the work, as interested, to solicit their feedback about engagement, project goals, and accountability under the SPAREDI. Early brainstorming with CORE and deliberate planning to outline the purpose of their meetings will reinforce their oversight role.

External engagement and relationship building
External partners shared their perspectives on the roles that Metro should play and the actions that Metro should take to advance housing production, affordability, and choice. This feedback, including feedback from recent related housing engagement efforts, formed the foundation of the proposed action list. Continuing to deepen the relationships built through the Implementers Work Group and dedicated focus groups through the implementation of the strategy will lead to better outcomes and a stronger start to the next RHCS.

In the future, if more dedicated engagement staff are available, the team could consider expanding outreach efforts to more housing partners or creating events for the jurisdictional staff, developers, and service providers to meet at the same time to share across their sectors. Regardless, working to schedule engagement activities as early as possible will ensure flexibility for the right staff and partner organizations to be involved during the right stages of the project.

Strategy implementation and accountability
To track progress after adoption, the team proposed a few practical accountability tools. A centralized RHCS progress dashboard that would be updated through a biannual Planning, Development, and Research and Housing Department coordination meeting would provide a single place to view the status of action implementation. The dashboard would include metrics to track action impact and help the team understand effectiveness over time. Hosting that dashboard on the project website and providing updates through MetroNews and the housing related newsletters would increase transparency to the general public and partners.

Overall, centering equity through each step of strategy development, including time for reflection in the schedule, clarifying roles for internal coordination, expanding internal capacity to incorporate new data sources, deepening external relationships, and creating simple accountability mechanisms will make the next RHCS stronger.

Full list of engagement activities

Date	Group	Topic
October 16, 2024	MTAC	Meeting #1 – introduce RHCS
November 13, 2024	MPAC	Meeting #1 – introduce RHCS
December 17-18, 2024	Internal Metro project team	Equity check-in #1 – engagement plan and work plan
February 18, 2025	Metro Council	Work session #1 – project overview, work plan, engagement plan
February 20, 2025	CORE	Meeting #1 – project overview, equity framework, discuss future involvement
March 11, 2025	Cross-departmental Metro work group	Meeting #1 – brainstorm strategies, discuss inventory of existing Metro work to promote development of needed housing
March 14, 2025	Internal Metro project team	Team meeting to discuss racial equity goals
March 19, 2025	MTAC	Meeting #2 – work plan, engagement plan
March 19, 2025	MPAC	Meeting #2 – work plan, engagement plan
April 3, 2025	Washington County Planning Directors	RHCS overview, scope, engagement strategy
April 18, 2025	Implementers Work Group	Meeting #1 – project overview, Metro's roles in housing production and access, preliminary action brainstorming
April 19, 2025	1000 Friends of Oregon LULI	Project overview, Metro's roles in housing production and access
May 6, 2025	Cross-departmental Metro work group	Meeting #2 – review draft evaluation framework and preliminary list of strategies
May 7, 2025	Internal Metro project team	Equity check-in #2 – preliminary list of strategies and engagement; application of the project racial equity goals
May 14, 2025	C4	Meeting #1 - Project overview; Metro's role in housing; brainstorming preliminary list of strategies
May 16, 2025	Oregon Smart Growth	Discussion of barriers and strategy ideas
May 16, 2025	Implementers Work Group	Meeting #2 – preliminary discussion of strategies and evaluation framework
May 20, 2025	Metro Council	Work session #2 – preliminary list of strategies, Metro's roles, engagement update
May 21, 2025	MTAC	Meeting #3 – preliminary list of strategies, draft evaluation framework
May 28, 2025	Focus group: Housing advocacy	Project overview, discuss barriers to unmet housing need, brainstorm ideas for

	and provider coalitions	strategies Metro could take to address regional housing needs
May 28, 2025	MPAC	Meeting #3 – engagement themes, Metro's roles and categories of strategy ideas
May 29, 2025	Focus group: HBA and market rate developers	Member meeting – project overview, Metro's roles, barriers, strategy ideas
June 11, 2025	Housing Oregon	Member meeting – share brief project overview and advertise survey to provide feedback on Metro's roles and preliminary action ideas
June 13, 2025	Focus group: Innovative approaches to financing and development	Project overview; discussion of barriers; discussion of strategy ideas with development and financial professionals with experience in innovative approaches to affordable housing outside of Low-Income Housing Tax Credits (LIHTC)
June 19, 2025	HBA	Government affairs follow-up meeting
June 26, 2025	CORE	Meeting #2 – preliminary list of strategies, evaluation framework
June 27, 2025	Implementers Work Group	Meeting #3 – reviewing finalized evaluation framework and shortened list of evaluated strategies
July 10, 2025	WCCC TAC	Evaluation framework, list of evaluated actions
July 14, 2025	WCCC	Evaluation framework, list of evaluated actions
July 15, 2025	Focus group: Urban Native community-based organizations	Project overview, discussion of barriers to housing production and access, discussion of potential actions for Metro
July 16, 2025	C4	Meeting #2 – engagement updates and evaluated list of actions
July 16, 2025	MTAC	Meeting #4 – evaluated list of actions
July 23, 2025	MPAC	Meeting #4 – evaluated list of actions
July 29, 2025	Metro Council	Work session #3 – evaluated list of actions
September 15 - October 15, 2025	Draft RHCS released; public comment period	
September 19, 2025	Implementers Work Group	Meeting #4 – review draft RHCS
October 2, 2025	WCCC TAC	Final draft RHCS
October 9, 2025	Internal Metro project team	Equity check-in #3 – Implementation and accountability, process improvements
October 13, 2025	WCCC	Final draft RHCS
October 15, 2025	C4	Final draft RHCS
October 15, 2025	MTAC	Meeting #5 – review draft RHCS
October 22, 2025	MPAC	Meeting #5 – review draft RHCS and public comment themes

November 19, 2025	MTAC	Meeting #6 – Provide recommendation to MPAC
November 19, 2025	MPAC	Meeting #6 – Provide recommendation to Council
December 2, 2025	Metro Council	Work session #4 – receive MPAC recommendation
December 18, 2025	Metro Council	Adoption of final RHCS through Resolution

Additional full engagement summaries from pre-scoping research

Permanent Supportive Housing and Supportive Housing Services Implementation Engagement Summary

Overview
Metro's Housing Department staff conducted a scan of prior local and regional engagement efforts of key reports that have been developed for the implementation of Permanent Supportive Housing (PSH) and Supportive Housing Services (SHS). We extracted key highlights pertaining to PSH and SHS units and services, the needs of Black, Indigenous, and People of Color (BIPOC) communities, as well as those of other priority populations. For this analysis, we identified recurring themes in both needs and recommendations from the scan, along with discernible gaps between the identified needs and corresponding recommendations.

The purpose of this scan is to honor prior community input, minimize unnecessary stakeholder engagement, and extract valuable insights from existing feedback provided by supportive services users, priority populations, service providers, and community leaders. The analysis synthesizes findings from the scan.

Limitations
The key community reports analyzed included varying level of detail regarding their engagement processes, methods, and stakeholders. Some reports identified key themes and sets of aligned recommendations resulting from their engagement processes, while others solely provided recommendations. The analysis mirrors this diversity in the breadth of themes and recommendations.

Analysis of select themes and recommendations
1. Cultural understanding and empowerment
    - Cultural gaps and racism/discrimination are identified as significant issues affecting BIPOC individuals. For example, Native Americans face invisibility in the homeless system due to limited specialized cultural supports and a lack of knowledge of different Nations' unique processes to apply for tribal resources and benefits, impacting their ability to access housing opportunities.
    - While recommendations include community engagement and capacity building, there are gaps in explicitly addressing the need for cultural competence training for service providers to enhance understanding and eliminate discrimination.
2. Avoidance of services and fear of oversight
    - BIPOC individuals, youth, immigrants, and refugees report avoidance of services due to unclear definitions, lack of cultural understanding, racism, and fear of intrusive government oversight. Homeless families with children may avoid seeking services out of fear their children will be taken away while many immigrants and asylum-seekers needing services may do the same, fearing negative impacts to their status in the country.
    - Several reports highlight these concerns, however they generally lack targeted strategies to address reasons for avoidance, including unclear

program screening definitions, lack of cultural understanding, racism, and fear of government oversight.

3. Person-centered services
    - Community members and service providers express a need for person-centered services, including coordinated approaches to housing, health supports, documentation, financial assistance, and other aspects.
    - The recommendations address the need for a person-centered system, but how this will be achieved for various aspects mentioned (housing, health supports, documentation, etc.) is not detailed. More detailed strategies for each area are needed.
4. System-thinking and improvements
    - There is a general desire to enhance system capacity by refining assessment tools, standards of practice, and system mapping, along with improving information and referral processes.
    - Providers seek increased technical assistance for staying current with ongoing developments in the homeless care system. Additionally, there is a specific call for comprehensive system mapping of culturally-specific services and programs, emphasizing the need for alignment and coordination with parallel systems such as school districts, foster care, criminal justice, health, employment services, and basic needs services.

Metro Affordable Housing Investments Community Engagement Report

Overview
Coalition of Communities of Color (CCC) worked with Metro to conduct community engagement during the spring of 2024 to inform Metro's future housing investments. CCC is an alliance of 18 culturally specific organizations across the Portland metro area. Additionally, CCC staff have participated in the implementation of Metro's Affordable Housing Bond and Supportive Housing Services Measure.

Purpose
For this project, CCC partnered with culturally specific member organizations most impacted by housing needs and conducted three focus groups that also included members from the Welcome Home Coalition. The purpose of this engagement was to:

- Better understand community members' housing desires and challenges, particularly regarding regulated affordable housing and services.
- Hear community perspectives on potential changes to the supportive housing services measure, including relative prioritization of housing development and services, population focus, and housing strategies.
- Provide information for pathways for future civic engagement on Metro's housing work.

Findings
Community members continue to be impacted by the region's affordable housing shortage, resulting in deep social impacts. Participants identified challenges and opportunities to finding
and maintaining housing that were common to all focus groups and others specific to individual
populations. There was an emphasis that communities are not monoliths and continued,

meaningful engagement is needed to ensure that collective and individual needs and desires
are met in housing development and placement, as well as supportive services. Residents support investing in supportive housing resources in the development and acquisition of affordable housing while also maintaining sufficient services.

Key learnings:

- Housing affordability remains a pressing issue for families' well-being, including economic stability, mental health, and quality of life.
- Regulated affordable housing is very difficult to access and the supply is extremely low relative to the need.
- Both services and housing are essential for addressing homelessness and housing opportunities for low- and moderate-income households.
- More affordable housing is a long-term solution with the potential to better meet the needs and desires of households who cannot afford market rent.
- Services should not be reduced, but existing and future revenue beyond what is needed to maintain current service levels is a significant opportunity to invest in affordable housing.
- A wide range of services and assistance are needed to support housing stability for people with low and extremely low incomes.
- Community members have a wide range of ideas for types of housing, design elements, and increasing affordability, including conversion of existing residential and commercial buildings.
- Many housing desires and barriers that were identified in previous years' engagements remain salient, particularly desires related to the location of new affordable housing, amenities, and design features, as well as barriers around affordability and challenges maintaining housing stability.

Summary of Technical Engagement for the Evaluation of Affordable Housing Investment Opportunities

Overview

Between February and August 2024, Metro Housing Department interviewed industry stakeholders and experts in affordable housing development, finance, operations, and policy to inform future affordable housing funding recommendations. The process, led by Metro COO Marissa Madrigal, gathered insights on current market conditions, funding constraints, and opportunities for regional investment. Participants included developers, jurisdictional staff, and experts, whose feedback highlighted challenges such as escalating operating costs. Metro also engaged with Housing Oregon, a network of 75 organizations, through their Policy Council meetings and a dedicated listening session to address these concerns. The findings aim to improve Metro's affordable housing bond implementation and guide future strategies.

Summary of Input Received by Area of Analysis

Acquisition/Conversion/Adaptive Reuse

Metro's interviews with experts on property acquisition and conversion (sometimes referred to as adaptive reuse) highlighted that these opportunities are highly situational, influenced by factors such as property condition, location, zoning, and occupancy. Robust

assessments of capital needs, resident impacts, and conversion barriers are crucial. Key cost considerations include required renovations, seismic and zoning code upgrades, and accessibility improvements. Evaluations should focus on the needs of intended populations, especially for conversions like permanent supportive housing (PSH), while managing displacement risks for existing tenants. Despite funding constraints, SMEs emphasized that acquisition and conversion can be a cost-effective way to rapidly create affordable housing, including PSH, compared to new construction.

Preservation of Regulated Affordable Housing
Housing experts emphasized the critical need for reliable preservation funding, as current state and federal resources are insufficient and inconsistent. They advocated for a dedicated funding source, possibly established through partnerships. Inadequate preservation funding and rising operating costs pose significant risks to non-profits and the regional housing system, exemplified by the 2022 collapse of the Skid Row Housing Trust in Los Angeles. To ensure housing stability, experts suggested funding tenant protections, including regional vouchers for residents in properties with expiring affordability restrictions. Oregon's recent initiatives, such as the updated Publicly Supported Housing Preservation program and Affordable Housing Preservation Strategy Framework, provide valuable models for strategic investments and legislative advocacy.

Affordable Homeownership
Metro's bond funding will support nearly 160 affordable homeownership opportunities once fully expended, and experts suggested future actions to sustain this investment. Recommendations included exploring urban growth boundary extensions and drawing inspiration from initiatives like Seattle's Black Homeowner Initiative (BHI), which aims to create 1,500 new Black homeowners by 2027 through collaborative partnerships. The city of Hillsboro's approach — combining federal funding, land donations, and racial equity considerations — was highlighted as a potential model. Experts emphasized prioritizing racial equity to address historical disparities in homeownership and wealth. They also suggested fully funding projects rather than requiring multiple funding sources and expanding options beyond community land trusts to include traditional ownership structures, down payment assistance, and interest rate reduction programs.

Gap Financing of New Rental Construction
Metro's technical engagement aimed to refine gap financing assumptions and explore administrative improvements for multifamily rental construction. Experts emphasized better alignment with state and federal funders, reducing the burden of applications and fees, and addressing coordination issues with private activity bonds (PAB). Developers highlighted rising costs and recommended adjusting subsidy caps, expanding allowable uses, and clarifying underwriting guidelines. Concerns included restrictive developer fee caps, which they suggested should be tiered based on project complexity. Streamlining funding approvals and simplifying permitting processes were also proposed to reduce delays.

Operational challenges, such as insufficient funding for resident services and rising costs like insurance and interest rates, were identified as priorities. Suggested solutions included adjusting payment standards for supportive housing, creating pooled insurance funds, and improving coordination with lenders. Long-term stability in funding sources, such as extending the Supportive Housing Services measure, was also recommended to improve project viability and loan access.

Policies, Actions, Incentives to Support Affordable Housing Development and Operations
Metro and its consultants gathered feedback on supporting affordable housing, system gaps, and innovative strategies. Experts highlighted the need for streamlining processes, improving funding access, and addressing challenges faced by smaller, culturally specific developers. Recommendations included prioritizing pre-development and land acquisition funding, possibly through grants or below-market loans, to help these organizations compete with larger developers. Simplifying permitting, supporting land-use improvements, and offering incentives like tax abatements were also suggested, though concerns about their impact on infrastructure funding were noted.

Capacity-building support for smaller non-profits and culturally responsive organizations was emphasized to ensure equity in accessing funds. Innovations such as modular construction and mass timber were recommended for their potential cost savings, albeit requiring significant upfront investment. Experts also stressed the importance of direct funding for acquiring and converting existing properties, which could be more cost-effective than new construction. Overall, enhancing support for housing operators and improving administrative processes were seen as crucial to sustaining affordable housing efforts.

Urban Growth Report Roundtable Summary of Engagement Themes and Suggested Metro Actions

Housing production and affordability was a recurring important topic to UGR roundtable members. Participants expressed the need for renewing funding sources and establishing clear goals for affordable housing development to meet regional needs at various income levels. This affordable housing production should include units for both rent and ownership. Members mentioned that housing and land are resources for generational wealth building. Other roundtable members working in housing development cited the high infrastructure costs as a substantial barrier to housing affordability and production. This led to conversation about the need for policies to address historic underproduction and advocate for infrastructure funding. Some roundtable members advocated for workforce housing to support job growth in the region. By proactively planning for workforce housing at different income levels, including addressing the specific needs for farmworker housing, cost of living may become less of a barrier for workers here today and those considering moving in the future.

Actions:

- Renew funding for affordable housing
- Consider home ownership as an important tool for generational wealth-building
- Advocate for infrastructure funding that supports housing development
- Proactively plan for workforce housing

Diversity, equity, inclusion, and justice topics were woven throughout the UGR roundtable discussions. Staff heard from some members that it is important to center community in our conversation and remember the people that are represented in the technical analysis. Participants suggested connecting the data related to race, ethnicity with personal stories of lived experiences. This is a way to understand how different demographic groups have different needs and unique positions in the community.

Actions:

- Present numbers and data together with the stories and lived experiences of people in the region to provide a more complete picture

Development barriers and the feasibility of future development was another recurring topic in the group. The discussions included barriers to housing, commercial and industrial development. During an activity where participants identified development barriers, the list included:

- Price of property
- Zoning and market mismatch
- Market conditions outweigh subsidies
- Property owner motivations
- Cost of infrastructure to serve site
- Parcel assembly
- Site constraints
- Environmental challenges – brownfields, floodplains
- Absentee landowner
- Land banking
- Political challenges
- Public ownership
- Easements
- Regulatory requirements – frontage, trees, stormwater, fees
- Transportation infrastructure not well maintained and difficult site access

Members seek creative solutions and collaboration between the development community, local jurisdictions, Metro, and the State of Oregon. Some roundtable members specifically called out the long timeline from the beginning of the concept planning process to the start of construction and suggested reducing the amount of detail and procedures required to complete these steps. Others mentioned that their biggest barriers are expensive infrastructure and cost prohibitive development code requirements, especially on infill sites.

Actions:

- Collaborate with local jurisdictions and the State of Oregon to decrease development time and reduce code barriers for housing development
- Provide more regional support for local concept planning efforts

Discussing the variety of regional challenges and concerns led to conversations about the **role of Metro and local governments** in finding solutions. Roundtable members highlighted primary roles of Metro as listening to local concerns, partnering with cities to find infrastructure funding, advocating at the state level, and being nimble and flexible to change. Some of the local jurisdiction representatives mentioned the increasing need for fiscal balance in their community to continue to fund their local services.

Actions:

- Advocate for the region with the State
- Advocate for meaningful statewide revenue reform

Many of the topics brought to the roundtable inspired broader conversations about the **regional vision for the future.** As challenges and solutions grew beyond land use

interventions, members felt that it was important to be proactive about change rather than reacting. Some participants felt that the reputation of our region is at risk, and that bold, optimistic visions are needed to create a different future for the region. This will involve a messy process to bring many different voices, perspectives, and priorities to the table. Many of the challenges and concerns mentioned throughout this process go beyond the urban growth management decision itself and require continued leadership and collaboration to find new solutions and commitment to see them through.

Actions:

- Proactively plan for the region's future through regional collaboration and leadership
- Engage roundtable members and the jurisdictions and organizations they represent on the next steps to update to the regional future vision/growth concept

The need for **infrastructure funding** came up frequently in roundtable discussions. It was mentioned as a necessary solution in discussions of housing production and affordability, development barriers and the role of Metro and local governments. This is an area where many roundtable participants advocated for regional partnership in advocating for infrastructure funding at the State and with the Federal government.

Appendix 7: Full list of strategy ideas

Many engagement activities prompted participants to think about ideas for actions they want to see Metro take to promote housing production, affordability, and choice in the greater Portland area. This list encompasses the full list of ideas generated through the phases of engagement leading up to the production of the draft RHCS. Many ideas were combined or refined before evaluation for impact and feasibility. Others were removed because they are outside of Metro's legal authority, are actions that are a part of Metro's current work portfolio, or are actions being led by other organizations. The remaining ideas that were not included in this RHCS were documented for future consideration.

Action idea	Category	Source
Present housing data with the stories and lived experiences of people in the region to provide a more complete picture	Best practices and research	Previous Metro project engagement
Complete an analysis of impediments for fair housing	Best practices and research	City HPS
Use the RHCS to align jurisdictional partners on how we talk about housing affordability (TOD program is doing great with proof of concept)	Best practices and research	Metro staff
Look at best practices that balance prioritizing green building features and overall costs	Best practices and research	Metro staff
Share lessons learned from the Site Acquisition Program with other local jurisdictions; potential to use this as a best practice and to demonstrate "win" of the bond measure	Best practices and research	Metro staff
Collect and share best practices/toolkits/model code resources (including ones currently in development at DLCD) - best practices/ideas toolkit for local jurisdictions to meet their housing needs - Metro work to clarify what would result in a coherent outcome and usable tools in the regional context - simple things that create communities that are complete, healthy, equitable are getting lost in the effort to reduce barriers	Best practices and research	Metro advisory group
Provide regional research related to past harms analysis that can be shared with local jurisdictions	Best practices and research	Other engagement
Explore feasibility of modular development - what are the unique barriers in our regional context, opportunities for technical assistance or cost reduction strategies - research and share as best practices/resources	Best practices and research	Metro staff
Develop low carbon building policies	Best practices and research	City HPS

Action idea	Category	Source
Explore mass timber construction - research and share as best practices/resources	Best practices and research	Previous Metro project engagement
Explore non market social housing models to prevent housing commodification - research and share as best practices/resources	Best practices and research	City HPS
Trauma-informed design - design trauma-informed, person-centered spaces to address barriers like PTSD and social anxiety in transitional or permanent housing - research and share as best practices/resources	Best practices and research	Previous Metro project engagement
Provide research on innovative building practices and the best ways they can be implemented	Best practices and research	Implementers work group
Explore best practices for preserving affordable housing that has expiring regulatory agreements	Best practices and research	Implementers work group
Provide research on naturally occurring affordable housing and how those homes can be preserved and rehabilitated cost effectively	Best practices and research	Implementers work group
Weigh in on what informs the statewide model home legislation - a proposal to create a home plan that is preapproved and does not need to go through building or planning permitting. So far, the ideas are not in line with best practices	Best practices and research	Implementers work group
Support community ownership and stewardship models that ensure affordability over time	Best practices and research	Focus group
Explore an idea to mandate a "displacement impact report" as a requirement for development with assurances to mitigate impacts	Best practices and research	Focus group
Provide regional level analysis of past discriminatory actions or practices related to land and housing access to assist jurisdictions in completing that required part of the Contextualized Housing Need	Best practices and research	Implementers work group
Implement better messaging around affordable housing and test new communication strategies for regional use	Communication and public engagement	Interview
Expand outreach with trusted leaders, provide culturally-responsive and bilingual/multilingual services and outreach	Communication and public engagement	Previous Metro project engagement
Focus on youth outreach, particularly immigrant and refugee youth	Communication and public engagement	Previous Metro project engagement
Consult with Tribes and culturally specific developers that have worked with urban tribal community members to understand specific barriers and needs	Communication and public engagement	Metro staff

Action idea	Category	Source
Interest in Metro acting as a recruiter for developers who are willing to build middle housing at an affordable price point, even from beyond the region or the Pacific Northwest	Communication and public engagement	Other engagement
Consider engaging with service providers that are affected by increased number of produced units (Clean Water Services, waste haulers, stormwater, etc.)	Communication and public engagement	Metro advisory group
Prioritize outreach to communities of color to gather more data on housing needs and how to be responsive to them	Communication and public engagement	City HPS
Create public service announcements showing the benefits of affordable housing	Communication and public engagement	Implementers work group
Serve as a centralized, region and statewide communicator about housing market forces and challenges and help describe to the public and policy-makers how local, county and regional governments can and cannot intervene	Communication and public engagement	Implementers work group
Create a comprehensive website or resource which identifies opportunities to assist those who are houseless or to prevent houselessness. Connect and coordinate with various services and providers around the region.	Communication and public engagement	Implementers work group
Create and share with local jurisdictions educational/PR resources that cities can use to combat NIMBYism and promote housing policy changes on the local level	Communication and public engagement	Implementers work group
Look into podcasts with nationwide reach where local specialists speak as a way to expand recruitment of new ideas and interest into the region	Communication and public engagement	Implementers work group
Technical and communications assistance with TIF economic development efforts that build local capacity and can help educate voters on the risks and benefits of TIF as a driver of housing production in regional centers	Communication and public engagement	Implementers work group
Act as a recruiter to bring new multifamily developers and investors to the region by highlighting local development opportunities and incentives.	Communication and public engagement	Metro staff
Assess where brownfield grants have been effective and where we need additional funding	Communication and public engagement	Other engagement
Metro has a legacy of being anti-growth; how can Metro change the narrative to reflect changes in Council leadership and thoughts about being more pro-growth	Communication and public engagement	Member meeting

Action idea	Category	Source
Require or incentivize community co-design practices in projects receiving public funds	Communication and public engagement	Focus group
Review or evaluate the success of the protocols currently in place for affirmative marketing and consider refinements, using the State ARA based on the Seattle model as a potential jumping off spot (State ARA: Affirmative Marketing Requirement for Metro-funded units—review existing requirements and compare to the Seattle model profiled in the ARA packet, and choose something.)	Communication and public engagement	Other engagement
Metro as a regional convener for implementers and other subject matter experts – host regular communities of practice	Convening	Interview
Create a regional committees for funders, establish a statewide interagency supportive housing leadership steering committee	Convening	Previous Metro project engagement
Convene jurisdictions to discuss how to align implementing codes to streamline expectations for developers and reduce permitting burden	Convening	Metro advisory group
Assist Counties with coordinating amongst themselves and with their cities - especially when it comes to meeting housing production targets and lacking control over annexation	Convening	Other engagement
Convene region's state legislators to discuss regional needs with Metro and local elected officials	Convening	Implementers work group
Convene banks and financers for people who want to develop middle housing or ADUs	Convening	Implementers work group
Convene funders, including philanthropic organizations (there is a recurring meeting held through GAPD/Council office - Eliot mentioned this and offered to provide contact info)	Convening	Metro staff
Convene experts in modular housing to identify opportunities for Metro to support or accelerate innovation approaches that bring down the cost of multifamily development	Convening	Metro staff
Metro Council to meet yearly with cities and counties to understand the 2-3 things they are doing and where they are struggling and need more resources; would like to see Metro use our position to add urgency and local transparency	Convening	Other engagement

Action idea	Category	Source
In coordination with GAPD/Council office, engage philanthropic organizations to identify opportunities for partnerships to support housing production and equitable housing access, particularly in light of federal actions impacting funding stability and policies related to fair housing.	Convening	Other engagement
Build infrastructure for community-developer collaboration (e.g. shared planning tables, facilitation, technical assistance)	Convening	Focus group
Implement a data-driven monitoring approach to track the impact of recommendations, enabling evidence-based decision-making and facilitating continuous improvement	Data and analysis	Previous Metro project engagement
Increasing available information to help housing developers assemble clusters of parcels. *Note: LIFT through OHCS is the only consistent funding source for new CLT homes; currently and potentially in the future, we are functionally limited to one application per round/per program. But – scattered site developments in the same neighborhood can be treated as a single application.*	Data and analysis	Interview
Metro as a central resource for data through the DRC – new dashboards/metrics, regional centralized clearinghouse for resources	Data and analysis	Interview
Improve comprehensive data collection for accurate estimation of supportive housing demand	Data and analysis	Previous Metro project engagement
Add a filter for surplus tax-exempt land (publicly owned or owned by a faith based organization) on Metro Maps to facilitate affordable housing development (even without a land bank)	Data and analysis	Interview
Create a map that identifies land that would be eligible for affordable housing development under SB 8; create a publicly-owned lands inventory	Data and analysis	Metro advisory group
Compile data on available land supply	Data and analysis	Implementers work group
Assess and share market data and opportunities for different housing types on a regional level (maybe through a map). This information can be proprietary and hard to access for smaller localities interested in purchasing land for housing.	Data and analysis	Implementers work group
Track and map where people are moving and why in order to better understand gentrification; track and map housing choice	Data and analysis	Implementers work group

Action idea	Category	Source
Track and map cost burden tied to address to avoid concentrated poverty; track and map cost burden for rehabilitation or maintenance tied to address	Data and analysis	Implementers work group
Create a regional map of areas of opportunity where affordable housing development could be focused	Data and analysis	Implementers work group
Be a centralized location for the data that is required for local jurisdiction's housing capacity and needs analysis	Data and analysis	Implementers work group
Create a real time tracker that provides yearly updates on housing permit activity in the region, including detailed information about tenure, housing type, price	Data and analysis	Other engagement
Create an online public dashboard for jurisdictional development services operations - average permitting times, housing production numbers, etc - share this widely and also create incentives for high performing jurisdictions who are hitting benchmarks or outperforming; use social media to celebrate good stories; bring builders into communities they might have skewed from by showing performance improvements on dashboard; performance could be tied to additional funding opportunities	Data and analysis	Member meeting
Analyze the options for beginning to collect data on housing accessibility in the region and pick at least one method to implement in the six-year implementation period. It could be as simple as collecting accessibility information through the regional affordable housing listing service—or it could be a study, or it could be working with county assessors to implement protocols to start to collect that data routinely, or something else.	Data and analysis	Other engagement
Pass a new affordable housing bond	Funding and investment	Interview
Explore creating regional revolving loan fund for affordable housing	Funding and investment	Interview
Create a dedicated funding source for preservation of regulated affordable housing	Funding and investment	Previous Metro project engagement
Create long-term stability in funding sources, like extending the SHS measure	Funding and investment	Previous Metro project engagement
Help cities secure funding by streamlining processes, advocating for resources, and sharing information on available opportunities	Funding and investment	Interview
Investing in the TOD program that produces housing in strategic corridor locations	Funding and investment	Metro staff

Action idea	Category	Source
SHS reform to divert more funding to the creation of affordable housing	Funding and investment	Metro staff
Look at the affordability levels that are targeted in city HPSs and see if Metro can fill gaps in other ranges of needed affordability	Funding and investment	Metro staff
Explore using 2040 planning and development grants for cities looking at surplus land for housing (or willing to partner with faith based organizations looking to transfer land) - funds used for pre-development and technical assistance. Cities and faith organizations need funding for planning, due diligence, and clearing title.	Funding and investment	Interview
Use 2040 planning and development grant funds to help local jurisdictions remove regulatory barriers	Funding and investment	Metro staff
Explore incentives that Metro can offer for local jurisdictions to remove restrictions that have been identified as barriers	Funding and investment	Metro staff
Create an implementation plan for a regional land bank including land bank laws and procedures for running one	Funding and investment	Metro staff
Opportunities to purchase materials, services, to create housing at scale. What if there was some consortium for buying materials - Metro could sponsor a collaborative purchasing pool and also lower the costs of insurance and financing risks	Funding and investment	Metro staff
Acquire existing market rate building converting into affordable housing	Funding and investment	Metro staff
Create strategies that focus specifically on the 80%-120% AMI affordability level	Funding and investment	Metro advisory group
Direct funding for acquiring and converting existing properties that would be more cost-effective than new construction	Funding and investment	Previous Metro project engagement
Look for opportunities to apply a land bank strategy to a group of smaller infill parcels rather than one contiguous plot of land	Funding and investment	Interview
Fund tenant protections like regional vouchers for residents in properties with expiring affordability restrictions	Funding and investment	Previous Metro project engagement
Prioritize pre-development and land acquisition funding through grants or below-market loans to help culturally specific developers compete with larger firms	Funding and investment	Previous Metro project engagement
Evaluate and create flexible funds for essential services and rent assistance, map critical qualifications for tenancy supports	Funding and investment	Previous Metro project engagement

Action idea	Category	Source
Fund incentives for public housing authorities, prioritize chronically homeless populations, and utilize master leasing of units or incentivize creation of smaller sub-units i.e. accessory dwelling units	Funding and investment	Previous Metro project engagement
Desire to explore and support more community land trusts	Funding and investment	Metro staff
Extend allocated funding for the RHCS to the Counties for resources to complete their required plans	Funding and investment	Metro advisory group
Preserve affordable housing and retrofit units to prevent displacement of vulnerable populations	Funding and investment	City HPS
Provide ongoing grants for implementation of HPSs	Funding and investment	Implementers work group
Provide support or a line of credit for subcontracts so they can become more adept	Funding and investment	Implementers work group
Explore land banking in urban reserves for future affordable housing - new UGB areas are too expensive once land is brought into the UGB	Funding and investment	Implementers work group
Additional funding for acquisition and rehabilitation of NOAH and expiring affordable housing	Funding and investment	Implementers work group
Create an SDC assistance fund for affordable housing units, ADA units, units near frequent transit corridors, and units under 1000 SF	Funding and investment	Implementers work group
If a new transportation bond and housing is considered, pair a portion of the transportation funding with gap funding for affordable housing. Required infrastructure and fees are a substantial cost for affordable housing development	Funding and investment	Implementers work group
Voucher transferability - allow community members to take vouchers across County lines and expand eligibility	Funding and investment	Metro staff
Align funding standards across the region to simplify processes and clarify expectations for developers and providers (voucher portability, PBV standards, regional underwriting for future Metro $, operations subsidy)	Funding and investment	Metro staff
Allocate future affordable housing funds based on OHNA production targets	Funding and investment	Metro staff
Provide SHS funding to address gaps in fair housing compliance and education due to federal cuts	Funding and investment	Metro staff
Condition Metro's transportation and parks funding on performance related to local HPS as evaluated by DLCD	Funding and investment	Metro staff
Use public funds to acquire existing housing from private sector and convert to mixed income and/or PSH	Funding and investment	Focus group

Action idea	Category	Source
Expand and sustain eviction prevention funds	Funding and investment	Focus group
Create a risk pool that all project managers can access for maintenance needs	Funding and investment	Focus group
Use funding leverage to ensure jurisdictions and developers are accountable to fair housing principles in implementation, not just policy. Tie bond and SHS funding to deep affordability targets and long-term affordability commitments. Include quality controls for cultural competency and accessibility	Funding and investment	Focus group
Fund community-led research and engagement as part of fair housing planning	Funding and investment	Focus group
Fully fund resident services as a component of affordability, not just as an add-on	Funding and investment	Focus group
Develop a strategy for Metro to advance affordable housing stabilization efforts in response to industry challenges due to rising operation costs (caused by staffing shortages, skyrocketing insurance, and other factors), increased resident needs, and lack of coordination/alignment with homeless and supportive services	Funding and investment	Metro staff
Pursue new resources, programs, or opportunities for the region at the state and federal level (grants, conferences, etc.)	Legislative advocacy	Interview
Advocate for federal grant opportunities - play a proactive leading role in legislative advocacy and infrastructure funding; funding for infrastructure in UGB expansion areas is a large barrier to housing development	Legislative advocacy	Interview
Advocate for meaningful statewide revenue reform	Legislative advocacy	Previous Metro project engagement
Provide more support to cities when advocating for or against current legislation	Legislative advocacy	Implementers work group
Support legislation that allows affordable housing to not be subject to prevailing wage	Legislative advocacy	Implementers work group
Find opportunities to advocate for funding from the legislature with no strings attached (like the $5 million for investment along 82nd Ave)	Legislative advocacy	Metro staff
Advocate for state building code reforms to expand accessibility and climate resilience (e.g. elevator policy)	Legislative advocacy	Metro staff

Action idea	Category	Source
Convene jurisdictional and industry partners to develop a coordinated advocacy agenda for state and federal policy and resources. This work could be led by the Council's proposed new Housing and Homelessness Policy Advisory Committee (HHPAC) in coordination with Metro Policy Advisory Committee (MPAC).	Legislative advocacy	Other engagement
Encourage cities (and other public entities) to repurpose surplus land for housing. *Note: Habitat Portland Region has two planned developments on former Portland Water Bureau land and one on land donated by the City of Hillsboro, but these processes have been piecemeal and lengthy. Cities, school districts, and public utilities have land but need a nudge to consider letting go of an asset.*	Partnerships and collaboration	Interview
Find solutions for construction labor shortages - investment in construction to careers pathway Mass timber construction requires a lot of labor to happen at the same time (while traditional construction can phase things out over time) - this has put a big strain on past projects when you need to hire several companies worth of a certain specialist	Partnerships and collaboration	Metro staff
Evaluate regional list of barriers to housing production and identify where Metro can act	Partnerships and collaboration	Interview
More regional support for local concept planning efforts	Partnerships and collaboration	Previous Metro project engagement
Capacity-building support for smaller non-profits and culturally responsive organizations to ensure equity in accessing funds	Partnerships and collaboration	Previous Metro project engagement
Support long-term capacity-building through providing technical assistance to city/county partners, education programs/cohorts, and partnerships with universities or training institutions	Partnerships and collaboration	Interview
Create a pipeline for housing planning expertise (internships, targeted educational initiatives)	Partnerships and collaboration	Interview
Look at the entire life cycle of housing production to help fill workforce gaps - support apprenticeship programs for building inspectors or other trades people who are retiring right now	Partnerships and collaboration	Other engagement
Act as a recruiter of national middle housing builders - bring them to the region to spark new ideas. Metro can help expand the bench of developers in the region who build infill, middle housing, ADUs, etc.	Partnerships and collaboration	Implementers work group

Action idea	Category	Source
Continue to work with OHCS to coordinate, align, and streamline state and local funding.	Partnerships and collaboration	Member meeting
Develop a strategy to better align vouchers with nonprofit housing providers.	Partnerships and collaboration	Member meeting
Consult with interested Tribes that are engaged in housing development to support urban Native populations to learn more about tribal priorities, partnership opportunities, and barriers or challenges that can be addressed through Metro's work.	Partnerships and collaboration	Metro staff
Update UGMFP to be more consistent with state legislature for housing (like HB 2001) – to make it easier for cities to write findings	Regulation and regional policies	Interview
Update UGMFP Title 6 Centers and Corridors – align these requirements with CFEC	Regulation and regional policies	Interview
Align new housing efforts with existing regional goals, such as climate-friendly development, equitable TOD, and regional housing/SHS governance	Regulation and regional policies	Interview
Reinstate compliance with UGMFP Title 7 - Housing Choice; rewrite Title 7 to align with OHNA targets for cities and other legislative requirement changes	Regulation and regional policies	Metro staff
Help to Counties who do not control annexation of their land that is already within the UGB and designated for residential development. This makes housing capacity hard to rely on. Provide insights on how Counties can best meet requirements under these conditions.	Regulation and regional policies	Implementers work group
Audit housing related titles in the UGMFP for clarity and consistency and opportunities to relax regulations	Regulation and regional policies	Metro staff
Amend Title 11 of the Metro Urban Growth Management Functional Plan to establish density minimums for new urban areas	Regulation and regional policies	Metro staff
Conduct a process through MTAC and MPAC to determine whether to amend Title 14 to allow developer-led expansion proposals for smaller pockets of land.	Regulation and regional policies	Member meeting
Conduct a review of middle housing codes in the Metro area to identify similarities and differences between jurisdictions and with the State model codes/requirements. Conduct interviews with local developers for additional information. Identify impediments to the middle housing production to find opportunities to increase distribution across the region	Regulation and regional policies	Member meeting

Action idea	Category	Source
Provide a centralized regionally available pool of housing professionals that can help cities and fill staff capacity gaps - whether they provide relationships with land trusts and non-profits, help to find new affordable housing opportunities, or consult on the best ways to maintain existing affordable housing	Technical assistance	Implementers work group
Create a regional listing service for affordable housing units that includes information like rent cost, availability, unit accessibility, supportive services, and property management	Technical assistance	Metro staff
Enhance system capacity by refining assessment tools, standards of practice, and system mapping, along with improving information and referral processes	Technical assistance	Previous Metro project engagement
Provide training, education, and technical assistance to improve local planning and implementation around AFFH	Technical assistance	Interview
Provide fair housing training, implement culturally sensitive outreach, combat discrimination in housing access	Technical assistance	Previous Metro project engagement
Provide specific, actionable strategies for addressing mental health stigma in BIPOC communities, including awareness campaigns and education programs tailored to cultural nuances	Technical assistance	Previous Metro project engagement
Collect and share permit ready plans for accessible housing and middle housing types	Technical assistance	City HPS
Provide technical assistance for universal design - research and share as best practices/resources	Technical assistance	Interview
Enhance informational programs for homeowners on how they can utilize their properties for small scale development, such as ADUs	Technical assistance	City HPS
Create a database of design plans for small houses that people could pick up and submit to a local jurisdiction	Technical assistance	Implementers work group
Help match cities with developers	Technical assistance	Implementers work group
Provide resources on how to educate and guide Council when a city does not have an experienced housing developer on staff	Technical assistance	Implementers work group
Share housing production strategies with cities who have not yet done their HPS that are already on other city lists that Metro can help implement or fund.	Technical assistance	Implementers work group

Action idea	Category	Source
Develop a work program to explore alternative affordable home ownership opportunities; align with future affordable housing funding; buyer assistance programs aligned with middle housing development strategies; Research barriers and identify strategies to support multifamily home ownership strategies; Technical assistance for HOA structures; legislative advocacy	Technical assistance	Other engagement
Support landlord liaison programs and increase capacity where landlords who will waive credit score issues, criminal background, are connected with tenants	Technical assistance	Focus group

Agenda #: 2.2

File #: 25-6356 **Agenda Date:**11/6/2025

Housing Production Acceleration Strategies

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HOUSING PRODUCTION ACCELERATION STRATEGIES

Date: November 8, 2025

Prepared by: Hau Hagedorn, Community Investments Manager

Department: Planning, Development, and Research

Presenters: Malu Wilkinson, Deputy Director, PD&R Hau Hagedorn, Community Investment Manager, PD&R

Meeting Date: December 2, 2025

Length: 30 minutes

ISSUE STATEMENT

In 2024, the Governor of the State of Oregon declared a housing and homelessness crisis and set a goal of 30,000 new housing units to be produced within the State by 2035. This calls for Metro to deploy all available tools to accelerate housing production to help address the housing crisis. In the Regional Housing Coordination Strategy (RHCS) Metro identified priority actions that align with work funded by Metro's Construction Excise Tax (CET). These specific actions would make up a proposed Housing Production Accelerator Fund (HPAF).

Staff has had conversations with Councilors about three potential actions to accelerate housing production in the region. These include:

1. A one-time investment of $5M of CET reserves. This would make funding available for regional partners to advance housing development.
2. Renaming the 2040 Planning and Development Grant program and further tightening its focus on accelerating development across the region
3. Consideration of a limited duration waiver of the CET for housing production in jurisdictions that simultaneously waive system development charges (SDCs) to incentivize housing production.

Action 1 ($5M investment of CET reserves) provides a clear benefit to jurisdictions seeking to remove barriers to housing development. *Action 2* (grant program adjustments) also makes funding available for housing development and clarifies the purpose of this funding. *Action 3* (temporary CET waiver) could send a message to the market and jurisdictional partners that Metro is deploying all available tools to support housing production in our region. However, the actual benefit to developers is low. With a maximum fee of $12,000 per project (often significantly less), the CET is small compared to other taxes, fees and system development charges. As a result, the actual benefit to developers of waiving the

CET is low. Implementing a waiver for only housing projects also adds complexity for the local jurisdictions that collect the tax.

ACTION REQUESTED
Staff requests Council guidance on the potential actions to accelerate housing production to be implemented through a Council resolution to be considered early in 2026.

IDENTIFIED POLICY OUTCOMES

2040 Grant Program
The purpose of the 2040 Planning & Development Grant program is to fund planning work in the region that supports our regional vision for growth. The grants are funded through the construction excise tax (CET), which was established in 2006 for the purpose of funding regional and local planning. The grants are intended to facilitate planning that makes land ready for development, supports economic prosperity, and implements Metro's long-term plan for livable communities, as outlined in the 2040 Growth Concept.

Regional Housing Coordination Strategy
Directed by the new requirements under the Oregon Housing Needs Analysis (OHNA) program, Metro is required to adopt a Regional Housing Coordination Strategy (RHCS) every six years. The RHCS identifies the actions Metro will take over the next six years to advance housing production, access to opportunity, affordability, and choice in greater Portland. This strategy emphasizes Metro's critical role in advancing regional solutions and supporting the efforts of cities and counties in accelerating housing production. Though Metro does not zone land or build homes, Metro plays an important part in helping to create the conditions for success, addressing the gaps in capacity and resources, and supporting coordination.

Impact of the requested action
Creation of the HPAF would help implement actions identified in the Regional Housing Coordination Strategy, supporting local jurisdictions in their housing production targets and removing barriers to housing development. The fund would support the following activities to accelerate housing production in the region:

- **Housing pre-development and technical assistance.** Fund pre-development activities necessary to unlock public properties and other properties where an owner is interested in developing affordable housing, but lacks the knowledge and expertise required. This type of technical assistance can offset costs for land use studies and other pre-development activities including site surveys, feasibility studies, area plans and other activities that prepare sites for development. In addition, this action can provide grants to local jurisdiction staff to support activities that accelerate permit reviews, provide contracted services for cities and counties to expedite permit reviews, site suitability studies to identify sites ready for housing

development, and update development standards and procedural requirements to remove barriers and delays in permitting.

- **Expand the brownfield grant program.** Expand resources available for brownfield assessment and explore grant opportunities for small scale remediation that leads to middle housing and multi-family housing development. Funding for Brownfield site assessment complements existing federal grants to support additional sites that otherwise would not be able to access Metro's current site assessment program.

- **Support local Housing Production Strategy (HPS) implementation.** Assist cities and counties with approved Housing Production Strategies to meet their housing production targets with grants to help implement actions that are consistent with allowable uses for CET funds identified within the Metro Code.

- **Technical assistance to support planning and implementation of housing production, affordability and choice.** Identify and provide a pool of technical assistance, on-call experts to support jurisdictions with non-site specific planning and implementation activities that that result in housing production or funding for staff that enables jurisdictions to process more permits for housing.

- **Explore regional land bank strategies.** This effort will explore land banking activities in the region and develop a plan for a regional land bank that identifies the necessary legal framework, governance structures, and operational guidelines to support cross-sector collaboration and investment.

Budget needs

Creating the HPAF would require Metro staff time for implementation. Managing an effective grant program that achieves goals defined by the Metro Council necessitates dedicated staff. PD&R staff would work with the COO to design and implement the grant and technical assistance programs through amending the CET Administrative Rules and identifying any needed Metro Code changes.

POLICY QUESTION(S)

- Does the Metro Council support allocating $5M from the Construction Excise Tax fund balance to create a Housing Production Accelerator Fund (HPAF)?
- Would the Metro Council like to direct a refocus and renaming of the 2040 Planning and Development Grants to support development readiness?
- Would the Metro Council like to implement a limited duration waiver of the CET for housing projects in jurisdictions that have implemented a waiver of SDCs for housing?

BACKGROUND

Construction Excise Tax (CET) history

In 2006, the Metro Council enacted the CET to generate revenue for planning work by local governments in areas where the UGB has been expanded. The CET was vigorously opposed by the Homebuilders Association, and in 2007 the HBA helped get a bill passed in Salem that prohibited local governments from adopting new CETs. Because Metro's tax was enacted prior to the 2007 legislation, it was exempted from the statewide prohibition on new CETs. In 2016, the state law was amended to allow cities and counties (but not Metro) to exist by virtue of pre-dating the 2007 state law.

The scope of Metro's allowable uses for CET funds has expanded over the last 20 years as regional planning needs have evolved. Today this relatively low tax provides critical program funding for Metro's 2040 Planning and Development and Community Placemaking grants. Grants and technical support go to local jurisdictions and non-profit organizations to support economic development and community stabilization.

CET rate

The CET rate is 0.12% (0.12 cents per dollar) and applies to new housing construction or major renovations above $100K. It is collected by local jurisdictions and turned over to Metro. Affordable housing projects and non-profit organizations are exempt. The program generates approximately $3.6M annually; we do not know exactly how much of this comes from the development of housing, but we estimate about 50%. Of all jurisdictions in the region, the City of Portland produces the largest amount of CET revenue - over $1M each year. Due to the low tax rate and $12K maximum cap, CET collections are a very small portion of the total fees imposed on new housing development throughout the region. For example, a new single-unit home with an improvement value of $500,000, the CET would amount to $600.

Table 1: CET Rates and Exemptions

Rate	0.12% (.0012)
Applied to	New construction or major renovations ($100K or more)
Maximum tax liability	$12K (this reflects the tax on a $10M construction project; .0012 x $10M) • Due to the cap, any project over $10M (e.g. a $200M project) would have a tax liability of $12K • A $5M project would have a tax liability of $6K • A $100K project would have a tax liability of $120 • Any project under $100K has no CET liability
Exemptions	• Construction valued at less than $100K • Affordable housing (60% AMI) • Any tax-exempt organization

Agenda #: 2.3

File #: 25-6338 **Agenda Date:**12/2/2025

2026 State Legislative Agenda

Anneliese Koehler (she/her), Legislative Affairs Manager
Kyung Park (he/him), State Affairs Advisor

2026 STATE LEGISLATIVE AGENDA

Date: November 10, 2025
Department: GAPD
Meeting Date: December 2, 2025
Prepared by: Kyung Park, State Affairs Advisor

Presenters: Anneliese Koehler, Legislative Affairs Manager; Kyung Park, State Affairs Advisor
Length: 45 minutes

ISSUE STATEMENT
This work session is an opportunity to discuss Metro Council's objectives for the 2026 Oregon legislative session that will begin on February 2, 2026. The current political climate and proposed legislative priorities will be discussed. This will be the final work session prior to final adoption of Council's Legislative Priorities and Principles in early January.

ACTION REQUESTED
The Council may wish to discuss specific legislative concepts or principles or direct staff to develop additional legislative concepts before adopting its legislative agenda prior to the start of the 2026 legislative session.

IDENTIFIED POLICY OUTCOMES
Support Metro's policy goals through engagement with the Oregon State Legislature.

POLICY QUESTION(S)
- Does the Council wish to confirm or change existing policy direction under which staff is currently operating with respect to issues that are likely to surface in 2026?

- Are there additional topics for which the Council would like to adopt legislative positions?

POLICY OPTIONS FOR COUNCIL TO CONSIDER
Council's Legislative Principles, Council's Legislative Priorities and issues sheet for potential 2026 Legislative Priorities are attached.

STAFF RECOMMENDATIONS
See individual issue sheets, Council's Legislative Principles and Council's Legislative Priorities.

STRATEGIC CONTEXT & FRAMING COUNCIL DISCUSSION
2026 session
The 2026 Legislative session is a short session lasting roughly a month. Unlike long sessions, short sessions focus on necessary budgetary tweaks, passing technical fixes and a few pieces of policy legislation. It is uncommon for large, controversial pieces of legislation or significant budget changes to occur. Many parties approach the short session with only

one or two minor bills. The session is also deliberately structured to be limited as legislators are only allowed to file a small number of bills.

Elections
The 2026 election will impact the 2026 legislative session as legislators begin to seriously contemplate running again, seeking other offices, or retiring from the Legislature. There are some changes that we are aware of already. There will be additional changes in the Senate stemming from the 2023 walkout. As a result of the walkout, ten Senate Republicans were ineligible for reelection. Six senators were replaced in 2024 and the remaining four will be replaced in the 2026 election. Of the remaining four, two are considered competitive districts. In addition, one of those four, Senator Bonham, announced his resignation effective October 5. County commissioners appointed Rep. Christine Drazen to fill the vacancy. Additionally, Rep. Anessa Hartman, Rep. Ken Helm, and Rep. John Lively will not be seeking re-election in 2026. As we approach the 2026 session, we anticipate additional retirements from the Legislature.

The Governor and Oregon Bureau of Labor and Industries Commissioner are also up for re-election in 2026. Those seats are both held by incumbents that staff anticipates will run again.

Legislature overview
The Legislature continues to experience turnover in leadership with a newly elected Senate Minority Leader and House Minority Leader. After Senator Bonham announced his resignation, the caucus elected Senator Bruce Starr as the new Senate Minority Leader. Then House Minority Leader Christine Drazan was appointed to Senator Bonham's seat, creating a vacancy in House Republican leadership. Rep Lucetta Elmer from McMinnville is the new House Minority Leader.

The Metro region is well represented in legislative leadership. Senate President Wagner, Senate Majority Leader Jama and House Majority Leader Bowman all reside in our region. Both co-chairs of ways and means are also from our region.

The Metro region will also have two new Representatives for the short session. Rep Hoa Nguyen passed away this fall and is replaced by Lamar Wise. Rep Christine Drazan moved over to the Senate and the process to replace her seat will be held on November 17.

Until September of 2025, the Democrats held an exact three-fifths super majority in both chambers. This is threshold for revenue raising votes but falls shy of the two-thirds necessary to achieve quorum. In September, Rep Javadi switched his party affiliation from Republican to Democrat. This increases the margins in the House for Democrats.

The Oregon State Capital building is still under construction and is not slated for finish until 2027. While what portions of the building will be closed down for the 2026 session is still being determined, staff anticipates that it will be similar to prior sessions with cramped corridors, large parts of the building inaccessible and constant construction noise. This continues to make the legislative process challenging.

Revenue Forecast
The September 2025 revenue forecast projected a shortfall of approximately $888 million dollars in revenue for the current 2025-2027 fiscal year. This is due to federal tax code changes from H.R. 1. Oregon has a rolling connect policy that ties Oregon's tax code to the federal tax code. Legislators had set aside $472 million at the end of the 2025 session, but this buffer quickly evaporated and left a deficit of $373 million for legislators to tackle during the 2026 session. In mid-September, Governor Kotek directed all state agencies to slow all spending by holding vacant positions open longer, reducing spending on supplies and services, slowing down implementation of new programs, and reducing all out of state travel costs for conferences and trainings. In addition, all state agencies have been asked to present 5 percent budget cut scenarios.

Legislative session priorities
Staff anticipates that revenue and budget conversations will dominate the 2026 short session. The cuts to federal programs and revenue shortfall will lead to difficult conversations and budget cuts across the board.

BACKGROUND
Council adopts a State Legislative Agenda and State Legislative Principles annually. This is the second meeting to discuss the next iteration of Council's legislative priorities and principles. It is the final work session prior to adoption in early January.

ATTACHMENTS

1. 2026 State Legislative Principles (DRAFT)
2. 2026 State Legislative Priorities (DRAFT)
3. Speculative ticketing issue sheet
4. Transportation issue sheet
5. Housing and homelessness issue sheet
6. Serial communications issue sheet
7. Food and beverage issue sheet

METRO COUNCIL 2026 LEGISLATIVE PRINCIPLES[1]

GENERAL PRINCIPLES:

1. **Successful Communities:** Metro supports policy and funding solutions that facilitate the achievement of the six desired outcomes for successful communities that have been agreed upon by the region: vibrant, walkable communities; economic competitiveness and prosperity; safe and reliable transportation choices; leadership in minimizing contributions to climate change; clean air, clean water and healthy ecosystems; and equitable distribution of the burdens and benefits of growth and change.[2]

2. **Racial Diversity, Equity and Inclusion:** Metro envisions a region and state where a person's race, ethnicity or zip code does not predict their future prospects and where all residents can enjoy economic opportunity and quality of life. Metro therefore supports legislation that acknowledges past discrimination, addresses current disparities and promotes inclusion in public programs, services, facilities and policies.[3]

3. **Tribal Sovereignty**: Metro seeks to support tribal sovereignty through government-to-government relations and coordination with Tribes, exploring opportunities to incorporate tribal interests and priorities into Metro's work and ensuring agency compliance with pertinent cultural, historic and natural resource protection laws. Metro will not supplant any Tribe or tribal organization's efforts on legislative priorities and will strive to coordinate with legislative and policy representatives of Tribes, Tribal organizations and Indigenous legislators to determine if Metro's involvement on any legislative priorities is appropriate.

4. **Climate Justice:** Metro supports efforts to combat and adapt to climate change and to meet the state's goals for reducing greenhouse gas emissions. To this end, Metro supports state policy and funding solutions that can help to reduce emissions in all of its main lines of business: land use and transportation planning and investment, housing and homeless services, consumption, waste management and solid waste management, parks and natural areas, and operation of visitor venues.

5. **Vibrant Sustainable Workforce.** Metro supports a thriving and equitable regional economy that creates job and career opportunities for all people. To this end, Metro supports state policy and investments that create new career opportunities and remove barriers to career opportunities to meet the demand for a skilled and diverse workforce in Metro's lines of business and in the region, including initiatives that promote quality training, family sustaining wages, access to career ladders and the provision of workforce wraparound services, and incentives to promote economic adaptability and mobility.

6. **Preemption:** With respect to issues related to matters of regional concern, Metro's policy and funding authority should not be preempted or eroded.

DRAFT

7. **Funding:** To ensure a prosperous economy, a clean and healthy environment, and a high quality of life for all of their citizens, Metro and the region's counties, cities, and other service providers must have the financial resources to provide sustainable, quality public services. Accordingly, the Legislature should remove existing restrictions on local and regional revenue-raising authority and avoid enacting new limitations or pre-emptions, and all state mandates should be accompanied by funding.

SPECIFIC PRINCIPLES:

HOUSING:

8. **Affordable Housing and Homelessness:** Metro supports efforts to ensure that housing choices are available to people of all incomes in every community in our region; to reduce the number of households that are burdened by the combined costs of housing and transportation; to support people experiencing homelessness or at risk of losing housing; and to increase affordable opportunities for home ownership.[4] To achieve these outcomes, Metro supports legislative actions consistent with Oregon's land use laws that increase the supply of both regulated affordable housing and market-rate housing; provide funding for both housing development and services that support lower-income renters and people experiencing homelessness; and provide reasonable protections for renters against arbitrary and unfair actions.

LAND USE AND URBAN GROWTH MANAGEMENT:

9. **Oregon's Land Use System:** Oregon's land use planning system provides an important foundation for the prosperity, sustainability and livability of our region; this system reflects the values of Oregonians and enjoys strong public support. The Legislature should exercise restraint and care when considering changes to Oregon's land use system.

10. **Local Land Use Decisions:** Management of the urban growth boundary is a complex undertaking that involves extensive analysis, public input, and a balancing of many factors. Urban growth management decisions have profound impacts not just on land at the boundary, but on communities within the boundary and on farms and other rural lands outside the boundary. For these reasons, the Legislature should establish the process and policy framework for local land use decisions and should affirm the authority of local governments, including Metro, to make specific decisions on local land use matters.

11. **Efficient Use of Existing Urban Land:** Land within the urban growth boundary should be used efficiently before the boundary is expanded.[5] Metro supports policy and funding strategies to facilitate efficient use of existing urban land, including investments in brownfield cleanup and industrial site readiness, as well as policy and zoning reforms that authorize and/or encourage more efficient development in residential and commercial areas.

12. **Need:** The UGB should not be expanded in the absence of demonstrated need.[6]

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13. **Integration of Land Use and Transportation:** Land use and transportation planning should be coordinated so land uses do not undermine the efficiency and reliability of the transportation system and transportation investments do not lead to unintended or inefficient land uses.[7]

14. **Annexation:** Cities are the preferred governing structure for providing public services to urban areas, and Metro supports reforms that will facilitate, or reduce barriers to, orderly annexation and incorporation.

15. **Fiscal Responsibility:** Funding to support urban development should be generated at least in part by fees on those who directly benefit from that development.

SOLID WASTE:

16. **Life Cycle Approach:** Metro supports efforts to minimize the health, safety, environmental, economic and social impacts associated with consumer products and packaging throughout all stages of a product's life cycle, beginning with resource extraction and continuing through design, manufacturing, consumption and disposal.[8]

17. **Product Stewardship/Producer Responsibility:** Metro supports legislation providing that whoever designs, produces, sells or uses a product bears responsibility for minimizing the product's environmental impact throughout all stages of the product's life cycle. Under this market-based approach, the life-cycle costs of a product are internalized into its price rather than being forced onto the general public. This approach also provides an incentive for manufacturers to design and produce their goods in a way that minimizes waste, environmental impact and management costs.

18. **Equity in the Solid Waste System:** The Regional Waste Plan aims to eliminate disparities experienced by people of color and historically marginalized communities from the full life cycle of products and packaging used and disposed in the region. Metro supports legislation that achieves this by advancing: community restoration, community partnerships and community investment; access to recycling, waste and reuse services and information; good jobs with improved worker health and safety, compensation and career pathways; business opportunities in the local economy; and community health through minimized impacts from system operations - locally and in end markets - and from toxic chemicals in products and packaging. Legislation should require the establishment of targets, standards and compliance processes, as appropriate, to ensure progress toward equity goals.

TRANSPORTATION:

19. **Transportation Funding:** Providing adequate funding for all transportation modes that move people and freight supports economic prosperity, community livability, public health and environmental quality. For these reasons, Metro supports an increase in overall transportation funding, investments in a safe and balanced multimodal transportation system that addresses the needs of all users, and flexibility in the system to provide for local solutions to transportation problems.

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20. **Climate Justice:** Metro and its regional partners are committed to the Climate Smart Strategy, which includes actions needed to achieve state targets for reducing greenhouse gas emissions from transportation. The state should provide financial support for implementation of the Climate Smart Strategy.

21. **Safe and Equitable Transportation:** Our region has adopted policies and developed programs to make it safer to walk and bike to school and other destinations, reduce serious traffic crashes and deaths, and reduce the disproportionate impact of traffic crashes and traffic enforcement in low income communities and communities of color.[9] Metro supports legislation that advances safe and equitable transportation, including more effective and equitable enforcement of speed limits and other safety regulations, greater investment in infrastructure that improves safety (especially in disadvantaged communities), and greater authority for local governments to safely manage their transportation networks.

PARKS, NATURE AND CONSERVATION:

22. **Parks and Natural Areas:** Our region has invested heavily in protecting water quality and fish and wildlife habitat and providing residents with access to nature and outdoor activity. Parks and natural areas are regional assets that support public health, environmental quality, strong property values and economic prosperity. For these reasons, Metro supports measures to increase local and regional authority to raise revenues to support parks and natural areas and to increase the level of state funding distributed to local governments for acquisition, capital improvements, and park operations.

23. **Species Conservation:** Metro supports efforts to protect and restore fish and wildlife habitat, to recover threatened and endangered species, and to create a better future for fish and wildlife, both in Oregon and globally.

24. **Conservation Education:** Metro supports efforts to provide stable and reliable funding to conservation education.

ECONOMIC PROSPERITY:

25. **Metro Venues:** Because the Oregon Convention Center, Expo Center, Portland'5 Centers for the Arts and Oregon Zoo contribute millions of dollars to the state and regional economies, Metro supports policy and funding solutions that facilitate the success of these venues in attracting visitors and enhancing the quality of their experiences.

AGENCY OPERATIONS:

26. **Firearms and Public Facilities:** Metro supports legislation that increases Metro's authority to regulate the carrying of firearms on Metro properties and public venues, and opposes legislation that limits or reduces that authority.

27. **Disaster Resilience:** Metro supports legislative efforts to improve community disaster preparedness and resilience, with the goal of enabling the Portland region to provide for the

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immediate needs of its residents and businesses after a catastrophic event and facilitating the region's short- and long-term recovery.

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[1] Unless otherwise noted, endnotes refer to applicable policy statements in Metro's Regional Framework Plan (RFP).

[2] RFP Chapter 1 (Land Use).

[3] Strategic plan to advance racial equity, diversity and inclusion.

[4] RFP Policy 1.3 (Housing Choices and Opportunities).

[5] RFP Policy 1.1 (Compact Urban Form).

[6] RFP Policy 1.9 (Urban Growth Boundary).

[7] RFP Policy 1.3.13 (Housing Choices and Opportunities); Transportation Goal 1 (Foster Vibrant Communities and Efficient Urban Form).

[8] 2030 Regional Waste Plan, page 11.

[9] 2018 Regional Transportation Plan, Chapter 3, Safety and Security Policies 1-9 and Transportation Equity Policies 1-7.

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METRO COUNCIL LEGISLATIVE PRIORITIES
2026 Legislative Session

Metro

GENERAL GOVERNMENT

- **Serial communications:** Support changes to the public meetings law to clarify prohibited serial communications and serial meetings. Reduce confusion for elected officials regarding compliance while ensuring transparency in decision making by governing bodies.

- **Food and Beverage:** Support exceptions to requirements that food and beverage offerings be formally included as part of official compensation packages. The current requirements prohibit members of some advisory committees and commissions from accepting food and beverage during meetings that can occur during regular meal times. Support legislation that allows reasonable food and beverage offerings by the public body during these meetings and other official events.

- **Protecting Critical Services:** To ensure a prosperous economy, a clean and healthy environment, and a high quality of life for all their constituents, the state, Metro, and the region's counties, cities, and other service providers must have the financial resources to provide sustainable, quality public services. Accordingly, when dealing with financially constrained budgets, the Legislature should avoid cutting critical services.

HOUSING AND HOMELESSNESS

- **Housing and Homelessness Response Stability:** Support legislation that protects the stability of regional and local housing and homelessness systems. Support efforts that offer permanent, affordable housing for individuals and families experiencing or at risk of homelessness and provide supportive services and community-based support people need to keep their housing. Additionally, support ways to stabilize and preserve the affordable housing stock.

LAND USE

- **Urban Growth Management:** Ensure that the Legislature establishes the policy framework and process for local land use decisions and respects the authority of local governments, including Metro, to make specific decisions on local land use matters. Oppose efforts to legislatively determine specific land use designations in the region or to distort the process of assessing land need by mandating inaccurate analysis.

TRANSPORTATION

- **Transportation Package:** Support efforts that build on the 2025 Transportation Funding Bill, lay the groundwork for a 2027 transportation package, and advance the 2025 JPACT priorities: addressing short-term funding solutions, long-term sustainable funding, finishing what we started, safe urban arterials and streets, transit investments, and resiliency.

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WASTE MANAGEMENT AND WASTE REDUCTION

- **Battery Extended Producer Responsibility:** Support legislation that creates a battery extended producer responsibility program in Oregon.

VENUES

- **Speculative Ticketing:** Support legislation that bans speculative ticketing, protecting consumers and artists from deceptive ticketing practices.

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METRO 2026 LEGISLATIVE ISSUE IDENTIFICATION

Person completing form/Department: Anneliese Koehler, GAPD
Date: October 20, 2025

ISSUE: Speculative ticketing

BACKGROUND:
Speculative ticketing
With the rise of secondary marketplaces to sell event tickets, there has been a corresponding increase in speculative ticketing. Speculative ticketing is when entities or individuals list tickets for sale that they don't have in their possession. These sellers are wagering that they can purchase tickets at a lower price and make money on the price difference. Speculative ticketing can occur prior to the event tickets being on sale or while they are on sale.

It is not uncommon to find tickets to Portland'5 events for sale on secondary marketplaces before the official on-sale date. For example, in early November, tickets to the comedian Matteo Lane were for sale on Vivid Seats before tickets went on sale. These tickets were priced at double face value.

There is no data that illustrates the size and scope of this issue. By and large, many consumers who buy speculative tickets are unaware and attend events with no issues, though in likely every case they paid above face value. However, there are instances where, because of speculative ticketing, buyers are denied event entry because the ticket is not valid, believe they were meant to be in one section and find out that they are in another, or receive a last-minute cancellation due to the buyers' inability to secure tickets.

Portland'5 regularly supports patrons arriving to performances only to find out their ticket is not valid. Sometimes this is because the broker or reseller sold speculative tickets and was unable to secure actual tickets. In the best case, patrons can purchase a legitimate ticket and try to get a refund for the fraudulent ticket. The worst case is that tickets are not available at the door or that the patron is not able to afford to purchase a seat twice, and they leave without having experienced the performance.

The federal government and several states have taken legislative steps to address speculative ticketing. The U.S. House of Representatives passed the TICKET Act in April 2025 which would ban the selling of tickets that the seller does not yet possess. The U.S. Senate has yet to take up the bill. In recent years, Nevada, Maryland, Minnesota and Maine have all passed speculative ticketing bans.

RECOMMENDATION:
Support legislation that bans speculative ticketing, protecting consumers and artists from deceptive ticketing practices.

LEGISLATIVE HISTORY:
In 2025, the Legislature passed HB 3167, a bill aimed at increasing transparency and protecting consumers when purchasing event tickets. The bill prohibits the use of bots for event ticket sales and bans misleading marketing tactics, including the unauthorized and misleading use of venue logos, branding, and website names. Earlier versions of the bill contained speculative ticketing ban and this, and other pieces, were taken out as a part of the negotiations with the secondary marketplaces.

OTHER INTERESTED PARTIES:
Interested parties include Britt Festival, Independent Venues Coalition, National Independent Venues Association, LiveNation, StubHub, Seat Geek and other secondary marketplaces.

IMPACT IF PROPOSED ACTION OCCURS:
Speculative ticketing bans are too recent in other states to have a full evaluation of their impact and enforcement can be challenging. However, banning speculative ticketing will help increase transparency and give additional legal avenues for consumers.

RACIAL EQUITY IMPACTS
Speculative ticketing often results in higher prices for events. Consumers can pay a premium for an event they would like to attend. In addition, speculative ticketing also can result in counterfeit tickets and last-minute cancellations. All of this can have a disproportionate financial impact on lower income communities which are overrepresented by Black, Indigenous and People of Color.

CLIMATE IMPACTS
No climate impact.

METRO 2026 LEGISLATIVE ISSUE IDENTIFICATION

Person completing form/Department: Anneliese Koehler, GAPD
Date: November 13, 2025

ISSUE: Transportation Package

BACKGROUND:
Oregon's transportation system is experiencing significant funding challenges. Oregon relies on three main revenue sources to fund the State Highway Fund: gas tax, vehicle fees, and heavy truck fees. Historically, these sources have provided adequate funding for the state and local transportation system. Today, those funding sources are not keeping pace with the need. State and local governments are facing a steep fiscal cliff and are unable to support the maintenance, operations and safety of their transportation systems. Declining gas revenue, high inflation and restricted funding are all contributing factors to the current transportation funding crisis.

Transit providers are also facing financial challenges. Rising costs and less funding collected from fares mean that transit expenses exceed revenue and transit agencies are facing a similar fiscal cliff.

Facilitated through JPACT, Metro staff worked with jurisdictional partners over 2024 and 2025 to develop transportation priorities and coordinate advocacy efforts. Metro staff planned a similar effort for Metro Council and both bodies adopted the same legislative priorities in anticipation of the 2025 session.

RECOMMENDATION:
Support efforts that build on the 2025 Transportation Funding Bill, lay the groundwork for a 2027 transportation package, and advance the 2025 JPACT priorities: addressing short-term funding solutions, long-term sustainable funding, finishing what we started, safe urban arterials and streets, transit investments, and resiliency. JPACT priorities are attached below.

LEGISLATIVE HISTORY:
Historically, the Oregon Legislature passes a large transportation package every decade. These packages focus on solving issues of that decade. In 2009, coming out of the Great Recession, the package focused on jobs and growing the economy. In 2017, among other issues, the package focused on solving critical statewide congestion and investing in transit operations for the first time.

The Oregon Legislature considered a transportation package in the 2025 session. The Governor and Legislative leadership committed to passing a package that was focused on back to basics: solving state and local transportation agencies' fiscal cliffs, addressing operations and maintenance, finding an ongoing source of sustainable revenue, and completing unfinished projects from HB 2017. Despite multiple attempts in the final weeks of session, the Legislature failed to pass a package.

To avoid immediate layoffs at ODOT, over the summer and early fall, the Governor called the Legislature into a special session. HB 3391 passed the House on September 1 and the Senate on September 29. It was framed as a band-aid solution, meant to temporarily stop layoffs and fund necessary transportation operations and maintenance needs. Initial estimates indicate that it could generate north of $4.3b over ten years. For context, that puts it below the $5b transportation package in 2017 as well as about 1/3 and 1/2 the size of the packages contemplated in 2025.

HB 3391 provided operations and maintenance funding for state and local governments, made the road user charge mandatory for electric and hybrid vehicles, and provided a temporary two-year increase to payroll tax for transit. It did not provide funding for HB 2017 major projects, Safe Routes to School, Great Streets, Oregon Community Paths, and electrification of vehicles.

OTHER INTERESTED PARTIES:
State and local government partners, freight interests, business interests, transportation advocates and environmental advocates.

IMPACT IF PROPOSED ACTION OCCURS:
State and local governments and transit agencies have additional funding to provide basic transportation services to their constituents. Oregonians will likely experience the transportation system as they have over the past decade and will not see a decline in the system.

RACIAL EQUITY IMPACTS
The racial equity impacts of the transportation funding will depend on the components, how programs are implemented, and which projects are chosen. BIPOC members are disproportionally impacted by transportation disinvestment and safety issues. On our roadways, BIPOC members are more likely to be killed in a traffic crash and experience other types of violence. 76 percent of pedestrian deaths occur in the communities in our region where more BIPOC, people with lower incomes and people with limited English proficiency live. This is especially true for Black people: in 2020, Black people accounted for 18.5 percent of traffic deaths in Portland, three times higher than residents' share of Portland's population. Transportation solutions that focuses on basic maintenance and safety projects like sidewalks, better lighting, and crosswalk and intersection improvements are critical to protecting BIPOC community members and reducing disparities. Ensuring that those investments are in BIPOC communities, that additional projects are located BIPOC communities, and increased investments in transit are also critical to advancing racial equity.

CLIMATE IMPACTS
The climate impacts of additional transportation funding will depend on the components, how programs are implemented, and which projects are chosen. Shifting people out of cars and into walking, biking and transit is one of the strongest transportation strategies we have for

combatting climate change and reducing GHG. Solutions that prioritize increased investments in transit, walking, and biking will be critical to meet our state and region's climate goals. Statewide Transportation Improvement Fund, Safe Routes to School, Great Streets, and Oregon Community Pathways are all crucial programs that improve safety and improve climate outcomes. Additionally, even with increased mode shift, people will still drive cars. Increased investments in electrification infrastructure and incentives for electric vehicles are needed to help meet climate goals.

Memo

Metro
600 NE Grand Ave.
Portland, OR 97232-2736

Date: October 17, 2024

Subject: JPACT Priorities for the State 2025 Transportation Package

Purpose: A shared position statement that describes the Joint Policy Advisory Committee on Transportation's (JPACT) transportation values and priorities. This statement will be the foundation for our comments and engagement in processes leading up to a 2025 transportation funding package.

Background: JPACT's 2025 State Transportation Package values and priorities are rooted in conversations to date with regional partners and the 2023 update to the Regional Transportation Plan, which is a blueprint to guide investments for all forms of travel – motor vehicle, transit, bicycle and walking – and the movement of goods and freight throughout the Portland metropolitan region. The plan identifies current and future transportation needs and investments, and outlines what funds the region expects to have available over the next 25 years. The plan is updated every five years with input from community members, business and community leaders and governments as an opportunity to work together towards a future with safe, reliable and affordable travel options for all.

JPACT Priorities for a State 2025 Transportation Package:
The Portland metro area wants a safe, reliable, equitable, healthy and stable transportation system that is environmentally responsible, efficiently moves people and products to their destinations, and ensures all people can connect to the education and work opportunities they need to experience and contribute to our region's and state's economic prosperity and quality of life.

The Portland metro region accounts for more than 40 percent of the state's population. Our region continues to evolve -- working, shopping, and traveling in new ways that require expanded transportation options and solutions. Technological changes in transportation, communication and other areas are radically altering our daily lives. We are also facing urgent global and regional challenges: climate change is happening faster than predicted, and the transportation system is not fully prepared for the expected Cascadia Subduction Zone earthquake. Economic vitality and recovery depend very much on the efficiency and reliability of our transportation system, and we lack the funding at the state and local level to respond to these opportunities and challenges. For an export dependent state like Oregon, a resilient intermodal transportation system is especially critical to ensure local businesses can get their products to market. Intermodal transportation and marine highways offer a sustainable alternative for moving goods and improving overall freight mobility.

We are at a pivotal moment. As the region continues to emerge from the disruptions of the pandemic and respond to other urgent trends and challenges, the 2025 transportation package provides an opportunity for all levels of government and community to work together to deliver a better transportation future.

Our communities need:

- Short-Term Funding Solutions. Stabilize our existing state and local transportation system funding sources so we can prioritize the operations and maintenance of our existing facilities. Retain the existing 50/30/20 State Highway Fund revenue split.

- Long-Term Sustainable Funding. Invest in developing long-term, sustainable revenue solutions to provide much needed state and local operations and maintenance dollars for multi-modal investments into the future. Ensure that local agencies continue to receive a proportional local share (50/30/20) of all state collected transportation revenues. Ensure local agencies maintain and expand taxing authority for new types of funding.

- To Finish What We Started. Build government trust and accountability by ensuring the successful completion of the major bottleneck projects in the Portland metro region as promised by HB 2017.

- Safe Urban Arterials and Streets. Continue to invest in state programs that reduce fatal and serious injuries on our roadways and improve conditions on our most dangerous urban arterials. These investments should prioritize critical infrastructure improvements for all roadway users, and in major travel corridors with developing housing and job opportunities.

- Transit. Fund transit capital and operations, providing necessary solutions for expanding transit access statewide to make transit an easily accessible, attractive and equitable travel option.

- Resiliency. Ensure that our critical transportation infrastructure like airports and bridges are able to withstand large scale, known and unknown, climate and natural disasters. Plan, adapt and build climate resilient infrastructure responsive to the evolving needs of future generations.

JPACT members agreed to these priorities during the October 17, 2024 JPACT meeting. We are all committed to advancing robust and meaningful programs. Together we can create legislation that responds to the evolving economic and environmental needs across the state.

METRO 2026 LEGISLATIVE ISSUE IDENTIFICATION

Person completing form/Department: Kyung Park, GAPD
Date: November 13, 2025

ISSUE: Housing and Homelessness Response Stability

BACKGROUND:
The legislature made significant investments to address homelessness and housing affordability since 2016. After record levels of investments in the 2023-2025 biennium, investments in housing and homelessness were scaled back in the 2025-27 biennium as the economic conditions of the state shifted. Some programs were more impacted than others. Shelter operations were nearly fully funded and significant bonding resources were dedicated to affordable housing development.

On the other hand, state investments in eviction prevention was reduced by 74%, which put 20,000 households at risk of experiencing homelessness. Due to the interconnected nature of the housing services continuum, underfunding eviction prevention will likely lead to more demand for homelessness and shelter services and increased vacancy of housing units. In turn, higher vacancy rates increase financial risk for affordable housing properties with less rental revenue.

Federal funding sources for housing are also at risk. A plan released in November by HUD outlines a shift away from Housing First to programs that prioritize work requirements and drug treatment mandates. If implemented, service providers may experience additional burdens when accessing federal grants.

In the 2026 session the legislature will consider budget reductions, scaling back housing programs, and policy changes to boost housing production.

RECOMMENDATION:
Support legislation that protects the stability of regional and local housing and homelessness systems. Support efforts that offer permanent, affordable housing for individuals and families experiencing or at risk of homelessness and provide supportive services and community-based support for people that need to keep their housing. Additionally, support ways to stabilize and preserve the affordable housing inventory.

LEGISLATIVE HISTORY:
Since 2016, the Legislature has increasingly focused on housing accessibility, enacting a series of bills to protect tenants from displacement, funds for shelter and wraparound services, address racial disparities in home ownership, and facilitate and fund housing development. Recent legislation that support housing and homelessness:

- **SB 611 (2023)** keeps Oregon's current rent stabilization law intact, with the addition of a 10 percent rent increase cap.
- **HB 3414 (2023)** would have allowed cities to petition Metro for residential urban growth boundary expansions in urban reserves once (per city) in the next ten years. The bill required that 30 percent of the housing be affordable (as defined by the bill), minimum densities, and a conceptual plan for development. This bill failed on the Senate floor on the last day of session.
- **HB 2001 (2023)** was the 60-day housing package included the new Oregon Housing Needs Analysis methodology. It prioritizes planning for housing that is needed at various affordability levels and state and local government working towards housing goals together with urgency.
- **HB 2889 (2023)** fixes ambiguities and technical errors included in HB 2001 related to the Oregon Housing Needs Analysis. For Metro, HB 2889 clarifies how state estimated housing needs for localities in our region will work with Metro's Urban Growth Management processes and population forecasts.
- **SB 1530 (2024)** allocated nearly $100 million for local infrastructure projects to boost housing production. Included $65 million investments into stabilizing Oregon's shelter system.
- **SB 1527 (2024)** makes two prominent modifications to the first-time home buyer savings accounts. First, the measure allows funds to be withdrawn from accounts for use by a designated qualified beneficiary. This modification allows taxpayers to utilize the tax subtraction while saving for a first-time home purchase of a designated beneficiary rather than only for their own qualified home purchase. Second, the measure removes requirement of financial institutions to designate accounts as first-time home buyer savings accounts and instead requires the taxpayer to designate the account.
- **SB 1529 (2024)** authorizes the Oregon Health Authority to distribute air conditioners and air filters to entities that then provide them to eligible individuals during an emergency, and requires reimbursement of costs associated with identifying eligible recipients and product delivery and installation.
- **HB 4063 (2024)** required Multnomah, Clackamas and Washington counties to complete housing capacity analyses and housing production strategies like their city counter parts.
- **HB 3644 (2025)** It establishes a statewide shelter program at Oregon Housing and Community Services (OHCS) that sunsets at the beginning of 2034. The OHCS agency budget bill, HB 5011, allocates $204.9 million in total funding for shelter operations through 2033.
- **SB 599 (2025)** It prohibits rental housing discrimination based on immigration or citizenship status.
- **HB 3589 (2025)** It directs OHCS to develop a senior housing initiative to mitigate homelessness in Oregon's growing senior population.
- **HB 3031 (2025)** It creates the Housing Infrastructure Fund and program. The Christmas Tree bill, HB5006, allocated $10M for program administration and implementation.
- **SB 829 (2025)** It provides subsidies to cover insurance premiums for eligible affordable housing entities. It also conducts a cost study on liability coverage and insurance

premiums. The legislature allocated $2.5M for subsidies, the cost study, and program management.

- **SB 32 (2025)** Improves OHCS preservation tracking and reporting.

OTHER INTERESTED PARTIES:
State partners such as the Governor's office, Oregon Housing and Community Services, and Department of Land Conservation and Development are leading proposals on housing production. Oregon Housing Alliance and its member organizations, local governments, the Oregon Home Builders Association, Oregon Association of Realtors, Multifamily NW, and other industry groups also have a vested interest.

IMPACT IF PROPOSED ACTION OCCURS:

- Strategic reduction of services to minimize impacts
- Reduce racial disparities in housing.
- Facilitate more housing production.

RACIAL IMPACTS
Both nationally and in our region, rents are rising faster than incomes, increasingly limiting lower-income households – disproportionately people of color – to housing options in areas with lower access to opportunities and higher concentrations of poverty. Even households with moderate incomes are finding themselves priced out of neighborhoods where they work or go to school. Housing affordability and choice are not only issues of social equity; lack of equitable housing also threatens our economic competitiveness and the livability our region has worked hard to protect. Rapidly rising housing costs in much of Portland and areas in other parts of the region have resulted in displacement of low-income households to areas of increasing poverty farther from job centers and less well served by infrastructure, services, and amenities. Because they have lower average incomes, communities of color are disproportionately impacted by these trends.

Budget cuts to certain programs may have disparate racial impacts if the program prioritized services for people of color.

CLIMATE IMPACTS
Housing is a complex issue at the intersection of public health, racial equity and climate justice. Like the production of many items, new housing development can increase carbon emissions and impacts to the environment. However, housing is a necessity, and therefore, when implementing and supporting housing policies, we must look for greener solutions to mitigate its impacts to the environment. Ensuring that affordable housing funders, jurisdictions, and developers are aligned in supporting climate-smart approaches to creating and maintaining housing is critical to advancing our climate goals. Examples of this include passive design strategies to reduce the need for heating and cooling, green building standards and other environmentally focused strategies to housing production. In addition, we know that climate impacts such as extreme heat and cold pose a particular threat to our houseless, low income

and medically fragile community members. It is crucial to center them and their experiences in the strategies to address climate change in housing supply and production. Moving forward, Metro will look to understand emerging best practices to multi-family design and climate resilience strategies that balance considerations related to health/safety, livability, sustainability, durability and cost.

METRO 2026 LEGISLATIVE ISSUE IDENTIFICATION

Person completing form/Department: Kyung Park, GAPD
Date: November 13, 2025

ISSUE: Serial communications

BACKGROUND:
Oregon's Public Meetings Law requires governing bodies to deliberate and decide matters in open public meetings. A quorum is prohibited from discussing or deciding on official matters outside of a public meeting. This includes using private communications such as notes, emails, texts, in-person conversations, or an intermediary among a quorum of its members.

In 2021, a lawsuit alleged that school board members engaged in prohibited serial communications. In response, the legislature passed HB 2805 in 2023 to modernize serial communications and gave the Oregon Government Ethics Commission (OGEC) authority to enforce the entirety of the Public Meetings Law.

In 2024, OGEC adopted administrative rules which led to a misalignment between the interpretation of the law and the legislative intent of HB 2805. This misalignment caused confusion for elected officials and hesitancy to communicate with each other. A bill to address this issue failed in 2025.

RECOMMENDATION:
Support changes to the public meetings law to clarify prohibited serial communications and serial meetings. Reduce confusion for elected officials regarding compliance while ensuring transparency in decision making by governing bodies.

LEGISLATIVE HISTORY:
In 2021, HB 2560 laid the groundwork for virtual public meetings in response to the COVID-19 pandemic. The law required mandatory remote access, remote testimony, and additional requirements to ensure that the public could participate in a virtual environment.

In the 2023 legislative session, HB 2805 expanded the authority of the Oregon Government Ethics Commission to encompass all aspects of the state's Public Meetings Law. Previously, the OGEC only had jurisdiction over executive sessions. Additionally, the law broadened the definition of convening to include serial electronic communications.

After passage of HB 2805, alleged violations of serial communications and meetings were addressed by OGEC through a formal complaint process further shaping the definition of serial communications and meetings. However, a few decisions by the commission and statements made at mandatory training sessions caused confusion for elected officials.

OTHER INTERESTED PARTIES:
Key parties with a high level of interest include local governments both individually and through the League of Oregon Cities (LOC) and the Association of Oregon Counties (AOC); Society of Professional Journalists, Metropolitan Mayors Consortium, school boards, and other special districts.

IMPACT IF PROPOSED ACTION OCCURS:
- Operational clarity for Councilors and Council Office regarding compliance with Public Meetings Laws.

RACIAL EQUITY IMPACTS
None

CLIMATE IMPACTS
None

METRO 2026 LEGISLATIVE ISSUE IDENTIFICATION

Person completing form/Department: Kyung Park, GAPD
Date: November 13, 2025

ISSUE: Food and beverage as official compensation

BACKGROUND:
In September of 2024, the City of Beaverton requested advice from the Oregon Government Ethics Commission (OGEC) regarding food and beverage being served at an upcoming team building event. The Mayor sought guidance on whether city officials and their families can accept food and beverage served at the event sponsored by the City.

The guidance issued by OGEC determined that employees and public officials can accept the food and beverage at city sponsored events if the food and beverage was part of their official compensation package. The City needed to adopt policy to reflect food and beverage as part of the total compensation package before employees and public officials can accept food and beverage provided by the City.

In May of 2025, the League of Oregon Cities requested clarifying advice for a handful of similar scenarios such as potlucks and meals provided during meetings. OGEC issued advice that government-provided food and beverage is compensation and not a gift.

This recent determination created complications for agencies, boards, and commissions where members are not allowed by charter to accept any form of compensation. When these charters were adopted, food and beverage were not considered a form of compensation but instead courtesy for meetings held during regular mealtimes. This impacts Metro directly. For example, Metro's Future Vision Commission members are not allowed to accept any form of compensation, but meetings can occur during regular mealtimes.

RECOMMENDATION:
Support exceptions to requirements that food and beverage offerings be formally included as part of official compensation packages. The current requirements prohibit members of some advisory committees and commissions from accepting food and beverages during meetings that can sometimes occur during regular mealtimes. Support legislation that allows reasonable food and beverage offerings by the public body during these meetings or other official events.

LEGISLATIVE HISTORY:
Oregon's government ethics law was established by a statewide ballot measure in 1974 in response to the Watergate scandal and public calls for greater government accountability. Approved by more than 70% of voters, this measure created the independent Oregon Government Ethics Commission and established the initial set of laws (ORS Chapter 244). The

intent of ORS Chapter 244 has consistently been to prevent public officials from using their position for personal financial gain.

Two bills, HB 2595 in 2007 and SB 30 in 2009, made significant revisions to Oregon's government ethics laws including an expansion of prohibitions on using public offices for financial gain. Since then, the core statute remained intact with some minor administrative changes. Current interpretations of the law have been shaped by court decisions and advice given by OGEC.

OGEC analyzed sections of ORS Chapter 244, specifically gift laws and prohibited uses of office laws, when it determined that food and beverage provided by a public body must be part of a compensation package.

OTHER INTERESTED PARTIES:
Key parties with a high level of interest include local governments both individually and through the League of Oregon Cities (LOC) and the Association of Oregon Counties (AOC); community colleges, school boards, and other special districts.

IMPACT IF PROPOSED ACTION OCCURS:
- Metro may provide food and beverages at meetings and gatherings to all attendees including committee and commission meetings where charters prohibit members from receiving compensation.
- Reduction in administrative burden for public officials and agencies.

RACIAL EQUITY IMPACTS
None

CLIMATE IMPACTS
None

Materials following this page were distributed at the meeting.

December 2, 2025

Accelerating Housing Production Across the Region



Issue Statement

- In 2024, the Governor of the State of Oregon declared a housing and homelessness crisis and set a goal of 30,000 new housing units to be produced within the State by 2035.
- This calls for Metro to deploy all available tools to accelerate housing production to help address the housing crisis.
- In the Regional Housing Coordination Strategy (RHCS) Metro identified priority actions that align with work funded by Metro's Construction Excise Tax (CET). These specific actions would make up a proposed Housing Production Accelerator Fund (HPAF).

Potential Actions

1. $5M investment of CET reserves to accelerate housing production
2. 2040 grant program adjustments
3. Limited duration waiver of CET for housing production in jurisdictions that simultaneously waive system development charges (SDCs)

Construction Excise Tax (CET) History

- Enacted in 2006 by Metro Council
- Generates revenue for planning work by local governments in areas where the Urban Growth Boundary has been expanded
- In 2007, the State Legislature prohibited local governments from adopting new CETs (Metro was grandfathered in)
- Provides critical funding for Metro's 2040 Planning and Development and Community Placemaking grants

CET Rate and Exemptions

Tax Rate 0.12% (.0012)

- Applied to new construction or major renovations $100K or more
- Maximum tax liability $12K
- Any project over $10M would have a tax liability of $12K

Exempt from Tax

- Construction valued at less than $100K
- Affordable housing (60% AMI)
- Any tax-exempt organization

1. Housing Production Accelerator Fund

- Housing pre-development and technical assistance
- Expand the brownfield grant program
- Support local Housing Production Strategy (HPS) implementation
- Technical assistance to support planning and implementation of housing production, affordability and choice
- Explore regional land bank strategies

Learn more at **oregonmetro.gov**

2. 2040 Grant Program Adjustments

- Rename the 2040 Planning and Development Grant program
- Tighten focus on accelerating development across the region



3. Temporary CET Waiver for housing

- Market signal to developers
- Small fee, low benefit to developers
- Adds complexity and requires local jurisdictions to implement waiver



Budget / Staffing

- Requires dedicated staff to implement grants and technical assistance
- Work with the COO to amend CET Administrative Rules
- Identify any needed Metro Code changes (not expected)



Policy Questions:

1. Does the Metro Council support allocating $5M from the Construction Excise Tax fund balance to create a Housing Production Accelerator Fund (HPAF)?
2. Would the Metro Council like to direct a refocus and renaming of the 2040 Planning and Development Grants to support development readiness?
3. Would the Metro Council like to implement a limited duration waiver of the CET for housing projects in jurisdictions that have implemented a waiver of SDCs for housing?

Next steps

- Resolution to implement council direction
- Work with COO to create the HPAF, including staffing and implementation plan
- Review administrative rules and propose any required changes

Thank you!

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December 2, 2025

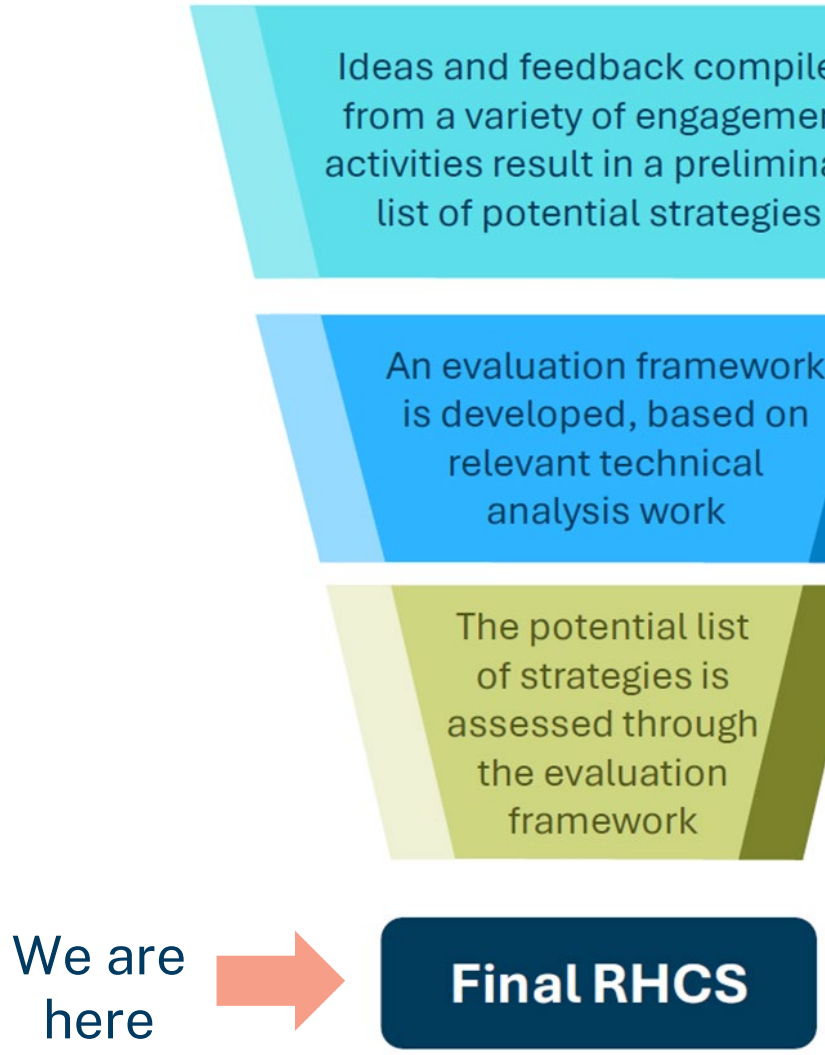
Metro’s state-mandated Regional Housing Coordination Strategy (RHCS)

Reminder – what is the RHCS?

- Required by the State as a part of the Oregon Housing Needs Analysis (OHNA) framework
- List of actions Metro will take to **promote housing production, affordability and choice**
  - Coordinate with local production strategies
  - Fill regional gaps (resources, capacity, tools)

Where are we?

- ✓ Scope development
- ✓ Technical analysis
- ✓ Ongoing engagement
- ✓ Strategy evaluation
- • **Adoption**



Public comment period

- Review by the Implementers Work Group
- Survey responses and written testimony
- Presentations to MTAC, MPAC, WCCC, C4
- Meeting with County SHS leadership
- Preliminary review with DLCD

Key feedback

- Add **more detail** to each action
- **Clarify and justify Metro's role** in each action - avoid duplication of efforts or unnecessary administrative burden
- Re-evaluate implementation timelines to be **ambitious, yet realistic**
- Focus on actions with **highest impact and direct outcomes** first
- Mixed feedback about including actions that don't directly impact production, but have significant **impact on affordability and choice**
- Keep **collaborating** with key partners through implementation

Changes to the action list

- Details added about critical steps to complete actions and how Metro will coordinate with jurisdictional partners
- Timelines for implementation and completion reviewed
- Some actions broadened
- Some actions narrowed

MPAC recommendation

Vote to recommend the RHCS **passed** with these amendments from MTAC's recommendation:

- Delete "changes to policies such as rental assistance payment standards" from the description of Action #9
- Delete references to "housing choice vouchers" in the description of Action #10

Next steps

- Vote on a Resolution to approve the RHCS (December 18)
- Submit the RHCS to DLCD for a public comment review and approval process
- Develop work plans and incorporate actions in department budgets
- Leverage existing committees, work groups and applicable decision-making structures to ensure collaboration throughout implementation



Metro

Arts and events
Garbage and recycling
Housing and supportive services
Land and transportation
Parks and nature
Oregon Zoo

oregonmetro.gov



Proposed actions

Accelerate housing production

1. Housing pre-development and technical assistance
2. Expand funding for the brownfield grant program
3. Local Housing Production Strategy (HPS) implementation funding and support
4. Regional pool of housing professionals for technical assistance and staffing support

Proposed actions

Research and assessment

5. Equitable access to regulated affordable housing
6. Community co-design
7. Innovative approaches
8. Middle housing assessment

Proposed actions

Convene and coordinate

9. Affordable housing operational stabilization strategy
10. Improvements to voucher and other rental assistance policies and implementation

Proposed actions

New tools

11. Regional affordable housing inventory and listing service
12. Regional land bank plan
13. Permitting dashboard

Proposed actions

Policy

14. Urban Growth Management Functional Plan housing audit

Funding and cross-sector collaboration

15. Coordinated legislative agenda
16. Affordable housing funding feasibility

Metro Council State Legislative Agenda Setting

Kyung Park, State Affairs Advisor

Anneliese Koehler, Legislative Affairs Manager

December 2, 2025

Setting the Stage: Short Session



- Tweaks, minor policy changes, passing unfinished business
- Limited number of bills for legislators
- Budget, budget, budget

Setting the Stage: Oregon Legislature

- Democrats have supermajorities in both chambers
- Additional Democrat in the House
- New House and Senate minority party leadership
- Strong Portland metro area representation in Senate and House leadership



New Metro-area Legislative Members



Rep Matt Bunch, HD 51



Rep Lamar Wise, HD 48



Sen Christine Drazan, SD 26

IP 302

- Refers gas tax, vehicle registration, title fees and payroll tax increases
- Does NOT refer road user charge for electric and hybrid vehicles and ODOT accountability provisions
- Signature gathering threshold: 78,116

<u>Referral timeline</u>

Approved for circulation: November 13, 2025

Signature gathering deadline: Dec. 30, 2025

Referral election: Nov. 3, 2026

November Revenue Forecast

- Deficit closed to $63 million from $373 million
- Unexpected one- time increase in corporate tax receipts
- Slow down in economic conditions
- Agency presentations on budget reductions

What's the Metro Council Legislative Agenda?

Legislative Principles

- Division into two sections: general or over-arching principles and issue-specific principles
- Meant to be evergreen guiding principles for legislative affairs staff to rely on for bills not specifically identified in priorities

Legislative Priorities

- Meant to be session specific around bill concepts that legislative affairs staff anticipate coming.



Serial Communications

Support changes to the public meetings law to clarify prohibited serial communications and serial meetings. Reduce confusion for elected officials regarding compliance while ensuring transparency in decision making by governing bodies.



Food and Beverage

Support exceptions to requirements that food and beverage offerings be formally included as part of official compensation packages. Support legislation that allows reasonable food and beverage offerings by the public body during these meetings and other official events.



Protecting Critical Services

To ensure a prosperous economy, a clean and healthy environment, and a high quality of life for all their constituents, the state, Metro, and the region's counties, cities, and other service providers must have the financial resources to provide sustainable, quality public services. Accordingly, when dealing with financially constrained budgets, the Legislature should avoid cutting critical services.



Housing and Homelessness Response Stability

Support legislation that protects the stability of regional and local housing and homelessness systems. Support efforts that offer permanent, affordable housing for individuals and families experiencing or at risk of homelessness and provide supportive services and community-based support people need to keep their housing. Additionally, support ways to stabilize and preserve the affordable housing stock.



Transportation Package

Support efforts that build on the 2025 Transportation Funding Bill, lay the groundwork for a 2027 transportation package, and advance the 2025 JPACT priorities: addressing short-term funding solutions, long-term sustainable funding, finishing what we started, safe urban arterials and streets, transit investments, and resiliency.



Speculative Ticketing

Support legislation that bans speculative ticketing, protecting consumers and artists from deceptive ticketing practices.



SAVE THE DATE: LEGISLATIVE BREAKFAST

Coming January 22nd
at the Oregon Zoo



Thank you!

oregonmetro.gov

