

# Barriers to Housing Production in Oregon: Technical Report

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October 2022

Technical Report

**Prepared for:**

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# Acknowledgements

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The Institute for Policy Research and Engagement wishes to thank the following individuals for their assistance with this project: DLCD staff, including our project leads Sean Edging and Ethan Stuckmayer; Lorelei Juntunen and Madeline Baron – ECONorthwest; Bill Van Vliet – Network for Oregon Affordable Housing; Samantha Bayer – Oregon Homebuilders Association; Kevin Toon – League of Oregon Cities; Gina Firman Nichol – Association of Oregon Counties; Al Johnson – land use attorney (retired).

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## About the Institute for Policy Research and Engagement



**School of Planning, Public  
Policy and Management  
Institute for Policy  
Research and Engagement**

The Institute for Policy Research & Engagement (IPRE) is a research center affiliated with the School of Planning, Public Policy, and Management at the University of Oregon. It is an interdisciplinary organization that assists Oregon communities by providing planning and technical assistance to help solve local issues and improve the quality of life for Oregon residents. The role of IPRE is to link the skills, expertise, and innovation of higher education with the transportation, economic development, and environmental needs of communities and regions in the State of Oregon, thereby providing service to Oregon and learning opportunities to the students involved.

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# Section A: Introduction

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This technical report provides the detailed research and analysis that supports the accompanying summary report titled “Barriers to Housing Production in Oregon.” The summary report includes our key findings, conclusions, and recommendations. This technical report provides detail on the research the IPRE team conducted to support the summary report.

## Background

This report summarizes research conducted by faculty from the Institute for Policy Research & Engagement (IPRE) on barriers to housing construction in Oregon. The research team conducted a literature review, reviewed municipal housing-related documents and plans, and conducted a survey of local government staff, private sector housing developers and nonprofit housing developers. This technical report complements a summary report.

The IPRE research team used several methods which will be described in subsequent chapters:

- **Literature Review.** IPRE started by collecting and reviewing a broad range of housing literature: industry reports, white papers, journal articles, etc., to identify key barriers and impediments to housing production in the U.S.
- **Review State Land Use Policy.** The research team reviewed existing land use regulatory context for housing for cities in Oregon. This included key statutes (ORS 197, etc.), Statewide Planning Goal 10 (Housing) and the rules that implement Goal 10 (OAR 660-007 and OAR 660-008).
- **Summarize Previous IPRE and DLCDC Survey Findings.** The research team reviewed previous surveys conducted by IPRE (HB 4079 and the 2017 Housing Affordability survey) and analyzed data from DLCDC’s HB 4006 city surveys.
- **Examine Recent Housing Needs Analyses and Consolidated Plans.** The research team reviewed about 20 recent Housing Needs Analyses (HNAs) to understand documented barriers to multifamily housing (beyond land need) in cities lacking land to accommodate housing. We also reviewed several Housing Production Strategies (HPS) and Consolidated Plans HUD requires of Metropolitan Planning Organizations.
- **Online Multistakeholder Survey.** The research team developed and administered an online survey to planners, housing developers (both for-profit and nonprofit), and related organizations. The survey used a targeted sampling methodology targeting individuals knowledgeable about housing issues in Oregon. We received about 260 responses to the survey.

These methods provide a rounded approach to understanding barriers to housing production by relying on peer-reviewed research, applied research, plans, and input from a broad range of housing experts. In summary, the intent was to develop a comprehensive understanding of factors that are hampering housing production in Oregon.

## Conceptual Framework

Based on the conceptual framework described in **Summary Report Chapter 2** and duplicated here for readability, we structured our research around five categories of barriers listed at the end of this section.

Terry Moore, a founder and Vice-President of the Portland-based consulting firm, ECONorthwest, developed a conceptual model of factors that affect price of housing in the early 2000s (see Exhibit 3). Moore developed the framework as part of multiple HNAs the firm had worked on in that era. Part of the intent was to put the Goal 10 requirements in context and to help local planners and elected officials understand factors that local policy could affect.

As we considered analyzing barriers to housing production, we explored various conceptual frameworks in the literature on housing price. Our intent was to cast a wide net to consider various supply and demand factors that affect housing price and production. We settled on using Moore's framework as a taxonomy to examine barriers to housing construction. We distilled Moore's schematic of U.S. housing markets to classify barriers into five types.

Exhibit 3 identifies land as a key input to the housing production process. While Goal 10 and the administrative rules that implement Goal 10 (OAR 660-007 and OAR 660-008) are primarily concerned with long-term land supply (20 years), developers are primarily concerned about the supply of land that is available for housing development in the present. OAR 660-008-0005(2) defines *buildable land* as residentially designated land within the urban growth boundary, including both vacant and developed land likely to be redeveloped, that is suitable, available, and necessary for residential uses. This definition has several important elements:

1. Inside the urban growth boundary. A core objective of the statewide land use system is to accommodate most new housing development within UGBs.
2. Suitable. OAR 660-008-0005(2) states "Land is generally considered "suitable and available" unless it:
  - a. is severely constrained by natural hazards as determined under Statewide Planning Goal 7;
  - b. Is subject to natural resource protection measures determined under Statewide Planning Goals 5, 6, 15, 16, 17 or 18;
  - c. Has slopes of 25 percent or greater;
  - d. Is within the 100-year flood plain; or
  - e. Cannot be provided with public facilities.

Thus, suitability is primarily a function of (1) state policies, or (2) physical attributes of the land. The rule implicitly considers land designated for residential uses in UGBs available if it meets the criteria listed above.

3. Available. A standard definition of available is, "Present and ready for use; at hand; accessible." In our view availability in the context of land supply should include that the land is for sale or otherwise can be acquired by a developer or builder. State policies do not consider land availability in this context.
4. Necessary. This is a need-based threshold and is addressed in the "Housing Needs Projection," which is "a local determination, justified in the plan, of the mix of housing types, amounts and

densities” (OAR 660-008-0005(6)). Housing need is also addressed in OAR 660-024 (Urbanization).

The statewide land use program leaves residential land readiness largely up to municipalities. In research IPRE conducted for Business Oregon on industrial land readiness, we identified three perspectives that require planning at different time frames:

- **Long-Range Planning.** The Oregon land use system requires municipalities provide a 20-year supply of buildable land. In short, this is the city and DLCDC perspective.
- **Site Readiness.** This can be thought of as the process of preparing land for development—extending backbone infrastructure and planning for key public services. This is primarily achieved through Goal 11 (Public Services) and Goal 12 (Transportation), other functional plans (water, wastewater, parks, schools, etc.), and capital improvement plans.
- **Site Development.** This represents the perspectives of developers or any entity representing a business that wants land for immediate development.

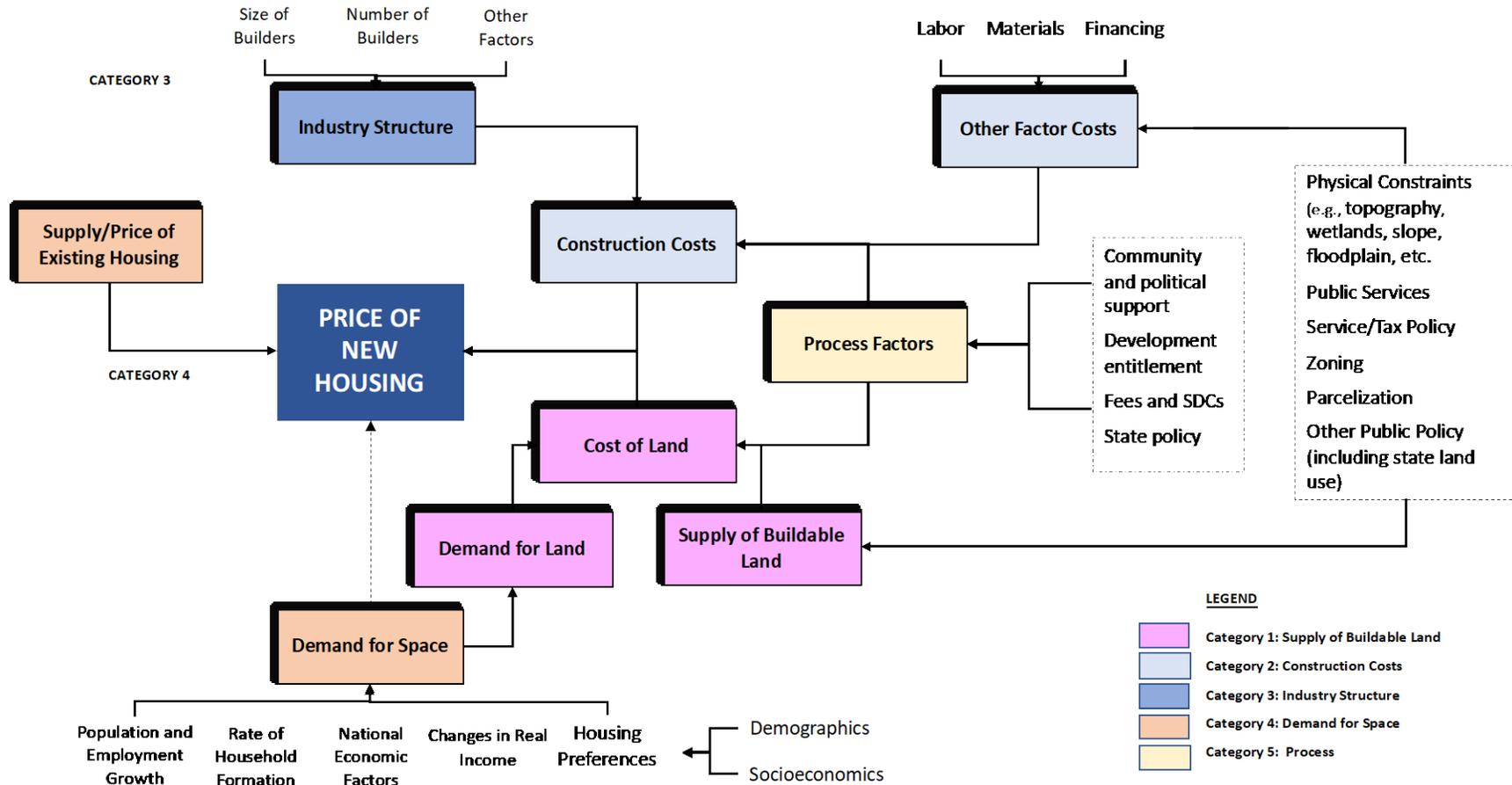
The issue of timeframes is addressed in the research literature. In a 2001 book titled “Land Market Monitoring for Smart Urban Growth,” the authors present a conceptual framework for land development that links land states to activities (called transition events) that lead from greenfields to developable lots. Exhibit 4 shows the framework with annotations we added to link the framework to activities of state and local agencies in Oregon.

The framework starts with farmland (or any large parcel). In Oregon, this land would typically be outside the UGB or in an urban reserve. The policy action is then to amend a UGB placing land in what DLCDC calls an “urbanizable” state.<sup>1</sup> A next step could be annexation. Once annexed the city provides major backbone infrastructure (e.g., water and sewer mains, arterial access, etc.) up to the site. Depending on the site size, it might be subdivided and developed in pieces or developed as one large employment use. Most Oregon cities require developers provide onsite infrastructure improvements.

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<sup>1</sup> We note that residential development can also occur on lands granted exceptions to Goal 3 or 4 and zoned for rural residential uses.

# Exhibit 1. Factors Affecting Housing Price



Source: IPRE; Adapted from Terry Moore of ECONorthwest

## Comprehensive list of barriers

### Land/Land Regulation (Category 1)

- Lack of available vacant buildable lots (e.g., for sale or owned by builders)
- Lack of larger (5+ acre) development ready tracts
- Inability to bring land to a development ready state (e.g., bringing tract land to serviced lots ready for development)
- High cost of land
- Physically constrained lands (e.g., wetlands, steep slopes)
- Wetland requirements
- Other environmental review (e.g., riparian areas)
- Not enough land zoned for single-unit housing
- Not enough land zoned for multi-unit housing
- Other zoning restrictions (e.g., lot size, minimum density requirements)
- Parking Requirements
- State Building Code Requirements
- Right of Way dedication and frontage improvement requirements
- Other public facility requirements (e.g., stormwater mitigation)
- Other requirements associated with bringing land to a development-ready state (e.g., subdivision conditions of approval)

### Infrastructure (Category 1)

- City System Development Charges (SDCs)
- Other SDCs (e.g., Special Districts)
- Funding to finance infrastructure improvements
- Prioritizing projects Capital Improvement Plans
- Coordination with state agencies on infrastructure development
- Regulations governing infrastructure development
- Transportation system-related improvements (e.g., intersection/collector/arterial improvements)

### Cost and Financing (Category 2)

- High construction Costs (materials)
- High construction Costs (labor)
- Lack of financing for land development (e.g., subdivision improvements)
- Lack of financing for housing construction
- Lack of financing for single-unit housing
- Lack of financing for multi-unit housing
- Lack of financing for manufactured housing
- Lack of financing for missing middle housing

### Industry Factors (Category 3)

- Developers are not building enough housing that is needed and affordable
- Developers are not building the types of housing needed for different household compositions and incomes
- Not enough housing developers

- Not enough housing developers building at a small scale
- Not enough housing developers building at a large scale (10 or more units per development)
- Not enough housing developers focused on infill development
- Not enough housing developers focused on greenfield development
- High cost/limited supply of construction workers, generally
- High cost/limited supply of skilled labor (e.g., licensed tradespersons)
- Insufficient workers in skilled trades
- Not enough workers for other jobs
- Lack of quality developers/builders
- Lack of contractor capacity

#### Housing Demand Factors (Category 4)

- Lack of market demand for single-unit housing
- Lack of market demand for multi-unit housing
- Lack of market demand for manufactured housing
- Community experiencing population loss
- Development not keeping pace with population growth
- Demand for second homes
- Demand for short-term rentals
- Limited ability for low and moderate income to compete in the market
- Demand from high income households

#### Process and Permitting (category 5)

- Lack of political will from elected officials
- Opposition from neighbors
- Length of time it takes to process land use entitlements
- Length of time to process building permits
- Permit fees
- Permit requirements
- Cost of SDCs
- Public hearings in the land use process
- General uncertainty in the land use entitlement process
- Impact of building codes on use of innovative construction techniques (e.g., 3D printed units, modular units, cross-laminated timber or mass timber)

#### Government assisted housing (nonprofits only)

- Amount of grant funding available for projects
- Timing of grant funding for projects
- Process of applying for grant funding
- Assembling capital stacks for projects
- Complexity of applying for grant funding
- Cost of applying for grant funding
- Limited opportunities to apply for grant funding
- Time elapsed from applying for grant funding and receiving funding
- Interest rates

- Inflation
- Construction standards for government-assisted housing
- Cost of Labor

# Section B: Literature Review

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## Background and Methods

In this study, we sought academic, industry, and government research on barriers to housing production. We focused our literature search on barriers to housing production and targeted our search to the five broad categories in the Conceptual Framework (in the summary report). We did not focus on how specific policies affect the price of housing but focused more directly on barriers to producing housing.

We searched a variety of databases for academic journals, industry analysis articles, and both nonprofit and think tank reports. These databases included Google Scholar, Academic Search, JSTOR, and ProQuest to name a few. Using previous reports as a starting point, we created a variety of keywords and phrases that encompassed the majority of barriers facing housing production (based on the conceptual framework). We also used broad phrases about housing to ensure that all variables mentioned would be included and not just variables from previous reports. These included but are not limited to “barriers to housing production”, “NIMBY”, “zoning and housing production”, “infrastructure in housing production”, “lack of housing”, “lack of affordable housing”, “housing production in Oregon”, etc. We pulled relevant articles and compiled them in a database. With two researchers compiling this data, we came across many overlapping articles which raised our confidence that the most relevant articles in the field were being analyzed. After our search, we created a database that summarized the type/author, affordable vs. market, the size and characteristics of the case cities, and the relevant barriers. We provided an Excel spreadsheet of our literature data to DLCD. We provide cross tabs describing our literature search across these dimensions by category.

Rather than creating a comprehensive annotated bibliography, we summarized articles related to the most prevalent barriers discussed in the literature and offered a summary of policy solutions discussed by the authors.

The production of ample housing is often delayed, obstructed, or blocked entirely by a multitude of factors that impede policy makers, developers, and future residents. We sought to understand the various barriers and examined categories relevant in the literature that account for these barriers and to determine which factors might be the most prevalent and most harmful to production. What we found is that housing in the United States is a devolved process; while housing policy is adopted at the state and federal levels, the implementation of regulations and production of housing itself is the responsibility of local government and private sector. Because of this, most barriers to production arise from local regulation, neighbor opposition, political will of local elected officials, and regulatory costs of development. While we looked at five different categories of barriers (1-Supply of Buildable Land; 2-Factor Costs; 3- Industry Structure; 4- Demand Side; 5-Process), we focus here on the most prevalent and most frequent barriers in the literature.

We first summarize the literature across the five categories:

## Land Use Restrictions and Zoning (Category 1)

Land use regulation (Category 1) is often cited as a major barrier to the production of sufficient housing. The most common type of this regulation is zoning policy which fluctuates across cities and determines height, setback, and density of housing among other features. Land use restrictions and regulations represent some of the greater physical constraint barriers to housing production (Gilroy, 2006; J. Schuetz, 2019; Shoag, 2019; Squires & Hutchison, 2021). Zoning regulation, specifically, can change what buildable land looks like by mandating single-family zoning, which decreases density and increases sprawl, reducing the number of homes that can be built on any given parcel of land as well as requiring set-backs, height restrictions, and parking requirements. These requirements most often impact multifamily housing and smaller units. While there is a positive relationship between economic shocks and increases in multifamily housing production, these types of requirements reduce this effect and cut off further migration (Hilber, 2011).

Land use regulation, like growth boundaries, can also reduce the supply of buildable land. In areas that are constrained by natural geographical barriers such as oceans, lakes, or inclines, there tends to be higher levels of regulation which act as an additional barrier to production (Saiz, 2010). These geographical barriers can also reduce available built infrastructure which results in vacancies instead of expanding restricted services (*Land Supply Constraints in the United States*, n.d.). In many of these cases however, zoning and other land use regulations are sporadically enforced by weak mechanisms which creates inequities in the types of housing produced. Additionally, these overly restrictive land use regulations like zoning constraints and building requirements tend to raise home prices (Choppin, 1993; E. L. Glaeser et al., 2005; Gyourko & Krimmel, 2021; Landis, 1986; Michael D. Tanner, 2018; H. H. and J. Schuetz, 2020; J. Schuetz, 2019, 2020; Tregoning, 2005). Constraints that builders face get passed down to the homebuyer in the form of higher rents and home prices. However, some argue that while overly restrictive zoning slows development, it has little or no effect on price because instead local regulation is symbolic and weakly enforced (Dehring, 2006; Gyourko, 2009; Quigley & Rosenthal, 2005). While regulation can be inconsistently enforced which contributes to a lack of cooperation and confusion surrounding the development process, land use constraints have shown to both slow the development process and at times pass costs along to homebuyers and renters. This suggests that reduced regulation at the local level and increased state and federal intervention through incentives could increase housing production (E. Glaeser & Gyourko, 2018; Lutz, 2015; Tregoning, 2005).

## Taxes and Construction Costs (Category 5 and Category 2)

Land use constraints in the form of regulation often includes regulatory costs which also function as a major barrier to production by disincentivizing developers to build (Beitel, 2007; Brannon, 2020; Dehring, 2006; Huffman et al., 1988; Somerville, 1999; Thompson, 2019). These costs can include land taxes, delays and multiple reviews in the permitting process which compound cost over time. In addition to regulatory costs, developers also face increased costs of construction, labor, and materials; like regulatory costs, these costs can be passed on to renters or homebuyers, or can limit construction entirely (Adabre et al., 2020; Colton & Ahluwalia, 2019; Farris, 2001; Fiscelli, 2003; E. Glaeser & Gyourko, 2018; Hoyt et al., 2011; Huffman et al., 1988; H. H. and J. Schuetz, 2020; Somerville, 1999). Additionally, since construction has been so constrained, it has failed to solve the shortage of housing at different rates, solutions have included shifting taxes away from developers, mandating localities to ease regulation and expand transportation, tax incentives, expanding adaptive reuse projects, and reduced parking and building codes (Shoag, 2019; Squires & Hutchison, 2021; Walk-Morris, 2021).

Construction is also constrained by forward-looking behavior. While construction is highest when prices for homes and their inputs are lowest, as prices increase, developers balance the trade-off of constructing or waiting for even higher prices or lower interest rates and inflation in the future. This supply elasticity often results in phased development to decrease developer cost (Blackley, 1999; Murphy, 2018; Ott et al., 2012). Taxes and construction costs are cited as the most frequent obstacles to production; however, it is argued that homeowners also constrain development by acting like monopolists to keep out competition, thereby reducing construction as much as possible to maximize home values (E. L. Glaeser et al., 2006).

## Political Will and Neighborhood Opposition (Category 5)

While both construction costs and zoning represent major barriers to production, some scholars attribute these barriers to the Not In My Backyard (NIMBY) movement (Adabre et al., 2020; Beitel, 2007; Colton & Ahluwalia, 2019; Farris, 2001; E. L. Glaeser et al., 2005). In fact, responding to the 1991 HUD report on housing barriers, scholars note that most barriers in housing production are NIMBY motivated (Downs & Godschalk, 1992; Schill, 1991). These barriers often take the shape of zoning regulations that passed by local governments that are dominated by homeowner interests (Downs & Godschalk, 1992; Elmendorf, 2019; Mandelker, 2016; Scally, 2013; Schill, 1991). Local areas controlled by homeowners have incentives to keep housing prices high which result in cities passing sometimes contradictory policies in order to maximize revenues while minimizing costs, this paired with hostile regulation directly decreases housing development (Metcalf, 2018; Wassmer, 2021). Hostile regulation can also be racially motivated, as whiter neighborhoods are less likely to produce subsidized housing (Bullard, 1990; Goetz & Wang, 2020).

Similar to the literature on zoning restrictions, most restrictive land use policies appear to be the result of NIMBY imposition on local government and the failure of local government to produce sufficient and diverse housing. Most progress at local levels to increase housing production has been significantly limited and when it does occur, it is often the result of state law rather than local political will (Dawkins, 2000; Gabbe, 2019; Manville, 2021; May, 2005).

Scholars suggest incremental incentives to reduce NIMBYism as well as greater state and federal assistance through mandates, subsidies, and legislative reform (Downs & Godschalk, 1992; Elmendorf, 2019; Mandelker, 2016; Mangin, 2014; Scally, 2013; Schill, 1991).

Additionally, local government can reduce NIMBYism and increase political will by streamlining the permitting process, addressing the number of hearings and unclear standards, and increasing interagency coordination and consensus building (Casella & Meck, 2009; Jackson, 2018; May, 2005). Therefore, housing production remains a nuanced problem in the United States. Despite efforts to produce more housing, barriers exist in the form of local regulation, lack of buildable land, neighbor pushback, and high costs of production. Furthermore, these barriers to market rate housing production are exacerbated when different types of affordable, workforce, disability, and transition housing are developed.

## Summary

The variety of barriers present unique challenges to the production of housing. We grouped barriers into five categories (1-Supply of Buildable Land; 2- Factor Costs; 3-Industry Structure; 4- Demand Side; 5- Process) and found that each category contained a multitude of nuanced obstacles. These included restrictive zoning and land regulations, construction costs and land taxes, and neighborhood opposition as well as difficulties in the permit process and lack of political will. While this is not an exhaustive list of

reasons why housing is not produced at necessary rates, we believe these sources help explain many of the barriers that Oregon communities face when trying to provide housing.

**Exhibit B.1 Frequency of Themes by Category and Barrier**

Category 1: Supply of Buildable Land							
	Academic	Gov. research	Industry	Nonprofit	Research Network	Think Tank	Count
Zoning	10	1	1	2		6	18
Environmental Review	3			1		2	6
Growth caps	1	1				3	5
Impact fees	2					3	5
Infrastructure Costs	4					1	5
Land use restrictions			1	2		1	4
Cost of land	2					1	3
Parking Requirements	3						3
Taxes	2					1	3
Density restrictions	1					1	2
Building regulation	1						1
Development Standards	1						1
Infrastructure Requirements	1						1
Lack of Land		1					1
Large lot zoning		1					1
Local regulation	1						1
Regulatory Barriers (size restrictions)	1						1
Regulatory tax	1						1
State law impacting development	1						1
State law- Prop 13						1	1
State law-- CA SB50						1	1
State Laws- developer override zoning		1					1
State tax policy	1						1
Zoning (litigation)	1						1
Zoning (single family)				1			1
Zoning(density)					1		1
<b>Category 1 Total Count of Studies</b>	<b>37</b>	<b>5</b>	<b>2</b>	<b>6</b>	<b>1</b>	<b>21</b>	<b>72</b>

Category 2							
	Academic	Gov. research	Industry	Non-Profit	Research Network	ThinkTank	Count
Construction costs	5		1	1			7
Financing	1		2			2	5
Materials	1		1				2
Trade Barriers			2				2
Bankruptcy in Construction	1						1
Builder unionization	1						1
Construction Costs/Regulation	1						1
Construction Scale	1						1
Labor	1						1
PPP	1						1
Quality concerns	1						1
<b>Category 2 Total Count of Studies</b>	<b>14</b>		<b>6</b>	<b>1</b>		<b>2</b>	<b>23</b>
Category 3							
Developer costs		1		1			2
Concentration of builders				1			1
Developer Education						1	1
Developer inexperience	1						1
Number of Builders	1						1
Union						1	1
<b>Category 3 Total Count of Studies</b>	<b>2</b>	<b>1</b>		<b>2</b>		<b>2</b>	<b>7</b>
Category 4							
Number of Builders	1		1				2
Economic viability	1						1
Lack of Industry			1				1
Rising rents			1				1
Union fees						1	1
<b>Category 4 Total Count of Studies</b>	<b>2</b>		<b>3</b>			<b>1</b>	<b>6</b>

Category 5							
	Academic	Gov. research	Industry	Non-Profit	Research Network	ThinkTank	Count of Studies
NIMBY	5	1				4	10
Permit Process	3	1				1	5
Political will	4					1	4
Permit timeline						2	2
Community Attitude	1						1
Discouragement of construction		1					1
Negative Public Perception	1						1
Process-- wealth of elected officials	1						1
<b>Category 5 Total Count of Studies</b>	<b>15</b>	<b>3</b>				<b>8</b>	<b>26</b>

Exhibit B.2 Frequency of Themes by Category: Housing Type

Housing Type						
	Category 1	Category 2	Category 3	Category 3	Category 5	Count
Affordable	21	5	2	4	9	41
Affordable (Manufactured)	1					1
Affordable (Multi-family)	1					1
Both Affordable & Market	17	3	1		5	26
Market	14	8	1	2	6	31
Not specified	18	7	3		6	34
<b>Count of Studies</b>	<b>72</b>	<b>23</b>	<b>7</b>	<b>6</b>	<b>26</b>	<b>134</b>

Exhibit B.3 Frequency of Themes by Category: Community Type

Community Type						
	Category 1	Category 2	Category 3	Category 3	Category 5	Count
Urban	30	11	2	6	10	59
Rural	2				1	3
Suburbs	1					1
Not specified	39	12	5		15	71
<b>Count of Studies</b>	<b>72</b>	<b>23</b>	<b>7</b>	<b>6</b>	<b>26</b>	<b>134</b>



## Abbreviated Summary of Prevalent Barriers

### Exhibit B.4 Category 1: Zoning

Title	Author	Summary	Solution
Breaking the Exclusionary Land Use Regulation Barrier: Policies to Promote Affordable Housing in the Suburbs Note	T. Choppin	The government has not pursued the goal of providing equal housing for all income groups. This article explores HUD (1991) barriers including zoning as the most visible contributor to increased housing cost; design standards, required improvements, and impact fees and delays in the approval process. It also cites land and income discrimination and NIMBYism as barriers. The author notes that of these barriers, he believes zoning, subdivision regulation, and building codes are "significantly responsible for the present affordable housing crisis".	The solution is a tailored set of regulatory reforms that would allow the market to meet the needs of moderate income households which would satisfy a major segment of the overall housing market.
Do we know regulatory barriers when we see them? An exploration using zoning and development indicators	G. Knapp, S. Meck, T. Moore, R. Parker	Traditional barriers include: zoning, environmental review, impact fees, exactions and procedural requirements, but this article focuses specifically on zoning with a focus on zoning that imposes restrictions on type and density. This article looked at the 50 largest metro areas and their indicators of housing price, production and zoning constraints and then analyzed state, regional, and local regulatory environments. They find zoning as a barrier to high-density, multi-family housing.	The solution is supporting metropolitan planning organizations (MPOs) to collect and report information on land use regulation-- this is the first step without establishing an oversight committee.
Is zoning a useful tool or a regulatory barrier?	J. Schuetz	Research shows that overly restrictive zoning makes it hard for developers to build new housing, driving up rent and prices. How do we know if zoning is too restrictive though? Surveys and reading through zoning codes both present limitations, researchers should ask: if market is producing enough additional housing to meet demand, is the housing being built in the highest demand location, and does the market produce a diverse range of housing choice.	In theory, a development process that allows the general public to provide input and could potentially allow vulnerable communities to push back.
The Effects of Land Use Regulation on the Price of Housing: What Do We Know? What Can We Learn?	J. Quigley, L. Rosenthal	Restrictive zoning and growth controls tend to slow expansion and reduce net densities of housing stock, however a substantial number of land use and growth control studies show little or no effect on price, implying that sometimes, local regulation is symbolic, ineffectual or only weakly enforced. The authors determine this using a taxonomy of land use regulations: 1). limits on geographic preferences on density and intensity of developments; 2). design standards for lots and buildings; 3). cost shifting from locality to developers; 4). withdrawal of land from developable supplies; 5). direct and indirect controls on growth	A national regulation census that would measure at regular intervals municipal enactments and implementation patterns.
The Effect of Zoning on Housing Construction	J. Thorson	This research looked at a case study of agricultural downzoning in McHenry County, Illinois. What they found was that developers are able to anticipate zoning changes and may subdivide land or negotiate with the zoning board to make side payments or exactions. Therefore, this more restrictive zoning will reduce the number of building permits issues, reducing housing in the long run.	No solutions offered.
Ben Carson Takes on High Housing Costs	M. Tanner	Carson's most important initiative as Secretary of HUD is a "full frontal assault on zoning" and land use ordinances that deprive the poor of affordable housing. Instead of matching high housing costs with higher subsidies, Carson intended to link federal housing funds to local official's willingness to reduce regulations that restrict housing (political will).	Linking funds to political will to reduce zoning regulation

Title	Author	Summary	Solution
Overcoming Barriers to Placing Manufactured Housing in Metropolitan Communities	C. Dawkins; T. Koebel	This article examines barriers to manufactured housing construction in metropolitan areas and finds that a variety of restrictions including regulatory restrictions, zoning (lack of by right zoning, fire codes, zoning codes, subdivision regulations), permits, and architectural design standards impede the placement of this housing.	Suggest that planners emphasize manufactured housing as an affordable option through educational programs, encouraging public-private partnership, designing incentives, and modifying regulations.
YIMBY Comes to Washington	M. Tanner	Cato's project on Poverty and Inequality in California have concluded that exclusionary zoning and anti-housing regulations have driven up the cost of housing in California. Additionally, construction has been blocked by a range of local regulations.	The YIMBY Act would require communities that receive CDBG to report to HUD on actions they are taking to reduce exclusionary zoning and other barriers to housing.
States can improve housing well-being through thoughtfully designed policies	J. Schuetz	Rising housing costs have impacting beyond local politics. To encourage a healthy housing markets, states can: analyze state housing market conditions to design appropriate policies, encourage housing production in high demand places (this includes incentives, oversight of local land planning, pre-empt zoning), provide financial support to low-income households, reduce climate risks.	Implement these changes at a state wide level.
Do Lawsuits Build Housing: The Implications of Exclusionary Zoning Litigation	A. Mallach; C. Rutgers	Looking at New Jersey, this article looks at litigation as a means to ending barriers to housing production and outcomes like discrimination. The authors point to exclusionary zoning as a main barrier to production, they also note that financing and tax exempt revenue bonds play a major role in the strain of production.	Legislative reform of zoning ordinances.
Restricting Residential Construction	E. Glaeser	Based on data from 2000-2005, the author argues that overly restrictive zoning has limited the supply of development rights and driven property prices up. Low levels of permitting are found in high price areas, additionally the lack of permitting was not from a shortage of land. Neither construction costs nor land prices fully explain high property prices, this is also a zoning issue. Nonstructure related zoning is the most troubling regulation	No solutions offered.
Zoning as a Barrier to Multifamily Housing Development	G. Knapp, S. Meck, T. Moore, R. Parker	In some jurisdictions, zoning impedes the development of high-density multi-family housing, no single indicator provides unambiguous evidence of regulatory barriers.	Oversight of local zoning by a regional agency appears to mitigate regulatory barriers.
Both renters and homeowners could benefit from better housing policy	J. Schuetz	In well functioning housing markets, supply will expand to accommodate population and job growth, but in some regions, supply is limited by excessive zoning regulation. Overly excessive zoning reflects the policy choices of local governments and NIMBY's. Zoning reforms would allow communities to build more housing and to use less land per housing unit. Zoning reform would also reduce the complexity and cost of development.	Greater coordination between federal, state, and local governments, including sustained investments in human capital, infrastructure, and targeted economic development.
How Do Developers Respond to Land Use Regulations? An Analysis of New Housing in Los Angeles	C. Gabbe	This article attempts to explain how real estate developers respond to different kinds of land use regulations. Looking at Los Angeles, developers are commonly constrained by density limits and parking requirements, and regulatory implementation such as if developers are able to exceed limitations.	Planning and regulation must be linked with societal outcomes. Cities and state governments should scrutinize regulatory provisions and the state should provide developer incentives.

Title	Author	Summary	Solution
Looking Through the Lens of Size: Land Use Regulations and Micro-Apartments in San Francisco	C. Gabbe	This article focuses on San Francisco and asks whether regulatory barriers to the development of new small units exist. The findings suggest these barriers do exist specifically: parking requirements, outdoor open space requirements and indoor common-space requirements, unit mix requirements, and inclusionary zoning. Because some of these regulations shift cost from the localities to developers, requirements privilege larger units by adding costs to the development of the smaller ones.	One solution is to eliminate the remaining minimum parking requirements in medium and high density zones. For open space, regulations should be applied to unit square footage rather than on a per-unit basis, additionally a city should develop common space requirements that are consistent, and an in-lieu fee multiplier for micro-apartments.
Parking requirements as a barrier to housing development: regulation and reform in Los Angeles	M. Manville; D. Shoup		Reducing parking regulations.
Response to "Regulatory Implementation: Examining Barriers From Regulatory Processes" by Peter J. May	H. Tregoning	Local and state laws and barriers often increase the costs of construction which is passed down to the homebuyer. In MA alone, more than 40 communities have adopted local provisions that restrict or ban new construction. May identified the following barriers: regulatory approvals (permit process), regulatory enforcement (strict and unsupportive regimes), irregular admin (gaps in process).	Solutions include: one-stop permitting, third party certification, administrative streamlining, consensus building, code simplification, facilitative reviews. Additionally, at the local level, encourage conversion of commercial or industrial vacancies into housing, allow developers to build housing that fits the historic character of the community, and participate in affordable housing development. The state should provide incentives and conduct research that links housing affordability to increased economic outcomes.
U.S. rental housing markets are diverse, decentralized, and financially stressed	S. Crump; J. Schuetz	The US provides more housing subsidies to homeowners rather than renters, the primary source of funds for new construction of below market rental housing comes from LIHTC. Barriers such as zoning laws often block where rental housing can go, these local restrictions to construction as well as federal tax policies limit construction of rental units.	No solutions offered.
Chapter 19 - Regulation and Housing Supply	S. Crump; J. Schuetz	Regulation appears to raise house prices, reduce construction, reduce elasticity of housing supply, and alter the urban form. There is low cost to entry, and labor and materials are not a major constraint on residential development. In theory, the availability of buildable land might not constrain the supply of housing units if housing could be conducted as densely as necessary to meet demand, but restrictions have increased the cost of production which has decreased construction.	No solutions offered.

## Exhibit B.5 Category 1: Taxes

Article	Author	Summary	Solution
Sand Castles Before the Tide? Affordable Housing in Expensive Cities	G. Metcalf	This article focuses on cities with economic success yet permanent crises of affordable housing development. The tendency for mis regulation of housing can be attributed as judicial fragmentation including the local need to raise money for services (local taxation), as well as local control of development regulation and NIMBY.	Solutions include upzoning, rethinking minimal standards, connecting more expensive cities to less expensive ones through transportation, building more cities, pooling taxes regionally and redistributing them on a per-capita basis, moving responsibility for housing to higher levels of government, and spending more on social housing generally.
Regulation and the High Cost of Housing in California	J. Quigley; S. Raphael	Cities in California are free to set rules independently which results in higher levels of regulation and lower levels of housing production. State tax policy creates incentives that are likely to decrease production and increase cost of housing. Property taxes are limited to 1% of acquisition costs, while cities are permitted a share of local tax receipts which creates regulatory incentives to favor retail development over housing construction. Higher rates of regulation in tandem with tax policies produce lower rates of housing development.	No solution is given.
The Economic Implications of Housing Supply	E. Glaeser,; J. Gyourko	This article investigates whether market prices equal the cost of producing a unit. If housing prices are above cost, the gap is a regulatory tax which might be efficiently incorporating negative externalities of new housing production, but typical estimates find that implicit tax is far higher than most reasonable estimates of externalities. Where housing is highly regulated, prices are higher. Advocates of land-use restrictions emphasize negative externalities of building, but research on local costs and benefits of restrictions conclude that negative externalities are not large enough to justify the cost of regulation.	More fiscal resources will be needed to convince local residents to bear costs of new developments.
Tax Limits and Housing Markets: Some Evidence at the State Level	W. Hoyt; P. Coomes; A. Biehl	Property tax limits have little impact on growth in housing stock, but education spending limits reduce the number of building permits by over 6%. The number of housing units may grow when property tax limits are accompanied by increases in other own-source revenue to state government. Additionally, states that increase taxes and fees while limiting property taxes, on net result in public services desired by households.	No solution is given.
To improve housing affordability, we need better alignment of zoning, taxes, and subsidies	J. Schuetz	To increase housing affordability, cities need reformed land regulations, increased taxes on expensive, underused land, and to expand housing subsidies to low-income households. Specifically, cities need to reduce regulatory barriers like zoning which includes height caps and minimum lot sizes; taxes that charge higher tax rates on land and lower rates on structures encourage owners of expensive land to build more intensively, and land value taxes paired with upzoning would change incentives for these owner-occupants.	Congress needs to demonstrate political will to spend more money on poor through subsidies. States can create legal framework under which localities operate to change zoning and local tax structures.

## Exhibit B.6 Category 1: Physical Constraints

Article	Author	Summary	Solution
Removing barriers to accessing high-productivity places	D. Shoag	Legal land use restrictions have limited construction in America's richest locations. The increase in home price has also made higher wage places unaffordable to less educated workers. There are three main types of regulation: use- regulation or zoning; formed based regulations like minimum lot sizes, maximum height, or parking requirements; and process regulations like public review and the long permitting and approval process.	Solutions to these issues include easing restriction at the local level and shifting taxes away from development as well as removing process barriers. At the state level, policies can be created that mandate localities to ease regulations and transportation can be expanded. At the federal level, tax incentives can be reduced and federal funding can be linked to progress on land-use restrictions.
Who's to blame for high housing costs? It's more complicated than you think.	J. Schuetz	Many assume housing costs are so high due to land use regulation or gentrification however this article argues that risk and regulation determine what gets built. Regulatory features determine what type of housing to build and often comes in the form of impact fees. Development falls into two categories: greenfield or infill, both types of development face zoning and development costs which pose challenges. Additionally environmental review and rezoning pose physical constraints to land needed to build.	No solution given.
How Adaptive Reuse Can Help Solve the Housing Crisis	T. Walk-Morris	Construction has failed to resolve the shortage of rental units at diverse prices, post COVID, many office buildings are empty, abandoned, or obsolete. Adaptive reuse could solve the lack of affordable housing and excess of empty, unproductive buildings.	Reform is necessary to reuse these buildings. This includes zoning ordinances needing to be waived and rethinking building codes that would encourage historic adaptive reuse projects.
Tracking Land Supply for Growth Management	S. Bollens; D. Godschalk	Accurate land supply information is often missing from growth management programs, with this support, growth policies will not contribute to land and housing inflation by overstraining land supply. This land information is a policy tool to help project future conditions and creates a credible system of developable land for potential housing construction.	Implementation of a land monitoring system that includes a price analysis.
Regulations Driving Boston Housing Prices Higher	L. Gilroy	This study of Boston shows that cities and towns are driving up housing prices by forcing developers to conform to an array of land-use rules that make it difficult to build new homes. Mandates lot sizes and overly restrictive wetland rules are often cited as significant barriers to construction. The author states that the belief that land is scarce is not accurate and that the housing affordable crisis in Boston is man-made, created by these regulations.	Reduced regulations.
Barriers to affordable housing on brownfield sites	G. Squires; N. Hutchinson	There are both economic and financial barriers to developing on brownfields that are perceived to be risky and costly to development. Significant barriers include: engaging with economic geography, integrating economic viability and sustainability concerns, increasing affordable housing quality, transcending scale to improve policy tool efficacy.	Greater scrutiny on internal and external costs for viability.

## Exhibit B.7 Category 2: Construction Costs

Article	Author	Summary	Solution
Making apartments more affordable starts with understanding the costs of building them	H. Hoyt; J. Schuetz	Supply of rental housing did not keep up with demand. The authors consider the barriers to this issue to be land use regulation, increased cost of construction, labor and materials, and greater market concentration. Improved design and construction could reduce cost of building multifamily housing. Rising rents reflect substantial costs increases in land, labor, materials and these costs get passed on to renters or buyers.	The solution is to reduce land costs, hard costs (construction, labor, materials), and soft costs (engineering, financing, permitting, and impact fees)
Residential Construction Costs and the Supply of New Housing: Endogeneity and Bias in Construction Cost Indexes	C. Somerville	Increased cost of construction should reduce supply of new housing, this is due to bias in commercial cost indexes used in existing housing supply studies and is likely the cause of poor performance in existing estimates of supply of new single family housing. This bias is caused by incorrect measure of labor costs and failure to address the endogeneity of construction costs.  Policies that increase input costs for construction are not without other costs including this reduction of construction.	No solution given on how to increase construction, however future housing supply studies should use greater care in selecting measures of costs.
Why is Manhattan So Expensive? Regulation and the Rise in Housing Prices	E. Glaeser; J. Gyourko	Housing prices in Manhattan have soared since the 1990's. Demand has increased, but on the supply side, the marginal cost of supplying housing is the cost of adding an extra floor to a building. Examining the gap between construction costs and home price, construction costs are higher due to an increase in labor costs, as well as regulatory taxes and permitting. Price markups in construction are a strong indication of artificial barriers to new housing. Construction is also becoming more restricted thanks to NIMBY sentiments.	No solution given.
Critical barriers to sustainability attainment in affordable housing: International construction professionals' perspective	M. Adabre, et. al	This study looks at critical barriers to sustainable affordable housing from an international perspective, specifically at barriers within components of land-market, incentive, housing-market, and infrastructure-related. Within the United States, the most common barriers are income segregation, zoning, construction costs, NIMBY, and low incentives for investors.	The authors suggest that affordable housing should be promoted within the U.N.'s sustainable goals.
Construction Costs and the Supply of Housing Structure	J. Gyourko; A. Saiz	Differences in construction across markets do not explain variation in costs. Instead of inelastic supply, supply shifters that do account for differences in building costs include extent of unionization within the construction sector, local wages, local topography, and regulatory environment (costs are considered materials, labor, and equipment). In areas with relatively low land values, high construction costs could make new development or redevelopment unfeasible if the market value of a house may be lower than construction costs.	No solution given.
Did Overzealous Activists Destroy Housing Affordability in San Francisco?: A Time-Series Test of the Effects of Rezoning on Construction and Home Prices, 1967—1998	K. Beitel	The author tests whether strict zoning in San Francisco restricts housing construction, and finds that instead of zoning, barriers to construction include interaction of financial market variables, household search behavior, and the unique characteristics of urban land markets. Removing excessive zoning will not lead to more housing, instead the market is systematically biased against the production of housing affordable to the majority of SF residents. Lower-priced construction will shift toward peripheral regions, giving rise to the observed pattern of rapidly appreciating central city land and property values and the concurrent spread of cheaper residential construction from the urban core.	Increasing the supply of affordable housing will require large-scale public subsidies to compensate for the failure of the market to meet the pressing housing needs of low-income households.

Article	Author	Summary	Solution
HUD Secretary Pledges to Work with Builders to Tackle Housing Affordability Crisis - NAHB	E. Thompson	Ben Carson announced that he wants the government to work with builders to address the nation's affordability crisis. This includes reducing regulatory costs by incentivizing officials to cut back on state and local regulatory barriers like outmoded zoning and land use restrictions. Carson also plans to expand HUD's LIHTC program into new construction and substantial rehab loan products.	Reduced regulation
Environmental Reviews and Case Studies: Water and Sewer Infrastructure Challenges as a Barrier to Housing Development in the Marcellus Shale Region	B. Kolb; J. Williamson	Lack of infrastructure served as a significant barrier to housing construction in Lycoming County, Pennsylvania. In many rural and small town communities where there is natural gas development, there is a significant lack of infrastructure, which limits new housing.	Solutions include building where the infrastructure is already located, encouraging brownfield development by razing older, substandard housing for new development, and encouraging cooperation between developers and infrastructure providers across developments.
Teamwork Focuses on Building Housing Supply	L. Ettinger	A study conducted in 2013 showed that there was a large demand for market-rate, multifamily housing in downtown Tucson, but not for owner occupied units. A year later a streetcar began operations that served as a catalyst for commercial and high-density transit-oriented housing project that were primarily rental. Comparing development costs of a building offering condos for sale or apartments for rent, the analysis showed how financing and other expenses had been driving decisions to build rental buildings.	Facilitating increased supply.
A Home Builder Perspective on Housing Affordability and Construction Innovation    Joint Center for Housing Studies	K. Colton; G. Ahluwalia	Labor cost and availability is the number one issue related to housing affordability for both single and multifamily builders. The cost and availability of building materials is also a serious problem. Finally regulatory barriers also play a role, especially the permitting process and zoning.	A number of builders plan to increase the use of innovative design/methods, opposed to the stick-built approach, in the coming years, these technological innovations ideally will help with housing affordability.
The Housing Construction Morass	I. Brannon	Post 2008 recession, housing has significantly declined. Local government has created barriers, raising costs to construction and financing for new homes is more difficult. This lack of construction has reduced employment and discouraged job seekers from moving to locations of hot job markets.	Given that it's unlikely the federal government will override state and local regulations, financing reform could modestly increase homeownership.
Who Bears the Burden of Development Impact Fees?	F. Huffman, et. al	Land may sit undeveloped for years and owners do not pay user charges, sales tax, and other exactions on land. Since their holding costs are low, landowners may not be willing to sell at prices that offset impact fees, as a result, developers cannot expect landowners to pay a large share of impact fees. As a result, homebuyers, renters, or tenants will bear the burden of development impact fees. Since communities will not expand supply unless development pays the fees first, there will always be a lag of supply.	No solution given.
Action on Supply Chain Bottlenecks, Tariffs Needed to Boost Housing Affordability - NAHB	E. Thompson; S. Pagan	Supply chain bottlenecks are harming housing affordability by removing trade barriers and having a disproportionate effect on small home-building firms. Without economies of scale, small development firms cannot negotiate discounts on materials.	On the trade front, Congress should suspend duties on a wide array of imported building materials and goods. Policymakers must also continue to aggressively explore solutions to ease building material supply chain disruptions that are causing project delays.

### Exhibit B.7 Category 3: Number of Builders

Article	Author	Summary	Solution
Land Regulation and the Price of New Housing Lessons from Three California Cities	J. Landis	Housing markets in which developable land supplies are restricted are likely to be dominated by a small set of homebuilders who can exercise monopoly power over prices and product. This research looks at California metro cities in the mid to late 20th century. The author suggests that there is a range of sustainable market outcomes that are competitive but that differ from price-approaches-marginal-cost outcomes associated with classical models of perfect competition.	Planners should understand structure to local homebuilding industry is important to determine the effects of land use controls on local housing markets and planning should be designed accordingly.
The barriers to using urban infill development to achieve smart growth	J. Farris	The smart growth movement has encouraged significant infill to control sprawl and promote revitalization. Barriers to infill development include: land assembly and infrastructure costs, unwillingness to condemn, regulatory policies, difficulty of finding developers, complexities of private-public partnerships, risk, and NIMBY. Infill necessitates a local home-building industry to specialize and many smaller local niche developers are undercapitalized and have limited capacity.	Advocates should focus on encouraging higher density development on open peripheral land.
Regulatory barriers to the diffusion of innovation: Some evidence from building codes	S. Oster; J. Quigley	Authors try to identify determinants of differences across communities in local regulations, these can be explained by attributes of local firms, labor unions, building officials and demand. Relative size of homebuilding firms is also one aspect that affects diffusion of innovation in residential construction. The small scale of firms in the construction industry may reduce incentives for private research and development. Additionally fragmentation of the market is reflected, not only in the large number of small firms but also in the arduous regulatory process that relies on local political division to set standards and enforce regulations.	No solutions given.
Appraising Detroit: A Follow-Up to HUD's "Barriers to the Rehabilitation of Affordable Housing Study"	B. Gormley	According to the 2001, HUD Barriers to the Rehabilitation of Affordable Housing report, financing and property acquisition pose the greatest challenges to development and construction. Additionally, zoning, specifically, environmental and historic regulations create the most substantial barriers to effective rehab efforts. Looking specifically at Detroit, researchers found that poor cooperation between developers and city officials created barriers, as well as the low supply of available contractors which in turn raised the cost of developers obtaining services. Despite the HUD report, in Detroit, insurance, cost estimation, zoning ordinances, and housing and historical regulations did not present particular challenges.	No solutions given.

## Exhibit B.8 Category 5: Neighborhood Opposition

Article	Author	Summary	Solution
	J. Mangin	The new anti-development orientation of some cities is turning them into "preserves for the wealthy as housing costs increase beyond what lower income families can afford; this is the new exclusionary zoning". High costs in suburbs and cities are the problem of supply and demand, in this case, prices get bid up to ration existing stock. The problem with this, is that in the suburbs, NIMBY reigns supreme and courts won't intervene which often leads to gentrification.	The solution is to use economics as a positive tool to think through causes and potential solutions of some problems that cause gentrification. Solutions need to be incremental, unlike the judiciary reforms pushed by Mt. Laurel, the author believes incremental incentives to reduce NIMBY opposition will be the most useful, this can include tax-increment-local-transfers as well as zoning budgets.
The Nuances of NIMBY: Context and Perceptions of Affordable Rental Housing Development	C. Scally	This research asks why some communities support publicly- assisted affordable housing development, while other do not, specifically how these communities support or oppose development within the area of NIMBYism. NIMBYism persists in both cities and suburbs and can be broken down into categories of "attitudes on a personal basis" and "institutionalized action". Looking at 6 cities in New York, the author finds that NIMBYism is highly differentiated based on local legacies, development environment and conditions.	Communities need assistance through incentives to break down past development patterns. This can include partnerships with state entities and developers to ensure that projects support themselves financially, this also includes more transparency, specifically of LIHTC programs.
Anti-Snob Land Use Laws, Suburban Exclusion, and Housing Opportunity	S. Cowan	Excluding poor from cities has created higher concentrations of minority poor in cities surrounded by white, affluent, exclusionary suburbs. Three New England states created anti- snob laws that make it easier to bypass community involvement (NIMBY, exclusionary zoning) in affordable housing development. What the author found was that anti-snob laws are effective in the creation of more affordable housing, however the impact of the law is greater in areas of less affluence and higher diversity.	No solution provided. More research is needed to determine how to greater expand the impact of these laws.
Opposition to Housing: NIMBY and Beyond	R. Pendall	While NIMBY connotes a selfish desire to abdicate responsibility for important community facilities, we should presume that no single motivation can explain opposition. Looking at protest in SF, the author states that while NIMBY can be racist or classist, it can also provide information about the current state of neighborhood services. They found that projects with affordable housing do generate more protest, however the affordable element is rarely mentioned in the protest, additionally, anti-growth and NIMBY are more common in areas of lower-median income.	Streamlined approval processes generate less controversy, as do a lessened permit or public approval process. Finally projects approved by a planning commission with appointed members are blocked less than projects approved by a city council with elected officials.
The Federal Role in Reducing Regulatory Barriers to Affordable Housing in the Suburbs	M. Schill	In 1991, HUD delivered a report detailing how suburbs have created regulatory barriers to low and moderate income housing. These barriers are generally NIMBY motivated. Congress has the power to force states and localities to relax regulation which ideally will create laboratories of democracy in which localities will try to create innovative systems of regulation that can be tested on a small level. However, federal affords have generally been unsuccessful.	For NIMBY opposition to be diminished, the federal government can take over a greater share of the cost of public services, provide more grants-in-aid, and create efforts to produce neighborhood stability and integration which can reduce NIMBYism toward affordable housing developments.

Article	Author	Summary	Solution
Growth Management: Satan or Savior? Regulatory Barriers to Affordable Housing; In Defense of Growth Management	A. Downs	Responding to the 1991 HUD report about NIMBYism, authors state that regulation is not what causes housing affordability problems, instead most widespread problems are caused by poverty. In this case, local zoning regulations often block construction of moderate cost and multifamily housing throughout the suburbs	Federal housing assistance in the form of vouchers
Recalibrating Local Politics to Increase the Supply of Housing	C. Elmendorf	In California, the inadequate supply of housing can be attributed to local governments being dominated by homeowners who have a vested interest in the land-use status quo and many tools to get around state mandates.	Using state planning mandates as political retribution, auctioning the upzone
Zoning Barriers to Manufactured Housing	D. Manelker	Zoning represents the major challenge to the construction of manufactured housing. Zoning barriers arise from community and resident concerns about the safety, quality, appearance, occupants, and price appreciation of manufactured housing and the impact it could have on neighboring property values.	Legislative change that would open up the zoning system for manufactured housing and restrict its rejection as a conditional use, as well as federal law that would require procedural protections in decision making under local ordinances and to preempt zoning barriers to manufactured housing.

## Exhibit B.9 Category 5: Political Will

Article	Author	Summary	Solution
Changing Residential Land Use Regulations to Address High Housing Prices	C. Gabbe	Cities have been recommended to update their zoning codes to enable more affordable and market rate housing development. In the case of Los Angeles, progress has been modest and limited at best. Many of the changes that have taken place resulted from CA state law rather than municipal initiative (political will) this probably from homeowner influence that prevented larger reforms from being made.	Planners should support state preemption of local zoning requirements and new state laws which can allow cities to meet goals while providing political cover to elected officials.
Barriers to Integrating New Urbanism in Mixed- Income Housing Plans in Chicago: Developer, Housing Official, and Consultant Perspectives	A. Jackson	This research looks at barriers to mixed-income development that incorporates goals (new urbanism) of HOPE VI. The idea of new urbanism is constrained by limited interagency coordination, restrictive design, low community buyin, and exclusive marketing and occupancy practices. Findings suggest that new urbanism isn't the issue, implementation is.	Solutions include improvement of interagency coordination and fostering a sense of community. Additionally, developers should include more architects and planner participation in the process, eliminate restrictive design guidelines, and target existing public sites in advantageous locations.
Transaction Costs and the Land Use Planning Process	C. Dawkins	In a world of zero transaction costs, public policy intervention is unwarranted and irrelevant. Public sector land use plans should represent a collective contract between land use interests and the local government. Success of these developments may depend less on devising overly restrictive land use policies. Instead economic benefits of land use planning intervention (political will) should be weighed against transaction costs to justify land use planning measures on efficiency grounds.	No Solution given.
From Middle to Upper Class Sprawl? Land Use Controls and Changing Patterns of Real Estate Development in Northern New Jersey	T. Rudel, et. al	The 1950's-1980's saw laws that promoted middle class sprawl, this regulatory shift can be explained as the homevoter hypothesis that derives new controls from economic interests of suburban homeowners and the regional spillover effect that attributes adoption of new control to desires of planning commissions, consultants, and NGO's to do as other communities are doing. Looking at New Jersey during this time, authors determine that the regional spillover effect drove the sprawl process.	No Solution given.
Unwanted Housing: Localism and Politics of Housing Development	M. Manville; P. Monkkonen	There is a rhetoric that new housing causes problems and should regulate local impacts for benefit of local residents alone. This idea of localism drives planners to work for existing residents. This study looks at localism in California and determines that it is hard for elected officials to use political will because of localism as well as many laws being voter driven in the state. Given that white, wealthier homeowners are more prevalent at hearings for proposed developments, localism has created issues of housing development.	State officials in expensive building markets should use power to expand range of people and places that local planning practice considers when it examines new housing.
Removing Regulatory Barriers to Affordable Housing in Development Standards, Density Bonuses, and Processing of Permits in Hillsborough County, Florida	S. Casella; S. Meck	In 2007, Hillsborough County Florida, undertook an initiative to identify and eliminate regulatory barriers. The main barriers were subdivision/development standards, inconsistent density requirements, and the processing of permits. The study suggested regulatory streamlining to simplify and accelerate the permit process as well as the revision of land development regulations and codes.	Recommendations relating to processing of permits address unclear responsibilities and standards, insufficient advance planning and zoning, lack of waivers and uniformity, and an excessive number of hearings.

Article	Author	Summary	Solution
San Diego's Affordable Housing Dilemma	C. Fiscelli	In San Diego, there is a shortage of housing. One solution is affordable housing, however this often means tax credits for corporations to produce rentals in some of the most expensive areas in the city. Growth boundaries, project approval slow-downs, and Prop 13 provide incentives for cities to approve commercial uses over new housing projects. Zoning and development impact fees drive up housing prices by being passed on to homebuyers.	Gaining housing should include tradeoffs, more time should be spent planning on the local neighborhood level. Additionally, need great community buy-in through raising salaries instead of subsidizing housing.
Housing Needs in Rural Communities	B. Yust, et. al	Small rural communities often face housing needs that are not being met. Some of the barriers include: cost of land, there is not to build and if there was, there is no money to do it, there is only one major industry in town, most people didn't care whether the town prospered or not, not enough people saw the need, and no easy access to grants.	Professionals need to help decision makers understand the importance of affordable housing for young adults. Nonprofits need to be innovative and residents need to know about available programs and understand how to access financial tools necessary to develop housing.
Regulatory implementation: Examining barriers from regulatory processes	P. May	Barriers include delays in construction and rehab of housing related to the long decisionmaking process and discouraging housing development in the first place. Within these groups, barriers include zoning, and other similar regulatory process barriers like pre-approval meetings, submission of plans, special studies, community hearings, and approval decisions. Developers share concerns over delays in the permitting process, inconsistencies with regulatory requirements, and NIMBY.	Solutions include: electronic permitting and one-stop permits, enforcement delegation and third party certification, administrative reorganization, conflict reduction and consensus building.

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# Section D: Previous Housing Surveys

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## Summary of Methods

Data in this appendix is derived from three surveys.

Survey data was derived from Oregon’s Housing Affordability Crisis: Results of a Statewide Survey of Oregon Cities was a survey conducted to understand the state of housing affordability in communities in Oregon. The survey was administered to City Managers and Staff Planners from all Oregon cities in Oregon during fall 2017. The survey included questions surrounding issues of housing affordability, needed types of housing, barriers to providing housing, and policy adoption. Individuals were asked to take the survey by using an email database provided by the League of Oregon Cities. The League of Oregon Cities gave permission to use the database for the research. Individuals chose to take the survey voluntarily. After initial recruitment, several follow up emails were sent to remind participants to complete the survey. Blank responses were removed (when a participant opened the link but did not answer any questions). Some cities provided multiple responses because of technical issues. The most complete response provided was used and the other attempts were deleted. The sample size was 115 cities out of 242, approximately 48 percent of Oregon cities. For the purpose of this manuscript, we classify cities by city size (under and over 25K) and region (inside and outside the Portland or Willamette Valley corridor – the most densely populated regions of the state.)

A near replica of this survey was administered by the state of Oregon Department of Land Conservation and Development by legislative mandate in 2018 and 2019 to cities over 10,000 with “severely rent burdened city” as described as 25 percent of renters paying over 50 percent of their income for housing. (HB 4006, 2018)

## Response Rates

The 2017 survey was sent to representatives (city manager, planning director, or housing specialist) from all 242 Oregon cities. We received 115 valid responses, a 48% response rate. The number of responses varies by question because some respondents skipped some questions.

It is important to note that the 2018 and 2019 survey was not distributed to all cities—only cities with severe renter cost burden received the survey. Thus, we report the n= instead of the response rate.

Exhibit C.1 shows survey response numbers and 2017 rates by city size. In 2017, 47% of cities under 25K responded to the survey while 55% of cities over 25K responded to the survey. There are only 20 cities over 25K in population in the state of Oregon. In 2018 and 2019, there were under 30 responses each year because only certain cities were required to complete the survey. All cities under 10,000 were exempt from completing the survey.

### Exhibit C.1 Survey response by city size, 2017–2019

City Size	Total Rate (2017)		n=		
	#	%	2017	2018	2019
Under 25K	222	47%	104	17	13
Over 25K	20	55%	11	17	14
<b>TOTAL</b>	<b>242</b>	<b>48%</b>	<b>115</b>	<b>24</b>	<b>27</b>

Source: Oregon Housing Affordability Survey, UO Institute for Policy Research and Engagement, Q1; DLCD HB 4006 Survey, 2018 and 2019

Exhibit C.2 shows survey response rates by region for cities in the Willamette Valley or Portland Metro and the rest of the state. In 2017, the responses rates were similar, at 46% for cities in other regions and 49% for cities in the Willamette Valley and Portland Metro. However, in 2018–2019, there were a higher number of responses in the Willamette Valley and Metro. This is because more cities were classified with severe renter burden in the more populated Willamette Valley and Metro regions of the state.

### Exhibit C.2. Survey response by region, 2017–2019

Region	Total Rate (2017)		n=		
	#	%	2017	2018	2019
Rest of State	142	46%	66	13	9
Willamette & Metro	100	49%	49	21	18
<b>TOTAL</b>	<b>242</b>	<b>48%</b>	<b>115</b>	<b>24</b>	<b>27</b>

Source: Oregon Housing Affordability Survey, UO Institute for Policy Research and Engagement, Q1; DLCD HB 4006 Survey, 2018 and 2019

## Analysis

Exhibits C. 3 and 4 shows survey responses for respondent’ perceptions of the various barriers as moderate or extreme barriers to providing affordable housing. These data are organized by category (described in the literature review) and presented by city size and region. Data are shown for 2017–2019. Data highlighted in orange are perceived as severe or moderate barriers by the largest share of respondents while data cells highlighted in green are perceived as the least severe barriers (lowest percentage ranked moderate or extreme). In examining the data in 2018 and 2019, it is important to note that the Department of Land Conversation and Development made adaptations to specific questions, so it is not feasible to compare all categories across time.

Over time and across cities, many of the barriers associated with supply of buildable land (Category 1) are perceived as the most extreme across city size including lack of available vacant land, inability to bring land to a development ready state, and cost of land. Additionally, in Category 3, planners consistently ranked “developers are not building housing that is needed and affordable,” as an extreme or moderate barrier. In 2018 and 2019, high construction costs were perceived as a barrier by a large share of cities.

It is also interesting to note the barriers not seen by most cities as moderate or extreme. Planners consistently ranked Category 5 barriers including permit fees, length of time to process permits, and

uncertainty in the land use entitlement process among the lowest. Category 4: Lack of Market Demand was also not rated highly by planners.

Comparing across city size, most of the rankings were consistent with a few exceptions. More larger cities considered neighborhood opposition to be a barrier the 2017 and 2018 surveys. However, in 2019, a greater percentage of smaller cities rated neighborhood opposition as a barrier. A smaller share of larger cities perceived building codes and lack of market demand as less significant barriers than smaller cities. On the other hand, fewer planners in smaller cities perceived uncertainty in the process or the time to process permits as significant barriers.

Considering the data regionally provides interesting trends as well. The cities in the Willamette Valley and Portland Metro are more similar to cities in the rest of the state than expected. While the data over time and across regions is relatively consistent and mirrors trends described above related to city size, there are some notable trends by region. A much greater percentage of cities outside of the Willamette Valley and Portland saw lack of financing and lack of construction workers as extreme or moderate barriers to constructing housing.

Exhibit C.3: Barriers by Category and City Size, 2017-2019 surveys

	2017			2018			2019		
	n=115 All Cities	n=12 Over 25K	n=103 Under 25K	n=31 All Cities	n=16 Over 25K	n=15 Under 25K	n=26 All Cities	n=13 Over 25K	n=13 Under 25K
<b>Category 1: Supply of Buildable Land</b>									
Lack of available vacant land (e.g. for sale or owned by builders)	59%	64%	59%	74%	75%	73%	65%	77%	54%
Inability to bring land to a development ready state (e.g. bringing tract land to serviced lots ready for development)	50%	55%	49%	65%	69%	60%	73%	77%	69%
High cost of land	57%	83%	54%	77%	87%	67%	84%	91%	79%
Zoning restrictions (e.g. lot size, minimum density requirements, etc.)	22%	27%	21%	N/A	N/A	N/A	N/A	N/A	N/A
Not enough land zoned for missing middle housing	N/A	N/A	N/A	43%	60%	27%	50%	62%	38%
Not enough land zoned for multi unit	N/A	N/A	N/A	48%	38%	25%	40%	33%	46%
Other Zoning restrictions (e.g. lot size, minimum density requirements, etc.)	N/A	N/A	N/A	13%	20%	7%	38%	38%	38%
Parking requirements	17%	27%	15%	32%	44%	20%	31%	31%	31%
Building code requirements	15%	0%	16%	16%	0%	33%	19%	0%	38%
City system development charges (SDCs)	26%	33%	25%	47%	53%	40%	40%	38%	42%
Constrained lands (e.g. wetlands, steep slopes, etc.)	42%	42%	42%	38%	38%	38%	46%	38%	54%
Other SDCs (e.g. Special Districts)	13%	18%	12%	23%	19%	27%	12%	15%	8%
<b>Category 2: Factor Costs</b>									
High Construction Costs (labor and materials)	N/A	N/A	N/A	90%	87%	93%	92%	100%	85%
Lack of financing for land development	N/A	N/A	N/A	53%	47%	60%	48%	50%	46%
Lack of financing for housing construction	N/A	N/A	N/A	52%	44%	60%	50%	55%	46%
<b>Category 3: Industry Structure</b>									
Developers are not building the type of housing that is needed and affordable	59%	82%	56%	73%	73%	73%	88%	83%	92%
Not enough Construction workers	N/A	N/A	N/A	65%	50%	80%	52%	46%	58%
<b>Category 4: Demand</b>									
Lack of market demand	19%	25%	18%	13%	7%	20%	23%	15%	31%
<b>Category 5: Process</b>									
Lack of political will from elected officials	14%	0%	15%	19%	25%	13%	16%	15%	17%
Opposition from neighbors	28%	58%	25%	71%	75%	67%	40%	25%	54%
Permit fees	13%	9%	13%	16%	20%	13%	12%	8%	15%
General uncertainty in the land use entitlement process	12%	27%	10%	16%	25%	7%	23%	31%	15%
Length of time it takes to process land use entitlements	11%	27%	9%	13%	19%	7%	20%	33%	8%
Length of time to process building permits	N/A	N/A	N/A	13%	6%	20%	8%	8%	8%

Top 5 Barriers (Higher %)	2017			2018			2019		
Bottom 5 (Lower %)	All cities	WV+ Metro	Rest	All cities	WV+ Metro	Rest	All cities	WV+ Metro	Rest
	n=111	n=47	n=64	n=31	n=20	n=11	n=26	n=17	n=9
<b>Category 1: Supply of Buildable Land</b>									
Lack of available vacant land (e.g. for sale or owned by builders)	<b>64%</b>	56%	59%	<b>74%</b>	75%	73%	<b>65%</b>	71%	56%
Inability to bring land to a development ready state (e.g. bringing tract land to serviced lots ready for development)	<b>48%</b>	51%	50%	<b>65%</b>	65%	64%	<b>73%</b>	82%	56%
High cost of land	<b>60%</b>	55%	57%	<b>77%</b>	70%	90%	<b>73%</b>	82%	56%
Zoning restrictions (e.g. lot size, minimum density requirements, etc.)	<b>30%</b>	16%	22%	<b>N/A</b>	N/A	N/A	<b>N/A</b>	N/A	N/A
Not enough land zoned for missing middle housing	<b>N/A</b>	N/A	N/A	<b>43%</b>	50%	30%	<b>50%</b>	59%	33%
Not enough land zoned for multi unit	<b>N/A</b>	N/A	N/A	<b>48%</b>	45%	55%	<b>40%</b>	38%	44%
Other Zoning restrictions (e.g. lot size, minimum density requirements, etc.)	<b>N/A</b>	N/A	N/A	<b>13%</b>	15%	10%	<b>38%</b>	47%	22%
Parking requirements	<b>22%</b>	13%	17%	<b>32%</b>	30%	36%	<b>31%</b>	29%	33%
Building code requirements	<b>9%</b>	19%	15%	<b>16%</b>	10%	27%	<b>19%</b>	18%	22%
City system development charges (SDCs)	<b>38%</b>	38%	38%	<b>47%</b>	40%	50%	<b>40%</b>	41%	38%
Constrained lands (e.g. wetlands, steep slopes, etc.)	<b>40%</b>	43%	42%	<b>38%</b>	42%	30%	<b>46%</b>	41%	56%
Other SDCs (e.g. Special Districts)	<b>14%</b>	11%	13%	<b>23%</b>	25%	18%	<b>12%</b>	18%	0%
<b>Category 2: Factor Costs</b>									
High Construction Costs (labor and materials)				<b>90%</b>	85%	100%	<b>84%</b>	94%	67%
Lack of financing for land development	<b>N/A</b>	N/A	N/A	<b>53%</b>	42%	73%	<b>48%</b>	47%	50%
Lack of financing for housing construction	<b>N/A</b>	N/A	N/A	<b>52%</b>	35%	82%	<b>50%</b>	50%	50%
<b>Category 3: Industry Structure</b>									
Developers are not building the type of housing that is needed and affordable	<b>57%</b>	60%	59%	<b>73%</b>	75%	70%	<b>88%</b>	94%	78%
Not enough Construction workers	<b>N/A</b>	N/A	N/A	<b>65%</b>	45%	100%	<b>52%</b>	35%	88%
<b>Category 4: Demand</b>									
Lack of market demand	<b>21%</b>	16%	19%	<b>13%</b>	11%	18%	<b>23%</b>	24%	22%
<b>Category 5: Process</b>									
Lack of political will from elected officials	<b>20%</b>	10%	14%	<b>19%</b>	10%	36%	<b>16%</b>	24%	0%
Opposition from neighbors	<b>40%</b>	19%	28%	<b>71%</b>	70%	73%	<b>40%</b>	41%	38%
Permit fees	<b>20%</b>	8%	13%	<b>16%</b>	15%	18%	<b>12%</b>	6%	22%
General uncertainty in the land use entitlement process	<b>13%</b>	11%	12%	<b>16%</b>	15%	18%	<b>23%</b>	18%	33%
Length of time it takes to process land use entitlements	<b>18%</b>	6%	11%	<b>13%</b>	20%	0%	<b>20%</b>	19%	22%
Length of time to process building permits	<b>N/A</b>	N/A	N/A	<b>13%</b>	15%	9%	<b>8%</b>	12%	0%

Top 3 Barriers (Higher %)	2017			2018			2019		
Bottom 3(Lower %)	n=115	n=12	n=103	n=31	n=16	n=15	n=26	n=13	n=13
	All Cities	Over 25K	Under 25K	All Cities	Over 25K	Under 25K	All Cities	Over 25K	Under 25K
Infrastructure as a Barrier (Q12)	<b>53%</b>	25%	56%	<b>N/A</b>	N/A	N/A	<b>N/A</b>	N/A	N/A
Funding	<b>90%</b>	88%	90%	<b>69%</b>	75%	63%	<b>69%</b>	62%	77%
Long-range planning/master plans	<b>37%</b>	14%	39%	<b>N/A</b>	N/A	N/A	<b>N/A</b>	N/A	N/A
Capital improvement planning	<b>47%</b>	14%	49%	<b>84%</b>	73%	94%	<b>92%</b>	92%	92%
Environmental review	<b>40%</b>	14%	43%	<b>39%</b>	33%	44%	<b>27%</b>	38%	15%
Local approval and adoption	<b>22%</b>	13%	23%	<b>26%</b>	33%	19%	<b>42%</b>	62%	23%
Physical constraints (e.g. topography, wetlands, etc.)	<b>49%</b>	63%	48%	<b>13%</b>	13%	13%	<b>15%</b>	8%	23%
Coordination with state agencies	<b>34%</b>	17%	36%	<b>52%</b>	60%	44%	<b>46%</b>	54%	38%
Regulations (e.g., TPR, etc)	<b>41%</b>	43%	41%	<b>26%</b>	27%	25%	<b>38%</b>	46%	31%
Rate of growth in community (e.g., can't keep up)	<b>23%</b>	29%	22%	<b>39%</b>	40%	38%	<b>35%</b>	38%	31%
Water capacity constraints (e.g., water treatment facility is insufficient, needs upgrades, or additional capital improvement)	<b>N/A</b>	N/A	N/A	<b>19%</b>	20%	19%	<b>27%</b>	15%	38%
Sewer capacity constraints (e.g., sewer treatment facility is insufficient, needs upgrades, or additional capital improvements)	<b>N/A</b>	N/A	N/A	<b>23%</b>	20%	25%	<b>23%</b>	23%	23%

Exhibit C.4 Barriers by Category and Region 2017-2019 surveys

	2017			2018			2019		
	All cities	WV+ Metro	Rest of State	All cities	WV+ Metro	Rest of State	All cities	WV+ Metro	Rest of State
	<b>n=111</b>	n=47	n=64	<b>n=31</b>	n=20	n=11	<b>n=26</b>	n=17	n=9
Infrastructure as a Barrier (Q12)	<b>53%</b>	43%	60%	<b>N/A</b>	N/A	N/A	<b>N/A</b>	N/A	N/A
Funding	<b>90%</b>	85%	94%	<b>69%</b>	64%	71%	<b>69%</b>	78%	65%
Long-range planning/master plans	<b>37%</b>	29%	42%	<b>N/A</b>	N/A	N/A	<b>N/A</b>	N/A	N/A
Capital improvement planning	<b>47%</b>	30%	59%	<b>84%</b>	82%	85%	<b>92%</b>	89%	94%
Environmental review	<b>40%</b>	32%	46%	<b>39%</b>	55%	30%	<b>27%</b>	22%	29%
Local approval and adoption	<b>22%</b>	16%	27%	<b>26%</b>	27%	25%	<b>42%</b>	67%	29%
Physical constraints (e.g. topography, wetlands, etc.)	<b>49%</b>	44%	54%	<b>13%</b>	18%	10%	<b>15%</b>	22%	12%
Coordination with state agencies	<b>34%</b>	39%	31%	<b>52%</b>	55%	50%	<b>46%</b>	67%	35%
Regulations (e.g., TPR, etc)	<b>41%</b>	44%	38%	<b>26%</b>	18%	30%	<b>38%</b>	33%	41%
Rate of growth in community (e.g., can't keep up)	<b>23%</b>	19%	25%	<b>39%</b>	27%	45%	<b>35%</b>	33%	35%
Water capacity constraints (e.g., water treatment facility is insufficient, needs upgrades, or additional capital improvement)	<b>N/A</b>	N/A	N/A	<b>19%</b>	18%	20%	<b>27%</b>	22%	29%
Sewer capacity constraints (e.g., sewer treatment facility is insufficient, needs upgrades, or additional capital improvements)	<b>N/A</b>	N/A	N/A	<b>23%</b>	18%	25%	<b>23%</b>	22%	24%

# Section D: Content Analysis

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## Purpose

In this section we examine recent city-level Housing Needs Analyses (HNAs) or Housing Capacity Analyses (HCAs) and Consolidated Plans to understand documented barriers to market-rate and affordable housing in cities with recently adopted HNAs and/or in HUD entitled communities.

Barriers found in these plans and analyses will be compared with the literature to have a contextualized understanding of housing demand, construction factors, land supply, public process, and the variability of affordable v. market rate housing across city size and region.

## Policy Framework

*Housing Needs Analyses* (HNAs) are required for cities in Oregon. Under the Statewide Planning Goal 10: Housing, housing supply and need is evaluated under the pretense that housing is an extremely important investment towards a thriving community. A HNA is a product and a process of a city's determined need based around their current housing inventory. HNAs provide a cross reference of whether the 20-year supply of land determined with the UGB is sufficient to accommodate housing.<sup>2</sup> HNAs are required to be updated every 6 years if cities reside in a metropolitan service district, and every 8 years if not (in accordance with edits made to HB 2003 published in 2019). This amendment requires all cities with populations over 10,000 to update their HNAs on this time schedule.<sup>3</sup> HNAs are a requirement for Goal 10, which is interpreted through stats on available land provided by each city.<sup>4</sup> House Bill 2003 provided DLCD with \$1 million to update and implement HNAs in Oregon Cities that need financial assistance.<sup>5</sup>

*Consolidated Plans* are a HUD-required assessment dedicated to affordable housing and community development needs through the lens of market conditions. These plans determine which federal CPD formula block grant programs (CDBG, HOME, HTF, ESG, HOPWA) require further investment and jurisdiction based on development needs. Consolidated plans are provided through Annual Action Plans by city which concisely summarize what federal and non-federal resources will be prioritized each year. Consolidated plans are used as guidance for Annual Action Plans to carry out specific goals on a succinct timeline. Progress and accomplishments toward the Consolidated Plan are published in the Consolidated

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<sup>2</sup> Department of Land Conservation and Development. "Goal 10: Housing," n.d. <https://www.oregon.gov/lcd/OP/Pages/Goal-10.aspx>.

<sup>3</sup> Stuckmayer, Ethan, and Samuel Garcia. "Memo: HB 2003 Revised HNA Schedule." DLCD, August 26, 2021. [https://www.oregon.gov/lcd/UP/Documents/HB2003\\_HNA\\_Adoption\\_Schedule.pdf](https://www.oregon.gov/lcd/UP/Documents/HB2003_HNA_Adoption_Schedule.pdf).

<sup>4</sup> Oregon Secretary of State. "Interpretation of Goal 10 Housing," December 22, 2020. <https://secure.sos.state.or.us/oard/displayDivisionRules.action?selectedDivision=3058>.

<sup>5</sup> DLCD. "Key Elements of House Bill 2003 (Housing Needs)," November 6, 2019. <https://www.oregon.gov/lcd/UP/Documents/HB2003TechnicalOverview.pdf>.

Annual Performance and Evaluation Report (CAPER).<sup>6</sup> Consolidated Plans updates are required every five years to cover 4 years of planning. The current timeline for Consolidated Plans is from 2021–2025, previously 2016–2020.<sup>7</sup>

## Methods

### Selecting Case Studies

We selected 33 HNAs from all over the state. Cities were selected for their varying ranges in population, land supply, and demographics. They were selected from a range of locations. Ideally, HNAs were included only if they were published within the last three years. Some cities, like Portland, have not publicly published their most up to date HNA so earlier versions of their HNA were reviewed. The oldest HNA found was from 2011 (Portland) while the more recent HNAs are from 2019–2021.

The U.S. Department of Housing and Urban Development (HUD) requires so-called “entitlement” areas to prepare consolidated plans. Entitlement areas include the central cities of Metropolitan Statistical Areas (MSAs), other metropolitan cities with populations of at least 50,000, and qualified urban counties with populations of at least 200,000. We analyzed Consolidated Plans from 9 cities and 2 counties (which are all of the entitlement areas in Oregon). Only cities and counties with intentions (and eligibility) of receiving grants are required by HUD to produce Consolidated Plans.

### Document Collection

We searched city websites and city planning department webpages for any HNAs and consolidated plans. We located some documents through academic databases found through University of Oregon’s online libraries. The specific libraries we utilized are the “Local and Regional Documents Archive”<sup>8</sup> and the “Data for Local Communities.”<sup>9</sup> DLCD provided some data for plans. We used the HUD Exchange database to obtain consolidated plans.

## Methods

### HNAs

We searched HNAs for the five categories of barriers articulated in the Summary Report: 1-Supply of Buildable Land; 2-Factor Costs; 3-Industry Structure; 4-Demand Side; 5-Process). In HNAs, the barriers are not clearly articulated in a separate section like in the consolidated plans but there are more examples of specific barriers throughout the documents. This is in part because Goal 10 and its administrative rules do not include a requirement that HNAs document barriers. To understand some of the main barriers, we read the conclusions and recommendations located at the end of the HNA first. These bullets have the main points for what needs to be done to increase certain types of housing in each city. We skimmed the

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<sup>6</sup>Housing Development. “Consolidated Plan,” n.d. <https://www.oregon.gov/ohcs/development/Pages/consolidated-plan.aspx>.

<sup>7</sup>Guidance to Public Housing Authorities & Continuums of Care Certifying That Their Plans Are Consistent with the State Consolidated Plan.” Oregon Housing and Community Services, n.d. <https://www.oregon.gov/ohcs/development/Documents/conplan/Guidance-Document.pdf>.

<sup>8</sup><https://scholarsbank.uoregon.edu/xmlui/handle/1794/7549>

<sup>9</sup><https://scholarsbank.uoregon.edu/xmlui/handle/1794/13662>

documents thoroughly, focusing on sections on land use, demographics, and costs to search for mentions of barriers throughout the document. When a document includes a barrier, we consolidated the language to reflect the coded excel categories and recorded the page numbers to assist in further review. Each statement about a barrier was catalogued under each category with Excel.

## Consolidated Plans

When assessing and reviewing the consolidated plans, we looked for the five categories of barriers. Initially, keywords were searched for like *barrier*, *affordable housing*, *impediment*, *difficulty*, *development*, *lack*, and *zoning*. Many consolidated plans have sections labelled as “Barriers to Affordable Housing” with lists of barriers readily available. In other plans, the discussion of barriers was scattered throughout the document, so we used keywords to search for barriers. Utilizing the assigned categories of “Supply of Buildable Land,” “Factor Costs,” “Building Industry Structure,” “Demand Side,” and “Public Process,” sections of consolidated plans by city are organized. We sorted findings that could not easily be categorized into these 5 categories into a sixth, “Uncategorized” category. Each statement about a barrier was catalogued under each category with Excel (with the page numbers assigned for easy review).

## Results

**Table D.1: HNAs Organized by Category, High to Low Frequency, Dated from 2011–2021, n=33**

Category 1: Supply of buildable land	Frequency	%
zoning -ADUs or missing middle	17	52%
zoning - multifamily	14	42%
zoning - commercial	10	30%
land supply (including UGB)	10	30%
zoning - density	6	18%
zoning	5	15%
Physical constraint - steep slopes	4	12%
zoning - mobile homes	4	12%
zoning - single family	4	12%
zoning - height max	4	12%
cost of land	3	9%
undevelopable vacant land	3	9%
Physical constraint -floodplains	2	6%
public services (infrastructure)	2	6%
physical constraints	1	3%
SDCs	1	3%
public process/ opposition	1	3%
Buildable land	1	3%
Supply of buildable land -> cost of land	0	0%
service/tax policy	0	0%
parcelization	0	0%
building codes	0	0%
Other policies	0	0%

<b>Category 2: Other Factors/ Construction Costs</b>	<b>Frequency</b>	<b>%</b>
Labor	1	3%
Financing (federal funding especially)	1	3%
Other Factor costs -> construction cost	0	0%
Materials	0	0%
<b>Category 3: Industry Structure -&gt; construction cost</b>	<b>Frequency</b>	<b>%</b>
developers not building supply needed	7	21%
not enough construction workers	1	3%
Industry Structure -> construction cost	0	0%
size of builders	0	0%
number of builders	0	0%
<b>Category 4: Demand side -&gt; cost of land</b>	<b>Frequency</b>	<b>%</b>
population/employment growth	20	61%
housing preferences - demographics/SE	19	58%
changes in real income	5	15%
Demand side -> cost of land	1	3%
rate of household formation	1	3%
national economic factors	0	0%
<b>Category 5: Process</b>	<b>Frequency</b>	<b>%</b>
permit timeline (120 days)	3	9%
cost of permits	2	6%
political will	2	6%
Process	0	0%
YIMBY/NIMBY	0	0%
by right v. at will	0	0%
existing supply	7	21%
cost of homeownership	5	15%
displacement and redevelopment	3	9%
too much vacant housing	2	6%
affordable homes for ownership in region	2	6%
building conditions	1	3%

Source: HNAs

Table D.2: Most Frequently Found Barriers in HNAs Across All Categories, Dated from 2011-2021, n=33

		Frequency	Percent with
Cat 4	population/employment growth	20	61%
Cat 4	housing preferences - demographics/SE	19	58%
Cat 1	zoning -ADUs or missing middle	17	52%
Cat 1	zoning - multifamily	14	42%
Cat 1	zoning - commercial	10	30%
Cat 1	land supply (including UGB)	10	30%
Cat 3	developers not building supply needed	7	21%
Cat 4	existing supply	7	21%
Cat 1	zoning - density	6	18%
Cat 1	zoning	5	15%

Source: HNAs

## Summary Frequency Tables for Consolidated Plans by Category

Table D.3: Consolidated Plans Organized by Category, High to Low Frequency, Dated from 2016-2020, n=11

<b>Category 1: Supply of buildable land -&gt; cost of land</b>	<b>Frequency</b>	<b>%</b>
physical constraints	8	73%
zoning	5	45%
building codes	3	27%
public process/ opposition	3	27%
parcelization	2	18%
Other policies	2	18%
service/tax policy	1	9%
public services (infrastructure)	0	0%
<b>Category 2: Other Factors/ Construction Costs</b>	<b>Frequency</b>	<b>%</b>
Financing (federal funding especially)	9	82%
Materials	2	18%
Labor	1	9%
<b>Category 3: Industry Structure -&gt; construction cost</b>	<b>Frequency</b>	<b>%</b>
number of builders	1	9%
size of builders	0	0%
<b>Category 4: Demand side -&gt; cost of land</b>	<b>Frequency</b>	<b>%</b>
housing preference- demographics/SE	6	55%
national economic factors	4	36%
rate of household formation	2	18%
population/employment growth	1	9%
changes in real income	0	0%
<b>Category 5: Process</b>	<b>Frequency</b>	<b>%</b>
political will	2	18%
permit timeline (120 days)	1	9%
YIMBY/NIMBY	1	9%
cost of permits	0	0%
by right v. at will	0	0%
<b>Uncategorized</b>	<b>Frequency</b>	<b>%</b>
Lack of elderly and special needs specific housing	3	27%
Multiple reporting requirements (adds to costs)	2	18%
Low vacancy rates in existing housing	1	9%
Federal programs not in alignment	1	9%
Multi-family housing extra requirements	1	9%
Lack of investment in LIHTC & lack of alternatives	1	9%
lack of robust protections for renters	1	9%
Lack of service-based housing	0	0%

Source: Consolidated Plans

**Table D.4: Most Frequently Found Barriers in Consolidated Plans Across All Categories, Dated from 2016-2020, n=11**

Category	Barrier	Frequency	%
Cat 2	Financing (federal funding especially)	9	82%
Cat 1	physical constraints	8	73%
Cat 4	housing preferences – demographics/socioeconomic	6	55%
Cat 1	zoning	5	45%
Cat 4	national economic factors	4	36%
Cat 1	building codes	3	27%
Cat 1	public process/ opposition	3	27%
Uncategorized	Lack of elderly and special needs specific housing	3	27%
Cat 1	parcelization	2	18%
Cat 1	Other policies (Priorities for funding)	2	18%

Source: Consolidated Plans

Population and County Distribution

**Table D.5: HNAs Population Distribution**

Population Class	Cities	Reviewed	% Reviewed
>1,000	80	2	3%
1,000-4,999	85	4	5%
5,000-9,999	26	3	12%
10,000-24,999	27	12	44%
25,000-49,999	11	6	55%
>50,000	12	6	50%
<b>Total</b>	<b>241</b>	<b>33</b>	<b>14%</b>

Source: City Descriptors Excel Sheet

**Table D.6: Consolidated Plans Population Distribution**

Population Class	Cities	Reviewed	% Reviewed
>1,000	80	0	0%
1,000-4,999	85	0	0%
5,000-9,999	26	0	0%
10,000-24,999	27	0	0%
25,000-49,999	11	2	18%
>50,000	12	8	67%
<b>Total</b>	<b>241</b>	<b>10</b>	<b>4%</b>

Source: City Descriptors Excel Sheet

**Table D.7: HNAs Regional Distribution of Cities (Percent Reviewed)**

Region	Cities	Reviewed	% Reviewed
Central Oregon	16	2	13%
Greater Eastern	19	0	0%
Northeast Oregon	56	1	2%
Portland Metro	24	12	50%
South Coastal Oregon	13	1	8%
Southeast Oregon	14	3	21%
Southern Oregon	24	6	25%
Willamette Valley	75	8	11%
<b>Total</b>	<b>241</b>	<b>33</b>	<b>14%</b>

Source: City Descriptors

**Table D.8: Consolidated Plans Regional Distribution of Cities (Percent Reviewed)**

Region	Cities	Reviewed	% Reviewed
Central Oregon	16	2	13%

Greater Eastern	19	0	0%
Northeast Oregon	56	0	0%
Portland Metro	24	2	8%
South Coastal Oregon	13	0	0%
Southeast Oregon	14	0	0%
Southern Oregon	24	0	0%
Willamette Valley	75	6	8%
<b>Total</b>	<b>241</b>	<b>10</b>	<b>4%</b>

Source: City Descriptors Excel Sheet

## Discussion

When comparing consolidated plans and HNAs' most frequently found barriers, the most frequent category mentioned in both plans emerge from Category 1 (Supply of Buildable Land / Cost of Land). Zoning, in general, continues to prevent the type of affordable housing that is consistently needed. This need for areas zoned for different types of housing in certain cities relates to the type of demand that is required in each city. Many populations are changing demographically, either with growing families or aging Baby Boomers. These populations are requiring more affordable and accessible living situations that most cities have been lacking in. HNAs and Consolidated plans report lack of zoning (duplexes and single-family attached) for middle housing is preventing many young families from becoming homeowners while missing multifamily housing close to amenities is lacking for older populations.

Consolidated plans reflect the overall need for a different supply of housing for changing populations' demand. The differences seen between consolidated plans and HNAs are seen in the economic factors that affect financing for affordable housing. Lack of federal funding for affordable housing limits production of affordable housing.

For HNAs, the most common barriers include land zoned for needed housing types. Additionally, there is limited access to housing need that is desirable and affordable. This is influenced by developers not building the supply of housing that demographically is needed. Additionally, UGB limits were noted in some cities as a barrier to land supply.

Cities that are experiencing increases in population growth also have high rates of demographic changes and changing housing preferences emerged as a demand barrier in places like Portland (and surrounding suburbs), Salem, Roseburg, North Plains, and more. These cities tend to be larger cities to begin with or suburb/close by towns around denser areas. Eleven out of 18 cities reported population growth in conjunction with changing housing demographics. Cities that experience a decline in population also have older populations. Cities with walkable commercial zones also veer toward wanting a change in zoning as related towards increasing density in non-housing zones. This is true in cities like Ashland who highlight that "Increasing the prevalence of mixed-use developments (beyond the 50% expectation) will effectively increase the net supply of land and the total capacity for multi-family units."<sup>10</sup>

<sup>10</sup> "Ashland HNA," 2012. P. 8 [https://www.ashland.or.us/SIB/files/Adopted\\_2012-2040\\_HNA.pdf](https://www.ashland.or.us/SIB/files/Adopted_2012-2040_HNA.pdf).

Overall, more inclusive zoning (housing development that is expanded beyond single family zoning that is also affordable) is desired across all cities, regardless of population size. Cities across Oregon are increasing in population and require more varied options for density, affordability, and amenities. Zoning barriers, financial barriers, and public process barriers are the most common barriers described in HNAs across the state.

# Section E: Multistakeholder Survey

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## Methods

IPRE recruited participants representing the public sector, private sector, and nonprofit sector across the state of Oregon. IPRE distributed through email lists provided by the Oregon City Planning Directors Association, Association of Oregon Counties Planning Directors, Network for Oregon Affordable Housing, and League of Oregon Cities. The Oregon Homebuilders Association and Housing Oregon sent the survey to their membership lists directly. Additionally, the University of Oregon team gleaned a list of contacts from HUD Consolidated Plans to distribute the survey to city staff working in affordable housing. The Barriers to Housing Production Technical Report will further describe survey recruitment methods. Our survey was distributed under an Institutional Review Board exemption in which survey respondents provided consent to participate in the survey on the basis that personally identifiable information would not be shared.

To understand perspectives on barriers to housing production, we developed and administered an online survey to selected stakeholder groups. The survey was administered online in April and May of 2022 using a mixed mode approach. For local government and nonprofit organizations, we administered the survey by sending individualized email solicitations. We partnered with the Oregon Association of Homebuilders who emailed their members through their distribution lists. Because our methodology targeted specific stakeholders, we present the number of respondents rather than response rates.

We did not require respondents to answer all questions (sometimes called forced response) so not all survey participants answered every question. To better communicate the size of the respondent pool for each question we present the number of respondents (n) along with the summary data in the tables and charts that follow.

## Summary of Responses by Sector, City Size, and Region

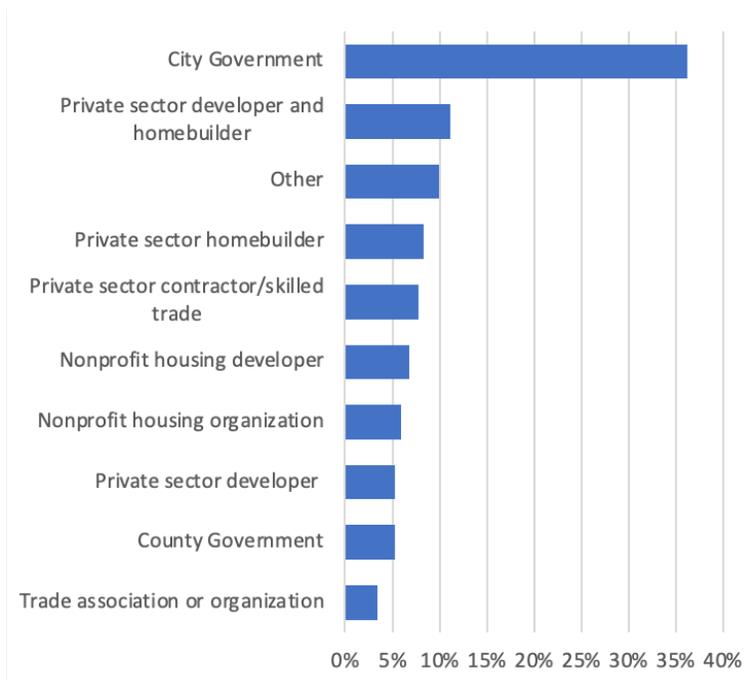
We targeted (1) local government staff (primarily planners, but other staff in cities that do not have planning staff), (2) for-profit housing developers, and (3) non-profit housing developers. A total of 323 individuals participated in the survey; 134 government representatives (41% of respondents), 105 private sector developers (33%), 52 nonprofit housing developers (16%) and 32 that could not be categorized in the three primary groups (10%).

### Exhibit E.1. Responses by Stakeholder Group

Stakeholder	Number of Responses	Percent of Responses
<b>Government</b>	<b>134</b>	<b>41%</b>
<b>Private Sector</b>	<b>105</b>	<b>33%</b>
<b>Nonprofit</b>	<b>52</b>	<b>16%</b>
<b>Other</b>	<b>32</b>	<b>10%</b>
<b>Total</b>	<b>323</b>	<b>100%</b>

Exhibit E.2 shows a more detailed breakdown of respondents by type. The largest respondent group was city government (117 responses or 36% of responses). This includes planners, city managers, housing specialists and others who represent local government.

Figure E.2. Survey Responses by Type of Respondent.



Most respondents (61%) indicated that they worked primarily at the city level. About 16% indicated county as the primary geographic region they worked in. The remaining 23% worked at the regional or state level.

Many private sector and some nonprofit respondents work across many cities and regions. As a result, it is difficult to analyze respondent shares by city or region for private and nonprofit respondents. We present response rates for city size and region for public sector respondents. Exhibit E.3 conveys the number of cities who responded by city size. As shown, 46 percent of all cities responded to the survey with over half of cities between 5,000–25,000 and over 80 percent of large cities responding. Only 29 percent of cities under 1,000 responded. In considering how much of the state is represented in these responses, over 74 percent of the state’s population in cities is represented by our survey responses.

Exhibit E.3: City Response Rates by Size, UO IPRE Barriers to Housing Production Survey, 2022

Population Class	Cities	Completes	Percent
<1,000	80	23	29%
1,000-4,999	85	39	46%
5,000-9,999	26	17	65%
10,000-24,999	27	17	63%
25,000-49,999	11	5	45%
>50,000	12	10	83%
<b>Total</b>	<b>241</b>	<b>111</b>	<b>46%</b>

We also examined response rates above and below the 10,000 threshold. Of the 191 cities under 10,000, 41 percent responded. Of the 50 cities over 10,000, 64 percent responded.

Exhibit E.4: City Response Rates by Size, UO IPRE Barriers to Housing Production Survey, 2022

Population Size	Cities	Completes	Percent
Less than 10,000	191	79	41%
Greater than 10,000	50	32	64%
<b>Total</b>	<b>241</b>	<b>111</b>	<b>46%</b>

Using DLCD Regions, we examined response rate for both counties and cities by region. Exhibit E.5 shows response rates by region for city respondents. Response rates varied from 38 percent to 69 percent within regions with Central Oregon recording the greatest share of responses while only 38 percent of South Coast cities responded.

**Exhibit E.5: City Response Rates by Region, UO IPRE Barriers to Housing Production Survey, 2022**

<b>Region</b>	<b>Cities</b>	<b>Completes</b>	<b>Percent</b>
Central Oregon	16	11	69%
North Coastal Oregon	19	9	47%
Northeast Oregon	56	23	41%
Portland Metro	24	10	42%
South Coastal Oregon	13	5	38%
Southeast Oregon	14	6	43%
Southern Oregon	24	14	58%
Willamette Valley	75	33	44%
<b>Total</b>	<b>241</b>	<b>111</b>	<b>46%</b>

Exhibit E.6 shows response rates by region. While 16 of 36 counties responded, the response rates varied tremendously by region. Over 78 percent of Northeast Oregon counties responded, but no counties from Portland Metro or Southern Oregon responded to the survey.

**Exhibit E.6: County Response Rates by Region, UO IPRE Barriers to Housing Production Survey, 2022**

<b>Region</b>	<b>Counties</b>	<b>Completes</b>	<b>Percent</b>
Central Oregon	5	3	60%
North Coastal Oregon	3	1	33%
Northeast Oregon	9	7	78%
Portland Metro	3		0%
South Coastal Oregon	2	1	50%
Southeast Oregon	4	1	25%
Southern Oregon	3		0%
Willamette Valley	7	3	43%
<b>Total</b>	<b>36</b>	<b>16</b>	<b>44%</b>

## Survey Instrument

UO IPRE - DLCDC Housing Production Survey - 2022

Q1: Intro

Thank you for participating in Barriers to Housing Production survey. You are being asked to participate in a research study. Under a contract from the Department of Land Conservation and Development, we are studying impediments to housing production in Oregon. In this survey, you will be asked to offer your perceptions related to local and state regulations, infrastructure policy, development industry, and public process. This work will inform the tasks of the Regional Housing Needs Analysis Working Group.

The questionnaire should take you about 20 minutes to complete. Please complete the survey to the best of your ability as the more data we have the more robust the results.

This survey was developed by a team of researchers at the University of Oregon. Your answers are and will be completely confidential. Any personally identifying information will not be tied to any product this research produces. We will not share or sell your personally identifying information. By completing and submitting this survey you provide consent in allowing the UO research team to use these findings for research. You may choose not to participate in this survey without penalty.

At the end of the survey, you will be given the option to indicate if you are willing to participate in a follow-up interview. If you are willing to participate in a follow-up interview, you will be asked to provide your name, phone number, organization, and e-mail address so that we can get in touch with you to conduct an interview.

If you have any questions regarding the survey, please email Rebecca Lewis or Robert Parker at the University of Oregon School of Planning, Public Policy and Management: [rlewis9@uoregon.edu](mailto:rlewis9@uoregon.edu) and [rgp@uoregon.edu](mailto:rgp@uoregon.edu). You can contact Rebecca Lewis by phone at 541-346-4432.

Q2: Do you consent to taking this survey? By checking "yes," you agree to take this survey. Checking "no" will end survey.

- Yes
- No

Q3: Please indicate the type of organization that best fits you:

- City Government
- County Government
- Private sector developer (e.g. creating subdivisions, master planned developments, etc.)
- Private sector homebuilder
- Private sector developer and homebuilder
- Private sector contractor/skilled trade
- Nonprofit housing developer
- Trade association or organization
- Nonprofit housing organization
- Other (please specify) \_\_\_\_\_

**First, we want to ask some questions about your general knowledge and perceptions of housing issues in Oregon.**

Q5: Please indicate the extent to which you feel knowledgeable about housing issues in the community or the communities you work in.

- Not at all knowledgeable
- A little knowledgeable
- Somewhat knowledgeable
- Very knowledgeable
- Extremely knowledgeable

Q6: Please indicate the extent to which you perceive housing production to be important relative to other issues in your community or the communities you work in.

- Much less important
- Less important
- About the same importance
- More important
- Much more important

The next section will ask you to describe your perceptions about barriers to housing production in Oregon. By housing production we mean all of the steps that go into creating new housing units of any type.

Q8: (Only Public) What City or County do you work for? (please list only one; if you work for more than one, list the largest)

\_\_\_\_\_

Q9: (Only Non-Public) In this series of questions we will ask about barriers to housing production which may vary by city and region. Your organization may work in multiple communities. For the purposes of the next series of questions, we ask that you identify the city that you've worked in most frequently (built the most units) in the last 5 years. What community will you use to inform these questions?

\_\_\_\_\_

Q10: In your view, what are the three **most important barriers** to housing production in Oregon.

- Barrier 1 \_\_\_\_\_
- Barrier 2 \_\_\_\_\_
- Barrier 3 \_\_\_\_\_

For the purpose of this study we use the term "barriers" to mean anything that is an impediment to housing production. Impediments could be in the following categories:

- Land supply and land regulation
- Infrastructure availability, development, and finance
- Cost factors (e.g., materials, labor, financing, etc) Industry structure and regulation.
- Demand
- Public process and engagement

We are aware that other barriers may exist in categories not listed above. We include many detailed statements that may be unfamiliar to many respondents. We've included a 'don't know' option on the barrier questions and encourage you to select that option if you do not feel you can make an informed assessment.

Q12: Please indicate the extent to which you perceive **land and land regulation** are or are not barriers to housing production in your community:

	Not a barrier	Minor barrier	Moderate barrier	Extreme barrier	Don't Know
Lack of available vacant buildable lots (e.g. for sale or owned by builders)	<input type="checkbox"/>				
Lack of larger (5+ acre) development ready tracts	<input type="checkbox"/>				
Inability to bring land to a development ready state (e.g. bringing tract land to serviced lots ready for development)	<input type="checkbox"/>				
High cost of land	<input type="checkbox"/>				
Physically constrained lands (e.g wetlands, steep slopes, etc.)	<input type="checkbox"/>				
Wetland requirements	<input type="checkbox"/>				
Other environmental review (e.g. riparian areas, etc.)	<input type="checkbox"/>				
Not enough land zoned for single-unit housing	<input type="checkbox"/>				
Not enough land zoned for multi-unit housing	<input type="checkbox"/>				
Other zoning restrictions (e.g. lot size, minimum density requirements)	<input type="checkbox"/>				
Parking Requirements	<input type="checkbox"/>				
State Building Code Requirements	<input type="checkbox"/>				
Right of Way dedication and frontage improvement requirements	<input type="checkbox"/>				
Other public facility requirements (e.g. stormwater mitigation)	<input type="checkbox"/>				
Other requirements associated with bringing land to a development-ready state (e.g. subdivision conditions of approval)	<input type="checkbox"/>				

**Q13: Please indicate the extent to which you perceive infrastructure financing and regulations are or are not barriers to housing production in your community:**

	Not a barrier	Minor barrier	Moderate barrier	Extreme barrier	Don't Know
City System Development Charges (SDCs)	<input type="checkbox"/>				
Other SDCs (e.g. Special Districts)	<input type="checkbox"/>				
Funding to finance infrastructure improvements	<input type="checkbox"/>				
Prioritizing projects Capital Improvement Plans	<input type="checkbox"/>				
Coordination with state agencies on infrastructure development	<input type="checkbox"/>				
Regulations governing infrastructure development	<input type="checkbox"/>				
Transportation system-related improvements (e.g. intersection/collector/arterial improvements)	<input type="checkbox"/>				

**Q14: Please indicate the extent to which you perceive cost and financing factors are or are not barriers to housing production in your community:**

	Not a barrier	Minor barrier	Moderate barrier	Extreme barrier	Don't know
High construction Costs (materials)	<input type="checkbox"/>				
High construction Costs (labor)	<input type="checkbox"/>				
Lack of financing for land development (e.g., subdivision improvements)	<input type="checkbox"/>				
Lack of financing for housing construction	<input type="checkbox"/>				
Lack of financing for single-unit housing	<input type="checkbox"/>				
Lack of financing for multi-unit housing	<input type="checkbox"/>				
Lack of financing for manufactured housing	<input type="checkbox"/>				
Lack of financing for missing middle housing	<input type="checkbox"/>				

Q15: Please indicate the extent to which you perceive **housing industry factors** are or are not barriers to housing production in your community:

	Not a barrier	Minor barrier	Moderate barrier	Extreme barrier	Don't know
Developers are not building enough housing that is needed and affordable	<input type="checkbox"/>				
Developers are not building the types of housing needed for different household compositions and incomes	<input type="checkbox"/>				
Not enough housing developers	<input type="checkbox"/>				
Not enough housing developers building at a small scale (	<input type="checkbox"/>				
Not enough housing developers building at a large scale (10 or more units per development)	<input type="checkbox"/>				
Not enough housing developers focused on infill development	<input type="checkbox"/>				
Not enough housing developers focused on greenfield development	<input type="checkbox"/>				
High cost/limited supply of construction workers, generally	<input type="checkbox"/>				
High cost/limited supply of skilled labor (e.g. licensed tradespersons)	<input type="checkbox"/>				
Insufficient workers in skilled trades	<input type="checkbox"/>				
Not enough workers for other jobs	<input type="checkbox"/>				
Lack of quality developers/builders	<input type="checkbox"/>				
Lack of contractor capacity	<input type="checkbox"/>				

Q16: Please indicate the extent to which you perceive **housing demand factors** are or are not barriers to housing production in your community:

	Not a barrier	Minor barrier	Moderate barrier	Extreme barrier	Don't know
Lack of market demand for single unit housing	<input type="checkbox"/>				
Lack of market demand for multi-unit housing	<input type="checkbox"/>				
Lack of market demand for manufactured housing	<input type="checkbox"/>				
Community experiencing population loss	<input type="checkbox"/>				
Development not keeping pace with population growth	<input type="checkbox"/>				
Demand for second homes	<input type="checkbox"/>				
Demand for short-term rentals	<input type="checkbox"/>				
Limited ability for low and moderate income to compete in the market	<input type="checkbox"/>				
Demand from high income households	<input type="checkbox"/>				

Q17: Please indicate the extent to which you perceive **public processes and permitting** are or are not barriers to housing production in your community:

	Not a barrier	Minor barrier	Moderate barrier	Extreme barrier	Don't know
Lack of political will from elected officials	<input type="checkbox"/>				
Opposition from neighbors	<input type="checkbox"/>				
Length of time it takes to process land use entitlements	<input type="checkbox"/>				
Length of time to process building permits	<input type="checkbox"/>				
Permit fees	<input type="checkbox"/>				
Permit requirements	<input type="checkbox"/>				
Cost of SDCs	<input type="checkbox"/>				
Public hearings in the land use process	<input type="checkbox"/>				
General uncertainty in the land use entitlement process	<input type="checkbox"/>				
Impact of building codes on use of innovative construction techniques (e.g., 3D printed units, modular units, cross-laminated timber or mass timber, etc)	<input type="checkbox"/>				

**Q18 (Nonprofit only):** Please indicate the extent to which you perceive issues specific to **government assisted housing** are or are not barriers to housing production in your community:

	Not a barrier	Minor barrier	Moderate barrier	Extreme barrier	Don't know
Amount of grant funding available for projects	<input type="checkbox"/>				
Timing of grant funding for projects	<input type="checkbox"/>				
Process of applying for grant funding	<input type="checkbox"/>				
Assembling capital stacks for projects	<input type="checkbox"/>				
Complexity of applying for grant funding	<input type="checkbox"/>				
Cost of applying for grant funding	<input type="checkbox"/>				
Limited opportunities to apply for grant funding	<input type="checkbox"/>				
Time elapsed from applying for grant funding and receiving funding	<input type="checkbox"/>				
Interest rates	<input type="checkbox"/>				
Inflation	<input type="checkbox"/>				
Construction standards for government-assisted housing	<input type="checkbox"/>				
Cost of Labor	<input type="checkbox"/>				

**Q19:** Are there any barriers not listed in this section we should be aware of? You can use the <<Back button to look through the lists if necessary. Following are the categories of barriers:

- Land supply and land regulation
- Infrastructure availability, development, and finance
- Cost factors (e.g., materials, labor, financing, etc)
- Industry structure and regulation
- Demand
- Public process and engagement

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Q20: Of the barriers above perceived in any of the categories as "extreme barriers," which three are the **most severe** barriers to housing production in the community in which you work?

- Barrier 1 \_\_\_\_\_
- Barrier 2 \_\_\_\_\_
- Barrier 3 \_\_\_\_\_

Q21: One issue that emerged from our previous research was the difficulty in bringing infrastructure (e.g. water, sewer, etc.) to residential land already within the UGB, thereby making it "development ready." To what extent would you rate this as a barrier in your community?

- Not a barrier
- Minor barrier
- Moderate barrier
- Extreme barrier
- Don't know

Q22: Provide more detail on your responses concerning land and infrastructure in the space below.

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Q23: To what extent do you agree or disagree that the zoning regulations in the community you work in have "clear and objective" standards as required by state statute? The definition of clear and objective is provided below.

*Definition: (1) Except as provided in section (2) of this rule, a local government may adopt and apply only clear and objective standards, conditions and procedures regulating the development of housing, including needed housing. The standards, conditions and procedures may not have the effect, either in themselves or cumulatively, of discouraging needed housing through unreasonable cost or delay.*

- Strongly disagree
- Somewhat disagree
- Neither agree nor disagree
- Somewhat agree
- Strongly agree
- Don't know

Q24: Oregon has a well-documented housing affordability crisis. Our research shows that most housing developers build larger and more expensive units regardless of unit type. In your view what are the biggest barriers to the private sector in building lower cost housing? Please be as specific and detailed as possible.

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Q25 (Public only): What best describes your role in the community?

- City Administrator/City Manager
- Planning Director
- Staff Planner
- Staff specifically focused on housing issues
- Contract Planner or Contract City Manager/Administrator
- Other \_\_\_\_\_

Q26 (non-public): What best describes the geographic area in which your organization works?

- City
- County
- Region
- Statewide

Q27 (non-public): What region(s) of the state do you work in? (For list of counties/cities within, see: <https://www.oregon.gov/lcd/CPU/Pages/Regional-Representatives.aspx>)

- Central Oregon (Counties of Crook, Deschutes, Hood River, Jefferson, Klamath, Lake, & Wasco)
- Eastern Oregon (Harney, Malheur, Sherman, Wallowa, Union, Baker, Grant, Umatilla, Morrow, Gillham, Wheeler)
- Mid-Willamette Valley (Counties of Marion, Polk & Yamhill)
- South-Willamette Valley (Counties of Benton, Linn, Lane except coastal portion)
- North Coast and Lower Columbia (Counties of Clatsop, Lincoln, Tillamook & Columbia)
- Portland Metro (Counties of Clackamas, Multnomah, Washington, & the city of Portland)
- South Coast (Coos & Curry counties plus coastal portions of Douglas & Lane Counties)
- Southern Oregon (Counties of Douglas, Gilliam, Grant, Jackson, Josephine, Morrow, Umatilla, Wheeler except coastal Douglas County)

Q28 (private only): What type(s) of housing does your business build or work on? (select all that apply)

- Single-unit detached dwellings
- Single-unit detached dwellings (e.g. townhomes)
- Duplexes
- Small, low-rise multi-unit structures/developments (3-10 units in structure or development)
- Larger, low-rise multi-unit structures/developments (10+ units in structure or development)
- Midrise multi-unit (5 over 1 construction, typically between 3-7 stories)
- Highrise multi-unit (no wood framing, typically greater than 7 stories)
- Accessory dwelling units
- Manufactured housing
- Other (Please specify): \_\_\_\_\_

Q29 (private only): How many units total does your company build or work on in a typical year (in and outside of Oregon)?

- Less than 5
- 5-9
- 10-19
- 20-50
- 50-99
- 100-499
- 500-999
- 1000 or more

Q30: (private only): How many units total does your company build or work on in a typical year in Oregon?

- Less than 5
- 5-9
- 10-19
- 20-50
- 50-99
- 100-499
- 500-999
- 1000 or more

Q31 (private only): How many employees does your company have in Oregon?

- None (I am the company)
- 1-4
- 5-9
- 10-19
- 20-50
- 50-99
- 100 or more

Q32 (private only): Have you hired new employees in Oregon in the past year?

- No
- Yes
- Don't know

Q33 (private only): Was it difficult to fill open positions?

- No
- Yes

Q34 (private only): What contributed to challenges in filling open positions (check all that apply)

- The COVID-19 pandemic
- Lack of candidates
- Lack of technical skills/specialized education
- Work performance
- Lack of basic education (i.e. GED, high school diploma, etc.)
- Competition from other firms
- Location or commuting
- Other \_\_\_\_\_

**Next, we would like to understand your perceptions of housing need in your community.**

Q36: Please rate your level of agreement or disagreement with the following statements relative to your perception of housing need the community (or communities) you work in.

	Strongly Disagree	Disagree	Neither agree nor disagree	Agree	Strongly Agree	Don't know
There is a lack of affordable, market-rate rental units	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
There is a lack of market-rate, family-sized rental units	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
There is a lack of market-rate housing for ownership for households with moderate incomes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
There is a lack of market-rate housing for ownership for households with low incomes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
There is a lack of affordable units that are manufactured homes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
There is a lack of government assisted housing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
There is a lack of emergency shelter for people experiencing homelessness	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
There is a lack of sufficient housing options to meet diverse housing needs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q37 (public only): Please indicate your community's need for various income levels of housing, stated as a percentage of Area Median Income (AMI):

	Not needed	Minor need	Moderate need	Extreme need	Don't know
Less than 30% of AMI (Extremely Low Income)	<input type="checkbox"/>				
Between 30% and 50% of AMI (Very Low Income)	<input type="checkbox"/>				
Between 50% and 80% of AMI (Low Income)	<input type="checkbox"/>				
Between 80% and 120% of AMI (aka Workforce Housing)	<input type="checkbox"/>				
Greater than 120% of AMI	<input type="checkbox"/>				

Q38: Please indicate your community's level of additional need for the types of housing shown below:

	Not needed	Somewhat needed	Moderate need	Extreme need	Don't know
Detached single-unit	<input type="checkbox"/>				
Attached single- unit (e.g. townhome)	<input type="checkbox"/>				
Cluster Housing	<input type="checkbox"/>				
Duplexes (2 units)	<input type="checkbox"/>				
Multi-Unit (3 or 4 units)	<input type="checkbox"/>				
Multi-Unit (5 to 9 units)	<input type="checkbox"/>				
Multi-Unit (10 to 19 units)	<input type="checkbox"/>				
Multi-Unit (20 or more units)	<input type="checkbox"/>				
Accessory Dwellings	<input type="checkbox"/>				
Manufactured Dwellings	<input type="checkbox"/>				
Single Room Occupancy	<input type="checkbox"/>				
Nontraditional housing types such as tiny homes	<input type="checkbox"/>				

Q39: Please indicate your community's level of additional housing need for types of populations with special housing needs.

	Not needed	Minor need	Moderate need	Extreme need	Don't know
Transitional Housing	<input type="checkbox"/>				
Short-term or Interim Housing	<input type="checkbox"/>				
Emergency Shelter	<input type="checkbox"/>				
Permanent Supportive Housing	<input type="checkbox"/>				
Accessible Housing for People with Disabilities	<input type="checkbox"/>				
Independent Living for Adults with Special Needs	<input type="checkbox"/>				
Assisted Living for Adults with Special Needs	<input type="checkbox"/>				
Independent Living for Seniors	<input type="checkbox"/>				
Memory Care Facilities	<input type="checkbox"/>				
Family Sized Housing	<input type="checkbox"/>				

Q40: Please rate your level of agreement or disagreement with the following statements:

	Strongly Disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	Don't know
Our community has sufficient tools to address housing affordability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The tools our community has implemented have successfully helped address housing affordability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our residents perceive a housing affordability problem	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our local elected officials perceive a housing affordability problem	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our issues with housing affordability are more challenging than other Oregon communities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our community has done more than other Oregon communities to address housing affordability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q41: Please rate your level of agreement or disagreement with the following statements related to housing production:

	Strongly Disagree	Disagree	Neither Agree Nor Disagree	Agree	Strongly Agree	Don't know
Our community has sufficient tools to address housing production	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The tools our community has implemented have successfully helped address housing production	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our community has done more than other Oregon communities to address housing production	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q42: Have any residential projects (new construction) that were proposed (e.g., got to the permitting or grant application stages) in the last three years not moved forward?

- Yes
- No
- I don't know

Q43: What percent of projects did not move forward? (enter a whole number between 0 and 100)

\_\_\_\_\_

Q44: Please estimate the number of units. (leave blank if you don't know)

\_\_\_\_\_

Q45: Please select the reason(s) why the project(s) did not move forward. (Select all that apply). Don't know

- Could not secure funding
- Insufficient rents or project feasibility
- Neighborhood opposition
- Lack of political will
- Zoning/land use restrictions
- Building code requirements
- Parking requirements
- Environmental clean-up standards
- Withdrew application (no reason specified)
- Other: \_\_\_\_\_

Q46: The Oregon land use program requires cities to maintain a 20-year supply of buildable land. The program does not have any requirements that specifically address the supply of **development ready** land. Development ready, in this context, means that all major infrastructure is available to the site and that construction on the site could begin as soon as permits are issued. Please indicate your level of agreement or disagreement to the following statements.

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	Don't know
My community has a sufficient supply of development ready land to accommodate single-unit detached housing demand.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My community has a sufficient supply of development ready land to accommodate multiunit housing demand.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My community has a sufficient supply of development ready land to accommodate demand for other housing types.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q47 (public only): How effective do you feel your city's efforts to address housing production been?

- Extremely effective
- Very effective
- Moderately effective
- Slightly effective
- Not effective at all
- Don't know

Q48: How familiar are you with the Climate Friendly and Equitable Communities (CFEC) Rulemaking?

- Not at all
- I am aware of it, but know little
- I have moderate knowledge
- I have significant knowledge
- I have been tracking the rulemaking process carefully

Q49: To what extent do you perceive CFEC as a potential barrier to housing production.

- Not a barrier
- Minor barrier
- Moderate barrier
- Extreme barrier
- Don't know

Q50: Please use this space to elaborate on ways that you anticipate CFEC may help or hinder housing production in your community.

\_\_\_\_\_

Q51 (county only) Do you face any barriers specific to housing production in rural residential and/or incorporated areas?

\_\_\_\_\_

Q52: Is there anything else you would like to add related to housing production in Oregon?

\_\_\_\_\_

Q53: Would you be willing to talk to us further about housing in a follow-up interview?

- No
- Yes

Q54: Would you like to receive a copy of the final report by email?

- No
- Yes

Q55: Please provide your contact information for scheduling and interview or receiving the final report. We will not use your personally identifying information for other purposes besides follow-up or send you a final report.

Name \_\_\_\_\_

Email Address \_\_\_\_\_

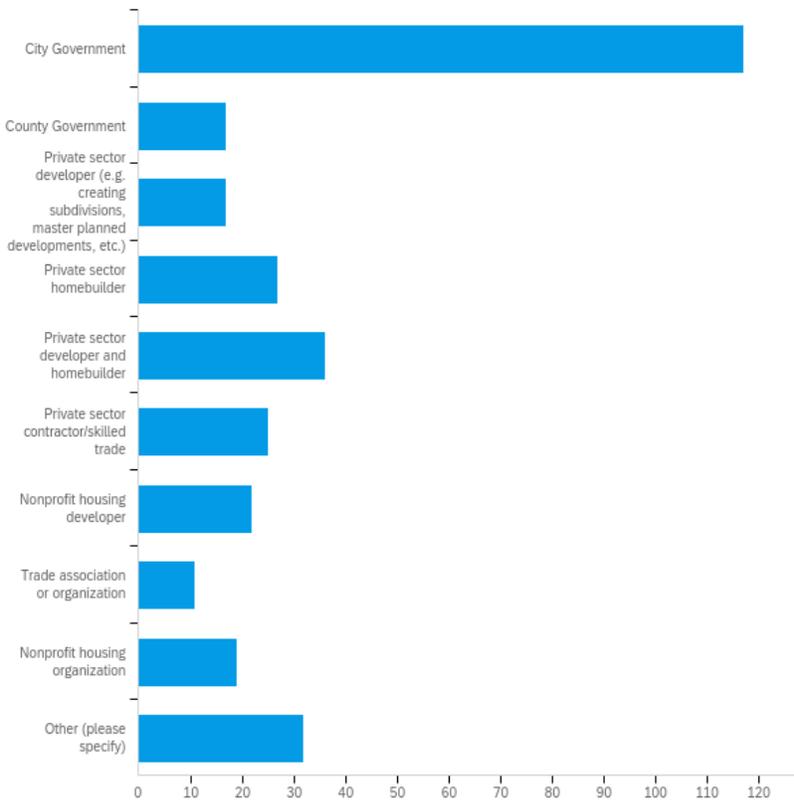
Phone \_\_\_\_\_

## Survey Results

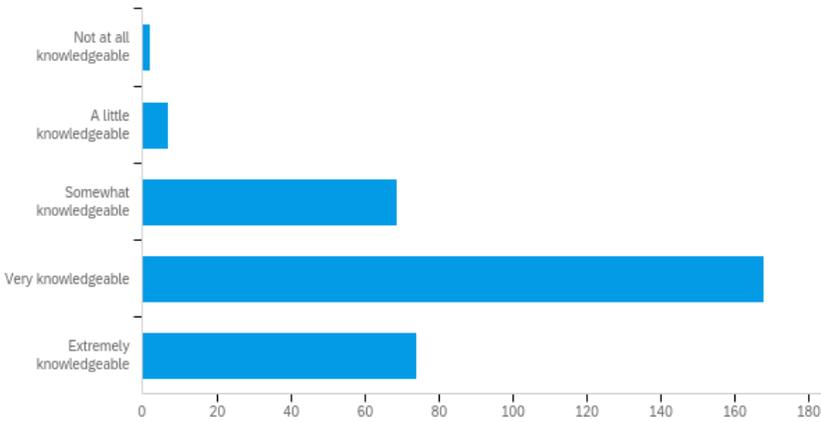
This section presents survey data for closed-ended questions in graphic and tabular format. We present the data without interpretation – the summary report provides analysis and interpretation of the survey results that are relevant to the study. We do not include the thousands of written comments respondents provided to open-ended questions. The summary report includes analysis of responses to open-ended questions.

The graphics and tables that follow are presented in the order the questions were asked on the survey instrument.

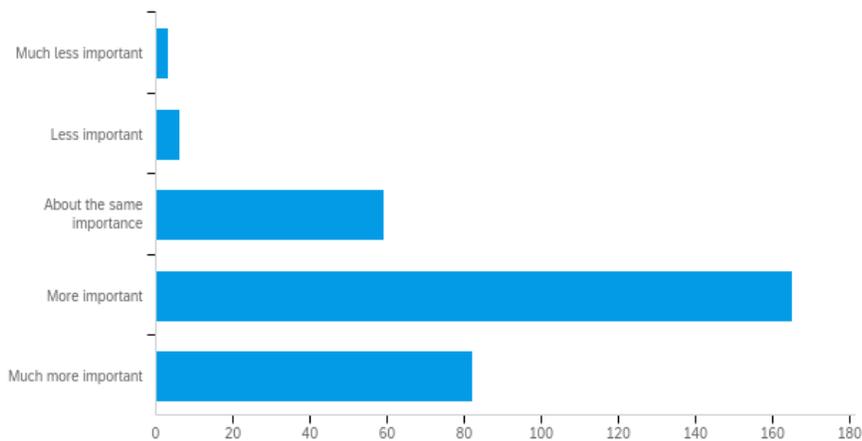
### Q3 - Please indicate the type of organization that best fits you:



**Q5 - Please indicate the extent to which you feel knowledgeable about housing issues in the community or the communities you work in.**



**Q6 - Please indicate the extent to which you perceive housing production to be important relative to other issues in your community or the communities you work in.**



**Q12 - Please indicate the extent to which you perceive land and land regulation are or are not barriers to housing production in your community:**

#	Question	Not a barrier		Minor barrier		Moderate barrier		Extreme barrier		Total
		%	Count	%	Count	%	Count	%	Count	
1	Lack of available vacant buildable lots (e.g. for sale or owned by builders)	4.81%	13	11.48%	31	22.59%	61	61.11%	165	270
2	Lack of larger (5+ acre) development ready tracts	7.45%	19	11.37%	29	27.06%	69	54.12%	138	255
3	Inability to bring land to a development ready state (e.g. bringing tract land to serviced lots ready for development)	3.97%	10	10.71%	27	38.49%	97	46.83%	118	252
4	High cost of land	2.27%	6	7.95%	21	20.08%	53	69.70%	184	264
5	Physically constrained lands (e.g. wetlands, steep slopes, etc.)	8.53%	22	21.71%	56	39.53%	102	30.23%	78	258
6	Wetland requirements	15.75%	40	30.31%	77	32.68%	83	21.26%	54	254
7	Other environmental review (e.g. riparian areas, etc.)	14.57%	37	36.22%	92	33.46%	85	15.75%	40	254
8	Not enough land zoned for single-unit housing	26.85%	69	18.68%	48	24.12%	62	30.35%	78	257
9	Not enough land zoned for multi-unit housing	11.72%	30	16.80%	43	33.98%	87	37.50%	96	256
10	Other zoning restrictions (e.g. lot size, minimum density requirements)	12.45%	33	22.64%	60	35.85%	95	29.06%	77	265
11	Parking Requirements	20.68%	55	28.95%	77	36.47%	97	13.91%	37	266
12	State Building Code Requirements	16.73%	41	37.14%	91	30.61%	75	15.51%	38	245
13	Right of Way dedication and frontage improvement requirements	15.33%	40	31.80%	83	38.70%	101	14.18%	37	261
14	Other public facility requirements (e.g. stormwater mitigation)	11.15%	29	24.62%	64	42.69%	111	21.54%	56	260
15	Other requirements associated with bringing land to a development-ready state (e.g. subdivision conditions of approval)	8.40%	21	25.20%	63	45.60%	114	20.80%	52	250

**Q13 - Please indicate the extent to which you perceive infrastructure financing and regulations are or are not barriers to housing production in your community:**

#	Question	Not a barrier		Minor barrier		Moderate barrier		Extreme barrier		Total
		%	Count	%	Count	%	Count	%	Count	
1	City System Development Charges (SDCs)	12.55%	32	20.00%	51	34.12%	87	33.33%	85	255
2	Other SDCs (e.g. Special Districts)	21.98%	51	18.97%	44	32.76%	76	26.29%	61	232
3	Funding to finance infrastructure improvements	5.58%	13	17.60%	41	38.63%	90	38.20%	89	233
4	Prioritizing projects Capital Improvement Plans	12.62%	26	24.27%	50	40.78%	84	22.33%	46	206
5	Coordination with state agencies on infrastructure development	12.44%	28	24.44%	55	40.89%	92	22.22%	50	225
6	Regulations governing infrastructure development	8.23%	19	21.21%	49	43.72%	101	26.84%	62	231
7	Transportation system-related improvements (e.g. intersection/collector/arterial improvements)	6.75%	16	21.94%	52	44.30%	105	27.00%	64	237

**Q14 - Please indicate the extent to which you perceive cost and financing factors are or are not barriers to housing production in your community:**

#	Question	Not a barrier		Minor barrier		Moderate barrier		Extreme barrier		Total
		%	Count	%	Count	%	Count	%	Count	
1	High construction Costs (materials)	0.00%	0	4.20%	11	20.99%	55	74.81%	196	262
2	High construction Costs (labor)	0.00%	0	6.59%	17	31.78%	82	61.63%	159	258
3	Lack of financing for land development (e.g., subdivision improvements)	12.32%	25	20.69%	42	34.98%	71	32.02%	65	203
4	Lack of financing for housing construction	16.20%	35	25.93%	56	29.17%	63	28.70%	62	216
5	Lack of financing for single-unit housing	32.14%	63	27.04%	53	27.55%	54	13.27%	26	196
6	Lack of financing for multi-unit housing	14.83%	31	24.88%	52	31.58%	66	28.71%	60	209
7	Lack of financing for manufactured housing	19.87%	31	20.51%	32	35.26%	55	24.36%	38	156
8	Lack of financing for missing middle housing	12.50%	22	20.45%	36	32.95%	58	34.09%	60	176

**Q15 - Please indicate the extent to which you perceive housing industry factors are or are not barriers to housing production in your community:**

#	Question	Not a barrier		Minor barrier		Moderate barrier		Extreme barrier		Total
1	Developers are not building enough housing that is needed and affordable	12.80%	32	10.40%	26	26.80%	67	50.00%	125	250
2	Developers are not building the types of housing needed for different household compositions and incomes	13.41%	33	14.63%	36	27.24%	67	44.72%	110	246
3	Not enough housing developers	26.92%	63	18.38%	43	28.21%	66	26.50%	62	234
4	Not enough housing developers building at a small scale (<10 units/development)	22.61%	52	20.00%	46	25.22%	58	32.17%	74	230
5	Not enough housing developers building at a large scale (10 or more units per development)	30.34%	71	22.65%	53	23.93%	56	23.08%	54	234
6	Not enough housing developers focused on infill development	23.26%	50	25.58%	55	30.70%	66	20.47%	44	215
7	Not enough housing developers focused on greenfield development	44.62%	87	29.23%	57	17.44%	34	8.72%	17	195
8	High cost/limited supply of construction workers, generally	1.65%	4	7.02%	17	33.06%	80	58.26%	141	242
9	High cost/limited supply of skilled labor (e.g. licensed tradespersons)	1.67%	4	5.83%	14	26.67%	64	65.83%	158	240
10	Insufficient workers in skilled trades	1.69%	4	9.32%	22	26.27%	62	62.71%	148	236
11	Not enough workers for other jobs	3.65%	8	15.07%	33	34.25%	75	47.03%	103	219
12	Lack of quality developers/builders	17.24%	40	25.00%	58	39.66%	92	18.10%	42	232
13	Lack of contractor capacity	6.81%	16	11.06%	26	37.87%	89	44.26%	104	235

**Q16 - Please indicate the extent to which you perceive housing demand factors are or are not barriers to housing production in your community:**

#	Question	Not a barrier		Minor barrier		Moderate barrier		Extreme barrier		Don't know		Total
		%	Count	%	Count	%	Count	%	Count	%	Count	
1	Lack of market demand for single unit housing	84.56%	219	7.72%	20	3.09%	8	1.54%	4	3.09%	8	259
2	Lack of market demand for multi-unit housing	76.45%	198	9.27%	24	6.18%	16	4.63%	12	3.47%	9	259
3	Lack of market demand for manufactured housing	57.53%	149	11.58%	30	6.18%	16	1.93%	5	22.78%	59	259
4	Community experiencing population loss	76.83%	199	10.04%	26	5.79%	15	1.93%	5	5.41%	14	259
5	Development not keeping pace with population growth	10.16%	26	9.77%	25	23.44%	60	54.69%	140	1.95%	5	256
6	Demand for second homes	41.31%	107	14.67%	38	15.06%	39	11.97%	31	16.99%	44	259
7	Demand for short-term rentals	29.73%	77	18.92%	49	20.46%	53	17.37%	45	13.51%	35	259
8	Limited ability for low and moderate income to compete in the market	5.02%	13	8.49%	22	14.29%	37	69.88%	181	2.32%	6	259
9	Demand from high income households	28.19%	73	19.31%	50	19.69%	51	23.55%	61	9.27%	24	259

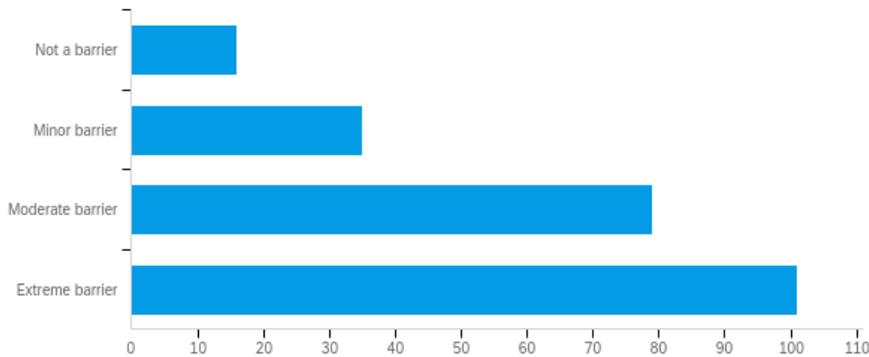
**Q17 - Please indicate the extent to which you perceive public processes and permitting are or are not barriers to housing production in your community:**

#	Question	Not a barrier		Minor barrier		Moderate barrier		Extreme barrier		Total
1	Lack of political will from elected officials	26.32%	65	16.19%	40	25.91%	64	31.58%	78	247
2	Opposition from neighbors	10.98%	28	21.96%	56	34.12%	87	32.94%	84	255
3	Length of time it takes to process land use entitlements	16.53%	41	16.94%	42	20.16%	50	46.37%	115	248
4	Length of time to process building permits	20.32%	51	22.71%	57	19.92%	50	37.05%	93	251
5	Permit fees	16.53%	41	25.40%	63	30.65%	76	27.42%	68	248
6	Permit requirements	14.74%	37	27.89%	70	34.26%	86	23.11%	58	251
7	Cost of SDCs	14.92%	37	18.15%	45	30.24%	75	36.69%	91	248
8	Public hearings in the land use process	14.69%	36	26.12%	64	34.29%	84	24.90%	61	245
9	General uncertainty in the land use entitlement process	13.25%	31	26.07%	61	30.77%	72	29.91%	70	234
10	Impact of building codes on use of innovative construction techniques (e.g., 3D printed units, modular units, cross-laminated timber or mass timber, etc)	17.10%	33	25.39%	49	31.09%	60	26.42%	51	193

Q18\_govtassit - Please indicate the extent to which you perceive issues specific to government assisted housing are or are not barriers to housing production in your community:

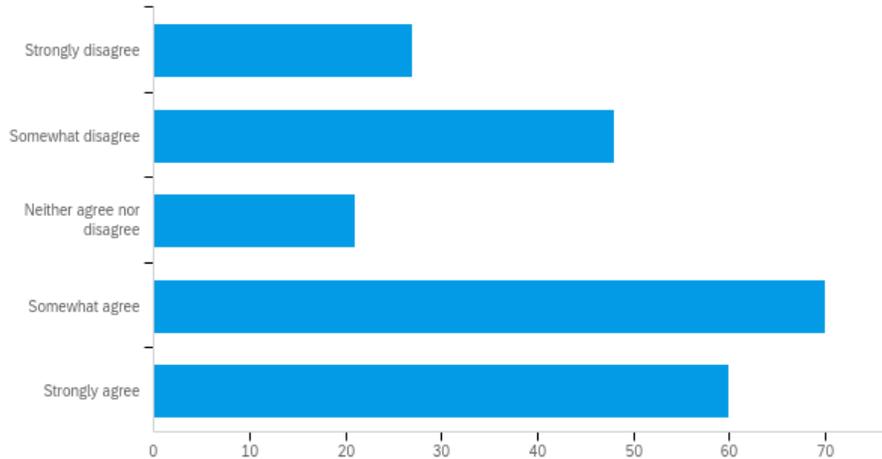
#	Question	Not a barrier		Minor barrier		Moderate barrier		Extreme barrier		Total
		%	Count	%	Count	%	Count	%	Count	
1	Amount of grant funding available for projects	3.13%	1	6.25%	2	31.25%	10	59.38%	19	32
2	Timing of grant funding for projects	10.00%	3	6.67%	2	26.67%	8	56.67%	17	30
3	Process of applying for grant funding	6.67%	2	10.00%	3	30.00%	9	53.33%	16	30
4	Assembling capital stacks for projects	0.00%	0	12.90%	4	22.58%	7	64.52%	20	31
5	Complexity of applying for grant funding	6.67%	2	6.67%	2	23.33%	7	63.33%	19	30
6	Cost of applying for grant funding	9.68%	3	16.13%	5	32.26%	10	41.94%	13	31
7	Limited opportunities to apply for grant funding	3.23%	1	19.35%	6	16.13%	5	61.29%	19	31
8	Time elapsed from applying for grant funding and receiving funding	10.00%	3	13.33%	4	23.33%	7	53.33%	16	30
9	Interest rates	3.23%	1	25.81%	8	35.48%	11	35.48%	11	31
10	Inflation	0.00%	0	15.63%	5	18.75%	6	65.63%	21	32
11	Construction standards for government-assisted housing	6.90%	2	34.48%	10	24.14%	7	34.48%	10	29
12	Cost of Labor	0.00%	0	12.90%	4	35.48%	11	51.61%	16	31

Q21 - One issue that emerged from our previous research was the difficulty in bringing infrastructure (e.g. water, sewer, etc.) to residential land already within the UGB, thereby making it "development ready." To what extent would you rate this as a barrier in your community?

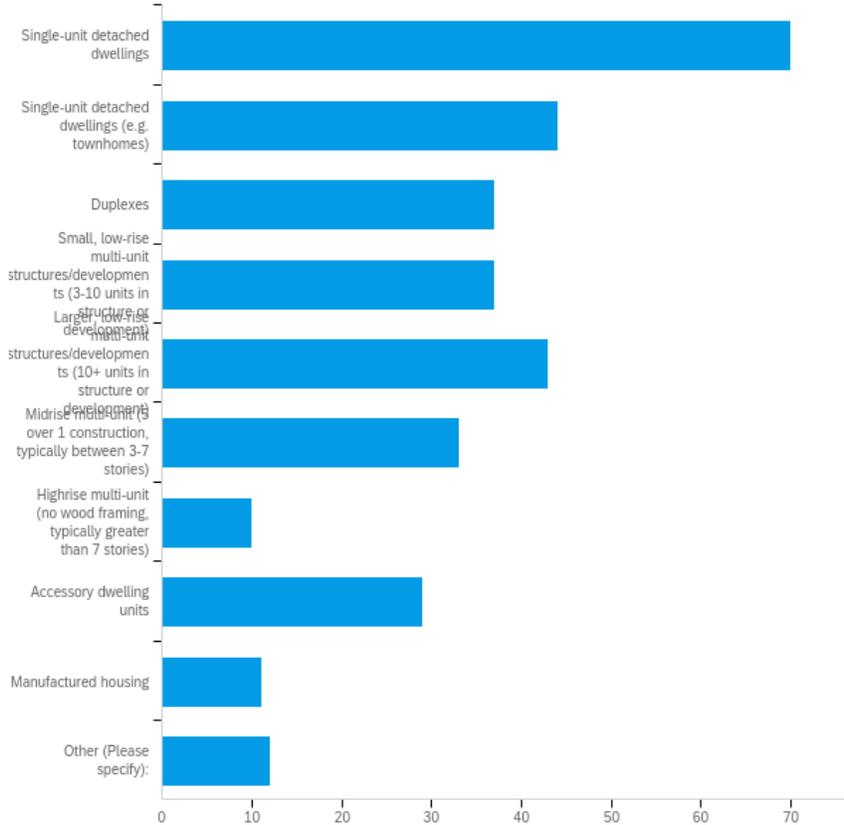


Q23 - To what extent do you agree or disagree that the zoning regulations in the community you work in have "clear and objective" standards as required by state statute? The definition of clear and objective is provided below.

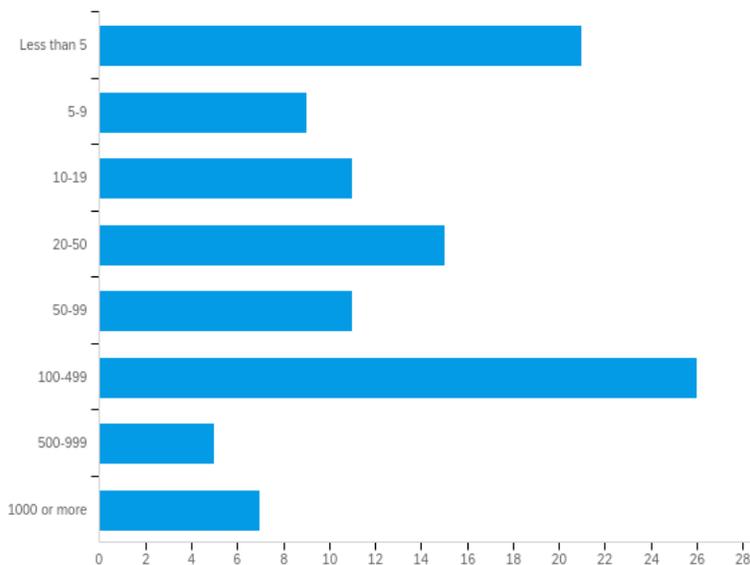
Definition: (1) Except as provided in section (2) of this rule, a local government may adopt and apply only clear and objective standards, conditions and procedures regulating the development of housing, including needed housing. The standards, conditions and procedures may not have the effect, either in themselves or cumulatively, of discouraging needed housing through unreasonable cost or delay.



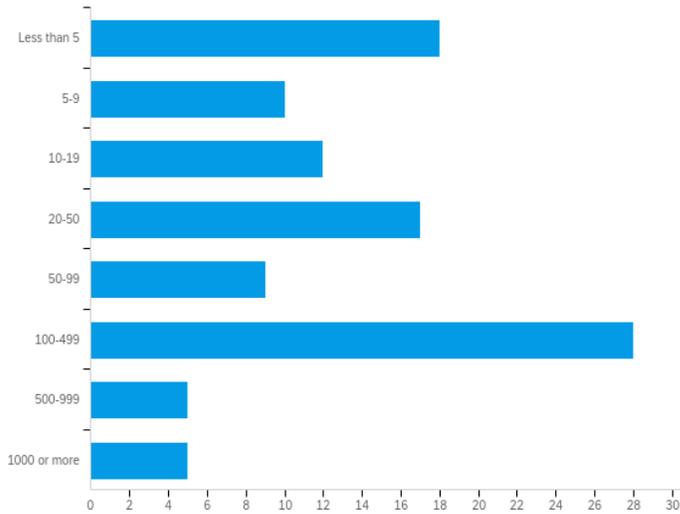
**Q28 - What type(s) of housing does your business build or work on? (select all that apply)**



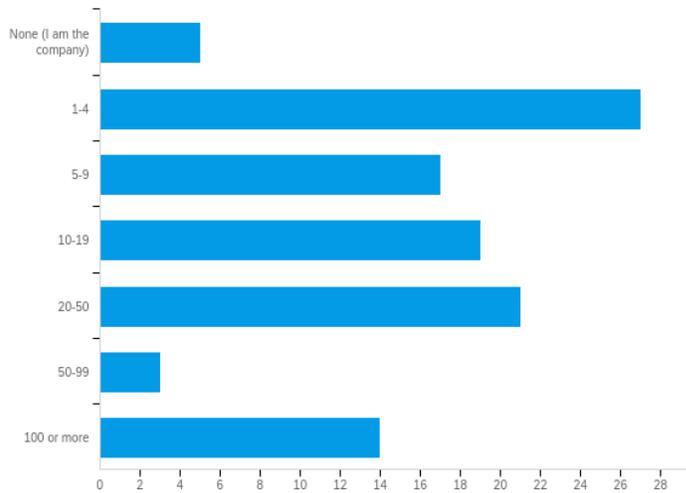
**Q29 - How many units total does your company build or work on in a typical year (in and outside of Oregon)?**



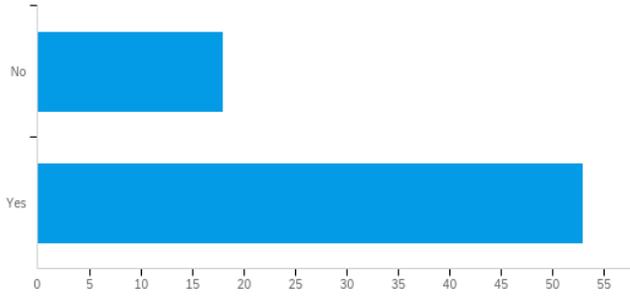
**Q30 - How many units total does your company build or work on in a typical year in Oregon?**



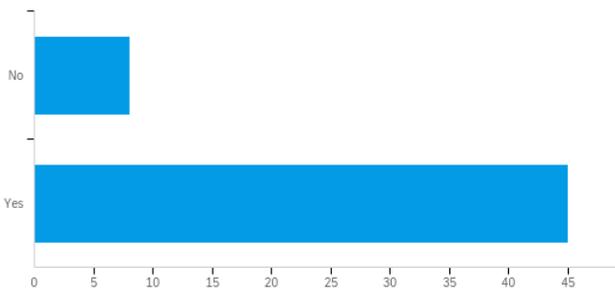
**Q31 - How many employees does your company have in Oregon?**



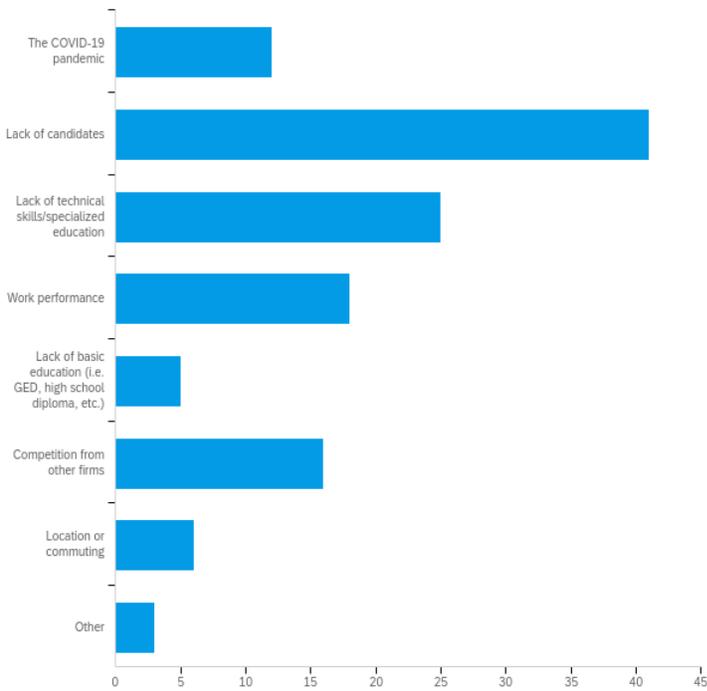
**Q32 - Have you hired new employees in Oregon in the past year?**



**Q33 - Was it difficult to fill open positions?**



**Q34\_empl\_challenges - What contributed to challenges in filling open positions (check all that apply)**



**Q36= - Please rate your level of agreement or disagreement with the following statements relative to your perception of housing need the community (or communities) you work in.**

#	Question	Strongly Disagree		Disagree		Neither agree nor disagree		Agree		Strongly Agree		Don't know		Total
		%	Count	%	Count	%	Count	%	Count	%	Count	%	Count	
1	There is a lack of affordable, market-rate rental units	1.22%	3	0.41%	1	3.67%	9	21.22%	52	72.24%	177	1.22%	3	245
2	There is a lack of market-rate, family-sized rental units	0.41%	1	2.04%	5	5.31%	13	22.04%	54	66.94%	164	3.27%	8	245
3	There is a lack of market-rate housing for ownership for households with moderate incomes	0.82%	2	0.82%	2	2.46%	6	23.77%	58	70.90%	173	1.23%	3	244
4	There is a lack of market-rate housing for ownership for households with low incomes	0.82%	2	0.82%	2	3.27%	8	11.02%	27	82.86%	203	1.22%	3	245
5	There is a lack of affordable units that are manufactured homes	1.63%	4	4.47%	11	11.79%	29	16.67%	41	43.50%	107	21.95%	54	246
6	There is a lack of government assisted housing	6.10%	15	6.91%	17	10.98%	27	16.67%	41	45.12%	111	14.23%	35	246
7	There is a lack of emergency shelter for people experiencing homelessness	3.66%	9	9.35%	23	14.63%	36	16.26%	40	49.59%	122	6.50%	16	246
8	There is a lack of sufficient housing options to meet diverse housing needs	1.63%	4	3.66%	9	5.69%	14	15.45%	38	69.92%	172	3.66%	9	246

**Q37 - Please indicate your community's need for various income levels of housing, stated as a percentage of Area Median Income (AMI):**

#	Question	Not needed		Minor need		Moderate need		Extreme need		Total
		%	Count	%	Count	%	Count	%	Count	
1	Less than 30% of AMI (Extremely Low Income)	4.35%	4	10.87%	10	21.74%	20	63.04%	58	92
2	Between 30% and 50% of AMI (Very Low Income)	2.17%	2	8.70%	8	20.65%	19	68.48%	63	92
3	Between 50% and 80% of AMI (Low Income)	1.08%	1	4.30%	4	26.88%	25	67.74%	63	93
4	Between 80% and 120% of AMI (aka Workforce Housing)	2.17%	2	4.35%	4	33.70%	31	59.78%	55	92
5	Greater than 120% of AMI	16.28%	14	23.26%	20	44.19%	38	16.28%	14	86

**Q38 - Please indicate your community's level of additional need for the types of housing shown below:**

#	Question	Not needed		Somewhat needed		Moderate need		Extreme need		Total
		%	Count	%	Count	%	Count	%	Count	
1	Detached single-unit	5.75%	13	17.26%	39	29.65%	67	47.35%	107	226
2	Attached single- unit (e.g. townhome)	4.46%	10	9.82%	22	34.38%	77	51.34%	115	224
3	Cluster Housing	9.85%	20	12.32%	25	32.51%	66	45.32%	92	203
4	Duplexes (2 units)	2.68%	6	8.93%	20	36.16%	81	52.23%	117	224
5	Multi-Unit (3 or 4 units)	3.62%	8	8.60%	19	27.15%	60	60.63%	134	221
6	Multi-Unit (5 to 9 units)	6.05%	13	9.77%	21	29.30%	63	54.88%	118	215
7	Multi-Unit (10 to 19 units)	8.06%	17	13.74%	29	26.54%	56	51.66%	109	211
8	Multi-Unit (20 or more units)	10.33%	22	15.49%	33	25.35%	54	48.83%	104	213
9	Accessory Dwellings	9.39%	20	23.00%	49	31.92%	68	35.68%	76	213
10	Manufactured Dwellings	9.09%	17	20.32%	38	32.09%	60	38.50%	72	187
11	Single Room Occupancy	14.36%	26	27.07%	49	22.65%	41	35.91%	65	181
12	Nontraditional housing types such as tiny homes	21.72%	43	24.24%	48	25.76%	51	28.28%	56	198

**Q39 - Please indicate your community's level of additional housing need for types of populations with special housing needs.**

#	Question	Not needed		Minor need		Moderate need		Extreme need		Total
1	Transitional Housing	10.17%	12	21.19%	25	26.27%	31	42.37%	50	118
2	Short-term or Interim Housing	11.97%	14	17.09%	20	38.46%	45	32.48%	38	117
3	Emergency Shelter	7.63%	9	27.12%	32	17.80%	21	47.46%	56	118
4	Permanent Supportive Housing	6.72%	8	16.81%	20	21.85%	26	54.62%	65	119
5	Accessible Housing for People with Disabilities	1.72%	2	15.52%	18	36.21%	42	46.55%	54	116
6	Independent Living for Adults with Special Needs	4.76%	5	20.95%	22	37.14%	39	37.14%	39	105
7	Assisted Living for Adults with Special Needs	5.77%	6	21.15%	22	37.50%	39	35.58%	37	104
8	Independent Living for Seniors	3.64%	4	17.27%	19	40.00%	44	39.09%	43	110
9	Memory Care Facilities	12.09%	11	32.97%	30	23.08%	21	31.87%	29	91
10	Family Sized Housing	4.24%	5	5.93%	7	29.66%	35	60.17%	71	118

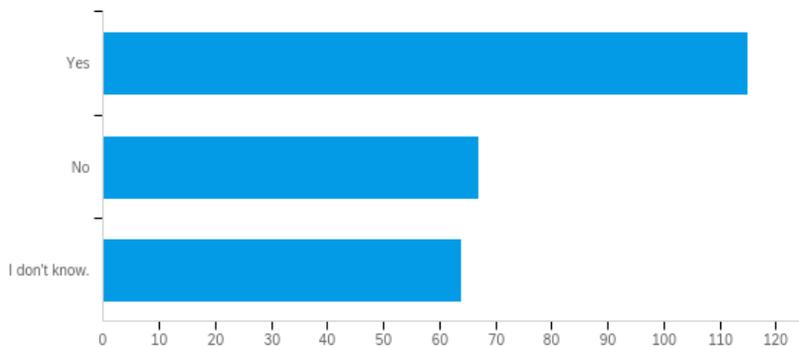
**Q40 - Please rate your level of agreement or disagreement with the following statements:**

#	Question	Strongly Disagree		Disagree		Neither agree nor disagree		Agree		Strongly agree		Total
1	Our community has sufficient tools to address housing affordability	33.90%	80	46.61%	110	11.86%	28	6.78%	16	0.85%	2	236
2	The tools our community has implemented have successfully helped address housing affordability	29.00%	67	34.20%	79	16.45%	38	16.88%	39	3.46%	8	231
3	Our residents perceive a housing affordability problem	3.75%	9	2.50%	6	5.00%	12	25.83%	62	62.92%	151	240
4	Our local elected officials perceive a housing affordability problem	4.31%	10	7.33%	17	10.78%	25	32.33%	75	45.26%	105	232
5	Our issues with housing affordability are more challenging than other Oregon communities	3.11%	7	16.89%	38	36.44%	82	18.22%	41	25.33%	57	225
6	Our community has done more than other Oregon communities to address housing affordability	16.20%	35	25.46%	55	33.80%	73	17.13%	37	7.41%	16	216

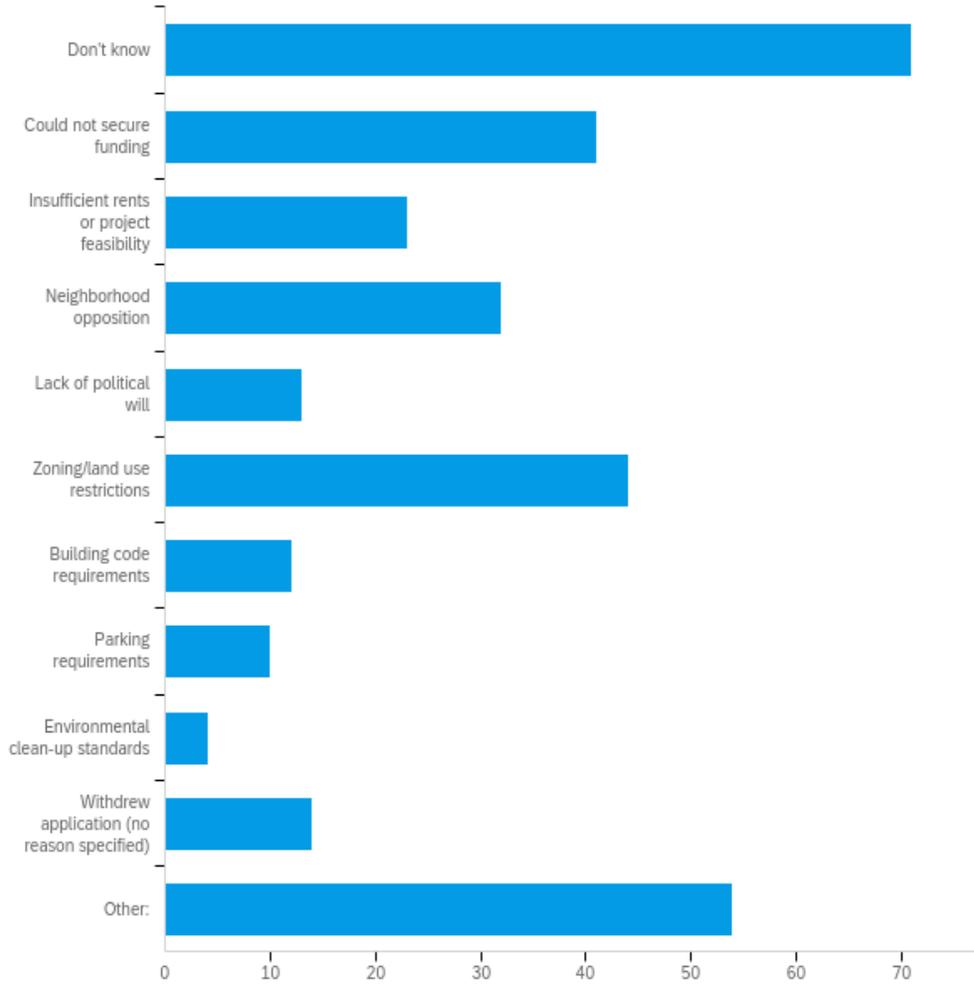
**Q41 - Please rate your level of agreement or disagreement with the following statements related to housing production:**

#	Question	Strongly Disagree		Disagree		Neither Agree Nor Disagree		Agree		Stongly Agree		Total
		%	Count	%	Count	%	Count	%	Count	%	Count	
1	Our community has sufficient tools to address housing production	26.96%	62	42.17%	97	19.13%	44	10.43%	24	1.30%	3	230
2	The tools our community has implemented have successfully helped address housing production	22.12%	50	31.42%	71	26.11%	59	19.47%	44	0.88%	2	226
3	Our community has done more than other Oregon communities to address housing production	17.70%	37	28.71%	60	34.93%	73	13.40%	28	5.26%	11	209

**Q42 - Have any residential projects (new construction) that were proposed (e.g., got to the permitting or grant application stages) in the last three years not moved forward?**



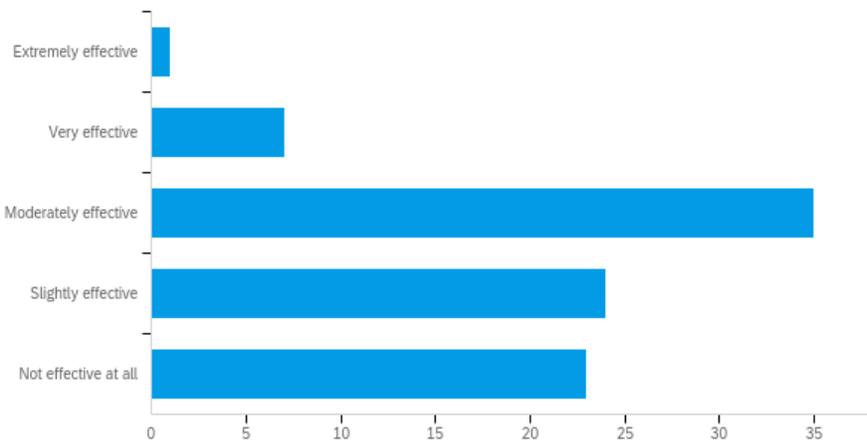
Q45 - Please select the reason(s) why the project(s) did not move forward. (Select all that apply).



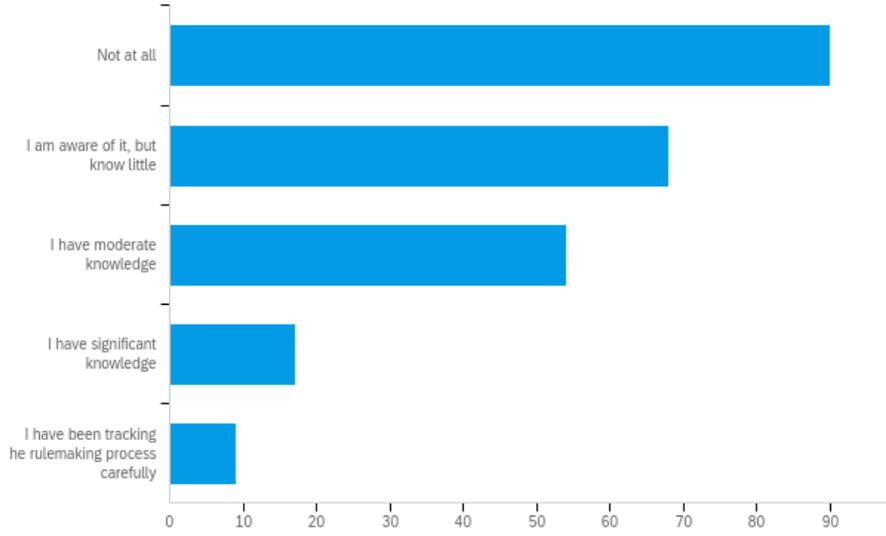
**Q46 - The Oregon land use program requires cities to maintain a 20-year supply of buildable land. The program does not have any requirements that specifically address the supply of development ready land. Development ready, in this context, means that all major infrastructure is available to the site and that construction on the site could begin as soon as permits are issued. Please indicate your level of agreement or disagreement to the following statements.**

#	Question	Strongly disagree		Disagree		Neither agree nor disagree		Agree		Strongly agree		Total
1	My community has a sufficient supply of development ready land to accommodate single-unit detached housing demand.	32.46%	37	30.70%	35	13.16%	15	19.30%	22	4.39%	5	114
2	My community has a sufficient supply of development ready land to accommodate multiunit housing demand.	36.84%	42	35.96%	41	11.40%	13	14.04%	16	1.75%	2	114
3	My community has a sufficient supply of development ready land to accommodate demand for other housing types.	34.51%	39	35.40%	40	15.93%	18	11.50%	13	2.65%	3	113

**Q47 - How effective do you feel your city's efforts to address housing production been?**



**Q48 - How familiar are you with the Climate Friendly and Equitable Communities (CFEC) Rulemaking?**



**Q49 - To what extent do you perceive CFEC as a potential barrier to housing production.**

