

Affordable Housing Initiative

Year Three Evaluation

Advocacy, Policy & Systems Change



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Executive Summary

The vision of Meyer Memorial Trust's Affordable Housing Initiative (AHI) is that every Oregonian has a decent, safe and affordable place to call home. Meyer has committed to invest more than \$15 million from FY15-19 to further this vision. Recognizing that creating equitable access to housing will require systemic change, the AHI includes a strong emphasis on supporting organizations engaged in advocacy, policy and systems change that is woven throughout its funding strategies.

This report analyzes the AHI's support for housing-related advocacy, policy and systems change during the AHI's third year of implementation, covering the period from January-December 2017. It begins with an overview of the various ways that Meyer supported this work in 2017. Then it illustrates the impact of this support by highlighting the 2017 achievements of a representative sample of AHI partners and grantees. Because advocacy, policy and systems change are long-term endeavors, the report places particular focus on the achievements of multi-year AHI partners and grantees.

Key accomplishments of AHI grantees that are highlighted in the report include:

- Coordinated advocacy during the 2017 state legislative session helped to secure more than \$150 million in new affordable housing resources and expanded the available tools for preserving and increasing the state's affordable housing stock.
- A diverse coalition of tenants and advocates brought increased attention to the issue of tenant rights and tenant protections as a key component of Oregon's housing crisis.
- Advocates and leaders in cities across Oregon led successful campaigns to adopt construction excise taxes that will provide an essential local funding source for affordable housing.
- A cross-systems, inter-jurisdictional collaborative in Multnomah County leveraged the results of several AHI-funded pilot projects to drive local policy and systems changes to address homelessness.
- AHI support for research, innovation, education and convening helped to lay the foundation for broader systems change.
- AHI funding helped to strengthen the capacity of communities of color and underserved rural communities to engage in housing-related advocacy and organizing, expanding the base for housing advocacy across the state.

The report also analyzes the challenges and lessons learned from the AHI's support of advocacy, policy and systems change work in 2017. Among the findings:

- Advocacy and policy change are long-term activities that require sustained capacity and investment. The slow pace of change can make it difficult to leverage the resources necessary to sustain this work over the long haul.
- Systems change is a complex and difficult process with numerous regulatory, legal, bureaucratic and technical obstacles. This can make it difficult to demonstrate measurable results in the short term.
- While the accomplishments of the past year are impressive, advocates are pushing against a tide of market forces and federal policy shifts that pose significant challenges.
- Few other Oregon funders have yet to invest in this work, despite Meyer's efforts to expand the available resource pool.

Several important lessons have emerged from the AHI's support of organizations engaging in advocacy, policy and systems change that will shape its funding strategies going forward. The final section of the report summarizes Meyer's next steps for advancing this work.

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Introduction

Meyer Memorial Trust believes that decent, safe and affordable housing is the foundation for personal stability, thriving families and strong communities. Through its [Affordable Housing Initiative](#) (AHI), Meyer has dedicated more than \$15 million in investments from 2015 to 2019 to explore innovation, support systems change and leverage resources to meet the housing needs of Oregonians.

The AHI Framework focuses on three primary goals:

1. Strengthen the foundation: Build on previous investments to strengthen the long-term health and sustainability of Oregon's existing affordable housing
2. Foster innovation: Catalyze innovative strategies to increase the availability of affordable housing and support residents' stability and success
3. Secure the future: Develop resources and policies that will expand the availability of affordable housing into the future

Recognizing that moving the dial on Oregon's affordable housing crisis will require systemic change, the AHI's funding strategies incorporate a strong commitment to supporting organizations engaged in advocacy, policy and systems change. The AHI's investments aim to strengthen the capacity of low-income residents – particularly communities of color and underserved rural communities – to engage in grassroots organizing and advocacy. The AHI also supports policy research and analysis, coalition-building, demonstration projects and communications strategies that will help to move forward changes in policy, planning, and resources to increase access to affordable housing.

This report highlights the advocacy, policy and systems change work of AHI grantees during the AHI's third year of implementation, covering the period from January-December 2017. It is part of a series of annual evaluations that Meyer has commissioned to highlight the work of AHI grantees and ensure that the AHI investments contribute to broader learning.

Data sources for this report include:

- Interviews and e-mail exchanges with key AHI partners and grantees
- AHI grantee annual reports submitted in 2017
- Interviews with Meyer's AHI staff
- Strategy summaries prepared by AHI staff
- Information shared at convenings of AHI grantees

AHI 2017 Advocacy, Policy & Systems Change Investments and Activities

The majority of the AHI's investments in 2017 included support for advocacy, policy and/or systems change. Meyer grants cannot be earmarked for lobbying or for influencing specific legislation, but AHI grants supported organizations engaged in a range of other strategies including community organizing, leadership development, coalition building, policy research, convening, piloting innovative strategies and issue education. In some cases, the entire AHI grant was focused on advocacy, policy or systems change work. In other cases, this work was funded as an element of a broader project in an effort to expand the project's impact. The following examples illustrate the variety of ways that housing-related advocacy, policy and systems change were incorporated into the AHI's 2017 investments:

- Support for community-driven organizing and advocacy at the local and state levels through grants to five organizations that were awarded \$400,746 in two-year grants under the 2015 Advocacy RFP and funding for 12 organizations that were awarded \$717,000 in one- and two-year grants under the 2017 Advocacy RFP.
- Support for the Oregon Housing Alliance's statewide coalition building and advocacy work through two multi-year grants totaling \$260,000 awarded in 2015 and two single-year grants totaling \$120,000 awarded in 2017.
- Support for the Oregon Housing Preservation Project (OHPP) through a two-year \$300,000 grant awarded to the Network for Oregon Affordable Housing in 2015. The grant includes support for state and federal advocacy to protect affordable units at risk of being lost.
- Funding to enable the Housing Development Center to translate the lessons from Meyer's Sustaining Portfolios Strategy into policy and systems change recommendations through a \$75,000 grant awarded in 2016 for research, convening, policy development and messaging work.
- Support for six projects that were awarded \$575,000 in multi-year grants through the 2015 Private Market Units RFP, with the goal of developing replicable strategies and policy solutions to increase low-income renters' access to private market units.
- Investments in demonstration projects that aim to strengthen the connections between housing and other related service systems through support for five organizations that were awarded \$666,801 in multi-year grants through the 2015 Systems Alignment RFP and eight organizations that were awarded \$922,438 in grants under the 2017 RFP.
- Funding polling research related to a possible amendment to the state constitution that would give more flexibility to the use of housing bond proceeds.
- Support for policy-related convenings through technical assistance grants and sponsorships.

Meyer also supported the AHI's advocacy, policy and systems change goals through its work beyond grantmaking as a convener, partner and leader. For example:

- AHI staff participated on the Executive Committee of *A Home for Everyone*, a cross-systems collaboration to address homelessness in Multnomah County.
- Meyer convened Advocacy RFP grantees to deepen network connections, identify and document lessons learned, and strategize about next steps.
- Meyer encouraged other regional funders to support housing-related advocacy and policy work by inviting funders to attend the Advocacy grantee convening, and by organizing a funder gathering in conjunction with a visit from the national Funders Together to End Homelessness.
- Meyer brought national attention to the AHI's policy, systems change and equity work through its participation in conferences and peer learning sponsored by Funders Together to End Homelessness.
- In the run up to the 2017 legislative session, Meyer's CEO reached out to key legislators to update them on Meyer's housing priorities and offer Meyer's support as a resource on those issues. During the session, Meyer's CEO was invited by the House Committee on Human Services and Housing to give testimony on Meyer's investments in affordable housing and the importance of supporting housing preservation and rural housing.

AHI 2017 Advocacy, Policy & Systems Change Achievements

Advocacy, policy and systems change are inherently long-term endeavors. Through the AHI, Meyer has built several multi-year partnerships that demonstrate the benefits of engaging in this work in a sustained way over time. This section focuses on several of these partnerships, highlighting their achievements in 2017. It also summarizes the broader impact of the AHI's 2017 investments in laying the foundation for systems change and building the base for affordable housing advocacy throughout Oregon.

Oregon Housing Alliance

The Oregon Housing Alliance was formed in 2003 to create a unified coalition to advocate for affordable housing in the state legislature. The Alliance brings together 80 nonprofits, local governments, housing authorities and advocates to build a common statewide policy agenda. Recognizing the value of sustained coalition capacity and coordination over time, the AHI has funded the Housing Alliance's work through directed grants to Neighborhood Partnerships, its sponsor, since the first AHI in 2012. Meyer's multi-year funding has enabled the Alliance to build and sustain the necessary policy expertise and organizing capacity to grow and strengthen its coalition.

Since 2015, the AHI has also provided funding to diversify the range of voices involved in the Alliance's work and expand the coalition's reach. In 2017, this brought new partners to the table including groups from the Columbia River Gorge, Lane County and Central Oregon, and the re-engagement of members in Southern Oregon. The Housing Alliance also built stronger partnerships with groups representing communities of color and increased the involvement of faith-based organizations and members who advocate directly for people experiencing homelessness.

The Alliance also made significant gains in 2017 in recruiting younger leadership and in broadening its leadership to include not just the Executive Directors of its member organizations, but a wide range of staff. It also implemented new strategies to support the continued development of these newer leaders through stipends and mentoring.



Leaders from immigrant communities and Elders in Action meet with Rep. Diego Hernandez in a forum organized by Elders in Action and the Housing Alliance
Photo courtesy of Neighborhood Partnerships

During the 2017 legislative session, under the Alliance's umbrella, advocates developed a coordinated set of proposals and engaged residents and leaders from across the state to educate legislators about housing needs and solutions. Their advocacy helped to secure more than \$150 million in new affordable housing resources in the state's biennial budget, including:

- \$40 million in general fund revenue for programs that provide critical funds to local communities to prevent and end homelessness and provide emergency shelter,
- \$50 million for the Oregon Affordable Housing Tax Credit, a tool that is used to fund the development and preservation of affordable housing, and
- \$80 million in general obligation bonds for the Local Innovation and Fast Track (LIFT) program to help local communities throughout the state to meet their housing needs.

Advocates also secured policy changes during the 2017 session that will support increased affordable housing development. These include a land acquisition program to help affordable housing developers to purchase and hold land while they assemble the necessary financing, policy changes to allow churches to build affordable housing on their land, and the removal of regulatory barriers to enable the development of tiny homes.

While the Housing Alliance's primary focus is on state-level policy, it also provides support to advocates working to advance affordable housing strategies at the local level. One of the Alliance's key affordable housing wins during the 2016 legislative session was a bill lifting the state ban on construction excise taxes (CETs). Since then, eight Oregon local jurisdictions have adopted CETs to provide funding for affordable housing, and CET proposals are under consideration in several other municipalities. Meyer's AHI Advocacy funding supported local affordable housing coalitions and advocacy groups that have played a key role in several of these CET campaigns.

Oregon Housing Preservation Project

Federally-funded, project-based rental assistance programs provide homes for more than 16,000 extremely low-income households throughout Oregon. Many of these units are at risk of conversion to market rates as their rental assistance contracts expire. One of the top priorities of Meyer's first AHI (2007-12) was to create a statewide system to preserve these at-risk units. Meyer seeded a new loan fund with a \$4 million program related investment (PRI) and provided grant funds to establish the Oregon Housing Preservation



Home Forward residents Hubert and Tomirene visit the Oregon Capitol to advocate for preservation
Photo courtesy of Home Forward

Project (OHPP) under the administration of the Network for Oregon Affordable Housing (NOAH). Meyer has continued to support the OHPP through its current AHI, with an expanded focus on a broad range of housing preservation goals in addition to federally-subsidized units.

Meyer's ongoing support has enabled the OHPP to build awareness among housing advocates and legislators about preservation issues and has raised the profile of preservation as a top affordable housing priority at the state and in local jurisdictions. The OHPP has played a lead role in monitoring at-risk properties, identifying and removing barriers to preservation, and promoting policy changes to support preservation.

The OHPP's advocacy efforts have helped to ensure the passage of dedicated preservation funding in every session of the legislature since 2007, totaling more than \$71 million to date. During the 2017 legislative session, advocacy by the OHPP in partnership with the Housing Alliance contributed to some particularly noteworthy policy wins:

- \$25 million in lottery-backed bonds was allocated for preservation gap funding – ten times the amount from each of the prior two sessions. These funds will support the recapitalization and preservation of up to 1,000 units of subsidized housing.
- Legislators funded the creation and ongoing management of a formal housing preservation program at Oregon Housing and Community Services – a step that will help to elevate the state's work on preservation and expand its tools for monitoring and protecting at-risk properties.
- Policy changes will require owners of publicly supported housing with an expiring contract to provide two years' notice before the contract expires and right of first refusal on the property's sale. These

changes will strengthen the ability of the state and local jurisdictions to intervene to preserve at-risk properties before they are lost.

A Home for Everyone

Every night, more than 4,000 people experience homelessness in Multnomah County – more than double the number in any other Oregon county. In 2014, local public agencies and nonprofits launched an innovative, cross-jurisdictional collaborative initiative called *A Home for Everyone* (AHFE) to address the county’s homelessness crisis. AHFE is led by an executive committee made up of elected officials, the



AHI Program Officer Michael Parkhurst participates
in *A Home for Everyone*’s Executive Committee
Photo courtesy of Multnomah County

countywide housing authority, service providers, business leaders, and members of the faith and philanthropic communities. The executive committee works with a coordinating board and policy-focused work groups whose members include service providers, people with lived experience of homelessness and advocates. Together they set priorities and make recommendations on local homelessness-related policies and investments. Meyer has represented the philanthropic sector on AHFE’s executive committee since its inception.

Meyer’s ongoing involvement with AHFE has enabled it to better understand the relevant issues and systems, and has helped to illuminate the role that philanthropy can play in moving forward policy and systems change. AHI funding has helped to advance AHFE’s policy conversations and support pilot projects that have shaped the strategic direction of AHFE’s policy priorities and system-level investments. These examples from 2017 demonstrate the role that Meyer’s funding has played in this process:

- Meyer awarded a technical assistance grant to **Enterprise Community Partners** in 2017 to support a summit on permanent supportive housing (PSH) that was co-convened by Enterprise and the Corporation for Supportive Housing (CSH). The summit brought together more than 60 leaders and stakeholders from AHFE, state and regional agencies, housing developers and social service providers. Experts from Los Angeles and Seattle shared strategies, and stakeholders participated in a “fishbowl” discussion with local elected officials, agency directors, and providers to discuss challenges and solutions to creating more PSH units. The summit shaped and galvanized support for the passage of a resolution by the Portland City Council and Multnomah County Commission directing the development of a plan to create at least 2,000 units of supportive housing in the next ten years.
- **Northwest Pilot Project** (NWPP) received AHI funding in 2015 for a demonstration project in partnership with Home Forward (the countywide housing authority) and the Urban League of Portland to prevent displacement by providing low-income households at risk of eviction with housing vouchers and support. The pilot was very successful, with all 60 participants able to remain in their apartment or neighborhood despite rapid gentrification and rent increases. In 2017, NWPP used the pilot’s success to advocate for the creation of a local long-term voucher program to prevent homelessness among renters on fixed incomes. AHFE’s partners embraced the idea, and the City of Portland and Multnomah County agreed to commit funding for 45 pilot vouchers that will fill the gap between participants’ monthly incomes and their monthly rent. Seeing the potential for a broader impact on policy and systems change, Meyer offered to fund implementation costs and an external evaluation and toolkit to support the strategy’s replication and scaling. Meyer’s investment will



Clyde, a long-term voucher pilot
project participant
Photo courtesy of NWPP

generate valuable data about the voucher program's impact, a blueprint for expanding the program in Multnomah County, and tools to support the model's replication in other Oregon communities.

- **Worksystems** is Multnomah County's workforce development agency and a member of AHFE's coordinating board. Recognizing the essential linkage between housing and employment, Worksystems created a pilot program in 2015 to provide rent assistance to job training participants in its Economic Opportunity Program (EOP) who were homeless or unstably housed. Meyer supported the pilot with an AHF grant that paid for a project manager with the capacity to evaluate the program's design and outcomes and represent the project at AHFE's Workforce and Economic Opportunity Workgroup. In the pilot's first year, the project manager presented early data to the AHFE partners showing that the program was working. In response, AHFE and its public partners committed additional funding to the program, enabling it to serve more than three times as many participants. An evaluation of the pilot's first 18 months showed that rent assistance recipients were 38% more likely to complete job training, 67% more likely to obtain career track employment, and increased their income at a rate of almost double that of a comparison group. Twelve months after the end of rent assistance, 76% of participants remained housed. The pilot results convinced the AHFE partners to prioritize the model, and AHFE is now working to develop a strategy for scaling it up.



Khalid, a recipient of rent assistance through Worksystems' EOP
Photo courtesy of Worksystems

Laying the Foundation for Systems Change

The AHF invests in research, innovation, evaluation and education to inform field-wide learning and lay the foundation for broader systems change. Through its grants and its role as a convener, Meyer also fosters efforts to bring together stakeholders to examine complex policy issues and develop shared solutions. Examples of this work from 2017 include:

- **Preserving Oregon's rent-restricted housing stock:** Housing Development Center (HDC) received an 18-month grant in 2016 (which was later extended to 21 months) for research, convening, policy development and messaging work to promote systems changes to support the long-term sustainability of Oregon's rent-restricted housing. In 2017, HDC presented a comprehensive analysis of data from the 19 portfolios involved in Meyer's Sustaining Portfolios Strategy to Oregon Housing and Community Services and other industry leaders. The analysis demonstrates the preservation challenges facing the state's existing affordable housing stock and explains the structural roots of the problems. HDC convened affordable housing practitioners and other experts in a Preservation Convening group to develop prioritized policy recommendations based on the findings. They also worked with a communications consultant to develop messaging strategies to build increased understanding and support for the need to address the state's preservation challenges. The Preservation Convening group has been working closely with other statewide policy groups to ensure the messaging strategies are vetted and used by a broad range of stakeholders.
- **Supporting manufactured housing as an affordable housing resource:** Meyer has prioritized the preservation of rural owner-occupied manufactured homes since the first AHF in 2008. This sustained support has contributed to a growing recognition of the importance of manufactured housing as a key component of the state's affordable housing strategy. Meyer has increased its investments in this area over the past two years in an effort to leverage this increased momentum. In 2016, Meyer awarded a two-year Housing Opportunities grant to NOAH to convene a statewide Manufactured Housing Policy Steering Committee and Manufactured Housing Peer Learning Collaborative to develop strategies to support long-term affordability and housing stability in Oregon's manufactured home parks. Meyer also

awarded funding to nine organizations to build the capacity of programs to assist low-income residents of manufactured homes with critical repairs. Recognizing that these grants by themselves will address only a fraction of the statewide need, Meyer worked with the grantees to design a third-party evaluation to document the impact of their work to support broader replication and scaling of effective programs.

- **Increasing the cost effectiveness of affordable housing development:** The AHI's Cost Efficiencies strategy promotes research and innovation to improve the cost-efficient delivery of affordable housing. In 2017, Meyer provided capital grants to fund the implementation of several innovative pilot projects testing out promising models for cost-effective development. Meyer also funded Earth Advantage (EA) to promote the adoption of a Life-Cycle Cost Analysis (LCCA) tool to support more sustainable and cost-effective affordable housing. The LCCA tool combines inputs regarding design and construction decisions with assumptions about energy savings, long-term maintenance and replacement costs to promote a more informed analysis of the true costs and benefits of design and construction decisions. Meyer's grant supports EA's work with developers and funders to refine the tool and promote its use throughout Oregon's affordable housing industry.



- **Increasing alignment between housing and healthcare:** The AHI's Systems Alignment strategy funds innovative models for fostering strategic coordination between housing and other service systems. One particularly promising area of work has been the pursuit of greater integration between housing and healthcare. In 2017, Columbia Gorge Health Council secured a commitment from the local Coordinated Care Organization (PacificSource) to utilize Medicaid health services funds to pay for housing supports through the Council's Bridges to Health Pathways program. This partnership offers a model that has the potential to create new funding streams for housing-related services

Building the Base for Advocacy

One of the AHI's key priorities is to strengthen the capacity of communities of color and underserved rural communities to engage in housing-related public policy advocacy and organizing. The AHI's advocacy grants have supported local and statewide organizing work that is building a broader base for housing advocacy across the state. To illustrate, here are some 2017 highlights from the work of several 2015 Advocacy RFP grantees:

Community Alliance of Tenants (CAT) engaged renters throughout the state along with a diverse group of allies in a campaign to end no-cause evictions in Oregon. While their efforts did not result in a legislative victory in 2017, their work brought significant attention to the issue and built a broad coalition to push for renters' rights and tenant protections. Meyer funding supported CAT's organizing in southern and rural Oregon. Highlights of this work from 2017 include:

- Mobilizing two dozen southern and rural Oregonians to travel more than five hours to Salem to meet with their legislators and testify at legislative hearings.
- Organizing Ashland and Medford residents to attend legislators' in-district town halls and other local events to advance a tenants' rights message.
- Conducting a coordinated multi-city press conference in Eugene, Medford and Portland with participation from tenants, advocates and local elected officials at each event.

- Engaging 70 diverse organizations across the state to support the campaign through the Stable Homes for Oregon Families coalition.
- Connecting with local coalitions and faith-based leaders in rural and southern Oregon to strengthen CAT's relationships in local communities and deepen support around tenant protections.

Immigrant and Refugee Community Organization (IRCO) was awarded a two year grant in 2015 to expand the diversity of voices in housing advocacy to address racial disparities related to housing and increase the availability of affordable housing for marginalized immigrant and refugee families. IRCO has worked to build the leadership of immigrants and refugees and engage them in housing advocacy by partnering with CAT, the Housing Alliance and the Welcome Home Coalition (WHC). In 2017, this work included:

- Partnering with CAT to hold a housing advocacy training with IRCO's leadership development program participants.
- Engaging IRCO's constituents in state-level advocacy on housing and tenants' rights by participating in the Housing Alliance's 2017 Housing Opportunity Day in Salem.
- Working with WHC to advocate for affordable housing resources in the Portland metro area, including testifying in front of the Portland City Council with other WHC members about the Portland Housing Bond and engaging in a strategic planning process for Metro's Housing Bond.



IRCO constituents participate in a housing advocacy training
Photo courtesy of IRCO

Unite Oregon received a two-year grant in 2015 to build a movement of statewide affordable housing advocates in immigrant, refugee, people of color, low-income and rural communities. Over the two-year grant, the project:

- Engaged 515 community members in Multnomah County, Washington County and the Rogue Valley in community-based research using surveys and other community input mechanisms to surface local affordable housing issues and identify potential policy solutions.
- Trained 245 immigrants, refugees, people of color, low-income and rural Oregonians to be housing advocates.
- Organized and mobilized 1,646 members to get involved in affordable housing advocacy at the state and local levels. In 2017, this included involving Unite Oregon members in the 2017 state legislative session, engaging Washington County members in local planning and zoning discussions, and engaging Rogue Valley members in successfully advocating for the inclusion of affordable housing provisions in the City of Talent's comprehensive plan.

Urban League of Portland was awarded a two-year grant in 2015 to organize Oregon's African American communities to improve access to affordable, accessible, culturally-appropriate and safe housing. Highlights of this work in 2017 include:

- Provided training, transportation and support for Black Oregonians to testify at state hearings during the 2017 legislative session about the need for rent stabilization and just cause evictions. Organized an



Urban League Lobby Day attendees
Photo courtesy of Urban League of Portland

Urban League Lobby Day with training for the more than 50 attendees on how to engage with their legislators around renter protections.

- Collaborated with the Coalition of Communities of Color on the *Rebuilding Communities* report, which identifies best practices for culturally-specific housing solutions. The report was used to underscore the need for renter protections during the 2017 legislative session and will be used again in the 2019 session.
- Led an effort to collect stories from applicants to the Portland Housing Bureau's N/NE Preference Policy to assess program barriers for historic Albina residents.
- Co-organized a housing listening session of Eugene-area residents and elected officials.

Welcome Home Coalition was awarded a two-year grant in 2015 to support its Leadership Academy. Over the grant period, the project:

- Engaged over 160 individuals in trainings on affordable housing history and policies, storytelling techniques and community organizing tactics.
- Co-hosted events with the Coalition of Communities of Color, Unite Oregon and IRCO to engage graduates from their leadership development programs in WHC's work and build ongoing relationships.
- Developed a Speakers Bureau to elevate the voices of community members in affordable housing discussions and WHC campaigns. Half of the 18 Speakers Bureau members are directly impacted by the affordable housing crisis and/or people of color.

Mid-Columbia Housing Authority received a one-year grant in 2015 to support the creation of a local network to address affordable housing issues in the Columbia Gorge. That grant seeded the development of a broad network of affordable housing advocates that includes employers, social service agencies, economic development interests and diverse residents. The network's achievements in 2017 included:

- Successfully advocating for the rezoning of a publicly owned parcel of land known as Lot 700 for an affordable housing development. The rezoning was a priority strategy in the network's 2015 policy recommendations for increasing the area's affordable housing.
- Introducing a proposed construction excise tax and successfully advocating with the City and County of Hood River to enact the tax. The tax will generate between \$300,000 and \$500,000 annually in additional revenue for affordable housing.
- Introducing a concept during the 2017 legislative session for a land acquisition program to address challenges that rural communities face in acquiring land for affordable housing. With advocacy support from the Housing Alliance and the Association of Oregon Housing Authorities, the concept was approved with bi-partisan support from legislators.



Advocates testify on rezoning Lot 700 for affordable housing at the Hood River City Council
Photo courtesy of Hood River News

Challenges and Lessons Learned

AHI grantees' efforts to move forward housing-related advocacy, policy and systems change have faced several persistent challenges:

- The deepening of Oregon's housing crisis has increased the momentum around affordable housing and renters' rights, resulting in policy wins that were unthinkable a few years ago. However, advocates are pushing against a tide of market forces and federal policy shifts that create ongoing challenges.
- The federal policy environment has been particularly complicated and unpredictable over the past two years, creating uncertainty across the housing industry.
- Affordable housing policy campaigns are frequently opposed by powerful interests with deep pockets, influential connections, and expertise in the policy-making process.
- Advocacy and policy change are long-term activities that require sustained capacity and investment. It can take years to develop leadership, build coalitions, shape public opinion and galvanize support for policy solutions. The slow pace of change can make it difficult to leverage the resources necessary to sustain this work over the long haul.
- Affordable housing advocacy is most successful when it elevates the voices and stories of people who are directly impacted by the issue. But engaging community members in an authentic way is a staff-intensive process that requires sustained investments in outreach, relationship building, leadership development and leadership support.
- Systems change is a complex and difficult process with numerous obstacles to success. Regulatory, legal and technical barriers along with bureaucratic inertia can all impede the process of reform. This can make change extremely slow and can make it difficult to demonstrate measurable results in the short term.
- In Oregon, few other funders besides Meyer are investing in this work. Meyer is actively engaged in trying to expand the involvement of local and regional foundations in funding affordable housing advocacy, but so far it continues to be the primary funder in this arena.
- Engaging grantees in shared learning and networking is key to broadening the impact of Meyer's funding. While Meyer has valued its opportunities to convene AHI grantees, it has struggled to find sufficient time and capacity to engage grantees at the level that it envisions. AHI staff hope to spend more time with grantees in the AHI's final years collecting and disseminating good ideas and best practices from across the state and giving them an opportunity to learn from successful work in other states. AHI staff will work with grantees to explore options for how to do this.



Urban League Lobby Day attendees
Photo courtesy of Urban League of Portland

Meyer's experience investing in AHI grantees' advocacy, policy and systems change work has also generated valuable lessons about how philanthropy can best support this work.

- Small grants can make a big impact in communities without existing advocacy capacity. This lesson led Meyer to restructure the Advocacy RFP in 2017 to provide a clearer path to funding for early base-building efforts. The RFP offered a two-tiered approach, with larger grants for existing coalitions and campaigns working towards specific policy goals, and smaller grants to support the initial work to develop and mobilize leaders.

- Providing predictable, long-term funding to key statewide organizations and coalitions helps to build the state's capacity for effective advocacy and policy change. This has been demonstrated through Meyer's multi-year support for OHPP and the Housing Alliance, and it led Meyer to continue its support in 2018 for multi-year directed grants to these organizations.
- Capacity building support for smaller, community-based organizing efforts is also essential for identifying local issues and needs, building leadership, and advancing local solutions. Community-based organizing also feeds into statewide campaigns, ensuring the campaigns are responsive to the experiences of populations across the state and providing a grassroots base for statewide advocacy.
- Meyer's support for pilot projects and policy research has played a key role in moving forward systemic change. Grantees and partners note that Meyer's willingness to fund cutting edge ideas has helped to seed new strategies and move forward innovative solutions that might have never gotten off the ground without Meyer's support.
- Actively engaging with the field and having a seat at the table with partners has helped Meyer to stay informed about the issues, systems and strategies at play. This has enabled Meyer to assess the most strategic use of its funding and to step in at key moments to advance important policy conversations through its support.
- Meyer could enhance its support of community-driven policy and systems change by using its own voice and platform to advocate for change. To date, Meyer has not developed a clear organizational perspective on specific policy priorities and solutions, but doing so in the future would allow it to play a more active role in this arena in ways that are consistent with its status as a private foundation.



*A Home for Everyone Executive Committee
Photo courtesy of Multnomah County*

Next Steps

In 2018, Meyer will continue to support AHI grantees working on advocacy, policy and systems change through a series of one- and two-year grants awarded in 2017. This includes 12 grants awarded through the 2017 Advocacy RFP, eight grants awarded through the 2017 Systems Alignment RFP, and continued funding for key backbone organizations and coalitions including the Oregon Housing Alliance, Oregon Housing Preservation Project and Community Alliance of Tenants.

Meyer will also use its role beyond grantmaking to move forward affordable housing advocacy, policy and systems change work. Meyer convened a Cost Efficiency Summit in January 2018 that brought together more than 150 leaders and experts to explore strategies to lower the costs of affordable housing development. The AHI team will leverage the ideas and momentum generated at the summit to advance this work over the upcoming year. Meyer also plans to convene AHI grantees to share best practices and lessons learned in an effort to expand the impact of effective pilot projects and advocacy efforts.