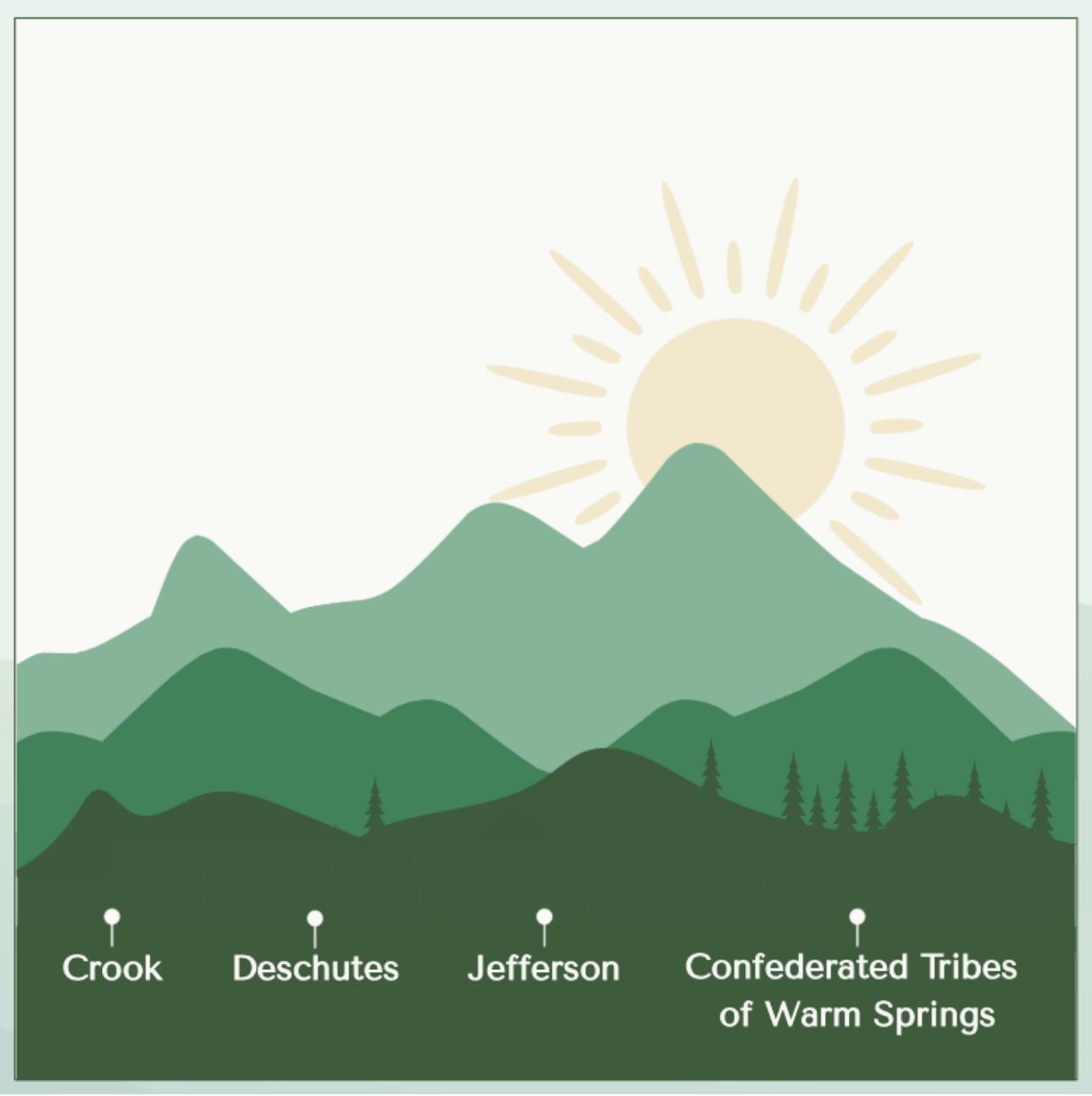

Central Oregon Strategic Plan to Address Homelessness & Housing Insecurity

Adopted by the Central Oregon Homeless Leadership Coalition
August 2026

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Central Oregon Strategic Plan to Address Homelessness & Housing Insecurity

EXECUTIVE SUMMARY

Central Oregon's housing market has long been a source of both pride and concern. Decades of escalating home values have generated wealth for those lucky enough to have owned property for any length of time. But the pace of increase in housing prices – especially rents – has dwarfed the rate at which incomes have grown, contributing to housing insecurity for an ever-growing segment of the population.

As with other west coast regions, the shortage of housing has contributed to high rates of homelessness and a deepening crisis for families, individuals, neighborhoods, and the organizations called to serve such vulnerable residents.

Fortunately, Central Oregon's homeless response system has made real progress in recent years. Between 2020 and 2026, substantial increases in federal and state funding allowed Crook, Deschutes, and Jefferson Counties and the Confederated Tribes of Warm Springs to expand shelter capacity and other interventions dramatically, helping drive a 19% decrease in the 2026 Point-in-Time count and a record 293 people re-housed between 2025 and 2026.

Yet demand remains stubbornly high: nearly 1,300 people were unsheltered at the time of the count, roughly 75% of them chronically homeless with multiple disabling conditions. The public investment that fueled recent gains is not expected to continue at the same scale, given the expiration of COVID-era federal funds and a more constrained state budget.

This Plan – developed at the behest of the Homeless Leadership Coalition – builds on a vision of a prosperous Central Oregon with ample housing for all that has been embraced by diverse, cross-sector leaders. The Plan is built on three pillars that are vital to Central Oregon's future success: Enduring, Unified Governance; Solid System Infrastructure; and Robust Continuum of Housing and Services. It recognizes the region's unique assets as well as threats and offers an actionable roadmap for promoting new home production even while making difficult decisions under reduced funding to effectively address the causes and conditions of homelessness with transparency and accountability.

INTRODUCTION

The Plan was developed by the Homeless Leadership Council (HLC) of Central Oregon and Central Oregon Intergovernmental Council (COIC) with assistance from Nexus Health Strategies. It is a multi-year strategic plan for addressing homelessness in Crook, Deschutes, and Jefferson Counties plus The Confederated Tribes of Warm Springs which fulfills a requirement of the US Department of Housing and Urban Development (HUD). Desiring to reach beyond HUD minimum requirements, HLC and COIC saw the need and opportunity to create a broad, actionable plan that incorporates avenues to increase housing supply overall and capitalizes on the growing public interest in issues surrounding homelessness and housing affordability.

The Plan provides an environmental scan, an overview of housing market dynamics, and paints a picture of the systems' strengths, opportunities, and vulnerabilities. It describes how significant increases in public funding drove expansion of shelter and other programmatic interventions between 2020 and 2026, and how rapid deployment of new resources meant more people than ever gained safety off the streets and access to stable housing.

The 2026 Point-in-Time count documents these important gains. After several years in which the number of people experiencing homelessness increased, 2026 saw a 19% decrease. Moreover, a record 293 people were re-housed between 2025 and 2026 – evidence that the substantial public investments built critical safety net housing infrastructure where little had previously existed.

That said, the demand for services remains stubbornly high, and as of the time of the count, nearly 1,300 people remained unsheltered. An estimated 75% of this unsheltered population is chronically homeless and suffering multiple disabling conditions including serious mental illness and substance use disorders.

In other words, the hardest to house, the most acutely ill, the costliest to treat and house, and the most likely to die prematurely if they remain outside.

HLC leaders, while celebrating the PIT results, are clear-eyed about the challenges ahead. The unprecedented public funding that led to 2026's gains will not be sustained, given expiration of COVID-era federal dollars, and a much more limited State budget. The Plan's purpose, therefore, is to articulate a unified future vision for a prosperous Central Oregon with ample housing for all; to provide an actionable roadmap for making tough decisions in an environment of reduced funding; to address homelessness with transparency and accountability; and to actively support and amplify efforts to accelerate housing production as well as access to behavioral health treatment and recovery services.

Process

A combination of qualitative and quantitative analyses were used to assess the effectiveness of the region's homeless system, and test opportunities for improvement. Dozens of interviews were conducted with knowledgeable individuals. A plethora of past and current local, regional, and state planning documents related to housing and homelessness were reviewed.

Findings were presented to various groups, including the Regional Housing Council, the Coordinated Houseless Response Office, the Multi Agency Coordinating Group, HLC Board and general membership, and more, gathering feedback and reactions. Three half-day workshops were held with distinct groups where possible strategies were discussed and debated amongst participants. Feedback and learnings from each workshop were built into successive sessions.

In April, a draft strategic framework was produced which was reviewed in a series of open meetings, focus groups, and additional one-on-one interviews. These discussions informed successive iterations of the draft framework.

Participants at multiple levels voiced agreement with the strategic plan elements, including the organizing pillars, strategic objectives, initiatives, and measures of success. That said, additional work is required to address critical outstanding issues. These are discussed more fully in the Recommendations section of the Plan.

Acknowledgements

The development of the Plan was guided by a planning team consisting of the following subject matter experts, which met frequently to provide feedback and advice throughout the nine-month process.

Eliza Wilson, HLC Chair and Executive Director, Rooted Homes
John Lodise, HLC Vice Chair and Executive Director, Shepherd's House Ministries
Autumn Camreta, Director of Housing, Neighbor Impact
Gwen Jones, Central Oregon Health Council
Alex Canales, Central Oregon Youth Action Board

Staff support was provided by members of the COIC housing team:
Mickie Derting
Robyn Badura
Rosie Laurie

As noted above, this Plan is the culmination of hundreds of hours of meetings, interviews, workshops, and focus groups with an incredible array of interested and committed Central Oregonians. From public servants to faith-based non-profits; homebuilding business executives to behavioral health workers; elected officials to those with recent lived experience of homelessness. These individuals and organizations brought unique stories, perspectives, and wisdom that informed the structure and content of this plan. Appendix 1 includes the full list of contributors.

Nexus Health Strategies Senior Advisors Margaret Van Vliet and Mike Bonetto provided process design and facilitation, subject matter expertise, and development of all materials.

CURRENT STATE | HOW WE GOT HERE

Housing access, affordability, and rates of homelessness in Central Oregon are influenced by the confluence of long-term economic trends, demographic shifts, and the public policy landscape. This section of the Plan provides an overview of those trends and how they have shaped the current state.

1. Housing costs have outpaced population growth by two to three times over the past decade

Central Oregon has long been one of the fastest-growing regions in Oregon and on the West Coast. The three-county population grew 22%[1] over the past decade — with the City of Bend as its epicenter.

Even as the region continued building — Deschutes, Crook, and Jefferson Counties issued roughly 25,900 residential building permits between 2016 and 2025[2] — housing costs grew far faster than the population that supply was meant to serve. HUD's Fair Market Rent for a two-bedroom apartment climbed from 39% to 45% across the region since 2020 alone.[3]

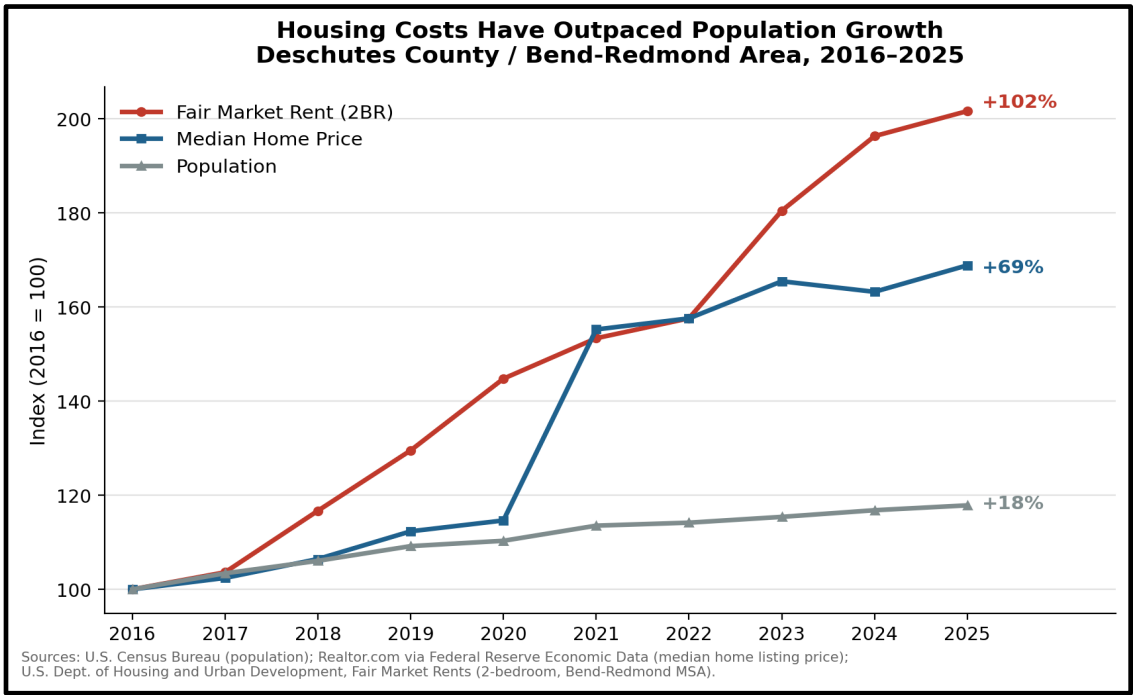

Figure 1: Housing costs vs. population growth, Deschutes County / Bend-Redmond area, 2016–2025

[1]U.S. Census Bureau, American Community Survey and Population Estimates Program.

[2]U.S. Census Bureau, Building Permits Survey, Deschutes, Crook, and Jefferson Counties, OR, 2016–2025.

[3]U.S. Department of Housing and Urban Development, Fair Market Rents, Central Oregon service areas, FY2020–FY2025.

The longer-term trend is even more striking: an analysis of Freddie Mac's housing price index by ResiClub found that Bend's home prices have grown 982% over the last forty years — the fastest of any metro area in the country.[4]

The pace has only accelerated recently. Between 2020 and 2025 alone, Bend's median home price rose 69% to $725,000. Crook and Jefferson Counties saw comparable surges — 59% (to $475,000) and 51% (to $385,000), respectively.[5] Across every measure — rents, home prices, and long-term appreciation — the region's housing costs have grown two to three times faster than its population over the same period, even with new construction continuing throughout. That persistent gap points to a market where new supply isn't landing at the price points or in the hands of the households who need it most.

2. Incomes have not kept pace, pushing more working families, seniors on fixed incomes, and single adults into precarious housing or homelessness

Cost burden — the share of income spent on housing — is the clearest link between market conditions and housing insecurity, and even the pre-pandemic baseline was alarming: as of 2017, over half of renters in Deschutes County (52.8%) and nearly half in Crook (47.2%) and Jefferson (46.2%) Counties were paying more than 30% of their income toward rent and utilities.[6]

That gap has almost certainly widened since 2017, though full post-pandemic cost-burden estimates aren't yet available given American Community Survey (ACS) reporting lags. Rent and income trends point the same direction: in Deschutes County, HUD's Fair Market Rent for a two-bedroom apartment rose 96%, from $827 to $1,623 a month, between 2016 and 2024, while median household income grew just 63% over the same period, from $61,248 to $99,705.[7]

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[4]ResiClub analysis of the Freddie Mac House Price Index, 40-year metro-area home price appreciation. See Appendix 2.

[5]Beacon Appraisal Group / Central Oregon Regional Multiple Listing Service (RMLS), median home sale prices, 2020–2025.

[6]The Bulletin, “Mapping Rent Burden in Central Oregon,” citing 2017 American Community Survey data.

[7]U.S. Department of Housing and Urban Development, Fair Market Rents; U.S. Census Bureau, Small Area Income and Poverty Estimates (SAIPE), Deschutes County, 2016–2024.

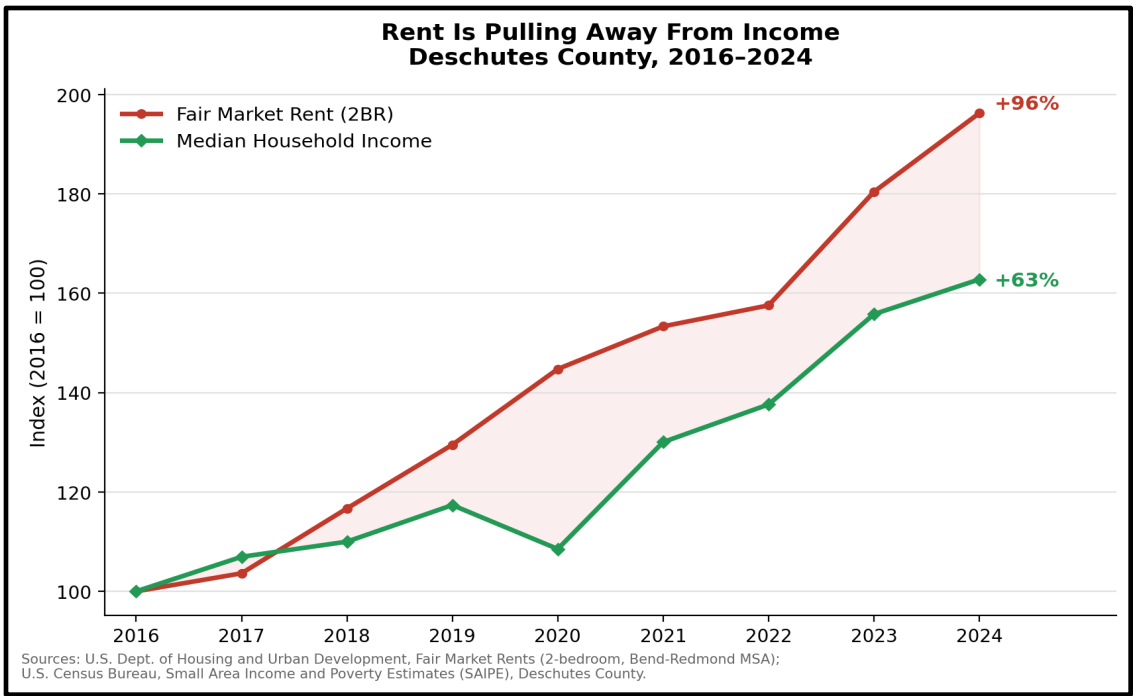

Figure 2: Rent vs. income growth, Deschutes County, 2016–2024

Rents are pulling away from incomes, and that widening gap is the core driver of worsening cost burden across the region. For households already spending a third or more of their paycheck on rent, even solid income growth is no match for the pace of rent increases — leaving a growing share of working families, fixed-income seniors, and poor individuals one setback away from losing their housing altogether.

3. Severity of homelessness and housing insecurity during COVID prompted substantial new federal, state, and local government investments to help communities strengthen their systems of care.

Public dollars from all levels of government enabled rapid expansion of the region's homeless response system. Most notably, Oregon Governor Tina Kotek declared a state of emergency on homelessness in Central Oregon and other regions of the state (Executive Order 2302), unlocking new state funding streams and requiring creation of the Multi-Agency Coordination (MAC) Group, described further below, to guide investment of those funds.

In response, area providers scaled their operations significantly, providing emergency shelter, outreach, rent assistance, case management, housing navigation, and even permanent supportive housing. Strengthened coordination between jurisdictions within Deschutes County in particular played a role in siting and funding shelter resources including safe parking, sheltering pods, and traditional congregate shelters. Emergency

shelter capacity nearly tripled in recent years, driven by motel conversions, new congregate shelters, and safe parking programs. Permanent Supportive Housing (PSH) and other permanent housing also expanded, though far more modestly relative to documented need.

PROGRAM TYPE	2020	2021	2022	2023	2024	CHANGE
Emergency shelter	242	172	249	419	628	+159%
Transitional housing	96	110	84	84	91	-5%
Permanent Supportive Housing	201	193	118	133	142	-29%
Rapid Re-Housing	109	96	47	67	70	-36%
Other Permanent Housing	--	--	63	150	150	N/A
Grand total (year-round)	648	571	561	853	1,081	+67%

Figure 3: Central Oregon bed inventory by type, funded through HUD and OHCS

It should be noted that shelter and other interventions often receive funding from alternative sources, such that the total count of such beds exceeds what is reported by HUD and Oregon Housing and Community Services (OHCS). For example, the City of Bend's shelter bed count stood at 591 in February 2026, as reported by City officials. This is because some beds and related programs receive funding from state agencies including Oregon Youth Authority, Department of Corrections, Oregon Health Authority to serve specific populations. In addition, some long-standing organizations like Bethlehem Inn and J Bar J supplement their work with charitable donations and philanthropic grants. See Appendix 3 for a total count of beds within Bend's city limits.

Taken together, new programs, beds, organizations, and an expanded safety net for people who are housing insecure or experiencing homelessness helped hundreds of individuals and families access safe sheltering and other emergency supports. As noted above, the 2026 Point-in-Time count of homeless individuals fell by an impressive 19% for the region for the first time in many years.

CURRENT STATE | THE CHALLENGES AHEAD ARE REAL

As detailed above, Central Oregon's system of care – the coalition leaders, decision-makers, providers, and front-line staff – successfully and rapidly deployed significant new sources of funds. People and organizations recognized the magnitude of suffering and unmet need and responded in ways that meant more vulnerable people than ever received assistance.

At the same time, those leaders, deciders, providers, and staff engaged over the past year told remarkably consistent stories of where system challenges exist. The six major obstacles described in the following pages set the stage for the needed work ahead.

1. **Governance and decision-making are fragmented,** mostly as an artifact of new funding sources from the State of Oregon that mandated specific representation on advisory bodies.

   As shown in Figure 4, the region's homelessness challenges are currently addressed by multiple bodies, each establishing its own priorities and directing resources under its control in diffuse ways. To be clear, there is widespread recognition of a need to align the various efforts, but for a variety of reasons, such alignment has been difficult to achieve.

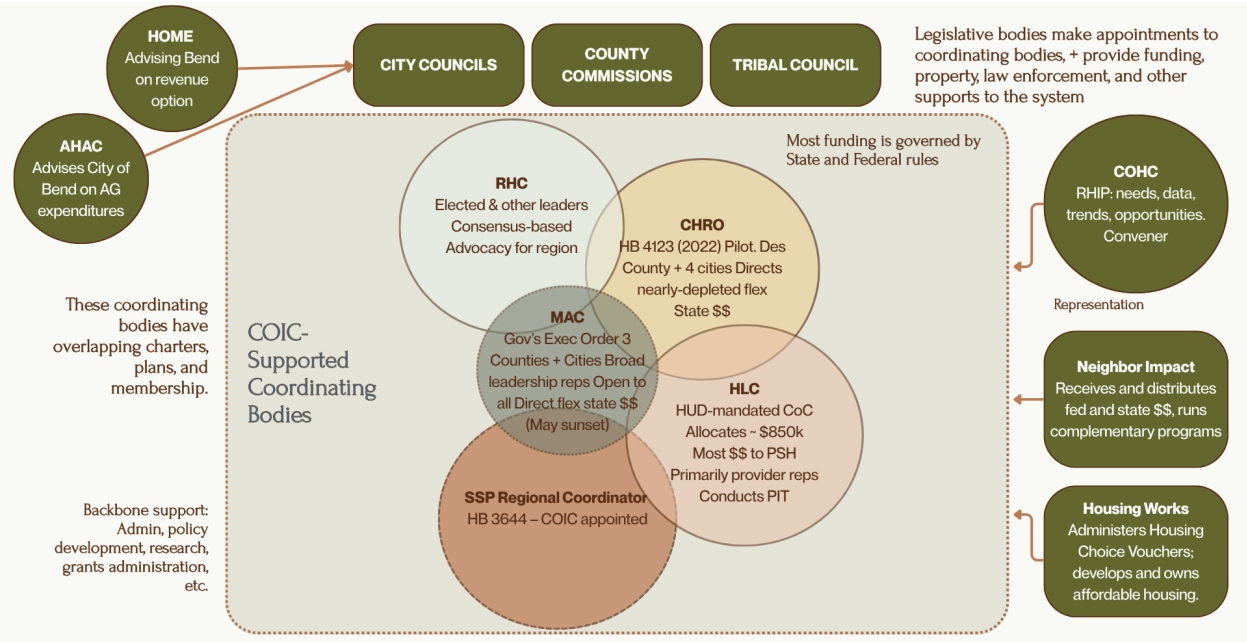

Figure 4: graphic depiction of the current state of governance of the homeless and affordable housing systems in Central Oregon.

COIC: Central Oregon Intergovernmental Council	**MAC:** Multi Agency Coordinating Group
RHC: Regional Housing Council	**SSP:** Statewide Shelter Program
CHRO: Coordinated Houseless Response Office	**COHC:** Central Oregon Health Council
HLC: Homeless Leadership Coalition	*See Appendix 4 for a description of each body*

The current state assessment found that this array of governing and oversight tables at which separate but related decisions are made contributes to duplication, overlap, and confusion about which body is "in charge."

(Insofar as these various entities have assumed responsibility for specific streams of funding, the way in which public monies flow is also worth noting and is discussed below in section 4.)

These dynamics matter not least because without a cohesive and coordinated strategy for tackling homelessness, or a shared understanding of what interventions are most effective, decision-makers charged with investing public funds inevitably resort to granting dollars to organizations with which they have some familiarity and confidence. In turn, service providers chase dollars from multiple jurisdictions or governing coalitions that use diffuse criteria and timelines, consuming valuable time that could be deployed on mission-critical activities.

> *Service providers talked about the fear of missing any meetings of any of the established groups because sometimes new funding or new criteria gets discussed and they can't afford to miss out on any opportunities.*
>
> *Interviewees echoed this fragmentation directly:*
>
> *"There are so many jurisdictions… no one is managing this fully."*
>
> *"No one wants to own responsibility; it's a game of hot potato."*
>
> *And, more simply: "too many meetings!"*

2. **Lack of accessible, reliable data** means those on the front lines can't always tell what services their clients may have used already; nor can program managers confidently direct resources where they are most needed. Leaders end up making decisions that are not based on effectiveness of interventions. A self-reinforcing cycle means that some outreach and other workers may skip data entry altogether because it's time-intensive and does not actually help them do their jobs.

   As a region, Central Oregon's data quality score[8] falls far below the HUD requirement of 95%, averaging 67% in recent years, and rising to 73% at the most recent milestone. Besides the failure to meet federal expectations, across-the-board data irregularities impede effective use of resources, undermine accountability for dollars spent, and contribute to public skepticism. More concerning, poor data integrity makes it difficult

[8] A "data quality score" measures the **accuracy, completeness, consistency, and timeliness** of information entered into HMIS. It does **not** measure the quality of services being provided. Rather, it evaluates whether client records meet established data standards.

for leaders to know with confidence which interventions are working, which means dollars aren't always used as wisely as they could be. The dynamic also puts the region at a disadvantage when competing for scarce funding.

Regional practitioners have made some attempts to address these shortcomings, but the need to ramp up service delivery has consumed time and energy of providers and others within the system. A data dashboard for the region was recently made public (see Figure 5), representing an important step towards building transparency, and a baseline on which to begin monitoring outcomes.

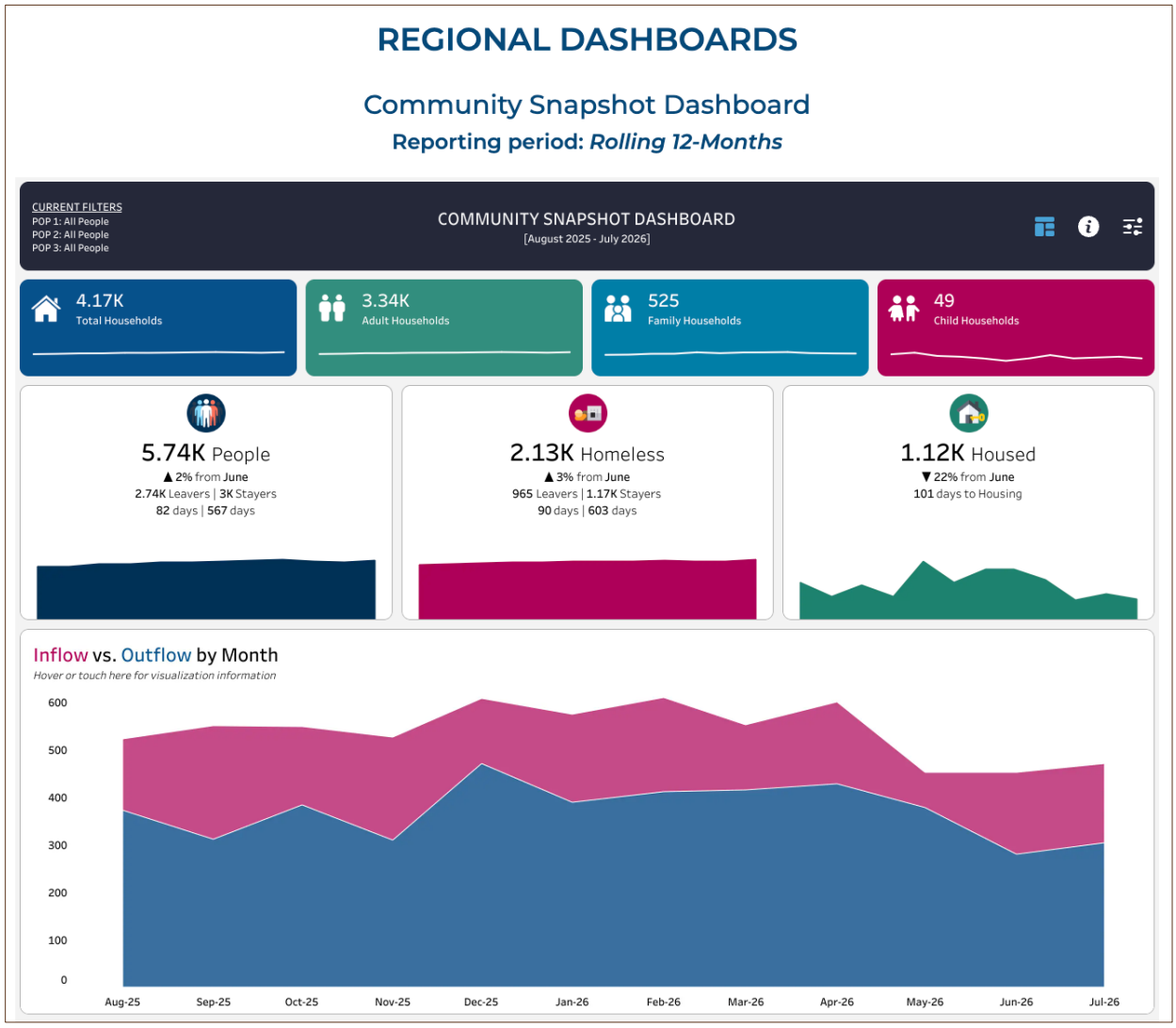

Figure 5: Snapshot of Regional Dashboard as of 8/4/26

3. **Service provider capacity is inconsistent,** a phenomenon observed in other jurisdictions in the Pacific Northwest. The region benefits from some long-term, highly competent non-profit and quasi-governmental organizations that were able to scale

their operations when new funding and demand for service both increased dramatically. By contrast, some previously informal coalitions and faith-based groups reliant on volunteers organized as non-profits more recently in response to the immense unmet need and availability of new funds. The new energy and activism for sheltering, feeding, and caring for people experiencing homelessness has helped countless individuals and families to stabilize.

Unfortunately, not all such newly formed groups possess the capacity to fully account for dollars spent and households stabilized. Often, they remain "scrappy" organizations, still reliant on an army of volunteers and people working for relatively low wages. In that context, consistent and accurate data entry into the Homeless Management Information System (HMIS), and full compliance with all requirements associated with the use of federal or state dollars is a stretch.

> *"Several of the service providers grew out of church basements for all the right reasons, and they may not have staying power when funding declines."*

4. **Unstable funding and a pending fiscal cliff** represent key concerns for providers and partners throughout the region.

   For years, annual public funding for the region's homeless response system was effectively limited to the roughly $800,000 the Continuum of Care (HLC) received each year in HUD grants. That changed starting in 2021, as federal ARPA dollars and new state funding streams — HB 4123 in 2022 (which created CHRO), Governor Kotek's 2023 executive order (which created MAC), and SB 5511 in 2025 — layered on top of the HUD baseline and drove a rapid, multi-year expansion of shelter and services capacity.

   As Figure 6 below shows, combined federal, state, and local public investment in Central Oregon's homeless system rose from roughly $9.6 million in 2021 to a peak of $43.3 million in 2024, before falling back to $29.3 million in 2025[9]. Current projections show that decline continuing sharply through 2028, driven by the expiration of ARPA and other one-time federal dollars and a more constrained state budget — a roughly 73% drop from the 2024 peak. This is the fiscal cliff referenced throughout this Plan, and it is

[9] *Estimates; figures not audited and may not reflect all public sources. Sources include HUD reports and information provided by COIC, Redmond, Bend, and Madras city staff, and Deschutes County.* ***See Appendix 5*** *for a complete explanation of data sources used.*

the central reason the Plan emphasizes clear prioritization, durable local funding, and better data on what interventions are worth sustaining.

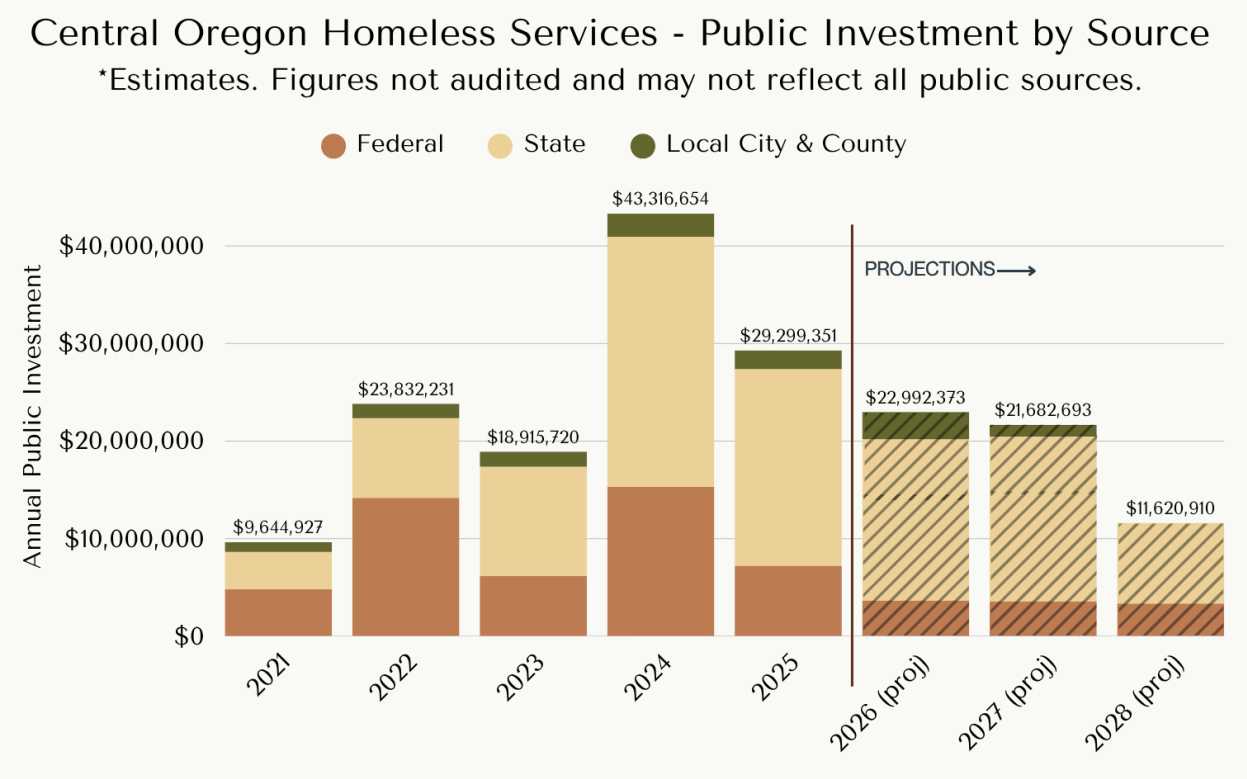

Figure 6: Homeless services — annual public investment by source, 2021–2028 (2026–2028 are projections).

The imminent drop in resources is exacerbated by the ways in which all the new sources of funds that arrived since 2021 have been administered. As depicted in figure 7, funding flows themselves have been – and remain – fragmented and thus inherently less efficient than they could be. This phenomenon is not unusual in the housing stabilization realm and leveraging or "braiding" of various sources is to be expected to some degree. That said, this Plan aims to set the conditions for improved data-driven decision-making, aligned decision criteria, and coordinated policymaking.

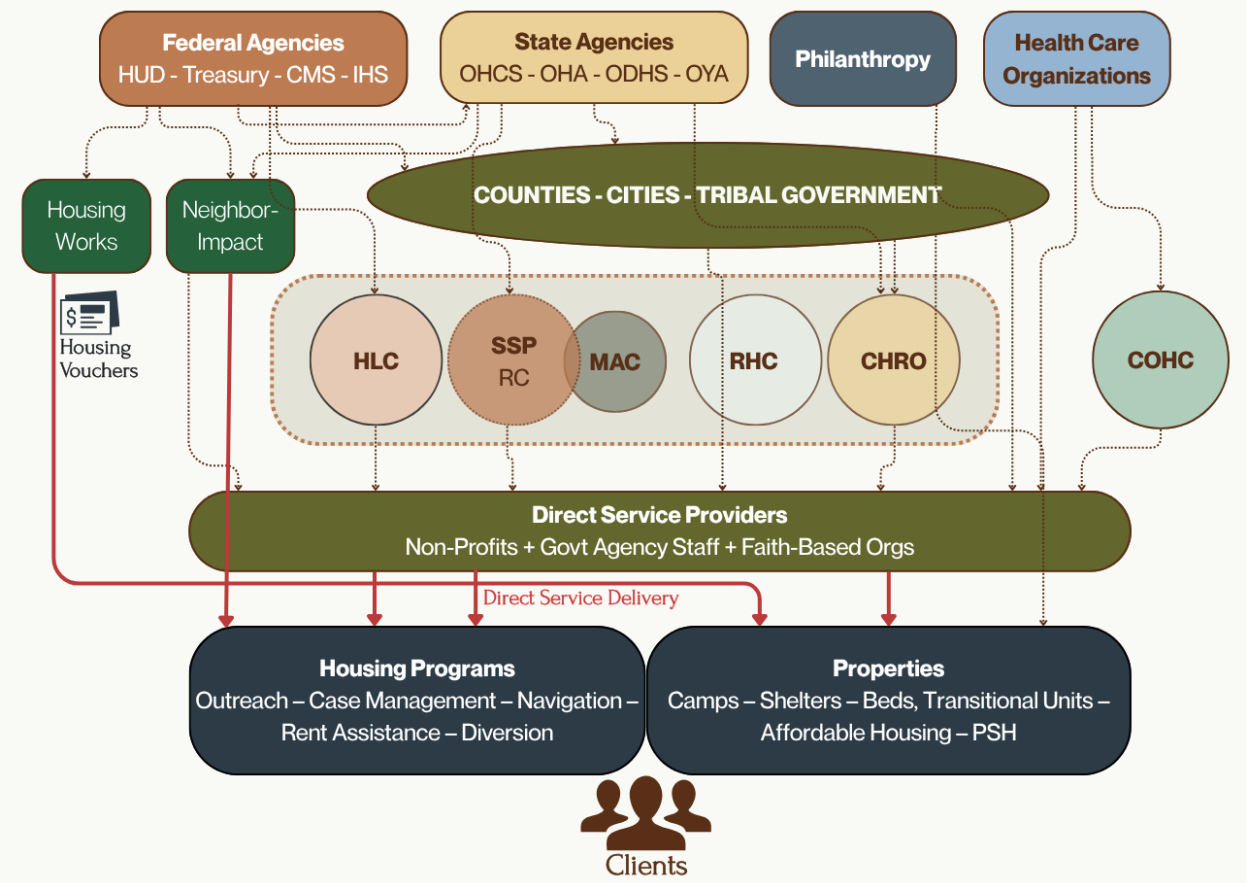

Figure 7: graphic depiction of the ways in which funding flows from federal and state agencies, philanthropy, and health care organizations flow are fragmented.

5. **Gaps exist in the continuum of housing options,** which means competition for affordable rental homes is fierce for low-wage working families, seniors and people with disabilities on fixed incomes, and other housing insecure residents. It also means that those staying in shelters are effectively stuck, as placements into permanent housing can take months.

   Gaps were found in availability of safe living options for those exiting shelter who've been homeless for extended periods and have multiple disabling conditions that prevent them from complying with standard rental lease terms. This subset of the vulnerable population could stabilize if they receive adequate treatment, care, and ongoing recovery supports. Permanent Supportive Housing, or PSH, intends to serve this population, but the requisite behavioral health care is not consistently available.

6. **Clients suffer as a result.** Front-line staff described a system stretched too thin to do more than react. As one outreach worker put it, *"it's hard to track people after I first make contact."* Another described the day-to-day reality more bluntly: *"staff are just putting out fires all day with no capacity to think strategically."* A third acknowledged

how thin housing prospects can discourage even basic data entry: *"sometimes I don't put their information into [Coordinated Entry] because I know they'll never get housing."* The composite client journey below illustrates why: for someone with multiple disabling conditions who is unwilling or unable to accept a shelter bed, nearly every path forward runs into a resource that is scarce or unavailable.

Most importantly, the very people for whom the expanded safety net programs are designed often face a dizzying array of interactions with first responders, hospital ERs, and referrals to services that are in short supply or do not exist.

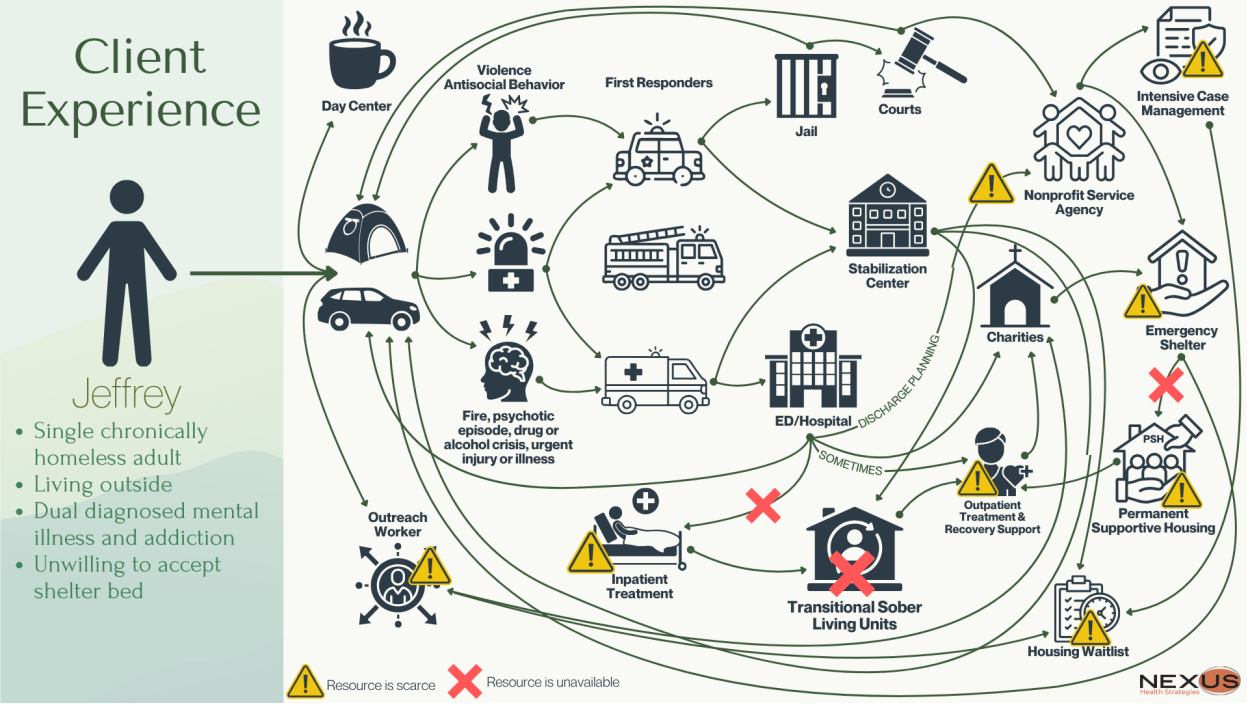

Figure 8: graphic depiction of the typical experience of a chronically homeless individual with multiple disabling conditions.

STRATEGIC FRAMEWORK FOR ACTION

Broad recognition of the challenges outlined herein – especially the projected decline in public resources – gives rise to consensus agreement that the status quo cannot be sustained, and that the challenge ahead is knowing which practices to carry forward, and which need to adapt.

The framework starts with a ***vision of an economically prosperous Central Oregon where everyone has access to safe, stable housing and the support they need to thrive.***

HLC recognizes that by itself, it has only limited ability to achieve such an aspirational vision. It therefore invites a larger coalition of jurisdictions, providers, funders, and policy makers to work collaboratively on a ***joint mission to create a seamless continuum of housing by working together to solve complex challenges that are too big for any one jurisdiction to address by itself. We convene the region to align resources, coordinate services, and advocate for the housing and support systems needed to end homelessness in Central Oregon.***

HLC Vision:

An economically prosperous Central Oregon where everyone has access to safe, stable housing and the support they need to thrive.

HLC & Partners' Joint Mission:

To create a seamless continuum of housing by working together to solve complex challenges that are too big for any one jurisdiction to address by itself. We convene the region to align resources, coordinate services, and advocate for the housing and support systems needed to end homelessness in Central Oregon.

PILLARS THAT ANCHOR THE PLAN, ACTIVATE OUR MISSION, AND MOVE US TOWARDS OUR VISION		
FOUNDATION Enduring, Unified Governance What holds it.	ENABLER Solid System Infrastructure What powers it	OUTCOME Robust Continuum of Housing & Services What we deliver.
WHAT IT MEANS		
Central Oregon leaders share a common vision of a prosperous region with ample housing for all.	Central Oregon will have the data systems, resources, and provider capacity to effectively serve vulnerable households.	Central Oregon residents will have access to a complete continuum of housing options and support services.
DESIRED FUTURE STATE		
By 2030, our system of care will show increased measures of housing stability thanks to a credible and unified governance structure that uses available resources effectively in pursuit of a common vision and purpose.	By 2030, we will have built an effective data and service coordination infrastructure that helps direct investment decisions, ends homelessness for more families and individuals, and provides the foundation for garnering new resources to sustain the system.	By 2030, every person experiencing or at risk of homelessness in Central Oregon can access the specific housing and support services they need through a coordinated, client-centered system that emphasizes warm hand-offs, and residents at all income levels benefit from a range of housing choices.

Strategic Plan Details

Having achieved broad agreement on this Strategic Framework, including the desired state, HLC intends to work with regional partners to activate the initiatives that will bring the plan to life.

HLC adopted this plan, including the objectives and initiatives, in August 2026. More work will be required to agree on metrics, to ensure lead organizations are well-positioned to assume assigned responsibilities, and to implement tracking mechanisms – reports and communications – that can demonstrate progress and signal if adjustments need to be made. That work will carry forward through the Fall of 2026 and into 2027.

PILLAR	STRATEGIC OBJECTIVES	MEASURE (examples)	INITIATIVES
FOUNDATION Enduring, Unified Governance	**Improve Governance & Leadership Clarity**	*Completed*	Governance Summit
	Strengthen Regional Collaboration	*Leaders engaged*	Governance Task Force
	Communicate Shared Vision Consistently	*Shared messaging*	Communications Plan
ENABLER Solid System Infrastructure	**Build a Credible, Reliable, Timely Data System**	*Regional dashboard adopted*	Data Summit Data Task Force
	Secure Consistent Resources	*Resources Secured*	Resource Development Plan
	Strengthen Provider Organizations	*Performance data TBD*	Use Improved Outcome Data to Identify Opportunities for Improvement as time permits
OUTCOME Robust Continuum of Housing & Services	**Maintain – then Grow – System Capacity**	*Performance data TBD*	Use Improved Data to Target Resources
	Redouble Efforts to Prevent Homelessness	*Diversion measures*	Activate CCP prepared by YAB
	Increase Housing Supply & Resident Choice	*Vacancy rates*	Support & Amplify Existing Efforts (PAH, etc.)
	Improve Access to Behavioral Health Care	*Client acuity*	Support & Amplify Existing Efforts of Counties, Tribe, and other BH Providers

Additional detail on Initiatives, including lead and supporting organizations, is provided in Appendix 6.

CONCLUSION & IMPLEMENTATION CONSIDERATIONS

HLC, COIC, and their partners undertake this work because a cohesive, well-implemented regional plan delivers benefits that a fragmented system cannot: understandable and evidence-based strategies; coordinated service delivery; data-driven interventions; public trust and credibility; a compelling, unified legislative agenda; the ability to leverage multiple funding sources; and, over time, measurable improvements in educational attainment, health outcomes, public safety, and economic prosperity across the region.

It's a critical time and the stakes are high. Systems change of the type imbedded in this Plan is extremely challenging even under the best of circumstances. The pace of change needs to be calibrated to the readiness of agencies and leaders to adapt. Uncertainty about future funding means rigorous analysis of tradeoffs will be required, on the assumption that cuts to current service levels are unavoidable. Moreover, whatever governance structure emerges should be durable enough to withstand leadership changes over time, both elected and administrative.

Appendix 1

Plan Contributors by Organization

Bend Chamber, Emily Boyd
Bend Redmond Habitat for Humanity
Bend Redmond Habitat for Humanity
Bethlehem Inn, Jared Arzaga
Bethlehem Inn, Michael Hancock
Business Roundtable, Cheri Helt
Cascades East Assn of Realtors, Morgan Greenwood
Central Oregon Health Council, Gwen Jones
Central Oregon Villages, Scott Jones
City of Bend, Amy Fraley
City of Bend, Eric King
City of Bend Mayor, Melanie Kebler
City of Bend Council Mayor Pro tem, Megan Perkins
City of LaPine Mayor, Jeannine Earls
City of Madras, Nick Snead
City of Redmond, Linda Cline
City of Redmond Council, Kathryn Osborne
City of Redmond Council, Cat Zwicker
City of Sisters Council President, Sarah McDougall
Central Or Builders Association, Garrett Mosher
Crook County Commission, Susan Hermreck
Crook County Commission, Seth Crawford
Crook County Public Health, Katie Plumb
Deschutes County, Kara Cronin
Deschutes County Behavioral Health, Colleen Thomas
Deschutes County Commission, Phil Chang
Deschutes County Sherriff, Neil Marchington
First Light Recovery Collective, Lorenzo Perez
First Light Recovery Collective, Kanaan Kanaan
Fuse Housing Collaborative, Colleen Sinsky
Hayden Homes, Jenn Kovitz
Hayden Homes, Deb Flagan
Housing Works, Lynne McConnell
J Bar J, Stephanie Alvstad
J Bar J, Keith Riggs
Jefferson County Commission, Seth Taylor
Jefferson County Faith Based Network, Truett Shilling
Jefferson County Public Health, Katie Russell
Jericho Road, Don Senecal
Mosaic Medical, Elaine Knobbs
Mosiac Medical, Lindsey Stailing
Mountain View Community Development, Rick Russell
Neighbor Impact, Carly Congdon
Neighbor Impact, Scott Cooper
Neighbor Impact, Molly Heiss
Neighbor Impact, Autumn Camreta
Northwest Housing Alternatives, Clayton Crowhurst
Oasis Village, Josie Mize
Reach Out Central OR, Stacey Witte
Redemption House, Cindy Burbank
Redemption House, Jennifer Woods
Rooted Homes, Eliza Wilson
Shepherd's House Ministry, Gina Stout
Shepherd's House Ministry, John Lodise
Shepherd's House Ministry, Nicole Merritt
Sisters Habitat for Humanity, Peter Hoover
State of Oregon, Governor's Office, Scott Aycock
State of Oregon, OHCS, Liz Weber
Warm Spring Housing Authority, Danielle Woods
Warm Spring Housing Authority, Lisa Lomas
Youth Advisory Board, Alex Canales
Youth Advisor Board, Kira Aki

Appendix 2

40-year shift in single-family home prices between April 1986 and April 2026

Among the 385 metros historically tracked by Freddie Mac, these 25 metros saw the biggest 40-year jump in nominal home prices

Rank	Metro area housing market	40-year home price shift
1	Bend, OR	982%
2	Bellingham, WA	933%
3	Bozeman, MT	889%
4	Seattle-Tacoma-Bellevue, WA	887%
5	San Jose-Sunnyvale-Santa Clara, CA	808%
6	Mount Vernon-Anacortes, WA	807%
7	Coeur d'Alene, ID	790%
8	Corvallis, OR	787%
9	Portland-Vancouver-Hillsboro, OR-WA	773%
10	Eugene-Springfield, OR	747%
11	Missoula, MT	741%
12	San Diego-Chula Vista-Carlsbad, CA	733%
13	Albany, OR	728%
14	Salem, OR	712%
15	Grand Junction, CO	703%
16	Naples-Marco Island, FL	699%
17	Salt Lake City-Murray, UT	698%
18	Kahului-Wailuku, HI	693%
19	Traverse City, MI	690%
20	Los Angeles-Long Beach-Anaheim, CA	689%
21	Olympia-Lacey-Tumwater, WA	687%
22	Bremerton-Silverdale-Port Orchard, WA	678%
23	Boise City, ID	676%
24	Charleston-North Charleston, SC	673%
25	Santa Cruz-Watsonville, CA	665%
	U.S. national aggregate	456%

Table: Lance Lambert • Source: ResiClub analysis of the Freddie Mac House Price Index

ResiClub

Appendix 3

City of Bend Shelter Bed Count

Organization Name	Shelter Name / Location	Population Served	Low or High Barrier	Total Beds
		Families	High Barrier	34
Bethlehem Inn	3705 N Hwy 97	Adults	High Barrier	112
Stepping Stone	2346 NE Division St	Mix	Low Barrier	56
Franklin Avenue Shelter	154 NE Franklin Ave.	Mix	Low Barrier	70
St. Vincent's Place	Cleveland	Adults	High Barrier	10
Central Oregon Villages	62125 NE Benson Way	Mix	High Barrier	25
Central Oregon Villages	Dean Swift	Mix	High Barrier	9
Bend Heroes Foundation/COVO	Poe Sholes	Veterans	High Barrier	22
Safe Parking - Central Oregon Villages	Bend UMC	Mix	High Barrier	2
Safe Parking - Central Oregon Villages	Franklin & 5th	Mix	High Barrier	8
Safe Parking - MVCD	Westside	Mix	High Barrier	4
Safe Parking - MVCD	County Safety Campus	Mix	High Barrier	9
Safe Parking - MVCD	Community of Christ	Mix	High Barrier	0
Safe Parking - MVCD	S. Hwy 97	Mix	High Barrier	9
Safe Parking - REACH	Antioch	Mix	High Barrier	3
Safe Parking - REACH	Unitarian	Mix	High Barrier	4
Safe Parking - REACH	Nativity	Mix	High Barrier	8
Safe Parking - REACH	Nazarene	Mix	High Barrier	4
Cascade Youth and Family Center	Century Drive, The LOFT	Youth (ages 14-24)	Low Barrier	18
Cascade Youth and Family Center	Grandmas House	Youth (families parent	Low Barrier	14
Cascade Youth and Family Center	Host Homes	Youth (ages 14-24)	Low Barrier	10
Saving Grace		DV	Low Barrier	20
The Lighthouse Navigation	275 NE 2nd St.	Mix	Low Barrier	100
Shepherd's House	Division Street Men's Programs	Men	High Barrier	30
Shepherd's House	Abi's House	Women & children	High Barrier	10
			Total	**591**
Tiny Homes / Cabins / Pallet				
Safe Parking - Vehicles				
Safe Parking - Pallets				
Hotels/Motels				

Appendix 4

Primer on Key Bodies

Regional Housing Council (RHC): COIC created RHC to strengthen the region's response to housing and houselessness needs in Central Oregon by exchanging information including approaches and lessons learned, identifying shared priorities, and serving as a regional voice in providing feedback to state agencies. Its purview encompasses the entire housing continuum, from homelessness to homeownership.

Coordinated Houseless Response Office (CHRO): Created in response to HB 4123 (2022) as a pilot for Deschutes County and the four incorporated cities within to operationalize coordination, anchored by city-county partnerships, to strengthen their communities' homeless response. The office was designed and funded on a limited duration basis to identify gaps, provide coordination, improve communication, and facilitate strategic visioning across jurisdictions. Deschutes County initially provided backbone administrative support for the "office," but those duties were eventually transferred to COIC in 2024.

Homeless Leadership Coalition (HLC): The region's HUD-required Continuum of Care (CoC), comprised of providers of shelters and other services to people experiencing homelessness. Recently added elected officials and law enforcement. Up until 2022, HLC's administrative backbone responsibilities were handled by Neighbor Impact.

Multi Agency Coordination (MAC) Group: A requirement of EO 2302, in which Governor Kotek declared a state of emergency in Central Oregon (and other regions) and required that a group distinct from the HLC be established to guide investments of certain streams of State funds. The State designated COIC to provide administrative support to MAC. Insofar as MAC is no longer technically required by the State, COIC announced in July 2026 that it was ending its convening of the group.

The Statewide Shelter Program (SSP) Regional Coordinator represents a new dynamic within the system. In 2026 Oregon Housing and Community Services changed its method for distributing some homeless assistance dollars, designating local entities to serve as Regional Coordinator. COIC was designed to serve as RC by the State. In this capacity, COIC received delegated authority from OHCS to allocate specific resources ($10.2 million for the current biennium) to regional entities that meet state requirements.

Appendix 5

Central Oregon Housing and Homeless System Strategic Plan

Trends in Public Funding for Homeless Services

SOURCE	2021	2022	2023	2024	2025
FEDERAL	$4,844,927	$14,182,517	$6,196,592	$15,296,791	$7,224,801
STATE	$3,800,000	$8,168,914	$11,182,779	$25,633,926	$20,157,857
LOCAL	$1,000,000	$1,480,800	$1,536,349	$2,385,937	$1,916,693
TOTAL	$9,644,927	$23,832,231	$18,915,720	$43,316,654	$29,299,351

Federal Sources: HUD Continuum of Care (CoC), American Rescue Plan Act (ARPA), HUD Youth Homeless Demonstration Program (YHDP), Indian Housing Block Grant and Competitive Grants, and CDBG Public Services. Does not include Housing Choice Vouchers, VASH, CDBG, HOME, or Community Services Block Grant.

State Sources: Legislative appropriations and Executive Order funding directed to the region (HBs 4123, 5019, 5006; SB 5511) and Oregon Housing and Community Services (OHCS) Awards for addressing homelessness. Does not include other agencies (Youth Authority, Corrections, Human Services, Health Authority), nor does it include other OHCS sources (SHAP, ESG, LIFT, LIHTC, GHAP).

Local City and County Sources: General Fund. Does not include donations of owned property, the value of tax abatements, or dedication of staff time for public safety, infrastructure, planning, public works, parks, or general administration.

All figures obtained by Nexus Health Strategies through federal and state funding dashboards plus media reports and confirmed by relevant pass-through jurisdictions and COIC fiscal staff. Amounts have not been audited and are not intended to represent precise or total accounting of all resources directed towards alleviating homelessness. For example, treatment of administrative and staffing costs may vary between jurisdictions receiving and administering funds; and some sources were received and spent over multiple years.

Readers needing precise fund accounting should independently verify

Appendix 6

Detail of Adopted Plan Initiatives

Pillar 1: Enduring, Unified Governance

Objectives:

1.1 Improve Governance & Leadership Clarity
1.2 Strengthen Regional Collaboration
1.3 Communicate Shared Vision Consistently

Initiatives 1.1.1 and 1.1.2

A. Housing and Homeless Leadership Summit – Co-convened by HLC and COIC; COIC provides backbone support

1. HLC Board, with the administrative and logistical support of COIC, to convene a Leadership Summit with broad representation from ecosystem partners and stakeholders.
2. Purpose: review lessons learned from organizing and convening work of the last 5 years; identify areas of agreement within the HLC-adopted Strategic Plan between and amongst regional elected officials; set the table for a productive Governance Task Force.
3. Outcome: Consensus on the framework/charter of a Governance Task Force. Identification and consensus of a subset of individuals to serve on an interim Governance Task Force to develop recommendations related to the guiding principles, representation, structure, and decision-making authority, etc. of a new or existing body(ies).
4. COIC engages strong, professional facilitation so all others can fully participate.
5. Invite Tribe, cities and counties (elected and administrative officials) to designate representation, ideally to include public safety and public/behavioral health in addition to housing-related staff.
6. Invite main anchor/long-term safety net institutions and housing developers
    a. Housing Works, Neighbor Impact, J Bar J.
    b. Others: Best Care, Mosaic, Fuse, St. Charles, PacificSource (?) EDCO, Bend Chamber, Hayden Homes, Ppl with lived experience
    c. Make sure there are providers working across all three counties (so include Redemption House)

B. Governance & Leadership Task Force – COIC provides backbone support

1. 90 –120-day duration (TBD)
2. Representation identified at Summit
3. Organized and convened by COIC as neutral, regional partner
4. Charge is to deliver recommendations to Summit attendees and others re:
    a. Structure for region-wide decision-making, information-sharing, and conflict resolution

b. Roles and responsibilities for future bodies
    i. HUD-required CoC (HLC) functions must be retained
c. Scope of authority for allocating public funds other than CoC
d. Endorse and/or adopt the Regional Strategic Plan
e. Recommend optimal role(s) for COIC vis-a-vis a future structure to be proposed
    i. Convener, backbone administrative, funder, SME, connector, informer, etc.
f. Adopt standards for what representation on any newly formed body entails (representing self or the home institution, and what that means for requirements for voting)
g. Recommend working agreements and communications protocols

5. Tribal council, city councils, and county commissions to formally receive recommendations for moving forward
6. Jurisdictions may opt out of participating in any newly formed body.
7. These recommendations would form the basis of eventual MOUs and/or IGAs

C. Transition to new structure – Established leadership structure(s) guide; COIC provides backbone support

Initiative 1.3.

Secure funding to develop a communications plan and produce basic tools to aid messaging consistency

Established leadership structure(s) guide; COIC may provide backbone support

Pillar 2: Solid System Infrastructure

Objective 2.1 Build a Credible, Reliable, Timely Data System

Initiatives 2.1.1 and 2.1.2

A. Data Summit – Leadership and backbone support clarified at Summit

1. HLC Board, with the administrative and logistical support of COIC, to convene a Data Summit with representation from ecosystem partners and stakeholders. Seek sponsorship and participation through OHCS, and possibly others
2. Purpose: review and gain a common understanding of challenges associated with data reporting irregularities; gain consensus that strengthening data system is in everyone's interest
3. Outcome: Consensus on the framework/charter of a Data Task Force. Identification and consensus of a subset of individuals to serve on an interim Data Task

Force to develop recommendations related to an overall approach to for data governances; consistent and ongoing user support; development of a prototype unified dashboard with successive levels of detail for policy-makers, program managers, and front-line workers; propose high-level success metrics for HLC and the broader community to track performance over time.

4. HLC to Invite: All users of HMIS strongly encouraged (incentivized?) to attend – from front-line workers to program managers, and decision-makers
    a. Format to include presentations on how data integrity can help organizations and the system overall; demonstrations of quality systems.
    b. Highlight Bend dashboard - is this what we want?

B. <u>Data Task Force</u> – Leadership and backbone support clarified at Summit

1. 90 –120-day duration (TBD)
2. Representation identified at Summit
3. Organized and convened by COIC, with outside facilitation
4. Charge is to deliver recommendations to [Summit attendees?] re:
    1. How to optimize existing systems
    2. Recommended approach to and resources for data governances
    3. Framework of a prototype unified dashboard with successive levels of detail for policymakers, program managers, and front-line workers
    4. Proposed high-level success metrics for HLC and the broader community to track performance over time

<u>Objective 2.2</u> <u>Secure Consistent Resources</u>

A. <u>Resource Development Plan</u> – Newly established leadership guides; COIC backbone support

1. Build off exploratory work done by the City of Bend, and by COIC at the behest of CHRO, to develop options for resource development that can be handed off to eventual governance structure.
    a. Dependencies: Data, communications, staff resources at COIC.

<u>Objective 2.3</u> <u>Strengthen Provider Organizations and Front-Line Workers</u>

A. <u>Build Provider Capacity</u> – *DEFERRED* – TBD on leadership and support

1. As an outgrowth of Data Summit, and as time permits, create a library of free and low-cost resources for organizations desiring to improve operational performance.

Pillar 3: Robust Continuum of Housing & Services

Objective 3.1: Maintain – and then grow – system capacity

A. Maintain essential services as much as possible

1. In light of declining public resources, use existing outcome and utilization data to maintain programs that most clearly demonstrate effectiveness at moving people towards stability and independence.

B. Grow capacity of system to address unmet needs – DEFERRED; TBD on leadership and support

1. As reliability of outcome and cost data improves, continuously evaluate resource allocation options
    a. Build in flexibility to adjust to changing circumstances
    b. Consider the use of "system mapping" analytics to provide insights into program capacity and utilization and identify where most significant gaps exist AND where excess capacity could be shifted.
    c. Establish ongoing performance review mechanisms to facilitate course corrections as circumstances change seasonally and over time.

Objective 3.2: Redouble Efforts to Prevent Homelessness

A. Deploy more prevention services – Newly established leadership guides; COIC backbone support

1. Evaluate opportunities to build on and activate the 2024 Coordinated Community Plan (CCP) prepared by the YAB.
2. For adult populations, as time permits, use improved data to affirm effectiveness of short-term rent assistance and other housing stabilization tools that effectively keep people housed.

Objective 3.3: Increase housing supply and resident choice

A. Support Existing Efforts – Newly established leadership guides; COIC backbone support

1. Support and amplify the efforts of Partners for Affordable Housing to accelerate housing production, using its adopted Policy Toolkit.
2. Formally request that RHC affirmatively amplify and support policy changes sought by non-profit affordable housing developers.

Objective 3.4: Improve access to behavioral health care

A. <u>Support existing efforts</u> – Newly established leadership guides; COIC backbone support

1. Support and advocate for initiatives of COHC, BestCare, Mosaic, as well as county and tribal public health officials to increase access to treatment and recovery services for all vulnerable populations.
    a. HLC to invite key representatives to discuss needs, approaches, and the ways in which HLC may be able to support.