



# Local Housing Solutions

## Gaps and opportunities in the provision of education, training, and technical assistance on local housing policy

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Local housing policy plays a critical role in ensuring the affordability and quality of housing in U.S. cities. Among other roles, local governments and public housing agencies establish the zoning policies that determine what (and how much) can be built in which locations, administer a wide range of federal, state, and local programs that create and preserve dedicated affordable rental housing and support homeownership, set and enforce housing codes to ensure housing meets quality standards, and establish policies to increase residential stability by preventing evictions and foreclosures.

The development and implementation of a local housing strategy is a complex endeavor, requiring the coordinated actions of multiple agencies within each city, including the housing department, planning department, zoning board, buildings inspection department, local department of taxation and the public housing authority. To manage these complexities, many local governments seek out education, training and technical assistance, which are provided by dozens of different organizations.

### Impacts of COVID-19

All of the provider interviews conducted for this study were completed prior to the spread of COVID-19 in the United States. The interviewees' perspectives shared in this study therefore do not reflect changes in the housing policy and provider ecosystem that have occurred due to the pandemic, such as a switch to virtual engagements and an increased focus on emergency federal funding, eviction moratoria, and short-term rental assistance. A brief scan of a number of provider websites reveals that each has a page dedicated to COVID-19 and housing, including resources related to evictions, rental and mortgage assistance, and advocacy efforts on the state and national level.

Overall, the urgent housing and technical assistance needs associated with the pandemic reinforce the importance of collaborative approaches to resource development and TA engagements.

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To inform discussions of how this education, training and technical assistance could be strengthened, this white paper examines the different ways education, training, and technical assistance (TA) on local housing policy are provided to local governments, identifies gaps in the delivery system for these services, and proposes options for strengthening the overall delivery system. As described more fully in Appendix A, the paper is based on a series of ten interviews Abt Associates conducted in February and March 2020 with providers of education, training, and technical assistance on local housing policy (providers) and an environmental scan Abt performed of organizations that provide these services. The accompanying Annotated Provider List describes and provides the website addresses of the providers we reviewed for the environmental scan.

In October 2020, Abt Associates and the NYU Furman Center facilitated a virtual convening to discuss how to strengthen the provider ecosystem so that local governments and other local stakeholders have the information and tools needed to develop more effective local housing strategies. Convening participants included a mix of: (a) providers of education, training, and TA on local housing policy, and (b) funders, policy experts, and others with a strong interest in strengthening the overall ecosystem of supports for local housing officials and practitioners. The convening included opportunities for participants to react to a first draft of this white paper and offer ideas on how to strengthen the provision of housing-related education, training, and TA to local practitioners and policymakers. Participant input from the convening is incorporated throughout this updated version of the white paper.

The following are the key takeaways from this research and convening:

- Local governments face many obstacles in the development of a comprehensive set of multi-faceted housing strategies, such as a lack of staff capacity and knowledge of local housing conditions, insufficiently supportive state and regional policies, and fragmented responsibility for developing and implementing housing policy among various local government agencies that do not always collaborate closely. Convening participants agreed there is a need for greater coordination among local stakeholders – both within local government and across the government and non-governmental sectors. The convening participants also noted that there were often duplicative planning processes undertaken by different agencies and stakeholders in the same community.
- The need for meaningful community engagement is often overlooked or undervalued in the process of creating and implementing local housing policy.
- The field should focus on promoting greater diversity among the individuals providing TA, training and education to include people of color with lived experience within the communities being served.
- It is important that TA providers not begin engagement with localities with predetermined solutions. Providers regard direct TA to localities as an important supplement to static tools and training materials and believe it is especially valuable (a)

when specifically tailored for local housing markets, such as when it is informed by analysis of local data and with input from the community, and (b) to address common capacity challenges faced by local governments, such as a lack of a deep understanding of the complexities of development finance.

- When providers engage directly with localities, learnings from those engagements are rarely captured and shared across providers or directly with localities, which likely hinders the accumulation of knowledge on how to design and implement effective local housing policies among providers and localities.
- Most of the providers with whom we spoke expressed support for more intentional sharing and promotion of one another's work, convening more regularly as a field, and exploring opportunities to collaborate in the future. Convening participants were in strong agreement about the need for more opportunities for peer-to-peer sharing among TA providers. Collaboration could take many shapes, from lower-intensity efforts to share knowledge to higher-intensity efforts to work jointly on developing educational and training products or coordinating TA engagements. Many convening participants expressed a desire to know what other providers are working on, and where, to help avoid duplication of effort on substance, initiatives, or geographies.

This research is part of a broader set of activities that Abt Associates and the NYU Furman Center are conducting to help cities, towns and counties develop comprehensive local housing strategies, including the website LocalHousingSolutions.org and a peer city housing network. Based on guidance from the National Community of Practice on Local Housing Policy, Abt and the NYU Furman Center developed LocalHousingSolutions.org to provide information and guidance on local housing policy to interested stakeholders, which include local government staff and officials, providers of education, training and technical assistance, and others with an interest in the topic. While no one from Abt or the NYU Furman Center was formally interviewed for this research, the recommendations draw on insights gleaned through our shared work on LocalHousingSolutions.org as well as the ideas proposed by providers in interviews and during the convening.

We have organized this white paper as follows:

- First, we describe challenges reported by providers of education, training and TA on local housing policy.
- Second, we describe the ways in which the interviewees believe providers can most effectively deliver education, training, and TA to local governments.
- Finally, we explore potential ways to strengthen the overall ecosystem of education, training, and TA on local housing policy.

## **Challenges to developing effective local housing strategies and providing education, training and TA on local housing policy**

The interviewees identified a number of challenges that local staff and officials face developing effective local housing challenges as well as challenges faced by providers of education, training, and TA on local housing policy:

### **1. City staff, elected officials and housing advocates often have a limited understanding of the housing development process and the full array of local housing policy options.**

- While staff capacity is high in a number of localities, in many others, local government staff are pulled in too many directions and/or lack deep experience with housing policy.
  - Localities, especially small ones, often do not have enough data or the capacity to analyze data well enough to understand local housing needs. Convening participants expressed a need for easier and more standardized ways to measure progress quantitatively, such as developing metrics for assessing racial equity in housing.
  - Many local government staff and nonprofits involved in housing-related work do not have a good understanding of how to measure progress in addressing housing needs.
  - Many local governments lack staff capacity to understand development finance and negotiate successfully with developers.
- Efforts to build staff capacity is continually threatened by staff turnover.
- Frequent turnover of elected officials creates an ongoing need to provide baseline education on housing, including the economics of development, to newly-elected officials. Elected officials' lack of knowledge makes it difficult for them to effectively evaluate positions advocated by different constituencies and can lead to inaction by policymakers.
- Often, the policy toolbox considered by elected officials is too narrow and not fully representative of the available options. It is essential that local governments have baseline knowledge of housing policy options in order to choose and pursue effective policies.
- One interviewee stated that the housing-related positions of local advocates and activists are often not grounded in economic realities.

### **2. Local governments need to adopt local housing strategies that are comprehensive, but face many obstacles which can lead to the adoption of only a limited set of isolated policies; as a result, many housing strategies are too narrow to be highly effective.**

- Local practitioners and policymakers involved in developing and refining housing strategies often have specific expertise in some but not all elements of housing policy, or have specific policies or strategies they prefer to focus on, which can result in housing strategies that are not comprehensive.

- Local governments often focus heavily on one potential solution rather than considering the need for a range of solutions. In some cases the policies they identify are not the right solutions for their unique problem.
- Responsibility for developing housing policy is generally split among many different local government agencies, but many cities, towns and counties struggle to effectively integrate the work of these different agencies. There is rarely an overarching mechanism for encouraging collaboration and ensuring accountability, and in many communities, there is no tradition of strong collaboration across these separate agencies. A key part of the local housing policy infrastructure, public housing authorities, generally operate independently from the city or county government.

**3. Insufficiently supportive state and regional policies can pose obstacles to the development of effective local solutions.**

- In some localities, elected officials do not have the authority under state law to enact needed changes. These barriers hinder the work of adopting new housing policies and creating affordable, sustainable housing development. Even the most capable local government staff cannot overcome ill-advised state policies that limit local control of housing and may pre-empt local efforts to enact source-of-income nondiscrimination, inclusionary zoning, and rent control policies.
- Some interviewees noted that regional approaches are key to addressing the housing crisis. It is not sufficient or sustainable, they argued, for one locality to adopt a plan in isolation from neighboring localities that impact its housing market. The lack of discussion of housing needs among neighboring cities and lack of regional planning for affordable housing can lead to cities ignoring housing needs in hopes that neighboring localities will address the need.

**4. The need for meaningful community engagement is often overlooked or undervalued in the process of creating and implementing local housing policy.**

- A number of interviewees expressed concern that their work with local clients did not include any or sufficient engagement with community advocates and residents. Some also noted a lack of funding to engage community groups in a meaningful and sustained way. Convening participants stressed that providers cannot do a good job if all the information they receive is filtered through government officials.
- One interviewee emphasized that the field needs to better recognize the importance of bottom-up policymaking in order to reduce the reinforcement of race-based power dynamics that have helped create the inequities in housing faced today.

**5. Some providers of education, training and technical assistance try to address complex challenges with a limited set of strategies that are not tailored to local context and market conditions.**

- Some consultants tend to stick to what they know and thus recommend their favored policies regardless of the locality in which they are working.
- One interviewee felt that technical assistance providers often limit their recommendations to what is politically expedient in a locality.
- There is a lack of collaboration among providers that could use their complementary skills and expertise to help local governments address challenges in a more comprehensive manner.

**6. Two interviewees stressed that while housing-related challenges are often structural in nature, providers tend to treat them as technical challenges that can be addressed with incremental solutions. According to these interviewees:**

- The field needs to recognize that the housing crisis is rooted in historical inequality and racial inequities. Alongside community members, providers should work to identify solutions to structural discrimination in the economy, educational system, criminal justice system, and housing market.
- The field should encourage bold, ambitious efforts that are necessary to address affordability challenges, such as raising taxes, rather than incremental change.
- There is a need for anti-racism training for TA providers and consultants, along with education about the historical intersection of race and land use policy.

**Effectiveness of modalities for providing education, training, and TA on local housing policy to local governments**

The wide array of resources available to local governments, while valuable for the breadth and depth of information, may reflect a duplication of effort across the providers and produce barriers to local governments that need information on and assistance with local housing

In the environmental scan, we observed many vehicles through which providers assist local governments:

- Providers share **educational resources** through best practice databases, case studies, data-mapping tools, newsletters, policy development toolkits, research publications, and webinars, among other resources. Many of these resources explain the basics of federal housing programs, the importance of understanding local housing market conditions, and profile policies that create or preserve affordable housing.
- **Trainings** are provided mostly through online certification programs or directly to local government staff on-site or at conferences, and are usually more focused on program implementation than policy development.
- The **TA** offered by providers is primarily in the form of group TA, in which the provider organization serves as a convener or facilitator of task forces, affinity groups, or communities of practice related to specific issues or based on shared local conditions, such as localities struggling to address displacement due to rising rents. Less common are short- or long-term direct TA assignments in which a provider builds the capacity of an individual local government to develop new housing policies or enact changes to existing policies.

policies. From the environmental scan, we observed two potential inefficiencies for the field to address. First, **some providers create duplicative resources** to help localities understand federal housing programs, local market conditions, and affordable housing policies. Second, despite some redundancy across providers' resources, **information on housing policies is nevertheless scattered** across the field of providers. A user searching for information to develop comprehensive housing policies will likely need to visit multiple providers' websites to find the information they need – and may not be aware of all the providers with information available on local housing policies.

Beyond these overarching challenges, our interviews with providers revealed that they perceive certain modalities or approaches to providing education, training, or TA to local governments as more effective or more preferred by local governments than others. In the balance of this section, we highlight what providers regard as effective modalities for assisting local governments.

**1. Providers generally agreed that there is value in offering a wide range of information, tools, and materials on local housing policy to local practitioners and policymakers, but these materials in and of themselves are not sufficient to lead to transformative change. Additionally, certain tools or processes that would be helpful to localities in addressing housing-related challenges are missing.**

- There is a need for tools and content to be more interactive so that they are more accessible and contextual for end users. For example, a report on a specific policy option might be enhanced by adding questions that help readers determine if the policy is appropriate or feasible to implement in their locations. There is a place for static materials and toolkits for certain audiences such as researchers and public officials, but more tailored and interactive implementation materials are needed for the staff who design the program or policy.
- There is no library of housing related policies that would allow one locality to search for and read the text of policies that other cities have adopted. Resource libraries often do not provide the level of specificity any individual locality needs to develop a full-blown policy; they also run the risk of losing their value over time if they are not regularly updated.
- There is no sustained and structured avenue through which municipal staff in one city can have discussions with their peers in other cities about the process for implementing certain policies.

**2. The right modality depends on the circumstances and audiences.**

- One provider indicated that monthly webinars are popular among its members, but that there is no “one size fits all” modality for its engagements and thus it makes other modalities available to its members, such as reports and toolkits. The right approach to engaging with local governments will vary according to its staff’s capacity.

- Another interviewee noted the importance of getting information out through the right mechanism at the right time – at times that might mean producing a memo or directing local government staff to a website while at other times convening peer cities to discuss a challenge.

**3. Several providers spoke to the value of in-person engagements with local governments, especially when sustained over time and tailored to local conditions.**

- The providers that work closely with local governments in sustained engagements believe their access to and the involvement of senior staff or elected officials during an engagement was an important factor in successfully addressing localities' challenges.
- Providers that deliver the most long-term and in-depth consultation to local governments spoke to the value of being able to work with local data to help their clients understand their challenges and ask the right questions to address those challenges.
- Local governments with lower levels of in-house capacity can especially benefit from sustained, in-person assistance based on a deep assessment of local needs. Higher capacity local governments, though, may be able to make progress from a one-time training.

**4. Most providers we interviewed stressed that local governments appreciate opportunities for learning from peer cities.**

- Peer learning enables local governments to learn about different policies being implemented in other locations and helps local government staff understand why another local government chose a certain policy, how they implemented it, the (unexpected) problems they faced, and how successful it has been.
- One provider believed the most effective training method was convening staff from different local governments – or staff from different departments within one local government– to learn from one another in a setting that allows them to step away from their day-to-day duties.
- Personal connections made among peer learning participants can lead to local governments staying in touch after an engagement ends.
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**5. Personal connections made among peer learning participants can lead to local governments staying in touch after an engagement ends.**

- One provider believes trainings are better when they include a local government representative who can speak to work done in her community related to the training topic.

**6. Several providers feel there is value to serving as a trusted source of information for their constituents or an objective convener of stakeholders working to address local challenges.**

- A few providers believed a strength of the field is its work developing and cataloguing a wide range of objective and value-neutral policy solutions that local governments can choose among according to its priorities, along with sharing examples of policies that have worked in certain localities.

**Options for strengthening the ecosystem of education, training, and TA on local housing policy for local governments**

Drawing on the suggestions of interviewees, and based in part on the study team's experience as a provider, the following are some potential approaches to strengthening the overall ecosystem of education, training and TA on local housing policy. These ideas would benefit from further discussion among providers as well as among municipal officials. Planned conversations with local governments regarding their needs for TA, training, and education were postponed due to the COVID-19 crisis and thus their critical perspective is missing from these suggestions.

**Nearly all interviewees expressed support for collaborating more regularly and intentionally.** Several of the providers mentioned that they already work with other providers on the ground, refer to resources other providers make available, and participate in events hosted by other providers. Nearly all providers expressed support for future collaboration and information sharing with other providers (though one organization cautioned that it has to protect its nonpartisan reputation by avoiding close partnerships with advocacy organizations). Some interviewees noted a tension between the desire to collaborate with other providers and the competition inherent in fee-for-service work, but generally believed there is enough work for providers to share.

Collaboration could take many shapes, from efforts to better share knowledge among providers and local governments to working jointly on developing products or participating in TA engagements. Many of these efforts would likely require additional staff time and funding to implement. Some would require a sustained commitment of multiple providers to work together or work in new ways, along with a provider's willingness at times to defer to the expertise of another provider. To advance the field, it will be important for providers to grapple with each of these potential challenges.

Below, we explore potential options for the field of providers to consider to address gaps and challenges in providing education, training and TA to local governments on local housing policies, beginning with options that would not require providers to work in substantially

different ways, and ending with options that would represent a significant change in the field's collective efforts. These options are the outcomes of a brainstorming exercise based on the input provided and do not necessarily reflect a specific recommendation by the authors.

### ***Increase knowledge sharing among providers and with local governments***

1. Periodically ***convene providers to discuss trends*** affecting local housing markets, best practices in assisting local governments, and the effectiveness of policies recently enacted by local governments.
  - These convenings could result in determining key gaps in existing knowledge and practices or emerging trends for which the field should collaborate to develop new content. Topics could include, for example, helping cities respond to the COVID-19 crisis, training providers on how to incorporate a racial equity lens in their work, or assisting local governments in adopting regional solutions to housing challenges.
2. Regularly ***share lessons learned from engagements*** with other providers.
  - The lessons learned could include those related to a housing-related challenge that were addressed, but also those related to how the TA or training was delivered and whether recipients regarded it as effective or not.
  - Lessons learned could be shared in various ways, such as by short written summaries, panels or workshops at convenings, more detailed case studies, or via conference calls or webinars. Regardless of the format, the lessons learned should be archived in a central repository and made available to providers and the public.
3. ***Disseminate lessons learned from an engagement with one local government to other local governments.*** The format for sharing could be similar to those for sharing lessons learned with other providers, such as case studies or webinars, but tailored specifically for local government staff or elected officials. The lessons learned could:
  - Be short and concise for busy elected officials
  - Include information to help local governments understand the extent to which their needs and market conditions are comparable to the local government that received the TA or training
  - Describe the policy options the recipient local government considered and explain how they determined which policy to enact
  - Detail the steps taken by staff with the recipient local government to achieve buy-in from elected officials or community members
4. Given that providers regard peer-to-peer engagements to be a preferred means for local governments to receive training, providers could ***promote additional opportunities for local government staffs to learn directly from one another.***

- Providers can serve an important role in organizing and facilitating these opportunities, such as grouping those tackling similar housing challenges or pairing localities in the early stages of strategic planning and implementation with localities that are further along. Some providers already lead peer-to-peer engagements but if more providers led such efforts, or coordinated with other providers on such efforts, the opportunity for more learning to be shared across local governments would increase.
- Providers could develop strategies to share what is learned in peer-to-peer engagements with local governments that were not involved, such as a webinar in which staff from participating local governments describe how the engagement benefited their work.
- Providers should also consider creating opportunities for colleagues across multiple departments in a local government – such as departments of housing, planning, and building inspections – to participate in peer-learning activities with other local governments. Ensuring that colleagues from multiple departments, rather than a single department, are included in peer-learning activities with other localities, may help reduce silos within a local government that stymie progress toward its housing goals while also promoting cross-locality learning.

#### *Increase coordination among providers*

1. *Develop a regularly-updated guide on standard data sources and tools* that can help local governments analyze specific housing topics, such as how much affordable housing could be developed or preserved via certain revenue source.
  - This could also include guidance on when and how local governments may want to use in-house data or other customized data solutions to examine topics for which standard data sources are out of date or lack localized data, such as neighborhoods at risk displacement of low-income households.
2. When one provider begins a new engagement, other providers could connect that provider with local community groups, advocates, and nonprofits in that area they have experience working with to *facilitate sustained community engagement* and ensure continuity across separate engagements.

#### *Standardize and expand the network of providers*

1. Establish *a train-the-trainer program* that helps ensure both large and small providers share a standardized set of knowledge and skills to help local governments tackle housing-related challenges.
  - The program might be based on a curriculum developed and regularly updated by a variety of experts in key topic areas, local practitioners and policy makers, and representatives from community-based organizations.
  - Providers that participate in the program could receive a third-party certification upon completion of the curriculum and local governments certified providers could be listed in

a searchable website for local governments to find qualified providers. Some convening participants thought that a rating system—envisioned as a Yelp for housing consultants—could be useful for localities to find trusted providers and give anonymous feedback after TA engagements. A certification or rating system could serve another purpose of relieving trade associations and TA organizations from the sometimes awkward situation of being asked to recommend a consultant to provide a locality with the services they need.

- A train-the-trainer program could focus on training people of color with lived experience within underserved communities to diversify the TA provider field.
2. TA providers could ***partner with university departments or research centers*** in fields such as urban planning, real estate, or public policy, to build knowledge about the outcomes of different approaches.
    - A network of such partnerships could enable the creation of a repository of student research, uploaded to a centralized database and searchable by topic and location. This database would allow TA providers to access local research data (e.g. needs assessments, interviewees, and administrative data) to inform their consulting engagements, and study similar topics across jurisdictions.
    - Partnerships would also provide an avenue for graduate students to learn skills in TA provision and provide a path to employment as a housing TA provider.

### ***Strategically integrate and align providers' work***

1. Establish a consortium of providers who agree to ***collaborate in the development of education and training resources and coordinate the delivery of TA to local governments***. The consortium could develop a process for determining which providers are best suited to certain assignments, which could be based on factors such as a provider's expertise, staff availability, location, and past experience working with a local government seeking additional assistance. A benefit of the consortium for local governments would be its ability to provide tailored expertise in key topic areas while also providing guidance on comprehensive approaches to addressing housing-related challenges. The types of tasks and projects providers in the consortium might participate in include:

#### ***Education and training alignment:***

- Collaborating on the ***development of new educational or training materials***, such as guidance for elected officials on the economics of market-rate and affordable housing development.
- Serving as ***peer reviewers*** for individual providers that develop educational or training materials.

- Creating a ***centralized help desk*** through which local governments can easily request assistance addressing housing challenges and can be routed to the most relevant resources or providers.
- Developing a ***resource repository*** through which providers can upload, categorize, and share new content with other providers or the public, which could help providers become more aware of one another's work, avoid duplicating efforts, and enable providers to create more tailored products for their TA needs.
- Working together to develop ***trainings on data analysis*** local governments can conduct to understand housing-related challenges and their progress in addressing those challenges or ***build web-based data tools*** for local governments can access to assist with analysis.
- Establishing an ongoing process through which ***one provider trains other providers*** in the consortium on particular topics or strategies for conducting successful trainings or TA engagements.

#### **Technical assistance alignment:**

- ***Regularly share information about assignments with one another***, via an online tracker for example, about the local governments with which they are working and the focus of the work being conducted. This could enable providers to more easily coordinate activities if they are simultaneously working in a locality. The tracker could include information such as approaches taken, modalities used, and key stakeholders engaged. Or a provider that worked in a locality in the past could share information and recommend strategies to a provider working in that locality at a later date.
- ***Coordinating trainings or TA assignments*** by having one consortium member lead the effort but draw on other members when more specialized expertise is needed or a more comprehensive approach to addressing a local government's needs could be achieved.

#### **Next steps for the field**

The findings of our research point to a number of challenges in providing education, training and TA on local housing policy, from local capacity limitations to barriers in implementation. There may be opportunities available to strengthen the overall ecosystem for providing these services by increasing collaboration among providers. These opportunities range from lower-intensity efforts to share knowledge to higher-intensity efforts to work jointly on developing educational and training products or coordinating TA engagements. Most of the providers whom we interviewed expressed support for more intentional sharing and promotion of one another's work, and for exploring opportunities to collaborate in the future.

A number of convening participants mentioned that LocalHousingSolutions.org serves as a valuable resource for providers and localities to learn more about housing policy and could function as a clearinghouse for information providers want to share with the field. The website

could also provide an online forum for providers to interact, coordinate and collaborate on the creation of educational and training resources or even shared TA engagements.

There was enthusiastic support among convening participants for the continuation of the process started at the convening of providers sharing and learning from each other. Regular convenings of this provider group could represent a promising next step for facilitating greater coordination and efficiency in this field.

## Appendix A: Methodology

This report is based on research conducted by Abt Associates in February, March, and October 2020, which included:

- An environmental scan to assess the types of education, training, and TA on local housing policy currently provided to local governments.
- Discussions with a select number of individuals and organization that provide education, training, and TA on local housing policy to local governments. The study team had also planned to include interviews with representatives of local governments, but the emergence of the COVID-19 pandemic made those interviews impractical.
- A virtual convening on October 15, 2020 with 28 providers, funders, and policy experts to discuss how to strengthen the ecosystem of TA, training and education on local housing policy so that local governments and other local stakeholders have the information and tools needed to develop more effective housing strategies.

### **Environmental scan**

The research team conducted an online environmental scan of approximately 50 organizations to identify resources that are currently available to assist local governments in addressing housing-related challenges. The research team used purposive sampling to include organizations in the scan that:

- Regard housing as central to their mission;
- Regularly work with or target their products to local governments; and,
- Have a broad geographic reach

We reviewed the websites of each organization, noting its housing policy priorities and, as available, its educational resources, training products and offerings, and TA services. As there is some overlap in what constitutes an educational resource versus a training, or a training versus TA, we usually deferred to the term each organization used to describe its work, while trying to maintain consistency in the level of engagement provided. For instance, the study team classified trainings as primarily one-time events, and TA as a sustained engagement with a particular community.

### **Discussions with providers**

To supplement information collected from the environmental scan, the research team had conversations with 10 providers to learn their perspective on what the field of providers does well and how its work could be more effective. Discussants were selected by the Local Housing Solutions team, which aimed to speak with representatives from a diverse set of providers within the housing policy ecosystem. Housing is a priority for each of the providers we spoke with, but there are varying philosophies that guide their work with local governments and the housing-

related policies that are emphasized. These philosophies reflect differences across organizational models, (e.g. consulting, member organization, policy advocate), audiences (e.g. organizational members/affiliates, elected officials, community organizations, general public), and missions (e.g. housing construction, housing policy change, member advocacy). Discussants included:

- **Bloomberg Associates** – Adam Freed
- **Enterprise Community Partners** – Patrick Jordan and Melinda Pollack
- **Grounded Solutions Network** – Sasha Hauswald
- **Habitat for Humanity** – Carley Ruff
- **HR&A Advisors** – Phillip Kash
- **Local Initiatives Support Corporation (LISC)** – Mark Kudlowitz and Callie Seltzer
- **National League of Cities** – Jim Brooks and Mike Wallace
- **PolicyLink** – Chris Schildt
- **Rick Jacobus** – individual consultant
- **Urban Land Institute Terwilliger Center for Housing (ULI-TCH)** – Christopher Ptomey

## October 2020 Convening

Abt Associates and the NYU Furman Center facilitated a virtual convening on October 15, 2020 to discuss how to strengthen the ecosystem of education, training, and technical assistance on local housing policy so that local governments and other local stakeholders have the information and tools needed for their communities to develop more effective local housing strategies. Convening participants included a mix of: (a) providers of education, training, and technical assistance on local housing policy and (b) funders, policy experts, and others with a strong interest in strengthening the overall ecosystem of supports for local housing policymakers and practitioners.

Much of the convening was spent in small, moderated break-out groups where participants discussed their reactions to the first draft of this white paper and brainstormed ideas to strengthen the local housing policy ecosystem. The convening concluded with participants discussing how to align priorities and next steps for the field to implement.

Convening participants included the following participants and organizations:

- Michael Anderson – **Community Change’s Housing Trust Fund Project**
- Andrew Aurand – **National Low Income Housing Coalition**
- Pamela Blumenthal – **HUD**
- Jim Brooks – **National League of Cities**
- Christopher Coes – **Smart Growth America**
- Tarsi Dunlop – **Center for Popular Democracy**
- Adam Freed – **Bloomberg Associates**
- Solomon Greene – **Urban Institute**
- Sasha Hauswald – **Grounded Solutions Network**
- Chris Herbert – **Harvard University Joint Center for Housing Studies**
- Kirsten Johnson-Obey – **NeighborWorks America**

- Patrick Jordan – **Enterprise Community Partners**
- Mark Kudlowitz – **Local Initiatives Support Corporation**
- \*Jeffrey Lubell – **Abt Associates**
- Gregory Miao – **ChangeLab Solutions**
- Janet Murguia –  **UnidosUS**
- \*Matthew Murphy – **NYU Furman Center**
- Eric Oberdorfer – **National Association of Housing and Redevelopment Officials**
- Christopher Ptomey – **Urban Land Institute Terwilliger Center for Housing**
- Carley Ruff – **Habitat for Humanity**
- Chris Schildt – **PolicyLink**
- Callie Seltzer – **Local Initiatives Support Corporation**
- Josh Shumaker – **Council of State Community Development Agencies**
- Rebecca Solomon – **NeighborWorks America**
- \*Stephen Whitlow – **Abt Associates**
- \*Mark Willis – **NYU Furman Center**
- \*Will Yetvin – **Abt Associates**
- Tina Yuen – **ChangeLab Solutions**

The accompanying annotated provider list provides a brief overview of each provider organization that participated in the discussions and convening, along with additional information collected through the environmental scan on providers' education, training, and TA products and activities.

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\* Staff from Abt Associates and the NYU Furman Center facilitated the breakout sessions. Stephen Whitlow moderated the session.