

Local Housing Playbook - Worksheet

A guided tool for municipal leaders to identify, prioritize, and advance housing production strategies

1. Your Community Snapshot

Ground your strategy in current conditions by answering the following questions.

A. Current housing production status

- Housing unit diversity (numbers of single, two-, three-, multi-family homes created)
- Annual housing production target:
- Homes permitted in past 3 years:
- Homes completed in past 3 years:
- Pipeline developments (homes and status):

B. Local needs and pressures

- Primary housing need (check all that apply):
 - Affordability
 - Workforce housing
 - Aging in community / downsizing
 - Family-sized homes
 - Transit-accessible housing
 - Rental
 - Homeownership
 - Other:

C. Barriers currently limiting production

- Regulatory barriers:
- Infrastructure constraints:
- Community opposition / communications challenges:
- Market conditions:
- Staffing / capacity limitations:
- Funding/financing constraints:
- Other:

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2. The Housing Production Continuum

Aligned with the Housing Supply Accelerator Playbook¹

The continuum below mirrors the Playbook’s core components (collaboration and partnerships, construction and development, finance, and land use and regulations) showing how communities move toward implementation. *Determine what Stage of the continuum your municipality is in.*

Continuum Stage	Playbook Alignment	Description	Your Current Position	Desired Next Position
Stage 1: Foundation & Alignment	Shared vision and data and organizational readiness	Needs assessments, plan alignment, leadership cohesion	<input type="checkbox"/>	<input type="checkbox"/>
Stage 2: Enabling Policy Framework	Modernized zoning and predictable permitting	Zoning updates, streamlined approvals, policy modernization	<input type="checkbox"/>	<input type="checkbox"/>
Stage 3: Sites, Infrastructure & Readiness	Infrastructure planning and site activation	Parcel identification, feasibility, infrastructure coordination	<input type="checkbox"/>	<input type="checkbox"/>
Stage 4: Partnerships & Financing Pathways	Funding layers and development collaboration	Public-private partnerships, financing tools, resource stacking	<input type="checkbox"/>	<input type="checkbox"/>
Stage 5: Delivery, Accountability & Outcomes	Implementation and monitoring and unit production	Approvals, construction, occupancy, progress reporting	<input type="checkbox"/>	<input type="checkbox"/>

3. Your Strategic Actions

Examples for municipalities with limited capacity (staffing, funding, bandwidth)

If you are in Stage 1: Foundation & Alignment

Low-capacity examples:

- Apply for technical assistance from your regional planning agency, Massachusetts Housing Partnership, or Citizens’ Housing and Planning Association (CHAPA)
- Review, amend, and adopt housing goals from Master Plan
- Hold a joint City/ Municipal Council/ Select Board and Planning Board meeting to align direction
- Use templated communication messages supplied by state or regional partners
- Engage in discussions with neighboring communities and/or regional housing providers

If you are in Stage 2: Enabling Policy Framework

Low-capacity examples:

- Apply for technical assistance to draft zoning updates
- Adopt small but impactful changes (parking reductions, ADU updates, IZ updates)
- Utilize model bylaws/ordinances from peer municipalities and state agencies (www.mass.gov/orgs/executive-office-of-housing-and-livable-communities)
- Form a temporary working group rather than a new standing committee

¹ https://planning-org-uploaded-media.s3.amazonaws.com/publication/download_pdf/HOUSING-SUPPLY-ACCELERATOR-PLAYBOOK_v3.pdf

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If you are in Stage 3: Sites, Infrastructure & Readiness

Low-capacity examples:

- Identify one priority parcel rather than many
- Apply for technical assistance to perform basic feasibility screening for priority site
- Coordinate infrastructure with an already planned capital project
- Use state-funded site readiness assessments (MassDevelopment)

If you are in Stage 4: Partnerships & Financing Pathways

Low-capacity examples:

- Invite mission-aligned developers to discuss feasibility before issuing RFPs
- Partner with housing authorities or nonprofit affordable housing developers
- Connect with state and quasi agencies on financing opportunities
- Explore Trust and/or CPA

If you are in Stage 5: Delivery, Accountability & Outcomes

Low-capacity examples:

- Track progress annually rather than quarterly
- Celebrate milestones publicly to build support and reduce resistance
- Request regional or state assistance for compliance documentation
- Explore regional collaboration

3. Your Strategic Actions

Identify priority steps that move you along the continuum

Short-Term Actions (0–12 months)

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-
-

Mid-Term Actions (1–3 years)

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Long-Term Actions (3+ years)

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4. Resources to Mobilize

What staffing, data, partners, funding, and state support are needed to mobilize your strategy?

Internal resources you can leverage

- Planning staff / boards:
- Elected leadership alignment:
- Communications capacity:
- Available surplus/municipal parcels:
- Aligned municipal boards and commissions (conservation, historic, disability, etc.):

External partners to activate

- Local housing nonprofits:
- Regional planning agencies:
- Developers / mixed-income housing partners:
- Philanthropic or anchor institutions:

State policies, programs, and technical assistance

- Modernization supports for zoning and permitting
- Technical assistance tied to housing production goals
- Infrastructure grants that unlock developable sites
- Affordable and mixed-income housing finance tools
- Compliance pathways for state housing requirements
- Regional collaboration and peer learning models
- Capacity-building for small and mid-sized municipalities

5. Timeline and Milestones

Mapping the path from strategy/ planning to creation of homes

Milestone	Target Date	Responsible Party
Housing needs alignment completed		
Zoning or regulatory changes adopted		
Site(s) selected and evaluated		
Developer/partner secured		
Funding package assembled		
Project approval and start		
Homes completed / occupied		

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6. Measuring Progress and Success

Define what success looks like

- Types of homes permitted per year:

- Homes affordable to key demographic groups:

- Homes that meet other specific identified needs:

- Reduced approval timelines:

- Increased community support / reduced opposition:

- Alignment with other municipal goals (e.g. transportation, economic development):

- Increased funding allocation:

- Adoption of policies to encourage affordability:

7. Communications and Engagement Plan

Supporting forward movement and reducing resistance

Messaging priorities:

Key audiences:

Engagement tactics:

Storytelling opportunities:

8. Your Housing Leadership Commitment

The City/ Town of _____ commits to advancing these housing goals in service to our community:

Signature(s): _____ Date: _____