From Data to Decisions: A Practical Guide to Community–Driven Housing Needs Assessments

Housing Needs Assessment Starter Checklist

Purpose

Stable, accessible housing supports healthy families, strong local economies, and thriving communities. This checklist is designed to help communities initiate a housing needs assessment in a clear, focused, and manageable way. It supports early decision-making around purpose, scope, capacity, and approach so that the assessment is aligned with local goals and realistic given available resources.

This tool is intended to prevent common challenges such as overly broad scope, misaligned expectations, or data collection that does not support local decision-making.

When to Use This Checklist

- Before selecting data sources
- Before designing surveys or engagement activities
- Before hiring consultants or requesting technical assistance
- Before committing staff time or financial resources

The checklist may also be revisited if the scope or purpose of the assessment changes.

How to Use This Checklist

This checklist is organized by key decision areas. Communities do not need to answer every question in detail, but should aim to build shared understanding among staff, leadership, and partners.

Items marked as **Optional** may be useful depending on local goals, capacity, and context.

1. Purpose and Desired Outcomes

- ☐ We have clearly articulated why we are conducting a housing needs assessment.
- ☐ We have identified the primary decisions, actions, or conversations this assessment is intended to support (e.g., planning, funding, policy, advocacy).
- ☐ We can answer the question: If this assessment is successful, how will our community be different?
- ☐ We have identified what this assessment is not intended to do (e.g., produce a shovel-ready project, complete a legal review, solve all housing challenges).
- ☐ Key audiences for the assessment have been identified (elected officials, community members, funders, partners, etc.).

2. Scope and Scale

- ☐ We have defined the geographic study area (city, county, region, Tribal service area, etc.).
- ☐ The selected scale aligns with how housing and labor markets function locally.
- ☐ We have considered tradeoffs between data availability, reliability, and local relevance.
- ☐ We have decided whether the assessment will focus on:
  - ☐ All housing types
  - ☐ Specific populations, housing types, or priorities (e.g., workforce housing, rental housing, rehabilitation).
- ☐ The scope reflects available capacity and resources rather than aspirational goals.

3. Roles, Capacity, and Resources

- ☐ A lead coordinator or project manager has been identified.
- ☐ We have assessed staff and volunteer capacity realistically.
- ☐ We have identified internal skills related to data analysis, engagement, facilitation, and communication.
- ☐ We have identified gaps that may require external support or technical assistance.
- ☐ Funding or in-kind resources available for this work have been identified.
- ☐ We have considered competing priorities that may affect timelines or participation.

4. Stakeholders and Engagement

- ☐ We have identified whose perspectives are essential to understanding local housing conditions.
- ☐ We have considered whose lived experiences may not be captured in available data.
- ☐ We have identified stakeholders with decision-making authority or influence over implementation.
- ☐ We have discussed how engagement input will be used (informing questions, interpreting data, prioritizing actions).
- ☐ We have considered engagement barriers (time, transportation, language, trust, access to technology).

5. Data and Information Needs

- ☐ We have identified the key questions the assessment needs to answer.
- ☐ We have discussed what types of data are needed to answer those questions.
- ☐ We understand that data are used to support decision-making, not to replace lived experience.
- ☐ We have acknowledged known data limitations, particularly for small, rural, or Native communities.
- ☐ We have discussed how qualitative input will complement quantitative data.

6. Timeline and Work Plan

- ☐ We have outlined major phases of the assessment (planning, data, engagement, synthesis, communication).
- ☐ The timeline reflects actual capacity rather than idealized schedules.
- ☐ We have built in time for review, reflection, and adjustment.
- ☐ We understand that the timeline may evolve as the assessment progresses.

7. Use of Results and Next Steps

- ☐ We have discussed how findings will be used once the assessment is complete.
- ☐ We have identified potential next steps (action planning, funding applications, policy discussions, further analysis).
- ☐ We have considered how findings will be shared back with participants and the broader community.
- ☐ We understand that the assessment is a foundation for ongoing work, not an endpoint.

8. Optional Considerations

These items may be particularly relevant depending on context:

- ☐ Alignment with comprehensive plans, housing elements, or strategic plans
- ☐ Considerations specific to rural contexts (data limitations, infrastructure, capacity)
- ☐ Considerations specific to Native Nations (governance, land tenure, data sovereignty)
- ☐ Interest in using the assessment to support advocacy or funding requests
- ☐ Plans to update or revisit the assessment over time

9. Final Check

- ☐ The scope, purpose, and approach feel manageable and aligned with local capacity.
- ☐ Expectations among staff, leadership, and partners are reasonably aligned.
- ☐ We are ready to move forward into data collection and engagement with clarity and shared understanding.

This checklist is intended to be used flexibly. Communities are encouraged to adapt it to reflect local context, capacity, and goals. Developed by MHP as part of the Housing Needs Assessment Guide.