

# Operationalizing the Federal HNA: Operationalization Checklist



AMO Webinar Series: HNA Support for Small Municipalities

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# AMO – Operationalization Checklist

This Operationalization Checklist is designed to support municipalities in translating Housing Needs Assessment (HNA) findings into concrete actions. It provides a structured framework to help municipalities move from analysis to implementation, and is meant to be a facilitative tool to support departmental coordination and inform decision making.

**How to use this document:** Work through each phase sequentially. Items are marked with a checkbox for tracking.

The ‘Notes’ column outlines the details of each of the steps included in the checklist, including who should be involved, key milestones to identify, and decisions that should be made as the Housing Needs Assessment is operationalized.

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## Section 1 – Internal Readiness

This phase ensures your municipality has the right people, relationships, and process awareness in place before acting on HNA findings. Operationalizing an HNA is not solely a planning function, it touches finance, public works, and senior leadership. Confirming internal structures early prevents findings from sitting on a shelf and promotes coordination among necessary parties.

**Before you begin operationalizing your HNA findings, confirm the following:**

#	Detail	Status	Notes
1.1	HNA has been received/endorsed by Council	<input type="checkbox"/> Complete	Ensure a formal Council resolution or report acknowledges the HNA findings. This provides the mandate to act on them.
1.2	Key staff identified	<input type="checkbox"/> Complete	Confirm who is responsible for leading HNA operationalization (e.g., Planner, CAO, Clerk). In smaller municipalities, this may be one person.
1.3	Interdepartmental contacts identified	<input type="checkbox"/> Complete	Note which departments need to be engaged (Planning, Public Works/Engineering, Finance, Economic Development, Social Services if applicable).
1.4	County/Region/DSSAB relationship confirmed	<input type="checkbox"/> Complete	Identify your County/Region/DSSAB planning contact. Clarify whether upper-tier plans already reference HNA findings and whether shared action is possible.
1.5	Planning document update schedule reviewed	<input type="checkbox"/> Complete	Identify upcoming Official Plan review, zoning by-law review, Secondary Plan updates, Community Improvement Plan (CIP) cycles, and infrastructure budget plans where HNA findings can be embedded.
1.6	Capital budget cycle noted	<input type="checkbox"/> Complete	Identify the next budget cycle where housing and infrastructure-related capital or program expenditures could be influenced by HNA findings.

## Section 2 – Understanding your Housing Gaps

Before findings can be embedded into planning documents or funding applications, they need to be translated into a clear, usable articulation of the housing gaps in your community. This phase turns raw HNA data into a shared understanding, across departments and with Council, of where the most acute needs in your community lie.

**Before embedding findings into planning documents, ensure gaps are clearly articulated:**

#	Detail	Status	Notes
2.1	Housing gaps identified by type and income groups	<input type="checkbox"/> Complete	Gaps documented across the housing continuum: emergency shelter, supportive/transitional housing, community housing, affordable rental, purpose-built market rental, ownership (affordable, entry-level, attainable, family-sized). Gaps in housing supply across income levels are documented.
2.2	Priority populations identified	<input type="checkbox"/> Complete	HNA findings address needs of seniors, persons with disabilities, Indigenous residents, youth, newcomers, and low-income households, as applicable to your community context. In cases where quantitative data is unavailable, municipalities may supplement this with qualitative data and/or local knowledge and context.
2.3	Housing gaps statements drafted	<input type="checkbox"/> Complete	A clear, plain-language summary capturing the top 3–5 housing gaps in your community. This is your key communications tool for Council, partners, and the public.
2.4	Gaps presented to Council	<input type="checkbox"/> Complete	Council has received a presentation or report summarizing HNA, including housing gap findings.

## Section 3 – Embedding HNA Findings into Planning Documents

This phase is where HNA findings move from analysis into policy. Connecting your housing gap findings to the right planning documents, and at the right moment in the update cycle for each document, is what gives the HNA lasting influence. Not every item will be

actionable immediately; the goal is to identify where the connections exist and ensure no update cycle passes without considering the HNA evidence.

#	Detail	Status	Notes
<b>Official Plan</b>			
3.1	Reviewed existing Official Plan (OP) housing policies against HNA findings	<input type="checkbox"/> Complete	Compare current OP housing policies to your documented gaps to identify policies that are outdated, insufficient, or absent altogether.
3.2	Flagged OP sections for HNA reference	<input type="checkbox"/> Complete	Identified specific sections of the OP where HNA findings should be incorporated, such as housing vision and goals, permitted housing types, affordable housing policies, and additional needs housing provisions.
3.3	Drafted or flagged language for OP update	<input type="checkbox"/> Complete	Prepared or noted specific policy language that references HNA-identified gaps and targets (e.g., "The municipality will prioritize development that addresses the identified shortage of accessible and affordable rental units as documented in the Housing Needs Assessment").
3.4	Confirmed OP update timeline	<input type="checkbox"/> Complete	Determined whether HNA findings can be incorporated in the current OP review cycle.
<b>Zoning By-Law</b>			
3.5	Reviewed zoning permissions against HNA findings	<input type="checkbox"/> Complete	Assessed whether current zoning permits the housing types identified as gaps in the HNA, such as middle-density housing stock or additional dwelling units.
3.6	Identified zones for targeted updates	<input type="checkbox"/> Complete	Noted specific zones or areas where zoning changes could directly respond to HNA-identified gaps, such as areas suitable for gentle density.
3.7	Reviewed provincial policy intersections	<input type="checkbox"/> Complete	Considered how recent provincial changes (e.g., as-of-right permissions, strong mayor provisions) interact with HNA findings and may require or enable zoning updates.
<b>Community Improvement Plan</b>			
3.8	Reviewed existing CIP or incentives against HNA findings	<input type="checkbox"/> Complete	Assessed whether current incentive programs align with the housing types

#	Detail	Status	Notes
			and populations identified as priorities in the HNA.
3.9	Considered new or amended CIP programs	<input type="checkbox"/> Complete	Evaluated whether a new CIP or CIP amendment could incentivize housing types that address documented gaps, such as secondary suites, accessible units, or affordable rental conversions.
3.10	Confirmed administrative capacity	<input type="checkbox"/> Complete	Determined whether your municipality desires to administer a housing-focused CIP program, and whether a County or Regional partnership would be beneficial.
<b>Other Planning Documents</b>			
3.11	Reviewed related master plans and studies	<input type="checkbox"/> Complete	Checked Parks and Recreation Master Plan, Asset Management Plan, and servicing studies for alignment with HNA population and household projections.
3.12	Flagged demographic findings for infrastructure planning	<input type="checkbox"/> Complete	Noted where HNA findings (e.g., aging population, smaller household sizes) should inform infrastructure capacity, service levels, and long-range capital planning.

### Section 4 – Making a Business Case and Assisting Funding Applications

An HNA is one of the most valuable assets a municipality can bring to a housing funding application, whether that application is pursued by the municipality or a local non-profit housing organization. This phase focuses on translating your housing gap findings into compelling, evidence-based business cases that can be adapted for provincial and federal programs. Having this groundwork done in advance puts your municipality in a strong position to respond quickly when funding opportunities arise.

**Using your HNA to access funding:**

#	Detail	Status	Notes
4.1	HNA used as evidence base for provincial/federal funding applications	<input type="checkbox"/> Complete	Identify grant programs where housing gap data strengthens your application (e.g., CMHC programs, provincial housing supply programs).
4.2	Business case summary prepared	<input type="checkbox"/> Complete	A summary of your municipality's priority housing gaps, key data points, and proposed interventions. Can be adapted for multiple funding applications and

#	Detail	Status	Notes
			used to guide project selection upon the receipt of funding (e.g., the Community Stream of the Build Communities Strong Fund).
4.3	County/Region/DSSAB informed of your gaps	<input type="checkbox"/> Complete	Upper-tier municipalities and Service Managers often have access to funding streams (e.g., Canada-Ontario Housing Benefit, Affordable Housing Fund) that require lower-tier input. Ensure your County/Region/DSSAB is aware of your HNA findings.
4.4	Development community engaged	<input type="checkbox"/> Complete	Where HNA findings identify viable private-sector responses (e.g., rental apartment development, accessible ownership units), consider how your municipality can communicate needs and remove barriers for developers.
4.5	Non-profit community engaged	<input type="checkbox"/> Complete	Shared HNA findings with local and regional non-profit housing providers, co-operative housing organizations, and community land trusts operating in or near your municipality. Non-profits are often best positioned to deliver housing for the populations and unit types most commonly identified as gaps in small community HNAs, and many funding programs require or favour a municipal and non-profit partnership.

### Section 5 – Monitoring and Updating

Completing and operationalizing an HNA is not a one-time event. This phase establishes the light-touch tracking and reporting practices that keep HNA findings alive in your municipality's planning work and ensures your municipality is well-prepared when the five-year update is due.

**After you complete your HNA, consider the following:**

#	Detail	Status	Notes
5.1	Performance indicators identified	<input type="checkbox"/> Complete	Select 3–5 indicators to track progress on HNA-identified gaps over time (e.g., number of new affordable rental units

#	Detail	Status	Notes
			approved, reduction in waitlist length, increase in accessible unit supply).
5.2	Data sources for monitoring confirmed	<input type="checkbox"/> Complete	Identify who will collect and track each indicator (building permits, CMHC, County waitlist data).
5.3	Council reporting schedule established	<input type="checkbox"/> Complete	Determine how frequently HNA progress towards recommendations will be reported to Council.
5.4	Five-year update reminder set	<input type="checkbox"/> Complete	Flag the HNA review date in your planning work program. Begin planning the update process 12–18 months before the five-year mark. Consider updating more frequently if critical data and local information becomes available (e.g., new census release).

## Reference Examples

### Key Planning Connections

The following table illustrates examples of key planning connections that can be drawn from the Housing Needs Assessment findings within a municipality. Examples of actions to address these findings are included with each planning connection.

HNA Finding Example	Planning Document	Action
Shortage of affordable rental units	Official Plan (OP), Community Improvement Plan (CIP)	Add affordable rental policies; create incentive program
Lack of accessible/senior-friendly housing	OP, Zoning By-law (ZBL)	Permit accessible unit types as-of-right; OP policies supporting aging-in-place
Need for gentle density (additional residential units, infill developments)	ZBL	Increase as-of-right permissions in all residential zones
Insufficient serviced land supply	OP, Infrastructure Master Plan	Land supply review; servicing feasibility study
Need for increased water system capacity to support housing supply	OP, Infrastructure Master Plans, Asset Management Plans	Infrastructure capacity assessments; assessment of levels of service targets; capital and operating costing scenarios

HNA Finding Example	Planning Document	Action
Workforce housing gap	CIP, Economic Development Strategy	Employer partnership programs; attainable ownership incentives
Gaps for vulnerable populations	OP, Service Manager coordination	Social housing policies; Service Manager partnership

### Key Performance Indicators

A key component of operationalizing Housing Needs Assessments (HNAs) is ensuring that targets and goals are clearly identified and measurable. Key performance indicators (KPIs) enable the ongoing monitoring and evaluation of the actions municipalities undertake to address local housing needs. Establishing KPIs also helps municipalities communicate progress to Council, community partners, and the public, while strengthening future funding applications and planning updates.

Municipalities should select indicators that are realistic to monitor within their local context and that align with the housing gaps identified through the HNA. In smaller municipalities, a focused set of indicators may be more practical and sustainable than a comprehensive monitoring program. Indicators may be quantitative (e.g., number of units created) or qualitative (e.g., progress on partnerships or policy implementation).

Key performance indicators may be tracked on an annual basis, as data becomes available, or incorporated into the existing review cycle for key policy and planning documents.

Examples of key performance indicators municipalities may consider tracking include:

Category	Sample Indicators
Housing Supply	<ul style="list-style-type: none"> <li>• Number of new housing units approved and/or constructed</li> <li>• Number of affordable rental units approved and/or constructed</li> <li>• Number of purpose-built rental units approved and/or created</li> <li>• Number of accessible or barrier-free units created</li> <li>• Number of supportive or transitional housing units created</li> </ul>
Housing Affordability	<ul style="list-style-type: none"> <li>• Average market rent and home sales price by unit type</li> <li>• Percentage of households spending more than 30% of gross household income on shelter costs</li> <li>• Change in affordability for renter and owner households over time</li> </ul>
Housing Need	<ul style="list-style-type: none"> <li>• Vacancy rates in the primary rental universe</li> </ul>

Category	Sample Indicators
	<ul style="list-style-type: none"> <li>• Length of community housing waitlist</li> <li>• Number of households experiencing homelessness or housing insecurity</li> <li>• Number of households in core housing need</li> </ul>
Planning and Policy Implementation	<ul style="list-style-type: none"> <li>• Introduction and/or completion of any zoning by-law amendments in response to HNA findings</li> <li>• Number of housing-related Community Improvement Plan (CIP) applications approved</li> </ul>
Infrastructure and Servicing	<ul style="list-style-type: none"> <li>• Investments in infrastructure supporting housing growth</li> <li>• Percentage of planned housing growth located within serviced settlement areas</li> </ul>
Partnerships and Funding	<ul style="list-style-type: none"> <li>• Number of funding applications supported using HNA findings</li> <li>• Value of housing-related funding secured</li> <li>• Number of partnerships established with non-profit housing providers, Service Managers, or private sector developers</li> </ul>
Priority Populations	<ul style="list-style-type: none"> <li>• Number of housing units created targeting priority populations</li> </ul>