



## 2025 State of Zoning Reform: Trends, Tools, and Impact From the Past 5 Years

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## Executive Summary

Zoning and land-use policy in the United States is undergoing its most consequential transformation in decades. Since 2020, states and local governments across the country have moved beyond isolated pilot reforms toward systematic modernization of zoning codes, approval processes, and development standards. These changes are driven by persistent housing shortages, rising costs, workforce constraints, and growing recognition that legacy zoning frameworks often inhibit attainable housing production rather than guide it effectively.

This report documents and analyzes zoning reforms adopted since 2020 across all regions of the United States, with a focus on binding regulatory changes at the state and local levels. Drawing on a comprehensive dataset of enacted statutes, ordinances, and zoning code amendments, the analysis reveals a clear national shift: zoning reform has moved from the policy margins to the center of housing strategy.

The analysis in *Zoning Reform: Trends, Tools, and Impacts* is based on the full, interactive dataset available at [nahb.org/lu101](https://nahb.org/lu101).

### *Zoning Reform Has Become a Mainstream Housing-Supply Tool*

Once concentrated in a small number of early adopter cities and coastal states, zoning reform is now geographically widespread and politically diverse. States and localities across the Northeast, Midwest, South, and West are adopting similar policy tools — accessory dwelling unit (ADU) legalization, missing-middle housing allowances, parking reform, transit-oriented development (TOD) mandates, and streamlined approvals — albeit tailored to local market conditions and political contexts.

A defining feature of this reform cycle is the growing role of state governments. Legislatures are increasingly setting minimum zoning and permitting standards, narrowing the range of local discretion that historically characterized U.S. land-use regulation. Statewide mandates for ADUs, small-scale multifamily housing, parking reductions, and by-right approvals are now common, while nonbinding statewide housing plans often lay the groundwork for later mandatory reforms. At the same time, local governments remain central to implementation — and in many cases are moving beyond state floors with more ambitious local zoning updates.

### *The Focus Has Shifted from Allowance to Feasibility*

The current wave of reform is notable not only for expanding what housing types are allowed, but for prioritizing whether those allowances are realistically buildable. Jurisdictions are increasingly recognizing that zoning capacity alone does not translate into housing production without administrative certainty.

As a result, procedural reform has emerged as a central pillar of zoning modernization. Across the country, local and state governments are adopting by-right approvals, enforceable review

timelines, and objective design standards to reduce entitlement risk, shorten timelines, and lower soft costs. Parking reform — often the elimination or sharp reduction of minimum parking requirements — has proven to be one of the most impactful and widely adopted tools for improving project feasibility, particularly for infill and small-scale development.

This shift reflects a broader evolution in policy thinking: The frontier is no longer simply “allowing more housing,” but ensuring that regulatory systems reliably produce housing at scale.

### *Local Reform Is Incremental, Iterative, and Increasingly Sophisticated*

While statewide action often draws the most attention, the most immediate impacts on development feasibility are occurring through local zoning reforms. Cities are revising dimensional standards, expanding allowable housing types, reducing parking requirements, and converting discretionary approvals to objective, by-right processes. These reforms tend to be cumulative rather than singular—layered over multiple years through successive ordinances and code updates.

Three categories dominate local reform activity:

- ADUs and small-scale multifamily housing, often paired with relaxed dimensional standards and by-right approvals.
- Parking reform, particularly in downtowns, corridors, transit areas, and mixed-use districts.
- Streamlined approvals, including objective standards and expedited review pathways.

Many jurisdictions are also adopting form-based or pattern zoning as a politically durable way to enable “gentle density,” trading use-based restrictions for envelope- and design-focused regulation that expands housing options while emphasizing predictability and neighborhood compatibility.

### *Zoning Reform Is Necessary — but Not Sufficient*

The findings underscore that zoning modernization is a critical foundation for addressing housing shortages, but it cannot operate in isolation. Building codes, infrastructure requirements, impact fees, subdivision regulations, and administrative practices all shape whether newly permitted housing can actually be delivered.

Jurisdictions that align zoning reform with complementary changes — such as coordinated permitting, infrastructure investment in infill areas, and building codes that support diverse housing types — are more likely to see meaningful gains in housing production. Where misalignment persists, expanded zoning capacity may fail to translate into real-world outcomes.

### *Implications Going Forward*

The central question facing policymakers, practitioners, and builders is no longer whether zoning reform will continue, but how effectively it will be implemented. As reforms mature, success will depend on coordination: aligning zoning allowances, approval processes, design standards, and infrastructure systems to create predictable, market-feasible pathways for housing development.

The reforms documented in this report signal a durable national shift. Zoning reform has become a core component of housing policy across regions and political contexts — reshaping development opportunities, redefining local land-use practice, and setting new expectations for how housing supply challenges are addressed in the United States.

## Introduction

Zoning and land-use policy in the United States has entered a period of rapid and consequential change. Faced with persistent housing shortages, rising costs, labor constraints, and mounting political pressure to increase housing supply, many states and local governments have begun to reconsider long-standing regulatory frameworks that shape where, how, and how much housing can be built. What was once a fragmented landscape of isolated pilot programs and incremental local amendments has evolved throughout the country into a widespread, outcome-driven movement toward zoning modernization.

The analysis in *Zoning Reform: Trends, Tools, and Impacts* is based on the full, interactive dataset available at [nahb.org/lu101](https://nahb.org/lu101).

### *Scope of This Report*

This report examines the scope, character, and implications of state and local zoning reforms adopted since 2020. Drawing on a comprehensive review of enacted legislation, ordinances, and zoning code amendments, it documents how jurisdictions across regions are expanding allowable housing types, reducing regulatory barriers, and streamlining approval processes in response to housing market pressures. While early reforms were concentrated in a small number of high-cost coastal metros, the research shows that zoning reform is now geographically widespread and politically diverse, extending into the Mountain West, Midwest, South, and smaller metropolitan and university communities.



*Increasingly, state legislatures are taking a role alongside local governments to adopt standards for housing production. Source: Elan Irving*

*The Growing Role of Statewide Action*

A defining feature of the current reform cycle is the expanding role of state governments. State legislatures are increasingly setting minimum standards for housing production. State mandates for accessory dwelling units, neighborhood-scale multifamily housing (aka “missing-middle housing”), transit-oriented development, parking reform, and streamlined approvals have narrowed the range of local discretion that historically defined U.S. zoning practice. At the same time, local governments remain central actors, translating state requirements into on-the-ground zoning amendments and, in many cases, moving beyond state floors with more ambitious local reforms.

*From Allowance to Feasibility*

This wave of zoning reform is notable not only for changes in permitted density or use, but also for its emphasis on predictability. Jurisdictions are increasingly replacing discretionary review with by-right approvals, adopting objective design standards, eliminating parking minimums, and establishing enforceable timelines for permit review. These procedural reforms reflect a growing recognition that even where zoning technically allows additional units, regulatory uncertainty can undermine housing production.

The purpose of this report is threefold:

1. To offer a structured overview of national and regional zoning reform trends, highlighting common policy tools across jurisdictions.
2. To document how both binding and nonbinding reforms are being implemented at both the state and local levels.
3. To assess the practical implications of these changes for housing production, development feasibility, and market opportunities—recognizing that zoning reform is a necessary, but not sufficient, condition for increasing supply.

### *Methodology and Source Documentation*

This analysis draws on a systematic review of primary legal documents, including enacted statutes, ordinances, bill texts, and local zoning code amendments, supplemented by secondary sources such as legislative analyses, municipal staff reports, planning studies, and reputable news coverage. The scope is limited to policies adopted from 2020 to the present, with a focus on statewide reforms and local jurisdictions with populations of 50,000 or greater.

The primary emphasis is on binding regulatory changes such as zoning code updates, housing mandates, and land-use reforms. However, the review also includes statewide nonbinding plans and guidance documents when they meaningfully influence local housing policy or implementation. Each reform was evaluated based on reform type, geographic scope, enactment status, and implementation details to ensure consistent categorization across states and localities.

Information was cross-verified when possible, with direct links to legislative text and official government sources to maintain accuracy, as well as citations of secondary sources to assist with context. Notes fields add implementation nuances and any legal or administrative updates.

### *Why These Trends Matter*

The findings presented here illustrate how zoning modernization has moved from the policy margins to the center of housing strategy in the United States. The central question facing policymakers, practitioners, and builders is no longer whether zoning reform will occur, but how it will be implemented—and whether it will translate into predictable outcomes that meaningfully expand housing supply.



*The city of Minneapolis, an early adopter of local experimentation in zoning reform in 2019, helped to spark the recent wave of zoning overhauls around the country. Source: Aerial\_Views*

## Zoning Reform Trend Analysis

Across the country, zoning reform has accelerated at a pace not seen in decades. What began as a handful of early adopters—most notably Minneapolis; Portland, Ore.; and the State of Oregon—has broadened into a national wave marked by increasingly assertive state interventions and expanding local experimentation.

A marked shift is visible between 2020 and 2025: rather than adjusting single provisions of their codes, localities are now typically rewriting entire zoning frameworks, especially to open up feasibility for small- and mid-scale development. Across regions, the research signals three high-level findings:

1. **Zoning reform is now a mainstream housing-supply strategy.** States and cities across the political spectrum increasingly view zoning modernization as essential to addressing affordability, labor shortages, and infrastructure efficiency.
2. **Procedural reform matters as much as density reform.** By-right approvals, timeline guarantees, and objective standards are becoming indispensable tools for jurisdictions seeking predictable, scalable outcomes.
3. **The policy frontier has shifted from “allowing more housing” to “ensuring it is feasible to build.”** This includes eliminating parking minimums, widening the range of permitted building types, expanding transit-oriented development (TOD) areas, and aligning state incentives with local land-use obligations.

### *From Zoning Capacity to Development Certainty*

As these reforms mature, a clear pattern emerges: increasingly, jurisdictions are no longer just focused on what can be built, but also on how reliably it can be approved. The research shows a growing recognition that zoning capacity without administrative certainty does not translate into housing production. As a result, streamlining—through by-right approvals, predictable timelines, and objective standards—has moved from a complementary reform to a central pillar of modern zoning practice.

Expedited permitting is one of the most important reform measures, as even generous density allowances fail without predictable permitting pathways. Across the dataset, many major jurisdictions now include elements such as:

- By-right approvals for multifamily development in targeted zones (Los Angeles Executive Directive 1 projects; Minneapolis missing-middle and multifamily by-right districts; Charlotte Unified Development Ordinance conventional zoning districts).
- Strict deadlines for permit review, with approvals defaulting to “automatic” in some states if local governments miss timelines (Florida’s Live Local Act; Texas “shot-clock” legislation; Colorado land-use reform proposals).
- Objective design standards replacing discretionary review boards (Portland, Ore., Residential Infill Project standards; Washington State’s streamlined design review).



*New infill standards in Portland, Ore., guide more housing options and thoughtful building scale.  
Source: dpproductions*

Other significant trends across regions include:

- Citywide reduction or removal of mandatory parking minimums (Boise, Idaho; Raleigh, N.C.; Anchorage, Alaska; Richmond, Va.).
- Full pattern-/form-based code conversions (Burlington’s 2024 Neighborhood Code; Norfolk’s pattern zoning; Fort Worth’s form-based expansions).
- Normalizing small-scale, multifamily housing options in districts formerly restricted to single-family homes, especially with reduced dimensional standards and by-right approvals (Minneapolis 2040 Plan implementation; Portland’s Residential Infill Project; Charlotte’s UDO middle-housing framework).
- Density-for-affordability reforms, especially in growth markets (Denver Expanding Housing Affordability initiative; San Diego Complete Communities Housing Solutions).

## REGIONAL TRENDS IN ZONING REFORM

While zoning reform is now a national phenomenon, priorities and policy tools can vary notably across regions. Differences in political culture, market pressures, state/local dynamics, and growth patterns shape how reforms emerge and what problems they are designed to solve. Although this regional analysis assigns all 50 states to one of four U.S. regions, states and cities are highlighted that most clearly illustrate dominant trends.

**NOTE:** This table uses four broad regions based on NAHB’s regional framework. However, zoning and housing policy can vary meaningfully within those regions. Elsewhere in the report, the analysis uses more specific subregional descriptors — such as Mountain West or Pacific Northwest — to reflect differences in growth dynamics, political context, and state-local governance structures. These references are intended to improve analytical clarity rather than redefine the regional framework.

### NORTHEAST

Maine, New Hampshire, Vermont, Massachusetts, Rhode Island, Connecticut, New York, New Jersey, Pennsylvania

The Northeast has shifted from pilot overlays to comprehensive zoning and code modernization, driven largely by state mandates and strong planning institutions. A defining regional feature is the growing use of form-based or pattern zoning paired with climate, transit, and walkability goals.

#### Highlights

- Maine and Vermont now have some of the strongest statewide missing-middle housing mandates, with local implementation underway.
- Burlington’s 2024 Neighborhood Code is a leading example of citywide pattern-based zoning and elimination of density caps.
- Massachusetts continues to expand the MBTA Communities Act, tightly integrating zoning reform with transit planning.
- Rhode Island recently adopted a broad ADU allowance law following years of incremental reform.
- Larger states (New York, New Jersey, Pennsylvania) show uneven but accelerating reform concentrated in major metro areas.

### MIDWEST

Ohio, Indiana, Illinois, Michigan, Wisconsin, Iowa, Minnesota, Missouri, North & South Dakota, Nebraska, Kansas

The Midwest is transitioning from isolated early adopters to more scalable, citywide restructuring. The dominant pattern is incremental legalization of middle housing, frequently paired with deep procedural streamlining.

#### Highlights

- Minneapolis and St. Paul remain influential for citywide legalization of a broader range of housing types and reduced parking requirements.

## REGIONAL TRENDS IN ZONING REFORM

- Madison, Milwaukee, Chicago, and Columbus have enacted major density reforms, transit-corridor rezonings, ADU expansions, or parking minimum eliminations.
- Statewide action is emerging more slowly (Minnesota negotiations in 2024; early frameworks in Michigan and Illinois; Wisconsin's 2023 reforms).
- Other Midwestern states show localized reform activity, often tied to college towns or regional employment centers.

### SOUTH

Delaware, Maryland, District of Columbia, Virginia, West Virginia, North & South Carolina, Georgia, Florida, Kentucky, Tennessee, Alabama, Mississippi, Arkansas, Louisiana, Oklahoma, Texas

Southern jurisdictions often frame zoning reform as economic development and workforce housing policy, advancing change through preemption, incentives, and administrative streamlining rather than wholesale rezoning.

#### Highlights

- Texas legislation (SB 840, SB 15) reflects a push toward statewide consistency in approvals, infrastructure financing, and permitting timelines, while limiting local barriers.
- Florida's Live Local Act is one of the nation's strongest incentive/preemption hybrids, overriding local zoning to allow mixed-income and affordable housing near commercial corridors.
- Tennessee has strengthened statewide middle-income housing reporting and planning requirements.
- Virginia localities (Norfolk, Richmond, Alexandria) are emerging leaders in pattern zoning, ADUs, and corridor-based mixed-use reforms.
- Other Southern states show selective reform activity tied to fast-growing metros and competitiveness strategies.

### WEST

Montana, Idaho, Wyoming, Colorado, New Mexico, Arizona, Utah, Nevada, Washington, Oregon, California, Alaska, Hawaii

The West combines strong state preemption on the Pacific Coast with pragmatic, growth-driven reform in interior states. The common thread is zoning reform as a response to rapid growth, housing shortages, and infrastructure constraints.

#### Highlights

- California continues to implement the country's most sweeping legislative package (SB 9, SB 10, AB 2097, ADU reforms), explicitly linking housing to climate and transit goals.
- Oregon's HB 2001 remains the flagship missing-middle mandate nationally, paired with strong statewide ADU preemption.

## **REGIONAL TRENDS IN ZONING REFORM**

- Washington's middle-housing and ADU reforms demonstrate bipartisan appetite for statewide preemption.
- Utah's TOD and moderate-income housing reforms tightly link state incentives with zoning outputs.
- Colorado cities (Denver, Boulder, Fort Collins) lead nationally on corridor TOD, parking elimination, and missing-middle legalization.

### *What These Trends Reveal*

Taken together, the national and regional patterns point to a profound shift in how jurisdictions approach land use and housing. The reforms cataloged across the country show that zoning modernization is no longer a niche strategy or limited to a handful of pioneering cities. Instead, it has become a central pillar of housing policy, with states and local governments adopting increasingly sophisticated tools to expand supply, reduce barriers, and make development more predictable.

## **Acceleration of Statewide Zoning Initiatives**

Over the past five years, statewide housing and land-use reform has accelerated across the country, driven by an urgent need to expand housing supply, reduce regulatory delays, and encourage a wider range of attainable housing types. While the specifics differ by state, clear national patterns have emerged. Together, these trends are reshaping the regulatory landscape in ways that increasingly influence development feasibility and market opportunities across metropolitan and rural markets alike.

State legislatures have increasingly entered a domain once left largely to local governments: zoning and land-use regulation. Mandatory statewide reforms fall into several consistent categories, each aimed at reducing barriers to residential development and expanding the types and locations of permissible housing.

### *Statewide ADU Legalization: The Most Widely Adopted Reform*

ADU legalization is now the most common mandatory statewide reform. States such as California, Oregon, Washington, Rhode Island, and others have enacted laws that:

- Allow ADUs by right on most or all residential lots;
- Preempt restrictive local zoning barriers such as minimum lot size, owner-occupancy rules, and excessive fees; and
- Establish timelines for permit approval and limit discretionary review.

ADU laws create new small-scale production opportunities and open infill sites previously limited to a single unit. By-right processes also help to reduce regulatory uncertainty.



*Accessory dwelling unit legalization is now the most common mandatory statewide reform.  
Source: Linda Yolanda*

### *Streamlined Approvals and By-Right Housing: Targeting Regulatory Delays*

Many states now require faster, more predictable housing approvals, often through explicit by-right entitlements for qualifying housing. These laws commonly include:

- Strict timelines for permit review,
- Limits on discretionary hearings,
- Clear, objective design or form standards, and
- Requirements that local governments update zoning to comply.

Streamlined approvals can reduce time to construction and cut soft costs, but implementation may vary depending on state enforcement mechanisms and local government capacity.

### *Missing-Middle Housing Legalization and State Preemption of Single-Family-Only Zoning*

A smaller but growing number of states have mandated that localities allow duplexes, triplexes, fourplexes, or cottage clusters in areas traditionally zoned exclusively for detached single-family homes. Examples include Oregon's HB 2001, California's SB 9 (lot splits and duplexes), as well as several emerging initiatives in Mountain West and Midwest states.

### *Parking Reform Mandates*

Some reforms eliminate or restrict local parking minimums — particularly near transit or main streets. These rules directly reduce land and construction costs. Lower parking requirements can

improve the economics of infill development, though availability of on-street parking and market expectations still influence project design.



*Eliminating parking minimums can help support more housing production by reducing land and construction costs. Source: Brian Brown*

### *TOD Mandates*

States such as California, Colorado, Massachusetts, and Utah increasingly require localities to allow more density near transit stations, corridors, or high-frequency bus routes. TOD mandates often create higher-yield development opportunities in constrained markets and can broaden the allowable housing mix in well-located areas.

### *Nonbinding Statewide Housing Plans*

Several states have implemented nonbinding planning frameworks, often aligned with statewide housing needs assessments or affordability strategies. Although these plans do not preempt local zoning, they play a significant role in shaping future regulatory changes.

Common features of nonbinding statewide plans include:

- **Quantified housing needs:** Estimates of production targets, demographic trends, workforce housing gaps, and regional shortages;

- **Baseline assessments of regulatory barriers:** Identification of zoning constraints such as minimum lot size, limited multifamily districts, and lengthy approvals;
- **Recommendations for local zoning modernization:** Encouraging ADUs, smaller lots, missing-middle housing, mixed-use development, or reduced parking;
- **Integration with economic development strategies:** Linking housing needs to labor force retention, employer recruitment, and regional competitiveness;
- **Funding alignment:** Offering incentives for communities that adopt zoning or permitting best practices.

These nonbinding plans are often the foundation for later mandatory reforms, as seen in states where needs assessments directly preceded significant zoning updates. Even without binding authority, statewide plans can shift political expectations and drive local planning revisions. These documents often signal:

- Upcoming zoning reforms,
- New funding or infrastructure investment zones,
- State priorities for housing types or locations, and/or
- Opportunities to partner with local governments seeking to align with state goals.

### *Emerging Themes to Watch*

- **Growing legislative interest in statewide preemption** — particularly for ADUs, affordability bonuses, and process reforms.
- **Increasing reliance on “objective design standards”** as a way to streamline approvals without eliminating local control.
- **State involvement in TOD and infill strategies**, often tied to climate, transportation, or economic development goals.
- **Linkages between statewide planning documents and grant programs**, creating incentives for local governments to modernize zoning voluntarily.
- **Transition from voluntary statewide housing plans** to mandatory compliance frameworks in states facing acute housing shortages.

## On the Ground with Local Zoning Reforms

Local zoning reform has emerged as one of the most dynamic — and consequential — drivers of housing supply across the country. Although statewide legislation often attracts the headlines, the most immediate changes affecting builders and developers are increasingly taking place in city councils, planning commissions, and county boards.

Research for this report reveals a rapidly evolving landscape in which local governments are revisiting long-standing land use rules, adjusting dimensional standards, rethinking parking requirements, and modernizing approval processes to respond to mounting housing needs. These reforms are not confined to coastal metros or high-growth regions; they are appearing in mid-sized cities, legacy communities, and university towns, reflecting a broad recognition that today's zoning frameworks often constrain attainable housing production.

Importantly, local zoning reform tends to be incremental and iterative rather than sweeping; cities rarely adopt a single transformational ordinance, but instead layer multiple changes over several years. This creates an environment where entitlements shift in steps rather than all at once, requiring ongoing attention to code updates, overlay districts, and procedural changes. Entitlement conditions in many markets are changing in steps, rather than all at once and requiring regular monitoring rather than one-time code updates.

Research indicates that local reforms are:

- **Predominantly binding changes to zoning and development codes** — not just plans or statements of intent. The bulk of entries are ordinances that directly change use permissions, densities, parking requirements, or approval processes.
- **Frequently iterative.** Many jurisdictions show multiple entries over several years — e.g., an initial ADU allowance followed by dimensional relief, fee reductions, or broader missing-middle legalization. The local story is less about “one big reform” and more about cumulative layers of zoning modernization.

Although local reforms cover the full menu of zoning topics, three categories stand out:

1. ADUs and small-scale multifamily housing
2. Parking reform
3. Expedited permitting

## *ADUs and Small-Scale Multifamily Housing*

A large share of local reforms focuses on ADUs and small multi-unit forms (duplexes, triplexes, fourplexes, cottage courts, courtyard apartments):

- Many cities that first legalized ADUs before 2020 have since loosened dimensional standards (height, setbacks, lot coverage), reduced or removed parking requirements, and shifted from discretionary reviews to by-right approvals.
- Other jurisdictions are moving beyond ADUs to allow duplexes or small multiplexes in formerly single-family zones, or to create overlays that specifically target “missing-middle” types within walkable neighborhoods.

This trend reflects a local priority for incremental, neighborhood-scale intensification rather than wholesale upzoning. It opens opportunities for small infill projects and build-for-rent formats, especially in markets where conventional greenfield subdivisions face land constraints or infrastructure limits.



*The trend to legalize more “missing-middle” homes — neighborhood-scale, multifamily housing — reflects an interest in incremental change. Source: zimmytws*

## *Parking Reform as a Workhorse of Local Change*

Local governments are also leaning heavily on parking reform as a core tool.

- Many entries document elimination or sharp reduction of off-street parking minimums in downtowns, transit corridors, mixed-use districts, and in some cases, citywide.
- Several reforms pair parking reductions with design requirements or Transportation Demand Management measures (bike parking, shared-parking arrangements, or unbundling parking costs) rather than simply removing parking rules.

These changes can meaningfully reduce hard costs and site constraints—especially for small urban infill sites—but they can also shift risk to the private market to correctly size parking and manage neighborhood expectations.

## *Streamlined and by-right approvals*

The research shows a growing emphasis on approvals and process, not just what is allowed on paper.

- Numerous jurisdictions now allow the conversion of common housing types, from ADUs and small multi-unit buildings to mixed-use residential over ground-floor retail via by-right use with objective standards.
- Others introduce expedited review tracks for projects that meet affordability criteria, are near transit, or conform to pre-approved pattern books or form-based standards.

Implementing by-right standards stand to materially shorten timelines and reduce entitlement risk. However, new design overlays and form controls risk adding complexity even as they nominally streamline approvals.

## *Other Trends in Local Zoning Reform*

Local zoning reform is increasingly characterized by targeted density rather than blanket upzoning. Municipalities often choose to focus on height, FAR, and unit increases where infrastructure and amenities already exist, especially corridors, downtowns, transit areas, and mixed-use centers. Some jurisdictions are pairing this approach with form-based or “pattern” zoning, replacing use-based single-family districts with design-focused frameworks or pre-approved housing types. The design emphasis can help to allow more units while offering political reassurance about predictability and neighborhood character.

Taken together, the local zoning reforms captured in the research point to several practical implications:

1. **More pathways, more nuance.** There are more ways to entitle housing—ADUs, cottage clusters, “gentle density” overlays, transit-area bonuses—but each comes with distinct standards and eligibility criteria. Success will depend on project-by-project code fluency.

2. **Increasing value of small-scale and infill expertise.** Many reforms are designed to unlock smaller, scattered sites in established neighborhoods and corridors. Builders who can operate efficiently in these contexts — often with lower parking ratios and tighter form controls — may find new opportunities.
3. **Time savings where by-right is genuine.** Where codes truly shift to objective, by-right approvals, builders can expect reduced entitlement risk and faster timelines. But where “streamlining” is layered with complex design requirements or overlapping overlays, the benefits may be muted.
4. **Need for active engagement in local code writing.** Because local reforms are often iterative and politically negotiated, there is an ongoing opportunity to shape dimensional and design standards and advocate for predictable, objective rules rather than discretionary reviews. It is also important to gather cost and feasibility feedback to ensure that new entitlements are actually buildable.



*Under Washington State’s HB 1293 (2023), cities must use objective, measurable design standards — replacing discretionary design review with clearer, consistent rules. Source: Phil Augustavo*

## Conclusion

Zoning reform is best understood as a necessary — but not sufficient — condition for addressing the nation’s housing shortages. Although modernized zoning can expand allowable housing types and create more predictable entitlement pathways, it operates within a broader ecosystem of land-use controls and development regulations that collectively shape housing feasibility. Building codes, subdivision regulations, design standards, impact fees, infrastructure requirements, and local administrative practices all influence whether newly permitted housing can be delivered at scale and at attainable price points.

In many jurisdictions, zoning capacity has expanded faster than the supporting regulatory and infrastructure frameworks needed to translate that capacity into production. Outdated or overly prescriptive building codes, inconsistent interpretation of state and local requirements, and fragmented permitting processes can erode the benefits of zoning reform by adding cost, delay, or uncertainty. Similarly, land-use policies governing infrastructure financing, utility connections, stormwater management, and subdivision design often determine whether infill and middle-density housing is practically buildable — even where zoning technically allows it.

The most effective housing strategies align zoning modernization with associated reforms, such as building codes that support smaller and more diverse housing types; coordinated permitting and inspection processes; and infrastructure investment targeted to infill and transit-served areas. Jurisdictions that treat zoning reform as one component of an integrated land-use and development system are more likely to see meaningful gains in housing production, predictability, and affordability.

As zoning reform continues to evolve from a policy objective to an implementation challenge, the central task ahead is coordination — ensuring that zoning, land-use regulation, building codes, and administrative processes work together rather than at cross-purposes. Where that alignment occurs, zoning reform can function as a powerful catalyst for housing supply.

## Appendix: Zoning Reform Highlights

### STATEWIDE ZONING REFORM

#### California: Comprehensive, Multi-Tool State Mandate Model

California has assembled the country's most complete and enforceable zoning reform framework, combining density, process, parking, and ADU reforms into a single ecosystem. California demonstrates how state mandates + enforcement + market-feasible entitlements can shift production at scale. Many later reforms elsewhere directly mirror its structure.

#### Signature elements

- SB 9 & SB 10 (lot splits, small multifamily, legislative upzoning)
- AB 2097 (parking minimums eliminated near transit)
- ADU reforms (by right, fee caps, preemption of local barriers)
- Housing element compliance tied to enforcement and penalties

### STATEWIDE ZONING REFORM

#### Oregon: Missing-Middle Legalization as a Baseline

Oregon's approach remains the clearest example of statewide legalization of missing-middle housing as a default condition, not an incentive. Oregon proved missing-middle reform is politically survivable, legally durable, and administratively scalable, making it a template for states such as Montana, Maine, and Vermont.

#### Signature elements

- HB 2001 (duplexes to fourplexes by right in most cities)
- Clear state guidance on implementation
- Subsequent refinements tied to climate and transportation goals

## STATEWIDE ZONING REFORM

### Maine: Uniform Local Code Reset

Maine's reforms go beyond single provisions and instead reset local zoning assumptions statewide. Maine shows how a smaller state can achieve near-universal zoning modernization quickly, especially in rural and small-city contexts often left out of reform narratives.

#### Signature elements

- LD 2003 (fourplexes by right in most communities)
- Statewide ADU legalization
- Reduced parking mandates
- Strong limits on local discretionary barriers

## STATEWIDE ZONING REFORM

### Colorado: Transit- and Process-Driven Reform

Colorado blends zoning reform with transportation, climate, and housing-needs planning, rather than treating land use in isolation. Colorado illustrates a next-generation model where zoning reform is embedded in broader infrastructure and climate strategies—especially relevant for fast-growing metros.

#### Signature elements

- Statewide TOD mandates and parking reform
- ADU legalization and incentives
- Housing needs assessments tied to local code updates
- Process reforms aimed at predictability and feasibility

## STATEWIDE ZONING REFORM

### Montana: Rural-Forward Missing-Middle Reform

Montana adapted missing-middle legalization for small cities and rural growth markets, not just large metros. Montana shows zoning reform is not a coastal or big-city phenomenon, and offers a persuasive model for interior and Mountain West states.

#### Signature elements

- Duplexes and townhomes legalized by right
- Reduced parking and dimensional barriers
- State preemption of exclusionary local standards

## LOCAL ZONING REFORM

### Boise's Parking Overhaul Opens the Door to New Infill Possibilities

<b>Location</b>	Boise, Idaho
<b>Reform Name</b>	Citywide Parking Reform
<b>Region</b>	Mountain West
<b>Reform Type</b>	Parking reform; streamlined/by-right approvals
<b>Geographic Scope</b>	Citywide

Through broad reductions and, in many districts, full elimination of off-street parking minimums, Boise unlocked redevelopment potential on narrow lots, older commercial parcels, and infill sites that previously could not accommodate required parking. By pairing these changes with objective design standards and streamlined approvals, Boise shows how parking reform can meaningfully expand buildable capacity even without major changes to underlying use or density permissions.

## LOCAL ZONING REFORM

### Minneapolis Proves How Powerful Parking Reform Can Be for Housing Supply

<b>Location</b>	Minneapolis, Minnesota
<b>Reform Name</b>	Parking Minimum Elimination
<b>Region</b>	Midwest
<b>Reform Type</b>	Parking reform
<b>Geographic Scope</b>	Citywide

Minneapolis offers one of the clearest examples of how eliminating off-street parking minimums can unlock immediate, on-the-ground housing production, especially for small and mid-scale infill. By removing parking requirements citywide for residential and mixed-use projects, the city reduced development costs and increased feasibility. The reform aligns land use with sustainability and multimodal goals.

## LOCAL ZONING REFORM

### Burlington Reinvents Residential Zoning with a Citywide Missing-Middle Code

<b>Location</b>	Burlington, Vermont
<b>Reform Name</b>	2024 Neighborhood Code (Citywide Missing-Middle Legalization)
<b>Region</b>	Northeast
<b>Reform Type</b>	Missing-middle housing legalization; form-based zoning; upzoning
<b>Geographic Scope</b>	Citywide

Burlington's 2024 Neighborhood Code overhaul offers one of the most comprehensive examples of citywide missing-middle legalization in the Northeast. The code expands infill housing capacity to allow at least a quadplex by right on every residential lot, plus units in secondary structures. The reform eliminates dwelling-unit caps, aligns with state HOME Act requirements, and normalizes multi-unit buildings across all neighborhoods. Burlington demonstrates how smaller cities can meaningfully address housing shortages through form-based regulation that is both context-sensitive and supply-oriented.

## LOCAL ZONING REFORM

### Madison Shows How Incremental Reform Can Transform Housing Capacity

<b>Location</b>	Madison, Wisconsin
<b>Reform Name</b>	Multi-Phase Missing-Middle, ADU, and Small Infill Reforms
<b>Region</b>	Midwest
<b>Reform Type</b>	Upzoning; missing-middle legalization; ADU reform; streamlined/by-right approvals
<b>Geographic Scope</b>	Citywide

Madison has pursued one of the Midwest’s most sustained zoning modernization efforts through a multi-year sequence of reforms that gradually reshape residential neighborhoods for gentle density. Beginning with duplex, triplex, and fourplex permissions in formerly single-family zones and followed by substantial ADU modernization, Madison has increasingly relied on objective standards and by-right approvals to streamline small-scale infill. The city’s 2025 amendments further clarify pathways for small residential projects. Madison illustrates how incremental, politically durable reform can cumulatively transform residential capacity across an entire city.

## LOCAL ZONING REFORM

### Pattern Zoning in Norfolk Demonstrates a Design-Driven Path to Missing-Middle Housing

<b>Location</b>	Norfolk, Virginia
<b>Reform Name</b>	Broad Creek Refresh Overlay & Missing-Middle Pattern Zoning
<b>Region</b>	South
<b>Reform Type</b>	Missing-middle legalization; form-based/pattern zoning
<b>Geographic Scope</b>	Targeted areas

Norfolk’s Broad Creek Refresh Overlay showcases how form-based and pattern zoning can enable missing-middle housing through predictable, visually grounded design standards. Rather than a simple upzoning, the overlay introduces pre-approved building types — duplexes, triplexes, townhomes, and small multi-unit buildings illustrated in the city’s *Missing-Middle Pattern Book*, and regulates development through frontage types instead of traditional use-based zoning. This approach expands small-scale housing options in a neighborhood-specific context while reducing discretionary review. Norfolk’s model demonstrates how cities can unlock gentle density in established neighborhoods by pairing expanded housing options with clear design guidance that streamlines approvals and builds community confidence.

## LOCAL ZONING REFORM

### Tampa Expands Housing Supply with State-Enabled By-Right Multifamily Development

<b>Location</b>	Tampa, Florida
<b>Reform Name</b>	Live Local Act Implementation
<b>Region</b>	South
<b>Reform Type</b>	Streamlined/by-right approvals
<b>Geographic Scope</b>	Citywide

Tampa has emerged as one of Florida’s most active jurisdictions implementing the state’s Live Local Act. The city created a formal administrative review process that allows qualifying mixed-income and affordable multifamily developments to bypass traditional zoning hearings, with state law preempting local limits on use, height, and density. By publishing clear procedures, eligibility standards, and guidance on calculating the “highest allowable” height and density, Tampa has translated state preemption into a predictable, by-right development pathway.

## LOCAL ZONING REFORM

### Denver Leverages Transit to Drive Housing Capacity Through Corridor-Based Incentive Overlays

<b>Location</b>	Denver, Colorado
<b>Reform Name</b>	Corridor-Based Height and Density Incentive Overlays
<b>Region</b>	Mountain West
<b>Reform Type</b>	Upzoning; TOD incentives; streamlined approvals
<b>Geographic Scope</b>	Transit corridors and station areas

Denver’s corridor-based height and density overlays illustrate how cities can tie zoning capacity to transit investment in a predictable, incentive-driven way. Adopted between 2021 and 2023, the overlays grant additional height and density for residential and mixed-use projects in key corridors and station areas. By concentrating growth in transit-rich locations, the reforms reduce entitlement risk, support climate and mobility goals, and enable mid- and high-density housing near high-frequency transit. Denver’s model combines TOD policy with by-right clarity, making it a strong example of how zoning can reinforce transportation infrastructure.

## LOCAL ZONING REFORM

### Mobile's Unified Development Code Brings ADUs Into the Mainstream

<b>Location</b>	Mobile, Alabama
<b>Reform Name</b>	Unified Development Code ADU Legalization
<b>Region</b>	South
<b>Reform Type</b>	ADU allowances; by-right approvals; code modernization
<b>Geographic Scope</b>	Citywide

Mobile's adoption of a consolidated Unified Development Code marked a turning point for ADUs in a zoning environment that had long segregated land uses. Rather than treating accessory units as a narrow exception, the 2022 UDC integrates ADUs as a permitted residential housing option across applicable zoning districts. By embedding ADUs within a broader code overhaul, Mobile made small-scale infill a feasible option for home owners. The reform illustrates how ADUs are increasingly introduced not as standalone fixes, but as part of comprehensive zoning modernization efforts.

## LOCAL ZONING REFORM

### Fayetteville Aligns Local Zoning With State ADU Mandates

<b>Location</b>	Fayetteville, Arkansas
<b>Reform Name</b>	Ordinance 6870 – Accessory Dwelling Unit Amendments
<b>Region</b>	South
<b>Reform Type</b>	ADU allowances; by-right approvals; state/local alignment
<b>Geographic Scope</b>	Citywide

Following Arkansas's requirement that cities permit ADUs, Fayetteville amended its zoning ordinance to allow accessory units by right in residential districts, standardizing development rules and eliminating discretionary barriers that previously limited uptake. The ordinance focuses on defining unit types, streamlining approvals, and aligning dimensional standards with typical lot conditions to help make ADUs a realistic housing option. Fayetteville's approach highlights a growing pattern in second-generation ADU reforms: translating state authorization into locally workable, administratively simple regulations that support small-scale housing production while maintaining predictable neighborhood form.