NHI Housing Development Toolkit

Strategies for Housing Developers and Nonprofits/CBOs in Developing LGBT-Affirming Affordable Elder Housing
Purpose/Mission of Toolkit

Naming the Need
LGBTQ people face disproportionate rates of discrimination and poverty, including a shared history of community trauma involving both interpersonal and systemic discrimination. This has impacted LGBT elders in a myriad of ways around disparate health outcomes and unequal access. This might manifest in compounded isolation due to the absence of support from family of origin; increased vulnerability for elder abuse, caretaker abuse, intimate partner violence, and service provision exclusion; and decreased access to economic stability and wealth accumulation, which highlights the social disparities elders are living with based on their histories of discrimination.

Toolkit will Address this Need By
• Providing best practices based on SAGE’s housing development process, as well as leading trailblazers across the country
• Helping to imagine your goals, identify necessary parts of the process, and provide a roadmap to get there with unique attention to your specific location and community need
• Identifying common challenges and temper expectations to inform planning and holistic preparedness
• Sharing worksheets and planning tools to break the process down into manageable steps

Background of SAGE and NHI
Mission: SAGE leads in addressing issues related to lesbian, gay, bisexual and transgender (LGBT) aging. In partnership with its constituents and allies, SAGE works to achieve a high quality of life for LGBT older people, supports and advocates for their rights, fosters a greater understanding of aging in all communities, and promotes positive images of LGBT life in later years.

SAGE’s National LGBT Elder Housing Initiative addresses the challenges of housing affordability, emotional and physical safety, and aging with dignity in community on several fronts by:
• Building LGBT-friendly housing in New York City
• Advocating nationally against housing discrimination
• Training eldercare providers to be LGBT culturally competent
• Educating you about your housing rights
• Helping builders across the U.S. replicate LGBT-friendly housing

Context of Affordable Housing
One housing intervention for LGBT older people is the creation of LGBT-affirming affordable elder housing. While available to anyone meeting the housing community’s criteria, regardless of sexual orientation and gender identity, these affordable developments are designed specifically to meet the needs of LGBT older people. The goal of this housing model is to create inclusive communities where any sexual orientation and gender identity is embraced, and diversity is celebrated, focusing on creating LGBT-affirming and inclusive environments with LGBT culturally competent staff and LGBT-focused programming.

For more contextual information on LGBT-affirming affordable elder housing, please see SAGE’s “Understanding the Affordable Housing Development Process Primer.”

This toolkit was made possible with the generous support of The Harry and Jeanette Weinberg Foundation.
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NHI HOUSING DEVELOPMENT TOOLKIT

Section 1: Community Outreach, Engagement, and Involvement: Buy-in Strategy
Section 1: Community Outreach, Engagement, and Involvement: Buy-In Strategy

One key first step is developing buy-in from the community and political leaders. Buy-in simply means to support and believe in an idea or concept. To do this, think about the following:

Identify and speak to existing relationships:
- Elected officials
- Community boards
- Community residents
- Community organizations

Develop and nourish new relationships.

Assess the neighborhood and become and remain involved with the community.

Engage with established communities, with reverence to today’s economic and political context:
- Engage with and reach out to communities of color, LGBTQ residents, and long-term residents
- Center intersectionality, and take into account the historical context of space and displacement
- Identify who you can sign linkage agreements for your own capacity and to nurture partnerships
- Identify who is already doing work you can uplift without reproducing or co-opting

Outreach strategy: Where do people you want to reach congregate? Go to them! (Places of worship, community centers, political convenings, etc.)

Outreach strategy: Host public information sessions as well as feedback sessions to both inform and be informed by the community.

Outreach strategy: Engage with community leaders at the very beginning across various sectors/roles.

HELPFUL TIP

In conducting outreach, keep detailed outreach and presentation logs

Be methodical about documenting outreach attempts for transparency andsolid outreach strategy, but also to report to city and elected officials who will need to know and ask who, how, and when people were reached. Elected officials will ask you for this information many times throughout the process.

Documenting allows you to see where you are NOT reaching people, so draw a map. Reflect the community you are building in, and then you can reach out to areas you haven’t yet reached.

Archive your work for outreach purposes, but also for evidence to community partners and elected officials.

Keep detailed records of WHO was reached and how, how many times, and how to contact folks.

Think about how to remain in contact for relationship-building and to strategically reach a larger base of people—keep folks informed along the way!

APPENDIX TOOL

Analytical Problem-Solving Worksheet

Think about your long and short-term goals, and strategies to get there. Is this feasible?
Under federal Fair Housing Law, government agencies, banks, and elected officials need to know this information of where you are doing outreach, how, and to whom, so chronicle it:

- How many people in a city, borough, community board, or in an elected official’s district did you reach?
- Chronicle demographics by address, not by race or ethnicity if people fear discrimination.

**APPENDIX TOOL**

*Power Map*

A power map is a simple organizing tool to identify stakeholders with interest, stakeholders with decision-making power, and who to bring in accordingly.
## APPENDIX TOOL: Analytical Problem-Solving Worksheet

<table>
<thead>
<tr>
<th>Step</th>
<th>Remember</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Environment of the problem</strong>&lt;br&gt;Nature of the problem to solve, underlying issues</td>
<td>Why is this a problem? Why do we care? Name goals!</td>
<td></td>
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<tr>
<td><strong>Stakeholders</strong>&lt;br&gt;Who is involved?</td>
<td>Identify relevant/current stakeholders, who is a player and what is their role? Be exhaustive.</td>
<td></td>
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<tr>
<td><strong>Central Issue</strong>&lt;br&gt;Central Problem/Issue</td>
<td>How can you work to address or solve this issue, or a piece of this issue? Name goals and objectives through exploring the problem!</td>
<td></td>
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<tr>
<td><strong>Identify Alternatives</strong>&lt;br&gt;Options, interventions, and choices—what are your range of options to solve the problem? Take organizational capacity into account.</td>
<td>Research what is relevant, hone in. Name constraints (legal, costs, etc.). Acknowledge underlying issues while sticking to the larger goal. If your plan is not feasible, that's ok and an important conclusion to recognize!</td>
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<tr>
<td><strong>Identify Criteria</strong>&lt;br&gt;Develop 3-5 (typically) criteria to evaluate each alternative solution.</td>
<td>Develop measures to assess, i.e.: dollars, feasibility, time, efficiency, staff labor, # of stakeholders supporting, etc. Then measure your options quantifiably.</td>
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<tr>
<td><strong>Analysis</strong>&lt;br&gt;Apply criteria to each alternative solution, project outcomes and probability</td>
<td><em>Alternative 1</em>: Measured by Criteria 1, 2, and 3  <em>Alternative 2</em>: Measured by Criteria 1, 2, and 3  Etc....</td>
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<tr>
<td><strong>Decision &amp; Next Steps</strong></td>
<td>Base this on detailed, quantifiable analysis, what is the final plan?</td>
<td></td>
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</table>
APPENDIX TOOL: Power Map

Most Decision-Making Power

Strongly Oppose Your Objective           Strongly Support Your Objective

Least Decision-Making Power
NHI HOUSING DEVELOPMENT TOOLKIT

Section 2: Community Outreach, Engagement, and Involvement: Reaching Tenants in Need
Section 2: Community Outreach/Marketing, Engagement, and Involvement: Reaching Tenants in Need

Reaching LGBT elders in need of affordable housing requires intentionality, creativity, and planning. Develop a plan of how you are going to reach the people who may be underserved and can benefit most from this housing and meet them where they are at.

Map out a detailed and structured outreach/marketing strategy from the beginning through the lease-up process and don’t forget to include a budget for designing assets, posting ads, and printing materials.

Use a variety of platforms to provide information accessible to LGBT elders:

- Use print materials – don’t just focus online. Make sure you budget for advertising in local newspapers, interest magazines, flyers, postcards and other mailers.
- Cater to the spectrum of how people connect across age groups to create successful reach (website, Facebook, emails, robo-calls, text messages, etc.).
- In-person community forums/workshops (see below).
- Create an email newsletter and have interested participants sign-up to receive updates and information on the application process.
- Create different outreach plans for each population you are trying to reach. For example, concentrated outreach to transgender and gender-nonconforming elders will look different than to Spanish-speaking elders.
- Create a dedicated webpage with information on the project and an email sign-up form for folks to sign-up for updated information.

In-person outreach: Go to the communities you will build in and the demographics you aim to serve

- Provide easy to understand presentations with lots of details, including photos of the project, financial requirements, and amenities included.

HELPFUL TIP
First-Come First-Serve Tenant Applications

When you go live on application day, be READY and have a multi-pronged outreach strategy (social media, emails, phone calls and texts). Think about hosting an in-person application day (via RSVPs) with volunteers assisting on computers and tablets. Make sure applicants know what information they need to provide well in advance of application day.

- Create brochures with information about the residences that showcase positive imagery of aging elders.
- Design postcards or flyers with a simple form for people to fill out during in-person outreach and make sure they opt-in to emails (if they have an email address). That way you can communicate with them regularly about the building’s progress and also important information about the application process.
- Design large posters with an easy-to-read typeface with information and a sign-up link for potential applicants.

Outreach strategy: Tenant Engagement Tactics

Where do you reach prospective tenants?

- Community Forums
- Religious and social groups
• Community organizing leaders—people with deep connections to local community
• Aging and medical institutions
• Community centers

**Outreach strategy: Tenant Engagement Framing Questions**

Keep these questions in mind as you conduct tenant outreach.

- Who are you reaching and how are you reaching them?
- Where can you reach folks you are not?
- How does your mission impact who you are housing?
- What draws people in or shuts them out?
- How do you maximize diversity and reach deeply vulnerable communities?

**Outreach strategy: Tenant Communications**

Here are some ways to communicate with prospective tenants along each step of the way, including once they are housed.

- Embody transparency to tenants from the start, through lease-up and once they are housed:
- Clarity on unit size, amenities, building regulations
- Clarity on guest protocols
- Define "LGBT-affirming," "LGBT-friendly," "LGBT-inclusive" and other terminology used in communications

- Create avenues for internal tenant communication and community building:
  - Online forums
  - Lobby community boards
  - Tenant associations
- Ensure economic and community expectations defined in tenant onboarding meetings:
  - Outline of financial obligations (rent, utilities, security deposit) explained
  - Signed community agreements around safety, behavior, and anti-oppression
  - Cultural competency infused throughout the building – library books available, art in the building, rainbow or transgender flags in offices, etc.)

**APPENDIX TOOL**

**Outreach Strategy Worksheets**

Documenting your work is a critical component of outreach, methodology, and community accountability. Use these simple frameworks to help map and archive your work.
APPENDIX TOOL: Outreach Strategy Worksheets

Where do people you want to reach congregate? Map it out.
*Identify who you may be missing, with equity in mind*

Where and how to reach them…

- Community Members
- Business Owners
- Social, Religious, and Community Institutions
# Community Leader Outreach Log

<table>
<thead>
<tr>
<th>Date</th>
<th>Name &amp; Title</th>
<th>Email/Phone</th>
<th>Notes/Next Steps</th>
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**APPENDIX TOOL: Outreach Strategy Worksheets**

**Public Information Session Log**

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___________________________________________
(Session Title, Date, Location)
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<tr>
<th>Name</th>
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NHI HOUSING DEVELOPMENT TOOLKIT

Section 3: Marketing and Press Plan
Your marketing and press engagement require research of the community landscape, data on where you need to reach folks, and framing based on your intended audience – which you should have done in Section 2. In essence: know and map out your audience before promoting any assets and include them in the process, when applicable. Publicizing your project with intentionality will align with your mission and demonstrate an accountability to the community and to future tenants.

**Marketing**

As mentioned in Section 2, mapping out a detailed and structured outreach strategy from the beginning through the lease-up process is key – and marketing plays a large role in that outreach. In addition to the strategies in Section 2, take note of:

**Broader outreach.** Keep in mind, advertising the residence might be required in a variety of publications due to other agencies involved. Be sure to take note if this is required and plan/budget accordingly.

**Fair Housing Regulations.** Take a look at our “Helpful Tips” for marketing ideas under Fair Housing Regulations. Most developments can’t say it’s LGBTQ-exclusive or it would violate fair housing laws.

**Press Engagement**

In addition to marketing your housing to the applicants, it is important to place your facility and its crucial story in the public eye. This will provide “earned media” or free marketing for the residence. Engaging with reporters who cover housing or LGBT issues, social issue media outlets (both online and print), as well as local papers, will provide increased awareness in your project. Think about conducting media events linked to the groundbreaking, topping-out and your grand opening.

Make sure you have:

### HELPFUL TIPS

**Marketing Under Fair Housing Regulations**

How to create intentional community that is not exclusive:

- Explicitly communicate in marketing that this is an oppression-free space
- Use visual representation and indicators in marketing, forms, and physical infrastructure (flags, photos of LGBT community leaders, etc)
- If possible, include LGBT elder-affirming programming in marketing
- Marketing in LGBT-centered spaces and publications, as well as the broader community
- Appropriately train all staff involved in press or marketing work in order for them to understand the implications of the fair Housing Act

- **Talking points about the project.** Include basic information about the facility and its amenities, but also the larger need for LGBT-friendly housing, and any statistics on LGBT older people in your area. This will help you easily create media advisories and press releases, as well as educating potential spokespeople and stakeholders.
- **Visuals.** Having a variety of architectural renderings, photos of project milestones, and completed photos of the building and its spaces are helpful for both marketing materials and members of the press. Short videos highlighting the space and construction are also useful for online marketing and press outlets.
• **Spokespeople.** Utilizing key staff and experts who are familiar with both the project and LGBT issues are key when trying to obtain earned media. Additionally, utilizing LGBT elders who are seeking housing or those who have been admitted are your strongest storytellers. Their lived experience is invaluable when pitching stories to the media.

*A note on tokenization in the media:*
Develop ways to ethically engage with vulnerable communities in marketing and publicity strategies

• While having spokespeople available to talk about their excitement in applying for housing is key, a person’s housing cannot be, or appear to be, contingent on speaking to press or being featured in marketing materials
• Housing security should be established and confirmed before asking tenants to speak to the press for your agency

• Visibility of diverse communities is always important when matched with accountability and empowerment each step of the way

**Make sure to Understand the Fair Housing Act in Marketing Materials**

• Gender identity and sexual orientation are not explicitly protected classes under fair housing regulations
• Federally protected classes include race, color, national origin, sex, religion, familial status, and disability
• Work has been done to establish LGBT-based discrimination as illegal under “sex” classification
• Use language such as “affirming” or “friendly” to denote LGBT competency without breaching fair housing regulations
• Market to LGBT-centered spaces and publications, with attention paid to geographic, racial, and cultural diversity

**APPENDIX TOOL**

*Personal Identity Wheel Exercise*
Engage in personal reflection around the privileged or oppressed identities you bring to this work, helping to inform your own equity lens.

**APPENDIX TOOLS**

*SAGE’s marketing communications for LGBT-welcoming elder housing in NYC*
APPENDIX TOOL: Personal Identity Pie

1. Write down all of the identities you hold, trying to be as exhaustive as possible (i.e. your race, ethnicity, abilities, gender, place of origin, sexual orientation, etc.)

2. Categorize each identity as:
   Oppressed (O): An identity that is the target of oppression/discrimination
   Privileged (P): An identity that is privileged

3. Using the circle below, create a pie chart that shows your identities, with the size of each pie piece relating to how aware you are of each identity on a daily basis.

Writing and Discussion Prompts:

1. Which identities were you more aware of? Why do you think this is?
2. Which identities are missing from the pie, or may be taken for granted? Why do you think this is?
3. From this exercise, can you identify one or two identities in which you need to work on being more aware of?
4. Think about how this informs your own community engagement and how it can benefit or hinder your outreach strategies and content.
**APPENDIX TOOL:**
**SAGE’s Housing Marketing: LGBT-friendly communities**

*SAGE conducted focus groups with its members before creating the final ad series for both of its LGBT-welcoming elder housing. The ads featured different language choices, color schemes, building imagery, and real-life SAGE members. The ads below were the two chosen by the SAGE team after focus group testing. These ads were used in print outlets, digital media, and printed as postcards and in large poster size for placement at SAGE centers across New York City. A dedicated webpage existed for people to sign-up to learn more about both housing opportunities and receive time-sensitive information about the housing process.*
APPENDIX TOOL: SAGE’s Housing Marketing: General audience

In addition to SAGE’s outreach to LGBT-welcoming communities and SAGE members, SAGE was required to place full-page ads in a variety of community newspapers for a specific amount of time, so be sure to set aside a budget and create a proper timeline for ad creation, approval and placement. When working with different partners, especially city or town agencies, keep in mind requirements for recruiting interested tenants. This could include unit information, income eligibility, household size, application information, and more. Below is a sample of a full-page ad SAGE placed for its Crotona Pride House.

**AFFORDABLE HOUSING FOR RENT**

**CROTONA SENIOR HOUSING: Featuring a Lesbian, Gay, Bisexual, and Transgender (LGBT)-Friendly Senior Center and Services**

67 NEWLY CONSTRUCTED UNITS AT 274-77 Crotona Park North, Bronx

A safe and warm environment for older adults, SAGE’s senior center offers services and programs that enrich the minds and bodies of older adults. Although services are provided by SAGE, SAGE staff are trained in LGBT awareness and support, and each resident is evaluated for eligibility by SAGE. This could include

- Monthly/weekly activities
- Specialized services
- Nutritional meals

When working with different partners, especially city or town agencies, keep in mind requirements for recruiting interested tenants. This could include

- Unit information
- Income eligibility
- Household size
- Application information

Below is a sample of a full-page ad SAGE placed for its Crotona Pride House.

**Who Should Apply?** Individuals or households who are 55 years of age or older must meet the income and household size requirements listed in the table below. Applicants who do not meet the criteria below must meet additional selection criteria. Applicants who do not meet the criteria below must meet additional selection criteria. Applicants who do not meet the criteria below must meet additional selection criteria.

**A Percentage of units is set aside for:**
- Elderly-applicants (15%)
- Gay, Lesbian, Bisexual, and Transgender-applicants (15%)
- People living with disabilities (15%)
- People living with disabilities (15%)
- People living with disabilities (15%)

**Preferential housing for a percentage of units goes to:**
- Residents of Bronx Community District 5 (10%)
- Municipal employees (10%)

**AVAILABLE UNITS AND INCOME REQUIREMENTS**

<table>
<thead>
<tr>
<th>Unit Size</th>
<th>Units Available</th>
<th>Household Size*</th>
<th>Annual Household Income**</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 bedroom</td>
<td>18</td>
<td>1 person</td>
<td>$30,000 - $37,300</td>
</tr>
<tr>
<td>2 bedrooms</td>
<td>27</td>
<td>1 person</td>
<td>$32,200 - $37,300</td>
</tr>
<tr>
<td>2 bedrooms</td>
<td>27</td>
<td>2 people</td>
<td>$32,200 - $42,700</td>
</tr>
</tbody>
</table>

* Household size includes everyone who will live with you, including parents and children. Subject to occupancy criteria.

This is an example of a full-page ad SAGE placed for its Crotona Pride House.