

SAGE NATIONAL LGBTQ+ ELDER HOUSING INITIATIVE



SAGE's Housing Development Toolkit

Strategies for Housing Developers and Nonprofits/CBOs in Developing LGBTQ-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 LGBTQ+ 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, transgender, and queer/questioning (LGBTQ+) aging. In partnership with its constituents and allies, SAGE works to achieve a high quality of life for LGBTQ+ older people, supports and advocates for their rights, fosters a greater understanding of aging in all communities, and promotes positive images of LGBTQ+ life in later years.

SAGE's National LGBTQ+ Elder Housing Initiative addresses the challenges of housing affordability, emotional and physical safety, and aging with dignity in community on several fronts by:

- Building LGBTQ-friendly housing in New York City

- Advocating nationally against housing discrimination
- Training eldercare providers to be LGBTQ+ culturally competent
- Educating you about your housing rights
- Helping builders across the U.S. replicate LGBTQ-affirming housing

Context of Affordable Housing

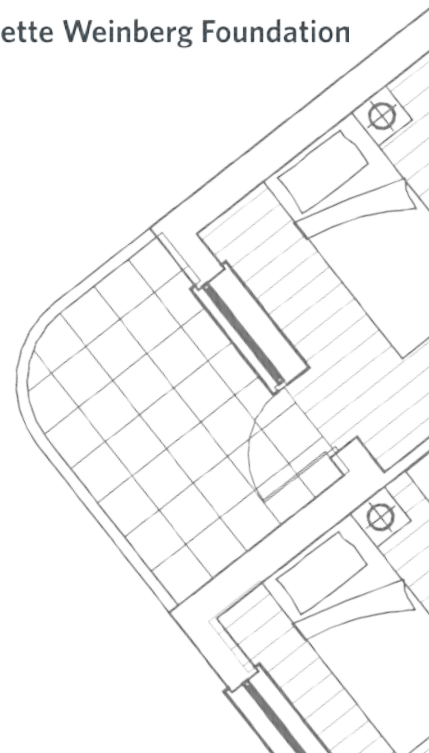
One housing intervention for LGBTQ+ older people is the creation of LGBTQ-affirming affordable elder housing. While available to anyone meeting the housing community's criteria, regardless of sexual orientation and gender identity, these affordable developments are designed specifically to meet the needs of LGBTQ+ 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 LGBTQ-affirming and inclusive environments with LGBTQ+ culturally competent staff and LGBTQ-focused programming.

For more contextual information on LGBTQ-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.



The Harry and Jeanette Weinberg Foundation



The background of the entire page is a light gray architectural floor plan. It shows various rooms, including what appears to be a kitchen with a sink and stove, a bathroom with a toilet and bathtub, and several bedrooms with beds. There are also decorative elements like a circular table in a common area and a floral motif. The lines are thin and light, creating a subtle grid-like structure.

**SAGE NATIONAL LGBTQ+
ELDER HOUSING INITIATIVE**

SAGE'S HOUSING DEVELOPMENT TOOLKIT

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

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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 and solid 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?

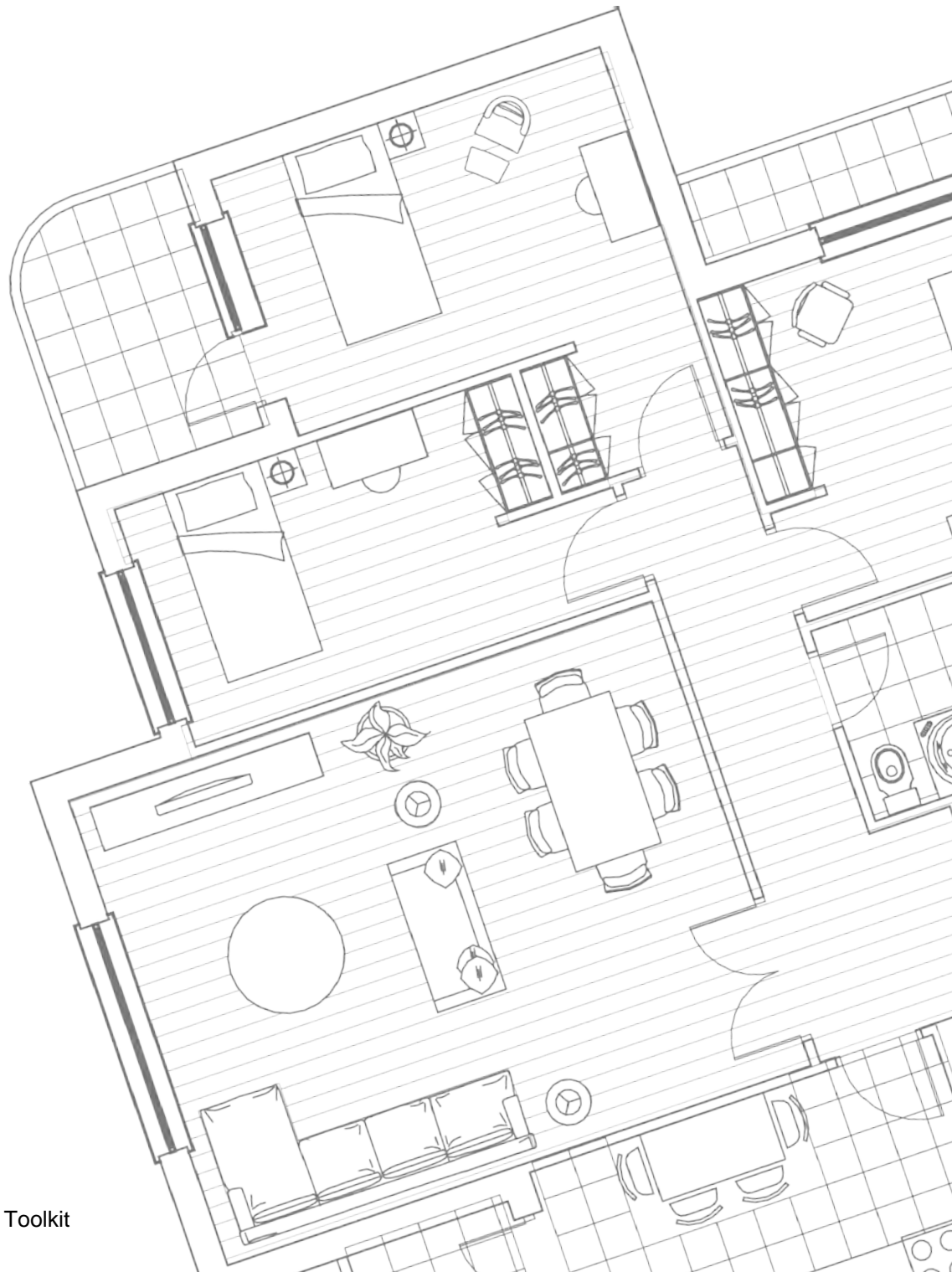
Under federal Fair Housing Law, government agencies, banks, and elected officials need to know this information of where you are doing outreach, how, and to whom, so chronicle it

- 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— people may fear discrimination

APPENDIX TOOL

Power Map

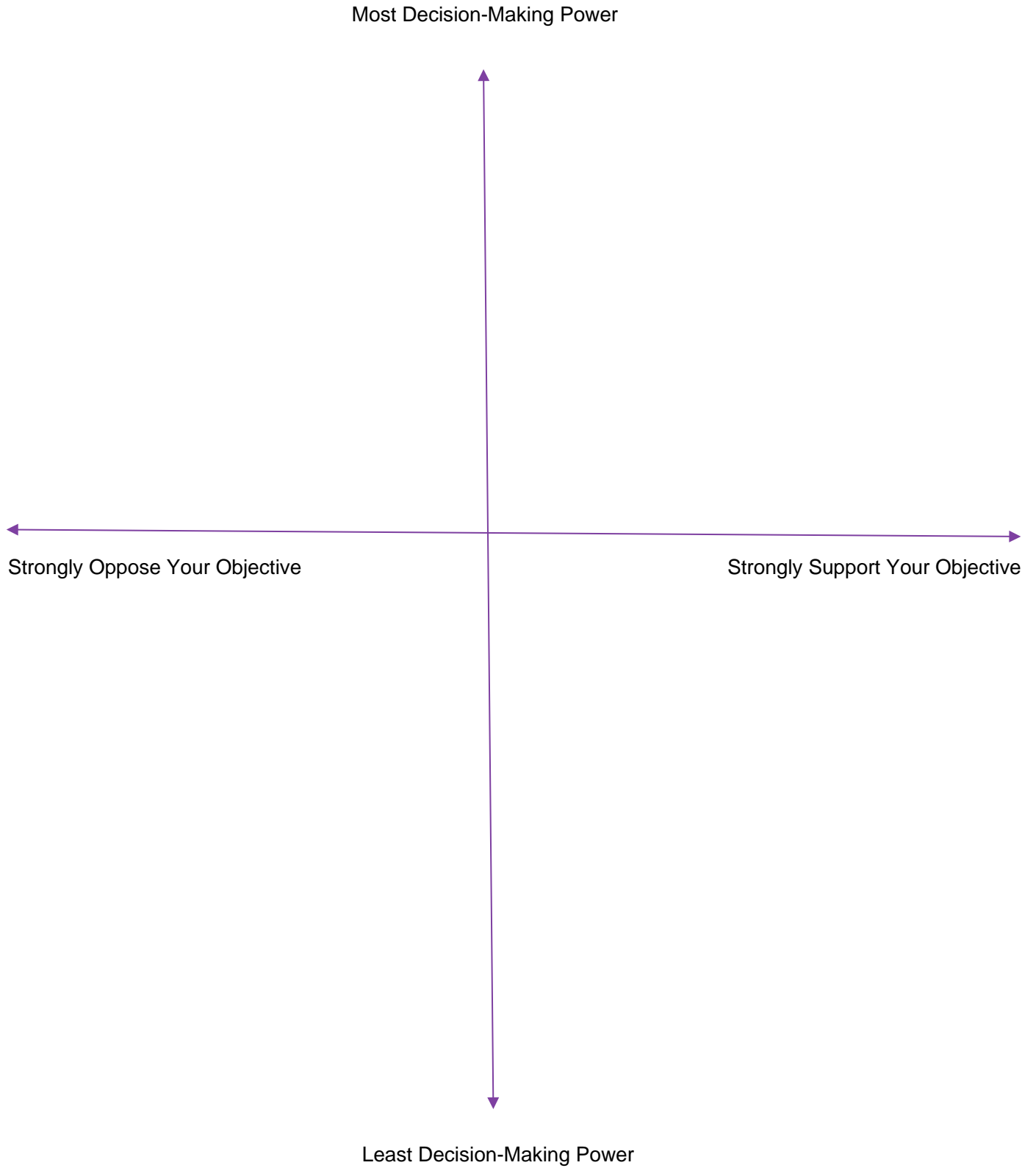
A power map is a simple organizing tool to identify stakeholders with interest, stakeholders with decision-making power, and who to bring in accordingly.



APPENDIX TOOL: Analytical Problem-Solving Worksheet

Step	Remember	Notes
Environment of the problem Nature of the problem to solve, underlying issues	Why is this a problem? Why do we care? Name goals!	
Stakeholders Who is involved?	Identify relevant/current stakeholders, who is a player and what is their role? Be exhaustive.	
Central Issue Central Problem/Issue	How can you work to address or solve this issue, or a piece of this issue? Name goals and objectives through exploring the problem!	
Identify Alternatives Options, interventions, and choices—what are your range of options to solve the problem? Take organizational capacity into account.	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!	
Identify Criteria Develop 3-5 (typically) criteria to evaluate each alternative solution.	Develop measures to assess, i.e.: dollars, feasibility, time, efficiency, staff labor, # of stakeholders supporting, etc. Then measure your options quantifiably.	
Analysis Apply criteria to each alternative solution, project outcomes and probability	<i>Alternative 1:</i> Measured by Criteria 1, 2, and 3 <i>Alternative 2:</i> Measured by Criteria 1, 2, and 3 Etc....	
Decision & Next Steps	Base this on detailed, quantifiable analysis, what is the final plan?	

APPENDIX TOOL: Power Map



The background of the entire page is a detailed architectural floor plan of a residential building. It shows various rooms, including bedrooms with beds, a living area with a sofa and coffee table, a kitchen with a stove and sink, and a bathroom. There are also decorative elements like a large circular table and a plant. The lines are thin and light gray, creating a technical drawing aesthetic.

**SAGE NATIONAL LGBTQ+
ELDER HOUSING INITIATIVE**

SAGE'S HOUSING DEVELOPMENT TOOLKIT

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

2

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

Reaching LGBTQ+ 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 LGBTQ+ 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

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.

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

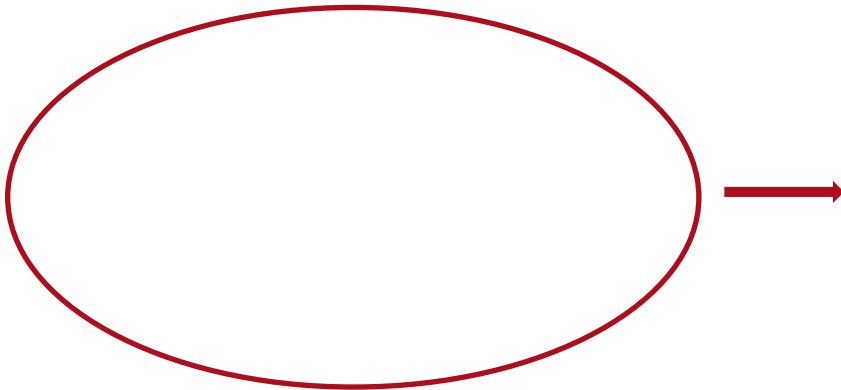


APPENDIX TOOL: Outreach Strategy Worksheets

Where do people you want to reach congregate? Map it out.

Identify who you may be missing, with equity in mind

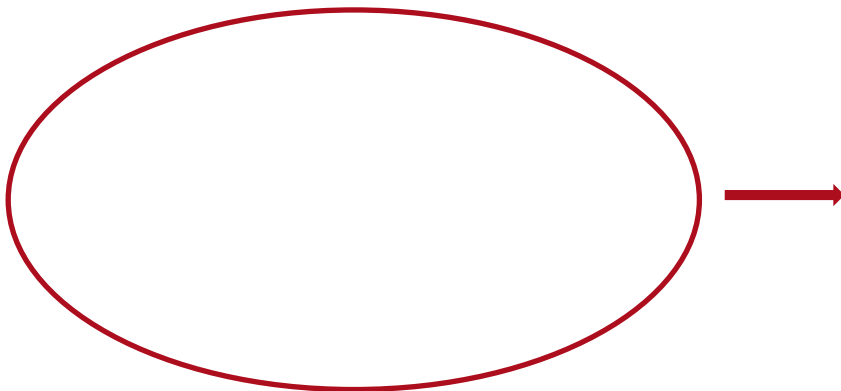
Where and how to reach them...



Community Members



Business Owners



Social, Religious, and Community Institutions

APPENDIX TOOL: Outreach Strategy Worksheets

Community Leader Outreach Log

Date	Name & Title	Email/Phone	Notes/Next Steps

APPENDIX TOOL: Outreach Strategy Worksheets

Public Information Session Log

(Session Title, Date, Location)

Name	Address	Email

The background of the entire page is a detailed architectural floor plan of a residential building. It shows various rooms including bedrooms with beds, a kitchen with a stove and sink, a bathroom with a toilet and shower, and a living area with a table and chairs. The drawing is in a light grey line-art style.

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**Section 3: Marketing and
Press Plan**

3

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 LGBTQ+ 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.

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 LGBTQ+ community leaders, etc)
- If possible, include LGBTQ+ elder-affirming programming in marketing
- Marketing in LGBTQ-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

Make sure you have:

- **Talking points about the project.** Include basic information about the facility and its amenities, but also the larger need for LGBTQ-friendly housing, and any statistics on LGBTQ+ 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 LGBTQ+ issues are key when trying to obtain earned media. Additionally, utilizing LGBTQ+ 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 LGBTQ-based discrimination as illegal under "sex" classification
- Use language such as "affirming" or "friendly" to denote LGBTQ+ competency without breaching fair housing regulations
- Market to LGBTQ-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.

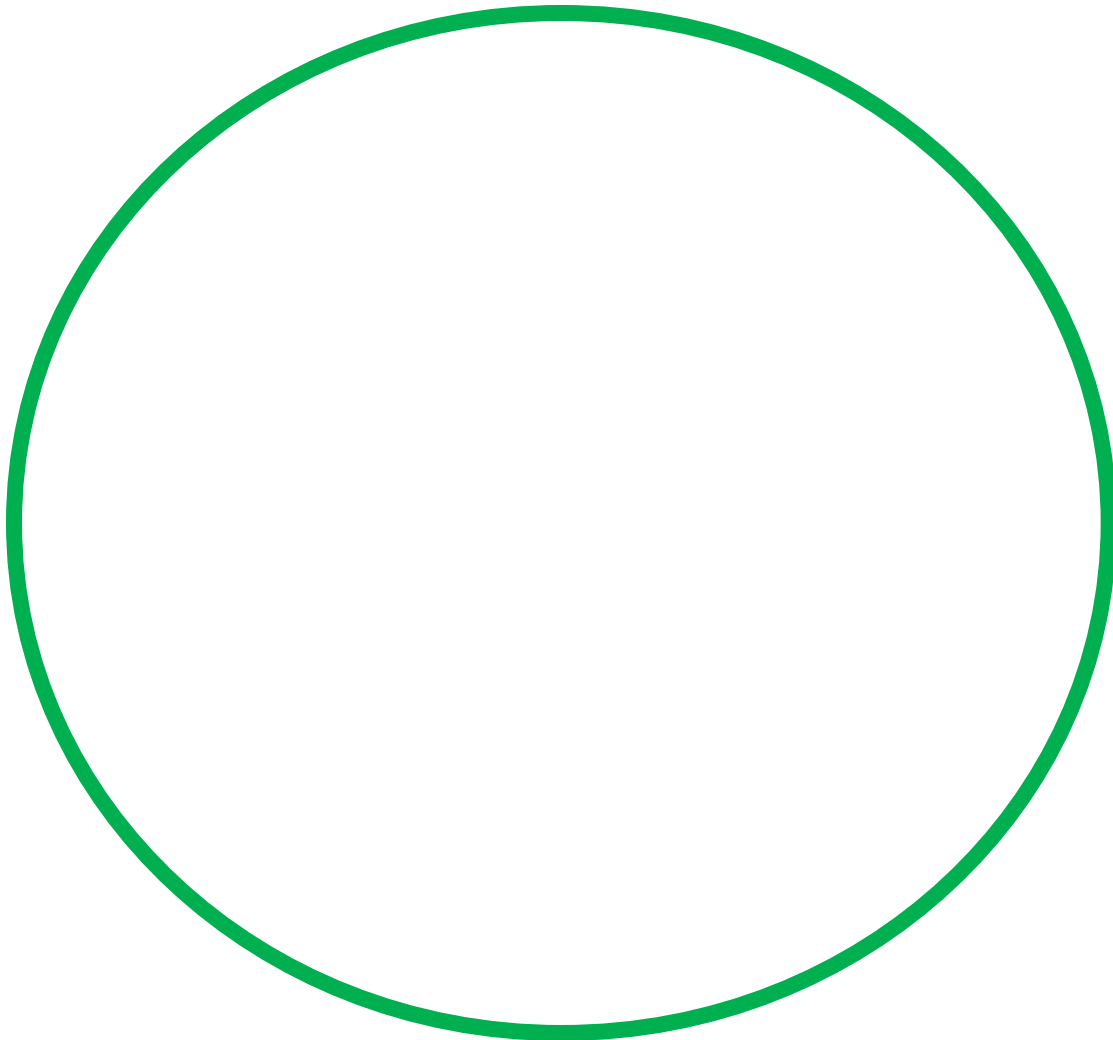
APPENDIX TOOL

SAGE's marketing communications for LGBTQ-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: LGBTQ-friendly communities

SAGE conducted focus groups with its members before creating the final ad series for both of its LGBTQ-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.

sage Advocacy & Services for LGBTQ Elders
We refuse to be invisible

this is *home*
this is **Community**

A place to call home that's as fabulous as you are! Check out SAGE's new LGBT-welcoming affordable housing for people aged 62+.

All the benefits of SAGE where you live:

- LGBT-Welcoming
- SAGE Center
- New Amenities
- Affordable

Applications opening soon.
Learn more at:
sageusa.org/myhousing

sage Advocacy & Services for LGBTQ Elders
We refuse to be invisible

home
fabulous
home

Welcome home! Sign up for affordable LGBT-welcoming housing for people aged 62+ and find a place where you can be your spectacular self.


All the benefits of SAGE where you live:

- LGBT-Welcoming
- SAGE Center
- New Amenities
- Affordable


Applications opening soon.
Learn more at:
sageusa.org/myhousing

APPENDIX TOOL: SAGE's Housing Marketing: General audience

In addition to SAGE's outreach to LGBTQ-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



This building is being constructed through the SARA program of the New York City Department of Housing Preservation and Development and New York Homes and Community Renewal.

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

57 NEWLY CONSTRUCTED UNITS AT 774-775 Crotona Park North, Bronx

Amenities: A state-of-the-art, inclusive, LGBT-friendly senior center offering services and programs related to the arts and culture, fitness, food and nutrition, health and wellness operated by SAGE (Services & Advocacy for Lesbian, Gay, Bisexual and Transgender Elders), a non-profit advocacy and services organization with a focus and expertise on serving the LGBT senior community. Onsite residential services, also provided by SAGE, will be available to all interested tenants. For more information on SAGE, visit their website at <https://sagenyc.org>. The residential building contains a community room, roof terrace, bike storage, laundry, and a community sitting area on each floor.

Transit: 2/6, Bx17, Bx18, Bx40, Bx42
No application fee • No broker's fee • Smoke-free building

- Who Should Apply?** Individuals or households who are 62 years or older meet the income and household size requirements listed in the table below may apply. Qualified applicants will be required to meet additional selection criteria. Applicants who live in New York City receive a general preference for apartments.
- A percentage of units is set aside for:
 - Mobility-disabled applicants (10%)
 - Vision/Hearing-disabled applicants (4%)
 - Preference for a percentage of units goes to:
 - Residents of Bronx Community District 6 (50%)
 - Municipal employees (5%)

AVAILABLE UNITS AND INCOME REQUIREMENTS

Unit Size	AREA MEDIAN INCOME (AMI) UNITS	Units Available	Household Size*	Annual Household Income ¹ Minimum—Maximum ²
studio	50%	30	1 person	\$30,060 - \$37,350
1 bedroom		27	1 person	\$32,220 - \$37,350
			2 people	\$32,220 - \$42,700

¹ Household size includes everyone who will live with you, including parents and children. Subject to occupancy criteria.
² Household earnings include salary, hourly wages, tips, Social Security, child support, and other income. Income guidelines subject to change.
³ Minimum income listed may not apply to applicants with Section 8 or other qualifying rental subsidies. Asset limits also apply.

How Do You Apply?
 Apply online or through mail. To apply online, please go to nyc.gov/housingconnect. To request an application by mail, send a self-addressed envelope to: HELP Crotona Park LLC, 115 East 13th Street, New York, NY 10003. Only send one application per development. Do not submit duplicate applications. Do not apply online and also send in a paper application. Applicants who submit more than one application may be disqualified.

When is the Deadline?
 Applications must be postmarked or submitted online no later than [ENTER DEADLINE DATE]. Late applications will not be considered.

What Happens After You Submit an Application?
 After the deadline, applications are selected for review through a lottery process. If yours is selected and you appear to qualify, you will be invited to an appointment of eligibility to continue the process of determining your eligibility. Appointments are usually scheduled from 2 to 10 months after the application deadline. You will be asked to bring documents that verify your household size, identity of members of your household, and your household income.

Español
 Presente una solicitud en línea en nyc.gov/housingconnect. Para recibir una traducción de español de este anuncio y la solicitud impresa, envíe un sobre con la dirección a: HELP Crotona Park LLC, 115 East 13th Street, New York, NY 10003. En el reverso del sobre, escriba en inglés la palabra "SPANISH." Las solicitudes se deben enviar en línea o con sello postal antes de [ENTER DATE IN SPANISH].

簡体中文
 访问 nyc.gov/housingconnect 在线申请。如果获取本广告及书面申请的简体中文版，请将您的回信信封寄送至：HELP Crotona Park LLC, 115 East 13th Street, New York, NY 10003。信封背面请用英语注明“CHINESE”，必须在以下日期之前在提交申请或邮寄书面申请 [ENTER DATE IN CHINESE]。

Русский
 Чтобы подать заявление через интернет, зайдите на сайт: nyc.gov/housingconnect. Для получения данного объявления и заявления на русском языке отправьте конверт с обратным адресом по адресу HELP Crotona Park LLC, 115 East 13th Street, New York, NY 10003. На обратной стороне конверта напишите слово "RUSSIAN" на английском языке. Заявки должны быть поданы онлайн или отправлены по почте (согласно дате на конверте или письме) не позднее [ENTER DATE IN RUSSIAN].

한국어
nyc.gov/housingconnect 에서 온라인으로 신청하십시오. 이 광고문과 신청서에 대한 한국어 번역본을 받아보시려면 발송용 봉투를 HELP Crotona Park LLC, 115 East 13th Street, New York, NY 10003으로 보내주세요. 봉투 뒷면에 "KOREAN" 이라고 영어로 적어주세요. [ENTER DATE IN KOREAN]까지 온라인 신청서를 제출하거나 소인이 찍힌 신청서를 보내야 합니다.

Kreyòl Ayisyen
 Apilke sou entènèt sou sitwèb nyc.gov/housingconnect. Pou resevwa yon tradiksyon anons sa a nan lang Kreyòl Ayisyen ak aplikasyon an sou papye, voye anvètè ki gen adrès pou retounen li nan: HELP Crotona Park LLC, 115 East 13th Street, New York, NY 10003. Nan deyè anvètè la, ekri mo "HATIAN CREOLE" an Anglè. Ou dwe remèt aplikasyon yo sou entènèt oswa ou dwe tennire yo anvan dat [ENTER DATE IN HAITIAN CREOLE].

العربية
 تقدم طلبك عن طريق الإنترنت على الموقع الإلكتروني nyc.gov/housingconnect للحصول على ترجمة باللغة العربية لهذا الإعلان ولنموذج الطلب الورقي. أرسل مغلفاً يحمل اسمك وعنوانك إلى: HELP Crotona Park LLC, 115 East 13th Street, New York, NY 10003. على الجانب الخلفي للمغلف، اكتب باللغة الإنجليزية كلمة "ARABIC". يجب إرسال مغلف الطلبات عن طريق [ENTER DATE IN ARABIC] أو حتمها بتمم البريد بمل [ENTER DATE IN ARABIC].

Governor Andrew Cuomo • Mayor Bill de Blasio • HPD Commissioner Maria Torres-Springer



The background of the entire page is a detailed architectural floor plan of a multi-unit residential building. The drawing is in a light grey line-art style, showing various rooms such as bedrooms, bathrooms, and common areas. The plan is oriented diagonally, with the top-left corner of the page being the top-left of the drawing. In the upper right quadrant, the text 'SAGE NATIONAL LGBTQ+ ELDER HOUSING INITIATIVE' is printed in a bold, black, sans-serif font.

**SAGE NATIONAL LGBTQ+
ELDER HOUSING INITIATIVE**

SAGE'S HOUSING DEVELOPMENT TOOLKIT

**Section 4: Data as
Evidence: When Met with
Resistance, Use Data**

4

Section 4: Data as Evidence: When Met with Resistance, Be Prepared

Data compels people with power to listen and invest, and it is necessary to support your case. Here are a few facts to do so.

- While the lack of a national probability study makes it impossible to know the size of the LGBTQ+ older adult population with precision, it is estimated that by 2030 there will be approximately 7 million LGBTQ+ people in the U.S. who are 50 and older.
- LGBTQ+ older people are more likely to live in poverty than their non-LGBTQ+ peers are and experience higher rates of physical and mental health disparities.
- 44% of LGBTQ+ older people are very or extremely concerned that they will have to work well beyond retirement age just to have enough money to live, as compared to 26% of non-LGBTQ+ older people¹
- 40% of LGBTQ+ older adults say their healthcare providers do not know their sexual orientation²
- 48% of same-sex older adults say they have experienced housing discrimination³
- 1 in 4 transgender older adults reports discrimination when seeking housing⁴

TALKING POINTS: AFFINITY SPACES

- We aim to integrate LGBTQ+ people into every realm of society, and separation is not ideal—but building LGBTQ-affirming housing is still needed in our current social environment to protect people against harm.
- Affinity space and LGBTQ-affirming housing is not "special treatment," but an act of developing housing with equity at the forefront.

HELPFUL TIP

Know Your Audience

Remember the power map (Module #2 Appendix) and be strategic with your energy. Some people can be brought in, and some people will not.

- Affordable LGBTQ-affirming elder housing is an important way to create safety and affirming community for elders who experience intensive isolation and the threat of discrimination in spaces that are not LGBTQ-affirming.
- Affinity spaces help people connect to one another with shared lived experiences, breaking isolation and improving long-term health outcomes and cognition.

TALKING POINTS: DISCRIMINATION'S IMPACT

- Financial and health disparities make it doubly important that LGBTQ+ older people have access to safe and affordable housing.
- LGBTQ+ older people need space to build relationships in ways they tend not to in mainstream society, rooted in fears of coming out and the risk that has posed to them throughout most of their lives.
- SAGE trains the aging and housing sectors on these specific needs and barriers, but there is still an unmet need for safe, affordable housing that protects people against discrimination.

¹ "Out and Visible: The Experiences and Attitudes of Lesbian, Gay, Bisexual and Transgender Older Adults, Ages 45-75." Robert Espinoza.

² "Health Disparities Among Lesbian, Gay, and Bisexual Older Adults: Results From a Population-Based Study." Karen I. Fredriksen-Goldsen, PhD, Hyun-Jun

Kim, PhD, Susan E. Barkan, PhD, Anna Muraco, PhD, and Charles P. Hoy-Ellis, MSW

³ Espinoza, 2014.

⁴ Espinoza, 2014.

- LGBTQ+ elders face disproportionate rates of poverty, housing and economic instability, loss of support due to HIV and loss of family of origin, less access to competent caretakers, and even disproportionate rates of cognitive decline, demonstrating trauma's impact on cognitive functioning.⁵
- LGBTQ+ elders have a different reference point towards identity and risk, based in historical discrimination and oppression.
- Vigilance around privacy and "coming out" is specific to generational experiences, presenting different cultural norms than may exist for some LGBTQ+ youth.

TALKING POINTS: COMPOUNDED VULNERABILITY

- Transgender elders still face deep levels of poverty and have been historically barred from "legal" employment avenues, social services, and shelter settings. Transgender elders also face economic marginalization at majorly disproportionate rates.

APPENDIX TOOL

Supplemental Data Works Cited and Research

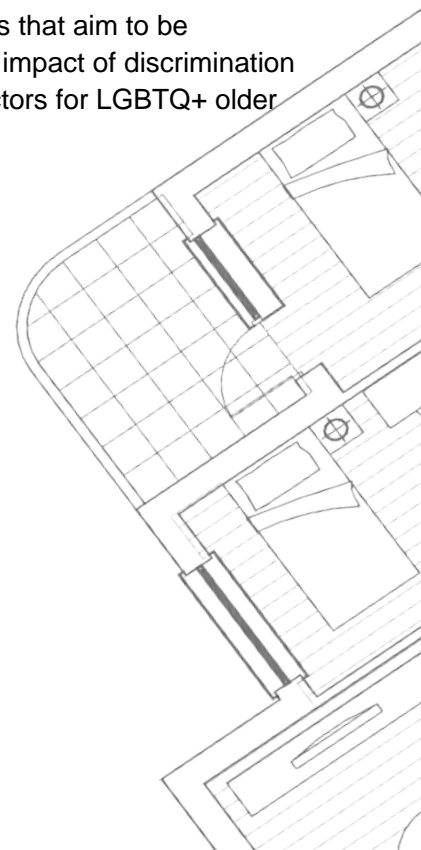
Historical invisibility and discrimination mean that data collection on LGBTQ+ elders is still lacking. Here is some supplemental data to help build your case from research leaders in the field.

- Amongst our LGBTQ+ aging communities, specific vulnerability exists for transgender elders and elders of color, again showing the present-day impact of oppression and intersectionality that mandates this type of housing as not just ideal, but a critical necessity for many people aging in our communities.

TALKING POINTS: FRAMING THE NEEDS

- Data helps dispel the myth that LGBTQ+ elders are predominantly white, cisgender, and middle-upper class.
- LGBTQ+ elder invisibility in aging and housing demonstrates an overlooked need and a fast-growing market.
- LGBTQ+ elders came of age at a time when there was great prejudice and violence against LGBTQ+ people, and the medical label of "mental disorder" validated these prejudices.
- Community trauma may make people less willing to be open about their LGBTQ+ identity.
- Politics, laws, policies, and social norms were different 20 years ago, and even more so 50+ years ago—we must remember this when we address specific elder needs.
- The perception of risk in medical settings, social services, employment, and other public arenas may be escalated for elders who choose not to come out even in spaces that aim to be affirming, reiterating the impact of discrimination on current protective factors for LGBTQ+ older people.

⁵ "Correlates of Subjective Cognitive Decline in Lesbian, Gay, Bisexual, and Transgender Older Adults." Jason D. Flatt, Julene K. Johnson, Stephen E. Karpiak, Liz Seidel, Britta Larson, Mark Brennan-Ing.



APPENDIX TOOL:

Supplemental Data Literature Review

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The background of the entire page is a detailed architectural floor plan of a building. It shows various rooms, corridors, and furniture like tables and chairs. The lines are thin and grey, creating a technical drawing aesthetic. In the top right corner, the text 'SAGE NATIONAL LGBTQ+ ELDER HOUSING INITIATIVE' is written in a bold, black, sans-serif font.

**SAGE NATIONAL LGBTQ+
ELDER HOUSING INITIATIVE**

SAGE'S HOUSING DEVELOPMENT TOOLKIT

**Section 5: Vetting Partners:
Mission Alignment in
Choosing Your Developer,
Property Management, and
Service Provision Teams**

5

Section 5: Vetting Partners: Mission Alignment in Choosing Teams

Know your mission and know the mission of every partner involved.

Trust the experts:

- Experienced nonprofit developers serve as a resource
- Talk to people who have worked with potential partners for feedback on the partnership
- Consult with experts who can lead on new initiatives if this is new terrain—Should you hire a Project Lead?
- Make sure the mission of the project is in line with what the needs of the community and the local government expectations
- *Example:* Crotona Pride House developer HELP USA
 - Know what problems can present in these types of buildings, such as work quality, architect portfolios, and subcontractor relationships

Choose partners based on the mission, skills, and portfolios

- Look at the track record of developer and of property manager
 - Have they worked with low-income people and/or are they committed to the mission?
 - Have they worked with people of color? LGBTQ+ people? Older adults?
- Work with a developer and property manager who understand and are in line with the mission, understand the community you are working with, and are committed to stabilizing low-income tenants in their housing
- Who are your partners' contractors and subcontractors? What are their track records?
- Talk with people who have worked with each entity involved, especially if they have worked with low-income people and are committed to working with low-income people

HELPFUL TIP

Building a Senior Center from the Ground Up

Most senior centers are in church basements or established nonprofits. Building from the ground up is a process in itself!

Don't be afraid to consult experts in aging on what LGBTQ+ elders need in both home and shared community spaces.

- Choose an architect who is familiar with aging in place and the needs of senior centers; remember the importance of intentional design!

REMEMBER: The work of your partners will directly impact your agency's reputation and the lives of tenants—your partnerships result in the faith people will have in you.

Know every community and business partner's mission

- Mission and values in both theory and practice must guide the developer and property management vetting
- As linkage agreements and other service provision are established, ensure service providers are in line with mission, demonstrated in their work
- For-profit vs nonprofit housing developers
 - What is the difference?
 - Develop pros/cons of each model

REMEMBER: Center cultural competency in each partnership, and train every partner on the specific needs of LGBTQ+ aging communities in housing and service provision.

Role definition: What is expected from each party?

- Clearly articulate the social service provider role in the development, lease-up, and ongoing work once the building is running
- Ensure all partnerships maintain communication throughout the entirety of the development process, as well as the lease-up, residence upkeep, and ongoing residential functioning
- Establish weekly or biweekly team meetings between social service team, property management, and security team to ensure clear and transparent communications and ongoing role definition
- Map out roles of service provision team, property management team, developer, and any other ongoing partners who will work with tenants
 - Rent collection and other logistical duties require clear protocols and cultural competency
 - Tenants will often go to the super or security guard for something more relevant to clinical staff—it is ok to redirect with a human-centered approach
 - Role expectations and support for service provision staff are essential in guiding the nonprofit's role in general functioning and community wellness of the building
 - Ensure your direct service staff have capacity and support infrastructure set in place before the lease-up process begins—including equitable salaries and reasonable workloads

HELPFUL TIP

To build trust and connection in the neighborhood, identify your community allies and who CAN be allies based on respective missions.

Build relationships with these groups.

- Establish residential policies and procedures before the lease-up process begins, through the lens of the shared mission
 - Incident reports
 - Eviction protocols
 - Contingency and disaster planning
 - Visitor policies
 - Social service safety planning (Cognitive decline, DV, interpersonal conflict, police presence, etc.)
- Ensure your social service team has appropriate support, guidance, and role definition
 - Clinical staff? Tenant advocates?
 - Caseload size and parameters of work?
 - Will service provision staff serve the entire Senior Center, or only building residents?

Partners' impact on residents and nonprofit staff—think about the following:

- The huge impact on the community both in the residence and externally
- Transparent financial processes (such as responsibility for security deposits)
- Sustainability of the work, directly impacted by partnership culture
- Staff sustainability, support, burnout; Vicarious trauma in this setting requires established support and care

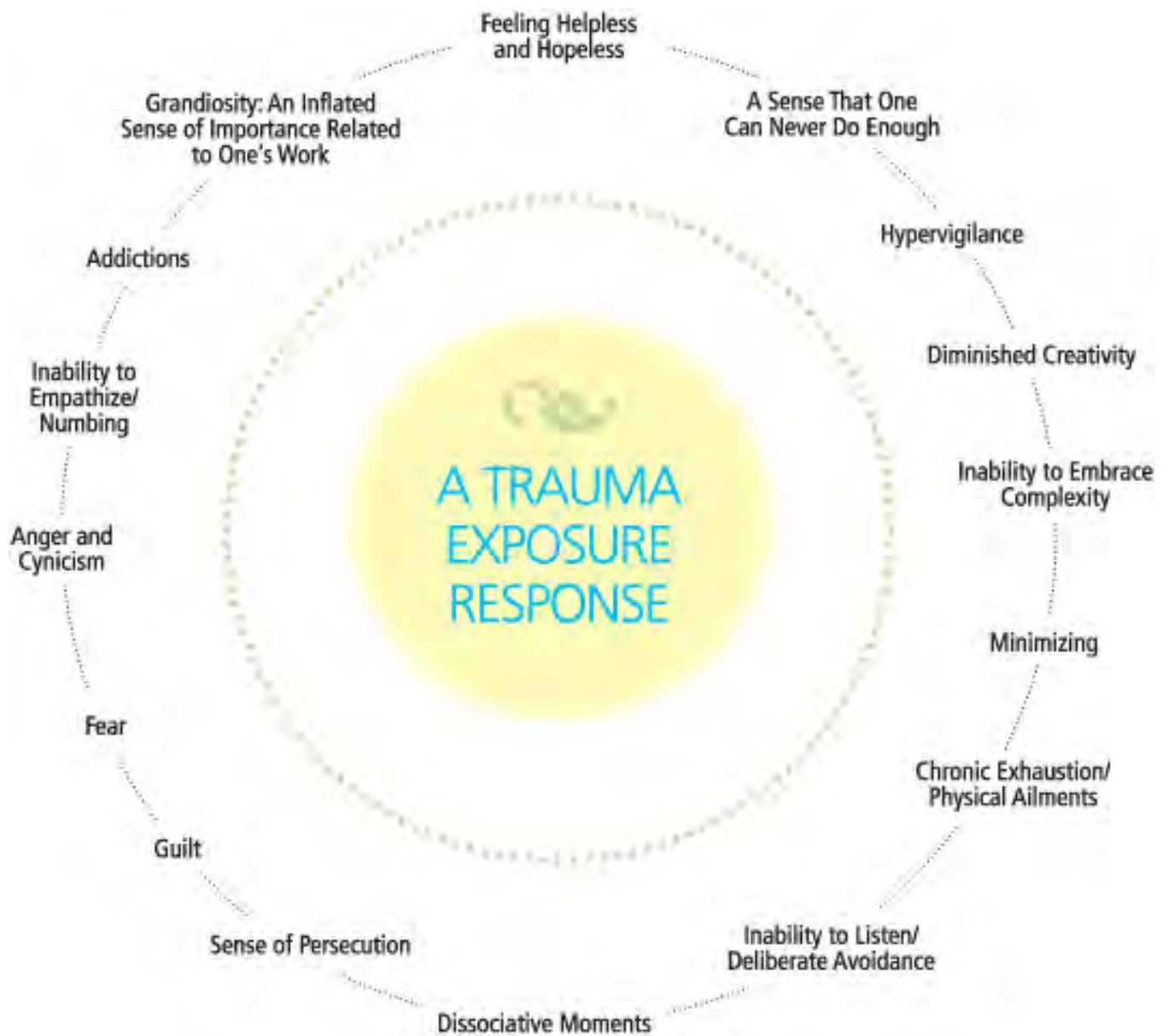
APPENDIX TOOL

Trauma Response Chart One-Pager

Working in housing can present challenges. Understanding trauma and the impact on staff and tenants will help center mission alignment in policies, procedures, and partnerships. It will help develop a trauma-informed environment across partnerships and cultivate a supportive work environment for direct service and property management staff.

APPENDIX TOOL: Vicarious Trauma One-Pager

Copyright: Laura van Dernoot Lipsky. Trauma Stewardship: An Everyday Guide to Caring for Self While Caring for Others. 2007.



The background of the entire page is a detailed architectural floor plan of a residential building. It shows various rooms including a living area with a large circular table and chairs, a dining area with a rectangular table and chairs, a kitchen with a sink and stove, and a bedroom with a bed. The drawing is a line-art style in a light gray color.

**SAGE NATIONAL LGBTQ+
ELDER HOUSING INITIATIVE**

SAGE'S HOUSING DEVELOPMENT TOOLKIT

**Section 6: Defining Roles
and Expectations**

6

Section 6: Defining Roles and Expectations

Clear expectations of ALL partners are critical for your reputation and for the wellness of the communities you are serving. Partners should be in line with the mission, community, and commitment to stabilizing LGBTQ+ elders in their housing. Mission commitment is bolstered by evidence and practice.

- Choose your partners wisely—namely, the developer, property manager, and service provider
- Partners influence your agency’s reputation, public confidence, and the lives of tenants
- Make sure to review portfolios, websites and any public-facing news of potential partners

Ensure you discuss funding and costs with the developer exhaustively, including the funding availability and need to build a senior center or community space in the residence.

PARTNERSHIP CONSIDERATIONS

- Have they worked with low-income people?
- Are they committed to the mission?
- Have they worked with people of color, LGBTQ+ people, or older adults?
- What is the track record of contractors and subcontractors?
- Is the architect familiar with aging in place or senior centers?

STAFFING

Know how much staffing you’ll need internally, and clearly define all staff roles. Consider:

- Which staff will be involved in this project?
- What expertise is needed along the way?
- Who will be working with the developer, construction, finances, and community-engagement teams? What about other important roles?

HELPFUL TIP

Capacity: Don’t bite off more than you can chew!

Contain the work based on the organization and community capacity.

- Where do we need further expertise, and who can we engage for external support?

TIMELINE

Map out all steps of the process and partner roles:

- For each development stage, outline the work and roles chronologically
- Include the role of elected officials, government entities, local rules and regulations, and what might shift along the way
- Allow some wiggle room for shifts in approval process, communications, or other changes

ROLE DEFINITION

Know how much ownership each partner will have in the development, lease-up, and daily building activity:

- Clearly define capacity and roles of the service provision team, property management team, developer, and any other ongoing partners who will be working with tenants, rent collection, or other ongoing duties
- Set up routine check-in meetings with all parties involved
- Create and sign MOUs to make sure commitments and expectations are met

Example: If designing ADA compliant apartments, ensure ADA compliance is at highest quality and name who is responsible for completion?

HELPFUL TIP

Train all stakeholders in cultural competency

Cultural competence is a set of behaviors, attitudes, and policies fostered in a system or agency that address the various needs of community members, staff, tenants, or other stakeholders to equitably and effectively work together across diverse identities and cultures.

(For more information on cultural competency, see toolkit module #8).

ANCHOR AGENCY: Identifying a social service partner

An anchor organization is usually a community-based organization or nonprofit providing services, programming, or aging care for LGBTQ+ elders.

- Can help find a site or prime location through political leverage, community relationships, and longevity in an area
- Working with a social service provider from the beginning creates cohesion and efficiency
- An anchor organization can help access resources and financing from local and state agencies
- An advocate group can help move the project along, gain political buy-in, and build acceptance

REMEMBER

This is a long-term relationship! Establishing cohesion, trust, and efficiency amongst partners helps cultivate the same for the tenants of the building.

ESTABLISH MISSION-DRIVEN POLICIES AND PROCEDURES

Expectations and tenant support must be defined from the beginning of the journey. Develop clearly articulated and available processes before lease-up begins for the following:

- Incident reports
- Eviction protocols or prevention funding
- Financial processes like security deposits, rent arrears, or moving cost support
- Contingency and disaster planning
- Community agreements and behavioral expectations
- Visitor policies

Social service safety planning, addressing issues such as cognitive decline, domestic violence, interpersonal conflict, police presence in the building, or other safety concerns

REMEMBER: CHOOSE PARTNERS WISELY

This is a long-term relationship! You will be working with your partners for the next few decades. Considering these factors, keep the following in mind:

- Know your mission, and know the mission of every partner involved
- Experienced nonprofit housing developers can serve as a resource, so don't hesitate to speak with them
- Train all partners in cultural competency
- In new terrain, don't be afraid to consult with experts—this might involve hiring an experienced Project Lead
- Make sure the project is in line with what the local or municipal government expects and the communities you are aiming to reach
- The end goal is to support, affirm, and cultivate healthy living and aging environments for the residents of the development

The background of the entire page is a detailed architectural floor plan of a residential building. It shows various rooms, including a kitchen with a sink and stove, a dining area with a table and chairs, a living area with a sofa and coffee table, and several bedrooms with beds. There are also smaller details like a plant, a clock, and a window with curtains. The lines are thin and grey, creating a technical drawing aesthetic.

**SAGE NATIONAL LGBTQ+
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SAGE'S HOUSING DEVELOPMENT TOOLKIT

**Section 7: Building Design,
Physical Infrastructure, and
Safety**

7

Section 7: Building Design, Physical Infrastructure, and Safety

How can physical space create safety?

- Affirming space through visible cues
- Affirming and appropriate intake forms, meeting both identify and holistic health needs
- Visible representation
 - Art representing the diversity of identities residing in the building
 - Community agreements, outlining behavioral expectations and share values of the residence
 - Affirming signage, such as rainbow flags, transgender flags, or flags representing other community identities

Design and architectural considerations for LGBTQ-specific aging needs:

- Choose an architect familiar with trauma-informed design
- Consider warm colors, soft lighting, plants, and other factors that make hallways, common spaces, and apartments feel less “institutional”
- Consider fine motor, physical, and cognitive health needs in long-term design planning
- Geographic location
 - Grocery stores and essential staples
 - Transportation
 - Walkability, mobility, and walker access
- Community environment
 - Senior Center or community room size
 - Office space
 - Number of apartment units

HELPFUL TIP

Always consider the lobby design

Fielding calls and guests, waiting for transportation, neighbor interactions, mailroom infrastructure, and building security can all happen in the lobby. Consider the range of purpose for this space!

Identify potential safety concerns and respective safety plans that can occur in a residence:

- Domestic Violence or Elder Abuse
- Racism
- Hate Violence
- Police Violence

Neighborhood connection and police familiarity may help reduce violence, including police violence:

- Connect with local aging, LGBTQ+, and other social or community affinity groups
- Build relationship with the neighborhood officer/policing team
- Engage with members of the police force who engage in trauma-informed neighborhood policing or mental health training with social workers

APPENDIX TOOL

Design Considerations Checklist

Think about the following details in the space, as it can be specific to the specific building populations.

APPENDIX TOOL: Design Considerations Checklist

NATIONAL LGBTQ+ ELDER HOUSING INITIATIVE

Design Consideration Checklist

THINK ABOUT THE FOLLOWING DETAILS IN THE SPACE, AS IT MAY BE UNIQUE TO THIS SPECIFIC POPULATION

- ☼ Geographic location:
 - Access to transportation
 - Near essential staples and fresh food
 - Community environment and relationships
- ☼ Community room or kitchen to cultivate community and address food scarcity, combined with intentional programming and funding for food service provision
- ☼ Size of the Senior Center or the community rooms—How many people should the space fit without it feeling institutional?
- ☼ Traditional multi-desk office spaces vs. smaller, intimate therapy rooms and visually comforting social service settings (through wall color, natural light, etc.)
- ☼ Community size impacts success, and sometimes smaller buildings can cultivate closer community
- ☼ Physical infrastructure must address full accessibility:
 - Emergency alerts in common spaces
 - Terrace garden raised beds for easier access
 - Brick and doorway design preventing falls
 - Plumbing systems must consider aging and health needs
 - Restrooms on the ground floor
 - Restrooms near the laundry facility
 - Lighting: Well-lit for visual accessibility without florescent or institutional lighting, including well-lit hallways
 - Chair size and fabric, considering fabric cleaning, bed bugs, or other wear and tear
 - Space layout, from hallways to outdoor space to unit kitchens and restrooms:
 - High ceilings for art and sharing public information
 - Lobby seating



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DESIGNS 4 DIGNITY: DESIGN JUSTICE CHECKLIST

- ☼ Think about spatial layout: Spaces with clear sightlines and few barriers create a sense of safety and calmness.
- ☼ Create visual interest with detail but not overcrowding. An appropriate quantity of objects, symmetry and regularity in their arrangement alleviates stress and promotes well-being.
- ☼ Avoid deeply hued warm colors that may arouse negative emotions. Cool colors have a calming effect.
- ☼ Furniture should be durable and easy to clean, and its arrangement should enhance safety and promote a positive relationship with staff and other beneficiaries at the organization.
- ☼ Natural light makes rooms appear less crowded, and lower levels of illumination mitigate perceived crowding and the resulting stress and discomfort.
- ☼ Plants perform an important biophilic function by connecting occupants to the natural world, which has been found to reduce stress and pain, and to improve mood.

Citation: Designs 4 Dignity. (2021).
designs4dignity.org

DESIGN CONSIDERATION CHECKLIST CONTINUED

- ☼ Apartment unit accessibility and safety, with consideration for aging in place for a range of cognitive abilities:
 - Life alert or emergency pulls
 - Shower bars or seats
 - Kitchen sink ledges, preventing water spillage which may cause fall risks
 - Apartment size—downsizing can be traumatizing, and two-bedrooms are important for visitors, family, or other people of support
- ☼ Community engagement and isolation considerations:
 - Warming kitchen vs. full kitchen for units and community rooms
 - Front desk location and proximity to community space, understanding a community center receptionist might serve a different role than a front-desk or security greeter, considering fielding calls, greeting visitors, and maintaining building security:
 - For example, can a tenant have a visitor enter/get signed in privately if they are having an overnight guest if they don't want rumors to start up because they had to walk right past the community room?

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