



# ROADMAP TO LIVABILITY

Strategies and solutions that make a community great for people of all ages



## Housing Workbook

Book 3 in the **AARP** *Roadmap to Livability Collection*

A Publication of



Available online at [AARP.org/LivabilityRoadmap](https://www.aarp.org/LivabilityRoadmap)

# **AARP** *Roadmap to Livability Collection*

Strategies and solutions that make a community great for people of all ages

Book 1 **AARP** *Roadmap to Livability*

Book 2 **AARP** *Roadmap to Livability: Community Listening Session Tool Kit*

Book 3 **AARP** *Roadmap to Livability: Housing Workbook*

Book 4 **AARP** *Roadmap to Livability: Transportation Workbook*

Book 5 **AARP** *Roadmap to Livability: Health Services and Community Supports Workbook*

Book 6 **AARP** *Roadmap to Livability: Economic Development Workbook*

A publication of  
**AARP** Livable Communities  
Community, State and National Affairs  
[AARP.org/Livable](https://www.aarp.org/Livable)

Available for download at [AARP.org/LivabilityRoadmap](https://www.aarp.org/LivabilityRoadmap)

AARP is a nonprofit, nonpartisan organization with a membership of more than 37 million that helps people turn their goals and dreams into real possibilities, strengthens communities and fights for the issues that matter most to families, such as health care, employment security and retirement planning. We advocate for consumers in the marketplace by selecting products and services of high quality and value to carry the AARP name as well as help our members obtain discounts on a wide range of products, travel, and services.

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# Housing Workbook

Book 3 in the **AARP** Roadmap to Livability Collection

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***“The physical features of a residence can be critical to a person’s ability to age in place. Unfortunately, much of the nation’s current housing stock may prove inappropriate as the population ages.... Accessibility features permit people to age in place rather than being forced to move to more expensive assisted living facilities or other institutional settings.” — AARP Policy Book***

***"A Livable Community is safe and secure, has affordable and appropriate housing and transportation options, and offers supportive community features and services. Once in place, those resources enhance personal independence, allow residents to age in place, and foster their engagement in the community's civic, economic and social life."***

— **AARP Policy Book**

This **Housing Workbook** is a companion publication in the *AARP Roadmap to Livability Collection*. The workbook provides tools and worksheets that can help engage a community in the development and implementation of an action plan for becoming a better place for people of all ages to live, work and play.

Every community is different and each has its own goals for housing. This AARP workbook can be used to guide a wide array of efforts to improve housing, including efforts that seek to:

- Improve accessibility and accommodations for people of all ages and abilities
- Address the issues of affordability and choice
- Advocate for property tax relief
- Advise a municipality about changes in building codes that can benefit the community

The people working to improve housing in the community will decide what types of projects will make the community more livable. Our goal is to provide a framework that can be used to assess, plan, evaluate and implement the housing efforts that are right for your community.

The takeaway from this workbook will be a clear action plan that's crafted from:

- A list of the community leaders who make or influence decisions about housing, so the team can target and work with them
- A strategy for developing core allies into a team and partnering with people and organizations across the community
- An assessment to identify existing strengths in housing and to ask community members about the needs and improvements they identify as priorities
- A description of how to prioritize needed improvements based on resident input, feasibility and community leadership
- A path for implementing the changes identified in the assessment
- An assignment chart for implementing action items with the core team and partners
- A list of metrics for measuring the progress of the action plan
- A communications worksheet that maps how to engage and inform the community about the needed changes, and the progress the team will be making

### **Book 3's Collection Connection**

The ***AARP Roadmap to Livability: Housing Workbook*** is the third title in the six-part ***AARP Roadmap to Livability Collection***.

The steps detailed in this guide, created as a resource for individuals involved in housing-related livability efforts, correspond with those in Book 1, which provides a broad overview of strategies and solutions that can make a community a great place for people of all ages.

## ➤ A Bit of Background

The accessibility, affordability and variety of housing options support the widely held desire of middle-age and older adults to remain in their communities as they age. Age- and ability-friendly housing options allow residents to stay in their own town even when a change in health or physical fitness means that a person needs some help to live safely and with as much independence as possible. Accessibility, housing affordability and choice affect many communities.

### Housing Accessibility

Housing accessibility is determined by whether housing can accommodate people of all ages and abilities; it's crucial to the majority of Americans who say they would like to remain in their home.

The expected growth of the older population between 2010 and 2050 (from 40 million and 13 percent of the population to 89 million and 20 percent of the population) means that housing for older people will be in demand. Policymakers must act now to ensure an adequate supply of accessible housing.

#### ■ Policies That Impact New Construction

Accessible building standards allow older Americans to remain in their homes longer, instead of either spending money on retrofits or relocating to other housing. Although the Americans with Disabilities Act (ADA) requires any building constructed after 1992 to be "readily accessible to and usable by" those with disabilities, it does not apply to private housing, unless that housing was funded through state and local government housing programs. Statutes in at least three states — Minnesota, Pennsylvania and Texas — encourage developers of affordable housing to install features in single-family homes to make it easier for older adults to age in place.

#### ■ Home Modifications

For people living in homes they own or are renting, basic home modifications can make a home safer and more enjoyable. Some modifications are simple and don't carry a significant cost. However, more complicated modifications might require the help of a professional. One way to make a community more livable might be to start a volunteer-run program that provides low-income residents with free or low-cost home repair and modification services.

#### ■ Home Repair and Maintenance

Maintaining a home can be physically and financially challenging. Climbing a ladder to clean gutters, changing a battery on a smoke alarm, or tacking down a new rug can be hard for people who have trouble getting around. Affording basic home repair can be a challenge for low-income residents. Some livable communities have started low-cost or no-cost programs to help people with a low income or who are living with a disability to maintain their homes.

### What's Universal Design?

As characterized by the Center for Universal Design, the intent of the universal design or UD concept is to "simplify life for everyone by making products, communications, and the built environment more usable by as many people as possible." Within a residential setting, examples of universal design features include a no-step entrance, multiple countertop heights, wide doorways, lever faucets and a curbless shower. Rather than being geared solely to older adults and people with disabilities, universal design features are intended to have general utility and market appeal.



## Housing Affordability and Choice

Housing costs determine whether individuals and families can live in a neighborhood without sacrificing other basic necessities, such as food and health care. Low-income individuals and people living on fixed incomes acutely feel the effects of the nation's affordable housing crisis.

Livable communities that include walkable downtowns with flourishing local businesses and entertainment options, attractive and welcoming parks, access to quality health care, and affordable transportation options are attractive to people of all ages, abilities and income levels.

Communities with a variety of housing options attract households of diverse sizes. Such places also enable people to remain in the community as they age, staying in their home or moving to housing in line with their changing needs. The need for assisted living or residential skilled nursing care should not preclude someone from living in the community of his or her choice.

Ideally, communities have high-quality options for people at all income levels.

### Reading List

See page 40 to find online articles, reports and resources, including:

- ***Aging in Place: A State Survey of Livability Policies and Practices***, a research report by the National Conference of State Legislatures and AARP Public Policy Institute
- ***Expanding Implementation of Universal Design and Visitability Features in the Housing Stock***, AARP Public Policy Institute
- ***A-Z Archives: Housing***, [AARP.org/Livable](https://www.aarp.org/Livable)

### A Note About Money Matters

The focus of the *AARP Roadmap to Livability Collection* is on creating a strong plan that will guide the implementation of a livability initiative. Funding is, of course, an absolute necessity for implementation, and you can find some information about funding on page 20 of Book 1. However, the topic of financing change — through fund-raising efforts, grant proposals, or receiving financing from a municipality — is not covered comprehensively in this series.

***Let's Get Started!***

## ➤ Put Together a Team

Identify strong leaders and champions who believe in the work and will commit to it. These people are the “core team.”

### Worksheet: The Starting Lineup

**Leaders:** Who is going to make sure this initiative moves forward and will follow it through to completion?

Name	Title/Community Affiliation	Contact Information

**Champions:** Who has the authority to make decisions about this initiative (elected/appointed officials/ decision-makers)? Who has connections with elected and appointed officials or decision-makers and is well respected (by elected officials and residents) for ability to make change in the community?

8

Name	Title/Community Affiliation	Contact Information

**Team Members:** Who else is invested in this issue and should be part of this planning team?

Name	Title/Community Affiliation	Contact Information

To add to the core team, complete the worksheet on page 10.



## ■ Selecting Members

If the initiative is multifaceted, it will help to include core team members who have experience or a specific interest in the different aspects of the work. A wide base of support on the team will help in marketing the identified needs and changes, increasing the likelihood of community acceptance.

Under *Title/Community Affiliation*, list the community or regional connections of each core team member. (For instance, if a person serves on the board of directors of the Area Agency on Aging or is an active member of a farmer's guild, this is the place to note it.)

Enter information about each member's interest in the initiative.

## Sample Housing Goals

1. Provide a household chore service to help people with tasks inside their homes and with seasonal maintenance
2. Create a resource guide about local housing services
3. Increase access to home modification and repair programs

*Continued* ➤



*Building a team requires reaching out by social media, telephone, text, email and in person.*

**Worksheet: Expand the Team** (Think about who else can join the effort.)

	<b>Team Members</b>	
	<b>Name</b>	<b>Area of Interest</b>
<b>Core team, including chairs and co-chairs</b>		
<b>Local government representative(s) — such as elected or appointed officials and staff</b>		
<b>Representatives of local nonprofit, religious and service associations</b>		
<b>Representative(s) of local businesses and/or universities</b>		
<b>Residents who represent the demographics and diversity of the local population</b>		

Community Affiliation	Email	Phone

## ➤ Invite Stakeholders

A successful livable communities initiative is based on broad collaboration. A crucial step in developing an initiative is to find, inspire and equip a diverse group of stakeholders to become engaged.

Begin by creating a list of people, groups or organizations that might be interested in or concerned with the outcome of the work. The team probably won't recruit someone in each sector. Use this as a guide to think about how to broaden the base of community support.

Use the *Circles of Involvement Exercise* described on pages 16 and 17 in Book 1, the *Roadmap to Livability*, to brainstorm about people who can be involved in the work.

For ideas about national partners and resources, see Appendix 1.

### Worksheet: **Make a List**

**Beneficiaries** (Who benefits from the work? Who's the customer? On whose behalf is the work being done?)

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**Volunteer Sector** (Examples: faith community, nonprofits, fraternal organizations)

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**Public Sector** (Examples: local or regional government, education, public figures)

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**Private Sector** (Examples: businesses, media, investors, funders)

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**Informal Sector** (Examples: relatives, interest groups and clubs, neighbors)

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**Policy Partners** (Examples: authorizers, management, the board)

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**Resource Partners** (Examples: suppliers, networks)

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**Service Providers and Practitioners** (Examples: local experts, professionals, employees)

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**Others** (Examples: anyone who doesn't fit into the aforementioned categories)

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**The vast majority of people ages 50 and older want to stay in their homes and communities for as long as possible.**

**AARP encourages communities to welcome housing options and develop homes that are accessible to residents and guests of all ages and abilities.**

## Make Assignments

After the team has compiled a list of who is currently involved with the initiative and a list of others who should be involved, note the related groups or organizations in the left-hand column of the **Expand Participation** worksheet (opposite).

Then identify a person to contact in the group or organization, if one is known. If a contact isn't known, reach out through the organization's general information line or website contact page. Think about how each group should, ideally, be involved with the livable community effort.

Assign each group or organization to one or more of the *Circles of Involvement* based on the level of involvement that will advance the work.

For example, the town government could assign a staff person or select a board or council member to attend each core team meeting. A housing subcommittee focused on increasing awareness of accessory dwelling unit (ADU) provisions in the zoning code could be tasked to work with the planning department.

Organizations and groups can be engaged with the livable community initiative in more than one way. On the worksheet, mark the *Core Team*, the *Circle of Engagement*, *Circle of Champions* and *Circle of Information and Awareness* — or the *Circle of Possibility* — as appropriate.

**TIP:** Use a color system to mark cases where the current level of involvement does not match the level of involvement the team thinks would be ideal.

**Worksheet: Expand Participation**

***Circles of Involvement***

	Name of Organization	Name of the Contact Person	Core Team	Circle of Engagement	Circle of Champions	Circle of Information and Awareness	Circle of Possibility
<b>Currently Involved</b>							
<b>Who Should Be Involved</b>							

## ➤ Gather Information and Identify Priorities

Great communities provide housing opportunities for people of all ages, incomes and abilities, allowing everyone to live in a quality neighborhood.

The **AARP Livability Index** (found at [AARP.org/LivabilityIndex](https://www.aarp.org/LivabilityIndex)) evaluates how livable a community is in seven livability categories:

1. Housing
2. Transportation
3. Neighborhood
4. Environment
5. Opportunity
6. Health
7. Engagement

The livability score is based on a diverse set of metrics and considers policies and programs that can enhance community livability over time.

For more about the *Livability Index* and your community's Housing score, see Appendix 2.

**Find the community's baseline  
Housing Score**

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**Housing scores are based on the accessibility, affordability and variety of a community's housing stock.**

**AARP works to promote housing that enables people to live safely, comfortably and independently for as long as possible.**



Now complete the **The Housing Asset Inventory** to identify the community’s housing strengths and the areas where housing options or town policies are needed. The information will help set a baseline, measure the changes that result from the initiative and determine priorities.

<b>Worksheet:</b> <b>The Housing Asset Inventory</b>	<b>Does It Currently Exist?</b>	<b>Is It Adequate?</b>	<b>Is It a Priority Issue?</b>
<b>HOUSING OPTIONS AND POLICIES</b>			
<input type="checkbox"/> Accessible	Yes No	Yes No	Yes No
<input type="checkbox"/> Affordable options for people earning the area median income	Yes No	Yes No	Yes No
<input type="checkbox"/> Availability of subsidized housing	Yes No	Yes No	Yes No
<input type="checkbox"/> Well-constructed	Yes No	Yes No	Yes No
<input type="checkbox"/> Availability of multifamily housing	Yes No	Yes No	Yes No
<input type="checkbox"/> Availability of clean, safe rental options	Yes No	Yes No	Yes No
<input type="checkbox"/> Does building code allow an ADU (an accessory dwelling unit, such as an in-law apartment)?	Yes No	Yes No	Yes No
<b>HOME MAINTENANCE AND SUPPORT SERVICES</b>			
<input type="checkbox"/> Available	Yes No	Yes No	Yes No
<input type="checkbox"/> Affordable	Yes No	Yes No	Yes No
<input type="checkbox"/> Vetted/trusted service providers	Yes No	Yes No	Yes No
<input type="checkbox"/> Volunteer or income-based programs	Yes No	Yes No	Yes No
<input type="checkbox"/> Providers understand older adult needs	Yes No	Yes No	Yes No
<b>LOCATION</b>			
<input type="checkbox"/> Safe areas for housing	Yes No	Yes No	Yes No
<input type="checkbox"/> Proximity to public transit (bus, light rail, etc.)	Yes No	Yes No	Yes No
<input type="checkbox"/> Proximity to services and community	Yes No	Yes No	Yes No
<b>OTHER (Examples: initiatives, funding, opportunities)</b>			
<input type="checkbox"/>	Yes No	Yes No	Yes No
<input type="checkbox"/>	Yes No	Yes No	Yes No

Continued ➤

# Assess the Community

The following methods can be used when conducting a community assessment. Feel free to combine them with other resources. What matters is that at the end of the assessment, the team has gathered the data it needs to start defining goals and creating a strategic plan to move the initiative toward those goals.

## Option 1: Do a Survey

If the livable community team designs a survey, it may want to include one or more of the sample questions listed here.

Different communities need to ask different types of questions. The purpose of each question is to learn what people need and want in order to get the work done and improve housing in the community.

A survey can be distributed electronically, by postal mail or left in public places for people to pick up, fill out and return. Some livability efforts use a combination of methods.

- Distribution by postal mail is the most expensive option but ensures that every person in the community has an equal chance to see and complete the survey.
- The advantage of distributing a survey electronically is that it keeps the costs down and can simplify analysis.
- If the team chooses to use an electronic survey, it should make a paper version available for people who do not have access to or are not comfortable using a computer.

## Sample Survey Questions

When deciding which questions to include, consider how the resulting information will or can be used on behalf of the community.

### 1. Do you own or rent your primary home — or do you have some other type of living arrangement, such as living with a family member or friend?

- Own
- Rent
- Other type of living arrangement

### 2. What type of home is your primary home?

- Single family home
- Mobile home
- Town home or duplex
- Apartment
- Condominium or coop
- Other, please specify: \_\_\_\_\_

### 3. How important is it for you to be able to live independently in your own home as you age?

- Extremely important
- Very important
- Somewhat important
- Not very important
- Not at all important

**4. People sometimes make modifications to where they live so they can remain there as they age. Do you think you will need to make the following types of modifications or improvements to your home to enable you to age in place?**

		Yes	No	Not Sure
a.	Easier access into or within your home by installing a ramp, chairlift or elevator, or wider doorways			
b.	Bathroom modifications such as grab bars, handrails, a higher toilet or non-slip tiles			
c.	Adding a bedroom and/or bathroom on the first floor			
d.	Improving lighting			
e.	Installing a medical emergency response system to notify help if needed			
f.	Other, please specify:			

**5. How important do you think it is to have the following in your community?**

		Extremely Important	Very Important	Somewhat Important	Not Very Important	Not at All Important
a.	Home repair contractors who are trustworthy, do quality work and are affordable	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b.	Well-maintained homes and properties	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c.	A home repair service to assist low-income households and older adults	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d.	Seasonal services, such as lawn work or snow removal for people with mobility challenges	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e.	Affordable housing options — such as active adult communities, assisted living facilities and residences with shared services and spaces — for adults of varying income levels	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f.	Homes that are equipped with aging-friendly features such as a no-step entry, wider doorways, first-floor bedroom and bath, grab bars in bathrooms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
g.	Safe, well-maintained low-income housing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Continued ➤

## 6. Does your community have the following?

		Yes	No	Not Sure
a.	Home repair contractors who are trustworthy, do quality work and are affordable			
b.	Well-maintained homes and properties			
c.	A home repair service to assist low-income households and older adults			
d.	Seasonal services, such as lawn work or snow removal for residents with mobility challenges			
e.	Affordable housing options for adults of varying income levels, such as active adult communities, assisted living facilities and residences with shared services and spaces			
f.	Homes that are equipped with aging-friendly features such as a no-step entry, wider doorways, first-floor bedroom and bath, grab bars in bathrooms			

### Option 2: Hold a Listening Session

Surveys do a great job of revealing how many people share a concern about housing in the community and about housing assets and barriers.

However, surveys don't do a good job of explaining why people answered the survey questions the way they did. Surveys don't provide space for people to talk about an aspect of housing the survey might not have addressed.

For example, a survey we know of didn't include questions about market rate housing (i.e. non-subsidized or discounted housing) for retirees in the city's downtown area, but during focus groups, the livability team learned that such housing was a primary concern.

Community-based organizations and municipalities developed community listening sessions as a tool to inform people about important issues, to build support for a cause, and to discuss potential solutions to problems facing their communities.

Ideally, a listening session will not include more than 25 people, but accommodations can be made for larger groups.

### Option 3: Host a Focus Group

Focus groups bring together a small group of people (typically 8 to 12) to discuss a specific issue — such as access to affordable housing or a policy that promotes high-density development or protects green space.

Focus groups are a good tool for providing clarity to information or ambiguous survey data that has already been gathered from the community.

Another important use of focus groups is to obtain specific community perspectives on themes that emerged from a larger forum, such as a community listening session.





## Worksheet: **Establish Priorities**

Now that the team has completed the assessment, it's time to bring the asset inventory together with the findings from the survey and listening sessions or focus groups to identify the direction for the work.

- **What services, policies and initiatives does the community have in place that are working well?**

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- **What services, policies and initiatives are lacking or not working well?**

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- **What might affect the ability and/or success of addressing potential priorities?**

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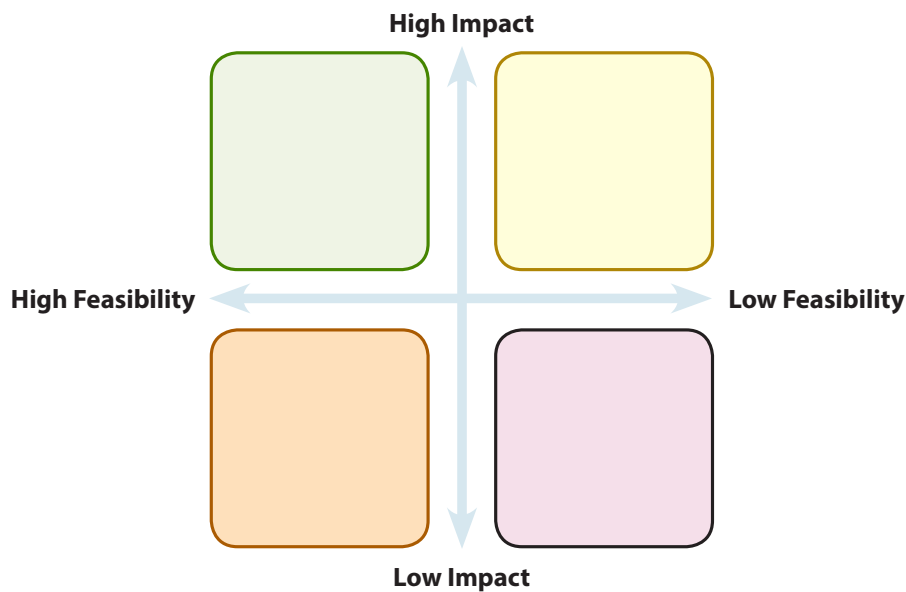
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The **Impact/Feasibility Grid** on page 24 is a useful exercise because no team has enough time to address all of the needs identified by an assessment or to complete all of the activities that could contribute to a specific goal. Use of the matrix will help the team map the priority issues and concentrate its time on the types of high-value activities that will keep the initiative moving forward.

- **High Feasibility/High Impact** activities are “quick wins” that don’t require outside resources and can be accomplished relatively easily. An example is the creation of a guide to help community residents identify their housing options.
- **High Impact/Low Feasibility** activities have the ability to make a significant impact but require funding or cooperation with outside agencies. These can be thought of as “major projects,” such as starting a volunteer service to help older residents make needed modifications to their homes.

- Activities that fit into the **Low Impact/High Feasibility** category are things it would be nice to do but that receive a lower priority than the higher impact, more feasible projects or — the higher impact, low feasibility projects. These can be thought of as “fill-ins” while the team is working on larger projects. An example of a fill-in activity could be developing a display of adaptive equipment that makes everyday life at home and in the community easier for older adults. Meanwhile, the team could be working with the library to create a loan program so people can borrow the equipment to try in their own homes.
- Low priority activities fit into the **Low Feasibility/Low Impact** category. An example would be working to create a Green House-style assisted living center in a small community that already has three assisted living facilities and no wait list. (What’s a Green House? It’s an assisted living residence that looks, feels and operates like a “Home Sweet Home” rather than a hospital.)



*For a larger, usable diagram, see page 24.*

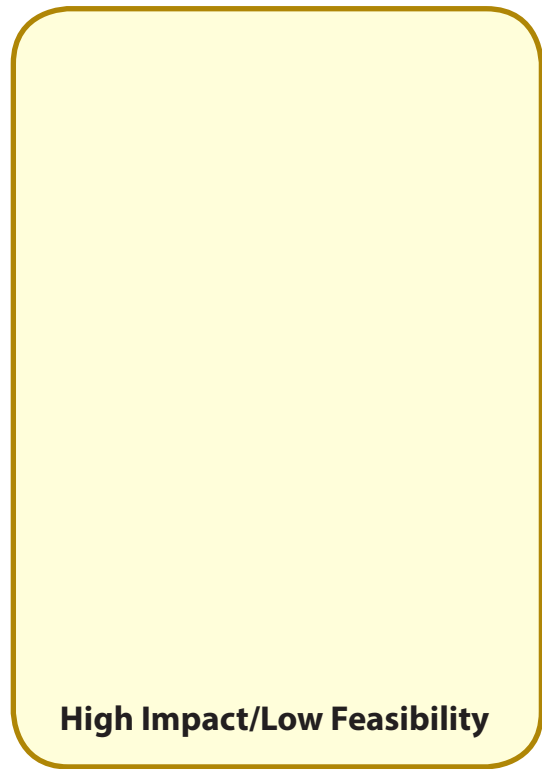
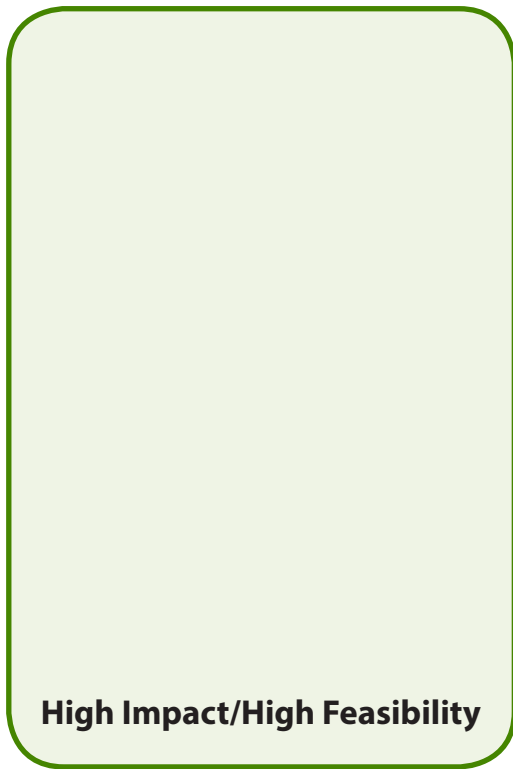
As the team moves through this process, be sure to engage community members in the discussions. This could be an opportunity to conduct listening sessions to share the results of the assessment. Feel free to copy and enlarge the diagram on page 24 and give participants sticky notes so everyone in the room can have input. And don’t feel restricted by the small amount of space for writing responses on the worksheets, especially when conducting a community listening session. Just bring extra paper!

Based on what has been learned and discussed, it's time to prioritize the areas of focus and come to a decision. Identify an issue that has high impact and high feasibility and place it in the green box. By identifying an issue that is relatively easy to address and will have a significant impact on the community, the team will be able to identify a success that community members and other stakeholders will notice. Quick successes increase community engagement.

For the next two priority issues, think about the effect on people’s health and well-being and the local economy. Think about the difficulty of implementation. Don’t include an issue in the red box unless it's critical for the health and well-being of the community. Try to stick with issues the community agrees belong in the yellow or orange boxes.

*Continued* ➤

## Worksheet: **Impact/Feasibility Grid**





**Worksheet: Top 3 Priority Areas**

1. \_\_\_\_\_  
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## ➤ Write the Action Plan’s Mission, Vision and Goals

An action plan includes the mission, vision, values and goals that the core team establishes to make the community more livable. The plan also identifies activities or actions the team will take to meet the goals, and it establishes key indicators to use in evaluating the measure of success.

There are many ways and methods to organize this work besides the one listed below, so use whatever method fits best within the initiative’s framework.

### Worksheet: Develop the Mission, Vision and Values

#### Mission Statement

(a sentence that explains the work’s goals and describes why this group of stakeholders is being convened)

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#### Vision Statement

(an aspirational statement that describes the long-term effects resulting from the work)

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#### Team’s Values

Ask each member of the core team to share what he or she thinks are the most important values for the work being done in the community. Combine the values that all members are comfortable adopting in order to identify three or four that will guide the community’s livability work. See the *Roadmap to Livability*, pages 28 and 29, for more information about creating statements and identifying values.

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## Worksheet: Create SMART Goals and Outcomes

Now set goals that are: **Specific ... Measurable ... Attainable ... Relevant ... Timely**

(In other words, set SMART goals as described on pages 30 and 31 in Book 1, the *Roadmap to Livability*.)

- A **Long-Term Goal** will take one to five years (or more) to accomplish. It may require funding or developing multiple partnerships to complete.

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- A **Medium-Term Goal** can reasonably be accomplished in three months to one year. It might require partnering with another group in order to implement change.

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- A **Short-Term Goal** can reasonably be accomplished in three months.

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An Outcome Statement can be phrased as follows: "If we accomplish \_\_\_\_\_  
then we can expect \_\_\_\_\_ and  
\_\_\_\_\_ to occur."

### Examples of Housing Goals

1. Create supports to assist older people with the maintenance of their homes
2. Maximize awareness and provide training to increase the amount of housing that is accessible, affordable and safe
3. Increase and promote community awareness about housing options, home modification opportunities and the benefits of universal design
4. Advocate for the creation of a property tax credit for older residents with limited incomes
5. Promote awareness about municipal programs and services that can help older people remain in the community rather than move away due to age-related difficulties
6. Develop and expand the use of accessory dwelling units — such as in-law suites, backyard bungalows, garage or basement apartments — to provide affordable housing options
7. Create tools and a marketing plan to attract developers of moderate-income housing options

## ➤ Develop the Action Plan’s Strategies and Tactics

A strategy is a comprehensive action plan that’s implemented to achieve the goals of the initiative. Strategies explain what the team is trying to accomplish. Strategies are a guide to a set of tactics for accomplishing a goal. Think of a strategy as the *What* and the tactics as the *How* and *By Whom*. The following chart compares strategies and tactics.

STRATEGY	TACTICS
<p><b>The overall action plan for addressing a specific goal</b></p>	<p><b>The <i>How</i> and <i>By Whom</i> statements that explain how the strategy will be implemented</b></p>
<p><b>Example:</b></p> <p>Address the need for more information about housing resources (<i>The Goal</i>) by partnering with the municipal government to increase awareness about the affordable, accessible, appropriate housing options available in the community and of zoning to permit the development of private options — such as the addition of accessory dwelling units or implementing house sharing in a single-family home (<i>The Strategy</i>).</p>	<p><b>Examples:</b></p> <ol style="list-style-type: none"> <li>1. Dani (<i>Who</i>) will attend the regional service provider meeting (<i>How</i>) to introduce the plan.</li> <li>2. Maria (<i>Who</i>) will meet with the Our Town Housing Coalition and the Area Agency on Aging (<i>Who</i>) to learn about housing options and programs (<i>How</i>).</li> <li>3. Robert will meet with the city planning department to learn about the zoning and building codes that may affect the ability of residents to develop cohousing or “in-law” apartments.</li> <li>4. Fatima (<i>Who</i>) will meet with the website coordinator (<i>Who</i>) to learn if housing information and a resource list can be added to the town website (<i>How</i>).</li> </ol>
<p><b>Example:</b></p> <p>Address social isolation of older residents (<i>The Goal</i>) by providing technical support for a fraternal organization that wants to start a volunteer home maintenance service that will complete simple repairs in the homes of older adults to increase safety, accessibility and comfort (<i>The Strategy</i>).</p>	<p><b>Examples:</b></p> <ol style="list-style-type: none"> <li>1. William (<i>Who</i>) will arrange a meeting between the livable community initiative and the fraternal organization to form a joint working group (<i>How</i>).</li> <li>2. Olivia (<i>Who</i>) will contact Neighbor City (<i>Who</i>) to learn how it implemented its volunteer home repair program (<i>How</i>).</li> <li>3. Jon (<i>Who</i>) will contact the state AARP office (<i>Who</i>) to see if it has information about best practices (<i>How</i>).</li> </ol>

## Worksheet: **Adapt (as Needed) for Action**

There is usually more than one path to a desired outcome. One way to gather information about the different routes to a goal is by researching how other communities have implemented a plan to meet a similar goal. The following worksheet can help determine whether a program or service that was implemented elsewhere can work in the team's community. Questions the core team should ask about an initiative before implementing it:

**1. Is a program similar to this one already at work in the team's community?**

*(if yes, consider partnering with that program to enhance the work it is doing)*

No       Yes, \_\_\_\_\_

**2. Was there a previous program similar to the one the core team is planning?**

*(if yes, why did it stop?)*

No       Yes, \_\_\_\_\_

**3. What side effects (good and bad) might accompany the implementation of the initiative?**

**4. Have other municipalities implemented a similar approach?**

No       Yes

(If yes, list the name of the municipality and the contact information of someone the team can speak with about the implementation experience)

Municipality: \_\_\_\_\_ Contact: \_\_\_\_\_

**5. After speaking to a representative from a community that has implemented the idea, list and consider how that community is similar and different (in size, resources, geographical area, etc.) from the one the team represents.** \_\_\_\_\_

**6. How will the differences of the team's community affect the implementation of the initiative?**

\_\_\_\_\_

**7. What "lessons learned" did the other community share when talking about its experience?**

\_\_\_\_\_

**8. To avoid some of the pitfalls experienced by the other community, how will the core team plan for those challenges (and successes, too)?**

\_\_\_\_\_

*Continued* ➤

## Worksheet: **Put It All Together**

<b><i>The initiative ...</i></b>	<b>Priority</b>			<b><i>Questions/Comments</i></b>
	<b><i>High</i></b>	<b><i>Medium</i></b>	<b><i>Low</i></b>	
<b>Addresses the needs identified in the livable community assessment</b>				
<b>Lines up with the livable community project mission</b>				
<b>Is practical for the community</b>				
<b>Is likely to be effective</b>				
<b>Will be cost-effective</b>				
<b>Will be easy to put into practice</b>				
<b>Requires hiring an outside consultant</b>				
<b>Requires change to a law or policy</b>				
<b>Needs money to implement</b>				
<b>Will be accepted by those the core team hopes will use it</b>				
<b>Will be embraced by the community</b>				

## Housekeeping Tips

- No matter how well the core team has planned, nearly every program that is implemented needs further adjustments to meet the needs of a particular community. One way to determine when changes are needed is to include a regular evaluation of the work.
- As the core team moves into the implementation phase, complete two worksheets: **The Action Plan** (page 36) and **The Communications and Marketing Plan** (page 38).
- A livable community initiative is dependent on good will from community members, the municipal government and other community and regional partners. It's important that the target population knows *how* the work is making the community more livable. If people don't know what's being offered, they won't be able to enjoy the new services, programs or improvements.
- The initiative's goals, as well as its successes when goals are met, should be shared with the community partners, the municipal government, the community at large and funders. When involved with community development work, it's good to brag!
- It's also important to celebrate the success of any partnerships. The core team couldn't have achieved what it did without its partners, so be sure to express gratitude to them privately and publicly when appropriate.
- Community partners will enjoy receiving media accolades for their involvement, and coverage increases awareness about the overall livable community work. Media coverage can help attract new volunteers and new partners — and ensure that the existing partners sign on again.



## ➤ Determine the Evaluation Process

In the final column of The Action Plan worksheet that starts on page 36 of this guide, there's space to identify metrics for evaluation.

If you need help establishing effective metrics, refer to page 36 of Book 1, the *Roadmap to Livability*.

### Or consider the following ideas:

- One way to measure the overall success of a housing initiative is to track the number of residents who say they plan to remain in the community as they age.
- If the initiative is working on ways to enable older adults to safely reside in their own homes, it could be useful to learn how many people are enrolling in home safety and modification programs.
- In fact, the livability team can work with the AARP office in its state to conduct an *AARP HomeFit* workshop. As part of the evaluation the team can record, as an "output," the number of people who participate in the workshop. To measure outcomes, the team can later do a telephone survey to find out how many people have made changes in their home and how they feel about the changes made.
- If the initiative wants to help residents find contractors who can do home modification work, the team can develop a list of vetted building and remodeling contractors who have participated in home modification training or have completed the Certified Aging-in-Place Specialist (CAPS) program offered by the National Association of Home Builders. To measure success, the team can count the number of printed lists it distributes or count the hits it receives online.
- If the initiative is working to encourage the development of age- and ability-friendly housing, the team can count the number of new housing units that are age-friendly or designated for people, say, 65-plus.

## Evaluation Methods

There are different ways to measure the overall success of each goal and the impact the initiative has had on the community.

### Common evaluation tools include:

- Satisfaction surveys
- Reports
- Focus groups
- Interviews with participants and community members
- Community indicators (such as the number of income-eligible people who are using the Supplemental Nutrition Assistance Program or SNAP, formerly known as food stamps)
- Program and public data (such as the number of people who participated in a program)





# Evaluation Essentials

- INPUTS are the resources that had to be present for the livability initiative to be implemented.**

*For example, for a program that matches teens with older adults who want to learn more about technology, the inputs are:*

- 1. The place where equipment can be accessed*
- 2. Computers and other devices that older adults want to learn more about*
- 3. Students and older adults willing to participate in the program*

- OUTPUTS tell what was created — what the team is doing and whom the work reaches. Outputs are the direct result of the input, the activity, program or service that was implemented.**

*An example of an output for a home modification initiative may be the number of homes that received services or the average number or type of modifications made.*

- OUTCOMES report the changes that have occurred because of the livability initiative.**

*For example, outcomes of a home modification initiative could be:*

- 1. Knowledge by residents about the things they can do to prevent falls in their home*
- 2. The decision to make additional home modifications that were not included in the original program*
- 3. The reduction in the number of hospital visits due to falls*

## NOTES:

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## Spread the Word

Now that the livability team has moved to the implementation stage, it's important to get the word out. Effective communication begins by raising awareness about the Action Plan. One of the first steps in a marketing campaign is to share the action plan with *everyone*, whether someone has already been part of the work or not, including but not limited to:

- The community's leaders and decision-makers
- Local social service and health care providers
- Local business owners and employers
- Family and friends of livability team members

### NOTES:

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- Community members who will benefit from participating in the livability initiative
- The community at large

**The Communications and Marketing Plan** on page 38 can help the team in its outreach efforts.

No municipality or citizen group alone has all of the financial and human resources that are needed to address the action plan.

In addition to helping ensure that community residents know why the team is focused on a particular issue and what it hopes to accomplish, community support can inspire residents to get involved by contributing their time, ideas and, sometimes, money.

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## Worksheet: **The Action Plan**

Community Name: \_\_\_\_\_

The Initiative's Vision: \_\_\_\_\_

The Initiative's Goal(s): \_\_\_\_\_

Partner Organization(s): \_\_\_\_\_

Other Involved Group(s): \_\_\_\_\_

<b>Activities</b>	<b>By Whom</b>	<b>By When</b>
<i>What needs to be done?</i>	<i>Who will be responsible for the task completion?</i>	<i>By what date will the action be done?</i>

Person/People Responsible for Maintaining and Updating Information: \_\_\_\_\_

Frequency and Schedule of Meetings: \_\_\_\_\_

Resources and Support		Potential Barriers or Resistance	Partnerships	Metrics
<i>Resources Available</i>	<i>Resources Needed</i>	<i>Which individuals and organizations might resist? How?</i>	<i>Which individuals and organizations should be informed about or involved with these tasks?</i>	<i>Which indicators will measure progress?</i>



Resources Needed	Community Contact	Team Member Responsible	Notes <i>(barriers, successes, schedule ...)</i>

## National Organizations

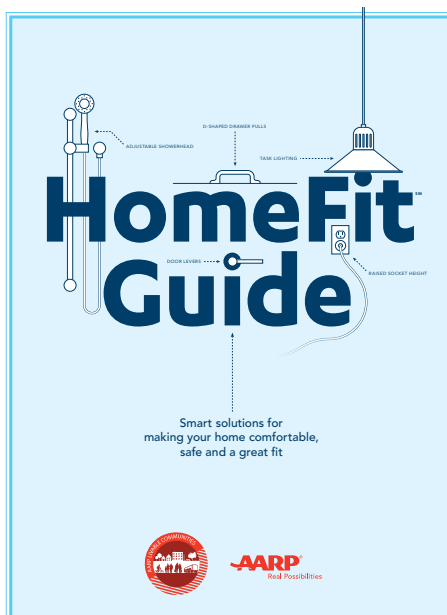
Search the Internet for the websites of the following organizations, each of which has helpful housing-related information and resources.

- American Institute of Architects
- Better Living Design Institute
- Center for Inclusive Design and Environmental Access (IDeA)
- Housing and Transportation Affordability Index (aka: H+T Index)
- National Association of Home Builders
- National Association of Housing and Redevelopment Officials (NAHRO)
- National Housing Conference
- National Housing Trust
- The RL Mace Universal Design Institute
- U.S. Department of Housing and Urban Development Comprehensive Housing Market Analyses

## AARP Resources

Visit [AARP.org/livable](https://www.aarp.org/livable), the website of the AARP Livable Communities initiative, and search for the following housing-related articles, fact sheets and guides. (Policy materials can be found via [AARP.org/LivablePolicy](https://www.aarp.org/livablepolicy).)

- [AARP.org/Livable A-Z Archives: Housing](https://www.aarp.org/livablepolicy)
- [AARP Accessory Dwelling Units: State Act and Local Ordinance](https://www.aarp.org/livablepolicy)
- [AARP Future of Housing](https://www.aarp.org/livablepolicy)
- [AARP HomeFit Guide and Worksheets](https://www.aarp.org/livablepolicy)
- [AARP Livability Fact Sheets: Density](https://www.aarp.org/livablepolicy)
- [AARP Livability Fact Sheets: Form-Based Code](https://www.aarp.org/livablepolicy)
- [AARP Policy Book: Livable Communities](https://www.aarp.org/livablepolicy)
- [AARP Public Policy Institute](https://www.aarp.org/livablepolicy)
- [AARP Research \(Livable Communities\)](https://www.aarp.org/livablepolicy)
- [AARP State Inclusive Home Design Advocacy Tool Kit](https://www.aarp.org/livablepolicy)
- ["Aging in Place: A State Survey of Livability Policies and Practices"](https://www.aarp.org/livablepolicy)
- ["Calling in an Occupational Therapist or Certified Aging-in-Place Specialist"](https://www.aarp.org/livablepolicy)
- ["Expanding Implementation of Universal Design and Visitability Features in the Housing Stock"](https://www.aarp.org/livablepolicy)
- ["5 Questions and Answers About Universal Design"](https://www.aarp.org/livablepolicy)
- ["How to Find an Age-Friendly Home: The Lifelong Housing Certification Program"](https://www.aarp.org/livablepolicy)
- ["Slideshow: Take a Look Inside an Aging-Friendly Home"](https://www.aarp.org/livablepolicy)



The *AARP HomeFit Guide* and its accompanying worksheets are available in English and Spanish. Visit [AARP.org/HomeFit](https://www.aarp.org/HomeFit).



## AARP Livability Index: Housing Score

### What is the *Livability Index*?

The AARP Public Policy Institute developed the *Livability Index* as a Web-based tool to measure community livability. Users can search the *Index* by address, ZIP code or community to find an overall livability score, as well as a score for each of seven major livability categories: housing, neighborhood, transportation, environment, health, engagement and opportunity. Users also can customize the *Index* to place higher or lower emphasis on the livability features of most importance to them. The *Livability Index* website provides resources to help consumers and policymakers use livability scores to effect change in their communities. It is the first tool of its kind to measure livability broadly at the neighborhood level for the entire country, and it is intended to inform and encourage people to take action to make their communities more livable.

### Why did AARP develop the *Livability Index*?

As the U.S. population ages, we face a serious challenge: Our communities are not prepared for an aging society. In an effort to address this urgent problem, AARP sought to help consumers and policymakers decide whether their communities are places where residents can easily live as they get older. Taking a multifaceted approach to assessing livability at the neighborhood level, AARP developed this groundbreaking tool to jump-start community conversations about livability and encourage action by consumers and policymakers alike.

### What measurements does the *Index* consider?

Taking a holistic approach to assessing community livability is important, because every place has unique strengths. Central neighborhoods in major cities have the advantage of being close to job opportunities, shops and entertainment options, while rural towns often have more affordable homes, safer streets and less pollution. The *Livability Index* measures housing, neighborhood, transportation, environment, health, engagement and opportunity characteristics. For each category, the *Index* evaluates current conditions using a diverse set of metric indicators, and considers policies and programs that can enhance community livability over time.

### The Housing Score, Explained

Home is where the heart is — and the same holds true for the *Livability Index*. Housing is a central component of livability. Deciding where to live influences many of the topics the *Index* covers. We spend more time in our homes than anywhere else, so housing costs, choices and accessibility are critical. Great communities provide housing opportunities for people of all ages, incomes and abilities, allowing everyone to live in a quality neighborhood regardless of his or her circumstances.

#### Metrics

- Housing accessibility: basic passage
- Housing options: availability of multifamily housing
- Housing affordability: housing costs
- Housing affordability: housing cost burden
- Housing affordability: availability of subsidized housing

#### Policies

- Housing accessibility: state and local inclusive design laws
- Housing affordability: state and local housing trust funds
- Housing options: state manufactured-housing protections
- Housing affordability: state foreclosure prevention and protection
- Commitment to livability: state and local plans to create age-friendly communities

The AARP Public Policy Institute is always looking for better ways to measure livability. Metrics may change as new ways to measure housing are found. Find the *Livability Index* and more information at [AARP.org/LivabilityIndex](https://www.aarp.org/LivabilityIndex).

## Best Practices: Housing

- In **Bath, Maine**, a group of volunteers works with Habitat for Humanity (*Habitat7rivers.org*) and the Bath Housing Authority (*Bathhousing.org*) to make the homes of older people safer, accessible and more comfortable.
- In **Bowdoinham, Maine**, the age-friendly initiative created a **Tool Table**, a display of items that can make everyday life easier — including jar openers and seat belt extenders. Residents of Bowdoinham and the surrounding area can borrow items for up to three weeks to try at home. Visit *AARP.org/Livable-Lessons* to read the article “How to Create a ‘Handy Tools’ Display.”
- In **Southern Oregon’s Rogue Valley**, a voluntary evaluation program, the *Lifelong Housing Certification Project*, provides a way to assess the “age-friendliness” and accessibility of both newly constructed and existing homes. Developed by the Rogue Valley Council of Governments in collaboration with AARP Oregon, the program includes a comprehensive checklist of features and defines levels of certification based on various universal design standards (elements and safety features that help make a home livable for people of all ages). Learn more by visiting *AARP.org/Livable-Lessons* and reading the article “How to Find an Age-Friendly Home.”

Read, order or download the **AARP** *Roadmap to Livability: Housing Workbook* and other resources at [AARP.org/Livable](https://www.aarp.org/Livable)

To stay informed about livability efforts nationwide and receive our newest livability materials, subscribe to the free, award-winning **AARP** *Livable Communities e-Newsletter*  
Sign up now at [AARP.org/Livable-Subscribe](https://www.aarp.org/Livable-Subscribe)

We want to hear about your community and its progress.  
Complete the form at [AARP.org/SharingLivableSolutions](https://www.aarp.org/SharingLivableSolutions)

Find the **AARP** state office near you at [AARP.org/States](https://www.aarp.org/States)

Email the **AARP** Livable Communities initiative at [Livable@AARP.org](mailto:Livable@AARP.org)

Contact **AARP** at 1-888-OUR-AARP

The *AARP Roadmap to Livability Collection* is a collaborative effort of AARP Livable Communities “Core Team” members  
Director: Danielle Arigoni | Senior Advisors: William Armbruster, Melissa Stanton (Editor), Mike Watson | Advisor: Rebecca Delphia  
as well as consultants Victoria Lemley and Patricia Oh.

The *AARP Roadmap to Livability Collection* was designed by Jennifer Goodman

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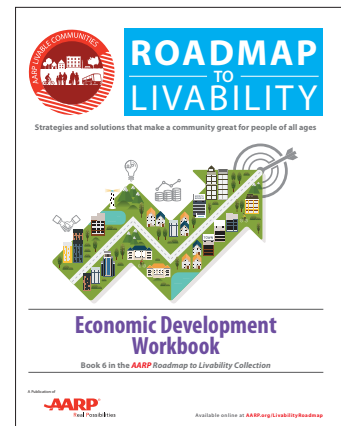
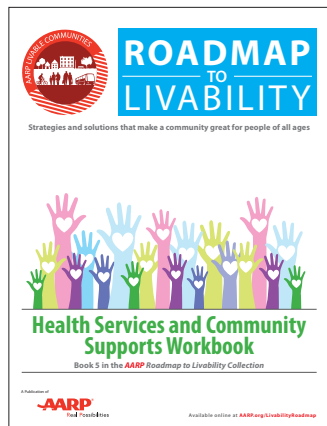
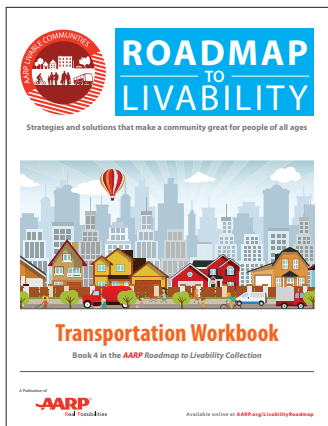
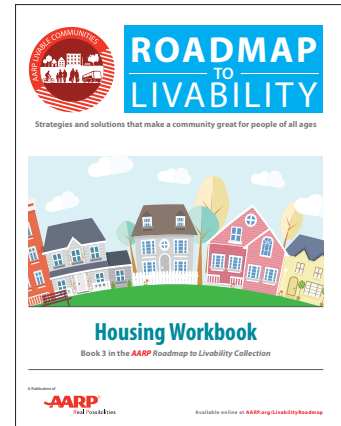
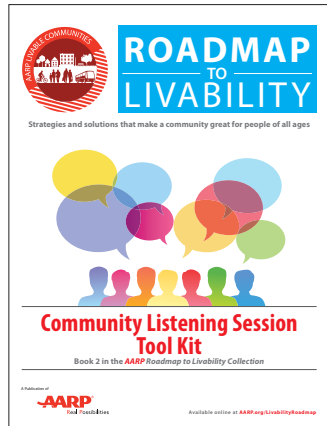
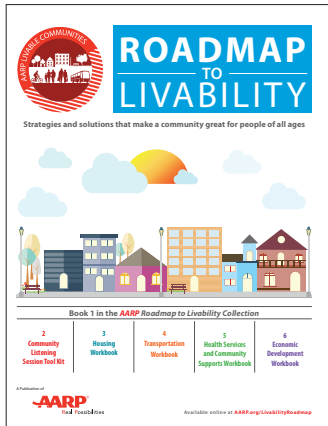
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Strategies and solutions that make a community great for people of all ages.

[AARP.org/LivabilityRoadmap](http://AARP.org/LivabilityRoadmap)



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