

Aging Well in Communities:

A TOOLKIT FOR PLANNING, ENGAGEMENT & ACTION

Eighty million members of the boomer generation have reached or are approaching the traditional retirement age of 65. By planning now, local governments and their partners can help these boomers age in place. And they can reap the benefits of an active, engaged population committed to improving the community.



A Center of the Public Health Institute



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Boomers overwhelmingly want to age in place. Yet few communities are prepared to meet the needs of older residents, or to engage these residents in civic life.

In response, the Center for Civic Partnerships created *Aging Well in Communities: A Toolkit for Planning, Engagement & Action*.

THIS TOOLKIT INCLUDES:

- A **community planning overview**, which presents key elements of a healthy aging planning process
- **Step-by-step guides for three important data-gathering activities:**
 1. Resident surveys
 2. Public forums
 3. Focus groups
- **Case studies** that show how seven communities are addressing the needs of an aging population
- A **Resource** list of web sites and organizations offering valuable information on aging-related issues

You'll find the complete toolkit on the CD located on the inside back cover of this introductory publication. You can also download the toolkit from our web site at www.civicpartnerships.org.

We encourage you to use this toolkit to begin your own planning process. By doing so, you can help ensure a better quality of life for older residents, and a richer, more vibrant future for your community.



Introduction

Eighty million members of the boomer generation (born between 1946 – 1964) have reached or are approaching the traditional retirement age of 65. Yet their experience as older adults is likely to be anything but traditional. Boomers are redefining what it means to be “old.” They may not retire completely from full-time employment, instead transitioning to part-time employment, consulting, or even full-time volunteer work. They want to “age in place” rather than moving out of their communities. They are looking for ways to stay active—physically, mentally, and socially.

The numbers are dramatic. In California alone, 11% of the state’s population is at least 65 years old. By 2030, the number of Californians age 65 and older will double, growing from 3.6 million to 8.9 million. The fastest-growing segment of the older population is people age 85 and older.

This significant demographic shift is compelling local governments in California and across the United States to initiate planning efforts and re-evaluate community-based services in order to promote healthy and vital aging in their communities.

What Changing Demographics Mean for Local Government

The aging of the boomer generation presents both challenges and opportunities for local governments, nongovernmental agencies and service providers, nonprofit organizations, businesses, and other community stakeholders.

Boomers, whether they retire or not, want to “age in place.” They enjoy their communities and homes. They have existing social networks that they value. Most significantly, they want to remain active and engaged. They’ve developed a rich array of skills, knowledge, expertise, and relationships. They also have time and energy to devote to their communities. “Improving society” has always been a hallmark value of this generation. If local governments and nonprofit organizations intentionally and actively seek to engage boomers as part-time employees and volunteers, boomers can become an impetus for new social progress and community enrichment.

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Local governments and their partners must consider to how best engage increasingly diverse communities in their planning processes.



Aging boomers will likely expect an increase in affordable and accessible housing, and more convenient, accessible transit. Accordingly, land use patterns will evolve, with smart-growth and infill strategies replacing spread-out suburban developments. Compact, mixed-use, and transit-oriented developments will become more popular. Active boomers will seek out walkable and bike-friendly communities. In turn, these types of land use patterns will promote healthier lifestyles.

Boomers will need and demand “age-friendly” services from local governments and their partners. Yet service providers may need to shift their perspective—current services (like those offered through the traditional senior center model) may not be appropriate or desirable for the boomer generation. To meet new and different needs, local governments and their partners will need to coordinate the delivery of supportive services at the local level. Community services may change as well. For example, in a variety of polls and surveys, boomers say they want to stay physically active and improve their diets. But at the same time, the number of people coping with chronic health conditions, such as obesity, diabetes, and arthritis, continues to grow. As a result, the number of injuries sustained in the home and the community could also grow, triggering increased use of costly police and paramedic services.

California’s population will become even more diverse in the years ahead. California leads all other states in the percentage of its population born outside the United States. According to U.S. Census 2000, California is home to large groups of immigrants from more than 60 countries, and no race or ethnic group consti-

tutes a majority of the state’s population. Local governments and their partners must consider how best to engage these increasingly diverse communities in their planning processes, especially those that address land use and service delivery. They must also consider how people’s cultures and backgrounds may influence expectations about what local government should provide.

Why a Toolkit is Needed

The Center for Civic Partnerships’ mission is to provide leadership and management support to build healthier communities and more effective nonprofit organizations. Its parent organization is the Public Health Institute (PHI), one of the largest and most comprehensive public health organizations in the United States.

Over the past several years, the Center has focused on developing effective strategies to assist communities in planning for the overwhelming desire of older adults to age in place—either in their own homes or, at a minimum, in the community where they reside. The Center’s groundbreaking 2006 publication, *A Healthy Community Perspective on Aging Well*, is a call to action for policymakers, chief executives, planners, businesses, nonprofit leaders, and residents. It presents promising practices, strategies, and resources that communities can use to improve older adults’ health and quality of life. It identifies six key areas as critically important to successful community-based planning for aging: housing, mobility/transportation, lifelong learning, employment, supportive services, and community involvement.

As part of its work on *Aging Well*, the Center provided funding to communities to assist them in planning for healthy aging. For these communities, a necessary first step was to find out what was really going on in their communities. Were residents planning to stay in the community as they aged? How did they envision community life? What kinds of services would they want? Where did they expect these services to come from?

Yet gathering this information was challenging for many communities. Some didn't know how to approach the task. Others lacked support among key stakeholders. Some had bits and pieces of information, but not a cohesive, comprehensive set of data. Others looked to informal networks that provided some level of feedback, but that didn't necessarily represent all stakeholders and points of view.

The Center realized that before communities could embark on a healthy aging planning effort, they needed a structured process for gathering data and information directly from the community itself. Out of this need grew *Aging Well in Communities: A Toolkit for Planning, Engagement & Action*.

How This Toolkit Helps Local Governments

This toolkit gives local governments the resources they need to successfully plan for healthy aging in their communities. It breaks down the healthy aging planning process into manageable steps and gives specific guidance for each. It provides a structured process for gathering different types of information from different sources at different times. It offers ways to involve residents, local government,

older adult service providers, businesses, faith communities, nonprofit organizations, and other stakeholders representing the diversity of your community in the planning process. It presents a path to a future where older residents can age in place while continuing to engage in and contribute to the community.

To Proactively Plan or Not?

If local governments and their partners do not plan for their aging populations, they will experience higher costs, resource deficits, lost opportunities, and political upheaval as boomers demand accommodation, and communities must retrofit and make improvements in a compressed timeframe.

But if local governments and their partners do plan, they will see new opportunities for social innovation, increased local investment, and an engaged population committed to improving and enriching the community.

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The choice is ours.

This section was authored by Dr. Frank Benest, Senior Advisor, International City/County Management Association and former City Manager of Palo Alto, California.

City of Hayward**Location:** Alameda County, California**Population:** 143,407 (2008)**Ethnic composition:** 37% White, 27% Hispanic or Latino, 23% Asian, and 11% Black or African American**Median age:** 36.8 years**Adults ages 45 to 64:** 36,317**Adults ages 64 and older:** 15,023**Percentage of adults ages 45 and older compared with total population:** 36%**Median household income:** \$60,771 (2007)**Other key information:** Hayward's population has grown by more than 20% over the past 15 years.

Within the city are two Bay Area Rapid Transit (BART) stations, an Amtrak station, an extensive network of freeways, and public transportation services that provide access to major airports serving the San Francisco, Oakland, and San José regions.

HOUSING | MOBILITY | TRANSPORTATION

Industry: Local Government Agency**CHALLENGE**

California cities must, by law, plan for ways to provide affordable housing to their residents. According to the California Department of Housing and Community Development, "The California Housing Element Law of 1969 requires each city to adopt a housing element as part of its general plan to meet 'fair share planning' for housing to accommodate all income groups" (i.e., families and individuals with low, very low, and moderate incomes) and special-needs populations (e.g., historically underserved communities of color and diverse ethnic composition).

The drastic drop in the housing market and the corresponding drop in property tax revenue made the task of producing an adequate supply of affordable housing even more difficult for Hayward, as for many other cities across California and the United States. Developing affordable housing has long been a formidable task, especially in the Bay Area, where the cost of living is significantly higher than in most regions across California. In "built-out" cities and suburban communities, finding land suitable for infill development (developing vacant or underused land within existing urban areas) to provide more affordable housing is challenging. Infill development can be unpopular with existing residents, and less profitable for developers and investors than other types of development.

For older adults, not only is it difficult to find housing at a reasonable cost, but it can also be difficult to find housing that meets their needs. Buildings are often designed inside and out in ways that make them unsuitable for people with a limited range of physical ability. For example, there may be multiple stories with staircases, narrow hallways and doorways, or primary rooms, such as bathrooms and bedrooms, on upper levels.

Meanwhile, restrictive local zoning laws contribute to the dearth of affordable housing by not allowing for shared housing, accessory dwelling units (e.g., "granny flats"), and mixed residential-retail developments. Ineffective planning and coordination during the housing development and planning processes often means a failure to consider the issue of providing residents with easy access to public transportation, stores that serve the neighborhood, and other support services, such as clinics and community centers.

SOLUTION

The Hayward City Council recently voted to approve the development of a transit-friendly village adjoining the Bay Area Rapid Transit (BART) station in south Hayward. The development, known as the South Hayward BART Transit Village, will include 788 residential units, 206 of which will be reserved for low-income older adults and families. These units are part of a high-density development that will include a Safeway grocery store with affordable apartments located above it.

Although the City of Hayward does not own the land slated for redevelopment, the city still played an integral role in moving this far-reaching project forward through both citywide policies and project-specific efforts.

The City of Hayward's existing inclusionary housing ordinance requires that any development at this BART station include units for low-income residents in addition to any proposed market-rate housing. Early in the project's planning and design phase, the city established a partnership with Eden Housing, a nonprofit affordable housing developer with a strong, successful history in Hayward going back more than 40 years. Since 1973, Eden Housing has completed more than 5,000 units of affordable housing for families, seniors, and individuals with special needs—with more than 20 developments in Hayward alone. For this particular project, more than 26% of the total units proposed will be affordable. This number exceeds the city's minimum standard, which, according to its inclusionary ordinance, is 15%.

The city laid the groundwork for this development through a series of community planning meetings that not only led to community support for increased densities at this location, but also paved the way for the California Environmental Quality Act (CEQA) clearance necessary for the project. City staff, with their partners at BART, began the visioning and planning process for the neighborhood long before the current development team (including Eden Housing and the master developers, Wittek Development and the Montana Property Group) stepped forward with a specific proposal. The city began by assembling a technical advisory group (TAG) consisting of staff from the city's Community and Economic Development Department, Redevelopment Agency, and Public Works Department. These stakeholders reviewed possible development schemes and identified opportunities and potential impacts.

The city then hosted three community meetings to gather input from neighborhoods surrounding the development site, community leaders, and residents. The first meeting served as a kickoff for the project and a review of existing conditions. At the second meeting, participants reviewed and provided feedback on two preliminary land use scenarios for the station area. The final meeting, a city-hosted community workshop, took place after the public review draft of the Concept Design Plan was released.



The Concept Design Plan formed the basis of a program-level Environmental Impact Report (EIR), which the city prepared to review the impact of proposed zoning changes (higher densities) in the South Hayward BART station area and a general plan amendment. The City of Hayward certified the EIR and approved related general plan and zoning ordinance amendments in June 2006. With the program-level EIR and rezoning process complete, the development team quickly secured CEQA clearance for the proposed development.

Two BART parking lots and a privately held lot currently occupy the site of the transit village. To achieve optimal transit-oriented and infill densities, the project must complete roughly \$44.6 million in new infrastructure construction, including \$19.9 million for BART replacement parking, \$9 million for public parking to support the retail uses, nearly \$6.5 million in parking structures for the affordable housing, and approximately \$9 million to support rebuilding of surface arteries, pedestrian access, and bus transfer stops.

The City of Hayward's Redevelopment Agency has conditionally committed nearly \$20 million to support this project. Approximately \$12.7 million will be allocated to fund a portion of the required infrastructure, including the public parking to support neighborhood retail uses. About \$7.1 million will be allocated directly to the affordable housing component as a subsidy.

The transit village project has also secured a commitment from the State of California for an additional \$47 million. The project will receive a \$30 million Infill Infrastructure Program Grant and a \$17 million Transit-Oriented Development (TOD) Housing program loan. These funds are available through the Housing and Emergency Shelter Trust Fund Act (Proposition 1C), which California voters approved in 2006. The State Department of Housing and Community Development (HCD) administers Prop 1C funds.

The project will be built in phases over several months, with the first phase encompassing the building of the Safeway grocery store and affordable housing units.

RESULTS

The South Hayward BART Transit Village is located on a 12-acre site and will adjoin the BART station and the Alameda-Contra Costa (AC) Transit bus hub. These transit facilities will connect residents to a number of regional employment centers, such as downtown San Francisco and Oakland, three international airports, an Amtrak rail stop, and a number of smaller central business districts. The shopping center will house a large grocery store, delicatessen, and coffee shop. All these amenities will be within walking distance of each other.

High-density development projects that include mixed land use increasingly serve as a method for preserving open space and building more affordable housing at the same time. Identified as a component of "smart growth," mixed land use involves locating housing, transportation, and other key consumer services, such as retail centers and restaurants, in close proximity to each other, thus creating a more livable environment for residents. In general, mixed land use requires special zoning. According to the National Association of Home Builders (NAHB), when considering mixed-use and higher-density developments, "It is well understood that higher densities are needed if good transit service is to be feasible."

City leaders envision that the South Hayward BART Transit Village will revitalize the community and transform the area, which includes a large, underutilized parking lot, into a vibrant neighborhood and transit hub.

AGING WELL BENEFITS—HOUSING/MOBILITY/TRANSPORTATION

The South Hayward BART Transit Village project reflects two major local healthy aging planning successes:

- Increasing access to affordable housing for low- and moderate-income older adults
- Using a high-density and mixed land use planning and development approach

Developing more options for affordable housing in a community helps create economically diverse neighborhoods, offers residents the opportunity to live close to work and shopping, and provides a stable community home for older people who might otherwise be struggling with rising rent payments in apartment complexes. Affordable and safe housing for older adults is a key component when considering access to an array of local, community-based, long-term care services. According to an International City/County Management Association (ICMA) publication about active living and older adults, “Creating more livable communities reduces costs associated with social services and health care, and yields a range of social and economic benefits by extending and expanding older adults’ contributions to civic life.”

The transit village project offers an example of how to successfully plan for and create a community that promotes neighborliness and ease of access for all residents, especially those whose mobility is impaired due to chronic illness, injury, or advanced age.

Higher-density housing developments help make communities “walkable” and transit-oriented by providing a critical mass of residents who need neighborhood shops and services, as well as transportation to and from the development, grocery stores, and a variety of community-based agencies. These developments increase socialization and improve access to support services, which in turn promotes better health and reduces isolation among older adults who may not have family or friends in the area.

Moreover, providing a diverse mix of services near or surrounding residential areas creates an environment that encourages walking and bicycling. More physical activity among older adults helps control weight and contributes to healthier bones, muscles, and joints, thus reducing the chance that an older adult will fall and sustain a costly injury. Major chronic conditions, such as diabetes, heart disease, and arthritis, that are more common in older adults may improve significantly with higher levels of exercise and physical activity. Being physically active also decreases symptoms of depression and anxiety, can lessen the need for medications in some cases, and, ultimately, can reduce visits to physicians and hospitals.



PROMISING PRACTICES—LESSONS LEARNED

- Revise zoning ordinances to support mixed land use, including transit-oriented development.
- Promote mixed-use housing developments to enhance access to transit, shopping, neighborhood and retail services, and other community resources.
- Integrate supportive services into affordable housing projects for older adults.
- Leverage funds from a variety of sources to meet affordable housing needs.
- Use transit-oriented development to address a variety of affordable housing, sociability, health, mobility, and social service-related needs of older adults.

CONTACT

David Rizk
Director of Development
Services
City of Hayward
City Hall Building
777 B Street
Hayward, CA 94541
(510) 583-4004
david.rizk@hayward-ca.gov

Linda Mandolini
Executive Director
Eden Housing
22645 Grand Street
Hayward, CA 94541
(510) 582-1460
lmandolini@edenhousing.org

Andrea Osgood
Project Developer
Eden Housing
22645 Grand Street
Hayward, CA 94541
(510) 247-8103
aosgood@edenhousing.org

City of Hayward
(510) 583-4000
www.ci.hayward.ca.us

Eden Housing
(510) 582-1460
www.edenhousing.org

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- COMMUNITY PLANNING OVERVIEW
- PLANNING GUIDES
- CASE STUDIES
- RESOURCES

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TOOLKIT CONTRIBUTORS

Linda V. Peek, Technical Writer/Consultant
Clare Smith, Research Associate, Center for Civic Partnerships
Joan Twiss, Executive Director, Center for Civic Partnerships
Kathryn Ankrum, Editor
Kathleen Finney, Designer | f troop design



Center for Civic Partnerships
1851 Heritage Lane, Suite 250
Sacramento, CA 95815
Tel: (916) 646-8680
Fax: (916) 646-8660
Web site: www.civicpartnerships.org
Email: ccp@civicpartnerships.org