

Attachment B: Affirmative Marketing Plan Standards

The Community Development Division (CDD) requires that all CDD-funded projects submit an Affirmative Marketing Plan (AMP) for review subject to City approval. At minimum, AMPs must adhere to all state, local, and federal fair housing requirements in addition to CDD requirements.

This document is provided to assist Development Teams, including Property Management (“PM’s”), in drafting an Affirmative Marketing Plan (AMP). These standards serve to align the City’s goals with those of the project (the “Project”) and to ensure that all Madison residents have equal access to fair housing opportunities. These standards are not intended to be a complete or exhaustive list of what should constitute an AMP. In creating this Project’s AMP, housing developers and property managers should consult with their attorneys to ensure that the AMP complies with all applicable laws and regulations, program requirements, and the Fair Housing Act.

The AMP must clearly identify the Project’s targeted populations and outreach methods including the following:

A. Targeted Outreach:

1. **Race, Age or Disability.** The AMP must identify the demographic groups that are “least likely to apply” for this housing without affirmative outreach. In determining which groups should be identified, PMs should consider rent rate levels, the population of the broader housing market area, and especially the racial/ethnic composition of the neighborhood in which the property is located.

The AMP must describe the demographic target population(s) least likely to apply in a manner that does not diminish or obstruct the Project’s fair housing obligations.

- i. **Race.** Historical CDD occupancy data shows that Hispanic/Latinx and Asian households are under-represented in CDD-supported housing. Direct and effective outreach methods, especially considering language access, should be clearly described in the AMP.
 - ii. **Age-Restrictions.** The AMP must identify the **age-restriction**, or lack thereof, regarding age-related tenancy requirements for the Project. Acceptable age-restrictions may be described as “family” housing for units without an age-restriction, regardless of household composition; “active-adult” or “senior” housing for units restricted to households with at least one member aged 55 and above; and “elderly” housing for units restricted to households aged 62 and above.
 - iii. **People with Disabilities** must be provided reasonable accommodation(s) as needed to access housing opportunities. Property Management should ensure that marketing, information and access to the application process is low-barrier for all applicants and does not impose preventable barriers to individuals with disabilities. For example, accommodations may include meeting via zoom, phone, at a location other than the leasing office/trailer, etc.
2. **Populations Needing Supportive Services** (e.g., individuals and families experiencing homeless, formerly incarcerated, other targeted population, etc.). The AMP must identify the populations targeted to lease Integrated Supportive Housing Units (“SH Units”) in the Project, as applicable and described in the TSP. CDD requires a written, detailed Lease-Up Coordination Process to be developed and used by the developer, Property Management, and Supportive Services Coordinator.

The AMP must describe effective outreach efforts to successfully lease units to targeted populations identified in the Project's application for City financial assistance as well as its approved WHEDA LIHTC application Appendix S, as applicable. Any discrepancies in the target populations described in these or other funder's applications must be addressed before entering into the City of Madison Loan Agreement.

B. Marketing Efforts and Outreach Methods:

The AMP must describe the marketing efforts anticipated to be used to attract the demographic target population(s) identified as least likely to apply, as well as all segments of the eligible market population. These efforts should identify:

1. The **types of media** and/or advertising activities used to market the development, including the names of publications, social media, and/or websites to be used, as it relates to the likely exposure of the specific "least likely to apply" intended audience of each marketing effort;
2. The **languages** in which the marketing will be available as it relates to the likely needs of the specific intended audience of each marketing effort. *Authentic Language Access to the application process must be provided for potential applicants with Limited English Proficiency (i.e. English is not their primary language) and Non-English Speaking Applicants.* If the application itself is not available in the primary language of the applicant, Property Management must ensure that translation and/or Language Line services are available to assist households with questions on the application and/or development. It is expected that marketing materials and signage/marketing on-site be available in languages other than English. This should include, at a minimum, materials translated in Spanish describing the development, when it is opening, and how residents can apply. General and Project-specific websites should contain an easily accessible option to facilitating Language Access and translation (e.g., Google Translate plug in or equivalent), if feasible to do so. PM's are strongly encouraged to hire bilingual staff whenever possible. PM should provide translation services as requested or required for potential applicants to access this housing opportunity. Depending on the location of the development, CDD may require additional language access requirements for the minimum marketing materials, such as translation to other pre-identified languages.
3. The **duration** that each of marketing effort will be published by media type (e.g., newspaper, radio, online listings, social media, etc.) as it relates to the outreach methods most effective in reaching each "least likely to apply" group.
4. Specific **community organizations and contacts** must be identified when describing targeted outreach, with a special emphasis placed on those agencies able to assist with outreach directly to populations identified as least likely to apply. CDD staff can assist housing providers in identifying points of contact and agencies to best meet the intent of the AMP, and may add additional suggested or required contacts periodically.
5. Any graphics or **marketing materials that depict people must be inclusive, diverse, culturally-sensitive and representative** of the demographics of target populations identified in the AMP as well as the population(s) targeted for SH Units described in the Tenant Selection Plan, as applicable. Pursuant to the Loan Agreement, marketing materials will be reviewed by and are subject to City approval. Typically, the easiest juncture at which to address inclusive and affirmative marketing is with the earliest architectural renderings that depict people.
6. **Leasing office and process must be physically and practicably accessible** for applicants including people with disabilities, in accordance with the Loan Agreement. Before commencing the Lease-Up Coordination Process, PM must indicate a location that is both

physically accessible and accessible via transit to submit applications, documentation, conduct interviews, etc. If leasing office is not both physically accessible and accessible via transit, an alternative location must be provided. Property Management may not require in-person attendance for interview and documents for any applicant, if an accommodation is requested.

C. Marketing and Lease-Up Timeline.

1. Initial Lease-Up. The AMP should specify the approximate start date of marketing activities to groups targeted for special and/or affirmative outreach and the expected date of initial occupancy. CDD requires that Property Management ("PM") perform targeted outreach for SH Units begins at least 30 days before marketing to general population.
2. Future and Continued Marketing Efforts. The AMP should include a statement or description of how the housing provider will continue affirmative marketing efforts after initial lease-up is complete to maintain affirmatively representative housing community. The Equal Housing Opportunity logo is required on all notices, lease documents, and marketing materials, and the Fair Housing poster must be displayed in the leasing office.

D. Staff Experience. The AMP should indicate the experience, training, and certification(s), if any, held by staff that will be involved in marketing and lease-up of the property. The AMP should mention that a hard copy of the plan, and any other written materials regarding fair housing laws, will be available on request in the leasing office.

E. Recordkeeping and Evaluation. PM's must maintain copies of their Affirmative Fair Housing Marketing Plans and keep records of their actions to affirmatively market the program, subject to CDD review. PM's also must evaluate the success of their affirmative marketing activities annually and adjust efforts accordingly.

While not explicitly required, the City of Madison will also accept a HUD template Affirmative Fair Housing Marketing Plan (HUD Form 92243-PRA) that incorporates the above standards. HUD also publishes related Affirmative Fair Housing Marketing Guidance in further detail. The City of Madison and the U.S. Department of Housing and Urban Development (HUD) stress the importance of implementing the AMP consistently during initial and ongoing lease-up.