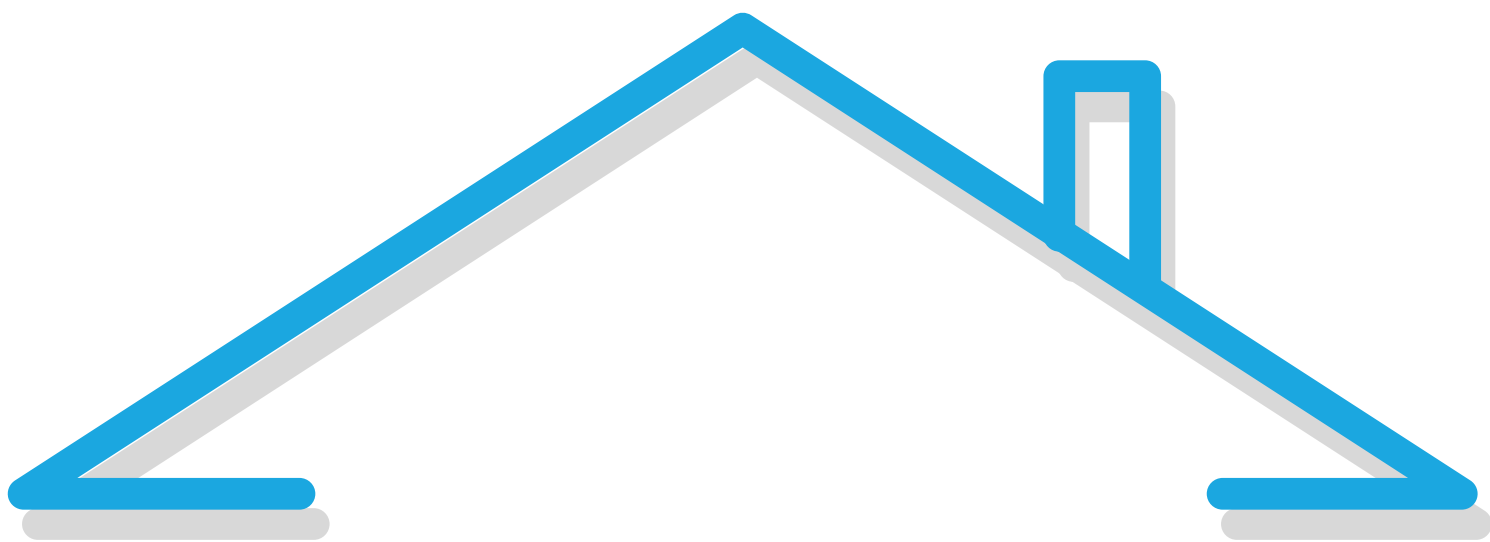

Promoting Your Local Owner Occupied Rehabilitation Program



Outreach Toolkit



Introduction



The Owner Occupied Rehabilitation Grant empowers Indiana communities to establish local home repair programs. Awarded communities create programs that directly fund home repairs on owner occupied residential properties. Through the Indiana Office of Community Affairs program, rehabilitation activities may include:

- Roof replacement or repair
- Heating / Cooling system replacement
- Water heater replacement
- Select lighting and electrical upgrades
- ADA accessibility modifications up to the threshold of the home

This program allows communities to improve their housing stock and for low-income homeowners to age in place, have better mobility, and make needed repairs for their comfort and safety.

As you are designing your local Owner Occupied Rehabilitation program, a key factor to success is making sure homeowners know about the program and how to apply. It's also important to know about other stakeholders and the information they'll need, such as local contractors who may bid on the home repair projects.

A program promotion plan is a required upload for each OOR Grant Application. This Outreach Toolkit does not need to be submitted with your application, but it does outline some of the basic questions to consider as you are developing both your OOR program and outreach strategy.

You can learn more about each round of OOR funding on the [OCRA website](#). You can also learn more about U.S. Department of Housing & Urban Development programs on their [Home Improvements page](#).

Thank you to the grant administrators and community organizations whose experience and feedback shaped this toolkit!

Start with the details



Clarifying Program Information

For clear communication, it helps to start with the basics. Reflect on the program goals and what specific demographics of homeowners the program will need to reach. For the CDBG Owner Occupied Rehabilitation Program, all homeowners will need to be Low- or Moderate-Income households, as determined by [your community's HUD data](#). Some programs will also work specifically with people with disabilities, older adults, veterans, or single-parent households. Knowing these target audiences ahead of time can help you determine the most effective modes of outreach.

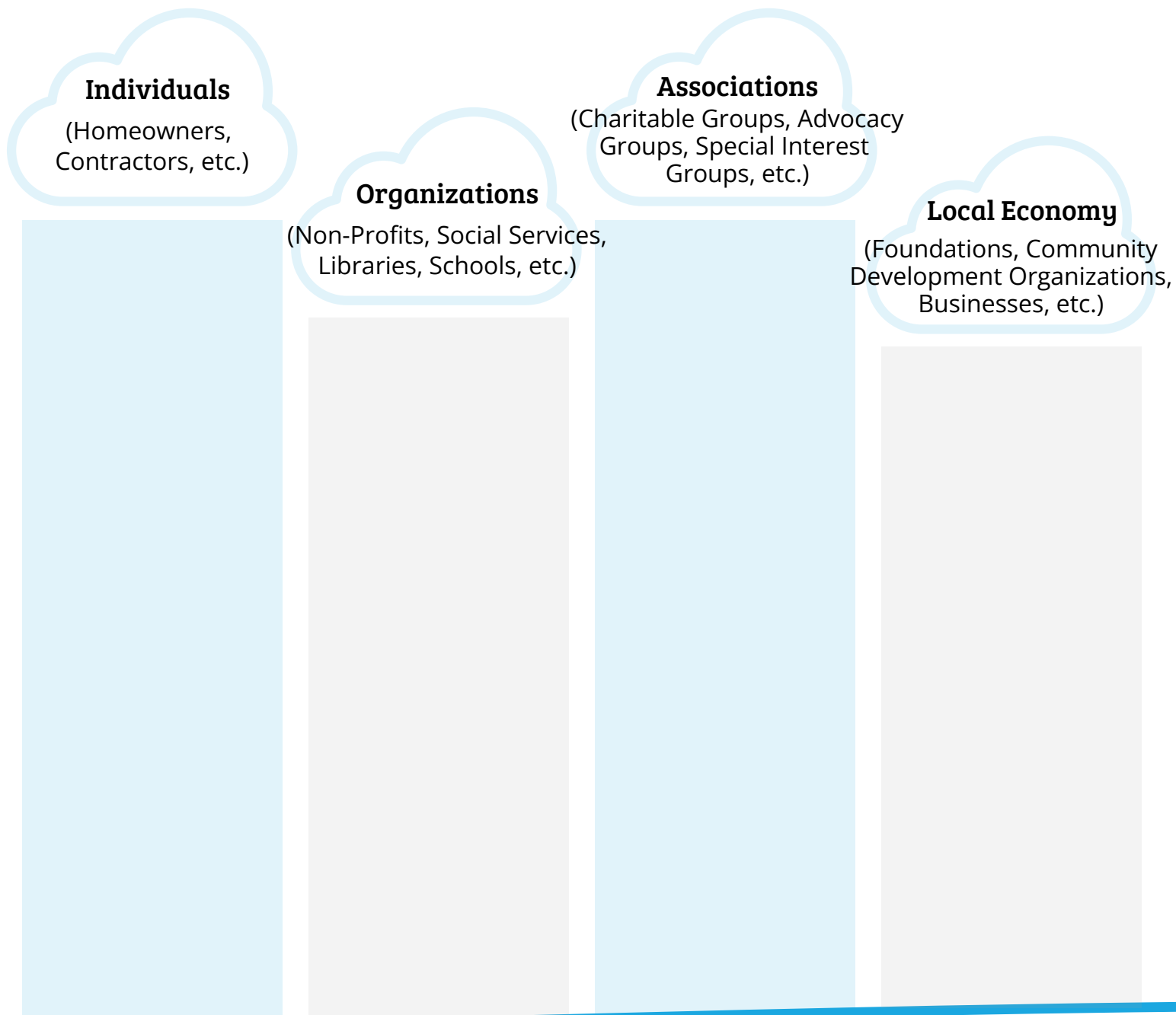
Once you know your general target audience, define your program details as clearly as possible. You'll need to let homeowners know how they can qualify for the program, what types of rehabilitation activities your program allows, how long applications will be open, and more. Knowing this information in advance helps you to coordinate with program partners, efficiently address questions from applicants, and publicize the available resource.

Questions to Consider

1. Who are the homeowners that can qualify for your program?
2. What information will they need in order to know that they qualify, and to feel confident about applying for the program?
3. What might be some questions homeowners would have before applying, and how can you address those in advance?

Identifying Program Stakeholders

Ensuring that homeowners know about the program and how to apply is essential. There are also other key community stakeholders that need to know about your program for it to be successful. Local contractors who might bid on the home repair projects need to know about the program and how it works. Other local organizations who work toward similar goals can be informed about the program, since they might be able to help with promoting your program to their clients or setting up cross-referrals if homeowners need repairs that your program can't cover. Use the template below to brainstorm a **community asset map** that determines your list of stakeholders. These are the audiences your outreach strategy will need to include.



Working With Program Partners

Now that we've identified all of our community assets, we can explore potential partnerships that would support our program. Discussions about formal partnerships, such as forming a cross-referral process, should begin before your application is submitted so that details about collaborations can be included in your narrative. Informal partnerships, such as an organization hanging up a flyer about your program, won't need a detailed agreement, but can be described in your promotional plan.

Some examples of partnership include:

- A food pantry handing out OOR flyers to their clients to promote the program
- Receiving referrals from another community agency, such as from a Weatherization program
- Collaborating with an economic development organization that provides match funding for the grant

As you are working with program partners or sharing information with local stakeholders, decide ahead of time how to address questions from homeowners. Who should homeowners contact, and how, if they have questions or need support completing an application? If they don't qualify for your program, are there other nearby resources that could provide support? Providing this information to your partners makes their work easier and makes the process smoother for applicants. (If you are receiving referrals from another organization, make sure they know what the homeowner selection criteria are and what types of home repairs your program funds. This can help prevent referrals that don't actually qualify for your program, which can reduce frustration from ineligible applicants.)

You can use the chart on the following page to keep track of your stakeholders and how they interact with your program. Refer to your community asset map from the previous page, and assign each stakeholder to the category you'd like to engage them in. This will help you define which stakeholders are your target audience for general promotion, and which groups need more communication about program development and partnership structures.

Partners

Involved with making decisions, contributing resources, or carrying out tasks related to the program, like providers of match funding.

Promoters

Shares program information with your target audience, such as a food pantry handing out brochures to clients, or a utility office displaying a flyer.

Advisors

Provides input based on how the program will impact their own work or lives, like housing social service professionals or residents.

Target Audience

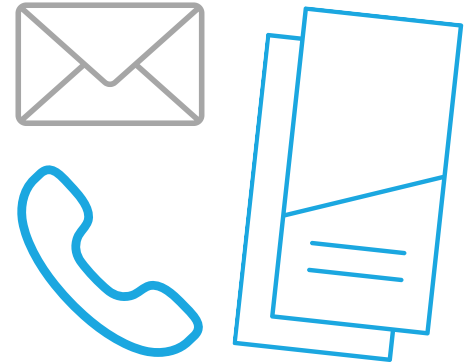
Is kept in the loop on project progress, like homeowners waiting for applications to open.

Getting the word out



Choosing Promotional Strategies

There are two groups of people to keep in mind when you are selecting outreach methods to market your program: the audience you are trying to reach, and the team who will be carrying out your promotional plan. As you're designing program promotion, simultaneously consider what methods will be effective with your target audience, along with what methods line up with the budget, staff capacity, and time you have. You can also think about how these strategies work with your promotional partners who are willing to help spread the word about your program.



Keep your program goals in mind as you are choosing your promotional methods. Depending on how many awards you plan to make, you can align your promotional effort with the size of the applicant pool you want to attract. Explore what methods are most cost- and time-effective for the size of your planned program. (Jump ahead to the **Tracking your impact section** to choose progress indicators that align with your promotional strategies!)

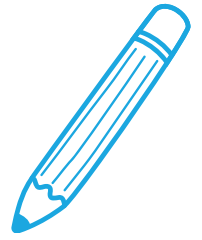
If you are a returning applicant with previous OOR experience, it is also helpful to evaluate what you've done in the past and what was effective in your previous program. Are there any themes in where your applicants or referrals came from? Are there any promotional efforts that were overly time-consuming compared to the impact they had? This information can guide your next outreach strategy.

Some promotional strategies to consider include:

- Direct marketing: Mailings, emails, or sharing information on a website
- Personal contact: Word of mouth, public meetings, community champions or testimonials, phone calls, letters, or referrals
- Publicity: Newspaper, TV, or radio announcements, social media promotion
- Partners: Sharing flyers, posters, or brochures at other locations your target audience has access to

Craft Your Key Message

A clear, consistent message is essential for getting your audience the information they need to participate in your program in the way that makes sense for them. Revisit the list of partners and roles from page 6 to determine what your messaging needs might be.



For example, potential applicant homeowners will need different information and resources compared to contractors who might bid on the rehabilitation projects. As you're developing a key message for each group, consider what information is vital to their participation, what questions they might have, and what benefits might persuade them to get involved.

Once you have an idea of your key message for each group, double check that all of your information aligns. Starting by clarifying commonly asked questions, program requirements, and other information that might go to multiple groups reduces confusion later on and keeps all stakeholders on the same page. It also helps to simplify and refine your marketing efforts since you already know what message you need to convey and to whom.

Audience:

Potential Questions:

Benefits:

Essential Info:

Considering Audience Needs

While you're developing your key messages and promotional strategies, keep accessibility in mind for your target populations. The language you use to craft your key messages should be in straightforward terms and organized clearly. You might ask a trusted individual without any experience in housing or related programs to review your material and provide feedback if anything needs clarification.



You can tailor your promotional strategies to be more accessible and make sure to choose options that work for your specific audiences. If you are promoting your program online, are there alternative ways to find the material if someone does not have a computer or internet? If you are distributing flyers, is the font size large enough for people of all ages to read? If you are inviting community members to a public meeting, are there options so people working various shifts would be able to attend? You could collaborate with your community partners here for advice on any challenges you might encounter with your chosen strategies and ways to address those.

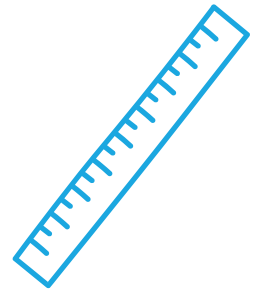
Here are some factors to consider while making your promotional plan:

- Font size and text spacing for written material
- Alternatives to digital materials and how they will be made available
- Language needs of your unique community and audiences
- Timing and location of in-person events and promotion
- Ease of asking questions or requesting accommodations

Measuring impact



How will you know if your outreach has been successful? When will you know if you need to change tactics to meet your overall program goal? Determining how you will measure your outreach impact will help you answer these questions. It is useful to decide your success metrics *before* you begin your local OOR program so that you can collect and track information throughout the entire process.



Return to your promotional strategies on page 7. For each strategy, how can you measure its effectiveness? Decide the measurements you will use and the best tool for the job. If you have already run an OOR program in the past, consider if there were data collection processes you would like to continue.

Here are some ideas to get you started:

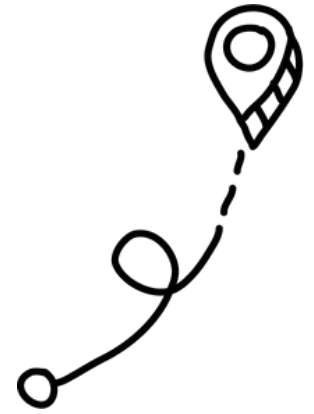
- When applicants contact you with questions, ask them how they heard about your program. Track responses in a uniform way between all program staff.
- If working with a referral partner, collaborate on how you will both track the number of referrals shared. Compare how many referrals turn into submitted applications.
- Add a question to your local OOR application asking how homeowners learned about the program.
- Examine social media metrics such as views, re-shares, and post engagements throughout the project period.
- Use sign-in sheets at all related events to track attendance.

Once you know what your indicators of success are and how you will track them to meet your program goals, create a timeline for your measurements. How often will you collect this information? At what points in your program will you review your collected measurements?

Establish a regular review so you can identify potential areas of growth or improvement for your outreach. It may be helpful to add one or two outreach evaluations to your project timeline so you have built-in opportunities to make sure you're on track to accomplish the outcomes listed in your OCRA grant application.

Looking ahead

Evaluating your outreach efforts will be especially helpful if you are doing more than one local application or bidding round. You can use the lessons learned from your first round of assistance to ensure you can recruit enough participants or qualified contractors for the next round. If you are planning to seek additional funding from OCRA to assist homes on your waitlist, this is also a good way to document the effectiveness of the work you've done for future grant applications. Consider different ways to organize and present the information you have gathered to tell the story of your program's success.



Here are some additional ideas to keep in mind as you think about the future of your local OOR program:

- Take advantage of your second public hearing to collect quotes, supportive stories, and critical feedback. For OCRA OOR grants, your second public hearing is required prior to closeout of the grant. This is an opportunity to learn from your stakeholders. Focus on what went well that can be shown off and celebrated, and what can be improved in the future.
- Connect with program participants to collect testimonials. Homeowners should always have the choice to provide their thoughts on the program or not, and no one knows the impacts of the program like they do! You can ask homeowners if they'd like to provide a testimonial about the program once their home rehab is complete. Giving homeowners the option to do so anonymously may help them feel more comfortable sharing their experience.
- Develop neighborhood champions! Homeowners who had a positive experience with the program may want to tell their friends and family about the opportunity. Participants might also get questions from their neighbors and have organic opportunities to spread the word about the OOR program and its benefits. If you have participants who are willing to champion your program to others, treat them like one of your "Promoter" stakeholders and make sure they have the right information to share with future participants.

