2022 - 2026

West Palm Beach Housing Authority Strategic Plan

Prepared by Meridian Point Consulting

West Palm Beach Housing Authority
Strategic Plan – 2022 – 2026

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Message from the Executive Director

I am pleased to present the 2022-2026 Strategic Plan of the West Palm Beach Housing Authority. This plan builds on the momentum of our inaugural strategic plan of 2016. It communicates our vision for the future and our goals, objectives, and strategies and reaffirms the WPBHA commitment to the community we serve.

This second strategic planning process began in late 2021. We retained the services of Meridian Point Consulting to help us guide the planning process with a structured, objective, and inclusive approach. Candid feedback was solicited from senior staff members, employees, commissioners, residents, HCV participants, and landlords. As a result, we now have a roadmap for improvement, change, and growth for the next five years as we strive to move the agency to higher levels of performance. Moreover, this roadmap will help us navigate the vast opportunities and inevitable challenges that lie ahead.

Our strategic plan includes bold goals and ambitious strategic initiatives. However, we have a solid operational infrastructure, talented and committed employees, strong community partners, and a history as a high performer – all of which position us for continued success.

We look forward to working with our employees, commissioners, community partners, and other key stakeholders to implement this strategic plan. And we eagerly anticipate celebrating with them the successes that will occur along the way.

Sincerely,

Linda Odum
Executive Director

Agency Overview

The **West Palm Beach Housing Authority [WPBHA]** was established by the City of West Palm Beach in 1938 pursuant to Florida Statute Section 421 and the enactment of the National Housing Act of 1937. The City formed the agency to provide safe, decent and affordable housing to families and individuals with limited financial resources.

The WPBHA is a multifaceted agency that plays multiple roles to serve families and individuals across West Palm Beach. Several of the critical roles are summarized below.

Asset Management Properties	The Asset Management Department manages **439 publicly assisted housing units**.
Enterprise Properties	The Enterprise Properties Department, managed by the **Housing Center of the Palm Beaches**, is the non-assisted property management arm of the agency. The Housing Center manages **652 unassisted housing units**.
Section 8 Housing Choice Voucher (HCV) Program	The Section 8 Housing Choice Voucher Program administers **4,054 housing choice vouchers**.
Housing Counseling Agency	The WPBHA is a HUD-approved Housing Counseling Agency.
Community Housing Development Organization (CHDO)	The WPBHA is a designated Community Housing Development Organization.
Family Self-Sufficiency (FSS) Program	The WPBHA manages a Family Self-Sufficiency Program that connects eligible families with the support services and resources needed to move the family toward economic self-sufficiency.
Pine Ridge Holistic Living Center	Pine Ridge Holistic Living Center, established in 2013, is an agency affiliate that stretches beyond housing and provides programs and services that improve the quality of life for residents.
Licensed General Contractor	The WPBHA is a licensed general contractor.
Baobab Development	Baobab Development, established in 2006, is the development division of the Housing Center of the Palm Beaches.
Risk Control Group	The Risk Control Group is the security arm of the WPBHA. It provides security services for all the developments. Moreover, the Risk Control Group provides security services for several external clients.

Development Profiles

The WPBHA owns and manages the following **Low Income Public Housing (LIPH)** program developments and **Rental Assistance Demonstration (RAD)** program developments.

Asset Management Properties

Development	# of Units	Program	Construction Year	
Pleasant City	74	RAD	1967	Scattered Site Development
Robinson Village	60	RAD	1986	
Robinson Villa	20	RAD	1986	
Sabal Palm Place	9	LIPH	2014	Townhome Development
Southridge	148	LIPH	1941	
Twin Lakes	128	RAD	1961	Includes 8 Scattered Sites

Enterprise Properties

The Enterprise Properties are managed by the **Housing Center of the Palm Beaches**. These properties are listed below.

Development	# of Units	Construction Year or Redevelopment Year	
Colony Oaks / Acacia Place	65	1985	
La'Joya Villages	55	2014	
MerryPlace	128	2007	
Newton Woods	60	1983	
Paul Laurence Dunbar	99	2017	Senior Apartment Complex
Royal Palm Place	125	2019	Senior Apartment Complex
Silver Palm Place	120	2018	

Board of Commissioners

The Board of Commissioners is made up of seven (7) individuals. These commissioners are dedicated to the agency's mission to provide safe, decent and affordable housing. These commissioners are appointed by the City of West Palm Beach.

Denise Smith-Barnes
Chairperson

Larry Brown
Vice Chairperson

Christopher Chase
Commissioner

Allen Gast
Commissioner

Malcolm Joy
Commissioner

Tanzanika Lillard
Commissioner

Yolanda Wilson
Commissioner

Elaine Johnson James, Esquire
Board Counsel

Senior Leadership Team

The West Palm Beach Housing Authority has 80 employees. The Housing Authority's senior leadership team is made up of diverse professionals who are committed to serving the agency's stakeholders. These leaders have the expertise and experience to carry out this commitment. Moreover, many of these leaders have decades of experience working in the agency.

Name	Title
Linda Odum	*Executive Director*
Truellaine Alexander	*Enterprise Regional Manager*
Charlotte Burnett	*General Counsel and Director of Development*
Teresa Gonzalez	*Director of Housing Choice Voucher (HCV) Program Administration*
Joel Hatcher	*Director of Construction Services*
Veronica Jenkins	*Director of Asset Management*
Dale Jones	*Director of Finance*
Leon Lipsick	*Director of Risk Control and Program Compliance*
Michael McManaman	*Director of Insurance and Contract Compliance*
Michael Odum	*Director of Community Relations*
Mercedes Rodas	*Director of Housing Financial Services*
Katy Smith	*Housing Management Analyst*

Strategic Planning Process

The strategic plan answers three (3) fundamental questions:
1. Where is the organization today?
2. Where does the organization want to be?
3. How do you intend to get there?

The WPBHA embarked upon an approach to strategic planning and strategy management involving:
- **Stakeholder Participation** – Commissioners, employees, residents, voucher holders, landlords and others were involved in identifying agency strengths, weaknesses, opportunities, threats and strategic priorities through surveys and interviews.
- **Strategy Implementation** – The success of implementing this strategic plan hinges on the collaboration, coordination and cooperation of the agency's employees, commissioners, community partners and vendors.
- **Strategy Management** – Managing strategy will be an ongoing activity that will take place across the agency.
- **Strategic Measurement** – The performance measures and performance targets included in this strategic plan will be reviewed throughout the life of the plan so that the agency can measure its performance and continuously improve its efforts.

This plan takes into account an analysis of the agency's past performance, marketplace trends, emerging issues and the challenges it faces in its constantly changing environment.

There are many deliverables for the strategic planning project. However, there are six (6) core deliverables:
1. Strategic Plan
2. Strategy Map
3. Strategy Snapshot
4. Strategy Scorecard
5. Mission-Vision-Values Posters
6. SWOT Analysis Results

The strategic plan includes multiple strategic initiatives that the agency will implement over the next five (5) years. To ensure the strategic plan is successfully implemented, it is important to segment it into more manageable components. Therefore, the WPBHA team members will create detailed work plans for each strategic initiative.

Strategic Planning Elements

The following chart illustrates the core elements of the strategic planning process.

Strategic Initiatives → **Strategic Goals** → **Strategic Objectives** → **Performance Measures** → **Performance Targets**

Strategic Planning and Strategy Management Cycle

The chart below illustrates the key elements in the strategic planning and strategy management cycle.

ASSESS
Internal Organization
External Environment
Stakeholder Surveys & Interviews
Best Practices Research
Background Research

FORMULATE
Mission, Vision & Values
Strategic Goals & Objectives
Performance Measures & Targets
Strategic Initiatives

REVIEW & ADJUST
Quality & Continuous Improvement

COMMUNICATE
Cascaded Strategic Plan
Communications Plan

MONITOR & REPORT
Performance Tracking
Performance Reporting
Strategy Review Meetings

IMPLEMENT
Work Plans
Initiative Management

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Information Gathering Methods

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The comprehensive strategic planning process was informed by the eight (8) methods listed below.

Method	
SWOT Analysis Survey	Meridian Point Consulting designed and administered online surveys to identify the agency's strengths, weaknesses, opportunities and threats. Commissioners, senior staff members and non-management employees were invited to anonymously complete the survey.
Resident Survey – Asset Management Properties	Meridian Point Consulting designed and administered a survey to gather residents' feedback about their resident experience and the agency's service and performance. All heads of household residing in an Asset Management Property were invited to anonymously complete the online survey or paper survey. Also, residents could complete an English or Spanish version of the survey.
Resident Survey – Enterprise Properties	Meridian Point Consulting designed and administered a survey to gather residents' feedback about their resident experience and the Housing Center of the Palm Beaches service and performance. All heads of household residing in an Enterprise Property were invited to anonymously complete the online survey or paper survey. Also, residents could complete an English or Spanish version of the survey.
Section 8 Housing Choice Voucher Holder Survey	Meridian Point Consulting designed and administered a survey to gather voucher holders' feedback about their voucher holder experience, the agency's service and performance and their landlord's performance. Meridian Point Consulting emailed voucher holders with an email address on file to invite them to anonymously complete the online survey.
Landlord Survey	Meridian Point Consulting designed and administered a survey to gather landlords' feedback about their landlord experience, the agency's service and performance and their landlord-tenant experience. Meridian Point Consulting emailed landlords with an email address on file to invite them to anonymously complete the online survey.
Commissioner Interviews	Meridian Point Consulting created an interview guide and conducted one-on-one interviews with commissioners to gather their insights and input about the agency.
Senior Staff Member Interviews	Meridian Point Consulting created an interview guide and conducted one-on-one interviews with senior staff members to gather their insights and input about the agency.
Desk Research – Internal and External	Meridian Point Consulting gathered and reviewed internal documents provided by the West Palm Beach Housing Authority. Moreover, the firm researched strategic initiatives of other public housing authorities across the United States.

Mission, Vision and Values Statements

Mission Statement

To provide safe, decent, and affordable housing to persons and families with limited financial resources and to provide residents with access to programs that will assist them in making the transition to greater financial security

Vision Statement

To be the leading provider of affordable housing in Palm Beach County

Values and Values Statements

	Values	Values Statements
	Customers First	We treat all residents, participants and clients with professionalism, respect and dignity.
	Employee Care	We strive to create an environment where every employee is engaged and has an opportunity to make meaningful contributions to the success of the agency.
	Ethics & Integrity	We maintain the highest levels of integrity and ethical standards in all our actions.
	Diversity & Inclusion	We value diversity and are committed to cultivating and preserving a culture of equity and inclusion.
	Pursuit of Excellence	We relentlessly pursue excellence and continuous improvement in all that we do.
	Innovation	We challenge the status quo, embrace change and value and encourage creativity and innovation.
	Fiscal Responsibility	We practice sound and effective management of our fiscal resources and exercise the prudent stewardship of public funds.

Pillars of Excellence and Strategic Goals

A pillar of excellence is an area in which the agency must excel in order to be a high-performance organization that achieves its mission and reaches its goals. The nine (9) pillars of excellence and strategic goals listed below are interdependent. These pillars of excellence and strategic goals are not presented in priority order.

	Housing	Build and expand quality affordable housing
	Customer Service Excellence	Create exceptional customer experiences that exceed expectations and maximize satisfaction and retention
	Landlord Management	Create exceptional landlord experiences to improve performance, satisfaction and retention
	Revenue Generation	Establish and manage diverse methods to generate financial and other resources and effectively administer these resources to ensure sustainability
	Marketing, Branding & Communications	Increase awareness and visibility and enhance brand reputation
	Strategic Partnership Management	Establish and maintain strong alliances with diverse organizations to achieve common goals for mutual and community benefit
	Vendor & Supplier Management	Build, maintain and strengthen mutually-beneficial vendor and supplier relationships that drive organizational success
	Operations & Technology Management	Build and manage effective systems and efficient processes to support operational success
	Planning & Evaluation	Engage in smart planning to formulate strategies, conduct effective monitoring to inform decisions and administer rigorous evaluations to improve performance

	# Housing Pillar of Excellence
	Strategic Goal – Build and expand quality affordable housing

Introduction

The City of West Palm Beach is known for its "**superb climate, thriving arts and culture scene and charming historic neighborhoods**." This thriving city has experienced tremendous growth and prosperity. Unfortunately, many low-and-moderate income families have not benefited from this growth.

While the city has a bright future ahead, there are shrinking housing options available for families and individuals with lower incomes. With rental rates and home prices skyrocketing, the city is losing affordable housing. In a typical year, rents rise between 3% and 5% on a year-to-year basis. However, rental rates have climbed sharply across Palm Beach County. In fact, in 2021 rents in Palm Beach County climbed 37%. Also, there are 97,368 cost-burdened renter households in Palm Beach County. 52.7% of these renter households (51,282 renter households) are "severely" cost-burdened. Finally, in February 2022, the median sales price of a single-family home jumped by 19% year-over-year.

These soaring rates and prices are having devastating effects on renters and homebuyers across Palm Beach County. While the local affordable housing needs are gargantuan, the Housing Authority is playing its part to make a dent in this systemic problem. In fact, the agency has a track record of vigorously tackling these overwhelming challenges with innovative solutions.

Strategic Goal

Build and expand quality affordable housing

Strategic Initiatives, Objectives and Performance Measures

Strategic Initiative	Strategic Objective	Performance Measure
Land Acquisition, Development & Redevelopment Projects	Build homes for low-to-moderate income renters and homebuyers	• # of Rental Units Rebuilt • # of New Rental Units Built • # of Homes Built
Property Acquisition & Rehabilitation Projects	Acquire and rehabilitate multifamily properties to expand affordable rental housing opportunities	• # of Housing Units Acquired
Housing Choice Voucher Program	Pursue additional allocations of housing choice vouchers	• # of New Vouchers Awarded

	1.0 Land Acquisition, Development & Redevelopment Projects

There is a national housing affordability crisis. There is no place in the nation where this crisis is more severe than in Florida – particularly South Florida. Actually, housing affordability is and has been a serious problem in South Florida for years. However, rather than just "staying in its" traditional lanes of renting public housing units and administering housing choice vouchers, the Housing Authority decided to address this problem head-on. The agency became a developer and licensed general contractor so it could assume more critical roles to address the shortage of affordable housing.

Affordable housing developers confront lots of challenges – expensive land, labor and material costs, burdensome land use regulations, complicated subsidy programs and even neighborhood opposition. Because of these immense challenges, most housing authorities do not desire to undertake development projects and even fewer have the capacity to do so. Fortunately, the West Palm Beach Housing Authority has the desire, expertise and experience to do so.

To conceive, lead and develop these projects, in 2006 the Housing Authority created **Baobab Development**. Moreover, the agency registered as a **Licensed General Contractor**. Finally, the agency established **Development** and **Construction Services** departments. As a result, the Housing Authority is better positioned to build homes for low- to moderate-income renters and homebuyers.

To fulfill this more ambitious charge, the Housing Authority has and will continue to collaborate with public agencies, nonprofit organizations and for-profit companies. The Housing Authority and its collaborators are actively involved in all six (6) major development phases:
1) **Project Concept**
2) **Project Feasibility**
3) **Project Dealmaking**
4) **Construction**
5) **Lease-up/Occupancy**
6) **Ongoing Operations**

The Housing Authority has several principles that it follows to guide its development and redevelopment projects. Several of these principles include:
- Assess each project to determine its **feasibility** and **long-term viability**
- Forge and manage **partnerships** with **public agencies**, **nonprofit organizations** and **for-profit companies**
- Cultivate **community support** for projects
- Explore multiple **project financing** options
- Minimize **resident displacement**
- Develop **mixed-income communities** when appropriate
- Use **design** to foster **vibrant communities** and **resident safety**
- Build developments that are **visually appealing** and offer **comfort and convenience** to residents

1.1 Redevelopment Projects

While there are several types of redevelopment projects, the most common type is when an *existing complex or building is demolished so that a new one can be built at the same site*. However, a redevelopment project can also include when an existing complex or building is repurposed in order for the property to better align with market needs and trends.

A core component of the Housing Authority's development strategy is to **redevelop rental properties** that the agency owns. Creating more quality and affordable rental opportunities for residents is the primary benefit of this approach. However, there can also be secondary and tertiary benefits of a redevelopment project such as generating more rental revenue, stimulating more residential and commercial development, reducing crime, improving environmental conditions and creating jobs.

1.1A Past Redevelopment Projects

Dunbar Village was a 246-unit public housing community built in 1940. The Housing Authority demolished Dunbar Village. The agency made a $67 million investment on the 17-acre site to build four (4) new developments. These developments are listed in the table below.

Development	# of Units	Completion Year	
Paul Laurence	99	2017	Senior Complex
Royal Palm Place	125	2019	Senior Complex with a preference for Veterans
Sabal Palm	9	2014	Townhomes
Silver Palm Place	120	2018	Family Development

1.1B Future Redevelopment Projects

Several of the Housing Authority's **potential** redevelopment projects are listed below.

Development	# of Units	Original Construction Year	Potential Redevelopment Year	
Colony Oaks / Acacia Place	65	1985	To Be Determined	**Acquisition Year:** 2005
Southridge	148	1940	2024 and Beyond	

MerryPlace

Pleasant City is an area in West Palm Beach that has a rich history. It was established in 1905 and incorporated into the city limits in 1912. It was developed for African-American workers who were employed at local hotels and other businesses. The area was once a hub of African-American business. However, after years of prosperity, the area had a period of decline. The West Palm Beach Housing Authority conceived MerryPlace to reinvigorate the area.

A central aspect of this reinvigoration strategy is to provide affordable rental and homeownership opportunities for the workforce in West Palm Beach. Consequently, between 2002 and 2005, the Housing Authority assembled 14.67 acres of land in Pleasant City to complete several ambitious development projects. The Housing Authority has and continues to collaborate with a number of public agencies, nonprofits and companies to complete the development projects.

The multiphase MerryPlace project has three (3) core elements which include:
- **MerryPlace Apartments** – A 128-unit rental community completed in 2007
- **MerryPlace Gardens** – A *future* 63-unit rental community
- **MerryPlace Estates** – A 50-unit homeownership community with a mix of single-family homes and townhomes **(Under construction)**

1.2 New Construction Projects – Rental Units

Multifamily rental housing plays an essential role in communities across the nation. In fact, the National Multifamily Housing Council reports that 15% (20.6 million units) of the nation's housing stock is multifamily rental units.

Multifamily housing is the most efficient way to increase the supply of affordable housing in West Palm Beach. Therefore, a vital component of the Housing Authority's development strategy is to build multifamily rental units. At their core, the agency's multifamily development projects increase density, variety, efficiency and most importantly affordability.

1.2A Past Project

The Housing Authority's most recent new construction multifamily development project is listed in the table below.

Project	# of Units	Completion Year
MerryPlace Apartments	128	2007

1.2B Current Projects

While this approach primarily focuses on multifamily construction, the Housing Authority also considers other viable rental housing construction opportunities. For instance, the Housing Authority is partnering with Palm Beach County to build Prosperity Village Cottage Homes, a detached single-family home rental community in West Palm Beach.

Project	Key Partner	Units	Completion Year
Prosperity Village Cottage Homes	Palm Beach County	17 Detached Single-Family Cottage Homes (Rentals)	To Be Determined

1.2C Future Projects

MerryPlace Gardens is one of the Housing Authority's future new construction multifamily development projects.

Project	# of Units	Completion Year
MerryPlace Gardens	63	To Be Determined

1.3 New Construction Projects – Homeownership

There is an acute shortage of **workforce housing** in West Palm Beach. As a result, homeownership has just become out of reach for many. Therefore, the Housing Authority has committed to building homes to make homeownership more accessible to lower-income families.

There are a number of qualification requirements for homebuyers. Several of the qualification requirements include:

- A buyer must be the primary resident. No investors are allowed.
- A buyer can be a first-time homebuyer or previous homeowner.
- A buyer's income must fall between 60% to 120% of the Area Median Income (AMI)

The Housing Authority has and will continue to build homes across West Palm Beach. Two (2) of the projects are listed below.

Project	Key Partners	Units	Year
MerryPlace Estates	• Palm Beach County Workforce Housing Program • PulteGroup	• 34 Townhomes • 2 Single-Family Homes	2021 and Beyond
MerryPlace Estates		• 14 Single-Family Homes	2021 and Beyond

	2.0 Property Acquisition & Rehabilitation Projects

Affordable housing seems to be an oxymoron in Palm Beach County. With housing construction costs climbing sharply, the affordable housing crisis is worsening. However, in some communities, an affordable housing strategy that can be more practical and more cost-effective than new construction is an **affordable housing acquisition strategy**.

A key element of the Housing Authority's affordable housing acquisition strategy is to find and acquire multifamily properties. While it is not a requirement, the agency particularly seeks existing use properties, underperforming properties, distressed properties and the like.

The Housing Authority has **acquired** multifamily developments **in the past**. Several of these developments are listed below.

Development	# of Units	Construction Date	Acquisition Date	Sell Date	
Royal Poinciana Place	144	1994	2013	2016	• Formerly Springbrook Commons • $3.3 Million Acquisition and Rehabilitation Loan • $7.8 Million Sales Price
La'Joya Villages	55	2014	2018		
Newton Woods	60	1983	2006		
Colony Oaks / Acacia Place	65	1985	2005		

The Housing Authority will continue to pursue a multifamily property acquisition strategy. There are multiple major phases of this strategy. Several of these phases are listed below.

1. **Identification & Research:** Identify and conduct extensive research for multifamily developments.
2. **Evaluation:** Evaluate and determine the developments which most align with the agency's acquisition criteria.
3. **Financing:** Secure financing for the acquisition.
4. **Acquisition:** Acquire a development.
5. **Rehabilitation & Upgrading:** Conduct moderate to substantial rehabilitation (e.g., new roofs, new flooring, remodeled kitchens and interior painting) of buildings and individual units.
6. **Rebranding:** Rebrand the development, if necessary, to reflect the fresh start provided by the new management and rehabilitation work.
7. **Rental:** Rent the units and effectively manage the property.

	3.0 Housing Choice Voucher Program	

The **Housing Choice Voucher (HCV) Program**, formerly the **Section 8 Program**, is the federal government program charged with assisting low-income families and individuals, the elderly and the disabled to afford decent, safe and sanitary housing. The Housing Authority receives federal funds from the U.S. Department of Housing and Urban Development (HUD) to administer its voucher program.

A family or individual that is issued a **housing voucher** is responsible for finding a suitable housing unit of the voucher holder's choice where the property owner agrees to rent under the HCV Program. A housing unit can be a single-family home, townhome or apartment. A housing unit is not limited to a unit located in a subsidized housing project. A **housing subsidy** is paid to the property owner or landlord directly by the Housing Authority on behalf of the voucher holder. The voucher holder then pays the difference between the actual rent charged by the property owner and the amount subsidized by the HCV Program.

3.1 Project-Based Voucher (PBV) Program

The Project-Based Voucher Program allows low-income families and individuals to live in **specific developments** with subsidized rents. Applicants must apply for a **specific development** and are then placed on that development's site-based waiting list managed by the Housing Authority.

Program		# of Vouchers Administered
Project-Based Voucher (PBV) Program		**667**

3.2 Tenant-Based Voucher Program

The Tenant-Based Voucher Program allows low-income families and individuals to reside in **privately-owned homes** of their choice, by subsidizing a portion of their rent.

Program		# of Vouchers Administered
Tenant-Based Voucher Program		**2,446**

3.2A Special Purpose Voucher Programs and Other HCV Initiatives

The special purpose vouchers are targeted to specific populations such as veterans, people with disabilities and families reunifying with their children.

Program		# of Vouchers Administered
HUD-Veterans Affairs Supportive Housing (HUD-VASH) Program	This program combines housing choice voucher rental assistance for **homeless veterans** with case management and clinical services provided by the **U.S. Department of Veterans Affairs (VA)**. The VA provides these services for veterans at VA medical centers and community-based outreach clinics.	**451**
Emergency Housing Voucher (EHV) Program	This program is designed to assist individuals and families who are **homeless**, **at-risk of homelessness**, fleeing, or attempting to flee, domestic violence, dating violence, sexual assault, stalking, or human trafficking, or were recently homeless or have a high risk of housing instability.	**107**
Mainstream Voucher Program | Non-Elderly Persons with Disabilities (NED) Voucher Program	This program assists individuals in two (2) categories. • **Category 1** vouchers enable non-elderly persons or families with disabilities to access affordable housing on the private market. • **Category 2** vouchers enable non-elderly persons with disabilities currently residing in nursing homes or other healthcare institutions to transition into the community. **Currently, the West Palm Beach Housing Authority has only been allocated Category 1 vouchers.**	**250**

Program		# of Vouchers Administered

Family Unification Program (FUP)	Under this program, housing choice vouchers are provided to two (2) different populations:
	1. Families for whom the lack of adequate housing is a primary factor in:
	    a. The imminent placement of the family's child or children in out-of-home care, or
	    b. The delay in the discharge of the child or children to the family from out-of-home care.
	2. For a period not to exceed 36 months, otherwise eligible youths who have attained at least 18 years and not more than 24 years of age and who have left foster care, or will leave foster care within 90 days, in accordance with a transition plan described in section 475(5)(H) of the Social Security Act, and is homeless or is at risk of becoming homeless at age 16 or older.
		133

The demand for affordable housing in Palm Beach County is much greater than the supply. In fact, the Housing Authority has thousands of families and individuals on its **Housing Choice Voucher Program waiting list**. The Housing Authority intends to seek additional vouchers through various programs to meet more of the housing needs in the West Palm Beach area.

	Customer Service Excellence Pillar of Excellence
	Strategic Goal – Create exceptional customer experiences that exceed expectations and maximize satisfaction and retention

Introduction

The public sector's customer satisfaction ratings are at an all-time low. Unfortunately, these low ratings perpetuate the longstanding and common complaints made by government customers and constituents about their poor service experiences. The bottom line is – most public agencies underperform as it relates to customer satisfaction.

While customer service in the public sector receives less attention than it does in the corporate sector, it is just as important – if not more so. A customer's expectation for courteous, speedy, helpful and accurate service does not change just because the organization is a public agency rather than a luxury department store or Michelin-starred restaurant.

The corporate sector is continuously evolving customer service standards. For instance, a customer can tweet a problem s/he is having with a company and receive a real time response or even give a 5-star rating for a service right in a company's mobile app. Many customers share these types of expectations of public agencies too. However, while many public agencies are aware of these expectations, few work to adopt and improve their customer service practices.

Strategic Goal

Create exceptional customer experiences that exceed expectations and maximize satisfaction and retention

Strategic Initiatives, Objectives and Performance Measures

Strategic Initiative	Strategic Objective	Performance Measure
Customer Experience Program	Create and implement a plan that captures strategies, standards, practices and policies to deliver high quality and consistent customer experiences	• Customer Experience Plan
Customer Service Training Program	Provide training, coaching and education to teach employees the skills and knowledge to deliver outstanding customer service	• # of Customer Service Training Sessions • Training Session Participation Rate

	1.0 Customer Experience Program

> **World-class customer service** is defined as the ability to consistently meet or exceed a customer's expectations.

Many public agencies struggle to deliver great customer service. The Housing Authority is committed to providing all its customers world-class customer service.

To greatly improve the Housing Authority's customer service, it is important to understand the difference between **customer service** and **customer experience**.

Customer service is generally a one-on-one human interaction with an employee serving a customer. In contrast, a **customer experience** goes beyond this and focuses on a customer's entire experience with an organization. Customer service is just one part of the holistic customer experience, while customer experience encompasses all the interactions between a customer and an organization.

To deliver outstanding customer experiences, an organization must clearly define who its customers are and design service experiences that meet their needs and exceed their expectations. Throughout this plan, the Housing Authority uses the term "customer" to include all the agency's **external stakeholders**. Several of the primary **customer or stakeholder groups** are listed below:

- Asset Management Property Residents
- Enterprise Property Residents
- Housing Choice Voucher Holders
- Family Self-Sufficiency Program Participants
- Landlords
- Community Partners

A **Customer Experience Program** is a systematic and holistic approach to improving the way an organization interacts with, serves and delivers value to its customers. It incorporates all experiences a customer has with the organization. Developing an effective customer experience program is the first step to creating **world-class customer experiences**.

The Housing Authority intends to develop a customer experience program – so when customers interact with employees, they feel their needs are considered, their issues are truly heard, they are treated with courtesy and respect and they will receive a solution that works for them.

1.1 Selected Customer Experience Program Elements

Element	
Needs & Expectations	The Housing Authority will seek to understand the needs and expectations of each of its stakeholder groups.
Vision	The Housing Authority will define a **customer experience vision** which is an aspirational statement on how the agency will service its customers.
Values & Culture	The Housing Authority has defined **customer-centric values** and will foster a **customer-centered culture.**
Policies	The Housing Authority will devise **customer-friendly policies**.
Manifesto	The Housing Authority will create a **customer service manifesto** as a declaration of the agency's **customer service creed**, **principles** and **intentions**.
Standards	The Housing Authority will create **customer service standards** (e.g., issue resolution time and voicemail response time).
Human Resource Management	**Recruitment & Hiring:** The Housing Authority will recruit and hire high-quality and customer-centric employees. **Training & Development:** The Housing Authority will provide ongoing customer service training and coaching to employees. **Rewards & Recognition:** The Housing Authority will reward and recognize employees that provide exemplary customer service.
Support Channels	The Housing Authority will build on and explore several **customer support channels**: **Face-to-Face** **Phone** **Email** **Social Media** **Live Chat** **Video Chat** **Mobile Messaging**
Self-service Channels	The Housing Authority will build on and explore several **customer self-service channels**: **Online Portal** **Online Community Forums**: A space for stakeholders to share problems and solutions with each other. **Knowledge Base and Frequently Asked Questions (FAQs)** **Chatbot**
Website Redesign	The Housing Authority will redesign its website to ensure it is content-rich and easy-to-navigate for all stakeholders.

	2.0 Customer Service Training Program

All organizations – corporate, nonprofit and public – should provide customer service training to their employees to arm them with the knowledge and skills they need to effectively handle a wide variety of customer issues. These customer issues might include **dealing with an angry customer**, **transferring calls to another department** or **delighting a repeat customer**.

The Housing Authority will establish a **Customer Service Training Program** to provide the knowledge and skills employees need to improve the interactions and service they provide to customers and thereby increase customer satisfaction. The Housing Authority may consider a variety of training methods such as:

- **Webinars**
- **Seminars**
- **Online Courses**

	Landlord Management Pillar of Excellence
	Strategic Goal – Create exceptional landlord experiences to improve performance, satisfaction and retention

Introduction

The West Palm Beach Housing Authority partners with landlords to provide safe, decent and affordable rental properties for voucher holders through the **Section 8 Housing Choice Voucher (HCV) Program**. The HCV landlords find tenants, screen tenants, maintain housing units, implement leases and interact with tenants throughout their tenancy. The landlord receives a portion of the rent from the voucher holder and the remaining portion through a **Housing Assistance Payment (HAP)** from the Housing Authority, which subsidizes the family's rent to make it affordable.

> **For the purposes of this plan, the term "landlord" includes rental property owners, rental property managers, rental property assistant managers and real estate brokers who are involved in rental housing.**

Strategic Goal

Create exceptional landlord experiences to improve performance, satisfaction and retention

Strategic Initiatives, Objectives and Performance Measures

Strategic Initiative	Strategic Objective	Performance Measure
Landlord Recruitment & Retention Program	Create and implement a plan to recruit and retain landlords to participate in the Housing Choice Voucher Program	• Landlord Recruitment & Retention Plan • # of Orientation Sessions
Landlord Training Program	Establish and manage a program to provide regular training to landlords to improve their property management practices and elevate their tenant rental experiences	• Landlord Training Plan • # of Landlord Training Sessions • # of Landlord Information Sessions

	1.0 Landlord Recruitment & Retention Program

While there are an array of benefits (e.g., consistent income and lower vacancy rates) for landlords to participate in the Housing Choice Voucher Program, there are a number of reasons that landlords refuse to accept housing vouchers. Several common reasons include:

- Lack of familiarity with the program
- Concerns about their program obligations
- Beliefs that voucher holders may be more challenging tenants

An effective landlord recruitment and retention program can help to address these and other concerns and dispel misconceptions about the program and voucher holders. The Housing Authority intends to employ an assortment of tactics to recruit new HCV landlords and retain current landlords.

Tactic	
New Landlord Orientation Session	The Housing Authority will make significant improvements to the New Landlord Orientation Session. The comprehensive sessions will cover the nuts and bolts of the HCV program so landlords understand the overall process and have a clear expectation of what landlords, tenants and the Housing Authority can and cannot do. Selected orientation topics might include: - West Palm Beach Housing Authority Overview - U.S. Department of Housing & Urban Development Overview - Housing Choice Voucher Program Overview - Program Benefits for Landlords - Landlord Roles and Responsibilities - Request for Tenancy Approval and Specific Application Paperwork for Landlords - Tenant Screening - Housing Assistance Payments (HAP) Contract Overview - Housing Inspections
Landlord Information Sessions	The Housing Authority will plan, market and host regular information sessions to interest landlords in participating in the Housing Choice Voucher program. Some of the session topics will include program details and program participation benefits such as guaranteed rent payments, free property advertising and free annual inspections. In order to maximize landlord participation, the agency will collaborate with other organizations to market and host the sessions. Potential collaborators might include local nonprofit organizations, municipal and county departments and others.

Tactic	
Mix & Mingle Events	The Housing Authority can plan, market and host Mix & Mingle events that provide networking opportunities for landlords. These events can target current HCV landlords and non-HCV landlords. The events can boost awareness about the program among non-HCV landlords while also providing networking opportunities for others.
Landlord Appreciation Event	The Housing Authority can plan, market and host an annual social event to demonstrate appreciation to landlords. The core event elements might include **landlord recognitions**, **landlord awards**, **guest speakers**, **landlord success stories**, refreshments and door prizes.

	2.0 Landlord Training Program

The Housing Authority will offer **in-person and online training sessions** to educate and inform landlords. The training sessions can include **seminars**, **webinars** and **lunch & learn sessions**. Also, the training sessions can be delivered in a mix of modes such as formal presentation, facilitated discussion and Q&A.

The Housing Authority will conduct a brief **annual survey** to determine the training topics that interest landlords. The Housing Authority will use outside experts and in-house team members to present sessions on the priority topics. Some of the **training topics** might include:

- Housing Choice Voucher Program Landlord Responsibilities
- Landlord Resources
- Common Landlord-Tenant Issues
- Vacancy Advertising
- Rental Application Process
- Tenant Screening and Selection Process
- Rent Reasonableness Determination
- Security Deposits
- Housing Quality Standards (HQS) Inspection Process
- Lease Enforcement and Evictions
- Fair Housing Laws and Practices
- Common Code Enforcement Problems
- Crime Prevention
- Nuisance Abatement Process

	Revenue Generation Pillar of Excellence
	Strategic Goal – Establish and manage diverse methods to generate financial and other resources and effectively administer these resources to ensure sustainability

Strategic Goal

Establish and manage diverse methods to generate financial and other resources and effectively administer these resources to ensure sustainability

Strategic Initiatives, Objectives and Performance Measures

Strategic Initiative	Strategic Objective	Performance Measure
Revenue Growth Strategy	Create a roadmap that details diverse revenue streams and methods to maximize them	• Revenue Growth Plan
Grants Program	Generate significant revenue through rigorous prospect identification and research, customized grant proposals and effective grants management	• # of Grant Proposals Submitted • % of Grant Proposals Funded
Business Opportunity Exploration Initiative	Identify and explore revenue-generating opportunities that align with the agency's mission	• Business Opportunity Exploration Sessions

	1.0 Revenue Growth Strategy

Revenue is the lifeblood of any organization. Without it an organization is unable to fulfill its mission. High performance organizations typically pursue **diverse revenue streams** to strengthen their financial performance, so they are better positioned to fulfill their mission. Several types of revenue streams include service revenue, transactional revenue, recurring revenue, project revenue and the like.

Some of the benefits of **revenue diversification** can include more revenue, greater financial stability, reduced risks and increased flexibility. However, it can be disadvantageous to have too many revenue streams if their pursuit leads to mission creep. As a result, an organization can experience poorer performance, greater risks and vulnerabilities or even reputational damage. Instead, an organization must be strategic and understand that not all revenue streams are appropriate for all organizations. Therefore, the Housing Authority will decide which revenue streams are the most appropriate for the agency to pursue today and in the future. These strategic decisions must be captured in a plan.

Great planning helps organizations cultivate revenue streams, prepare for the future and increase sustainability. There are several types of plans that an organization can create to guide the implementation of its revenue strategies – **revenue growth plan, revenue generation plan**, **revenue strategy**, **financial sustainability plan**, **strategic fundraising plan**, etc. While there are similarities and differences between these terms, this strategic plan uses them interchangeably.

The Housing Authority has diverse revenue streams. Several of the revenue streams include federal funds, rental revenue, grant revenue, fee income, etc. The agency will create a **Revenue Growth Plan** as a roadmap to guide its revenue-generating activities. Several of the core elements of the plan can include:

- Feasibility Analysis
- Goals and Objectives
- Individual Revenue Stream Descriptions
- Revenue Stream Management
- Action Plans and Timelines
- Budgets

Another key element of the plan will be **sustainability**. While some organizations narrowly define sustainability as the act of reducing dependence on a limited number of revenue streams, the Housing Authority considers a broader definition. In fact, the Housing Authority considers a wider variety of factors that support sustainability such as:

- Ensuring sound administrative and financial management
- Ensuring adequate and proper funding, staffing and strategic alliances
- Conducting succession planning to prepare for potential leadership transitions
- Monitoring relevant external events and responding appropriately

1.1 Key Principles

Several principles that the Housing Authority follows as it defines, plans, implements and evaluates its revenue streams are listed below.

	Principle	
1	Mission and Core Competency Alignment	The Housing Authority will ensure all revenue streams align with the agency's mission and core competencies.
2	Feasibility Analysis	The Housing Authority will analysis the feasibility of each revenue stream.
3	Revenue Stream Diversification	The Housing Authority seeks to establish diverse and stable HUD and non-HUD revenue streams to sustain the agency.
4	Recurring and Predictable Revenue Streams	The Housing Authority will explore recurring and predictable revenue streams.
5	Leadership Support	The Housing Authority gets buy-in from its leaders, so they assume greater ownership of the revenue streams.
6	Staff and Resource Support	The Housing Authority ensures the appropriate staff and resource support are in place to maximize each revenue stream.
7	Internal Organizational Capacity	The Housing Authority will build its internal organizational capacity and stronger internal systems to maximize each revenue stream.
8	Strategic Partnerships	The Housing Authority partners with public agencies, nonprofit organizations and for-profit companies to maximize revenue and support sustainability.
9	Continuous Evaluation	The Housing Authority will continuously evaluate each revenue stream to ensure optimal performance.

	2.0 Grants Program

Foundations, corporations and federal, state and local governments award billions of dollars annually to nonprofits, governments and even businesses. Nevertheless, it's difficult to win grants in a competitive marketplace so grantseekers must know how to interpret grantmakers' funding priorities, address grantmakers' funding requirements and craft winning proposals.

Grants are a source of revenue for the Housing Authority. The agency has an informal grants program in place. The Housing Authority will consider formalizing its grants program. The four (4) basic phases of a formal grants program include the following:

1. **Funding Prospect Identification & Research** – The agency identifies and researches potential grantmakers.
2. **Funding Prospect Relationship Cultivation** – The agency cultivates relationships with potential grantmakers.
3. **Grant Proposal Development** – The agency composes **master grant proposals** and prepares customized proposals for each grant opportunity.
4. **Grants Management** – The agency fulfills the grant requirements, maintains records and prepares and submits appropriate reports.

	3.0 Business Opportunity Exploration Initiative

A **social enterprise** is an organization – generally nonprofit or for-profit company – that launches and manages ventures that employ business strategies to deliver financial and societal benefits. There are countless examples of social enterprises such as:

- **Girl Scouts of the USA:** The nonprofit sells 200 million boxes of cookies every year while also providing leadership and entrepreneurship skills to girls.
- **The Lord's Place (West Palm Beach):** The nonprofit the Lord's Place Joshua Catering Social Enterprise creates jobs and training opportunities for individuals with significant barriers to employment. Moreover, the organization uses these revenues to fund its mission work to serve the homeless.

While social enterprises are not as common for public agencies – even less common for public housing authorities – they do exist. Just a few examples are:

- **Grand Forks Housing Authority (North Dakota):** The Grand Forks Housing Authority (GFHA) manages a social enterprise, GFHA Pest Elimination Division. The division provides pest prevention and elimination services and pest education sessions for its residents. The agency intends to market its inspection and treatment services to private landlords.
- **Chaffee Housing Authority (Colorado)** – The Chaffee Housing Authority, in collaboration with the Chaffee County Community Foundation, leads the Jane's Place project. The project will provide 17 rental housing units, a nonprofit incubator meeting space and a social enterprise coffee shop.

A **fee-for-service model** allows an organization to generate revenue by requiring payment for products sold and services rendered. Currently, the West Palm Beach Housing Authority has one (1) service that it offers to clients for a fee:

- **Risk Control Group:** The Housing Authority's Risk Control Group provides security services for several local places of worship (e.g., churches and temples) and other organizations. As the service grows, the agency can consider other clients such as property management companies, landlords, homeowner associations (HOAs) and others.

The Housing Authority's leadership will explore additional fee-for-service opportunities to generate additional revenue. The agency will leverage its expertise and experience to offer services to other organizations. Several **potential services** include:

- **Affordable Housing Advisory Services:** The Housing Authority can provide advisory services to current and aspiring affordable housing organizations and developers.

Marketing, Branding & Communications Pillar of Excellence

Strategic Goal – Increase awareness and visibility and enhance brand reputation

Introduction

The American Marketing Association defines marketing as **"the activity, set of institutions, and processes for creating, communicating, delivering and exchanging offerings that have value for customers, clients, partners and society at large."** This expansive definition captures the fundamental elements of marketing whether it be for a for-profit company, nonprofit organization or public agency. For all three (3) types of entities, marketing is an essential function that should be mastered in order to be a high-performance organization.

Regrettably, many public agencies place minimal emphasis on **strategic marketing**. Understandably, so many are focused on mission rather than marketing. However, the two (2) concepts are not mutually exclusive. In fact, effectively marketing a public agency and its programs and services can advance an agency's mission. More specifically, effective marketing can assist a public agency to:

- Attract stakeholders
- Inform, educate and engage its stakeholders
- Increase grants and other revenue sources
- Raise awareness about critical policies and issues
- Position the agency as an employer of choice

High-performance agencies generally deliver their marketing messages through multiple channels such as **print advertising**, **radio advertising**, **direct marketing**, **promotions**, **social media** and **public relations**. It is important to use these channels to devise and deliver impactful, consistent and cost-effective messages that align with the agency's brand image.

Strategic Goal

Increase awareness and visibility and enhance brand reputation

Strategic Initiatives, Objectives and Performance Measures

Strategic Initiative	Strategic Objective	Performance Measure
Marketing & Branding Program	Craft a plan and build and manage a program that incorporates diverse marketing strategies and tactics to increase exposure and awareness	• Marketing & Branding Plan • Improved Perceptions of Agency
Public Relations Program	Protect the organization's reputation, enhance its stature and present a favorable public image	• Public Relations Plan • Media Kit • # of Unique and Positive News Stories • # of Speaking Engagements
Marketing & Communications Collateral	Produce marketing collateral to promote the organization and its programs, services and events	• # of Documented Success Stories • Published Annual Report
Employee Brand Ambassador Program	Train and support employees to serve as brand ambassadors that promote a positive community presence	• Employee Brand Ambassador Program Guidelines
External Communications Program	Develop and implement a plan that incorporates strategies to inform, communicate and connect with external stakeholders	• External Communications Plan
Newsletter Management	Publish informative, educational, inspiring and engaging newsletters	• # of Issues Published • # of Subscribers • Subscriber Open Rate
Website Redesign	Redesign and manage an engaging, content-rich and multifunctional website	• Redesigned Website • # of Unique Website Visitors • # of Monthly Website Visits

Strategic Initiative	Strategic Objective	Performance Measure
Social Media Program	Utilize social media to inform, promote programs, services, events and activities and communicate with stakeholders	• Social Media Plan • # of Facebook Followers • # of Weekly Facebook Posts • # of Twitter Followers • # of Weekly Tweets • # of Instagram Followers • # of Weekly Instagram Posts

	1.0 Marketing & Branding Program

Public agencies are facing ever greater challenges in the marketplace. In fact, more public agencies today are competing in the same crowded marketplace for clients, employees, board members, collaborators, grants, media coverage, etc. For this reason, public agencies must find ways to effectively differentiate themselves and grab attention through stellar marketing campaigns.

The Housing Authority's marketing activities have been limited. However, as the agency's mission has expanded, more strategic and consistent marketing activities must be employed in order to move the agency to the next levels of success.

The Housing Authority will craft a comprehensive plan and build a program to guide its marketing activities. The marketing plan and program will incorporate a variety of approaches to boost visibility and awareness of the agency and its programs, services and events. Some of the Housing Authority's marketing activities may include advertising, online marketing, event marketing and the like.

	2.0 Public Relations Program

A key to the success of a marketing and communications strategy is the blend of effective public relations with effective media relations. The Public Relations Society of America defines public relations as **"a strategic communication process that builds mutually beneficial relationships between organizations and their publics."** In this sense, "publics" refers to any type of stakeholder – *actual* and *potential* customers, investors, funders, donors, employees, volunteers, strategic partners, community members, etc.

Public relations encompasses anyone who interacts with or is impacted by an organization on any level. In contrast, media relations is an aspect of public relations. Media relations focuses solely on the relationship between an organization and the media. More specifically, **media relations** encompasses an organization's interactions with a very specific audience – *individuals who comprise the news media and press*. These individuals can be editors and reporters at print and online media outlets or producers and hosts from television and radio stations.

The Housing Authority intends to create a **Public Relations Plan** and manage a program to implement the plan. The program will include elements such as those summarized in the table below.

Element	Summary
Media Relations Plan	The Housing Authority will prepare and implement a Media Relations Plan to generate earned media coverage for the agency.
Media Kit	A **media kit**, often referred to as a **press kit**, is a package of promotional materials distributed to members of the media to brief them about an organization, program, cause or person. The Housing Authority will produce a media kit.
Media List	The Housing Authority will build and maintain a comprehensive media list. The media list will document key media contacts who might be interested in stories about the agency and/or its programs, services, events, residents and clients. The media contacts may include journalists, reporters, bloggers, producers, freelance writers and editors across print, online, television and radio.
Press Releases	The Housing Authority will compose and distribute *press releases* (often referred to as *news releases* or *media releases*) about newsworthy activities to pique the interest of the media. Potential newsworthy activities might include new developments, property acquisitions, new program launches, major events, awards received, grants awarded, etc.
Speaking Opportunities List	The Housing Authority will identify potential speaking opportunities; maintain a list of these opportunities; and strategically pursue the best opportunities.

	3.0 Marketing & Communications Collateral

In today's rapidly changing digital age more and more marketing occurs online. In fact, the rise of digital advertising and social media marketing have taken center stage in the marketing arena. However, more traditional print methods can still be effective if they produce high-quality marketing and communications materials.

Marketing and communications collateral is material used to communicate an agency's brand image or promote its programs, services or events. This includes everything from print materials like posters and flyers to digital content like corporate videos.

The Housing Authority will create and regularly update marketing and communications collateral to promote the agency and its programs, services and events to key stakeholders – *residents, housing choice voucher holders, clients, landlords, community partners, etc*. Some of the key collateral are listed in the table below.

Collateral	
Information Sheets	The information sheets can highlight the agency and its programs, services and events.
Fact Sheets	A fact sheet is a 1-page or 2-page document that provides basic information on a specific topic in an easy-to-read format.
Corporate Video	The Housing Authority will consider producing a corporate video to promote the agency and its programs, services and events.
Slideshow Presentations	The Housing Authority will produce a branded slideshow template to use for a variety of presentations.
Posters and Flyers	The Housing Authority designs, prints and posts and distributes posters and flyers.
Success Stories, Testimonials and Case Studies	The Housing Authority will publish resident, voucher holder, client, landlord and other success stories, testimonials and case studies.
Annual Report	The Housing Authority will publish a visually-appealing annual report to showcase the agency's performance and accomplishments, financial highlights, success stories, etc.

	4.0 Employee Brand Ambassador Program

A **brand ambassador** or **brand advocate** promotes a brand and its products and services to his/her network. For most organizations, satisfied customers are the best brand ambassadors. These brand ambassadors generally promote a brand through their social media platforms. Brand ambassadorship is often perceived to be exclusively a corporate sector strategy for a company's best customers. To the contrary, brand ambassadorship can be a public sector strategy. Moreover, employees can be great brand ambassadors too.

Just as satisfied customers are the best brand ambassadors for a company, **satisfied stakeholders** (e.g., **residents**, **voucher holders**, **landlords** and **community partners**) are the best brand ambassadors for a public housing authority. Nevertheless, the Housing Authority will launch its brand ambassador strategy with employees as the agency's initial brand ambassadors.

The Housing Authority will build and manage an **Employee Brand Ambassador Program** that strives to increase the agency's brand awareness and shape public perception about the agency. Employees will accomplish this by sharing messages, photos and videos on social media about their work and the agency. However, in order for the Housing Authority's employees to be effective brand ambassadors, the agency must ensure its **employees are highly engaged and satisfied**.

The Housing Authority will perform various activities to empower and prepare employees to be effective brand ambassadors. Several activities will include:
- Measure **employee engagement** and **employee satisfaction**
- Devise and implement tactics to increase **employee engagement** and **employee satisfaction**
- Demonstrate to employees that they are **appreciated** and **valued contributors** to the agency
- Ensure employees understand the **agency brand**
- Keep employees informed about **agency news** and **initiatives**
- **Encourage** and **reward employees** for sharing their employee experiences and agency news
- Provide **basic training** and **guidance** for employees to be effective brand ambassadors
- Make it easy for employees to be brand ambassadors

	5.0 External Communications Program

External Communication is the transmission of information about an organization itself and/or its programs, services, events and activities to another entity or person in the organization's external environment. These entities and people often include *customers*, *strategic partners*, *vendors*, *investors*, *shareholders*, *society at large* and the like.

An **external channel of communication** is the way an organization transmits its messages. External communication channels include **face-to-face communication**, **print media communication** (e.g., newsletters and flyers) and **electronic communication** (e.g., email, website and social media).

The Housing Authority will create an external communications plan for each of its key external stakeholder groups.

Stakeholder Group	Selected Communication Methods
Housing Choice Voucher Holders	• Broadcast Email • e-Newsletter
Family Self-Sufficiency Program Participants	• Broadcast Email • e-Newsletter • Group Meetings
Landlords	• Broadcast Email • e-Newsletter • Landlord Portal • Information Sessions
Community Partners	• Broadcast Email • e-Newsletter

5.1 Resident Communications Plan

The Housing Authority intends to improve its existing methods and establish new methods to communicate with residents about updates, news and other information.

Category	Selected Communication Methods
Online and Digital Methods	• Website • Social Media Platforms • e-Newsletter • Broadcast Email • Broadcast Text
Print Methods	• Mailers • Newsletter
Live Methods	• Virtual Community Meetings (e.g., via Zoom) • In-Person Community Meetings

5.2 Landlord Communications Plan

The Housing Authority intends to improve its existing methods and establish new methods to communicate with and inform HCV landlords about updates, news and other information about the HCV Program. Several of these methods might include:

- **Landlord Portal** – The online portal can allow landlords to access rental payment details, rent change notifications, inspection and reinspection scheduling and status information, downloadable forms and the like.
- **Housing Authority Website**
- **Housing Authority Social Media Platforms**
- **e-Newsletter**
- **Bulk Email Marketing**
- **Bulk Text Messaging**
- **Mailers**

	6.0 Newsletter Management

Most individual's email inboxes are bursting with an abundance of unwanted emails. Therefore, it is important for publishers to standout to maximize their **e-Newsletter (and newsletter)** open rate. To do so, most successful e-Newsletter and newsletter publishers maintain an editorial calendar; ensure great design; prepare engaging, useful and shareable content; and publish on a consistent schedule.

The Housing Authority will publish e-Newsletters and newsletters that inform, educate, inspire and engage subscribers with valuable content so they actually read them. Several possible e-Newsletters and newsletters can be targeted to the following external stakeholder groups:

- **Residents**
- **Housing Choice Voucher Holders**
- **Family Self-Sufficiency Program Participants**
- **Landlords**
- **All Stakeholders** – *community partners, vendors, developers, etc.*

	## 7.0 Website Redesign

A website acts as a window to peer into a public agency. Moreover, a website can be an agency's most important asset to build and maintain its online presence. In fact, a stellar website can help an agency broaden its reach and better engage current and new stakeholders.

The Housing Authority intends to explore transforming its website into a more comprehensive, engaging, content-rich and multifunctional resource. The agency will ensure the website adheres to best practices so it will be more user friendly, easier to navigate and better designed. A redesigned website can have more compelling written content, impactful images and photos and captivating videos. The website content and functions will be geared to appeal to a wide variety of site visitors – actual and potential *residents*, *voucher holders*, *program participants*, *landlords*, *community partners*, *commissioners*, *employees* and other agency stakeholders.
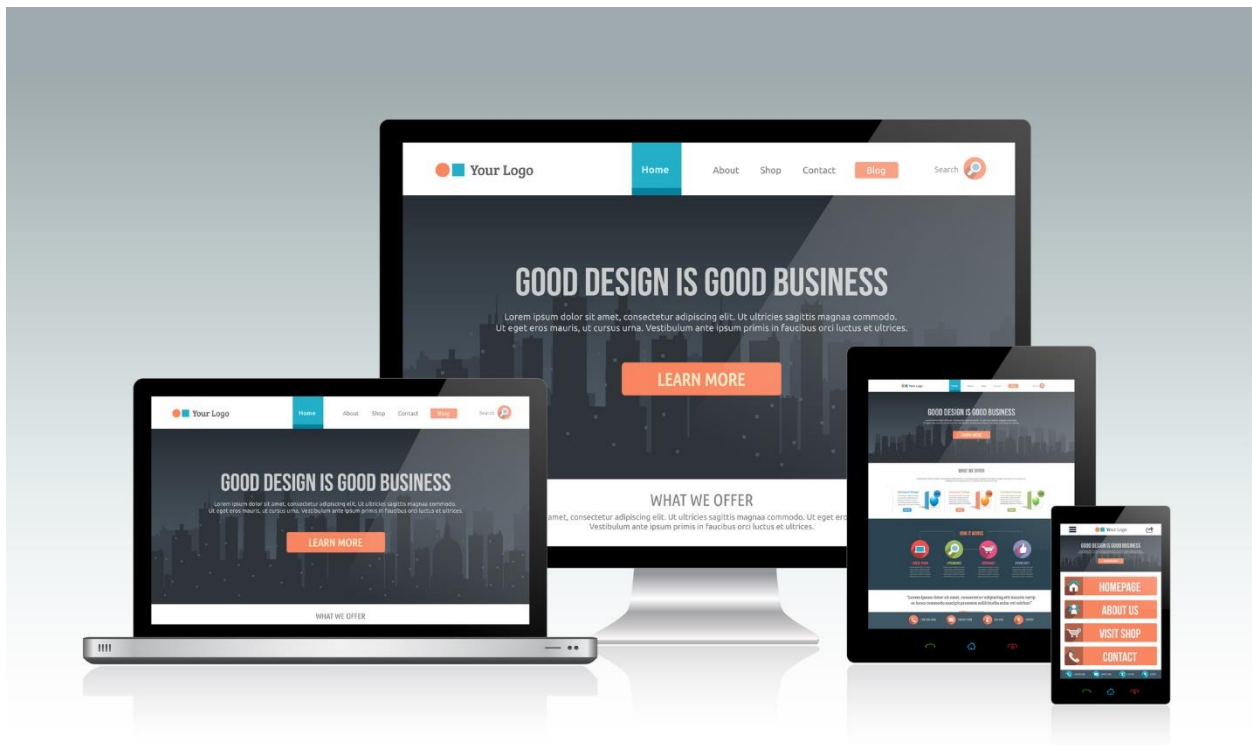
	8.0 Social Media Program

Many public agencies face two (2) overwhelming challenges – *underfunding and understaffing*. This reality can make any task beyond the most essential ones seem daunting. Consequently, social media is often lower on their priority lists. Yet, building and maintaining a robust social media presence is important for all public agencies. In fact, high-performance agencies generally integrate social media into their **marketing and communications toolkit** to:

- increase brand awareness
- promote programs, services and events
- share agency news and accomplishments
- attract and recruit employees and the like

However, if an agency intends to have a strong social media presence, it is critical to define a clear social media strategy and detail it in a Social Media Plan.

The Housing Authority intends to devise a **Social Media Plan** and build a stronger **Social Media Program** that focuses on informing, educating and engaging its followers. These followers are and/or will be *actual* and *potential* residents, voucher holders, program clients, landlords, community partners, commissioners, employees and other interested stakeholders.

Currently, the Housing Authority uses the following social media platforms – **Facebook**, **Instagram** and **Twitter**. Over time, the agency might explore other platforms to expand its online presence.

	Strategic Alliance Management Pillar of Excellence
	Strategic Goal – Establish and maintain strong alliances with diverse organizations to achieve common goals for mutual and community benefit

Introduction

A **strategic alliance** is a relationship between two or more organizations that enables each to achieve goals neither would be able to achieve separately. A strategic alliance allows both partners to still operate independently; share the benefits and control over the alliance; and continue to make contributions to the alliance until it ends.

There are diverse types of alliances ranging from simply sharing information to a corporate merger. Just a few examples of the types of alliances include outsourcing, cross-promotions, product licensing and joint ventures.

While there can be potential disadvantages to strategic alliances such as uneven control, unequal benefits and reputation damage, a well-structured alliance can offer an assortment of advantages. High-performance organizations form alliances and find a number of ways to realize these advantages. These advantages range from improving outreach to enhancing program and service delivery.

The Housing Authority recognizes the critical importance of strategic alliances to achieve its goals and objectives, so the agency partners with nonprofits, public agencies and businesses. There are three (3) types of alliances that the Housing Authority pursues and manages. These alliance types are:

1. **Collaborations** – The Housing Authority establishes and maintains ongoing collaborative relationships with its strategic partners.
2. **Affiliations** – The Housing Authority manages an array of loosely structured relationships with numerous organizations. These affiliations focus on information sharing, event coordination and the like.
3. **Vendor Relationships** – The Housing Authority contracts with companies and organizations and exercises oversight and authority over all contracted services.

Strategic Goal

Establish and maintain strong alliances with diverse organizations to achieve common goals for mutual and community benefit

Strategic Initiatives, Strategic Objectives and Performance Measures

Strategic Initiative	Strategic Objective	Performance Measure
Strategic Partnership Program	Collaborate with organizations to elevate success	• Partnership Plan Template • Partnership Inventory • Partner Satisfaction Survey

	1.0 Strategic Partnership Program

Strategic partnerships are vital to the Housing Authority's success. Yet, there is no formal program in place to manage its strategic partnerships. Consequently, the Housing Authority will develop and implement a **Strategic Partnership Program** to guide the identification, recruitment, cultivation, management and assessment of its strategic partnerships. The entire strategic partnership life cycle is displayed in the image below.

The Housing Authority pursues strategic partnerships for a number of reasons. Some of these reasons include:

- **Expand the Range of Services / Enhance Programmatic Impact** – The Housing Authority collaborates with other organizations that have complementary missions and goals to expand its services and enhance its impact.
- **Amplify Awareness** – The Housing Authority pursues strategic partnerships so it can increase the visibility of the agency and its programs, services, events and initiatives.
- **Increase Credibility** – By partnering with well-known and trusted organizations, the Housing Authority can improve the perceptions of the agency which can build credibility, trust and support.
- **Reduce Administrative and Programmatic Expenses** – The Housing Authority can partner with organizations to reduce and/or share administrative and programmatic expenses.

Strategic Partnership Life Cycle

Partnership Opportunity Identification

Partner Qualification

Partnership Transition, Renewal & Termination

Partnership Formation & Planning

Partnership Performance Evaluation

Partnership Implementation & Management

Partnership Negotiation & Agreement

Vendor & Supplier Management Pillar of Excellence

Strategic Goal – Build, maintain and strengthen mutually-beneficial vendor and supplier relationships that drive organizational success

Strategic Goal

Build, maintain and strengthen mutually-beneficial vendor and supplier relationships that drive organizational success

Strategic Initiatives, Strategic Objectives and Performance Measures

Strategic Initiative	Strategic Objective	Performance Measure
Vendor Management Program	Oversee the identification, qualification, selection, management and evaluation of vendors to maximize programmatic, operational and financial performance and minimize risk	• Vendor Satisfaction Survey
Supplier Diversity Program	Build relationships with and purchase goods and services from high-quality diverse suppliers	• Supplier Diversity Plan

	1.0 Vendor Management Program

A **vendor** is a business or individual that sells products or services to an organization. For some organizations, their vendors are so integrated into their operations that they can play a key role in organizational success or failure. In these cases, the vendors are transformed from a transactional relationship to a valuable partner. Therefore, it is important that an organization's procurement process yields high-quality and reliable vendors.

It is vital for the Housing Authority to effectively nurture and manage its vendor relationships. Having a great relationship with a vendor who has a vested interest in the success of the agency can prove to be beneficial. Some of the benefits the Housing Authority might realize are – *better contract management*, *improved vendor performance* and *increased return on financial investment*.

1.1 Vendor Lifecycle Management

Vendor Lifecycle Management is an important business discipline that incorporates the actions an organization takes to initiate and manage relationships with its vendors and suppliers. It is a comprehensive and structured approach to managing vendors that places them at the center of the procurement process. It features a set of seven (7) phases that cover all aspects of dealing with vendors throughout their lifecycle. These phases are segmented into three (3) stages.

Stage		Phase	Activity
(I) Pre-Contract Phase	1	**Procurement Needs Identification & Solicitation**	• The agency identifies its procurement need. • The agency prepares and releases a *request for proposal* (RFP), *request for quotation* (RFQ), *invitation to bid* (ITB), etc. to solicit vendors interested in fulfilling the specified need. • The agency shortlists several potential vendors based on the proposals, quotes or bids.
	2	**Vendor Qualification**	The agency qualifies the shortlisted vendors as it puts them through a due diligence process.
	3	**Vendor Evaluation & Selection**	The agency considers factors (e.g., **vendor capability**, **technical responsiveness** and **competitive value**) to evaluate and select a vendor for the contract award.
(II) Contract Phase	4	**Vendor Onboarding & Information Management**	The agency onboards the vendor and creates a robust vendor profile.
	5	**Vendor Performance Management**	The agency monitors vendor performance and identifies and solves problems in a timely manner.
	6	**Vendor Relationship Management**	The agency handles all aspects of the vendor agreement and ensures all contractual obligations are met.
(III) Post-Contract Phase	7	**Vendor Offboarding**	The agency offboards the vendor.

	2.0 Supplier Diversity Program

Supplier diversity is a business strategy that drives the inclusion of diverse-owned businesses in the procurement of goods and services within an organization. A **Supplier Diversity Program,** similar to a **Minority-owned and Women-owned Business Enterprise (MWBE) Program,** is a proactive business program which encourages the use of minority-owned and women-owned businesses.

The Housing Authority intends to <u>explore</u> a strategy to increase contracts awarded to diverse vendors. Several tactics may include:

- **Vendor Recruitment:** The Housing Authority can recruit more diverse companies to register as vendors.
- **Email and Website Solicitation Advertising:** The Housing Authority can advertise its solicitations to diverse vendors through an email distribution list and advertise them on the agency website.
- **Procurement Policy:** The Housing Authority can review its procurement policy to ensure it fosters greater participation by diverse vendors.
- **Supplier Diversity Events:** The Housing Authority can attend supplier diversity events to connect with more diverse vendors.
- **Outreach Events:** The Housing Authority can host outreach events to assist diverse vendors to navigate the intricacies of bidding and working with the agency.
- **Bidder's Conferences:** A bidder's conference is designed to provide interested and eligible vendors an opportunity to ask questions regarding a project. The Housing Authority can invite more diverse vendors to participate in its bidder's conferences.

Operations & Technology Management Pillar of Excellence

Strategic Goal – Build and manage effective systems and efficient processes to support operational success

Introduction

Operational excellence is a nebulous term that can be very difficult to define. However, in essence, the Housing Authority defines operational excellence as *executing in an efficient and effective manner across all business functions with a focus on delivering value to its stakeholders*.

Operational excellence enables an organization to continuously improve in all areas of performance, including strategic planning, human resources, customer service, marketing, technology management, strategic alliances, etc. Operationally-excellent organizations possess the leadership, human and other resources, administrative infrastructure, processes and management practices to propel them to achieve greater operational efficiency and effectiveness.

The Housing Authority will focus on building a model of operational excellence that aligns with its strategic priorities. This operational excellence involves making **continuous improvements** to the agency in order to achieve a strategic advantage. In doing so, the Housing Authority will maximize value for its employees, commissioners, community partners and most importantly the residents, voucher holders and program participants the agency serves.

Strategic Goal

Build and manage effective systems and efficient processes to support operational success

Strategic Initiatives, Strategic Objectives and Performance Measures

Strategic Initiative	Strategic Objective	Performance Measure
Office Relocation Project	Identify, acquire, lease and/or build an attractive office space to maximize operational-efficiency and employee engagement, productivity and satisfaction	• Building Feasibility Study • Office Relocation Plan • Office Space Plan
Technology Needs Assessment	Assess the organization's hardware, software, online applications and other technologies	• Technology Needs Assessment
Cybersecurity Risk Assessment	Identify, analyze and evaluate cybersecurity risks and define methods to reduce vulnerabilities	• Cybersecurity Risk Assessment • Cybersecurity Plan
Strategic Technology Plan	Create and implement a plan that details hardware, software and other technologies to strengthen core and supporting business functions	• Strategic Technology Plan
Enterprise Risk Management & Business Continuity Management	Develop plans that identify and assess potential risks and methods to prevent, mitigate or control them	• Enterprise Risk Management Plan • Business Continuity Plan
Community Safety & Security Program	Improve safety and security in the developments	• Community Safety & Security Plan
Preventive Maintenance Program	Conduct regular and planned inspections of units, buildings, equipment and major systems to minimize deterioration, damage and breakdowns, extend longevity and reduce repair costs	• Preventive Maintenance Plans

	1.0 Office Relocation Project

A **workplace** is a location where employees perform jobs and tasks for their employer. A workplace plays a vital role in influencing **employees' productivity**, **engagement** and **satisfaction**. Moreover, a workplace can have a significant impact on an organization's **corporate culture**. However, despite these facts, many organizations overlook the importance a workplace has on an organization's success.

"Location, location, location" is a cliché real estate phrase. While it is cliché, it still has significance for real estate location decisions because selecting the right location can help propel an organization to new heights while the wrong location can doom it to mediocrity or even failure.

The Housing Authority intends to identify and relocate to a new office space, while striving to experience minimal disruptions during the move. Moving offices will be a challenging endeavor; however, the Housing Authority will take steps to keep the agency running as efficiently as possible. To ensure a smooth transition, the agency will thoroughly plan and prepare for the move. As a result, the Housing Authority will create an **Office Relocation Plan** that details each step in the relocation process. Some of the plan's key elements may include:

- Assemble a **project planning team**.
- Detail all **action steps**.
- Create a **relocation budget**.
- Define the **office space requirements**.
- Identify and assess potential office spaces.
- Determine the **moving methods**.
- Plan the new office space, furniture layouts, etc.
- Communicate the move to key stakeholders.
- Update marketing materials to reflect the new information.

While **relocating to and renovating a new office space** is a viable option, the Housing Authority's leadership is also considering **constructing a new office building**. In addition, the Housing Authority will prepare an **Office Space Plan** to define how the agency will best utilize the space to create a **strong workplace culture** and **maximize employee productivity**.

	2.0 Technology Needs Assessment

The Housing Authority is a growing and continuously evolving organization. Every day brings new growth opportunities. While growth can be exciting, it comes with challenges. Employing the right technologies is essential to help overcome or prevent challenges and accelerate – or minimally sustain – the growth. Therefore, it is necessary for the Housing Authority to conduct routine **Technology Needs Assessments**.

A technology needs assessment is a systematic review of an organization's **current** and **future** technology needs, based on the organization's existing technologies and growth plans. The Housing Authority's technology needs assessment will yield many benefits such as:

- Provide a snapshot of the agency's **current technology landscape**
- Highlight **gaps** in the agency's **technology infrastructure**, including aging and obsolete technologies
- Identify areas where technology hinders **employee productivity** and **operational performance**
- Provide adequate information to **craft a plan** for the purchase of new technologies

A few of the technology needs assessment's key steps are:

1. Analyze each department to understand its workflows to identify gaps, inefficiencies, bottlenecks and recurring problems.
2. Conduct an **inventory** and evaluate the **strengths and weaknesses** of the current technologies.
3. Make **technology recommendations** that align with the agency's plans.

	3.0 Cybersecurity Risk Assessment

Public agencies are constantly at risk of **cyberattacks** and various other threats. From **accessing personal constituent information** to **malware** and **ransomware attacks**, there are numerous ways hackers can take advantage of poorly protected IT systems.

Cybersecurity is the practice of protecting systems, networks and programs from cyberattacks. Generally, these cyberattacks are aimed at accessing, changing or destroying sensitive information; extorting money; or interrupting business operations.

Implementing **cybersecurity approaches** is even more challenging today because there are so many vulnerable devices, and hackers are even more inventive. An effective cybersecurity approach requires multiple layers of protection across the computers, networks, programs and data that an organization intends to keep safe. To establish and maintain an effective defense from cyberattacks, an organization must ensure the people, processes and technology all complement each other.

- **People** – The Housing Authority team members must understand and comply with basic data security protocols such as selecting strong passwords, cautiously reviewing email attachments and backing up data.
- **Processes** – The Housing Authority must have protocols for how it deals with attempted and successful cyberattacks. At a minimum, the protocols must define methods to identify attacks, protect systems, detect and respond to threats and recover from successful attacks.
- **Technology** – Technology is essential to providing the Housing Authority and its team members the computer security tools (e.g., firewalls, antivirus software and malware protection) needed to protect the agency from cyberattacks.

A **cybersecurity risk assessment** analyzes an organization's cybersecurity controls and its ability to remediate vulnerabilities. Regular assessments are a critical element of a holistic **Risk Management Program.** The Housing Authority will routinely perform **comprehensive cybersecurity risk assessments** because they are critical for determining whether the agency is properly prepared to defend against an array of threats. The primary goal of the assessments is to identify vulnerabilities and minimize gaps in security. Also, the assessments aim to keep the leadership well-informed about the agency's cybersecurity posture, so it can make better decisions about devising and implementing security strategies.

	4.0 Strategic Technology Plan

Technology has a tremendous impact on the operations of public agencies across the globe. In fact, technology has transformed the way public agencies serve their constituents, communicate with partners, manage information and the like. Moreover, with the growth of web and mobile computing, technology utilization has skyrocketed.

High-performance public agencies effectively manage technologies to increase their productivity, improve collaboration and communication, enhance marketing and so forth. **Technology management** is a critical business function that the Housing Authority seeks to master. As residents, clients, employees, commissioners and vendors become increasingly dependent on technology, the agency will seek to drive greater efficiency by utilizing new and improved technologies.

The Housing Authority will create a **Strategic Technology Plan** that details the agency's **current** and **future technology solutions**. The plan might incorporate elements such as:

- **Computer Hardware**
- **Computer Software** – *Microsoft Office 365, QuickBooks*
- **Web-based and Cloud-based Technologies**
- **Online Portals** – *Commissioners, Landlords, Residents*
- **Equipment** – *Photocopiers, Phone Systems, Mobile Devices*
- **Staff Training and Support**
- **Information Technology (IT) Contractors**
- **Technology Budget**

	5.0 Enterprise Risk Management & Business Continuity Management

5.1 Enterprise Risk Management

All organizations are exposed to risks. **Risk management** is how an organization handles those risks. It comprises **risk response planning** for a myriad of uncertain events, from natural disasters (e.g., hurricanes and floods) to cybersecurity threats.

Enterprise Risk Management (ERM) is a methodology that strategically views risk management from an agencywide perspective. Through ERM an organization seeks to identify, assess and prepare for potential losses, hazards and other potentials for harm that may interfere with an organization's operations. The primary types of risks include:

- A **hazard risk** is a risk that presents a high level of threat to life, health or property.
- A **financial risk** is a risk that directly relates to money such as financial consequences like a cost increase or revenue decline.
- A **strategic risk** is a risk that impacts or is created by a strategic business decision.
- An **operational risk** is a risk that materially affects an organization.

The Housing Authority will create an **Enterprise Risk Management Plan**. The plan will include five (5) **core elements**:

1. **Strategy Setting**: The agency understands its strategies and associated risks.
2. **Risk Identification**: The agency identifies the major risks that can negatively impact the agency's finances, operations or even reputation.
3. **Risk Analysis**: The agency analyzes the identified risks to determine their likelihood and severity and prioritizes them.
4. **Risk Response Strategy**: The agency considers various risk response strategies and selects the most appropriate one.
5. **Risk Monitoring**: The agency constantly monitors its risks to continually determine the significance they represent.

The agency's leadership selects one of five (5) **risk response strategies** to handle the identified risks:

- **Risk Avoidance**: The elimination of risks or activities that can negatively impact the agency.
- **Risk Reduction**: The mitigation or limitation of the severity of losses.
- **Alternative Actions**: The consideration of other possible ways to reduce risks.
- **Share or Insure**: The action of transferring risks to third parties (e.g., insurance agencies).
- **Risk Acceptance**: The acknowledgment of the identified risks and the willingness to accept their consequences.

5.2 Business Continuity Management

Business continuity refers to maintaining operations or quickly resuming them in the event of a major disruption. A disruption may be caused by a natural disaster (e.g., hurricane or flood), fire or even a cyberattack. A **Business Continuity Plan** outlines the procedures an organization will follow if it experiences a major disruption or crisis. By creating a continuity plan, an organization's leaders can react quickly and efficiently to disruptions.

The Housing Authority's business continuity plan will detail strategies to ensure business continuity following a disruption. With a well-prepared business continuity plan, the Housing Authority will be better equipped to serve its stakeholders during a crisis, limit agency downtime and protect and preserve the agency's operations.

Business continuity planning includes activities such as the following:
1. Identify the **goals**, **objectives** and **scope** of the plan.
2. Establish a **Business Continuity Management Team**.
3. Perform a **risk assessment** and **business impact analysis (BIA)**.
4. Identify **critical business functions**.
5. Create a **plan** for each critical business function to maintain operations.
6. **Train** staff members.
7. Test, revise and update the plan.

While they should be integrated, there are key differences between the **Enterprise Risk Management (ERM) approach** and **Business Continuity Management (BCM) approach**. The enterprise risk management approach is a more <u>preventive</u> and mostly <u>strategic</u> approach focused on understanding and planning for hypothetical situations. In contrast, the business continuity management approach is much more <u>tactical</u> – and it is more focused on the <u>actual way</u> that an organization should act when a business disruption occurs.

	6.0 Community Safety & Security Program

Community safety is about residents feeling safe, whether at home or in their community. A safe community is a place where people can live, work and play without fear or risk of harm or injury. Community safety, real or perceived, impacts the way residents feel and interact in their community.

The Housing Authority is committed to creating and sustaining safe developments for its residents. The agency employs a holistic and collaborative approach to prevent and reduce crime and disorder in its developments. Consequently, the agency strives to engage residents, property management, law enforcement, etc. in its efforts. The agency's community safety and security efforts are coordinated by the Risk Management Department. Several of the current and potential efforts are listed below.

Closed Circuit Television (CCTV) Security System	The Housing Authority monitors its CCTV security systems installed in its developments.
Law Enforcement Collaboration	The Housing Authority collaborates with the City of West Palm Beach Police Department to prevent crime and enhance community safety.
Security Patrols	The Housing Authority provides security patrols for its developments.
Neighborhood Watch	The Housing Authority believes a resident empowerment approach is an effective means to improve community safety. Therefore, the agency enlists residents to identify community problems, determine solutions and then collaborate with the Housing Authority, law enforcement and neighborhood organizations to make positive changes.
Community Safety & Security Protocols	The Housing Authority continuously assesses and improves safety and security protocols in its developments.
Crime Prevention through Environmental Design (CPTED)	CPTED is based on the premise that the physical environment influences criminal activities. The Housing Authority seeks to improve safety in its developments using CPTED principles such as lighting, fencing, shrubbery and security gates.
Community Forums	The Housing Authority can host community forums to talk to and engage with residents on issues such as policing, community safety and youth activities.

	7.0 Preventive Maintenance Program

The Housing Authority owns and manages several developments with relatively new rental housing units and others with upgraded rental housing units. However, the agency still has aging developments in its real estate portfolio. As a result, several of the developments have housing units that are suffering from deferred maintenance and a lack of capital investment. Therefore, the Housing Authority intends to continue repairing, preserving and upgrading its real estate portfolio.

Effective **property maintenance** keeps a property and its housing units in optimal condition through **reactive maintenance** activities (e.g., interior unit maintenance, common area maintenance, grounds maintenance and pest control). Property maintenance is not only a critical factor for **resident satisfaction** but also essential for the **financial performance** of a property and ultimately the agency.

Preventive maintenance, or **planned maintenance**, must be an important element of a comprehensive property maintenance strategy. Preventive maintenance includes activities based on regular, scheduled and methodical inspection of housing units, buildings, equipment and major systems. These inspections are designed to maintain Housing Authority properties in good repair and to appreciably extend their useful life by assuring repairs are made prior to deterioration and actual breakdown, thereby reducing both damage and repair and maintenance costs. Moreover, preventive maintenance can help increase resident and employee safety.

The Housing Authority's **Preventive Maintenance Program** focuses on the **major systems** that keep the developments operating. These systems include **heating and air conditioning**, **electrical**, **life safety**, **plumbing** and others.

The Housing Authority will **create** and **implement** detailed **Preventive Maintenance Plans** that are **customized** for each development. The plans will include content such as:
- Preventive Maintenance Activities
- Estimated Activity Duration
- Expected Activity Frequency and/or Schedule
- Activity Owners

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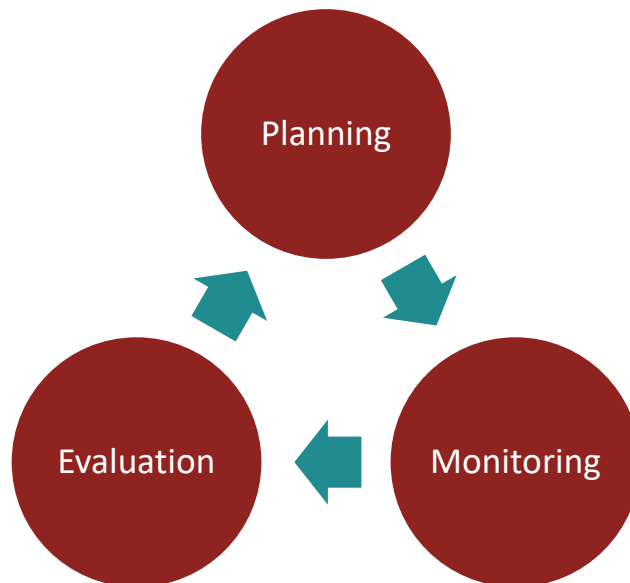|	Planning & Evaluation Pillar of Excellence	
	Strategic Goal – Engage in smart planning to formulate strategies, conduct effective monitoring to inform decision making and administer rigorous evaluations to improve performance	

Introduction

Planning, **monitoring** and **evaluation** are vital to all organizations. In fact, achieving and sustaining organizational success usually requires a level of competence for each of these interrelated functions.

- **Planning** – Planning focuses on creating a roadmap from the present to the future. To plan an appropriate path, an organization must know where it is today **(situation analysis)**, where it wants to go tomorrow **(goal setting)** and how it will get there **(strategies)**. Only then can plans be created to help reach the desired future.

- **Monitoring** – Monitoring is the systematic and routine process of collecting, analyzing and using information to track progress toward reaching goals. Monitoring usually focuses on processes, such as **when** and **where** activities occur, **who** delivers them and **how many** targets they reach.

- **Evaluation** – Evaluation enables an organization to assess how well it is doing and to learn from this to inform decision making. Moreover, evaluation enables an organization to judge whether it has achieved the outcomes it intended, contributed to changing the situation it desired to change and reached its goals.

Good planning, effective monitoring and rigorous evaluation play a significant role in improving the performance of an organization and its programs and services.

<div style="text-align:center">**Strategic Goal**</div>

Engage in smart planning to formulate strategies, conduct effective monitoring to inform decision making and administer rigorous evaluations to improve performance

<div style="text-align:center">**Strategic Initiatives, Strategic Objectives and Performance Measures**</div>

Strategic Initiative	Strategic Objective	Performance Measure
Strategy Management System	Establish and operate a system of continuous planning and strategy management	• # of Strategy Review Meetings • # of Strategy Huddles • Strategy Performance Report Template
Department Plans	Create plans to more effectively manage departments	• Department Plan Template
Program Plans & Toolkits	Create plans and tools to more effectively manage programs and services	• Program Plan Template
Stakeholder Survey Program	Establish and administer a program to survey stakeholders to better understand their needs, interests and expectations	• Stakeholder Satisfaction Surveys • Stakeholder Pulse Surveys • Stakeholder Touchpoint Surveys
Program Evaluation System	Build and implement a system to monitor and evaluate program and service performance	• Evaluation Plan Template

	1.0 Strategy Management System

In today's fast paced, ever-changing world, creating a strategic plan is more important than ever. However, rather than creating a static plan, organizations should institute an ongoing planning process. Thus, as external and/or internal factors change, it is easier for an organization to adjust its strategic priorities. With this ongoing planning process, the more fluid plan does not "gather dust" on the figurative shelf. Consequently, the organization's leadership can truly use the plan as a strategic guide.

A **strategy management system** consists of a **planning** and **management** cycle that enables an organization to achieve its strategy. The Housing Authority will develop a six (6)-phase system.

	Phase	
Planning	1. **External & Internal Scans**	Analyze the external environment, the internal organization and the current strategy
	2. **Strategy Formulation**	Develop the mission, vision and values statements and formulate the strategy
	3. **Strategy Translation**	Translate the strategy into strategic initiatives, objectives and activities
Management	4. **Strategy Implementation**	Implement the strategic initiatives
	5. **Strategy Monitoring**	Monitor the strategic initiative implementation
	6. **Strategy Adaptation**	Adapt the strategy or strategy implementation, as necessary

Several other elements of the Housing Authority strategy management system are summarized in the table below.

Operational Plans and Action Plans	The Housing Authority will prepare <u>annual</u> **Operational Plans** and **Action Plans**.
Strategy Review Meetings	The Housing Authority intends to conduct <u>quarterly</u> **Strategy Review Meetings.**
Strategy Huddles	The Housing Authority intends to hold <u>monthly</u> **Strategy Huddles** with the senior leadership team.
Strategy Performance Reports	The Housing Authority will produce <u>monthly</u>, <u>quarterly</u> and/or <u>annual</u> **Strategy Performance Reports** that capture the agency's performance measures, performance targets and performance results.

	2.0 Department Plans

A **department plan**, **department strategic plan** or **department business plan** is an important tool that allows an organization's department or division to document its strategic initiatives, projects and activities. It is vital that the content in a department plan aligns with the organization's overall strategic plan.

The Housing Authority will create a **department plan template** so each department can use it as a resource to create their __annual__ department plan. These department plans will serve as implementation guides for each department. The department plans can include content such as:
- Current Situation
- Goals and Objectives
- Strategic Initiatives, Projects and Activities
- Key Roles and Responsibilities
- Performance Measures and Performance Targets
- Action Plan and Timeline

	3.0 Program Plans & Toolkits

Most public agencies strive to offer high-impact programs and services. However, high-impact programs do not just happen. In fact, a **program plan** is an essential factor to offering high-impact programs and services. Preparing a program plan requires strategic thought, time and commitment. If done effectively, a program plan will provide clear direction and focus an organization's resources on mission-critical activities.

The Housing Authority intends to create and maintain plans and toolkits for each of its core programs, services and events. The **program plans** and **program toolkits** will serve as comprehensive playbooks for the agency.

	Documents and Contents
Program Plan	A Housing Authority program plan might include content such as the following: - Program Needs, Problems and Opportunities - Program Goals, Objectives and Expected Outcomes - Program Strategies and Activities - Program Target Population - Program Roles and Responsibilities - Program Collaborators - Program Budget and Budget Justification
Program Toolkit	A Housing Authority program toolkit might include documents such as the following: - Intake and Enrollment Forms - Curriculum Materials - Agenda and Run of Show - Marketing Pieces – *Flyers, Posters and Social Media Posts* - Position Descriptions - Action Plan and Timeline

	4.0 Stakeholder Survey Program

Every organization from a small nonprofit to a multinational corporation has stakeholders. **Stakeholders are individuals, groups, organizations or companies, who can affect, or be affected by an organization's actions.**

Many leaders make critical decisions just based on their gut feelings. In contrast, best-in-class leaders prioritize understanding the perceptions and opinions of their stakeholders through interviews, listening sessions and surveys prior to making critical decisions. The Housing Authority intends to establish a **Stakeholder Survey Program** to gather insights from its external stakeholders. Some of these stakeholders might include:
- **Residents**
- **Housing Choice Voucher Holders**
- **Family Self-Sufficiency Program Participants**
- **Landlords**
- **Community Partners**

The Housing Authority will consider three (3) types of surveys:

Survey	Summary
Stakeholder Satisfaction Surveys	The Housing Authority administers **comprehensive** and **annual** satisfaction surveys to gather insights on a wide variety of topics.
Stakeholder Pulse Surveys	The Housing Authority will administer **short** (3 – 5 questions) and **frequent** – *quarterly* or *biannual* – pulse surveys.
Stakeholder Touchpoint Surveys	The Housing Authority will administer **brief touchpoint surveys,** often called **incident surveys** or **transactional surveys**. The touchpoint surveys are designed to gather feedback about stakeholder experiences at various interaction touchpoints. A touchpoint survey captures the feedback soon after the interaction occurs, so the experience is still fresh for the stakeholder. An interaction touchpoint might include a **maintenance visit**, **Housing Specialist meeting**, **landlord seminar**, etc.

The Stakeholder Survey Program can provide a range of benefits:
- The agency can assess its performance and measure stakeholders' satisfaction.
- The agency can better understand the needs, expectations and opinions of its stakeholders.
- The agency can determine what it is doing well and identify improvement opportunities.
- The agency can use the survey results for benchmarking to measure changes over time.

The stakeholder survey results can provide valuable insights to make better decisions; inform future planning; create better policies and procedures; and build stronger programs and services.

	5.0 Program Evaluation System

An evaluation is a systematic assessment to inform decision-making, judgments and learning. More specifically, an evaluation is an analytical process of asking essential questions, gathering appropriate information to answer these questions and then analyzing and interpreting the information for a specific purpose. This purpose may include:

- To determine a program's effectiveness, value or merit
- To document whether program goals are met
- To provide information for the accountability of the program management
- To understand why a program works or not to inform future program replication or to enable the program management to make refinements to improve program effectiveness

The Housing Authority is considering designing and implementing a system to evaluate key programs, services and initiatives. There are two (2) primary types of evaluation that the agency may consider – **process evaluation** and **outcome evaluation**.

Process Evaluation	Outcome Evaluation
A process evaluation focuses on how a program was implemented and operates. A process evaluation can include multiple dimensions, such as: - Determining how a program operates to explain its successes and failures as it pursues its outcomes - Assessing a program's conformance to the original program design, regulatory requirements or even industry standards - Serving as a mechanism for improving program performance by identifying operational strengths and weaknesses	An outcome evaluation is conducted to determine whether and to what extent a program causes changes (positive or negative) to its participants after a specified period of operation. An outcome evaluation typically provides information about: - the extent to which the needs that gave rise to the program still exist - ways to enhance desirable results and reduce adverse results

The outcomes of programs are often difficult to measure because outcomes are difficult to gauge immediately. In contrast, process evaluations can provide more immediate feedback about what a program is doing, how it is doing it and how it can improve what it is doing. The Housing Authority can pursue program evaluations that integrate process evaluation with outcome evaluation.

The Housing Authority can prepare **evaluation plans**, **evaluation instruments** and other **evaluation tools** to provide structure and guidance for the program evaluation projects. The evaluation plan will define the evaluation questions, evaluation design, data collection procedures, data analysis procedures, reporting, etc.

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