

# Housing And Community Services Agency of Lane County

## Strategic Plan – 2016-2018

**MISSION:** Making a difference in the quality of affordable housing and related community services

**VISION:** Safe, affordable, energy-efficient housing for all low-income Lane County residents

**Semi-Annual Implementation Review  
June 2017**



<b>STRATEGIC ISSUE 1: COMMUNITY ENGAGEMENT</b>				
<i>Goal: Increase HACSA's ability to lead and facilitate conversations about affordable housing opportunities and challenges in the local community.</i>				
<b>Objectives</b>	<b>Tasks</b>	<b>Responsible Leaders</b>	<b>Proposed Performance Indicators</b>	<b>Timeline</b>
<b>1. Communications Capacity:</b> Create a communication plan, and allocate the resources necessary to implement and maintain this plan.	1. Develop comprehensive communications plan for HACSA that includes all relevant objectives in this strategic plan.	Jacob Fox and Ela Kubok	Communications plan is in place and updated at least annually.	12/31/2017
	<i>Mid-Year Update 6/30/16: Communications plan has been drafted, however in order to encompass all necessary aspects of a communications strategy more time will be devoted to this task. Extending the deadline to 12/31/2016.</i>			
	<b>Annual Update 12/31/16: The development of a comprehensive Communications system has been added to the scope of work for the recently selected Public Relations firm. Extending the deadline to 12/31/2017</b>			
	2. Determine the dedicated FTE necessary to implement and maintain the communications plan and account for this in the HACSA FY 16-17 organizational budget	Jacob Fox and Valerie Warner	Dedicated FTE allocated to implement and maintain communications plan.	9/30/2016
	<i>Annual Update 12/31/16: FY 16-17 organizational budget included dedicated FTE to implement and maintain a comprehensive communication system for HACSA. Ela Kubok has been designated as HACSA's Public Relations Coordinator.</i>			
	<i>Semi-Annual Update 06/28/2017: A full time Public Relations Manager position has been created and Ela Kubok has been designated to perform tasks related to public affairs, public relations and outreach.</i>			
<b>Annual Update 12/31/17: The update is that the FY18 budget includes a position for Public Relations Manager at 1FTE.</b>				
3. Develop template presentations with information about departments, programs, and the organization.	Public Relations Manager and/or key managers	template presentations completed and updated as needed	12/31/2016	
<i>Annual Update 12/31/16: The Communications Committee which commenced meeting in June 2016 is working towards developing tools that can be used for departments' presentation. The rebranding work will help focus this task.</i>				
<i>Semi-Annual Update 06/28/2017: A HACSA introduction presentation template has been developed and now presented at multiple stakeholder meetings as a tool to introduce the agency and summaries what we do. The presentation can easily be modified for each stakeholder based on the meeting needs.</i>				
4. Designate communications committee with a point person from each division to implement and maintain the communications plan.	Senior Management Team	committee established and meets regularly	6/30/2016	
<i>Mid-Year Update 6/30/16: Communications committee has been established and meets regularly. The first task for the Communications committee is to actively edit/correct/improve content on hacsa.org.</i>				

	<i>Semi-Annual Update 06/28/2017: The communications committee held a work session in March which included a 101 training on communications and reporting on stories, the committee evaluated its work and set goals for the future tasks of the group. Based on feedback and analytics of readership of the newsletter that the committee published, two new members have been added one representing the finance department, and one representing maintenance staff. The committee is preparing for its involvement in the new website development.</i>			
	5. Regularly test advertised links, phone numbers, and resources.	Communications committee members	no reports of links, phone numbers and resources not working	3/31/2016, ongoing
	<i>Mid-Year Update 6/30/16: Communications committee has been troubleshooting links and website connections, and will continuously monitor for such errors.</i> <i>Semi-Annual Update 06/28/2017: Communications committee continues the up-keep of the website with updates and improvements.</i>			
	6. Develop strong media relationships including culturally specific media outlets and maximize positive media opportunities.	Public Relations Manager and/or key managers	# of positive media reports; # of mentions of HACSA in related reports	3/31/2017
	<i>Semi-Annual Update 06/28/2017: In the last year there were over 20 media articles or videos regarding HACSA's work. The PR Manager and Executive Director were able to develop new media connections and relationships that result in positive media reports. These efforts are ongoing and the new communications plan will outline opportunities for engagement with the media that can result in positive coverage of the HACSA story.</i>			
	7. Create a "map" of internal and external stakeholders including culturally specific stakeholders with details about which group needs what information and what method will be use to communicate.	Public Relations Manager and/or key managers	# of stakeholders increased plugged in for info updates	6/30/2016
	<i>Mid-Year Update 6/30/16: This item will be included in the communications plan.</i>			
<b>2. Community Education:</b> Increase opportunities for information sharing between HACSA and relevant members of the housing community.	1. Inventory and expand current HACSA staff membership in boards, committees, community groups, etc.	Ela Kubok	expand membership on key boards, committees and community groups by 25%	6/30/2016, inventory 6/30/17, expand membership
	<i>6/30/16 Mid-Year Update: Inventory of HACSA staff membership on boards, committees, community groups has been completed. To mention a few of the important memberships, HACSA representatives sit on ShelterCare, NEDCO, ROA, Community Lending Works and Oregon Energy Coordinators and Affiliates boards of directors. Currently HACSA staff is member to 14 different organizations boards and committees.</i> <i>Semi-Annual Update 06/28/2017: Participation in membership of HACSA staff on various boards and committees is expanding. The newest additions include the Human Rights Commission, Regional Public Information Officers network, PNRC NAHRO and PeaceHealth Sacred Heart Medical Center Community Health Board.</i>			

	2. Establish a forum for executive directors and senior staff members to exchange knowledge about resources available within each organization and the community.	Jacob Fox	Lane county housing providers are successful in increasing resources at the state and local level	12/31/2016
<p><i>Annual Update 12/31/16: The Poverty and Homelessness Board and the sub-committees of this board have served as the forum to exchange knowledge and better leverage resources managed by community based organizations and local jurisdictions.</i></p> <p><i>Semi-Annual Update 06/28/2017: Jacob Fox is now the President of the Oregon Housing Authorities group. The Rent Assistance Division Director has also established a state wide email group for rent assistance professionals in housing authorities.</i></p>				
	3. Create opportunities for staff to engage with community housing partners and exchange information and share ideas.	Jacob Fox	# of meetings or cross agency visits	9/30/2016, ongoing
<p><i>Annual Update 12/31/16: In addition to numerous existing opportunities HACSA has organized a number of new opportunities to convene community housing partners to exchange information and share ideas. This includes a quarterly Shelter Plus Care coordination meeting to focus on better coordination specific to this HUD Continuum of Care rent assistance program. Another example is a new quarterly between HACSA staff and the Veterans Administration Veterans Affairs Supportive Housing team. Lastly, HACSA leadership is actively participating in numerous sub-committees of the Poverty and Homelessness Board and the Housing Policy Board, which are new opportunities to engage and share information.</i></p> <p><i>Semi-Annual Update 06/28/2017: 11 of HACSA staff participated in the PNRC NAHRO conference this spring where they had an opportunity to exchange best practices with over 200 other participants from the region. HACSA staff has been actively participating in various local events. HACSA co-hosted the Resilient Lane County Summit</i></p>				
	4. Conduct routine landlord communications and periodic meetings to update and clarify information specific to the Rent Assistance Division	Beth Ochs and Public Relations Manager	50% increase in proactive communication to LL's	6/30/2016, ongoing
<p><i>Mid-Year Update 6/30/16: HACSA staff from the Rental Assistance (RA) Division and the Property Management Division is attending the monthly Lane County Rental Owner's Association (ROA) meetings to address landlords' questions. RA Division Director is on the board of the ROA. Articles pertaining to the RA Division are published in the monthly ROA newsletter. The RA Division will facilitate workshops for landlords that will provide insight into multiple housing programs under the umbrella of the RA Division beginning in July 2016.</i></p> <p><i>Annual Update 12/31/16: In November 2016 HACSA in partnership with Lane County employed a Landlord Liaison position. The goal of this position is to provide a conduit between landlords and service providers in our community that will serve each party by providing education, resources and tools. In providing this each party will develop a deeper understanding of how to navigate one another's processes that will result in a positive rental experience for the tenant, landlord and service provider.</i></p>				

	<p>Semi-Annual Update 06/28/2017:  HACSA's Landlord Liaison has created curriculum that provides landlords with an overview of Section 8, VASH and the Centralized Wait List. Classes are offered onsite at HACSA as well as through Lane County's Rental Owners Association. These classes provide information on program regulations, how to navigate the lease up process, etc. The Landlord Liaison also maintains a help line accessible to landlords via phone to answer questions and discuss specific landlord/tenant issues. Classes are offered monthly at HACSA and several times a year through the Rental Owner's Association.</p> <p><b>Annual Update 12/31/17: HACSA's Landlord Liaison has expanded educational opportunities to include curriculum focused on Housing Quality Standard Inspections. These classes are offered at HACSA's office and through the Rental Owner's Association throughout the year. The Landlord Liaison gained accreditation from the Oregon Real Estate Board. This accreditation allows HACSA to provide Continuing Education Credit (CEU) classes to landlords. Property Management companies are required to earn a certain amount of CEU credits throughout the year in order to maintain their property management license. The Landlord Liaison has also forged new partnerships with community agencies. HACSA is currently in the midst of a pilot project for a Section 8 Loan Program in conjunction with Community Lending Works. The goal of the pilot project is to provide zero interest loans to Section 8 voucher holders to use for deposits at units they rent with their Section 8 voucher.</b></p>			
	5. Conduct periodic HACSA contractor communications to update and clarify information specific to contracting opportunities and requirements for HACSA contractors.	Public Relations Manager, Steve Ochs and Kurt von der Ehe	50% increase in proactive communication to contractors	12/31/2017
	<p><i>Semi-Annual Update: 06/28/2017 Semi-Annual update: The CAP team has increased the amount of contractor surveys, face to face solicitation of contractors in the local community, ever growing contractor list, developing PR materials and introducing the operations of CAP (what we do and who we are) through social media. We continue to work on an Open House type campaign to introduce the CAP team to local contractors and have an open forum for discussion to address concerns and procedures that may discourage them from participating in the bidding process otherwise.</i></p> <p><b>Annual Update12/31/2017: The CAP team has increased the amount of contractor surveys, face to face solicitation of contractors in the local community, ever growing contractor list, developing PR materials and introducing the operations of CAP (what we do and who we are) through social media. Introduce the CAP team to local contractors and have an open forum for discussion to address concerns and procedures that may discourage them from participating in the bidding process otherwise. Development team has adopted strategies to require CM/GC contractors to notify Minority and Women owned businesses of work opportunities.</b></p>			
<b>3. Political Advocacy: Advocate for the expansion of funding opportunities for low-income housing development, housing preservation and resident services.</b>	1. Map advocacy opportunities at the local, state, and federal level.	Jacob Fox	master calendar developed that identifies these advocacy opportunities	9/30/2016
	<p><i>Annual Update 12/31/16: This task is on hold until further notice. Due to the dynamic nature of legislative sessions at the national and state level it was impossible to create a master calendar. HACSA is more engaged than ever in local, state and national</i></p>			

	<p><i>advocacy efforts and we are often contacted to advocate for various housing and human services initiatives.</i></p> <p><i>06/28/2017 Semi-Annual update: HACSA staff and residents participated in the Housing Opportunity Day in Salem on May 18<sup>th</sup>. The day is focused on advocacy for housing issues.</i></p>		
Managers to advocacy opportunities; track 2. Assign senior opportunities and contacts with decision makers and other housing advocates.	Jacob Fox	# of communications with decision-makers	12/31/2016
<p><i>Annual Update 12/31/16: HACSA's senior managers are more proactively engaged in advocacy efforts than ever before. Senior managers are actively participating in advocacy efforts organized by the Housing Alliance, the Oregon Opportunity Network, the Oregon Housing Authorities association, the Lane County Rental Owners Association and the Oregon Energy Coordinators Association.</i></p> <p><i>Semi-Annual update 06/28/2017: Executive Director has testified during the legislative session in Salem four times. Opportunities for advocacy are tracked and encouraged.</i></p>			
3. Identify groups with shared interests, and work to coordinate advocacy efforts at the state level.	Jacob Fox	increased awareness of Lane County affordable housing issues with state elected officials	6/30/2016
<p><i>Mid-Year Update 6/30/16: HACSA Executive Director testified during the February legislative session of the Oregon Legislature, he also went to DC to meet respective legislative representatives from congress and the senate to discuss pressing affordable housing legislation, HACSA is part of the Oregon Housing Authorities association which focuses on legislative advocacy for 22 housing authorities in Oregon. In 2015 HACSA joined the Oregon Opportunity Network. Oregon opportunity network advocates for housing resources and policy at the local, county, state, regional, and federal levels. HACSA's staff is currently being assessed to participate in Advocacy Training from Oregon ON.</i></p> <p><i>Annual Update 12/31/16: Jacob was recently on boarded to the Sacred Heart Medical Center Community Health Board, which has supportive housing on its State of Oregon legislative advocacy priority list. This is an example of us identifying groups with shared interests and coordinating advocacy efforts.</i></p>			
4. Maintain a current contact list for local, state and national elected officials and their assigned affordable housing staff members when appropriate.	Ela Kubok		6/30/2016, update annually
<p><i>Mid-Year Update 6/30/16: The list has been created and contacts are being maintained. Task Completed.</i></p>			
<b>4. Branding: Increase</b> brand recognition to promote a positive and consistent image of the organization to internal and external stakeholders.	1. Facilitate (or hire a facilitator) to baseline current HACSA brand and to develop strategies to improve the HACSA brand.	Public Relations Manager and/or key managers	3/30/2017 In progress
<p><i>Semi-Annual Update 06/28/2017: In October, HACSA released an RFP for professional media and public relation services. Six responses were evaluated by a</i></p>			

<p><i>selection committee composed of various stakeholders including representatives from Lane County. Three firms were interviewed. The selection process was very competitive. After successful completion Verb Marketing + PR was contracted to conduct a rebranding and renaming process for HACSA starting January 2017. The new name and new brand is expected to be launched in January 2018.</i></p>				
2. Review and update HACSA's mission and values		Public Relations Manager and/or key managers	Mission and values updated	9/30/2017
3. Coordinate all branding with Cornerstone as appropriate to strengthen the partnership effort		Jacob Fox and Public Relations Manager		N/A
<p><i>Semi-Annual Update 06/28/2017: See reference to formalizing partnership on page 10.</i></p>				
4. Change the agency's name from HACSA to something more relevant and recognizable.		Jacob Fox and Senior Management Team	HACSA, in its new name, is known as the largest affordable housing provider in Lane County and the 2nd largest in the states	9/30/2018
5. Establish social media accounts and protocol for content and distribution		Public Relations Manager and/or key managers		12/31/2017 In Progress
<p><i>Update 12/31/16: Annual Update: The renaming and rebranding efforts that will take place in 2017 will make possible that the social media accounts can be established with the new name of the organization. Extending the deadline to 12/31/2017</i></p> <p><i>Update 06/28/2017: Semi-Annual Update: In February the first social media account was established, HACSA has now has a Facebook page with modes 150 likes growing gradually. The content on the page reached up to 1200 in a week thought other stakeholders sharing HACSA Facebook stories. HACSA Facebook page has a really good mix of content that has been shared by over 30 different stakeholders which generates more attention to HACSA. Since March HACSA has a Twitter account which is very active especially during event like conferences and advocacy meeting, which causes a lot of traffic and shares on Twitter from other organizations. The accounts are supervised by the Public Relations Manager, and content in curated thought various channels including the communications committee. Strategy on how to grow the audiences for the social media will be included in the communications plans.</i></p>				
6. Create branding manual and downloadable resources for employees to ensure consistent communications.		Public Relations Manager and/or key managers	Branding resources available to staff	6/30/2017 In progress
<p><i>Semi-Annual Update 06/28/2017: The rebranding and renaming process will result in a brand plan as one of the deliverables from Verb Marketing + PR. The deadline for completion is extended to 12/31/2017</i></p>				
<b>STRATEGIC ISSUE 2: SERVICE DELIVERY</b>				
<i>Goal: Provide employees with support to improve customer service outcomes.</i>				
<b>Objectives</b>	<b>Tasks</b>	<b>Key Leaders</b>	<b>Proposed Performance Indicators</b>	<b>Timeline</b>

<b>1. Staff Training:</b> Expand opportunities for staff to gain necessary knowledge and skills to carry out their positions could be offered.	1. Provide trainings in: customer service skills; meeting the needs of clients with unique or marginalized needs; de-escalation.	Karla Ramsdal	Increased number of customer and employee comments regarding positive customer service.	Initial trainings complete by 9/30/16 and annual refreshers in 2017 and 2018
	<p><i>Annual Update 12/31/16: HTVN Customer Service Training has been completed by Management for review. In process of assigning employees the training. EE's should have training completed by March 31, 2017. De-escalation and meeting needs of clients will follow quarterly.</i></p> <p><i>Semi-Annual Update 06/30/17: Customer Services Training completed by all employees. This training has been added to on-boarding to all new employees. Additional onboarding trainings have continued to grow; such as Harassment Training, Harassment and Diversity Respecting Differences. Each quarter new employees and employees with the most seniority are being invited to our new Division Orientation Event (DO Event) that introduces each division to employees which allows them to receive a broader perspective of what services HACSA provides to our clients and also creates a culture of inclusiveness and respect amongst each other by having one on one conversation between Leadership and line staff during the ½-day event. This June will be our second DO Event, our inaugural event was a success and was received well by all.</i></p> <p><b>Annual Update 12.31.17: Customer Service Training, Harassment Training, Harassment and Diversity Respecting Differences have all been completed by new employees which has been a total of 6 since 06.30.17. We have completed four (4) DO Event and continue to receive rave reviews. The remaining 23 current employees will be invited to the next two DO Event, which are scheduled in 03.18 and 06.18.</b></p>			
	2. Create a system to periodically seek feedback from staff to determine what other trainings and skills development is needed for effective service delivery.	Karla Ramsdal	training and skill development opportunities are developed based on input from staff	6/30/2016
<p><i>Mid-Year Update 6/30/16: Due to protracted contract bargaining with AFSCME Local3267 this item was put on hold, due date changed to 12/31/2016</i></p> <p><i>Annual Update 12/31/16: Communication via e-mail and Labor Joint Management (LJM) Committee is on-going. Various e-mails have been circulated regarding trainings that are provided by Cascade Health Solutions, along with trainings from HTVN and quarterly e-mails for computer training. Timeline continuous.</i></p> <p><b>Annual Update 12.31.17: The opportunity arises on a continued basis to share with employees that they are invited take initiative on trainings they feel will enhance their knowledge and skills level along with saving time and funds. Several employees have reached out to HR and have requested additional trainings or have asked for ideas on how to gain the skill they are interested in. HR has followed up and provided information on trainings via HTVN or Cascade Health. Other employees have received the "Training Request" form that helps them outline what is needed to determine if the training they are requesting is budget friendly and necessary for their current position or a position that they are interested in.</b></p>				
3. Research and create an inventory of possible trainings and services that are available for internal and external training opportunities.	Karla Ramsdal		12/31/2017	



	<b>Annual Update 12/31/17: Complete, 12.31.17 Our inventory of trainings exist in the HTVN portal</b>			
	4. Create opportunities for staff from both HACSA locations to engage on topics relevant to their shared work.	Karla Ramsdal	# of interdepartmental events	6/30/2016
	<p><i>Mid-Year Update 6/30/16: HACSA's Inclusion Council has hosted monthly training sessions on various topics; the trainings occur in both locations on a rotating basis and encourage engagement for staff from different divisions.</i></p> <p><i>Annual Update 12/31/16: Discussion during LJM currently focused on the Rent Assistance and the Property Management Division teams and the work that may be relevant to each other's.</i></p> <p><i>Semi-Annual Update 06/30/17: Continued shared conversations are being had by FV and DI and various departments during the LJM meetings; such as the use of FILEVISION and the reasoning behind the turnaround on scanning mail into the system. The above mentioned quarterly Division Orientation event has allowed for great opportunities for employees to learn of work that is done by all of HACSA departments. These efforts are evolving and ongoing.</i></p> <p><b>Annual Update 12/31/17:</b></p> <ul style="list-style-type: none"> <li>• <b>HACSA continues to engage both buildings in trainings; HAB notes training, SNAP Trainings, Partner Presentations, Safety Huddles and this was our first year of holding Beautification Days. We were able to have a total of four beautification days where all employees were invited to either get their hands dirty by helping around our complexes by painting parking lines, weeding, planting flowers, spreading bark or by working in the office purging files. Another way we are providing engagement throughout the Agency is during our Agency all meeting we have rotating seating arrangement so everyone can get to know each other.</b></li> <li>• <b>The PMD and S8 Divisions have worked closely together on several recent initiatives. We have created a Collaborative Systems Workgroup to discuss IT/Software issues that overlap into both departments. We also recently worked together to determine the type of tables that would be purchased to support both Mobile Inspect and Mobile Work Order. S8 Staff who are currently using Mobile Inspect will provide updates and information to PMD to help them prepare for a roll out in 2018 of Mobile Inspect. Eight Beautification Days were held at Public and assisted housing complexes over the summer. Maintenance skill training was provided during several of the days. Staff from both the Fairview and Day Island Office worked together on repairs as well as activities to give back to our housing communities and improve the overall appearance of the complexes such as; spreading bark, painting and trimming bushes. Staff from different departments and divisions were mixed together to promote relationship building.</b></li> </ul>			
<b>2. Service Accessibility:</b> Help underserved clients enter programs that meet their needs, and decrease	1. Consider adding positions and/or reclassifying existing Rent Assistance and Property Management line staff positions to provide expanded resident services including housing search supports.	Beth Ochs, Darlene Kelly and Mira Gattis		9/30/2017

clients' barriers to accessing HACSA services.	<p><b>Annual Update 12/31/17:</b></p> <ul style="list-style-type: none"> <li><b>The Rent Assistance Division is in the process of implementing a paperless Housing Quality Standard Inspection (HQS) system. The implementation of this system may allow for a reduction in HQS staff. A reduction in HQS staff would allow funds to be invested in resident services for Section 8 tenants. Efficiencies gained from the paperless system would need to be evaluated before a reinvestment of funds could be implemented.</b></li> <li><b>PMD Division has not added any specific positions for resident services but has worked closely with our Resident Service Team to expand services at several housing sites. These services include a grant to provide onsite health services for seniors, the creation of Little Libraries (to be installed soon) and reading programs for youth.</b></li> </ul>		
2. Identify key property management and rent assistance documents to translate into Spanish. Complete translation into Spanish. Research to determine whether other non-English language document translations are merited.	Christi Champ and Jill Fields		9/30/16 documents identified, 12/31/16 Spanish translations complete, 6/30/17 other language assessments complete
<p><i>Annual Update 12/31/16: Both the Rental Assistance Division and Property Management Division have identified documents that need to be translated. The translations have not been completed. Extension to 3/6/2017</i></p> <p><i>Semi-Annual Update 06/31/17: The translation is currently in the RFP preparation phase.</i></p> <p><b>Annual Update 12/31/17:</b></p> <ul style="list-style-type: none"> <li><b>Identification of documents will be completed by, April 1, 2018.</b></li> <li><b>The target date to have translations completed is July 1, 2018.</b></li> <li><b>Research will be completed by Feb 1, 2018</b></li> <li><b>43 key documents to be translated have been identified for the Rent Assistance Division. A four step process is underway to implement a Language Assistance Plan (LAP) for Limited English Proficiency (LEP) persons. A four factor analysis of language needs will be completed by January 31, 2018. The LAP will be completed by March 31, 2018, followed by the issuance of an RFP for translation services by April 30, 2018. The translation of all key documents will be completed by June 30, 2018.</b></li> </ul>			
3. Establish and advertise a process for providing interpretation services.	Christi Champ	survey non-English speaking residents/participants to determine satisfaction with HACSA's efforts	3/30/2017
<p><b>Update 12/31/17: Processes will be established, and advertising can begin in the April to July timeframe of 2018. (CC)</b></p>			
4. Identify opportunities for face-to-face client engagement.	Beth Ochs and Darlene Kelly	# of face-to-face client interactions increase	6/30/2016, ongoing
<p><i>Mid-Year Update 6/30/16: The RA Department has established set procedures that provide face to face interaction for any client that visits the Day Island office during business hours.</i></p> <p><i>Annual Update 12/31/16: Property Management Division Director continues to work closely with Resident Services team to attend or offer meetings with residents in various complexes to discuss current issues and concerns.</i></p> <p><i>Semi-Annual Update 06/28/2017: PM's regularly attend resident meetings, Director</i></p>			

periodically attends resident meetings. Director regularly attends RAB - Resident Advisory Board Meetings.

In an attempt to ensure families are maintaining their housing subsidy to the highest degree possible the Rent Assistance Division developed a partnership with the Resident Services Department of HACSA in May 2017. This newly formed partnership provides a service to Section 8 and VASH families who are at risk of losing their housing subsidy due to allegations the family violated Family Obligations under HACSA's Housing Programs. The Resident Services Department is able to bring the expertise of community resources to a family in jeopardy. By engaging face to face with the family during informal hearing reviews alternatives to termination of housing subsidy are reviewed and opportunities to correct prior behavior are offered. For example, a family may be at risk of losing their housing subsidy due to an inability to maintain a sanitary environment within their unit. By engaging Resident Services the family can be connected to community partners who can assist the family in getting their home to an acceptable level of cleanliness. Thus, the family is able to retain their housing subsidy voucher.

**Update 12/31/17:**

- **The Rent Assistance Division has strengthened its presence at community events that are of interest and/or attended by our clients. Rent Assistance Division management and line staff have attended and/or presented at community events such as; "Know Your Rights – Fair Housing" training for community members presented by the City of Eugene, "Veteran's Stand Down" presented by Lane County Stand Down which provides resources and social service information for local veterans, "Senior and Disabled Services Resource Fair" presented by Senior and Disabled Services which provides resources and social service information for local seniors, disabled individuals and their caregivers and at "Florence Area Community Collation" which provides a platform for community members/organizations to better connect resources.**
- **The PMD is working to create a new resident survey post inspection to solicit input from residents on the inspection process. The PMD and RAD Division Analysts have developed a timeline to finalize a Language Access Plan that will include access to interpretation services and document translation.**

*Goal: Increase client self-sufficiency and units/vouchers dedicated to special needs populations*

Objectives	Tasks	Key Leaders	Proposed Performance Indicators	Timeline
<b>1. Client Self-Sufficiency:</b> Create and expand programs that develop the self-sufficiency of clients, in order to better serve waitlisted people and underserved clients.	1. Expand Family Self-Sufficiency program to include more clients.	Mira Gattis, Beth Gydé	# of additional clients	ongoing
	<i>Annual Update 12/31/16: FSS recently made a program change so that FSS Coordinators are no longer doing income for S8 participants. This opens up additional slots for FSS. By April of 2017 we hope to increase our numbers to 180 FSS Participants. We are also working to add a bilingual HACSA staff person to FSS so that we are better able to serve our Spanish speaking clients.</i> <i>Semi-annual update 06/28/2017: FSS now has 171 participants and have a bilingual staff person to work with Spanish language preference participants. We currently have a wait list of 37 people.</i>			
	2. Provide links to partner services on the website for residents and community members to access.	Mira Gattis, Ela Kubok	# of links added	6/30/2016
<i>Mid-Year Update 6/30/16: Staff is in the process of crosschecking provider links, to assure relevance and validity.</i>				

	3. Create and incentivize community-building opportunities for HACSA residents across various properties and programs.	Mira Gattis, Beth Gydé	# of events /opportunities	6/30/2016, ongoing
	<p><i>Mid-Year Update 6/30/16: Staff has met with the Property Management company for Tax Credit projects to brainstorm the best way to coordinate and expand services. The Resident Advisory Board has voted to take a more active role in starting or maintaining resident groups and doing outreach to Section 8 residents.</i></p> <p><i>Annual Update 12/31/16: Resident Services distributed over 800 food boxes to Seniors in 2016, and four sites continue to provide the on-site Extra Helpings food distribution program. All complexes received 12 months of newsletters this year. Two sites will begin a reading program in 2017 for youth ages 4-8 with HACSA staff volunteering to read to these youth to increase reading proficiency.</i></p> <p><i>Semi-annual update 6/30/2017: Four Tax Credit sites now have Extra Helpings Programs, and Bascom 2 has a contract for on-site services for children and families. We continue to bring food boxes to over 80 seniors monthly. Our new Resident Services Assistant is bilingual (Spanish), and will be doing extensive outreach to our Latino residents. The Reading Program for ages 4 to 8 is currently at 3 complexes (2 utilize HACSA volunteers).</i></p>			
	4. Create additional services for tenants or participants aging in place, particularly those in LIHTC housing.	Mira Gattis, Beth Gydé	# of added services	6/30/2016, ongoing
	<p><i>Mid-Year Update 6/30/16: Through numerous grants (Madrone Continuum of Care, Pay For Success Grant, Kaiser Permanente Grant), and securing an IGA for the Housing First project HACSA will be able to expand its resident services palette.</i></p> <p><i>12/31/16 Annual Update: HACSA and Cascade Management Co, the PM Company for the LITC's are working closely to bring more services to these sites but assuring that Cascade is up to date on providers of programs that can serve residents. Programs that have been introduced include Extra Helpings Food Program, and Seed to Supper Classes.</i></p> <p><i>In 2016, HACSA has updated existing resident services agreements with various service providers. We have also put new agreements in place to add services (NAHMI at New Winds, SVDP at Bascom Village II, and Columbia Care at Heeran Center) and formalize existing partnerships.</i></p> <p><i>Semi-Annual Update 6/30/2017: HACSA is currently a leader of a Lane County pilot project through the Senior Behavioral Health Initiative with the intent of bringing health support activities on-site at two of our complexes (on urban, and one rural). In addition, we are partners in a Kaiser funded grant to bring Eviction Prevention services to our residents who are in danger of losing housing due to behavioral health issues.</i></p> <p><b>Annual Update 12/31/17: HACSA created new resident services agreements for Richardson Bridge (Cornerstone) and The Oaks at 14<sup>th</sup> (Sponsors Inc.) to provide a full menu of resident services at those locations.</b></p>			
2. Special Needs Housing: Expand the number of new units and existing units that are dedicated to special needs populations including individuals and families experiencing homelessness, coming out of corrections, etc.	1. Baseline the number of current units and vouchers that are dedicated to special needs populations including commitments yet to be made for development projects and grants like the Pay for Success DOJ/HUD grant.	Mira Gattis	# of current units and commitments baselined and used in communications plan to demonstrate HACSA's commitment to special needs populations	6/30/2016
	<p><i>Mid-Year Update 6/30/16: The numbers have been baselined. Community members who entered PH or S8 housing in the past year were surveyed to begin building a stronger database of our special needs populations.</i></p> <p><b>Annual Update 12/31/2017: The Madrone program is fully leased up. Pay for Success planning grant is moving forward and end payer engagement including with Lane County is underway.</b></p>			

	2. Survey all 2015 new residents of HACSA housing and Section 8 participants to determine how many could be representatives from a special needs classification	Beth Ochs, Darlene Kelly and Mira Gattis	# identified of 2015 new residents and new participants that represent special needs populations	9/30/2016
<i>Annual Update 12/31/16: In May 2016 all new applicants for Section 8, VASH and Public Housing were surveyed via mail regarding prior living situations, past criminal activity, participation in the military, utilization of services, etc. 897 families were surveyed, 184 families responded.</i>				
	3. Modify admissions systems to better track and report special needs populations that are utilizing HACSA properties and housing programs.	Beth Ochs and Darlene Kelly	reports can be pulled from housing software HAB that shows how many special needs populations are served by HACSA	6/30/2017
<i>Semi Annual Update 06/28/2017: In May 2017 HACSA held a lottery for admission to the Section 8 Program. Over 4000 families applied. The application process was modified to capture populations that HACSA had not tracked in the past. Populations now tracked in the pre-application process include; former veteran status, registered sex offender status, disability status and current and/or past federal housing subsidy status. By capturing some of the unique populations of our community HACSA are able to potentially create new local preference designations within our housing programs and provide valuable information to community partners. For example, HACSA is not able to provide housing to registered lifetime sex offenders under HUD regulations. However, knowing how many persons applied under this status could be valuable information for community partners who may be able to provide housing. Data driven decisions for our jurisdiction as a whole creates opportunities to target funding to specific areas as needed as opposed to assuming which populations may be lacking.</i>				

	4. Lead and/or assist in applications for grants that will expand HACSA's ability to serve special needs populations	Mira Gattis	increased funding for resident services for special needs populations	3/30/16 first grant, 9/30/17 second grant, 9/30/18 third grant
<p><i>Mid-Year Update 6/30/16:</i>  <i>Madrone Continuum of Care Grant: \$435,333.00 per year</i>  <i>Pay For Success Grant: \$ 1.3 million for three years</i>  <i>IGA for Housing First Project: \$50,000</i></p>				
	5. Convene other housing provider leadership to determine whether a joint efforts to expand housing opportunities for special needs populations could be a partnership effort	Jacob Fox	additional units are designated in non-HACSA housing	9/30/2017

**STRATEGIC ISSUE 3: CAPACITY BUILDING**

*Goal: Develop and preserve more affordable housing units by leveraging collaborations, reducing costs, and seeking alternative approaches to funding.*

Objectives	Tasks	Key Leaders	Proposed Performance Indicators	Timeline
<p><b>1. Funding Streams:</b> Build the organization's ability to seek diverse revenue sources.</p>	1. Explore innovative ways to leverage existing properties to draw in more funds - ex. cell phone tower.	Steve O., Beth G., Darlene Kelly	revenue diversified	3/31/2016, ongoing
	<p><i>Mid-Year Update 6/30/16: Staff has secured a cell phone tower on Parkview Terrace roof. HACSA is a recipient of \$50,000 from EWEB thought the 2016 Greenpower grant for solar panels at Parkview Terrace, which will lead to significant decrease in utility expenses over time.</i></p> <p><b>Annual Update 12/31/17:</b></p> <ul style="list-style-type: none"> <li><b>Staff is working with Lane County Parole and Probation to rent out office space at Jacobs Lane. Leased area in Signpost office to SVDP. Looking at Bus Barn Building and adjacent office building for possible long term lease, to sub-lease.</b></li> <li><b>Staff has contracted with Verizon to install a cell phone tower on the Parkview Terrace roof. The cell phone tower project is still in the planning phase. HACSA is hoping to leverage this grant money and install solar grids in two locations as part of the Energy Performance Contract with Johnson Controls. HACSA also met with Verizon for a possible site location for equipment at a multi-family site, which was not selected by Verizon. HACSA continues to look for additional funding streams.</b></li> </ul>			
	2. Document successes from existing programs and partnerships, to increase HACSA's attractiveness to major grantors.	Public Relations Manager and Mira Gattis	increased coverage for HACSA successes in the local media	12/31/2016, ongoing
	<p><b>Annual Update 12/31/16:</b> Photos have been taken at all major events organized, a big event 100<sup>th</sup> homeowner co-hosted with first story, success stories have been shared in professional newsletters targeted for Oregon housing providers as well as the Pacific North West region affordable housing providers. Press releases have been shared with local media to inform of success and or events hosted. An annual graduation celebration for family self-sufficiency program graduates in currently in the works of being established.</p>			
3. Align local and state political advocacy efforts to seek out new opportunities and funding for property development.	Jacob Fox, Steve Ochs	increased funding acquired for existing and new developments	3/31/2016, ongoing	
<p><i>Annual Update 12/31/16: Steve Ochs is actively participating on the Housing Alliance's workgroup on preservation of affordable housing including HACSA's public housing portfolio. The Housing Alliance has an aggressive set up specific goals to allocate new funding from the 2017 Oregon legislative session.</i></p>				

	<p><i>Semi-Annual update 06/28/2017: Steve Ochs is actively participating on the Housing Alliance workgroups on preservation and development of affordable housing. Mr. Ochs also serves on the Eugene/Lane County Housing Policy Board which makes policy, funding, and other recommendations regarding affordable housing to Eugene, Springfield and Lane County governments.</i></p> <p><b>Annual Update 12/31/17: Steve Ochs continues to participate on the Housing Alliance workgroups on preservation and development of affordable housing. Mr. Ochs also serves on the Eugene/Lane County Housing Policy Board which makes policy, funding, and other recommendations regarding affordable housing to Eugene, Springfield and Lane County governments. Mr. Ochs serves on a task team as part of the Housing Policy Board the researched recently recommended to Eugene City Council to adopt a construction excise tax which would bring millions of local dollars to affordable housing.</b></p>			
<p><b>2. Asset Preservation:</b> Maintain and upgrade existing properties in order to reduce long-term costs.</p>	<p>1. Develop comprehensive asset preservation plan and corresponding presentation for elected officials and senior leadership from the jurisdictions</p>	<p>Steve Ochs, Darlene Kelly and Beth Gyde</p>	<p>necessary support is achieved from the local jurisdictions</p>	<p>12/31/2016</p>
<p><i>Annual Update 12/31/16: HACSA developed an Asset Preservation Plan presentation and has presented it to (various agencies – HACSA Board, OHCS and representatives of local jurisdictions for City of Eugene and Springfield)</i></p> <p><b>Annual Update 12/31/17: The Property Management Division (PMD) is working closely with CAP and Asset Management employees to review capital needs at three mutli-family complexes. This high level needs assessment will assist us in identifying capital projects and requesting appropriate rent increases or financing to complete needed work. This group also meets biannually to review capital projects for three year rolling periods.</b></p>				
<p><i>Annual Update 12/31/16: Capital Improvement Plans are being implemented on all HACSA affordable housing assets. Capital Needs Assessments have been completed by internal staff or by contracted vendors. 5 year work budgets and capital work plans have been developed and are being implemented throughout the portfolio. Task Completed – no further updates.</i></p> <p><b>Annual Update 12/31/17: Capital Improvement Plans continue to be updated to forecast 5 years out throughout the portfolio.</b></p>				
<p><i>Annual Update 12/31/16: Capital Improvement Plans are being implemented on all HACSA affordable housing assets. Capital Needs Assessments have been completed by internal staff or by contracted vendors. 5 year work budgets and capital work plans have been developed and are being implemented throughout the portfolio. Task Completed – no further updates.</i></p> <p><b>Annual Update 12/31/17: Capital Improvement Plans continue to be updated to forecast 5 years out throughout the portfolio.</b></p>				
	<p>3. Market Day Island, 48th and Main and the River Road sites and maximize return on the sale of these properties.</p>	<p>Jacob Fox and Steve Ochs</p>	<p>HACSA has the proceeds necessary to acquire a new administrative building and the remainder of the funds will be used for preservation</p>	<p>6/30/2017</p>
<p><i>Semi-annual update 06/28/2017: The real estate properties 48<sup>th</sup> and Main street site in Springfield, and River Road site are currently marketed for sale, the River Road site has an offer which has been accepted and the buyer is currently performing the due diligence on the site. Preparation to market the Day Island site is underway and it will be marketed in the next six months.</i></p> <p><b>Annual Update 12/31/17: The River Road site is still under contract to sell and buyer is completing land use process. The 48<sup>th</sup> and Main Site is still on the market and the price has been reduced in hopes of achieving more offers. The Day Island site is being prepared to be marketed in the spring of 2018.</b></p>				

5. Secure new administrative building for HACSA and future development sites with the funds from the sale of previously mentioned buildings		HACSA combines two locations into one administrative building.	12/31/2017
6. Complete the conversion of the RAD award from portfolio to multi-phase and complete the multi-phase plan for all associated projects	Steve Ochs	RAD project continues on schedule	6/30/2016
<p><i>Mid-Year Update 6/30/16: The RAD multi-phase application and supporting documents were submitted to HUD in May 2016. PIVOT Architecture and Meili Construction were hired to for the first phase of RAD which includes converting 12 units into Richardson Bridge.</i></p> <p><i>12/31/16 Annual Update: The RAD Multi-phase application was approved by HUD in August of 2016. HACSA was awarded 9% tax credits for Richardson Bridge in December 2016 with construction expected to begin in mid- 2017.</i></p> <p><i>Semi-Annual Update 06/28/2017: The RAD commitment to convert issued by HUD in June with construction expected to begin in July or August.</i></p> <p><i>The first 12 units are scheduled to be converted to Richardson Bridge in summer of 2017 with sales of the scattered sites to begin in late summer.</i></p> <p><b>Annual Update 12/31/17: The 12 units converted into Richardson Bridge in fall of 2017. Construction at Richardson Bridge started in late summer. Sale of the 12 units has started with two sold and two currently on the market.</b></p>			
7. Complete the financial structuring for Sheldon Village, Richardson Bridge and Laurel Gardens and complete necessary renovations	Steve Ochs, Beth Gyde and Kurt von der Ehe	All three properties have extended their useful life by at least 20 years.	9/30/17 SV and RB renovations complete, 9/30/18 LG complete
<p><i>Mid-Year Update 6/30/16: Preliminary financial structure for Richardson Bridge rehabilitation, as well as Sheldon Village I and II has been completed.</i></p> <p><i>Semi-Annual Update 06/28/2017: Financial structuring has been completed for Richardson Bridge with rehab to begin in the summer of 2017. Preliminary cost estimates have been completed for Sheldon Village and construction options are under review.</i></p> <p><b>Annual Update 12/31/17: Richardson Bridge finances closed in summer of 2017 and renovations are in progress with completion expected in summer of 2018. Staff is looking at a conventional loan to renovate Sheldon Village. If successful, renovations will begin in summer of 2018. Financial structuring for Laurel Gardens will start once renovations begin on Sheldon Village.</b></p>			
8. Complete sale of 112 housing units and provide replacement housing: use portion of proceeds to pay for new construction and a portion for preservation of existing units.	Steve Ochs and Kurt von der Ehe	Proceeds acquired and deployed strategically between new construction and capital projects on existing buildings	9/30/17 sale of initial 10 units complete
<p><i>Semi-annual update 06/28/2017: The first 12 units are scheduled to be converted to Richardson Bridge in summer of 2017 with sales of the scattered sites to begin in late summer.</i></p>			
9. <del>Secure consultant to</del> complete RAD subsidy conversion analysis on the remainder of HACSA's public housing portfolio and submit RAD application if appropriate.	Steve Ochs and Darlene Kelly	informed decision made on whether or not to submit application for conversion	9/30/2017
10. Continue to find ways to reduce expenses with an emphasis on decreasing utilities use and	Valerie Warner	cost saving measures implemented	3/31/2016, ongoing



	minimizing landscaping costs on existing properties.			
<p><i>Mid-Year Update 6/30/16: HACSA is currently monitoring utility bills to catch and address water leaks. The Agency was able to redeem \$2500 from EWEB.</i></p> <p><i>Annual Update 12/31/16: The Energy Performance Contracting project is expected to have a significant impact on utility costs. The EPC contract is expected to be awarded in January 2017.</i></p> <p><i>Semi-annual update 06/28/2017: The EPC plan will be sent to HUD in late June and we anticipate implementation in Fall 2017. Due to uncertainty about the implementation schedule, it is difficult to project savings for year one but over the 20 year life of the EPC, net savings are expected to approach \$1.9M.</i></p> <p><b>Annual Update 12/31/17: 9. Staff has started RAD conversion analysis in-house to make decision on application for conversion.</b></p> <ul style="list-style-type: none"> <li>• <b>HACSA is very close to starting the Energy Performance Contracting project. This project is expected to generate gross utility savings of approximately \$9M over 20 years. After financing costs and other related costs, we project net savings of \$1.2M that will be available to support public housing units. HACSA is also beginning a project with a consultant to make efficiency improvements to garbage collection, which costs HACSA over \$150K per year for public housing alone.</b></li> <li>• <b>EPC contract is under review by HUD. Financing is close to complete. Weekly meetings are held between EPC project manager and key HACSA staff. The second meeting on next steps for RAD conversions of additional PH complexes is scheduled for 1/10/18.</b></li> </ul>				
	11. Develop a funding strategy for capital needs at Firwood (carried over from 2015 strategic plan)	Darlene Kelly, Valerie Warner, and Jeff Bridgens	Firwood has funding for capital needs improvements	6/30/2016 ongoing
<p><i>Mid-Year Update 6/30/16: A contractor to perform the capital needs assessment has been secured. This is a first step to developing a comprehensive funding needs estimate.</i></p> <p><i>12/31/16 Annual Update: CNA for Firwood complete. Dec 2016, Small workgroup created to begin discussing options for the Capital Needs at Firwood.</i></p> <p><i>Semi-annual update 06/28/17: The multi-department workgroup has met several times to brainstorm a plan for the Firwood capital work. The ground lease imposes some constraints on our ability to recapitalize this property; however we do have a plan that includes raising rents and beginning to address some of the most pressing capital needs.</i></p> <p><b>Annual Update 12/31/17: HACSA management has created a plan to extend the ground lease with the owners of Firwood to 2039 and to recapitalize the project by refunding the current revenue bonds and borrowing additional funds to address the items identified in the capital needs assessment. The board approved the proposal to extend the ground lease to 2039 on December 20, 2017.</b></p>				
	12. Develop preventive maintenance schedule for HACSA-managed buildings	Darlene Kelly and Kurt von der Ehe	Preventative maintenance schedule is in place and is completed per schedule	6/30/2016
<p><i>Mid-Year Update 6/30/16: The Property Management Division is implementing preventive maintenance inspections on July 1<sup>st</sup>. Each Property Manager will turn them in monthly, one per complex with their timecard, starting with their July timecard.</i></p> <p><i>Semi-Annual Update 6/28/2017: Preventive Maintenance cards are now completed quarterly for each complex by the Property Managers</i></p> <p><b>Annual Update 12/31/17: Preventative Maintenance inspections are conducted quarterly by Property Managers for each site. Additional contracts are being developed to</b></p>				

	<b><i>maintain and extend the life of ductless heat pumps and roofs. New roofs are being installed with equipment that will allow HACSA maintenance staff to safely perform roof maintenance.</i></b>			
<b>3. New Development:</b> Increase number of affordable housing units available to Lane County Residents.	1. Complete financing plan for the 6th and Oaks project to include 10 two bedroom RAD units if feasible	Steve Ochs	9% LIHTC application is submitted.	6/30/2017
	<i>Semi-Annual Update 06/28/2017: There was no LIHTC round in 2017 for 6<sup>th</sup> &amp; Oak so application will be submitted in 2018. New deadline 12/31/2018</i> <b>Annual Update 12/31/17: Finance Plan is complete and will submit for LIHTC in early 2018.</b>			
	2. Determine whether Glenwood Place is a viable project given infrastructure uncertainty not under HACSA control. Make corresponding decision on timing related to the purchase of the property.	Steve Ochs	Clear go/no go infrastructure needs for project success communicated to jurisdictional partners	6/30/2017
	<i>Semi-Annual Update 06/28/2017: A waiver for the Environmental Review process for Glenwood is in process. Once that process is complete a decision can be made to purchase/not purchase the property.</i> <b>Annual Update 12/31/17: No change. A waiver for the Environmental Review process for Glenwood has been received. Once that process is complete a decision can be made to purchase/not purchase the property.</b>			
	3. Develop Project Based Section 8 program to support new developments and existing projects for special needs populations.	Beth Ochs	Project Based Section 8 program exists with specific special needs population targets.	9/30/2017
	<b>Update 12/31/17:</b> <ul style="list-style-type: none"> <li>• <b>The Rent Assistance Division will issue an RFP by end of CY 2017 to competitively award up to 50 Project Based Vouchers in Lane County.</b></li> <li>• <b>Project Based Program was adopted into Admin Plan and will be implemented early 2018.</b></li> </ul>			
4. Identify sites and complete the financing plan for the remaining new developments necessary to complete the RAD requirements	Jacob Fox and Steve Ochs	RAD requirements met	9/30/2018	
<b>Annual Update 12/31/17: HACSA executed an option agreement on one property on Taney Street in late 2017 and is looking closely at others to allow for the building of 100 new units.</b>				
<b>4. Innovative Partnerships:</b> Continue to develop and formalize service partnerships to increase efficiency, social equity, and effectiveness.	1. Formalize partnerships initiated by staff to ensure survival after retirement, promotion, etc. (e.g. writing MOUs).	Jacob Fox and Mira Gattis		9/30/2016
	<i>Annual Update 12/31/16: A model MOU was developed to formalize the partnership between HACSA and St. Vincent DePaul for Bascom Phase 2. This MOU will be used for other partnerships we have with organizations like ShelterCare, Laurel Hill, etc.</i> <ul style="list-style-type: none"> <li>• <b>Annual Update 12/31/17: The Rent Assistance Division has formalized several key relationships within Lane County to provide Section 8 tenant based vouchers. Through established MOUs' HACSA is able to take referrals for families seeking housing from the following agencies; First Place Family Center, Senior and Disabled Services, Options Counseling, Shelter Plus Care, Sponsors, St Vincent De Paul and Womenspace. Referrals are processed through the Rent Assistance Division's Intake Department. Qualified families are then offered a tenant based voucher as funding allows.</b></li> <li>• <b>PMD updated Senior And Disabled Services Café 60 (meal preparation) site</b></li> </ul>			

<b>agreements for both Riverview Terrace and Cresview Villa</b>			
2. Host a regular meeting with housing partners in the community focused on development, preservation and asset management.	Steve Ochs and Beth Gyde	increased real estate development coordination and asset management coordination	Quarterly
<p><i>Annual Update 12/31/16: Asset Management and Development meetings with community partners have been hosted by HACSA staff. These will be expanded and continue to be ongoing. Asset Management has met bi-monthly with other local affordable housing asset managers and development staff for roundtable discussions of issues related to best practices in operations, asset performance monitoring, and department coordination. AM is meeting monthly with other community Asset and Development staff. Attendees have steadily grown over the last year.</i></p> <p><b>Annual Update 12/31/17: Development meetings are conducted quarterly.</b></p>			
3. Research and support innovative approaches to housing design, development, maintenance, and resident services.	Steve Ochs and Mira Gattis	# of innovative approaches employed	9/30/2017
<p><i>Semi-annual update 06/28/2017: As part of the Housing Policy Board Mr. Ochs is involved in supporting innovative approaches to housing design and development. HACSA collaborates with the U of O School of Architecture to further innovative design in affordable housing.</i></p> <p><b>Annual Update 12/31/17: HACSA continues to look at innovative approaches to development by visiting numerous developments and working with a variety of partners. HACSA staff has partnered with Sponsor Inc. on a pay for success grant which started in 2017.</b></p>			
4. Expand partnerships between the Energy Services Department and the Utility Companies to better serve HACSA's multi-family housing assets	Valerie Warner and Steve Jole	increased financial contributions from utility companies	12/31/2017
<p><i>Mid-Year Update 6/30/16: HACSA was awarded the 2016 EWEB Greenpower grant for HACSA of Lance County's low-income housing project at Parkview Terrace. The total award is \$50,000. Annual Update 12/31/16: Central Lincoln PUD paid 100% of the cost to install Ductless Heat Pumps and exhaust fans in 29 units at HACSA's Laurelwood Homes complex in Florence as a special project outside of federal funding. Continue to leverage local utilities to fund special projects on HACSA complexes. Use all available grant funds from EPUD, EWEB, SUB, CLPUD and NW natural partnerships. Develop partnership with Lane Electric and Blatchly Lane co-ops for 2017. Leverage utility projects for the optimal administration fund rebates.</i></p> <p><b>Annual Update 12/31/17: All local utility funds were used to their maximum potential. Ductless heat pump fan project at Riverview Terrace to be completed January 2018 and paid 100% by leveraging DOE, LIHEAP and Pacific Power funding. Developed the partnerships with Lane Electric and Blatchly Lane for 2017. For 2018 have commitment for administration cost support from all utility providers. Started the application process of installing Ductless Heat pumps in the Munsel Park units. Project dependent on compatibility of CLPUD funding. Develop a partnership with EWEB and SUB to fund special projects on HACSA complexes.</b></p>			

<b>STRATEGIC ISSUE 4: ORGANIZATIONAL SYSTEMS</b>				
<i>Goal: Formalize and monitor organizational systems to increase effectiveness and efficiency.</i>				
<b>Objectives</b>	<b>Tasks</b>	<b>Key Leaders</b>	<b>Proposed Performance Indicators</b>	<b>Timeline</b>
<b>1. Personnel Management:</b> Improve systems to support employee development and promotion, to reduce the impact of retirement and turnover.	1. Create a standard method for onboarding new staff, promoted staff and lateral transferring staff including the transfer of knowledge between incoming and outgoing staff for all unique positions within HACSA.	Karla Ramsdal and Senior Management Team	Survey completed by HR as part of 1 <sup>st</sup> performance review to indicate whether onboarding system is effective.	12/31/2017 <b>03/31/2017</b>
	<b>Annual Update 12/31/17:</b> <ul style="list-style-type: none"> <li>• <b>Survey is in a rough draft format and is being continued to be developed.</b></li> <li>• <b>Department Orientation Event/Training</b></li> <li>• <b>The Rent Assistance Division and Public Housing Division meet on a routine (every other month) basis to discuss policies and procedures. It is the goal of this group to integrate and mirror as many policies and procedures as possible in order to have agency wide consistency and cohesiveness. Key staff, including Division Directors, Intake workers, Division Analysts and Office Assistants participate in the group.</b></li> </ul>			
	2. Update employee performance evaluation process and related documents.	Karla Ramsdal and Senior Management Team	performance evaluation process and related documents updated with Union involvement as necessary	3/30/2017
<p><i>Annual Update 12/31/16: Have had several discussions with LJM team regarding the performance evaluation process and the use of Bamboo Performance Management System. Currently all Management/Supervisors are trying it. This system asks for reviews every 3 months. First review will be due April 1, 2017.</i></p> <p><i>Semi-Annual update 06/30/17: The Leadership team completed their first quarter Performance Assessment on 03.31.17 using the HRIS software BAMBOO. The second quarter Performance Assessment for 04.01.17 – 06.30.17 is due on 07.01.17. Discussion with LJM is ongoing regarding the changeover to BAMBOO from the existing format of evaluations. Links to BAMBOO Performance Assessment were provided to the LJM committee for review and feedback.</i></p> <p><b>Annual Update 12.31.17: Process has been completed and implemented. All employees will complete a quarterly Performance Assessment (PA) via Bamboo. The first PA was sent out on 12.18.17 and will be due on 12.31.17. Per the CBA performance evaluations will be provided for less than competent performance, extraordinary merit increases and at the completion of a probationary period.</b></p>				
	3. Develop an awards system to recognize HACSA employees for key achievements and exceptional performance	Karla Ramsdal and Senior Management Team	awards are given to staff	12/31/2016
<p><i>Annual Update 12/31/16: Have had the opportunity to give out three Spotlight and three Excellence awards to EE's. Along with one Employee of the Year. Spotlight Awards are nominated by the EE's and Excellence Awards are nominated by the Manager/Supervisors. The EE of the Year is selected from the Excellence Award winners. Spotlight/Excellence Awards will be given out quarterly, while the EE of the Year will be given out in December.</i></p> <p><i>Semi-Annual update 06/31/17: We have continued the quarterly Spotlight/Excellence Awards which are used to acknowledge employees who have been nominated by their co-workers and the Leadership Team. In June we are starting a new tradition, we will be recognizing the recipients of the Excellence Awards at our HACSA Board Meetings – in addition to the</i></p>				

	<p><i>recognition during the all staff meetings.</i>  <b>Annual Update 12.31.17: The Spotlight and Excellence award program is growing and awards are enjoyed at each Agency all meeting (quarterly). We have given our second annual employee of the year award at our end of the year party.</b></p>			
	4. Identify local, state, regional and national awards and apply for them to ensure that HACSA staff is receiving the external recognition deserved.	Ela Kubok	local, state, regional awards are received	Ongoing
	<p><i>HACSA is applying for the Oregon Opportunity Network 2016 Innovator's Award for the joint partnership with University of Oregon and HACSA's real estate development department on the Hope Loop project</i>  <i>Annual Update 12/31/16: HACSA's Hope Loop project was awarded in the Golden Key, presented to honor a home ownership project that demonstrates innovation and ideas of affordability and quality design. In this project, HACSA has partnered with a design-build program at the UO, Oregon BILDS to produce seven single-family units of affordable housing.</i>  <i>Semi-Annual update 06/31/17: HACSA was awarded with Mind Your Mind at Work grant sponsored by Prevention Lane, the award recognizes employers who are champions of mental wellness at work and provide employees with resources, guidance and skills to tackle mental wellness at work.</i></p>			
<b>2. Policies and Procedures:</b> Improve communication about policies with clients and among employees.	1. Ensure all current internal policies and procedures are available and easily located on the website and/or intranet.	Karla Ramsdal and Senior Management Team	Policies and procedures are updated and widely available.	12/31/2016
	<p><i>Annual Update 12/31/16: All policies and procedures are currently on the intranet, along with being listed in Bamboo. The Personnel Policy is currently in review and expected to be reviewed and approved by legal counsel on or before 06/30/17</i></p>			
	2. Create, communicate and practice resiliency plan (i.e. emergency/crisis plan) with employees, including agency's IT section of the resiliency plan	Karla Ramsdal/Safety Committee, Wes Brumwell	resiliency plan in place	3/30/2017
	3. Secure necessary equipment to implement and support HACSA resiliency Plan (i.e. emergency/crisis plan)	Jacob Fox and Kurt von der Ehe	equipment to implement and maintain resilience plan secured	6/30/2017
	4. Improve agency procurement process by providing training, creating documentation and performing regular compliance activities	Valerie Warner and Kurt von der Ehe	Updated procurement policies in place and regular training for staff is offered	6/30/2016
	<p><i>Mid-Year Update 6/30/16: HACSA staff will participate in a Nan McKay procurement specific training in July.</i>  <i>Insurance and contractor database has been developed to aid in the procurement process.</i>  <i>Annual Update 12/31/16: Several staff members have attended procurement training in the last year:</i>  <i>3 Cap Fund staff members (Jared Young, Jay Eckert and Kurt Von der Ehe) took a training called NAHRO Procurement Training</i>  <i>2 Property Management Division staff members (Ron Haniuk and Dave Akins) took a training called Nan McKay Procurement/Section 3 Training</i>  <i>There is still work to do updating HACSA procurement information on our intranet and providing in-house training to more HACSA staff.</i>  <i>Semi-Annual Update 6/30/16: Cap fund staff and public housing staff have received updated procurement training in the last year. The CAP team has had in house training for Jay Eck, to</i></p>			

	<i>better his understanding of the Agencies Procurement Requirements. Jay Jared Teresa and Kurt have also completed Labor and Sec 3 training in the last 12 months. Other HACSA workgroups who may not have to follow HUD procurement guidance are able to follow Lane County procurement regs. HACSA's written procurement policy still needs update and we plan to budget for that task to be done by a consultant in the next fiscal year.</i>			
	5. Develop and implement a Resource Conservation plan for the Housing Division, as a pilot for the rest of the organization (leads into agency-wide plan).	Valerie Warner	resource conservation plan in place to inform budget decisions and other related decisions	12/31/2016
	<p><i>Annual Update 12/31/16:</i></p> <ul style="list-style-type: none"> <li><i>We have begun to add vehicles to the HACSA fleet which will get better gas mileage – we added a Kia hybrid for a RA inspector in FY16 – this replaced a 2004 Dodge Stratus and we have experienced approximately 9 mpg improvement</i></li> <li><i>Fleet committee monitors all fuel usage on a monthly basis and has set policy for when personal vehicle use is appropriate and when agency vehicle use is appropriate (250 miles-per-month is cutoff)</i></li> <li><i>We have removed 10 desktop printers, saving electricity and costly toner. In addition 8 printers have been identified to be removed once the toner runs out.</i></li> <li><i>We monitor water consumption to spot and repair leaks quickly. In the last year we have spotted and fixed leaks at two public housing properties.</i></li> <li><i>We also plan to install an irrigation meter at Riverview Terrace to save sewer charges on irrigation water</i></li> <li><i>We have implemented FileVision, a paperless solution for Property Management and Rent Assistance.</i></li> <li><i>We have promoted double-sided document printing agency-wide</i></li> <li><i>CapFund Dept. has streamlined processes to the fullest extent and went digital, minimizing our paper trail and saving around 120,000 sheets of paper a year.</i></li> <li><i>We have installed Ductless Heat Pumps at the following HACSA properties: Abbie Lane, Laurelwood, Maplewood Meadows, and are currently installing DHPs at Riverview Terrace</i></li> <li><i>Finance office is utilizing online payment and online cash receipt functionality to the greatest extent possible. For Rent Assistance payments, 80% are made online. For Accounts Payable, 46 vendors have signed up to receive payments online. For incoming rent, approximately 198 Public Housing rents are paid online and we are exploring additional tools to increase that number.</i></li> </ul>			
	6. Revise Personnel Policy (Employee Handbook) and Job descriptions	Karla Ramsdal	Employee handbook created and updated annually	12/31/2017
	<p><i>Annual Update 12/31/16: Extension needed – 12/31/17</i></p> <p><b><i>Annual Update 12/31/17: Personnel Policy is still in review. Current policies that are taking precedence are Dress Code and Video Surveillance System. All exempt job descriptions have been update. Update to current non-exempt job description is a continued assignment and will be updated when positions open.</i></b></p>			
<b>3. Information Technology Systems:</b> Implement information technology management system improvements and train	1. Make existing website easier to navigate, and regularly “test” information. Determine whether to migrate to another website platform	Public Relations Manager and communications committee	- Overall less click-through on website to get to the correct pages/information	12/31/2016
	<i>Annual Update 12/31/16: The communications committee has worked to improve connections and navigation of the hacsa.org website, making significant adjustments to several sub-pages, as well as developing new pages with information easier to access. This is an ongoing process.</i>			
	2. Explore other website platforms that are more user-friendly for employees.	IT		6/30/2016

employees in their use.	<p><i>Mid-Year Update 6/30/16: Starting 6/27 an IT intern will perform a comprehensive evaluation of different Housing Authorities' websites. The sample will include several housing authorities across USA, of different sizes and characteristics. The intern will prepare a final report that can guide future website decisions.</i></p> <p><i>Semi-Annual update 06/28/17: The rebranding process will include launching a new website in January 2018, research is currently performed to put together a detailed scope of work to be performed, the key goals for the new website: utility, user friendly, relevant and easy access to information, fitted with the brand.</i></p>		
3. Select specific product and implement contact management software.	Public Relations Manager and IT		12/31/2018
<b>Annual Update 12/31/2017: Currently utilizing "Mail Chimp"</b>			
4. Improve HAB utilization by convening a super user group and providing regular staff trainings	Jeff Bridgens		9/30/2016
<p><i>Annual Update 12/31/16: the members of the group have been identified and the first meeting has been scheduled for January.</i></p>			
<p><b>Annual Update 12/31/17:</b></p> <ul style="list-style-type: none"> <li><b><i>A super user group was established during 2017 and met several times to discuss experiences with HAB. The use of HAB and HAB modules varies significantly based upon each department's needs.. Smaller group meetings then occurred independently based on departmental use of the various HAB modules. HACSA also made an investment in training during 2017. HACSA utilized live, on-site training by hosting representatives from HAB to teach various aspects of HAB modules to different groups of employees based on their HAB needs. Several employees of HACSA also participated in a regional HAB training course with employees for other PHA's during October 2017.</i></b></li> <li><b>Working with HAB on Portals</b></li> </ul>			
5. Analyze whether HAB is the best long term housing software for HACSA.	Valerie Warner	Informed decision made on whether to continue with HAB or migrate to another software	9/30/2018
<b>Annual Update 12/31/17: The update is that we have delayed this task.</b>			
6. Implement paperless software Filevision.	Beth Ochs	paperless conversion complete	12/31/2016
<p><i>Annual Update 12/31/16: In September 2016 onsite training of all relevant HACSA staff was completed for the implementation of File Vision. Staff is now using paperless client files with paper files as back up. Routine quality control checks of the File Vision system will aid the agency in determining the appropriate time to fully discontinue the use of paper files.</i></p> <p><b>Update 12/31/17: The Rent Assistance Division has maintained routine quality control reviews of its paperless system. Reviews have shown the paperless system to be reliable in capturing client data. Paper files for new clients have been discontinued. Incoming paperwork for clients is kept for thirty days and then disposed of.</b></p>			
7. Investigate options for electronic timecards and implement electronic timecard system	Jeff Bridgens	electronic timecard system implemented	6/30/2017
<p><i>Semi-Annual Update 06/28/2017: Our enterprise software, HAB, does not have an electronic timecard that meets our needs at the present time. We have created an excel timecard that will speed up time entry and eliminate mathematical errors; this timecard has been provided to all HACSA staff and implementation will be rolled out methodically.</i></p> <p><b>Annual Update 12/31/17: HACSA introduced and began using electronic based time cards in excel in February 2017. To expand on this concept HACSA's Human Resource department also began pre-populating monthly timecards with holidays and weekends</b></p>			

<p><b><i>to ensure consistency across departments. These timecard templates were then posted to the agency's intra-net with instructions for employees to obtain and use. This procedure has resulted in greater uniformity in monthly time card submissions and a significant improvement to efficiency and time card accuracy.</i></b></p>			
<p>8. Identify and implement Human Resources Information System (HRIS) to track employee data (turnover, terminations, new hires, demographics, performance management. data reporting capabilities, standard and custom, applicant tracking, job and pay history, benefits management, employee self-service option, electronic form processing, training management.)</p>	<p>Karla Ramsdal</p>	<p>HRIS system implemented</p>	<p>6/30/2017 <b>Complete</b></p>
<p><i>Annual Update 12/31/16: Agency has adopted the new Human Resources Information System (HRIS) software (Bamboo). This system is being utilized at approximately 70%.</i></p>			
<p>9. Continue to expand ACH payments for landlords and vendors.</p>	<p>Jeff Bridgens</p>	<p>maintaining the % of ACH for landlords and increasing the % of ACH for vendors to 25%</p>	<p>6/30/2016</p>
<p><i>Mid-Year Update 6/30/16: This is a continuous effort of the finance department. Number of ACH payments for contractors has increased. An informative mailing to landlords has been scheduled</i></p> <p><i>Annual Update 12/31/16: Quarterly report to PMD Director on number of residents paying by ACH. Small workgroup has been created to gather and analyze information on options to increase electronic payments. Management met with PayLease to participate in a demonstration of the company's interface with both public and administrative functions. Management also will obtain a demonstration with Wells Fargo Bank to facilitate a comparative analysis. Management will evaluate these options and the implementation benefits of an ACH payment system.</i></p> <p><i>Semi-Annual Update 06/28/2017:</i></p> <ul style="list-style-type: none"> <li><i>We have not moved forward with any of the solutions we discussed in December due to time and staffing constraints. Travis Baker, HACSA's LL Liaison, plans to work with landlords to encourage additional implementation of ACH payment through conversation and newsletter in the coming quarter.</i></li> <li><i>For Accounts Payable, 114 (compared to 46 in the prior quarter) vendors have signed up to receive payments online. For incoming rent, approximately 344 (compared to 198 in the prior quarter) Public Housing rents are paid online and we are exploring additional tools to increase that number.</i></li> </ul> <p><b><i>Annual Update 12/31/2017:</i></b></p> <ul style="list-style-type: none"> <li><b><i>HACSA has continued its efforts to utilize electronic payments with landlords and vendors. HACSA has approximately 124 of its 1,471 (8%) active vendors being paid through ACH as of this update. 799 of HACSA's 895 (89%) active landlords are paid via ACH; however this figure is diminished because certain of HACSA's landlords insist on having checks printed for each of their tenants. The percentage of ACH disbursements to total disbursements annually is approximately 70%. HACSA's</i></b></li> <li><b><i>The PMD continues to track (quarterly) the number of Public and Multi-Family housing resident who pay rent by ACH, to continue to expand the number of residents using this service.</i></b></li> </ul>			



<p><b>4. Accountability Systems:</b> Create processes that increase the transparency and accountability of the organization.</p>	<p>1. Provide ongoing opportunities for clients and stakeholders to provide feedback to the organization on customer service, etc.</p>	<p>Darlene Kelly, Beth Ochs, Kurt von der Ehe, Steve Jole and Steve Ochs</p>	<p>Regular surveys are completed and changes are implemented based on feedback from these survey's</p>	<p>12/31/2016</p>
<p><i>Annual Update 12/31/16:</i> <i>In August 2016 the Lane County Rental Owner's Association membership was surveyed via Survey Monkey to gather feedback on current participation with Section 8 and what, if anything would they like to know more about. Approximately 1000 members were surveyed. 121 members responded. Of the 121 that responded 71.9% did not have a current Section 8 tenant. Many respondents stated they wanted to learn more about Section 8.</i> <i>Resident survey completed to determine current impact on special needs populations. Property Management Division providing more frequent opportunities for residents to meet with Agency leadership. PMD Customer Satisfaction Survey being completed during quality control checks on completed work orders.</i> <i>The Capital Projects team has developed a system to receive regular feedback from contractors and clients regarding service, contract award processes and billing and reviews feedback to implement changes. Other departments are in the process of implementing similar practices.</i></p> <p><b>Annual Update 12/31/17:</b></p> <ul style="list-style-type: none"> <li>• <b>The Rent Assistance Division gathers feedback from current participating landlords via the Landlord Liaison. Landlords are given opportunities via educational workshops and a dedicated landlord phone line to share concerns, ask questions, provide feedback, etc. The Rent Assistance Division will be implementing a client satisfaction survey to randomly selected clients who have recently had contact with HACSA's Rent Assistance Division staff via a Housing Quality Standards inspection or an annual income review. Surveys will be mailed to clients after the inspection or annual income review has been completed.</b></li> <li>• <b>PMD Division Director and Analyst regularly attend resident board meetings and provide training opportunities for board members. Director and Property Managers attend on site resident meetings throughout the year to hear resident concerns and answer questions. RAD and PMD analyst are working with HR to develop a complaint tracking system and form.</b></li> <li>• <b>HACSA weatherization is required by DOE to give a client satisfaction survey. This data is currently underutilized. Develop a plan to capitalize on the client data and make adjustments to procedures.</b></li> </ul>				
<p>2. Create a more informative budget document (reference the county budget document).</p> <p>Finance Manager</p> <p>HACSA budget process and document considered local best practice</p> <p>6/30/2016</p> <p><i>Mid-Year Update 6/30/16: Budget preparation timeline has been developed; a board work session dedicated to Budgets for FY17 has been scheduled for 8/31/2016. Continuous work on improving budget presentation and new document formats is being performed.</i> <b>Annual Update 12/31/2017: HACSA made substantial improvements to its budgetary process during 2017. Consistent budgeting forms were used by budget preparers and preparers received budgeting instructions by functional groups in a deliberate manner. HACSA assembled information for budget preparers to aid budget preparers with the distribution of a budget manual. The budget manual includes information about computer fees, utility costs, phone charges, maintenance contracts, fees (management, asset management &amp; bookkeeping), audit fees, fleet charges, insurance expense and other charges. Additionally, department budget templates were pre-populated with salary and fringe expense. The detailed budgets were then reviewed and the information summarized for budgetary presentation purposes. Summarized budget information was</b></p>				

<p><b>organized across HACSA's primary divisions of Rent Assistance, Housing, and Community Services for publication of HACA's budget. The Budget Document also includes information about HACSA's long-range financial planning, information about financial policies and a glossary of terms. Management will continue to make improvements to the budgetary process and budget document to provide useful and informative information about HACSA to stakeholders.</b></p>			
3. Develop a system to ensure compliance with Federal program requirements.	Valerie Warner, Jeff Bridgens	HACSA reestablishes HUD "high performer" status by 12/31/16	9/30/2016
<p><i>Annual Update 12/31/16: While an overall agency-wide system is not yet in place, the Rent Assistance Division and the Property Management Division both have quality control systems in place that includes monthly file-reviews. Each division director has a calendar with essential due dates: SEMAP, Agency Plan, REAC, etc. HACSA has reestablished HUD "high performer" status.</i></p> <p><i>Semi-Annual update 06/28/2017: Finance contracted with Casterline Associates for a review of the Agency's cost allocation plan and central office cost center methodology. Finance also implemented a tool that will track PHAS (public housing assessment system) scores throughout the year, allowing for time to make deliberate changes that will positively impact those scores.</i></p> <p><b>Annual Update 12/31/2017: Finance worked with Casterline Associates to review its cost allocation plan and central office cost center methodology. Changes in Financial Management and Reporting for Public Housing Agencies under the Net Operating Fund Rule (24 CFR part 990) was reviewed extensively to identify appropriate cost models and to better define front-line program costs and overhead costs. The result of these efforts was a documented cost allocation plan for HACSA that is designed to help ensure compliance with HUD models. Finance has started a process to assess and document the agency's key internal controls with regard to both financial information and federal practice. A documented risk assessment will aid management in evaluating the processes and procedures utilized at HACSA.</b></p>			

4. Issue monthly budget vs actual reports in electronic format for all HACSA cost centers	Jeff Bridgens	Reports allow for HACSA leadership to communicate financial position of agency to board more frequent than annual budget approvals	ongoing
<p><i>Annual Update 12/31/16: The Finance Staff is in the process of uploading project based annual budgets to HAB (Management Software) and carefully reviewing and editing the budget report template set-ups within HAB to ensure complete and accurate reports are generated. We anticipate providing budget based reports, by project, to management teams beginning in the first quarter of calendar year 2017. In addition, management also intends to craft and tailor high level reporting for the Board to monitor year-to-date operations.</i></p> <p><i>Semi-Annual Update 06/28/2017: We have issued budget to actuals on the HACSA intranet for the last 4 months</i></p>			
5. Develop and implement a Data Dashboard for HACSA including all appropriate performance indicators	Jacob Fox and Valerie Warner	Board and leadership monitor performance throughout the year	12/31/2016
<p><i>Annual Update 12/31/16: Key performance indicators (KPI) are complete for the Rent Assistance Division. All other Divisions are actively working on developing their key performance indicators. The goal is to have a KPI dashboard complete by the April, 2017 HACSA Board meeting.</i></p>			

	6. Evaluate and possibly implement a corporate p-card (purchasing card) program for HACSA	Jeff Bridgens	P-card program evaluated	12/31/2017
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