

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

Annual Implementation Review



Strategic Plan Matrix with progress report

STRATEGIC ISSUE 1: COMMUNITY ENGAGEMENT				
<i>Goal: Increase HACSA's ability to lead and facilitate conversations about affordable housing opportunities and challenges in the local community.</i>				
Objectives	Tasks	Responsible Leaders	Proposed Performance Indicators	Timeline
1. Communications Capacity: 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.	6/30/2016
	<i>6/30/16 Mid-Year Update: 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>			
	<i>12/31/16 Annual Update: 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</i>			
	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>12/31/16 Annual Update: 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>			
3. Develop template presentations with information about departments, programs, and the organization.	Communications Coordinator and/or key managers	template presentations completed and updated as needed	12/31/2016	
<i>12/31/16 Annual Update: 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>				
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>6/30/16 Mid-Year Update: 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>				
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>6/30/16 Mid-Year Update: Communications committee has been troubleshooting links and website connections, and will continuously monitors for such errors.</i>				

	6. Develop strong media relationships including culturally specific media outlets and maximize positive media opportunities.	Communications Coordinator and/or key managers	# of positive media reports; # of mentions of HACSA in related reports	3/31/2017
	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.	Communications Coordinator and/or key managers	# of stakeholders increased plugged in for info updates	6/30/2016
6/30/16 Mid-Year Update: This item will be included in the communications plan.				
2. Community Education: 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
	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.			
	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
	12/31/16 Annual Update: 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.			
	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
12/31/16 Annual Update: 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.				

	4. Conduct routine landlord communications and periodic meetings to update and clarify information specific to the Rent Assistance Division	Beth Ochs and Communications Coordinator	50% increase in proactive communication to LL's	6/30/2016, ongoing
	<p><i>6/30/16 Mid-Year Update: 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>12/31/16 Annual Update: 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.</p>			
	5. Conduct periodic HACSA contractor communications to update and clarify information specific to contracting opportunities and requirements for HACSA contractors.	Communications Coordinator, Steve Ochs and Kurt von der Ehe	50% increase in proactive communication to contractors	TBD
3. Political Advocacy: Advocate for the expansion of funding opportunities for low-income housing development, housing preservation and resident services.	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>12/31/16 Annual Update: 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 advocacy efforts and we are often contacted to advocate for various housing and human services initiatives.</p>			
	2. Assign senior managers to advocacy opportunities; track opportunities and contacts with decision makers and other housing advocates.	Jacob Fox	# of communications with decision-makers	12/31/2016
<p>12/31/16 Annual Update: 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.</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>6/30/16 Mid-Year Update: 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>12/31/16 Annual Update: 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.</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>6/30/16 Mid-Year Update: The list has been created and contacts are being maintained.</p>				
<p>4. Branding: Increase brand recognition to promote a positive and consistent image of the organization to internal and external stakeholders.</p>	1. Facilitate (or hire a facilitator) to baseline current HACSA brand and to develop strategies to improve the HACSA brand.	Communications Coordinator and/or key managers		3/30/2017
	2. Review and update HACSA's mission and values	Communications Coordinator 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 Communications Coordinator		TDB
	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	Communications Coordinator and/or key managers		12/31/2016

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			
6. Create branding manual and downloadable resources for employees to ensure consistent communications.	Communications Coordinator and/or key managers		6/30/2017

STRATEGIC ISSUE 2: SERVICE DELIVERY

Goal: Provide employees with support to improve customer service outcomes.

Objectives	Tasks	Key Leaders	Proposed Performance Indicators	Timeline
1. Staff Training: Expand opportunities for staff to gain necessary knowledge and skills to carry out their positions could be offered. Publish a list of successfully.	1. Provide trainings in: customer service skills; meeting the needs of clients with unique or marginalized needs; de-escalation.	Karla Ramsdal	Pre training survey completed to baseline knowledge of key issues and specific training requests. Post training evaluations completed and analyzed to ensure trainings are providing intended improvements in knowledge.	Initial trainings complete by 9/30/16 and annual refreshers in 2017 and 2018
	12/31/16 Annual Update: 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.			
	2. Create a system to periodically seek feedback from staff to determine what other trainings and skill development are needed for effective service delivery.	Karla Ramsdal	training and skill development opportunities are developed based on input from staff	6/30/2016
	<i>6/30/16 Mid-Year Update: Due to protracted contract bargaining with AFSCME Local3267 this item was put on hold, due date changed to 12/31/2016</i> 12/31/16 Annual Update: 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.			
	3. Research and create an inventory of possible trainings and services that are available for internal and external training opportunities.	Karla Ramsdal		3/30/2017

	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>6/30/16 Mid-Year Update: 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>12/31/16 Annual Update: 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. Ongoing</p>				
2. Service Accessibility: Help underserved clients enter programs that meet their needs, and decrease clients' barriers to accessing HACSA services.	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
	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>12/31/16 Annual Update: 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 3/60/2017</p>				
	3. Establish and advertise a process for providing interpretation services.	Christi Champ and Jill Fields	survey non-English speaking residents/participants to determine satisfaction with HACSA's efforts	3/30/2017
	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>6/30/16 Mid-Year Update: 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>12/31/16 Annual Update: 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.</p>				
<p><i>Goal: Increase client self-sufficiency and units/vouchers dedicated to special needs populations</i></p>				
Objectives	Tasks	Key Leaders	Proposed Performance Indicators	Timeline
1. Client Self-Sufficiency: Create and expand programs	1. Expand Family Self-Sufficiency program to include more clients.	Mira Gattis, Beth Gydé	# of additional clients	ongoing
	<p>12/31/16 Annual Update: FSS recently made a program change so that FSS</p>			

that develop the self-sufficiency of clients, in order to better serve waitlisted people and underserved clients.	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.			
	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
	6/30/16 Mid-Year Update: Staff is in the process of crosschecking provider links, to assure relevance and validity.			
	3. Create and incentivize community-building opportunities for HACSA residents across various properties and programs.	Mira Gattis	# of events /opportunities	6/30/2016, ongoing
	<i>6/30/16 Mid-Year Update: 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> 12/31/16 Annual Update: 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.			
	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
<i>6/30/16 Mid-Year Update: 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> 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. 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, Columbia Care at Heeran Center) and formalize existing partnerships.				
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
	6/30/16 Mid-Year Update: 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.			

	3. 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
12/31/16 Annual Update: 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.				
	4. 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
	5. 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
6/30/16 Mid-Year Update: Madrone Continuum of Care Grant: \$435,333.00 per year Pay For Success Grant: \$ 1.3 million for three years IGA for Housing First Project: \$50,000				
	6. 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
1. Funding Streams: Build the organization's ability to seek diverse revenue sources.	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
	6/30/16 Mid-Year Update: Staff has secured a cell phone tower on Parkview Terrace roof and continues to look for other innovative funding streams. HACSA is a recipient of \$50,000 from EWEB through the 2016 Greenpower grant for solar panels at Parkview Terrace, which will lead to significant decrease in utility expenses over time.			
	2. Document successes from existing programs and partnerships, to increase HACSA's attractiveness to major grantors.	Communications Officer and Mira Gattis	increased coverage for HACSA successes in the local media	12/31/2016, ongoing
12/31/16 Annual Update: Photos have been taken at all major events organized, a big event 100th 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 is currently in the works of being established.			
	3. Formalize Cornerstone partnership for grant-writing and fundraising skill-sharing.	Jacob Fox and Mira Gattis	increased funding available for resident services	3/31/2016
	12/31/16 Annual Update: There have been and continue to be numerous partnerships between Cornerstone and HACSA. Rather than a macro partnership at this time HACSA and Cornerstone are developing partnerships on a transactional basis. For example, HACSA and Cornerstone developed a Resident Services Plan for HACSA's Richardson Bridge rehabilitation project that was approved by the State of Oregon, which will compensate Cornerstone for providing resident services at this apartment community.			
	4. 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
	12/31/16 Annual Update: 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.			
2. Asset Preservation: Maintain and upgrade existing properties in order to reduce long-term costs.	1. Develop comprehensive asset preservation plan and corresponding presentation for elected officials and senior leadership from the jurisdictions	Steve Ochs, Darlene Kelly and Beth Gyde	necessary support is achieved from the local jurisdictions	12/31/2016
	12/31/16 Annual Update: 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)			
	2. Develop 5 year capital improvement plan for all HACSA affordable housing assets	Beth Gyde and Kurt von der Ehe	HACSA knows what capital projects are happening when over the next 5 years	9/30/2016
	12/31/16 Annual Update: 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.			
	3. Determine HACSA's total square footage needs and parking needs and assess whether there are any existing buildings that could be acquired and renovated to meet HACSA's administrative office needs.	Ela Kubok	HACSA is able to make decision on whether to purchase an existing property or build a new administrative building	6/30/2016
6/30/16 Mid-Year Update: The initial space report has been prepared by PIVOT Architecture. The report can guide the decision making. The Real Estate Broker RFP will be published in July 2016.				

4. Market Day Island, 48th and Main and the River Road sites and maximize return on the sale of these properties.	Jacob Fox and Steve Ochs	HACSA has the proceeds necessary to acquire a new administrative building and the remainder of the funds will be used for preservation	6/30/2017
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.	12/31/2018
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>6/30/16 Mid-Year Update: 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>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.</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>6/30/16 Mid-Year Update: Preliminary financial structure for Richardson Bridge rehabilitation, as well as Sheldon Village I and II has been completed.</i></p> <p>12/31/16 Annual Update:</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
9. Secure consultant to 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 minimizing landscaping costs on existing properties.	Valerie Warner	cost saving measures implemented	3/31/2016, ongoing
<p><i>6/30/16 Mid-Year Update: HACSA is currently monitoring utility bills to catch and address water leaks. The Agency was able to redeem \$2500 from EWEB.</i></p> <p>12/31/16 Annual Update: 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.</p>			

	11. Develop a funding strategy for capital needs at Firwood (carried over from 2015 strategic plan)	Darlene Kelly and Jeff Bridgens	Firwood has funding for capital needs improvements	6/30/2016
	<i>6/30/16 Mid-Year Update: A contractor to perform the capital needs assessment has been secured. This is a first step to developing a comprehensive funding needs estimate.</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.			
	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
	6/30/16 Mid-Year Update: The Property Management Division is implementing preventive maintenance inspections on July 1st. Each Property Manager will turn them in monthly, one per complex with their timecard, starting with their July timecard.			
3. New Development: Increase number of affordable housing units available to Lane County Residents.	1. Complete construction of Bascom Village	Steve Ochs, Kurt von der Ehe and Beth Gyde	Project is successfully leased up with new residents	12/31/2016
	<i>6/30/16 Mid-Year Update: The completion date is set for November 2016; construction is currently almost at 70% of completion.</i> 12/31/16 Annual Update: Construction was completed in November 2016. A grand opening was held are scheduled to be leased by January 2017.			
	2. Complete construction of the Oaks at 14th	Steve Ochs, Beth Gyde and Kurt von der Ehe	Project is successfully leased up with new residents	9/30/2017
	<i>6/30/16 Mid-Year Update: HACSA broke ground on the project in early May, the official ground breaking ceremony was held 6/17/2016. A construction monitoring camera system has been set up to follow the process.</i> 12/31/16 Annual Update: Construction at the Oaks at 14th is at 70% completion with lease up expected to be completed by mid-March 2017.			
	3. 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
	4. 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
	5. Develop Project Based Section 8 program to support new developments and existing projects for special needs populations.	Steve Ochs and Beth Ochs	Project Based Section 8 program exists with specific special needs population targets.	9/30/2017
	6. 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
4. Innovative Partnerships: Continue to develop and	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

formalize service partnerships to increase efficiency, social equity, and effectiveness.	12/31/16 Annual Update: 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.			
	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
	12/31/16 Annual Update: 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 meet 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.			
	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
	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
6/30/16 Mid-Year Update: 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. 12/31/16 Annual Update: Central Lincoln PUD paid 100% of the cost to install Ductless Heat Pumps and exhaust fans in 29 units at HACSAs' 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.				

STRATEGIC ISSUE 4: ORGANIZATIONAL SYSTEMS

Goal: Formalize and monitor organizational systems to increase effectiveness and efficiency.

Objectives	Tasks	Key Leaders	Proposed Performance Indicators	Timeline
1. Personnel Management: 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 1st performance review to indicate whether onboarding system is effective.	12/31/2017
	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

	12/31/16 Annual Update: 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			
	3. Develop a 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
	12/31/16 Annual Update: 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.			
	4. Identify local, state, regional and national awards and apply for them to ensure that HACSA staff is receiving the external recognition deserved.	Communications Coordinator and Karla Ramsdal	local, state, regional awards are received	Ongoing
	<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> 12/31/16 Annual Update: 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.			
2. Policies and Procedures: 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
	12/31/16 Annual Update: 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			
	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
	<i>6/30/16 Mid-Year Update: 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> 12/31/16 Annual Update: Several staff members have attended procurement training in the last year: 3 Cap Fund staff members (Jared Young, Jay Eckert and Kurt Von der Ehe) took a training called NAHRO Procurement Training			

	2 Property Management Division staff members (Ron Haniuk and Dave Akins) took a training called Nan McKay Procurement/Section 3 Training There is still work to do updating HACSA procurement information on our intranet and providing in-house training to more HACSA staff.			
	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>12/31/16 Annual Update:</p> <ul style="list-style-type: none"> 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 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) 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. 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. We also plan to install an irrigation meter at Riverview Terrace to save sewer charges on irrigation water We have implemented FileVision, a paperless solution for Property Management and Rent Assistance. We have promoted double-sided document printing agency-wide 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. We have installed Ductless Heat Pumps at the following HACSA properties: Abbie Lane, Laurelwood, Maplewood Meadows, and are currently installing DHPs at Riverview Terrace 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. 			
	6. Revise Personnel Policy (Employee Handbook) and Job descriptions	Karla Ramsdal	Employee handbook created and updated annually	12/31/2016
	12/31/16 Annual Update: Extension needed – 06/30/17			
3. Information Technology Systems: Implement information technology management system improvements and train employees in their use.	1. Make existing website easier to navigate, and regularly "test" information. Determine whether to migrate to another website platform	Communications coordinator and communications committee	- Overall less click-through on website to get to the correct pages/information	12/31/2016
	12/31/16 Annual Update: 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.			
	2. Explore other website platforms that are more user-friendly for employees.	IT		6/30/2016
	6/30/16 Mid-Year Update: 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.			

	3. Select specific product and implement contact management software.	Communications Coordinator and IT		12/31/2016
	4. Improve HAB utilization by convening a super user group and providing regular staff trainings	Jill Fields		9/30/2016
12/31/16 Annual Update: the members of the group have been identified and the first meeting has been scheduled for January.				
	5. Analyze whether HAB is the best long term housing software for HACSA.	Valerie Warner and Jill Fields	Informed decision made on whether to continue with HAB or migrate to another software	9/30/2018
	6. Implement paperless software Filevision.	Beth Ochs, Jill Fields, IT	paperless conversion complete	12/31/2016
12/31/16 Annual Update: 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.				
	7. Investigate options for electronic timecards and implement electronic timecard system	Jeff Bridgens	electronic timecard system implemented	6/30/2017
	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.)	Karla Ramsdal	HRIS system implemented	6/30/2017
12/31/16 Annual Update: Agency has adopted the new Human Resources Information System (HRIS) software (Bamboo). This system is being utilized at approximately 70%.				
	9. Continue to expand ACH payments for landlords and vendors.	Jeff Bridgens	maintaining the % of ACH for landlords and increasing the % of ACH for vendors to 25%	6/30/2016
<p><i>6/30/16 Mid-Year Update: 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>12/31/16 Annual Update: 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.</p>				

4. Accountability Systems: Create processes that increase the transparency and accountability of the organization.	1. Provide ongoing opportunities for clients and stakeholders to provide feedback to the organization on customer service, etc.	Darlene Kelly, Beth Ochs, Kurt von der Ehe, Steve Jole and Steve Ochs	Regular surveys are completed and changes are implemented based on feedback from these survey's	12/31/2016
	12/31/16 Annual Update: <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>			
	2. Create a more informative budget document (reference the county budget document).	Finance Manager	HACSA budget process and document considered local best practice	6/30/2016
	6/30/16 Mid-Year Update: <i>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>			
	3. Develop a system to ensure compliance with Federal program requirements.	Valerie Warner	HACSA reestablishes HUD "high performer" status by 12/31/16	9/30/2016
	12/31/16 Annual Update: <i>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>			
	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	11/30/2016
12/31/16 Annual Update: <i>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>				
5. Develop and implement a Data Dashboard for HACSA including all appropriate performance indicators	Jacob Fox and Valerie Warner	Board and leadership monitor performance	12/31/2016	

			throughout the year	
	12/31/16 Annual Update: 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.			
	6. Evaluate and possibly implement a corporate p-card (purchasing card) program for HACSA	Jeff Bridgens	P-card program evaluated	12/31/2016
	12/31/16 Annual Update: Extension requested			