



STRATEGIC PLAN DELIVERABLES

Reporting Key

Green = Initiatives that are Completed and On Track

Yellow = Initiatives that have been Delayed

Red = Initiatives that have been Cancelled

Uncoded = Initiatives not in this reporting timeframe, April 2016 – July 2017

one portfolio: Our real estate is stable for generations to come and meets the needs of the people and neighborhoods it serves.

Initiative: Develop a housing strategy that informs how we acquire, rehab and develop new properties.		Status Update December 2016
<p>Create a plan that illustrates housing type, location and population-based priorities, and allows for opportunity-driven pursuits, with the goal of adding 500 affordable housing units to Home Forward’s portfolio by 2020.</p>	<p><i>Deliverable and timeline: A written plan is adopted by the board in February 2017.</i></p>	<p>Initial meetings were held on this topic and will resume after the new year. We anticipate a later request for board adoption in the spring. (Delayed, May 2017)</p>
Initiative: Complete our 85 Stories initiative and convert our public housing portfolio to a Section 8-based subsidy stream, performing critical rehab where needed.		Status Update December 2016
<p>Complete our first RAD subsidy conversion.</p>	<p><i>Deliverable and timeline: The six identified properties in our RAD application have been successfully converted to Section 8 funding by November 2016.</i></p>	<p>Work to close the first phase of RAD is ongoing, resolution of Attachment A with HUD is the next step. (Delayed, January 2017)</p>
<p>Complete our second RAD and / or Section 18 conversion for the rest of our public housing properties.</p>	<p><i>Deliverable and timeline: All remaining properties are converted by December 2020.</i></p>	<p>Status updates will be available in 2019 or when significant progress has occurred.</p>
<p>Complete or have work substantially underway to rehabilitate the remaining six public housing high rises in the 85 Stories initiative.</p>	<p><i>Deliverable and timeline: Construction is completed or substantially underway by December 2020.</i></p>	<p>Status updates will be available in 2019 or when significant progress has occurred.</p>
<p>Six properties currently held in tax credit partnerships in our portfolio are transitioned to Home Forward ownership.</p>	<p><i>Deliverable and timeline: All six properties are owned by Home Forward, and refinanced / recapitalized as needed by December 2020.</i></p>	<p>Status updates will be available in 2019 or when significant progress has occurred.</p>
Initiative: Fully institute an asset management model for our entire real estate portfolio and develop shared performance measures for all our properties.		Status Update December 2016
<p>An additional asset manager position will be added and all properties in the Home Forward portfolio will be assigned to an asset manager.</p>	<p><i>Deliverables and timeline: The asset manager will be hired and property assignments made by September 2016.</i></p>	<p>The position was filled and now every asset in our portfolio has an associate or asset manager assigned to it. (Completed)</p>
<p>Develop and implement performance standards and consistent practices for the entire portfolio.</p>	<p><i>Deliverables and timeline: All properties will be evaluated and results reported annually, based on benchmark analyses, beginning in December 2016.</i></p>	<p>Performance standards have been established and have been applied to all property management companies, including Home Forward’s property management team. (Completed)</p>

one resource: There are deeper connections and continuity between the types of housing assistance we provide that allow us to meet the evolving needs of the people we serve.

Initiative: Make changes to the way we manage our waiting lists so we respond to the needs of the community in the current housing market.		Status Update December 2016
<p>Create a system to allow Housing Choice Voucher applicants who were unable to lease up access to public housing and project-based voucher waiting lists.</p> <p>Improve outreach to the community and restructure waiting list preferences to ensure program access mirrors the population and needs of people in poverty.</p>	<p><i>Deliverable and timeline: The new system is implemented and access is available to applicable voucher applicants by December 2017.</i></p> <p><i>Deliverable and timeline: Waitlist preferences and outreach plan are implemented, and staff are cross-trained across all programs to answer basic questions about access to waiting lists by April 2017.</i></p>	<p>Status updates will be available in 2017 or when significant progress has occurred.</p> <p>Accelerated RAD planning necessitated capacity but foundational work is occurring with a new timeline. (Delayed, October 2017)</p>
Initiative: Create new pathways that allow people to move between our housing assistance programs in ways that better meet their needs.		Status Update December 2016
<p>Establish a policy that allows mobility between RAD project-based voucher sites and the Housing Choice Voucher programs.</p> <p>Expand transfer options for domestic violence survivors who are living in subsidized units by creating a set-aside in the Housing Choice Voucher program.</p> <p>Conduct an impact analysis of the RAD mobility policy (above) to determine the potential for expansion to include all Home Forward-owned project-based voucher sites.</p>	<p><i>Deliverable and timeline: The policy is implemented by December 2016.</i></p> <p><i>Deliverable and timeline: Transfer options are available to all survivors regardless of the subsidy they receive by June 2017.</i></p> <p><i>Deliverable and timeline: Impact analysis will be completed by January 2020, with a go / no-go recommendation to expand the mobility policy by March 2020.</i></p>	<p>The policy was established in April 2016 and was implemented in December 2016. (Completed)</p> <p>Internal and external workgroups have been working to right-size the set-aside policy. (On Track)</p> <p>Status updates will be available in 2019 or when significant progress has occurred.</p>
Initiative: Explore a new model of service delivery that puts more of our staff in the neighborhoods we serve.		Status Update December 2016
<p>Design a neighborhood-based service delivery model and pilot it at two locations.</p> <p>Assess the success of the model and make a recommendation to continue as-is, expand to additional sites, or discontinue.</p>	<p><i>Deliverables and timeline: Model design will be completed by June 2017; the first site will be active by November 2017 and the second by April 2018.</i></p> <p><i>Deliverables and timeline: Outcomes (to be determined) and survey results from staff and customers will be completed, and a recommendation made by December 2020.</i></p>	<p>A planning group quickly realized creating a sustainable model that truly meets the needs of our community will take more time. We are consulting with the Urban Institute and will convene a project team in spring 2017. (On Track)</p> <p>Status updates will be available in 2019 or when significant progress has occurred.</p>

one agency: We build our skills and work together in ways that help us constantly evolve and improve our ability to serve our community.

<p>Initiative: Proactively plan and prepare staff for the significant organizational implications of converting our public housing portfolio to a Section-8 based platform.</p>	<p>Status Update December 2016</p>
<p>Define new requirements, create a specific training plan for departments impacted by the RAD conversions, and deliver the training.</p>	<p><i>Deliverable and timeline: Training plan and materials developed by October 2016; staff impacted by the first RAD conversion are trained by November 2016. Remaining staff will be trained four months prior to the second RAD conversion (timeline TBD based on RAD II conversion).</i></p> <p>Training plan has been developed and staff involved in the first RAD conversion have been trained. We are prepared for the second phase of RAD. (On Track)</p>
<p>Initiative: Deepen our communication efforts to better engage and inform our internal and external stakeholders.</p>	<p>Status Update December 2016</p>
<p>Create and implement a values-based communications plan that addresses internal and external strategies.</p> <p>Develop a set of recommendations related to resource development, including proposed roles for current and former board members to assist in cultivating relationships and opportunities to bring resources to support the work of Home Forward.</p> <p>Increase the use of surveys, focus groups and other forms of outreach to get resident input on program development and feedback on our service delivery.</p>	<p><i>Deliverable and timeline: A communications plan that has been informed by the Resident Advisory Committee, the board, partners and staff will be in place by January 2017.</i></p> <p><i>Deliverable and timeline: Recommendations will be delivered to the board of commissioners by July 2016 and the board of directors for Home Forward Community Partnerships by August 2016. Next steps, deliverables and timelines will be further defined then.</i></p> <p><i>Deliverable and timeline: Priorities for input related to the strategic plan in year one and the methods to get it will be determined by March 2017.</i></p> <p>The framework of a communications plan is being developed and has been informed by the RAC and staff. (On Track)</p> <p>Resource development recommendations were delivered and approved by the boards of Home Forward and Home Forward Community Partnerships. (Completed)</p> <p>85 Stories and school attendance outreach has concluded, digital inclusion, service delivery and food security outreach is being conducted. (On Track)</p>
<p>Initiative: Train for and implement additional trauma-informed practices.</p>	<p>Status Update December 2016</p>
<p>Conduct an assessment of current Home Forward practices (e.g, terminations, rent increases, inspections) to identify opportunities to integrate trauma-informed training and practices.</p> <p>Begin introductory training and program-specific training for staff.</p>	<p><i>Deliverables and timeline: Specific practice(s) to be addressed initially will be identified by January 2017, with ongoing assessment and additional areas identified annually thereafter.</i></p> <p><i>Deliverables and timeline: Introductory training will begin in February 2017 and program-specific training will begin in July 2017.</i></p> <p>A broad team has convened and has been trained, research is taking place and assessments are forthcoming. (On Track)</p> <p>Four introductory training sessions have been completed, department specific trainings are being developed. (On Track)</p>
<p>Initiative: Increase hard skills training and leadership development for staff at all levels of the agency.</p>	<p>Status Update December 2016</p>
<p>Create and implement need-based YARDI training throughout the agency.</p> <p>Conduct a needs assessment to determine critical needs by department and at the agency level. Develop a plan for trainings to roll out over the life of the strategic plan.</p> <p>Create a leadership development program that includes a supervisory training component.</p>	<p><i>Deliverables and timeline: Training will be developed and begin by April 2017.</i></p> <p><i>Deliverables and timeline: Assessment will be completed by December 2016. A calendar / plan for trainings through 2020 will be completed and the first trainings will begin by April 2017.</i></p> <p><i>Deliverables and timeline: The program will be developed and training will begin in January 2017.</i></p> <p>Future Yardi upgrade delayed training. (Delayed, March 2018)</p> <p>Agency wide trainings took precedence in 2016, department focused needs assessments will be completed mid-2017. (Delayed, June 2017)</p> <p>Program design has been completed and candidates will be recruited in January. (On Track)</p>

one community: The people we serve, our partners and the public see us as open, supportive and responsive to their needs, even when our resources are constrained.

<p>Initiative: Define and implement our equity platform, with a particular emphasis on racial justice.</p>	<p>Status Update December 2016</p>	
<p>Complete foundational work, including an agency definition and vision for the work, and an organizational assessment to identify key areas to prioritize.</p> <p>Identify equity-specific training needs and integrate them into the development of the agency-wide training calendar.</p> <p>Identify opportunities and set goals to increase participation of Minority, Women, Small and Emerging Businesses (MWESB) in our contracting processes.</p>	<p>Deliverable and timeline: <i>Foundational work completed by December 2016.</i></p> <p>Deliverable and timeline: <i>A calendar / plan for trainings through 2020 will be completed and the first trainings will begin by April 2017.</i></p> <p>Deliverable and timeline: <i>A strategy and goals will be developed by December 2016.</i></p>	<p>An organizational assessment has been completed and a framework for an equity plan has been drafted. More fundamental work will be completed by spring 2017. (Delayed, May 2017)</p> <p>The training calendar is being developed and the first trainings have been identified. (On Track)</p> <p>Goals have been drafted as part of the equity planning process, but not yet finalized. (Delayed, March 2017)</p>
<p>Initiative: Optimize our use of technology to increase the community's ability to interact and transact with us, and work to increase resident access to technology.</p>	<p>Status Update December 2016</p>	
<p>Implement new / upgrade existing technologies that improve business operations.</p> <p>Re-evaluate IT business practices and workflows to better customize tools and applications.</p> <p>Develop web-based portals that allow landlords and participants to conduct business with us electronically.</p> <p>Assess need and develop a plan to further address the digital divide for our participants.</p>	<p>Deliverable and timeline: <i>A schedule of technology rollouts will be completed in May 2016, beginning with the roll out of Windows 10 in October 2016.</i></p> <p>Deliverable and timeline: <i>A governance group will be created in August 2016, in order to identify cross-agency process and systems improvements. Next steps and timelines will be created then.</i></p> <p>Deliverable and timeline: <i>A landlord portal will go live in December 2017 and a participant portal will go live in December 2018.</i></p> <p>Deliverable and timeline: <i>Conduct needs assessment by December 2016 and develop an action plan by July 2017.</i></p>	<p>The schedule was developed, Windows 10 and a cutting edge data storage system have been implemented. (Completed)</p> <p>The governance group has been developed and is working to set direction and priorities, develop policies and procedures, and to implement IT tools and applications. (Completed)</p> <p>Status updates will be available in 2017 or when significant progress has occurred.</p> <p>Needs assessment has been completed and partnerships have been developed to inform an implementation plan. (On Track)</p>
<p>Initiative: We will deepen our focus on supporting the needs of East County.</p>	<p>Status Update December 2016</p>	
<p>Ensure that key strategic plan initiatives, such as the housing strategy, neighborhood-based service delivery pilots and equity planning all specifically speak to meeting the needs of East County.</p> <p>Pilot one or more rent assistance programs that support East County residents and further our systems alignment goals.</p>	<p>Deliverables and timeline: <i>Plans and timelines as described in the specified initiative areas.</i></p> <p>Deliverables and timeline: <i>A program will be in place to support families of the Earl Boyles Elementary School by September 2016 and an additional pilot program will be planned by December 2016.</i></p>	<p>Status updates will be available periodically when other initiatives are completed.</p> <p>Earl Boyles program has launched and an additional pilot has been identified and is being explored. (On Track)</p>

one system: We leverage our role as the largest provider of affordable housing in Oregon to improve collaboration and efficacy between systems impacting people in poverty.

Initiative: Fully support the A Home For Everyone effort to address homelessness.		Status Update December 2016
Continue full engagement in the Executive and Coordinating boards and fully implement Home Forward-specific commitments that are underway.	Deliverable and timeline: <i>Housing choice voucher preferences adopted to serve homeless populations will be extended and fully utilized by July 2017.</i>	Staff are fully engaged and participating on various boards. Homeless preferences have been implemented, evaluation and reporting will occur soon. (On Track)
Develop a housing stability plan in collaboration with partners to better ensure ongoing success of people exiting homelessness with our housing resources.	Deliverable and timeline: <i>Plan and retention goals will be developed by July 2017.</i>	Plan and retention goals have been developed and we are shifting from lease-up efforts to retention support. (On Track)
Work with partners to identify ways to use our housing resources to support new Permanent Supportive Housing for people with severe and persistent mental illness.	Deliverable and timeline: <i>Identify the resource commitments to support new Permanent Supportive Housing by July 2017.</i>	Partnerships have been developed and resource commitments are being evaluated. (On Track)
Initiative: Strengthen our engagement with the education and health care systems.		Status Update December 2016
Develop a campaign to improve K-12 school attendance for Home Forward families.	Deliverable and timeline: <i>Campaign will be launched in 2016 and assessed in July 2017, then every year thereafter, modifying based on lessons learned.</i>	A collaboration of community partners have developed a campaign and messaging will go out to families in December 2016. (On Track)
Leverage Home Forward processes such as program briefings, as well as other strategic plan initiatives, such as neighborhood-based service delivery and rent assistance pilot programs, to advance educational partnerships, with an emphasis on connecting families to early childhood resources.	Deliverable and timeline: <i>A suite of coordinated efforts will be in place by December 2017.</i>	Status updates will be available in 2017 or when significant progress has occurred.
Develop partnerships that increase access to healthcare and related services, in coordination with other strategic plan efforts, including Permanent Supportive Housing, neighborhood service delivery model, and housing strategy.	Deliverable and timeline: <i>An update on health-related initiatives will be given to the board in July 2017.</i>	We are working with Wallace Medical Concern, Care Oregon, PSU and many others to develop funding and programming to support the overall health of the people we serve. (On Track)
Initiative: We will work tirelessly to add more affordable housing in our community, regardless of our role or ownership stake, in alignment with other systems of care.		Status Update December 2016
Continue to work with our jurisdictions, delegations and advocacy groups to shape policy and develop tools to create more affordable housing resources.	Deliverables and timeline: <i>Periodic updates will be given to the Real Estate and Development Committee and the full board on our involvement and specific progress.</i>	A \$258.4 million General Obligation Bond was passed by Portland voters in November 2016. Home Forward will work with the Portland Housing Bureau and the Welcome Home Coalition to create 1,300 affordable homes. (On Track)