

**Piedmont Housing Alliance Strategic and
Operational Plan
2018-2021**

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Introduction

Piedmont Housing Alliance has been a leader in developing and managing safe and affordable homes, providing education and counseling to prospective homeowners, and financing affordable housing in the Charlottesville area since 1983. The organization's continuum of services provides multiple ways for low and moderate income families to find, afford, and settle in a home of their own. In 2017, the organization was able to serve more than 1,000 households, yet this number represents only a fraction of the need.

In late 2017, to consider ways to expand their reach, address the growing inequities and affordable housing needs in the region, and support a common sense of purpose, the Piedmont Housing Alliance Board and staff members engaged in an organization-wide process to recalibrate their 2014–2017 strategic plan. The Board and new executive director of Piedmont Housing Alliance sought to affirm a strategic direction for the next three years and craft a detailed one-year work plan to ground resulting goals in day-to-day operations. To do this required deep engagement of staff and Board members working together across business lines through an interactive and inclusive process.

This report summarizes the goals and strategies that Piedmont Housing Alliance has adopted, as well as the updated vision, mission, and core values that define the work ahead.

Mission and Core Values

At an April 2018 retreat, Board and staff members adjusted the organization's mission and values to reflect the organization's commitment to promoting equity and housing affordability in the community. The updated mission is:

“Piedmont Housing Alliance creates affordable housing opportunities and fosters community through education, lending, and equitable development.”

The **values** guiding Piedmont Housing's work are:

- **Equity.** Race, culture, and ethnicity must not be predictive of life outcomes.
- **Opportunity.** Housing opportunity is the foundation for individuals and families in reaching their goals.
- **Home.** Everyone deserves a place to call home.
- **Community.** Working together fosters and supports strong, inclusive, and vibrant communities.
- **Respect.** All people deserve to be treated with compassion and respect.

Goals and Strategies

Goal One: Rental Housing

Goal One: Create affordable, high-quality, well-maintained rental home communities where residents are supported to achieve their goals.

Since 2014, Piedmont Housing has significantly expanded its building and management of apartment homes for low- and moderate-income families. It is of central importance to Piedmont Housing staff and leadership that the apartments they manage be true homes—welcoming, stable, and well-maintained—for residents from a broad range of ages and incomes. The organization seeks to improve its policies and practices so that residents consistently feel welcome in their homes and staff can support them in reaching their goals.

One-Year Strategies:

- 1.1 Expand management and maintenance staff capacity to meet the needs of existing and new rental units.
- 1.2 Develop consistent internal rental agreements and policies for property management and maintenance departments.
- 1.3 Identify funding gaps and needs for resident services coordinator (workforce development, financial counseling, housing and home ownership counseling).

Background

Property management and maintenance is the front line of Piedmont Housing's interaction with many members of the community. Staff deeply value both their opportunities to engage with residents and their role in supporting welcoming homes and communities. In line with its core value everyone having a place to call home, Piedmont Housing will work to improve its property management processes and staff support to better serve residents. Clear policies and attractive upkeep are one piece of the staff and Board commitment to support residents of Piedmont Housing's rental home communities in reaching their goals.

Due to rapid acquisition of apartment properties, projected growth with new staff, and new leadership since 2014, the organization recognizes the need to standardize information and management procedures, clarify property records, coordinate across locations, and ensure that on-site staff have the authority, knowledge, and capacity to represent Piedmont Housing in a way that embodies the organization's core values.

In addition to pursuing improvements to current policies, procedures, and facilities, Piedmont Housing seeks to expand services to residents. A team will determine the needs and support resources available for residents, such as workforce development and financial counseling.

Goal Two: Housing Counseling, Financial Education, and Asset Building

Goal Two: Empower and inspire individuals and families from diverse racial and socio-economic backgrounds to set and meet their financial and housing goals.

Piedmont Housing will enhance its support for community members seeking to improve their financial capacity or preparing to purchase—rather than rent—a home. Piedmont Housing provides community financial education and housing counseling services that support residents in becoming more financially stable and pursuing home ownership. Given historical racial barriers to homeownership and the resulting racial disparities in homeownership and wealth accumulation, and its own commitment to equity, Piedmont Housing will pair general strategies to improve its service delivery with particular actions to enhance its impact and reach among African American households in 2018 and beyond.

One-Year Strategies:

- 2.1 Provide meaningful program analysis and information to communicate Piedmont Housing Alliance's value and impact.
- 2.2 Support client and resident success through an innovation strategy that incorporates an updated service and referral model, staff training, and technology.
- 2.3 Enhance Piedmont Housing's impact and reach among African American households with regards to financial capability and home ownership.
- 2.4 Increase the knowledge and use of Piedmont Housing's down payment assistance programs.

Background

An essential element of Piedmont Housing's service to the community is the education and counseling services that the organization offers at no or low cost. These services go beyond addressing individuals' immediate housing needs to strengthening clients' financial knowledge and helping them access additional resources in support of home ownership. Such services have the potential to assist residents of Piedmont Housing rental properties as well as members of the broader community in the pursuit of financial stability and household wealth-building.

In 2018, Piedmont Housing seeks to increase knowledge of and access to these services among residents of its rental properties and African American community members. Expanding counseling among current residents of properties Piedmont Housing manages can help improve rental payment histories and create more housing stability. Expanding reach among African American households can support residents who have historically been excluded from homeownership resources and address racial inequities in housing and wealth building within the broader community.

Success depends on improving service delivery through expanding reach (marketing and communications), better understanding of outcomes and service delivery (technological improvements), and coordination between counseling and property management staff.

In order to raise awareness and meet the needs of the groups Piedmont Housing seeks to reach, staff recommended improvement to communication—both internal (between staff in different business lines) and external (community outreach). Because the intent is to pursue these efforts with existing staff, Piedmont Housing faces an inherent organizational capacity challenge that it will work to address through improved use of technology and efficient record keeping.

Finally, in recent years Piedmont Housing has experienced a decline in the number of down payment assistance clients served. This program provides a valuable and unique service to low and moderate income members of the community. In order to understand and respond to the trends, the housing counseling team will conduct research on market conditions and design a more effective program and marketing approach.

Goal Three: Friendship Court

Goal Three: Successfully redevelop Friendship Court as a mixed income neighborhood that empowers ongoing resident leadership and engagement, provides residents with access to greater education and economic opportunities, and fosters a collaborative and positive community spirit.

As Piedmont Housing redevelops its signature property to become a successful mixed-income neighborhood, the staff and leadership strive to engage the community and stakeholders in an inclusive process. The vision for Friendship Court is a place of positive community spirit, where residents can access educational and workforce opportunities, supported by a financially sustainable redevelopment model. Additionally, Piedmont Housing will explore the possibility of homeownership opportunities for low-income families at Friendship Court. In 2018–2021, Piedmont Housing will improve its internal and external communication and collaborative efforts for a strong community in the heart of Charlottesville.

One-Year Strategies:

- 3.1 Complete the hiring and training of property management and maintenance staff prior to redevelopment ground breaking.
- 3.2 Financing and contingency plans in place for Friendship Court for Phase 1 redevelopment.
- 3.3 Establish internal and external communications plans.

Background

The leadership and board of Piedmont Housing Alliance have made a commitment to redevelop Friendship Court in a way that includes residents and the community, reflects

best practices, and results in a higher quality of life that extends beyond the physical structures. Some of Friendship Court's 150 families may always reside there, while for others, it will be a stepping stone, but it is Piedmont Housing's priority that the community feel like a home for each resident. Piedmont Housing is actively working to transform Friendship Court into a community that supports both residents (e.g., employment and economic opportunities and personal growth) and the neighborhood (e.g., improving quality and reputation).

To date, Piedmont Housing has engaged residents and community stakeholders through an extended process of gathering input and ensuring that the fundamental purpose of the work—to benefit residents—is honored throughout the design and execution of redevelopment efforts. As staff work with community members and residents in early stages of the property's redevelopment, they have identified the need for sufficient staff capacity, clear information sharing, strong financial management, and intentional community engagement as central factors to Piedmont Housing's successful redevelopment of Friendship Court.

In order to complete the first phase of redevelopment successfully, Piedmont Housing will work to build a skilled and knowledgeable team. This will entail hiring and training new staff in a timely manner and internal coordination between staff, Friendship Court residents, consultants, and Piedmont Housing leadership. To support external relationships through the process, a full communications plan—addressing neighboring communities, funders, the media, and other stakeholders—will be developed and implemented.

Goal Four: Organizational Excellence

Goal Four: Achieve organizational excellence through mission-focused board leadership, resource development, and effective community partnerships.

Piedmont Housing will strengthen its capacity to provide service and leadership to the community. Board members will increase their partnerships and funding strategies to sustain and grow the organization. Internally, Piedmont Housing staff will build capacity and improve infrastructure to meet national housing and community development standards and draw on data to measure and communicate the organization's added value. Piedmont Housing will work to purposefully collaborate across staff business lines and increase information sharing between the staff and Board.

One-Year Strategies:

- 4.1 Build a high impact board that leads regional progress on affordable housing.
- 4.2 Expand property management, fundraising, and community partnerships to create a diverse and sustainable revenue source.
- 4.3 Build community and organizational excellence through increased mutual learning, accountability, and information sharing across the organization.

Background

Piedmont Housing Alliance's Board members are invested in growing the organization's capacity to provide quality affordable housing to the community's most vulnerable residents. They recognize that achievement of their mission requires ample resources, a cohesive operation that connects staff and Board, sufficient capacity, and good relationships with stakeholders and community members.

Board members will expand fundraising efforts to increase revenues and contribute more in-kind professional and personal support. In 2018, the Board will set its own capacity for excellence and ensure that the work is consistently mission-driven and operating in accordance with the organization's core values. Staff and board members will implement an intentional communications strategy to be more unified in their knowledge of organizational activity and aligned in a common purpose.

Strong financial management is important to Piedmont Housing's sustainability, particularly as the organization has recently expanded its property acquisitions. Continuing its commitment to excellence in quality and fiduciary responsibility, Piedmont Housing will pursue accreditation through NeighborWorks America and consider how central a role its CDFI status will play in future fiscal and functional strategies.

Goal Five: Racial Equity

Goal Five: Develop organizational leadership to catalyze institutional change in Charlottesville and surrounding counties, as well as the affordable housing sector, toward eliminating internal and external systems of racial, cultural and ethnic inequalities.

Piedmont Housing's Board and leadership established a fifth goal to advance racial equity inside the organization and advocate for greater racial equity in the surrounding community. This step reflects the Board's concern with historical racial barriers in housing and the resulting inequities in financial assets, wealth, and homeownership that have been carried down across generations. Board and staff members believe that Piedmont Housing—as a non-profit housing developer working to expand access to homeownership, household financial capacity, and affordable housing—is uniquely situated to address racial equity in housing and community building.

One-Year Strategies:

Conduct an intentional assessment of our internal operations and client services and make necessary changes that help close racial, cultural and ethnic equity gaps within the immediate areas served by Piedmont Housing Alliance.

Method & Approach

To arrive at updated strategies and a new goal on racial equity, Piedmont Housing engaged in a non-traditional and participatory strategic planning process, in consultation with Communitas Consulting, of Charlottesville, Virginia. This process enabled the organization to involve its full staff and develop a one-year operational plan to spur immediate action on the organization's strategic goals. A Planning Committee of staff and Board members guided the strategic planning process; they conducted environmental scans, analyzed research, designed staff and board retreats, and guided the roll out of an interactive staff and board work group process. To inform the process, Communitas Consulting surveyed and held focus groups with staff and Board members. This early data confirmed that the current four goals of the 2014 plan remain relevant to the organization and set the stage for greater staff engagement in the plan. Surveys confirmed staff's desire for both input regarding the organization's strategic direction and guidance on immediate organizational tasks.

In March–April 2018, four work groups (three staff and one Board) reflected on Piedmont Housing's goals and recommended updated strategies and language reflecting current realities. Staff work groups addressed the topics of rental housing; housing counseling, financial education, and asset building; and Friendship Court. A fourth work group, addressing organizational excellence, was facilitated and led by Board members. All Piedmont Housing Alliance staff members were asked to participate in the groups and ranked their preference for which group to join. Once established, each staff work group included five to nine Piedmont Housing staff members from different business lines, with a staff member serving as chair and leading their groups through a series of three meetings.

Over the course of these meetings, the work groups evaluated the key challenges and opportunities associated with each goal area, considered revisions to 2014 the goal language, determined three to four high-impact, one-year strategies to implement the goal, and made recommendations for the associated action steps, timeframes, metrics for evaluation, and leads/responsible parties. Work groups presented their findings and recommendations at a Board retreat in April 2018 for Board discussion and approval.

In addition to refining and affirming the four goals at the Board retreat, Board members and work group chairs agreed to add a fifth goal dedicated to fostering racial equity. This step reflected the Board's concern with historical racial barriers in housing and the resulting inequities in financial assets, wealth, and homeownership that have been carried down across generations. As a non-profit housing developer working to expand access to homeownership, household financial capacity, and affordable housing, members believe that Piedmont Housing is uniquely situated to address racial equity in housing and community building. The development of this goal is underway in June 2018.

Summary

To support affordable housing opportunities in the Charlottesville region and increase its impact, the Piedmont Housing Alliance board and staff are committed to enhancing its

rental housing opportunities, providing coaching and support for community members, redeveloping Friendship Court, and achieving internal excellence. In pursuit of these goals, the organization is bringing staff and Board members together to learn and work side by side on a one-year operational plan that will guide its efforts. Looking ahead, Piedmont Housing will be a leader in expanding access to affordable housing, creating welcoming and supportive communities, and fostering greater racial equity in the region.