



Bienestar

**Strategic Plan
2008-2011**

Mission Statement

Bienestar builds housing, hope and futures for the well-being of working families.

Vision statement:

Quality affordable housing is essential for individuals, families and communities to thrive. We envision and develop communities where residents find dignity, hope, confidence, skills and courage to pursue their dreams.

Bienestar believes that all work is honorable and champions those who provide essential labor to the community. We work to unleash the potential of people to improve the quality of life for themselves, their children, their families and the community.

History of Organization, Who We Currently Serve, and Priority Clients for Future

Housing Development Corporation was founded in 1981 as a project of Community Action in Hillsboro to address the urgent housing needs of migrant farmworkers in Washington County. HDC received support from Washington County's Office of Community Development to undertake the first building projects. In spite of strong nimbyism that resulted in court action, Elm Park in Forest Grove was completed in 1985, providing 50 units of affordable housing for farmworkers. HDC operated in its early years as a volunteer organization with no paid staff.

The first full-time Executive Director was hired in 1995 – Loren Dixon, and a full-time Resident Coordinator was hired as well, demonstrating early on the belief in the integration of services with housing.

Doug Longhurst and Linda Netherton served as Co-Executive Directors for seven years, having been involved prior to that as volunteers and board members. By 1999, HDC had constructed Elm Park I, Elm Park II, Cornelius Park, Reedville and Montebello Apartments, all supported by RD (Rural Development)/USDA (U.S. Department of Agriculture) and exclusively for farmworkers. Longhurst and Netherton worked on the development of Jose Arciga apartments and Sycamore View in Scappoose. HDC celebrated its 25th anniversary in 2006 and that summer Linda and Doug resigned, immigrating to Canada.

At that point HDC owned seven multifamily housing properties with 254 units. The resident population was 99% Hispanic, and at least one member of the household had to be certified as an agricultural worker. Prior to his departure, Longhurst initiated the acquisition of three properties (Sunset Gardens and Sierra West in Hillsboro, Willow Park in Forest Grove) from PNC Multifamily Properties. This deal was in negotiations for 3 years, and was finally consummated by Sharon Nielson, HDC's longtime consultant in May, 2007. This acquisition marked HDC's first foray into LIHTC (Low Income Housing Tax Credits) property development.

With the acquisition of 204 units at these three properties, the size of HDC's portfolio doubled overnight to 458, and the residents no longer had to qualify as farmworkers. Extensive rehabilitation/reconstruction work commenced in June, 2007 and is anticipated to complete June, 2008. The only requirement for the new residents is that their family income be below 50% of area median income. The properties were almost empty during the construction, so as we enter lease-up in 2008 we will be anxious to measure the demographics of our new residents. As it stands now (May, 2008) the demographics are largely Hispanic families working in a variety of jobs.

Following the departure of Longhurst and Netherton in 2006, HDC struggled in its search for new leadership until the appointment of Shawcross in September, 2007.

In May, 2008, the board amended the articles of incorporation to change the name of HDC to Bienestar. This is part of an overall effort to reposition the organization in the community, to reduce confusion with HDC in Portland, and to attract more individual donors who are disinclined to contribute to an organization with “development “ and “corporation” in its name. A more detailed history of the organization can be found in the Appendix.

Executive Summary

The strategic plan for 2008-2011 will take the organization through a new period in the history of the organization as we begin our 27th year. Marked by many changes, 2007 was a watershed year in the life of HDC as we:

- weathered a financial crisis
- recruited a new executive director
- rebuilt a strong new board
- ramped up resident services programs
- doubled the size of our portfolio
- moved from exclusively farmworker housing to low-income families
- overcame NIMBYISM in Scappoose with our new property
- developed new LIHTC properties
- gained experience in acquisition/rehab

As we look forward with new energy, enthusiasm and commitment to the next three years, we anticipate a challenging environment dominated by factors including:

- Economic downturn = elimination of tax credits as a viable financing option; decreased individual donations; decrease in grant funding
- Exorbitant land prices in Washington County
- Anti-immigration sentiment creating environment of fear and panic in the hispanic community
- Strongly diminished demographic pool of farmworkers who meet the definition to qualify for our RD properties
- Lack of development pipeline and pipeline of new developer fees
- Change in vendors for accounting/auditing

It is our fervent hope that some of these environmental factors change over the course of the next 3 years, but we know that we will be dealing with them at least during 2008-2009. What all this means for Bienestar as we make our strategic plan is that we must continue to develop **partnerships and collaborations** in order to continue to develop housing and provide services to our residents. It means that we must be creative and innovative in partnerships that allow us to leverage other resources that we could not get on our own. We will have to continue to operate effectively with a very small, dedicated staff who have demonstrated their ability to operate with limited resources.

Context for Our Decision

When our new Executive Director, Karen Shawcross assumed her new role in September, 2007, she asked the Board to postpone Strategic Planning from January to May so that the process could be informed by several preliminary projects that were undertaken, many grant-funded:

1. **Technical assistance** project to improve our financial processes and reporting was undertaken with Kay Sohl, Executive Director of TACS.
2. **Asset Management Planning** – With grant funds from Enterprise, NPF and OHCS, we worked with Housing Development Center to review our entire portfolio and develop a financial analysis modeling tool that allows us to anticipate physical, fiscal and compliance needs for the next 20 years.
3. **Property Development Planning** – Sharon Nielson of The Nielson Group was engaged to conduct a comprehensive survey, report and recommendations to the Board about the current and anticipated development and financing environment for affordable housing. Her complete report is included in the Appendix.
4. **Resource Development Planning** – supported by a grant from Oregon Community Foundation, we engaged Jeri Alcock of OnCourse Consulting to help develop plans for diversifying our funding base and increase our unrestricted gifts.
5. **Board Development** – former Board President Rob Fotheringham extended his term for an additional 5 months and assumed the role as Chair of Board Development Committee. He helped Shawcross recruit seven new Board members to build a newly energized and committed board.
6. **Surveys of Stakeholders** - a door-to-door Resident Survey was conducted in November, 2007 with 78% response rate to determine the critical needs/wants of residents for programs and resources. In April, 2007 an online survey was conducted among key stakeholders and community partners and donors to guide strategic planning and rebranding efforts.
7. **SWOT Analyses** – in September, 2007, as part of a technical assistance project funded by Enterprise Foundation and NPF, a team from TACS conducted a SWOT (Strength, Weaknesses, Opportunities, Threats) analysis of Housing Development Corp. In October, 2007, Shawcross and the entire HDC staff conducted a SWOT, and in May, 2008, the Board did one as well. The results of all three analyses were remarkably similar with recurring themes across stakeholder groups.
8. **Board Retreat** – a full day Board retreat was held in May, 2008. Facilitated by Jeri Alcock, it provided the preliminary work for setting the new directions for the 2008-2011 strategic plan.

Summary of Core Strategies

The strategic plan for 2008-2011 has seven overarching elements that will inform Bienestar's goals for the next three years:

- 1. Housing Development**
- 2. Financial:
Sustainability/Transparency/Accountability**
- 3. Resource Development**
- 4. Communications & Advocacy**
- 5. Resident Services Programs**
- 6. Organizational Effectiveness**
- 7. Board Development**

Detailed Core Strategies with Goals and Objectives

1. Housing Development

Goal: Increase the availability of quality, safe and affordable housing for low- and moderate income working families. Maintain and improve the quality of life in the communities we develop and maintain.

2. Financial: Sustainability/Transparency/Accountability

Goal: Ensure the viability and sustainability of the organization. Act as good and faithful stewards of funds of the organizations and of the property portfolio.

3. Resource Development

Goal: Over the next three years we hope to increase our support from other sources, particularly individual giving. We are committed to raising funds to support the continuation of resident services programs.

4. Communications and Advocacy

Goal: Work collaboratively with other organizations serving farmworkers and other low-income Latinos to assure equal opportunity and fair treatment. Rebrand HDC as Bienestar, increasing visibility in the community.

5. Resident Services Programs

Goal: Continue to live the value that programs are an essential aspect of our housing; provide programs and services that are responsive to the critical needs of our residents, provide tools for increased economic independence, and empower residents through the Promotores program.

6. Organizational Effectiveness

Goal: Maintain an effective, motivated and stable organization that is well-recognized and respected as a leader in affordable housing development with cultural competency.

7. Board Development

Goal: Develop and maintain a strong, active, informed and contributing Board of Directors whose governance and support roles help Bienestar achieve its mission.

1. Housing Development

Goal: Increase the availability of quality, safe and affordable housing for low and moderate-income working families. Maintain and improve the quality of life in the communities we develop and manage.

Objectives:

- Continue to seek additional viable new development project acquisition opportunities for construction, rehabilitation.
- Pursue acquisition of expiring project-based Section 8 properties in Washington County to preserve affordable housing.
- Explore opportunities for tandem mixed-use projects with for-profit developers.
- Pursue opportunities for including affordable housing and Bienestar participation in major planning efforts like South Hillsboro.
- Investigate potential of new HUD resources for multi-generational housing programs with acquisition of HUD 202 properties.
- Actively plan to track and promote residents moving up the housing continuum.
- Complete and utilize 20 year asset management planning modeling tool to anticipate capital, reserve, refinance, restructure, cash flow for each property in the portfolio.
- Gain expertise in the management and compliance requirements of LIHTC (Low Income Housing Tax Credits) properties.
- Participate as housing partner in Bridges to Housing Program in Washington County.

2. Financial: Sustainability/Transparency/Accountability

Goal: Ensure the viability and sustainability of the organization. Act as good and faithful stewards of the funds of the organization and the property portfolio.

Objectives:

- Manage transition to new contract accountant and new auditor.
- Ensure timely completion of annual audits.

- Improve financial processes and procedures of the organization, ensuring appropriate system of checks and balances to mitigate risk.
- Increase capacity of in-house bookkeeping functions.
- Explore possibilities for job-sharing with other CDCs as cost-saving measure.
- Entertain potential future discussions about merger with other nonprofit organizations.
- Improve monthly/annual financial reports submitted to Board. Standardize and streamline fiscal processes and procedures.
- Continue active engagement of Board Treasurer and Finance Committee.
- Establish an Audit Committee of the Board of Directors.
- Collect deferred developer fees on Sycamore View, Sunset Gardens, Willow Park, Sierra West, and Montebello.

3. Resource Development

Goal: Over the next three years increase our support from other sources, particularly individual giving. We are committed to raising funds to support the continuation of resident services programs.

- Establish a fund development effort with an emphasis on unrestricted gifts that will be self-sustaining within 4 years.
- Establish an annual fund development plan with a process for tracking outcomes.
- Carry out a board-driven gift campaign with a goal of \$20,000 in Year 1, focused on unrestricted contributions from individuals.
- Establish a top tier of major donors – individual who contribute at least \$1,000 annually and an annual stewardship plan to retain and grow support.
- Develop focused campaign to increase financial support from agricultural employers.
- Conduct one signature friendraiser event and one fundraising campaign each year.
- Track available federal grant funds for new projects.

- Board and staff will establish relationships with local churches and faith-based groups as potential partners/donors.
- Board will pilot house parties as a new vehicle for individual giving.
- Provide training for board and staff on resource development. Create new tools and collateral materials for fundraisers.

4. Communications and Advocacy

Goal: Work collaboratively with other organizations serving agricultural workers and other low-income Latinos to assure equal opportunity and fair treatment. Rebrand HDC as Bienestar, increasing visibility in the community.

- Develop regular timeline of annual communications to stakeholders to include newsletters, blast emails, and annual report.
- Create annual schedule of speaking appearances and presentations by Executive Director and Board members (Animal clubs, City Councils, Chambers of commerce, etc.)
- Participate as member of affordable housing advocacy organizations (AOCDO/.CDN, Housing Alliance, Housing Advocacy Group, HSSN, 10 in 10 funding group, etc.)
- Rebrand all HDC collateral and communications materials with Bienestar name and logo.
- Set goal and achieve results for positive PR and press results – media coverage.

5. Resident Services Programs

Goal: Continue to live the value that programs are an essential aspect of our housing; provide programs and services that are responsive to the critical needs of our residents, provide tools for increased economic independence, and empower resident through the Promotores program.

- Develop adequate funding resources to maintain Promotores program through 2011.
- Recruit and train new Promotores for Sunset Gardens, Willow Park, and Sierra West.
- Conduct Resident Survey every two years – next one will be 2009.

- Complete 3 year plan for resident services programs.
- Make the necessary investment in Resident Services programs to create a self-sustaining program within 4 years. Continue to support the inclusion of resident services programming as a line item in property budget where allowed.
- Continue to explore partnerships and collaborations with other organizations to develop programs for residents that allow us to leverage other funding sources.

6. Organizational Effectiveness

Goal: Maintain an effective, motivated and stable organization that is well-recognized and respected as a leader in affordable housing development with cultural competency.

- Provide consistent professional development opportunities to enhance the skills of staff.
- Staff participates regularly in peer learning networks (PAMWAG, ED Network, Resident Services Peer Group, etc.)
- Staff develops annual Hoshin plans to implement the Strategic Plan. Individual staff plans reviewed quarterly. Performance reviews conducted annually with outcomes tied to actions and outcomes driving the strategic plan.
- Research compensation surveys every 2 years to assure staff salaries are competitive.
- Tie merit increases to achievement of measurable performance goals and objectives.
- Continue to support recruitment and retention of highly effective staff by offering generous employee benefits (403B matching plan, contributory medical/dental, Costco cards, vacation, mileage reimbursement, budgeted professional development fund).

7. Board Development

Goal: Develop and maintain a strong, active, informed and contributing Board of Directors whose governance and support roles help Bienestar achieve its mission.

- Fully functioning Board Development Committee is active year round in recruitment, Board training. Board self-assessment and retreat planning.
- Conduct annual Board self-assessment.
- Achieve 100% Board giving annually with 1/3 of gifts at the major gift level.
- Maintain diversity in board membership (age, gender, profession, ethnicity, etc.)
- Comply with CHDO requirements for 1/3 board membership to certify qualifications.
- Board conducts annual evaluation of progress of Strategic Plan.
- Conduct formal orientation for new board members.
- Continue tradition of board training to ensure an informed decision-making body.