

Community Partners for Affordable Housing Strategic Plan April 1, 2014 - March 31, 2017



Mission:

To provide access to quality housing that is permanently affordable for current and future generations.

Vision:

We will be a financially sustainable organization that is highly recognized, valued and supported by multiple communities and seen as the regional leader with regard to permanently affordable housing. We will provide a range of perpetually affordable for-sale and rental housing opportunities and offer comprehensive services to homeowners and renters that will help participants be successful and realize the full benefits of affordable housing.

Core Principles

1. **Perpetual Affordability:** We will provide housing opportunities for low- and moderate-income households that will permanently remain affordable for future generations.
2. **Community Stewardship of Land:** We will steward land in order to provide affordable housing for the benefit of the communities in which the land is located.
3. **Diversity:** We will offer a range of housing styles, types, locations, sizes and prices in order to meet the needs of a wide array of families and individuals. We will promote cultural and economic diversity.
4. **Community Vibrancy:** We will strengthen communities by protecting existing housing stock, preserving neighborhood character and providing affordable housing opportunities that are necessary in order to foster diverse, vibrant and sustainable communities.
5. **Support:** We will continue to assist and advocate on behalf of the organization’s homeowners and renters to ensure their success, help realize the full benefits of our program and encourage participants to fully engage in the community.
6. **Sustainability:** We will create quality housing that is environmentally sustainable.
7. **Representative Governance:** We will identify key stakeholders and involve them in the decision making of the organization, particularly persons who own or rent housing through our program.
8. **Integrity:** We will maintain the highest level of integrity in all of our work, carefully consider the best interest of our clients, evaluate the community and social impact of our actions, ensure responsible risk-taking and balance fiscal and social responsibility.
9. **Flexibility:** We will remain flexible in order to meet changing community needs.
10. **Advocacy & Education:** We will raise awareness about the need for affordable housing and educate the public about the community benefits of having a diverse range of housing opportunities.

Executive Summary

This three-year strategic plan covers the period April 1, 2014 through March 31, 2017 for Community Partners for Affordable Housing (CPAH). The plan is a culmination of six months of analysis and planning which involved members of the CPAH Board of Directors, Advisory Boards, staff and homeowners as well as municipal representatives, funders, community representatives and volunteers from McKinsey & Company. The plan is intended to thoughtfully guide the organization's growth and secure its financial sustainability. Through this planning process, the following four objectives have been established for the next three years:

• **By 2017, CPAH will increase its annual revenue by 20% and have more diverse funding sources for both operations and projects to ensure financial sustainability.**

• **By 2017, CPAH will be well known and valued by residents, donors, businesses, government entities, social service agencies, religious institutions and those who can benefit from affordable housing,**

• **By 2017, CPAH will expand its inventory of rental housing, provide affordable housing in additional communities and evaluate additional affordable housing models.**

• **By 2017, CPAH will have the necessary staff, board composition and infrastructure to successfully support organizational growth.**

The day-to-day oversight of this plan will be the responsibility of the Executive Director. A formal evaluation of the organization's progress will be conducted at least annually by the full Board of Directors.

History of CPAH

In the latter part of the 1990s, the City of Highland Park embarked on a master planning process to update the City's comprehensive Master Plan. In May 1997, after months of community meetings, the City Council adopted goals to guide the process. Master Plan housing goals include:

- *To preserve, maintain, and promote housing of high quality that reflects the community's commitment to cultural and economic diversity.*
- *To maintain and increase diversity in housing styles, sizes, types, densities, and prices or rents in order to welcome a wider array of families and individuals into the community.*
- *To provide affordable housing that is an integral part of neighborhoods throughout the community.*

As the master planning process continued, there was increasing concern about the lack of affordable housing opportunities and its negative impact on the City's tradition of inclusiveness. Based on a joint recommendation of the City's Housing, Human Relations, Plan and Historic Preservation Commissions, the City Council in November 1998 directed the Housing Commission to prepare an affordable housing plan to be incorporated in the City's Master Plan. With assistance from the University of Illinois at Chicago's Natalie Voorhees Center for Neighborhood and Community Improvement and Great Cities Institute, the Housing Commission studied best affordable housing practices nationwide and selected those best suited to Highland Park.

Based on direction from the City Council and extensive research, including case studies of several existing, successfully operating community land trusts, the Housing Commission developed a framework recommendation for adapting the land trust model to meet local needs. Community Partners for Affordable Housing (then known as the Highland Park Illinois Community Land Trust) was recognized by the Internal Revenue Service as an independent 501(c)(3), non-profit organization on July 25, 2003. Since then, the organization has created nearly 60 units of housing that will remain affordable in perpetuity and is widely recognized as a model throughout the region.

In 2010, CPAH expanded its geographic service area to include communities within a 20-mile radius of Highland Park in order to reflect a more sustainable, best practice model that allows the organization to collaborate with other communities in the region. As such, the cities of Lake Forest and Evanston are now partnering with CPAH to build a more sustainable, regional community land trust that can take advantage of a shared infrastructure, create economies of scale, reduce duplication of services, be more efficient and effective and provide more and better services to help families and communities ensure long-term housing stability.

Strategic Planning Process

In July 2013, the Program Development and Evaluation Committee of CPAH’s Board of Directors met with staff to establish a framework and methodology to initiate a strategic planning process. The primary intent of the plan was to thoughtfully guide the organization’s growth and secure its financial sustainability. CPAH was extremely fortunate to receive pro bono strategic planning consulting services from volunteers who work at McKinsey & Company, a highly regarded international consulting firm with tremendous expertise in nonprofit planning and management. As a team, the committee and volunteers from McKinsey & Company agreed that, at the end of the process, the organization should have a realistic three-year plan that would be successfully implemented and routinely evaluated.

The team’s first steps were to identify and recruit key participants, collect relevant industry data and to formulate surveys and interviews to collect information from CPAH board members, staff, homeowners, elected officials, municipal staff and other stakeholders. Through these mechanisms, information was gathered about the organization’s perceived strengths, weaknesses, opportunities and threats; community needs; past success; and the level of satisfaction from participants in the program. The survey and interview results were used as the foundation for a half-day strategic planning retreat held on Saturday, October 26, 2013. The retreat included volunteers from McKinsey & Company, CPAH Board and Advisory Board members, municipal representatives, elected officials, homeowners, staff and other key stakeholders from Highland Park, Lake Forest and Evanston.

The meeting resulted in the development of a series of objectives and strategies related to four issues that were identified as being most critical to the organization over the next three years: 1) finance and fundraising, 2) marketing and public relations, 3) programming, and 4) CPAH’s operating model. A draft plan was presented to CPAH’s Advisory Board on January 15, 2014 and then to CPAH’s Board of Directors and other strategic planning participants on February 13, 2014. The Program Development and Evaluation Committee incorporated changes and feedback and the final document was then adopted at the March 13, 2014 meeting of the CPAH Board of Directors.

Finance & Fundraising

Objective:

By 2017, CPAH will increase its annual revenue by 20% and have more diverse funding sources for both operations and projects to ensure financial sustainability.

Strategies:

- 1) **Expand Fundraising Strategies**
Identify and implement activities that can most effectively increase the organization's fundraising revenue. Examples include new grants, events, corporate sponsorships, online fundraising platforms and other fundraising strategies.
- 2) **Strengthen Individual Giving**
Create a more sophisticated development program that incorporates donor cultivation, planned giving, donor management software and the necessary staff support to help CPAH ambassadors more effectively cultivate their donor relationships.
- 3) **Increase Earned Revenue**
Identify and implement activities that can provide additional earned revenue for the organization. Examples include additional developer fees, consulting services, securing HUD contracts and/or other services that are consistent with CPAH's mission and strengths.
- 4) **Diversify Project Funding**
Develop or partner on projects that can access additional funding sources such as Low Income Housing Tax Credits, Federal Home Loan Bank and targeted grants for specific populations (i.e. seniors, veterans, persons with disabilities).

2017 Goals

- 1) CPAH's non-government fundraising, not including individual giving, will raise \$75,000 per year (an increase of 100%).
- 2) CPAH's individual giving will raise \$90,000 per year (an increase of 50%).
- 3) CPAH's earned income will raise \$75,000 per year (an increase of 100%).
- 4) CPAH will secure project funding from at least one new source.

Marketing & Public Relations

Objective:

By 2017, CPAH will be well known and valued by residents, donors, businesses, government entities, social service agencies, religious institutions and those who can benefit from affordable housing.

Strategies:

1) Expand and Strengthen Relationships

Develop a map of CPAH’s network (primarily board and advisory board members) to build new relationships and further cultivate existing relationships to garner increased public, political and financial support and awareness.

2) Strengthen Messaging

Develop targeted messaging and talking points for different stakeholders and update messaging in print materials, website and other marketing tools.

3) Expand Online Presence

Expand CPAH’s online presence. Strategies include optimizing CPAH’s website, making the website more interactive, and increasing the use of social media and advertising.

4) Increase Local Advertising

Expand marketing efforts through increased posters/billboards in low-cost service areas, public transportation centers, presentations to local employers and organizations, and paid advertising, with particular emphasis on outreach to minority populations.

2017 Goals

- 1) CPAH will have a strong relationship with at least 30 new individuals or institutions as well as increased commitment from existing supporters.
- 2) CPAH will have clear and compelling messaging customized to different stakeholders and communities.
- 3) CPAH will have at least 10,000 unique visitors per year on its website (an increase of 100%) and at least 675 “friends” on Facebook (a 50% increase), in addition to other enhancements to its online presence.
- 4) CPAH will have at least 120 attendees per year at information sessions (an increase of 50%).

Programming

Objective:

By 2017, CPAH will expand its inventory of rental housing, provide affordable housing in additional communities and evaluate additional affordable housing models.

Strategies:

- 1) **Serve Additional Geographic Communities**
Continue to grow CPAH as a regional organization by providing affordable housing services in 1-3 new geographic communities by 2017.
- 2) **Expand Rental Housing**
Continue to expand CPAH's inventory of rental housing.
- 3) **Diversify Populations Served**
Identify housing needs of specific populations (i.e. seniors, veterans, persons with disabilities) and establish partnerships with relevant organizations to address unmet needs.
- 4) **Consider Additional Affordable Housing Models**
Research additional affordable housing models such as lease-to-own, cooperatives and shared living models that may be appropriate for specific populations.

2017 Goals

- 1) CPAH will be working in at least one additional community.
- 2) CPAH will add at least 10 additional units of rental housing
- 3) CPAH will partner with at least one organization to provide housing for an underserved population, while ensuring CPAH remains true to its mission.
- 4) CPAH will evaluate additional housing models and make a recommendation to the CPAH Board of Directors regarding the implementation of any new models.

Operating

Objective:

By 2017, CPAH will have the necessary staff, board composition and infrastructure to successfully support organizational growth.

Strategies:

1) Evaluate Staffing Needs

Develop a staffing model, including budgetary impact, to ensure that CPAH continues to provide high-quality services and has the staffing capacity to support organizational growth.

2) Effectively Utilize CPAH's Board & Advisory Boards

Evaluate board structures and composition to determine gaps in skills, experience and/or relationships and identify strategies to more effectively utilize CPAH's boards to support organizational growth.

3) Improve Technology Infrastructure

Implement software solutions to improve organizational efficiency and manage growth, particularly related to asset management, waitlist management, donor cultivation and communications.

2017 Goals

- 1) CPAH will develop and implement a sustainable staffing model based on anticipated workloads.
- 2) The Board Governance Committee will evaluate board effectiveness and make recommendations to the CPAH Board of Directors pursuant to its findings.
- 3) CPAH will have efficient technological systems to track assets, manage its waitlists and strengthen relationships.

Appendix 1: Timeline & Responsibility

Strategies	Target Timeline	Responsibility
1. Financing & Fundraising		
1.1 Identify and implement activities that can most effectively increase the organization's fundraising revenue. Examples include new grants, events, corporate sponsorships, online fundraising platforms and other fundraising strategies.	Year 1: Raise \$41,250. Year 2: Raise \$56,250. Year 3: Raise \$75,000.	<u>Staff:</u> Executive Director <u>Committee:</u> Fundraising & Finance
1.2 Create a more sophisticated development program that incorporates planned giving, donor cultivation, donor management software and the necessary staff support to help CPAH ambassadors more effectively cultivate their donor relationships.	Year 1: Raise \$66,000. Year 2: Raise \$75,000. Year 3: Raise \$90,000.	<u>Staff:</u> Dir. Comm. Relations <u>Committee:</u> Fundraising & Finance
1.3 Identify and implement activities that can provide additional earned revenue for the organization. Examples include additional developer fees, consulting services, securing HUD contracts and/or other services that are consistent with CPAH's mission and strengths.	Year 1: Evaluate options. Year 2: Begin implementation. Year 3: Raise \$75,000.	<u>Staff:</u> Executive Director <u>Committee:</u> Fundraising & Finance
1.4 Develop or partner on projects that can access additional funding sources such as Low Income Housing Tax Credits, Federal Home Loan Bank and targeted grants for specific populations (i.e. seniors, veterans, persons with disabilities).	Year 1: Evaluate options/needs. Year 2: Project planning. Year 3: Secure funding from at least one new funding source.	<u>Staff:</u> Executive Director <u>Committee:</u> Fundraising & Finance

Strategies	Timeline	Responsibility
2. Marketing & Public Relations		
<p>2.1 Develop a map of CPAH’s network (primarily board and advisory board members) to build new relationships and further cultivate existing relationships to garner increased public, political and financial support and awareness.</p>	<p>Year 1: Develop relationship map and establish 5 new relationships. Year 2: Prioritize relationships to cultivate and establish 10 new relationships. Year 3: Establish 15 new relationships.</p>	<p><u>Staff:</u> Dir. Comm. Relations <u>Committee:</u> Board Nom. & Gov.</p>
<p>2.2 Develop targeted messaging and talking points for different stakeholders and update messaging in print materials, website and other marketing tools.</p>	<p>Year 1: Develop messaging and talking points. Year 2: Update marketing tools. Year 3: Review messaging</p>	<p><u>Staff:</u> Dir. Comm. Relations <u>Committee:</u> Program Dev. & Eval.</p>
<p>2.3 Expand CPAH’s online presence. Strategies include optimizing CPAH’s website, making the website more interactive, and increasing the use of social media and advertising.</p>	<p>Year 1: 5,500 unique visitors to website and 500 Facebook friends. Year 2: 7,500 unique visitors to website and 550 Facebook friends. Year 3: 10,000 unique visitors to website and 675 Facebook friends.</p>	<p><u>Staff:</u> Dir. Comm. Relations <u>Committee:</u> Program Dev. & Eval.</p>
<p>2.4 Expand marketing efforts through increased posters/billboards in low-cost service areas, public transportation centers, presentations to local employers and organizations, and paid advertising, with particular emphasis on outreach to minority populations.</p>	<p>Year 1: 90 info session attendees. Year 2: 100 info session attendees. Year 3: 120 info session attendees.</p>	<p><u>Staff:</u> Dir. Comm. Relations <u>Committee:</u> Program Dev. & Eval.</p>

Strategies	Timeline	Responsibility
3. Programming		
3.1 Continue to grow CPAH as a regional organization by providing affordable housing services in 1-3 new geographic communities by 2017.	Year 1: Identify and cultivate relationships in 1-2 communities. Year 2: Identify potential projects in new communities. Year 3: Provide services in at least one new community.	<u>Staff:</u> Executive Director <u>Committee:</u> Program Dev. & Eval.
3.2 Continue to expand CPAH’s inventory of rental housing.	Year 1: Add 2 rental units. Year 2: Add 3 rental units. Year 3: Add 5 rental units.	<u>Staff:</u> Executive Director <u>Committee:</u> Acquisition Comm.
3.3 Identify housing needs of specific populations (i.e. seniors, veterans, persons with disabilities) and establish partnerships with relevant organizations to address unmet needs.	Year 1: Identify housing needs of specific populations and evaluate CPAH’s capacity to provide housing. Year 2: Build organization capacity and develop relevant partnerships. Year 3: Partner with at least one organization to provide housing.	<u>Staff:</u> Executive Director <u>Committee:</u> Program Dev. & Eval.
3.4 Research additional affordable housing models such as lease-to-own, cooperatives and shared living models that may be appropriate for specific populations.	Year 1: Defer to Year 2. Year 2: Research additional housing models and feasibility. Year 3: Make recommendation to CPAH Board of Directors.	<u>Staff:</u> Executive Director <u>Committee:</u> Program Dev. & Eval.

Strategies	Timeline	Responsibility
4. Operating		
<p>4.1 Develop a staffing model, including budgetary impact, to ensure that CPAH continues to provide high-quality services and has the staffing capacity to support organizational growth.</p>	<p>Year 1: Develop staffing model. Year 2: Implement staffing model. Year 3: Evaluate staffing model.</p>	<p><u>Staff:</u> Executive Director <u>Committee:</u> Program Dev. & Eval.</p>
<p>4.2 Evaluate board structures and composition to determine gaps in skills, experience and/or relationships and identify strategies to more effectively utilize CPAH’s boards to support organizational growth.</p>	<p>Year 1: Evaluate board structures and composition; make recommendations to Board. Year 2: Implement recommendations. Year 3: Continue implementation.</p>	<p><u>Staff:</u> Executive Director <u>Committee:</u> Nom. & Board Gov.</p>
<p>4.3 Implement software solutions to improve organizational efficiency and manage growth, particularly related to asset management, waitlist management, donor cultivation and communications.</p>	<p>Year 1: Evaluate software solutions. Year 2: Implement solutions. Year 3: Evaluate effectiveness.</p>	<p><u>Staff:</u> Executive Director <u>Committee:</u> Program Dev. & Eval.</p>