



STRATEGIC PLAN

Prepared by EJP Consulting Group, LLC



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MESSAGE FROM THE EXECUTIVE DIRECTOR



I am pleased to present to you the 2022-2027 Strategic Plan for the Waco Housing Authority. This plan was developed with input from our residents, staff, Board of Commissioners, the City of Waco, McLennan County and Community Stakeholders. The input represents diverse viewpoints on how WHA can best serve the needs within our community. While we have always been dedicated to serving our existing residents and tenants, we also recognize that we have a broader role in improving the housing needs within the City of Waco and McLennan County. We want to make it our mission to leverage assets and community resources to advance affordable housing options that are diverse, inclusive and promote resident independence and quality of life. WHA envisions preserving affordable housing communities that are healthy and wholesome as well as enable greater sustainability and increase housing choices for residents.

WHA's strategic plan outlines strategies and priorities focused on residents, development that meets not only WHA needs but also community needs for affordable housing, as well as business needs to continue to provide and expand necessary services within our jurisdictional area. The initiatives related to each strategic priority represent what I believe to be appropriate actions needed to support our residents in becoming self-sufficient.

The plan establishes ambitious short- and long-term goals that concentrate our efforts to provide more than housing for the clients we serve through programs and initiatives offered by WHA and community partners. We plan to contribute to the personal growth and a successful future of our residents. The plan highlights attention to the development of new housing and redevelopment of existing housing. WHA recognizes that we cannot do this alone and will leverage our partnerships with other government entities, the private sector, and non-profits to achieve success by increasing affordable housing of all types in Waco. We also feel strongly that we advocate, facilitate, and support the efforts of other organizations strategizing to achieve similar goals.

The plan also addresses organizational capacity. I am fortunate to lead a staff of caring professionals who are excited about the opportunities they see in WHA not only for themselves in their professional growth but knowing their work will impact affordable housing in Waco for generations to come. I recognize the need to support them if we are to achieve our goals. This strategic planning process was structured in a manner to transform our vision and mission into real and achievable results. The plan outlines how progress will be tracked and performance will ensure we stay on track.

In closing, I would like to offer a huge thank you to our residents, staff, Board of Commissioners and our many stakeholders for their participation in the creation of this plan. The time and effort given to this process make clear steps needed to invest in the success of our community.

I look forward to realizing the vision we have created in this plan for our community.

A handwritten signature in black ink that reads "Millet Hopping". The signature is written in a cursive, flowing style.

Millet Hopping, WHAA director



MESSAGE FROM THE BOARD CHAIR

On behalf of the board of commissioners of Waco Housing Authority it is my privilege to introduce to our community this strategic plan. Our residents and community stakeholders have told us what they want, and this is our response.

We have accepted the challenge of providing more in the way of quality affordable housing through the leveraging of our many assets- both financial and people. The need for our service has continued to grow as our resources have been constrained. The partnership with the city of Waco has grown and we are seen as a trusted partner in meeting both institutions goals. The action steps and accountability measures outlined in each section of this report will be the blueprint for the transition from public housing to a responsive mission driven agency. Our work has often gone unrecognized or unreported in the community at large and a communication and marketing plan is an integral part of the work ahead.

This plan would not have been possible without the work of many dedicated staff members, residents, commissioners and community stakeholders.

Thank you.

EXECUTIVE SUMMARY

The Waco Housing Authority and Affiliates (WHAA) was formed in 1938 with one mission - to provide safe, decent and sanitary housing for the low-income families in the City of Waco, TX. Since that time, WHAA has grown and expanded its programs to assist thousands of families in Waco and beyond get access to not only affordable housing but also programs and services to build capacity and self-sufficiency.

Today, WHAA provides housing opportunities for families across multiple counties. They have expanded their portfolio to include managing or providing technical assistance to other Housing Authorities in Texas extending their reach and ability to assist families in other communities. WHAA has also changed their business model



from a public and governmental entity reliant on federal funds to operate as an innovative and entrepreneurial business that leverages its expertise to find creative solutions, increasing and expanding affordable housing opportunities for families in all the communities they serve.

In May 2021, WHAA embarked upon a journey to develop its first Strategic Plan with the intention of setting a course for the future of the agency. WHAA leadership, including the Board of Commissioners and

Executive Staff, undertook an extensive process to articulate agency priorities and establish consensus around goals to take WHAA into the next five years. With uncertain federal funding, programmatic changes, and an ever-increasing number of families in need of its services, WHAA set about to identify the best strategies to continue on its pathway of being the premier provider of affordable housing to low-income families, while at the same time providing pathways for those families to increase their own capacity and ability to thrive in Waco.

The process was an intensive one with many different stages. WHAA understood that before you could look ahead, you had to have a clear picture of where you currently are. The early stages of the planning process included grounding the agency team in WHAA's environment, looking both internally at current operations, as well as externally to WHAA's role in the development and administration of affordable housing programs in Waco and the surrounding communities WHAA serves. In addition to understanding the current environment in which WHAA operates, WHAA also engaged with a broad range of external stakeholders to understand how WHAA was perceived in the community. Conversations were had with both public and private partners to clearly understand how the community viewed WHAA and also identify ways WHAA could more effectively provide housing and service opportunities to not only WHAA residents, but the larger community as a whole.



Waco Housing Authority and Affiliates was formed in 1938, and has been serving the community for over 80 years.

Developing consensus around the future of the agency and goals required creativity, ingenuity, and flexibility, especially as this planning process was undertaken at the same time as the COVID-19 pandemic. Typical methods of engagement such as in-person meetings had to be reimagined in a virtual world that still provided for and encouraged participation by the WHAA Board and Executive team ensuring all parties were involved and invested in the discussion and decision-making processes. WHAA also needed to ensure that the goals that were set were realistic, attainable and actionable, and that WHAA would have a living, breathing plan that could continue to grow and change as the environment and agency itself would inevitably change.

WHAA's strategic plan paints a picture of a common vision for the Housing Authority's future, where WHAA is not just a Housing Authority administering federally funded programs, but a vibrant, enthusiastic, and creative leader in the quest to sustain existing affordable housing, increase affordable housing opportunities in the communities they serve, and offer innovative supportive programming to families to either improve their own standing or if they chose or age gracefully in place. It is with this vision to the future that WHAA is proud to introduce the WHAA Strategic Plan for 2022 – 2027.

The following three categories represent the areas in which the Waco Housing Authority will focus to achieve the greatest impact. The mission, vision, and goals of the Waco Housing Authority align with these strategic focus areas and tasks implemented over the next five years will support WHAA's goal of keeping alive the promise of 1938 to not only provide safe, decent and sanitary housing for its families but to continue to grow and innovate to better serve its clients and communities.

Visit the wacopha.org site to learn more.

WHAA's Strategic Plan is organized into three key areas:

PRESERVE and expand the supply of quality housing in the community

CHANGE WHAA business model to better align with the future direction of the agency

ESTABLISH an infrastructure to better support the families that live in WHAA communities to help them transition to greater economic self-sufficiency

INTRODUCTION

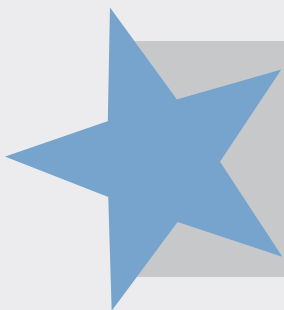
The Waco Housing Authority and Affiliates (WHAA) was established in 1938 to provide federally-funded public housing programs and related services for Waco’s low-income residents. WHAA owns and operates 652 public housing units on two large sites, and a Housing Choice Voucher program assisting over 2,500 families.¹ WHAA has 250 recently converted Rental Assistance Demonstration (RAD) units and owns an additional 338 unassisted units, which includes a combination of market rate and LIHTC affordable units. WHAA is currently in the midst of transitioning its remaining Public Housing portfolio into the Housing Choice Voucher program through the RAD program no later than 2025. In addition, WHAA operates the Mart Housing Authority, which is a small agency located approximately 30 miles west of Waco, with 32 Public Housing units, via a management contract, and administers a 20 unit Project-Based Voucher (PBV) contract for the Grandview Housing Authority, in Johnson County.



The executive staff team is stable with the current President/CEO employed with the agency for over 28 years and has served in her current position for the last four years. The Vice-President of Operations has also been with WHAA for over 28 years, and the Vice-President of Financial Services has been with WHAA for a total of ten years. Though organizationally the agency demonstrates a long-tenured Executive team, the President/CEO position will be transitioning within five years as the current President/CEO retires.

The tenure of the Board of Commissioners, however, is much shorter compared to the length of employment of the Executive team and industry standards. Of the five Board members, the longest tenured Board member has just over five years of service and will be leaving the Board in 2022. The newest Board member has served just under a year. Under the terms of appointment approved by the City of Waco, Board members are term-limited to no more than two full consecutive terms (not including filling a vacant terms).

¹ All agency-related data provided by Waco Housing Authority as of December 31, 2021, unless otherwise noted.



Across all its housing programs, WHAA serves 3,466 families in McLennan and Hood Counties.



There is a confluence of circumstances that have resulted in WHAA's interest in developing an inaugural strategic plan and a new road map to guide the agency going forward. Given WHAA's current trajectory, this Strategic Plan will outline a framework and action items for WHAA as it transitions its operations to a Housing Choice Voucher only agency, concentrating on mixed finance affordable and market rate housing. The Plan is also meant to manage executive and staff transitions. WHAA is also setting the stage for greater involvement in the affordable housing conversation in Waco and surrounding communities, while at the same time, developing more affordable housing and economic self-sufficiency programs for residents of all income levels. This plan is designed to identify strategic ways to build and/or sustain better partnerships, leverage WHAA's assets, and position the agency as the preeminent affordable housing provider in Waco.

The Strategic Plan is organized as follows:

- Message from the President/CEO
- Executive Summary
- Introduction
- WHAA in Context
- Developing the Plan – Planning Process
- The Plan
- Year 1 Action Plan
- Appendices and Reference Materials
- Acknowledgments

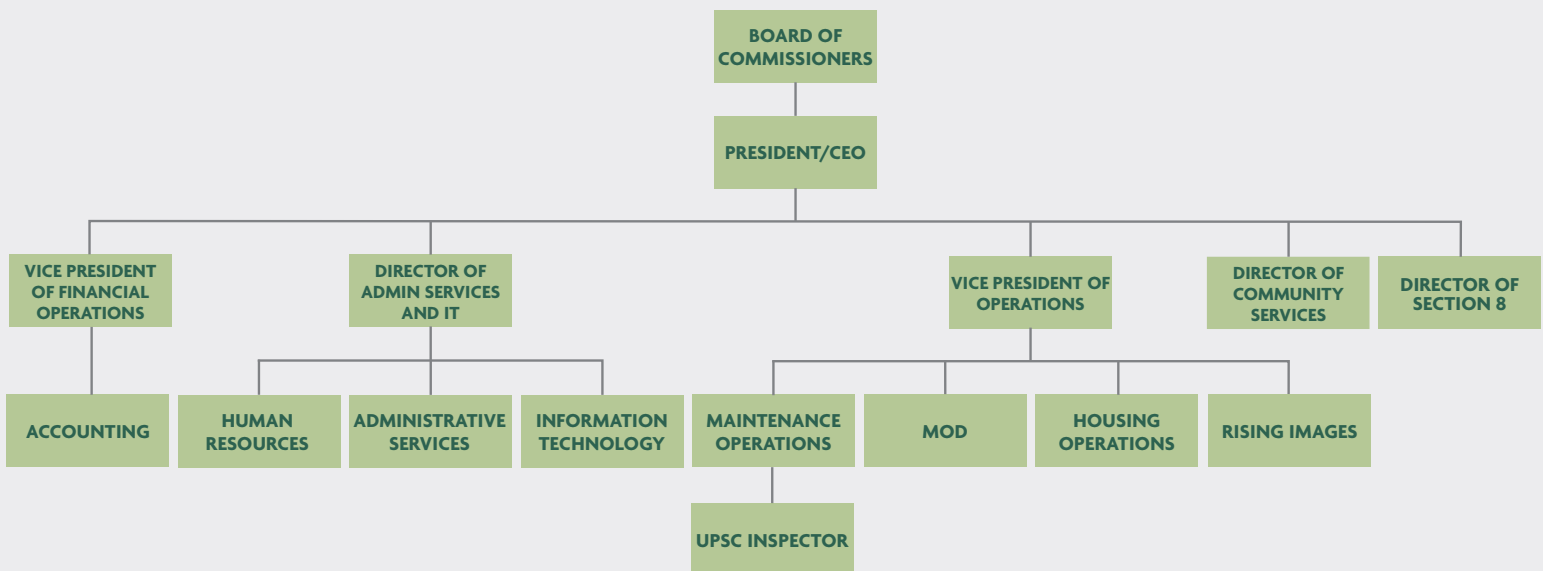
WHAA IN CONTEXT

WHAA is undergoing a significant agency change. It is converting its entire Public Housing portfolio of 902 units in three large, mixed finance RAD transactions by 2025. At the conclusion of this conversion, WHAA will no longer own and operate public housing units, but instead will provide affordable housing through the Housing Choice Voucher program and affordable, mixed-finance developments. In addition, WHAA is planning for the departure of their President/CEO in 2026. Combined with the significant population growth in the City of Waco and surrounding areas, WHAA understands that its business model will change as it looks to the future.

1 ORGANIZATION STRUCTURE AND STAFFING

Today, WHAA employs 75 employees. While all administrative positions are currently filled, there are vacant maintenance positions and WHAA has found that hiring new employees, which has historically been a slow process, has been a distinct challenge which has been further exacerbated by COVID-19. To encourage employee retention, WHAA has been gradually raising starting entry-level wages to \$15.00 per hour, but this is still below the hourly wage necessary to afford a two-bedroom unit at Fair Market Rent (FMR) in 2021. And, even with the deliberate action to raise wages and based on the information received through the focus group discussions, WHAA is currently understaffed in the Housing Choice Voucher department for the program size today, which will only be further exacerbated as WHAA completes the conversion of its Public Housing units through the RAD program and the need for additional Housing Choice Voucher staff to administer the RAD vouchers as the program grows. Additionally, WHAA has no staff or internal capacity besides the CEO to manage any expansion of the housing portfolio through new development.

WHAA's current organizational chart is as follows:



² <https://reports.nlihc.org/sites/default/files/oor/files/reports/state/tx-2021-oor.pdf>



As part of the strategic planning process, EJP interviewed staff to identify their perceptions of the strengths and weaknesses of the agency and each department. All the employees indicated they were very appreciative of the benefits provided by WHAA and WHAA's concern for a work/ life balance. With COVID-19 work at home protocols, many staff praised WHAA's concern for employee well-being by allowing the office to remain closed to outside visitors and clients. Employees also complimented WHAA for its commitment to residents and stated that they expected to be working for WHAA for the next several years. Several employees are residents who were hired into entry-level positions and promoted and were appreciative of WHAA's deliberate actions to hire residents from its Public Housing properties.

There were some concerns and perceived areas of improvement identified by staff. These included:

- Avoiding staff burnout and increasing retention
- Improving communication avenues
- Allowing for increased professional development to increase opportunities for promotions, raises and growth into the new business modelSome department heads do not apply policy/procedure to all staff the same way
- Technology needs to be routinely used more often to increase efficiency and to go paperless

Prior to the Strategic Plan process, WHAA had begun to address some of these areas of concerns, including:

- Developing a consistent onboarding process for new employees
- Completing a transition to a paperless system
- Providing training opportunities for staff to increase their knowledge and skill
- Conducting a Salary Study to identify positions that may be currently underpaid
- Initiating various communication strategies, including all-staff town hall meetings and 'Popcorn with the President - opportunities to meet with the President/CEO in a one-on-one setting

2 HOUSING PORTFOLIO AND PROGRAMS

Public Housing Units

WHAA currently owns 652 public housing units, concentrated in two large sites within 5 miles of each other in Waco (in zip codes 76704 and 76706). Across these units, WHAA maintains an average occupancy rate of 89%, which is below their goal of 97%. Part of the vacancies are due to 250 units at South Terrace³ being vacant for relocation purposes related to RAD conversion; the other vacant units are at Kate Ross and Estella Maxey. Estella Maxey has historically been challenging to lease up.

OCTOBER 2021 VACANT APARTMENT INFORMATION (PUBLIC HOUSING)			
Vacancies	Leased	Total	Occupancy %
Kate Ross	276	288	96%
Estella Maxey	311	364	85%
Overall Occupancy	587	652	90%

South Terrace, comprised of 250 units, was converted from the Public Housing program through the RAD program in November 2020. Estella Maxey just received its “Commitment to Enter Into a Housing Assistance Payment” contract (CHAP), and is projected to convert in 2023. Kate Ross Apartments is projected to convert in 2024.

WHAA also has 62 units available under Faircloth. Many PHAs today manage fewer Public Housing units than are allowed under their “Faircloth” limits – a restriction on the number of Public Housing units established by Congress in 1998. The Faircloth-to-RAD pathway provides PHAs with the ability to public housing units using HUD’s public housing mixed-finance program with pre-approval to convert the property to a RAD PBV contract after construction is completed. This new tool gives PHAs a new opportunity to increase the number of affordable units converted through the RAD program.⁴

Other Units

WHAA, through its wholly-controlled affiliate, Rising Images Inc., owns and operates 338 units of market rate housing in five apartment complexes. These market rate units were acquired by WHAA between 1994 and 2009 and are much newer than WHAA’s Public Housing portfolio. Marketed under Rising Images Inc., these units are located in zip codes with higher incomes and greater access to amenities than those zip codes where the Public Housing sites are located. These sites also have a much higher occupancy rate.

OTHER UNITS THROUGH RISING IMAGES INC.			
Site	Total Units	Vacant Units	Percentage Occupied
Cimmaron	100	0	100%
Hunnington	60	0	100%
Misty Square	16	0	100%
Picadilly	6	0	100%
Raintree	156	0	100%

³ WHAA has intentionally kept these units available to house relocating families to accommodate renovations at RAD sites undergoing conversion. Therefore, this higher than average vacancy is a temporary issue.

⁴ https://www.hud.gov/sites/dfiles/Housing/documents/Faircloth-to-RAD_Fact_Sheet.pdf

WHAA does not own any other land assets, with the exception of the property in which the main office is located and a second office building which is currently under lease to a third party entity. Neither parcel contains any vacant developable land.

Housing Choice Voucher Program

WHAA currently assists over 2,500 families through the Housing Choice Voucher program. These households are served in McLennan County (which is WHAA’s primary municipality), Hill and Somervell counties, and the city of Groesbeck.

WHAA also administers 211 special purpose vouchers:

SPECIAL PURPOSE VOUCHERS		
Special Purpose Voucher Program	Population	Number of Vouchers
VASH (Veteran Assisted Supportive Housing)	Homeless Veterans	70
Mainstream	Non-elderly disabled	80
EHV (Emergency Housing Vouchers)	Homeless	36
FYI (Foster Youth to Independence)	Homeless 25 years and younger	25

Management of Other PHA’s

WHAA provides services for three other Housing Authorities. The agency manages the Mart Housing Authority’s single public housing property located in Mart, Texas that consists of 32 low-income housing units. WHAA also administers the Project Based Voucher contract for twenty units at the Grandview Housing Authority and eighty units for the Groesbeck Housing Authority.



Other Affordable Housing Partnerships

WHAA has recently embarked upon a pathway to partner with third party private developers to facilitate the expansion of affordable housing opportunities in Waco. They have strategically chosen to work with two developers to both retain existing affordable units in the market and provide new affordable units through the Low Income Housing Tax Credit (LIHTC) program.

Trendwood Apartments is an existing 152 unit Project-Based Section 8 complex built in 1963. The development has had a troubled past, with

numerous issues related to crime and condition. The City of Waco even filed a civil lawsuit against the prior owners of Trendwood in 2019 due to code violations and unsafe living conditions. The suit was dropped in June 2021 after the owners addressed some of the issues and paid penalties of \$50,000 and in August 2021, it was announced that Steele Properties Development would partner with WHAA to purchase the property and provide approximately \$60,000 per unit in rehabilitation. Less than half a mile from Estella Maxey, the newly renovated property will help cement the changes to the neighborhood.

WHAA is also partnering with Palladium USA, Inc. a private developer, in the development of 132 units of LIHTC in Waco. The construction of these units will provide additional housing opportunities for both Housing Choice Voucher program participants and other low to moderate income families in the community.



In the city of Waco, for each unit affordable to extremely low income families (30% AMI and below), there are four families in need.

3 DEMAND FOR AFFORDABLE HOUSING

The need for quality affordable housing in the City is high. As of December 31, 2021, there are 3,006 applicants on the waiting lists for WHAA’s Public Housing and Housing Choice Voucher (HCV) programs combined. The HCV and PHV waiting lists are currently closed and the last time the HCV waiting list was opened was in September 2021, except for the Grandview PHV list, which was opened in November 2021 as part of the Grandview Housing Authority’s conversion and remains open today.

94% of both Public Housing and HCV applications are for households comprised of three or fewer persons, indicating a trend for smaller sized units. 30% of PH applicants and 16% of HCV applications are either elderly or disabled. Nearly 80% of all applicants are at or below 30% of the area median income; HCV applicants are not required to disclose their income at the time of application.

PUBLIC HOUSING AND HOUSING CHOICE VOUCHER WAITING LISTS COMBINED				
Applicants (By Family Size)	PH		HCV	
	Total	%	Total	%
1	119	31%	985	41%
2	148	38%	833	34%
3	89	23%	471	19%
4	25	6%	107	4%
5	4	1%	23	1%
6	1	0%	1	0%
7	0	0%	2	0%
8+	0	0%	0	0%
Total	386		2,422	

PUBLIC HOUSING AND HOUSING CHOICE VOUCHER WAITING LISTS (BY INCOME)						
	PH		HCV		Total	
Income	Total	%	Total	%	Total	%
Below 30%	273	78%				
30% to 50%	43	12%	HCV applicants are not tracked by income at application			
50% to 80%	20	6%				
Over 80% ⁵	12	3%				
Total	348					

A study conducted by the National Low-Income Housing Coalition found that in 2021,⁶ for the approximate 838,414 (22%) of extremely low-income households in Texas, there were only 29 affordable and available units for every 100 extremely low-income households. Additionally, for the families at or below 50% of the Area Median Income (AMI), there were only 51 units available for every 100 families.

These statistics also hold true for Waco. In the City Council’s Waco Strategic Housing Plan presentation in July 2021, the City of Waco found that for each unit affordable to extremely low income families (30% AMI and below), there were four families in need. The presentation also noted that for each unit affordable to households with incomes above 100% AMI, there were five households that could afford the unit. This is important to consider because as higher income renters need housing, they often rent lower cost housing in part because there is a lack of inventory for the higher income tier households. Lower income households, therefore, must compete not only with each other for the more affordable units (of which there are not enough), but they must also compete with higher income households that need to find housing down market.

The United Way of Waco found that over 35% of Wacoans have a high housing cost burden, and in zip codes 76701 and 76704, more than 50% of residents face this issue.⁷ This same study also found that there was a lack of diversity in housing stock in the city, with over 60% of the inventory in single family homes, and over 54% of the total rental and for sale inventory with three or more bedrooms. Not all households need, want and/or can afford a single-family, three-bedroom unit to rent or buy and when households must buy or rent units larger than they need because of a lack of inventory, this contributes to the housing affordability issue because a greater percentage of their incomes will go toward housing costs for a wrong-sized unit. This unit size mismatch is also represented in the number of smaller families on WHAA’s current PH and HCV waiting lists, which show that 74% of current applicants qualify for a one or two bedroom unit.

⁵Families over 80% of the Area Median Income may not be able to access subsidized housing through WHAA as both the Public Housing and Voucher programs are capped at 80% AMI and 50% AMI, respectively.

⁶ <https://www.nlihc.org/housing-needs-by-state/texas>

⁷ <https://www.unitedwaywaco.org/wp-content/uploads/2021/05/Waco-Child-Well-Being-Final-Report.pdf>

4 FAMILIES SERVED

WHAA provides housing to over 3,373 City of Waco households and their families. Over 2,451 of those are served directly by WHAA through the Housing Choice Voucher program; approximately 586 live in WHAA owned Public Housing, and the remaining 336 live in WHAA owned units that are made affordable through other programs. In addition, another 32 households are housed with the Mart Housing Authority, 80 through the Groesbeck Housing Authority, and 19 through the Grandview Housing Authority.

Family Profile

The families currently served by WHAA are among the most vulnerable in the city. They are predominantly extremely low income, experiencing poverty and led by an African American female head of household (note there is very little difference between those served through the public housing program and the Housing Choice Voucher program). More than 56% of households are either led by an elderly or disabled head of household (HOH), and over three quarters of all families are led by an African-American HOH. WHAA communities have a higher concentration of poverty compared to the city overall.



57%

of all households have children under 18 years, compared to **26%** in the City



73%

of families are at or below 30% AMI compared to **21%** in the City



86%

of all households are headed by a **FEMALE** compared to **15%** in the City



37%

of all households are headed by a **DISABLED** person



19%

of all households are headed by a **ELDERLY** person



76%

of all households are headed by an **AFRICAN AMERICAN**

5 SUPPORTIVE SERVICES

WHAA provides the follow types of supportive services to residents. These programs are not part of a comprehensive human capital strategy, but rather in response to specific programs such as Resident Opportunity and Self Sufficiency (ROSS) and the Family Self Sufficiency (FSS) program.

1. Family Self-Sufficiency (FSS): provides goal-oriented case management services that lead to opportunities for self-sufficiency and economic independence, including home buying education to encourage home-ownership; designed to assist residents in achieving economic independence and self-sufficiency through structured 5-year contract goals and case management.
2. Personal Self-Sufficiency and Independence: Services are provided through the Community Service department to stabilize households and help improve the overall quality of life in public housing communities. Community Service specialists who work in the communities to coordinate services with third party providers to arrange for services for individuals and families. WHAA also provides direct transportation assistance for its residents to attend various programs.
3. Youth Services: Services targeted directly to youth are provided by Youth Services Coordinators, and programs provided are to educate and enrich the lives of the under 18 population in WHAA's public housing sites. WHAA also has an Older Youth Program specifically designed for youth ages 13-18.

In 2021, WHAA engaged the services of over 50 partners to provide services to the Public Housing and HCV residents and their families housed by WHAA. Over 150 families participated in programs offered by WHAA and its partners, including 50 youth under the age of 18.

6 CONTEXT

Federal Environment

As is the case with all housing authorities across the country, most of WHAA's funding comes from the federal government through the US Department of Housing and Urban Development. WHAA receives the following sources of financing, which are restricted:

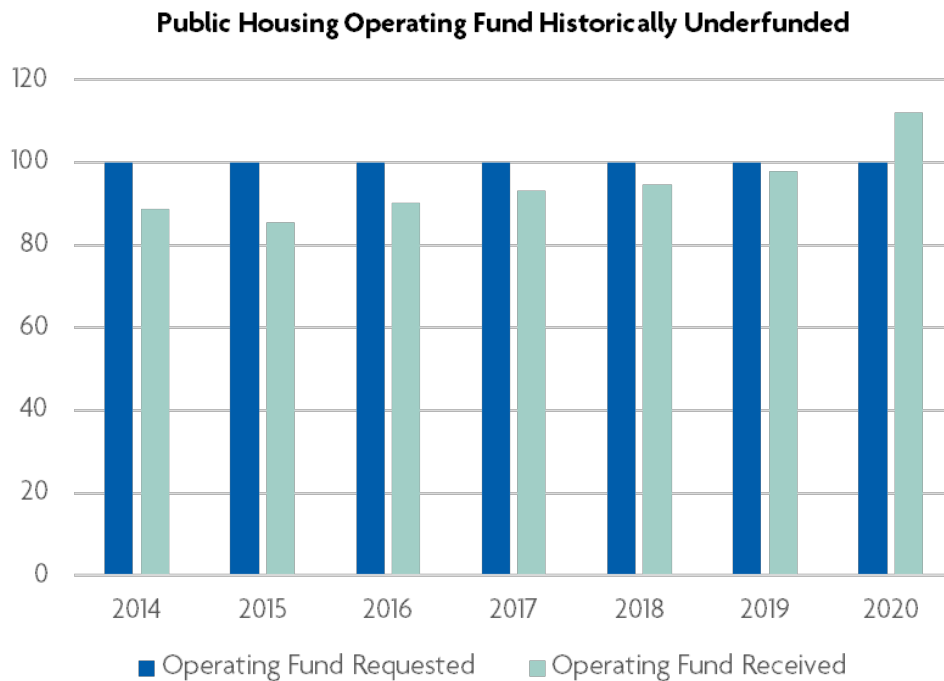
Voucher Subsidy — Housing Choice Voucher Program

For the Housing Choice Voucher (HCV) program, federal funding has historically been funded between 97% and 101% of PHA requested renewal costs. Between 2000 and 2019, federal funding has increased 45% to cover higher rents and an increased number of voucher holders and on average, the subsidy provided for a household in Section 8 is 15% higher than the average funding provided for the same household in Public Housing.⁸ WHAA has realized the benefit of this, with its HCV funding increasing from \$12,321,064 in 2010 to \$16,166,302 in 2020. This is not true of administrative fees, funds PHA's receive to administer the Housing Choice Voucher (HCV) program, which have seen a steady decrease similar the Public Housing program funds, which are discussed in the next paragraph. Comparatively, rent costs in most jurisdictions have risen year after year faster than federal increases and the while HCV has increased year over year, funding levels now support fewer voucher users based on a per user cost. As noted earlier, both nationally and locally, funding remains inadequate as rental costs continue to rise, and HCV participants find themselves competing with market-rate tenants for fewer and fewer quality units at higher rents.

⁸ <https://www.cbpp.org/research/housing/an-agenda-for-the-future-of-public-housing>

Operating Fund — Public Housing

Between 2014 and 2019, the federal government provided less funding than PHAs were due for Operating Subsidy, ranging from 85.35% to 97.77% of their annual budget requests. 2020 and 2021 saw higher than normal funding levels, due in part to COVID-19 relief funds provided to PHAs (2021 has not been closed out as of this report).⁹ In addition, from 2000 through 2019, though public housing funding overall increased in dollar amounts, funding actually dropped 17% in inflation-adjusted terms. For WHAA, in 2014 they received \$3,316,380 in Operating Subsidy and in 2020, they received \$3,430,299, an increase of a mere \$113,919 over six years.



Capital Fund — Public Housing

A Department of Housing and Urban Development analysis, conducted in 2010, found that nationwide, PHAs had a capital needs backlog of over \$26 billion, but that analysis excluded several major cost categories and estimates for actual capital needs both in 2010 and now are significantly higher. A second analysis in 2021 completed by the Center on Budget and Policy Priorities indicates that the backlog of capital needs now exceeds \$77 billion and notes that the actual number of public housing units has decreased by more than 200,000 due to demolition or deterioration.¹⁰

This same trend is evident at WHAA. Ongoing reductions to the Public Housing Operating Fund in the context of rising operating costs continue to stress and pose challenges to WHAA's ability to provide quality, timely maintenance services to residents and to quickly make-ready vacant units for re-occupancy. These challenges are further exacerbated by existing conditions for all WHAA properties, most of which have had inadequate capital investments for decades. Physical Needs Assessments conducted by WHAA in 2018 for all three Public Housing sites found that the WHAA Capital Needs in 2018 were anticipated to exceed \$39M and would accelerate to over \$61M by 2037, or \$73,760 per unit. Yet, between 2017 and 2020, WHAA received an average of \$1,735,088 in Capital Funds for all 902 units, or \$2,098 per unit per year. Based on his funding level, if WHAA continued to operate its remaining sites Estella Maxey and Kate Ross as Public Housing, it would take WHAA thirty-five years to generate enough federal funds to repair these sites.

⁹ https://www.hud.gov/program_offices/public_indian_housing/programs/ph/am/funding

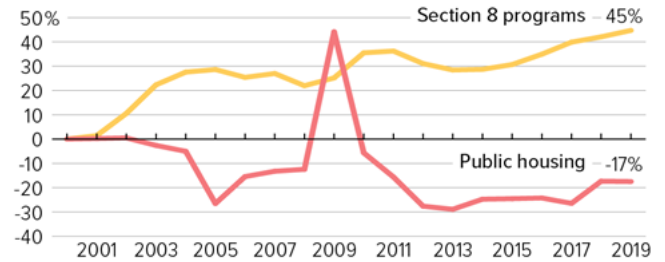
¹⁰ <https://www.cbpp.org/research/housing/an-agenda-for-the-future-of-public-housing>

CAPITAL NEEDS		
Site	2018	2037
Estella Maxey	\$14,856,688	\$22,402,157
Kate Ross	\$17,216,150	\$22,877,696
Total	\$39,906,137	\$61,114,156

CAPITAL FUNDS RECEIVED	
Year	Amount
2017	\$1,177,497.00
2018	\$1,820,616.00
2019	\$1,904,253.00
2020	\$2,037,987.00
Average	\$1,735,088.25

Public Housing Funding Has Dropped While Section 8 Funding Has Responded to Cover Rising Needs

Percent change in funding since 2000, adjusted for inflation



Note: "Public Housing" includes capital and operating funds. "Section 8 programs" includes outlays for the Housing Choice Voucher and Project-Based Rental Assistance programs. The graph reflects annual budget authority for public housing and (to avoid distortions from one-time recessions of funds and other factors) annual outlays for Section 8. Public housing funding for 2009 includes supplemental capital funds provided in economic recovery legislation. Source: Office of Management and Budget Public Use Database, Department of Treasury expenditure data, and annual appropriations legislation

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HUD Legislative Actions

During the last Administration, there was a focus on repositioning Public Housing assets out of the Public Housing (Section 9) funding platform to the Section 8 funding platform. The Department of Housing and Urban Development Office of Public and Indian Housing (PIH) sent a letter to public housing agency (PHA) executive directors dated November 13, 2018 signaling its immediate goal to "reposition" 105,000 public housing units by September 30, 2019. This was a significant increase from the average of 10,000 -15,000 PH units disposed of or demolished annually prior. In addition, HUD streamlined the conversion process, including, especially for PHA's with 250 or fewer units.

The current Administration has changed its focus to preservation through rehabilitation. In the proposed Build Back Better bill (which as of December 15, 2021 still has not passed the Senate), approximately \$65 billion will go to rehabilitate existing public housing, with a large portion expected to be earmarked for the New York City Housing Authority (which currently has a \$40B backlog of capital needs). Approximately \$25 billion will be used to expand the Housing Choice Voucher program, and an additional \$15 billion will be allocated to the Housing Trust Fund program which is used to expand and develop affordable housing.¹¹

Local Context

McLennan County has a population of 251,089 with just over half of the county's population residing in the city of Waco. A recent study published by the City of Waco¹² found that the existing issues that stakeholders and the public most frequently mentioned included:

- Lack of rental housing supply
- Low-quality of affordable housing stock
- Impact of short-term rentals on housing costs
- Need for more rental housing
- Need for affordable housing options to serve homeless youth and young adults.

¹¹ <https://www.washingtonpost.com/us-policy/2021/11/19/housing-biden-spending-bill/>

¹² Waco Strategic Housing Plan Presentation to City Council 7/20/21



There were also concerns about the recent economic boom that has attracted higher-income tourists and new residents to the city and county, increasing the demand for housing and driving up market prices. The commercial success of "Fixer Upper," a home improvement show by Chip and Joanna Gaines in Waco Texas, has been partially credited for both population growth and increased home prices.¹³ Statistically, the City of Waco and the surrounding McLennan County have experienced a nearly 11% increase in population over the last ten years. While this is lower than Texas' overall growth rate of 15.9%, it exceeds the total U.S. growth rate of 7.4%.¹⁴ Average home prices in McLennan County increased nearly 52.1% from 2015 through 2019. Several members of the community and Board expressed that it is difficult to develop new affordable housing because of exorbitantly high costs for both land and construction. According to Board members, Low Income Housing Tax Credit projects are difficult to develop as projects lose competitive points due to the low performing Waco school district.

7 FISCAL HEALTH

In general, WHAA is a healthy agency financially. Today, WHAA has an FY2021 operating budget of \$10,599,255, of which is nearly 60% derives from subsidy received from the US Department of Housing and Urban Development. This subsidy is to be used for the administration and management of both the Public Housing and Housing Choice Voucher programs, and includes fees paid to the Central Office Cost Center (COCC). WHAA has a current balance of \$4.3M in non-federal funding, and anticipates generating additional developer fee revenue from its RAD transactions over the next four years. These non-federal dollars are critical for covering any financing gaps and leverage in new developments.

¹³ <https://www.realtor.com/news/trends/did-fixer-upper-stars-chip-and-joanna-gaines-save-or-destroy-waco/>

¹⁴ <https://actlocallywaco.org/2021/09/03/county-census-data-1-total-population/>

The consolidated budget for Waco Housing Authority and Affiliates for the FY 2021 is included on the following pages 17-18.

8 COMMUNITY PERCEPTION

During the public engagement process to develop the Strategic Plan, local stakeholders including residents, advocates, and partners were asked to provide feedback and thoughts about WHAA and its current operations. Opinions varied greatly, but there was consensus around several key points.

- The public's perception of WHA is tied to the negative perception of residents of Public Housing and a stigma about housing the poor, which is not a new stigma and is faced by every Housing Authority across the country
- There is a lack of understanding about RAD and what the transition means for the sites and the community
- COVID-19 has exacerbated the difficulty of maintaining a presence in community groups and conversations
- There appears to be some confusion within the broader community about the affordable housing needs of low income families in the community and how WHAA can work with other partners to address the lack of affordable housing
- Stakeholders indicate they would like to see WHAA have more impactful communication with community partners and there is support for WHAA's intention to become more engaged in community conversations about programs to encourage greater resident self-sufficiency
- There is near universal support for development of a strategic plan and providing opportunities for stakeholder input

In general, there is not much public knowledge about WHAA and the programs it provides. Many of the stakeholders indicated a desire to see WHAA take a more proactive approach to advocating for and developing affordable housing, including becoming more involved in the development of programs and services outside of WHAA to encourage affordable housing development. Specifically, there needs to be a strong relationship with either the City or County to identify and address affordable housing needs. The City of Waco is currently developing a Strategic Housing Plan and there should be ongoing planning that includes both the City and WHAA to communicate and develop a plan in conjunction with one another.

WHAA residents are primarily concerned with the challenges in communicating with WHAA staff, especially since the offices have been closed to the public due to the pandemic. Residents, however, were complimentary overall of the agency and its program offerings, especially the transportation services provided by WHAA.



Average home prices in McLennan County increased nearly 52.1% from 2015 through 2019.

WACO HOUSING AUTHORITY AND AFFILIATES CONSOLIDATED BUDGET FY 2021

	Central Cost Center	Kate Ross	Estella Maxey	HCV	Raintree	Cimmaron	Hunnington	Picadilly	Misty Square	Total
Income										
Dwelling Rental		688,000	870,000		1,114,800	586,900	401,600	49,800	96,800	3,807,900
Excess Utilities		83,200	116,000							199,200
Non-Dwelling Rental		72,000								72,000
Total Rental Income		843,200	986,000		1,114,800	586,900	401,600	49,800	96,800	4,079,100
Mgmt. & Admin Fees Rev.	1,630,900	128,300	147,300	1,545,200						3,451,700
Donations to Scholarship Fd.					3,000					3,000
Interest on Investments	4,600	20,300	31,700	12,000	11,700	6,800	3,700	3,700	800	95,300
Other Income	1,600	63,800	80,200		38,550	25,500	11,600	2,400	3,105	226,755
Operating Transfer In		64,900	81,000							145,900
HUD Contributions		1,111,800	1,485,700							2,597,500
Total Operating Income	1,637,100	1,389,100	1,825,900	1,557,200	53,250	32,300	15,300	6,100	3,905	6,520,155
Total Income	1,637,100	2,232,300	2,811,900	1,557,200	1,168,050	619,200	416,900	55,900	100,705	10,599,255
Expenses										
Administrative Salaries	1,086,200	187,800	247,800	719,600	88,600	52,620	35,740	3,500	8,125	2,429,985
Legal	800	800	3,600	1,000	730	500	350	40	70	7,890
Staff Training and Travel	18,100	1,900	2,300	4,000	860	785	470	40	125	28,580
Audit Fees	1,000	3,400	4,200	7,000	3,250	2,070	1,275	130	280	22,605
Sundry	80,600	97,145	114,470	178,825	32,990	16,175	11,115	2,090	2,195	535,605
Mgmt. & Bkpg. Fees Exp.		300,900	379,800	293,600	289,850	152,600	104,400	5,480	10,650	1,537,280
Total Admin. Expenses	1,186,700	591,945	752,170	1,204,025	416,280	224,750	153,350	11,280	21,445	4,561,945
Total Tenant Serv. Expenses		115,600	141,000							256,600

WACO HOUSING AUTHORITY AND AFFILIATES CONSOLIDATED BUDGET FY 2021

	Central Cost Center	Kate Ross	Estella Maxey	HCV	Raintree	Cimmaron	Hunnington	Picadilly	Misty Square	Total
Expenses										
Total Utility Expenses	21,100	374,800	554,400	7,100	108,600	55,100	48,700	1,310	10,300	1,181,410
Labor		189,700	312,200		93,300	64,600	38,500	4,200	10,190	712,690
Materials	4,500	102,400	106,300	3,700	44,260	12,090	8,135	2,030	2,280	285,695
Contract Costs	42,600	388,125	439,975	21,225	122,990	43,250	39,945	8,520	14,770	1,121,400
Total Maint. & Operations	47,100	680,225	858,475	24,925	260,550	119,940	86,580	14,750	27,240	2,119,785
Employee Benefits	277,700	186,530	311,430	278,700	90,330	41,380	26,300	3,690	6,430	1,222,490
Insurance	8,900	65,100	68,000	10,750	38,710	21,890	9,500	1,290	2,460	226,600
Administrative Fees				29,800						29,800
Collection Losses		33,200	56,525		1,030	1,770				92,525
Non-Apartment Expenses					6,000	4,000				10,000
Non Routine Expenses					3,000					3,000
Depreciation Expense					185,450	92,170	60,870	3,280	32,700	374,470
Total General Expenses	286,600	284,830	435,955	319,250	324,520	161,210	96,670	8,260	41,590	1,958,885
Total Expenses	1,541,500	2,047,400	2,742,000	1,555,300	1,109,950	561,000	385,300	35,600	100,575	10,078,625
Profit/Loss	95,600	184,900	69,900	1,900	58,100	58,200	31,600	20,300	130	520,630

THE PLANNING PROCESS

The Waco Housing Authority & Affiliates Strategic Plan is the culmination of a nine-month planning process to develop an implementable road map intended to guide WHAA's future organizational decision making. The planning approach was driven by WHAA's desire to create a Strategic Plan that was informed by diverse perspectives, leveraging the expertise of WHAA employees, WHAA residents, key local stakeholders in both the public and private sector, community studies and assessments and existing data and information from surveys and focus group interviews.

The planning process encompassed four critical sequences of data collection:

1. Review and assessment of existing internal organizational plans and documents, and external assessments and studies.
2. Stakeholder engagement through interviews and focus groups¹⁵
3. Resident and Community Survey (electronic)
4. A facilitated WHAA executive team and board retreat.

BACKGROUND DOCUMENTS

The following background documents were reviewed as part of this process:

1. 2018, 2019 & 2020 WHA CFP Annual Statements
2. 2018-2022 WHA Capital Fund 5 Year Action Plan
3. 2018 PNA's for Estella Maxey, Kate Ross, South Terrace
4. 2019 City of Waco 5 Year Consolidated Plan
5. 2021 City of Waco Strategic Housing Plan Presentation to City Council
6. Waco Child Well Being Final Report
7. WHA Board Book (November 2021)
8. WHA Procurement Policy
9. Existing Mission & Vision Statement
10. Resident Survey conducted by WHAA and Tarleton State School of Social Work and Baylor University School of Social Work

STAKEHOLDER ENGAGEMENT

I. WHAA Executive Team and Board Members

EJP facilitated fifteen meetings with the WHAA Executive Team which comprised of the President/CEO, Vice-President of Financial Operations and the Vice-President of Operations. This group provided regular input and feedback throughout the development of this Strategic Plan, which stakeholders should be included in the analysis. The Executive Team was also responsible for the data gathering and collection. EJP also had one-on-one discussions with four of the five WHAA Board Members, learning about their concerns and suggestions.

¹⁵ Due to the ongoing pandemic, all community engagement activities were conducted virtually.

II. Focus Groups

Imperative to any thorough strategic planning process is the inclusion of opinions from internal and external stakeholders. EJP engaged focus groups to provide feedback and perceptions of WHAA from both an internal and external position. Focus groups were organized to receive input regarding the following major themes:

- a. Review of current vision, mission and core values
- b. Discussion of current state of the agency and perceptions of WHAA within the community
- c. Possible implications of current redevelopment and repositioning activities, specifically how these changes could impact future operations
- d. Traits the next President/CEO should have

Externally, WHAA garnered input from government officials, local stakeholders and thought leaders to get feedback regarding WHAA and their overall impact and role in the Waco and McLennan County.

WHAA employees were invited to participate in focus group discussions with their respective departments, ensuring that each department was adequately engaged in the process and the internal voice of the organization was heard. This included:

- Mid-level management
- Housing Operations and Modernization (including staff from non-Public Housing sites)
- Maintenance
- Community Services
- Housing Choice Voucher Program
- Finance and Human Resources

Each focus groups consisted of approximately 8-12 representatives, and participants were able to voice their opinions both in the group and via private discussions at a later date, if they chose.

Combined, EJP spoke with over 60 participants, to include the following community leaders who were gracious enough to share their thoughts, opinions and suggestions with EJP:

City & County Contributors

- Patricia Chisolm-Miller - McLennan County Commissioner
- Raynesha Hudson - City of Waco
- Shavon Moore, City of Waco
- Hector Sabido- City of Waco Council Member, District 2
- Susan Kincannon, Waco ISD Superintendent

Community Contributors

- Melissa Ichio- Family Abuse Center
- Marilyn Brooks- Nurse Family partnership manager
- Carlton Willis, Assistant Executive Director of Mission Waco

SURVEY

EJP and WHAA conducted an online survey designed to capture perceptions of WHAA from a broader community group. The survey was designed by EJP and administered through WHAA's direct text messaging system to its residents, as well as distributed via email to both internal and external stakeholders. Participants provided feedback on the Strengths, Weaknesses, Opportunities and Threats of WHAA. Respondents also provided their perceptions of WHAA. Though the survey was distributed to several hundred individuals (all residents, members of the Waco Continuum of Care, and others), the response rate was extremely low. In total, thirty-seven people responded, with the large majority (twenty-five) WHAA employees and only five residents participating.

BOARD RETREAT

At the conclusion of the analysis and community engagement processes, and due to COVID-19, EJP facilitated a virtual Board retreat for executive staff and the Board of Commissioners. The virtual retreat was conducted through four three-hour sessions, and facilitation tools included virtual programs such as Mentimeter and Miro, both online programs that maximize participation among its audiences. Mentimeter was used for its interactive polling features, and Miro served as a set of virtual whiteboards that allowed retreat participants to participate real-time in virtual activities designed to facilitate participation and conversation.

The board retreat exercises consisted of four interactive sessions where executive staff and board members were presented with initial findings based on EJP's assessment and then asked to respond.

The board retreat sessions were organized as follows:

Session 1: Opening Session

- a. Welcome by Executive Director touching on "why are we here?"
- b. Discussion on the purpose, goals and expectations of the Strategic Planning retreat
- c. Review the current State of the organization
- d. Brief presentation on current environment from a local, state and national perspective and possible implications for the next 5 years



Over 60 participants shared their thoughts, opinions and suggestions through focus groups and surveys.



Session 2: Mission/Vision Statements and Core Values

- a. Discuss the differences between Mission and Vision
- b. Review of current vision, mission, and core values and modify, if necessary

Session 3: Strengths, Weaknesses, Opportunities, and Threats (SWOT) and Strengths, Opportunities, Aspirations and Results (SOAR)

- a. Identify Pain Points for WHAA, considering force/ factors impacting WHAA now and in the future
- b. Discuss stakeholder perception – potential gaps between reality versus fact

Session 4: Drafting of Goals and Objectives

- a. Revisit current state of the organization
- b. Reach consensus on priorities and goals
 - Discuss success indicators and performance measures
 - Draft timelines and milestones
 - Discuss communicating the plan to internal and external stakeholders

Executive Retreat Contributors

- Malcolm Duncan, Jr., Board of Commissioners
- Shirley Langston, Board of Commissioners
- Jon Ramos, Board of Commissioners
- Connie Mack, Board of Commissioners
- Melli Wickliff, Board of Commissioners
- Milet Hopping, President/CEO
- Gloria Dancer, Vice President of Operations
- Edwina Viera, Vice President of Financial Services

THE PLAN

Strategic Plan recommendations are organized into three key areas: **PRESERVE**, **CHANGE** and **ESTABLISH**.



Preserve and expand the supply of quality housing in the community

- 1.1** Acquire and develop new units
 - 1.2** Convert existing units
 - 1.3** Align inventory to demand
-



Change WHAA business model to better align with the future direction of the agency

- 2.1** Set up systems to transition to from Public Housing to Section 8
 - 2.2** Expand the capacity to deliver contracted services to more Public Housing Agencies
 - 2.3** Diversify income streams
 - 2.4** Invest in a more robust marketing and communication plan to increase awareness and presence
 - 2.5** Develop succession plan to ensure seamless transition in the leadership of the agency
 - 2.6** Invest in existing staff and expand staff capacity to align with the development goals of the agency
 - 2.7** Improve customer service, both internal and external
-



Establish an infrastructure to better support the families that live in WHAA communities to help them transition to greater economic self-sufficiency

- 3.1** Develop an agency-wide plan that builds upon the FSS model
 - 3.2** Invest more money in supportive services
 - 3.3** Recruit and support an expanded partnership network to help deliver supportive services to clients
-



PRESERVE

Preserve and Expand the Supply of Quality Housing in the Community

WHAA’s prime mission is to provide housing that is affordable and in communities where people want to live. This includes developing housing opportunities that are available for multiple demographics, and can lead to permanent, long-term housing opportunities. As indicated in the City of Waco study and borne out by WHAA’s current PH and HCV waiting lists, there is a greater need for smaller size affordable units in the community. WHAA needs to proactively look for opportunities beyond simply converting existing Public Housing developments to increase the stock of affordable housing units in Waco. At the same time, WHAA needs to increase the number of families who are transitioning out of the PH and HCV programs into single family homeownership, thereby providing more opportunities for families to access existing housing. WHAA also desires to ensure that its elderly populations are able to access safe, affordable housing in communities with accessible services to allow them to age in place.

1.1 ACQUIRE AND DEVELOP NEW UNITS

Tasks

1. Encourage and develop income diverse communities utilizing Low Income Housing Tax Credits (LIHTC)
2. Identify strategic under-performing affordable and market rate properties in higher opportunity areas and aggressively pursue acquisition opportunities
3. Increase homeownership opportunities through the acquisition and rehabilitation of single family homes, such as tax delinquent substandard homes, and in partnership with agencies such as Habitat for Humanity, Grassroots, Neighborworks, or Prosper Waco.
4. Coordinate with the City to identify and focus City funds in strategic neighborhoods that align with WHAA priorities and City economic and community revitalization effort

Success Measures

- Develop one new Income Diverse communities by 2026
- Expand into higher opportunity areas through targeted acquisition and/or development
- Increase number of successful homeowners by 15 by 2022
- Increase unit bedroom counts for 1’s and 2’s
- Initiate/ implement public private partnership fund such as a Social Impact Real Estate Investment Trust (REIT)

Timeline

Ongoing



1.2 CONVERT EXISTING UNITS

<p>Tasks</p>	<ol style="list-style-type: none"> 1. Continue to convert Public Housing units to the Housing Choice Voucher (HCV) program through RAD 2. Utilize HUD Faircloth to RAD Conversion tool to increase number of Public Housing units converted to RAD
<p>Success Measures</p>	<ul style="list-style-type: none"> • Complete RAD conversion • Add 62 Faircloth Units through a Faircloth to RAD Conversion
<p>Timeline</p>	<p>Years 1-5</p>

1.3 ALIGN INVENTORY TO DEMAND

<p>Tasks</p>	<ol style="list-style-type: none"> 1. Increase number of one and two bedroom units through new development and/or acquisition 2. Increase number of units targeted towards seniors
<p>Success Measures</p>	<ul style="list-style-type: none"> • Increased number of one and two bedroom units by 30% • Increase number of units targeted towards seniors by 50
<p>Timeline</p>	<p>Years 1-5</p>



CHANGE

Change WHAA Business Model to Better Align with the Future Direction of the Agency

WHAA is on the cusp of a paradigm shift, moving away from the traditional Public Housing business model to a more entrepreneurial, private market business model. First, in order to successfully change the operations of the agency, WHAA needs to invest not only in their communities, but in their workforce. By ensuring that employees are provided with every opportunity they need to succeed, including both technical systems and training and learning opportunities, WHAA can feel confident that their employees are well-positioned and prepared to take on modified or new roles within the agency. Secondly, Federal funding streams are historically unreliable and insufficient to sustain and maintain WHAA's properties and operations. WHAA has taken the first step to ensure its long-term sustainability by developing non-federal revenue streams that can be utilized to further WHAA's long term goals but should continue to look for new and creative ways to access funds to accomplish their goals. Thirdly, with the retirement of the current President/CEO on the horizon, the Board of Commissioners needs to be proactive in beginning to plan for this transition by developing a succession plan that considers not only what traits the next WHAA leader should hold, but also consider the capacity and desire of existing leadership to transition into this role. Lastly, change is not completed in a vacuum. In order to ensure that the changes WHAA is embarking upon benefit the end client – the resident – WHAA needs to hear directly from their consumers through regular and constructive feedback.

2.1 SET UP SYSTEMS TO TRANSITION FROM PUBLIC HOUSING TO SECTION 8

Tasks	<ol style="list-style-type: none">1. Identify current gaps in technology and business infrastructure2. Acquire necessary software systems or other business tools that will improve the efficacy of staff operations in the future
Success Measures	<ul style="list-style-type: none">• Investment in new technology and infrastructure systems
Timeline	Year 1

2.2 EXPAND THE CAPACITY TO DELIVER CONTRACTED SERVICES TO MORE PUBLIC HOUSING AGENCIES

Tasks	<ol style="list-style-type: none"> 1. Leverage current experience as a HCV Contract Administrator to identify and expand contract administration roles for PHAs converting their Public Housing portfolio to the voucher program 2. Work with the HUD Field Office to identify PHAs in the area who are troubled or in need to management assistance and oversight
Success Measures	<ul style="list-style-type: none"> • Additional contract management agreements • Additional PHAs under management agreement
Timeline	Ongoing

2.3 DIVERSIFY INCOME STREAMS

Tasks	<ol style="list-style-type: none"> 1. Leverage experience as a property manager and identify market rate properties in need of new management 2. Identify grant resources and other federal, state and local dollars that can be used to fund programs and activities
Success Measures	<ul style="list-style-type: none"> • Additional non-federal revenue sources identified and accessed
Timeline	Ongoing

2.4 INVEST IN A MORE ROBUST MARKETING AND COMMUNICATION PLAN TO INCREASE AWARENESS AND PRESENCE

Tasks	<ol style="list-style-type: none"> 1. Create a communications plan for external stakeholders 2. Create a more accessible social media presence
Success Measures	<ul style="list-style-type: none"> • Development of a communications plan and strategy • Update the website to be more user friendly
Timeline	Year 1

2.5 DEVELOP SUCCESSION PLAN TO ENSURE SEAMLESS TRANSITION IN THE LEADERSHIP OF THE AGENCY

Tasks	<ol style="list-style-type: none"> 1. Identify priority traits, experience and characteristics for the next President/ CEO 2. Identify current staff and develop their capacity to lead the agency in a transitional or permanent role
Success Measures	<ul style="list-style-type: none"> • Development of a succession plan • Staff development to ensure that existing staff can continue to lead the agency during the transition
Timeline	Year 2

2.6 INVEST IN EXISTING STAFF AND EXPAND STAFF CAPACITY TO ALIGN WITH THE DEVELOPMENT GOALS OF THE AGENCY

Tasks	<ol style="list-style-type: none"> 1. Provide a living wage 2. Increase staff capacity, professionalism and effectiveness
Success Measures	<ul style="list-style-type: none"> • Revise and update job requirements to reflect higher level of qualifications prior to salary study completion • All employees have received a Certification in their area of operation by 12 months of hire (as applicable) • Provide additional professional development opportunities for increasing level of qualifications • Implement a Professional Development Curriculum for new hires within the first 90 days of hire • Develop and provide training opportunities for current employees as job requirements/ business model change from public (government) to private management model
Timeline	Years 1-5



2.7 IMPROVE CUSTOMER SERVICE, BOTH INTERNAL AND EXTERNAL

Tasks

1. Implement regular customer satisfaction survey
2. Improve resident satisfaction metrics
3. Initiate a bi-annual resident town hall meeting
4. Expand current employee communication methods
5. Initiate external stakeholder working groups and annual charette.

Success Measures

- Complete customer satisfaction survey quarterly
- Increase overall resident participation in survey each year with a goal of 50% participating
- Increase percentage of satisfied residents to 80%
- Implement a bi-annual resident town hall to share information with residents and to get input and feedback on direction of the agency
- Implement additional forums to share information with internal staff

Timeline

Ongoing



ESTABLISH

Establish an Infrastructure to Better Support the Families that Live in WHAA Communities to Help Them Transition to Greater Economic Self-Sufficiency

Resident empowerment programs are based on availability through other service providers and are not necessarily comprehensive in their approach. WHAA intends to create pathways of opportunities for all WHAA residents, regardless of income level or housing program type, to encourage them to become self-sufficient (as applicable and able) or to just improve their overall quality of life.

3.1 DEVELOP AN AGENCY-WIDE PLAN THAT BUILDS UPON THE FSS MODEL

Tasks	<ol style="list-style-type: none"> 1. Create and implement a self-sufficiency program that non-Public Housing and HCV families, such as those in the LIHTC and market/affordable units 2. Identify potential funding sources 3. Identify staffing needs and partners 4. Implement program 5. Increase enrollment in workforce training programs for work-eligible individuals
Success Measures	<ul style="list-style-type: none"> • Enrollment of market/affordable and LIHTC residents in the newly created agency self-sufficiency program
Timeline	Year 1

3.2 INVEST MORE MONEY IN SUPPORTIVE SERVICES

Tasks	<ol style="list-style-type: none"> 1. Expand Community Services Department
Success Measures	<ul style="list-style-type: none"> • Identify current programs and services provided both in-house and by third party providers • Identify additional programs/ services/ responsibilities that need to be filled or initiated • Create new staff roles/ positions to fill newly identified roles.
Timeline	Years 1-5



3.3 RECRUIT AND SUPPORT AN EXPANDED PARTNERSHIP NETWORK TO HELP DELIVER SUPPORTIVE SERVICES TO CLIENTS

<p>Tasks</p>	<ol style="list-style-type: none"> 1. Review existing delivery of services to identify gaps in programs 2. Identify partners or internal capacity to provide services to develop a holistic approach to self-sufficiency and resident empowerment programs
<p>Success Measures</p>	<ul style="list-style-type: none"> • Creation of a comprehensive slate of programs to cover the continuum of self-sufficiency needs
<p>Timeline</p>	<p>Years 1-5</p>

ACTION PLAN (YEAR 1)

Preserve

1. Identify pathways to increase number of successful homeowners .
2. Establish public-private partnership fund such as a Social Impact Real Estate Investment Trust (REIT).
3. Complete RAD Conversion for South Terrace and receive an allocation of LIHTC for Estella Maxey RAD conversion.

Change

1. Investigate new technology and infrastructure systems and begin replacing most critical ones.
2. Identify regional PHA's in need of technical assistance and management oversight and secure one management contract.
3. Add one additional HCV management agreement by the end of 2023.
4. Develop a Leadership Succession Plan by 2023.
5. Implement a comprehensive staff development program to support leadership transition.
6. Revise and update job requirements to reflect higher level of qualifications prior to salary study completion.
7. Offer professional development opportunities to align transitioning from public (government) to private management model.
8. Create and implement a professional development curriculum for new employees.
9. Develop Communications Plan for both internal and external stakeholders.
10. Rebrand the agency.
11. Update to a more user-friendly website.
12. Reach out to external stakeholders and begin developing deeper relationships with community groups.
13. Initiate stakeholder working groups on multiple affordable housing and community development topics and develop action agendas.

Establish

1. Create and implement a self-sufficiency program for non-Public Housing and HCV families.
2. Review current Community Services slate of programs to identify gaps in services and create a comprehensive curriculum of programs to cover the continuum of resident needs
3. Within the Community Services department, identify additional programs/services/ responsibilities and create staffing plan to fill newly identified roles.
4. Identify potential funding sources, staff and partners for new programs.
5. Implement customer satisfaction survey to be completed quarterly.
6. Implement bi-annual resident town hall meeting.

ACKNOWLEDGEMENTS

We are pleased to acknowledge all the support and assistance that has helped to make WHAA's inaugural Strategic Plan possible. We are grateful for the diversity of perspectives and ideas from residents, staff and board members, elected officials, community members, and multiple City of Waco departments.

We thank everyone who provided access to data, participated in the survey and the SWOT analysis, attended a meeting or participated in a focus group.

WHAA's Strategic Plan was designed and prepared by EJP Consulting Group, LLC. Team members include Rhae Parkes, Naomi Byrne, Chelsea Liedstrand, and Lauren Williamson.

