



# STRATEGIC PLAN

Prepared by EJP Consulting Group, LLC



## 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 "Milet Hopping". The signature is written in a cursive, flowing style.

Milet Hopping, WHAA director



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### **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.

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# 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](http://wacopha.org) site to learn more.

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

## 1.3 ALIGN INVENTORY TO DEMAND

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

<b>Tasks</b>	<ol style="list-style-type: none"><li>1. Identify current gaps in technology and business infrastructure</li><li>2. Acquire necessary software systems or other business tools that will improve the efficacy of staff operations in the future</li></ol>
<b>Success Measures</b>	<ul style="list-style-type: none"><li>• Investment in new technology and infrastructure systems</li></ul>
<b>Timeline</b>	Year 1

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

<b>Tasks</b>	<ol style="list-style-type: none"> <li>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</li> <li>2. Work with the HUD Field Office to identify PHAs in the area who are troubled or in need to management assistance and oversight</li> </ol>
<b>Success Measures</b>	<ul style="list-style-type: none"> <li>• Additional contract management agreements</li> <li>• Additional PHAs under management agreement</li> </ul>
<b>Timeline</b>	Ongoing

## 2.3 DIVERSIFY INCOME STREAMS

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

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

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

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

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

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

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

<b>Tasks</b>	<ol style="list-style-type: none"> <li>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</li> <li>2. Identify potential funding sources</li> <li>3. Identify staffing needs and partners</li> <li>4. Implement program</li> <li>5. Increase enrollment in workforce training programs for work-eligible individuals</li> </ol>
<b>Success Measures</b>	<ul style="list-style-type: none"> <li>• Enrollment of market/affordable and LIHTC residents in the newly created agency self-sufficiency program</li> </ul>
<b>Timeline</b>	Year 1

#### 3.2 INVEST MORE MONEY IN SUPPORTIVE SERVICES

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



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

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

