

Strategic Goal 1: Portfolio Redevelopment and Positioning

LMHA will continue its successful initiatives to completely redevelop, replace, and modernize its entire portfolio of residential developments as well as furthering options to better serve low-income and homeless residents through creatively increasing voucher units and utilization, non-traditional affordable housing, and market rate housing. Key considerations in these new initiatives will be providing for mixed-income communities, furthering housing choice, investing in and engaging stakeholders in neighborhood community building, striving for investment without displacement, providing for broadband connectivity and furthering racial equity. LMHA will be a leader in sustainability and green practices utilized in new and modernized developments, as well as in agency operations. High standards of asset management and maintenance will ensure that properties continue to be the highest quality of housing in their neighborhoods.

Action Plan Lead: Jeff Ralph

Objective 1A: Complete a comprehensive physical needs assessment of the portfolio/determine capital needs / long-range budgeting for modernization.

Benchmark 1A1: Complete a comprehensive physical needs assessment of 100% of the LMHA portfolio of properties. (11/1/2021)

July 2021

Developing a strategy to determine the properties that will benefit from a Physical Needs Assessment or the RAD CNA e-Tool (Capital Needs Assessment). An RFP is being written to procure a consultant to perform the Assessments.

August 2021

A draft RFP is being circulated to key staff for review. The RFP will be for a RAD Physical Conditions Assessment and CNA e-Tool.

Benchmark 1A2: Utilize the needs assessment to prioritize assets to schedule upgrades and modernization or repositioning in 2021 and 2022. (1/1/2022)

ON HOLD

On hold until the PNAs and/or CNAs are received. Resume November 2021.

Benchmark 1A3: Prepare the budget workups and budgeting timelines / strategies for implementation in 2022 and 2023. (3/1/2022)

ON HOLD

On hold until the PNAs or CNAs are prepared. Resume January 2022.

Objective 1B: LMHA will formulate redevelopment plans and implementation strategies for properties that are deemed to be in a state of functional obsolescence.

Benchmark 1B1: Engage community stakeholders in the planning and investment for strategies for properties that are deemed to be in a state of functional obsolescence. (1/1/2022)

ON HOLD

Determination of functional obsolescence will made when the PNAs and/or CNA's are received. Resume November 2021.

Benchmark 1B2: Prepare the budget workups and budgeting timelines / strategies for implementation properties that are deemed to be in a state of functional obsolescence. 4/1/2022)

ON HOLD

Budgets and timelines will be prepared upon determination of functional obsolescence. Resume January 2022.

Objective 1C: LMHA will provide for additional housing to reduce the affordable housing gap that may include more vouchers, market rate housing, housing for people experiencing homelessness, and acquisition of properties coming out of affordability.

Benchmark 1C1: Apply for any available emergency housing assistance related to COVID-19. (5/10/2021)

ON HOLD

As of 5/10/2021 LMHA has received 129 Emergency Housing Vouchers.

As opportunities become available, the team will continue to pursue emergency housing assistance opportunities for the duration of the pandemic or declaration of emergency.

Benchmark 1C2: Explore transitional housing options for those experiencing homelessness.
(12/1/2021)

June 2021

Transitional housing options are being explored by an LMHA team. While several properties are being evaluated, LMHA and the stakeholders have not determined a location and specific program that best meets the target population's needs.

ON HOLD

This Benchmark is ON HOLD until a specific property or properties has been identified.

Objective 1D: LMHA will utilize its MTW funding flexibility and regulatory waivers to increase HCV leasing efficiencies and streamline processes and to fund non-traditional affordable housing opportunities.

Benchmark 1D1: Utilize the tools above to meet substantially the same commitments.
(6/30/2022)

May 2021

A Corrective Action Plan has been approved by HUD. Future year budgets are being reviewed to evaluate operations and reserves. Strategies will involve consideration of substantially the same commitments.

ON GOING

[Above action is On Going](#)

Objective 1E: LMHA will evaluate the merits of placed based versus deconcentration investments and the options for investment without displacement that factors in resident preference and community stability.

Benchmark 1E1: For functionally obsolete properties, examine the benefits of place based strategies versus deconcentration. (4/1/2022)

ON HOLD

On hold until specific properties are identified as obsolete. As plans are made for obsolete properties, consideration will be given to placed based strategies versus deconcentration. Resume January 2022.

Objective 1F: LMHA will deconcentrate low-income housing and further housing choice through mixed-income developments that are situated throughout all Louisville Metro neighborhoods. (6/30/2022)

Benchmark 1F1: Provide support to CNI/PBV off-site awardees.

June 2021

Bi-weekly reoccupancy calls address lease-up of all PBV off-site projects. Heather Hairgrove is arranging for a meeting with Donerail to introduce Choice and PBV.

July 2021

Bi-weekly reoccupancy calls address lease-up of all PBV off-site projects. A meeting with Donerail and LMHA staff on July 7 provided an overview of the Choice PBV requirements. A second meeting is scheduled on Aug 3 to discuss compliance issues.

August 2021

LMHA staff met with Donerail developer and property management. Offer letters were sent to Beecher residents on 8/10/2021.

Objective 1G: LMHA will factor fair housing and racial equity as well as broadband connectivity and green buidling and sustainability practices in all redevelopment, aspects of the as key considerations expansion and repositioning of the portfolio.

Benchmark 1G1: Define and determine best measurement practices for racial equity and fair housing. (6/30/2022)

June 2021

Not yet began

July 2021

Began review of resources available from the Government Alliance on Race & Equity.

August 2021

No Progress

Benchmark 1G2: Ensure all substantial rehab, new construction and comprehensive modernization plans contain broadband connectivity standard. (6/30/2022)

June 2021

As development efforts are planned, the above goal will be pursued.

ON HOLD

This Benchmark is ON HOLD until there are new development efforts.

Benchmark 1G3: For all substantial rehab, new construction and comprehensive modernization incorporate green building and sustainability practices to the greatest extent possible. (6/30/2022)

June 2021

As development efforts are planned, the above goals will be pursued.

ON HOLD

This Benchmark is ON HOLD until there are new development efforts.



Objective 1H: LMHA will engage community stakeholders in the planning and investment in affordable housing developments and other amenities and services that will enhance community building.

Benchmark 1H1: Develop community building and engagement plan for larger scale developments. (6/30/2022)

ON HOLD

On hold until specific properties are identified as obsolete. Resume January 2022.

Strategic Goal 2: Human Resources Management/Capacity Building

LMHA will promote its commitment to equal employment and affirmative recruitment (racial equity, diversity, and inclusion), open communication, succession planning and quality enterprise-wide customer service. LMHA will apply best practices in recruitment, training and retention, professional development, recognition, and rewards in being an inclusive, progressive employer of choice. This goal will be accomplished through utilizing the Human Resources Department as a centralized function with input from other departments and feedback from an employee satisfaction survey.

Action Plan Lead: Joyce Babb

Objective 2A: LMHA will review and update human resources policies and practices that will position the agency as a progressive employer of choice in recruitment, retention, and succession planning.

Benchmark 2A1: Review policies and practices in relation to current human resources practices and survey results. (1/31/2022)

ON HOLD

Review of policies and practices pending survey results. New Paid Family Leave policy to be implemented effective July 1, 2021.

July 2021

Review of emp survey results completed. In process of developing Action Plan which will include reviewing policies and practices in relation to current HR practices and survey results.

August 2021

Personnel policies are being amended in relations to current LMHA practices. LMHA's Concealed Weapons policy was amended and distributed to all LMHA employees.

Benchmark 2A2: Present human resources policies and practices to Board of Commissioners and Management Team. (4/30/2022)

ON HOLD

Pending completion of Benchmark 2A1

Benchmark 2A3: Implement and distribute new human resources policies and practices and train staff. (6/30/2022)

ON HOLD

Pending completion of Benchmarks 2A1-2

Objective 2B: LMHA will create a culture where employees embrace change, adapt to changing work environments, and provide for a culture of opportunity for all employees.

Benchmark 2B1: Identify good and bad parts of LMHA's culture (traditional practices, customs & rituals). (10/15/2021)

ON HOLD

Pending employee satisfaction survey results.

July 2021

Review of emp survey results completed. Discussed culture concerns expressed in survey. Development of Plan to address concerns pending.

August 2021

In process of writing action plan. Training & communication concerns identified in emp satisfactin survey also identified in skills assess survey. Action plan will address areas of concerns identified in both surveys.

Benchmark 2B2: Identify and prioritize areas for improvement. (1/31/2022)

ON HOLD

Pending results of the job skills assessment survey and employee satisfaction survey results. Data from these surveys will assist with identifying and prioritizing areas needing improvement.

July 2021

Survey results reviewed and discussed. In process of developing Action Plan.

August 2021

In process of writing action plan to address areas of concern identified in employee satisfaction survey and skills assessment survey. As part of the action plan, revised initial step of RFP process.

Benchmark 2B3: Begin long term implementation of cultural adaptation. (On-going beginning 2/1/2022)

May 2021

Have not begun.

June 2021

On Hold - Expect to begin reporting 2/1/2022.

Objective 2C: LMHA will provide for a comprehensive assessment of the current skill sets of staff and how these skills match up with the talents and abilities needed to be a future high performing agency.

Benchmark 2C1: Survey department managers as to what skills sets are needed to be successful in the future and to what extent do employees have those skills. (7/31/2021)

May 2021

All surveys have been distributed to the appropriate department heads. The deadline for submitting surveys has expired. Approximately 80% of the surveys were completed and submitted. The team is currently assessing the survey results.

June 2021

As of July 1, 2021 all surveys have been thoroughly reviewed for

feasibility and consideration. The next step is to discuss with each department head how to best implement the approved requests for training and additional job positions.

July 2021

We are still in the process of discussing our survey results and findings with the appropriate department heads.

August 2021

Discussions of survey results with appropriate department heads completed. Needs/concerns identified through these discussions will be included in the HR action plan.

Objective 2D: LMHA will provide for external hires and other options such as outsourcing to infuse new ideas and approaches to meet changing needs and priorities of the agency. (6/30/2021)

Benchmark 2D1: Create report on past internal vs. external hires and the extent of outsourcing - last 3 years.

May 2021

The report on past internal vs. external hires and the extent of outsourcing for the last 3 years has been completed. BENCHMARK COMPLETED.

Objective 2E: LMHA will evaluate all departments for diversity, inclusion, race equity, and compensation fairness and provide for action plans to address any departments lacking such standards.

Benchmark 2E1: Define acceptable standards for diversity, inclusion, race equity and compensation fairness. (6/30/2021)

June 2021

In progress.

ON HOLD

Placed on Hold - Expect to resume reporting in December 2021

Benchmark 2E2: Utilize data from employee survey for determining inclusion. (11/1/2021)

ON HOLD

Pending assessment of survey results.

July 2021

Survey results reviewed and discussed with consultant and committee.

August 2021

In progress to determine any inclusion concerns.

Benchmark 2E3: Develop plan to correct any issues identified. (3/31/2022)

ON HOLD

On hold pending review of data from employee satisfaction survey.

July 2021

Survey results reviewed. In process of developing Action Pan.

August 2021

In progress.

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Objective 2F: LMHA will provide for training and professional development plans that will be fair and equitable to all employees.

Benchmark 2F1: Based on department surveys identify sources for training and professional development needed. (2/28/2022)

ON HOLD

On hold pending completion of review of job skills assessment survey.

July 2021

Review of job skills assessment survey completed. In process of talking with Depart. Heads to better identify/clarify training & professional development needs and potential training sources.

August 2021

Discussions with Department Heads completed. Needs/concerns identified through these discussions will be included in the HR action plan.

Benchmark 2F2: Train staff. (On-going beginning 6/1/2022)

ON HOLD

On hold pending determination of need(s) from job skills assessment and employee satisfaction surveys.

July 2021

In process of determining/clarifying needs and developing a training plan.

August 2021

In progress.

Objective 2G: LMHA will implement an annual employee satisfaction survey.

Benchmark 2G1: Designing survey document with team and consultant. (7/31/2021)

May 2021

The team secured the services of "The Organizational Leadership Edge" consulting firm to assist with the design of the employee satisfaction survey document. Development of the survey document has been completed.

June 2021

Deadline for return of the survey was June 4th.

July 2021

This Benchmark has been COMPLETED.

Benchmark 2G2: Send survey to employees. (8/31/2021)

May 2021

The employee satisfaction survey has been sent to all employees. Employee responses are anonymous. Completed surveys are to be returned to The Organizational Leadership Edge (TOLE) by June 4, 2021.

June 2021

Survey responses were received and forwarded to TOLE for analysis. Preliminary scoring of the results received for review by the team. TOLE's narrative of perspectives and recommendations on the survey results is pending.

July 2021

TOLE's narrative has been completed, received, reviewed and discussed by the committee and TOLE. This Benchmark has been COMPLETED.

Benchmark 2G3: Analyse Survey Results. (10/15/2021)

ON HOLD

On hold until surveys are returned and processed by The Organizational Leadership Edge. Expected to resume reporting in August 2021.

July 2021

Survey results have been reviewed. In process of developing Action Plan. Survey results are still being analysed to identify any "inclusion" concerns.

August 2021

In progress

Strategic Goal 3: Self-Sufficiency and Independent Living Outcomes

LMHA will ensure that all residents are linked to the critical support services including digital literacy and broadband connectivity that will provide opportunities for self-sufficiency for families and/or independent living for the elderly and persons with disabilities. LMHA will partner with public and private entities in workforce development to provide job training and placement opportunities that prepare residents not just for today's living wage jobs, but for the jobs of tomorrow, the future of work. It will be the expectation that residents that are capable of transitioning into the workforce and out of assisted housing will participate in self-sufficiency initiatives and will transition into market rate rental housing or homeownership. Independent living programs and services participation will continue to be expanded for all elderly and/or persons with disabilities.

Action Plan Lead: Dan Farrell

Objective 3A: LMHA will increase its commitment to strategies, practices and performance metrics that will result in increases in the success rates of working families transitioning out of assisted housing.

Benchmark 3A1: Define metrics that will be utilized to determine "success rate" of working families transitioning out of assisted housing. (8/31/2021)

May 2021

Special Programs team has identified potential "success rate" metrics with the next step of determining the feasibility of pulling the needed information from LMHA's current and future software systems.

ON HOLD

After consulting the Yardi implementation team, final public housing & Housing Choice Voucher success metrics will be finalized after each of those programs goes live in Yardi. This will push out the next two Benchmarks several months.

Benchmark 3A2: Establish Baseline measurements based on metrics, evaluate annually thereafter. (9/30/2021)

ON HOLD

On hold until Benchmark 3A1 is completed.

Benchmark 3A3: Set goals that will be measured annually against baseline metrics. (12/31/2021)

ON HOLD

On hold until Benchmark 3A2 is completed.

Objective 3B: LMHA will facilitate the linkages, both public and private, of residents with sustainable wage employers and support services providers that will improve self-sufficiency results and transitions out of assisted housing with an emphasis on the jobs of tomorrow.

Benchmark 3B1: Explore Workforce Development Board's relationship with Chamber of Commerce and employers, determine points of entry. (6/30/2021)

May 2021

Requested meeting with KentuckianaWorks and Career Centers teams.

June 2021

Working with KentuckianaWorks to schedule July 2021 meeting. Also, have reached out to GLI to connect with their new Career Acceleration Network.

July 2021

Met with KentuckianaWorks team and will retrain LMHA team on access to their systems. Team is also ready to make referrals to GLI's Career Acceleration Network after informational meeting.

August 2021

Received and reviewed system access refresher from KentuckianaWorks. Special Programs team has begun referrals to GLI.

Benchmark 3B2: Develop improved communication methods for reaching residents regarding employment and training opportunities. (12/31/2021)

May 2021	Not yet begun
June 2021	Not yet begun
July 2021	Participated in demonstration of potential email/text notification system.
ON HOLD	This is ON HOLD until a new email/text notification system is chosen.

Benchmark 3B3: Explore Incentives for resident participation in workforce training / maintaining employment / reaching benchmarks. (3/1/2022)

ON HOLD	Will begin fall 2021
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Objective 3C: LMHA will improve the staff capacities and resource materials to be able to advise residents on support services available in the community. (3/1/2022)

Benchmark 3C1: Develop a plan to increase LMHA staff access to Unite Us and LouieConnect, train staff on use. (9/30/2021)

May 2021	Special Programs team organized LouieConnect training for Property Management Team. In the process of determining staff outside of Special Programs to have access and training for UniteUs referral
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platform.

June 2021

Two Property Management team members and one HCV team member have been enrolled in UniteUs referral program. One has been trained and two are pending training.

July 2021

Remaining two employees now trained. The only remaining action is to onboard and train any future team members and provide support in using the systems. COMPLETED.

Benchmark 3C2: Work with resident councils to evaluate resident communication methods and develop strategies to improve. (9/30/2021)

May 2021

Met with resident councils at Dosker, Avenue Plaza, St Catherine Ct and Lourdes Hall to solicit ideas for improved communications.

June 2021

Resident councils have created a list of suggested ways to improve communications with residents.

July 2021

Working with Resident Councils on implementing most feasible strategies.

ON GOING

These efforts with Resident Councils is now on going and the Benchmark COMPLETED.

Objective 3D: LMHA will increase the number of families connected to low or no-cost broadband and improve digital skills.

Benchmark 3D1: Develop digital skills plans (Remote & In-person Options). (8/1/2021)

May 2021 Developing survey/assessment for residents who receive broadband services and/or refurbished computers.

June 2021 Survey developed, planning on best method to deliver and record results.

July 2021 No progress in July.

August 2021 No progress in August due to renewed COVID surge.

Benchmark 3D2: Begin to offer Digital Skills classes. (8/15/2021)

ON HOLD On hold until Benchmark 3D1 is completed.

Benchmark 3D3: Utilize communication strategies developed in 3B and 3C to rollout information to residents re: broadband assistance. (12/31/2021)

May 2021 Developed flyer to increase the number of Parkway residents signed up for Spectrum broadband.

June 2021

No progress during month

July 2021

Reaching out by phone and in-person to Parkway residents to increase the number of households connected.

August 2021

Planned in-person outreach at Parkway for September.

Objective 3E: LMHA will expand its on-site support services and social interaction opportunities in its high-rises to provide for improved independent living and quality of life.

Benchmark 3E1: Identify space in high rises for service providers to visit and work with residents on-site (group and confidential spaces) - include Zoom. (3/31/2021)

May 2021

Identified potential space at Avenue Plaza, Dosker Manor, Lourdes Hall, Noltemeyer Wynde, St Catherine Court, Will Seay Plaza and Parkway Place. BENCHMARK COMPLETE

Benchmark 3E2: Outreach to residents to define needed / desired services. (6/30/2021)

May 2021

Met with resident councils at Dosker, Avenue Pl, St Catherine Ct and Lourdes Hall to assist in determining needs and will utilize Resident Opportunity & Self Sufficiency Survey of 600+ PH residents.

June 2021

A list of services and service providers to reach out to created.

July 2021

As LMHA's reopening approaches, verifying that spaces at each development are safe and usable.

August 2021

With new COVID surge, department is determining best timing and approach.

Benchmark 3E3: Outreach to service providers to determine interest in participation.
(9/30/2021)

ON HOLD

On hold until Benchmark 3E2 completed and COVID-19 restrictions are lifted.

ON HOLD

Still ON HOLD with new surge.

Objective 3F: LMHA will increase the commitment to initiatives that further homeownership preparedness and transitions to being a homeowner.

Benchmark 3F1: Identify available financial skills programs (in-person & on-line). (6/30/2021)

May 2021

Began development of a list of available financial skills programs.

June 2021

List of available programs completed.

July 2021

Special Programs is participating in the planning of Louisville Metro Governments new Financial Empowerment Center, funded by Bloomberg Philanthropies. LMHA plans to partner in this effort to bring financial advisors to the families we serve.

August 2021

Attended Financial Empowerment Center Advisory Group meeting.

Benchmark 3F2: Develop and implement HCV Homeownership marketing plan (external & internal). (9/30/2021)

May 2021

HCV Homeownership staff has met to develop initial ideas. Next step is to meet with public affairs officer.

June 2021

HCV Homeownership staff has met Public Affairs Officer to begin development of marketing plan, website and other recruitment materials.

July 2021

Working on new brochure and current LMHA website has been updated.

August 2021

Developed new HCV Homeownership Brochure.

Benchmark 3F3: Develop distribution and referral processes. (12/31/2021)

ON HOLD

On hold until completion of Benchmark 3F2.

Objective 3G: LMHA will expand the employment and contracting opportunities and pipelines for Section 3 residents and MBE/WBE businesses.

Benchmark 3G1: Develop outreach plan for residents. (8/31/2021)

May 2021

Developing SmartSheet to better manage interested Section 3 applicants.

June 2021

SmartSheet is undergoing revisions.

July 2021

Online form for Section 3 Applicant registration is complete and ready to put on the website.

ON HOLD

ON HOLD until form can be added to LMHA website.

Benchmark 3G2: Implement the outreach plan. (9/15/2021)

ON HOLD

On hold until Benchmark 3G1 is completed.

June 2021

In progress creating & scheduling training for MWDBE contractors on completing bid documents. Collaborating with OneWest.

ON HOLD

Further outreach is ON HOLD pending LMHA choosing a system to better communicate with residents and participants through email and text.

Benchmark 3G3: Explore technology options for making easier connections between employers and residents. (12/31/2021)

May 2021

Not yet begun

ON HOLD

Dependent on completion of SmartSheet in Benchmark 3G1, but continue to add Section 3 Business Concerns to the HUD database. 15 so far this year.

Objective 3H: LMHA will provide strategies, policies & practices that support residents that have been or might be impacted by COVID.

Benchmark 3H1: Identify ongoing / long-term COVID-related needs among residents. (8/31/2021)

May 2021

Developing survey to administer at Dare to Care events.

June 2021

Survey developed and will be launched in July 2021.

July 2021

Survey has begun at Parkway during Dare to Care. Other sites will distribute survey through the resident councils.

August 2021

LMHA plans to utilize Internet outreach efforts at Parkway in September to get more survey responses.

Benchmark 3H2: Evaluate LMHA's ability to address those needs / Identify community partners. (9/30/2021)

May 2021

On hold until Benchmark 3H1 is completed.

Benchmark 3H3: Develop a plan to provide / refer to resources, communicate expectations re: when eviction moratoriums end. (10/31/2021)

May 2021

On hold until Benchmark 3H2 is completed.

July 2021

Letter finalized to send to public housing residents who owe rent. Letter provides resources and sets expectations. Separate letters providing resources to residents who are up-to-date in payments is also being

drafted.

August 2021

Letter referenced above mailed to residents. LMHA plans to apply directly to Louisville Metro Government on behalf of delinquent residents for rental assistance.

Strategic Goal 4: Community and Regional Engagement

LMHA will ensure that the agency is a leader in engaging key community and regional stakeholders in building and implementing a shared vision, mission, goals, and values related to affordable housing, community building and neighborhoods without barriers. A special emphasis will be placed on continuing to strengthen relations and interactions with metro government, economic development/business interests, racial equity advocates, fair housing interests, support services providers, and affordable housing/homeless assistance providers.

Action Plan Lead: Sarah Galloway

Objective 4A: LMHA will provide Board and staff leadership in community and regional engagement that furthers its goals and values that include, but are not limited to, affordable housing, resident self-sufficiency and racial equity.

Benchmark 4A1: Identify board and staff participation in community and regional boards. (6/30/2021)

May 2021

Survey went out to LMHA Board members to gather information regarding other community and professional affiliations they may have. A reminder with a deadline will be sent out in June.

June 2021

Received 7 responses to the LMHA Board survey. Benchmark goal for staff survey design and results to be moved to 7/31/21.

July 2021

Staff survey to be developed.

August 2021

Staff survey distributed on 8/18/21 to all LMHA staff. 19 responses were received.

Benchmark 4A2: Identify gaps and missing linkages. (9/30/2021)

Benchmark 4A2: Identify gaps and missing linkages. (9/30/2021)

ON HOLD

On hold until Benchmark 4A1 is completed.

Benchmark 4A3: Recruit/encourage board and staff to join boards or get involved with organizations/build pipeline. (On-going beginning 10/1/2021)

ON HOLD

On hold until Benchmarks 4A1 and 4A2 are completed.

Objective 4B: LMHA will expand its engagement with economic development, job training, and major employer partners to further resident employment, Section 3, and MBE / WBE opportunities.

Benchmark 4B1: Identify community resources that LMHA partners with to assist with capacity building. (7/31/2021)

June 2021

Have identified 8 agencies that LMHA currently partners with - OneWest, LCCC, WEOP, Equity in Procurement Task Force, YouthBuild, GLI / Metro Chamber, Kentuckiana Works, AMPED

July 2021

The identification of community resources is ongoing.

August 2021

Ongoing

Benchmark 4B2: Inventory of resources that can assist in filling gaps for Section 3 and MWBDE participation. (7/31/2021)

June 2021

Have identified 1 agency - KentuckianaWorks - currently not in contact with them

July 2021

We are now an MOU partner with KentuckianaWorks.

August 2021

Exploring use of Salesforce CRM database for use by LMHA and community partners to recruit and communicate with Section 3 and MWDBE firms, track outcomes

Benchmark 4B3: Develop relationships to fill the gaps. (On-going beginning 8/1/2021)

June 2021

Have developed a list of how LMHA is currently interacting with the following: OneWest, LCCC, Equity in Procurement, WEOP, YouthBuild, and AMPED. This work is ongoing.

July 2021

Relationship development is ongoing.

Objective 4C: LMHA will advocate for public and private investments and job opportunities in West Louisville and in other neighborhoods where the agency has invested in affordable housing and building quality communities.

Benchmark 4C1: Assist the Board's Economic Opportunity Committee with membership growth, staffing, scheduling and mission implementation. (On-going)

May 2021

In-process - Committee has not met

June 2021

Working with Board members to schedule first meeting

July 2021

Working with Board members to schedule first meeting

ON HOLD

ON HOLD until committee meeting is scheduled.

Benchmark 4C2: Utilize the Board's Economic Opportunity Committee to direct advocacy initiatives. (On-going)

ON HOLD

On hold until Benchmark 4C1 begins

Benchmark 4C3: Seek out new community engagement opportunities to impact on economic investment in West Louisville. (12/31/2021 initial report)

May 2021

Ongoing

June 2021

Ongoing

July 2021

Ongoing

August 2021

Ongoing

Objective 4D: LMHA will provide strong leadership and expertise in the local planning initiatives that impact on affordable housing, community development, homelessness, fair housing, and racial equity.

Benchmark 4D1: Identify key planning initiative where LMHA is involved and identify and prioritize gaps. (6/30/2021)

May 2021

Information is being gathered regarding LMHA's involvement in key community planning initiatives, and compiled into a spreadsheet. Includes the Initiative, Geographic Impact, Lead LMHA representative, description, and website.

June 2021

Inventory has been created of gaps and opportunities. BENCHMARK COMPLETED

Benchmark 4D2: Identify board/staff to fill gaps. (9/30/2021)

ON HOLD

On hold until Benchmark 4D1 is complete

August 2021

Developing strategy to identify staff and Board members.

Benchmark 4D3: Develop plan to promote activities externally and report out on internally.
(12/31/2021)

ON HOLD

ON HOLD until Benchmark 4D2 is complete.

Strategic Goal 5: Marketing and Image-Building

LMHA will expand the marketing, promotion and communication of its image, mission, and products to the general public, its business partners and its housing clients. The agency will bring clarity and transparency in proactively defining the many public values that are furthered by providing affordable housing in the Louisville – Jefferson County Metro Area. LMHA will be recognized as a strong leader and advocate in the community and region for affordable housing and community building.

Action Plan Lead: Courtney Lewis

Objective 5A: LMHA will prioritize Board and staff engagement in improving external marketing and communications through website improvements, brochures, speaking engagements and a social media presence.

Benchmark 5A1: Develop an external communications plan. (6/4/2021)

June 2021

First draft of plan submitted to task group/ executive director.

July 2021

Edits in progress

ON HOLD

ON HOLD until Public Information Coordinator position is filled.

Benchmark 5A2: Begin building brand and messaging. (10/15/2021)

ON HOLD

On hold for 5A1

Benchmark 5A3: Implement the new plan (updated website, brochures, speaking engagements and social media). (1/1/2022)

ON HOLD

On hold for 5A2

Objective 5B: LMHA will expand the public values that benefit from public housing to also include values such as fair housing, racial equity, welfare to work, economic development, community building and resident empowerment.

Benchmark 5B1: Define values listed above. (6/15/2021)

June 2021

Meeting scheduled for 6/29

July 2021

BENCHMARK COMPLETED

Benchmark 5B2: Use focus group(s) to identify values the LMHA adds to the community and include results in 5A. (7/15/2021)

June 2021

Questions for focus groups/ survey established. Will work with new team member to select groups and excute focus groups/ survey.

ON HOLD

On hold for new team member

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Objective 5C: LMHA will prepare a presentation that profiles the strategic plan, the agency's social and community impact and resident testimonials for the Board and key staff to present to community groups.

Benchmark 5C1: Determine best form(s) for the presentaion and target audiences. (7/15/2021)

June 2021

Video determined to be the best form of presentation.

July 2021

BENCHMARK COMPLETED

Benchmark 5C2: Develop and utilize presentation(s). (1/1/2022)

ON HOLD

On hold until completion of 5C1

Objective 5D: LMHA will improve its internal communication channels through breaking down bureaucratic silos, engaging in more teambuilding across business units, and providing for full transparency.

Benchmark 5D1: Researching and identifying options for better internal communications. (7/15/2021)

June 2021

Meeting with Edward to select best internal communication platform

July 2021

BENCHMARK COMPLETED

Benchmark 5D2: Implement improved internal communications systems. (11/15/2021)

ON HOLD

On hold until completion of 5D1

Benchmark 5D3: Emphasize the LMHA vision/mission, strategic goals and values to all employees through new communications. (Beginning 1/1/2022)

ON HOLD

On hold until completion of 5D2

Objective 5E: LMHA will expand its outreach and communication with populations underserved by the agency because of language, cultural or other barriers.

Benchmark 5E1: Identify underserved populations. (5/20/2021)

June 2021

Completed. Reviewed Census data and Language Line data. Had a meeting with the Office of Globalization. Identified populations that are English as Second Language.

July 2021

BENCHMARK COMPLETED

Benchmark 5E2: Develop language access plan. (6/1/2021)

June 2021 Completed. Language Access Plan written and included in ACOP and Admin Plan to be updated within the next two weeks. (See attached).

July 2021 No update

ON HOLD ON HOLD until Public Information Coordinator position is filled.

Benchmark 5E3: Engage local agencies to identify other barriers and solutions to improve outreach. (10/15/2021)

June 2021 No update

July 2021 No update

ON HOLD ON HOLD until Public Information Coordinator position is filled.

Strategic Goal 6: Technology/Software Systems Upgrades and Utilization

LMHA will provide for new and/or upgraded information technology systems and software for all departments. All employees will be trained on the upgraded technology and software systems and will be expected to fully utilize such systems in improving agency productivity, networking interaction with customers, and reducing the dependency on paper documents. All systems should be highly integrated to the extent possible. High standards will be set for data security, data integrity and data redundancy.

Action Plan Lead: Cheryl Butler

Objective 6A: LMHA will evaluate and upgrade the entire information technology and software systems and provide for the additional staffing capacity to provide for implementation, technical assistance and ongoing evaluation.

Benchmark 6A1: Sign contract with vendor. (4/15/2021)

May 2021

Contact has been signed. BENCHMARK COMPLETED

Benchmark 6A2: Testing & implementation of new software system (Phase I & Phase II). (6/30/2022)

May 2021

Phase I set up has begun

June 2021

Business plan research meetings conducted during June, to establish system settings for Public Housing, Waiting Lists, FSS, and Financials

July 2021

Phase I set up began.

August 2021

Phase I set up and pilot conversion testing is complete. Final conversion scheduled for November.

Benchmark 6A3: Train staff. (6/30/2022)

ON HOLD

Training will begin after setup is complete

August 2021

Phase I PILOT training was completed with all departments on August 27. Phase I End User training scheduled for September 30 through October 18.

Objective 6B: LMHA will ensure that the systems will be fully integrated to the extent possible and that the systems will address the issues of data security, data integrity, and redundancy.

Benchmark 6B1: Review security, integrity and redundancy of new software system. (4/30/2021)

May 2021

Data security has been reviewed and approved by Mountjoy Chilton Medley. Letter to commissioners should be delivered soon.

ON HOLD

ON HOLD until letter is received.

Benchmark 6B2: Review need for subsequent periodic study and reporting of new software

system. (6/30/2021)

ON HOLD

Dependent on completion of 6B1

Objective 6C: LMHA will provide for Scorecard / Dashboard instruments to address the financial implications and data mining considerations.

Benchmark 6C1: Survey board and management on data metrics for scorecards/dashboards. (6/30/2022)

ON HOLD

Dependent on being further along with implementation

Objective 6D: LMHA will utilize the new technology and software to better compare, contrast and collaborate with other Moving to Work agencies and HUD MTW evaluators.

Benchmark 6D1: Collaborate with other MTW agencies who use YARDI and evaluators explore potential benefits. (4/30/2022)

ON HOLD

Dependent on being further along with implementation

Objective 6E: LMHA will provide for training and learning applications for all employees to ensure that all technology and software systems are fully utilized and implemented.

Benchmark 6E1: Utilize manager/supervisor and employee satisfaction surveys for baselines of skills needed. (10/31/2021)

ON HOLD

Dependent on completion and analysis of above referenced surveys

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Benchmark 6E2: Select and provide staff training. (1/15/2022)

ON HOLD

Dependent on completion of 6E1

Objective 6F: LMHA will utilize technology to enhance the agency's interactions with customers.

Benchmark 6F1: Collect email addresses at all certifications and update phone number. (6/1/2021)

May 2021

ON GOING

June 2021

ON GOING

ON GOING

These efforts will remain ON GOING and will not be reported upon until new communicaitons systems are in place.

Strategic Goal 7: Customer Satisfaction/Customer Service

LMHA will set high standards for excellence in resident satisfaction and quality of life that will be measured through a biennial Customer Satisfaction Survey process. Satisfaction is being evaluated for factors that include customer service, maintenance quality, safety/security, residence quality, social interaction, and support services. Satisfaction ratings and trending are analyzed and factored into decisions regarding portfolio investments, community partnerships/interaction, support services linkages, as well as employee evaluations and staffing needs.

Action Plan Lead: Pam Bischoff

Objective 7A: LMHA will utilize the results from the Customer Satisfaction Survey as key considerations in portfolio investments, community building, resident quality of life, and employee evaluations.

Benchmark 7A1: Share survey and results with a large cross-section of staff. (6/30/2021)

May 2021

Draft of public housing customer satisfaction survey results completed. Housing Choice Voucher version is to be completed in June 2021.

June 2021

6/22/2021: Dan distributed the customer satisfaction survey for HCV and PH to all staff. COMPLETED

Benchmark 7A2: Conduct departmental focus groups to review and create plan. (8/15/2021)

ON HOLD

Dependent on completion of 7A1

July 2021

List developed of 6 departments / customer service areas for conducting focus groups. Planning for scheduling / conducting focus groups is underway.

August 2021

Planning is ongoing. Benchmark needs revision "to review and create plan to measure customer satisfaction and incorporate into departmental employee performance evaluations".

Benchmark 7A3: Identify how each department & employee can contribute to customer satisfaction & employee performance evaluations. (12/31/2021)

ON HOLD

Dependent on completion of 7A2

Objective 7B: LMHA will share the CSS results with key stakeholder groups such as landlords, business partners and support services providers as well as resident boards / councils.

Benchmark 7B1: Provide survey and results to HCV landlords and Lou Apartment Association. (7/31/2021)

ON HOLD

On hold until HCV version is ready. Projected June 2021.

June 2021

6/23/2021: Survey results distributed to HCV staff for review.

July 2021

Determining best way to distribute surveys to landlords. Most likely will be a combination of email and mail.

August 2021

Working to distribute survey results to landlords by email and mail.

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Benchmark 7B2: Provide survey and results to business partners & service providers (Special Referrals). (7/31/2021)

ON HOLD

On hold until both PH & HCV versions completed.

June 2021

6/23/2021: PH & HCV surveys sent to key staff for distribution.

July 2021

Survey results emailed to Special Referral partners. COMPLETED

Benchmark 7B3: Provide survey and results to resident councils and seek feedback. (9/30/2021)

ON HOLD

PH Survey results will be distributed to resident councils in July 2021

June 2021

6/23/2021: PH survey forward to key staff to share with resident councils and solicit feedback.

July 2021

Survey results have been shared with six of seven resident councils.

August 2021

Several recommendations: better cleaning and lighting, new security company, lease enforcement, replacing all plumbing, and replacing all carpet with tile.

Objective 7C: LMHA will encourage CSS high performing Asset Management Projects (AMPs) on satisfaction factors to provide training to other AMPs that are low performers in customer ratings.

Benchmark 7C1: Identify high & low performing AMPs by each satisfaction factor. (7/31/2021)

May 2021

PH Survey results to be distributed in June 2021

June 2021

6/23/2021: PH Survey results distributed to PH directors to identify high and low performers.

July 2021

Survey results analyzed by housing site and grouped into the following categories: Yellow - national average; Red - below average; Green - meeting or exceeding average. BENCHMARK COMPLETE

Benchmark 7C2: High performing AMPs develop training for low performing AMPs. (9/30/2021)

ON HOLD

Dependent on completion of 7C1

August 2021

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Benchmark 7C3: Train low performing AMPs. (3/30/2022)

ON HOLD

Dependent on completion of 7C2

Objective 7D: LMHA will expect that all supervisors will share the CSS results with their employees and that all employees will have some customer satisfaction performance standards and reward opportunities.

Benchmark 7D1: Directors & supervisors will share CSS with all employees and solicit feedback. (9/30/2021)

May 2021

PH & HCV survey results to be distributed to Directors in June 2021 and supervisors no later than July 2021

June 2021

6/23/2021: Full PH & HCV survey results distributed to senior staff. Heath to contact directors regarding soliciting feedback through supervisors.

ON HOLD

ON HOLD until Benchmark 7A2 is completed.

Benchmark 7D2: Identify how each department & employee can contribute to customer satisfaction & employee performance evaluations. (12/31/2021)

ON HOLD

Dependent on completion of 7D1

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Benchmark 7D3: Updated position descriptions and performance evaluations to reflect customer satisfaction emphasis. (6/30/2022)

ON HOLD

Dependent on completion of 7D2

Objective 7E: LMHA will update the CSS in two years to determine the customer satisfaction trends and indicators that can be compared and contrasted with the 2020 survey.

FY 2021

Please note that this Objective will not have any Action Plan steps until FY 2022

Strategic Goal 8: Board Leadership Development

LMHA will be governed by a Board of Commissioners that is fully prepared to meet its critical roles and responsibilities as strategic leaders and advocates in achieving the vision, mission, strategic goals, and values of the agency. Strategic planning will provide one of the key leadership tools that can be utilized to collaboratively focus with the staff leadership team on strategic thinking-based decision-making, policy-setting, performance metrics setting, resident communications and community engagement. Training and professional development opportunities and leadership tools will be provided to advance these leadership roles. Strategies and tools for Board succession planning will be formulated.

Action Plan Lead: Lance Gilbert

Objective 8A: LMHA Board will define and implement its Board leadership roles and responsibilities including, but not limited to, strategic planning, policy-setting and strategic thinking.

Benchmark 8A1: Evaluating Commissioner's skill sets and then identify any gaps. (April each year)

May 2021

In process. To be completed by April 2022

ON HOLD

In process. Needs to be initiated by an appointed Chair of the Governance Committee. Committee Chair and members still need to be identified. ON HOLD

Benchmark 8A2: Define Board and Committee roles & responsibilities to include policies. (12/31/2021)

May 2021

In process. To be completed by December 2021

ON HOLD

For the most part, these will be defined with Charters following approval of the By Laws by the County Attorney. See Objective 8C. ON HOLD

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Benchmark 8A3: Utilize Skills/Needs Assessment for the purpose of committee assignments and recruitment of new committee members and commissioners. (On-going beginning 10/1/2021)

ON HOLD

Need to appoint a lead person to take action on this. Will start in October and will be an on-going assessment.

Objective 8B: LMHA Board will define and implement its Board leadership roles in partnering with the Executive Director on the marketing, advocacy and community engagement goals and objectives outlined in the Strategic Plan.

Benchmark 8B1: Define opportunities for Board support of the ED in meeting marketing, advocacy and community engagement goals. (7/31/2021)

May 2021

Discussions with ED will begin on this topic before end of June 2021

June 2021

Need to organize a meeting with ED week of July 12th

ON HOLD

Further action on this benchmark is dependent on the Community & Regional Engagement Committee (see tab 4) and the Marketing & Image Building Committee (see tab 5).

Benchmark 8B2: Match Commissioners' skills and community connections to above opportunities. (9/30/2021)

ON HOLD

Process will start in August 2021

Benchmark 8B3: Formalize list of skills and connections (directory) for ED. (9/30/2021)

ON HOLD

Dependent on 8B1

Objective 8C: LMHA Board will consider the options of creating a Board Governance Committee and a Board Strategic Planning Committee and evaluate the current structure of other committees.

Benchmark 8C1: Evaluate current committee structure and determine what committees are needed. (9/30/2021)

May 2021

Already being proposed through new By Laws that are currently being drafted. Anticipate finalization before 9/30/2021

ON HOLD

Committee structure has been included in latest draft of the By Laws. Will be finalized before Sept. 2021 ON HOLD

Benchmark 8C2: Select Commissioners to Write Committee Charters. (9/30/2021)

ON HOLD

This process will follow immediately after completion of 8C1

ON HOLD

ON HOLD, waiting on By Law approval from County Attorney and make charters official immediately after

Benchmark 8C3: Write the charter of each committee. (11/30/2021)

ON HOLD

This process will follow after completion of 8C2

Benchmark 8C4: Approval of revised committee structure, charters & committee chairs. (1/31/2022)

ON HOLD

Process to start after completion of 8C3

Objective 8D: LMHA Board will provide for and implement a performance evaluation instrument and process for evaluating both the Executive Director and the Board of Commissioners.

Benchmark 8D1: Determine process and timing for performance evaluation (ED & Board). (6/30/2021)

May 2021

Process has not started. This needs to be worked on in June, 2021 in conjunction with the Personnel Committee

June 2021

Governance and Personnel Committee need to meet to discuss next steps

July 2021

Governance (to be established) and Personnel Committees along with Lisa will review evaluation templates from consultant.

August 2021

Personnel Committee members are working on the evaluations.

Benchmark 8D2: Create evaluation tools and introduce to Board. (12/31/2021)

May 2021

Personnel Committee held initial meeting to begin work on evaluation tools.

ON HOLD

Dependent on completion of 8D1.

Benchmark 8D3: Conducting evaluations. (5/31/2022)

ON HOLD

On hold until Benchmark 8D2 is completed.

Objective 8E: LMHA Board will collaborate with the Executive Director on defining a select group of performance metrics (8 to 10) that will be reported out on quarterly.

Benchmark 8E1: Obtain 12 - 15 metrics from ED. (10/31/2021)

May 2021

Need to get input from ED during the month of June 2021

June 2021

Need input from ED during week of July 12th

July 2021

Metrics should be indicative of the health of the organization including: 1. Internal Controls, 2. Staff, 3. Compliance, 4. Finances and 5. Audits

ON HOLD

ON HOLD, the metric will follow developing a new monthly Board report, See 8G3 below.

Benchmark 8E2: Commissioners review and rank, selecting 8 to 10. (11/30/2021)

ON HOLD

Dependent on completion of 8E1

Benchmark 8E3: Develop Report. (11/30/2021)

ON HOLD

Dependent on completion of 8E2

Objective 8F: LMHA Board will schedule a Board Leadership Training event to build the leadership capacity and toolkit.

Benchmark 8F1: Define leadership training needs. (8/31/2021)

May 2021	Strategic Planning committee and possible governance committee to collaborate with ED on this benchmark before July 31, 2021
June 2021	Meeting needs to be organized for July 2021
July 2021	Strategic Planning Committee to organize a date to start process. Develop skills matrix of each commissioner and identify gaps. Consider housing industry groups and the Center for Non Profit Excellence as possible trainers.
ON HOLD	ON HOLD until survey in 8F2 is completed.

Benchmark 8F2: Survey Commissioners. (8/31/2021)

ON HOLD	Dependent on completion of 8F1
July 2021	Dan will prepare draft of survey and circulate it with the Strategic Planning committee.

August 2021

Draft survey prepared and circulated. Comments received, survey updated and recirculated.

Benchmark 8F3: Develop & possibly advertise scope of work. (10/31/2021)

ON HOLD

Dependent on completion of 8F2

Benchmark 8F4: Select trainer. (11/30/2021)

ON HOLD

Dependent on completion of 8F3

Benchmark 8F5: Conduct training. (6/30/2022)

ON HOLD

Dependent on completion of 8F4

Objective 8G: LMHA Board will identify opportunities to engage with the staff to show appreciation for their work and to network with the staff to better learn about agency operations.

Benchmark 8G1: Identify and schedule events interacting with staff. (8/31/2021)

May 2021

Work with Board Chair and ED to establish a calendar of events

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June 2021

Currently in discussions for some events to take place this year

July 2021

Lisa and Manfred to take the lead on this.

August 2021

Preliminary discussions begun.

Benchmark 8G2: Conduct events scheduled above. (6/30/2022)

ON HOLD

Dependent on completion of 8G1

Benchmark 8G3: Identify monthly staff reports to Commissioners. (On-going beginning 7/1/2021)

May 2021

ED to recommend reports to Commissioners by 7/31/2021

June 2021

ED to recommend reports to Commissioners by 8/31/2021

July 2021

Lisa to work with her direct reports to establish a monthly report package that encompasses the metrics mentioned above.

August 2021

Initial meeting held to discuss new monthly report. Each participant is to prepare a draft for their area of the report as well as offer suggestions for making the report easier to read (more graphic).

Objective 8H: LMHA Board will collaborate with the Executive Director on updating the Bylaws to better define Board roles, governance responsibilities, and ethical expectations.

Benchmark 8H1: First Draft of By Laws Created. (4/15/2021)

May 2021

Done and reviewed by Strategic Planning Committee BENCHMARK COMPLETED

Benchmark 8H2: Review Full Draft and Obtain Feedback from Strategic Planning Committee. (5/28/2021)

May 2021

BENCHMARK COMPLETED

Benchmark 8H3: Create Second Draft incorporating All Comments. (6/15/2021)

May 2021

In process of being completed before June 15

June 2021

Completed. Final DRAFT at County Attorney for approval

Benchmark 8H4: Strategic Planning Committee Reviews Second Draft to Ensure All Comments Are addressed. (6/30/2021)

May 2021

This will be expanded to include all Commissioners

June 2021

Completed early June

Benchmark 8H5: Obtain Review of Final Version with City Attorney and Others in Metro Government Required to Sign Off. (7/31/2021)

ON HOLD

Dependent on 8H4

June 2021

Bylaws forwarded to County Attorney for comments.

July 2021

No comments received during July.

ON HOLD

ON HOLD until comments received from County Attorney.

Benchmark 8H6: If Changes Suggested by County Attorney or Other Metro Government Resources, discuss with them or just accept changes. (8/31/2021)

ON HOLD

Dependent on 8H5

Benchmark 8H7: Review with Board of Commissioners and Approve at Board Meeting. ((9/21/2021)

ON HOLD

Dependent on 8H6