

## 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. (12/31/2023)

**Benchmark 1A1:** Complete a comprehensive physical needs assessment of 100% of the LMHA portfolio of properties. (2/28/2023)

**June 2022**

After a delay, inspections continue and are projected to be completed on July 1st.

**July 2022**

Site inspections have been completed and reports are being drafted by the contractor.

**August 2022**

Staff are reviewing the draft reports and providing feedback to the contractor.

**Benchmark 1A2:** Utilize the needs assessment to prioritize assets to schedule upgrades and modernization or repositioning in 2022 and 2023. (6/30/2023)

**ON HOLD**

On hold until the PNAs and/or CNAs are received. Resume April 2023.

**Benchmark 1A3:** Prepare the budget workups and budgeting timelines / strategies for implementation in 2023 and 2024. (10/31/2023)

**ON HOLD**

On hold until the PNAs or CNAs are prepared. Resume August 2023.

**Objective 1B:** LMHA will formulate redevelopment plans and implementation strategies for properties that are deemed to be in a state of functional obsolescence. (2/28/2024)

**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. (1/31/2024)

**ON HOLD**

Determination of functional obsolescence will be made when the PNAs and/or CNA's are received. Resume November 2023.

**Benchmark 1B2:** Begin preparation of the budget workups and budgeting timelines / strategies for implementation strategies for select properties that are deemed to be in a state of functional obsolescence. 4/30/2024

**ON HOLD**

Budgets and timelines will be prepared upon determination of functional obsolescence. LMHA's receipt of RAD Physical Conditions Assessments has been delayed. Resume October 2023.

**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:** Lease up additional emergency housing assistance vouchers related to COVID-19. (12/31/2022)

**ON HOLD**

As of 5/1/2022 LMHA has received 161 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 housing options for those experiencing homelessness. (On Going)

**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. (On Going)

**ON GOING**

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 substantial the same commitments. The 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. (1/31/2024)

**Benchmark 1E1:** For select functionally obsolete properties, examine the benefits of place based strategies versus deconcentration. (1/31/2024)

**July 2022**

On Hold until specific properties are identified as obsolete. As plans are

made for obsolete properties, consideration will be given to place based and deconcentration strategies, weighing the benefits, opportunities, and feasibility of each.

**Objective 1F:** LMHA will deconcentrate low-income housing and further housing choice through mixed-income developments that are situated throughout all Louisville Metro neighborhoods.

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

**July 2022**

ON GOING Support for all off-site awardees continues.

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

**Benchmark 1G1:** Define and determine best measurement practices for racial equity and fair housing. (11/30/2022)

**June 2022**

LMHA tool will be modeled after Seattle's.

**July 2022**

No updates to report.

**August 2022**

No updates to report.

**Benchmark 1G2:** Ensure all substantial rehab, new construction and comprehensive modernization plans contain broadband connectivity standard. (On Going)

**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 appropriate green building and sustainability practices to the greatest extent possible. (On Going)

**July 2022**

Pursuing an opportunity for development at Iroquois. The predevelopment plans include green building components.

**August 2022**

[Staff are waiting for a response for the previously submitted Iroquois application and plans.](#)

**Objective 1H:** LMHA will engage community stakeholders in the planning and investment in select 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. (On-Going)

**ON HOLD**

On hold until specific properties are identified as obsolete. If plans for Iroquois move forward, an engagement plan will be initiated.

## 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. (9/30/2022)

**June 2022**

Handbook with ED for review.

**July 2022**

Handbook with ED for review

**August 2022**

Received handbook from ED. Working on edits.

**Benchmark 2A2:** Present human resources policies and practices to Board of Commissioners and Management Team. (10/31/2022)

**ON HOLD**

Pending completion of Benchmark 2A1

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**Benchmark 2A3:** Implement and distribute new human resources policies and practices and train staff. (12/1/2022)

**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:** Select consultant to assist in identifying LMHA's tradition practices and culture for review and potential change. (9/30/2022)

**July 2022**

Nothing to report this month. Personnel has dealt with an increase of positive covid related cases and an increase of employee work related violations. Expect to meet with HR committee during August to identify consultant.

**August 2022**

Nothing to report.

**Benchmark 2B2:** Identify good and bad parts of LMHA's culture (traditional practices & customs). (12/31/2022)

**OH HOLD**

ON HOLD until Benchmark 2B1 is completed.

**Benchmark 2B3:** Identify and prioritize areas for improvement and create adaptation model. (3/31/2023)

**ON HOLD**

ON HOLD until Benchmark 2B2 is completed.

**Benchmark 2B4:** Begin long term implementation of cultural adaptation. (On-going beginning 4/1/2023)

**ON HOLD**

ON HOLD until Benchmark 2B3 is completed.

**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 maintain high performing agency status.

**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.

**NO ACTION  
NEEDED**

Review Biennially starting in Fall 2023. No reporting required until next fiscal year.

**Objective 2D:** LMHA will continue to 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. (On-Going)

**ON GOING**

This effort is on-going and there will be no reporting unless changes are made to these efforts.

**Objective 2E:** LMHA will evaluate all departments for compensation fairness and provide for action plans to address any disparities.



**Benchmark 2E1:** Determine scope of work for compensation survey and prepare RFP.  
(9/15/2022)

**July 2022**

Nothing to report. Expect to meet with HR committee during the month of August to determine scope of work.

**August 2022**

Scope of work to be determined.

**Benchmark 2E2:** Select consultant for compensation survey and submit to board.  
(10/31/2022)

**ON HOLD**

ON HOLD until Benchmark 2E1 is completed.

**Benchmark 2E3:** Complete compensation survey. (10/31/2022)

**ON HOLD**

ON HOLD until Benchmark 2E2 is completed.

**Benchmark 2E4:** Plan for implementing findings in report (no action until 2023-2024 fiscal year)

**NO ACTION  
NEEDED**

Reporting will begin in Fall 2023.

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

**Benchmark 2F1:** Work with department heads to identify needed training for staff. (On-Going)

**May 2022**

In progress of identifying training resources, specifically customer service training. Will work with appropriate Department heads regarding the training.

**July 2022**

On going.

**August 2022**

on-going

**Benchmark 2F2:** Train staff. (On-going beginning 9/12/2022)

**July 2022**

Nothing to report.

**August 2022**

Nothing to report

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

**Benchmark 2G1:** Revise survey document with team and select consultant. (9/30/2022)

**July 2022**

Nothing to report

**August 2022**

Reviewed previous survey document to determine necessary revisions.

**Benchmark 2G2:** Send survey to employees. (10/31/2022)

**ON HOLD**

ON HOLD until Benchmark 2G1 is completed.

**Benchmark 2G3:** Analyze Survey Results. (11/15/2021)

**ON HOLD**

ON HOLD until Benchmark 2G2 is completed.

### 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 from Yardi that will be utilized to determine "success rate" of working families transitioning out of assisted housing. (12/31/2022)

**July 2022**

Revisited previously selected success measure in preparation for matching up to reports or outputs possible from Yardi system.

**August 2022**

No updates to report.

**Benchmark 3A2:** Establish Baseline measurements based on metrics, evaluate annually thereafter. (3/31/2023)

**ON HOLD**

On hold until Benchmark 3A1 is completed.

**Benchmark 3A3:** Set goals that will be measured annually against baseline metrics.  
(3/31/2023)

**ON HOLD**

On hold until Benchmark 3A1 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:** Develop improved communication methods for reaching residents regarding employment and training opportunities. (12/31/2022)

**July 2022**

No updates to report.

**August 2022**

Residents received three notifications about employment and training opportunities in the last month. P.I.O to meet Special Programs Director in the next month to discuss setting a consistent calendar of notifications.

**Benchmark 3B2:** Explore Incentives for resident participation in workforce training / maintaining employment / reaching benchmarks. (11/30/2022)

**July 2022**

No updates to report.

**August 2022**

No updates to report.

**Objective 3C:** LMHA will improve the staff capacities and resource materials to be able to advise residents on support services available in the community. (Reviewed Annually)

**Benchmark 3C1:** Continue LMHA staff access to Unite Us and LouieConnect, train staff on use. (Review Annually by September 30)

**July 2022**

No updates to report.

**August 2022**

Working on scheduling another LouieConnect training for interested and new LMHA team members.

**Benchmark 3C2:** Work with resident councils to evaluate resident communication methods and develop strategies to improve. (9/30/2022)

**July 2022**

No updates to report.

**August 2022**

Communications plans for the current Resident Councils have been updated for the year. BENCHMARK COMPLETED, but will be reopened as new Resident Councils are added.

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

**Benchmark 3D1:** Review digital skills plans (Remote & In-person Options). (Annually by August 31)

**July 2022**

Parkway Place residents, especially new move-ins, continue to sign up

for free broadband. Other residents and HCV participants may be eligible for the Affordable Connectivity Program.

**August 2022**

[No updates to report.](#)

**Benchmark 3D2:** Connect resident to and offer Digital Skills classes. (On-Going)

**July 2022**

In-person trainings are still ON-HOLD and residents are connected to virtual training options.

**August 2022**

[No updates to report.](#)

**Benchmark 3D3:** Utilize communication strategies developed in 3B and 3C to rollout information to residents re: broadband assistance. (12/31/2022)

**July 2022**

Special Programs team was trained on assisting residents obtain broadband services through the Affordable Connectivity Program. Several internet providers offer plans resulting in very low or no cost to subscribers.

**August 2022**

[No updates to report.](#)

**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:** Re-evaluate space in high rises for service providers to visit and work with residents on-site (group and confidential spaces) - include Zoom. (7/31/2022)

**July 2022**

Space available for immediate use has been identified at the Wiggins Center and St Catherine Court. Other sites may require some minor construction. Remote assistance at sites will require provision of wi-fi which should be in place in early 2023.

**August 2022**

No updates to report.

**Benchmark 3E2:** Outreach to residents to define needed / desired services. (Review annually beginning June 2023)

**ON HOLD**

ON HOLD until spring 2023.

**Benchmark 3E3:** Outreach to service providers to determine interest in participation. (9/30/2022)

**July 2022**

Legal Aid Society will pilot office hours at Wiggins Center this fall.

**August 2022**

Continued discussions with Legal Aid Society. First office hours should be in September or October.

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



**Benchmark 3F1:** Review available financial skills programs (in-person & on-line). (Annually by August 31)

**July 2022**

No updates to report.

**August 2022**

Special Programs team has updated the listing of available financial skills programs in Louisville. BENCHMARK COMPLETED.

**Benchmark 3F2:** Review & Update HCV Homeownership marketing plan (external & internal). (Annually by September 30)

**July 2022**

HCV HO team has provided LMHA Public Information Coordinator with previous marketing plan information. Update is still on target.

**August 2022**

LMHA Public Info Coordinator developed draft plan, now in review by HCV HO team. Link added to website with Welcome Packet materials. HCV HO orientation materials updated.

**Benchmark 3F3:** Develop distribution and referral processes. (12/31/2022)

**June 2022**

Met with Russell A Place of Promise to coordinate offering Home Preservation (HPP) to those in their home repair program. New brochures to be mailed in July with HPP Zoom Orientations scheduled

**July 2022**

Home Preservation materials provided to Russell A Place of Promise and mailed to 200 families in the Russell neighborhood.

**August 2022**

Home Preservation Program (HPP) materials mailed to 211 more Russell families and 100 Smoketown families. Two HPP orientations. Two referrals to Louisville Metro for home repairs and 18 applications mailed to interested homeowners.

**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. (8/31/2022)

**June 2022**

Utilizing contacts from Contractors Luncheon, added 15 MWDBE and Section 3 vendors to the Housing Authority Marketplace, which connects them to LMHA Invitations for Bids, Requests for Proposals, and Requests for Qualifications.

**July 2022**

Section 3 outreach plan is developed and includes brochures, attending and hosting public events, as well as "how-to" videos for potential contractors. Plan begins Sept 2022.

**August 2022**

First set of Section 3 and MDWBE flyers are being printed. They will be prepared in time for several community focused events in mid September

**Benchmark 3G2:** Implement the outreach plan. (9/15/2022)

**ON HOLD**

ON HOLD until September 2022.

**Benchmark 3G3:** Explore technology options for making easier connections between employers and residents. (3/31/2023)

**ON HOLD**

ON HOLD until Benchmark 3G2 is implemented.

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

**Benchmark 3H1:** Update ongoing / long-term COVID-related needs among residents. (9/30/2022)

**July 2022**

No updates to report.

**August 2022**

No updates to report.

**Benchmark 3H2:** Re-Evaluate LMHA's ability to address those needs / Identify community partners. (10/31/2022)

**ON HOLD**

ON HOLD until Benchmark 3H1 is completed.

**Benchmark 3H3:** Continue to communicate expectations and connect residents with resources to prevent evictions. (On-Going)

**July 2022**

LMHA continues to connect residents to resources to cover arrears. When appropriate, LMHA applies for the assistance directly.

**August 2022**

LMHA continues to apply for assistance for public housing residents and has received substantial payments on their behalf.

## 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:** Continue to identify gaps and missing linkages. (10/31/2022)

**NO ACTION  
NEEDED**

Board and staff will be re-surveyed next fiscal year.

**Benchmark 4A2:** Identify & promote opportunities to volunteer/join boards including time allowed. (Begin 11/15/2022)

**ON HOLD**

ON HOLD until November 2022.

**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:** Continue to identify community resources for LMHA to partner with to assist with capacity building. (On-Going)

**July 2022**

Partnered with Louisville Metro Government on 18th Street streetscape

project, which provided a wide distribution of the LMHA MWDBE / Section 3 database to contractors that were not familiar with the programs.

**August 2022**

Attended outreach program sponsored by The Plan Room, which was to provide connections and prequalifications for MWDBE contractors to a general contractor for a large construction project.

**Benchmark 4B2:** Develop relationships to fill the gaps. (On-Going)

**June 2022**

Utilizing contacts from Contractors Luncheon, added 15 MWDBE and Section 3 vendors to the Housing Authority Marketplace, which connects them to LMHA Invitations for Bids, Requests for Proposals, and Requests for Qualifications.

**July 2022**

Established a closer relationship with Eddie Dunn, Founder and President of the Minority Contractors Association of Kentuckiana through face-to-face discussions and emails concerning upcoming projects and potential issues for MWDBE contractors.

**August 2022**

LMHA had a booth at the KPPA Reserve Trade Show, which gave more exposure to LMHA projects to all contractors in attendance.

**Objective 4C:** LMHA will advocate and leverage 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:** Continue utilizing Vision Russell to impact on social capital and economic investment in West Louisville. (On-going)

**July 2022**

There are currently 7 job postings on the Vision Russell website.

Ten contractors attended the pre-bid meeting for the Baxter Community Center renovation.

**August 2022**

There are currently 5 job postings on the Vision Russell website. Urban Strategies Project Manager position was filled by former LMHA resident and Scholarship recipient. CNI Team continued to conduct outreach regarding lifeguard positions.

**Benchmark 4C2:** Continue to work with partners on Iroquois redevelopment. (On-going)

**July 2022**

Recently distributed survey created by Metro Council members and a group of planning consultants for neighborhood residents to original Iroquois residents still residing in LMHA housing.

**August 2022**

No updates to report.

**Benchmark 4C3:** Seek out & participate in new community engagement opportunities to impact on economic investment in West Louisville & other neighborhoods. (On-Going)

**July 2022**

Louisville Metro Government is distributing LMHA MWDBE/Section 3 contractor database to increase participation on 18th St. Streetscape project.

Recent Russell investments highlighted during neighborhood tour held

**August 2022**

LMHA's MWDBE/Section 3 Coordinator continues to work with OneWest on providing information on bidding and employment opportunities at their new Plan Room on W. Broadway.

**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:** Provide strong leadership in planning Iroquois redevelopment. (On-Going)

**July 2022**

On July 8, LMHA submitted an application for Phase I Iroquois funding to the Louisville Affordable Housing Trust Fund.

**August 2022**

LMHA is currently awaiting a response from the Louisville Affordable Housing Trust Fund on its Phase I Iroquois funding application.



## 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: Jelisa Chatman

**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:** Review external communications plan. (Annually by July 31)

**COMPLETED**

2022-2023 External communications plan has been updated with a promotions timeline and goals to create video and blog promotions  
BENCHMARK COMPLETED.

**Benchmark 5A2:** Continue implementation of the new plan (updated website, brochures, speaking engagements and social media). (On-Going)

**July 2022**

LMHA's mission has been implemented in several recent speaking engagements including the Beecher Terrace grand opening and upcoming All-American cities remarks. Collaborating w/ Section 3 to create a new brochure

**August 2022**

New section 3 and MWDBE flyers created and will be shared during several September events. Complete website remodel is underway with an early 2023 completion date.

**Benchmark 5A3:** Explore new outreach techniques, specifically social media outlets. (9/15/2022)

**ON HOLD**

ON HOLD until Benchmark 5A1 is complete.

**August 2022**

New outreach techniques for the FY include instructional videos, updated brochures, and website posts. Discussions on social media outlets underway. Biggest barrier appears to be manpower. Currently collecting quotes for a social media contractor.

**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:** Identify programs & activities that benefit LMHA residents. (8/15/2022)

**COMPLETED**

Identified 15 programs that benefit LMHA residents. The plan to promote these programs is included in the 22-23 external comms plan and will begin 9/1/22. BENCHMARK COMPLETED.

**Benchmark 5B2:** Highlight programs & activities that benefit LMHA residents. (Begin 9/1/2022)

**ON HOLD**

ON HOLD until Benchmark 5B1 is completed.

**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:** Develop presentation(s). (Begin 11/1/2022)

**ON HOLD**

ON HOLD until the above Objectives are further along.

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**Benchmark 5C2:** Utilize presentation(s). (Begin 1/1/2023)

**ON HOLD**

ON HOLD until Benchmark 5C1 is completed.
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**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:** Implement improved internal communications systems. (1/15/2023)

**June 2022**

Compiling a list of internal communications systems to present to IT
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**July 2022**

Research on internal communications systems continues. Will present to IT in August.
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**August 2022**

<u>Met with IT to create a proper timeline to improve LMHA's intranet system by Jan 15, 2023. System will serve as an "employee hub" with resources, news, trainings, and personnel updates.</u>
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**Benchmark 5D2:** Emphasize the LMHA vision/mission, strategic goals and values to all employees through new communications. (Begin 2/1/2023)

**ON HOLD**

ON HOLD until Benchmark 5D1 is completed.
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**Objective 5E:** LMHA will expand its outreach and communication with populations underserved by the agency because of language, cultural or other barriers.

**Benchmark 5E1:** Update data set for language access plan. (Quarterly)

**July 2022**

Compliance officer is reviewing language access plan in 05/22 ACOP
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**August 2022**

<u>Compliance officer still reviewing language access plan.</u>
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**Benchmark 5E2:** Engage local agencies to identify other barriers and solutions to improve outreach. (2/28/2023)

**ON HOLD**

ON HOLD until next quarterly update of 5E1.
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**Benchmark 5E3:** Implement language plan to improve outreach. (3/15/2023)

**June 2022**

Plan discussed and presented to new compliance officer
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**ON HOLD**

ON HOLD until Benchmark 5E2 is completed.
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## 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: Testing & implementation of new software system (Phase II). (12/31/2022)

July 2022

Ongoing, training doesn't begin until August.

August 2022

Pilot training was conducted during August, and Go Live training is scheduled for October.

### Benchmark 6A2: Train staff. (10/15/2022)

June 2022

Ongoing task to complete this benchmark; Pilot conversion for HCV scheduled for July 2022

July 2022

Phase I, training ongoing as system knowledge improves and standard operating procedures in system are modified to align with best possible outcomes.

**August 2022**

HCV Staff training will begin in October 2022.

**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:** Engage with auditors to perform a Yardi conversion process affirmation with management letter produced. (12/31/2022)

**July 2022**

Ongoing, will be part of annual FYE 2022 audit where field work begins 8/22/22.

**August 2022**

In progress as part of the current annual audit underway.

**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. (3/31/2023)

**ON HOLD**

ON HOLD until Objective 6A is completed.

**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:** Begin collaboration with other MTW agencies who use YARDI and evaluators explore potential benefits. (6/30/2023)

**ON HOLD**

ON HOLD until Objective 6A is completed.

**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. (8/15/2022)

**July 2022**

Awaiting the responses from the surveys, due 8/15/2022.

**August 2022**

No updates to report.

**Benchmark 6E2:** Select trainer(s) and offer staff training. (12/31/2022)

**ON HOLD**

ON HOLD until Benchmark 6E1 is completed.

**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. (On-



Going)

**July 2022**

IT will implement a report and process to include the number of phone numbers and email addresses for all residents, include number of residents and number of email addresses and phone numbers.

**August 2022**

Email addresses and phone numbers are being obtained during Annual and Interim review and subsequently updated in the resident's computer record.

**Benchmark 6F2:** Utilize Yardi Rent Café to improve customer experiences with LMHA. (On-Going)

**ON HOLD**

ON HOLD until Yardi Rent Café implementation.

**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 Co-Leads: Jennifer McNeill & Terri Thornton**

**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. (9/30/2022)

**ON HOLD**

ON HOLD until September 2022.

**Benchmark 7A2:** Conduct departmental focus groups to review and create plan. (12/31/2022)

**July 2022**

Remaining focus groups postponed until fall 2022.

**Benchmark 7A3:** Identify how each department & employee can contribute to customer satisfaction & employee performance evaluations. (3/30/2023)

**ON HOLD**

ON HOLD until Benchmark 7A2 is completed.

**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. (No activity until next survey)

**ON HOLD**

ON HOLD until next survey is completed, Fall 2023.

**Benchmark 7B2:** Provide survey and results to business partners & service providers (Special Referrals). (No activity until next survey)

**ON HOLD**

ON HOLD until next survey is completed, Fall 2023.

**Benchmark 7B3:** Provide survey and results to resident councils and seek feedback. ((No activity until next survey)

**ON HOLD**

ON HOLD until next survey is completed, Fall 2023.

**Objective 7C:** LMHA will provide CSS lower performing Asset Management Projects (AMPs) additional training.

**Benchmark 7C1:** Provide additional REAC training. (TBD)

**ON HOLD**

ON HOLD until January 2023.

**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. (4/30/2023)

**ON HOLD**

ON HOLD until Benchmark 7A2 is completed.

**Benchmark 7D2:** Identify how each department & employee can contribute to customer satisfaction & employee performance evaluations. (6/30/2023)

**ON HOLD**

ON HOLD until Benchmark 7D1 is completed.

**Benchmark 7D3:** Updated position descriptions and performance evaluations to reflect customer satisfaction emphasis. (TBD)

**ON HOLD**

ON HOLD until benchmark 7D2 is completed.

**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.

**Benchmark 7E1:** Select consultant to conduct CSS for HCV and LMHA managed properties. (7/31/2023)

**ON HOLD**

ON HOLD until April 2023.



## 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: Open

**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. **Governance**

**Benchmark 8A1:** Evaluating Commissioner's skill sets and then identify any gaps. (June 15 of each year)

**ON HOLD**

ON HOLD until early 2023.

**Benchmark 8A2:** Define Board and Committee roles & responsibilities to include policies. (Review once a year with new Board)

**July 2022**

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**August 2022**

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**Benchmark 8A3:** Utilize Skills/Needs Assessment for the purpose of committee assignments

and recruitment of new committee members and commissioners. (Review once a year with new Board)

**July 2022**

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**August 2022**

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**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. **Strategic Planning**

**Benchmark 8B1:** Define opportunities for Board support of the ED in meeting marketing, advocacy and community engagement goals. (9/30/2022)

**July 2022**

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**August 2022**

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**Benchmark 8B2:** Develop Commissioners' skills and community connections to above opportunities. (12/31/2022)

**ON HOLD**

<u>ON HOLD until Benchmark 8b1 is completed.</u>
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**Benchmark 8B3:** Match Commissioners to community engagement opportunities. (On-Going)

**ON HOLD**

ON HOLD until Benchmark 8B2 is completed.

**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. **All Committee Chairs**

**Benchmark 8C1:** Commissioners to Review Committee Charters. (September 30 of each year)

**July 2022**

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**August 2022**

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**Benchmark 8C2:** Re-evaluate current committee structure and determine what committees are needed. (June 15 of each year)

**ON HOLD**

ON HOLD until early 2023.

**Benchmark 8C3:** Approval of any revised committee structure, charters & committee chairs. (As Needed)

**ON HOLD**

ON HOLD until needed.



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**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. **Personnel**

**Benchmark 8D1:** Review process, timing and evaluation tools for performance evaluation (ED & Board). (Biennial by April. Due 2024)

**NO ACTION  
NEEDED**

Begin work in Fiscal year 2024.
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**Benchmark 8D2:** Conducting evaluations. (June 30 of each year)

**ON HOLD**

ON HOLD until early 2023.
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**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. **Strategic Planning**

**Benchmark 8E1:** Obtain 12 - 15 metrics from ED. (12/31/2022)

**July 2022**

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**August 2022**

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

**ON HOLD**

ON HOLD until Benchmark 8E1 is completed.
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**Benchmark 8E3:** Develop Report. (6/30/2023)

**ON HOLD**

ON HOLD until Benchmark 8E2 is completed.
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**Objective 8F:** LMHA Board will schedule a Board Leadership Training event to build the leadership capacity and toolkit. **Governance**

**Benchmark 8F1:** Define leadership training needs. (September 30 of each year)

**July 2022**

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**August 2022**

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**Benchmark 8F2:** Survey Commissioners. (As Needed)

**July 2022**

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**August 2022**

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**Benchmark 8F3:** Select trainer. (12/31/2022)

**ON HOLD**

ON HOLD until Benchmark 8F1 is completed.
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**Benchmark 8F4:** Attend training. (6/30/2023)

**ON HOLD**

ON HOLD until Benchmark 8F3 is completed.
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**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. **Personnel**

**Benchmark 8G1:** Identify and schedule events interacting with staff. (8/31/2022)

**July 2022**

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**August 2022**

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**Benchmark 8G2:** Identify monthly staff reports to Commissioners'. (Start 8/1/2022)

**July 2022**

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**August 2022**

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**Benchmark 8G3:** Conduct events scheduled above. (6/30/2023)

**ON HOLD**

ON HOLD Benchmark 8G1 & 8G2 are completed.
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**Objective 8H:** LMHA Board will collaborate with the Executive Director on updating the Bylaws to better define Board roles, governance responsibilities, and ethical expectations.

**Governance**

**Benchmark 8H1:** Review Bylaws. (August 31 of each year)

**July 2022**

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**August 2022**

