

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)

December 2022	The RAD Physical Condition Reports and the CAN e-Tool have been reconciled. The data is being summarized in a comparative report to be shared with management.
January 2023	Reports are being reviewed by staff.
March 2023	No updates to report.
April 2023	On hold until Director of Strategic Initiatives is hired.

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.

April 2023

On hold until director of Strategic Initiatives is hired.

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.

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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)

ON HOLD

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)

November 2022

Rough first draft of tool completed. Still need to add guidance section, data resources and glossary.

April 2023

No updates to report.

May 2023

No updates to report.

June 2023

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)

March 2023

The Iroquois Senior Housing design continues to be developed.

April 2023

Meeting seeking community input held on April 25. Predevelopment work continues.

May 2023

Predevelopment work continues.

June 2023

Along with predevelopment efforts, the structure of the transaction, ownership of the new development, and the form of Housing Assistance Payment Agreement are being evaluated.

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)

February 2023

Forwarded update to ED for review/comments.

April 2023

Updated policy statement and drug testing program to incorporate ED comments/edits.

May 2023

Forwarded to ED for review.

June 2023

Nothing to report.

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

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)

March 2023

Survey closed on March 20th. Met with Strategic HR for preliminary briefing of results. Strategic HR compiling full results for presenting to HR Strategic Committee.

April 2023

Committee met with Strategic HR - survey results and recommendations were presented. Follow-up mtg to be scheduled with committee to determine next steps.

May 2023

Update pending follow-up mtg with committee. Implemented some suggestions from survey: emails introducing new employees to agency; customer service professional development training.

June 2023

Nothing to report.

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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.
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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)

December 2022

Reviewed and evaluated bid proposal. Met with HR committee team members to discuss bid proposal. Determined bid was not responsive to the RFP. Will re-release RFP.

January 2023

Revised and re-released RFP.

February 2023

Bid period extended by request of potential bidder. Received two bid proposals. Currently under review.

March 2023

Bid proposals reviewed and evaluated by HR Strategic Action Committee; and consultant selected. BENCHMARK COMPLETED

Benchmark 2E2: Select consultant for compensation survey and submit to board.

(10/31/2022)

ON HOLD

ON HOLD until Benchmark 2E1 is completed.

March 2023

Resolution prepared to go to Board in April for approval to enter into a contract with the selected consultant.

April 2023

Resolution taken to April Board Meeting. Approval given to enter into contract with selected consultant. Preliminary meeting with consultant has been scheduled. BENCHMARK COMPLETED

Benchmark 2E3: Complete compensation survey. (4/30/2022)

ON HOLD

ON HOLD until Benchmark 2E2 is completed.

May 2023

Have had 2 bi-weekly planning meetings; required information for survey forwarded to consultants. Job descriptions sent to Directors/Department Heads to update as necessary and return to Personnel by June 9.

June 2023

Job descriptions ret'd from Dept Heads; reviewed by Personnel and uploaded to consultant. Comparative organ. list reviewed by HR committee & returned to consultant.

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

NO ACTION

Reporting will begin in Fall 2023.

NEEDED

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

March 2023

Working on training sessions to be conducted by LMHA EAP staff.

April 2023

On site "Effective Communication" training presented through LMHA's employee assistance program, was held on 4/25, 4/27 and 5/2/23.

May 2023

On site "Excellence in Customer Service" training held May 16 through May 18, 2023.

June 2023

<u>Met with ED, Dir of Prop Management and Dir of Leased Housing to discuss employees' concerns voiced during training and the trainer's comments/suggestions.</u>
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Benchmark 2F2: Train staff. (On-going beginning 9/12/2022)

January 2023

Identifying sources for customer service training.
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February 2023 On-site, in person customer service training to be conducted by NAHRO during May 2023 (see above).

April 2023 On site "Effective Communication" training presented on 4/25, 4/27 and 5/2/23.

May 2023 Customer Service training completed.

June 2023 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)

December 2022 Copy of previous survey forwarded to consultant for review. Previous conversation included possible area to revise.

January 2023 Held planning meeting with HR committee and consultant.

February 2023 Planning meetings completed. LMHA employees notified of upcoming employee satisfaction survey. Survey launched March 6, 2023 (see above).

March 2023

Survey closed March 20, 2023. See comments under Benchmark 2B1.
BENCHMARK COMPLETED.

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

ON HOLD

ON HOLD until Benchmark 2G1 is completed.

February 2023

Employee satisfaction survey to be sent to employees March 6, 2023

March 2023

Online employee satisfaction survey to employees for completion from March 6 - March 20, 2023. Consultant compiling survey results to be presented to the HR Strategic Action committee. BENCHMARK COMPLETED.

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

ON HOLD

ON HOLD until Benchmark 2G2 is completed.

April 2023

See Benchmark 2B1

May 2023

Meeting held with Strategic HR to review survey results. Some suggestions from survey implemented. Further action(s) pending follow-up meeting with HR committee.

June 2023

Nothing to report.

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)

November 2022	Will resume in January 2023 now that both public housing and Housing Choice Voucher participants are in Yardi.
January 2023	Sent potential list of Success Measures to IT to see if which measures can be incorporated into new monthly Yardi reports.
May 2023	No updates to report.
June 2023	<u>No updates to report.</u>

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)

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.

September 2022

Will meet with public information officer in October to begin developing plan.

October 2022

Discussed plan to send out weekly emails related to LMHA Special Programs and to study the feasibility of disseminating employment opportunities provided by other agencies.

November 2022

ON HOLD for new Public Information Coordinator.

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

December 2022

No updates to report.

January 2023

Will revisit as part of the process of updating the MTW plan.

February 2023

Decided current every other year recertifications is a good incentive to seek employment. No new incentives will be considered this year, but will review again during next year's MTW plan update. BENCHMARK COMPLETED.

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)

ON HOLD

ON HOLD until first of 2023. Have decided not to schedule a training during Yardi HCV rollout.

February 2023

Team members with Unite Us access have been encouraged to utilize the system for all referrals with Unite Us partners.

May 2023

No updates to report.

June 2023

No updates to report.

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)

March 2023

Wi-Fi antennae have been installed. Broadband services are being connected followed by testing of systems. Parkway Tech Center has reopened for resident use.

April 2023

Broadband services still being installed. Testing will take place after all

sites are connected.

May 2023

Installation and testing of broadband services in community rooms completed.

June 2023

No updates to report.

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

August 2022

No updates to report.

ON HOLD

In-person training remains ON HOLD until wi-fi is installed at senior sites.

May 2023

Digital Inclusion team is beginning to look at potential trainings for residents.

June 2023

Training at public housing sites to begin in July.

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

March 2023	LMHA has received FCC grant in the amount of \$33,937 and has begun planning outreach events.
April 2023	Team members have signed up for access to system that verifies ACP eligibility. Training on the verification system scheduled in May. Conducted outreach to internet providers to gauge interest in attending future events.
May 2023	LMHA Team has received access to the system to verify ACP eligibility and has begun conducting outreach at Parkway Place.
June 2023	LMHA Team continues outreach for ACP at Parkway Place.

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)

October 2022	No new spaces identified.
November 2022	No new spaces identified.
December 2022	ON HOLD until Wi-Fi is installed, Spring of 2023.

June 2023

Potential for space identified in the CORE office at Dosker, but will require some construction to make it useable.

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)

October 2022

Legal Aid held their second office hours at Wiggins. No significant participation. Will look at offering workshops in 2023.

April 2023

No updates to report.

May 2023

No updates to report.

June 2023

No updates to report.

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)

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.

September 2022

Public Info Coordinator to meet with a new homeownership team in late September to create content for future Homeownership Program marketing materials.

October 2022

No updates to report.

November 2022

ON HOLD for new Public Information Coordinator.

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

March 2023 Team met with 1st District Councilwoman Hawkins to explain HPP program. Councilwoman Hawkins plans to distribute HPP flyers to homes in her district that meet the purchase by date of the program.

April 2023 Team has reached out to Bates Community Development Corporation, and met with Habitat for Humanity to explore possible collaboration.

May 2023 Team has received information from Habitat for Humanity and will begin reaching out to homeowners concerning HPP eligibility.

June 2023 [Program information is now available at the Louisville Urban League office.](#)

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. BENCHMARK COMPLETED

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

March 2023	Placed a Section 3 Introduction video on the LMHA website to help persons who receive housing assistance understand the opportunities that the regulation can provide.
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April 2023	No updates to report.
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May 2023	No updates to report.
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June 2023	<u>No updates to report.</u>
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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.
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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)

March 2023

Sheppard Resident Council elections are now April 14.

April 2023

Sheppard Square Resident Council elected.

May 2023

Liberty Green Resident Council election set for June 28.

June 2023

[Liberty Green Resident Council elected.](#)

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.

ON GOING

Efforts to assist public housing households apply for rental assistance are ON GOING.

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)

December 2022

No updates to report.

January 2023

No updates to report.

February 2023

No updates to report.

March 2023

ON HOLD pending creation of employee newsletter.

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)

March 2023

On March 8, attended Equity in Contracting & Procurement Task Force meeting for consultant presentation on city-wide preliminary disparity study information, in order to better understand issues associated with barriers to MWDBE vendor participation.

April 2023

LMHA attended the Joint Utility Contractor networking event to promote LMHA projects with MWDBE and Section 3 contractors on April 13.

May 2023

On May 15, LMHA attended the Louisville Metro Government Human Relation Commission's "Move Forward Monday" to network with contractors that may be interested in bidding LMHA projects.

June 2023

[LMHA is currently planning a contractor outreach event, to be held in July.](#)

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

March 2023

Met various business owners at the Veteran's Club of Louisville during the Veteran Owned Business networking event on March 28 to discuss

opportunities available at LMHA.

April 2023

Met with the OneWest Plan Room manager to discuss assisting MWDBE contractors with bid documents and a mentoring program for contractors to add environmental abatement to their companies on April 20.

May 2023

LMHA attended the Veterans Club of Louisville contractors networking event to discuss construction projects and Section 3 opportunities on May 9.

June 2023

No updates to report.

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)

March 2023

Placed a Section 3 Introduction video on the LMHA website to help persons who receive housing assistance understand the opportunities that the regulation can provide.

April 2023

LMHA contacted multiple MWDBE and Section 3 contractors, in person and via email, to encourage participation on Phase IV on the Beecher renovation project by providing the proposed general contractors contact information.

May 2023

LMHA certified two (2) MWDBE vendors in the first quarter of 2023 located in West Louisville in order to help them participate on capital construction projects.

June 2023

LMHA certified three (3) MWDBE vendors.

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

March 2023

Currently in the process of scheduling a community meeting for late April.

April 2023

Held meeting for former Iroquois residents & community members on April 25 to share & get feedback on building plans, anticipated timeline, occupancy preferences & criteria, how to get on interest list, Section 3 opportunities, & MWDBE opportunities.

May 2023

No updates to report.

June 2023

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)

March 2023

Added the Section 3 Introduction flyer to the Vision Russell website in order to increase public awareness of the Section 3 regulation and LMHA's commitment to it.

April 2023

LMHA made a presentation and passed out flyers at the Iroquois

community meeting to educate past residents and the local community on the Section 3 regulation on April 25.

May 2023

LMHA had a booth at the Kentucky Public Procurement Association's "Reverse Trade Show" to meet new contractors and discuss MWDBE Certification and the Section 3 regulation on May 22.

June 2023

No updates to report.

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)

March 2023

LMHA staff continue to work on Iroquois Senior Living Community pre-development activities.

April 2023

LMHA staff continue to work on Iroquois Senior Living Community pre-development activities.

May 2023

LMHA staff continue to work on Iroquois Senior Living Community pre-development activities.

June 2023

LMHA staff continue to work on Iroquois Senior Living Community pre-development activities.



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)

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.

September 2022

Passed out Sec. 3 and MWDBE brochures during two Sept. events. Working with a local, MBE production company to develop LMHA-themed videos. LMHA's mission and work is included in the latest playbill at the KY Opera.

October 2022

Story on LMHA's homeownership program was covered by all tv news outlets. Website development underway to be completed by early 2023

November 2022

ON HOLD for new Public Information Coordinator.

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

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.

September 2022

Named members of a potential social media committee and developed an initial plan on how to create consistent, effective Facebook posts.

October 2022

ON HOLD for new Public Information Coordinator.

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)

September 2022

Highlighting LMHA's Homeownership program in October via press release. Public Information Coordinator is speaking with a new homeowner to use for future marketing materials and presentations. Created a video schedule of programs to highlight.

October 2022

MBE production company filmed a Sec. 3 video that will be prepared by the end of 2022. Images from Homeownership success story will be included in Objective 5C - which is also underway.

November 2022

ON HOLD for new Public Information Coordinator.

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.

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

ON HOLD

ON HOLD until Benchmark 5C1 is completed.

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)

August 2022 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.

September 2022 Speaking with IT to explore communications options in Yardi. Still saving materials for potential intranet hub. Hub will match the look of LMHA's updated website in 2023.

October 2022 Website/HUB upgrade still underway. List of potential intranet materials saved for next Public Information Coordinator.

November 2022 No updates to report.

December 2022 ON HOLD for new Public Information Coordinator.

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.

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. (Annually)

ON HOLD

ON HOLD until Dec 8, 2022 Census will release its 5 year data update which will be reflected in the L.A.P. Public Info Coord. and Compliance Officer will meet to update numbers. Compliance Off. continues to seek HUD Guidance.

January 2023

Census reporting has been delayed. Will proceed once it is available.

May 2023

No updates to report.

June 2023

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.

Benchmark 5E3: Implement language plan to improve outreach. (3/15/2023)

June 2022

Plan discussed and presented to new compliance officer

ON HOLD

ON HOLD until Benchmark 5E2 is completed.

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)

March 2023

Completed additional training with Finance.

April 2023

Completed the implementation of Sheppard Square unit/resident data and began updating data that was not available for software conversion

May 2023

Began submitting HUD 50058 forms to HUD for Sheppard Square via Yardi software (success)

June 2023

No updates to report.

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

October 2022 On site training conducted.

November 2022 Go-Live completed for HCV; all areas are now LIVE using Yardi; Training continues as needed.

December 2022 Training continues as needed.

ONGOING Training continues as needed.

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)

February 2023 No updates to report

March 2023 The Audit has been uploaded to HUD.

May 2023 No updates to report

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June 2023

No updates to report.

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.
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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.
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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.

April 2023

No updates to report

May 2023

No updates to report

June 2023

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)

March 2023

Public Housing emails in Yardi: 38; (up 23) HCV emails in Yardi 1923 (up 120).

April 2023 Public Housing emails in Yardi: 70; (up 47) HCV emails in Yardi: 1985 (up 62).

May 2023 Public Housing emails in Yardi: 96 (up 26); HCV emails in Yardi: 2110 (up 125)

June 2023 Public Housing emails in Yardi: 122 (up 26); HCV emails in Yardi: 3027 (up 917)

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

March 2023 Rent Café implemented for HCV landlords. Anticipating implementation for PH in May and HCV participants in July.

April 2023 Planning to implement resident portals for both PH and HCV in May. Waitlist to be implemented in June/July.

May 2023 Resident portal post for PH & HCV postponed until June 2023

June 2023 Resident portal piloted for Parkway Place and PBV program.

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: Faith Hood

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)

November 2022 ON HOLD under mid-January 2023.

January 2023 Preparing a plan to coordinate focus groups and find location options to host groups. BENCHMARK COMPLETED

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

February 2023 Focus Group #1- scheduled for 03/29 @ Liberty Green- 3 confirmed; Focus Group #2- pending; Focus Group #3- tentatively scheduled for 04/05/23

March 2023 HCV team focus group completed 3/30/2023. Special Program focus group scheduled for 4/5/2023 & Prop Management Supervisors focus group scheduled for 4/6/2023.

April 2023

PH (property managers/ maintenance supervisors) focus group completed 04/06/2023; PH (maintenance/admin asst./ housing specialist) focus group completed on 04/26/23. BENCHMARK COMPLETED

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.

May 2023

No updates to report.

June 2023

Currently reviewing survey responses.

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)

February 2023

Governance Committee is recommending that Commissioners have no more than three absences per year.

April 2023

No updates to report.

May 2023

No updates to report.

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June 2023

<u>No updates to report.</u>

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)

February 2023

Chairperson Harris asked all Commissioners to email her with at least two committees they would like to serve on.

April 2023

No updates to report.

May 2023

No updates to report.

June 2023

<u>No updates to report.</u>

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)

March 2023

No updates to report.

April 2023

No updates to report.

May 2023

No updates to report.

June 2023

No updates to report.

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

ON HOLD

ON HOLD until Benchmark 8b1 is completed.

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)

February 2023 All committees will write formal charters. Template will be provided.

April 2023 No updates to report.

May 2023 No updates to report.

June 2023 No updates to report.

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.

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)

March 2023

Evaluation tools will be circulated in April.

April 2023

Evaluation tools circulated for comment. One Commissioner responded with suggestions.

May 2023

ED Evaluation tool updated and is ready to finalize.

June 2023

[ED Evaluation tool converted to a fillable PDF and sent to Personnel Committee for review.](#)

Benchmark 8D2: Conducting evaluations. (June 30 of each year)

ON HOLD

ON HOLD until early 2023.

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.**

group of performance metrics (5 to 10) that will be reported out on quarterly. ~~Strategic~~
Planning

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

September 2022 Working with ED and Dan to form list and pulling Strategic Planning Committee back together with new members to have meeting to discuss.

December 2022 Nothing to report

January 2023 ON HOLD until agency has a better understanding of metrics that can be provided from Yardi.

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

ON HOLD ON HOLD until Benchmark 8E1 is completed.

Benchmark 8E3: Develop Report. (6/30/2023)

ON HOLD ON HOLD until Benchmark 8E2 is completed.

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)

March 2023 Financial briefing and ACOP/Admin Plan/MTW training completed.

April 2023 No trainings or briefings in April.

May 2023 No updates to report.

June 2023 No updates to report.

Benchmark 8F2: Survey Commissioners. (As Needed)

January 2023 ON HOLD until Governance Committee requests updated information.

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.

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)

March 2023

No updates to report.

April 2023

No updates to report.

May 2023

No updates to report.

June 2023

<u>No updates to report.</u>

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

December 2022

ON HOLD until agency has a better understanding of metrics that can be provided from Yardi.

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

ON HOLD

ON HOLD Benchmark 8G1 & 8G2 are completed.

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, Biennially)

**NO ACTION
NEEDED**

Next review due August 2024.