

# FRAMING THE FUTURE



## Housing Authority of Portland

### Framing the Future: Strategic Directions and Next Steps

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September 2010

# Thank you



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To our stakeholders,

The Housing Authority of Portland has provided affordable homes for low-income families and individuals for nearly seventy years. We are a successful developer, owner, and manager of a large and complex real estate portfolio with a variety of financing and subsidies, and we are a major administrator of rent assistance. Despite difficult economic times and a troubled real estate market, we are on solid ground in the delivery of this core mission. Knowing this will always be at the heart of our day-to-day work, we set out to define the strategic directions that will help us better focus on the “people” side of the equation: over 15,000 low-income households, including more than 10,000 youth.

We initiated this planning process in November 2009 to explore these possibilities. People who live and work in all corners of the community we serve offered their time and ideas to help us identify how we can be most effective in all areas of our mission, especially in collaboration with our local and regional partners.

We offer our deepest appreciation for their participation, and we invite you to read this report, which outlines our directions and the next steps we will take in pursuing those paths. As we move deeper into the implementation planning phase in the coming months, we pledge to keep you abreast of other opportunities to give us input. Thank you for helping us frame the future.

Our best,

Steve Rudman, Executive Director

Lee Moore, Chair, Board of Commissioners

# Overview of the Process



Strategic planning provides a platform to assess, reflect, and commit to new directions. HAP's planning process, while by definition future-focused, is firmly grounded in our mission and values.

## Our Mission

HAP's mission is to assure that the people of the community are sheltered.

HAP has a special responsibility to those who encounter barriers to housing because of income, disability, or special need.

HAP will continue to promote, operate, and develop affordable housing that engenders stability, self-sufficiency, self-respect, and pride in its residents and represents a long-term community asset.

HAP will be a community leader to create public commitment, policy and funding to preserve and develop affordable housing.

## Our Values

- Our cornerstone values are Respect, Fairness, and Honesty
- Our organizational values are Service, Support, and Stewardship
- Our business values are Partnership, Innovation, and Excellence

HAP also benefits from its Moving to Work (MTW) status, which allows more flexible programming tailored to local needs and goals. Nationally, MTW has three main objectives: to provide incentives to families with children seeking employment and self-sufficiency; to increase housing choices for low-income households; and to increase organizational and cost efficiencies. The strategic plan and its proposed implementation activities use HAP's MTW flexibility to meet these objectives and serve more households wherever possible.

## Our Process

Over the past several months, with the assistance of local consulting firm Decisions Decisions, HAP has engaged the community in a spirited dialogue to consider strategic directions for the future. Each interaction focused on issues directly relevant to the particular individual or group engaged. A list of participants can be found on pages 10-11; a separate report provides a detailed summary of their input and is available upon request.

More than 2,400 members of the HAP community – residents and program participants – were involved through listening sessions and written surveys. The Resident Advisory Committee (RAC) played an active role in planning and implementing this unprecedented outreach effort.

Almost 200 community partners – other jurisdictions, housing providers, service providers, for-profit housing industry, and minority community representatives – were engaged through individual conversations, focus groups, and an online survey.

Every member of HAP's Board of Commissioners, leadership team, and workforce participated through individual interviews, group discussions, and written surveys.

This major outreach effort revealed a strong spirit of community partnership and a remarkable degree of agreement on future directions.

The information was analyzed, organized, and evaluated by HAP's leadership and consultants. HAP's Board discussed their recommendations and set preliminary directions.

This led to a second round of outreach – involving dozens of stakeholders – to introduce and discuss these new strategic directions. HAP's senior leadership and consultants met with the RAC, jurisdictional partners, advocates, community development corporations, service providers, and representatives of communities of color.

Altogether, these efforts resulted in a broad consensus on strategic directions and a commitment to work together as even stronger partners in the future.



## **Direction 1: Prioritization of Housing Resources**

HAP will align a larger portion of its housing resources with community partners in order to better serve priority populations, distinguishing between the needs of very low-income work-able families, seniors and people with disabilities.

## **Direction 2: Housing-Services Continuum**

HAP will provide for core resident services, including enhanced property management to support housing stability and foster self-sufficiency, with its own staff and partner agencies. HAP will coordinate the delivery of other types of resident services through strategic partnerships with local providers.

## **Direction 3: Partnership within the HAP Community**

HAP will strengthen its relationship with residents and program participants by working with them to develop a more defined set of mutual responsibilities, expectations and accountability.

## **Direction 4: Role in the Regional Housing Market**

HAP will leverage its expertise in affordable housing operations, development, and rent assistance administration to further local and regional housing goals. HAP will increase its responsiveness to housing needs in mid-County and East County through the alignment of resources and coordination with local representatives. HAP will expand its work with neighboring counties when there are opportunities to collaboratively address issues on a regional basis. HAP will serve as a policy advocate and strategic partner in the metropolitan area.



The following principles will guide the agency as it pursues its strategic directions:

## Equity

**HAP will work with representatives of diverse communities to ensure fairness and cultural competence in all HAP activities: housing, services, employment, and contracting.**

HAP has a proven track record of achieving economic equity in contracting with women, minority and emerging small businesses. This success extends to increasing workforce opportunities for low- and very low-income people in our community, including our residents and participants. Through its recently unveiled economic equity initiative, HAP will work to increase access to opportunities for low-income and disadvantaged communities in all areas of its business and to support the efforts of the larger community to increase equity and inclusivity.

## Strategic Partnerships

**HAP will strategically align itself and collaborate with partners to fill gaps in community needs and achieve common ends.**

HAP has strong relationships with jurisdictional and community partners that expand the capacity to serve low-income households beyond the ability of any one agency. However, there remain significant opportunities to deepen existing partnerships and develop new ones that are more grounded in mutual accountability, risk taking and long-term planning in order to maximize impacts. HAP will dedicate time and resources to develop these partnerships to make best use of agency resources and fulfill community-wide goals in affordable housing and poverty reduction.

## Organizational Development

**HAP will take full advantage of the strength of its management and staff by instituting policies and practices that support their ability to be effective.**

HAP will continue to hone its efforts in effective recruitment, retention, management, and professional development. This requires clear and open communication, commitment to inclusion, collaboration among departments, planning for long-term succession, and a sense of partnership with organized labor. Concurrently, HAP will work to identify any organizational infrastructure and capacity changes that would be needed in order to achieve the strategic directions and implementation steps.

# 1 Prioritization of Housing Resources



## Direction

**HAP will align a larger portion of its housing resources with community partners in order to better serve priority populations, distinguishing between the needs of very low-income workable families, seniors and people with disabilities.**

## Background

HAP currently uses waiting lists and lottery systems to allocate most of its housing resources, with some assistance targeted to populations with specific needs. While this will continue to be the approach for the majority of applicants, there are opportunities to align HAP's resources with those of local partners who can provide services to improve housing and economic outcomes for low-income households, as well as to respond to emerging priorities in the community. There is also an opportunity to leverage housing resources to serve more households. Understanding that prioritizing additional housing resources would reduce the amount that is allocated to the general waiting list, most stakeholders agreed with the approach of increased prioritization.

## Moving Forward

Based on an evaluation of local needs, resources, and gaps, HAP will work with its stakeholders, jurisdictional partners and other partners to determine how its resources might be more strategically utilized and aligned with other community assets in the following ways:

### 2010-11

- Determine the proportion of resources dedicated to the priority populations such as seniors, people with disabilities, and work-able families, with the majority of resources continuing to serve those on the traditional wait list / lottery.
- Develop criteria for determining underserved groups within the priority populations, such as those with culturally-specific needs, and align goals and resources with community partners that serve those groups.
- Consider increasing HAP's commitment to agency-based assistance programs, such as Short Term Rent Assistance, to provide shallow, shorter-term subsidy in conjunction with service providers that address targeted populations and serve more households.
- Maximize MTW funding flexibility to create tools such as Local Blended Subsidy that will better leverage HAP's financial resources.

### 2011-12

- Create multiple tracks for moving people into and out of HAP housing, considering short-term and long-term housing needs as well as partnerships with service providers.

- Determine how many more households may be served through short-term and intermediate-term assistance.

### 2012-13

- Implement a long-term strategy for HAP-served populations who are aging and have increasing needs but do not yet require nursing care. Consider developing or renovating housing that allows elderly and disabled populations to transition from independence to aging in place.

### Ongoing

- Pursue HUD opportunities, including competitive processes for funding, to serve specific populations.
- Measure effectiveness of different levels of subsidy for different populations in achieving the intended outcomes. Create metrics for success at the beginning of such local programming, budget funds for ongoing and regular data collection and evaluation, and evaluate consequences – intended and unforeseen – of such prioritization.

# 2 Housing-Services Continuum



## Direction

**HAP will provide for core resident services, including enhanced property management to support housing stability and foster self-sufficiency, with its own staff and partner agencies. HAP will coordinate the delivery of other types of resident services and service-enriched housing through strategic partnerships with local providers.**

## Background

In recent years, HAP has made progress in sharpening its focus around the provision of housing as its core competency and mission, while working with partners to provide needed services for residents and participants. The strategic planning process affirmed that its stakeholders see HAP's role as providing enhanced property management – connecting people to the services they need –and that local providers have the expertise to meet other human service needs. With this clarity, HAP will move forward in deepening partnerships that leverage greater resources than any one agency may be able to garner on its own and that move toward systemic solutions of the issues faced by the HAP community.

## Moving Forward

HAP will continue providing core resident services in-house, while increasing its emphasis on strategic partnership development through the following activities:

### 2010-11

- Identify service gaps through annual planning, determine which buildings and populations have the most need for on-site services coordinators (whether provided by HAP or through partners) and work to connect residents with appropriate service providers in the community.
- Continue efforts to significantly broaden participation, and sharpen the service-delivery approach, in HAP's self-sufficiency programs.
- Pursue a partnership with Oregon's workforce system to increase access for HAP participants in job development, training, and internship opportunities.
- Advance current planning to enhance strategic partnerships. Assess needs across public housing and Section 8, as well as across population types, then develop and strengthen relationships with providers who can meet those needs.

### 2011-12

- Enhance on-site resident services through co-located partner agency staff and through volunteerism in buildings serving elderly and disabled populations.

### Ongoing

- When working with community-based providers, HAP and those providers will determine the parameters to ensure joint responsibility, clear expectations, and mutual accountability, including provisions for specific metrics and outcomes.
- Through annual planning, determine unmet resident services needs and assess those most likely to be funded through philanthropic organizations. Work with partners to pursue mutual fundraising towards these ends. Explore opportunities such as AmeriCorps and community service - oriented programs that leverage additional resources and opportunities for resident skill building.

# 3 Partnership within the HAP Community



## Direction

**HAP will strengthen its relationship with residents and program participants by working with them to develop a more defined set of mutual responsibilities, expectations and accountability.**

## Background

HAP has recently increased efforts to engage the community of residents and participants in proactive communication and problem solving. Results have been positive and were reinforced by very strong interest in active participation during the strategic planning process, demonstrating a desire to partner in working for the betterment of the communities and the agency.

## Moving Forward

HAP will build on the positive working relationship with its Resident Advisory Committee and on the feedback that residents and participants provided during the strategic planning process in the following ways:

### 2010-11

- Simplify the rent calculation method for public housing and Section 8, in order to remove disincentives to employment for low-income families, as well as to make the process easier to understand, less prone to error, and less intrusive.
- Continue to work with legal counsel, HAP staff and third party property managers to continually refine a livability and public safety focus and increase consistency in lease enforcement. Engage the landlord community to support lease and program enforcement.
- Increase efforts to engage the 10,000 children and youth living in public housing and Section 8 households, focusing on the areas of youth employment, education, recreation, and positive community involvement. Connect parents and families with resources that serve youth.

### 2012-13

- Empower members of the HAP community to take more ownership of their communities and pilot incentives that encourage engagement to improve community livability and reinforce community values.
- Define and strengthen HAP's volunteer program, both for members of the HAP community and for other local residents. Assess opportunities for volunteerism, volunteer recruitment and the use of stipends or incentives.
- Develop resident and participant communications that reflect HAP's expectations for its residents and participants as well as expectations that residents and participants should have of HAP (including customer services standards). Revamp HAP's internet presence, as well as its written communication and its orientation materials.

### 2011-12

- Work with residents and participants to define mutual roles and responsibilities, and encourage resident involvement in establishing core values for apartment communities.
- Ensure consistent application of HAP's values and its relationship within the HAP community across all HAP properties, including those managed by third parties. Empower residents to communicate with their property managers in support of those values.
- Implement a tiered self-sufficiency program with varying levels of service and connection to community partners depending on household needs and barriers to work. Implement a track that emphasizes the value of education and job training. Encourage efforts to leave housing assistance through increased self-sufficiency.

### Ongoing

- As opportunities arise, pursue resource development and ways to leverage HAP's investment.

# 4

## Role in the Regional Housing Market



### Direction

**HAP will leverage its expertise in affordable housing operations, development, and rent assistance administration to further local and regional housing goals. HAP will increase its responsiveness to housing needs in mid-County and East County through the alignment of resources and coordination with local representatives. HAP will expand its work with neighboring counties when there are opportunities to collaboratively address issues on a regional basis.**

**HAP will serve as a policy advocate and strategic partner in the metropolitan area, including acting as a funding champion.**

### Background

HAP serves all of Multnomah County and used the strategic planning process to explore perceptions around its relationship outside of Portland proper, as well as interest in growing trends in regional planning and service delivery. Partners want to see HAP increase support of mid and East Multnomah County, as well as build a foundation for opportunities on a regional scale.

### Moving Forward

HAP staff will strengthen existing connections and build new relationships to increase its ability to provide leadership and integration with the larger metropolitan area in the following ways:

#### 2010-11

- Assess the impacts and costs of a name change in order to facilitate a decision by HAP's Board of Commissioners.
- Jointly fund a City of Gresham staff position for housing and community development planning and to serve as a liaison between HAP and Gresham.
- Actively explore opportunities for greater coordination and mutually beneficial activities outside of Multnomah County. Continue collaborative efforts with housing authorities in Clackamas, Washington and Clark Counties, including the consideration of creating a regionally-based Housing Choice Voucher (Section 8) rent assistance program.

#### Ongoing

- Expand HAP's role as a policy leader and advocate on behalf of regional housing needs by identifying opportunities for more housing resources at a legislative and national level.
- Build durable collaborations in mid and East-county based on mutual benefit and respect; alignment of policies, priorities, and resources; and responsiveness to local needs in keeping with HAP's mission.
- Consider using HAP's capacity to assume the roles of master developer or asset manager for large, complex projects when requested by public and nonprofit partners.

#### 2011-12

- Work with HUD to explore the creation of a formal rent assistance consortium with local county housing authority partners.

# Sources of Stakeholder Input



## External stakeholders

- Mike Abbate, Gresham Planning Office
- Kate Allen, Portland Housing Bureau
- Trell Anderson, Clackamas County Housing Authority
- Fran Ayaribil, Loaves and Fishes
- Shane Bemis, Mayor, City of Gresham
- Tony Bernal, Transition Projects Inc
- Liora Berry, Cascadia Behavioral Healthcare
- Kris Billhardt, VOA Home Free
- Lauren Booth, Children's Justice Alliance
- Tom Brenneke, Guardian Real Estate Services
- Sam Brooks, Oregon Association of Minority Entrepreneurs
- Sherrie Burrell, Dept of Human Services
- Marj Cannon, Metropolitan Family Services
- Paula Carder, PSU - College of Urban & Public Affairs
- Brenda Carpenter, NW Pilot Project
- Vince Chiotti, Oregon Housing and Community Services
- Leslie Coefield, Lifeworks NW
- Jeff Cogen, Chair, Multnomah County
- Tanya Colie McGee, Providence Elder Place
- Rick Cramer, Oregon Housing and Community Services
- Tom Cusack, US Dept of Housing and Urban Development, retired
- Larry Dalton, Department of Human Services
- Jean DeMaster, Human Solutions
- Jillian Detweiler, TriMet
- Eileen Devine, Veterans Administration
- Phil Donovan, NW Public Affairs
- Patricia Edge, Big Brothers - Big Sisters
- Susan Emmons, NW Pilot Project
- Rey Espana, NAYA Family Center
- Ian Finch, NAYA Family Center
- Nick Fish, Commissioner, City of Portland
- Jacob Fox, Portland Housing Bureau
- Donita Fry, NAYA Family Center
- Joanne Fuller, Department of Human Services, Multnomah County
- Bob Gillespie, Oregon Housing and Community Services
- Tim Gillette, Talbot, Korvola & Warwick, LLP
- Michelle Haynes, REACH CDC
- Jose Hernandez, El Programa Hispano
- Kayse Jama, Center for Intercultural Organizing
- Roy Jay, African American Chamber of Commerce
- Thomas Jensen, CASA VIDA
- Nathan Johnson, Boys and Girls Club
- Marc Jolin, JOIN
- Deborah Kafoury, Commissioner, Multnomah County
- Komi Kalevor, Portland Housing Bureau
- Beth Kaye, Portland Housing Bureau
- Daniel Ledezma, office of City Commissioner Nick Fish
- Michelle Lewis, Children's Justice Alliance
- Mary Li, Community Services - Office of School & Community Partnerships, Multnomah County
- Robert Liberty, Metro
- Sgt. Marvin Madtson, Gresham Police Department
- Traci Manning, Central City Concern
- Andrew Mason, Open Meadow
- Joy McCray, US Dept of Housing and Urban Development
- Patricia McLean, Human Solutions
- Ed McNamara, Turtle Island Development
- Victor Merced, Oregon Housing and Community Services
- Andy Miller, Portland Housing Bureau
- Michael Parkhurst, City of Gresham
- Nancy Pearson, Portland Youth Builders
- Judi Pitre, Black United Fund
- Chief Mike Reese, Portland Police Bureau
- Jeff Reingold, Income Property Management

# Sources of Stakeholder Input



- Molly Rogers, Housing Development Center
- Zarod Rominski, Outside In
- Alice Rouyer, City of Gresham Redevelopment Commission
- Peggy Samolinski, SUN Schools
- Nick Sauvie, ROSE CDC
- Jill Sherman, Gerding Edlen Development Co.
- MaryLee Stahl, Lifeworks NW
- Jessica Stevens, Girl Scouts
- Sarah Stevenson, Innovative Housing, Inc.
- Susan Stoltenberg, Impact NW
- Jonathan Trutt, NW Housing Alternatives
- Val Valfre, Washington County Dept of Housing Services
- Margaret Van Vliet, Portland Housing Bureau
- Kelly Walker, Mount Hood Community College
- Bob Walsh, Walsh Construction Co.
- Becky Wehrli, Community Leader
- Ramsay Weit, Community Housing Fund
- Serena Wesley, Self Enhancement Inc
- Jeri Williams, Office of Neighborhood Involvement
- Jim Winkler, Winkler Development
- Sue Wiswell, ROSE CDC
- Amy Youngflesh, Portland Community College
- *Six members of the HAP community participated in Focus Groups; their names have been omitted to preserve their privacy.*

## **Internal stakeholders**

- Board members (individual interviews)
- Senior managers (questionnaires)
- Employees (staff survey)
- Union leaders (Small group interview)

## **Resident Advisory Committee**

- O'dell Carmicle
- Irina Faer
- LaTasha Frison
- Alvaro Gongora
- Myra Harrell Fleming
- Anne Kornfeld
- Darrell LaVallee
- Benita Legarza
- Terry McLain
- Aloha Palmer
- Martha Perez
- Amie Pico
- Patrick Smith

## **Listening Sessions with members of the HAP community**

- March 13, PCC Cascade Campus, 48 attendees
- March 20, NW Children's Theater, 28 attendees
- March 21, Rockwood Branch of Multnomah County Library, 23 attendees

## **Survey of HAP residents**

- 398 responses

## **Survey of Section 8 voucher-holders**

- 1,942 responses

## **Online survey of community partners**

- 80 responses

**For more information about HAP's strategic planning and implementation steps, contact:**

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Thank you!