



# ROCKFORD HOUSING AUTHORITY

## FIVE-YEAR STRATEGIC PLAN 2023 - 2028

*Moving Forward Together*

*November 2022*

## Section 1. Executive Summary

We are pleased to share the Five-Year Plan of the Rockford Housing Authority, "***Moving Forward Together.***" – our shared strategic plan to create a public good for our residents and the community we serve. This is a targeted and intentional plan with Seventeen Goals and Seventeen strategic and foundational objectives, with Twenty-one initiatives. Because of the input of the RHA Staff, community partners, and constituents, "***Moving Forward Together***" belongs to each of us.

We will keep sight of our goals to redefine resident success and elevate our commitment to redevelopment, workforce education, partnerships, and external affordable housing engagement. To accomplish these objectives, we must be efficient and effective. Above all, it is people – our residents, staff, partners, parents, families, friends, and community members – that power our agency and help us achieve excellence. We will use the term collective action, which has its formulations and theories in many areas of the social sciences, including psychology, sociology, political science, and economics. We believe this collective action is taken together by a group of people whose fundamental goal is to enhance the condition around them and achieve a common objective... "***Moving Forward Together.***"

The RHA "***Moving Forward Together***" Five-Year Strategic Plan demonstrates our commitment to embracing our role as a 21st-century public housing agency for the public good. While this plan builds off our momentum and will serve as our agency's guiding strategy, it is not defined just by goals and metrics. Our actions define it by our collective aspirations and limitless potential. It is characterized by our journey aptly named "***Moving Forward Together.***"

With the input from our executive leadership team and a commitment from each to implement a plan that understands all facets of our Agency and the population served, we have created a roadmap to our future that empowers all and creates a solid foundation for RHA to solidify our position within the community.

In this document, the reader will find what, how, when, and why our RHA team will develop a comprehensive ongoing work plan that outlines both short-term and long-term deliverables and will set in place processes and scorecards to ensure these goals and objectives will be met in the coming years.

Creative ideas are the basis for many of the initiatives in this plan. The individuals, groups, and employees who helped shape this plan will also be pivotal partners in helping us implement this vision of "***Moving Forward Together.***" We will rely on our continued transparency, clarity, and openness in the coming years to ensure that this plan creates better neighborhoods within our community.

## Section 2. Vision

The RHA Leadership Team revisited the detailed vision written in 2013 and was updated in 2022. The revised Vision Statement establishes the commitment of the Agency's time, resources, assets, and energy to this worthy vision, working in conjunction with the Move to Work Initiative.

RHA provides pathways for people to enhance their quality of life through inclusive, affordable, and innovative housing initiatives while investing in the education, training, and personal development of our residents through strategic programming and partnerships while serving as a facilitator for neighborhood restoration by investing in our community and remaining committed to creating an atmosphere that promotes overall health, wellness, and economic growth, for a greater quality of life.

### Section 3. Mission

To become the Agency we aspire to be; we must continue to work toward being more diverse, inclusive, and enlightened. We aspire to be a resident-centered launch for the community's future. We are guided by this effort in our decision-making to remain focused on our mission. We believe that we can make a meaningful difference in our community through sustained actions while building trust. As we continue to take critical steps to recruit, retain, and promote diverse talent in the makeup of our team members, there is no doubt about the need to build stronger cultures of belonging. We know that the challenging work of truly achieving equity, transparency, and representation continues to lie ahead of all of us. Through our Agency's mission, we will create a culture of innovation and accountability within our organization and empower the RHA Team to drive the future success of our residents.

**To continue to create strategic partnerships with community stakeholders, design a diverse housing portfolio, and leverage social service programming to unite and ensure residents are provided with safe and nurturing environments that lead to self-sufficiency, responsibility, and individual empowerment.**

### Section 4. Core Values

The Rockford Housing Authority's Core Values drive our behavior and have formed the tenets of our beliefs. People in satisfying corporate relationships will often say their team shares their values. **"Moving Forward Together"** cannot be done without these foundational values, which serve the highest common good, and not only dictates how we live our lives but is a pathway to success for the Agency and the individuals we serve.

**The Core Values remain the same:**

<b>Leadership</b>	<b>Resourcefulness</b>	<b>Collaborative</b>	<b>Professional</b>
<b>Quality</b>	<b>Accountability</b>	<b>Consistency</b>	
<b>Integrity</b>	<b>Caring</b>	<b>Respectful</b>	

## Section 5. Goals

Over the next Five Years, RHA will reach new horizons by proactively focusing on our goals which include Human Services, RHA Team Leadership, quality affordable homes, and innovative WorkForce Initiatives.

RHA has identified high-impact areas aligned with the overall vision of the Plan and the RHA mission. We will have set goals, and defined objectives, and create actionable plans to achieve each. Serving as a roadmap charting the course for the next Five Years, the strategic plan's goals will guide our decisions, influence behaviors, and inspire confidence in the mission of our organization while producing results for our residents and fulfilling the needs of our community.

## Section 6. Strategies

### Sub Section A. Six Focus Areas

In the 2022 preparational journey and assessment phase, the organizational-wide planning committee divided the four areas of concentration into six focus areas when laying out the "***Moving Forward Together***" Plan based on the prior RHA Five Year Plan. The Plan furthers and aligns with the overarching goals and key initiatives of the Moving to Work (MTW) Initiative Plan.

These areas are now divided in this organizational fashion:

1)	<b>Finance</b>	<i>(Represented by green in the Action Plans)</i>
2)	<b>Partners and Stakeholders</b>	<i>(Represented by blue in the Action Plans)</i>
3)	<b>Products and Services</b>	<i>(Represented by orange in the Action Plans)</i>
4)	<b>Clients</b>	<i>(Represented by pink in the Action Plans)</i>
5)	<b>Administration</b>	<i>(Represented by tan in the Action Plans)</i>
6)	<b>Employees</b>	<i>(Represented by purple in the Action Plans)</i>

## Sub Section B. Seventeen Organizational Goals

### 1) Finance

*(Represented by green in the Action Plans)*

1. Improve the existing financial reports to allow for more effective and useful information for property management teams, contractors, and vendors.
2. Increase agency revenue by increasing collections of delinquent rents.
3. Create non-HUD supported funding sources to support additional quality affordable housing.
4. Partner with Financial Institutions (to fund redevelopment efforts, to fund home ownership program for LIPH residents).
5. Secure Funding – Section 3 (increase agency revenue through contracting Section 3 services).
6. Automate Processes (bill payment, invoicing, landlord payments).
7. Create a wholly independent non-profit organization established as a foundation, operated under its own governance.

### 2) Partners and Stakeholders

*(Represented by blue in the Action Plans)*

1. Improve the overall individualized case management system to provide the highest, best empowerment service for our RHA clients.
2. To improve the overall communication and transparency by updating all policies and procedures for partners, stakeholders, and constituents.

### 3) Products and Services

*(Represented by orange in the Action Plans)*

1. To improve the overall performance of quality affordable units, we will review, improve, identify, and create new methodologies for the highest best good of all RHA products, programs, and operational services.
2. RHA will identify Public Housing Units for repositioning and dispositioning, and will review the many distinct options, which are associated with the planning considerations available to Public Housing Agencies (PHAs) housing units, as the agency considers the long-term future of the RHA Housing Portfolio.

### 4) Clients

*(Represented by pink in the Action Plans)*

1. Increase, expand, and improve the overall individualized resident case management capabilities, and educational and training opportunities through the MTW Initiative, the Lifeforce Development Institute, and the Jobs Plus Initiative to provide the highest, best empowerment service for our clients.
2. Boost resident collections of delinquent rents by improving internal communication flow and coordination to ensure information quality, consistency, and effectiveness whereby RHA will realize, increased revenue.

**5) Administration**

*(Represented by tan in the Action Plans)*

1. With the introduction and initiation of MTW, the RHA Admin will devise and institute alternative business procedures to achieve overall consistency and standardization.
2. Embrace our ongoing responsibility to communicate effectively with the public, residents, and constituents.
3. Working with Our Strategic Media Partner, continue to build organizational capacity, for the RHA, MTW, Brand Identity, and Branded Content Creation.

**6) Employees**

*(Represented by purple in the Action Plans)*

1. Improve the overall RHA corporate culture through measurable proactive communication, in formal group settings and individualized engagement to increase camaraderie and inclusion through the RHA core values.

**Section 7. Action Plans**

**Sub Section A. ROCKFORD HOUSING AUTHORITY STRATEGY SCORECARD**

**MISSION:** To continue to create strategic partnerships with community stakeholders, design a diverse housing portfolio, and leverage social service programming to unite and ensure residents are provided with safe and nurturing environments that lead to self-sufficiency, responsibility, and individual empowerment.

**VALUES:** Leadership, Quality, Accountability, Integrity, Consistency, Resourcefulness, Care, Collaboration, Respect, Professionalism.

**VISION:** RHA provides pathways for people to enhance their quality of life through inclusive, affordable, and innovative housing initiatives while investing in the education, training, and personal development of our residents through strategic programming and partnerships while serving as a facilitator for neighborhood restoration by investing in our community and remaining committed to creating an atmosphere that promotes overall health, wellness, and economic growth, for a greater quality of life.

FOCUS AREA	GOALS	PERFORMANCE OBJECTIVES	MEASURES	TARGETS	INITIATIVES
<p><b>FINANCE</b></p>	<ul style="list-style-type: none"> <li>• Improve the existing financial reports</li> <li>• Increase agency revenue</li> <li>• Create non-HUD-supported funding sources</li> <li>• Partner with Financial Institutions</li> <li>• Secure Funding for Section 3</li> <li>• Create a wholly independent non-profit organization established as a foundation, operated under its own governance.</li> </ul>	<ul style="list-style-type: none"> <li>• Create a new financial reporting process.</li> <li>• Adjust lease/policy to include lease enforcement.</li> <li>• Investigate, Identify, and secure alternative revenue streams to finance redevelopment for additional affordable units, independent of HUD or State funds.</li> <li>• Establish partnerships to financially support the redevelopment of quality affordable units and a homeownership program for LIPH residents.</li> <li>• Contract for Section III monitoring and compliance services with other housing authorities or public entities that receive HUD funding.</li> <li>• To provide expedited processing of invoices, and payments to vendors, contractors, and landlords by streamlining all administrative processes.</li> <li>• To solicit community support and investment, while applying for grants that are not available to the housing authority, an Independent Public Foundation will be implemented.</li> </ul>	<ul style="list-style-type: none"> <li>• Gain feedback from property management teams and provide information to finance leadership.</li> <li>• Review financial statements monthly for all sites independently to determine % of any increase or decrease in collected rents.</li> <li>• Create and add an additional 20 units to the Bridge Rockford portfolio, per calendar year.</li> <li>• To establish partnerships with no less than three financial institutions to support redevelopment efforts and finance no less than five home ownership mortgages per calendar year.</li> <li>• Secure no less than five contracts with agencies each year and participate in three conference or private training sessions annually.</li> <li>• Create a satisfaction survey to allow for feedback, to be reviewed by the finance Director on a monthly basis and make adjustments when necessary.</li> <li>• Receipt of monetary, tangible, or in-kind donations will be monitored weekly and tracked and reported to the Foundation of Trustees on a quarterly basis.</li> </ul>	<ul style="list-style-type: none"> <li>• Simplify reports so managers have a better understanding and can calculate cost analysis and make defined projections.</li> <li>• Increase collected rents by 5% each year.</li> <li>• Create an average of an additional five affordable housing units for Bridge Rockford portfolio each calendar quarter, for the entirety of the Five Year plan.</li> <li>• RHA / Bridge Rockford will expand its capital portfolio over the Five Year Plan period, with an increased asset position of \$2.2 million.</li> <li>• Generate a minimum gross revenue in the amount of \$20k in the first year, with a 10% increase each year, via contracted services.</li> <li>• To identify policies and practices that will allow for faster processing of invoicing, billing, and payroll.</li> <li>• Once established, the Foundation will commence the solicitation for endowments, gifts, and donations, to fund the services and initiatives created for members or organizations of the low-income community.</li> </ul>	<ul style="list-style-type: none"> <li>• Review the Yardi module and output on an as-needed basis.</li> <li>• To increase site revenue through tenant obligation rents.</li> <li>• Increase opportunities and choices within opportunity areas for low-income individuals and families.</li> <li>• Establish a relationship with local, regional, or state financial institutions for community investment and support.</li> <li>• Market services to all municipal entities that receive HUD funding to gain visibility and credibility as a section III expert.</li> <li>• Review the current vendor for invoice processing to determine if other billing methods can be incorporated. If necessary, research alternative available resources for automation of current purchase orders, landlord payments, and reoccurring payables, while reviewing all roles and responsibilities within the finance department, and creating instructional training videos to ensure all staff is educated on financial responsibilities and timelines.</li> <li>• Adapt formalized Foundation and solicitation policies to outline the goals and intent of the Foundation and dictate how donations will be distributed or utilized.</li> </ul>

**Section 7. Action Plans**

**Sub Section B. STRATEGIC ACTION STEPS FOR FINANCE AND ADMINISTRATION**

<p><b>Partners and Stakeholders</b></p>	<ul style="list-style-type: none"> <li>• Improve the overall individualized case management system to provide the highest, best empowerment service for our RHA clients.</li> <li>• To improve overall communication and transparency by updating all policies and procedures for partners, stakeholders, and constituents.</li> </ul>	<ul style="list-style-type: none"> <li>• Create a strategic approach that encompasses an individual, personal approach that targets areas of disparity for all members within a household, and provides services, either internally or through partnerships, to overcome barriers to self-actualization.</li> <li>• Identify policies and procedures that outline expectations to ensure transparency and consistency.</li> </ul>	<ul style="list-style-type: none"> <li>• Acquire individual assessment of all household members at the onset of residency or through the annual recertification and establish needs and services.</li> <li>• Create a formal feedback platform that allows constituents to provide anonymous feedback, and partners to identify process-procedure barriers.</li> </ul>	<ul style="list-style-type: none"> <li>• Review and compare assessment files with Yardi residency records to verify 100% participation for all adult family members.</li> <li>• Ensure that all Human Services staff members, partners, and stakeholders are fully trained and educated on all service platforms.</li> </ul>	<ul style="list-style-type: none"> <li>• Ensure all adult members of the household create strategic goals to improve, education, training, health, and financial status. Review the financial module in YARDI.</li> <li>• To make improvements on the ongoing communication platform, and draft MOUs to outline expectations and reported results.</li> </ul>
<p><b>Products and Services</b></p>	<ul style="list-style-type: none"> <li>• To improve the overall performance of quality affordable units we will review, improve, identify, and create new methodologies for the highest best good of all RHA products, programs, and operational services.</li> <li>• RHA will identify Public Housing Units for repositioning and dispositioning, will review the many distinct options, which are associated with the planning considerations, available to Public Housing Agencies (PHAs) housing units, as the agency considers the long-term future of the RHA Housing Portfolio.</li> </ul>	<ul style="list-style-type: none"> <li>• Provide greater opportunities to our residents, by linking them to services and landlords utilizing our programs and operational initiatives, while providing safe, modern, quality, affordable housing.</li> <li>• The performance focus, of this objective is to "reposition," by converting through disposition housing unit properties, currently assisted under the Public Housing Program platform to the Section 8 Program, (HCV), and that proceeds be used for the provision of low-income housing or to benefit directly, the residents of RHA.</li> </ul>	<ul style="list-style-type: none"> <li>• Create and review on a monthly basis, indicators for the LIPH program that will monitor and track; the termination of lease work order generation and response unit inspection outcomes waitlist; the number of applications, and the duration of the tenancy term.</li> <li>• RHA will measure, assess, and evaluate what regulatory platform is best suited for RHA to meet the long-term affordable housing challenges in our community, considering the needs of the residents, the condition of the real estate housing portfolio, and the long-term objectives of RHA and other community leaders to sell, transfer, ground lease or otherwise dispose of public housing property.</li> </ul>	<ul style="list-style-type: none"> <li>• Through new methodologies RHA will realize greater productivity, and efficiencies and staff will be able to identify capital improvements to allow for a proactive approach to physical conditions and modernization efforts, relieving the operational budgets of emergency repairs, and incurring higher fees.</li> <li>• Targeting and focusing on, how and what is conducive to raising debt and equity, to help the agency achieve its Strategic Goals, from addressing backlogged capital needs and building long-term reserves necessary for preservation-oriented life cycle improvements, to constructing or acquiring new affordable housing.</li> </ul>	<ul style="list-style-type: none"> <li>• Create a preventative maintenance inspection pathway to identify and plan capital expenditures vs operation repairs, identify physical needs, and prolong the life expectancies of building mechanics, which will be monitored monthly by the property management team along with the maintenance supervisor and foreman.</li> <li>• Create, craft, and implement a digital program application.</li> <li>• Identify the physical needs of all units within the LIPH portfolio and determine a method to be used for modernization initiatives.</li> <li>• RHA Staff will review and investigate by aligning the RHA Portfolio with the City of Rockford, FY 2020-2024 Plan.</li> <li>• Identify additional flexibilities to better meet local needs and funding options to achieve long-term viability for affordable housing, while identifying new strategies that may enable RHA to provide families across the community with better-maintained housing units, while creating opportunities to leverage public and private resources, easing administration, and preserving affordable housing.</li> </ul>



**Section 7. Action Plans**

**Sub Section B. STRATEGIC ACTION STEPS FOR FINANCE AND ADMINISTRATION**

<p><b>Clients</b></p>	<ul style="list-style-type: none"> <li>• Increase, expand, and improve the overall individualized resident case management capabilities, and educational and training opportunities through the MTW Initiative, the Lifoce Development Institute, and the Jobs Plus Initiative to provide the highest, best empowerment service for our clients.</li> <li>• Boost resident collections of delinquent rents by improving internal communication flow and coordination to ensure information quality, consistency, and effectiveness whereby RHA will realize, increased revenue.</li> </ul>	<ul style="list-style-type: none"> <li>• Continued development of innovative approaches for aiding residents to achieve increased self-sufficiency by creating intentional strategic individualized empowerment by providing education, training, and instructional services to each member of the household.</li> <li>• Increase efficiency through the use of technology and digital platforms to expand tenant rent collection policies and decrease client delinquency.</li> </ul>	<ul style="list-style-type: none"> <li>• Through the Launch My Future initiative, measure the work readiness asset development and financial literacy of families and individuals through individualized case management, and annual assessments.</li> <li>• Reduce client turnover by 10% (each operating FY) as a means to develop a stronger RHA client, while also reducing RHA turnover expenses.</li> </ul>	<ul style="list-style-type: none"> <li>• Ensure Human Services staff is fully trained in Preparing Residents for Independent and Self-Sufficient living.</li> <li>• Empower RHA clients with one that is ready to "move on" at the appropriate time.</li> </ul>	<ul style="list-style-type: none"> <li>• Implement a number of communications initiatives—strengthening existing, and in some cases, developing new, resources to improve communication, and provide opportunities for resident and community engagement.</li> <li>• Implement optional online rent payment for all properties managed by RHA.</li> </ul>
<p><b>Administrations</b></p>	<ul style="list-style-type: none"> <li>• With the introduction and initiation of MTW, the RHA Admin will devise and institute alternative business procedures to achieve overall consistency and standardization.</li> <li>• Embrace our ongoing responsibility to communicate effectively with the public, residents, and constituents.</li> <li>• Working with Our Strategic Media Partner, continue to build organizational capacity, for the RHA, MTW, Brand Identity, and Branded Content Creation.</li> </ul>	<ul style="list-style-type: none"> <li>• Establish internal policies and procedures that ensure consistency, equity, and transparency for landlords and residents participating in the MTW initiative.</li> <li>• Educate, enlighten, and build local political understanding and support of the RHA brand, core values, mission, and vision.</li> <li>• Continue to change the perceptions and attitudes by the perpetuation of positive feedback in the community on social media networks, sponsored marketing, and strategic communication news outreach. Improving the RHA Corporate culture and supporting Resident Self Sufficiency goals through clear communication and interactive feedback. Advance awareness and demand around new products/services of the MTW Initiative.</li> </ul>	<ul style="list-style-type: none"> <li>• Create and establish internal tools necessary to measure the success of the MTW program initiative</li> <li>• Success will be measured and achieved when more of our community leaders and community stakeholders publicly support RHA.</li> <li>• Impact Resident, Staff, and Constituent behaviors to increase the knowledge and understanding of the public and the community. Improve overall resident educational skills through the MTW Initiative by utilizing the LaunchMyFuture.com platform.</li> </ul>	<ul style="list-style-type: none"> <li>• Promote and deploy MTW initiative to local landlords, community partners, and residents, ensuring the increase in voucher utilization, and improving lease-up timeframes, while decreasing administrative burden, and increasing staff education on policies and practices around MTW.</li> <li>• Community leaders, constituents, and community stakeholders.</li> <li>• External and internal communication and Marketing through the use of Community Relations, Public Relations, and Marketing Initiatives to position RHA over the 5 Year Strategic Plan.</li> </ul>	<ul style="list-style-type: none"> <li>• Create an additional Occupancy Specialist position to assist with administering HCV vouchers</li> <li>• Create a Landlord Liaison position to assist with the recruitment of new landlords, and additional units for existing landlords, and connect HCV voucher holders with landlords.</li> <li>• Reflect on the RHA's mission statement and core values when communicating who we are, how we work, and the vision and purpose of our work.</li> <li>• Effective community and marketing engagement and outreach through RHA Websites, Social Media Platforms, presentations, meetings, events, public notices, letters, and other communication to the public, through graphic design, photography, video, marketing and branding, and other communications-related tasks.</li> </ul>

**Section 7. Action Plans**

**Sub Section B. STRATEGIC ACTION STEPS FOR FINANCE AND ADMINISTRATION**

<p><b>Employees</b></p>	<ul style="list-style-type: none"> <li>• Improve the overall RHA corporate culture through measurable proactive communication, in formal group settings and individualized engagement to increase camaraderie and inclusion through the RHA core values.</li> </ul>	<ul style="list-style-type: none"> <li>• Move from a reactive business model to a proactive culture in the workplace, by moving toward an exemplified development of corporate flexibility, productivity, and efficiency on a daily basis.</li> </ul>	<ul style="list-style-type: none"> <li>• While culture by nature is an important intrinsic and essential value, moving toward an RHA Proactive Culture positively will affect the agency, by giving rise to a plethora of benefits, which will influence teamwork, which is an essential measurement and dimension, for boosting employee engagement, employee turnover, loyalty, and belonging.</li> </ul>	<ul style="list-style-type: none"> <li>• The RHA proactive culture will perform at 'maximum productivity and efficiency, major problems are less likely to arise, preventing the transition of minor problems into major ones, whereby, there will be measurable cost savings over the next Five Years. These Key Performance Indicators are measurable values and will demonstrate how effectively the organization is achieving its key business objectives.</li> </ul>	<ul style="list-style-type: none"> <li>• With the power to instill essential information to RHA employees in a very digestible way, The RHA Leadership Team will continue to incorporate, and improve many elements of what makes up the corporate culture such as rituals (regular learning interventions), language, symbols, and stories, which will enable employees to absorb larger volumes of knowledge in a shorter amount of time.</li> </ul>
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**Section 7. Action Plans**

**Sub Section B.1. STRATEGIC ACTION STEPS FOR FINANCE**

INITIATIVES	ACTION STEPS	OWNER	TIMELINE	STATUS
<ul style="list-style-type: none"> <li>Review the Yardi module and output on an as needed basis.</li> </ul>	<ul style="list-style-type: none"> <li>Make Yardi adjustments or additions where necessary.</li> </ul>	<ul style="list-style-type: none"> <li>Finance Director</li> </ul>	October 1, 2022	On-Going
<ul style="list-style-type: none"> <li>To increase site revenue through tenant obligation rents.</li> </ul>	<ul style="list-style-type: none"> <li>Research resources to provide one-way communication directly to the resident to allow for pre-rent due date notifications.</li> </ul>	<ul style="list-style-type: none"> <li>Finance Manager – LIPH Program Manager</li> </ul>	January 1, 2023	On-Going
<ul style="list-style-type: none"> <li>Increase opportunities and choices within opportunity areas for low-income individuals and families.</li> </ul>	<ul style="list-style-type: none"> <li>Establish a formal platform for approaching financial institutions.</li> </ul>	<ul style="list-style-type: none"> <li>CEO - Redevelopment Coordinator</li> </ul>	October 1, 2022	On-Going
<ul style="list-style-type: none"> <li>Establish a relationship with local, regional, or state financial institutions for community investment and support.</li> </ul>	<ul style="list-style-type: none"> <li>Create a 12-month Performa for all potential investment units or new construction.</li> </ul>	<ul style="list-style-type: none"> <li>CEO - Finance Director - Redevelopment Coordinator</li> </ul>	October 1, 2022	On-Going
<ul style="list-style-type: none"> <li>Market services to all municipal entities that receive HUD funding to gain visibility and credibility as a section III expert.</li> </ul>	<ul style="list-style-type: none"> <li>Create and circulate marketing materials to all public housing authorities, city governments, and municipalities, based on the marketing plan.</li> </ul>	<ul style="list-style-type: none"> <li>Section 3 coordinator - Director of Human Services</li> </ul>	October 1, 2022	On-Going
<ul style="list-style-type: none"> <li>Review the current vendor for invoice processing to determine if other billing methods can be incorporated. If necessary, research alternative available resources for automation of current purchase orders, landlord payments, and reoccurring payables, while reviewing all roles and responsibilities within the finance department, and creating instructional training videos to ensure all staff is educated on financial responsibilities and timelines.</li> </ul>	<ul style="list-style-type: none"> <li>Memorialize processes in department SOP, and review quarterly to ensure updated methodologies are documented and practiced.</li> </ul>	<ul style="list-style-type: none"> <li>Director of Finance - Finance Manager - CEO</li> </ul>	October 1, 2022	On-Going
<ul style="list-style-type: none"> <li>Adapt formalized Foundation and solicitation policies to outline the goals and intent of the Foundation and dictate how donation will be distributed or utilized.</li> </ul>	<ul style="list-style-type: none"> <li>Creation of the Foundation in the state of Illinois, and a board of trustees to govern the operations, and establish and invoke the by-laws of the Foundation.</li> </ul>	<ul style="list-style-type: none"> <li>CEO - Director of Finance - legal representative</li> </ul>	January 1, 2023	On-Going

**Section 7. Action Plans**

**Sub Section B.2. STRATEGIC ACTION STEPS FOR PARTNERS AND STAKEHOLDERS**

INITIATIVES	ACTION STEPS	OWNER	TIMELINE	STATUS
<ul style="list-style-type: none"> <li>• <b>Ensure all adult members of the household create strategic goals to improve, education, training, health, and financial status. Review financial module in YARDI.</b></li> </ul>	<ul style="list-style-type: none"> <li>• To review, renew, and create new partnerships that will support and encourage individual empowerment for independent growth and stability.</li> </ul>	<ul style="list-style-type: none"> <li>• Human Services Manager - Director of Human Services in conjunction with our strategic partners.</li> </ul>	<p>October 1, 2022</p>	<p>On-Going</p>
<ul style="list-style-type: none"> <li>• <b>To make improvements on the ongoing communication platform, and draft MOUs to outline expectations and reported results.</b></li> </ul>	<ul style="list-style-type: none"> <li>• Review current MOUs, and create an outcome reporting platform to be reviewed monthly with staff, partners, and stakeholders, to determine the efficacy of programs, policies, and procedures.</li> </ul>	<ul style="list-style-type: none"> <li>• Human Services Manager - Director of Human Services in conjunction with our strategic partners.</li> </ul>	<p>October 1, 2022</p>	<p>On-Going</p>

**Section 7. Action Plans**

**Sub Section B.3. STRATEGIC ACTION STEPS FOR PRODUCTS AND SERVICES**

INITIATIVES	ACTION STEPS	OWNER	TIMELINE	STATUS
<ul style="list-style-type: none"> <li>• Create a preventative maintenance inspection pathway to identify and plan capital expenditures vs operation repairs, identify physical needs, and prolong the life expectancies of building mechanics, which will be monitored monthly by the property management team along with the maintenance supervisor and foreman.</li> </ul>	<ul style="list-style-type: none"> <li>• Review the Yardi maintenance module to determine if a preventative maintenance module is available or research alternative software solutions to create project management, maintenance, and preventative maintenance platform.</li> </ul>	<ul style="list-style-type: none"> <li>• Maintenance Supervisor - Construction Manager- Policy Manager</li> </ul>	June 1, 2023	On-Going
<ul style="list-style-type: none"> <li>• Create, craft, and implement a digital program application.</li> </ul>	<ul style="list-style-type: none"> <li>• Review the Yardi application module/portal to enable digital applications and create an RHA app that allows user interaction and application submission.</li> </ul>	<ul style="list-style-type: none"> <li>• Maintenance Supervisor - Construction Manager- Policy Manager</li> </ul>	June 1, 2023	On-Going
<ul style="list-style-type: none"> <li>• Identify physical needs of all units within the LIPH portfolio and determine method to be used for modernization initiatives.</li> </ul>	<ul style="list-style-type: none"> <li>• Physically inspect all units within the LIPH portfolio and create a cost analysis for any perceived repairs/updates.</li> </ul>	<ul style="list-style-type: none"> <li>• Affordable Housing Manager,</li> <li>• LIPH Manager</li> <li>• Policy Manager</li> </ul>	May 1, 2023	On-Going
<ul style="list-style-type: none"> <li>• RHA Staff will review and investigate by aligning the RHA Portfolio with the City of Rockford, FY 2020-2024 Plan.</li> </ul>	<ul style="list-style-type: none"> <li>• The use of proceeds will be subject to HUD approval pursuant to leveraging amounts for securing commercial enterprises, scattered sites, or other onsite in RHA public housing developments appropriate to the goals and objectives of serving RHA clients through the Five-Year Strategic Plan.</li> </ul>	<ul style="list-style-type: none"> <li>• Redevelopment Coordinator</li> <li>• CEO</li> </ul>	May 1, 2023-2028	On-Going
<ul style="list-style-type: none"> <li>• Identify additional flexibilities to better meet local needs and funding options to achieve long-term viability for affordable housing, while identifying new strategies that may enable RHA to provide families across the community with better-maintained housing units, while creating opportunities to leverage public and private resources, easing administration, and preserving affordable housing.</li> </ul>	<ul style="list-style-type: none"> <li>• By Repositioning through disposition, RHA intends to move families from a public housing platform to other forms of HUD rental assistance, which may include Housing Choice Vouchers (HCV), Project-Based Vouchers (PBV), or project-based rental assistance (PBRA). This change can help RHA preserve quality affordable housing units, address rehabilitation and physical needs, and place RHA properties on a more stable financial foundation.</li> </ul>	<ul style="list-style-type: none"> <li>• Redevelopment Coordinator</li> <li>• CEO</li> </ul>	May 1, 2023-2028	On-Going

**Section 7. Action Plans**

**Sub Section B.4. STRATEGIC ACTION STEPS FOR CLIENTS**

INITIATIVES	ACTION STEPS	OWNER	TIMELINE	STATUS
<ul style="list-style-type: none"> <li>Implement a number of communications initiatives—strengthening existing, and in some cases, developing new, resources to improve communication and provide opportunities for resident and community engagement.</li> </ul>	<ul style="list-style-type: none"> <li>Through Section 3, The MTW Initiative, and the Job Plus Initiative provide incentives to Individuals and families with children where the head of household is working, is seeking work, or is preparing for work by participating in job training, educational programs, or programs that assist people in Job readiness and to obtain employment and become economically self-sufficiency.</li> </ul>	<ul style="list-style-type: none"> <li>Human Services Manager - Director of Human Services in conjunction with our strategic partners.</li> </ul>	<p>October 1, 2022</p>	<p>On-Going</p>
<ul style="list-style-type: none"> <li>Implement optional online rent payment for all properties managed by RHA.</li> </ul>	<ul style="list-style-type: none"> <li>Review and revise any changes made to the admissions policies, organization of the waiting list, and/or tenant rent payments.</li> <li>Update to a user-friendly RHA Residents Handbook and non-print media that will support learning, and testing, which contains updated information, advice, and resources for prospective and current residents. Topics include what to know before signing a lease, Resident responsibilities and policies, Safety information, Emergency procedures, Public Housing eligibility and income reporting, and Resident rights.</li> </ul>	<ul style="list-style-type: none"> <li>LIPH Program Manager</li> <li>Finance Manager</li> <li>Policy Manager</li> </ul>	<p>October 1, 2024</p>	<p>On-Going</p>

**Section 7. Action Plans**

**Sub Section B.4. STRATEGIC ACTION STEPS FOR CLIENTS**

INITIATIVES	ACTION STEPS	OWNER	TIMELINE	STATUS
<ul style="list-style-type: none"> <li>• Create an additional Occupancy Specialist position to assist with administering HCV vouchers.</li> <li>• Create a Landlord Liaison position to assist with recruitment of new landlords, additional units for existing landlords, and connect HCV voucher holders with landlords.</li> </ul>	<ul style="list-style-type: none"> <li>• Create a job description and hire a Landlord Liaison.</li> <li>• Hire an Occupancy Specialist to assist with additional voucher administration.</li> <li>• Updated Standard Operating Procedures to include MTW initiative.</li> </ul>	<ul style="list-style-type: none"> <li>• HCV Program Manager Policy Manager LIPH Program Manager</li> </ul>	<p>January 1, 2023</p>	<p>On-Going</p>
<ul style="list-style-type: none"> <li>• Reflect the RHA's mission statement and core values when communicating who we are, how we work, and the vision and purpose of our work.</li> </ul>	<ul style="list-style-type: none"> <li>• Provide timely, accurate, and complete information to the publics in which we serve, and within the RHA organization.</li> <li>• Continue to standardize the form and appearance of the RHA branded content communication to ensure that the community recognizes information originating from RHA.</li> <li>• Deliver consistent and helpful messages about, and include the benefits of, our services that RHA renders.</li> <li>• Ensure frequent opportunity for meaningful community and resident engagement</li> <li>• Maximize our resources and plan ahead to always ensure information reaches the appropriate audiences on an ongoing and frequent basis.</li> </ul>	<ul style="list-style-type: none"> <li>• RHA CEO, and RHA Media Liaison</li> </ul>	<p>January 1, 2023</p>	<p>On-Going</p>
<ul style="list-style-type: none"> <li>• For effective community and marketing engagement and outreach through RHA Websites, Social Media Platforms, presentations, meetings, events, public notices, letters, and other communication to the public, through graphic design, photography, video, marketing and branding, and other communications-related tasks.</li> </ul>	<ul style="list-style-type: none"> <li>• Maintain websites, social media accounts, RHA Digital TV Channel, Newsletters, e-mail blasts, create and produce Filmed Presentations and other marketing initiatives to continue the positioning of RHA in the community as a leader in providing affordable housing to low-income residents and the support services they need.</li> </ul>	<ul style="list-style-type: none"> <li>• RHA CEO Media Partner</li> </ul>	<p>January 1, 2023-2028</p>	<p>On-Going</p>

**Section 7. Action Plans**

**Sub Section B.4. STRATEGIC ACTION STEPS FOR CLIENTS**

INITIATIVES	ACTION STEPS	OWNER	TIMELINE	STATUS
<ul style="list-style-type: none"> <li>With the power to instill essential information to RHA employees in a very digestible way, The RHA Leadership Team will continue to incorporate, and improve many elements of what makes up the corporate culture such as rituals (regular learning interventions), language, symbols, and stories, which will enable employees to absorb larger volumes of knowledge in a shorter amount of time.</li> </ul>	<p>RHA Team leaders must decide what the agency's work culture is and will essentially 'hold the reins to the attitudes of employees and the realization of the RHA's business goals which is unique and is the sum total of RHA's values, traditions, beliefs, interactions, behaviors, and attitudes.</p>	<ul style="list-style-type: none"> <li>CEO Director of Finance Director of Human Services</li> </ul>	<p>January 1, 2023-2028</p>	<p>On-Going</p>



**Sub Section C. to assess the quality of performance.**

**KEY PERFORMANCE INDICATORS (KPI)**

Key Performance Indicators (KPI) are financial and non-financial metrics used to quantify objectives to reflect the performance of an organization. KPI's are used in an Agency to assess the present state of the Housing Authority and to prescribe a course of action moving toward the future. The act of monitoring KPI's are frequently used to "value" difficult-to-measure activities such as the benefits of leadership development, service, and satisfaction.

Key performance indicators (KPIs) refer to a set of quantifiable measurements used to gauge an Agency's overall long-term performance. KPIs specifically help determine an organization's strategic, financial, and operational achievements, especially compared to those of other PHAS within the same sector of the marketplace



*In Public Housing Authorities, KPI's are typically used to monitor the performance of the housing authority staff on a set of metrics defined by HUD. The PHAS monitor a set of KPI's for Public Housing. For example, Key Performance Indicators (KPI) are used to assess the management of the HCV, formerly called the Section 8 program.*

*Most Key Performance Indicators (KPIs) fall into one of the following four categories: Revenue improvement, cost reduction, process cycle-time improvement and increased resident satisfaction.*

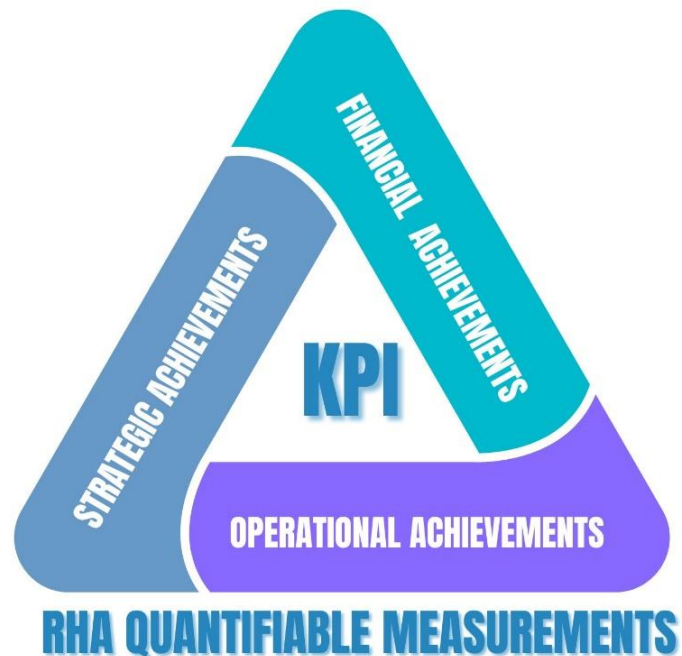
*These tangible and intangible KPIs listed above will evaluate the success of the organization or of a particular activity (such as listed projects, programs, products, and other initiatives) in which RHA engages.*

RHA will use these metrics to track and analyze factors deemed crucial to the success of the organization. These KPIs focus on the business processes and functions that senior management sees as most important for measuring progress toward meeting strategic goals and performance targets.

### Progress Indicators

The level of progress in attaining RHA strategic objectives for this plan will be determined through a combination of three factors:

1. **Comparison between the timeline expectations**
2. **Measurement and observation: how does the capacity and capabilities affect outcome**
3. **Feedback from staff, board, stakeholders, residents and community partners.**



## Section 8. Conclusion

### "Moving Forward Together"

With newly designated areas of concentration, the RHA staff once again was asked to review the '*state of the organization*' that would align the goals and objectives for the next Five Years, 2023 - 2028. The strategic planning process ensured everyone was informed and knew where the organization stood in all six areas. The summary of the information is as follows:

To implement the "**Moving Forward Together**" Strategic Plan, RHA assigned key resources in the roles of managers to strategic initiatives. Team leaders at the Agency who are responsible for guiding, mentoring, and overseeing the achievement of strategic initiatives. These are employees who have demonstrated aptitude and commitment to scope, drive, achievement, and will deliver a completed strategic initiative. The RHA Executive Team will work with staff and a cross functional team of employees to accomplish their strategic initiatives.

These RHA strategies recommended by the Strategic Plan Committee are included and may span one to Five Years for successful implementation. The strategy execution process in the previous pages defines

what needs to be done, by whom and by when. Finally, the targets for each Goal will be reviewed and refreshed as needed, and the Strategies will be continually tracked, reported, and refreshed annually as needed.

**Methodology:**

The Five Year Plan, which each PHA submits to HUD once every 5th PHA fiscal year, and the Annual Plan are the best practices presented in the RHA "**Moving Forward Together**" strategic plan. The Plan becomes a comprehensive guide for policies, programs, operations, and strategies for meeting local housing needs and goals. The Plan has been collected through research on resident education trends and best practices, focusing on the impact of housing facilities, and on improving scattered site outcomes. In addition, the research includes best practices for facilities management across industries, focusing on PHAS that build, maintain and operate a large number of facilities. PHAS around the country are deeply concerned about the cost of housing and the ability of residents to afford living in their cities, towns, and states. They know what a profound effect the issue of housing affordability can have on the life of the communities they serve. The Plan ensures equal opportunity and affirmatively further fair housing by undertaking affirmative measures to ensure access to assisted housing regardless of race, color, religion, national origin, sex, age, familial status, and disability. In addition, HUD regulations provide for additional protections regarding sexual orientation, gender identity, and marital status. While the emphasis in The RHA Plan will be on current and future engagement in the **Move To Work Initiative**, RHA will continue to advance the understanding for and access to equity and finance opportunities that aid in advancing the repositioning of RHA properties.

RHA intends to accomplish the following tangible goals through Four Focus Areas for the "Moving Forward Together" Plan: **Build, Serve, Partner and Engage**.

**BUILD** TRUST ACROSS THE SECTORS AND BUILD UNDERSTANDING OF RESIDENT AND COMMUNITY MEMBERS AT LARGE.

ENSURE **PARTNERSHIP** WITH GOOD PRACTICE AND EFFECTIVENESS,  
**SERVE** THE RESIDENTS WITH THE HIGHEST BEST GOOD AT ALL TIMES AND  
**ENGAGE** BY CONTINUING TO SUPPORT THROUGH COMMUNICATION,  
EMPOWERMENT AND ENABLEMENT.

## Section 9. Public Housing Acronyms

ACOP.....	Admissions and Continued Occupancy Policy
AMP.....	Asset Management Properties
CEO.....	Chief Executive Officer
FSS.....	Family Self Sufficiency
HCV.....	Housing Choice Vouchers
HQS.....	Housing Quality Standards
HUD.....	United States Department of Housing and Urban Development
KPI.....	Key Performance Indicators
LDI.....	Lifeforce Development Institute
LIPH.....	Low Income Public Housing
LMF.....	Launch My Future
MI.....	Mixed Income
MTW.....	Move To Work
PH.....	Public Housing
PHAS.....	Public Housing Assessment System
REAC.....	Real Estate Assessment Center
RHA.....	Rockford Housing Authority
RP.....	Resident Programs
S8.....	Section 8
SEMAP.....	Section 8 Management Assessment Program
SOP.....	Standard Operating Procedure
SWOT.....	Strength, Weakness, Opportunity and Threat Analysis
Yardi.....	Property Management Software