



# Strategic Plan

2014-2016+

## *Top Four Priorities*

Increase opportunities for affordable housing

Stabilize revenue base to support mission

Align organization to meet strategic goals

Enhance relationships with stakeholders

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January 23, 2013

## Welcome from the Executive Director

Greetings,

In February of 2013, I became the Executive Director of Westbrook Housing. Upon my joining the organization and the talented, dedicated staff here, a long range planning team had recently been formed, and the strategic planning process had begun. I embraced the project wholeheartedly.

Today I am pleased to present this plan, the result of months of hard work and study of a dedicated team of leadership and staff from all parts of the Agency. I am excited not only with what the team has accomplished, but at the prospect of seeing us move toward and achieve these goals over the coming years as we work to fulfill our mission.

I am certain the things we accomplish as we carry out our plan will have a positive effect and be of great benefit to those we serve, to our staff, and to the community of Greater Westbrook. I invite you to review our plan, embrace our role and our mission, and work together with us toward our vision of the future of Westbrook Housing.

Sincerely,

A handwritten signature in black ink, appearing to read "Chris LaRoche", written in a cursive style.

Christopher J. LaRoche



**TABLE OF CONTENTS**

Mission ..... 3

Vision..... 3

Plan overview ..... 4

Process ..... 4

About Westbrook Housing ..... 5

Boards ..... 5

    Board of Commissioners, Westbrook Housing.....5

    Board of Directors, Westbrook Development Corporation .....5

Strategic Planning Team ..... 5

Strategic Direction - Goal 1: *Build on Westbrook Housing’s reputation to increase opportunities for affordable housing in Greater Westbrook through portfolio development.* ..... 6

Strategic Direction - Goal 2: *Stabilize and grow overall funding base to support our mission.* ..... 7

Strategic Direction - Goal 3: *Ensure key components of our organizational structure are aligned and optimized to meet strategic goals.* ..... 8

Strategic Direction - Goal 4: *Enhance relationships with stakeholders to grow public awareness, improve marketing, build image and community connections.* ..... 9

Executing the Plan ..... 10

    Next Steps ..... 10

**Terminology:**

**Strategic Directions** – Define, at the highest level, our priorities. These are our “big picture” goals; the outcomes for which we will strive as an organization.

**Strategies** – Are the specific areas we will address and methods we will use to achieve our goals.

**Accountabilities** – Set forth the functional areas within our Agency that are responsible for turning strategies into reality.

## MISSION

Westbrook Housing provides opportunities for affordable quality housing to assist individuals and families and to encourage independence within a supportive community.

## VISION

We envision a Westbrook Housing where ...

- The supply of housing in the greater Westbrook area is sufficient for the demand, and our residents and voucher holders are stable, informed and receiving needed services.
- In our area, landlords readily accept housing choice vouchers, subsidized housing carries no stigma, and is seen as transitional assistance for many, rather than an entitlement.
- Our excellent reputation as a provider of quality affordable housing causes other organizations to seek us out for collaborative ventures and partnerships.
- We maintain a strong relationship with civic and community leaders, and are respected as equals by our investment partners.
- Our vibrant and supportive Board readily engages with our well trained staff.
- We are viewed in the community as having a significant economic impact.
- We are seen as a model housing provider for New England.

## PLAN OVERVIEW

Westbrook Housing has a reputation for quality affordable housing. However, faced with significant uncertainty around funding sources, evolving demographic trends, economic impacts stemming from major area employers going through changes, and transition in our own leadership, we felt a solid strategic plan was critically important to not only ensure long term stability, but also ensure that there was clarity around the agency's mission, and that the organization was performing effectively.

Accordingly, the goal of this project was to develop a three year strategic plan that addresses at least the following issues:

- Define the organization's mission in terms of meeting the needs of the various constituencies that the agency serves.
- Examine the board-staff and intra-staff organizational dynamics and help optimize the agency's performance in the delivery of services.
- Ensure that the organization is on sound financial footing from a diversification standpoint, and able to respond to changing funding landscapes nimbly and effectively.

## PROCESS

We formed a strategic planning team consisting of both leadership and staff level personnel from all departments across the Agency to drive the process. We engaged experienced consultants to facilitate a series of sessions with our staff and board. Our facilitators interviewed each team member individually prior to working with the team as a whole through a number of sessions through the summer and fall of 2013. They also conducted a joint environmental scan session with the Board of Commissioners and the Westbrook Development Corporation Board of Directors, as well as obtaining input on Agency goals from the two Boards.

We used an hourglass approach to develop the plan, working from the broadest information gathering and environmental scan perspectives first, then narrowing to a more traditional analysis of strengths, weaknesses, opportunities and threats, before setting strategic direction and identifying specific goals for the planning horizon. We then expanded upon and refined each of the goals through the identification of actionable strategies designed to result in goal achievement.

Finally, we identified responsible parties within the Agency to lead the strategic initiatives set forth in the plan, and worked through resource allocation to ensure effective execution throughout the planning period.

The plan is our road map. This document highlights for our stakeholders where we're going and how and when we'll get there.

## ABOUT WESTBROOK HOUSING

Westbrook Housing has been the public housing authority for the City of Westbrook since 1969. In addition to serving lower income families and senior and/or disabled citizens, we develop properties in support of our mission, throughout greater Westbrook and Cumberland County, via our wholly owned subsidiary, Westbrook Development Corporation. We provide 481 apartments to a wide variety of seniors and disabled individuals and families, as well as over 800 Housing Choice Vouchers, 175 of which are designated for the disabled community.

## BOARDS

### Board of Commissioners, Westbrook Housing

- Stacy Symbol, *Chair*
- Thomas Perrey, *Vice Chair*
- Lewis Emery
- Dr. Marc Gousse
- Evelyn Orman
- Crystal Sands
- Gertrude Zimmerman

### Board of Directors, Westbrook Development Corporation

- Betsy Sawyer-Manter, *Chair*
- Kyra Walker, *Vice Chair*
- Thomas Bartell
- René Daniel
- Lewis Emery
- Dr. Marc Gousse
- Dan Hunter
- Stacy Symbol
- Darryl Wright

## STRATEGIC PLANNING TEAM

- Christopher LaRoche, *Executive Director*
- Brian Bishop, *Maintenance II, Chair*
- Dick Begin, *Sr. Program Officer – Development*
- Tami Exchange, *Sr. Property Mgr.*
- Andy Bulger, *Maintenance & Construction Superintendent*
- Pawel Pietrzak, *Finance Director*
- Susan Eldridge, *Deputy Director*
- Lynn Peterson, *Sr. Program Officer – HCV Division*
- Michelle York, *Supportive Services Coordinator*
- Todd West, *HR Generalist*
- Nicole Ingalls, *Program Officer*
- Nikki Nappi, *Activities Coordinator*

We would like to thank the Board members and staff who contributed to the development of this plan. We are also grateful for the assistance of our advisors, Mike Stair and Sandy Bonney of Laser Focus Coaching, who facilitated the project and assisted with the production of the plan.

## **Strategic Direction - Goal 1:** *Build on Westbrook Housing’s reputation to increase opportunities for affordable housing in Greater Westbrook through portfolio development.*

### Context

There is a continuing need for affordable housing in the Greater Westbrook community. The number of eligible applicants who seek housing assistance is greater than the number we can help. Still, in times of declining government support, we remain committed to our mission. This commitment requires us to both preserve and increase our current housing inventory through measured, targeted development, as well as to address changing demographic trends by tailoring our development efforts to meet the future housing needs of our constituencies.

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- **Strategy 1A:** Perform needs assessment for supply of housing; Work with regional partners and stakeholders as appropriate to identify areas of projected demand (i.e. student housing, market rate, young families, mixed use, senior, or other as identified in needs assessment)
- **Strategy 1B:** Identify property for development in keeping with needs assessment; Finance and develop projects in accordance with plan and Board approvals, with development proceeds to be used
  - as seed money for other development activities; and,
  - to create cash flow to support agency operational activities
- **Strategy 1C:** Update capital/facilities improvement plan, then maintain and update current housing stock in keeping with plan



## **Strategic Direction - Goal 2: *Stabilize and grow overall funding base to support our mission.***

### Context

Reliance on limited primary funding sources has the potential to be our Achilles' heel. This is an even greater concern in light of recent, and expected continuing, funding cuts. To support our mission in a sustainable manner, we must diversify our revenue sources. Developing revenue streams outside our current financial base requires creativity. Additionally, we must know our own costs and maximize our efficiencies wherever possible.

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- **Strategy 2A:** Institute production based accountability and decision making across cost/profit centers through department leadership, measured by revenue
- **Strategy 2B:** Create a resource development plan to diversify agency funding away from high dependence on government sources
- **Strategy 2C:** Market housing development and management skills to nonprofit and for profit partners; look for ways to turn expense centers into profit centers
- **Strategy 2D:** Explore opportunities for regionalization of services





## **Strategic Direction - Goal 3:** *Ensure key components of our organizational structure are aligned and optimized to meet strategic goals.*

### Context

One of the key outcomes of the planning process was the observation of a strong need for a comprehensive Agency succession plan. A strength of the Leadership Team is seen in the overall longevity of tenure of its members. However, this is potentially a weakness as well, as several staff are nearing retirement age and multiple departures of key team members within a short period of time would cause significant hardship. Further, a number of junior staff expressed frustration at the lack of advancement opportunity. Other key areas included under this goal include infrastructure review, Board member training and overall organizational structure in light of evolving demographic trends.

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- **Strategy 3A:** Develop long range plan to include Executive Director's review of all cost centers and evaluation of infrastructure/personnel resources with goal of maximizing effectiveness while developing lean operational efficiency
  
- **Strategy 3B:** Formalize initial and ongoing Board training to enhance Board effectiveness
  
- **Strategy 3C:** Develop and implement succession plan, considering such items as
  - Inter and intra departmental cross training
  - Development of managers through establishing needs, expectations, and performance measures
  - Adjustment of job descriptions to promote ownership and accountability
  - Development of equitable pay scales for positions
  - Staff recruitment/development/retention measures
  
- **Strategy 3D:** Evaluate demographic trends through appropriate research and position organization accordingly via adjustment of staffing plans and job descriptions

## **Strategic Direction - Goal 4: *Enhance relationships with stakeholders to grow public awareness, improve marketing, build image and community connections.***

### Context

Although the Agency is known within Maine's public housing community for providing quality affordable housing, a variety of key stakeholders are not as well informed about the organization and its capabilities. These audiences may include, but are likely not limited to, the public at large, community partners, other agencies, the City of Westbrook, and even many of our own residents and landlords.

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- **Strategy 4A: Improve communication with residents**
  - Survey residents to identify optimal method, frequency and desired content of communication
  - Educate residents on existing Agency communications
  - Based on survey results, build and implement a communication plan, potentially to use such methods as Presidents' meetings, Resident Councils, social media, website, email/phone blasts or other tools as appropriate
  
- **Strategy 4B: Increase collaboration with community partners**, including immersion with other agencies – solicit business, grow from opportunities, establish partnerships, give & take with each other's needs
  - Expand use of our facilities for community partners (satellite offices, conference rooms, community rooms) in keeping with agency policies
  - Establish new working relationships with neighboring communities as development partners
  - Strengthen economic and development connections with City of Westbrook
  
- **Strategy 4C: Continue to market and increase visibility in the community**
  - Establish, fund and implement comprehensive marketing plan

# EXECUTING THE PLAN

## Next Steps

The plan has been designed with specific accountabilities and timelines in order to support implementation and monitoring of progress against completion.

To ensure successful progress, and to capture changing environmental and internal factors that may influence various components of the plan, it is important to revisit the document frequently, not less than semi-annually. Rolling plan updates are helpful, with completed items removed and changes to the goals, strategies and accountabilities recorded on an updated timeline as appropriate.

The plan should be a living document kept close at hand to provide guidance in ongoing decision making. Strategic planning is an ongoing process, not a one-time event.

