2023 – 2027 STRATEGIC PLAN

38

WASHINGTON COUNTY Community Development Agency

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September 30, 2022

RE: Washington County CDA 2023-2027 Strategic Plan

To our Community Partners,

I am pleased to present to you the Washington County Community Development Agency 2023-2027 Strategic Plan. It provides a multi-year blueprint to frame our market and stay focused on priorities responsive to the needs of Washington County.

The Washington County CDA sees the benefits of defining the foundations of our work and having a shared vision of the future. This five-year plan lays out the current environment and our plans for how we will build a successful future for our residents and businesses to ultimately meet our mission:

"To improve the lives of Washington County residents by providing access to affordable housing and supporting community and economic development in local municipalities."

Thank you to staff and leaders from Washington County, its municipalities, and other community partners that thoughtfully contributed to the development of this plan. When we bring our community together to build relationships, celebrate our collaborations, and honor people, we build positive momentum that can help us accomplish our goals.

I hope you'll partner with us to strengthen and increase the impact we have on our community. It's one more step in fostering a vibrant, prosperous, and growing County through extraordinary community development.

Sincerely,

Roger Green Chair, Washington County CDA Board of Commissioners

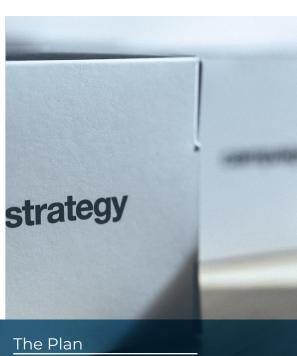
EXECUTIVE SUMMARY

From February 2022 through May 2022, the Washington County CDA engaged in a strategic planning process. The process resulted in a strategic plan covering 2023-2027.

The plan consists of five **strategic priorities** — the issues of greatest importance to the Washington County CDA over the next five years. Associated with each priority is a set of **desired outcomes**, **key outcome indicators**, and **performance targets**, describing expected results and how the results will be measured. The plan also includes **strategic initiatives** that will be undertaken to achieve the targeted outcomes.

The planning effort began with an examination of the operating environment, Board interviews, Environmental Scan, Focus Groups, and a SWOT analysis. On May 5, 2022, the Board and senior management team held a day long strategic planning session where they established strategic direction, and confirmed the organization's vision, mission, and values.

Based upon that direction, the senior management team met on May 17, 2022 to identify a set of strategic initiatives and develop detailed action plans. The strategic priorities, key outcome indicators, performance targets and strategic initiatives are summarized here and on the following page.



The Plan Five Strategic Priorities

- FINANCIAL FLEXIBILITY
- 2 ECONOMIC VITALITY
- **3** EMPATHETIC, INTENTIONAL SERVICE
- 4 EXPANDED HOUSING OPPORTUNITIES
- 5 COMMUNITY PARTNERSHIPS

STRATEGIC PLAN SUMMARY 2023–2027 Washington County Community Development Agency

Strategic	Desired	Key Outcome	Target	Strategic
Priority	Outcome	Indicator	3	Initiatives
FINANCIAL FLEXIBILITY "Sustaining a financially agile organization"	Expanded revenue from non-traditional sources Fully funded and maintained capital assets	- # of new sources % of CIP funded - CIP debt issued - # projects completed	- 3 new revenue sources by 2027 - Fully fund CIP by 2025 - >90% of planned CIP projects completed yearly	a) Integrated CIP funding and implementation strategy b) Revenue expansion
	Local funds reflect strategic priorities	- Maximization of CDA funds	- Fully funded annual budget	c) Develop strategy to deploy local resources
ECONOMIC VITALITY "Supporting an economically vibrant County"	County workforce needs are supported	% of survey results - Workforce gaps addressed	- >75% of partners say CDA is a valued contributor to achieving workforce outcomes	 a) Develop County-wide talent capacity strategy b) Evaluate collaborations w/ workforce
	Business expansion support	 Technical assistance delivered Identified needs met 	 125 businesses/yr. receive technical assistance >65% of identified business needs met 	c) Develop comprehensive business support program
	County-wide opportunity site support	# of dollars deployed# sites supported	- \$200,000/year deployed - Min. of four sites/year supported	d) Expand programming for future site preparation
EMPATHETIC, INTENTIONAL SERVICE "Understanding an individual's experience to guide our actions"	Diverse organization fostering inclusive culture	 Diversity hiring goals met Survey results confirm inclusive culture 	 Diversity hiring goals met by 2027 >85% surveyed confirm inclusive culture 	a) Align DEI training w/ outcomes
	An organization that demonstrates empathy	- Survey results confirm empathic service	 >75% surveyed indicate staff and close partners demonstrate empathy in service interactions 	 b) Develop comprehensive customer service standards
	Program delivery that reflects intentionality	 % of programs meet standard % satisfied clients 	 All programs meet intentionality standards by 2027 >75% client satisfaction 	c) Develop and implement customer service training
EXPANDED HOUSING OPPORTUNITIES "Addressing the County's affordable housing needs"	Expanded supply of affordable housing	- # rental units at <60% AMI - # owned units at <80% AMI	By 2027, meet unit targets for: units at 30%-60% AMI; units at <50% AMI; rental units at <30% AMI; income-based rental units; owned units at <80% AMI	 a) Create strategy to increase deeply affordable housing b) Develop a land banking strategy
	Increased land supply for affordable housing	- # affordable sites owned	- 1 site purchased for 50 or more affordable housing units by 2027	c) Create a strategy to reduce homeownership disparity
	Increased access to affordable housing	- Increase in availability of units targeted to historically underserved populations	By 2027, achieve targets for: landlord participation; new special needs units; homebuying program utilization by persons of color; homelessness set aside units	 d) Develop an affordable housing preservation plan e) Implement a landlord engagement plan
	Preserve affordability of existing housing	-Net change in # of currently affordable units -# of homes rehabilitated	 - <5% loss of currently affordable housing - 10% increase in home improvement loans 	
COMMUNITY PARTNERSHIPS "Collaborating to increase our impact"	Positive partner relationships	 Positive Survey results # of City presentations Lack of opposition to proposals 	 >80% partners & City staff confirm positive working relationship >90% of affordable housing land use proposals approved by City Councils 	 a) Develop partner surveys b) Develop a legislative advocacy agenda c) Create a partner
	Increased community awareness	- # success stories shared - # partner contacts - Increase in program inquiries	- 10% increase in phone inquiries and website hits 2022-2027 - - 5 new partnerships formed	collaboration strategy d) Implement cohesive communications plan

OUR VISION

To foster a vibrant, prosperous and growing County through extraordinary community development.

OUR MISSION

Our mission is to improve the lives of Washington County residents. We do this by providing access to affordable housing and supporting community and economic development in local municipalities.

OUR VALUES

EMPATHY

We recognize, understand, and respond to the feelings and circumstances of others.

PASSION We find purpose and joy in our work.

INTEGRITY We act with honesty, impartiality, and respect for all.

COLLABORATION

We learn from others and work together to achieve excellence.

STEWARDSHIP

We responsibly and efficiently use the resources entrusted to us.

Reviewing the Environment, Setting Strategic Priorities

An important part of the strategic planning process is a review of the current operating environment and an evaluation of the challenges confronting the organization. This was accomplished via a SWOT analysis--a process that examines the organization's internal strengths and weaknesses, as well as the opportunities and threats in the external environment. The results are displayed below.



STRATEGIC PRIORITY 1 Financial Flexibility



OUTCOME

Expanded revenue from non-traditional sources

KEY OUTCOME INDICATOR # of new sources

TARGET 3 new revenue sources by 2027

OUTCOME

Fully funded and maintained capital assets

KEY OUTCOME INDICATOR __% of CIP funded, CIP debt issued, # projects completed

TARGET Fully fund CIP by 2025 >90% of planned CIP projects completed yearly

OUTCOME

Local funds reflect strategic priorities

KEY OUTCOME INDICATOR Maximization of CDA funds

TARGET Fully funded annual budget

STRATEGIC INITIATIVES

- a. Integrated CIP funding and implementation strategy
- b. Revenue expansion strategy

c. Develop strategy to deploy local resources

STRATEGIC PRIORITY 2 Economic Vitality



OUTCOME

County workforce needs are supported

KEY OUTCOME INDICATOR

__% of survey results, workforce gaps addressed

TARGET

>75% of partners say CDA is valued contributor to achieving workforce outcomes

OUTCOME

Business expansion support

KEY OUTCOME INDICATOR

Technical assistance delivered, identified needs met

TARGET 125 businesses/yr. receive technical assistance >65% of identified business needs met

OUTCOME

County-wide opportunity site support

KEY OUTCOME INDICATOR # of dollars deployed, # sites supported

TARGET \$200,000/year deployed Minimum of four sites/year supported

STRATEGIC INITIATIVES

a. Develop County-wide talent capacity strategy

b. Evaluate collaborations with workforce

c. Develop comprehensive business support program

d. Expand programming for future site preparation

STRATEGIC PRIORITY 3 Empathetic, Intentional Service



OUTCOME

OUTCOME

empathy

Diverse organization fostering inclusive culture

An organization that demonstrates

KEY OUTCOME INDICATOR

Diversity hiring goals met, survey results confirm inclusive culture

TARGET

Diversity hiring goals met by 2027 >85% surveyed confirm inclusive culture

KEY OUTCOME INDICATOR Survey results confirm empathetic service

TARGET

>75% surveyed indicate staff and close partners demonstrates empathy in service interactions

OUTCOME

Program delivery that reflects intentionality

KEY OUTCOME INDICATOR

__% of programs meet standard, __% satisfied clients

TARGET

All programs meet intentionality standards by 2027 >75% client satisfaction

STRATEGIC INITIATIVES

a. Align DEI training with outcomes

b. Develop comprehensive customer service standards

c. Develop and implement customer service training

STRATEGIC PRIORITY 4 Expanded Housing Opportunities



OUTCOME

Expanded supply of affordable housing

OUTCOME

Increased land supply for affordable housing

OUTCOME

Increased access to affordable housing

OUTCOME

Preserve affordability of existing housing

KEY OUTCOME INDICATOR

of rental units at <60% AMI, # owned units at <80% AMI

TARGET

By 2027, meet unit targets for:

- units at 30%-60% AMI
- units at <50% AMI
- rental units at <30% AMI - income-based rental units
- income-based rental units - owned units at <80% AMI
- Owned units at <80% AMI

KEY OUTCOME INDICATOR

affordable sites owned

TARGET

1 site purchased for 50 or more affordable housing units by 2027

KEY OUTCOME INDICATOR

Increase in availability of units targeted to historically underserved populations

TARGET

By 2027, achieve targets for:

- landlord participation
- new special needs units
- homebuying program utilization by persons of color
- homelessness set aside units

KEY OUTCOME INDICATOR

Net change in currently affordable units, # of homes rehabilitated

TARGET

<5% loss of currently affordable housing 10% increase in home improvement loans

STRATEGIC INITIATIVES

a. Create a strategy to increase deeply affordable housing

b. Develop a land banking strategy

c. Create a strategy to reduce homeownership disparity

d. Develop an affordable housing preservation plan

e. Implement a landlord engagement plan

STRATEGIC PRIORITY 5 Community Partnerships



OUTCOME

Positive partner relationships

KEY OUTCOME INDICATOR

Positive survey results, # of City presentations, lack of opposition to proposals

TARGET

>80% partners & City staff confirm positive working relationship>90% of affordable housing land use proposals approved by City Councils

OUTCOME

Increased community awareness

KEY OUTCOME INDICATOR

of success stories shared, # partner contacts, increase in program inquiries

TARGET

10% increase in phone inquiries and website hits 2022-2027 5 new partnerships formed

STRATEGIC INITIATIVES

- a. Develop partner surveys
- b. Develop a legislative advocacy agenda
- c. Create a partner collaboration strategy
- d. Implement cohesive communications plan

STRATEGIC PLANNING PARTICIPANTS

The strategic plan was developed with the hard work and dedication of many individuals. The Board led the way, taking time out their schedules to commit to long-term thinking. They defined a direction and a set of outcomes that are important to the citizens, businesses, and stakeholders with whom they partner and serve.

The Washington County Community Development Agency's senior staff supported the Board and offered challenges to conventional thinking.

BOARD OF COMMISSIONERS

Roger Green, Chair Steven Ryan, Vice Chair Daniel Dingle, Secretary John Belise, Member Peg Larsen, Member Fran Miron, Member/County Commissioner Temmy Olasimbo, Member Stan Karwoski, Alternate Member/County Commissioner

STAFF

Melissa Taphorn, Executive Director Aaron Christianson, Finance Director Chris Eng, Economic Development Director Ann Lindquist, Housing Assistance Director Karly Schoeman, Deputy Executive Director Alyssa Soderlund, Administration Director

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