



# Bienestar

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## Strategic Plan 2012-2015



## **Mission Statement**

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Bienestar builds housing, hope and futures for the well-being of working families and seniors.

## **Vision statement:**

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Quality affordable housing is essential for individuals, families and communities to thrive. We envision and develop communities where residents find dignity, hope, confidence, skills and courage to pursue their dreams.

Bienestar believes that all work is honorable and champions those who provide essential labor to the community. We work to unleash the potential of people to improve the quality of life for themselves, their children, their families and the community.

## Executive Summary

In the most recent Annual Review of the Strategic Plan for 2008-2011 by the Board of Directors in March, 2011 we were pleased to see that there had been significant accomplishments in the objectives and actions outlined in the plan.

As we look forward with new energy, enthusiasm and commitment to the next three years, we anticipate a challenging environment dominated by factors including:

- Continuing effects of the recession - elimination of tax credits as a viable financing option; decreased individual donations; decrease in grant funding; challenges in traditional lending sources.
- Anti-immigration sentiment creating an environment of fear and panic in the Hispanic community continues and has actually been heightened in 2011 by the expansion of E-Verify and the virulent tone of anti-immigrant sentiment having been escalated.
- Diminished demographic pool of farmworkers as a result of the recession's impact on local nurseries and farms.
- Virtual collapse of OHCS (Oregon Housing & Community Services) with the loss of their major HUD contract precipitating major restructuring and layoffs.

It is our fervent hope that some of these environmental factors change over the course of the next 3 years, but we know that we will be dealing with them at least during 2012-2013. What all this means for Bienestar as we make our strategic plan is that we must continue to develop **partnerships and collaborations** in order to continue to develop housing and provide services to our residents. It means that we must be creative and innovative in partnerships that allow us to leverage other resources that we could not get on our own. We will have to continue to operate effectively with a very small, dedicated staff who have demonstrated their ability to operate with limited resources.

## Process for Strategic Planning

1. **Staff Retreat** – a full day Staff Retreat was held offsite in April, 2011. Facilitated by Jeri Alcock of OnCourse Consulting, the day was very productive and rewarding.
2. **Board Retreat** – a full day Board retreat was held in May, 2011. Facilitated by Jeri Alcock, it provided the preliminary work for setting the new directions for the 2012-2015 strategic plan.

3. **Input from Stakeholders** – Executive Director had meetings with a number of stakeholders and supporters of Bienestar to get their thoughts and suggestions. Stakeholders interviewed included Kim Thomas from Meyer Memorial Trust, Lisa Rogers, CASA of Oregon, Sharon Nielson, The Nielson Group, Peggy Linden, Washington County Office of Community Development, Anne O'Malley, ao strategies and affairs, Rob Justus, CASH Oregon and others.

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## **Summary of Core Strategies**

The strategic plan for 2008-2011 had seven overarching elements that informed Bienestar's goals for the period. We have decided that these worked very well for us as an organizing principle and we will use them again for 2012-2015.

1. **Housing Development & Asset Management (we've added Asset Management to the new plan)**
2. **Financial:  
Sustainability/Transparency/Accountability**
3. **Resource Development**
4. **Communications & Advocacy**
5. **Resident Services Programs**
6. **Organizational Effectiveness**
7. **Board Development**

## **Detailed Core Strategies with Goals and Objectives**

### **1. Housing Development & Asset Management**

Goal: Increase the availability of quality, safe and affordable housing for farmworker and low-income working families and seniors. Maintain and improve the quality of life in the communities we develop and maintain. Continue to maintain a strong record of performance in compliance, fiscal and physical performance of the portfolio. Build solid base of asset management to anticipate plans/needs for the long term for properties in the portfolio.

### **2. Financial: Sustainability/Transparency/Accountability**

Goal: Ensure the viability and sustainability of the organization. Act as good and faithful stewards of funds of the organizations and of the property portfolio. Continue to maintain a record of clean audits and building a strong balance sheet.

### **3. Resource Development**

Goal: Assure a diversified funding base for Bienestar. Continue to develop revenue streams from developer fees, asset management fees, individual and corporate donations. Pursue grant funding possibilities from government and philanthropic foundations. Explore opportunities for the development of social enterprise operations that could generate revenue.

### **4. Communications and Advocacy**

Goal: Continue to expand brand awareness of Bienestar, positioning it as a leader in affordable housing. Participate as a county leader in stakeholder groups related to affordable housing and self-sufficiency. Temper advocacy efforts by taking the lead from residents.

### **5. Resident Services Programs**

Goal: Continue to live the value that programs are an essential aspect of our housing; provide programs and services that are responsive to the critical needs of our residents, provide tools for increased economic independence for working families. Continue to place special emphasis on developing culturally appropriate programs for low-income Latino population and farmworker families. Develop specific competency in the delivery of resident service programs to new targeted populations, especially low-income seniors.

## **6. Organizational Effectiveness**

Goal: Maintain an effective, motivated and stable organization that is high-functioning and rewards performance. Engage in succession planning and building key personnel positions for the future of the organization. Continue to use professional volunteer programs to augment staff capacity. Continue to develop strong volunteer base with groups and individuals. Recruit and support staff development so that we can continue to offer a unique cultural competency in service to Latinos and farmworkers with a strong bilingual/bicultural staff to assure cultural responsiveness. As we move toward serving low-income seniors, augment staff with personnel with gerontological experience.

## **7. Board Development**

Goal: Develop and maintain a strong, active, informed and contributing Board of Directors whose governance and support help Bienestar achieve its mission.

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# **1. Housing Development & Asset Management**

**Goal: Increase the availability of quality, safe and affordable housing for low- and moderate income working families and seniors. Maintain and improve the quality of life in the communities we develop and maintain. Continue to maintain a strong record of performance in compliance, fiscal and physical performance of the portfolio.**

### **Objectives:**

- 1.1. Continue to seek additional viable new development project acquisition opportunities for construction, rehabilitation.
- 1.2. Complete construction and lease-up of Juniper Gardens, 24 unit farmworker project in Forest Grove by 2013.
- 1.3. Pursue sources of funding for Juniper Gardens Phase II, 20 units of farmworker housing in Forest Grove.
- 1.4. Pursue site acquisition for Benessere Village, 59 – 77 units of affordable housing for low-income seniors. Identify potential funding sources for land acquisition, construction and permanent financing.

- 1.5. Complete OHCS-funded Capacity Building project in 2012 including complete portfolio review, development of solid foundation of asset management department, identify funding sources to support at least part-time Housing Director/Asset Manager position.
- 1.6. Complete and utilize 20 year asset management modeling tool to anticipate capital, reserve, refinance, restructure, cash flow for non RD properties in the portfolio.
- 1.7. Continue to participate as housing partner in Bridges to Housing Program in Washington County.
- 1.8. Reach judgement/settlement in construction defect litigation for Jose Arciga Apartments.
- 1.9. Restore Sycamore View to 100% farmworker occupancy given the expiration of the occupancy waiver.
- 1.10. With the diminished financing resources available in the marketplace, continue to explore new and innovative structuring for development deals, including the use of SNAP bonds, PRIs (Program Related Investments), and joint ventures.
- 1.11. Maintain Tier I CHDO (Community Housing Development Organization) status as certified by Washington County under HUD regulations.
- 1.12. Continue to provide close and effective oversight of third party property management contract with monthly meetings and regular communications plus annual performance review.
- 1.13. Continue learning and development of practices of green building and energy conserving measures in the operation of properties.

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## **2. Financial: Sustainability/Transparency/Accountability**

**Goal: Ensure the viability and sustainability of the organization. Act as good and faithful stewards of the funds of the organization and the property portfolio.**

**Objectives:**

- 2.1 Ensure timely completion of annual audits. Ensure audits without findings.
- 2.2 Work in conjunction with accountant to provide accurate and timely financial data to the Board of Directors.

- 2.2 Continue to refine financial processes and procedures of the organization.
  - 2.4 Assure compliance with all local, state, federal reporting requirements.
  - 2.5 Continue to Increase capacity of in-house bookkeeping functions, including annual audit prep, conversion of monthly property financial statements from cash to accrual, monthly allocations for programs. In-house capacity has expanded to also include some HR functions, including benefits management and payroll prep.
  - 2.6 Continue weekly staff review and monthly Finance Committee review of cash flow projections for organization to anticipate and prepare for changes in financial status.
  - 2.7 Continue to refine monthly/annual financial reports submitted to Board, including development of Dashboard Report.
  - 2.8 Conduct annual review of organization and property insurance coverage to be sure that it is adequate.
  - 2.9 Continue active engagement of Board Treasurer, Finance Committee and Audit Committee.
  - 2.10 Review refinancing options for properties, annual budget reviews and rent increases to optimize net operating income while keeping rents affordable.
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### **3. Resource Development**

**Goal:** Assure a diversified funding base for Bienestar. Continue to develop revenue streams from developer fees, asset management fees, individual and corporate donations. Pursue grant funding possibilities from government and philanthropic foundations. Explore opportunities for the development of social enterprise operations that could generate revenue.

- 3.1 Annually obtain 100% Board and Staff giving.
- 3.2 Continue to develop an annual fund development plan with a process for tracking outcomes.
- 3.3 Carry out an annual board-driven fundraising campaign with annual increases in the goal amounts.
- 3.4 Host successful 30<sup>th</sup> Anniversary Event in 2012 raising sponsorship funds sufficient to cover expenses with \$5000 profit.

- 3.5 Provide training for board and staff on resource development.
  - 3.6 Research and pursue viable opportunities for grants from government and philanthropic foundations for programs and operating support.
  - 3.7 Increase corporate giving in numbers of corporations and amounts.
  - 3.8 Continue to meet all grant reporting requirements and deadlines.
  - 3.9 Research potential resources, e.g. endowments, to assure sustainability of financial support for resident service programs.
  - 3.10 Identify additional revenue potential from properties through refinance, asset management fees, resident service fees, increased cash flow to access funds available 'below the line'.
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## 4. Communications and Advocacy

**Goal:** Continue to expand brand awareness of Bienestar, positioning it as a leader in affordable housing. Participate as a county leader in stakeholder groups related to affordable housing and self-sufficiency. Temper advocacy efforts by taking the lead from residents.

- 4.1 Develop regular timeline of annual communications to stakeholders to include newsletters, blast emails, and annual report.
  - 4.2 Continue to use and develop social media.
  - 4.3 Participate as member of affordable housing advocacy organizations including Oregon Opportunity Network, Housing Alliance, Housing Advocacy Group, Homeless Plan Advisory Group, Fair Housing Advisory Committee, Washington County Thrives Steering Committee, Bridges to Housing Implementation Team, Aloha-Reedville HUD Planning Committee, Westside Economic Alliance, Oregon Farmworker Housing Facilitation Workgroup, Washington County Farmworker Leaders Group, Latino Advisory Group.
  - 4.4 Continue to develop regular schedule of press releases and pursue media opportunities when appropriate. Develop inventory of personal success stories of residents to inspire others, change public perceptions of affordable housing residents.
  - 4.5 Maintain dynamic and current website that attracts visitors.
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## 5. Resident Service Programs

**Goal:** Continue to live the value that programs are an essential aspect of our housing; provide programs and services that are responsive to the critical needs of our residents, provide tools for increased economic independence for working families. Develop specific competency in the delivery of resident service programs to new targeted populations, especially low-income seniors. **Continue to develop and support a continuum of resident service programming to provide services from infancy through adulthood to self-sufficiency.**

5.1 Develop adequate funding resources to maintain Promotores program through 2015.

5.2 Continue the practice of the biennial Resident Survey to stay closely aligned with needs of residents. Develop resident service programs that are responsive to needs identified in survey.

5.3 Continue to explore partnerships and collaborations with other organizations to develop programs for residents that allow us to leverage other funding sources.

5.4 Monitor changing demographics in Washington County and in resident population to identify new/changing target populations for housing development and resident service programs.

5.4 Continue to engage community members and partners in the development and implementation of programs through groups like the Promotores Advisory Group and Financial Literacy Advisory Board, and others as appropriate.

5.5 Continue practice of semiannual meetings of onsite property managers and staff with Promotores and Bienestar resident service staff to ensure effective working relationships, clear separation of roles and responsibilities.

5.6 Continue dedicated effort to intervene in the lives of the second generation immigrant children through comprehensive and holistic youth programs that improve academic performance, enrich their lives, and support education through postsecondary. Add new program for high school residents combining IDAS for education with education navigation to prepare for postsecondary education. Consider partnerships for this program with PCC, Pacific, PSU.

- 5.6 Continue to provide comprehensive resident service programs for low-income adults that offer tools and resources to enable them to move more effectively toward self-sufficiency. For low-income senior population, develop and provide programs that enrich lives, promote health and well-being, provide opportunities for cross-cultural and cross-generational activities.
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## 6. Organizational Effectiveness

**Goal:** Maintain an effective, motivated and stable organization that is high-functioning and rewards performance. Engage in succession planning and building key personnel positions for the future of the organization. Continue to use professional volunteer programs to augment staff capacity. Continue to develop strong volunteer base with groups and individuals.

- 6.1 Provide consistent professional development opportunities to enhance the skills of staff as budget allows. Encourage use of scholarships available through membership organizations (WVDO, OON, etc.)
- 6.2 Performance reviews conducted annually with outcomes tied to actions and outcomes outlined in the strategic plan.
- 6.3 Research compensation surveys every 2 years to assure staff salaries are competitive.
- 6.4 Revise organization's Personnel Policy Manual.
- 6.5 Tie merit increases to achievement of measurable performance goals and objectives.
- 6.6 Begin succession planning for transition of Executive Director position in 2015 by funding, recruiting, training staff to take over functions of asset management, property development, fund development.
- 6.7 Build strong resident services staff for the future of the organization by funding, recruiting, training program services manager position.
- 6.8 Continue to use professional volunteers that augment staff capacity at a low cost, e.g. AmeriCorps, VISTA, Jesuit, Easter Seals.
- 6.9 Continue to build and develop strong base of individual and group volunteers.
- 6.10 Continue practice of weekly supervision and weekly team/staff meetings with time for recognition and celebrations. Conduct annual offsite staff retreat.

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## 7. Board Development

**Goal: Develop and maintain a strong, active, informed and contributing Board of Directors whose governance and support roles help Bienestar achieve its mission.**

- 7.1 Fully functioning Board Development Committee is active year round in recruitment, Board training. Board self-assessment and retreat planning.
- 7.2 Conduct annual Board self-assessment.
- 7.3 Achieve 100% Board giving annually with 1/3 of gifts at the major gift level.
- 7.4 Maintain diversity in board membership (age, gender, profession, ethnicity, etc.)
- 7.5 Comply with CHDO requirements for 1/3 board membership meeting criteria outlined in HUD regulations.
- 7.6 Board conducts annual evaluation of progress of Strategic Plan and prepares for development of new plan in 2014.
- 7.7 Conduct formal orientation for new board members.
- 7.8 Continue tradition of board training to ensure an informed decision-making body.
- 7.9 Board conducts annual performance review of Executive Director.
- 7.10 Continue to develop practices, processes and policies that encourage full integration and participation of Spanish-speaking Board members.
- 7.11 Consider annual board retreat. Hold Board retreat for planning and development of new Strategic Plan in 2014.