



# Preservation of Affordable Housing **Strategic Plan 2022-2026**





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# Strategic Plan 2022-2026

**Preservation of Affordable Housing (POAH)** is a nonprofit developer, owner and operator of more than 12,000 affordable homes in eleven states and the District of Columbia. POAH's mission is to preserve, create and sustain affordable, healthy homes that support economic security, racial equity, and access to opportunity for all. POAH Communities (POAHC), POAH's property management division, oversees the leasing and operations of POAH's housing communities, providing high-quality property management and customer service to our residents.



This strategic plan was crafted in POAH's 20th year, and defines a roadmap the team will follow over the next five years (2022-2026). The plan's strategies and actions were developed by the staff of POAH and POAHC – with feedback and support from the POAH Board of Directors, residents, partners, and other stakeholders – as a framework to support the team's steadily growing impact in service of our mission and our residents.

Following an overview of the plan development process, this plan document restates POAH's mission and core values and briefly summarizes the company's strategic context. Against that background, the document identifies key strategic themes that run through the plan, and then identifies strategies and measurable goals in each of eight priority areas of POAH's work.

# Overview of Plan Structure

Priority Areas	Strategies			
<b>Growth</b>	Project Type	Geography	Project Review/ Criteria	Partnerships
<b>Real Estate Development</b>	Community Impact	Collaboration	Systems	
<b>Better Buildings</b>	Scoping and Design	Property Stakeholders	Sustainability	
<b>Resident Outcomes</b>	Resident Empowerment	Economic Opportunity	Trauma Resiliency	Program Approach
<b>Property Management &amp; Stewardship</b>	Property Stewardship	Recruiting & Onboarding	Property Team Supports	Trauma-Informed Property Management
<b>Internal Coordination</b>	Communications	The POAH/C Way	Collaborative Spirit	Inclusive Culture
<b>Finance</b>	Capital Access	Reinvestment	Risk Management	
<b>Talent Management</b>	Staff Capacity	Work-Life Balance	Recruitment, Hiring and Onboarding	Skill Building & Advancement

# Background and Process

POAH's planning process began in the fall of 2020 with an all-staff briefing and the launch of a strategic plan coordinating committee (SPCC) comprising staff from across the company (including POAH and POAH Communities). POAH engaged two consulting teams to support the planning work: VIVA Consulting, for general planning expertise, and Building For Mission (BFM), to support our efforts to incorporate Race, Equity, Diversity and Inclusion (REDI) priorities throughout the plan.

The winter of 2020-21 was devoted to "context-setting" – gathering information and feedback from multiple stakeholders to define the context and framing for the planning work to be done. During this phase, POAH surveyed all staff (central office and property staff) and board members on their perceptions of opportunities, challenges, and ideas for specific improvements, and held meetings with each department/team (including the Diversity, Equity and Inclusion Working Group) to gather feedback on issues to be addressed in the plan. During this period, POAH also hosted a resident focus group and a discussion with the board's Public Policy and Strategic Planning Committee, surfacing key priorities in both sessions.

In late February 2021, POAH held a virtual all-staff convening to conclude the context-setting process and launch the planning work. This session featured presentations from each department on their priorities, feedback from the staff survey, and breakout discussions on POAH's mission and values. Following the convening, POAH launched eight staff working groups, each focused on a priority area of POAH's operations and assigned a set of strategic questions to consider (defined based on context / feedback gathered to date).

Through the spring, the volunteer staff working groups (participants listed as Appendix A) met regularly to develop strategic recommendations in their assigned priority areas. Each group participated in a planning session facilitated by BFM, designed to help identify opportunities to advance REDI commitments in the assigned priority area. Groups also conducted outreach to other staff, did research, and received support as needed from VIVA Consulting. The groups' recommendations were presented at a second all-staff convening in June, which featured opportunities for staff feedback through instant polling and breakout groups for deeper engagement.



During the summer of 2021, the working groups’ detailed recommendations were vetted and refined with feedback from staff responsible for implementation, the SPCC and DEI Working Group, VIVA, BFM, and others. In addition, VIVA interviewed POAH external stakeholders and partners across a range of categories, gathering their perspectives on POAH’s strengths, areas for improvement, and opportunities for greater impact. In September, the working groups’ recommendations – together with selected other proposals derived from feedback received throughout the process – were assembled in a detailed matrix defining strategies in each priority area, as well as specific actions underlying each proposed strategy.

The POAH Board’s Public Policy and Strategic Planning Committee reviewed and commented on the draft strategic plan recommendations at its meeting in late September. In addition, in late September and early October, the SPCC met to discuss the draft plan and provided detailed feedback. After revisions to incorporate feedback from both groups, the plan was formally adopted by the full POAH board at its November 2021 meeting.

The President’s Office is managing implementation of the plan in collaboration with POAH’s Leadership Team through POAH’s existing annual departmental work plans and the annual budget process. The Strategic Plan Coordinating Committee will be convened periodically during the plan period to consider the need for updates in response to changes in POAH’s operating environment or other circumstances.

# Mission and Core Values

POAH's primary mission is to preserve, create and sustain affordable, healthy homes that support economic security, racial equity, and access to opportunity for all.

These core values support and inform the pursuit of our mission:

- **SERVICE:** We serve a broad range of people, but our focus is on low- and moderate-income households who may not have access to decent, safe and healthy housing.
- **OPPORTUNITY:** We know that many of our residents need more than just stable housing to succeed and we seek to improve their access to opportunity.
- **CITIZENSHIP:** Our properties contribute to the health of their surrounding communities.
- **PARTNERSHIP:** We believe in the value of partnership with residents, neighbors, development partners, public agencies, funders and other stakeholders.
- **STEWARDSHIP:** We are long-term owners and operators of our communities, and so we insist that they be financially, physically and environmentally sustainable over a long time horizon.
- **SUSTAINABILITY:** We invest in energy efficient and environmentally sustainable buildings not only to reduce operating costs, but because it's the responsible thing to do.
- **ADVOCACY:** We bring the lessons of extensive experience to inform and improve public policy.
- **PERFORMANCE:** We value property financial performance because it allows us to enhance our impact in our communities and advance our mission into new communities.
- **TEAMWORK:** We are committed to a culture of collaboration, inclusion, and hard work, and we promote opportunities for professional growth.



- **DIVERSITY & INCLUSION:** We believe a diverse and inclusive team is a stronger, smarter team, and we actively promote diversity and meaningful inclusion of different perspectives among our board, our staff, our partners, in our procurement of good and services, and at our communities.
- **RACIAL EQUITY:** We understand that addressing structural racism and achieving racial equity are central to the work we do and we proactively integrate the issue of race in our housing work.
- **ACCOUNTABILITY:** We live up to our commitments, consistently conducting our business according to the highest standards of integrity and professional excellence.
- **INNOVATION:** We develop and execute creative solutions to problems others may see as insurmountable.
- **IMPACT:** We systematically measure our impact across multiple realms, using data to improve performance and enhance our impact.

# Strategic Context

This plan is informed by POAH's assessment of its strategic context – its strengths and vulnerabilities, as well as the opportunities and challenges it faces in the years ahead. This assessment of the company's strategic context was developed with reference to surveys of the staff and Board, interviews with key partners, the deliberations of the SPCC and planning groups, feedback from VIVA and BFM, and other sources.

There is strong consensus among staff, Board, and stakeholders on POAH's strengths as a development sponsor – centering on its strong track record with complex projects, including both preservation transactions with challenging regulatory issues as well as larger initiatives that bring positive change to communities facing various levels of distress. POAH's partners noted its commitment to building strong relationships with mission-aligned partners, from housing agencies to community-based entities.

At the same time, prospects for future growth are tempered by growing competition from profit-motivated equity funds competing to acquire the properties POAH seeks to preserve, requiring POAH to pursue new strategies and new funding sources to stay competitive. In this context and others, POAH's financial strength – its robust asset base, stable operating revenue, and its ready access to capital – continues to be a significant advantage.

POAH's integrated property management capacity, and its commitment to long-term stewardship of the communities it develops, are widely cited as key strengths. At the



same time, both staff and stakeholders acknowledge the inherent challenge of fully integrating the company's ownership and property management functions. POAH's commitment to, and investment in, resident success is also viewed as a key strength and an important part of the company's identity and mission. At the same time, the median age of POAH's properties is rising over time, requiring increased capital investments – but also offering opportunities for refinancing events which can address physical needs and generate net resources to support the mission.



POAH’s staff is viewed by its partners as talented and experienced, with a deep skillset spread broadly across the team. The staff are deeply committed to POAH’s work and describe it as a great place to work. POAH’s culture is frequently described as “hardworking” in staff surveys, and that has been all the more true amid the added burdens of the COVID pandemic. While POAH’s staff count has outpaced portfolio growth over the last five years, there is broad consensus that continued portfolio growth will require continued investment in internal capacity. Moreover, as the team continues to grow, the need to support effective collaboration across teams and departments – through investments in systems, training, and culture – becomes ever more essential.

Looking ahead, POAH appears well-positioned to significantly expand its impact. As the US begins to emerge from the COVID-19 pandemic, the housing affordability gap is increasingly a focus of federal and state policymakers. Federal pandemic recovery legislation may deliver new affordable housing funding on an unprecedented scale – potentially accelerating the production pipeline for sponsors with the capacity to seize the moment. Meanwhile, new preservation challenges are emerging – in particular, the expiration of affordability protections at the earliest cohorts of Housing Credit properties, and the rapid loss of affordability in existing unassisted/unrestricted naturally occurring affordable housing properties targeted for repositioning by investors – presenting new demands for POAH’s preservation expertise.

POAH also has real opportunities – and demands – to continue to drive positive impact beyond housing affordability. Action for racial justice remains a widely shared and deeply held commitment for the company’s staff and Board. Internal and external stakeholders recognize the impact of racism, and especially of racist housing policies, in the communities where POAH works, and regard anti-racism as a core part of POAH’s mission which should inform every part of the company’s operations.

Similarly, there is broad consensus that more must be done to reduce energy consumption and improve climate resiliency in affordable housing, and that POAH – already a leader in these efforts – can continue to lead the field, with support from new federal COVID-recovery resources. And POAH has exciting opportunities to build on its substantial investments in Community Impact over the past five years to deploy new tools – high-speed, low-cost internet service through community-scale wi-fi; remote delivery models for its Family Self Sufficiency program; and partnerships with health partners to support indoor air quality improvements – to help its residents thrive.





# Key Themes

As noted above, the structure of this strategic plan corresponds to eight priority areas identified through the planning process, but a number of important themes and issues span across those priority areas, each representing an important focus in its own right. Some of the most important include:

- **RACIAL EQUITY, DIVERSITY AND INCLUSION (REDI):** Continued progress advancing POAH's REDI commitments is a priority shared widely among the staff, board, and other stakeholders, and this priority is woven into every section of the plan. Every planning group was charged with making recommendations to promote REDI in their focus area, and the result is a broad range of strategies and actions which will help POAH continue to make REDI progress in every aspect of its work.
- **RESIDENT ENGAGEMENT AND EMPOWERMENT:** POAH knows from long experience that its impact is greatest when residents are engaged and empowered. This plan reflects that realization, providing expanded opportunities for resident voice – in the design and construction process, in property operations, and through a new Resident Advisory Board.
- **TRAUMA-INFORMED PRACTICES:** POAH's *Designing Resilient Communities* initiative, underway since 2020, is already yielding important insight on the potential to incorporate trauma-informed practices in affordable housing design, property operations, and resident services. The plan calls for those insights to be applied across POAH's operations as they emerge from the Resilient Communities pilot sites, reshaping how POAH staff and residents will interact.
- **SUSTAINABILITY:** Environmental sustainability is an existing POAH commitment, and the plan reflects consensus among POAH's stakeholders to continue to ramp up efforts in this area, with much more ambitious goals for building performance as well as increased emphasis on climate resiliency. This increased emphasis is informed by the recognition that environmental justice is a key area for POAH's racial equity initiatives.
- **CAPACITY FOR GROWTH:** POAH's affordable housing mission is realized through growth; preservation and construction expand POAH's portfolio and extend its impact. The plan calls for continued growth similar to the pace achieved over the past five years. This plan also reflects the recognition that POAH's capacity, including its staffing levels, must continue to keep pace with this growth.



- **SUPPORTING THE TEAM:** POAH’s hardworking culture has long been an asset, but its corollary is a need to ensure workloads are appropriate and manageable. Beyond the continued commitment to expand staffing in tandem with portfolio growth, this plan includes strategies to ensure staff are fully supported, have the tools they need to manage their workloads, and have competitive benefits and flexible work environments.
- **INTERNAL COLLABORATION:** POAH’s impact relies on efficient collaboration across internal teams in every realm of its work – a need that becomes both more important and more challenging as the company grows. This imperative appears in proposals throughout the plan (as well as in an entire priority area devoted to collaboration) for ongoing investments in systems and processes, communications, and culture to help the POAH team function as a unified whole.
- **THE POAH/C WAY:** As POAH continually strives for excellence in every area of its work, it has developed best practices and core tools to ensure key functions are performed to a consistently high standard. Every section of this plan reflects the need to ensure that every member of the team has access to the training, tools and support they need to do their job “the POAH/C Way.”



# Strategic Recommendations

The sections to follow outline recommended strategies in each of eight priority areas, including: (a) an overview of the proposed approach; (b) a set of target outcomes; and (c) a description of the strategies proposed.

Each strategy identified incorporates 3-6 recommended actions. These actions will be incorporated in annual workplans during the 2022-26 plan period. Please note that some items to follow (including but not limited to items beginning “POAH should continue to...”) call for POAH to continue and/or expand strategies and actions already underway.





# Growth

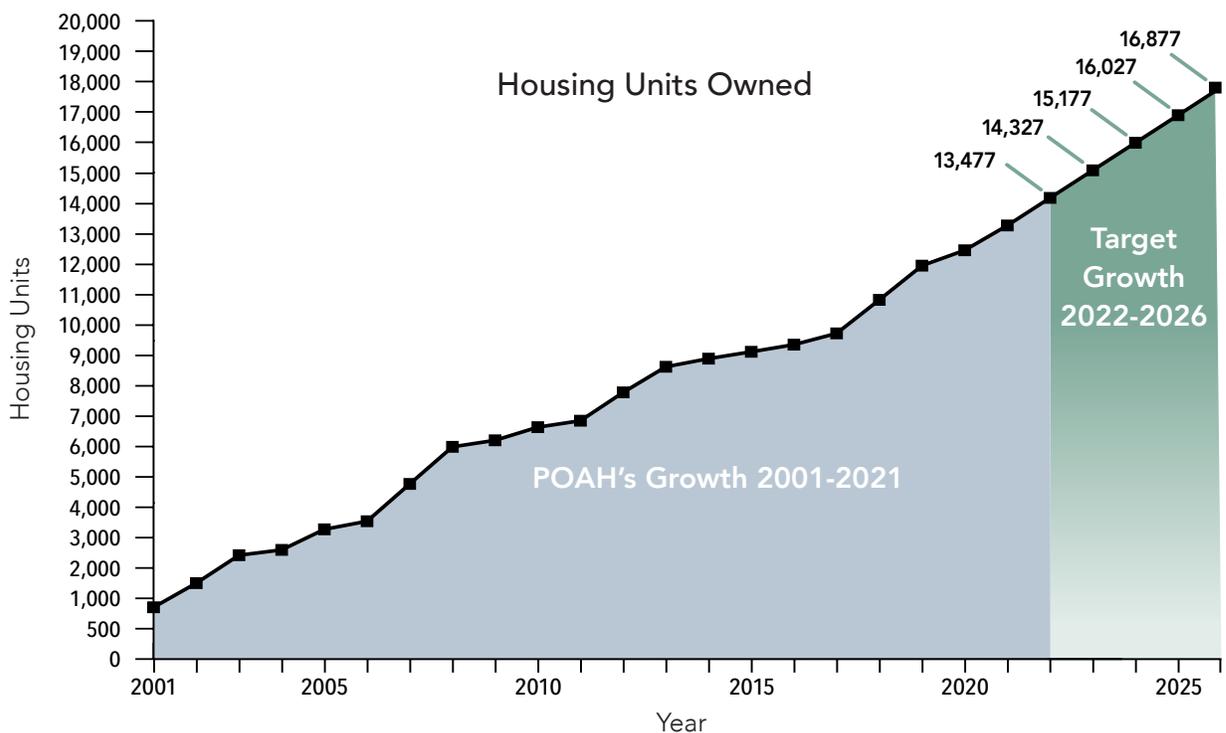


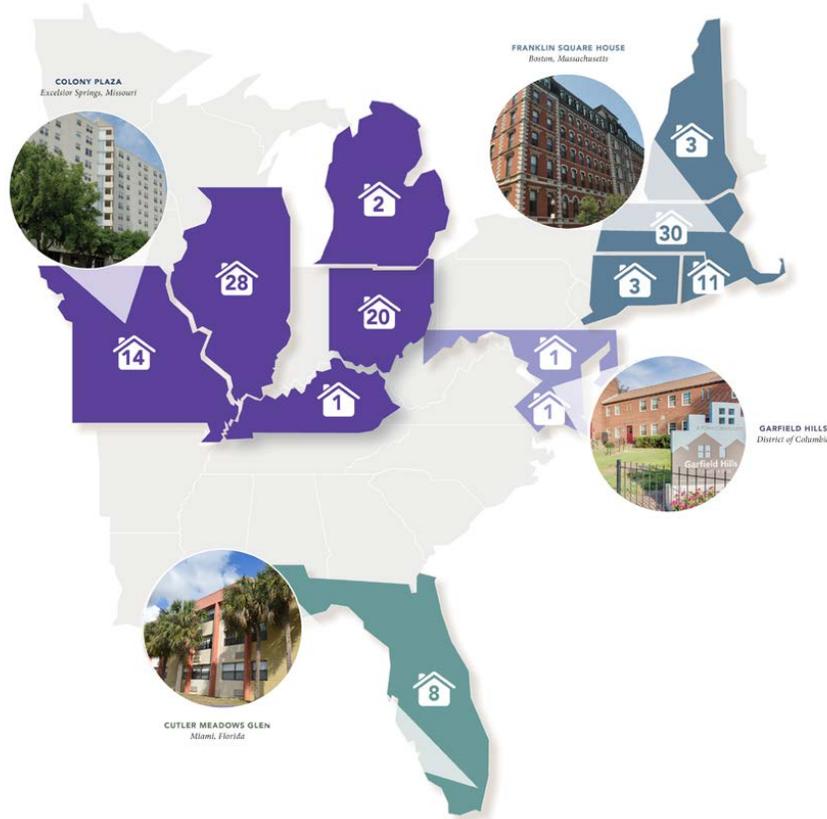
# Growth

POAH should continue to expand its mission impact by seeking new preservation and development opportunities where it can make a positive difference for residents and communities, and by continuing to build internal capacity to keep pace with this growth. In project structuring and review, POAH should prioritize racial equity, community impact, and long-term stability. POAH should continue to work with mission-aligned partners to expand capacity, access new markets, and test new business models.

## Goals:

- Acquire, build or support **5,000 housing units**. Within that total:
- Preserve **750 units of at-risk unassisted affordable housing** (in LIHTC or NOAH properties)
- Support **750 homeownership opportunities** (through development partnership or resident supports)
- Undertake new projects with **10 Minority Business Enterprise/Black, Indigenous, People of Color (MBE/BIPOC)-led development partners**
- Pursue geographically diverse pipeline through **new projects in 8 states (existing or new markets)**





## Strategies:

**Project Type:** POAH should continue to focus on preservation, developing responses to emerging preservation risks, including LIHTC Year 30 and NOAH properties. POAH should manage new construction exposure, limit commercial exposure to mixed-use developments, and support homeownership through development partnerships and resident supports.

**Geography:** POAH should seek greater geographic diversity in its project pipeline, emphasizing expansion in places where POAH's existing pipeline is not constrained by resource queues. At the community/site level, POAH should pursue new opportunities in locations where its work can make a difference for residents.

**Project Review:** POAH should incorporate a racial equity screen in its investment review process, and prioritize diverse voices in that process. POAH should continue to define financial thresholds for new investments, prioritizing long-term financial performance over short-term returns. Staffing implications should be incorporated into new project forecasts.

**Partnerships:** POAH should continue to grow through partnerships with mission-aligned partners, with a new focus on partnership with BIPOC-owned or -led entities. POAH should carefully define goals and roles for its partnerships, and use partnerships to test new business models, including homeownership development.



# Real Estate Development



# Real Estate Development

POAH should leverage its real estate development work – including its selection of development, funding and construction teams – to support racial justice and community benefit. Building on its existing collaborative development approach, POAH can optimize its real estate development systems and processes to support timely collaboration with all project stakeholders – in particular, property management staff and residents – to ensure consistently strong project outcomes.

## Goals:

- Target **35% or more of project hard costs to Minority Business Enterprises (MBEs)** and **10% or more to Women Business Enterprise (WBE)** on average
- Target **20% or more of project third-party vendor costs to MBE/WBEs** on average
- Deploy core tools for every project (project mission statement; standardized Smartsheet project schedule; cross-departmental MS Teams platform)

## Strategies:

**Community Impact:** POAH should leverage its development work to advance racial and economic justice. POAH should continue to set and track MBE and WBE spending goals for each project’s hard costs and should expand this effort to target project soft costs as well. POAH should incorporate REDI-focused questions in its RFPs for project debt and equity funding sources.

**Collaboration:** POAH should prioritize effective, timely collaboration on active development projects, beginning by creating a mission statement to define shared goals for each project. A standardized, shared project schedule will support consistent engagement of key stakeholders, including the POAH Communities team and residents.

**Systems:** POAH should streamline its development systems and processes to focus on a single, effective suite of shared tools, centered on the Microsoft Office 365 Teams/SharePoint platform. POAH should increase investment in ongoing training, support and oversight to ensure consistent and effective use of these tools.



# Better Buildings



# Better Buildings

Excellent buildings are at the foundation of POAH's mission to provide sustainable, healthy, affordable housing. POAH should continue to strive for excellence in project design – consistently incorporating feedback from key stakeholders including residents, site teams, and project partners – and commit to high standards for energy performance and indoor air quality.

## Goals:

- Design **all new construction projects to Passive House** standard by 2025
- Target an average of **20% energy/water savings across all substantial rehabilitation** projects





### Strategies:

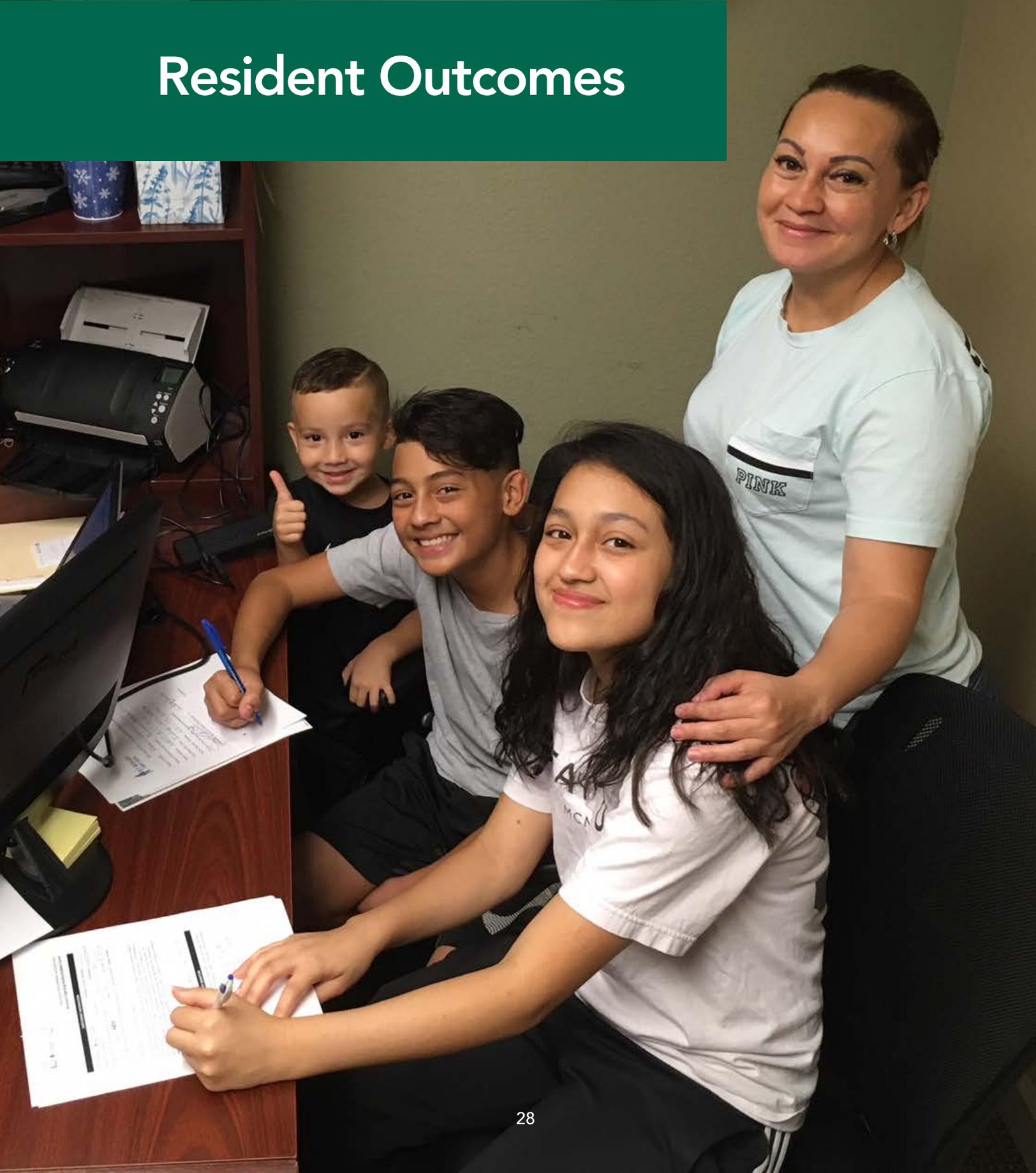
**Scoping and Design:** POAH should continue to optimize its design processes, consistently incorporating key inputs including standard Capital Needs Assessment (CNA)/walkthrough scope, and early general contractor engagement. All project teams should evaluate and address climate change vulnerabilities, and should evaluate new technologies to support building performance and cost control.

**Property Stakeholders:** POAH should consistently and effectively engage property staff and residents in scoping and design processes, and should incorporate trauma-informed principles in project designs. This engagement should continue through construction completion, with effective transition to the property management team and resident training and support on new systems.

**Sustainability:** POAH should prioritize sustainability and environmental justice by targeting Passive House standards in new construction projects, at least 20% improvement in energy/water usage in rehabs, and healthy indoor air quality interventions in all projects. POAH should also seek to reduce its carbon footprint through electrification and onsite generation at its properties.



# Resident Outcomes



# Resident Outcomes

POAH should continue to expand its efforts to empower its residents – expanding opportunities for resident voice in POAH’s operations; providing robust support for residents’ economic success; adjusting operations to respond supportively to legacies of trauma; and optimizing program models to ensure accountability and impact.

## Goals:

- Offer the **Family Self Sufficiency program at all eligible sites**
- Support exits to **homeownership for 550 residents**
- Launch high-speed, low-cost, in-unit **wi-fi service at 25 sites**
- Launch a new **resident advisory board**
- Deploy **voter registration** initiative at all properties

## Strategies:

**Resident Empowerment:** POAH should launch a new resident advisory board, and seek other opportunities to empower residents – including through resident engagement in the development process, solicitation and applied use of real-time feedback, and expanded civic engagement efforts including continuing its voter registration initiative.

**Economic Opportunity:** POAH should support economic opportunity for residents, including by expanding the Family Self Sufficiency program to every eligible site, supporting exits to homeownership, providing low-cost broadband internet service, and expanding resources for families with children.

**Trauma Resiliency:** POAH should incorporate trauma-informed principles in Community Impact programs by implementing best practices emerging from POAH’s Designing Resilient Communities pilot sites, including training and supporting all members of site teams to allow them to provide trauma-informed resident support.

**Program Approach:** POAH should continue to optimize its resident program delivery to maximize impact, including providing ongoing training and peer exchange for CICs; incorporating goal definition and outcomes evaluation in all program models; refining long-term operating plans for POAH’s Resource Centers; and building partnerships for onsite health service delivery.

# Property Management & Stewardship



# Property Management & Stewardship

POAH should continue to expand its efforts to empower its residents – expanding opportunities for resident voice in POAH’s operations; providing robust support for residents’ economic success; adjusting operations to respond supportively to legacies of trauma; and optimizing program models to ensure accountability and impact.

## Goals:

- Invest **\$120M in capital investments for properties owned** at start of plan period
- Incorporate **trauma-informed practices** in property management
- **Double MBE/WBE utilization** as a share of property third-party spending from 10% to 20%

## Strategies:

**Property Stewardship:** POAH should continue to prioritize long-term physical quality for its properties – through robust replacement reserve deposits, recapitalization events, and the creation of a new capital needs reserve held at the enterprise level; and should seek new owners for properties where POAH is not the best owner. POAH should also ensure its communities are advancing racial and economic justice by increasing MBE/WBE spending in operating budgets.

**Recruiting & Onboarding:** POAH should increase its investment in recruitment and onboarding for site staff. Building on a commitment to competitive compensation, POAH should increase marketing to support recruitment; train managers on effective interviewing practices; and increase investment in onboarding and training systems and resources.

**Property Team Supports:** POAH should help to reduce demands on property staff by streamlining tasks and workflows, better coordinating central-office requests, supplying training and resources to support efficient work, and providing workplace flexibilities to help staff to reduce disruptions in their workdays.

**Trauma-Informed Property Management:** POAH should incorporate trauma-informed principles in property operations by implementing best practices emerging from POAH’s Designing Resilient Communities pilot sites.

# Internal Coordination



# Internal Coordination

As POAH grows in scale and complexity, effective internal coordination is ever more essential for its continued success. POAH should continue to encourage seamless collaboration within and across its departments by deploying and supporting streamlined internal communications systems; consistently preparing all staff to perform their roles “the POAH/C Way”; and by fostering a collaborative workplace culture that is inclusive for staff from all backgrounds.

## Goals:

- Launch a new **POAH SharePoint intranet website** to facilitate information access
- **Deploy MS Teams** to support property/project-focused collaboration across departments
- Develop and deliver training and resources on **“The POAH/C Way” in each department**
- Audit and **improve 1 key process in each department** each year

## Strategies:

**Communications:** POAH should launch or enhance internal communications systems to support open, on-demand access to information and support collaboration across departments – including a new SharePoint site; a robust Microsoft Teams architecture centered on properties and projects, not departments; and other all-staff internal communications venues.

**The POAH/C Way:** In every department, POAH should document key best practices and workflows, increase departmental training and support to ensure consistent compliance, and regularly seek opportunities to improve existing processes to maximize efficiency.

**Collaborative Spirit:** POAH should continue to encourage a spirit of collaboration across its departments by providing opportunities for connections across departments – joint trainings, cross-disciplinary working groups, platforms for shared learning, cross-training, and other strategies.

**Inclusive Culture:** POAH should continue to foster an inclusive culture by implementing related recommendations from its DEI Working Group, including recurring trainings and discussion session on race, equity, diversity and inclusion (REDI) topics, as well as space and support for staff to connect with each other both within and across demographic distinctions.

# Finance



# Finance

POAH's financial strength, carefully built over 20 years, can be leveraged now to secure new, more flexible capital sources to support expanded impact. At the same time, POAH is positioned to deploy significant retained earnings – for investments in its existing properties, in new real estate opportunities, and in residents' success. As it seizes these opportunities, POAH must continue to take the long view, acting as a prudent long-term steward of the assets for which it is responsible.

## Goals:

- Raise at least **\$60M in new bond proceeds** to generate flexible, low-cost, long-term capital for POAH's work
- Grow POAH's **Mission Capital Fund to \$40M by 2026** to support mission-related investments
- Dedicate at least **\$10M in POAH funds to POAH's Community Impact Fund** to support resident success
- Raise at least **\$7.5M in third-party funds to support Community Impact** initiatives

## Strategies:

**Capital Access:** POAH should significantly expand its access to capital to support its work, including securing a corporate bond rating to access flexible lower-cost capital; and should continue to develop a more comprehensive approach to long-term capital planning and funder relationship management.

**Reinvestment:** POAH should continue to increase contributions from annual operating net income and capital events to grow the Mission Capital Fund (supporting investments in new or existing properties), increase investment in Community Impact initiatives (with accompanying fundraising), and to fund a new enterprise-level reserve to support urgent capital investments at properties with insufficient local resources.

**Risk Management:** POAH should continue to actively manage and mitigate risk at all levels – including through consistent application of financial standards for new projects, management of concentration mix in the development pipeline, and the use of scenario planning to ensure resiliency in enterprise-level operating budgets.

# Talent Management



# Talent Management

POAH is its people, and the company should continue to ensure that its people are fully supported and fairly rewarded for their commitment. POAH should continue to develop a more diverse and inclusive team by continuing to implement the recommendations of its DEI Working Group; and should increase efforts to ensure every member of the team has opportunities for skill development and professional advancement.

## Goals:

- Ensure that POAH continues to pay competitive salaries and benefits by using third-party compensation studies and other methods and implementing adjustments accordingly
- Ensure that leave benefits exceed the industry averages based on industry surveys

## Strategies:

**Staff Capacity:** POAH should continue to grow its central office staff capacity in pace with the growth of its portfolio of properties, seek ways to reduce demands on staff by streamlining work processes, and provide training and support to help staff manage workload.

**Work-Life Balance:** POAH should help its staff balance the demands of work and home life by continuing to provide flexible policies for remote work and flex time where positions permit, setting healthy boundaries and expectations for work, providing generous family leave options, and other policies. POAH should also seek opportunities to support employees' financial resiliency by encouraging savings and asset building.

**Recruitment, Hiring and Onboarding:** POAH should continue efforts to bring more BIPOC representation into the affordable housing field, implementing DEI Working Group recommended best practices in recruiting, interviewing, hiring and onboarding. Existing staff should continue to be engaged in recruitment, interviewing, and onboarding processes.



**Skill Building:** POAH should prioritize hiring candidates for ability, initiative and commitment, and increase investment in on-the-job skill development to help employees excel in their roles. In particular, POAH should provide more internal trainings on corporate and departmental processes; provide more generous professional development allowance for every employee; and seek opportunities to celebrate and encourage skill building among the staff.

**Advancement:** POAH should continue to provide competitive compensation and benefits and take steps to ensure that staff in all positions have paths for advancement and opportunities for leadership. POAH should continue to use a Racial Equity, Diversity, and Inclusion (REDI) screen to ensure equity in pay and promotions, and update the performance review process to reflect additional competencies and sources of feedback.



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# Appendix A

## POAH / POAH Communities - 2021 Strategic Plan Working Groups

### Strategic Plan Coordinating Committee

#### Members:

Brad Blake	Judy Jacobson
Claudia Rodriguez	Julie DeGraaf
Cory Mian	Lauren Corcoran
Dena Xifaras	Ronnie Slamin
Felicia Dawson	Terri Powell Rands
James Singleton	

### Growth Strategy

**Chair 1:** Alex Finigan  
**Chair 2:** Charlie Dirac  
**Coordinator:** Carolyn Tilney

#### Members:

Allison Adduci  
 Bill Eager  
 Cory Fellows  
 Cory Mian  
 Haley Ayotte  
 Julie Creamer  
 Monica Makin  
 Rochelle Beeks  
 Vince O'Donnell

### Real Estate Development

**Chair 1:** Julie DeGraaf  
**Chair 2:** Terri Powell-Rands  
**Coordinator:** Aly Stein

#### Members:

Brenda Hernandez  
 Cory Mian  
 Deanna Savage  
 Felicia Dawson  
 Jeff Rohr  
 Molly Ekerdt  
 Nate Dick  
 Rodger Brown  
 Sam Bryson-Brockman  
 Zac Johnson

### Better Buildings

**Chair 1:** Claudia Rodriguez  
**Chair 2:** Julie Klump  
**Coordinator:** Katelin Morgan

#### Members:

Cory Fellows  
 Dana Mastrangelo  
 Domenic Columbo  
 Jon Springfield  
 Lauri Brown  
 Michael Donovan  
 Neil Long  
 Sasha De La Cruz  
 Stella Dang

# Appendix A

## POAH / POAH Communities - 2021 Strategic Plan Working Groups

### Resident Outcomes

**Chair 1:** Felicia Dawson  
**Chair 2:** Julianna Stuart  
**Coordinator:** Nate Flynn

**Members:**

Alex Swift  
D. Ann Conley  
Julie Creamer  
Lauren Legocki  
Meena Jacob  
Ronnie Slamin  
Teena Taylor  
Vicky White  
Vince O'Donnell

### Property Management & Stewardship

**Chair 1:** Jen Cavaco  
**Chair 2:** Patti Kulick  
**Coordinator:** Alex Swift

**Members:**

Bill Ammon  
Brigit Buhle  
Dena Xifaras  
Lisa Dixon  
James Singleton  
Jason Gilbert  
Julie Klump  
Kevin Baptista  
Lauren Legocki  
Michelle Mitchell  
Scarlette Jones  
Terri Powell-Rands

### Internal Coordination

**Chair 1:** Dena Xifaras  
**Chair 2:** Greg Katz  
**Coordinator:** Tyler Campbell

**Members:**

Aly Stein  
Catherine Machado  
Donna Menefee  
Enrique Lam  
Heather Kerekes  
Jeff Rohr  
Linda Smith  
Molly Ekerdt  
Monica Makin  
Sam Bryson-Brockman

### Finance

**Chair 1:** Konrad Schlater  
**Chair 2:** Lauren Corcoran  
**Coordinator:** Enrique Lam

**Members:**

Alex Finigan  
Amos Allen  
Brad Blake  
Carolyn Tilney  
Doug Dempsey  
Heidi Livingston  
Randy Parker  
Sophia Transtamar

### Talent Management

**Chair 1:** Judy Jacobson  
**Chair 2:** Kathleen Day  
**Coordinator:** Roxcell Rigby

**Members:**

Bill Eager  
Claudia Rodriguez  
EJ Morton-Green  
Joyce Jegen  
Julianna Stuart  
Kathy Carpenter  
Maria Plati  
Nathaniel Leach  
Randy Parker  
Tyler Campbell



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