



FY14-15 Operational Plan

Progress Report

March 31, 2014

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Progress Summary

The operational plan has a total of 142 performance indicators. Of the 46 indicators with target dates on or before March 31, 2014, 41% have reached the 100% completion mark on schedule. 40% are in progress and the remaining 19% are on hold or have not made any progress.

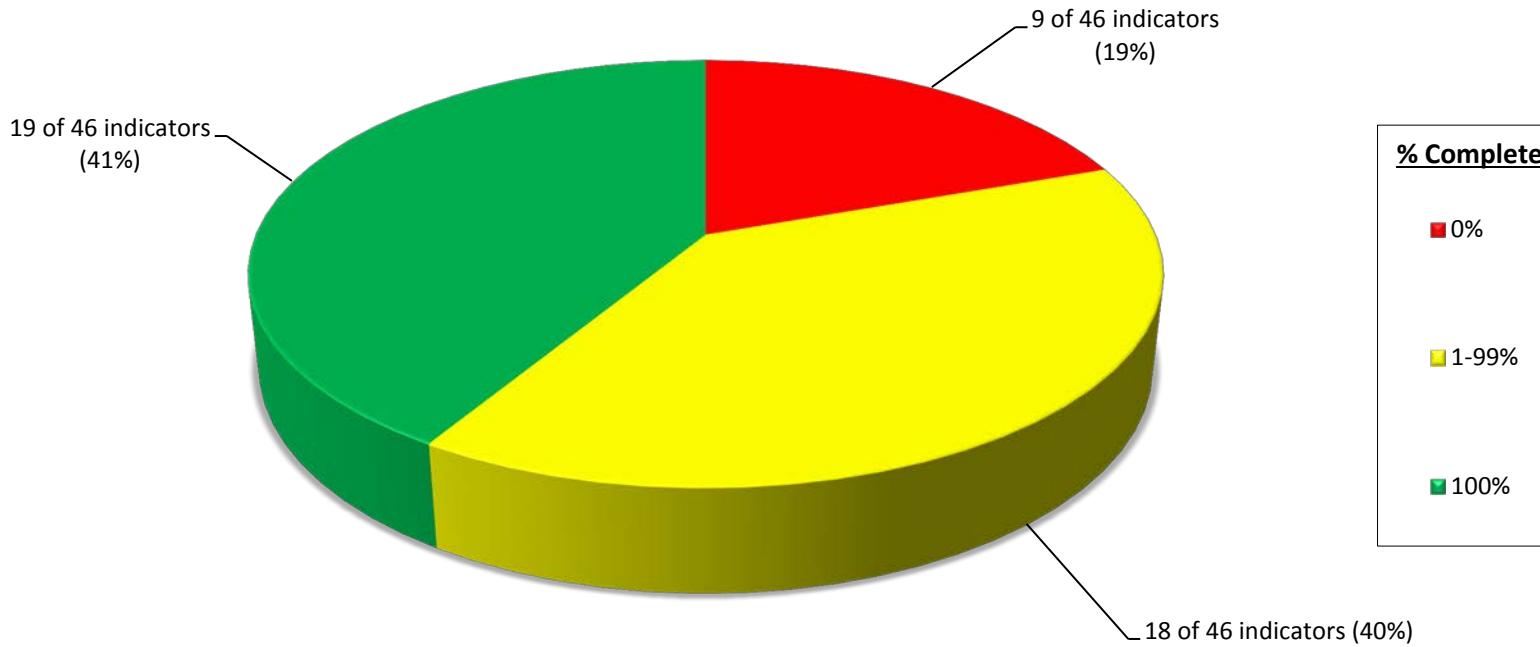
The indicators which have reached 100% are dynamic and only represent a transition point. The work associated with these measures will continue as will reports on the associated benchmarks.

The most progress has been made under Strategic Priority 1 – Address Affordable Housing Needs, specifically under Expand and Maintain the Supply of Housing Stock (see 2013-2016 Strategic Plan on page 24).

The 9 performance indicators with zero activity share common impediments to their immediate progress (see table on page 23). These include:

- Staffing challenges/delays
- HR transition to the Division of Administration
- Lack of resources/funding
- Delays pending the completion of external events (i.e. Housing Needs Assessment, new website launch)

Operational Plan Performance thru March 31, 2014



Dashboard Indicators of Progress towards Goals

● **Done = 100%**
● **In Process**
● **On Hold = 0%**

Goal 1: Address Affordable Housing Needs Objective:	Indicator	Original Target Date	Leader	Progress Indication			
				1Q	2Q	3Q	4Q
Preserve existing homes	Design an in-house rehab program under the Homeowner Repair Department	12/31/13	B. Sweazy	●			
	Implement the RAD Program, with identified financial and technical resources, with PHAs	3/31/14	B. Sweazy	●			
Provide homeownership education	Establish a referral network by partnering with at least two (2) major organizations such as Neighborworks of America and Volunteers of America.	3/31/14	B. Sweazy	●			
Link households to supportive services tailored to improving education, economic growth and employment opportunities.	Hold community outreach with non-profits and state agencies to link 50 households to services each quarter	03/31/14	B. Sweazy	●			
Increase underserved households' awareness of LHC and our available products.	Market LHC's services (LIHEAP, WAP, Rehab, etc.) by visiting churches and businesses in underserved communities to achieve a cumulative 25% increase in service requests.	03/31/14	L. Wallace	●			
	Target non-profits, for profits and units of local government in 13 rural parishes to deliver Homeowner Rehab services to the clients.	01/31/14	B. Sweazy	●			
	Create a unified intake process that refers clients across all applicable programs (i.e. LIHEAP clients to the WAP Program, WAP clients to the Homeowner Rehab program and/or USDA, Federal Home Loan Bank or other community programs, etc.).	01/31/14	B. Sweazy	●			

Goal 1: Address Affordable Housing Needs Objective:	Indicator	Original Target Date	Leader	Progress Indication			
				1Q	2Q	3Q	4Q
Create education, job training programs, employment and career opportunities targeted at underserved populations	Comply with the Hudson and Veterans Initiatives by implementing a 20% contract goal	3/31/14	B. Sweazy	●			
Increase Supportive Housing by decreasing the wait time for placement into Permanent Supportive Housing units	Decrease service eligibility determination time to 10 days from a baseline of 21 days.	2/28/14	N. Sweazy	●			

Goal 2: Address Communities Housing Needs	Indicator	Original Target Date	Leader	Progress Indication			
				1Q	2Q	3Q	4Q
Maintain an adequate supply of affordable housing	Institute a penalty provision for projects found out of compliance with the goal of reducing the length of days a project is out of compliance by 50%.	02/28/14	K. Cunningham	●			
	Establish a complete asset management system to assess the viability of the current stock and determine if aging properties should be rehabbed or replaced.	03/31/14	K. Cunningham	●			
Raise awareness of available resources and issues faced by people who are homeless	Work with the nine (9) CoCs and the LSNDC to develop a coordinated intake and assessment tool	12/31/13	N. Sweazy	●			
	Elevate awareness of the plight of homelessness through targeted outreach to local and state elected officials, heads of housing authorities, and other stakeholders	1/31/14	N. Sweazy	●			
Activate the Housing and Transportation Planning and Coordinating Commission (HTPCC)	Actively engage 51% of the HTPCC members to create a productive and synergistic commission.	12/31/13	N. Sweazy	●			
	Assign an HTPCC staff person and provide the needed staff support to accomplish the goals of the commission.	12/31/13	N. Sweazy	●			
Report and analyze specific housing issues, opportunities, and impediments that include regional and local summaries	Identify key stakeholders, develop an agenda, and initial engagement of regional and local leaders	03/31/14	A. Tillman	●			
	Develop an interactive reporting tool to provide community level data on LHC investments	2/28/14	A. Tillman	●			
	Launch a data and reporting repository on the LHC website	3/31/14	A. Tillman	●			
Identify areas of significant economic growth and industrial investment zones in an effort to spur development of workforce housing	Provide a monthly report that identifies and updates announced economic investment in the planning districts in partnership with LED in the planning districts in partnership with LED	1/31/14	D. Hutchinson	●			
	Partner with LED Regional Directors to develop a network of 64 statewide partners at the local levels	1/31/14	D. Hutchinson	●			

Goal 2: Address Communities Housing Needs	Indicator	Original Target Date	Leader	Progress Indication			
				1Q	2Q	3Q	4Q
Identify opportunities to address housing challenges specifically related to transportation	Provide a monthly report that identifies and updates announced economic investment in the LED planning districts in partnership with DOTD and Workforce Commission	1/31/14	D. Hutchinson				
	Partner with DOTD and to develop a network of 64 statewide partners at the local levels	1/31/14	D. Hutchinson				
Provide outreach and assistance to ensure compliance with state and federal fair housing laws	Hold one (1) annual training on Federal regulations required for recipients of LHC funds	03/31/14	K. Cunningham				
Eliminate impediments to fair housing	Coordinate a Fair Housing Focus Group of 8-10 stakeholders to examine and address policies and facilitate compliance with Fair Housing laws.	01/31/14	K. Cunningham				
	Eliminate language impediments by making the LHC website and resources available in multi-languages and for the hearing-impaired.	01/31/14	K. Cunningham				

Goal 3: Increase Organizational Capacity	Indicator	Original Target Date	Leader	Progress Indication			
				1Q	2Q	3Q	4Q
Objective:	Assist in the development of a legislative financial brief to present agency position/needs to 70% (2/3rds) of legislators in both the House and Senate	12/31/13	R. Landry				
	Develop a Strategic Financial Plan	12/31/13	R. Landry				
Develop a Strategic Financial Plan	Detail available funds and potential availability for use in housing initiatives and operations	1/31/14	R. Landry				
Monitor properties to ensure fiduciary responsibility, financial stability and viability	Prepare and implement a regular schedule for completion of 100% of the properties due for review	1/31/14	Dir. Asset Mgmt.*				
	Create an "irregularities report" that furthers the reduction of non-compliance by 10% each quarter	3/31/14	Dir. Asset Mgmt.				
Improve and maintain physical condition of properties	Review 100% of the projects in the LHC portfolio and develop a non-compliant projects report	1/31/14	Dir. Asset Mgmt.				
Determine if additional underwriting and policy changes are required to mitigate emerging risks	Perform a quarterly analysis of the impact of past underwriting decisions on the condition of the LHC portfolio	3/31/14	Dir. Asset Mgmt.				
	Implement underwriting policies/modules for both Single and Multi-family development	2/28/14	Dir. Asset Mgmt.				
Monitor the significant ongoing changes in its regulatory environment, and continue to enhance LHC's regulatory compliance systems to keep fully abreast of new industry and program requirements	Develop protocols to effectively monitor changes in the regulatory environment	3/31/14	A. Tillman				

**Note: The role of Director of Asset Management has to-date been handled by Keith Cunningham. The associated performance measures will be transitioned to that leader once the position has been filled*

Goal 3: Increase Organizational Capacity	Indicator	Original Target Date	Leader	Progress Indication			
				1Q	2Q	3Q	4Q
Objective:							
Identify and implement process improvement initiatives	Identify at least two (2) processes bi-annually to review, including the cost/benefit analyses for operational aspects.	02/28/14	M. Thomas	●			
Develop and refine eBusiness strategies and systems	Implement tools to generate end-user reports from systems of record	03/31/14	D. Veals	●			
Manage all funding sources via enterprise systems of record	Perform a Systems Architecture and Requirements Description	01/31/14	M. Thomas	●			
Continually identify opportunities to develop in-house expertise	Provide National Development Council (NDC) in-house training for 25 staff members	01/31/14	B. Sweazy	●			
Define core values and align organizational culture	Solicit input from staff to define LHC's core values	1/31/14	F. Tombar	●			
	Launch an internal marketing campaign, including communications standards, that rolls out the LHC brand and culture	1/31/14	F. Tombar	●			
Improve employee morale	Engage the MAC and EAC to launch an employee think-tank to submit recommendations for improving morale	01/31/14	M. Thomas	●			
	Initiate a job satisfaction survey and openly address the top three (3) concerns quarterly	01/31/14	M. Thomas	●			
	Launch a SharePoint suggestion box	01/31/14	M. Thomas	●			
Implement LHC workforce planning	Target recruiting efforts to attract applicants with special skills and expertise when needed to back-fill specialized positions	11/30/13	M. Thomas	●			
	Utilize the performance evaluation system and quarterly in-service status updates to clearly and candidly communicate performance expectations to staff	01/31/14	M. Thomas	●			
	Implement a succession planning tool that identifies all positions, promotional or lateral opportunities, potential for turnover, and back-fill options	02/28/14	M. Thomas	●			

Address Affordable Housing Needs

GOAL 1 - Increase and Preserve Affordable Housing Opportunities for:

- Low- and Moderate- Income Households
- Underserved Households
- Vulnerable Households

Low- to Moderate- Income Households

Expand and maintain the supply of housing stock

- Promote the development of affordable housing in areas previously underserved by the LHC.
- Preserve existing homes.**

Leader: B. Sweazy Performance Measure:	Original Target Date	% Complete	Activity	Next Steps
Design an in-house rehab program under the Homeowner Repair Department	12/31/13	100%	LHC/OCD have confirmed with HUD that our use of D-CDBG for rehab program can continue if using the NRPP Action Plan	Bring on 2 contract staff and assign 2 in house staff to implement the program. Release NOFA in May 2014
Implement the RAD Program, with identified financial and technical resources, with PHAs	3/31/14	100%	LHC released an RFQ establishing a list of developers that we have vetted. We have launched our Risk Sharing Program. Along with HUD and the technical assistance provider, LHC is working to implement their long-term redevelopment plan.	Continue working with HUD and TA providers to incorporate RAD incentives in our upcoming QAP and NOFAs. Market our Risk Sharing program and provide TA to partners.

- Provide homeownership education.

Leader: B. Sweazy Performance Measure:	Original Target Date	% Complete	Activity	Next Steps
Establish a referral network by partnering with at least two (2) major organizations such as Neighborworks of America and Volunteers of America.	3/31/14	100%	We have hired a Homebuyer Education Coordinator to manage LHC's day to day counseling programs. LHC is partnering with Neighborworks and Money Management International to provide homebuyer education in rural areas and hard to serve locations.	Complete the RFQ selection of LHC's approved homebuyer education agencies.

Improve the Quality of Life

- A. Create and promote healthy and supportive living environments.
- B. Link households to supportive services tailored to improving education, economic growth and employment opportunities.**

<u>Leader: B. Sweazy</u> Performance Measure:	Original Target Date	% Complete	Activity	Next Steps
Hold community outreach with non-profits and state agencies to link 50 households to services each quarter	03/31/14	100%	CHDO Quarterly Meetings, HOME Training, Tax Credit Underwriting and Asset Management,	

Underserved Households

Target resources to serve underserved populations

- A. Increase underserved households' awareness of LHC and our available products.**

<u>Leader: L. Wallace</u> Performance Measure:	Original Target Date	% Complete	Activity	Next Steps
Market LHC's services (LIHEAP, WAP, Rehab, etc.) by visiting churches and businesses in underserved communities to achieve a cumulative 25% increase in service requests.	03/31/14	0%	LHC staff has not had an opportunity to further market the energy programs due to transitioning these programs in-house. However, the local CAAs that we partner with continue to perform outreach. Also, the demand of the WAP and LIHEAP programs outweigh the funding received. LHC will work toward communicating the changes that have occurred with not outsourcing these programs so that clients are aware of who to contact outside of the CAAs should further assistance be required.	To continue transitioning the energy programs in-house and meet the demands of those programs. To finalize the NOFA for release for the Homeowner Rehab Program.

Leader: B. Sweazy Performance Measure:	Original Target Date	% Complete	Activity	Next Steps
Target non-profits, for profits and units of local government in 13 rural parishes to deliver Homeowner Rehab services to the clients.	01/31/14	100%	LHC is providing HOME funds with a set-aside for the 13 Parishes.	Align HOME NOFA with Housing Needs Assessment. Prepare and release a HOME homeowner rehab NOFA by 12/31/14.
Create a unified intake process that refers clients across all applicable programs (i.e. LIHEAP clients to the WAP Program, WAP clients to the Homeowner Rehab program and/or USDA, Federal Home Loan Bank or other community programs, etc.).	01/31/14	100%	Homeowner repair program NOFA	

B. Create education, job training programs, employment and career opportunities targeted at underserved populations.

Leader: B. Sweazy Performance Measure:	Original Target Date	% Complete	Activity	Next Steps
Comply with the Hudson and Veterans Initiatives by implementing a 20% contract goal	03/31/14	80%	Hudson Initiative language is being placed in RFPs as long as there is no conflict with federal regs associated with the particular funding source.	Because implementation is primarily a component of Procurement, this performance measure should be shifted to the CAO.

Vulnerable Households

Increase Supportive Housing

A. Increase the number of Permanent Supportive Housing (PSH) Units.
 B. **Decrease wait time for placement into PSH units.**

Leader: N. Sweazy Performance Measure:	Original Target Date	% Complete	Activity	Next Steps
Decrease service eligibility determination time to 10 days from a baseline of 21 days.	02/28/14	5%	Still working on the full implementation of Magellan as the administrator of the PSH services - issues currently exist with their tracking and reporting system.	The 2/28/14 deadline was very aggressive given all the DHH/Medicaid challenges. Will continue to work closely with Magellan and DHH to ensure the service eligibility time frame is reduced. There are ongoing weekly meetings to address this issue.

C. Increase the amount of homeless prevention and rapid re-housing opportunities offered.

Address Communities' Housing Needs

GOAL 2 – Work with communities to use affordable housing to Support Strong, Viable Communities through:

- Implementing Effective State Housing Policy
- Identifying Housing Needs
- Affirmatively Furthering Fair Housing

Effective State Housing Policy

Leverage, Integrate and Enhance Funding Resources

- A. Reduce foreclosures and evictions.
- B. Maintain an adequate supply of affordable housing.**

Leader: K. Cunningham Performance Measure:	Original Target Date	% Complete	Activity	Next Steps
Institute a penalty provision for projects found out of compliance with the goal of reducing the length of days a project is out of compliance by 50%.	02/28/14	0%	The penalty is considered a fee under the law and may require legislative action.	Identify number of projects out of compliance and time of noncompliance. Determine the proper method to assess a penalty; either through assessment of additional fee for additional compliance work. Or work with funding announcement that deducts points based on nature of non-compliance issue.
Establish a complete asset management system to assess the viability of the current stock and determine if aging properties should be rehabbed or replaced.	03/31/14	50%	Identifying complete LHC portfolio. Draft letter to extended use properties to discuss plans.	Assign individual compliance staff to review each project and create project portfolio.

- C. Identify and address blight.

Synchronize Local, Regional, and State Efforts to Address Homelessness

- A. Reduce chronic homelessness.
- B. Align the available resources to maximize the number of people assisted.
- C. Raise awareness of available resources and issues faced by people who are homeless.**

Leader: N. Sweazy Performance Measure:	Original Target Date	% Complete	Activity	Next Steps
Work with the nine (9) CoCs and the LSNDC to develop a coordinated intake and assessment tool	12/31/13	100%	Through the Chronic Homeless Policy Academy the 9 CoCs agreed to use the VI/SPDAT as the statewide coordinated intake and assessment tool.	N/A
Elevate awareness of the plight of homelessness through targeted outreach to local and state elected officials, heads of housing authorities, and other stakeholders	1/31/14	100% - ongoing	Presented at 10 meetings and conferences statewide and engaged PHAs in creating preferences for the chronically homeless	Will continue to provide quarterly updates.

- D. Serve as the state clearinghouse for information on services, housing, and transportation options for the homeless.

E. Activate the Housing and Transportation Planning and Coordinating Commission (HTPCC).

Leader: N. Sweazy Performance Measure:	Original Target Date	% Complete	Activity	Next Steps
Actively engage 51% of the HTPCC members to create a productive and synergistic commission.	12/31/13	5%	Fred and Tammy met with Cabinet heads to begin the engagement process.	Work to set up the second meeting a few weeks after the legislative session ends. Will work with Tammy Woods to re-engage members. Will also complete an intern request to help launch the HTPCC.
Assign an HTPCC staff person and provide the needed staff support to accomplish the goals of the commission.	12/31/13	100%	Winona Connor and James Young will serve as staff support	N/A

Housing Needs

Assess Current and Future Housing Needs

- A. Review housing and related needs of state, regional, and local communities.
- B. Report and analyze specific housing issues, opportunities, and impediments that include regional and local summaries.**

Leader: A. Tillman Performance Measure:	Original Target Date	% Complete	Activity	Next Steps
Identify key stakeholders, develop an agenda, and initial engagement of regional and local leaders	03/31/14	0%	Need preliminary HNA data. Will work to have the measure to 75% completion by 5/31/14.	Meet with staff to identify priority areas based on past HNA and prelim data from LSU.
Develop an interactive reporting tool to provide community level data on LHC investments	2/28/14	10%	Completion is dependent upon technology resources (possible dedicated server space) and launch of the new LHC website in June 2014.	Meet with I/T to establish technology resources required. Build a prototype to a smaller scale for testing purposes.
Launch a data and reporting repository on the LHC website	3/31/14	50%	Completion is dependent upon the date of launch of the new LHC website in June 2014. Staff is working to provide an intra-reporting repository on SharePoint.	Continue the migration of data and reports to SharePoint.

- C. Identify areas of significant economic growth and industrial investment zones in an effort to spur development of workforce housing.**

Leader: D. Hutchinson Performance Measure:	Original Target Date	% Complete	Activity	Next Steps
Provide a monthly report that identifies and updates announced economic investment in the planning districts in partnership with LED	1/31/14	30%	Met with LED Data and Research section and contact persons to identify relevant data points and sources of information vis-à-vis housing and workforce developments	Identify designated go to person at LED and Workforce Development (OWD) who will provide monthly reports/data to LHC associated with identifying high growth sectors
Partner with LED Regional Directors to develop a network of 64 statewide partners at the local levels	1/31/14	20%	The LED no longer has Regional Directors. This activity has been assigned to the local areas so the partnership will now be led by the local regional directors. LED will take a leadership role and coordinate activities in partnership with Regional Directors.	Meet with the LED Outreach Director for updates. Obtain commitments from each Regional Director to support LHC initiatives vis-à-vis Housing and Economic Development

D. Identify opportunities to address housing challenges specifically related to transportation.

Leader: D. Hutchinson Performance Measure:	Original Target Date	% Complete	Activity	Next Steps
Provide a monthly report that identifies and updates announced economic investment in the LED planning districts in partnership with DOTD and Workforce Commission	1/31/14	20%	Met with DOTD and Workforce Commission on two occasions to discuss our mission, goals and objectives. Also established a formal relationship & set up monthly meetings to track progress	Bring the 3 groups together to develop an action plan.
Partner with DOTD and to develop a network of 64 statewide partners at the local levels	1/31/14	30%	Met with DOTD Officials on 3 occasions to discuss mission and role of LHC and how we can assist citizens w/Transportation and Housing opportunities. Requested list transportation opportunities at state, regional and local levels. Develop protocol for exchanging relevant transportation data and info to assist citizens at the local level.	Meet with DOTD by end of May 2014 to acquire feedback. Contact Regional Directors individually to discuss activities of LHC and future partnerships. Propose that LHC contact each Regional Director on a monthly basis and meet with Regional Directors as a whole on a quarterly basis.

E. Maintain a housing disaster recovery toolkit and lead response and coordination efforts.

Fair Housing Initiatives

Affirmatively Further Fair Housing

A. Provide outreach and assistance to ensure compliance with state and federal fair housing laws.

Leader: K. Cunningham Performance Measure:	Original Target Date	% Complete	Activity	Next Steps
Hold one (1) annual training on Federal regulations required for recipients of LHC funds	03/31/14	50%	Several trainings sponsored by LHC in Partnership with GNOFH, LA Realtors, targeting FH.	Procure outside Consultant, have staff attend additional training on FH, Section 3, Davis Bacon etc. Working with John Ritzu of Fair Housing First to have developer centered Fair Housing Accessibility Training.

B. Eliminate impediments to fair housing.

Leader: K. Cunningham Performance Measure:	Original Target Date	% Complete	Activity	Next Steps
Coordinate a Fair Housing Focus Group of 8-10 stakeholders to examine and address policies and facilitate compliance with Fair Housing laws.	01/31/14	100%	Meeting date scheduled for April 2nd.	Generate FH Impediment Doc.
Eliminate language impediments by making the LHC website and resources available in multi-languages and for the hearing-impaired.	01/31/14	100%	Part of contract with Web Designer.	Receive Deliverable.

Increase Organizational Capacity

GOAL 3 – Sustain and Strengthen LHC through:

- Raising and Leveraging Capital
- Managing Risk
- Improving Operations

Raising and Leveraging Capital

Increase Capital Capacity

A. Maintain Aaa and A1 issuer credit ratings by Moody's.

Leader: R. Landry Performance Measure:	Original Target Date	% Complete	Activity	Next Steps
Assist in the development of a legislative financial brief to present agency position/needs to 70% (2/3rds) of legislators in both the House and Senate	12/31/13	100%	Met with Tammy to provide financial details on LHC's programs and related funding sources, as well as operational aspects of LHC.	Currently working with Administration on LHC's fee schedule to be presented to the JLBC.
Develop a Strategic Financial Plan	12/31/13	100%	Provided assistance to Government Consultants, Inc. in preparing report that was sent to Administration to use in developing programs and evaluating operations and the funding associated therewith.	Administration received the report and stated that they would reference as LHC moves forward in the development and financing of its various programs and operations.

B. Leverage and increase capital alternatives to ensure adequate support for LHC's lending programs.

C. Develop a Strategic Financial Plan.

Leader: R. Landry Performance Measure:	Original Target Date	% Complete	Activity	Next Steps
Detail available funds and potential availability for use in housing initiatives and operations	1/31/14	100%	Provided report to Administration of the amount of available funds for use in funding programs and operations.	Operating Budget process to be completed each year by June 30th.

Managing Risk

Mitigate Losses

- A. Assess delinquencies, bankruptcies, and foreclosures and implement reduction strategies.
- B. Monitor properties to ensure fiduciary responsibility, financial stability and viability.**

Leader: Dir. of Asset Mgmt. Performance Measure:	Original Target Date	% Complete	Activity	Next Steps
Prepare and implement a regular schedule for completion of 100% of the properties due for review	1/31/14	100%	Complete List of All Current LHC Projects including projects in extended use period.	QC List against HDS. Identify additional information captured in HDS or request additional information to be captured in HDS for Asset/Compliance Needs
Create an “irregularities report” that furthers the reduction of non-compliance by 10% each quarter	3/31/14	50%	Creating spreadsheet to capture and log payment of fees, audited financials and compliance monitoring	Complete the spreadsheet with complete information. Establish non-compliant procedure list.

- C. Improve and maintain physical condition of properties.**

Leader: Dir. of Asset Mgmt. Performance Measure:	Original Target Date	% Complete	Activity	Next Steps
Review 100% of the projects in the LHC portfolio and develop a non-compliant projects report	1/31/14	100%	Project list prepared. In conjunction with separate goal under Executive Counsel	Draft letter to begin process addressing severe non-compliant issues.

- D. Retain assets aging out of compliance in LHC portfolio.**

- E. Determine if additional underwriting and policy changes are required to mitigate emerging risks.**

Leader: Dir. of Asset Mgmt. Performance Measure:	Original Target Date	% Complete	Activity	Next Steps
Perform a quarterly analysis of the impact of past underwriting decisions on the condition of the LHC portfolio	3/31/14	0%	Decided to defer this until LHC hires a Director of Asset Management.	Develop a risk assessment tool.
Implement underwriting policies/modules for both Single and Multi-family development	2/28/14	30%	This process is currently underway in conjunction with developing the online application and in procurement of a Multifamily Underwriter	Develop a plan with the underwriter to train staff on the chosen model.

Expand Compliance Responsibilities

A. Monitor the significant ongoing changes in its regulatory environment, and continue to enhance LHC's regulatory compliance systems to keep fully abreast of new industry and program requirements.

<u>Leader: A. Tillman</u> Performance Measure:	Original Target Date	% Complete	Activity	Next Steps
Develop protocols to effectively monitor changes in the regulatory environment	3/31/14	100%	Staff has been assigned to monitor all housing-related policy notification outlets and prepare a weekly brief.	Compile list of regulatory changes and ensure policies and procedures are compliant before deadlines.

B. Implement new Compliance Monitoring departmental strategies and technology to improve efficiency and project management.

Improving Operations

Increase Capabilities and Efficiencies

A. Identify and implement process improvement initiatives.

<u>Leader: M. Thomas</u> Performance Measure:	Original Target Date	% Complete	Activity	Next Steps
Identify at least two (2) processes bi-annually to review, including the cost/benefit analyses for operational aspects.	02/28/14	100%	Developed process improvement protocols for processing invoices through Accounting and for managing IT software implementations	Identify at least two (2) new process improvement projects before the end of the next quarter.

B. Develop and refine eBusiness strategies and systems.

<u>Leader: D. Veals</u> Performance Measure:	Original Target Date	% Complete	Activity	Next Steps
Implement tools to generate end-user reports from systems of record	03/31/14	50%	Implemented System of record data access on MS Reporting Services for production data located in: 1) HES-LIHEAP, 2) HES-WAP, 3) HDS-MFMS, 4) HDS-Construction, and 5) AccPac	Implement System of record data access on MS Reporting Services for production data located in : 1)HDS-FMS-HOME, 2)HDS-SFMS, 3)HDS-Section8, 4)HDS-FMS-HESG, and 5)ArcGIS

C. Evaluate the feasibility of an internal loan servicing system.
 D. Develop a multi-rater feedback tool to assess partners' needs and expectations.

E. Manage all funding sources via enterprise systems of record.

Leader: M. Thomas Performance Measure:	Original Target Date	% Complete	Activity	Next Steps
Perform a Systems Architecture and Requirements Description	01/31/14	0%	Project placed on hold to allow for the onboarding of the new CAO.	Identify vendor to perform this service.

F. Continually identify opportunities to develop in-house expertise.

Leader: B. Sweazy Performance Measure:	Original Target Date	% Complete	Activity	Next Steps
Provide National Development Council (NDC) in-house training for 25 staff members	01/31/14	100%	The training was conducted in February (24-27th). 32 LHC employees were able to attend the training and take the test.	Schedule the 2nd series of NDC training by July 1, 2014.

Cultivate Human Capital
A. Define core values and align organizational culture.

Leader: F. Tombar Performance Measure:	Original Target Date	% Complete	Activity	Next Steps
Solicit input from staff to define LHC's core values	1/31/14	0%	Decided to defer this until LHC hires a Director of Public Affairs. Plan now is to complete by the end of the 1st Qtr of next fiscal year	LHC is hiring a Director of Public Affairs who will lead this effort.
Launch an internal marketing campaign, including communications standards, that rolls out the LHC brand and culture	1/31/14	0%	Decided to defer this until LHC hires a Director of Public Affairs. Plan now is to complete by the end of the 1st Qtr of next fiscal year	LHC is hiring a Director of Public Affairs who will lead this effort.

B. Improve employee morale.

Leader: M. Thomas Performance Measure:	Original Target Date	% Complete	Activity	Next Steps
Engage the MAC and EAC to launch an employee think-tank to submit recommendations for improving morale	01/31/14	0%	Impacted by the outsourcing of HR to DOA. CAO is working with DOA to develop a plan to improve employee morale.	Finalize new approach in the fourth quarter.
Initiate a job satisfaction survey and openly address the top three (3) concerns quarterly	01/31/14	50%	Impacted by the outsourcing of HR to DOA. CAO is working with DOA to develop a plan to improve employee morale.	Draft survey will be reviewed by DOA and conducted in the fourth quarter.
Launch a SharePoint suggestion box	01/31/14	0%	Impacted by the onboarding of the CAO. Developing a broader set of internal communications tools.	Pending the hire of the Director of Public Affairs, will develop and deliver initial internal communications tools before the end of the fourth quarter.

C. Implement LHC workforce planning.

Leader: M. Thomas Performance Measure:	Original Target Date	% Complete	Activity	Next Steps
Target recruiting efforts to attract applicants with special skills and expertise when needed to back-fill specialized positions	11/30/13	75%	Impacted by the outsourcing of HR to DOA. CAO working with DOA to improve recruiting efforts. Developed new protocols for specialized positions.	Continue to work with DOA/HR to refine recruiting protocols.
Utilize the performance evaluation system and quarterly in-service status updates to clearly and candidly communicate performance expectations to staff	01/31/14	50%	Impacted by outsourcing of HR to DOA. CAO working with DOA to develop a new performance evaluation system. Initial draft is under review.	Finalize new PES and provide training on the new protocols before the end of the fourth quarter.
Implement a succession planning tool that identifies all positions, promotional or lateral opportunities, potential for turnover, and back-fill options	02/28/14	5%	Impacted by outsourcing of HR to DOA. CAO working with DOA to develop succession planning strategies. Initial draft is under review.	Continue to work with DOA/HR through the implementation of a service level agreement.

Impediments to Progress

There are 9 performance indicators with zero activity. The table below captures the impediments which have caused a delay in meeting the target date.

Goal	Performance Measure	Impediments
Target resources to serve underserved populations	Market LHC's services (LIHEAP, WAP, Rehab, etc.) by visiting churches and businesses in underserved communities to achieve a cumulative 25% increase in service requests.	Time limitations due to transitioning energy programs in-house. In addition, the demand of the WAP and LIHEAP programs out- weigh the funding received.
Leverage, Integrate and Enhance Funding Resources	Institute a penalty provision for projects found out of compliance with the goal of reducing the length of days a project is out of compliance by 50%.	May require legislative action.
Assess current and future housing needs	Identify key stakeholders, develop an agenda, and initial engagement of regional and local leaders	Pending preliminary HNA data.
Mitigate losses	Perform a quarterly analysis of the impact of past underwriting decisions on the condition of the LHC portfolio	Decided to defer this until LHC hires a Director of Asset Management.
Increase capabilities and efficiencies	Perform a Systems Architecture and Requirements Description	Project placed on hold to allow for the onboarding of the new CAO.
Cultivate human capital	Solicit input from staff to define LHC's core values	Decided to defer this until LHC hires a Director of Public Affairs. Plan now is to complete by the end of the 1st Qtr of next fiscal year.
	Launch an internal marketing campaign, including communications standards, that rolls out the LHC brand and culture	Decided to defer this until LHC hires a Director of Public Affairs. Plan now is to complete by the end of the 1st Qtr of next fiscal year.
	Engage the MAC and EAC to launch an employee think-tank to submit recommendations for improving morale	Impacted by the outsourcing of HR to DOA. CAO is working with DOA to develop a plan to improve employee morale.
	Launch a SharePoint suggestion box	Impacted by the onboarding of the CAO. Developing a broader set of internal communications tools.

2013-2016 Strategic Plan

Strategic Priority	Address Affordable Housing Needs	Address Communities' Housing Needs	Increase Organizational Capacity
Goals	<p><u>GOAL 1</u> - Increase and Preserve Affordable Housing Opportunities for:</p> <ul style="list-style-type: none"> • Low- and Moderate- Income Households • Underserved Minority Households • Vulnerable Households 	<p><u>GOAL 2</u> – Work with communities to use affordable housing to Support Strong, Viable Communities through:</p> <ul style="list-style-type: none"> • Implementing Effective State Housing Policy • Identifying Housing Needs • Affirmatively Furthering Fair Housing 	<p><u>GOAL 3</u> – Sustain and Strengthen LHC through:</p> <ul style="list-style-type: none"> • Raising and Leveraging Capital • Managing Risk • Improving Operations
Objectives	<p>Low- to Moderate- Income Households</p> <ol style="list-style-type: none"> 1. <u>Expand and maintain the supply of housing stock</u> <ol style="list-style-type: none"> A. Promote the development of affordable housing in areas previously underserved by the LHC B. Preserve existing homes C. Provide homeownership education 2. <u>Improve the Quality of Life</u> <ol style="list-style-type: none"> A. Create and promote healthy and supportive living environments B. Link households to supportive services tailored to improving education, economic growth and employment opportunities <p>Underserved Households</p> <ol style="list-style-type: none"> 3. <u>Target resources to serve underserved populations</u> <ol style="list-style-type: none"> A. Increase underserved households' awareness of LHC and our available products B. Create education, job training programs, employment and career opportunities targeted at underserved populations <p>Vulnerable Households</p> <ol style="list-style-type: none"> 4. <u>Increase Supportive Housing</u> <ol style="list-style-type: none"> A. Increase the number of Permanent Supportive Housing (PSH) Units B. Decrease wait time for placement into PSH units C. Increase the amount of homeless prevention and rapid re-housing opportunities offered 	<p>Effective State Housing Policy</p> <ol style="list-style-type: none"> 1. <u>Leverage, Integrate and Enhance Funding Resources</u> <ol style="list-style-type: none"> A. Reduce foreclosures and evictions B. Maintain an adequate supply of affordable housing C. Identify and address blight 2. <u>Synchronize Local, Regional, and State Efforts to Address Homelessness</u> <ol style="list-style-type: none"> A. Reduce chronic homelessness B. Align the available resources to maximize the number of people assisted C. Raise awareness of available resources and issues faced by people who are homeless D. Serve as the state clearinghouse for information on services, housing, and transportation options for the homeless E. Activate the Housing and Transportation Planning and Coordinating Commission (HTPCC) <p>Housing Needs</p> <ol style="list-style-type: none"> 3. <u>Assess Current and Future Housing Needs</u> <ol style="list-style-type: none"> A. Review housing and related needs of state, regional, and local communities B. Report and analyze specific housing issues, opportunities, and impediments that include regional and local summaries C. Identify areas of significant economic growth and industrial investment zones in an effort to spur development of workforce housing D. Identify opportunities to address housing challenges specifically related to transportation E. Maintain a housing disaster recovery toolkit and lead response and coordination efforts <p>Fair Housing Initiatives</p> <ol style="list-style-type: none"> 4. <u>Affirmatively Further Fair Housing</u> <ol style="list-style-type: none"> A. Provide outreach and assistance to ensure compliance with state and federal fair housing laws B. Eliminate impediments to fair housing 	<p>Raising and Leveraging Capital</p> <ol style="list-style-type: none"> 1. <u>Increase Capital Capacity</u> <ol style="list-style-type: none"> A. Maintain Aaa and A1 issuer credit ratings by Moody's B. Leverage and increase capital alternatives to ensure adequate support for LHC's lending programs C. Develop a Strategic Financial Plan <p>Managing Risk</p> <ol style="list-style-type: none"> 2. <u>Mitigate Losses</u> <ol style="list-style-type: none"> A. Assess delinquencies, bankruptcies, and foreclosures and implement reduction strategies B. Monitor properties to ensure fiduciary responsibility, financial stability and viability C. Improve and maintain physical condition of property D. Retain assets aging out of compliance in LHC portfolio E. Determine if additional underwriting and policy changes are required to mitigate emerging risks <p>Expanding Compliance Responsibilities</p> <ol style="list-style-type: none"> 3. <u>Expand Compliance Responsibilities</u> <ol style="list-style-type: none"> A. Monitor the significant ongoing changes in its regulatory environment, and continue to enhance LHC's regulatory compliance systems to keep fully abreast of new industry and program requirements B. Implement new Compliance Monitoring departmental strategies and technology to improve efficiency and project management <p>Improving Operations</p> <ol style="list-style-type: none"> 4. <u>Increase Capabilities and Efficiencies</u> <ol style="list-style-type: none"> A. Identify and implement process improvement initiatives B. Develop and refine eBusiness strategies and systems C. Evaluate the feasibility of an internal loan servicing system D. Develop a multi-rater feedback tool to assess partners' needs and expectations E. Manage all funding sources via enterprise systems of record F. Continually identify opportunities to develop in-house expertise <p>Cultivating Human Capital</p> <ol style="list-style-type: none"> 5. <u>Cultivate Human Capital</u> <ol style="list-style-type: none"> A. Define core values and align organizational culture B. Improve employee morale C. Implement LHC workforce planning