

## MEMORANDUM TO HOC COMMISSIONERS

**From:** Public Works LLC  
**Re:** HOC's Five-Year Strategic Plan  
**Date:** October 24, 2023

We are at the final stages of the development of HOC's Five-Year Strategic Plan.

This process began with the issuance of a Request for Proposals and a competitive bidding process leading to the selection of Public Works as consultant to facilitate the update of HOC's Strategic Plan for the next five years. The RFP and the Commission's approval of Public Works as the selected consultant specified that the planning process would be divided into two phases. The first phase would include stakeholder and public engagement and extensive internal and external research and leading to the development of a high-level Strategic Plan outlining the agency's Mission, Vision, Core Values and key Goals and Objectives for the next five years. This would be followed by a second phase to develop a much more detailed Implementation Plan, which would include the actions steps, metrics, dashboards, and reporting process to track the implementation of the Goals and Objectives decided in the Strategic Plan.

Public Works kicked off Phase 1 in May 2023, beginning an intense period of research, information gathering and stakeholder and community engagement. From May through July, we conducted 30 Key Informant Interviews among thought leaders, policy makers, county officials and practitioners in housing-related matters. Insights gathered from these interviews helped frame the development of five Focus Groups (Seniors and Persons with Disabilities, Persons from the Immigrant Community, Persons from the Hispanic Community, Persons from the Black or African American Community, Persons on the Housing Path Wait List), two Town Halls (one live, one virtual) and Surveys among the General Public and HOC Customers (350 respondents and 1,725 respondents, respectively). Spanish-language translation was provided for the Focus Groups, Town Halls and Surveys. A Strategic Planning website was developed and hosted by HOC during the stakeholder engagement process to encourage people to attend the town halls and complete the surveys. All told, nearly 2,400 community voices were heard and considered. In addition, 130 HOC staff members completed an agency-wide survey on the Housing Opportunities Commission's mission, services, policies, and operations.

Secondary research was conducted into HOC and Montgomery County operations and background statistics, national best-practices and comparable programs of peer housing authorities. A 100-page Evaluative Report was provided to the Commission in August summarizing these findings and providing roughly 90 potential policy recommendations for addressing the various issues raised by the research and stakeholder engagement. An all-day workshop was held with HOC senior staff to review all these materials and to synthesize from them possibilities for Vision, Mission and Values statements. These findings were presented to the Commission at an all-day retreat in August at which Commissioners discussed them at length and provided crucial input and direction.

Following that retreat, we produced draft Vision and Mission Statements, Values and Strategic Goals and a detailed proposed outline of the Strategic Plan. We have circulated that outline to Commissioners and key HOC stakeholders and refined it further. Before beginning to draft a full Strategic Plan, we have scheduled two work sessions with the Commission to review this draft outline. To help organize the Commission's discussion, we have divided the Outline into key decision points below.

# 1. What should HOC's Vision Statement be?

HOC's current Vision Statement is:

It is our vision that everyone should live in quality housing that is affordable, with dignity and respect. At HOC we believe this vision can be achieved by ensuring amenity rich, community-connected housing for all of Montgomery County's residents where all people can reach their fullest potential. We believe supportive programs, delivered through mission-aligned partnerships, help our customers improve their economic status, remain stably housed and reach the goals they hold for themselves and their families.

Public Works proposes:

Futures start and grow in a place called home; it's why we're making it affordable, while empowering individuals, families, and neighborhoods to prosper.

Commissioners Kelleher and Merkowitz both suggested an alternative:

A Montgomery County in which all residents have access to safe, affordable, and quality housing and the attendant services they need to thrive.

# 2. What should HOC's Mission Statement be?

HOC's current Mission Statement is:

The Mission of the Housing Opportunities Commission is to provide affordable housing and supportive housing services that enhance the lives of low- and moderate-income families and individuals throughout Montgomery County, Maryland so that:

- No one in Montgomery County lives in substandard housing;
- We strengthen families and communities as good neighbors;
- We establish an efficient and productive environment that fosters trust, open communication and mutual respect; and
- We work with advocates, providers and community members to maintain support for all of the work of the Commission.

Public Works proposes:

Our mission is to deliver innovative, socially and economically inclusive housing where families of all incomes can live, work, and thrive together. We strengthen low- and moderate-income families by offering opportunities for personal and economic growth through partnerships and our supportive services.

Commissioner Kelleher suggests:

HOC exists to provide low- and moderate-income persons the opportunity to live in quality, safe and affordable housing in Montgomery County.

### 3. What should HOC's Core Values be?

HOC does not currently have separately formulated Core Values, they are integrated into the existing Vision and Mission Statements.

Based on feedback from Commissioners, customers, applicants, staff, and the public, Public Works proposes the following seven Core Values:

1. **People-First with Dignity & Respect | Our Customers:** We believe our customers are front and center in everything we do as we create and foster opportunities for them to secure affordable, safe and high quality housing. We aspire to provide outstanding customer service through caring, listening, communicating, partnering, and timely responding to our customers' needs, concerns, and insights.
2. **People-First with Dignity & Respect | Our Staff:** We believe our staff is our most valuable asset in fulfilling our vision and mission. We provide our teams with the resources and support needed to excel in their performance and roles while making HOC a competitive, great place to work and thrive.
3. **Innovative and Entrepreneurial:** We believe that addressing the severe shortage of affordable housing will require agility, innovative partnerships, adoption of state-of-the-art technologies, and nationally acclaimed financial tools that create a robust portfolio of housing opportunities that incentivize resident economic mobility.
4. **Equity in Everything We Do:** We believe that equitable access to quality, safe, and affordable housing enables people to live with the security and comforts of home, experience community, and generate intergenerational wealth. We recognize that systemic and institutional inequities pose substantial barriers and hardships for communities of color. We commit to addressing these barriers as they impact our customers while embracing diversity, equity, and inclusion in our organization's culture.
5. **Power of Partnerships:** We believe in collaborating with community-based, public and private sector organizations to provide resources and services that empower our residents to reach their full potential, secure and maintain housing, and achieve economic independence.
6. **Community-Enhanced Housing:** We believe that when we develop, construct, and renovate properties, we are also building community and supporting sustainable neighborhoods. We cultivate social interaction among neighbors rather than isolate vulnerable households within pockets of concentrated poverty through mixed-income development. This philosophy runs deep in everything that we do.
7. **Stewardship:** We believe we have been entrusted to wisely manage and deploy valuable resources to create and maintain environmentally sustainable affordable housing throughout Montgomery County. We respect the public's trust by being results-driven, accountable, and transparent in our efforts and operations while employing strategies to assure the financial solvency of HOC.

## **4. What should HOC's Strategic Goals be?**

Public Works proposes three priority areas for HOC to focus on in the next five years. Underneath each Strategic Goal, Public Works proposes a small number of key objectives. The Implementation Plan would expand on these Goals and Objectives by developing incremental action steps and metrics to implement and track them.

Public Works proposes the following three Strategic Goals:

- I. EXPAND Affordable Housing in Montgomery County**
- II. ENHANCE the Lives We Touch**
- III. EXCEL as a World-Class Organization**

## **5. Under Goal I: EXPAND Affordable Housing in Montgomery County, what should the key objectives be?**

Public Works proposes the following eight objectives to achieve the Goal of Expanding Affordable Housing in Montgomery County:

- A. Maintain HOC's financial capacity**
- B. Establish defined priorities for development, purchase & investment**
- C. Expand capital and financing for affordable housing**
- D. Expand affordable housing through creative financing and proactive maintenance, renovation and preservation**
- E. Make rental assistance go further and serve more people**
- F. Work with governmental partners to develop, advocate, and implement policies and legislation that support regional and local housing goals, expand housing generally, increase the stock of affordable housing, and expand housing funding.**
- G. Address the changing demographics of Montgomery County by creating more units for larger households and creating more units for the aging population and those with mobility challenges**
- H. Ensure HOC efforts further racial equity in the County and reduce the racial wealth gap**

## **6. Under Goal II: ENHANCE the Lives We Touch, what should the key objectives be?**

Public Works proposes the following five objectives to achieve the Goal of Enhancing the Lives We Touch:

- A. Improve wait list management**
- B. Increase customer homeownership**
- C. Increase resident ability-to-pay through programs that reduce costs such as utilities and transportation, and programs and partnerships aimed at helping customers increase their income**
- D. Enhance resident services**
- E. Improve customer interactions across the agency**

## **7. Under Goal III: EXCEL as a World-Class Organization, what should the key objectives be?**

Public Works proposes the following four Objectives to achieve the Goal of Excelling as a World-Class Organization:

- A. Strengthen internal data systems**
- B. Ensure that HOC is a world-class place to work so we can attract and retain staff**
- C. Ensure programmatic decisions and undertakings match actual HOC capacity**
- D. Ensure that internal HOC policies and practices further diversity, equity and inclusion**