



# Strategic Plan

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**2023 - 2025**

**Board Approved: January 24, 2023**

DHIC envisions a housing ecosystem that provides and promotes equity, generational wealth, health and wellness for all of the communities in which we work.

Stable affordable housing is a platform upon which individuals, families and seniors can live their best lives.

We have seen through our work, especially in targeted communities such as The Village at Washington Terrace and Beacon Ridge, that thoughtfully designed affordable housing with appropriate support services and engagement improves physical and mental health, financial wellbeing; increases choices, as well as improves academic performance, and supports caregiving and parenting. ***Housing becomes a path to a better life.***

**Our aim in this 2023-2025 Strategic Plan\* is to increase DHIC's capacity across all business lines to build and operate thriving stable affordable communities that truly center residents and homeowners' needs and create pathways and opportunities for them to thrive.** Continuing to preserve and increase the supply of new affordable communities in the region and state remains a priority and production metrics are included in our annual business operating plan. This plan integrates more fully DHIC's award winning housing production and operating work with a sharpened focus on resident needs and building holistic thriving communities.

\*DHIC developed this 3-year strategic plan with an expanded process of both internal team and external stakeholder input and participation, guided and supported by HIGOL.

## Our Strategic Goals

Our aim with this plan dovetails with our desire to institutionalize our Race, Equity, Diversity and Inclusion (REDI) work so it is part of the fabric of how we do business. A REDI assessment completed in 2022 by CounterPart Consulting identified six key opportunities for us to do this. An especially critical opportunity is to center the needs of residents and community members we serve in all that we do. As of 2021, 78% of residents living in DHIC properties and community members served by the DHIC's Homeownership Center were people of color and low income.

**As a result, Centering Residents and Community Members is one of our four Strategic Goals.** We envision improved property management and expanded resident support across our entire portfolio as well as expanded services at the Homeownership Center that will empower all residents to improve their financial health and capacity for wealth building, whether they are seeking to purchase a home or not.

**During the planning process, many of our partners helped us recognize a special opportunity to become more strategic and intentional in advocating for public policy that supports our aims, and as such it became a Strategic Goal.**

We will spend 2023 studying and recommending ways for DHIC to play a much stronger role in creating positive policy changes for the affordable housing ecosystem in North Carolina.

**The last two goals are equally important. We seek to strengthen internal systems for decision making, supporting transparency, greater efficiencies, and improved communication across business lines to better support housing production, asset and property management, and resident services. We aim to raise enterprise level capital to execute on our vision.**

We invite you to join us on this journey of making our communities more sustainable, equitable and welcoming for all.<sup>3</sup>

The shortage of safe, affordable, well-maintained housing continues to be a crisis across the US and the state of North Carolina, but is especially acute in the Triangle Region. DHIC has worked hard to address this shortage having developed close to 3,000 affordable homes across nine counties in N.C. with most concentrated in six counties that are a part of the metropolitan Triangle Region. We currently have site control and plans enabling us to construct an additional 927 affordable homes over the next few years, plus we have additional plans to recapitalize and rehabilitate 534 older apartments in our portfolio ensuring their long-term viability.

In an already challenging market, the population in the Triangle is projected to increase by 75% from 2020- 2027 (Source: NC Office of State Budget & Mngt). Rapid population growth in the region has resulted in rents escalating 12% per year on average across both the Wake-Cary and Durham-Chapel Hill MSAs in 2021 and 2022. (Source: Apartment List) Although this may moderate in 2023, strong projected job and population growth over the next three years will continue to put intense pressure on both the housing supply (simply more people than homes available) and its affordability.

Pressure is even greater on low-income communities and communities of color, as wages have not risen at the same pace as cost increases for housing. In the Triangle counties of Wake, Durham, Chatham, Orange and Johnston, 41 to 48% of all households are considered cost burdened, paying more than 30% of their income for housing. (Source: US Census) At the same time there is a risk of job losses in the coming year as a moderate recession is projected for the N.C. and US economy. Again, low wage workers are often first to feel the effects of lay-offs and economic tightening.

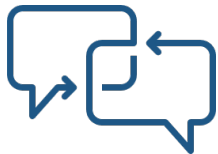
***DHIC's work has never been more important or relevant.***



DHIC engaged in a comprehensive, multi-phase process to develop this three-year strategic plan that is inclusive of voices across internal and external stakeholder groups. It was also designed to create a structure to increase cross-functional collaboration across business lines. Three teams within DHIC were formed to create the plan including a Coordinating/Admin team, Core Leadership team (including leaders across business lines) and Goal Teams. The Core Leadership Team including two senior leaders from each business line. Goal teams included all team members and were deliberately constructed to be cross-functional and inter-departmental. At least one Core Team member was assigned to each Goal Team to enable healthy feedback loops on action plan work.

The teams engaged in this process over six months beginning with a comprehensive analysis of internal and external stakeholder feedback, followed by strategic design by the Core Leadership Team and Board of Directors and informed by stakeholder input and business line planning frameworks. Goal Teams then aligned with areas of strategic focus to create a comprehensive and cross-functional action plan to execute DHIC’s strategic goals.

### STAGES OF THE PROCESS:



Discovery and  
Stakeholder  
Input



Strategic  
Design



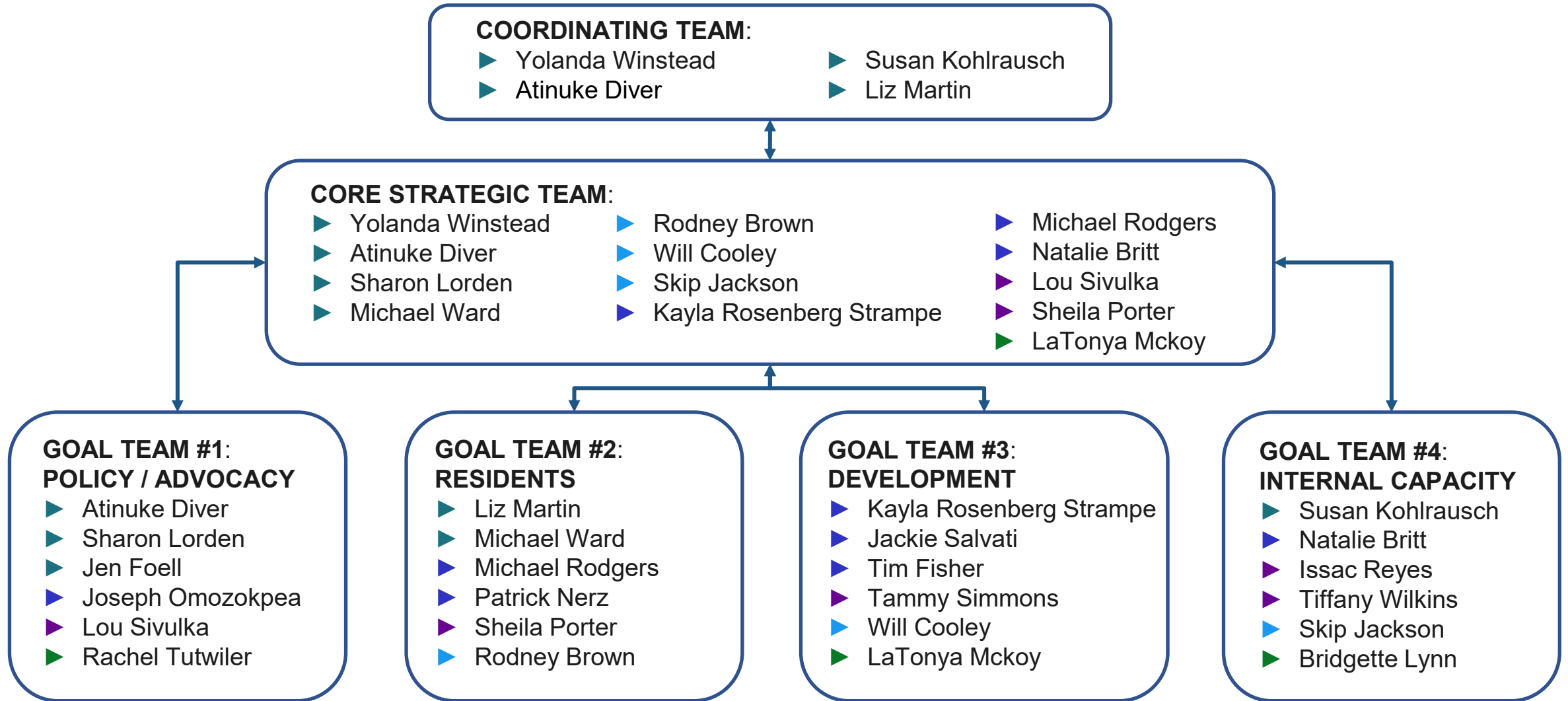
Collaborative  
Solution  
Development



Roll Out and  
Execution

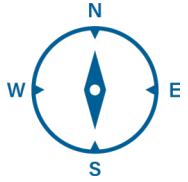


Measurement  
and Continuous  
Improvement



HIGOL team members were present for all of the meetings across the different teams to help guide the process.

**KEY:** ▶ Administration    ▶ Homeownership Center    ▶ Resident Services    ▶ Asset Management    ▶ Real Estate Development



- ▶ Develop clear shared values and a vision for the DHIC of the future.
- ▶ Identify how DHIC makes the most of its social, political, and financial capital to positively impact old patterns of race and income inequality across the community and transform lives.
- ▶ Develop a compass for the organization to more easily make decisions about which opportunities to pursue and which to decline.
- ▶ Gain clarity and buy-in across teams and the board on the strategies and timing needed to meet the vision and mission.
- ▶ Empower teams to collaborate to successfully accomplish goals and objectives.
- ▶ Develop and strengthen external community partnerships to ensure DHIC is best positioned to meet community impact goals.



The Goal Teams will meet monthly throughout 2023 as they execute their plans to keep one another abreast of progress and support one another in overcoming any hurdles along the way.

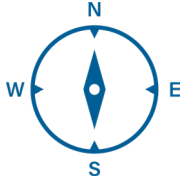
Teams will brief the Core Strategic Team quarterly on progress towards key milestones and measures to gauge progress and keep momentum through the year.

## **OUTCOMES:**

A three-year strategic plan reflecting a vision for the DHIC of the future that is:

- ▶ Aligned with stakeholder input and clear shared values.
- ▶ Supported by a strategic action plan.
- ▶ Executed through cross-functional teams that are aligned with each of the strategic goals.
- ▶ Inclusive of key milestones and measures to gauge progress.

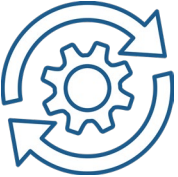




## PURPOSE:

Solicit input from internal and external stakeholders to identify opportunities and build consensus.

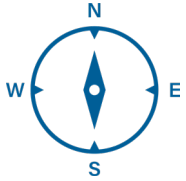
## PROCESS:

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- ▶ Online surveys focused on mission & strategy, support & collaboration, partnership & engagement, culture & values, and community impact were sent to:
    - The DHIC employee team: 25 Responses
    - The DHIC Board of Directors: 7 Responses
    - Leadership of external stakeholder organizations: 12 Responses
    - Residents and clients: 13 Responses
  - ▶ Four 75-minute focus groups were held with:
    - Employees
    - Board of Directors
    - Residents and Clients
    - Stakeholder organizations
  - ▶ Follow-up 45-minute interviews were then held with select individuals from these groups
  - ▶ Comprehensive market research was conducted across DHIC's 13-county service area



## OUTCOMES:

A comprehensive report detailing overall sentiment across internal and external stakeholders, key themes, barriers, and areas of opportunity for DHIC to consider in the strategic planning session .



## PURPOSE:

Construct the overall strategic framework to support intentional growth over the next three years.

## PROCESS:

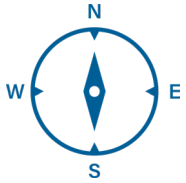


- ▶ Kolbe A Assessments and individual debriefs for the Core Strategic Team.
- ▶ 1.5 day Strategy Session where the Core Strategic Team:
  - Reviewed team Kolbe results and explored leveraging strengths as a team.
  - Considered stakeholder input
  - Aligned on vision, mission, and values.
  - Defined four high-level strategic goals and draft supporting objectives.
- ▶ Board of Directors briefing and working session where the CEO and key Executive Team members:
  - Gathered feedback on and refined the vision, mission, values, strategic goals, and objectives.
  - Ensured clarity, consensus, and ownership across top leadership.



## OUTCOMES:

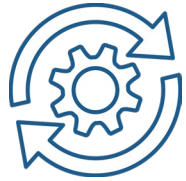
The framework for the three-year strategic plan including vision, mission, and values as well as four high-level strategic goals with draft objectives for cross-functional goal teams to refine and execute on.



## PURPOSE:

Align cross-functional goal teams with the strategic goals and objectives defined through the strategic design phase to define action plans for accomplishing the goals spanning across the organization.

## PROCESS:

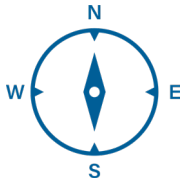


- ▶ Goal Teams were formed and trained on:
  - Collaborative and effective meetings.
  - Goal Team roles and responsibilities.
  - Tools for refining objectives, creating action plans, and defining key milestones.
- ▶ Goal Team Charters and Action Plans were drafted over the course of two meetings.
- ▶ Draft Charters and Action Plans were presented to the Core Strategic Team for feedback.
- ▶ Goal Teams incorporated feedback and finalized Charters and Action Plans in a final meeting



## OUTCOMES:

Strategic Action Plan for each goal with clear objectives and milestones for the first year of the plan. Action plans for subsequent years will be developed for those years based on progress and lessons learned from the previous year.

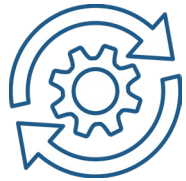


## PURPOSE:

Execute on the 2023 Goal Team Action Plans with a clear feedback loop and communication cadence across the organization.

## PROCESS:

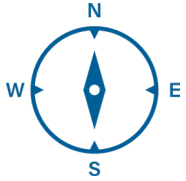
- ▶ Kick-off meeting with full DHIC staff to align on:
  - Ongoing feedback loop.
  - Communications plan implementation.
- ▶ Teams administer baseline measurements.
- ▶ Goal Teams meet monthly over the course of 2023 to:
  - Review progress and celebrate wins.
  - Share feedback.
  - Identify obstacles and plan to overcome them.
- ▶ Goal Teams brief the Core Strategic Team on a quarterly basis to:
  - Review progress and celebrate wins.
  - Reconfirm priorities and adjust the plan as needed.
  - Seek support overcoming obstacles as needed.
- ▶ Celebration with full DHIC staff.



## OUTCOMES:

Goal Team milestones are completed collaboratively with support from across the organization and in alignment with the priorities set by the Core Strategic Team .

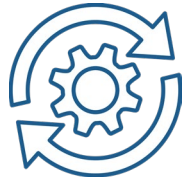




## PURPOSE:

Conduct continuous process improvement through ongoing measurement and documentation of lessons learned.

## PROCESS:



- ▶ Monthly scheduled check-ins with the Coordination Team over six months.
- ▶ Re-administer measurement tools where applicable.
- ▶ Conduct an After-Action Review to formalize institutional knowledge and key take-aways such as:
  - What went well?
  - What could be done better next time?
  - What commitments are we making to maintain momentum?
- ▶ Determine ongoing measurements to be captured.



## OUTCOMES:

Ongoing documentation of lessons learned and key measures to maintain momentum and continually improve processes in support of accomplishing the 2023 – 2025 strategic plan.



## **Vision**

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**We envision a housing ecosystem that provides and promotes equity, generational wealth, health, and wellness for the communities in which we work.**



## **Mission**

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**DHIC supports individuals, families, and seniors by providing homes and opportunities that promote the financial, physical, and mental well-being of people and communities.**



## Values

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- ▶ **Compassion**
- ▶ **Respect**
- ▶ **Honesty + Integrity**
- ▶ **Innovation + Creativity + Futuristic + Evolving**
- ▶ **Passion for the work and service**
- ▶ **Collective Communication**
- ▶ **Equity**





## **Strategic Goal #1**

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**Amplify the priorities, interests, and concerns of neighbors of modest means in NC communities to change, expand, strengthen, and secure housing, development, and policies that heal the harms of systemic oppression and support the work & lives of residents, clients, community partners and DHIC.**

Amplify the priorities, interests, and concerns of neighbors of modest means in NC communities to change, expand, strengthen, and secure housing, development, and policies that heal the harms of systemic oppression and support the work & lives of residents, clients, community partners and DHIC.

### Team Structure

**Core Team Sponsor(s):** Sharon Lorden, Atinuke Diver, Lou Sivulka

**Goal Team Lead:** Rachel Tutwiler

**Goal Team Participants:** Joseph Omozokpea and Jennifer Foell

### Key Milestones

### Objectives

Key Milestones		Objectives
<b>Milestone #1</b> Initial assessment team is formed as a BOD and staff joint effort based on interest level and leadership input.	<b>By When</b> End Q1	<b>Objective #1</b> Seek engagement of stakeholders, partners, and residents to reflect their needs and desires for inclusive thriving communities.
<b>Milestone #2</b> Draft Internal Advocacy Inventory detailing where skills, resources, and interests are to illustrate a clear picture of current state.	<b>By When</b> End Q2	
<b>Milestone #3</b> Draft External Partnership Inventory detailing current and potential partnerships and key impact areas.	<b>By When</b> End Q3	<b>Objective #2</b> Create a DHIC policy plan through an advocacy lens.
<b>Milestone #4</b> Using information gathered through inventory work, provide recommendations and next steps around advocacy capacity and priorities.	<b>By When</b> End Q4	<b>Objective #3</b> Develop strong partnerships and coalitions with external partners to take action and leverage resources in alignment with the plan.

	Key Activities	Support & Consult	Milestones
Q1	<ul style="list-style-type: none"> <li>Identify initial assessment team.</li> <li>Form initial assessment team.</li> <li>Begin internal advocacy inventory (survey of BOD and staff to understand current state of skills, resources, and interests).</li> <li>Share advocacy training opportunities across staff and board.</li> </ul>	<ul style="list-style-type: none"> <li>Leadership Team</li> <li>Board and Staff</li> <li>Initial Assessment Team</li> <li>Liz and Yolanda</li> </ul>	<ul style="list-style-type: none"> <li>Initial assessment team is formed as a BOD and staff joint effort based on interest level and leadership input.</li> </ul>
Q2	<ul style="list-style-type: none"> <li>Continue internal advocacy inventory.</li> <li>Identify stakeholder groups.</li> <li>Continue to share advocacy training opportunities across staff and board.</li> </ul>	<ul style="list-style-type: none"> <li>Initial Assessment Team</li> <li>Liz and Yolanda</li> </ul>	<ul style="list-style-type: none"> <li>Draft Internal Advocacy Inventory detailing where skills, resources, and interests are to illustrate a clear picture of current state.</li> </ul>
Q3	<ul style="list-style-type: none"> <li>Conduct partnership inventory (survey of current and potential partnerships and impact areas).</li> <li>Add advocacy to the list of desired Board skills.</li> <li>Determine priorities around advocacy.</li> <li>Define DHIC's capacity for advocacy.</li> </ul>	<ul style="list-style-type: none"> <li>Initial Assessment Team</li> <li>Goal Team #4</li> <li>Yolanda</li> </ul>	<ul style="list-style-type: none"> <li>Draft External Partnership Inventory detailing current and potential partnerships and key impact areas.</li> </ul>
Q4	<ul style="list-style-type: none"> <li>Provide recommendations around advocacy capacity and priorities.</li> <li>Finalize stakeholder partners.</li> <li>Train staff on what constitutes policy and advocacy for DHIC.</li> </ul>	<ul style="list-style-type: none"> <li>Initial Assessment Team</li> <li>Liz and Yolanda</li> </ul>	<ul style="list-style-type: none"> <li>Using information gathered through inventory work, provide recommendations and next steps around advocacy capacity and priorities.</li> </ul>



## **Strategic Goal #2**

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**Center residents/community members in DHIC's work to support lifelong wellness and success.**

**Team Structure**

**Core Team Sponsor(s):** Sheila Porter, Michael Rogers, Michael Ward

**Goal Team Lead:** Patrick Nerz

**Goal Team Participants:** Rodney Brown, Liz Martin

**Key Milestones**

**Objectives**

<p><b>Milestone #1</b> Inventory and analysis of what resident &amp; homeownership services are currently provided, their reach &amp; use; as well as the need for add'l or different service offerings &amp; DHIC's current capacity to provide them.</p>	<p><b>By When</b> End Q1</p>	<p><b>Objective #1</b> Build community capacity by enhancing &amp; expanding the services DHIC offers to residents/clients to improve health and financial wellness.</p>
<p><b>Milestone #2</b> Identify potential service models looking at peer organizations, potential local partners, and funding sources.</p>	<p><b>By When</b> End Q2</p>	<p><b>Objective #2</b> Enhance organizational capacity by aligning structure, size, and skills with clearly defined services.</p>
<p><b>Milestone #3</b> Draft potential service offerings considering DHIC’s entire portfolio of communities.</p>	<p><b>By When</b> End Q3</p>	<p><b>Objective #3</b> Identify, redeploy, reorganize and/or obtain financial and human resources to expand DHIC’s ability to provide community services and enhance DHIC organization capacity.</p>
<p><b>Milestone #4</b> Assessment of organizational structure and capacity to center &amp; serve residents and community members across all business lines and property management function.</p>	<p><b>By When</b> End Q3</p>	
<p><b>Milestone #5</b> Budget and plan for rebranding / reorganization needed to better meet resident and community needs.</p>	<p><b>By When</b> End Q4</p>	

	Key Activities	Support & Consult	Milestones
Q1	<ul style="list-style-type: none"> <li>• Information gathering - Resident Services current state.</li> <li>• Information gathering – Homeownership Center current state.</li> <li>• Information gathering – Future health/wellness service opportunities.</li> <li>• Information gathering – Future financial services.</li> <li>• Research peer organization service models.</li> <li>• Participate in and continue to pursue CORES Certification &amp; Health Partnership Investment Action Lab</li> </ul>	<ul style="list-style-type: none"> <li>• Goal Team #1</li> <li>• Goal Team #3</li> <li>• Sheila Porter</li> <li>• Liz Martin</li> <li>• Rodney Brown</li> <li>• Board</li> </ul>	<ul style="list-style-type: none"> <li>• Inventory and analysis of what resident &amp; homeownership services are currently provided, their reach &amp; use; as well as the need for add'l or different service offerings &amp; DHIC's current capacity to provide them.</li> </ul>
Q2	<ul style="list-style-type: none"> <li>• Identify potential partners for service delivery</li> <li>• Craft case studies on peer organizations' service provision model (where success &amp; failures have been realized &amp; which are the best fit for DHIC).</li> <li>• Participate in and continue to pursue CORES Certification &amp; Health Partnership Investment Action Lab.</li> </ul>	<ul style="list-style-type: none"> <li>• Rodney Brown</li> <li>• Michael Ward</li> <li>• Board</li> </ul>	<ul style="list-style-type: none"> <li>• Identify potential service models looking at peer organizations, potential local partners, and funding sources.</li> </ul>

	Key Activities	Support & Consult	Milestones
Q3	<ul style="list-style-type: none"> <li>Identify potential funding sources outside of development and asset management revenue.</li> <li>Assess organizational structure and capacity across all of DHIC to include property management.</li> <li>Develop recommended service offerings.</li> <li>Study effectiveness of existing DHIC naming conventions and identify opportunities for rebranding.</li> <li>Conduct informed surveys based on findings from case studies.</li> <li>Participate in and continue to pursue CORES Certification &amp; Health Partnership Investment Action Lab.</li> </ul>	<ul style="list-style-type: none"> <li>Goal Team #3</li> <li>Goal Team #4</li> <li>Michael Rodgers</li> <li>Michael Ward</li> <li>Liz Martin</li> <li>Board</li> </ul>	<ul style="list-style-type: none"> <li>Draft potential service offerings considering DHIC’s entire portfolio of communities.</li> <li>Assessment of organizational structure and capacity to center &amp; serve residents and community members across all business lines and property management function.</li> </ul>
Q4	<ul style="list-style-type: none"> <li>Create and present budget proposal for service offerings at the organizational level (not to be directly funded by properties).</li> <li>Create and present plan for reclassification and reorganization of health and financial wellness services.</li> <li>Evaluate how to best leverage CORES Certificate and Health Innovation Action Lab moving forward.</li> </ul>	<ul style="list-style-type: none"> <li>Michael Ward</li> <li>Rodney Brown</li> </ul>	<ul style="list-style-type: none"> <li>Budget and plan for rebranding / reorganization needed to better meet resident and community needs.</li> </ul>



## **Strategic Goal #3**

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**Develop infrastructure to improve planning and informed decision making to support intentional growth.**



**Team Structure**

**Core Team Sponsor(s):** Will Cooley, Kayla Rosenberg Strampe, LaTonya Mckoy

**Goal Team Lead:** Tim Fisher

**Goal Team Participants:** Jackie Salvati, Tammy Simmons

**Key Milestones**

**Objectives**

Key Milestones		Objectives
<b>Milestone #1</b> Report of existing staff and BOD relationships with partner organizations and potential funders.	<b>By When</b> End Q1	<b>Objective #1</b> Refine & Create systems to promote greater efficiencies across the organization.
<b>Milestone #2</b> DHIC CEO discussed performance standards with property management companies.	<b>By When</b> End Q2	
<b>Milestone #3</b> Document illustrating feedback loops to structure future conversations.	<b>By When</b> End Q3	
<b>Milestone #4</b> Analysis of past and upcoming grant applications & future state recommendations.	<b>By When</b> End Q3	<b>Objective #2</b> Nurture partnerships that reflect DHIC’s core values & expand capital and human resources.
<b>Milestone #5</b> Documented compliance requirements of current and previously-awarded grants, etc.	<b>By When</b> End Q4	
<b>Milestone #6</b> Responsibility Assignment Matrices for organization-wide roles & responsibilities (w / Goal Team #4).	<b>By When</b> End Q4	<b>Objective #3</b> Pursue enterprise-level capital to support greater diversity of real estate development beyond the use of low-income housing tax credits.
<b>Milestone #7</b> Property Management meets DHIC performance standards.	<b>By When</b> End Q4	

	Key Activities	Support & Consult	Milestones
Q1	<ul style="list-style-type: none"> <li>Clarify high-level roles and responsibilities across the organization (to include property management company performance metrics &amp; expectations/resident surveying).</li> <li>Identify who is responsible for sourcing deals.</li> <li>Establish cross-collaboration feedback loop.</li> <li>Take inventory of community relationships across staff and BOD.</li> <li>Identify priority communities for deal sourcing.</li> </ul>	<ul style="list-style-type: none"> <li>Goal Team #4</li> <li>Department Heads</li> <li>Development Team</li> <li>Health Innovation Action Lab</li> <li>Property Mgt. Representative</li> <li>Natalie Britt</li> <li>Michael Rodgers</li> <li>Atinuke Diver</li> <li>Yolanda Winstead</li> <li>Rodney Brown</li> <li>Board</li> </ul>	<ul style="list-style-type: none"> <li>Report of existing staff and BOD relationships with partner organizations and potential funders.</li> </ul>
Q2	<ul style="list-style-type: none"> <li>Define intentional criteria for identifying and vetting deals.</li> <li>Leverage community relationships and internal strengths.</li> <li>Gain a better understanding of current and future funding streams.</li> <li>Identify funding sources of interest.</li> <li>Provide feedback to property management companies regarding performance standards.</li> </ul>	<ul style="list-style-type: none"> <li>Goal Team #2</li> <li>Development Team</li> <li>Atinuke Diver</li> <li>Liz Martin</li> <li>Yolanda Winstead</li> <li>Will Cooley</li> <li>Rachel Tutwiler</li> <li>Michael Ward</li> <li>Sharon Lorden</li> <li>Jen Foell</li> <li>Natalie Britt</li> </ul>	<ul style="list-style-type: none"> <li>DHIC CEO discussed performance standards with property management companies.</li> </ul>

	Key Activities	Support & Consult	Milestones
Q3	<ul style="list-style-type: none"> <li>• Pilot deal identification and vetting criteria across teams.</li> <li>• Maintain and support established community partnerships.</li> <li>• Collaborate with resource development to understand the pipeline and share priorities.</li> <li>• Evaluate compliance requirements of funders up-front (prior to grant submission).</li> <li>• Determine the need for oversight of compliance within the organization.</li> </ul>	<ul style="list-style-type: none"> <li>• Goal Team #4</li> <li>• Development Team</li> <li>• Yolanda Winstead</li> <li>• Atinuke Diver</li> <li>• Michael Ward</li> <li>• Liz Martin</li> <li>• Sharon Lorden</li> <li>• Rodney Brown</li> <li>• Jen Foell</li> </ul>	<ul style="list-style-type: none"> <li>• Document illustrating feedback loops to structure future conversations.</li> <li>• Analysis of past and upcoming grant applications &amp; future state recommendations.</li> </ul>
Q4	<ul style="list-style-type: none"> <li>• Revise criteria based on feedback.</li> <li>• Update manuals, processes, etc. to meet compliance requirements.</li> <li>• Evaluate property management companies against performance standards, to include a resident satisfaction metric.</li> </ul>	<ul style="list-style-type: none"> <li>• Goal Team #2</li> <li>• Development Team</li> <li>• Asset Management</li> <li>• Finance</li> <li>• Resident Services</li> <li>• Property Mgt. Representative</li> <li>• Yolanda Winstead</li> <li>• Michael Ward</li> <li>• Sharon Lorden</li> <li>• Rodney Brown</li> <li>• Jen Foell</li> </ul>	<ul style="list-style-type: none"> <li>• Documented compliance requirements of current and previously-awarded grants, etc.</li> <li>• Responsibility assignment matrices for organization-wide roles &amp; responsibilities (w / Goal Team #4).</li> <li>• Property Management meets DHIC performance standards.</li> </ul>



## **Strategic Goal #4**

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**Right-size internal capacity to align with DHIC's vision, mission, and workplace culture.**

**Team Structure**

**Core Team Sponsor(s):** Natalie Britt, Skip Jackson

**Goal Team Lead:** Issac Reyes

**Goal Team Participants:** Tiffany Wilkins, Bridgette Lynn, Susan Kohlrausch

**Key Milestones**

**Objectives**

Key Milestones		Objectives
<b>Milestone #1</b> DHIC’s Core Values refined by Core Team.	<b>By When</b> End Q1	<b>Objective #1</b> Diversify and expand revenue streams beyond traditional sources (i.e. Fees from new developments). Consider bigger philanthropic fundraising, acquisitions of existing properties.
<b>Milestone #2</b> Lunch and Learn series to improve internal knowledge sharing scheduled and KOLBE Assessments completed for full staff to strengthen workplace culture and improve team cohesion and performance.	<b>By When</b> End Q1	
<b>Milestone #3</b> Inventory of potential, existing, and past funding relationships and board insight around existing and potential funding partnerships (w/ Goal Team #3).	<b>By When</b> End Q2	<b>Objective #2</b> Clear decision-making process and production procedures across departments (clear roles and responsibilities and improved technology to better inform decision-making).
<b>Milestone #4</b> Property Management Vision Team formed.	<b>By When</b> End Q2	
<b>Milestone #5</b> Complete server enhancement to increase transparency and ease of decision making across the organization.	<b>By When</b> End Q3	<b>Objective #3</b> Clearly define and strengthen workplace culture in alignment with DHIC values and strategic goals.
<b>Milestone #6</b> Data Management Systems implemented to support the Homeownership Center and Resident services functions.	<b>By When</b> End Q4	
<b>Milestone #7</b> Ongoing implementation of Financial Reporting Software to increase transparency and ease of decision making across the organization.	<b>By When</b> Q4 into 2024	

	Key Activities	Support & Consult	Milestones
Q1	<ul style="list-style-type: none"> <li>• Review revenue streams and opportunities to enhance revenue.</li> <li>• Reach out to board for insight on partnerships and fundraising (Duke, NCSU, Alliance BCBSNC).</li> <li>• Core Strategic Team refines DHIC’s Core Values.</li> <li>• Finalize proposal for server enhancements.</li> <li>• Improve knowledge sharing through Share the Sandbox lunch &amp; learn sessions.</li> <li>• Research a more automated phone and email management system for Resident Services and Homeownership Center.</li> <li>• Research data management systems for Resident Services and Homeownership Center.</li> <li>• Identify participants for a Property Management Vision Team.</li> <li>• Complete KOLBE Assessments for all staff.</li> </ul>	<ul style="list-style-type: none"> <li>• Goal Team #2</li> <li>• Core Strategic Team</li> <li>• All Departments</li> <li>• Finance</li> <li>• IT</li> <li>• HIGOL</li> <li>• Atinuke Diver</li> <li>• Liz Martin</li> <li>• Sharon Lorden</li> <li>• Michael Ward</li> <li>• Jen Foell</li> <li>• LaTonya Mckoy</li> <li>• Rachel Tutwiler</li> </ul>	<ul style="list-style-type: none"> <li>• DHIC’s Core Values refined by Core Team to include examples of behaviors that demonstrate each value, supporting the team and board to live into these values.</li> <li>• Quarterly Lunch and Learn series planned &amp; scheduled to improve internal knowledge sharing.</li> <li>• KOLBE Assessments completed for full staff to strengthen workplace culture and improve team cohesion and performance.</li> </ul>

	Key Activities	Support & Consult	Milestones
Q2	<ul style="list-style-type: none"> <li>• Gain management approval for server enhancement.</li> <li>• Improve knowledge sharing through Share the Sandbox lunch &amp; learn sessions.</li> <li>• Research a more automated phone and email management system for Resident Services and Homeownership Center.</li> <li>• Research data management systems for Resident Services and Homeownership Center.</li> <li>• Form a Property Management Vision Team.</li> </ul>	<ul style="list-style-type: none"> <li>• Goal Team #3</li> <li>• All Departments</li> <li>• Finance</li> <li>• IT</li> <li>• Sharon Lorden</li> <li>• Jen Foell</li> <li>• Michael Ward</li> <li>• LaTonya Mckoy</li> <li>• Rachel Tutwiler</li> <li>• Rodney Brown</li> <li>• Yolanda Winstead</li> </ul>	<ul style="list-style-type: none"> <li>• Complete server enhancement to increase transparency and ease of decision making across the organization.</li> <li>• Inventory of potential, existing, and past funding relationships and board insight around existing and potential funding partnerships (w/ Goal Team #3).</li> <li>• Property Management Vision Team formed.</li> </ul>

	Key Activities	Support & Consult	Milestones
Q3	<ul style="list-style-type: none"> <li>• Conduct an internal talent assessment and assess the need for additional staff.</li> <li>• Evaluation of financial software to include vendor demonstration and selection.</li> <li>• Implement server enhancements.</li> <li>• Improve knowledge sharing through Share the Sandbox lunch &amp; learn sessions.</li> <li>• Implement data management systems for Resident Services and Homeownership Center.</li> <li>• Identify a more automated phone and email management system for Resident Services and the Homeownership Center.</li> <li>• Partner with Property Management Vision Team to create a vision for the future state of Property Management at DHIC.</li> </ul>	<ul style="list-style-type: none"> <li>• Goal Team #2</li> <li>• All Departments</li> <li>• Board of Directors</li> <li>• Finance</li> <li>• IT</li> <li>• Yolanda Winstead</li> <li>• Michael Ward</li> <li>• Sharon Lorden</li> <li>• Jen Foell</li> <li>• LaTonya Mckoy</li> <li>• Rachel Tutwiler</li> <li>• Rodney Brown</li> </ul>	<ul style="list-style-type: none"> <li>• Complete server enhancement to increase transparency and ease of decision making across the organization.</li> </ul>



	Key Activities	Support & Consult	Milestones
Q4	<ul style="list-style-type: none"> <li>• Evaluation of financial software to include vendor demonstration and selection.</li> <li>• Improve knowledge sharing through Share the Sandbox lunch &amp; learn sessions.</li> <li>• Implement a more automated phone and email management system for Resident Services and the Homeownership Center.</li> <li>• Partner with Property Management Vision Team to finalize a vision and path forward for the future state of Property Management at DHIC.</li> <li>• Implement data management systems for Resident Services and the Homeownership Center.</li> </ul>	<ul style="list-style-type: none"> <li>• Goal Team #2</li> <li>• All Departments</li> <li>• Finance</li> <li>• IT</li> <li>• Yolanda Winstead</li> <li>• Michael Ward</li> <li>• Sharon Lorden</li> <li>• Sheila Porter</li> <li>• Rodney Brown</li> </ul>	<ul style="list-style-type: none"> <li>• Data Management Systems to support the Homeownership Center and Resident services functions implemented.</li> <li>• Ongoing implementation of Financial Reporting Software to increase transparency and ease of decision making across the organization.</li> </ul>

We are excited to embark on this ambitious 3-year Strategic Plan to further strengthen and build our capacity to be a leading-edge creator of affordable thriving communities in the Triangle and North Carolina.

We invite others to join us on our journey as we take our work to the next level. We are looking for

- new partners who can further help us leverage our skills and resources
- volunteers to help with resident events
- volunteers to join our engaged, highly skilled board of directors on committees and the board itself.
- connections to friendly enterprise level capital that can allow us to experiment with innovative project ideas and secure property quickly to scale our work.
- donors looking to invest in building inclusive thriving communities that center residents and increase access to opportunity that changes lives.

If you would like to learn more and visit one of our award-winning communities, please reach out to Tinu Diver at [tinu@dhic.org](mailto:tinu@dhic.org)

We engaged in an expanded planning process this year to hear from all of our staff, board, and many of our partners and friends. Their input into this plan was invaluable in helping us see more clearly important opportunities to pursue and challenges we want to tackle. **We deeply appreciate the time and insights shared from:**

DHIC Staff

DHIC Board of Directors

DHIC Residents and Home Buyers

Bryan Hollander, Enterprise Community Partners

Scott Farmer, NC Housing Finance Agency

Yvette Holmes, SE Raleigh Promise

Larry Jarvis, City of Raleigh

Lorena McDowell, Wake County

Karen Lado, City of Durham

Cassandra Booth, NeighborWorks

**THANK YOU!**

Dexter Hebert, YMCA of the Triangle

Dan Levine, Self-Help

Chelsea Isaksen, Community Management Corporation

Terrence Kelley, Edgewood Property Management

Chris Hanson, Excel Property Management

Jacquie Ayala, Habitat for Humanity of Wake County

Teresa Pitt, Howard, Perry and Waston

Chris Beaver, Pinnacle Financial Partners

Sean Nock, North State Bank

Robin Pope Moss, Truist Bank

Jackie Wampler, Intercoastal Mortgage LLC

Joel Dancy, Fifth Third Bank

Ana Romero, Blue Endeavours Real Estate

Suzanne Burton, Northside Realty Inc.

Richard Gower, RMG Home Inspections

**THANK YOU!**