



H O M E ~ H E A R T ~ H E R I T A G E

SABIN COMMUNITY DEVELOPMENT CORP
STRATEGIC PLAN: 2016-2019

DRAFT COMPLETED:

May 25, 2016

DRAFT BY:

Sabin Board of Directors: *Harvey Rice (Chair),
Brad Hippert, Cassandra Marshall, Nick Sichenzia,
Robyn Harris, Justin Meyer, Samuel Cole, Jillian Felton,
& Doris Stevenson;*

Sabin Staff: *Mary Schoen-Clark (Executive Director),
Loulie Brown, Jennifer Craig, Graeme Oberhausen,
Bob Shaw, Lamika Colbert, & Tim Baker;*

Finance Consultant: *Sharon Lincoln;* Organizational
Development Facilitator: *Paul DeLapa*

MISSION

The mission of Sabin CDC is to stabilize and improve the livability of culturally diverse Portland neighborhoods by assuring the availability of long-term affordable housing for its low and moderate income residents, and by encouraging community partnerships for local economic development, self-help projects, and youth and senior programs.

ENVIRONMENTAL SCAN

External trends (social, political, etc.), upcoming or anticipated events (legislation, due dates, etc.), & other factors potentially impacting Sabin's priorities & mission over the next three years.

Our target constituents are being further squeezed out of the market, becoming more marginalized
Sabin's credibility has risen significantly
Portland-wide demand for affordable housing is up
Due to high demand, contractor availability for mid-size repair work is declining
PHB compliance has become more rigorous
Rodent & pest issues are rising
Portland has a new mayor
New local & state rent increase & eviction regulations pose challenges
Potential for building code changes
Legalized pot use
Seismic needs/issues will need addressing
Hotter & longer summers
Growing senior population with unique needs

ACCOMPLISHMENTS (TO MAY 18, 2016)

A. Production/Program Services

1. Increased clarity regarding the need for residential services coordination function
2. New /expanded connections with: Community Warehouse; Bradley Angle House
3. Completed second YO! program cycle with four youth
4. Planned additional educational content for upcoming YO! cycle
5. Relocated the computer lab to St Phillips

B. Resource & Financial Management

1. Received project-based vouchers from Home Forward for 350K
2. Completed transition from Cascade to self-management
3. Sold Shaver House
4. Implemented City mandated rent adjustments (increases/decreases)
5. Acquired a van
6. Awarded 50K Meyer grant
7. Received fourth loan deferral from City for 1.5 years
8. Received second cash disbursement from SAEs
9. Applied for YO! grant from BES
10. Higher & more efficient rent collection
11. Overall increase in corporate reserves/funds

C. Management & Board

1. Integrated 2 new Board members
2. Added 3 new Board committee members
3. Completed orientation training for all new & existing Board & Committee members
4. Added diversity & broadened knowledge base to the Board & Committees

D. Staffing & Personnel

1. Maintenance Engineer (Bob) now more integrated with Sabin, with resulting cost savings and knowledge capital for Sabin
2. Implemented raises for staff positions
3. More office process/procedure documentation is in place, and more underway
4. Completed three customized communications workshops with full staff participation
5. Took the first steps toward PSU internships

E. Operations & Compliance

1. On-track with resident re-certifications, already yielding a shift from 35K to 3K receivables
2. First phase of financial policy revisions are complete
3. Completed HUD training

STRATEGIC PLAN 2016-19

GUIDING PRINCIPLES

- Continue streamlining & strengthening financial accuracy & budgeting, and begin leveraging credibility & improved cash flow toward capital rehabilitation & growth
- Continue building from the NeighborWorks Assessment, incorporating strategic thinking & planning into organizational operations & norms

A. Production/Program Services

1. Rehab existing properties (Mary)
 - a. Revisit priorities for renovations & funding options using the Meyer Memorial Trust process to develop a strategy
 - b. Continuing working with/through consultant David
2. Expand the number of units (Mary)
 - a. Target for conversion of Estates property from 9 units to 19 plus 10K sq. ft. office space
 - b. Pursue funding via New Market Tax Credits & other sources
3. Add art program elements in tenant services & community building (Mary, Justin, Tim)
4. Explore the idea of a YO! program element for tenants including Iron Tribe Network (Mary, Jennifer, Tim, Grae)
 - a. Include an art/expression element
5. Enhance tenant education opportunities (Jennifer, Mary)
 - a. Conduct a tenant survey of potential educational topics
 - b. Make finance management skills education available, explore potential alliance with Portland Homeless Family Services
6. Develop a tenant services coordination function, look into contracting option (Grae, Mary)
7. Explore options/approaches for helping transition tenants who's income has risen, into owner occupied/standard housing (Board)
8. Create curriculum for "Collective Equity Home Buying" certification program (Mary, Harvey, Brad)

B. Resource & Financial Management

1. Continue to pursue permanent loan deferral with the City (Mary)
2. Refinance mortgages for Alberta & Avenue properties (Mary)
3. Purchase a truck (Bob)
4. Research & obtain security cameras (staff meeting)
5. Explore the idea of unrestricted fundraising, e.g. event (Board)
6. Connect with OR Energy Trust for utility use analysis by property (Loulie)
7. Continue toward full analysis of Boston Post (Mary, Sharon, Jennifer)
8. Extend networking relationships & partnerships in community (Jennifer, Lamika)
9. Develop a vision & plan for new office space (staff meeting)
10. Seek out State & Federal funds (long-term)

C. Management & Board

1. Create a Board fundraising committee (Board)
2. Stay open to expanding the Board membership & representation (Board)
 - a. Utilize the Board committee membership first entry path to the Board
 - b. Expand Board committee membership with non-Board members
3. Increase participation in Oregon On Conference (Board)
4. Pursue long-term approach to protecting Sabin equity / properties (Mary, Brad)

D. Staffing & Personnel

1. Assess similar non-profit compensation for competitiveness (Mary, Loulie)
2. Consider retirement package costs, approaches, & feasibility (Mary, Loulie)
3. Consider an educational compensation component for staff (Mary, Loulie)

4. Assess current staff priorities & interests regarding compensation (Mary, Loulie)
5. Explore options & feasibility for contracting for mid-size maintenance work (Mary, Grae)
6. Obtain staff training on mental health, domestic violence, HUD, & self-care (staff meeting)
7. Engage maintenance engineer with mentoring of Sabin staff (Bob)

E. Operations & Compliance (prioritized numbering)

1. Streamline office use of IT, e.g. use of the cloud, updated hard & software (Jennifer, Mark)
2. Complete technology inventory assessment and spending plan (Jennifer, Mark)
3. Develop more rigorous compliance calendaring process, protocols, & follow-thru (Loulie, Mary)
4. Continued work documenting general office & role specific procedures (Grae)
5. Develop property maintenance consistency/efficiencies by identifying standards for materials, paint, fixtures, etc., and establish inventory system/location (Grae, Bob, Loulie)
6. Research & put in place a plan/approach for dealing with bedbugs (Grae)
 - Create a “green team” to recommend solutions for sustainable products & practices (Loulie, Lamika)
 - Explore automatic rent payment options for tenants to minimize late/missed payments (Board)