



# Strategic Plan

2009-2011

## Mission

Through a united coalition of business, municipal and community leaders, our mission is to be a catalyst for the development of a range of housing options for the diverse workforce in the Greater Seacoast region of New Hampshire and Maine.

## Vision

We envision an adequate supply of affordable, desirable housing throughout the Greater Seacoast Region of New Hampshire and Maine that provides opportunities for the workforce to put down roots, and creates a more diverse community that benefits all of us.

## Stakeholders

Municipalities\*  
Housing Industry  
Employers  
General/Voting Public

*\*Named top priority 2009-2011*

## Five Town Focus and Rationale

### Decision

- We will focus most of our work (80% of our time) each year on five communities where there are ripe opportunities and parties interested in partnering with us.
- We will continue to also be opportunistic and to provide general information; have a presence; fundraise, and recruit volunteers from throughout the region (20% of our time). We anticipate that our Outreach Committee will continue to be a good tool for this work.
- Within each Partner Community we will focus on the municipality (including elected, paid and volunteer planners, other relevant boards and policy makers). In addition we will determine if and how to work with developers, employers and voters – which group(s) we work with will depend on which is most ready to make change and most open to our involvement. We will also take into consideration the need to make strategic use of our resources.

### Rationale

- small staff
- want our work to be sustainable over time
- growing leadership from within “priority” communities is more viable strategy than advocating from the sidelines; messengers from within are more credible
- want to make the biggest difference in the shortest amount of time

### Criteria

- We will select Partner Communities each year after considering the following criteria:  
*Communities that...*
  - are “ready” – whether citizen or municipally-driven, the community has begun to amass the political will to increase the amount of workforce housing in the community;
  - include at least one community from each of our three-county service area (Rockingham, Strafford, and York Counties);
  - include at least one rural, one suburban, and one urban community;
  - are currently updating Master/Comp Plan
  - are IZIP and/or HCPP grant communities;
  - are communities with which we already have some established relationships.
  - have development opportunities;
  - have already approved adoption of the RSA or have workforce housing ordinances in draft form or on the books;
  - have expressed interest in forming a Housing Commission;
  - have employers based in the community; and,
  - would like to partner with the WHC for a year’s time

### **Three-Year Outcomes**

*By 2011 we expect to achieve the following outcomes in each of our Partner Communities:*

*Each town will...*

- have developed new leaders committed to addressing workforce housing.
- have established a Housing Commission or similar body that addresses issues related to housing.
- have made at least one change to their housing ordinances.
- have more workforce housing units than they had in 2008.
- have access to more developers who have a basic working knowledge of workforce housing practices and who are interested in developing workforce housing in towns throughout the Greater Seacoast.

*By 2011, 15 other Seacoast communities will, at a minimum...*

- have an increased understanding of workforce housing, the need in their community, and strategies to address the need.
- have developed new leaders committed to addressing workforce housing.
- have begun making changes to their housing ordinances.

### **Strategic Goals for the Next Three Years**

- I To Advance the Capacity of at Least Five Communities Working to Increase Their Supply of Workforce Housing.
- II To Continue to Educate Stakeholders by Leveraging Relationships with Business, Civic and Community Groups.
- III To Increase Our Organizational Capacity to Achieve Our Mission.

## **Strategic Planning Process**

### Process

More than 30 people participated in creating this strategic plan. In January of 2009 a large group of stakeholders that included employers, members of the housing industry, municipalities and regional planners participated in a half-day strategic planning session where they provided advice and counsel regarding the needs of their communities and the direction they would like to see the Workforce Housing Coalition take in the coming years. Using their input the Coalitions' Board of Directors met in January and February to establish priorities and develop a strategic plan. The Coalition then shared a copy of the draft plan with several stakeholders from the January large group meeting to seek their input and suggestions.

This document describes our goals for the next three years and provides an implementation plan that we will use to guide our work and achieve those goals. The full Strategic Plan was approved by the Board of Directors on April 24, 2009.

### Participants

The following individuals participated in the strategic planning process:

*Employers:* Doug Bates (Portsmouth Chamber), Jim Gaylord (School Administrative Unit 21), Lauren Wool (United Way of the Greater Seacoast), Karen Pollard (City of Rochester Economic Development), Callie Carr (Exeter Hospital), Ramona Dow (Northeast Credit Union), Jackie Brayton (Portsmouth Hospital), Kristy Hiller (Portsmouth Hospital), Phil Cohen (Ocean Bank / Catapult Seacoast), Frank Wells (Hoyle Tanner), James McSharry (Portsmouth Restaurateur), Stephanye Schuyler (Unitil)\*<sup>1</sup>, Edward Tirrell (United Way of the Greater Seacoast)\*, Deb Scott (Federal Savings Bank)\*

*Housing Industry:* Leo Gagnon\* (Keller Williams), Geoff Spitzer (Chinburg Builders)\*, Mike Lassel (Lassel Architects), David Choate (Coldstream Grubb & Ellis), Jennifer Chinburg (Chinburg Builders), Mike Donahue (Donahue, Tucker and Ciandella)

*Municipalities:* Paul Schumacher\* (Southern Maine Regional Planning), Chris Dwyer (Portsmouth City Council), Kristin Grant (Maine Cooperative Extension), Steve Burns (Town of York Community Development), Glenn Shwaery (Kittery Town Council), Arlon Chaffee (Newmarket Community Development Corp.), Daniel J. Merhalski (Farmington Town Planner), Barbara Kravitz (Seabrook Planning Board), Sylvia VonAulock (Exeter Town Planner), Byrl Short (Habitat for Humanity), Cliff Sinnott (Rockingham Planning Commission)\*, Cynthia Copeland (Strafford Regional Planning)\*, Michelle Gagne (UNH Cooperative Extension)\*

*Other:* Lisa Henderson (Workforce Housing Coalition of the Greater Seacoast)

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<sup>1</sup> \* Indicates that this individual is also a member of the Board of Directors of the Workforce Housing Council of the Greater Seacoast.

## Implementation Plan

### I To Advance the Capacity of at Least Five Communities Working to Increase Their Supply of Workforce Housing

#### Objectives

#### 1.1 Identify the Five Communities We Will Partner With First

##### Milestones

- 1.1.1 *Create Menu of Services.* We have developed a “menu” of services we can offer to Partner Communities.
- 1.1.2 *Select Possible Towns.* We have used the criteria we developed through the strategic planning process to identify potential Partner Communities.
- 1.1.3 *Finalize Towns.* We have identified five communities that meet our criteria and that have expressed an interest and commitment to working with us.
- 1.1.4 *Set Annual Plan.* After consulting with each community we have decided on the set of services we will provide that year.

*Primary Responsibility:* Board of Directors

#### 1.2 Provide Training for Community Leaders.

##### Milestones

- 1.2.1 *Research and Design Training.* We have researched and designed a training series for community leaders who are interested in forming a Housing Commission or similar body (How to form a commission; how to do a housing audit; how to set up a design review process; criteria for reviewing regulations, etc.).
- 1.2.2 *Market Trainings.* We have designed and implemented a marketing plan for the trainings.
- 1.2.3 *Hold First Training.* We have completed our first Community Leader Training.

*Primary Responsibility:* Training & Materials Development Committee

#### 1.3 Provide Information and Templates (i.e. Menu of Possible Services)

##### Milestones

- 1.3.1 *Provide Evaluation Tool.* We have provided each town with a manual/guide for evaluating their existing regulations and needs.
- 1.3.2 *Create Data/Fact Sheets.* We have provided each town with data/fact sheets on workforce housing that they can use as needed to inform policy making and educate the residents in their communities.
- 1.3.3 *Provide Examples.* We have provided each town with easy descriptions of best practices in workforce housing; sample regulations; etc.
- 1.3.4 *Provide Templates.* We have provided towns with templates they may adapt and use to survey their employers and/or residents.

*Primary Responsibility:* Training & Materials Development Committee

#### 1.4 Help Communities Create A Design Review Process

##### Milestones

- 1.4.1 *Set Organizational Policy on Project Advocacy.* In light of our decision not to conduct Design Review ourselves, we have developed policies regarding developer requests for project advocacy and the degree of assistance we will provide.

- 1.4.2 *Provide Information.* We have provided local Housing Commissions (or similar bodies) with information and guidelines for developing a Design Review Process.
- 1.4.3 *Offer Consultation.* We have provided consultation to local Housing Commissions (or similar bodies) in the early stages of implementing a Design Review Process.

*Primary Responsibility:* Training & Materials Development Committee

## **II To Continue to Educate Stakeholders by Leveraging Relationships with Business, Civic and Community Groups**

### Objectives

#### **2.1 Provide Community-Specific Housing Data – (e.g. *The State of Housing in The Greater Seacoast: an annual report*)**

##### Milestones

- 2.1.1 *Assess Needs.* We have identified the types of data municipalities most want.
- 2.1.2 *Collect Data.* We have worked with NH Housing Finance Authority and the Regional Planning Commissions to collect and/or deliver the data.
- 2.1.3 *Format Data.* We have compiled the data in a format that is clear and easy to use.
- 2.1.4 *Disseminate Data.* We have designed and implemented a plan for distributing the data to the communities.

*Primary Responsibility:* Training & Materials Development Committee

#### **2.2 Provide Training for Developers.**

##### Milestones

- 2.2.1 *Research and Design Training.* We have researched and designed a training series for developers interested in learning more about workforce housing (What it is, best practices, working with municipalities, financing options, etc.).
- 2.2.2 *Market Trainings* We have designed and implemented a marketing plan for the trainings.
- 2.2.3 *Hold First Training.* We have completed our first Developer Training.

*Primary Responsibility:* Training & Materials Development Committee

#### **2.3 Provide Outreach on Workforce Housing.**

##### Milestones

- 2.3.1 *Hold Forums.* We have held two events per year on issues of interest to our stakeholders.
- 2.3.2 *Attend Networking Events.* Our Volunteers have represented the WHC at networking events put on by business, civic and community groups.
- 2.3.3 *Email Newsletter and Email Updates.* We have sent regular updates to our stakeholders.
- 2.3.4 *Create Volunteer Opportunities.* We have provided Volunteer Opportunities for our Stakeholders.
- 2.3.5 *Hold at Least One General Meeting Per Year.* We have held one general meeting per year to update stakeholders/members on our progress and invite additional participation and funding.

*Primary Responsibility:* Outreach Committee, Forum/Event Planning Committee

### III To Increase Our Organizational Capacity to Achieve Our Mission

#### Objectives

#### **3.1 Strengthen Our Organizational Structure**

##### Milestones

- 3.1.1 *Secure Tax Exempt Status.* Secured 501c3-H Status
- 3.1.2 *Update Memorandum of Understanding.* We have reached agreement with the Housing Partnership on an updated Memorandum of Understanding and we will update annually or as indicated in the current Memorandum of Understanding.
- 3.1.3 *Clarify Membership Status.* We have clarified what it means to be a membership organization (i.e., what decision-making authority do members have; do they appoint the board; approve major positions?).
- 3.1.4 *Clarify Employee Status and Create Personnel Policy.* We have documented employee status and policies.
- 3.1.5 *Increase Volunteer Participation.* We have increased our volunteer base to help achieve our goals.

*Primary Responsibility:* Governance Committee

#### **3.2 Increase the Ability of the Board to Provide the Leadership We Need to Achieve Our Mission.**

##### Milestones

- 3.2.1 *Strengthen Board Composition.* We have established our Board recruitment priorities and designed and implemented a plan for recruiting new members.
- 3.2.2 *Update Board Job Descriptions.* We have reviewed and revised our Board member job descriptions to include clear expectations regarding the Board's role as a liaison to the community; a commitment to serve on at least one Board committee; and a commitment to make a financial contribution to the organization each year.
- 3.2.3 *Revise Board Meeting Structure.* We hold one extended Board meeting each quarter that gives us the time we need to address bigger/strategic issues.
- 3.2.4 *Governance Documents.* We have updated our governance documents.
- 3.2.5 *Use Strategic Plan.* The Board and staff review and adapt the strategic plan at least twice a year.

*Primary Responsibility:* Governance Committee

#### **3.3 Financial Sustainability – To Develop the Financial Base We Need to Achieve our Strategic Goals.**

##### Milestones

- 3.3.1 *Board Members Provide Financial Support.* 100% of the Board members make a financial contribution to the Board each year.
- 3.3.2 *Board Members Recruit New Volunteers and Donors.* Every Board member actively helps the organization identify and cultivate volunteers and donors.
- 3.3.3 *Board Members and Volunteers Identify New Funding Sources to Diversify our Funding Streams.* We are less reliant on large foundation support and have increased local corporate and individual support.

*Primary Responsibility:* Board of Directors, Fundraising Committee

**3.4 Continue to Participate in Collaborations That Advance Workforce Housing.**

Milestones

3.4.1 *Collaborate Regionally and Statewide.* We have maintained active participation with such collaborations as the NH Workforce Housing Council, the Growth and Development Roundtable, etc.

*Primary Responsibility:* Staff