



Humility Homes and Services, Inc.

Strategic Plan

January 2021 – December 2025

Authorized by the Board of Directors on December 3, 2020

Table of Contents

Executive Summary	3
Organizational Description	4
Mission, Vision, Values	5
Strategic Priorities	5
Appendices	8
A – Dashboard	8
B – Evaluation of Plan	12
C – Description of Strategic Planning Process Used	13
D – Strategic Analysis Data	14
E – Board Retreat	19
F – Communicating the Plan	21
G – Strategy Screening Tool	22

Executive Summary

Though 2020 will be remembered for many reasons, two reasons are paramount:

1. The 30th anniversary of the agency's service to the community; and
2. The COVID19 pandemic that caused significant scope and service model shifts for Humility Homes and Services, Inc. (HHSI), including new and expansive resources HHSI received as a result.

It is within this context that HHSI determined a strategic planning process was necessary. HHSI engaged AltruNext to provide a framework and consulting during a five-month planning process. AltruNext conducted an environmental scan and gathered background research; developed and analyzed surveys of participants, staff, Board members and community stakeholders; led focus groups and one-on-one interviews; and facilitated a Board retreat – all virtually. The information gathered and input obtained provided the framework for the beginning of HHSI's next 30 years.

The Board affirmed the mission, vision, and values of the organization. The existing direction for programming is now being ramped up in anticipation of growing community needs related to the pandemic and its economic repercussions.

Partnerships in housing and service fields will be sought to advance this strategic plan and further advance HHSI's mission to end homelessness.

This plan provides additional emphasis on expanding HHSI's physical presence into the Illinois Quad Cities.

The following Strategic Priorities were defined through this process:

1. By December 2025, will continue to provide housing services and will grow HHSI's affordable housing portfolio of owned units that are safe, end homelessness, and provide rental income.
2. By December 2025, HHSI achieves long-term financial sustainability.
3. By December 2025, HHSI will realize diversity, equity, and inclusion both within the organization and within our community.
4. By December 2025, HHSI will enhance organizational capacity to ensure people, resources, and systems are in place to fully implement Strategic Priorities #1-3 and prepare for long-term organizational sustainability.

The HHSI Board and Administrative Team will work on these priorities and monitor progress quarterly through regular Board meetings.

Given the unparalleled and unexpected nature of the pandemic, HHSI also needs to have the capacity to strategically respond to community needs in real-time. As part of the strategic planning process, AltruNext also helped HHSI develop a Strategy Screening Tool, designed to quickly evaluate opportunities as they arise.

We invite all those interested in supporting our success to participate in the realization of this strategic plan.

Organizational Description

Humility Homes and Services, Inc.'s (HHSI) services are grounded in our mission to end homelessness, the vision of a home for every person, and the Housing First philosophy. Housing First quickly and successfully connects individuals and families experiencing homelessness to permanent housing without preconditions and barriers to entry, such as sobriety, treatment or service participation requirements. Everyone is housing ready.

Outreach Navigators

Our Outreach Navigators visit parking lots, abandoned buildings, hospital emergency departments and encampments building trust and providing emergency supplies and referrals to appropriate services to those in need.

Emergency Shelter

70 capacity, emergency shelter serving women and men 18 years of age and older. We assist participants identifying the most appropriate housing program and support services necessary to achieve short and long-term housing stability.

Winter Overflow Shelter – operates from December 1 – April 15 providing warm space and services for persons not able to gain access to the year-round shelters in the Quad Cities.

Veterans Programs

Transitional Housing for Veterans/Low-Demand – provides single veterans emergency shelter and service coordination to help them secure longer-term, supportive housing.

Supportive Services for Veterans and their Families – provides financial assistance and supportive services for Veterans and their families who are experiencing homelessness or at significant risk of becoming homeless.

Permanent Supportive Housing

We assist persons who are living with disabilities and have experienced long-term homelessness with the housing, financial assistance and service coordination they need to remain safely housed.

Rapid Re-Housing

We assist families and single adults to quickly transition from homelessness into their own lease agreements through a holistic package of temporary financial assistance and service coordination.

Mission-Focused Housing

Mission-Focused Housing is cost-effective, low obstacle, quality housing for individuals and families in a community where affordability is becoming more scarce. Mission focused housing includes single-room occupancy units.

Fresh Start Center and Corner Closet

We help participants in all of the housing programs obtain household items, furniture, clothing, and personal hygiene products they need to establish and maintain their homes. The Fresh Start Center

provides job training programming for participants seeking to add and refine workforce and work-readiness skills.

Mission, Vision, Values

Mission – Humility Homes and Services, Inc. is committed to ending homelessness by offering housing opportunities and supportive services in the greater Quad Cities area.

Vision – A home for every person.

Values – We believe in:

1. Quality – We believe in meeting a standard of excellence in everything we do.
2. Housing is a Human Right – We believe in the inherent worth and dignity of every person and that each person deserves to have a place they call home.
3. Integrity – We believe in acting according to strong, ethical principles.
4. Accountability – We honor our commitments.
5. Community – We believe in the power of partnership and collaborate with others to lead, advocate, and succeed in ending homelessness.

Strategic Priorities

Strategic Priority #1 – By December 2025, will continue to provide housing services and grow HHSI’s affordable housing portfolio of owned units that are safe, end homelessness, and provide rental income.

Goal 1.1 – By May 2021, develop and scale a budget and service model that can ramp up affordable rental and supportive units, as defined by Administrative Team and Finance Committee.

Goal 1.2 – By December 2021, identify and partner with real estate solutions group to locate properties that fit criteria defined by the Property Committee.

Goal 1.3 – By December 2023, Administrative Team will define and implement Moving On Strategies that can be incorporated into programming and units in order to create stable housing opportunities for more vulnerable groups.

Goal 1.4 – By December 2025, HHSI will have added 84 owned units to our mission-focused housing portfolio.

Goal 1.5 – By December 2025, HHSI will have added 30 units of supportive housing to our portfolio.

Strategic Priority #2 – By December 2025, HHSI achieves long-term financial sustainability.

Goal 2.1 – By May 2021, Finance Committee and Administrative Team will develop a monthly financial report that includes an income statement, balance sheet and cash-on-hand with current month, comparison to prior month, and year-to-date comparisons.

Goal 2.2 - By July 2021, establish policies and procedures for the use and investment strategy of the agency’s investment funds.

Goal 2.3 - By December 2021, HHSI will secure [Commission on Accreditation of Rehabilitation Facilities \(CARF\)](#)¹ accreditation.

Goal 2.4 – By December 2022, HHSI will engage a consultant to develop and begin implementation of a comprehensive and capital campaign with the dual purpose of meeting Strategic Priority #1 and Strategic Priority #2.

Goal 2.5 - By December 2023, HHSI will have at least six months of operating expenses in cash-on-hand and short-term securities.

Goal 2.6 – By December 2025, investment funds will exceed \$5,000,000 through both strategic investments and targeted donations, with \$500,000 being available annually to the Property Committee for capital needs.

Strategic Priority #3 – By December 2025, HHSI will improve diversity, equity, and inclusion both within the organization and within our community.

Goal 3.1 – By December 2021, HHSI Board will hold an annual board education/training event on racial and ethnic diversity, equity, and inclusion presented by the Executive Committee.

Goal 3.2 – By December 2021, the Executive Committee will create and implement a diversity, equity, and inclusion process that includes recruitment and retention of a diverse Board, workforce, and volunteers.

Goal 3.3 – By December 2022, the Administrative Team and Executive Committee will activate the Lived Experience Advisory Board (LEAB) with formal policies and procedures that streamline the participation and advisory nature of people who are reflective of those HHSI serves.

Goal 3.4 – By December 2023, the Administrative Team will develop and implement an immersion learning program that educates members of the community about the intersections of homelessness and diversity, equity, and inclusion through experiences that may include tours of shelter, discussions with participants, and other experiences that help individuals understand homelessness. Specific opportunities will be explored by an ad-hoc group.

Goal 3.5 – By December 2024, the Administrative Team and Nominating Committee will ensure that the Board, workforce and volunteers reflect the demographics of the greater Quad Cities area, with a focus on racial and ethnic diversity.

Strategic Priority #4 -- By December 2025, HHSI will enhance organizational capacity to ensure people, resources, and systems are in place to fully implement Strategic Priorities #1-3 and prepare for long-term organizational sustainability.

Goal 4.1 -- By December 2025, HHSI will continue to provide evidence-based programming that aligns with the organization's mission, vision, and values, as corresponds with the community needs as demonstrated by data obtained from reliable sources.

Goal 4.2 -- By January 2021, the Administrative Team will have completed a comprehensive marketing, development, and communications plan which fosters community awareness,

¹ Accreditation needed for important SSVF grant and one that can open up additional funding opportunities.

engagement, and philanthropic support of current and future HHSI programs. This plan will be updated on an annual basis.

Goal 4.3 -- By July 2021, Administrative Team will have reviewed and updated all staff job descriptions; Executive Committee will have reviewed and updated all Committee job descriptions (standing and current ad-hoc).

Goal 4.4 -- On a quarterly basis, both staff and Board will review progress toward these strategic priorities utilizing the dashboard tool. Staff may make recommendations for revision(s)/update(s) prior to the Board's quarterly meeting designated for review of the Strategic Plan progress. Revisions can be made by Board vote.

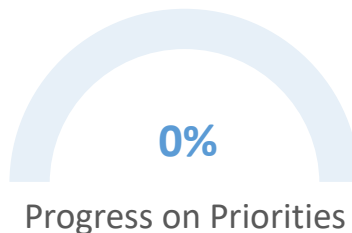
Goal 4.5 -- On an annual basis, the Board will conduct an in-depth review of progress on the Strategic Plan, as well as other organizational governance due diligence activities (i.e. review by-laws; sign conflict of interest statement; approve annual budget; and other activities deemed as best practices and agreed upon by the Board.)

Goal 4.6 - By January 2024, HHSI will begin engagement of a renewed strategic planning process in furtherance of the Strategic Priorities achieved.

Appendices

A – Dashboard

The Administrative Team will utilize this dashboard to update progress on Strategic Priorities to the board on a quarterly basis.



Goal	Description	Due Date	Lead	Status
Strategic Priority #1	Grow HHSI’s affordable housing portfolio of owned units that are safe, end homelessness, and provide rental income.	December 2025	All	0%
1.1	Develop and scale a budget and service model that can ramp up affordable rental and supportive units.	May 2021	Finance Committee	0%
1.2	Identify and partner with real estate solutions group to locate properties that fit criteria.	December 2021	Property Committee	0%
1.3	Define Moving On Strategies that can be incorporated into programming and units in order to create stable housing opportunities for more vulnerable groups.	December 2023	Administrative Team	0%
1.4	HHSI will have added 258 owned units to our mission focused housing portfolio.	December 2025	Property Committee	0%
1.5	HHSI will have added 30 units of supportive housing to our portfolio.	December 2025	Administrative Team	0%
Strategic Priority #2	HHSI achieves long-term financial sustainability.	December 2025	All	0%
2.1	Develop a monthly cash-on-hand report to track progress towards future goals.	May 2021	Finance Committee	0%

2.2	Establish policies and procedures for the use and investment strategy of the agency's investment funds.	July 2021	Finance Committee	0%
2.3	Secure Commission on Accreditation of Rehabilitation Facilities (CARF) accreditation.	December 2021	Administrative Team and Board	0%
2.4	Engage a consultant to develop and begin implementation of a comprehensive and capital campaign with the dual purpose of meeting Strategic Priority #1 and Strategic Priority #2.	December 2022	Finance Committee	0%
2.5	Have at least six months of operating expenses in cash-on-hand and short-term securities.	December 2023	Finance Committee	0%
2.6	Investment funds will exceed \$5,000,000 through both strategic investments and targeted donations, with \$500,000 being available annually to the Property Committee for capital needs..	December 2025	Finance Committee and Property Committee	0%
Strategic Priority #3	HHSI will realize diversity, equity, and inclusion both within the organization and within our community.	December 2025	All	0%
3.1	HHSI Board will hold an annual board education/training event on racial and ethnic diversity, equity, and inclusion.	December 2021	Executive Committee	0%
3.2	Create and implement a diversity, equity, and inclusion process that includes recruitment and retention of a diverse Board and workforce.	December 2021	Administrative Team and Executive Committee	0%
3.3	Activate the Lived Experience Advisory Board (LEAB) with formal policies and procedures that streamline the participation and advisory nature of people who are reflective of those HHSI serves.	December 2022	Administrative Team and Executive Committee	0%
3.4	Develop and implement an immersion learning program that educates members of the community about the intersections of homelessness and diversity, equity, and inclusion through experiences that may include tours of shelter, discussions with participants, and other experiences	December 2023	Administrative Team and Ad-hoc Group	0%

	that help individuals understand homelessness. Specific opportunities will be explored by an ad-hoc group.			
3.5	Ensure the Board, workforce and volunteers reflect the demographics of the greater Quad Cities area, with a focus on racial and ethnic diversity.	December 2024	Administrative Team and Nominating Committee	0%
Strategic Priority #4	HHSI will enhance organizational capacity to ensure people, resources, and systems are in place to fully implement Strategic Priorities #1-3 and prepare for long-term organizational sustainability.	December 2025	All	0%
4.1	HHSI will continue to provide evidence-based programming that aligns with the organization’s mission, vision, and values, as corresponds with the community needs as demonstrated by data obtained from reliable sources.	December 2025	Administrative Team	0%
4.2	Complete a comprehensive marketing, development, and communications plan which fosters community awareness, engagement, and philanthropic support of current and future HHSI programs. This plan will be updated on an annual basis.	January 2021	Administrative Team	0%
4.3	Review and update all staff job descriptions; review and update all Committee job descriptions (standing and current ad-hoc).	July 2021	Administrative Team and Executive Committee	0%
4.4	On a quarterly basis, both staff and Board will review progress toward these strategic priorities utilizing the dashboard tool. Staff may make recommendations for revision(s)/update(s) prior to the Board’s quarterly meeting designated for review of the Strategic Plan progress. Revisions can be made by Board vote.	December 2025	Administrative Team and Board	0%
4.5	On an annual basis, the Board will conduct an in-depth review of progress on the Strategic Plan, as well as other organizational governance due diligence activities (i.e. review by-laws; sign conflict of interest statement; approve annual	December 2025	Board	0%

	budget; and other activities deemed as best practices and agreed upon by the Board.)			
4.6	HHSI will begin engagement of a renewed strategic planning process in furtherance of the Strategic Priorities achieved.	January 2024	Board	0%

B – Evaluation of Plan

The Administrative Team will regularly update the dashboard that will be presented to the Board on a quarterly basis.

Key questions that will be answered on a quarterly basis include:

- Are the Strategic Priorities and Goals being achieved or not?
 - If so, then acknowledge, reward, and communicate successes
 - If not, then determine the following:
 - Should the completion deadline be changed?
 - Are adequate resources being deployed to achieve this goal?
 - Are there unexpected events that have changed the immediate course?
 - Are the goals still realistic?
 - Should the goals be changed?
 - What has been learned by not achieving the goals as stated?

Procedures for Changing the Plan

If the Administrative Team and Board believe that changes to the Strategic Priorities need to be made, then the following process should occur:

1. Recommendations should be presented to the Board by the Administrative Team regarding the (1) specific changes to be made, (2) what's causing the changes to be made, and (3) why the changes are necessary.
2. The Board may ask for additional information and have discussion about the proposal presented.
3. The Board would vote to amend the Strategic Priorities, as revised.

C – Description of Strategic Planning Process Used

2020 will be remembered for many reasons; the COVID19 pandemic that caused significant scope and service model shifts, the new and expansive resources HHSI received as a result, and as the 30th anniversary of the agency’s service to the community. It is in this context that HHSI conducted a strategic planning process.

HHSI engaged AltruNext to provide a framework and consulting during a five-month planning process. During this time, the Executive Director, Assistant Director, and Strategic Initiatives and Grants Manager met virtually, weekly, and a group of Board members met virtually, bi-weekly to assist in planning. The process was divided into three primary phases.

Phase 1 (Prepare) – Phase 1 consisted of confirming the process and deliverables, identifying potential stakeholders for survey feedback and interviews, and considering key environmental factors and literature. Phase 1 took place between July 1, 2020 and July 31, 2020.

Phase 2 (Listen) – Phase 2 consisted of gathering and assessing data, conducting stakeholder interviews and surveys, completing an environmental review and competitive scan, and work began on creating the Strategy Screening Tool. Phase 2 took place between July 1, 2020 and August 31, 2020.

Phase 3 (Envision & Plan) – Phase 3 consisted of finalizing a workable Strategy Screening Tool, identifying the “Big” questions, preparing and implementing a Strategic Board Retreat, and drafting the plan. Phase 3 took place between September 1, 2020 and November 9, 2020.

Once the Board approves the plan, the staff will transition to the next phase in the planning process of executing the plan with ongoing evaluation.

THE STRATEGIC PLANNING PROCESS



D – Strategic Analysis Data

External Data – Data that was analyzed included empirical information from reliable sources about program effectiveness, including from the Corporation for Supportive Housing, National Alliance to End Homelessness, OrgCode, and the National Low Income Housing Coalition. The QC Housing Cluster vision, *Silos to Solutions*, was reviewed.

The political environment, COVID19 pandemic, and racial justice movement following the killing of George Floyd, were discussed in regard to impact and potential impact on funding, services, and effects on participants. Specifically, the COVID19 pandemic forced HHSI to provide isolation housing in compliance with the Centers for Disease Control and Prevention (CDC) guidance. As a result, participants from emergency shelter were placed in hotels for much of the summer. By August 2020, emergency shelter was operating at limited capacity in order to maintain appropriate social distancing.

Internal Data – The Administrative Team completed an Organization Capacity and Assessment Tool (OCAT) as part of pre-planning work. The OCAT measured organizational capacity across ten domains. Results included the following:

OCAT Self-Assessment Results (Out of 4.00 Possible)	
1. Mission, Vision, Strategy & Planning	2.75
2. Program Design & Evaluation	3.00
3. Human Resources	3.09
4. ED/Leadership Team	3.50
5. Information Technology	3.00
6. Financial Management	2.67
7. Fund Development	2.80
8. Board Leadership	2.86
9. Legal Affairs	4.00
10. Marketing, Communications, & External Relations	2.50

Additional historical information was reviewed, including the 2018 Internal and External Stakeholder Report provided by Mission + Strategy.

Demographic Data – Demographic data was considered as well. In FY 2020, HHSI served 1,065 unique/unduplicated individuals across all programs. Of those 1,065; 739 (69%) identified as male, 326 (31%) identified as female, 6 (0%) identified as transgendered or gender nonconforming; 101 (10%) were under age 17, 890 (83%) were between the ages of 18-61, and 74 (7%) were aged 62 and older; 718 (67%) identified as White, 273 (26%) identified as Black, 2 (0%) identified as Asian, 21 (2%) identified as American Indian, 2 (0%) identified as Native Hawaiian, and 49 (5%) identified as multiple races [disproportionate percent of Black population – 10.7% in QCA metro area from American Community Survey 5 year estimate in 2018]; 90 (8%) identified as Hispanic/Latino/a; 223 (21%) were Veterans; 247

(23%) were chronically homeless; 682 (64%) had at least one disability, with mental illness the most common – 398 (37% of total), followed by chronic health conditions 332 (31% total), followed by physical disability 236 (22%), followed by substance use disorder 196 (18%); 394 (37%) had 2 or more disabilities; 272 (26%) had experienced domestic violence; 988 (93%) lived with extremely low incomes (less than 30% Area Median Income), with 530 (50%) having no income; 605 (57%) had at least one non-cash benefit like food stamps; and 879 (83%) had health insurance.

Between March 1, 2020 – October 1, 2020 – 780 unique individuals were served compared to 668 during the same time period in 2019 – a 17% increase (112 additional people). More than 40% of all participants fall into a high-risk category population as defined by CDC as at-risk for complications, morbidity and mortality from COVID19 for age, chronic health condition, chronic homelessness, and lack of health insurance.

Emergency Shelter – Primary Reason for Homelessness Given at Emergency Shelter						
Primary Reason for Homelessness	FY 2020		FY 2019		FY 2018	
Total Served	548	100%	530	100%	507	100%
Lack of Income/Lack of Affordable Housing	213	39%	223	42%	227	45%
Disability/Poor Health	132	24%	113	21%	98	19%
Family Breakup/Divorce	89	16%	83	16%	82	16%
Domestic Violence	37	7%	27	5%	18	4%
Jail/Prison/Other Institutional Setting	39	7%	44	8%	30	6%
Fire/Disaster	4	1%	7	1%	2	0%
Other	34	6%	33	6%	50	10%

Emergency Shelter - Zip Code of Last Permanent Address						
	FY 2020		FY 2019		FY 2018	
Total Served	548	100%	530	100%	507	100%
Scott County	389	71%	347	65%	336	66%
Rock Island County	98	18%	100	19%	103	20%
Other Iowa	36	7%	48	9%	39	8%
Other Illinois	12	2%	15	3%	12	2%
Other State	13	2%	20	4%	17	3%

Performance Data – Performance data reviewed included the following items:

- Emergency Shelter exits to permanent housing – 39% (Iowa Statewide Emergency Shelter average is 25%)
- Rapid Rehousing exits to permanent housing – 80% (evidence threshold is 75%)
- Permanent Supportive Housing maintained – 95% (evidence threshold is 85%)
- All programs – 31% of all participants gained earned income upon program completion; 18% gained SSI/SSDI income upon program completion
- All programs – 1% gained health insurance at program exit

- All programs – 5% gained non-cash benefits (like food stamps) at program exit

Survey Data – Surveys were provided to participants (13), staff (11), and the community at-large (9). 33 total individuals provided feedback through surveys. Of those 33 respondents, 33 (100%) believed the mission statement was accurate; participant satisfaction was 4.1 out of 5, staff satisfaction was 4.5 out of 5, and community satisfaction was 4.1 out of 5. Participants feel respected by staff – 4.5 out of 5.

Programming priority suggestions from survey respondents:

1. More supportive and affordable housing, including for single adults, women and children
2. Increase staff and board diversity
3. Increase involvement in statewide efforts to end homelessness
4. Improve communication and education internally and in the community – to be a thought leader

Kudos from Surveys – "I'm not very good at projecting, but I'm amazed & impressed with how we've grown & changed in the past 5 years!! When I started volunteering, there were mostly single parents & kids. We don't see as many of those anymore, but a variety of others!!! I guess I'm anxious to see how we can continue to grow & meet new challenges. I think the new training program for participants to help move them toward employment is a great plan." – Volunteer

"It's an honor to work here -- everyone is sincerely dedicated to the populations we serve and the services we are able to provide and always looking for ways to improve." – Staff

"Humility Homes saved our family from homelessness and separation. Thank you" - Participant

"They don't judge you when you go to the donation center. They make you feel welcome, not embarrassed. The staff is really good about helping you out." – Participant

"Basically, Humility Homes and Services has saved my life, probably more than once. Most certainly, I am very grateful for this place" – Participant

Focus Group and One on One Interview Data – The following Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis was culled from the focus group and one-on-one interview data.

Strengths	Weaknesses
<ul style="list-style-type: none"> ● Leadership, mission, reputation ● Mission: housing is a human right; acceptance ● Staff: Efficient, dedicated/committed, mission-focused, and passionate ● Committed board members with an array of knowledge and skills ● Strong community support and credibility as a cutting-edge agency ● Program satisfaction is high 	<ul style="list-style-type: none"> ● Inconsistent donor stewardship activities ● Continuing education for Board and staff ● Lack of racial diversity of Staff and Board ● Absence of clear documentation of Board, Committees and Staff roles and responsibilities for efficiency and effectiveness

<ul style="list-style-type: none"> ● Strong reputation: Stable, dependable, deliver on promises, honesty in addressing the needs of the community, professional, sensitive, responsive, exceptional, effective, passionate, caring, measurable results, trusted, action-oriented, transparent, well-connected, smart 	
(External) Opportunities	(External) Threats
<ul style="list-style-type: none"> ● Community engagement – communication strategies to share our ‘why’ ● Increased connection to other community entities and local businesses ● Greater collaboration with government (municipal and otherwise) ● Expanding need for housing 	<ul style="list-style-type: none"> ● Financial sustainability - Decreasing govt and community resources ● Lack of regional cooperation and partnership with Davenport, Bettendorf, Moline, Rock Island ● Lack of affordable housing units ● Pandemic ● Community attitudes about homelessness

Brand Recognition / Community Engagement

- **The strength of reputation can be leveraged for future success.** The Sisters of Humility of Mary are well-trusted in the community. The shift away from Humility of Mary into a combined organization as Humility Homes and Services prompts the community to wonder if they should expect the same stewardship and practices that they experienced from the Sisters. Though the Sisters are still involved, it is understood that they are aging and will not be able to be involved to the same degree as in the past. In HHSI communications and development, there is an opportunity to lean into the Catholic roots of the organization, weaving in a contemporary view of social justice with focus on primary, evidence-based practices.
- **Increase empathy through education.** The community does not understand the issue of homelessness in its full complexity. Consider how to educate about the context and realities of homelessness (health/health insurance, unemployment/underemployment, child care, addiction, mental illness, shortage of affordable housing, and other factors) to help fight the stigma of homelessness. Education efforts could include, but are not limited to: donor communications, outreach events, police officer education (decriminalizing homelessness), and becoming a reliable source for the media on issues of housing instability. Expanding this communications strategy would also build fund development focus beyond congregations.
- **Collaboration with government.** Ongoing relationship building with members of the City Council would be beneficial for when proposal opportunities arise, members are familiar already, important to include value proposition to leverage other funds.

Racial Equity

- **HHSI’s mission is grounded in social justice.** Housing is a human right is a justice-focused mission. This can be underscored throughout the work as contributing to racial equity efforts.

- **Start with Board and staff education.** There is agreement from the community data that racial equity initiatives should be an important focus for HHSI. Everyone acknowledges that the face of the organization (i.e., Board and staff leadership) is white. A good starting point to confront and address this fact is education around privilege. One voice pointed out that there is general aversion to talking about things in the community that make the majority uncomfortable. Topics should include: Board and staff diversity, avoiding tokenism, and ongoing culturally competent services. Other organizations in the region are making this a priority (QC Community Foundation and United Way of the QCA) and there is an opportunity for HHSI to lead the way for others. The United Way of the QCA is holding an Equity Summit in mid-October, which may be something to leverage.
- **Build trust with minority-led organizations working on the periphery of homeless issues** (i.e., domestic violence, job skills, work with immigrants/refugees, etc.)

Service Area

- **Tensions around city/county resource allocation and who should benefit.** The Quad Cities region faces regional funding challenges in a number of areas. Housing instability is one issue that seems to draw a lot of attention in Davenport and Scott County because services are available there (and funded, in part, by tax dollars). There is lack of participation from other municipalities (besides Davenport) when working towards ending homelessness in the Quad Cities. There is particular frustration that the state of Illinois does not contribute to efforts. Coordination may be possible through better leverage of the Quad Cities Housing Cluster. There is an obvious tension between the view that everyone deserves the right to housing and supports, no matter where they come from, and those that believe in a more strict allocation of resources based on original residency is prudent. Coordination among services providers does come with the challenge of competition for funding. The Quad Cities does create one community and addressing homelessness cannot be divided into sections.
- **HHSI has proven they have the capacity to operate broadly across the Quad Cities, despite footprint in Davenport.** Location of the shelter impacts how people think about the relevance of the organization/focus of the service area.

Program Priorities

- **In the immediate term, there is great support for a shift into affordable housing units** due to the challenges created by the pandemic. The emergency shelter model is less safe with COVID19 and there are also more people suffering from housing instability with the economic impact of the virus. In the longer-term, the community's views were more disparate with some sentiment that the emergency shelter will become more again once the virus is under control. Plus, nationally, there is movement from focusing on short-term (emergency shelter) solutions to long-term housing solutions.
- **The Street Outreach program has great support and perceived success.** The business and policing communities are highly supportive of the Street Outreach program and would like to see it expand and replicate in other areas. The quick partnership and turnaround time in coordination with the Downtown Davenport Partnership is a model that could be replicated to expand the impact.

Partnership Suggestions

- QC Housing Cluster
- Department of Corrections/7th Judicial District

- Downtown Davenport Partnership
- Local Government
- Hospitals

E – Board Retreat

AltruNext facilitated a virtual board retreat on October 16 and 17, 2020. The following are notes from the retreat.

Top Priorities

- **More affordable housing**
 - Explore hotels and other properties with CARES funding and capital campaign
 - Setup process/due diligence (maybe in strategy screening tool) to define opportunities
 - Identify goal of X units per year to keep board accountable (family and individual?)
 - Expand footprint – into Illinois
 - Moving from shelter focus to individual homes
 - Explore working with real estate solutions group
- **Financial stability/security** – finding the sweet spot so we can be bold enough to meet the enormous need, but not put long term stability at risk
 - Grow endowment/investments
 - Endowment income go to capital purchases only designation
 - 3 months operating expenses in cash on hand
 - Avoid going into debt
 - Grow operating revenue from rental income to pay for other services. Leverage real estate to both house people and become fiscally more self-reliant
 - Develop scalable budget for per unit basis
 - Establish/clarify financial policies and procedures
 - National funding stream
- **Envision racial equity**
 - Board education
 - Implement evidence-based programming for inclusivity
 - Lived Experience Advisory Board implementation
 - Create awareness event
 - Increase board diversity

Themes

- **Service Area**
 - Desire to retain “Greater Quad Cities” in mission statement
 - Hub with physical presence in Davenport
 - Provide services to people in a broader physical region, but presence is not equally represented
 - Illinois side not aware of Illinois presence; augment IL presence
 - Confusion about merger
- **Finances**
 - Direction on concept of debt – cost of acquisition of property – consider loans vs. investment income

- Local government support
- Opportunities to become self-sustaining through rental units (look for opportunities to increase operating revenue)
- Decide how to handle endowment (need documentation)
- What we want to create should drive the decisions
- Board education – ¾ board should be financially literate
- Vision going forward: purchasing properties – loans/capital campaign
- Mission focused housing can support permanent supportive housing (star category)
- **Programming**
 - Utilize hotels, respond to unique needs of individuals and families
 - Explore permanent supportive housing family needs
 - Explore homeownership
 - Consider additional partnerships (i.e., housing for those with mental health and/or substance abuse issues, in partnership with relevant service providers)
- **Brand Recognition**
 - Past great work of the Sisters should continue to be emphasized
 - Trust, people invested
 - Idea: photo exhibit
 - Build capacity of the city
 - Marketing plan in progress, social media leverage
 - Building relationships with media in progress
 - “Justice, not charity”
 - Volunteer opportunities
- **Racial Equity**
 - Diversify by making connections, being intentional about developing relationships
 - Diversity, Equity and Inclusion staff at St Ambrose Univ (Ryan Sadler)
 - Executive Director and Development Director are participating in diverse groups (i.e. local NAACP, LULAC, etc.)
 - Consider recruiting multiple diverse candidates to start as a cohort
 - Focus on skill sets
 - Formal implicit bias training for board
 - Vary times of Board meetings and board functions
 - Executive Director will speak with Community Foundation about their learnings/process
 - Also need to strive for greater staff diversity
- **Governance**
 - Executive Committee handling governance issues
 - Is Board too involved? Executive Director will compile report about specific feedback
 - Committee structure seems reasonable
 - Would like an anthology/compendium of the history. Sister Mary Rehmann will document.
 - Allow virtual members with connection to Quad Cities?
 - Possible need for Advocacy Committee – or simply an advocacy team?

F – Communicating the Plan

HHSI's Strategic Plan should be disseminated in the following manner:

1. Every Board member and Administrative Team member should receive a full copy of the final version.
2. Executive Summary should be shared with key stakeholders and all staff members.
3. Executive Summary may be shared on website and published in newsletter.
4. New Board members and staff should receive appropriate copies of the Strategic Plan at orientation.
5. Reference should be made in the annual report of the progress made on the Strategic Plan.
6. As requested and/or as deemed appropriate by the Executive Director, the full Strategic Plan, or portions thereof, may be shared with funders, major donors, and/or key organizational partners.
7. The core organizational priorities and direction for the next five years, as described in the Strategic Plan, will be the key messages disseminated through various communication tools (i.e. printed materials, social media, website, events, donor appeals, grant proposals, etc.). Consistent messaging will help the community and our constituents understand who we are and the work that we do.

G – Strategy Screening Tool

Step 1. High-Level Strategy Screen

Does the opportunity meet the following criteria?

The purpose of High-Level Strategy Screen is to evaluate the opportunity against the mission and specific values of the organization. Financial and staff capacity are important and complex considerations that are evaluated in Step 2, after we know that the opportunity is otherwise a fit for the organization.

Our strategy must...

- Support our mission
- Be consistent with Housing First principles, our culture, and values
- Be culturally inclusive
- Serve a prioritized need and be supported by data acquired both in-house and externally from trusted sources
- Align with and use of evidenced-based models from trusted sources

Step 2. Opportunity Matrix

Select one Program over another (if relevant) AND overlay impact on the organization. High assessment scores indicate a good fit for the organization at this point in time. Scale: 1 (lowest) to 5 (highest)

The purpose of the Opportunity Matrix is to assess 1) how closely the opportunity is aligned with our strategic vision and 2) its long-term sustainability from both a financial and staff capacity perspective.

OPPORTUNITY CRITERIA	Score
<p>How big is the need? The measured need is...</p> <ul style="list-style-type: none"> ● 5 = EXISTING and accounts for more than 34% of the cost-burdened population/20% of the chronically homeless population ● 3 = EMERGING, and accounts for between 26-33% of the cost-burdened population/11%-19% of the chronically homeless population ● 1 = LOW and accounts for less than 25% of cost-burdened population/10% and less of the chronically homeless population 	
Comments	
<p>What is its value to our mission and vision?</p> <ul style="list-style-type: none"> ● 5 = Primary connection (housing or ties supportive services and housing) AND the opportunity moves us towards ending homelessness ● 3 = Secondary connection (job readiness/training) AND the opportunity manages homelessness ● 1 = Tertiary connection (healthcare, ..) AND the opportunity manages homelessness OR makes the problem worse 	

Comments	
<p>Is the opportunity sustainable? Does it pay for itself without additional support? Be sure to include the cost of new staff, if needed, in the analysis.</p> <ul style="list-style-type: none"> • 5 = yes, it is self-sustaining • 3 = It is self-sustaining in the near-term, but the money might run out in 1-3 years or funding could be taken away from other programs to support • 1 = No, this opportunity is not sustainable for multiple years 	
Comments	
<p>On a scale of 1 to 5, how equitable is the opportunity? (1 = least equitable and 5 = most equitable)</p> <ul style="list-style-type: none"> • Is the program environment culturally inclusive (what holidays are celebrated, bilingual signage, etc.)? • Are there any barriers that might cause a specific racial group to avoid or be barred from housing/participating (e.g. culturally biased dress codes, racial balance of program staff, rules on previous behavior or residence, etc.)? 	
Comments	
<p>What's our competition to meet this need?</p> <ul style="list-style-type: none"> • 5 = no one is meeting this need • 3 = there are others meeting this need, but in a different way • 1 = there are others meeting this need in the same way 	
Comments	
OPPORTUNITY SCORE*	

*Highest possible score is 30. Minimum score for moving forward is 20.

Organization Criteria	Score
<p>Do we have staff capacity now and in the future?</p> <ul style="list-style-type: none"> • 5 = The plan to maintain staff capacity for this opportunity beyond year 1 is sustainable • 3 = Current staffing has capacity or there is a short-term plan to create it • 1 = We don't have capacity now and there's no plan to create it for this opportunity 	

Comments	
<p>Is funding for this opportunity sustainable over a three year time horizon?</p> <ul style="list-style-type: none"> • 5 = Funding is reasonably sustainable and provides the capability to consider other types of funding • 3 = Funding is reasonably sustainable for three years • 1 = Funding is not sustainable for three years 	
Comments	
<p>Would the measurable outcomes of the organization be worse than (1 point), the same as (3 points) or exceed (5 points) the following metrics?</p> <ul style="list-style-type: none"> • Permanent affordable housing obtained = 25% of served population • Stable permanent housing maintained = 80% of served population (RRH) 	
Comments	
<p>What is the scale of negative impact to other programs caused by adding this opportunity? Which other programs or departments will be negatively impacted by adding this opportunity and how? Consider both financial and staff/programming capacity.</p> <ul style="list-style-type: none"> • 5 = negligible negative impact on other programs • 3 = some negative impact • 1 = significant negative impact 	
Comments	
<p>How does this opportunity affect our strategic relationships (or important connections)?</p> <ul style="list-style-type: none"> • 5 = key relationship/s are improved / keeps door open for future funding or partnership • 3 = it keeps us in good graces / neutral • 1 = it diminishes effectiveness of key relationship/s 	
Comments	
ORGANIZATION SCORE[^]	

[^]Highest possible score is 25. Minimum score for moving forward is 17.

TOTAL (OPPORTUNITY + ORGANIZATION SCORE)**	
---	--

**Highest possible score is 55. Minimum combined score for moving forward is 37.

Step 3. Matrix Map

If the above two tools have not made the decision clear, then this tool can help to evaluate the results and foster discussion about where the opportunity sits and how things could be shifted to make it more successful or desirable. This map could be used on an ongoing (annual?) basis to regularly evaluate the organization's portfolio of programs and projects.

There are four steps to make a matrix map of your organization or individual opportunity:

1. Identify your "lines of business" or activities
2. Assess relative mission impact
3. Determine profitability
4. Map the results

