Many of us talk about strategic planning, but do we really understand what it means? Especially for affordable and public housing. Does your board know why you need a strategic plan and can they appreciate the effort it will take to crank one out?

Even if we don’t know the answers to these questions, Bryson and Alston stress the importance of having a strategic plan in their 2015 book, Creating Your Strategic Plan.

“Leaders and managers of organizations and communities must think, act, and learn strategically, now and in the future, if they are to meet their legal, ethical, professional, organizational, community, and public service obligations successfully.”

Don’t be discouraged

"People easily get caught up in Strategic Planning," says Navigate Affordable Housing Partners CEO Eric Strong. "It becomes such a burden to time and resources, that nothing happens. That is just not necessary.”

With that in mind, we released a series of blog posts on "Strategic Planning.” Navigate’s goal was to break down some the major components of a strategic plan. Those posts became the e-book you have in front of you right now.

Thank you for downloading this book and good luck with your plan!

Ebony Hall, Marketing Coordinator
Navigate Affordable Housing Partners
The Mission Statement

What are we here for?

By definition, the Mission Statement is "A written declaration of an organization’s core purpose and focus that normally remains unchanged over time." The business dictionary says "Properly crafted mission statements:

• serve as filters to separate what is important from what is not
• clearly state which markets will be served and how, and
• communicate a sense of intended direction to the entire organization."

Your PHA's Mission Statement is something that is "meant for employees and leaders of the organization," according to Chron writer Madison Hawthorne. Ultimately, you need to consider "What are we here to do and why," write Bryson and Alston in their book, "Creating Your Strategic Plan: A Workbook for Public and Nonprofit Organizations."

Entrepreneur.com came up with 10 questions that can help your agency craft its mission statement:
1. Why are you in business?

2. Who are your customers?

3. What image of your business do you want to convey?

4. What is the nature of your products and services?

5. What level of service do you provide?

6. What roles do you and your employees play?

7. What kind of relationships will you maintain with suppliers?

8. How do you differ from your competitors?

9. How will you use technology, capital, processes, products and services to reach your goals?

10. What underlying philosophies or values guided your responses to the previous questions?

Crafting your statement
Inc.com suggests you keep it short and sweet. Alyssa Gregory at TheBalance.com suggests you show it to your mother! "A mission statement must be a concise paragraph describing what your company does and for whom," Gregory writes. "If she does not understand it, start again."

In the next chapter, we take a look at The Vision Statement.
Two

The Vision Statement

What’s your vision of success?

The Vision Statement of your Strategic Plan

Vision without action is merely a dream. Action without vision just passes the time. Vision with action can change the world.

- Joel A. Barker

What does your housing agency hope to achieve?

According to Wikipedia, "A vision statement provides strategic direction and describes what the owner or founder wants the company to achieve in the future." Authors of strategic planning guides are quick to point out the differences between The Mission Statement and The Vision Statement. While a mission statement answers the question, "What are we here for," vision statements, according to Paula Fernandes "are future-based and are meant to inspire and give direction to the employees of the company, rather than to customers."

Fernandes compiled a series of 10 tips for creating your Vision Statement. We're including three of our favorites here:

1. **Project five to 10 years in the future.** Where do you and your team see your agency in the next decade? What kind of agency would you like to be? Will you be an agency that focuses on elderly services or one focused on helping all people in need?

2. **Dream big, and focus on success.** There's nothing wrong with dreaming big! As you lay out your strategic plan, you can take the time to set a goal and plan out the route it takes to get there. You have time. Putting the vision down on paper helps keep you on the right path.
3. **Use the present tense.** While we are focused on future success, we're operating in the now. This means even if you dream of being an agency of choice that helps families stay together, your strategic plan has you working towards it today. Not only will you **be** the agency of choice. You are presently working to accomplish that. The phrasing of your vision statement should reflect that.

We've mentioned the book, [*Creating Your Strategic Plan: A Workbook for Public and Nonprofit Organizations*](https://example.com) in our chapter on The Mission Statement. In this chapter, we look at their definition of what your "vision of success" should look like. Bryan and Alston write, "An organization typically has to go through more than one cycle of strategic planning before it can develop an effective vision for itself."

A vision of success for your housing agency's future is therefore “more likely to be a guide to strategy implementation than to strategy formulation.” In other words, this vision of success is what you are working towards. Any tactic that doesn't get you closer to your vision statement is misplaced, and you need to rethink how it fits into your strategic plan.

You can read more about their six steps for writing a vision statement in their book (Location 2268 in Kindle Edition).

The next chapter breaks down The SWOT Analysis.
The SWOT Analysis

S is for Strengths

The SWOT analysis is very important when it comes to your public housing agency. First of all, let's talk about what SWOT stands for. Leadershipthoughts.com has the perfect explanation:

- **Strengths** are positive attributes internal to the organization or situation that are within your control.

- **Weaknesses** are also internal factors within your control that may impede your ability to meet your objectives.

- **Opportunities** are external factors that the organization or project should (or could) develop.

- **Threats** are external factors beyond your control that could place the project or organization at risk.

S is for Strengths

"This section contains both strengths within the organization and external strengths, such as client relationships," says Franki Colbert.

What is your agency currently doing right? How do outsiders view your agency? What do you do better than other agencies of your size?

Investopedia adds, "Strengths describe what an organization excels at, allowing decisions on how to gain a competitive advantage."

W is for Weaknesses

What needs improvement? What do others perceive as a weakness in your organization?

Investopedia defines weaknesses as items that "stop an organization from performing at its optimum level. They have the potential to reduce progress or to give a competitive edge to the competition. An organization needs to minimize weaknesses and analyze how they can be improved. An inadequate supply network or lack of capital are example of weaknesses."

O is for Opportunities
Wikipedia defines opportunities as "elements in the environment that the business or project could exploit to its advantage." For example, is there a partnership with another agency that might help you carry out your mission?

T is for Threats
A threat is a negative external factor, according to MarketingTeacher.com.

MindTools.com offers this tip for you to remember: "Strengths and weaknesses are often internal to your organization, while opportunities and threats generally relate to external factors."

Here are a few tips for a simple SWOT analysis:

1. Grab a piece of paper and divide it into four quadrants, the Strengths and Weaknesses on one side, the Opportunities and Threats on the other.
2. Fill each quadrant in.
3. Analyze each item and determine how it can fit into your overall strategy for business success.

Download our SWOT Analysis Worksheet to complete your simple SWOT analysis.

Goals & Objectives are up next!
The Goals and Objectives of your Strategic Plan

Your Public Housing Agency Strategic Plan can never be complete without specific goals and objectives. Students will tell you they often get these two confused. Goals and objectives often look and sound the same. Lucky for us, the NCJA Center for Justice Planning (NCJP) has a very simple explanation:

♦ **Goals** are the ends toward which a program or problem solution is directed. Goals are outcome statements to guide implementation of the strategy (i.e., the tactics of what is planned to be done). While goals tend to be general or broad and ambitious, they also must be clear and realistic in order to clarify the team's direction and gain support of other stakeholders.

♦ **Objectives** are more detailed than goals and explain how goals will be accomplished. Objectives detail the activities that must be completed to achieve the goal.

For example, if your goal is to reduce vacancy rates, your objectives might be as follows:

- Improve maintenance response by 20% in one year.
- Reduce turnaround time by 10% in six months
- Improve resident relationships in one year.

Be SMART
Students will also remind you to be "SMART" in setting your goals and objectives. Mindtools.com says this will help make your goals achievable. The site references Professor Robert S. Rubin in the definitions below. We've added our own notes to explain how they relate to the goals and objectives listed above.

- S=Specific: Notice how the above goal and objectives are very specific? It says exactly what we hope to achieve.

- M=Measurable: The first two objectives contain benchmarks (20% and 10%). You can measure the state of your resident relationships by surveying them at the start of your initiative. Survey them again about six-months down the road to see if your are moving the needle at all. SurveyMonkey.com is a good platform to start with.

- A=Attainable or Achievable: The goal and objectives listed above can certainly be achieved.

- R=Relevant or Realistic or Results-based: The goals are relevant to affordable housing and are certainly realistic in nature.

- T=Time Bound: Notice how we have listed a time frame in which to meet our objectives (six months or one year).

Read the conclusion to Strategic Planning Basics next!
Conclusion
The Living Document

Closing out our e-book on the basics of the Strategic Plan for Affordable and Public Housing, we must keep this in mind: “the final plan is not where success abides.”

The headline of a Graham Kinney article in the Harvard Business Review reads, “Strategic Plans Are Less Important than Strategic Planning.” Kinney writes, “In a fluid, unpredictable environment you need to have a very different understanding of plans and planning. A case in point is military strategy.”

It’s during the planning process we learn more about our organizations, ourselves and possibly more about our colleagues, too. It’s in those hours, days and months that we not only uncover our strengths and opportunities but the weaknesses and threats that could be detrimental to what we are trying to build.

Kinney believes that a “plan” itself can skew managers’ expectations. The manager thinks if they will follow steps 1, 2 and 3 of the plan, they will accomplish goals A, B and C.

“In their eyes the strategic plan becomes a device for control rather than one of guidance,” Kinney writes. “This can manifest itself as ‘we’ve given up on strategic planning.’ Kinney would rather mangers to “think of the plan as a guidance tool” (Kinney, 2015). It’s during that planning process, however, that we formulate the plan that will guide us in the future.

That being said, we must begin to think of the strategic plan as a living document.

"To have an effective Strategic Plan, it should be a living document and not just something that is completed and stuck on a shelf," says Navigate CEO Strong.

Remember the Covey quote in Chapter 1? “Your mission statement becomes your constitution.” Much like the Constitution, the basic principles of our plan remain the same. What changes over time, is how we approach new challenges to those principles.
From the writer

I hope this quick e-book on Strategic Planning for Affordable and Public Housing was helpful to you. The format actually has many applications not only in housing but marketing, business, public relations, non-profits and more. Please share it with others!

Do you already have a Strategic Plan? If it's not, perhaps you need help in crafting one. Let Navigate point you in the right direction for your strategic plan. Contact Navigate Affordable Housing Partners today.

Navigate Affordable Housing Partners - Affordable Housing is our middle name.
NavigateHousingConsulting.com