Minnesota Housing Partnership

2018-2019 HOUSING INSTITUTE
Workshop 3 – Agenda
Sept 18 - 19, 2018

Tuesday, September 18th, 2018

3:30	Arrival & Hotel Check-In
4:00	Welcome, Team Presentations
5:00	Social Hour
6:00	Dinner
7:00	Communication, Collaboration and Cross-Jusidictional Participation *Dara Lee: Executive Director, Clay County HRA*

Wednesday, September 19th, 2018

8:00	Breakfast
9:00	Action Planning Case Study *Barbara Dolan: Community Development Manager, MHP*
10:30	Break – Hotel Checkout
10:45	Prioritizing New Resources for Housing *Elizabeth Glidden: Director of Policy and Strategic Innovation, MHP*
12:00	Lunch
1:00	Rural Placemaking *Michele Anderson: Rural Program Director, Springboard for the Arts*
2:00	Using GIS Mapping in Rural Housing Revitilization *Luis Pereira: Economic Development Manager, MHP*
3:00	Wrap up: Homework and Workshop Evaluation

2018 HOUSING INSTITUTE:
September 2018 – Guest Speakers

Dara Lee, Executive Director, Clay County HRA

Dara A. Lee has been the Executive Director of the Clay County Housing & Redevelopment Authority (HRA) since 2005. From 1994 to 2005 she worked for Legal Services of Northwest Minnesota as an attorney and supervising attorney in their Bemidji, Alexandria and Moorhead offices representing people experiencing poverty. She received her BBA from the University of North Dakota in 1990 and her JD from Yale Law School in 1993.

In her current position, she oversees the HRA rental assistance, housing and rehabilitation departments. Her focus is on keeping up with local, state and federal laws and policies; grant writing; financial budgeting and planning; strategic planning; board development; new program and housing development; and inter-agency collaborations (including serving on numerous boards).

She and her husband like to travel and attend their daughter's multitude of high school activities. You can email Dara at dlee@claycohra.com

Barbara Dolan, Minnesota Housing Partnership



Barbara has over nineteen years' in the housing industry. Before joining MHP, she worked in greater Minnesota Community Action agencies managing single family development and homeownership loan and rehab programs. Barbara came to MHP with experience delivering high-level project technical coordination, construction project management, grant writing, financial management, training-event management and is a certified Housing Development Finance Professional and licensed real estate broker. Through MHP, she continues to provide support to help rural organizations coordinate strategies in developing regional/local collaboration and in addressing community needs for additional housing. Email Barbara at barbara.dolan@mhponline.org

Elizabeth Glidden, Minnesota Housing Partnership



Elizabeth drives MHP's policy and programs toward outcomes that improve the quality, affordability and availability of housing in Minnesota and beyond. She is a public policy professional and lawyer with more than 25 years of experience. Elizabeth served as Council Member for the City of Minneapolis from 2006-17 and Council Vice President from 2013 to 2017, working a wide range of housing issues. Prior to her service on the City Council, Elizabeth represented individuals as an employment and civil rights lawyer for more than 10 years. Elizabeth is a 2013 Bush Fellow, focusing her fellowship on race-conscious leadership development for local elected officials. You can email Elizabeth at elizabeth.glidden@mhponline.org

Michele Anderson, Rural Program Director, Springboard for the Arts



Michele Anderson is a composer, creative writer and pianist with a BA in Music from Lewis and Clark College, and an MA in Cultural Sustainability from Goucher College, where she was awarded the inaugural Rory Turner Prize in Cultural Sustainability. In 2015, Michele was selected by the Minnesota Council of Nonprofits for their Catalytic Leader Award. Michele is reachable at michele@springboardforthearts.org

Luis Pereira, Minnesota Housing Partnership



Luis provides direct technical assistance and capacity building with a focus on community economic development. He is an AICP-certified planner with the American Planning Association, a Housing Development Finance Professional, and has a certificate in program evaluation. He has worked as a local government planner in Minnesota and Tennessee, served as team lead for a Minnesota Housing Finance Agency single family community development program, and most recently served as Economic Development program manager for a neighborhood-based community development project supporting small and immigrant-owned businesses in Northwest Illinois. You can email Luis at luis.pereira@mhponline.org

GREATER MINNESOTA HOUSING FUND

Minnesota Housing Partnership

ACTION PLANNING

A Tool for Moving your Goals Forward

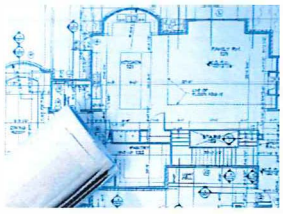
September 19, 2018

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WHAT IS AN ACTION PLAN?

A blueprint for achieving a specific goal.

- Provides the:
  - **Who?**
  - **What?**
  - **When?**
  - **Where?**
  - **How?**



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HOW DOES IT HELP?

The TEAM:

- Create feasible action steps
- Assign tasks
- Develop a timeline
- Promote task accountability



The COMMUNITY:

- Promotes project accountability
- Documents and evaluates activities
- Assures community participation
- Builds consensus

BEFORE YOU BEGIN

1) **Outline the problem or issue you would like to address**
   1) What are you trying to change?
2) **Gather data about your issue**
   1) Government records/websites
   2) Local/National organizations
   3) Schools and Libraries
   4) Community Opinion



3) **Determine the stakeholders**
   1) Who is most affected by the problem?
   2) Who is in the best position to make a change?

Lakes Region Housing Coalition

- Committed consortium of regional partners
- Completed Housing Needs Analysis
- Stable but aging population
- Vacant school building; or
- Other building sites?
- What next?



STEP ONE:

Create a vision statement!

- Vision statement: An aspirational description of what your team wants to achieve or accomplish in the mid-term or long-term future. It should serve as ***a clear guide for choosing current and future*** courses of action.
- Should be:
  - Specific
  - Simple
  - Inspirational



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Action Planning Template

2018 – 2019 Housing Institute

Team Name: Lakes Region Housing Coalition
Project Lead: Mary Featherstone
Team members: Peter Piper, Goldie Locklear, Jack Sprat, Jackie Horner,

Start Date: September 19, 2018
Progress update:
Completion date:

Vision Statement: *LRHC will preserve and increase community housing options through collaborations at the local level*
Goal:

Action Steps (What are the specific steps we need to take?)	Resources Needed (What do we need to complete this step?)	Responsible Person (Who will take action to complete this step?)	Potential Challenges (Are there barriers that will need to be addressed?)	Timing (Start date End date)	Intended Outcome (What will success look like?)

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STEP TWO:

- **Develop your Plan!**
  - How will you achieve your vision?
  - What are your goals?
- *Should be S-M-A-R-T*
  - **S**pecific
  - **M**easurable
  - **A**chievable
  - **R**elevant
  - **T**ime based



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Action Planning Template

2018 – 2019 Housing Institute

Team Name: Lakes Region Housing Coalition
Project Lead: Mary Featherstone
Team members: Peter Piper, Goldie Locklear, Jack Sprat, Jackie Horner,

Start Date: September 19, 2018
Progress update:
Completion date:

Vision Statement: *LRHC will preserve and increase community housing options through collaborations at the local level*
Goal: *By Opening the doors of the vacant Bluedale High School property for 24 units of intermediate income rental housing by 2019*

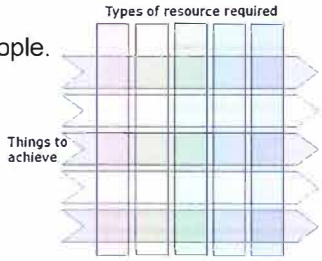
Action Steps (What are the specific steps we need to take?)	Resources Needed (What do we need to complete this step?)	Responsible Person (Who will take action to complete this step?)	Potential Challenges (Are there barriers that will need to be addressed?)	Timing (Start date End date)	Intended Outcome (What will success look like?)

STEP THREE:

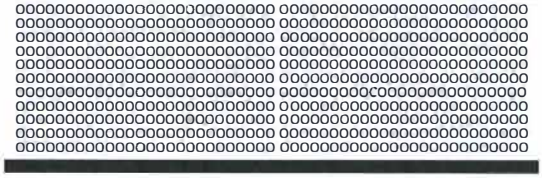
- **Develop Action Steps to achieve your goals!**
  - Brainstorm
    - What are the steps needed? Consider multiple approaches.
    - Who needs to be involved?
    - What resources will you need to complete your objectives? How will you get them? ***SCHEME***
    - When will you start? When will you finish?
    - How will you know you've completed the step? Results or outcome statement.

S-C-H-E-M-E-S

- **S**pace.
- **C**ash.
- **H**elpers/People.
- **E**quipment.
- **M**aterials.
- **E**xpertise.
- **S**ystems.

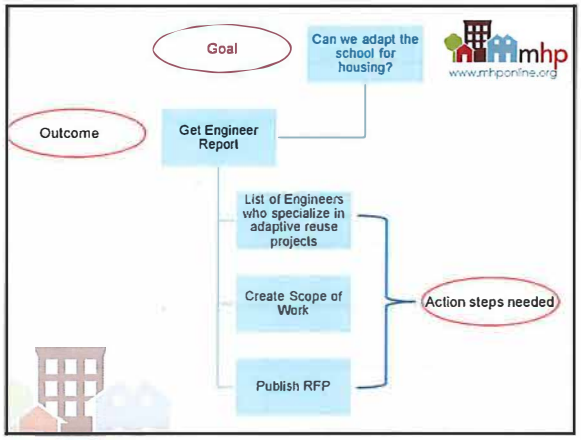


Try to find 'C' in 1 minute



Backward Planning

- Looks much the same as a traditional forward plan.
- Process is different.
- Forces you to think from a different perspective



Action Planning Template

2018 – 2019 Housing Institute

Team Name: Lakes Region Housing Coalition
Project Lead: Mary Featherstone
Team members: Peter Piper, Goldie Locklear, Jack Sprat, Jackie Horner,
Start Date: September 19, 2018
Progress update:
Completion date:

Vision Statement: *LRHC will preserve and increase community housing options through collaborations at the local level*
Goal: *a) Define the suitability of the vacant Bowsette High School property for 24 units of affordable income rents housing by 2019*

Action Steps (What are the specific steps we need to take?)	Resources Needed (What do we need to complete this step?)	Responsible Person (Who will take action to complete this step?)	Potential Challenges (Are there barriers that will need to be addressed?)	Timing (Start date End date)	Intended Outcome (What will success look like?)
Get a list of Engineers Create Scope of Work Publish RFP				Start 07-17-18 End 08-31-18	Get Engineer Report

Activity: Brainstorming the Steps

1. Using the sticky-notes: each person should write down things that must happen in order to achieve the goal for LRHC (5-10 minutes)
2. Categorize all of the sticky-notes by Action Steps on the wall (10 minutes)
3. As a team, put the Action Steps in sequential order Check to see if there are any critical steps missing – add if necessary (15 minutes)
4. List the steps sequentially in your template; add a start and end date and what you want to see as a result of the Action Step. (10 minutes)
5. Report back to the group at large.

WRITING THE PLAN

- What's left to define?
- Each action step should also include:
  - Who will do the work
  - Required Resources
  - Potential Obstacles



FINALLY…

Is your Action Plan:

- Comprehensive and clear?
- Feasible and timely?
- Flexible and prioritized?
- Does each team member know what is expected of them? Do they have a plan on how to move forward?
- Do you have the resources needed to complete? If not, how will you get them?

EXECUTING THE PLAN

- **Keep track of your progress!**
  - Gather feedback – monitor performance
  - Keep refining/adding/removing steps
  - Track costs and personnel on each step
- **Communicate your progress!**
  - Stay in contact with stakeholders
  - Publicize meetings
  - Keep everyone in the know

Sustainability

- How can we collaborate with stakeholders?
- Who sets the priorities?
- Who keeps us on Track
- When do we check-in?
- How do we communicate? (internally and externally)

ACTION PLANNING SUMMARY:

- Action plans:
  - Refine your group's purpose and objectives
  - Break down problems into actionable steps
  - Help clarify the actors and stakeholders
  - Hold team members accountable for individual tasks
  - Provide transparency and inspiration

Useful Tip

- Project Management Comparison Chart
  - Free or low cost project management software to help your team plan, communicate and coordinate activities



Action planning: guide and template

Developing an action plan can help bring about the project your team wants to see completed. It can help your team to plan a project thoroughly by listing all of the tasks needed to finish in order to meet an objective. This simple activity can save time and money by increasing your team's efficiency and accountability and ensuring your team doesn't miss any key steps.

Action Plans are useful, because they give you a framework for thinking about how you'll complete a project in a sensible order. Because you can see each task on paper, you can quickly assign tasks to team members, decide which ones you'll need to outsource and which tasks you may be able to ignore.

This abbreviated guide and template are meant to suggest several easy steps to facilitate the action planning process. Involving every member of the team in this process will be critical to ensuring the success at the implementation stage.

Helpful things to keep in mind…

Identify areas of focus – what is the need

Identify areas of focus using information from:

- Reports – Housing Needs Assessments, Environmental Studies, etc.
- Surveys - Community responses to questions, Census Data, etc.
- Strategic/operational plans - Housing Plans, Council Resolutions, Department planning docs, etc.

Focus on a project to implement based on results from the surveys, reports and other resources such as those listed above. Be prepared to support your need with quantifiable data.

Make sure the activities you work on to accomplish these goals will provide the biggest returns for your time – 20 percent of your activities will account for 80 percent of your results. Avoid the rabbit holes with no clear end in sight.

Action plans should have goals that are Specific-Measurable-Achievable-Realistic-Timeframe (SMART)

Action planning as a team

Make a decision on how to seek advice from team members in the formation your action plans. Options may include a combination of:

- Forming a focus group or working party
    - If using a working party or focus group, take action plans back to the wider group/team for feedback.
- Using a team meeting as an action planning session
- Seeking team input through a confidential feedback form or suggestion box

Document your Action Plans so that you can come back to it on a regular basis and determine what has been accomplished, how have activities changed, whether or not roles or timelines have changed and etc. As you move through to implementation, the specifics of the project may change; it is important that action planning is an iterative process.

NOTE: While the template below may be useful for some teams, it can be modified to meet individual team needs. Think of it as another tool in your tool-box.

Review

Are your action plans… Specific Measurable Achievable Realistic Timeframe?
Are your action plans… aligned to the team's or community objective?
Do your action plans… focus on those activities with the biggest pay-offs?

Filling out the Action Plan template

Project Lead

It is important to nominate a person who can be responsible for supporting the process to make sure outcomes identified in the Action Plan are met. This person is also responsible to the team in providing informal and/or formal progress updates via team meetings, email, intranet etc.

Progress update

A progress update should be conducted on a regular basis to confirm that actions are on track and to manage any developing issues. This could be a weekly, monthly, quarterly check-in depending on the type of project.

Vision Statement

An aspirational statement on what your team would like to achieve or accomplish in the mid-term or long-term future with your project.

Goal

An end result that can be measured and has one or more objectives achieved within a fixed timeframe. This is the "what" – the result that the activities are supposed to achieve. Once you are clear on the what, you are ready to work out the steps to take to arrive there.

Action Steps

A brief description of what must be achieved. What activities could be conducted or implemented to achieve the intended outcome? Being specific about what you are trying to achieve makes it easier to undertake corrective or maintenance actions and evaluate success.

- Start by brainstorming all of the tasks that you need to complete to accomplish your objective. It's helpful to start this process at the very beginning. What's the very first action you'll need to take? Once that task is complete, what comes next? Are there any steps that should be prioritized to meet specific deadlines, or because of limits on other people's availability?

- Analyse and Delegate Tasks. Now that you can see the entire project from beginning to end, look at each task in greater detail. Are there any steps that you could drop, but still meet your objective? Which tasks could you delegate to someone else on your team, or could be dealt with by an outside vendor/contractor? Looking carefully at each item decide whether you should action on it. Some of the identified tasks have no real relevance to the process, or are really not important in the scale of things. If that is the case, then delete these things from your list. What are the deadlines for specific steps? Do you need to arrange additional resources?

Resources/costs of activities

Consider any costs/resources required for the action; will the action require any individual(s) to contribute significant time (portion of their work time). Use the mnemonic SCHEMES to help think about different resources needed. ***S**pace, **C**ash, **H**elpers/People, **E**quipment, **M**aterials, **E**xpertise, **S**ystems*

In addition you will need to note what activities incur financial costs; these will need to be carefully budgeted. The outside vendors/contractors and staff time will be some of your major costs.

Responsible Person

In deciding who should be responsible for a particular activity, you need to take the following into account:

- The experience, skills, capabilities, confidence needed to do the task.
    - Who has time to do the task when it needs to be done?

- How willing is the responsible person? There will always be some tasks no-one is too keen to do, but if people either see a task as naturally falling into their work (so, for example, a bookkeeper says he will do the budgeting), or someone is interested in a particular task it may get done more effectively and efficiently. If there is no-one on the team with both the ability and the time, you may need to hire in external support. This will have implications for the timing.

Challenges in achieving intended outcomes

Consider the types of challenges which may make it difficult for you to reach your target within the specified time and develop ways to address these.

Timing

There are two aspects to timing in action planning:

- When to do it; and
- How to plan the time needed to carry out your activities.

Knowing when to do it requires that for each action step you:

1. Identify a date by when the intended outcome must be achieved.
2. Establish a realistic starting date for carrying out the activities needed to achieve the intended outcome.
3. Determine how much time each activity will take.
4. Identify what needs to happen before the activity can be started and how much time that is likely to take.
5. Identify what needs to happen after the activity is completed and how much time that is likely to take.

You should now be in a position to decide by when an activity must begin and by when it must be completed.

When it comes to planning the time needed, the secret is usually sequencing: doing things in the right order to ensure the process is held up because something that should have been done earlier hasn't been done. For example, don't leave consultation with a community until after you have decided what you are going to do in the community, and don't begin building a dam until you have had the engineer's reports.

Changes in strategy or in assumptions may require changes in what you actually do in the longer term and will require updates to the Action Plan.

Intended Outcome

What needs to happen to meet the goal?

Action Planning Template

2018 – 2019 Housing Institute

Team Name: **Project Lead:** **Team members:**	**Start Date: __/__/____** **Progress update: __/__/____** **Completion date: __/__/____**

Vision Statement:

Goal:

Action Steps *(What are the specific steps we need to take?)*	**Resources Needed** (What do we need to complete this step?)	**Responsible Person** (Who will take action to complete this step?)	**Potential Challenges** (Are there barriers that will need to be addressed?)	**Timing** (Start date End date)	**Intended Outcome** *(What will success look like?)*

2018/19 Housing Institute
HOMEWORK for WORKSHOP 3

- ☐ Review the attached suggested questions for next workshop's Developer's Roundtable activity. Add any questions to the list that would help your team learn more about the individual developers and how they could assist in the implementation of your projects.

- ☐ Finalize a team concept paper and submit a copy to Harlan Buckalew at harlan.buckalew@mhponline.org. Be prepared to present on your concept paper at the upcoming workshop. Developers will be invited to sit in on presentations.

- ☐ Schedule next conference call and meetings with TA staff
  - o Conference call date & time:_____
  - o Local TA meeting date & time:_____

Next Housing Institute Workshop: **Jan 22 and 23, 2018 at the Willmar Conference Center**

DEVELOPER MEETINGS – SUGGESTED QUESTIONS

1. Describe your organization's experience in developing projects that are similar to the proposed project in terms of housing type, number of units, target tenancy, integrations of support services (if applicable), and sources of financing. Describe any unique areas of expertise. What development activities do you contract out?

2. What, specifically, will you expect from a nonprofit, government, or social service agency "partner" during the development, construction, marketing and rent-up (or sale) phases of the project?

3. How do you propose to communicate about project progress and challenges with the project partners?

4. How can we, as community leaders, help you engage the community in the project decision making process? How can we help you to communicate with the general public about project progress and challenges?

5. Describe your organization's experience acting as a "project manager." What kind of skills does your staff have to take on this role?

6. Describe the fee structure your organization requires.

7. Do you have experience owning or managing properties? What kind of ownership or management roles are you willing to take on?

Minnesota Housing Partnership

2018-2019 HOUSING INSTITUTE
Workshop 3 – Evaluation
September 18th-19th, 2018

For each statement below, put a checkmark for the response that best matches your belief about the workshop you just completed.	**Strongly Agree**	**Agree**	**Neither Agree nor Disagree**	**Disagree**	**Strongly Disagree**
Dara Lee's keynote presentation offered useful information about collaboration in regional and local housing development strategies.					
Why or why not? Was it useful?					
MHP's Case Study presentation will help the team to develop an Action Plan.					
Why or why not? Was it useful?					
Elizabeth Glidden provided useful insight on possible ways to create designated housing finance streams applicable to the team's project(s).					
Why or why not? Was it useful?					
Michele Anderson's Rural Placemaking presentation provided useful information on how to incorporate arts and creativity to promote our projects.					
Why or why not? Was it useful?					

Luis Pereira's GIS Mapping presentation demonstrated how this process can inform rural housing revitilization.					
Why or why not?					
Overall, the workshop was a worthwhile use of my time.					
Why or why not?					

Rate your satisfaction with the following:	**Very Satisfied**	**Satisfied**	**Neither Satisfied nor Dissatisfied**	**Dissatisfied**	**Very Dissatisfied**
Hotel Accommodations					
Meeting Space					
Food					

Please answer the following questions in the space provided to the right, Continue on the back of this sheet if necessary.

What specific aspects of the workshop do you feel were most valuable?	
What specific aspects of the workshop do you feel were the least valuable?	
What changes, if any, would you like to see for future workshops?	
Please share any additional comments, if any:	