



Strategic Plan  
2021 - 2024



# Strategic Plan

## 2021 - 2024

Developed in Partnership with:





Strategic Plan  
2021 - 2024

TABLE OF CONTENTS

INTRODUCTION .....3

PARTICIPANTS .....4

MISSION, VISION, VALUES .....5

DIFFERENTIATORS OF COMMUNITY BASICS .....6

Opportunities For Community Basics .....7

Threats Facing Community Basics.....7

UTILIZING THE PLAN.....8

STRATEGIC PLAN.....9

**OUR TEAM** .....9

**OPERATIONS** .....9

**IDENTITY WITHIN THE COMMUNITY** .....9

**DEVELOPMENT** .....9

**FINANCE**.....9

**BOARD** ..... 10

**ORGANIZATIONAL DEI** ..... 10





## Strategic Plan 2021 - 2024

### INTRODUCTION

For over 20 years, Community Basics, Inc. has been developing and managing affordable rental housing in Lancaster County and the surrounding areas. Through partnerships with federal, state and local organizations, Community Basics has built a portfolio of properties that has provided stable housing for individuals who have experienced homelessness, individuals who struggle with disabilities, and working families struggling to make ends meet. With a strong mission, Community Basics has significantly impacted the lives of many residents of Lancaster County by providing a place they can call home.

The future sustainability of Community Basics is based on a clear understanding and commitment to the values, vision and mission of the organization, in addition to the development of a Strategic Plan that seeks to fully accomplish the organization's purpose. To help facilitate this process, Community Basics engaged the services of North Group Consultants to provide assistance to the Board of Directors, Executive Director, and staff to 1) review and clarify the values, vision, and mission of Community Basics, Inc. and 2) develop a Strategic Plan that will guide the organization into the future.

Through a series of meetings with the Board of Directors, staff, and other stakeholders, North Group gained valuable insight regarding the future direction of the organization as well as an analysis of the strengths, weaknesses, opportunities and threats facing Community Basics. Using this information, North Group Consultants, alongside the team at Community Basics, created a Strategic Plan with actionable, measurable goals to guide Community Basics into the future. This document is intended to be a living document that becomes a part of regular operations with oversight from the Board and implementation by the staff.

We value and appreciate the support and involvement of the various shareholders who participated in the strategic planning process.





Strategic Plan  
2021 - 2024

## PARTICIPANTS

We would like to thank the following individuals who participated in the planning process:

### **Board of Directors**

James J. Wagner, Chair  
Jack Crowley, Vice Chair  
Marshall Snively, Treasurer  
Jane Lee, Secretary  
Charlene Kachnoskie

### **Staff**

Lisa A. Greener, Executive Director  
Jo A. Raff, Director of Property Management  
Ellen Wright-Burkholder, Administrative Assistant  
Tammie Fitzpatrick, Director of Development  
Signe Henkel, Director of Finance

### **Focus Group Members**

Ray D'Agostino, Lanc Co Commissioner  
Josh Bantz, McKonly & Asbury  
Jeff Bohlen, Cornerstone Architects  
Josh Druce, Coalition for Smart Growth  
Pete Egan, CH&E  
Jess King, City of Lancaster  
Mike McKenna, Tabor  
Shelby Nauman, LHOP  
David Swartley, Moravian Manor





Strategic Plan  
2021 - 2024

## MISSION, VISION, VALUES

A first step for any organization is to ensure that it has a clear understanding and agreement of the organizational purpose, direction and values. A series of interviews and meetings were conducted in order to review and clarify the values, vision, and mission of Community Basics, Inc.

### **MISSION**

Create and manage high-quality, affordable housing in Central PA and the surrounding areas

### **VISION**

All people live in a place they are proud to call home

### **VALUES**

#### **High Quality**

*High quality in our products, processes, and services*

#### **Dignity and Compassion for All**

#### **Collaboration**

*Collaborative partnerships for long-term impact*

#### **Resilience**

*Resilient in the pursuit of our goals*



## DIFFERENTIATORS OF COMMUNITY BASICS

- Our size – small but mighty, quick and nimble, responsive
- Focus on affordable housing and homeless
- CHDO certification
- People drive our decisions, not money (residents/clients)
- Collaborate with industry partners
- Up for the challenge (especially in this market)
- Passionate about what we do – strong relationships
- Our management (Competitors = Mission 1<sup>st</sup>, Presbyterian, HDC)
- Lancaster is a priority; local presence and focus
- Female-led organization
- Relationships drive opportunities
- Consistency in leadership (between staff and Board)
- Homeless housing component

## OPPORTUNITIES FOR COMMUNITY BASICS

- Good project pipeline
- General sentiment and awareness of the need for affordable housing in Lancaster County
- Advocacy for affordable housing is rising
- Create a supportive services department
- Preservation of our older projects
- Raise our profile in the community
- Think creatively in imagining other ways to do development
- Partnering with other developer opportunities (e.g. Oregon Village, Moravian Manor, etc.)
- State LIHTC
- Partnerships with regional and national developers
- Develop relationships with other foundations – i.e. High, Steinman, etc.
- Website / branding / telling our story

## THREATS FACING COMMUNITY BASICS

- Increases in land prices
- LIHTC changes
- Competition for funding
- Limited public funding
- NIMBY (Not In My Back Yard) mindset
- Regional and national developers
- Market-rate development
- Funding dries up – not awarded another project
- PHFA funding being fickle
- Team capacity – burn-out risk – discouragement
- Increase in operating costs



## UTILIZING THE PLAN

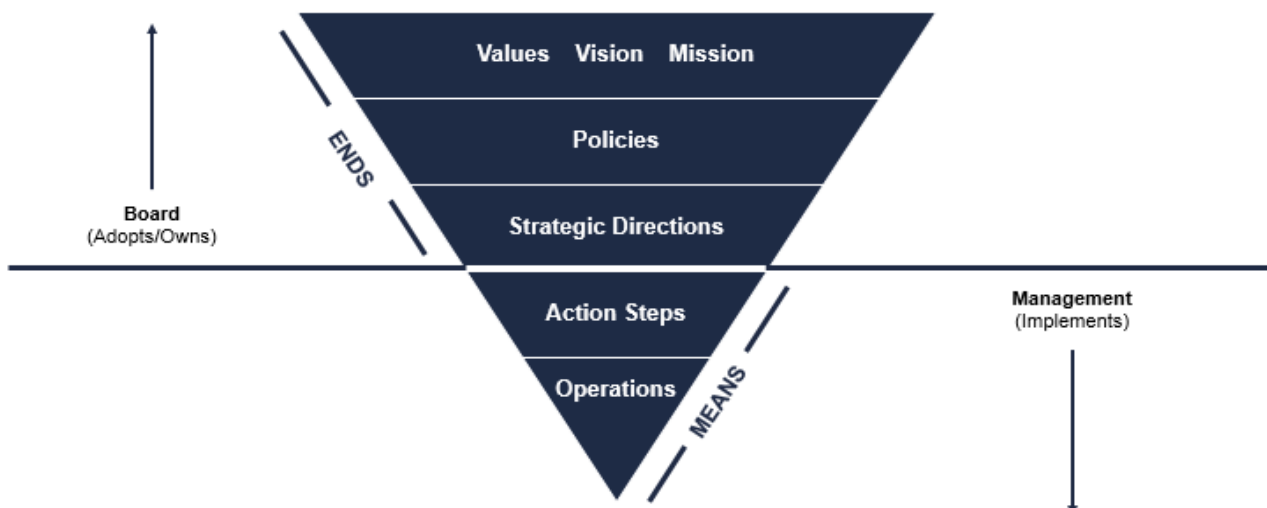
The Community Basics Board of Directors developed the following overarching areas of focus for the Strategic Plan:

- Our Team
- Operations
- Identity within the Community
- Development
- Finance
- Board
- Organizational DEI

The full staff and Board of Directors developed the actions steps necessary to carry out the strategic directions identified for each area of focus. The action steps documented on the following pages will be implemented by the staff and reviewed at regularly held leadership meetings. Action steps assigned to the “Board” area of focus will be the responsibility of the Board.

It is the responsibility of the Executive Director to provide regular updates to the Board on the progress being made to accomplish the Strategic Plan. Adjustments to the Strategic Plan can be made as needed.

The following diagram can be utilized to differentiate between the responsibilities of the Board and the responsibilities of the Executive Director / staff.





## STRATEGIC PLAN

### OUR TEAM

1. Ensure our staff are well cared for and engaged
2. Define a succession plan for key members of our team
3. Provide increased opportunities for professional development of our staff

### OPERATIONS

4. 1. Increase the utilization of technology to optimize efficiency and increase capacity
5. Maintain our reputation of high-quality housing and care for residents
6. Evaluate the feasibility of providing support services in-house

### IDENTITY WITHIN THE COMMUNITY

7. Increase public awareness of who we are
8. Develop and strengthen strategic relationships to increase future opportunities
9. Seek opportunities to advance affordable housing

### DEVELOPMENT

10. Maintain and increase project pipeline with the goal of being awarded a project every other year
11. Build and strengthen collaborative relationships
12. Identify new and creative ways to do projects and services
13. Preserve / renovate older properties

### FINANCE

14. Maintain financial strength (3 years of cash on hand to operate without a project)
15. Financial sustainability for CBI



Strategic Plan  
2021 - 2024

BOARD
16. Ensure continued high engagement from Board members
17. Increase the size and diversity of our Board
18. Develop an onboarding and orientation process for new Board members

ORGANIZATIONAL DEI
19. Ensure Board diversity & training
20. Ensure DEI Staff training
21. Develop organizational guidance for partner and vendor relations through a DEI lens