

LONGVIEW

Longview Housing Authority

Longview, Washington

Strategic Plan

2005-2015



September 1, 2004

Fourth Draft


Adopted by LHA Board of Commissioners

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BACKGROUND

Section I

Background


Longview Housing Authority (LHA)

Executive Summary of the Plan

The purpose of this Strategic Plan is to guide the Longview Housing Authority (LHA) through the next ten years by both articulating the organization's mission and subsequently identifying the goals that LHA will strive to meet in honoring that mission.

The plan lays out the context for LHA's mission by outlining the community's needs, identifying gaps in the marketplace and defining areas that LHA should focus on during the life of this plan from 2004-2014. The plan articulates the roles that the organization should undertake and sets specific goals for each of the business lines that LHA will specialize in during the next two, five and ten-year periods.

Rather than serve solely as a guide, this plan is intended to be a living document and should be used by the Staff and Board as a measuring stick to gauge progress and successes. To maintain its integrity, the plan should be updated at least every two years to take into account changes in the marketplace, community conditions, staffing and the local and regional economy.



The Planning Process

This strategic plan was created through a collaborative process that included LHA staff, board members, and community stakeholders with the assistance of consultant.


LHA began the process in September of 2003 by engaging a consultant from Local Initiatives Support Corporation to facilitate the planning process. The first steps in the process included interviews over a two-day period with staff, Board Members and community stakeholders, (List of the interviewees is attached in Appendix I). The interviews revealed key issues and organizational concerns that formed the foundation for the structure of a planning retreat.

The members of the Board of Directors and the Executive Director met in an all-day planning session on November 15, 2003, facilitated by the consultant, (List of the session participants is attached in Appendix I). This plan is the result of those deliberations and was drafted by the consultant in cooperation with the Executive Director and the Board.

City of Longview

Location and Economic Conditions

Longview is located in western Washington, approximately two hours south of Seattle and one hour north of Portland, Oregon. It was chartered in 1923 and was designed in a grid pattern with a central downtown park system, where wide streets are complemented with green areas. Longview has benefited over the years from a number of economic activities and resources including the development of the Columbia River Basin, the development of the logging and paper industries and the growth of the Portland Metro area. The presence of diversified industries and its workers makes the population of Longview and its economic base both unique and diverse for a small town.



Appendix II illustrates income cluster information from Claritas (a leading market research firm). It shows lifestyle segmentation of the Longview market when analyzing zip codes for Longview and the surrounding three counties. Review of these clusters indicates a widely varied population based on income analysis, and further supports LHA's plan to evolve beyond housing production into additional lines of business that are described later in this report. As Longview and the surrounding communities are quite diverse, so must LHA become diverse as the housing and economic demands of the population range widely.

History of the City


Longview was platted in 1923 in a traditional grid pattern and incorporated in 1924. The first accounts of the area were included in the Lewis and Clark Expedition Journals from 1805. The first settlement was founded in 1849 with settlers coming from throughout the region.

The city was conceived and planned by the private sector. The major impetus for the foundation of the city was the growing timber industry and its need for ancillary services and complementary industries such as lumber mills.

The city has developed as a regional manufacturing and service center because of its proximity to transportation corridors and the availability of its port facilities.

The city's population growth has slowed from the period from 1990-2000 but still is growing at a rate less than 1% annually. The counties around Longview are also growing, particularly as a result of in-migration from the Portland metro region.

However, for all that is good in Longview, there remains a degree of physical blight and negative perceptions of conditions downtown. The recent past has seen growing support for a more proactive approach to housing and commercial development near the downtown.



HISTORICAL

History of LHA

Founding and Purpose

The Board of Commissioners of the Longview Housing Authority formed the Housing Authority in 1975. The purpose of this organization was to administer the Section 8 Rental Assistance Program in Longview and other areas of Cowlitz County.


Since the founding of the Authority, the scope of the organization has grown to include:

- Transitional Housing
- Bond Financing
- Housing Development
- Property Management
- Family Self-Sufficiency Program
- Section 8 Homeownership program
- Homeownership Rehabilitation Program
- Contract Program Administration for other agencies
- Rural Housing 515

In addition to an expansion in the scope of services offered, the Housing Authority has expanded its service area to include the counties of Pacific and Wahkiakum.

Longview Housing Authority and Its Mission

The Board of the Longview Housing Authority (**LHA**) includes six Commissioners who are appointed by the mayor and city council, including one resident Commissioner. The staff of LHA includes Chris Pegg, the Executive Director of the Longview Housing Authority and 28 additional employees. An organizational chart is included as Appendix III.



The Housing Authority staff handles operations and management of all LHA properties. LHA's property management operations complement the mission of the Housing Authority and assist the clients of the Housing Authority by providing additional housing options.

As a Washington State Housing Authority, LHA is a tax-exempt entity.


Pacific Housing and Economic Pathways Group (PHEPG), its subsidiary organization, is a vehicle that allows for the development of affordable housing and complementary business lines outside of the structures under which a local housing authority typically operates. LHA is at the forefront of change in the assisted housing industry. This change is propelling local authorities to expand their capabilities to meet their mission of providing opportunities for affordable housing. This change does not limit the mission of LHA by geography, clientele or business lines.

*Housing and Development in the City of Longview, City of Kelso, Cowlitz County,
Pacific County and Wahkiakum County*

Needs

The City of Longview and the surrounding region have a myriad of needs:

- Redevelopment/Development of Housing
 - Vacant Rental and Owner Occupied Housing
 - Mixed Income Housing
 - Special Needs Housing
- Increased Homeownership
- Downtown Development
- Commercial Development
- Employment Opportunities
- Job Training



These needs are illustrated in the following statistics for the Longview area from the “Consolidated Housing Plan for Longview-Kelso June 2000”, the “The Statewide Housing Market Study/ Housing Needs Analysis” and from the 2000 U.S. Census.

The cities of Longview and Kelso, Pacific County and Wahkiakum County have a vacancy rate (see table on page 8) that is higher than the state wide average of 7%. The vacancy rate in Pacific County is skewed by the high number of seasonal and migrant housing units available.

The Statewide Housing Analysis identifies the need for the development of more than 4,000 affordable units to meet current demand for housing. This need is spread across the cities and the three counties. The greatest need was identified for Cowlitz County (approximately 3,800 units). The level of need for new units in Cowlitz and Pacific Counties is estimated to be at 40% of the number of low income households in the counties. (See Housing Needs Assessment on page 11)

This means that the available subsidized and affordable units are meeting only 60% of the current demand for units. This opens up a market for LHA services that is currently not being met.

The “Consolidated Housing Plan for Longview-Kelso June 2000” identified the need for rehabilitation of more than 500 substandard and vacant units. The need to revitalize this stock is key in the downtown area of Longview where the need to increase residency has been identified as a priority by the city and the business community.

Demand for housing for the elderly, disabled and other special needs populations is growing in all three counties. The Housing Authority has developed elderly only units and given the level of demand as stated in the Consolidated Plan and borne out by the Housing Authority’s waiting lists for Housing Choice Voucher Assistance and subsidized units, can justify increasing its inventory of special needs units.

POPULATION AND HOUSING STATISTICS 2000

	Longview- Kelso	Cowlitz County	Pacific County	Wahkiakum County	Washington State
Population	45,350	89,400	20,844	3,787	5,987,973
Total Housing units	18,715	38,624	13,991	1,792	2,451,075
Total occupied housing units	17,612	35,850	9,056	1,553	2,271,398
Owner occupied units	10,572	24,252	6,796	1,237	1,467,009
Renter-occupied units	8,183	11,598	2,300	316	804,389
Vacant units	1,600	2,774	4,895	239	179,677
Vacant Rental	919	1213	267	17	50,887
Vacant For Sale	298	642	387	45	27,255
Vacant Other (seasonal, migrant)	593	919	4,241	287	101,535
Persons Below Poverty		14%	14.4%	8. %	10.6%
Persons with Disabilities		18,538	5,410	826	981,007

Source: US Census 2000



Trends

The City of Longview has an ambitious plan to increase the level of employment in the community in the near and the long-term. Increased employment is the major goal of the city of Longview.

There are secondary priorities to be dealt with in the City of Longview:

- Downtown revitalization
- Neighborhood regeneration
- Infrastructure Improvements
- School Improvements

The Consolidated Plan identified several housing needs particularly the rehabilitation of vacant, substandard structures. The city and the business community have articulated a need to address housing conditions in the downtown area of Longview. The revitalization of housing and commercial structures in the downtown area is an identified need that the Housing Authority could address through a rehabilitation program funded through commercial sources, such as Main Street Programs, the Office of Community Services at the Department of Health and Human Services or the New Markets Tax Credit Program.

Demand from Portland Metro Area

The housing in the Longview area is more affordable than housing throughout the Portland metro area and areas of Washington State. Affordability in Longview is greater for both single family and rental units.

Housing costs in Longview and the three counties are significantly lower than the statewide median costs for housing, both rental and homeownership. (See page 10 –Tables on costs for housing). The relatively low cost of housing is increasing the in-migration from the Portland Metro area.



Appendix II illustrates the skewing of household incomes in the three counties. The majority of households in all three counties have incomes less than \$50,000 a year. There is a significant market segment in the region that can afford market rate housing and upscale development. The market rate segment could be an attractive market for any future development that would include mixed incomes. This type of development would allow the Housing Authority to use development profits to subsidize the development of affordable units.

HOUSING COSTS FOR OWNER-OCCUPIED HOUSING IN 2002

	LONGVIEW	KELSO	COWLITZ COUNTY	PACIFIC COUNTY	WAHIAKUM COUNTY	WASHING- TON STATE
Median Value	\$96,000	\$122,300	\$129,000	\$102,700	\$147,500	\$168,300
Median Asked Price	\$77,100	\$100,700	\$92,500	\$89,700	\$129,000	\$138,600
Median Housing Costs	\$884	\$944	\$996	\$841	\$1,046	\$1,268

Source: Consolidated Housing Plan for Longview-Kelso June 2000 and the Statewide Housing Market Study/ Housing Needs Analysis

HOUSING COSTS FOR RENTAL HOUSING IN 2002

	LONG- VIEW	KELSO	COWLITZ COUNTY	PACIFIC COUNTY	WAHIAKUM COUNTY	WASHING- TON STATE
Gross Rent	\$507	\$511	\$518	\$483	\$519	\$663
Median Contract Rent	\$437	\$458	\$459	\$400	\$452	\$593

Source: Statewide Housing Market Study/ Housing Needs Analysis

AFFORDABLE HOUSING UNITS NEEDED

	COWLITZ COUNTY	PACIFIC COUNTY	WAHAKIACUM COUNTY	WASHINGTON STATE
# of Households	9,063	2,024	368	507,254
0BR Need	5,831	1,316	299	362,437
1BR Need	372	150	18	20,000
2+BR Need	2,860	559	51	124,817

Source: Consolidated Housing Plan for Longview-Kelso June 2000 and Statewide Housing Market Study/ Housing Needs Analysis

HOUSING NEEDS ASSESSMENT

	COWLITZ COUNTY	PACIFIC COUNTY	WAHAKIACUM COUNTY	WASHINGTON STATE
Maximum Affordable Rent	\$453	\$321	\$386	\$587
#of Affordable Market Units	1,499	0	0	83,410
Subsidized Units	1,121	268	37	70,959
Low-income Homeowners	2,545	921	238	145,884
Units Needed	3,898	835	93	207,001
Need as a % of Households	43%	41.3%	25.2%	40.8%

Source: Consolidated Housing Plan for Longview-Kelso June 2000

MISSION

Section II

2004-2014

LHA Mission



Mission Statement


Our mission is to provide opportunities for people who experience barriers to housing and self-sufficiency because of income, disability or special needs in an environment which promotes dignity and encourages personal responsibility.



Context

In articulating the mission statement, the Board looked at several key elements embedded in the statement that are components of its vision of the mission of LHA:

- Quality of Life is key to the vitality of the community;
- “Community” for LHA is beyond the City of Longview and includes Cowlitz County, Pacific County and Wahkiakum;
- LHA is not limited to specific lines of business;
- The importance of housing as a neighborhood revitalization catalyst is fundamental to the mission;
- There is a proven need for economic development and the provision of opportunities for the residents;
- It is important to improve the quality of life in the City of Longview through the revitalization of existing housing and the creation of new housing;
- It is part of LHA’s mission to improve the quality of life of low and moderate-income residents of Washington;
- LHA intends to develop housing and asset building opportunities for low and moderate-income residents of the greater Longview area;
- It is the goal of the staff and the Board to be the best Local Housing Authority in Washington;
- It is LHA’s intent to build and manage housing in an ethical, professional and efficient manner;
- It is LHA’s long-term goal to be the preferred provider of affordable housing in Longview, Cowlitz County, Pacific County and Wahkiakum County.



Board and Staff Roles

To become an effective, efficient and progressive agency, the Board and staff must adopt complementary but not overlapping roles. The Board of LHA is key to establishing the on-going policies and future goals of the organization and to motivate and oversee the managers of LHA. The staff's role is to implement the Board's vision for the organization, to refine and set goals with the input of the Board, and manage day-to-day operations.

The Board is also part of the organization's link to the community. The Board, by effectively recruiting representative stakeholders for inclusion as Board Members, ensures the relevance of the organization's mission to the community.

The Staff of LHA has an obligation to keep the Board informed both about the key events, critical issues and public perspective of LHA and the current industry trends. As the provision of affordable housing shifts from the public to the private sector, the operations of LHA must conform to changes in the marketplace. Articulated below are the roles of the staff and the Board:

Staff

Development	Resources, Housing, Commercial
Capacity Building	Staff, Residents, Community
Operations	Housing Authority, Affiliates
Property Management	LHA portfolio, Contract Management
Board Support	Education, Information
Policy development	National and Local industry
External Relations	City, State, County, Funders, Community, Residents, Service Providers

Board

Community Relations	Elected Officials, Residents, Business
Board Recruitment	
Set vision and approve policies	



Current

Currently, LHA is engaged in housing development activities in Longview and Cowlitz County, Pacific County and Wahkiakum County. The Board of Directors seems satisfied with this approach and believes that it is extremely important that LHA expand geographically in an orderly fashion. The opinion of community stakeholders however, is that LHA should expand its operations in the counties in the near term because of the need. In response to this need in Pacific County, LHA has entered into a management contract to staff the newly formed Joint Pacific County Housing Authority.

The efficiency and effectiveness of a larger organization is an incentive for LHA to plan expansion of the market and role of the organization.

Proposed

LHA will pursue geographic expansion opportunities as other development agencies request assistance from LHA, where LHA can participate in development activities on a fee basis. These would typically come in the form of developer fees, consulting fees or property management fees and they would be agreed upon prior to LHA engagement. As LHA considers opportunities to expand, it recognizes that it is a business designed to aid the population of Longview, and any expansions beyond Longview must contribute to a financially secure and stable business.

AREAS FOR EXPANSION BY YEAR

	2005-2007	2007-2010	2010-2015
County	X	X	X
Region	X	X	X
State			
Northwest (as needed)			



Context

The need for the development of affordable housing within the Counties and the State is high. The “Statewide Housing Market Study/ Housing Needs Analysis” estimates the need for affordable housing units as 207,001 additional units based upon increases in population and numbers of households being formed. This number does not take into account the number of units that will need replacement because of physical deterioration and those units lost to expiring use of Section 8 subsidy and Low Income Housing Tax Credits. There will be a need to provide homeownership opportunities to these new households, it is estimated that there will be more than 750 additional families with incomes between 51 and 80 percent of AMI. This number will increase the demand for homeownership assistance low-income and first-time homebuyers.


ROLES

Roles for LHA

Lines of Business

During the development of this plan, the idea surfaced several times that LHA should expand into various lines of business beyond single-family and multi-family housing development. The following chart indicates the conclusions of the Board of Directors during the planning retreat.

	Current	2004-2014
Development		
<u>Housing</u>		
Multi family	X	
Single family	X	
Student		X
Special Needs		X
Youth at Risk		X
<u>Commercial</u>		X
Retail (if included in development of mixed-income communities)		X
Facilities		
Small business incubators		X
		X
Property Management	X	X
Construction		X
Lending		X
Landscaping		
Job Training – housing rehab, rental cleaning and maintenance, child care		X



Housing Development

Housing Development is a staple activity for most Housing Authorities (HAs) throughout the country. Providing safe and affordable housing at price points, or in locations typically disregarded by the private sector is how many HAs generate operating revenues to support operations. LHA has this same opportunity.

Multi-Family – Development of multifamily housing is key to the long-term success of LHA. Multifamily housing can be any or all of the following: condos, student housing, assisted living, garden apartments, elderly-only, disabled-only or family units. To date, LHA has very successfully developed several projects using different bond pools from the State of Washington. During, and upon completion of current projects, LHA will continue to operate opportunistically to identify additional projects. LHA realizes that, in addition to development fees, the property management fees associated with development will provide an on-going stream of revenue with which to build the organization.

As opportunities arise to develop LIHTC projects, LHA will look to participate in the development process as either the developer or as a development partner to other organizations that are pursuing projects

Single Family - There is a projected growth of more than 750 households between 50 and 80% of AMI in the three county area over the next 10 years. This suggests that there will be an increasing demand for affordable for-sales units. In addition, LHA has the expertise and the staff to deal with credit and counseling issues, which are the greatest weaknesses of low and moderate-income homebuyers. Access to subsidy for down payments, development costs and mortgage assistance, will give LHA an additional edge in developing for-sales opportunities.

Student - There may be some future opportunities to develop student housing in Longview or other nearby areas. LHA will maintain ongoing relationships with local colleges and universities in an effort to participate in the discussions involving student housing needs and development opportunities. This is not considered a priority to LHA, but an opportunity to develop, and possibly manage, housing dedicated to students thus relieving some of the pressure on the affordable housing market in the Longview area.




Commercial Development

For the purposes of this strategic plan, commercial development shall include retail, office, and facilities (daycare, charter schools, community centers, etc). Over the past ten years HAs have begun to recognize the need to return goods and services to their neighborhoods. As such, many HAs nationally are expanding beyond their traditional roles as housing developers to also include the development of commercial space including supermarkets, strip centers, office buildings, daycare/childcare facilities, Laundromats, telephone call centers and others.

During this same ten-year period, various community development stakeholders and supporters have designed programs to help facilitate these development activities. As an example, the Federal Home Loan Bank of Seattle offers several programs that enable HAs to access flexible financing for economic development projects. Several of these programs will be presented below.

Retail – LHA will pursue the development of retail space for lease to qualified tenants that will increase the quality, availability, and selection of goods in the Longview area. This retail development could take on the form of individual “out parcels” where there is a significant market opportunity and an interested tenant, where the commercial development is incidental to housing, builds community, diversifies the financial base of the agency and/or provides wealth generating opportunities to low and middle income citizens. LHA will build and maintain a relationship with the Federal Home Loan Bank of Seattle, where it will apply for grant and loan assistance for its small retail development projects.

Facilities – LHA will pursue the development of community facilities and childcare in a similar fashion to the above retail development. With a focus on opportunity and feasibility, LHA will analyze the project costs, revenues, subsidy, tenants, and availability of land to make an initial determination of project potential. In addition, LHA will look for opportunities to include job training for local low-income individuals as a component of these development activities.




Property Management

LHA may pursue some property management opportunities, primarily for other non-profit service providers, on a for-profit fee-for-service basis. Many private property owners will periodically solicit property management firms for management services. LHA will work to position itself to respond to these management opportunities where the location, property type, management requirements, and other variables are conducive to LHA's skills and cost structure. LHA will only pursue these opportunities where profits are projected to be sufficient to justify the effort. Expansion of property management services into the marketplace is a natural growth area for LHA and should be considered whenever opportunities present themselves.

Preferred Renter Program

As a rental property owner and provider of rental subsidies within the communities we serve, LHA recognizes the importance of developing programs and providing training opportunities that will improve the relationship between the landlords and tenants we serve. In light of this, LHA will develop a *Preferred Renter Program*. This program will be modeled after the successful program developed by the Portland Housing Center to provide a new start for people having difficulty getting rental housing. It will help people with poor or no credit or rental history access housing by doing the specific things they personally need to do in order to find and keep a good place to live. Upon successful completion of the program, participants will receive a diploma. Prospective renters can use this during their housing search to demonstrate to prospective landlords their positive effort and accomplishment.



Rental Maintenance and Cleaning

As LHA increases the number of units developed and managed by the corporation, it increases the demand for services to maintain the quality of the stock. There is additional demand in the rental market for rental cleaning and maintenance. This presents an opportunity for LHA to establish a company that would provide carpentry, electrical, plumbing, HVAC, and roofing trades. LHA will look for opportunities to include on-the-job training opportunities for program participants.

Lending

Many HAs find that low and moderate-income neighborhoods lack financial resources for the capitalization of small and expanding business, resident home improvements, and the development of community facilities such as daycare. LHA will pursue efforts to capitalize a community loan fund that would manage capital for investment in rehabilitation and construction of new housing in low and moderate-income neighborhoods. The loan fund will likely be structured as a hybrid of three types/models of community development financial institutions including the Community Development Loan Fund, the Community Development Venture Capital Fund, and the Micro-enterprise Development Loan Fund models as described below:

Community Development Loan Fund	Aggregates capital from individuals and institutional social investors at below-market rates and re-lends this money primarily to non-profit housing and business developers in urban and rural lower-income communities. May also make loans to individuals and
Community Development Venture Capital	Provides equity and debt financing with equity features for small or medium-sized businesses to create jobs, entrepreneurial capacity and wealth that benefit low-income people and communities
Micro-enterprise Development Loan Fund	Fosters social and business development through loans and technical assistance to low-income people involved in very small businesses or the self-employed that are unable to access conventional credit

PARTNERS

Anecdotal demand surfaced during this strategic planning process for elements of each of these types of funds and LHA may be best served to develop a general loan fund with the flexibility to serve each of the market sectors as needed.

In addition, LHA will pursue funding, most likely Community Development Block Grant Funds, to capitalize the formation of a low-income homeowner maintenance and repair fund. There is an excellent model of this program currently underway in Kansas City, KS.



Partners

The following lists indicate various partners that will be important to the long-term success of LHA and may be critical to the development and financing of individual projects. This list is not all-inclusive and will change over time as needs and opportunities for new partnerships present themselves.


Government	City Of Longview
	Cities of Kelso and Kalama
	Cowlitz County
	Pacific County
	Wahkiakum County
	State Of Washington
	Washington State Housing Finance Commission
	US Dep't of Housing and Urban Development
	US Dep't of Health and Human Services, Office of Community Service
	Longview Economic Development Partnership
	Department of Justice
Corporate	Weyerhaeuser
	Longview Fibre
	Construction Companies
	Commercial, Retail Tenants
	Developers and Development Consultants
	Realtors
	I.P.
	Hospital
	Steelscape
	Burlington Northern, Northern Pacific
	Foster Farms
Educational	Lower Columbia College
	School Districts
	Small Business Administration/SCORE
Financial	Federal Home Loan Bank of Seattle
	Traditional Banks, Cowlitz Bank, Riverview, Columbia and Bank of Pacific
	Low Income Housing Tax Credit Syndicators
	Community Development Financial Intermediaries
	New Markets Tax Credit Syndicators or Investors
Non-Profit	Emergency Support Shelter
	Urban Land Institute
	National Association of Housing Redevelopment Officials
	Longview Chamber Of Commerce
	Community House on Broadway
	Community Action Agencies
	Housing Authority of the City Of Kelso
	Housing Authority of the City Of Kalama
	Joint Pacific County Housing Authority



Others	
	Potential Residents
	Association of Washington Housing Authorities
	Community Stakeholders
	LIHTC Eligible Residents
	Qualified Low and Moderate Income Homebuyers
	New Markets Tax Credit Syndicators or Investors
Non-Profit	Emergency Support Shelter
	Urban Land Institute
	National Association of Housing Redevelopment Officials
	Longview Chamber Of Commerce
	Community House on Broadway
	Community Action Agencies
	Housing Authority of the City Of Kelso
	Housing Authority of the City Of Kalama
	Joint Pacific County Housing Authority
Others	
	Potential Residents
	Association of Washington Housing Authorities
	Community Stakeholders
	LIHTC Eligible Residents
	Qualified Low and Moderate Income Homebuyers

GOALS

	<u>Housing Rental/Tax Credits</u>	<u>Housing For-Sale</u>	<u>Commercial / Retail</u>	<u>Property Management</u>	<u>Business Development</u>	<u>Lending</u>	<u>Training</u>
2 years 2005- 2006	Develop a non-profit affiliate 100 units a year/ 10 units market rate 200 units total	10 units per year 20 units total		328 units owned by LHA Additional: 52 USDA 150 Tax Credit	Develop a Rental cleaning and Maintenance business	Set-up CDFI within two years/ \$100,000 loan fund Set-up a Low-Income Homeowner Maintenance Fund	Small Business Development Program Set-up Develop a Preferred Renters Program for program participants
5 years 2005- 2010	100 units a year/ 10 units market rate 50 units of student housing 550 units total	10 units per year 50 units total	Begin Development Activities of 1 project if indicated as part of a current housing development project	380 units owned by LHA plus 150 tax credit units Additional: 50 affordable units 400 Tax Credit 100 units owned by others	Training 10 persons/year 50 total	\$500,000 loan fund	Training 50 persons/year 500 total
10 years 2010- 2015	100 units a year/ 10 units market rate 500 units total	10 units per year 50 units total	Complete 2 developments	420 units owned by LHA plus 450 tax credit units Additional: 50 affordable units 400 Tax Credit 100 owned by others	Training 10 persons/year 50 total	\$500,000 loan fund	Training 50 persons/year 500 total
TOTAL 2005- 2015	1250 units	120 units	2 projects or 20,000 sf	470 units owned by LHA 750 Tax Credit units owned by subsidiary 200 units owned by others	100 persons	\$1,000,000 loan fund	1000 persons



CONDITIONS

Conditions for Development

LHA has at its disposal a great many tools that will enable the ongoing development of housing, commercial and community space, economic opportunities and business development opportunities. Some of these are listed below. Unfortunately, LHA has also identified gaps that exist in its toolbox that must be filled. Some more obvious gaps are listed below, but obviously this list will evolve as LHA further expands its operations and activities.


Tools

To be a successful and financially stable corporation, the business climate must be encouraging and basic tools of development must be available to LHA. LHA will pursue formation of a non-profit affiliate as an additional tool in the development of housing. LHA is fortunate that the current economic climate, low mortgage and lending rates, make this an opportune time to develop housing and that the geographical area of LHA's concentration is primed for development. The following seven tools are all available to LHA or obtainable:

- Access to Capital
- Technical skills
- Affordable Land
- Demand for Affordable and Market Rate Housing
- Board Support
- Government Support
- Community Support

Techniques

Financing can sometimes be more difficult for HAs to obtain due to the nature of the projects that they typically support. In response, a number of financing products and mechanism have been created, but these are often tied to specific projects or funding cycles.



LHA will need to work diligently to obtain and utilize various financing products including:

- Conventional Financing
- Flexible Financing
- Low Income Housing Tax Credits
- New Markets Tax Credits
- EDGE – Economic Development Growth Enhancement Grants
- OCS – US-Dep’t of Health and Human Services, Office of Community Services Grants
- EDA – US-Department of Commerce, Economic Development Administration Grants

Appendix IV describes the various funding and financial resources available for housing development.

PARTNERSHIPS

Partnerships




The Housing Authority will be seeking to partner with the private sector; financial institutions, developers, corporations and development intermediaries to implement the goals of this plan. The development of quality housing that is affordable to the residents of the Longview community is a private-public partnership that the Housing Authority will grow along with its portfolio and lines of business.

IMAGE

Marketing, Image, Publicity



LHA recognizes that as it evolves to include more sophisticated and complex development activities as well as simply expanding its product offerings, it must begin to engage in increased marketing and public relations campaigns. Additionally, LHA is closely aligned to the housing authority; there may be a tendency for the public to negatively view the activities of LHA. Therefore, it must develop positive marketing brochures and conduct periodic marketing activities to ensure that it is properly perceived as an agency involved in improving Longview.




LHA new level of PR and marketing campaign will be designed to increase LHA fundraising opportunities both within the Longview community and within LHA's broader service area.

Specific recommendations include

- Annual Report – LHA will develop and distribute an annual report that showcases its annual accomplishments.
- Events – LHA will sponsor community events to generate name recognition and to build relationships with other community organizations.
- Annual Event – LHA will consider starting its own annual event that would directly benefit the low- and moderate-income population in the area.
- LHA will develop a fundraising plan and incorporate to the plan an approach to enable the stewardship of Funders/partners in a responsible manner.

LHA will begin to address the above activities by developing a public relations plan that will inform these activities. This PR plan will also include specific roles for Board Members and staff in this area of work and divisions of labor and responsibility should be designated.



TRAINING

Training and Staff Development

The long-term viability of the organization rests in the quality and the ability of the staff. In order to insure that the staff of LHA continues to be of the highest caliber, the following policies will be adopted as a part of this plan:

Recruitment

LHA will continue to recruit staff locally and nationally. Realizing that community-based knowledge can be of assistance to staff, LHA will recruit in the community and will make career opportunities available to clients and residents of LHA properties. LHA will also recruit staff nationally if the properly skilled individuals are not local residents.

Retention

LHA will continue to follow a pattern of practice that encourages the retention of staff. This will include career path positions, staff development opportunities and the encouragement of creative thinking.

Development


Personal and technical development of all staff members will remain a priority. Opportunities for training and education will be made available on a continuing basis. Staff will have the opportunities for field visits and attendance at conference to broaden their base of knowledge.

LEADERSHIP

Leadership and Succession



The following policies are being adopted as a part of this Strategic Plan to strengthen LHA's long-term viability and to continue its growth as an organization. An organization chart is shown on page 29 detailing the proposed structure as it relates to the Longview Housing Authority over the next ten years.



Recruitment

The Executive Director in cooperation with the Board will recruit Board Members for inclusion on the LHA Board who can continue the pattern of leadership shown by the current Board. The inclusion of community stakeholders on the Board is important to the ability of LHA to represent and serve a diverse community in the City of Longview and other areas in Washington.

Annual Review of Board and Staff

The Board is responsible, in coordination with Executive Director, to plan an annual review of the Strategic Plan, Board Performance and an evaluation of the Executive Director. This review process will allow the Executive Director and the Board to correct and supplement annual goals and to make modifications, as needed, to the strategic direction of the organization.

New Senior Staff

The Executive Director and the Board are committed to expanding the Senior Staff, as needed, based upon the growth and direction of the organization. The addition of new senior staff will be at the discretion of the Executive Director and will be coordinated with the growth in financial resources of the organization.

Succession Planning

The Board and Executive Director are in agreement that succession planning for the replacement of key staff is important to the future of LHA. The Executive Director will articulate a process for replacing key staff if necessary, and will work closely with the Board to plan a process that would minimize disruption in the operation of the organization if there were a change.

APPENDIX IX

Appendix I

Interviewees:

Chris Pegg - Longview Housing Authority Executive Director

John Crocker – Housing Authority Board Member and Chairman

Ron Kosloski – Housing Authority Board Member

Ed Ivey- Longview City Manager

Richard Fitzgerald – Cowlitz Bank

Ernie Ballou-Cowlitz Bank

Strategic Planning Retreat Participants:

Chris Pegg – Longview Housing Authority Executive Director

Ron Kosloski – Housing Authority Board Member Sandra

Martin – Housing Authority Board Member

Anne DeFrancisco – Housing Authority Board Member

Patricia Price – Housing Authority Board Member

Wayne Ostermiller – Housing Authority Board Member

Colleen Storms – CFO, Housing Authority Staff

Donna Setters– Housing Programs Supervisor, Housing Authority Staff



APPENDIX II

Income ranges	Cowlitz County	Pacific County	Wahkiakum County
Under \$10,000	10.6	14.4	13.8
\$10,000-19,999	16.7	23.9	19.3
\$20,000-29,999	14.3	18.2	14.9
\$30,000-39,999	12.7	13.1	17.5
\$40,000-49,999	11.7	9.8	13.2
\$50,000-59,999	10.2	6.5	7.7
\$60,000-74,999	10.0	5.8	5.0
\$75,000-99,999	8.5	5.0	4.4
\$100,000-149,999	3.8	2.1	1.8
\$150,000-249,999	1.1	.8	1.1
\$250,000 +	.3	.4	1.2

Source: Claritas Market Data 2003

LONGVIEW HOUSING AUTHORITY

Organizational Chart

as of March 1, 2003

