



Twin Pines Housing Trust
Strategic Plan
October 1, 2024 – September 30, 2029

Approved by Board of Trustees
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Executive Summary

For nearly 35 years, Twin Pines Housing Trust has built a track record in developing and sustaining high quality affordable housing in the Upper Valley of New England. To set a clear direction for its future, the organization engaged the Board and staff in a strategic planning process in 2024. The plan will be implemented from October 2024 through September 2029.

As part of this process, the organization sharpened its mission and articulated a set of values and practices to guide its work.

Mission Statement: Twin Pines Housing Trust strengthens the Upper Valley by creating and maintaining quality, affordable housing with supportive services.

We envision communities where every individual can live in stable, secure housing and access the resources they need for a healthy life.

Values: Worth and dignity for all people; resident-centered; integrity, honesty, and transparency; service; and compassion combined with professionalism. Embedded in all its work is a commitment to diversity, equity, and inclusion.

Twin Pines has set goals for greater impact in the community and for building its own organizational capacities.

Community Impact Goals

Real Estate Development: By 2029, the Twin Pines housing portfolio of affordable high-quality housing will be approximately 840 units, adding at least 300 (6-8 projects at optimum size of 40) to our existing portfolio. We will prevent any major loss of existing affordable housing through preservation activities when feasible.

Property Management: We will develop a plan for property operations for property management, asset management, and resident services to support portfolio growth and operating excellence. We strive to be known as the premiere affordable housing operations manager in the Upper Valley, highly regarded by all stakeholders, including residents, applicants, funders, lenders, regulators, town officials, neighbors, and community members.

Resident Services and Engagement: Twin Pines will preserve tenancies and enhance the quality of life for our residents through responsive service delivery, relationship building, and community engagement. Over the next five years, we will deepen our capacity to deliver proactive approaches to resident services and engagement, and actively listen to and respond to the voices of our residents.

Organizational Impact Goals

Staff Development: Twin Pines will invest resources to increase staff bandwidth and capacities needed to deliver on our mission and strategic plan goals. Cross organizational communication and collaboration will foster a healthy team environment where staff work towards common goals.

Resource Development: Twin Pines’ long-term vision is to significantly increase contributions from private philanthropy, individuals, and collaborative funding in association with businesses, institutions, and nonprofits. We will create a formal development plan annually accompanied by a disciplined process for donor solicitation, cultivation, and stewardship and leverage our 35th anniversary to raise our visibility and resource development outcomes.

Governance: Twin Pines recognizes the importance of effective governance practices and intends to invest in our own Board development process. Our goal is to ensure the Board is comprised of individuals with a variety and depth of skills, expertise, and backgrounds with a particular focus in the coming years of building our fundraising capacities.

Twin Pines will use annual workplans, data-driven dashboards, and quarterly meetings among the Board and staff to reflect on our progress in implementing this strategic plan and make adjustments as needed to further our impact.

Section I: Introduction and Background

Twin Pines Housing Trust launched a comprehensive strategic planning process at the beginning of 2024 to set the direction for our organization building on our nearly 35 years of impact in the Upper Valley. The planning process was led by an 11-member staff-board Strategic Planning Committee and facilitated by strategic planning consultants Diane Gordon and Judy Weber. Our work began with an assessment of our organization.

The plan will be implemented over a five-year period beginning in October 2024 and concluding in September 2029.

During the assessment process, we learned about our strengths, challenges and areas for improvement, and potential priorities and opportunities. These are summarized below. The plan incorporates those lessons and builds on our strengths.

Twin Pines' strengths include that we:

- Have an impressive track record of building quality affordable housing across two states to meet the needs of residents with a range of incomes.
- Are recognized as the pre-eminent developer of affordable housing in the Upper Valley.
- Are a respected partner, known for taking collaborative approaches.
- Have positive relationships with residents and are known for property management and services that are focused on keeping people housed.
- Employ and are led by a skilled, compassionate, and dedicated staff team, leadership, and board.

The organization will be in a stronger position when we:

- Build staff capacity: number of people, skills through training, delegation, and clarity of roles.
- Develop a comprehensive business plan for property management and resident services.
- Create more effective and transparent internal communications.
- Strengthen/ standardize and implement operating procedures and systems.
- Deepen ability to measure and report outcomes.
- Clarify the role of residents and invest in resident engagement strategies including on the board of directors.
- Develop a more robust process for expanding and diversifying revenue.

Section II: Mission, Vision, and Values

Mission Statement

Twin Pines Housing Trust strengthens the Upper Valley by creating and maintaining quality, affordable housing with supportive services.

We envision communities where every individual can live in stable, secure housing and access the resources they need for a healthy life.

Imaging the Future: Twin Pines Housing Trust in 2029

Twin Pines Housing Trust is a nationally recognized regional leader in the development and management of affordable housing for a wide range of individuals and families, meeting the needs along a spectrum from the chronically homeless to renters and first-time homeowners. Twin Pines helps to foster economic mobility for those interested in building their credit and purchasing a starter home. Since 2024, Twin Pines has grown its portfolio of affordable housing to 840 units across the Upper Valley in Vermont and New Hampshire.

Twin Pines is a best practice model for quality housing development, preventative maintenance, and service delivery to meet the needs of the diverse populations it serves. Strong partnerships with nonprofit service providers, businesses, and municipal governments enable Twin Pines to meet its goals and provide a seamless experience for residents. They provide access to a continuum of services that match the support residents need at different stages of their life.

Residents are leaders at their own properties, taking initiative to build healthy communities for adults and children. At the board of directors and on committees, their voice is heard and respected in setting the direction of the organization. Twin Pines is known for its leadership in diversity, equity, and inclusion initiatives.

Through effective public policy advocacy at the state and federal level, Twin Pines has been able to reduce housing and financial barriers for individuals and communities. Recognizing that they alone cannot meet the region's needs, they have catalyzed others to spur development. This has in part been made possible by a significant increase in private philanthropic contributions and the growth of loan funds such as the Upper Valley Loan Fund, a major joint resource development initiative among businesses, institutions, and nonprofits.

The organization has made significant investments in building its own capacities that has fostered its continued growth. Staff development and expansion has meant that the team has the skills and capacities to meet the organization's real estate development, resident leadership, and property operational needs. The Board and staff have an effective working relationship.

Investments in technology and infrastructure have led to more modern, efficient, and standardized systems. Resource development activities have increased the donor base and new local and national partnerships have been built. Improved property operations and management, along with increased revenue from contributions has enabled the business to sustain itself without reliance on development

fees. It has a strong financial position. With greater bandwidth, the organization has been able to invest in further innovations in meeting community and resident needs.

Values and Practices

1. **Worth and dignity for all people.** We treat everyone with respect and fairness – residents, employees, vendors, community members, and partners.
2. **Resident-centered.** We support residents in achieving their full potential, prioritizing the importance of keeping people housed. We provide access to resources, services, and supports to assist residents to meet their own goals.
3. **Integrity, honesty, and transparency.** We adhere to professional standards, applying policies consistently and evenly across the organization. We pride ourselves in being trustworthy, honest and loyal to the organization and the communities we serve.
4. **Service.** We are a service-focused organization, partnering with our residents, communities and investors to ensure the highest quality delivery of our programs and projects.
5. **Compassion combined with professionalism.** We operate with a double bottom line: balancing our grassroots mission-driven approaches with fiscal prudence and high management standards and practices.

Our approaches

- We intend to continue to be adaptive and innovative to solve the evolving housing challenges in the Upper Valley.
- We understand the nature of the issues we address are multifaceted and require partnerships and creativity to overcome obstacles, and an entrepreneurial approach to our work.
- We recognize the importance of perseverance and looking for solutions even when they are not immediately apparent.

DEI Vision

All those served by Twin Pines Housing are treated equitably, with respect and dignity, regardless of their race, color, national origin, religion, gender identity, familial and economic status, disability, age, sexual orientation, receipt of public assistance, or status as victims of abuse. Promoting diversity, equity and inclusion within the organization is rooted in an understanding of how power, privilege, and oppression impact our communities, our programs, our workforce, and ourselves.

Twin Pines is committed to intentionally creating inclusive environments where people feel safe, respected, valued, and heard. Twin Pines strives to break down biases - conscious and unconscious - to foster greater inclusion across its communities, workforce, and Board.

We believe this DEI work is essential to Twin Pines' effectiveness and commitment to our employees and the communities we serve. We recognize that inequities exist and are barriers to access to opportunity.

Only by actively assembling a diverse, inclusive team and nurturing an open, collaborative, and trusting environment, will Twin Pines be able to work towards addressing systems of injustice.

In practice this means we:

- Ensure diversity on our Board and our staff through thoughtful recruitment, hiring and training.
- Develop and market programs to ensure marginalized communities are able to reap the benefits of our work.
- Look for partnership opportunities with a wide variety of organizations and entities to enhance our ability to respond with best practices.

We are a community housing development organization. In practice one-third of our Board members are from low-income households. We value their participation, their voice, and their experience and perspectives in advancing the work of our organization.

Section III: Community Impact

Real Estate Development

Twin Pines' real estate development serves the needs of residents in the Upper Valley across a spectrum of incomes and circumstances. By 2029, the Twin Pines portfolio of affordable high-quality housing will be approximately 840 units, adding at least 300 to our existing portfolio. We will prevent any major loss of existing affordable housing through preservation activities when feasible.

High-Level Goals and Strategies

- 1. Successfully complete our pipeline projects to add 174 units of affordable housing in the region by 2026.**
 - a. Target populations: residents eligible for tax-credit financed housing and potentially workforce housing; current pipeline projects - Sykes Ave; New London; Mellishwood; and Hanover.
- 2. Increase the number of affordable housing units by net gain of 125 units (3-4 projects) in the region beyond the existing pipeline.**
 - a. Seek alternative funding sources and development opportunities outside the typical and limited state housing funding system.
 - b. Explore partnerships with local employers, for-profit and non-profit developers, municipalities, financial institutions, and educational institutions.
- 3. Preserve affordability of existing units by acquiring and renovating existing properties.**
 - a. Pro-actively identify naturally occurring affordable housing or existing properties that come to the market and combine properties to gain tax credits.
 - b. Retain the ability to be responsive and opportunistic in pursuing projects given our packaging expertise and local contacts. (The goal is to be opportunistic when looking at preserving affordable housing units that may come to market, as well as look at acquiring NOAH [naturally occurring affordable housing] properties.)
- 4. Preserve Twin Pines' current portfolio through asset management, recapitalization, and stewardship activities.**
 - a. Recapitalize 115 units in our current portfolio and identify future reinvestment needs each year as needed.
- 5. Build the capacity of the network of housing developers to increase production through advocacy, consulting, and serving as a catalyst for others.**
 - a. Provide technical assistance for a fee to help communities get started.
 - b. Advocate for inclusionary zoning changes Possible areas: City of Lebanon, Hanover.
- 6. Advocate with communities to address infrastructure challenges and advocate for the state and federal governments to play a significant role in addressing lack of infrastructure in communities that need/ want more affordable housing.**
 - a. Identify work communities need to do before we can consider a project with infrastructure being the biggest issue.

- b. Work closely with the Regional Planning Commissions.
- c. Educate municipalities as to how they need to prepare for increasing affordable housing.

7. Continue to increase affordable homeownership opportunities.

- a. Continue to add units through the buyer-driven homeownership program in VT (3-5 homes per year added to the portfolio).
- b. Complete additional homeownership units (one to two projects over 5 years with an additional 5-10 homes total).
- c. Support existing homeowners to refinance, resell their homes ensuring that long-term affordability is maintained.
- d. Provide access to first-time homebuyer training resources through collaborations with NeighborWorks.
- e. Bring resources to support BIPOC ownership to the Upper Valley

2024 - 2025 Priority Action Steps

1. Finalize development project selection criteria and process.

- a. Create a priority order to the criteria and clear process for how it will be used.
- b. Utilize the criteria for efficient and effective decision making about potential opportunities.
- c. Set thresholds (minimum criteria, optimal criteria), and a ranking system.
- d. Use the criteria to highlight the rationale for the deal including the risks and how they can be mitigated.
- e. Presentations to the board for future real estate projects should illustrate how the selection criteria were used.

2. Conduct market analysis and funding opportunities to justify locations and distinct population targets.

- a. Research and map availability of site infrastructure requirements and potential municipal partnerships.
 - Identify communities that have available properties with access to water and sewer infrastructure.
 - Identify communities that have municipal properties available for affordable housing and want to work with us.
 - Develop a description of an ideal Twin Pines project to share with municipalities: Planning and permitting approval; Infrastructure; Funding; Features that will make a project competitive for tax credits.
- b. Research funding priority of each state and other potential sources of funding. Evaluate a different mix of financing tools to increase production beyond tax credit funded projects.
- c. Meet with the towns with the most clear-cut opportunities - preliminary meetings each year with 5 more towns.

3. Finalize and prioritize approaches to growing the pipeline and use the data to set targets for increasing the supply of affordable housing over 5 years beyond what is already projected.

- a. Use criteria analysis to pursue projects.
- b. Build an inventory list of potential targets for growth.

4. Establish design and construction standards consistent with the goals of effective and efficient property management and maintenance.

- a. Identify which aspects of design and construction we should standardize based on efficiency, availability of labor to service systems, ease of maintenance, and quality of life for residents.
- b. Develop standardized specs and implement in new projects.

5-Year Measures of Success

Outputs

- Criteria and process are used regularly and efficiently to make decisions about potential opportunities.
- Meet with 5 or more towns annually
- Use the construction and design standards (measure maintenance efficiencies)

Outcomes

- Add at least 300 units of affordable housing in the region
- Bring the total portfolio to ~ 840 units of affordable housing
- Preserve X number of affordable housing units at risk (No loss of major affordable housing)
- Recapitalize 115 units of existing portfolio
- Add a total of 15-25 homeownership units.

Property Management

We are the premiere affordable housing operations manager in the Upper Valley, highly regarded by all stakeholders, including residents, applicants, funders, lenders, regulators, neighbors, and community members.

High-Level Goals and Strategies

1. Operational Excellence:

Manage the portfolio and the property operations division in alignment with KPIs, supported by detailed property budgets, and minimize financial support from TPHT.

- a. Informed by property deal summaries and proforma property budgets
- b. Outlined in annual property management budgets/plans for each property

2. Modernize Operations:

Implement consistent, efficient policies and procedures to enhance property management practices.

- a. Expand staff technical and decision-making skills
- b. Maximize use of property operations software
- c. Update policies, procedures, and workflows

3. Employer of choice in the Upper Valley:

- a. Increase staff retention and fill positions with qualified applicants promptly

2024– 2025 Action Steps

1. Leverage Technology:

Streamline property operations by maximizing existing technology.

- Engage a consultant by Spring/Summer 2025
- Implement Yardi's Rent Café for online rent payments and other functions
- Provide staff training

2. Workflow Analysis:

Conduct a property operations workflow analysis as foundation for property operations plan by early spring 2025.

3. Create a 3-Year Plan:

Develop a 3-year plan for property operations for property management, asset management, and resident services by late Spring 2025 to support portfolio growth and operating excellence.

- Engage a facilitator/consultant
- Identify TPHT planning group

4. Resource Acquisition:

Secure necessary resources by December 2024 to execute 2024 – 2025 action steps.

5-Year Measures of Success

Outputs

- A well-utilized and updated day-to-day property operations plan
- Implementation of at least one new property management software program / module

Outcomes

- Property operations staff aligned to maximize success across portfolio, property, and resident outcomes
- Proactive, timely, compliant, and effective property operations
- Seamless integration of development pipeline projects into property operations

Resident Services and Engagement

Twin Pines' long-range vision is to preserve tenancies and enhance the quality of life for our residents through responsive service delivery, relationship building, and community engagement. Over the next five years, we will deepen our capacity to deliver proactive approaches to resident services and engagement, and actively listen to and respond to the voices of our residents.

High-Level Goals and Strategies

1. Ensure the highest number of TPHT's residents retain their tenancies at our properties.

- a. Provide high quality, proactive supportive services through increased on-site presence, relationship building, and accessible resources.
- b. Increase deliberate communication and interactions between resident service, leasing staff, and property managers to anticipate and address issues proactively.
- c. Improve the system of care navigation for residents through seamless referrals to partners and other resources. Support "warm hand-offs", follow through, and contracts with providers to offer services on-site when needed.

2. **Enhance the quality of life and growth for residents based on self-identified goals.**
 - a. Assist residents to identify priority areas for their growth and support access to resources to meet those goals. Areas might include: Financial literacy, Employment opportunities, Education, economic mobility programming such as FTHB, or others.
 - b. Provide guidance for referrals, partnerships, and/or program development. Follow up to support the “warm handoff” to partners and identification of additional services.

3. **Build community among residents through social, recreational, and educational activities.**
 - a. Explore what kind of activities and events residents would like to see occur including gardening, child-centered programming, holiday events, shared food, or others.
 - b. Provide or work with partners to offer activities and services.
 - c. Continue to offer a variety of types of activities and assess outcomes to adjust programming in the future.

4. **Engage residents to share their experiences and ideas to improve the quality of life on their properties and within TPHT.**
 - a. Create meaningful avenues to hear the resident’s voice and encourage their participation at different levels (onsite, cross site, at the governance level).
 - b. Consistently engage in outreach through community meetings and one-on-one interactions.
 - c. Align different interests among residents with meaningful roles on the properties and within TPHT including serving on the Board of Directors.

5. **Ensure the staffing structure matches the ongoing growth of programming and portfolio.**
 - a. Analyze the optimal staffing to household case load, taking into consideration additional services, programming, and goals for resident engagement.
 - b. Annually assess the staffing needs and align with resource development goals.

2024 - 2025 Priority Action Steps

1. **Rebuild the supportive services staff team.**
 - Hire additional resident services coordinators.
 - Train all staff in fair housing and specific aspects of TPHT.
 - Build a team and implement effective cross-organizational collaboration and communication.

2. **Determine how to best utilize the VT specific resident supportive services staffing resources.**
 - Finalize planning by December 2024

3. **Develop, document, and deploy a proactive and responsive approach to service delivery and relationship building.**
 - Increase 1-1 interactions between staff and residents, increase on-site presence of staff on the properties.
 - Ensure residents are aware of all resources available to them from TPHT and our partners.
 - Create opportunities for regular feedback loops.
 - Structure proactive communication with property management.
 - Document the new model and train all staff.

4. **Train the board in resident service delivery plan and outcomes.**
 - Increase knowledge among the board about the goals, plan, rules, and outcomes.
 - Increase board knowledge of federal and state regulations that affect resident experience and TPHT staff responsibilities.
 - Identify what the board needs to know and how to report outcomes.
 - Train the board in fair housing or other rules/ regulations (federal, NH/ VT rules, and organizational plans/goals).

5. **Standardize systems for tracking and reporting services and resident outcomes.**
 - Assess existing technology and identify gaps needed to improve for more effective tracking.
 - Ensure system changes align with what we are required to report to the state funders.
 - Identify the resources needed to improve system tracking and develop a plan for implementation.
 - Use the system to build a baseline of services and outcomes, and to set targets for services for FY26.

6. **Explore ways to increase resident engagement and leadership.**
 - Introduce the strategic plan in an accessible format and invite resident feedback as to how they want to be involved.
 - Change the 'survey boxes' to 'suggestion boxes' at the properties to invite feedback.
 - Assess, discuss, and determine goals, strategies, resources required, and potential outcomes from a more intensive and staffed effort towards resident engagement and leadership.
 - Design a practical and meaningful system for resident engagement and voice at property and TPHT.

5-Year Measures of Success

Outputs

- Systems and structures in place for case management tracking
- # of residents receiving XYZ supportive services from TPHT
- # of residents receiving services provided by partners
- # of community events, activities, etc./ # of people participating
- # of leadership training events/ # participants
- Types of resident feedback loops, structures in place to share their voice
- Increase in response rate to resident satisfaction surveys (as measured against prior year response rate)

Outcomes

- # of residents who retained tenancy/ reduction in evictions/ reduction in turnover
- Outcomes from other services (e.g., financial literacy training)
- # of resident led initiatives
- # of residents sharing their voice, serving in leadership roles, etc.
- Trends in increased positive impressions of the quality of life for residents at their properties (based on resident satisfaction surveys)
- Impact of Resident + TPHT co-created solutions

Section IV: Organizational Resources and Structures

Twin Pines recognizes that it needs to invest in growing its organizational capacities and resources in order to meet its ambitious agenda for the community. Priority areas highlighted in the strategic plan are:

1. Staff development and organizational collaboration
2. Resource development and communication
3. Governance and board development

Staff Development and Organizational Collaboration

Twin Pines has the staff bandwidth and capacities to deliver on our mission and strategic plan goals. Cross organizational communication and collaboration fosters a healthy team environment where staff work towards common goals.

High-Level Goals and Strategies

- 1. Ensure that staff capacity (number of people and skills) matches the expected real estate production, property operations outcomes (maintenance, management, services), and organizational infrastructure needs.**
 - a. Align job descriptions and staffing structure to the strategic plan goals.
- 2. Increase a shared understanding of the organization's common goals, models, and approaches to ensure that the entire team is moving in the same direction.**
 - a. Increase knowledge and awareness of each department's work and how it aligns with the overall organization's goals and the strategic plan.
 - b. Reinforce clarity of roles and delegation.
- 3. Boost the capacity of the staff through an investment in staff training, professional development and team building.**
 - a. Target professional development to staff growth goals associated with the department's strategic plan and TPHT common goals.
 - b. Reinforce respectful listening and communication strategies.
 - c. Strengthen cross-organizational communication (across departments, 2-way management-staff) and trust building.
 - d. Increase supervisory capacity.

2024 - 2025 Priority Action Steps

- 1. Analyze current staff workplans and projections of future work associated with implementing the strategic plan.**
 - a. Determine areas to delegate internally or to a third party.
 - b. Determine system upgrades or improvements that would support greater efficiency.
 - c. Identify prioritized hiring targets to expand capacity.
 - d. Redesign staff structure, job descriptions, and workplans.
 - e. Align with resource development strategy.

2. Investigate new strategies for recruiting, hiring and training staff.

- a. Consider a part time position or outsourced.
- b. Update employee handbook.

3. Clarify decision making processes.

- a. Educate the staff in how decisions are made and their roles.

5-Year Measures of Success

Outputs

- Reduce staff workplan load from 110% to 80% capacity
- \$s invested in professional development and training

Outcomes – impact

- Staff retention
- Staff morale and team environment
- Staff report increased capacity and skills needed to carry out their jobs

Resource Development

Twin Pines’ long-term vision is to significantly increase contributions from private philanthropy, individuals, and collaborative funding in association with businesses, institutions, and nonprofits. We are committed to utilizing a formal resource development plan and disciplined process for donor solicitation, cultivation, and stewardship.

High-Level Goals and Strategies

1. Implement a robust resource development plan to increase sustainable donations from a greater number of individuals, foundations, and corporations.

- a. Research, recruit, cultivate, and steward a larger donor base from philanthropic sources – private foundations, corporations, national, and regional, and from new and existing individuals.
- b. Establish deeper relationships with all donors to ensure that they feel more connected to the organization.
- c. Analyze financial needs to implement the strategic plan and ensure that the fundraising goals match our ongoing needs for programs, projects, and organizational capacities.
- d. Create a formal development plan annually accompanied by a disciplined process for donor solicitation, cultivation, and stewardship.

2. Increase engagement among board members to recruit, cultivate, and steward major donors.

- a. Train and support appropriate board member who are able to assist in fundraising to build relationships with a portfolio of donors to keep them informed, engaged, sustained, and motivated to increase their donations.
- b. Form a Board Development Committee (board and non-board members) to opens doors for the organization: give and get funding including being involved in helping to make the ask. Create a regular cadence and consistent schedule for committee meetings with clear reports back to the board. Consider forming an Advisory Board to support resource development.

- c. Assign board members specific roles to support fund development including follow up to donors, resident testimonials, thank you notes, etc.
3. **Establish stronger relationships between the community and donors by engaging residents in telling their stories and bringing donors to events.**
 - a. Leverage events including the 35th anniversary to raise visibility about TPHT and recruit donors.
 - b. Solicit testimonials from residents, board members, staff and others.
 - c. Increase our social media and web presence.
 4. **Align marketing and communication materials and collateral that supports resource development strategies and plans.**
 - a. Target the impact reports to the interest of donors.
 5. **Evaluate potential of conducting a capital campaign.**
 - a. Consider hiring a consultant to help with a feasibility study to determine our potential.

2024 - 2025 Priority Action Steps

1. **Research and analyze the donor base for the past 3 years.**
 - Total history and track record: total individual, philanthropic, and corporate dollars and sources.
 - Number of donations per donor, segmented by amount, frequency, and purpose (specific, general)
 - Conduct outreach to individual donors to find out what motivates them to give.
 - Projections of which ones could be encouraged to give more times and larger donations.
 - Analysis of trends and projections for baseline assumptions for the strategic plan.
 - Develop a pyramid based on last year's giving
 - Identify additional donor research
2. **Assess the resources needed to implement the strategic plan and become fully staffed to set a target for fundraising.**
 - Analyze current staffing gaps and potential needs for unrestricted funding to meet the strategic plan goals.
 - Specify the target use of fundraising: resident services, real estate prospecting, administrative costs, training, etc.
3. **Develop a plan for FY25-FY26 and a process for donor outreach including tracking, managing contacts, and relationship building.**
 - Design a formal structure and disciplined process.
 - Define outreach model for connecting to the donors.
 - Identify specific roles of board, staff, and the ED.
 - Set targets for increasing amounts and increasing number of donors.
 - Develop a pyramid for individual donor outreach and cultivation.
 - Create a privacy policy and procedures.

4. **Provide training to the Development Committee, the staff and the Board about where funding comes from now and how it's used.**
5. **Develop a plan for capitalizing on the fundraising opportunities associated with the 35th anniversary.**
 - Staff and Board will create specific fundraising opportunities with major donors focused on the 35th anniversary.
6. **Identify staffing structure needed to support resource development goals and upgrades to database systems to improve accuracy, reporting, and analysis.**
 - Donor research software such as DonorSearch.

5-Year Measures of Success

Outputs

- Structures and staffing in place including database reporting, analysis, tracking capacity
- # of board members engaged
- # of events, etc.

Outcomes

- Raise X over 5 years
- Grow the # of individuals from X to Y
- Grow the \$s raised from individuals from X to Y
- Raise multi-year funding from X foundations, X corporations = X\$s

Governance and Board Development

Twin Pines recognizes the importance of effective governance practices and intends to invest in our own development process. Our priority is to deepen board capacity especially in the field of resource development.

High-Level Goals and Strategies

1. **Ensure the Board of Directors consistently has a variety and depth of skills, expertise, and backgrounds that are needed for effective governance.**
 - a. In the next 2-3 years, our goal is to increase the number of board members who can share finance expertise, fundraising, and real estate, while sustaining expertise in nonprofit finance, constituent needs, and stewardship.
 - b. Emphasis is on deep fundraising capacity for recruitment strategy.
 - c. We will consider all classes of diversity in the board member recruitment.
2. **Recruit, cultivate, train, and engage residents to serve effectively on the Board.**
 - a. Identify meaningful roles for residents and provide them with the support they need to be full participants in committees and board meetings.
 - b. Work with the resident services staff to identify and cultivate residents on annual basis to develop a pipeline of potential new leaders who would enjoy this level of service and provide a helpful perspective to the organization.

- c. Invest in listening to residents across the portfolio and bring this information to the top levels of the organization.
- 3. Develop annual goals for board development based on a board self-assessment of the strengths and areas of growth.**
 - a. Make sure the board feels supported and can identify avenues for training on a regular basis.
 - b. Conduct a self-assessment every 2 years.
- 4. Increase board to board relationships and opportunities for reflection.**
 - a. Review progress on strategic plan at every board meeting and annually.
 - b. Schedule an annual board retreat to include opportunities to share food and build relationships.

2024 - 2025 Priority Action Steps

1. Conduct a board self-assessment and develop a plan for recruitment with particular focus on fundraising capacity, and set annual board development goals as a result.
2. Work with resident services staff to identify additional mechanisms for engaging residents in the leadership of the organization.

5-Year Measures of Success

- Complete board assessment in 1 year and every other year afterwards
- Develop recruitment strategy based on the gaps
- Develop board development goals annually

Section V: Implementation and Evaluation

Twin Pines will create a workplan in September on an annual basis to reflect the priority action items and anticipated outcomes for the fiscal year that begins in October. Staff workplans will align accordingly.

To evaluate the success and lessons learned from implementing this plan, staff will use the workplan to track the most important measures of success in each area.

Dashboards will be created on a monthly basis and be included in the Executive Director's report to the Board of Directors. Stop sign signals (green, yellow, and red) will be utilized to indicate the level of progress and areas that need further attention.

Board and staff will have an opportunity quarterly to reflect on the progress and discuss areas that might need adjusting based on the plan's implementation.

Evaluation questions can help guide this process. Overall we will want to take stock of what we are learning about ourselves and our environment from implementing this plan. Some specific questions may include:

1. Did increasing investment in resident services, quality of life programming, and community engagement lead to more residents who participate and share their voice with Twin Pines in meaningful ways?
2. Did these efforts increase resident's perception of their quality of life and conditions on the properties?
3. What was the impact on organizational efficiencies and effectiveness of developing and implementing a comprehensive property operations business plan?
4. How have the investments in staff development, training, and collaboration improved the work environment and our ability to hire and retain staff?
5. Were we able to grow our revenue base through new strategies and did this investment enable us to match staff capacity with our ambitious growth agenda?