





Strategic Plan 2022 - 2025



Angelus Plaza - Los Angeles, California

About RHF

RHF has more than 60 years of experience in the affordable housing industry and we are dedicated to partnering with individuals, organizations and municipalities that share the same passion we have for providing affordable housing throughout this great country.

At the beginning, RHF's mission was to provide dignified, affordable housing and services for the elderly. Today, RHF is one of the nation's largest non-profit sponsors and managers of housing and services for older adults, persons with disabilities, and low income families.

Based in Long Beach, California our communities are as diverse in size and scope as the staff that operates them. Our portfolio includes the largest affordable senior housing community in the country (Angelus Plaza in Los Angeles, CA) to a 12 resident community for the developmentally disabled (Redding RHF Housing in Redding, CA). RHF means home to more than 22,000 people in 198 housing communities in 29 states, the District of Columbia, Puerto Rico and the U.S. Virgin Islands.

Our staff brings decades of experience to every project we commit to and our commitment lasts much longer than just the time it takes to build a building. We plan for our communities to serve generations to come.

Our Strategic Planning Process

In early 2021, the process of reviewing RHF's past accomplishments and determining the direction of the organization for the next three years began.

The Alford Group was selected to partner with executive staff and national board conducting a comprehensive strategic planning process that assessed the organization's successes and challenges and developed a roadmap to outline a plan for RHF's future. This process included ongoing meetings with various board members and staff and was performed with Diversity, Equity & Inclusion considerations at the forefront. After a strategy design workshop in August to articulate the overarching vision, multiple workgroups developed detailed goals and tactics.

Focus groups were held, virtually, with regional staff and a cross-section of managers, and an online survey was sent to a cross-section of staff as well as RHF's national board. External interviews with vendors, donors, industry peers and business partners were also conducted. Results from these comprehensive efforts were compiled and final recommendations were presented in early November.

RHF's National Board of Directors voted to adopt RHF's 2022 – 2025 strategic plan on November 10, 2021. The first year of the plan is heavily focused on the first pillar, Asset Optimization. RHF's executive staff and Board will evaluate progress in 2023 to refine the plan as needed for 2024 and beyond.

As next steps to the implementation of this updated strategic plan, RHF launched its Diversity, Equity & Inclusion initiative in February 2022. Working again with The Alford Group, we hope to have results from these comprehensive efforts compiled and final recommendations presented to RHF's National Board of Directors in November 2022.



Our Mission

To provide affordable
housing and service
coordination for persons with
limited incomes in an inclusive
environment that enhances their
quality of life physically, mentally,
and spiritually.









Our Vision

A society in which all people have quality, affordable housing.



Our Values

Service

We are dedicated to serving our residents and their local communities.

Faith

We are faith-based, mission-driven, and proud of our heritage with the United Church of Christ. We honor the faith and traditions of every religion and the nonreligious and will not attempt to impose our faith on others.

Respect

We believe each person is a child of God and, as such, should be treated with dignity and respect.

Integrity

We are committed to being honest, ethical, and accountable, and we hold our partners to the same high standards.

Diversity, Equity and Inclusion

We embrace diversity, pursue equity, and foster an inclusive environment.

Lifelong Learning

We are committed to a culture of professional growth through education, training, and continual learning.

Advocacy

We advocate for public policies that benefit persons in need of affordable housing.

Strategic Plan Framework: 2022 - 2025

Pillars - Where will we focus?

ASSET OPTIMIZATION AND GROWTH

OPERATIONAL EXCELLENCE

PHILANTHROPY AND COMMUNICATIONS RESIDENT AND STAFF EXPERIENCE

Goals - What do we want to achieve?

Balance portfolio to optimize asset management; expand partnerships and strategically grow assets through new affordable housing development and acquisitions Activate RHF's vision and strategy through enhanced staff recruitment, training and retention; governance; internal systems and technologies; and DEI commitment across the organization

Increase visibility and philanthropic support

Continue to leverage and grow resident and staff loyalty and satisfaction

Strategies - How will we achieve our goals?

Rebalance portfolio to maximize sustainability and mission alignment

Pursue strategic asset growth in affordable housing

Strategically expand housing options for homeless and near-homeless seniors and veterans and work synergistically with partners

Attract, train and retain talented staff

Strengthen board recruitment and succession

Develop senior leadership succession plan

Align systems and structures with the overall strategy

Use technology to modernize operations, increase productivity, decrease costs and improve the resident and employee experience

Align organizational plans with RHF's DEI commitment

Develop organizationwide brand strategy and refine core messaging to better tell our story and convey our value

Establish a culture of philanthropy and encourage donors to engage with residents and communities

Diversify sources of philanthropic funding

Create a plan for organization-wide information sharing

Explore how to centralize advocacy and thought leadership

Strengthen and grow RHF's organizational culture of caring, belonging and community

Identify and implement an online resident and staff satisfaction survey within two years, or determine feasibility of doing so

Develop a comprehensive approach connecting resident experience to property management expectations and benchmarks for success, advancement, competitive compensation, etc.

Asset Optimization and Growth

GOAL

Balance portfolio to optimize asset management; expand partnerships and strategically grow assets through new affordable housing development and acquisitions

MEASURABLE OUTCOMES

STRATEGIES AND ACTION STEPS Growth rate of 300-400 units a year; all RHF properties self-sustaining; target asset mix achieved; geographic concentration achieved

1. Rebalance portfolio to maximize sustainability and mission alignment

- → Optimize quality of life, resident care and experience through portfolio balancing within 9-12 months
- → Months 13+, annually analyze portfolio to ensure positive, sustainable performance on track with established targets and goals

2. Pursue strategic asset growth in affordable housing

- → Determine core markets for growth
- → Develop new affordable housing
- → Rehab and optimize current facilities (considering sustainability), preferably utilizing low-income housing tax credits and other affordable housing programs
- → Develop a new acquisition risk matrix that takes into account perils and other pertinent risk factors

3. Strategically expand housing options for homeless and near-homeless seniors and veterans and work synergistically with partners

- → Provide for homeless housing
- → Develop business plan including financials, screening protocols, staffing, partners to provide wrap-around services, etc.

- Increased census without increased expenses
- · Communities are financially self-sustaining
- · Preferred geographic markets identified
- Optimal portfolio mix determined and documented
- Portfolio assessed and measured against goals annually
- Decreased number of insurance claims

Operational Excellence

GOAL

Activate RHF's vision and strategy through enhanced staff recruitment, training and retention; governance; internal systems and technologies; and DEI commitment across the organization

MEASURABLE OUTCOMES

Increased staff retention; increased efficiencies; accessible WiFi in all RHF communities, with evidence of utilization by residents and staff; increased automation; reduction in manual processes; DEI strategies operationalized

STRATEGIES AND ACTION STEPS

1. Attract, train and retain talented staff

→ Develop and promote opportunities for staff training, career pathing and professional growth Enhance staff recognition and improve organization-wide benefit offerings

2. Strengthen board recruitment and succession

- → Create process for identifying and recruiting board candidates based on desired characteristics and skillsets
- → Develop board succession plan

3. Develop senior leadership succession plan

→ Focus on development of individuals to achieve the goals of the new strategic plan

4. Align systems and structures with the overall strategy

- → Evaluate and revamp internal systems and processes, including performance evaluation and accountability structures
- → Assess current staffing structure and improve where necessary
- → Develop a strategy to assess, mitigate and monitor operational risk
- → Expand service coordination program to all communities that have a demonstrated need and available funding

5. Use technology to modernize operations, increase productivity, decrease costs and improve the resident and employee experience

→ Update technology strategy and optimize existing software modules to support the new strategic plan and DEI

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STRATEGIES AND ACTION STEPS

5. Use technology to modernize operations, increase productivity, decrease costs and improve the resident and employee experience

- → Provide WiFi access for employees and residents in all RHF communities and fully leverage to support stronger internal communications, training and engagement
- → Implement more robust financial and organizational dashboards that allow for real-time reporting
- → Evaluate current software; identify opportunities to increase automation and reduce reliance on manual processes

6. Align organizational plans with RHF's DEI commitment

→ Integrate DEI objectives into the strategic plan by December 2022

- % of employees who participate in professional development programs
- Increased staff satisfaction as measured by staff retention and annual survey results
- Board roles, responsibilities and recruitment strategy defined
- Pipeline of ready and experienced board leaders in place
- Department core policies and procedures established and formalized for each department
- Carrying out policies and procedures tied to performance
- Centralized HR data management system implemented
- Risk response dashboard created and implemented
- Increased staff proficiency and utilization of available technology
- 5-10% annual increase in WiFi access for remaining # of RHF communities without WiFi
- Smart TV in every RHF community with broadband connectivity
- Increased utilization of reporting software resulting in decrease in manual reporting
- DEI plan reflected both at corporate and in the field

Philanthropy and Communications

GOAL

Increase visibility and philanthropic support

MEASURABLE OUTCOMES

STRATEGIES AND ACTION STEPS Increased funds raised; internal communications system established; external communication goals and success measures defined; improved social accountability

Develop organization-wide brand strategy and refine core messaging to better tell our story and convey value

- → Define external communications goals and strategy, elevating success stories and impact online and in print
- → Record ongoing "mission moment" videos of residents, leadership and staff to use for multiple purposes (donor cultivation and stewardship, resident recruitment, staff onboarding, etc.)
- → Develop a social media strategy to increase visibility, brand recognition/ following and engage new audiences and specific communities via relevant platforms
- → Create branding and style guidelines
- → Create a thought leadership platform

2. Establish a culture of philanthropy and encourage donors to engage with residents and communities

- → Establish plan to promote the RHF philanthropic value proposition
- → Enlist board and staff as ambassadors to engage staff and residents in supporting and championing RHF's mission
- → Increase philanthropy and communications staffing to achieve growth (consider developing internship program)

3. Diversify sources of philanthropic funding

- → Increase funding from individuals, churches, and foundations
- → Strengthen and broaden annual giving programs
- → Include resident experience in funding initiatives (e.g., lifelong learning, support services, architecture/facility quality)
- → Develop targeted case statements for segmented audiences and various needs

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GOAL

Increase visibility and philanthropic support

MEASURABLE OUTCOMES

Increased funds raised; internal communications system established; external communication goals and success measures defined; improved social accountability

STRATEGIES AND ACTION STEPS

4. Create a plan for organization-wide information sharing

- → Develop a crisis communication strategy
- → Establish plan for collecting existing staff emails and new staff emails at the time of onboarding
- → Create plan for disseminating the strategic plan across RHF
- → Evaluate additional platforms for staff information sharing

- Top three messaging goals and metrics identified
- System and plans in place to launch external e-newsletter
- Expanded/varied audiences reached and increase in followers
- Improved reviews and increased review volume
- Style guide complete; all RHF materials approved by communications department
- Increased funding from individuals, churches, and foundations
- Audiences segmented and properly coded in donor database
- Case statements per audience created
- Crisis communications plan developed
- Increased number of staff emails obtained

Resident and Staff Experience

GOAL

Continue to leverage and grow resident and staff loyalty and satisfaction

MEASURABLE OUTCOMES

Improved satisfaction rating; decreased resident complaints; increased resident survey response rate from 60% to 70%; established benchmark for staff satisfaction

STRATEGIES AND ACTION STEPS

1. Strengthen and grow RHF's organizational culture of caring, belonging and community

- → Create and implement an organization-wide culture-building plan
- → Clearly define, communicate and celebrate RHF's mission-focused culture and promote it as a benefit of employment
- → Improve communication, coordination and alignment across departments
- → Establish employee appreciation/recognition program
- → Create an onboarding program (including invitation for facility tours, video from Stuart, RHF branded items, etc.) for new employees to immerse them in RHF's mission and culture and generate feelings of excitement and belonging

2. Identify and implement online resident and staff satisfaction surveys within two years, or determine pathway to do so

- → Develop process and accountability measures for analyzing survey results and addressing key findings and concerns requiring immediate interventions, and informing short-term and long-term goals and plans
- → Ensure all residents and staff have access to completing the surveys and enhance incentives for individuals who complete the surveys
- → Tie resident satisfaction to employee satisfaction
- → Consider how proper facility management and maintenance impact resident satisfaction

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GOAL

Continue to leverage and grow resident and staff loyalty and satisfaction

MEASURABLE OUTCOMES

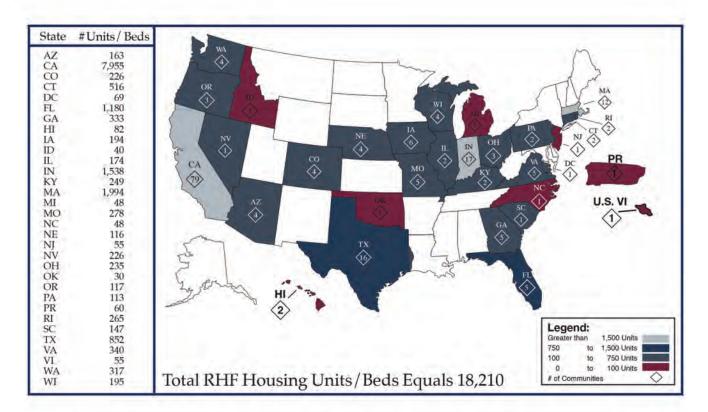
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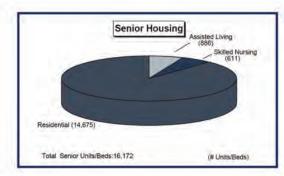
STRATEGIES AND ACTION STEPS

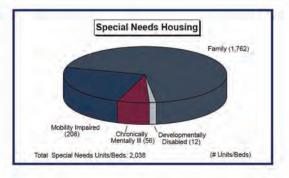
- 3. Develop a comprehensive approach connecting resident experience to property management expectations and benchmarks for success, advancement, competitive compensation, etc.
 - Cultivate an environment that promotes managers successfully managing the core business (filling vacancies and collecting rent) AND managing the human side/resident experience of property management (MOR scores, REAC scores, low-level of complaints and resident turmoil, going above and beyond, maintaining a stable environment)
 - → Clarify and communicate objectives and expectations for property managers (business and human side)

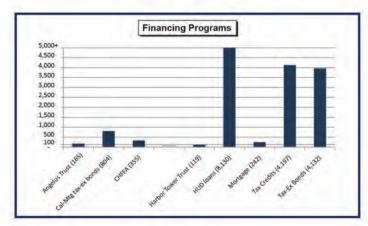
- 60-day new employment follow-up implemented
- Management/communication style shifts from reactive to proactive
- Appropriate departments/leaders invited to participate in decision-making/ discussion early on
- Elevated contributions to resident and staff experience
- Checklist/process for welcoming new employees implemented
- Management best practices established; training objectives created; training conducted
- Measurable improvement by participants in prioritized training module
- Corporate staff experiences the joy of resident satisfaction
- Increased staff retention
- RHF recognized as employer of choice

Our Portfolio of Communities









Our communities may use a mix of sources (HUD, tax-credits, bonds, etc.) for funding. For the purpose of this graph, we categorize them by primary funding source.

Retirement Housing Foundation National Office Information

Senior Staff:

Stuart Hartman, President & CEO Robert Amberg, Executive VP & General Counsel Frank Rossello, CFO & VP of Finance Brian Magnone, CIO & VP of Treasury Stephanie Titus, CSO & VP of Philanthropy

National Headquarters:

911 N. Studebaker Road Long Beach, California 90815-4900

Tel: 562-257-5100

Website: www.rhf.org

Regional Management Offices

East Coast

950-23 Blanding Blvd. #140 Orange Park, Fl 32065 Tel: 562-619-5628

East Coast Healthcare

1100 S. Courtenay Parkway Merritt Island, FL 32952 Tel: 407-346-6231

Federal Management (A Schochet Company)

536 Granite Street #301 Braintree, MA 02184 Tel: 617-482-8925

Midwest

P.O. Box 1064 Anderson, Indiana 46015 Tel: 562-257-5182

Great Lakes

5634 Coventry Lane #234 Fort Wayne, IN Tel: 562-756-6927

Northwest

911 Studebaker Road Long Beach, California 90815 Tel: 562-257-5100

North Central

3 Wenwood Circle Council Bluffs, IA 51503 Tel: 562-708-9558

Southwest

P.O. Box 411 Austin, Texas 78748 Tel: 512-858-4803

Southern California I, II & III

911 N. Studebaker Road Long Beach, California 90815-4900 Tel: 562-257-5100

West Coast Healthcare

911 N. Studebaker Road Long Beach, California 90815-4900 Tel: 562-257-5100