STRATEGIC PLAN 2020-2025

CASA’s mission is to provide access to stable, affordable housing for people who are homeless or at risk by developing and managing rental communities.

The need for housing in our community is on the rise. 43.5% of Wake County renters, 46% of Durham and Orange County renters are cost-burdened in their housing, meaning they pay more than 30% of their income on rent. Between 10% and 17% of Triangle residents are living below the poverty line (14.5% in Orange, 17.4% in Durham, and 10.8% in Wake County).* As more and more people move to the Triangle, the need for affordable housing in areas with access to transportation, health care, and other amenities will continue to grow in the coming years.

FIVE CHALLENGES IN THE YEARS AHEAD

In 2019, CASA completed an Organizational Assessment to begin our 2020-2025 strategic plan. The Assessment identified five top challenges, all of which are related to the organization’s capacity for growth:

• availability of affordable land/property
• cultural and procedural shifts that come with a growing staff
• need for infrastructure enhancements to facilitate communication and productivity
• need to define what services are included within CASA’s mission
• access to necessary funding to support the above efforts

CASA’s strategic plan is our roadmap for putting our mission to work. As we developed the plan, we spoke with tenants, donors, and other stakeholders, who all told us the same thing: serve more people.

STRATEGIC PLAN: FOUR AREAS OF FOCUS

1. Operations & Tenant Success
2. Financial Management
3. Resource Development
4. Real Estate Development

STRATEGIC PLAN: FIVE YEAR GOALS

• Implementation of cost-saving, efficient technology
• Commitment to creating safe and welcoming office space
• Excellent internal and external communications
• Enable and foster a culture of continuous improvement to add value to tenants and staff
• Maintain financial health, determine optimal investment strategies
• Grow CASA’s fundraising program to raise $1.2 million annually
• Develop and implement an asset management plan
• Pursue diverse real estate development and funding opportunities to allow for ongoing growth to serve more people
• Define and implement CASA’s role in community advocacy
• Add 500 additional affordable housing units

*2012-2016 statistics from the NC Department of Health and Human Services’ State Center for Health Statistics
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<tr>
<th>Area of Focus</th>
<th>Five Year Goals</th>
<th>Strategies &amp; Metrics</th>
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| Operations and Tenant Success| To be a high performance organization committee to tenants, core values, and strategic vision with a highly engaged staff and Board of Directors  
- Implement cutting edge, streamlined, and efficient technology  
- Ensure working spaces are welcoming and safe spaces  
- Communicate timely, accurately, and consistently  
- Foster a culture of continuous improvement | - Evaluate HR capacity against current and future needs  
- Create comprehensive succession plans  
- Update Board succession plan  
- Create & implement a technology plan  
- Evaluate office space needs, explore options for 624 campus  
- Develop communications plans  
- Assess processes and apply Lean process across the agency |
| Financial Management         | To be a financially healthy agency with a clear investment strategy              | - Establish a Board Finance Committee  
- Evaluate funding sources and costs  
- Evaluate fiscal model and theories of financial sustainability  
- Develop investment plan and policies |
| Resource Development         | To diversify and grow our fundraising program                                      | - Execute comprehensive annual Resource Development Plan strategies, ie. grant writing, special events, online giving, direct mail, etc.  
- Develop major donor initiatives to meet the need for increased restricted funds  
- Grow the impact of CASA’s communications for stewardship and engagement  
- Focus on donor retention  
- Leverage 30th anniversary to raise funds |
| Housing Development and Asset Management | To expand a well-managed portfolio of affordable rental properties | - Develop and implement an asset management plan for every property  
- Evaluate types of development to determine optimal mix for CASA  
- Define CASA’s role in advocacy  
- Evaluate bringing outsourced work in-house  
- Define growth plans |