



10400 Detrick Avenue  
Kensington, Maryland 20895  
240-627-9730

**Board of Directors Meeting (Virtual)**

**EXPANDED AGENDA**

**June 10, 2024**

**5:00 p.m.**

**YouTube link: <https://youtube.com/live/Zdq1fsDNlxA?feature=share>**

				Res. #
5:00 p.m.	<b>I. <u>ADMINISTRATIVE</u></b> Opening remarks from Chelsea Andrews			
5:05 p.m. 5:15 p.m. 5:45 p.m. 6:35 p.m.	<b>II. <u>DELIBERATION/REFLECTION</u></b> Overview of RSD portion of strategic plan Overview of preliminary ideas for implementation plan Discussion of HOCP priorities Report of HOCP financials and drafting of FY25 budget			
7:00 p.m.	<b><u>ADJOURN</u></b>			

NOTES:

1. This Agenda is subject to change without notice.
2. *Times are approximate and may vary depending on length of discussion.*
3. \*These items are listed "For Future Action" to give advance notice of coming Agenda topics and not for action at this meeting.

If you require any aids or services to fully observe this meeting, please call (240) 627-9730 or email [communitypartners@hocmc.org](mailto:communitypartners@hocmc.org).



# HOC & HOCP STRATEGIC PLANNING

**Chelsea Andrews**, President

**Ken Silverman**, Vice President, Government Affairs

**DaVida Rowley-Blackman**, Vice President, Resident Services

**John Vass**, Grants Coordinator, Legislative & Public Affairs



# HOC & HOCP Strategic Planning Overview

- Recap HOC's Strategic Planning Process
- Review Plan Highlights & Implementation
- Discuss Proposed Recommendations
- Review HOCP Strategic Planning Timeline

# HOC's Planning Process: Two-Phase Approach

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## Phase I: Strategic Plan

- Stakeholder Engagement
  - Surveys, Town Halls, Focus Groups & Interviews
- Internal and External Research (e.g., Ecosystem, Needs & Current State Analysis, Community Profile, Benchmarking & Best Practices, etc.)
- Vision, Mission & Core Values
- Strategic Priorities, Goals & Objectives

## Phase II: Implementation Plan

- Operationalize, measure & monitor goals and objectives of the Strategic Plan
- Internal process to develop feasible annualized workplan for Commission review
- Detailed action steps & metrics
- Dashboards and reporting to monitor progress



# Phase I: Stakeholder Engagement



## Stakeholder Interviews (50 people)

- Commissioners
- HOC leadership & staff
- County Executive & Council
- Partner agencies & organizations
- Nonprofit & business leaders

## Surveys

- Customers: Residents, Voucher holders, Waitlist
  - English & Spanish
  - 1,760 respondents
- General Public
  - 341 respondents
- Staff
  - 120 respondents

## Town Halls

- Virtual (July)
  - 140 participants
- In-Person
  - Over 130 participants

## Focus Groups

- African American families
- Hispanic families
- Immigrant families
- Individuals on Housing Path Waitlist
  - Seniors & Persons with disabilities

# Phase I: Internal and External Research

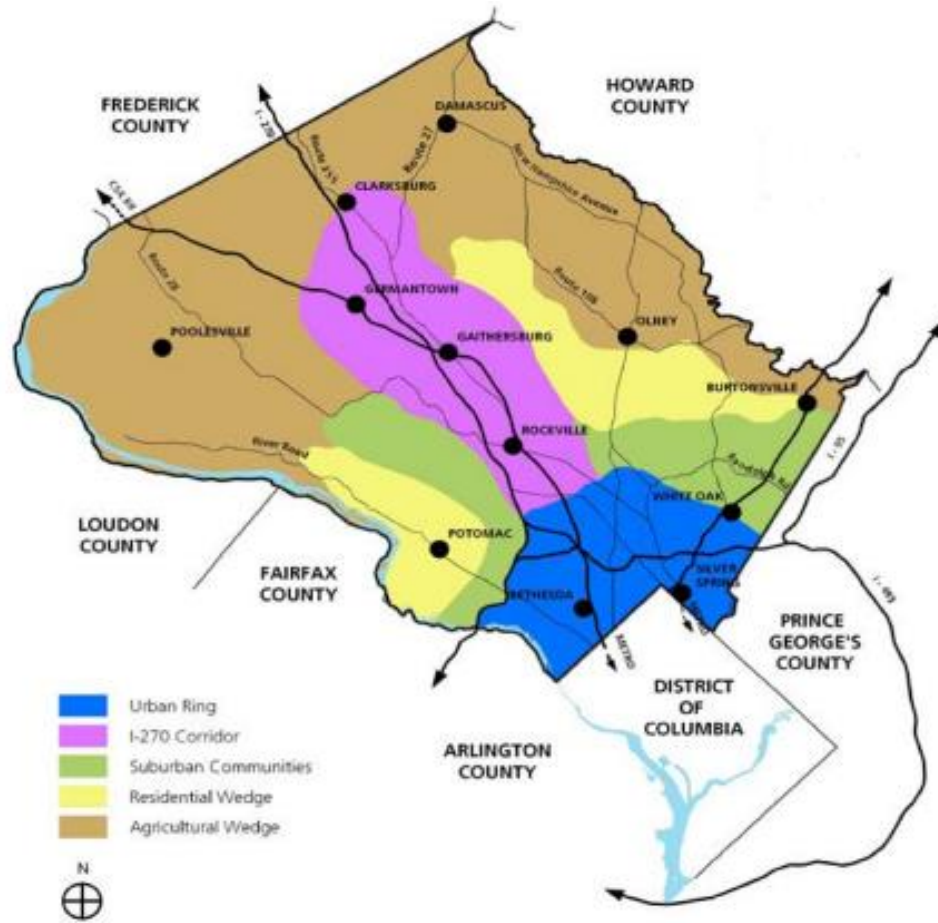
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- Analysis of internal HOC data, budget, financial reports, wait list
- Analysis of opportunities and challenges facing HOC
- Review of national best practices
- Review of Montgomery County housing, population and economic trends












# Montgomery County is one of the most diverse places in America



Map from Montgomery County's 1993 "Wedges & Corridors" General Plan Update

-  500 square miles and 1.1 million residents
-  Majority people of color and 41% speak a language other than English at home
-  Median income of \$125,583, but more MCPS students receive Free & Reduced Price Meals than there are total students in DCPS
-  Highly educated: 60% of adults have a bachelor's degree, 33% have a graduate degree
-  Home to densest place in America (Friendship Village on DC border), as well as 300 acre Agricultural Reserve
-  Median owner-occupied home value of \$588,000
-  Majority of existing homes are single family detached, but new development is infill townhomes, mid-rise, and high-rise

# HOC Families – What we know

Total of over 20,745 individuals serviced by HOC

*\*according to data available in Yardi*



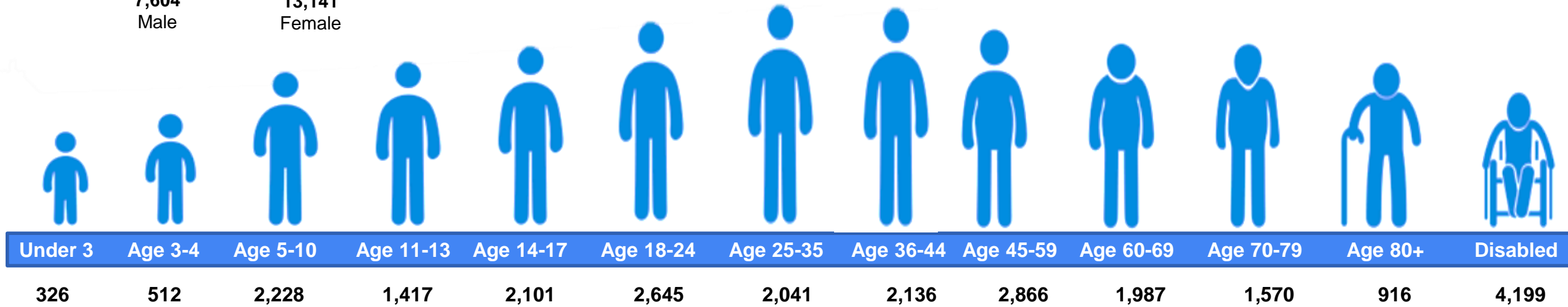
7,604  
Male



13,141  
Female

Race/Ethnicity	Montgomery County	HOC Residents
Black	18%	73%
White	41%	18%
Hispanic	21%	8%
Asian	15%	4%

\$22,032  
Average  
Household  
Income





# HOC relies on federal, state and local partners to accomplish its mission

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## Federal Government

Direct funding to HOC for rental assistance, resident services, mortgage programs

Federal programs are authorized by Congress and HOC is regulated by HUD

IRS allocates Low Income Housing Tax Credits (LIHTC) and Private Activity Bond (PAB) capacity to State

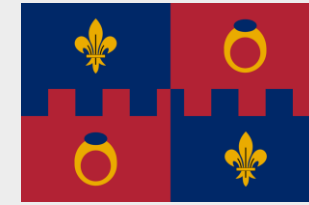
CDBG and HOME allocated to County



## State of Maryland

Direct funding to HOC through LIHTC, PABs, and occasional grants, usually through DHCD

HOC is authorized by and subject to state law, created by the General Assembly and Governor



## Montgomery County

Direct funding to HOC for resident services, rental assistance, and construction and preservation of affordable housing

HOC Commissioners are nominated by the County Executive and confirmed by the County Council

HOC is authorized by and regulated by County law, created by the County Council and Executive

HOC partners with DHCA, DHHS, and other County agencies

# Phase I: Vision, Mission & Core Values

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## VISION

It is our vision that everyone in Montgomery County has access to the safe, affordable, high-quality housing, and attendant services that they need to reach their fullest potential.

## MISSION

HOC exists to provide people with low and moderate incomes the opportunity to live in safe, affordable, high-quality housing in Montgomery County. We strengthen families by offering opportunities for personal and economic growth through partnerships and supportive services.

## CORE VALUES

1. People-First with Dignity & Respect | Our Staff
2. People-First with Dignity & Respect | Our Customers
3. Innovative and Entrepreneurial
4. Equity in Everything we Do
5. Power of Partnerships
6. Community-Enhanced Housing
7. Stewardship



# Phase I: Strategic Priorities (Our Goals)

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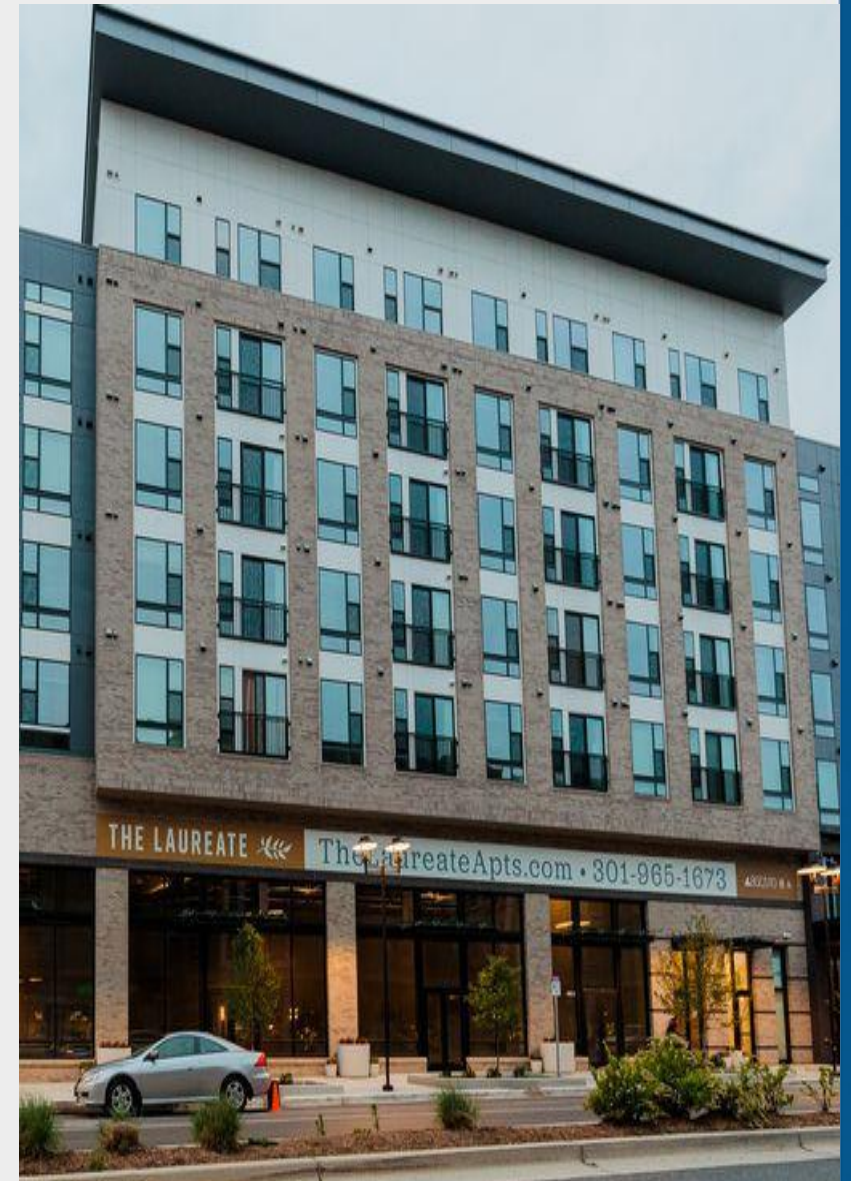


# GOAL I: EXPAND Affordable Housing in Montgomery County

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## Objectives

- A. Expand HOC's Portfolio of High-Quality Affordable Housing
- B. Expand Housing Supply in Montgomery County
- C. Expand and Optimize Rental Assistance





# EXPAND Housing Production: HOC will maximize and expand the path-breaking Housing Production Fund to develop thousands of new homes

\$54 million in taxpayer dollars enables **\$2 billion** in investment

\$30,000 in county funds per affordable home

**6,000 new homes** over 20 years

30% affordable = 1,800 permanently affordable homes

**Seven projects** by 2030

More projects could be added with additional resources

**The New York Times**  
 This Is Public Housing. Just Don't Call It That.  
 Montgomery County, Md., like many places, has an affordable housing crisis. So it started acting like a benevolent real estate investor.

**FAST COMPANY**  
 How this sleek affordable housing project in Maryland became a reality  
 This public-private partnership could be a model for affordable housing across the country.

**Vox** What if public housing were for everyone?  
 Local governments are trying a new way to address the housing crisis.

**Bloomberg** The Montgomery County Model for Affordable Homes  
 How Montgomery County, Maryland pioneered a new affordable housing model.



The Laureate, located at the Shady Grove metro, was the first HPF project to open to residents in June 2023. It is 98% leased.



# HOC currently plans to start 2,684 new homes by 2030

## HPF Pipeline

**FIGURE 3** The HPF Pipeline

			HPF Loan Issued	Under Construction	Building Opens		HPF Loan Repaid				
The Laureate	268 Units	\$14 million									
Hillandale Gateway	463 Units	\$35 million	Planning								
Laureate Phase 2	415 Units	\$40 million									
Wheaton Gateway	435 Units	\$25 million									
Avondale	375 Units										
Forest Glen	413 Units										
Elizabeth House IV	315 Units										
			2021	2022	2023	2024	2025	2026	2027	2028	2029

\*All numbers and timelines are projections based on best available information

## Additional Projects

### Garnkirk Farms

Planned 184-unit apartment building in Clarksburg financed by Low Income Housing Tax Credits

### Heritage Emory Grove

Partnership with Montgomery County, Emory Grove United Methodist Church, and Habitat for Humanity is intended to create a new community honoring Emory Grove, a historically black community that was broken apart by redevelopment. Mixed-income homeownership & rental, with new street grid, pedestrian connectivity, an updated community center, Johnson's Local Park, historical programming, & cultural amenities.

### Sandy Spring Missing Middle

Proposed addition to HOC's existing Sandy Spring Meadow property to add 22 units in duplexes, triplexes & carriage houses + central community space.





## GOAL II: ENHANCE the Lives We Touch Through Supportive Services & Partnerships

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### Objectives

- A. Enhance HOC's Resident Services Programs
- B. Enhance Partnerships with Government and Nonprofit Partners to Provide More Services
- C. Enhance Wealth-Creation and Homeownership Programs to Further Housing Equity
- D. Enhance Opportunities for Applicants on HOC's Wait List



## GOAL II: ENHANCE the Lives We Touch: Resident Services Sample Initiatives

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### Boosting awareness of available services

Creating a Resident Handbook of services to support residents in understanding more about our programs and services, as well as County-wide resources.

### Surveying our customers

Surveying our customers to better understand what is working well, what we need to improve upon and how best to enhance program and service delivery.

### Leveraging our Resident Advisory Board

Working with our newly appointed RAB to ensure resident voices are heard.





## GOAL III: EXCEL as a World-Class Organization

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### Objectives

- A. Excel as a World-Class Place to Work
- B. Excel by Providing World-Class Customer Service
- C. Excel through Modern Technology and Data Systems
- D. Excel with Transparent and Accountable Implementation of this Plan



# GOAL III: EXCEL as a World-Class Organization: Enhanced Customer Service

## Ensure Adequate Staffing Levels

Each division will review its staffing needs and work closely with Human Resources to ensure divisions are adequately staffed to elevate the customer service experience.

## Provide Additional Customer Service Training

Engage with external trainers and HOC's subject matter expert to develop and provide extensive Customer Service Trainings.

## Expand the Use of Trained Volunteers to Assist Customers

Explore and expand opportunities for engaging volunteers/navigators who will be trained to assist our customers with navigating HOC's services.

## Make HOC Easy to Reach

Ensure that HOC is easy to reach, both physically and digitally.



# HOC is now in Phase II: Implementation Plan



**QUESTIONS?**



# Proposed Recommendations for HOCP

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## *Overarching Goals*

1. Break intergenerational cycles of poverty by adapting a cradle to career model focused on economic mobility.
2. Expand and diversify programming to ensure equity across all age groups.
3. Track and evaluate outcomes to assess impact, scalability, and sustainability.



# Proposed Recommendations for HOCP

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## *Pilot new programs for children under 5*

### School Readiness

- Develop a new program to help parents navigate early childhood development, connect with other parents, and enroll children in pre-school.
- Develop a new program to help families build in-home libraries to foster a love of reading and learning.

### Early Savings

- Develop a new program to educate and encourage parents to initiate a 529 College Savings Plan and Baby Trust Funds; provide match funding for new plans.



# Proposed Recommendations for HOCP

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## ***Continue existing programs for youth ages 5-14 (Elementary & Middle School)***

### STEM Enrichment

- Continue providing STEM programming and field trips for school-aged youth

### Out of school programming

- Expand existing programming such as Piano Pals and Community Foundation

### Back to School

- Continue funding the annual Back to School event



# Proposed Recommendations for HOCP

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## ***Pilot new programs for youth ages 14-17 (High School)***

### College & Career Readiness

- Develop a new program to help youth explore multiple pathways including high-wage industries (i.e. Tech, Health, and Real Estate), preparing for college, and becoming an entrepreneur;
- Incorporate heavy emphasis on financial literacy and offer stipends;
- Integrate internships and mentorship;
- Builds a pipeline of youth for TAP and TDMS.

### Community Coaches

- Develop a new program to train youth as Community Coaches at HOC properties with a focus on outreach;
- Provides opportunities for youth to earn SSL hours.



# Proposed Recommendations for HOCP

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## *Pilot new programs for adults 18+*

### Community Health

- Develop a new program to train young adults age 18-24 as Community Health Workers to educate residents, conduct health screenings, and connect residents to physical and mental health resources.

### Career Advancement

- Develop a new program to assist young adults age 18-24 with pursuing higher wage opportunities through certifications and training.

### Asset Building

- Develop a new program to assist adults in the home buying process.

# Proposed Recommendations for HOCP

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## *Pilot new programs and events for adults 60+*

### Programs

- Partner with Senior Connection to provide older adults with transportation supports, food access, and outdoor excursions.
- Partner with CKC Farms to launch and expand onsite gardening programs.
- Partner with Senior Planet to provide older adults with technology supports and digital story telling programming to combat social isolation.
- Identify a partner to develop a senior companionship program including wellness checks via phone and/or in-person visits.
- Identify a partner to provide support with trust and estate planning.

### Annual Events

<b>Winter:</b> Fund an annual holiday store to provide older adults with an opportunity to select gifts for their loved ones.	<b>Spring:</b> Fund an annual Senior Prom to encourage socialization.	<b>Fall:</b> Fund Community Pop-Up Events to provide older adults with resources in the areas of health, transportation, food, etc.
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