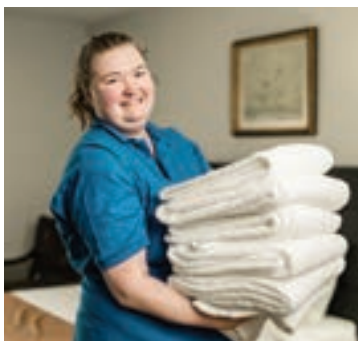




five-year strategic plan

fiscal years 2024-28

A HOME FOR EVERY PERSON IN SANIBEL/CAPTIVA – **THAT'S OUR COMMITMENT**



executive summary

Community Housing & Resources envisions a future where every person in Sanibel and Captiva Islands has affordable housing and equitable economic opportunity. We’re determined to make that dream real – and that requires a goal-driven plan along with an unwavering commitment. Hurricane Ian made it painfully clear that we needed a laser-focused set of strategies to keep our community moving forward, regardless of difficulties. To that end, CHR has developed this five-year strategic plan addressing key elements of that future: **people, community, growth, leadership and operations**. Success depends on all of us working together to build an even stronger island community.

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our vision

Community Housing & Resources envisions being the foremost community leader, most trusted charitable partner, and most effective advocate for affordable housing and services and equitable economic opportunity for all people of Sanibel and Captiva Islands.

we see a future of CHR having—

- A community of residents who are proud to be a part of CHR and who are a diverse mix of populations which are representative of Florida. Our residents are individuals and families in need of affordable housing who support the culture and character of our islands.
- An excellent working relationship with both the City of Sanibel and Captiva Community Panel and the respect of the broader Lee County and Florida as a model for affordable housing and resident resources.
- All existing properties refurbished and new properties built with reimagined facilities to expand our capacity. Alignment of the design and application of our buildings and properties to adapt to changing resident needs and the principles of resilience and sustainability.
- A remarkable staff and robust group of volunteers supporting the respected and accomplished Executive Director. A strong, dynamic, governing Board that focuses on policy and supports the Executive Director to achieve the organization's mission.
- A thriving, stable donor base that continues to grow including Sanibel and Captiva residents and businesses, vacationers and a broader population of people who value our contributions to society. Systems and technology that support our operations and facilitate control of our data.
- An integral role in the community and a champion of affordable housing and other critical causes on the islands through our representation with local organizations and governments, and through speaking engagements and community education.



our mission

To provide affordable housing and resources for families and individuals who serve and have served Sanibel and Captiva Islands, while maintaining the economic diversity that contributes to the extraordinary culture and continued well-being of our community.

our organization

We are a 501(c)(3) nonprofit organization focused on providing affordable housing and resources to eligible individuals on Sanibel and Captiva Islands in Florida. We operate with an Executive Director, valued staff, a volunteer Board of Directors, and a supportive network of dedicated volunteers.

our residents

Our residents are our foremost priority and have represented almost all businesses and non-profit organizations at one time or another on Sanibel and Captiva Islands. Since its establishment in 1979, CHR's residents have included police officers, firefighters, cashiers, restaurant staff, teachers, nonprofit employees, naturalists, medical professionals, landscapers, housekeepers and retirees. They have worked in hair salons, resorts, grocery stores, retail establishments, churches, banks, Sanibel-Captiva Conservation Foundation, J.N. "Ding" Darling National Wildlife Refuge, and the City of Sanibel, to name a few.

eligibility

Individuals and families will be considered for CHR housing if they are lower-income employees of a Sanibel-based company working on Sanibel or Captiva, or are long-time residents of our islands who are either retired and over age 62 or disabled. Successful applicants will be those who demonstrate financial need, island employment, and/or demonstrated involvement with our islands.

CHR utilizes an objective and comprehensive assessment process as outlined in the Sanibel Land Development Code to select CHR residents. The application form is available on our website at **SanCapCHR.org**.

our strategic focus

CHR has worked to develop this goal-driven, five-year strategic plan based on the **SMART** principle:

S *specific*
M *measurable*
A *achievable*
R *relevant*
T *time-based*

On the following pages, our plan is broken down into 5 key areas of focus:

STRATEGIC FOCUS #1 – Residents & Their Welfare

STRATEGIC FOCUS #2 – Community Relations & Volunteers

STRATEGIC FOCUS #3 – Expansion & Capacity

STRATEGIC FOCUS #4 – Leadership, Staffing & Committees

STRATEGIC FOCUS #5 – Funding, Finances & Systems

CHR will report progress regularly to our island communities as we carry out this plan, meet our goals, and achieve our vision.

STRATEGIC FOCUS #1

residents & their welfare

DESIRED OUTCOME – *A community of residents who are proud to be a part of CHR and who are a diverse mix of population representative of Florida. Our residents are individuals and families who support the culture and character of our islands and are in need of affordable housing and access to resources.*

GOAL 1	Formalize processes for CHR-provided resources to residents, including rent assistance and disaster relief programs.	<i>target completion</i> Q4 – 2024
GOAL 2	Create a process to continually update and expand information for CHR residents concerning other local resources available, including contacts for: <ul style="list-style-type: none"> • <i>FISH of SanCap</i> • <i>United Way</i> • <i>City of Sanibel</i> • <i>Job boards</i> • <i>Volunteer opportunities</i> • <i>Available grants</i> 	<i>target completion</i> Q4 – 2024
GOAL 3	Create a process for annual update and refreshing of useful safety and survival information to residents, including: <ul style="list-style-type: none"> • <i>Planning for crises, e.g. fire exits</i> • <i>Hurricane packets with evacuation details and requirements</i> • <i>Neighbors looking out for neighbors on a voluntary basis</i> • <i>Presentations by Sanibel police and fire department representatives</i> 	<i>target completion</i> Q1 – 2025

(continued)

STRATEGIC FOCUS #1 *continued*

<p>GOAL 4</p>	<p>Plan for and continue to maintain great, successful communication and relationships with residents via:</p> <ul style="list-style-type: none"> • <i>Social gatherings</i> • <i>CHR monthly newsletters</i> • <i>Holiday giveaways</i> 	<p><i>target completion</i> Q2 – 2024</p>
<p>GOAL 5</p>	<p>Create CHR Resident Community Liaisons representing each property to engage with CHR Staff and the larger community.</p>	<p><i>target completion</i> Q1 – 2027</p>
<p>GOAL 6</p>	<p>Seek regular feedback from residents via comment requests:</p> <ul style="list-style-type: none"> • <i>“Tell me something good”</i> • <i>“What suggestions do you have?”</i> <p>Provide link for submitting information in monthly newsletter.</p>	<p><i>target completion</i> Q1 – 2025</p>
<p>GOAL 7</p>	<p>Add one CHR resident to the CHR Board of Directors, following established Nominating Committee procedures. Develop a process to make such selection for nomination.</p>	<p><i>target completion</i> Q1 – 2025</p>

STRATEGIC FOCUS #2

community relations & volunteers

DESIRED OUTCOME – *To build an excellent working relationship with the City of Sanibel, the Captiva Community Panel, and the citizenry of both islands. To be an exemplary model for providing affordable housing and resident resources for broader Lee County and the State of Florida. Have an outreach program to educate the community about CHR, encourage volunteering, and create partnerships with other island non-profits.*

GOAL 1	Hold an Annual Meeting with CHR members, volunteers, staff, City, County, and other local officials each year.	<i>target completion Q1 – 2024</i>
GOAL 2	Create a grassroots Ambassador Program to inform the community about CHR and specific needs through networks and friendship circles.	<i>target completion Q1 – 2026</i>
GOAL 3	<p>Implement an organized and managed volunteer program that includes residents from Sanibel and Captiva.</p> <ul style="list-style-type: none"> • <i>List and describe volunteer opportunities on website</i> • <i>Encourage volunteering through speaking engagements and participation with other groups</i> • <i>Assign a volunteer coordinator to create a database of volunteers and volunteer opportunities and ensure that requests to volunteer with CHR are answered</i> • <i>Publicly thank volunteers at the Annual Meeting</i> <p>Differentiate among volunteer opportunities that are ongoing, occasional, committee positions, or one-time events.</p>	<i>target completion Q2 – 2025</i>
GOAL 4	Broaden community involvement to Captiva by actively seeking and inviting qualified residents/employees from Captiva to serve on committees and the Board.	<i>target completion Q2 – 2025</i>
GOAL 5	Reinforce relationships with the City of Sanibel and Lee County to underscore the need for fiscal support and expansion needs, and to encourage public support of CHR.	<i>target completion Q2 – 2025</i>

STRATEGIC FOCUS #3 expansion & capacity

DESIRED OUTCOME – *Creating a number of CHR rentable residences at a minimum of 3% of the Sanibel and Captiva housing totals through refurbishment and repair of existing residences and the purchase of new properties. New properties will be constructed using principles of green and resilient building.*

GOAL 1	Refurbish all existing, repairable residences so they are inhabitable by displaced residents or newly qualified residents.	<i>target completion Q1 – 2025</i>
GOAL 2	<p>Create a process /checklist to facilitate prompt, responsible decisions on land acquisitions, to include such factors as:</p> <ul style="list-style-type: none"> • <i>Available buildable area and density</i> • <i>Location</i> • <i>Most efficient application of unit size to meet needs</i> • <i>Engagement of the Planning Department</i> • <i>Offer price</i> <p>Determine other factors to include by studying affordable housing programs in other communities and employing best practices. Put process/checklist into play immediately to evaluate opportunities available, and update quarterly with available sites. Develop a point system to rank available properties to proactively pursue the best opportunities.</p>	<i>target completion Q2 – 2024</i>
GOAL 3	Develop with the City and/or County incentives for property owners to sell or donate land to CHR.	<i>target completion Q1 – 2025</i>
GOAL 4	Develop a process for permitting, design, engineering design, and construction of new residential units. Work with City Council to create an appropriate resolution.	<i>target completion Q1 – 2025</i>

(continued)

STRATEGIC FOCUS #3 *continued*

GOAL 5	Research and evaluate potential future building designs, such as individual bed/bath spaces with central living, dining and kitchen areas. Consider viability of alternate designs in order to expand capacity, maximize occupancy, improve efficiency and meet the needs of future CHR residents.	<i>target completion</i> Q1 – 2026
GOAL 6	Develop a plan of action with regards to CHR’s role for off-island housing partnerships with adjoining cities. Develop a plan for management of residential units over commercial properties and potential off-island management of below market housing for island employees. Plans of action will be consistent with the CHR Mission.	<i>target completion</i> Q4 – 2027
GOAL 7	Prepare detailed grant application information required by HUD to submit CHR’s request for CDBG-DR funding available in Lee County’s \$1.1B federal grant. Coordinate detailed information requests with the City of Sanibel.	<i>target completion</i> Q2 – 2024
GOAL 8	Achieve the desired number of CHR residential units through rebuilding, new building and/or acquisitions as measured by 3% of the total of single-family residences on Sanibel and Captiva islands.	<i>target completion</i> Q4 – 2028

STRATEGIC FOCUS #4

leadership, staffing & committees

DESIRED OUTCOME – *A remarkable staff collaborating with the respected and accomplished Executive Director. A strong, dynamic, governing Board that focuses on policy, and committees that support the Executive Director in achieving the organization’s mission.*

GOAL 1	Set policies and procedures in place for the organization to develop so that staff can manage most of the work. Measure organizational efficiency via Board annual self-assessment at the start of each fiscal year (October).	<i>target completion</i> Q1 – 2027
GOAL 2	Prepare and present a corporate governance overview to the CHR Board following each annual November meeting to inform new Board members and refresh existing members.	<i>target completion</i> Q2 – 2024
GOAL 3	Determine need for additional staff to assist with ongoing day-to-day work, including bookkeeping and fundraising, while considering the appropriate mix of consultants and full-time staff.	<i>target completion</i> Q1 – 2025
GOAL 4	Annually propose two or three new members to the Board, to be brought forward for approval prior to the annual meeting in November.	<i>target completion</i> Q1 – 2024
GOAL 5	Request Committee Chairs to recruit new members to the Board’s committees to keep ideas fresh and team members energized. Consider term limits for committee members aligned with Board term limits.	<i>target completion</i> Q4 – 2024

STRATEGIC FOCUS #5

funding, finances & systems

DESIRED OUTCOME – *Fund strategic initiatives detailed in this plan and provide fiscal support of operations, resident requirements, and building refurbishments. Ensure that CHR has a moderate reserve to protect against unknown needs, and systems and technology that support our operations and facilitate control of our data.*

GOAL 1	Develop and populate a tool in order to identify strategic funding needs, prioritize projects and facilitate other elements identified in this plan. Once in place, update the tool semi-annually for successful attainment of funding and changing priorities.	target completion Q3 – 2024
GOAL 2	Develop and implement a process to request Board approval of grant and foundation proposals over \$100,000 prior to completing/submitting an application. Ensure that only those grants are sought that CHR is interested in adopting and willing to implement.	target completion Q3 – 2024
GOAL 3	Develop a process to encourage donations via awareness, dedication, and participation by individual and business donors and potential donors. Expand sphere of persons, businesses and geography to include all those who would be interested in supporting below market rate housing. Plan for one significant fundraising event each year and consider smaller events as appropriate.	target completion Q1 – 2025
GOAL 4	Design a capital campaign program to be put into place upon securing properties for building project.	target completion Q1 – 2025

(continued)

STRATEGIC FOCUS #5 continued

<p>GOAL 5</p>	<p>Ensure cash is managed and invested prudently to protect the organization and provide cash as required for projects. Develop a line of credit and establish a pathway for funding land acquisition(s).</p>	<p><i>target completion</i> Q1 – 2025</p>
<p>GOAL 6</p>	<p>Evaluate adequacy of systems and replace as necessary or purchase a new to manage:</p> <ul style="list-style-type: none"> • <i>Accounting system</i> • <i>Donors and donations</i> • <i>Payroll</i> • <i>Buildings and maintenance</i> • <i>Document control</i> 	<p><i>target completion</i> Q2 – 2024</p>
<p>GOAL 7</p>	<p>Establish an unrestricted Operating Reserve totaling \$740,000, approximately one year of normal operating expenses, apart from the Capital Replacement Reserve, to protect against unforeseen events. Set aside 10% of donations and unrestricted grants until the \$740,000 is established, and maintain that balance going forward.</p>	<p><i>target completion</i> Q4 – 2025</p>

closing thoughts

FROM OUR EXECUTIVE DIRECTOR

For all the tragedy and devastation wrought by Hurricane Ian, it also taught us a powerful lesson: The future is always in flux. In a moment, our destiny can change. But that doesn't mean we shouldn't plan for the future; in fact, it makes planning all the more imperative.

The storms of life affect all of us, and none more than the people we serve. The need is urgent today, and it's likely to be urgent tomorrow. If we don't act, if we don't map a course toward our vision and begin the journey, we will fail our clients, our community and ourselves.

Failure, as the saying goes, is not an option.

I'm excited by this strategic plan and grateful to everyone who helped in its development. Now we need every person to be part of making it real - as a donor, as a volunteer, as a CHR staff person, as a voice for those we serve. That's the invitation, and the challenge, that I place before you.

Thank you for joining us on this journey.



Nicole McHale
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report prepared by and committed to—

CHR STAFF

Nicole McHale, *Executive Director*

Bonnie McCurry, *Housing Administrator*

Savannah Miller-Berg, *Executive Administrative Assistant*

Harold “Buddy” Long, *Facilities Manager*

CHR BOARD OF DIRECTORS/OFFICERS

Roger Grogman, *President*

Erika Steiner, *Vice President*

Doug Babcock, *Treasurer*

Laura DeBruce, *Secretary*

Bob Miller, *Chair Landlord/Tenant Committee*

Shelley Greggs, *Chair Fundraising Committee*