

HACM STAKEHOLDER SURVEY RESULTS

STRENGTHS OF HACM:

Board Response:

- The long, significant positive history of the HACM impact on affordable housing
- The mission commitment of the new Board and interim HACM staff leadership
- The improved levels of transparency and community engagement
- Resident-centered programming and empathy
- Resources leveraging, and expanded partnerships, linked to CNI
- Improved financial accountability provided by the new CFO

Staff Response:

- Improved leadership of the Board and core leadership / management staff
- New policies that address previous agency mistakes and mismanagement
- Institutional experience and integrated YARDI systems for continuous improvement
- Many staff that believe in the mission and meeting resident needs
- Some improvement in teamwork and teambuilding

Resident / Community Response:

- Some improvement in the maintenance / care of the properties
- Staff in general are good to work with
- Some improvement in phone answering and call backs

WEAKNESSES OF HACM:

Board Response:

- Age of housing stock and need for investment and modernization
- Identity as being under a Recovery Agreement / Sustainability Plan
- Need for organizational, compliance and program performance improvements
- Need to strengthen leadership, capacity-building and workforce development
- Need to improve communications and transparency at all levels
- Slow response times on decision-making and problem-solving
- History of financial crises and mismanagement
- Culture of complacency and resistance to change

Staff Response:

- Inability to attract and retain quality staff / loss of institutional knowledge
- Current skill gaps in the labor pool
- Low staff morale and trust
- No incentives for performance results and no raises
- Poor resident follow through and accountability
- Lack of quality communications and transparency
- Inability to make timely decisions and to solve problems / no sense of urgency
- Too much Board micromanagement of operations
- Non-performing employees are not being held accountable
- Too much reliance on manual processes / need to be paperless
- Lack of internal coordination among the business units
- Financial systems are weak and financial reporting is not timely
- Customer service in general needs much improvement
- Lack of Board / executive staff unity and collaboration
- Lack of training particularly for front-line staff
- Poor work environment, work culture, and workload imbalances
- Significant staff shortages throughout the agency

Resident / Community Response:

- Staff shortages particularly on the properties and poor property management
- Slow customer service response times
- Caseworkers need to be more respectful
- The organization in general needs improvement
- Poor screening and evaluation of applicants to be new residents
- Inadequate security and safety on the properties
- Inadequate regulatory compliance

OPPORTUNITIES FOR HACM:**Board Response:**

- Expansion of the affordable housing portfolio
- Our national provide for attracting housing investor, partners, and talent
- CNI approach to building communities and mixed-income neighborhoods
- Furthering the economic mobility of our residents
- More partnerships with the City, universities, employers and services providers
- Hiring a CEO not controlled by locals and that is open to residents

Staff Response:

- Promoting positive changes resulting from earlier scandals and mistakes
- Changing public perceptions / providing more exposure and transparency
- Improving our image as a quality workplace and progressive employer
- Improving our understanding and training on the issue of mental illness
- Seeking out new funding streams and leveraging resources with partners
- Expanding the affordable housing portfolio
- Providing more support services and engagement with residents
- Improving information technology / going paperless
- Affordable housing is in the forefront
- Improving Board leadership / staff leadership
- More focus on rebuilding the infrastructure

Resident / Community Response:

- Hiring more staff at the properties
- Seeking out better vendors
- Improving staff engagement with residents
- Improved safety, security, and pest control
- Having a clean slate with a new CEO
- More support services and job paths for residents

THREATS TO HACM:**Board Response:**

- Inadequate federal funding, HUD staffing, and HUD policy changes
- Rising construction costs, inflation, and labor shortages
- Market pressures on affordable housing / demand outpacing resources
- Local competition for funding to meet many public / philanthropic causes
- General challenges with poverty, racial disparities, and public safety
- Threat of a HUD receivership
- Community apathy and a poor public image and opinion of HACM
- Lack of support from Common Council
- Lack of political and community stakeholder support

Staff Response:

- Current agency reputation and public image
- Misunderstandings of our mission and work

- Inadequate funding and poor federal policies
- Slowness in decision-making and problem-solving
- Aging housing and infrastructure
- Cyber security
- HUD extreme levels of compliance and audits
- Poor cooperation and collaboration between business units
- Poor communications internally and externally
- Poor recruitment and retention
- Increased demand for affordable housing
- Political shifts in policies and priorities
- Lack of confidence from investors
- Need more of a business focus
- Shortage of staff training and professional development

Resident / Community Response:

- HUD in general
- Need for improved maintenance of properties
- Residents losing assistance due to caseworker negligence
- No pet controls by staff and residents
- Better screening of residents
- Misuse of agency funds

WHAT ARE SOME OF THE PREFERRED SKILLS / ABILITIES NEEDED IN THE CEO?

Combined Response:

- Leadership / inspirer
- Integrity / humility
- Affordable housing knowledge and experience
- Community engagement and awareness
- Strategic planning, thinking, and visioning
- Operations management
- Relationship building/ interpersonal skills with all stakeholders
- Innovator / entrepreneur
- Change agent / culture adaptation
- Emotional maturity
- Resident engagement and empathy
- Business / finance acumen
- Decision-make and problem-solver

- Teambuilder
- Political acumen
- Multi-tasker
- Industry engagement and awareness

SHOULD CANDIDATES BE REQUIRED TO HAVE STRONG EXPERTISE AND BACKGROUND IN ALL HOUSING PROGRAMS?

Combined Response:

18 respondents indicated that a general knowledge of all of the programs is desired. The management team and their staff need to have the strong knowledge of these programs. The CEO should ideally be strong in at least one of these program areas and be committed to improving program strengths through professional development. 7 respondents indicated that Public Housing is the most needed program expertise, 7 indicated that HCV is the most needed program expertise, and 3 indicated that LIHTC is the most needed program expertise. While LIHTC is recognized as much of the future of the agency it is likely that in the foreseeable future external consultants and developers will be relied upon.

8 respondents indicated that the CEO should be expected to have a strong expertise and background in all housing programs.

SHOULD THE BOARD CONSIDER OUTSTANDING LEADERS THAT MAY LACK SPECIFIC AFFORDABLE HOUSING EXPERIENCE?

Combined Response:

Yes – 16

No – 13

HOW EXTENSIVE OF A DEVELOPER BACKGROUND AND SKILLS IS NEEDED IN A CEO?

Combined Response:

Extensive – 5

General – 13

None – 8

The majority of respondents indicated that candidates should have some general knowledge and experience with affordable housing development, but it is not expected that candidates will be experts in all aspects of development. Ideally candidates should understand the development process, understand development financial options, know how to build a development team, and know how to negotiate and collaborate with development consultants and developers.

HOW SUCCESSFUL HAS HACM BEEN IN MARKETING AND PUBLIC RELATIONS AND WHAT SKILLS SHOULD THE CEO HAVE IN ADDRESSING THIS ISSUE?

Combined Response:

On a scale of 0 (lowest) to 5 (highest) the average of the scores for this question was a low score of 1.5. Marketing, public relations and image-building is a significant issue and concern that needs to be evaluated in the skill sets and experience of the next CEO. Some of the critical skills needed are communications / listening skills, relationship-building, interpersonal skills, transparency, relatability, honesty, collaboration, ambassador, and authenticity. Use of available technology is also important. Marketing should be closely aligned with the agency vision and mission.

HOW SUCCESSFUL HAS HACM BEEN IN BUILDING STAKEHOLDER PARTNERSIPS AND WHAT SKILLS SHOULD THE CEO HAVE IN ADDRESSING THIS ISSUE?

Combined Response:

On a scale of 0 to 5 the average of the scores for this question was a low score of 1.4. Building stakeholder relationships are seeing an improvement recently, particularly with CNI. However there is still much growth opportunity to reach many additional stakeholder partners in the community. The skills sets highlighted for building partnerships were generally consistent with the marketing skills referenced above.

HOW SUCCESSFUL HAS HACM BEEN IN PROVIDING RESIDENT ENGAGEMENT AND CUSTOMER SERVICE? WHAT SHOULD HACM LOOK FOR IN ITS CEO REGARDING THIS?

Combined Response:

On a scale of 0 to 5 the average of the scores for this question was a low score of 1.75. While this is a low score the survey responses indicate that HACM is now much more aware of the

need to address this issue and is improving in its customer service. The CEO needs to define and monitor performance metrics related to customer service and customer satisfaction. The performance reviews for staff need to include metrics that relate to their job description. Regular engagement and feedback from residents should be structured to provide for performance updates.

HOW MUCH OF THE CEO TIME AND ENERGY WILL NEED TO BE EXPENDED ON THE MANAGEMENT, PROGRAM OVERSIGHT, AND COMPLIANCE?

Combined Response:

DOES HACM NEED A CEO THAT IS A STRONGER LEADER OR A STRONGER MANAGER?

Combined Response:

Leader – 15

Manager – 7

Both – 9

Many of the “both” responses indicated that a stronger manager is needed while in this recovery mode but that long-term the role should be more of a leader.

DOES HACM NEED A STRONGER RELATIONSHIP MANAGER OR TASK MANAGER?

Combined Response:

Relationship manager – 15

Task manager – 5

Both – 7

Many of the “both” responses indicated that a task manager is needed while in this recovery mode but that long-term the role should be more of a relationship manager.

DOES HACM NEED MORE FOCUS ON INTERNAL OPERATIONS OR EXTERNAL RELATIONS?

Combined Response:

External focus – 12

Internal focus – 11

Both – 11

Many of the “internal focus” or “both” responses indicated the urgency of the recovery mode but that long-term the focus should be more on external relations.

DOES HACM NEED A CEO MORE FOCUSED ON OUTCOMES OR OUTPUTS?

Combined Response:

Outcomes – 22

Outputs – 2

Both - 5

DOES HACM NEED A CEO MORE PUBLIC CAUSE ORIENTED OR MORE BUSINESS ORIENTED?

Combined Response:

Business oriented – 16

Public cause oriented – 6

Both - 7

WHAT ARE SOME OF YOUR LONG-TERM GOALS FOR HACM?

Board Response:

- Transitioning out of troubled status
- Exceeding HUD benchmarks and performance standards
- Quality maintenance and modernization of properties
- Redevelop and reinvest in aging properties
- Provide for mixed-income / mixed-finance housing developments
- Expand the affordable housing portfolio
- Utilize CNI to leverage resources and build partnerships
- Advance resident economic mobility through workforce and education outcomes
- Reduce generational poverty
- Profile success stories and address negative perceptions

- Efficiency in portfolio management
- Getting out of debt and building a reserve

Staff Response:

- Become a national affordable housing leader
- Transition out of troubled status
- Be compliant in all areas
- Proactively change and adapt
- Build teamwork
- Follow clearly defined policies and procedures
- Achieve a financial turnaround
- Rebuild trust with and among staff and residents
- Provide for agency stability, accountability, and respectability
- Have a mission focus with a business emphasis
- Long-term visioning and strategic planning
- Pursue no-HUD funding opportunities
- Strengthen support services partnerships
- Valuing staff, building morale, and motivating staff

Resident / Community Response:

- Restore trust among all stakeholders
- Reposition and restructure assets
- Provide more quality staff on properties
- Improved customer services
- Streamlined processing for residents
- Resolving the agency financial issues
- Providing sustainable, high quality housing
- Achieving clean audits
- Rebuilding staff morale and a quality workplace
- Improved neighborhood relations and partnerships

WHAT ARE SOME OF THE MAJOR PRIORITIES FOR THE CEO IN YEAR ONE?

Combined Response:

- Completing the HUD Recovery Plan
- Addressing staff shortages, workload imbalances, and improved staff morale

- Improving customer service, resident relations
- Training and professional development of staff at all levels
- Improving communications internally and externally
- Upgrading of properties and improving security and safety
- Rebuilding trust and credibility
- Building a culture of accountability
- Improved marketing, public relations, and image-building
- More of an on-site presence at properties
- Address the financial stability and cash position of the agency
- Clean house on unqualified and unproductive staff
- Set performance expectations for all staff
- Focus on teambuilding and teamwork
- Setting new goals with the Board
- Completing a probationary period set by the Board
- Providing for competitive wages and benefits
- Improving the Board - staff relationships

SHOULD THE CEO BE REQUIRED TO LIVE IN THE CITY OF MILWAUKEE?

Combined Response:

Yes – 19

No – 7

Somewhat - 5

WHAT OTHER CONSIDERATIONS SHOULD THE BOARD FACTOR INTO THE SELECTION OF ITS NEXT CEO?

Combined Response:

- Prior success improving troubled agencies
- Positive history and track record working with residents
- Stability in previous housing positions
- Expertise in affordable housing programs, policies, and procedures
- Resident-focused leader committed to improving residents' lives
- Strong decision-maker and problem-solver

- Highly educated in relevant academic fields / professional certifications
- Woman of color
- Strong leader
- Relationship builder
- Consider internal candidates
- Person of integrity
- Business / financial acumen
- Communicator / listener
- Someone who rises above politics
- Strategic planner and thinker
- Teambuilder
- Transparency