

Overarching Goal	Activity	Metrics/Final Product	Lead Dept	Timeline	Due Date	Current Status	Updates
PARTNERSHIPS Emphasize the development of strategic community partnerships through communication and outreach	Create list of organizational values, building on mission and vision	Organizational values created and shared	Comm Services	6 mos	Dec-26	On track	Will be completed by end of year, after brand update.
	Expand information available to the public about who we are and who we serve in order to better communicate our purpose to the community and our clients	Updated About Us page published on website	Comm Services	6 mos	Sep-25	Completed	Has been updated, will continue to improve over course of year.
	Develop new logo and brand guidelines in order to best represent ourselves to the community and help to clarify who we are as an organization	New logo developed and fully implemented	Comm Services	6 mos	Sep-25	Delayed	Staff has gathered feedback and is working with a consultant. Incorporating add'l feedback with goal of completing by end of 2025.
	Develop a Communications & Community Engagement Plan to better share resources and updates with the community	Communications & Community Engagement Plan developed and executed	Comm Services	9 mos	Dec-25	On track	Have started discussions, reviewing examples. Draft due beginning of Nov for Dec completion.
	Board and Leadership Team connect with community partners to ensure understanding and ongoing support of BHA mission, vision and plans	Hold >2 events per year for partners and/or the public (in addition to Services client events)	Comm Services	Annually	n/a	On track	Hughes Station event completed.
HOUSING PROGRAMS & SERVICES Strengthen and expand housing and services programs while utilizing funds efficiently and ensuring quality customer service	Complete a review of the current 5-year Moving To Work (MTW) program, analyzing current implementations and challenges current participants have faced	Submit MTW supplement plan	Occupancy	18 mos	Dec-26	On track	Meeting with Jonathan weekly and will submit our MTW supplement plan by the deadline
	Maintain status as a "high performing agency" with HUD	ABA utilization of 95% or more and compliance with STS requirement	Occupancy	Annually	n/a	On track	YTD through 05/2025 we are above 95% for our ABA utilization
	Maintain client satisfaction rate for Community Services & Occupancy activities of 90%	90% client satisfaction rate maintained for Comm Services.	Comm Services/ Occupancy	Ongoing	n/a	Delayed	Services has maintained 100% satisfaction rates if you exclude the n/a's. Occupancy will launch their survey 10/1
	Respond to clients the same day whenever possible, always within 24 hours	Telephone log and contact tracker indicating 95% were responded to same day, reviewed quarterly	Comm Services/ Occupancy	Quarterly	n/a	On track	Would need a new method since Mitel is gone, have to figure out new way to track.
	Launch newsletter for clients to provide up-to-date info about programs and upcoming events; promote self-sufficiency opportunities	Newsletter launched and distributed consistently	Comm Services	6 mos	Dec-25	On track	Have started planning this, will launch by end of year.
	Engage at least 3 new partners or deepen relationships with existing partners to better meet client needs	3 partnerships deepened or created per year	Comm Services	Annually	n/a	On track	FNBO, EFNEP, AdCo Food Bank, Bicycle nonprofit, and more.
	Formalize resident committee structure and expand number of active committees	Formal structure developed and implemented with at least one committee	Comm Services	9 mos	Dec-25	On track	Planning to relaunch. Have met w/ staff at Boulder Housing Partners, Housing Catalyst, and Maiker to get their insights.
	Improve data and client management systems and data collection processes for services provision and grant seeking	Research and implement a data and client management tool	Comm Services	12 mos	Dec-26	On track	Have started this by increasing amount of data collected.

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	Formulate criteria defining BHA's services, program scope and target areas	Development of criteria for services, project and program evaluation	Comm Services	6 mos	Sep-25	Completed	This has been created.
DEVELOPMENT & PROPERTY MANAGEMENT Maintain an ambitious pipeline of development and rehabilitation projects, while also building resources to expand property management	Evaluate each SLP opportunity based on benefit to the community and the project. Utilize criteria for qualifying SLP selection and requirements in partnership agreements based on BHA's mission and goals	BHA maintains 3 SLPS based on established criteria.	Executive/ Finance	Ongoing	N/A	On track	Drafted criteria for SLPs, planning to bring to Board in November. 3 SLPs currently.
	Provide input on City policies that affect development in the community	Evaluate activities and initiatives that align with City's Housing Needs Assessment recommendations quarterly.	Executive	Quarterly	N/A	On track	Ongoing mtgs w City staff for recs for City Council.
	Establish thresholds and criteria for determining BHA's role in development projects and housing initiatives (for example: homeownership, SLPs, and rental opportunities). Review annually	Thresholds and criteria based on financial and operational capacity as defined by CHFA and investors.	Executive/ Finance	6 mos	Aug-25	Delayed	"Advisory group" to evaluate opps in Brighton, provide analysis to bring to Board.
	Support current and future community affordable housing projects by leveraging BHA and partnership resources and expertise to fill potential development gaps	Maintenance of a Five to Ten Year Pipeline.	Executive/ Finance	Ongoing	N/A	On track	Outcomes of group referenced above will help define what this looks like.
	Work with regional partners to encourage and support the development of affordable housing	Strengthen relationships with two jurisdictions.	Executive	12 mos	Dec-25	On track	Adams County (MOU), Emergency Housing Vouchers (DOH Partnership)
	Identify and begin tracking data to determine community and regional impact of affordable housing	Creation of metrics to define/track community impact	Executive	6 mos	Oct-25	Completed	Signed agmt w data consultant, using metrics in HNA. Still discussing who is responsible for which metrics.
	Support the creation/preservation of over 100 units per year through '27	Average of 100 units per year created or preserved	Executive	Ongoing	Dec-27	On track	Well ahead of this. 120 in rehab, 46 in debt by BHA, involved in SLP for 264 units.
	Create a long-term asset management plan for property rehabs, refinances, and financial sustainability, ensuring each property meets its financial targets, verified through quarterly financial reports, RAD OCAF rent compliance, and RADII rent restrictions	Creation of asset management plan and timeline	Finance/ Asset Mgmt	24 mos	Feb-26	On track	This is a combination of sale of units, property mgmt to 3rd party, rehab of Hughes, and bringing Property Operations up to speed and reviewing portfolio.
	Focus on the performance of the LIHTC properties, including occupancy and distribution metrics, verified through financial statements and CRM software reporting	Ensure that LIHTC properties maintain an occupancy rate of 93% or higher, delinquency no more than 10%, and rents are in line with most recent LIHTC rent schedules in annual rental income and \$300k in LIHTC distributions. Achieve for all properties by due date, then maintain	Finance/ Asset Mgmt	24 mos	Feb-26	Delayed	Jack summary of audits for LIHTC forthcoming, call w Terra to follow. Noting that Hughes rehab will delay completion for that property until rehab complete.
	Refine policies and procedures for properties, including a property management plan (PM Plan), and continue to evaluate based on best practices and industry standards	Creation and ED/DD approval of a comprehensive Policy and Procedures Handbook and PM Plan	Asset Mgmt	12 mos	Feb-26	On track	3rd party property manager for RAD & RADII will take care of this for those, Hughes still needs to be updated. Likely will be done ahead of schedule.

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	Continue to refine the annual risk assessment process to ensure CIRSA insurance audit compliance and exceptional asset management	Maintain a CIRSA audit score of no less than 95% annually	Operations/ Asset Mgmt	Annually	n/a	On track	Will be handing this over to new staff moving forward.
	Develop emergency response manual	Development and ED/DD approval of emergency response manual	Operations/ Asset Mgmt	12 mos	Feb-26	On track	Have drafted. Manager view drafted and will trim down to draft all staff view after ERT on 8/8/2025. Likely will be completed ahead of schedule.
	Conduct an operational optimization study of BHA's portfolio	Establish thresholds for financial and operational targets through the study with a final report and recommendation to ED/DD	Executive/ Finance/ Asset Mgmt	18 months	Aug-26	On track	Consultant is working on this.
	Develop Risk and Property Condition Assessment processes and templates for all BHA properties to be conducted annually	Creation of processes, procedures, and templates for annual assessments and ED/DD approval	Asset Mgmt	20 months	Nov-26	On track	Staff is working to put this together.
	Formally establish annual key performance metrics (KPIs) for property management, including a resident satisfaction survey, maintenance response times, and other operational metrics	Development of KPIs and ED/DD approval	Asset Mgmt	12 mos	Feb-26	Not started	Working to clean up systems to be able to start tracking these.
	Review property portfolio and continue to prioritize high-risk or low-yield assets for disposition	Analysis of priorities for portfolio liquidation	Finance/ Asset Mgmt	24 mos	Dec-26	On track	Prepping sale of final regular unit. Likely will be completed ahead of schedule.
GRANTS & INVESTMENTS Diversify financial resources and develop systems to ensure long-term sustainability	Apply for at least one grant in 2025 with a partner agency in order to expand grant opportunities and strengthen programs	Grant submitted with partner agency	Comm Services	12 mos	Dec-25	On track	Have built relationship with AdCo food bank and planted the seed to potentially partner in the future. Have partnered on food drive. No specific opp identified. However plan to begin working with consultant by end of October, which will help with strategy. Recently applied with DOH for Adams County HOME funds for an expanded TBRA Program.
	Expand list of possible funding sources & identify and apply for at least 3 new sources in 2025	Applications submitted for 3 new grants by end of year	Comm Services	12 mos	Dec-25	Completed	3 new grants applied for: CHFA Direct Effect, AdCo SPARC, and Gates Foundation.
	Keep matrix of funding resources updated to track possible grants, applications, and results year-to-year and develop an annual funding strategy	Grants funding strategy that is reviewed annually	Comm Services	Ongoing	n/a	On track	Matrix is developed, will continue to update.
	Explore possibility of creating nonprofit (CHDO) to help fund programs/services and expand fundraising opportunities	Report w/ options, recommended next steps, example organizations	Comm Services	12 mos	Dec-26	On track	Nonprofit is being created, will be exploring how to use and potential of converting to a CHDO in 2026.
	Pursue projects and investment opportunities that enable BHA to increase NOI	Annual report of investment and property performance, including a plan for adjustment as-needed	Finance	Annually	n/a	Delayed	The finance subcommittee will need to recommend a new flexible framework in the face of interest rates falling so low from active resolution.

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OPERATIONAL EFFICIENCY To ensure consistency, effectiveness, and maximum community impact	Perform an internal audit to assess the current state of IT infrastructure, tools, and processes	Comprehensive IT audit	Operations	12 months	Dec-25	Delayed	Began talking to Vendors but need to seek out consultant to provide expertise and assist with audit
	Refine retention policy to ensure alignment with current federal and local guidelines and best practices	Implement retention policy to address data storage and management	Operations	12 mos	Dec-25	On track	Need to update spreadsheet to reflect P:Drive rather than Google Drive
	As the agency grows, review and update policies as needed	Develop and update tracker of new policy requirements and status of policy updates	Operations	Ongoing	n/a	On track	Continuing to revise policies as needed and need to sit down with departments to track all policies and tie to retention policy
	Modernization/streamlining of HAP processing	Issuance of HAP via electronic methods	Finance	6 mos	Jun-25	Delayed	Only waiting on the final penny (\$.01) test. After Yardi conversion this will be integrated into the LIVE database.
	Develop Financial Procedures Manual to formalize processes	Financial Procedures Manual created	Finance	12 mos	Dec-25	Delayed	Expect to still happen by end of 2025.
	Update Procurement Policies & Procedures based on regulations and best practices	Procurement Policies & Procedures updated	Finance	9 mos	Dec-25	Not started	Process of transitioning to Finance department. Noting that we could potentially review City's P&Ps.
	Conduct comprehensive review of organizational efficiency, department by department, to identify opportunities for improvement	Departmental audit report	Executive	9 mos	Sep-25	Delayed	This will be spearheaded by ED
	Develop and maintain a staffing plan including outsourcing and internal resource requirements	Staffing plan revised annually	Operations	Annually	n/a	On track	Each leadership team member will work on plan for their department with Operations department ensuring completion by all and collection of each plan to build into one document
CULTURE & PEOPLE Cultivate a respectful, fair-minded and high-	Provide educational opportunities to help BHA Commissioners expand their knowledge and understanding of affordable housing and its complexities	Board Meeting Trainings with 80% of BHA Board Members attending at least one training per year	Operations	Annually	N/A	On track	NAHRO was offered to Commissioners in May
	Ensure BHA staff is provided with adequate training to best serve our community and provide opportunities for advancement	BHA staff attend at least 2 trainings annually	Operations	Annually	N/A	On track	Have shared CHFA trainings, offered NAHRO, and Housing Colorado
	Implement board orientation (how to be a board member, how to conduct themselves) and work with the Board Chair to identify gaps in knowledge and understanding and develop or identify trainings to offer to board members as needed	Board Orientation completed within 2 months of appointment	Operations	Ongoing	N/A	On track	Have provided Commissioners with handouts on Board procedures
	Create a board procedure manual including a formal process of how BHA Bylaws are enacted with board orientation process included.	Board procedure manual	Operations	6 mos	Jun-25	Completed	Have functional draft, but needs some work
	Conduct an employee survey to evaluate employee retention, satisfaction, and performance	Employee survey launched and then conducted annually	Operations	6 mos	Jun-25	Delayed	Will work with HR Choice on drafting survey and distribute to staff

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performance culture	Promote acknowledgment and recognition of employees to show appreciation and motivate for success	Develop Employee Recognition Procedure	Operations	3 mos	Mar-25	Completed	Implemented work anniversary recognition
	Continue to improve upon employee review process by conducting trainings annually and providing opportunities for feedback	Trainings and feedback opportunities conducted annually	Leadership Team	Annually	N/A	On track	Will provide training in Nov/Dec
	Conduct needs assessment to understand organizational needs and identify gaps in current career progression opportunities.	Needs assessment complete	Leadership Team	12 mos	Dec-25	Delayed	See row 44 for status update.
	Uphold Fair Housing and Equal Opportunity guidelines that prohibit discrimination based on race, color, sexual orientation, gender, identity, religion, national or ethnic origin, familial status, or disability.	Commit to equity in processes, procedures, policies, and outcomes	Operations	Ongoing	N/A	On track	Completed one fair housing training this year and will continue to provide trainings as available. Looking to bring on DEI consultant in Q4 to provide additional trainings and to audit current policies, procedures, and hiring process etc. Also hired a consultant to help advise us directly on Fair Housing and Equal Opportunity.