

# *Strategic Plan 2024-2025*





Dear Friend,

*It is with great pleasure that we present to you CASA of Oregon's Strategic Plan for 2024-2025.*

When we first began our work more than 35 years ago, our goal was to provide services and quality affordable housing to farmworkers and their families who had few places to turn. Today, we continue to prioritize the needs of farmworkers; however, our mission has expanded:

*Working with community organizations and individuals, CASA builds generational wealth for those who have been marginalized, specifically farmworkers and BIPOC communities, through advocacy, asset building, organizing, and affordable housing development.*

**We want to level the playing field and ensure equity in a state where affordable housing is out of reach for far too many.**

We are proud of what we have accomplished, but know there's much more to be done. Guided by our Mission, Vision, and Values, our strategic plan charts the course for our teams to apply an equity lens to everything we do, from preserving manufactured home communities to providing matched savings programs. Internally, we are creating a structure and team to advance principles of equity and economic justice among staff and board.

Another important element of our work is advocacy with local, state, and federal entities. We have invested in a lobbying and advocacy firm, and it is our hope that our already strong relationships with legislators and agencies will flourish, leading to new opportunities and investments in the community.

We are excited to be embarking on this journey, and proud of the progress we have made to date. None of this would be possible without partners like you—your conviction that housing is a human right fortifies our work, and we thank you for your ongoing support and belief that, together, we can create a different kind of world.



In solidarity,

**Peter Hainley**, Executive Director,  
CASA of Oregon

*CASA of Oregon is a nationally-recognized leader in promoting housing and economic justice for historically underserved populations throughout the state.*

Founded in 1988, CASA is rooted in a deep and rich history of facilitating economic and housing opportunities for agricultural workers and their families. CASA of Oregon has expanded in recent years to reach other historically marginalized populations, such as veterans; people with disabilities; the lower-income workforce; and Black, Indigenous, and People of Color (BIPOC) communities, especially in rural areas.

Our approach to closing the wealth gap is comprehensive and steeped in our values of equity and housing as a human right. To achieve economic parity, we work in four key areas:

**WE HELP BUILD COMMUNITY**

We partner with trusted local organizations to construct and renovate affordable housing. We help develop accessible community services such as health and Head Start centers.

**WE HELP PEOPLE ACQUIRE STABLE, AFFORDABLE HOUSING**

We help people purchase their manufactured home communities by securing the necessary financing, and provide technical assistance to help them form resident-owned cooperatives.

**WE DEVELOP AND FUND AFFORDABLE HOUSING**

We are certified by the U.S. Treasury Department as a Community Development Financial Institution (CDFI). We secure funding for predevelopment of affordable housing, as well as construction and permanent financing.

**WE FACILITATE ECONOMIC OPPORTUNITY**

We help Oregonians become homeowners, college graduates, and business owners with Individual Development Accounts (IDAs) and programs that help young people save for college.

We are proud of our achievements and recognize there is much more to be done in order to attain racial, economic, and housing justice. Our work will continue until every Oregonian has a place to call home and the economic help they need to realize their life goals.





→ **MISSION**

*Working with community organizations and individuals, CASA builds generational wealth for those who have been underserved, specifically farmworkers and BIPOC individuals, through advocacy, asset building, organizing, and affordable housing development.*

→ **VISION**

*We envision a world where all people thrive to their fullest extent and live in stable, healthy, and resilient communities.*

→ **VALUES**

*Equity and justice are at the core of all we do and are threaded throughout these shared values, which ground and guide us in our work:*

- **CARE:** We are committed to the well-being and dignity of each other and the communities in which we live, work, and play.
- **IMPACT:** We partner with individuals and communities helping to empower others to achieve the goals they set for themselves.
- **RESPONSIBILITY:** We build trusting relationships by practicing transparent communication and mutual accountability.
- **ADAPTABILITY:** We learn, innovate, and grow to meet the ever-changing needs of our industry and the communities we work with and serve.
- **COMMUNITY-DRIVEN:** We put the community at the center of all we do by creating programs that are sustainable and informed by the needs of those we serve.

**PRIORITY 1:**

*Focus on programmatic opportunities that are clearly aligned with our Mission, Vision, Values, and equity commitments.*

- CASA creates and uses a screening tool to make decisions about programmatic opportunities to pursue.
- Existing and potential programs and projects are equity-driven and evaluated for alignment with our Mission, Vision, Values, and strategic framework.

**PRIORITY 2:**

*Standardize and make transparent internal systems, policies, and processes.*

- Internal policies and procedures are communicated clearly, are accessible, and are applied consistently across the organization.
- Develop and implement a decision-making model that is inclusive and provides clarity and direction around how we make decisions across each program and the organization as a whole.

**PRIORITY 3:**

*Ensure that our equity commitments are implemented in meaningful ways that positively nurture our organizational culture and build a sense of unity across the organization.*

- Integrate Diversity, Equity & Inclusion (DEI) expectations and goals into every job position and description.
- Continue DEI capacity building and implementation across the organization and secure funding to support ongoing equity implementation and integration.

**PRIORITY 4:**

*Innovate in areas where we are seen as leaders—affordable housing development, manufactured housing co-op development, finance, Individual Development Accounts (IDAs), community organizing, advocacy, and community leadership development.*

- CASA is strategic and intentional about its role in advocating for those we serve, including increasing funding sources for our programs and services to help maintain and increase our reach to those in need.
- CASA conducts thoughtful outreach to BIPOC communities to seek opportunities to collaborate and provide services to those communities in ways that are tangible and meaningful.

**PRIORITY 5:**

*Develop a communications plan that better tells our story and those of our communities and partners.*

- Ensure staff awareness of organizational activities and milestones by developing an internal communications program.
- Explore joint communication opportunities with our community partners.

## *Real Estate Development (RED)*

We believe that shelter is a basic necessity. We also believe that access to healthy, stable, and affordable housing and community facilities improves the quality of life for individuals and families, and provides the foundation for accessing greater opportunity for the community at large.

CASA of Oregon is recognized nationwide as an innovative and effective developer of affordable, rural and farmworker housing. CASA's Real Estate Development team partners with local community organizations to improve the stock of affordable rental housing and neighborhood community facilities throughout the state of Oregon. With our partners, we have developed affordable housing for seniors, people with disabilities, veterans, farmworkers, BIPOC individuals, other underserved individuals, and low-income families. Because we believe in a holistic approach to creating sustainable communities, we have also developed Head Start facilities, medical clinics, and community centers. We work to ensure that mission-critical construction and rehabilitation projects are aligned with our Mission, Vision, and Values—well planned, completely funded, and responsibly managed.

### GOALS INCLUDE:

- Create a list of contractors, subcontractors, and vendors that identify as women or color-owned small businesses, and ensure that at least 15% of our projects in rural areas use businesses from that list.
- Create and utilize a form/chart to identify and establish partnerships with government agencies to acquire developable land for minimal cost.
- Develop a 34-unit farmworker housing complex in Southern Oregon to house farm laborers whose housing was destroyed by the 2020 wildfires.
- In conjunction with the Manufactured Housing Cooperative Development Center Department, redevelop an 87-space mobile home park that was destroyed in the 2020 Alameda wildfires.
- Develop a 48-unit veterans project in Polk County to house underserved veterans.
- Develop a 17-unit veterans project in Umatilla County to serve veterans and houseless people in the county.
- Establish parameters for converting a multifamily housing property to resident ownership.



## *Manufactured Housing Cooperative Development Center (MHCDC)*

Houslessness and a lack of affordable housing options continue to be issues of great importance in Oregon. Compounding this problem is the fact that developers are quick to snatch up available real estate for high prices, including manufactured housing parks, putting housing out of reach of those who need it most.

Our Manufactured Housing Cooperative Development Center (MHCDC) works with residents of manufactured home communities to purchase and transform them into resident-owned cooperatives that are affordable and self-governed. Staff provide ongoing technical assistance to residents so they can govern their communities using standards and resources from ROC USA, a nonprofit social venture that aims to scale resident ownership of manufactured home communities across the United States. Increasingly, MHCDC is looking at communities that have been affected by climate change, such as Talent Mobile Estates, which was leveled during the 2020 Alameda fires and is currently being rebuilt.

### GOALS INCLUDE:

- Standardize the budget form and have all cooperatives utilize the same format, with training from staff.
- Preserve two manufactured home parks annually by converting them to resident ownership.
- Meet and discuss manufactured dwelling park turnkey projects with at least three investors annually, and execute at least one contract to convert their park to resident ownership.
- Find two new lenders willing to loan capital to newly formed cooperatives so that we can convert the park to resident ownership.
- Create a structure that allows MHCDC to use the existing ROC USA model to convert an apartment complex to resident ownership by December 2024.
- Create a feedback loop for residents and others to use to capture testimonials to be used for advocacy.



## *Family Economic Opportunity Program (FEOP)*

Income and wealth inequality affects countless Oregonians, preventing them from achieving their dreams and life goals.

Our Family Economic Opportunity Program works to level the playing field, especially among BIPOC individuals, by providing matched savings through Individual Development Accounts (IDAs). We do this through three IDA programs. First, Vida is a collaborative of nonprofit organizations, housing counseling agencies, housing authorities, and small business providers that deliver IDAs for homeownership, small businesses, education, and more. Second, our Matched College Savings Program (MCSP) engages rural high schools and community colleges to make college more affordable through education IDAs. Finally, our E3 program (Earn, Educate, Empower) offers educational IDAs for low-income and first-generation students of color attending one of seven local private universities, in partnership with the Oregon Alliance for Independent Colleges and Universities (OAICU).

### **GOALS INCLUDE:**

- Create a referral system for partners that increases access to IDAs in rural and underserved parts of the state and among BIPOC individuals.

- Revise IDA funding methodology and partner selection process to center racial and economic equity, focus on BIPOC individuals, and consider the needs of culturally specific organizations and their client interactions, staffing, and timelines.
- Begin exploring funding alternatives that reduce reliance on school-funded E3 fees and potentially allow for a doubling of the number of youth served by the E3 program.
- Enroll at least 300 new applicants for E3 annually by contracting with existing partners and renewing our relationship with Oregon Alliance of Independent Colleges and Universities.
- Increase enrollments/graduations by 10% in underserved communities annually by renewing funding in our Rural Diversity Outreach Fund, signing contracts with new partners whose focus is on underrepresented groups, and by building off our referral model with new partners.
- Increase funding for the FEOP program by 5% annually by applying for special funding through Business Oregon, Neighborhood Partnerships, major banking partners, and foundations, as well as through advocating at the legislature.





## *Community Loan Fund (CLF)*

CASA of Oregon received certification as a Community Development Financial Institution (CDFI) from the U.S. Treasury in 2000. CDFIs provide credit and financial services to underserved communities and populations, including low-income individuals and others who have difficulty accessing traditional banking services.

Originally designed to address the predevelopment funding needs of nonprofit organizations developing affordable housing and community facilities, our CDFI has since expanded to include construction, bridge, and permanent financing to eligible borrowers. Through our CLF, we provide predevelopment loans, construction loans, and manufactured housing park preservation loans.

### **GOALS INCLUDE:**

- Review and update lending policies using CASA's equity lens.
- Identify at least one potential opportunity for a new loan product that will help promote DEI in the finance industry.
- Generate five new loans per year, predicated on availability of lending capital.
- Identify at least one new funding source for the CLF each biennial.
- Analyze the CLF fee structure to ensure program sustainability and borrower affordability.
- Increase lending capital by \$5M.
- Create an updated paperless filing system for loan portfolio.



## *Finance Department and Administration*

### **GOALS INCLUDE:**

- Review and investigate—with the Finance Committee and our outside accounting firm—the need to establish designated funds on the statement of financial position to create necessary reserves.
- Implement an organization-wide decision-making model for programs and internal processes to ensure they align with our Mission, Vision, and Values.
- Create a racial justice-centered vocabulary sheet for use by CASA staff.
- Lead an organizational rebranding process.



