



Strategic Plan

2025-2027

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GROWTH AND ELEVATION



Our Story

HousingForward Virginia (HFV) began in 2003 as the Housing Virginia Campaign, launched by the Virginia Housing Development Authority in partnership with the Virginia REALTORS and the Homebuilders Association of Virginia. Its initial goal was to change public perception about affordable housing needs, focusing on essential workers.

After early experimentation with marketing campaigns, the organization shifted its focus in 2008 towards research, community education, and partnerships. This pivot marked the beginning of steady growth for Housing Virginia.

The 2010s saw significant expansion. The organization developed key resources like Sourcebook and Playbook, explored housing's connections to other sectors, and addressed rural housing needs. They also began investigating the link between housing and health.

In 2020, Housing Virginia rebranded as HousingForward Virginia, modernizing its approach and expanding its research focus. HFV's expertise became increasingly sought after, with the General Assembly commissioning major studies and regional bodies seeking their input on local housing challenges.

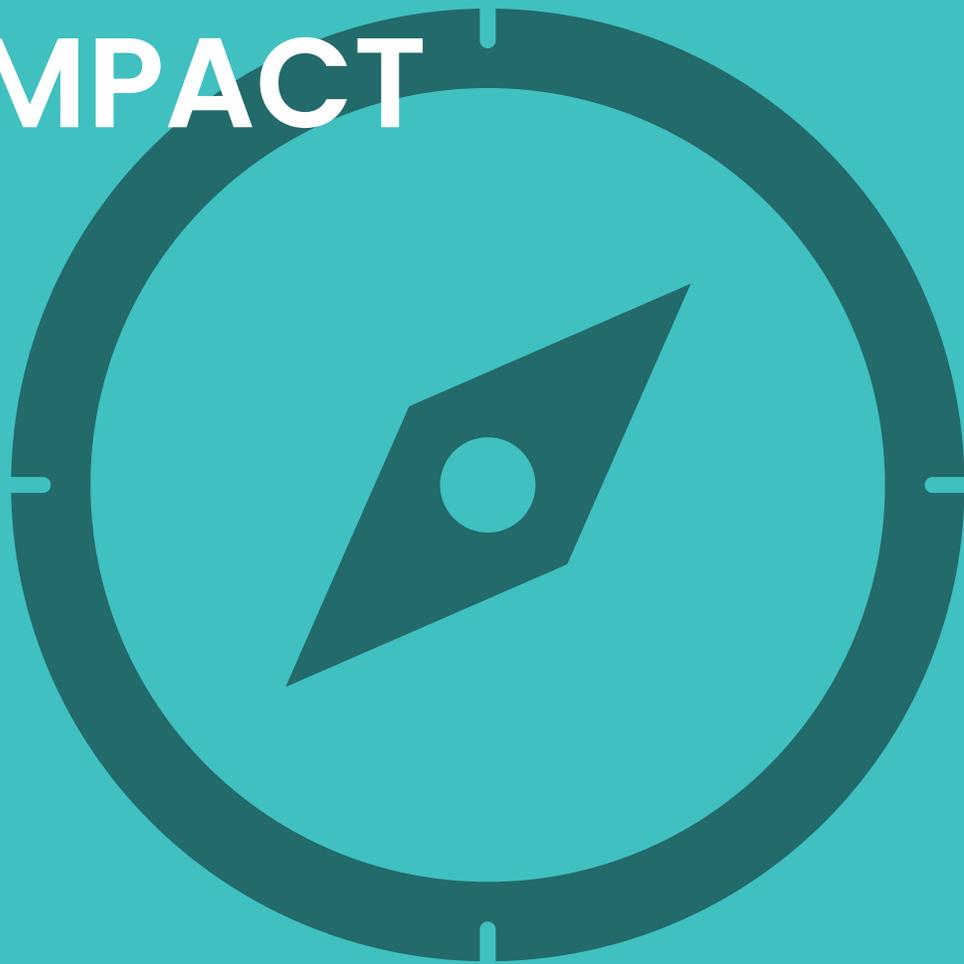
Recent years have brought further evolution. HFV adopted a co-director model, expanded its capacity, and launched initiatives like "ZONED IN" and a Racial Equity Toolkit. They've also played a key role in on-the-ground changes, such as helping create Virginia's first regional housing trust fund.

Today, HFV stands as a respected voice in housing research, policy, and advocacy. Its journey from a focused campaign to a comprehensive housing organization reflects the growing recognition of housing's central role in community well-being. As housing remains a critical issue for Virginians, HFV continues its work of informing, innovating, and advocating for inclusive housing solutions.



HousingForward
VIRGINIA

**STRATEGIC
DIRECTION
FOR
LONG-TERM
IMPACT**



Throughout its entire existence, HFV has not undergone a strategic planning process. With significant changes to the organization and the continued elevation of housing as a top issue in recent years, staff and board initiated a strategic planning process in the summer of 2024.

A strategic plan serves as a comprehensive guide for an organization's future.

It outlines the organization's vision, mission, and long-term objectives, providing a clear direction for all stakeholders. The plan helps align staff activities, guides resource allocation, and offers a framework for decision-making. It also establishes performance metrics, identifies potential risks, and allows the organization to adapt to changes in the political and economic landscape. Essentially, a strategic plan acts as a unifying tool, ensuring all parts of the organization work cohesively towards common goals while providing a means to communicate these objectives to staff, board members, funders, and its audience.

Klick Consulting was selected to lead the strategic planning process and additional consulting was provided by Partnerships for Strategic Impact.

A taskforce of HFV staff and board members was assembled to lead the strategic planning process in collaboration with Karen Klick of Klick Consulting. This included co-executive directors, Jonathan Knopf and Eric Mai, and board members, Nathalia Artus, Lisa Porter, Leslie Frazier, and Andy Kegley.

Strategic Plan Task Force



Karen Klick,
Klick Consulting

Board Chair



Nathalia Artus,
Atlantic Union Bank

Board Vice Chair



Lisa Porter,
*Bristol Redevelopment
and Housing Authority*

Board Treasurer



Leslie Frazier,
*Virginia Association of
REALTORS*

Board Member



Andy Kegley,
*Former Executive
Director of Open Door
Community*



Jonathan Knopf,
*Executive Director for
Programs*



Eric Mai,
*Executive Director for
Strategy & Sustainability*

Strategic Plan Process

The strategic planning process launched in June 2024 with the first taskforce meeting and the Board kickoff meeting. The timeline and process include a total of six taskforce meetings and monthly board engagement touchpoints, through steps of engagement and input, development and feedback, review and revision, approval and implementation. Engagement included an extensive survey of board members (current and former), staff members (current and former), clients, partners, and funders to gather input to inform key elements of the plan.

Synthesizing themes and ideas from 40 survey responses and 16 follow-up conversations, the task force analyzed HFV's unique position in Virginia's housing landscape and among peers nationwide. They also drafted and iterated mission, vision, values, goals, objectives and strategies. The board had the opportunity to provide additional feedback at an August virtual meeting, and to thoroughly discuss the preliminary plan at its September board meeting, resulting in subsequent final draft approval.

HFV is grateful to the following board members for their valuable input, insightful feedback, and diverse perspectives that contributed to shaping HFV's future direction: Nathalia Artus, Shernita Bethea, Andrew Clark, Jarrod Elwell, Tom Fitzpatrick, Leslie Frazier, Yolunda Harrell, Bryan Horn, Andy Kegley, Tammy Neale, Jill Norcross, Bryan Phipps, Austin Pittman, Vaughn Poller, Lisa Porter, Earl Reynolds, Carrie Schmidt, and Carol Wilson.

Timeline



ORGANIZATIONAL EVALUATION



Based on feedback with a diverse group of stakeholders via survey and interviews, a Strengths, Weaknesses, Opportunities, and Threats (SWOT) Analysis was conducted for the organization. The SWOT analysis identified the following high-level components:

<h2>STRENGTHS</h2> <ul style="list-style-type: none">• Expertise• Knowledgeable staff• Leadership• Communication• Relationships• Data• Policy recommendations supported by research and analysis 	<h2>WEAKNESSES</h2> <ul style="list-style-type: none">• Awareness and visibility• Staffing and capacity• Funding and financial stability• Mission, vision, and focus• Identity/structure• Engagement/connection to for-profit sector, trade groups, local governments, funders, PDCs 
<h2>OPPORTUNITIES</h2> <ul style="list-style-type: none">• Research, data, and policy analysis• Partnerships and collaboration• Technical assistance and capacity building• Advocacy and policy change• Funding and resource development• Communication, awareness, and relationships• Evaluation and impact assessment• Geographic assessment 	<h2>THREATS</h2> <ul style="list-style-type: none">• Funding and financial sustainability• Political landscape and public awareness• Competition• Role confusion• Internal challenges 

Based on the analysis, HFV staff found it important to create action items based on the SWOT analysis findings. Below is an operationalization of the SWOT analysis:



HFV should PURSUE...

- Clarifying its identity, focus, and role in ecosystem
- Evaluating how its structure supports or hinders its current/future work
- Finding how to best measure and advertise its impact
- Expanding its capability to drive policy changes
- Diverse and sustainable streams of revenue



HFV should EXPAND...

- Opportunities to increase its profile
- New partnerships and collaborations
- Education and trainings for its audience



HFV should CONTINUE...

- Maintaining and building staff expertise
- Providing high-quality data, research, and policy analysis
- Supporting practitioners via technical assistance



HFV should AVOID...

- Becoming too reliant on particular funding sources

Competitive Advantage

Survey and interview participants were asked to describe HFV's competitive advantage among peer organizations across the state. Based on feedback from participants, consultants identified the following advantages among HFV:

- Data-driven approach
- Expertise and knowledge
- Relationships and partnerships
- Objectivity and neutrality
- Impact and influence
- Innovation
- Diversity and inclusion

In addition, it was noted that the competitive advantage could be dependent on the presence of organizations with stronger policy and research arms. For example, the Partnership for Housing Affordability (PHA) serves as a major source of policy research and convener in the Richmond region. Therefore, in the Richmond region, PHA may have a competitive advantage over HFV in the Richmond region in some circumstances. And for these reasons, when working in the Richmond region, HFV would work in collaboration with PHA rather than as a lead organizer.

Similarly in the Northern Virginia region, the Northern Virginia Affordable Housing Alliance (NVAHA) is the main affordable housing policy and advocacy organization. As a regular convener and well-established voice for affordable housing in Northern Virginia, NVAHA would also have a competitive edge over HFV in that geographic area.

The graphic below seeks to showcase organizations and institutions in Virginia that do similar work (i.e., policy research, technical assistance, and stakeholder convening) as HFV. Based on a double-axis scale from public sector to independent organization and research-focused to advocacy-focused, HFV serves in a less populated sector of independent, research-focused organizations. The organization’s non-partisan, data-driven work clearly sets it apart from its peers.

Figure 1) Virginia housing research and policy landscape



PRIORITIES

The results of the stakeholder survey, SWOT analysis and the peer landscape review helped to develop high priority areas to be addressed by the strategic plan process.



Policy and Advocacy

- **Policy development:** HFV should increase its focus on policy advising that results in increased housing production, particularly around zoning and regulatory barriers.
- **Advocacy:** HFV should determine how best to expand its role in advocacy and policy work.
- **Policy research:** HFV's current policy research is a major strength worth developing further.
- **Equity:** Equitable access to housing opportunities should remain a major priority of the organization.



Data and Research

- **Data collection and analysis:** Utilizing data to inform decision-making and identifying areas of need should remain a key component of HFV's work.
- **Research:** HFV should expand its research capacity with a focus on new and innovative housing trends and policies.
- **Data-driven decision-making:** HFV should leverage data-driven decision-making to support the development and preservation of affordable housing.



Outreach & Brand Recognition

- **Communication:** HFV should improve its communication with stakeholders and the public to increase knowledge and generate new discussion.
- **Technical assistance:** HFV should leverage its policy and research skills to support practitioners throughout Virginia.
- **Identity and role:** HFV should improve its brand to better reflect what we do, what sets us apart, and why our mission is necessary.
- **Partnership building:** HFV should prioritize building new relationships with key stakeholders and partners within and outside of housing.



Organizational Capacity & Sustainability

- **Organizational structure:** HFV should assess its current organizational structure for efficiency and effectiveness.
- **Staffing and capacity:** HFV should build additional capacity to ensure the organization has the necessary resources to achieve its goals.
- **Organizational goals:** HFV should set clear and measurable goals to gauge success.
- **Funding:** HFV should assess its current funding sources and identify potential new sources.
- **Financial sustainability:** HFV should identify a sustainable funding model to ensure long-term financial health.
- **Revenue generation:** HFV should investigate new avenues of revenue generation.

ADVANCING HOUSING IN VIRGINIA & BEYOND

In collaboration with the board, the HFV Strategic Plan Task Force developed revised vision, mission, and values statements. These revised statements led the task force through the development of four strategic goals with specific objectives and strategies for each.



OUR VISION

HousingForward Virginia is a national leader for advancing successful, data-driven housing solutions in Virginia and beyond.

OUR MISSION

HousingForward Virginia helps community leaders take action to solve their housing challenges. As a trusted partner and innovator, we use evidence-based solutions to build a future where everyone has a safe, stable home they can afford.

OUR VALUES

What we do

Data-Driven Innovation

We are committed to producing high-quality, accurate, and comprehensive research and analysis that leverages rigorous data practices and creative thinking.

Our findings generate actionable insights and sustainable solutions for Virginia's housing challenges.

How we do it

Integrity in Practice

We are Virginia's honest broker in housing policy.

We support our partners by sharing clear information, democratizing data, and fostering the trust necessary to achieve lasting change.

Why we do it

Inclusive Equity

We champion equitable access to affordable housing as a fundamental right.

We strive to promote inclusive practices and empower diverse communities across the Commonwealth.

STRATEGIC GOALS

How these goals were developed:

- Preliminary input and guidance from board members
- Survey and interview responses from stakeholders
- Iterative feedback and improvements from the Task Force
- Final consent and approval from all board members

Goal objectives and strategies organized into three phases:

- Starting Point – Foundational steps that set up success
- Next Moves – New activities to strengthen our position
- Lasting Changes – Transformative initiatives to realize our vision

Strategic Goal 1

Generate original research that simplifies complex issues and promotes evidence-based policymaking.

Strategic Goal 2

Strengthen our ability to drive widespread adoption of proven solutions and innovative approaches.

Strategic Goal 3

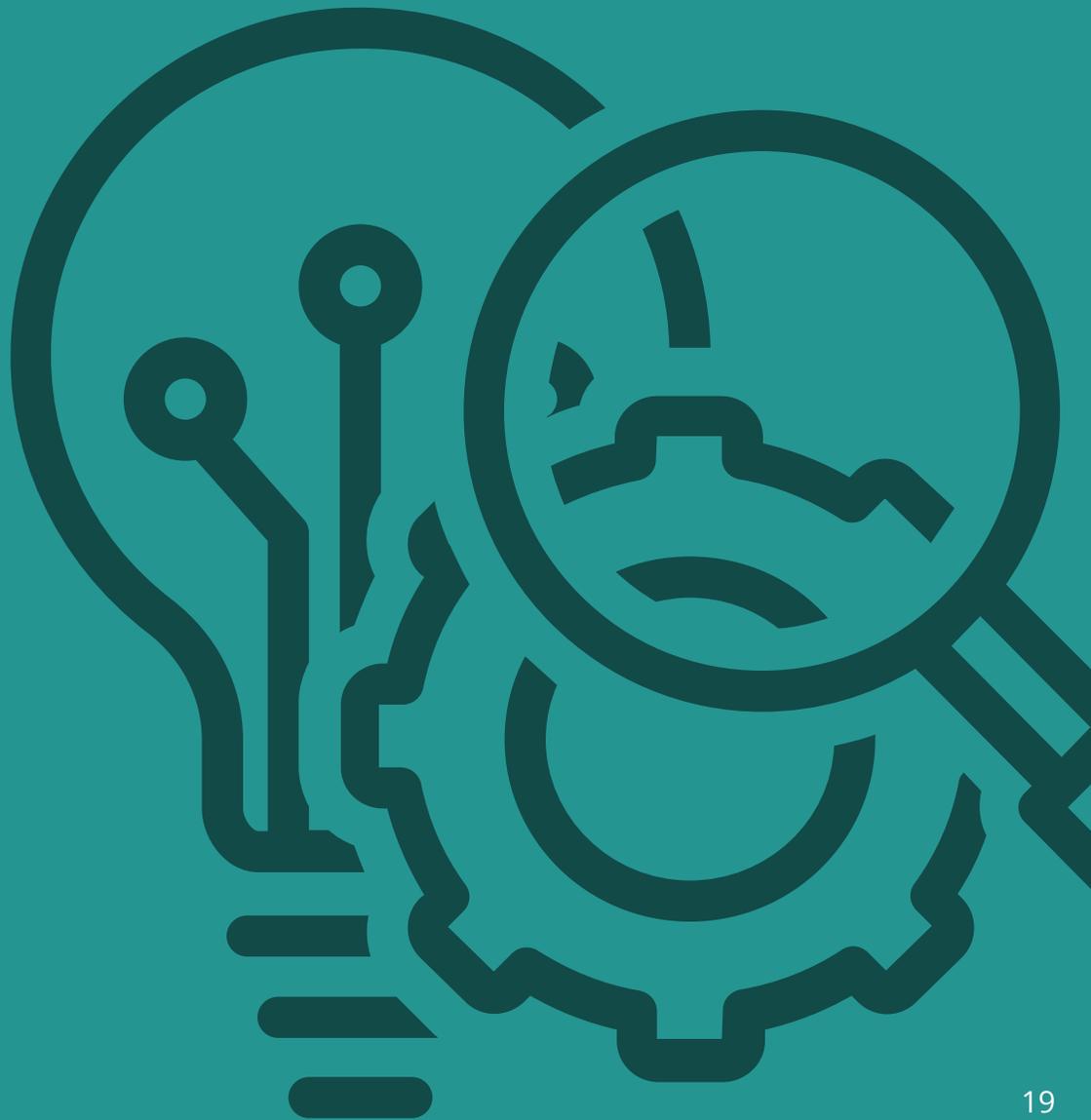
Expand and solidify our values-based partnerships and outreach activities.

Strategic Goal 4

Fortify our capacity to succeed through constructive governance, sustainable funding models, and effective operations.

STRATEGIC GOAL 1

Generate original research that simplifies complex issues and promotes evidence-based policymaking.



STARTING POINT

OBJECTIVE 1.1:

Develop a research agenda to identify and prioritize market and policy trends in Virginia that deserve fresh investigations.

Strategy 1.1.1:

Begin to regularly survey partners and peers across sectors to determine major housing research questions yet to be answered in Virginia.

Strategy 1.1.2:

Establish regular engagement with national housing organizations to stay informed about new housing trends, best practices, and policies.

Strategy 1.1.3:

Conduct a scan of existing tools and resources used to highlight the intersection of housing and other issues in other states.



KPI

At least one identified research question or priority issue investigated by HousingForward Virginia each year.

2027 Target
At least three

OBJECTIVE 1.2:

Continue to build-out of core data and policy website resources.

Strategy 1.2.1:

Add functionality to Sourcebook for user-generated fact sheets and similar “grab and go” content.

Strategy 1.2.2:

Publish and promote new Playbook for local accessory dwelling unit policies.

Strategy 1.2.3:

Identify next Playbook policy area and draft development plan.



KPI

Increase in utilization and user satisfaction of resources.

2027 Target
Positive YOY growth

→ NEXT MOVES

OBJECTIVE 1.3:

Create new original research reports on a particular policy area or data trend focused on policy barriers and solutions.

Strategy 1.3.1:

Evaluate potential to align research with Playbook development cycles

Strategy 1.3.2:

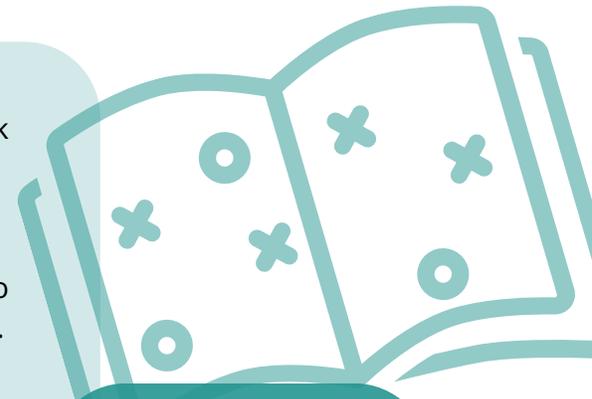
Recruit relevant subject-matter experts and advocates to help robust distribution and promotion plans for each study.

Strategy 1.3.3:

Streamline and automate methods for basic housing needs assessments to create additional staff capacity.

Strategy 1.3.4:

Explore opportunities for staff to increase knowledge on relevant research methodologies and emerging research issues.



KPI

Annual HousingForward Virginia research referenced or cited by at least one media outlet, advocacy group, or other.

2027 Target

At least three

OBJECTIVE 1.4:

Facilitate collaboration and resource sharing among housing researchers in Virginia.

Strategy 1.4.1:

Establish a community of practice for public sector, nonprofit, and university researchers.

Strategy 1.4.2:

Create a centralized web resource to publish open source research methods, code, data, and related content.

Strategy 1.4.3:

Pursue formal cooperative agreements with academic institutions to expand research capacity.



KPI

Partner with at least one new organization annually.

2027 Target

At least three



LASTING CHANGE

OBJECTIVE 1.5:

Pursue innovative research on intersections between housing and other issue areas.

Strategy 1.5.1:

Develop new tools and resources not yet existing in Virginia to demonstrate housing's influence on economic development, municipal finance, public education, and other important issues.

Strategy 1.5.2:

Provide technical assistance to partners utilizing these tools and resources for specific solutions.

KPI

Engage with one non-housing partner on the development of a tool or resource each year.

2027 Target

At least three



OBJECTIVE 1.6:

Lead or participate in research projects beyond Virginia.

Strategy 1.6.1:

Explore opportunities in adjacent states.

Strategy 1.6.2:

Collaborate on national-level research efforts with national partners and/or organizations from other states.

KPI

At least one tool or resource is applicable to national-level housing issues.

2027 Target

At least three



STRATEGIC GOAL 2

Strengthen our ability to drive widespread adoption of proven solutions and innovative approaches.



📍 STARTING POINT

OBJECTIVE 2.1:

Strengthen relationships with advocacy and special interest groups in need of data and other evidence-based research.

Strategy 2.1.1:

Identify current and potential partner groups and collaborate on plans to provide or connect to needed data and research.

Strategy 2.1.2:

Continue to develop focused policy recommendations—such as those around zoning, regulatory barriers, financing, and equity—that result in increased housing production and more equitable housing opportunities.



KPI

At least one new advocacy or special interest group engaged with annually.

2027 Target

At least three

OBJECTIVE 2.2:

Establish protocols to define specific ways we generate and promote policy change at the local, regional, and state levels.

Strategy 2.2.1:

Create a policy engagement framework to define what advocacy activities the organization will and will not participate in.

KPI

Policy engagement protocols created.

2027 Target

Protocols adopted



→ NEXT MOVES

OBJECTIVE 2.3:

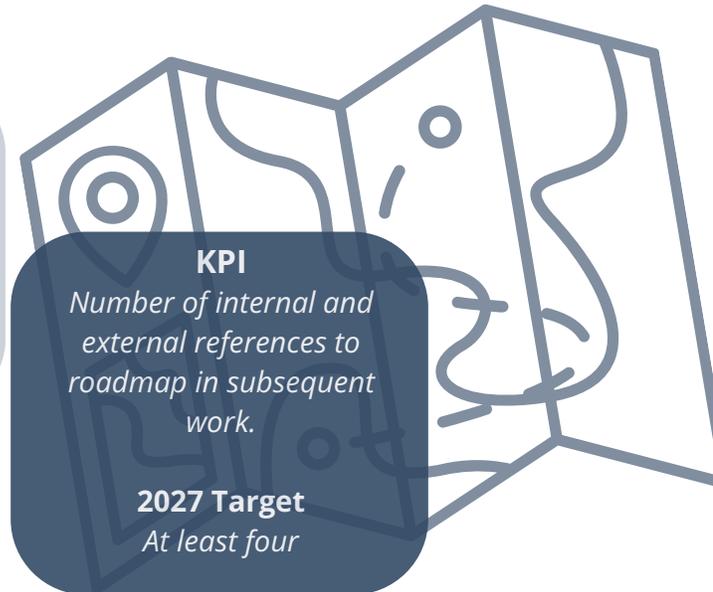
Create, maintain, and promote a new “housing policy roadmap” for both state and local levels.

Strategy 2.3.1:

Develop a state housing policy roadmap.

Strategy 2.3.2:

Develop a local housing policy roadmap based on market type (e.g., rural, urban, etc.)

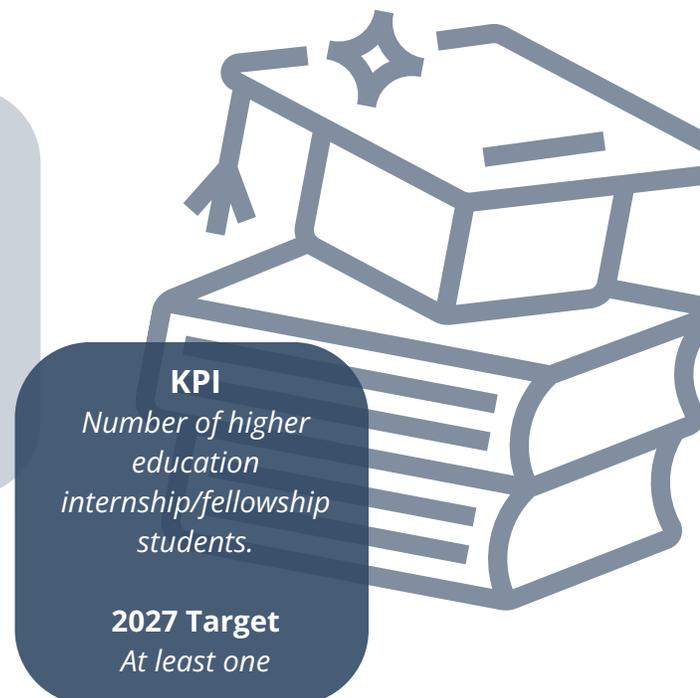


OBJECTIVE 2.4:

Build relationships with universities and other higher education institutions to develop Virginia’s next generation of housing policy experts.

Strategy 2.4.1:

Develop a proposal for university internship or fellowship program to provide students a comprehensive education on and practical experience with affordable housing policy; include strategy for connecting with HBCUs and connecting with VHA’s BIPOC Leadership Institute.





LASTING CHANGE

OBJECTIVE 2.5:

Serve as a premier source to inform and influence statewide housing policy conversations.

Strategy 2.5.1:

Secure stronger advisory role within Virginia Housing Commission.

Strategy 2.5.2:

Increase public media presence through op-ed columns, interviews, and story pitches.

KPI

Number of elected officials engaged with annually.

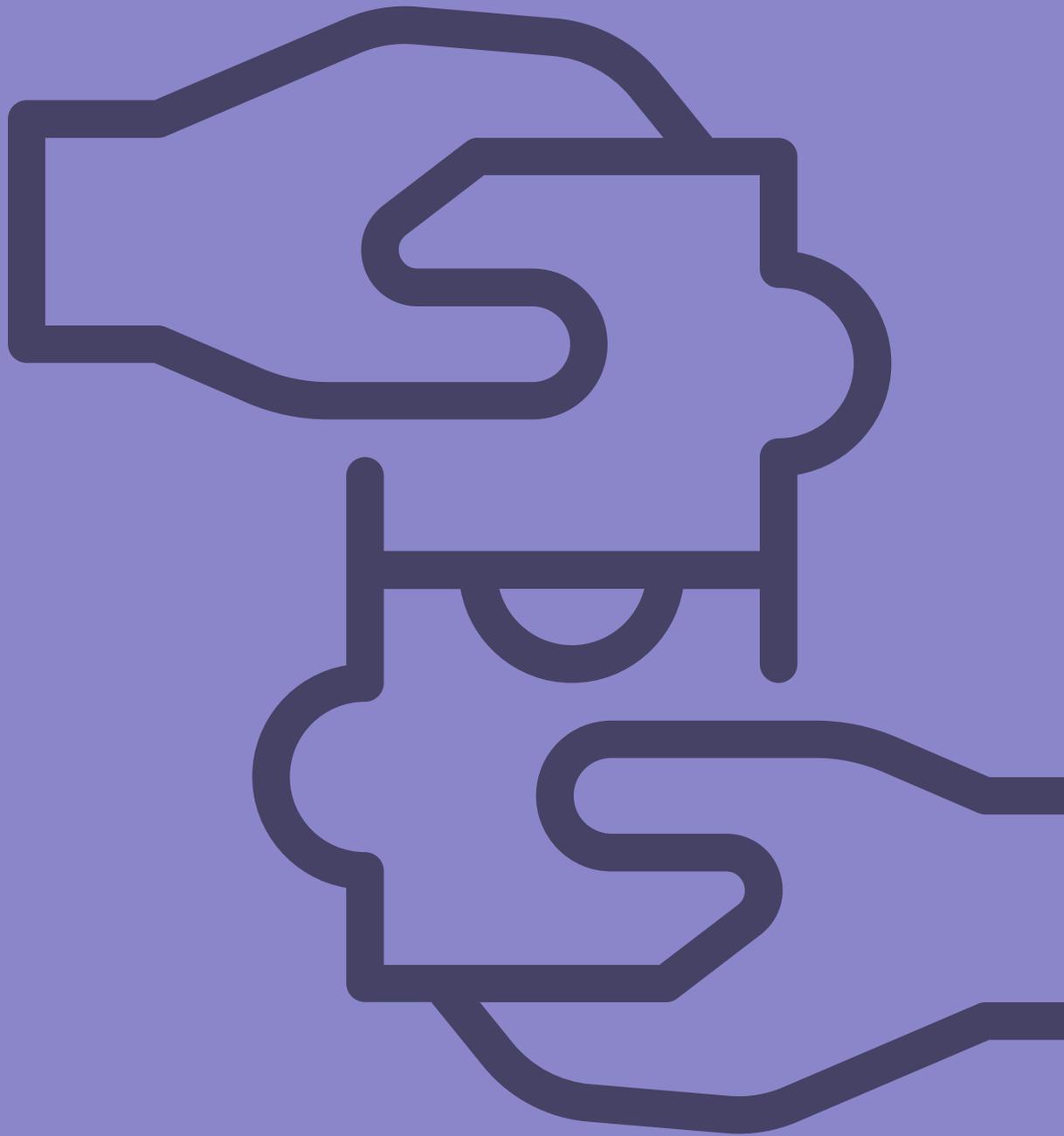
2027 Target

Annual increases



STRATEGIC GOAL 3

Expand and solidify our values-based partnerships and outreach activities.



📍 STARTING POINT

OBJECTIVE 3.1:

Evaluate current engagement strategies with our partners, clients, and broader audience.

Strategy 3.1.1:

Map partnerships, audiences, and outreach to strategic goals, and identify where new or deeper connections are needed, along with relationship management plan.

Strategy 3.1.2:

Clarify identity and solidify role/brand to reflect what we do, what sets us apart, what our impact is, and why our mission is necessary.

KPI

Current engagement strategies evaluated and refined engagement strategies adopted.

2027 Target

Strategies evaluated

OBJECTIVE 3.2:

Formalize and advertise speaking engagement services.

Strategy 3.2.1:

Maintain a formal body of speaking engagement content on regularly requested topics and issues in housing.

KPI

At least five formalized public speaking engagements annually.

2027 Target

At least 15

→ NEXT MOVES

OBJECTIVE 3.3:

Develop an innovative outreach plan to promote our services and develop new connections.

Strategy 3.3.1:

Evaluate opportunities to engage with marketing expertise to develop an innovative outreach plan.

Strategy 3.3.2:

Improve communication with stakeholders and the public to amplify existing resources, increase knowledge, and generate new discussions.

Strategy 3.3.3:

Expand education and training.

Strategy 3.3.4:

Leverage policy expertise and research skill technical assistance to directly support the work of local officials, developers, providers, and advocates.

KPI

Number of new connections established under innovative outreach plan annually.

2027 Target

Annual increases

OBJECTIVE 3.4:

Conduct proactive outreach with rural areas and other lower-capacity communities.

Strategy 3.4.1:

Engage with Planning District Commissions (PDCs) to identify areas in need of support with housing issues.

KPI

Number of rural areas and lower-capacity communities served annually.

2027 Target

Annual increases



LASTING CHANGE

OBJECTIVE 3.5:

Establish a forum for cross-sector impact on housing issues in Virginia.

Strategy 3.5.1:

Redevelop HousingX into an accessible forum for exchange of innovative and actionable best practices with opportunities for peer networking, regional cooperation, and cross-sector engagement.

KPI

Number of non-housing organizations engaged annually.

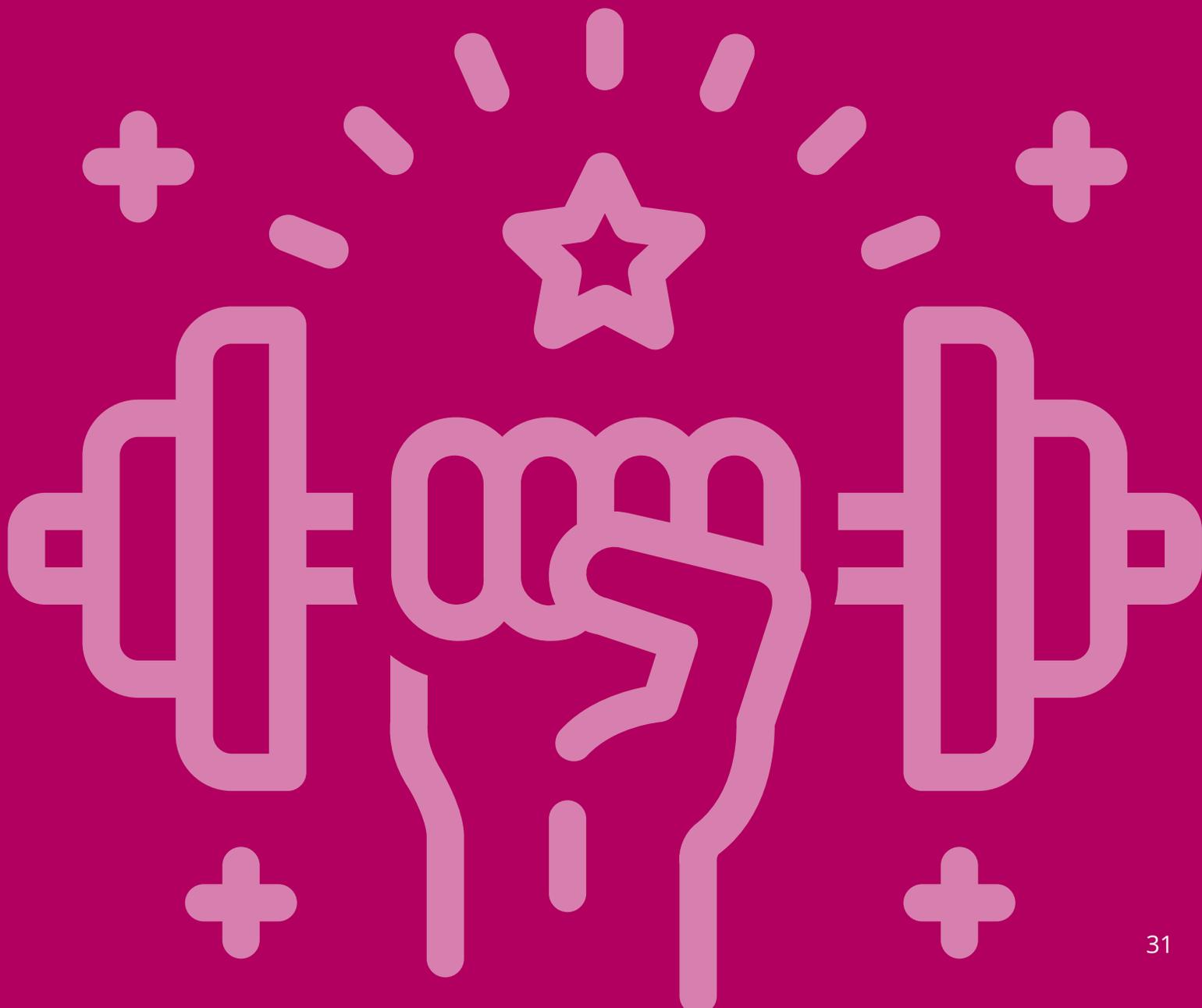
2027 Target

Annual increases



STRATEGIC GOAL 4

Fortify our capacity to succeed through constructive governance, sustainable funding models, and effective operations.



📍 STARTING POINT

OBJECTIVE 4.1:

Maximize board effectiveness and position it to implement the strategic plan.

Strategy 4.1.1:

Clarify board roles and responsibilities, to include board engagement commitments, one-on-one meetings, and fund development.

Strategy 4.1.2:

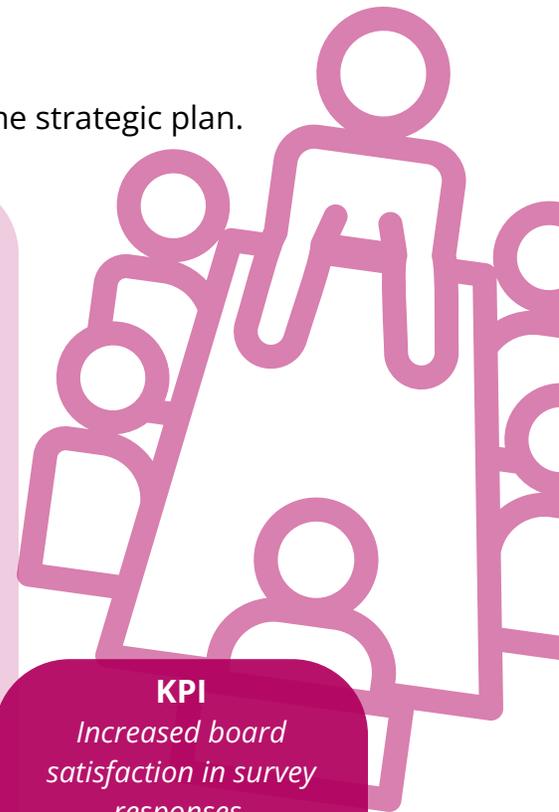
Assess and implement opportunities for board members to engage with each other—both during and outside of regular board activities.

Strategy 4.1.3:

Re-envision and clarify board committee charges and invite non-board members.

Strategy 4.1.4:

Incorporate plan progress updates and KPIs into board meeting materials.



KPI

Increased board satisfaction in survey responses.

2027 Target

Positive YOY growth

OBJECTIVE 4.2:

Determine the additional capacity and necessary resources to achieve strategic goals.

Strategy 4.2.1:

Update Strategic Impact Map and integrate it into work plan.

Strategy 4.2.2:

Convene Governance Committee to begin the process for evaluating organizational structure and staffing models.

Strategy 4.2.3:

Use Strategic Plan Financial Assessment to conduct a comprehensive evaluation of current staff capacity and funding allocations to identify resource gaps and funding opportunities.



KPI

HousingForward Virginia Organizational Structure evaluation completed.

2027 Target

Evaluation complete

→ NEXT MOVES

OBJECTIVE 4.3:

Diversify and grow revenue to ensure sustainable funding model and long-term financial health.

Strategy 4.3.1:

Develop a compelling case for support and develop a resource development plan.

Strategy 4.3.2:

Evaluate technical assistance and research opportunities beyond Virginia for additional revenue.

Strategy 4.3.3:

Convene network of mission-aligned funders to engage in learning, information-sharing, identification and funding of priority needs and gaps in research, data, and policy, especially in partnership with rural and underrepresented communities.

Strategy 4.3.4:

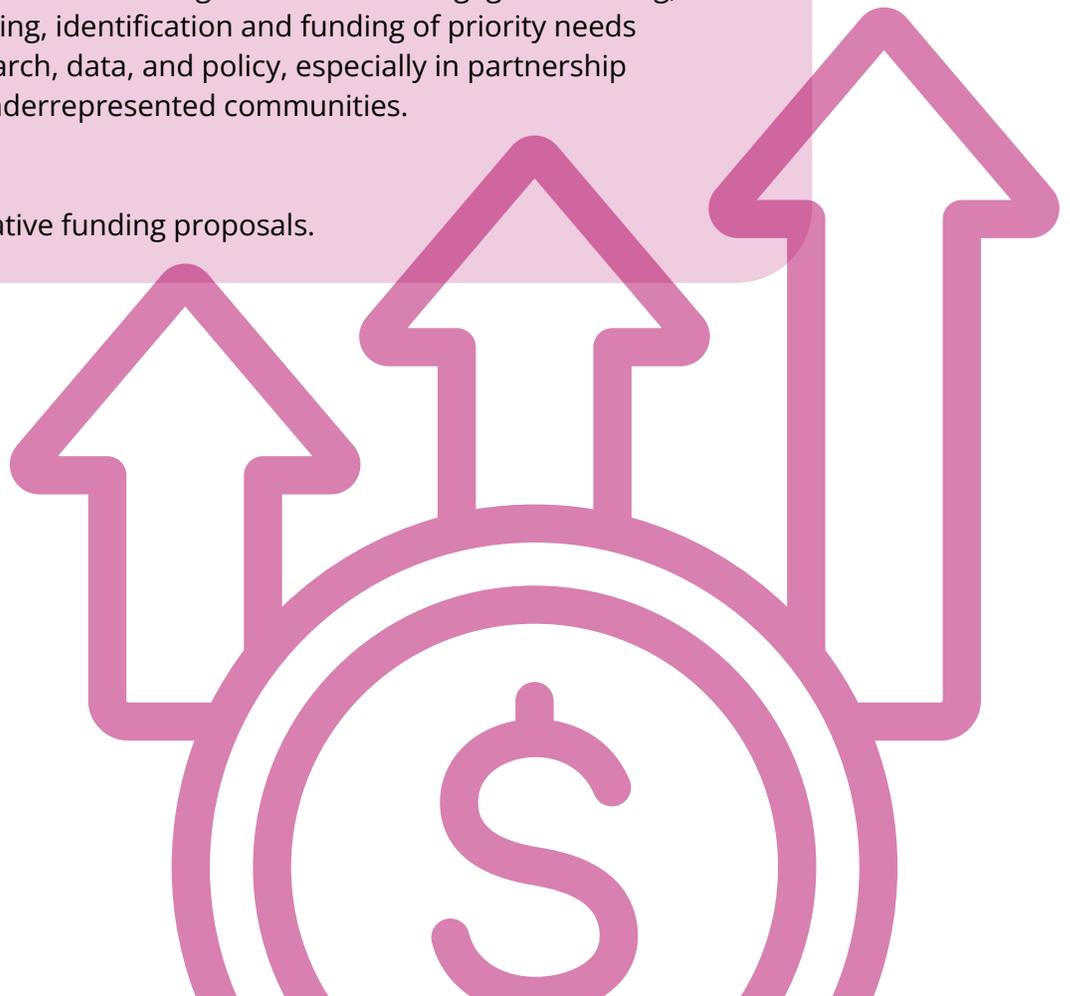
Explore collaborative funding proposals.

KPI

Number and dollar amount of increased and new revenue sources (grant and contract work).

2027 Target

Positive YOY growth





LASTING CHANGE

OBJECTIVE 4.4:

Optimize organizational structure for efficiency and effectiveness.

Strategy 4.4.1:

Present long-term structure options to board and provide a decision framework to evaluate choices.

Strategy 4.4.2:

Pursue and implement any organizational changes recommended by the board.

KPI

Recommendations from Organizational Structure evaluation adopted by board.

2027 Target

Recommendations adopted

