

**HASLO (HOUSING AUTHORITY OF SAN LUIS OBISPO) AGENDA OF OCTOBER 26, 2023**

**HASLO has returned to in-person meetings for the Board of Commissioners.**

**LOCATION:** Farm Bureau, 4875 Morabito Place, San Luis Obispo, CA 93401

**The public may join in person or via the Zoom link.**

Join Zoom Meeting:

<https://us06web.zoom.us/j/98057177103?pwd=TXljeW5UMVMYTS8rcS81Y0hiUjNOUT09>

Meeting ID: 980 5717 7103

Passcode: 975423

Dial by phone: (253) 215-8782

**12:00 P.M.**

**SPECIAL MEETING**

**4875 Morabito Place, SLO**

**CALL TO ORDER:** Chairman Ashlea Boyer

**ROLL CALL:** Commissioners Boyer, Crotser, Jeffries, Odenthal, Shower, Souza, Steinberg

**PUBLIC COMMENT PERIOD FOR ITEMS NOT ON THE AGENDA** (not to exceed 15 minutes total)

The Board welcomes your input. You may address the Board by completing a speaker slip and giving it to the staff clerk prior to the meeting. At this time, you may address the Board on items that are not on the agenda. Time limit is three minutes. State law does not allow the Board to discuss or take action on issues not on the agenda, except that members of the Board or staff may briefly respond to statements made or questions posed by persons exercising their public testimony rights (Gov. Code Sec. 54954.2). Staff may be asked to follow up on such items.

**DISCUSSION ITEM:**

**KOBLE COLLABORATIVE STRATEGIC SESSION**

HASLO is working with Koble Collaborative in a multi-year strategic planning process. The focus for year one (2023) is to create a more unified and stronger organization. In this session, the Board and HASLO leadership staff will discuss what the optimal organization would like in the future, the obstacles in the way, and strategies and innovations to achieve the optimal future.

**ADJOURNMENT**

The next Regular Meeting will be held on November 16, 2023, at 12:00 p.m.

**REQUIREMENTS OF THE BROWN ACT HAVE BEEN SATISFIED AS THIS NOTICE WAS POSTED AT 2:00 P.M. ON OCTOBER 20, 2023, PRIOR TO THE 24-HOUR NOTICING REQUIREMENT FOR SPECIAL MEETINGS.**



## Staff Report Content for Visioning Session

from Koble Collaborative, Inc.

HASLO contracted with Koble Collaborative Inc. (KCI) to lead HASLO's near-term strategic planning process. This allows HASLO to strengthen and unify the internal team by building a foundation of collaboration, honest conversation, and focused decisions about what the internal organization needs over the first year of the strategic planning process. A strengthened internal organization will then allow HASLO to turn its attention in 2024 towards defining a long-term strategic plan for what HASLO's success looks like in 2028 and beyond.

Already over halfway complete with year one of the process, KCI is leading this multi-step process as briefly outlined in Table 1 below for context. The Board's special meeting on October 26th will be the Visioning Session step of the process. See **attached Shared Expectations** and **attached Visioning Session Agenda** which provides an intentional process to walk the HASLO Board and Leadership Team through exercises to answer the following three questions:

### 1. Vision of the future

- It's 2028 and HASLO has just been named the best employer in California. What specific aspects of your organization will earn you the title of Statewide Best Employer (think about specific staff opportunities, team dynamics, employee programs, organizational culture)?

### 2. Obstacles to vision

- What is currently blocking or could block the organization from attaining this vision?

### 3. Strategies and actions to achieve vision

- What innovative or substantial actions, employee programs, or improvements can be made to overcome obstacles and achieve vision of success?

For those not able to attend, input on the three primary questions can be provided to KCI team: Carolyn Berg ([cberg@koblecollaborative.com](mailto:cberg@koblecollaborative.com)) and Annie Chung ([achung@koblecollaborative.com](mailto:achung@koblecollaborative.com)). For all who will attend, no need to submit any responses in advance.

**Table 1. Strategic Planning Project Status Update**

Task	Status	Notes
1A. All Staff Survey	Completed	The HASLO All-Staff Survey was created with collaborative input from HASLO's Executive Team, and subsequently administered by KCI from 8/7 until 8/18. Of the 80 employees who received the survey, 70 responded for an overall response rate of 87.5%. The <b>attached Presentation Slidedeck (slides 5-11)</b> highlights staff input on top positive aspects of the organization, areas for improvement, as well as ideal work environment.

<b>1B. Pre-Session Meetings</b>	<b>Completed</b>	KCI and HASLO collaboratively completed all seven team meetings, gathering rich insight and ideas from the following teams: HASLO Board (8/17); Finance and Development (8/17); Resident Services and Executive (8/24); Section 8 (8/30); Property Management (8/30); Supportive Housing/Support Services (8/30); and Maintenance (9/18). The <b>attached Presentation Slidedeck (slides 12-17)</b> highlights staff input on HASLO’s strengths, weaknesses and ideas about future actions or changes that could benefit the internal team dynamics, staff and organization ability to carry out its mission effectively.
<b>Task 2 Strategic Planning Sessions: Session 1: SWOT Analysis</b>	<b>Completed</b>	On 10/4, KCI facilitated the SWOT (Strengths, Weaknesses, Opportunities, Threats) process. HASLO Leadership Team considered input from the 2023 All-Staff Survey results and input gathered from staff during each pre-session meeting before identifying priority SWOT areas shown in <b>attached SWOT Summary Handout</b> . This analysis serves as a foundation for strategic planning—as HASLO considers its future vision as an organization/employer and what will be needed to accomplish that.
<b>Task 2 Strategic Planning Session 2: Visioning</b>	<b>Scheduled for 10/26</b>	As described above; scheduled as a special Board meeting on 10/26.
<b>Task 2 Strategic Planning Session 3: Prioritizing Actions</b>	<b>To be scheduled (Nov.)</b>	KCI continues to coordinate with HASLO to confirm the session date. KCI will facilitate a half day, in-person session with focused attendees that builds on findings from both the SWOT and visioning sessions. This session would focus on identifying critical priorities for Year 1 (2024) action as well as refining strategic framing of goals and strategies.
<b>Task 3. Implementation Path Session 4: Year 1 Implementation</b>	<b>To be scheduled (Nov.)</b>	KCI continues to coordinate with HASLO to confirm the session date. KCI will facilitate a half day, in-person session with focused attendees that identifies how and who will implement each priority, establishes measures of success, and discusses organizational effectiveness needed to implement priorities successfully.

**Attachments:**            Shared Expectations  
                                   Visioning Session Agenda  
                                   Presentation Slidedeck  
                                   SWOT Summary Handout

## Shared Expectations for HASLO Visioning Session

Please keep these simple and important expectations in mind during the session:

**Come with an open mind and a commitment to engage honestly.**

**Be fully present. Step out of the space only if absolutely necessary. We strongly encourage all cell phones be put away until scheduled breaks.**

**Be focused and engaged in each exercise. Help each other stay on topic.**

**Accept all viewpoints and ideas as having equal value. Respect your teammates by listening and trusting that their perspective also brings value to this process.**

**If you don't understand something, ask.**

**If you disagree with something, respectfully share aloud a differing viewpoint so both can exist.**

**Avoid the weeds and "agreement detours."**

**Think creatively and be open to integrating ideas.**

**Actively listen and share the airtime.**

This is a significant step in this journey, but there are more steps and opportunities to come!

# HASLO Visioning Session Meeting Agenda

Thursday October 26th, 9:00 AM - 2:30 PM

Farm Bureau (4875 Morabito Place, San Luis Obispo, CA 93401)

Start Time	Duration	Topic	Lead
9:00 AM	10 min	<b>Welcome HASLO Team</b>	Ashlea, Scott
9:10 AM	10 min	<b>Overview session structure</b>	Carolyn
9:20 AM	20 min	<b>Paired introductions</b>	Participants
9:40 AM	20 min	<b>Presentation: All-Staff Survey and Teams' Input</b>	Annie
10:00 AM	15 min	<b>Presentation: SWOT Session Findings</b>	Scott
10:15 AM	10 min	Break	
10:25 AM	60 min	<b>Vision of the future</b> <i>Question: It's 2028 and HASLO has just been named the best employer in California. What specific aspects of your organization will earn you the title of Statewide Best Employer (think about specific staff opportunities, team dynamics, employee programs, organizational culture)?</i>	Participants
11:25 AM	15 min	Break	
11:40 AM	55 min	<b>Obstacles to vision</b> <i>Question: What is currently blocking or could block the organization from attaining this vision?</i>	Participants
12:35 PM	45 min	Lunch gathering of HASLO team	
1:20 PM	60 min	<b>Strategies &amp; actions to achieve vision</b> <i>Question: What innovative or substantial actions, employee programs, or improvements can be made to overcome obstacles and achieve vision of success?</i>	Participants
2:20 PM	5 min	<b>Summary &amp; next steps</b>	Carolyn
2:25 PM	5 min	<b>Closing remarks</b>	Scott

# Summary of HASLO’s 2023 SWOT Analysis: Top 5 Priority SWOT Areas

*SWOT session conducted on 10/4/2023  
Participants included HASLO’s Leadership Team*

“SWOT” analysis refers to the process of documenting HASLO’s current internal Strengths and internal Weaknesses as it relates to the organization’s capacity to complete its mission, staff’s ability to do their jobs well, and overall team dynamics. The SWOT analysis also refers to the process of identifying externalities that might pose as either an Opportunity or a Threat to HASLO’s ability to complete its mission, support its staff and function well.

During the session brainstorming, the HASLO Leadership Team considered input from the 2023 All Staff Survey results and input gathered from staff during each pre-session meeting. While the participants developed longer lists for each category below, the following table includes top five priorities for each category as identified by HASLO’s Leadership Team during the session.

This analysis serves as a foundation for strategic planning—as HASLO considers its future vision as an organization/employer and what will be needed to accomplish that.

<p><b><u>Top Strengths</u></b></p> <ol style="list-style-type: none"> <li>1. Forward-thinking/innovative; Leadership; Vision</li> <li>2. Compassion; Trust/care for staff</li> <li>3. Open door policy; Openness; Accessibility</li> <li>4. Making investments in staff/other areas; Team support</li> <li>5. Dedicated staff; Committed to our purpose; Meaning and compassion</li> </ol>	<p><b><u>Top Weaknesses</u></b></p> <ol style="list-style-type: none"> <li>1. Lack of work-life balance; Burnout; Overwhelm; Inability to take time off; Lack of workload/caseload balance</li> <li>2. Limited collaboration; Limited inter-department collaboration and dynamics</li> <li>3. Lack of communication across organization and team building; trickle down communications</li> <li>4. Need policies and procedures</li> <li>5. Turnover/retention</li> </ol>
<p><b><u>Top Opportunities</u></b></p> <ol style="list-style-type: none"> <li>1. Market rate housing for employees; Workforce housing</li> <li>2. Partnerships (nonprofits, governments); Strengthen outside collaborations with vendors (client support)</li> <li>3. Grant writer; Pursue philanthropic funding</li> <li>4. Internships, Federal work study programs and/or next generation staffing; Cuesta, Cal Poly; Eckerd for unemployed clients</li> <li>5. Cross-collaboration with partner agencies for training opportunities</li> </ol>	<p><b><u>Top Threats</u></b></p> <ol style="list-style-type: none"> <li>1. Generations’ perception of work day, work ethics, etc.); cultural shift; pandemic; remote openness; working from home only</li> <li>2. Inflation; cost of living</li> <li>3. Compliance changes; HUD regulations</li> <li>4. Government shutdowns; Federal/State/County funding</li> <li>5. Expectations of HASLO; Community perceptions and support</li> </ol>

# HASLO Visioning Session

October 26, 2023



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## Agenda

**Welcome, Introductions & Presentation**

**Vision of the Future**

**Obstacles to Vision**

**Lunch gathering**

**Strategies & Actions to Achieve Vision**

**Summary & Closing**

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# Shared Expectations

Keep an **open mind** and engage **honestly**. Think creatively.

Be **fully present**. Put phones away and step away only if absolutely necessary.

Be **focused** and **engaged**. Help others stay on topic.

Be **respectful**. Actively **listen** to others and share the airtime.

**Value all views**, experiences, and perspectives.

If you don't understand something, **ask**.

If you disagree with something, **respectfully share aloud** a differing viewpoint so both exist.

Operate as a **representative of your team and all HASLO staff**, not just yourself as a leader.

**Avoid the weeds** and "agreement detours."

## Team Meetings

**8/17 - 9/18:**  
**Teams** provide  
initial input

## Visioning Session

**10/26:**  
**Leadership** and  
**Board** define  
vision

## Implementation Path

**November:**  
**Leadership** identifies  
how to implement  
priorities



**Late 2023:**  
**HASLO begins  
implementation**

## All Staff

**8/7 - 8/17:**  
**All staff** survey

## SWOT Session

**October:**  
**Leadership**  
considers staff input  
and identifies SWOT

## Prioritizing Action Session

**November:**  
**Leadership** and  
**Board** define  
priorities for 2023



# Presentation: All-Staff Survey & Teams' Input

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## All-Staff Survey Overview

- August 7, 2023 until August 18, 2023
- Of the 80 employees who received the survey, 70 responded for an overall response rate of 87.5%
- 93% completion rate
- 47 survey questions (some questions include subparts which are not accounted for in this number)
- Overall assessment of current employee engagement, team dynamics, and organizational culture for HASLO at all levels of the organization

### General Measures

- 70% or more is considered a strength
- 30% or more negative is considered a challenge
- 25% or more combined fairly neutral responses suggests uncertainty, presenting an opportunity for communication within organization

Using a binary breakdown (+/-), HASLO has 27 strength items (of 36 total questions) and 9 challenge items (of 36 total questions)

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# Survey-Identified Positive Highlights

Due to the large number of strengths identified at the 70% agreement threshold, we used the threshold of 90% agreement to identify the top strengths, according to the survey.

97%

**I know what is expected of me at work.**

95%

**My associates or fellow employees are dedicated to doing quality work.**

94%

**The mission or purpose of my company makes me feel my job is important.**

93%

**My immediate supervisor, or someone at work, seems to care about me as a person.**

91%

**If needed, I feel comfortable asking my supervisor when I need help, when I cannot handle a certain workload or task, and/or when I feel overwhelmed by my responsibilities.**

90%

**My organization is dedicated to diversity and inclusiveness.**

90%

**I have a friend at work.**

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# Survey-Identified Areas for Improvement

We used the threshold of 30% disagreement to identify the top areas for improvement, according to the survey. Percentages represent disagreement, unless noted by \* which signifies agreement.

58%

**There are things that have broken down and have not been addressed.\***

45%

**In the last year, my manager(s) checked in with me about opportunities for growth or potential development paths.**

41%

**In my direct working knowledge, new staff on my team get properly (\*) trained for their role and feel ready for their responsibilities.**

37%

**I often feel overwhelmed by the amount of change I experience in my role, projects I am involved in, and/or the organization. \***

37%

**There is positive communication between all levels of staff.**

37%

**Concerns may be voiced without repercussion.**

32%

**Everyone's voice is heard and valued.**

31%

**The workload is spread fairly among team members.**

30%

**In the last seven days, I have received recognition or praise for my work from a supervisor and/or teammate.**

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# Qualitative Survey Question Highlights

Although there are more open-ended questions in the survey, we focused on Questions 10 and 11—**current vs. ideal work environments**— as it might inform the Vision for the Future discussion today.

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## What is your current working environment?

- **Busy**, stressful, distracting, fast-paced, productive, intense workloads
- Care, cooperative, **collaborative**, listened to, **friendly**, helpful, safe, secure, welcoming, respectful
- Dedicated, hard-working
- Challenging
- Tension
- Clean, organized
- Siloed, independent, autonomous
- Improving, transitioning
- Level of flexibility (some say inflexible, others say flexible)
- Unclear policies and procedures, lacks structure, shared confusion
- Good/**positive environment**
- Important work
- Relaxed, calm, peaceful, quiet
- Resentment, retaliatory
- Gossip, slander, defensiveness
- Double standard, inconsistency, not fair
- Open-door policy with upper management
- Varied responses relating to difficulty asking other departments for help

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# What is your ideal working environment?

- Safe, Innovative with psychological safety, more planning-less reaction
- Friendly, kindness, caring, encouraging, appreciated, valued, considerate, inclusive, healthy and productive working relationships, professional environment, respected boundaries and workspace, no drama
- Diverse
- Flexibility, hybrid, 4-10 schedule
- Good communication, full disclosure, trust, open to bring up concerns
- Autonomous, create own work plan
- Supervisor available and open, strong management that's approachable and supportive, understand diversity of populations served, recognize individual strengths, treat equally
- Growth and creativity encouraged, challenging
- Cooperation, collaboration, teamwork, team building, supportive, cohesive, not siloed
- Opportunities to work or break outside
- Fun, joyful, interactive, good attitudes
- Goal oriented, mission-driven
- Cohesive, not competitive, share information
- Busy, calm
- Recognition, good feedback
- Share knowledge
- Quiet, offices with closed doors (client calls)
- Vacation is an option (without being buried)
- Fair pay
- More space, clean, happier office decor, standing desk, windows open for fresh air, plants
- Weekly meetings (online option)
- Training, straightforward/written policies and procedures, not straying from Fair Housing recommended policies, enforcement of lease, clear structure and division of labor
- Tools needed to do best work

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## Pre - Session Team Meeting Takeaways

- Six team meetings and one Board meeting held
- All employees attended meetings in-person
- Many great strengths, areas for improvement and ideas were offered up—some team-specific, some agency-wide

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## Board: What would be a success?

- All staff/Board will be able to give "elevator pitch" about HASLO's mission/strategies
- Communications between staff and residents, Executive Director and Board
- Deeper understanding of structure of HASLO and staff
- Uniting all staff
- Buy-in

## Board: What would be a failure?

- Not feeling valued or heard
- Misunderstanding
- Not meeting timeframes
- Waste of staff and volunteer time, without a clear path forward
- Board and staff "tuned out," just smiling and nodding

# HASLO's Strengths (themes)

- HASLO is mission & service driven; public face (23%)
- Flexibility & preparedness of staff (18%)
- Teamwork & team dynamic (13%)
- Client/customer service (8%)
- Management & leadership (6%)
- Collaboration (external) (6%)
- Staff treatment & standards (6%)

# HASLO's Weaknesses (themes)

- Policy & procedure (16%)
- Workload (13%)
- Opportunities to interact with all teams (9%)
- Training & staff development (10%)
- Communications (internal) (7%)
- Collaboration (internal) (7%)
- Communications (external) (6%)
- Schedule flexibility (3%)
- Teamwork & team dynamic (3%)
- Technology (3%)
- Change management (3%)

## Wish HASLO did/had (themes)

- Opportunities to interact with all teams (18%)
- Training & staff development (16%)
- Communications (internal) (11%)
- Technology (9%)
- Appreciation & recognition (9%)
- Collaboration (internal) (8%)
- Policy & procedure (7%)
- Self care (4%)
- Work environment (3%)
- Resources (3%)
- Organizational effectiveness & culture
- Schedule flexibility
- Benefits
- Belonging and diversity
- Flexibility & preparedness of staff
- Opportunities to learn from other organizations
- Staff treatment & standards
- Succession planning/knowledge sharing
- Workload

**Questions,  
Comments, or  
Clarifications?**

# Presentation: SWOT Session Findings

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## Internal Strengths

1. Forward-thinking/innovative; Leadership; Vision
2. Compassion; Trust/care for staff
3. Open door policy; Openness; Accessibility
4. Making investments in staff/other areas; Team support
5. Dedicated staff; Committed to our purpose; Meaning and compassion

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# Internal Weaknesses

1. Lack of work-life balance; Burnout; Overwhelm; Inability to take time off; Lack of workload/caseload balance
2. Limited collaboration; Limited inter-department collaboration and dynamics
3. Lack of communication across organization & team building; trickle down communications
4. Need policies and procedures
5. Turnover/retention

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# External Opportunities

1. Market rate housing for employees; Workforce housing
2. Partnerships (nonprofits, governments); Strengthen outside collaborations with vendors (client support)
3. Grant writer; Pursue philanthropic funding
4. Internships, Federal work study programs and/or next generation staffing; Cuesta, Cal Poly; Eckerd for unemployed clients
5. Cross-collaboration with partner agencies for training opportunities

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# External Threats

1. Generations' perception of work day, work ethics, etc.); cultural shift; pandemic; remote openness; working from home only
2. Inflation; cost of living
3. Compliance changes; HUD regulations
4. Government shutdowns; Federal/State/County funding
5. Expectations of HASLO; Community perceptions and support

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## 10 minute break



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# Exercise: Vision of the Future

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## 15 minute break



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# Exercise: Obstacles to Vision

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**45 minute  
lunch break**



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# Exercise: Strategies & Actions to Achieve Vision

## Team Meetings

**8/17 - 9/18:**  
Teams provide  
initial input

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# Closing