



LAYING FOUNDATIONS, BUILDING STRENGTH

# VISION 2023 - 2027



lacasa

Strong foundations. For everyone.

# Introduction

As our region emerges from the acute stages of the global pandemic and reckons with unprecedented economic volatility, Lacasa is committed to harnessing its strengths to build our communities. Lacasa will deliver consistent, effective, and sustainable impact that fortifies housing and contributes to neighborhoods. This will require organizational adaptability, operational excellence, and strong community engagement.

Our country and our communities are facing severe housing shortages that constrain economic development and exclude lower-wage earners from homeownership and decent rental options. As a society, we are also grappling with compounding wealth and opportunity disparities. Rising to these challenges requires strong collaboration with community partners where the best solutions prevail.

Lacasa has an unquestionable record of success with improving housing, strengthening neighborhoods, and facilitating wealth building. These strengths must be leveraged in a focused manner. We will be disciplined in responding to community needs, with the passionate support of community members, providing services no one else offers.

With this backdrop, we present the 2023 – 2027 strategic plan, starting with our mission and core values, and moving into organizational goals, key initiatives, and outcomes.

## Lacasa Mission

Lacasa works with individuals and community partners to create opportunity for personal empowerment, family stability, and neighborhood vitality.

## Core Values

- Respect Human Dignity
- Work Together
- Pursue Excellence
- Build to Last

## Organizational Goals

- Strengthen Housing and Wealth-Building Opportunities
- Strengthen Communities
- Strengthen the Team
- Strengthen the Brand and Business Model







### STRENGTHEN HOUSING AND WEALTH-BUILDING OPPORTUNITIES

Lacasa is known for our proven ability to strengthen families and housing. We complete projects and deliver programs that are unique to our area and focus on providing pathways for people with fewer resources to thrive. We serve our community's diverse populations through multi-cultural and bilingual capabilities. Our robust suite of services leverages expertise and partnerships, reflects excellence, and positively impacts our region's development.



### STRENGTHEN THE BRAND AND BUSINESS MODEL

Lacasa is respected as a strong and reliable nonprofit, ideal for charitable investments and is an integral partner for community development efforts. Broad community support of Lacasa has resulted in successful fundraising. Strongly connected across its service footprint, Lacasa is efficiently run and financially healthy, with a focus on high community return on investment.



## STRENGTHEN COMMUNITIES

Lacasa excels at strengthening focus communities. We connect with these communities to engage their residents, strengthen their voice, support their leaders, and assist in plans that build on their assets. Work in these communities is informed and driven by the voices of their residents and stakeholders.



## STRENGTHEN THE TEAM

Lacasa is an employer of choice that values and develops each team member and celebrates their strengths and diversity. Lacasa has well-trained and engaged team members that collaborate to achieve mission-focused results. Our team members are committed to our mission, aligned with our values, and engaged with our clients and community.



## Goal #1

### STRENGTHEN HOUSING AND WEALTH-BUILDING OPPORTUNITIES

*Lacasa is known for our proven ability to strengthen families and housing. We complete projects and deliver programs that are unique to our area and focus on providing pathways for people with fewer resources to thrive. We serve our community's diverse populations through multicultural and bilingual capabilities. Our robust suite of services leverages expertise and partnerships, reflects excellence, and positively impacts our region's development.*

#### Outcomes:

1. Lacasa will make preservation investments<sup>1</sup> in 115 housing units in our region. Lacasa will construct 80 new rental housing units and 30 new homes for home ownership. Funding will be secured for one preservation or new housing project of a 50 -unit or greater scale.
2. 350 households will reach an important financial milestone<sup>2</sup>, generally by acquiring or strengthening a financial asset through Lacasa services. Lacasa financial workshop attendance will increase by 10% annually from a projected 275 attendance in 2022, in part through strategic partnership development. 350 households will have greater access to the financial mainstream through non-predatory, low-barrier, financial products.
3. Lacasa will own and manage a portfolio of 400+ housing units by 2027. Lacasa will attain a CORES certification<sup>3</sup> for its tenant resource services by 2024.

#### Key Initiatives:

1. Lacasa improves and expands affordable housing across the region.
2. Lacasa helps individuals and families build wealth through our customer-centric continuum of services that improve financial inclusion, health, and capabilities.
3. Lacasa provides quality, safe, well-maintained, and affordable housing units while connecting tenants to resources.



Lacasa's focus on housing and improved financial health has never been more relevant than in 2022. The region is experiencing a dramatic housing shortage that is driving up home purchase and rental pricing. Elkhart County's unemployment rate is one of the lowest in the country and over 20,000 more people traveling into the county than leaving for their jobs. Earning potential is high.

However, as we launch this plan, economic volatility is also high. Inflation is a growing concern. Interest rates are rising. High gas prices are a potential precursor to a slowdown in recreational vehicle demand. There are many voices warning of recession.

Lacasa will maintain an aggressive posture toward housing preservation and development in this plan. We will continue to grow our impact with financial empowerment workshops and services to help people achieve important financial milestones and increase stability. We will seek opportunities to exceed these achievable goals.

**Lacasa will maintain an aggressive posture toward housing preservation and development.**

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<sup>1</sup>Preservation investments in housing includes owner-occupied repairs, significant updates/upgrades to Lacasa-owned properties to maintain high quality, and existing properties that Lacasa purchases for major rehab and creation of affordable housing units.

<sup>2</sup>A financial milestone is typically a home purchase, home improvement, small business development, postsecondary education, vehicle purchase, or improved credit score.

<sup>3</sup>The Certified Organization for Resident Engagement & Services (CORES) certification through Stewards of Affordable Housing for the Future (SAHF) recognizes organizations that have developed a robust commitment, capacity, and competency in providing resident services coordination in affordable rental housing.



## Goal #2

### STRENGTHEN COMMUNITIES

*Lacasa excels at strengthening focus communities. We connect with these communities to engage their residents, strengthen their voice, support their leaders, and assist in plans that build on their assets. Work in these communities is informed and driven by the voices of their residents and stakeholders.*

#### Outcomes:

1. 100% of focus communities will create and/or implement resident-informed plans leading to greater resident engagement and connections of trust.
2. Tenants will be connected to resources to experience greater stability. Stability will be measured via a survey process that will be defined and implemented by the end 2022. Baselines will be established and improved upon over the plan period.
3. Groups of neighborhood leaders and/or Lacasa tenants will attend the NeighborWorks Community Leadership Institute<sup>7</sup> annually, learning best practices and completing a project that is beneficial to their community.
4. Municipal, infrastructure, private, and nonprofit investments will increase in the focus community, leading to improved quality of life and place. Measurement tools will be evaluated, with one selected and implemented by the end of 2023.

#### Key Initiatives:

1. Lacasa works with residents and partners in identified focus communities<sup>4</sup> to inform and implement comprehensive community development<sup>5</sup> strategies.
2. Neighborhoods and their leaders and Lacasa tenants are supported and connected to each other and resources.
3. Lacasa's real estate development line of business works closely with the community building and engagement<sup>6</sup> line of business, residents, and community stakeholders to make targeted housing investments.



Regardless of one's personal achievements, status or position, community is important. We define community in a variety of ways. Perhaps it is the block we live on, the property where our apartment is located, or even our neighborhood. We live in an interdependent world, and this interdependence is experienced no matter how we define our community.

Lacasa has a long history of identifying focus communities with fewer resources and working in partnership with them to strengthen their assets. In communities with fewer resources, the forums and structures for maximizing these assets are often lacking, and as these assets are built upon, the community is strengthened. Our pledge to focus communities is to create deep and lasting impact over multiple years.

As a member of the NeighborWorks America network of excellence, we embrace their emphasis on positive change, informed and driven by the communities in which it occurs. This plan is evidence of a renewed commitment to leverage our strengths and deliver positive results in focus communities. As under-resourced communities build strength, our region becomes more vibrant, the goal of equity is achieved, and all are enriched.



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<sup>4</sup>Focus communities are defined as geographic areas in which Lacasa is most connected and focusing our Community Building and Engagement, Real Estate Development, leadership activities, and it often includes one or more Lacasa-owned properties. These are usually low-to-moderate income neighborhoods and includes an intentional approach and long-term investment.

<sup>5</sup>Comprehensive community development (CCD) is an approach to improving lives and strengthening communities through community-driven processes and plans and bringing together community stakeholders and support by cross-sector partnerships. Strategies are resident led and create sustainable long-term change.

<sup>6</sup>Community Building and Engagement (CBE) is a line of business supporting resident engagement and leadership, which are essential for communities/neighborhoods to realize their unique vision for a vibrant and welcoming place for all to call home.

<sup>7</sup>Lacasa is a chartered member of NeighborWorks America, which provides access to resources and training like their annual Community Leadership Institute (CLI). CLI is an invitation-only, three-day training event that aims to strengthen the voices and skills of community leaders. It consists of sharing best practices and solutions to challenges in low- and moderate-income communities to teams from across the country, with each participating team creating an action plan for making positive change in their community and the opportunity for a grant to help fund it.



## Goal #3

### STRENGTHEN THE TEAM

*Lacasa is an employer of choice that values and develops each team member and celebrates their strengths and diversity. Lacasa has well-trained and engaged team members that collaborate to achieve mission-focused results. Our team members are committed to our mission, aligned with our values, and engaged with our clients and community.*

#### Outcomes:

1. All teams will be provided with and implement a tool for tracking/monitoring progress on personal, departmental, and organizational goals, leading to a positive culture of accountability.
2. All employees will participate in development activities leading to a continuous learning environment.
3. All Lacasa meetings will open with the same mission-focused structure, leading to consistency, organizational alignment, and a deeper sense of belonging. All staff will experience Lacasa outside of their area of responsibility, leading to a broader understanding of organizational impact.
4. Lacasa will develop and implement a twice annual staff survey by the end of 2027, increasing staff engagement and informing the organization's continuous improvement.

#### Key Initiatives:

1. Lacasa cultivates a culture of accountability and belonging<sup>8</sup>, with an ecosystem of internal policies and processes that support equity, flexibility, and high performance.
2. Lacasa team members want and have opportunities to learn and develop and be engaged in ways that reflect their capabilities.
3. Lacasa team members collaborate to engage and align with the mission, core values, and strategic plan.



Great people and a great team are the currency of Lacasa's mission impact. The workplace landscape has changed dramatically over the past three years. Pandemic-forced adaptations in the workplace persist. Virtual tools and the widespread comfort with remote interactions and services bring opportunities for flexibility as well as challenges in management.

We enter this plan at a time of low unemployment and high labor competition. We love our mission and are confident that a sense of connection with this mission is our strongest recruitment and retention tool. Our workplace must exemplify our core values. Team members are respected and valued. Together we pursue excellence in delivering an impact that is both powerful, and long-lasting.

Lacasa's culture must be one where team members are: relentless in their efforts to serve the community, working within our business model, accountable to the community and each other, fulfilling their sense of belonging and contribution. Team members who exhibit this hunger for growth and excellence will thrive in a collaborative, flexible and supportive work environment. They will be treated fairly, and they will recommend employment at Lacasa to others.

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<sup>a</sup>A culture of accountability and belonging is a place of mutual accountability to reaching goals and deepening impact at all levels of the organization, supported by systems, processes, and practices, and a space of feeling included, accepted, and supported.



## Goal #4

### STRENGTHEN THE BRAND AND BUSINESS MODEL

*Lacasa is respected as a strong and reliable nonprofit, ideal for charitable investments and is an integral partner for community development efforts. Broad community support of Lacasa has resulted in successful fundraising. Strongly connected across its service footprint, Lacasa is efficiently run and financially healthy, with a focus on high community return on investment.*

#### Outcomes:

1. By 2027, Lacasa's brand will be clear and known across our service area because of investments in brand-building marketing and strategic networking.
2. Lacasa will increase the annual philanthropic revenue from donations, grants, and sponsorships from a 3-year average of \$580,000 to a 3-year average of \$750,000 by the end of 2027.
3. Lacasa will receive clean external audit reports annually. We will retain our NeighborWorks organizational health status of "Exemplary"<sup>9</sup>. We will maintain at least 90 days of operating cash on hand and strengthen our balance sheet by increasing our net assets by 20% over our current \$26,525,257 by the end of 2027.
4. All Lacasa service lines will deliver well-defined and sustainable impact, as demonstrated by impact models, performance dashboards, and financial results<sup>10</sup>. Customer feedback mechanisms will consistently reflect positive outcomes following engagement, with an increasing net promoter score.<sup>11</sup>

#### Key Initiatives:

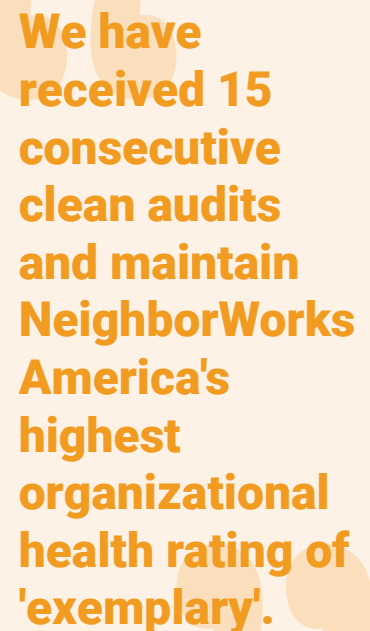
1. Lacasa increases the agency's visibility and improves the public's awareness of its mission and services.
2. Lacasa provides opportunities for new and current donors to expand their support for and engagement with the organization in significant ways.
3. Lacasa demonstrates excellence in financial management and maintains a position of financial health.
4. Lacasa invests in strengthening its core competencies, continuously improves operations and service delivery, and achieves budgetary targets to sustain community impact.



Lacasa has been a high impact nonprofit in Elkhart County for 52 years. Success continues to depend on our ability to adapt to a changing environment and deliver high-impact services with excellence. Adaptation has characterized our growth and progress over the years. We have adjusted our service offerings, integrated new types of funding and projects and have expanded our geographic focus.

In 2022, Lacasa faces persistent challenges with brand clarity and awareness. Many believe we exclusively serve Hispanics in Goshen, which was largely accurate at one time, but is not reflective of the whole of who or where we serve now. Today we believe the Lacasa mission can serve as a catalyst for broad enthusiasm and support in our region. To realize this, our brand must be compelling and clear. Brand-building and fundraising will be major focuses in the coming five years. Our ability to succeed on these fronts will directly translate into greater impact and a stronger community.

Equally important is the strength of Lacasa's business model and its financial health. We have received 15 consecutive clean audits and maintained NeighborWorks America's highest organizational health rating of "exemplary." We seek to retain these standings while preserving sufficient liquidity and a strong balance sheet. Our business model must focus on high impact in the areas of our strongest competencies. We will be disciplined in our work, playing to our strengths and engaging partners with complementary strengths. We will continue to adapt our model to meet the needs of a changing environment and ensure that our community experiences unduplicated impacts from a strong Lacasa.



**We have received 15 consecutive clean audits and maintain NeighborWorks America's highest organizational health rating of 'exemplary'.**

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<sup>9</sup>NeighborWorks conducts an organizational assessment every three years of every member organization, rigorously assessing against various organizational, financial and board governance standards and each must maintain certain standards to remain within the network. Lacasa has been rated Exemplary, the highest possible rating, since 2009.

<sup>10</sup>The development and use of tools such as impact models provide clarity around the positive outcomes desired with those we work with (individuals, households, communities), defining the critical data to know if we are successful, and systems to collect that data.

<sup>11</sup>Net promoter score (NPS) measures customer perception based on their likelihood of recommending the organization or service. Customers are either promoters, passive, or detractors, with the NPS being the percentage of promoters minus the percentage of detractors.

# Building Strength on a Foundation of Achievements

## 1970 - 1979

- Two groups form focusing on immediate needs of migrant farmworkers in Goshen and helping low-income households find safe, affordable housing.
- The two groups merge, using the legal identity of Man-to-Man, Inc. The office center, “La Casa”, is the focal point for the organizational activities.
- Seven rental units are purchased and owned by Man-to-Man.

## 1990 - 1999

- Help-A-House<sup>SM</sup> is established to help low-income homeowners with high-cost repairs.
- The target area is expanded from the City of Goshen to all of Elkhart County.
- The organization became known as “LaCasa”.
- Completed Arbor Ridge, a 72-unit apartment community in Goshen in 1999.

## 2010 - 2019

- First partnered with Oaklawn in 2012 to create 16 safe, attractive, and functional apartments for persons who were formerly homeless.
- The Hawks, the first low-income residential community for artists and entrepreneurs in the area, was completed with 35 apartments in 2015 and spurred significant additional housing and economic investment in the Goshen Millrace area.

## 1980 - 1989

- Immigration services expand due to Amnesty Act.
- “There was a transition from meeting immediate needs to addressing long-term needs. We put into place the steps needed to address issues that were affecting the community,” Arden Shank, Executive Director 1988-2001.

## 2000 - 2009

- Individual Development Account (IDA) matched savings program, which began in 1998 as a pilot with Lacasa, is made permanent by the State of Indiana in 2002.
- Expanded our role in the City of Elkhart in 2008, completing Water Tower Place (52 units of new construction senior housing), Roosevelt Center (35 apartments and commercial space) and acquiring 169 State and 516 S. Main (20 apartments and commercial space).

## 2020 and Beyond

- Opened the new Elkhart office, and two weeks later closed due to the COVID-19 pandemic. Despite pandemic challenges, Lacasa created 23 new rental housing units and relaunched work in single family housing development for homeownership.
- 342 rental housing units are owned and operated in Elkhart County and the largest real estate development pipeline of projects have been established in the agency’s history, including both rentals and homes for homeownership.









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