



Southwest Tribal
Housing Alliance

STRATEGIC VISION 2026 – 2029

Comprehensive Strategic Plan



May 14-15, 2025
Twin Arrows Navajo Casino Resort

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Southwest Tribal Housing Alliance (SWTHA)

Strategic Plan - 2026–2029 Strategic Vision

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1) Executive Summary

Strategic Planning Session. SWTHA convened members and partners on **May 14 - 15 in Flagstaff, AZ (Twin Arrows Navajo Casino Resort)** to shape a three-year strategy for 2026–2029. The plan reflects what we heard in the room and in follow-up interviews with member tribes and associate members.

Who SWTHA serves.

SWTHA is the regional alliance for **Region VIII tribal housing programs** - primarily TDHEs and tribal housing departments across **Arizona, New Mexico, and Texas** - and the network of **associate members** (Native CDFIs and lenders, builders, architects/engineers, trainers, legal and risk partners) that support them. Core public partners include **HUD/SWONAP, NAIHC, AMERIND**, intertribal councils (e.g., **ITCA, APCG**), and state housing agencies.

What this plan does.

It **sets a three-year course** grounded in member input, operating data, and what is feasible for a lean alliance. The plan clarifies priorities, assigns ownership, and names the products, milestones, and measures SWTHA will report publicly each quarter.

Strategic Goals (2026–2029)

- **Goal 1 — Communication, Outreach & Engagement.** Increase SWTHA’s visibility, participation, and stakeholder engagement through consistent, culturally grounded communication.
- **Goal 2 — Advocacy, Policy & Representation.** Serve as the unified voice for Region VIII by proactively influencing housing policy through coordinated advocacy and partnerships.
- **Goal 3 — Capacity Building & Workforce Development.** Deliver a comprehensive, culturally grounded training program that grows current staff and the next generation of housing leaders.
- **Goal 4 — Organizational Stability & Sustainability.** Strengthen governance, finances, and internal structure to support growth, accountability, and long-term regional impact.

Big Moves (2026–2029)

1. **Redesigned Website + Knowledge Hub.** A task-based website (Q4 2025) and members-only Hub (v1 in FY2026) with a live training calendar, resource library, vendor directory, case examples, and office-hour sign-ups.
2. **Advocacy Engine.** Annual Position Paper, quarterly Policy Watchlist, visible Outcomes Notes, and a rapid-response letter pool—aligned with ITCA/APCG and national partners.
3. **Full-Year Training Calendar + Technical Office Hours.** Rolling schedule published each January; embedded HUD/ONAP content; practical compliance and operations support between meetings.
4. **Leadership Pipeline & Scholarships.** A cohort program (launch by 2026) linked to internships/apprenticeships and trades/housing scholarships.
5. **Homeownership Finance Pathway.** Roundtables and partnerships with Native CDFIs and CRA lenders to move households toward Section 184 readiness and closing.

6. **Sustainability Tools.** Tiered dues, a finance dashboard and reserve policy, and an updated Associate Program (with clear benefits and ethics) to stabilize revenue and delivery.

Key Outcomes by 2029

- **Access & Engagement**
 - Website live with **≤3 clicks** to Calendar, Trainings, Scholarships; **Knowledge Hub** at **60+** quality resources and **30+** member↔provider matches per year.
 - Predictable cadence: **12** monthly updates and **4** newsletters annually; open rate **≥35%**, CTR **≥7%**; social reach **+25% YoY**.
 - **Quarterly** Tribal Leadership Briefings; **2** listening sessions each year.
- **Advocacy & Policy**
 - **1** Position Paper each year; **4** Policy Watchlists annually.
 - Presence at **3** key housing events per year and **≥1** federal consultation annually.
 - Cumulative progress on local readiness: **≥8** communities adopt/update building codes or related ordinances by FY2028.
- **Capacity & Workforce**
 - **≥18** trainings per year; participant satisfaction **≥4.4/5**.
 - **6** technical office-hour cycles per year with **≥80%** of tickets resolved within **30 days**.
 - Leadership Pipeline operating with **≥25** participants/year; internships **≥20/year** by FY2027.
 - **100** households **Section 184-ready** (cumulative) by FY2028.
- **Stability & Growth**
 - Membership growth to **35 tribal members** and **20 associate members** by **2026**, with continued gains through 2028.
 - **Tiered dues** implemented; **training net margin ≥15%**; **days sales outstanding ≤45**; **operating reserves ≥6 months** by FY2028.
 - Associate Program 2.0 delivering **≥80%** renewal and structured contributions (teach-ins, showcases).

This plan equips SWTHA to communicate clearly, advocate effectively, build capacity where it's needed most, and sustain the alliance—so Region VIII tribal housing programs can lead, build, and thrive.

2) Organizational Background

Who we are. The Southwest Tribal Housing Alliance (SWTHA) is the Region VIII alliance representing tribal housing entities in **Arizona, New Mexico, and West Texas**. SWTHA is the recognized regional body to the National American Indian Housing Council (NAIHC) and convenes member programs to coordinate training, advocacy, and peer support across the Southwest. Established in **2009**, the alliance continues to grow its membership base and influence as more programs join.

Membership. All Region VIII tribal housing departments/TDHEs are invited to join or renew annually. SWTHA also welcomes **Associate Members**—organizations that support tribal housing and/or provide products or services to member programs (e.g., public interest groups, businesses, suppliers, vendors, service providers, and federal/state-recognized tribes and housing agencies). Associate Members are **non-voting** but participate in learning, networking, and regional initiatives. As of late **2023**, SWTHA counted **29 members of a possible 41** housing programs in the region.

Member engagement & cadence. SWTHA holds **triannual in-person membership meetings and trainings** hosted by member tribes and convenes **monthly Zoom meetings on the 2nd Tuesday** to sustain coordination, provide timely updates, and feature guest speakers.

Programs & services.

- **Training & Technical Assistance.** SWTHA curated sessions on compliance, development, finance, inspections, workforce, and emerging topics identified by members (including HUD/SWONAP and partner-delivered trainings).
- **Regional Advocacy.** SWTHA organizes a unified voice on federal and state policy impacting tribal housing, including publishing a **regional position paper** and coordinating presence at key events and consultations.
- **Scholarships.** Through donations and partners, SWTHA administers an **Annual Scholarship Program** for students enrolled in member tribes to support post-secondary, graduate, or accredited vocational study.
- **Networking & Resource Sharing.** The alliance facilitates peer learning, shares tools (e.g., resource guides), and amplifies member success stories across the region.

Core values. SWTHA’s work is guided by **Integrity, Respect for Membership, Professionalism, and Transparency**.

Partnerships. SWTHA collaborates with NAIHC and AMERIND and engages agencies and partners across the region to expand training, policy reach, and funding opportunities.

Governance & leadership. SWTHA is governed by an elected Board of Directors. Current officers and representatives include:

- **Jamie Navenma**, President and NAIHC Representative
- **Francisco Carr**, Vice President and Region VIII NAIHC Alternate Representative

- **Rhoda Eustace**, Treasurer and Region VIII AMERIND Alternate Representative
- **Lorrie Chavez**, Secretary
- **Veronica Ruiz**, Region VIII AMERIND Representative
- **Lukaya Williams**, Board Member and Arizona Representative
- **Thana Leslie**, Board Member and Arizona Representative
- **Rachel Salas**, Board Member and New Mexico Representative
- **David Martinez**, New Mexico Representative
- **Martha Beltran**, Board Member and West Texas Representative

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3) Strategic Planning Approach

This plan was built through a practical, member-led process that reflects how SWTHA works: we listen widely, meet each other where we are, and turn shared priorities into action. The approach balanced broad input with focused co-design, so the final product is both credible to members and workable for the Board.

The effort began with mobilization and alignment, led by **Project Manager/Facilitator Brandi Liberty (The Luak Group)**. Working with the Board, we confirmed the planning horizon, the questions we needed to answer for the region, and the cadence for check-ins through SWTHA's second-Tuesday monthly meetings. We then reviewed core organizational materials—including recent planning outputs, program summaries, and policy positions—to understand what was already working and where clarity was needed.

Listening came next. Rather than a large convening, we conducted **twelve stakeholder interviews** with a cross-section of the membership—tribal housing program leaders across Arizona, New Mexico, and West Texas; Associate Members; and SWTHA's pro bono attorney. These confidential conversations surfaced the day-to-day realities of delivering housing, the constraints members face (funding, workforce, compliance, communications), and opportunities to elevate regional coordination and advocacy. The themes from these interviews shaped the future of the strategic plan.

We also convened a **two-day strategic planning session**, which combined environmental scanning with collaborative design. Day One focused on situational analysis—revisiting 2024 progress, updating SWOT, and scanning the Region VIII landscape through a PESTLE lens. Day Two translated those insights into strategy: we refreshed SWTHA's key priority areas, defined the core outcomes the Alliance seeks to achieve over the next three years, and drafted goal-level building blocks: owners, SMART objectives, early initiatives, and the first cut of performance indicators. Throughout, we emphasized feasibility, member value, and transparency.

This written document reflects the **drafting phase**—distilling the interviews and workshop outputs into a clear strategic framework with goals, objectives, and measures that the Board and membership can stand behind. Following this, **adoption and launch** become SWTHA's responsibility, including final approval by the Board, a member briefing, and publication of a one-page summary for broad use. **Implementation, monitoring, and learning** will also be led by SWTHA: committees and staff will carry the goals forward, report on progress through a quarterly scorecard, and make adjustments as conditions change. **Goal leads will be assigned at the September 2025 fall SWTHA meeting**, ensuring ownership aligns with the post-adoption structure and volunteer capacity.

Across all phases we honored SWTHA's core values—Integrity, Respect for Membership, Professionalism, and Transparency—and the sovereignty of member nations. Interview insights are reported in aggregate without attribution; decisions made in the workshop are documented for clarity; and progress will continue to be shared during monthly meetings so members can see themselves in the plan and in the outcomes it drives.

4) Alignment with SWTHA Priorities & RFP Deliverables

SWTHA’s 2026–2029 Strategic Plan is organized around four overarching Goals that directly advance the mission “to be the united voice for tribal housing in the Southwest” and the vision of thriving, culturally grounded housing programs.

Together, the Goals create a closed loop of value for members:

- **Communication, Outreach & Engagement** keeps programs, leaders, and partners on the same page—so opportunities, deadlines, and resources are acted on in time.
- **Advocacy, Policy & Representation** turns regional needs into national action—tribe-led messages, clear outcomes, and consistent feedback to members.
- **Capacity Building & Workforce Development** equips today’s staff and grows tomorrow’s workforce—practical trainings, peer exchanges, and pathways to homeownership and trades.
- **Organizational Stability & Sustainability** protects and scales the Alliance—predictable revenue, associate engagement, and strong governance so the work endures.

Alignment with Partner Priorities

- **HUD / SWONAP** – The plan emphasizes compliance-readiness and performance improvement that mirror ONAP priorities: recurring **HOTMA/NSPIRE** refreshers; stronger **IHP/APR quality** and **GEMS/eLOCCS** help desks; procurement and self-monitoring refreshers; leader briefs on **building codes** and environmental review. These elements support NAHASDA program integrity, capacity building, and measurable outcomes.
- **NAIHC** – SWTHA’s **tribe-led advocacy** cadence, annual **Position Paper**, and **Hill-day coaching** align with NAIHC’s national policy work and T/TA mission. The regional training calendar, peer mentoring, and leadership development complement NAIHC offerings while localizing them to Region VIII needs.
- **AMERIND** – Safety, risk reduction, and property preservation are integrated through training tracks on maintenance, codes, and emergency preparedness, with opportunities to co-host sessions on **risk management, mitigation funding, and claims readiness**. Scholarship and workforce pathways into the **trades/construction** bolster long-term asset protection and community resilience, which aligns with AMERIND’s prevention-first approach.

The four Goals operationalize SWTHA’s mission and deliver tangible member value—faster information, stronger advocacy, practical training, and a stable organization—while syncing with partner priorities to avoid duplication, leverage resources, and amplify outcomes for the Southwest tribal housing community.

5) Mission, Vision, and Values

During the 2025 strategic planning session, SWTHA revisited the organization’s legacy statements—Vision:

“Region VIII Tribal Housing Advocate”

and Mission:

“To be the voice for Tribal housing by providing relevant, timely information, resources and a valuable network for the SWTHA membership.”

Members agreed these lines no longer captured the scope and ambition of SWTHA’s work or the realities facing tribal housing programs. The discussion surfaced several gaps: the absence of explicit advocacy at the tribal, state, and federal levels; the need to name capacity-building and workforce development as core functions; and the importance of cultural grounding and alliance-building across Native communities.

In a future-forward exercise, participants reviewed multiple drafted options, read them aloud, and refined language to emphasize thriving programs, leadership development, and a strong regional alliance that honors culture while expanding relationships with state partners and national forums.

The group ultimately converged on a longer, aspirational **Vision**—retained for its clarity and motivational power after minor flow edits:

“To build a future where Indian housing professionals and tribal housing entities thrive — supported by funding, resources, and leadership development through Southwest Tribal Housing Alliance’s (SWTHA’s) capacity-building and advocacy efforts, while remaining culturally grounded and empowered to lead.”

The **Mission** was tightened to be specific about who SWTHA serves and how:

“SWTHA is the united voice for tribal housing in the Southwest — advocating at the tribal, state, and federal levels while building an alliance rooted in tradition, collaboration, and shared strength across Native communities, promoting self-determination.”

These statements were adopted to guide the 2026–2029 plan and to align directly with the plan’s four overarching goals: Communication & Engagement; Advocacy & Policy; Capacity Building & Workforce; and Organizational Stability & Sustainability.

In adopting this language, SWTHA affirmed the values that surfaced in the session—

**Sovereignty & Self-Determination, Culture & Relational
Accountability, and Shared Strength & Learning**

—as the compass for decisions, partnerships, and performance measures. The revised statements now anchor the plan’s objectives and action items (training calendars, leadership engagement, peer knowledge-sharing, and revenue strategies), ensuring each deliverable speaks to a single, durable intent: build a stronger, culturally grounded alliance that helps Region VIII housing programs lead and thrive.

6) Stakeholder Input Summary - Synthesis of Interviews and Convening Notes: Themes, Pain Points, Opportunities, and Strategic Implications

Interview instruments and confidentiality

To inform the 2026–2029 plan, SWTHA conducted confidential, structured interviews with two stakeholder groups: (1) member tribes (housing programs in Region VIII) and (2) associate members (businesses and organizations that serve those programs). Each set used a standard instrument, recorded for accuracy, and responses are presented here in aggregate to preserve anonymity. For member interviews, participants were asked ten prompts that spanned the value of membership; where SWTHA should improve; how to deepen leadership engagement; priority trainings over the next three years; national advocacy effectiveness; barriers to participation; communications and outreach; partnerships to cultivate; what success looks like by 2028; and willingness to mentor peers. Interviewers stated explicitly that responses would remain anonymous and be synthesized for the plan.

Associate interviews mirrored that approach with a tailored instrument covering motives for joining SWTHA; how SWTHA can better support vendors and consultants; training/networking that would increase engagement; barriers to visibility; transparency and value of associate benefits; how to leverage associate expertise for advocacy and training; interest in best-practice showcases or mentorship; associate roles in long-term sustainability and workforce goals; and recommended changes to improve engagement over the next three years. These, too, were administered with standardized questions and anonymized reporting.

The two-day convening that preceded the interviews established direction and tested draft language and priorities; participants discussed, refined, and built consensus on forward-looking statements and what would be taken up in the plan.

What we heard: top cross-cutting themes

Across member interviews, the most consistently cited value of SWTHA is **practical training coupled with peer networking**—participants described meetings and trainings as especially useful for exchanging “how we do it” approaches and staying current. Members also emphasized the need for **more predictable, proactive communication**—touch points that make it easier to track events, speakers, and resources without having to “go looking.”

A second theme is **leadership engagement**: several members urged direct, formal invitations to tribal leaders—chairs, governors, and council reps—and use of inter-tribal councils as a channel, so leaders know when SWTHA needs them in the room.

A third theme is **capacity building for small teams**. Members asked for help with “time management for small staffs,” immediate compliance needs (e.g., HOTMA/NSPIRE), and—critically—**how to leverage funds beyond IHBG** (grants, lending partners, and other sources) to move from maintenance-only operations to development and homeownership pathways.

Associate interviews complemented this picture. Associates affirmed that **listening in on monthly meetings and tri-annual sessions** helps them understand member needs, and they want **more structured moments to contribute practical know-how** (e.g., short teach-ins, panels, or “sponsor-plus-lunch” sessions that guarantee an audience without overtaking member business). They also encouraged **matchmaking** between SWTHA’s “wish list” of trainings and the specific providers or funders who can deliver them, including an “associate member appreciation/showcase” to spotlight active partners.

Pain points and constraints

The most common constraints are **time and travel**. Some programs face HR policies (e.g., probationary periods for new hires) that make travel to meetings or trainings impossible for months, even when content is on point—underscoring the need for hybrid formats and lighter-lift touch points. Others cited **meeting design** issues (sessions can feel long or repetitive if not tightly curated for “what’s actionable now”), and **information scatter** when updates, documents, and contacts are spread across email threads or separate channels.

On the development side, a structural pain point is that **many housing entities still operate primarily as low-rent administrators** and are **not consistently leveraging IHBG or other sources** to build, finance, or acquire units—often due to risk, bandwidth, or political vulnerability. This reinforces the need for practical development finance, governance navigation, and advocacy supports.

Opportunities emerging from the interviews

Members asked for a **shared knowledge hub**—a living place to find contacts, vendor/contractor recommendations, sample scopes, and “who’s solved this” references—so each tribe isn’t reinventing the wheel. Associates offered to **co-create learning moments** (micro-trainings, panels, topic-specific roundtables) and to participate in **local networking meetups** between tri-annual meetings to reduce travel burden and increase touch points.

Several associate and member comments point to a **finance and partnerships track**—regular matchmaking between member needs and CDFIs, lenders, and philanthropic or state sources—coordinated by SWTHA so the “ask” and the “able to fund/deliver” meet quickly.

Implications for strategy and operations (2026–2029)

Communication, outreach, and engagement. The interviews support a move toward a **predictable communications cadence** (e.g., a monthly member digest and a continuously updated knowledge hub) and **purpose-built convenings** (shorter virtual drop-ins, local meetups, and tightly curated segments during tri-annuals). These approaches answer calls for easier access and lower-lift participation while keeping the larger network connected.

Advocacy, policy, and representation. Interviews reinforce that **advocacy must remain tribe-led** and grounded in member priorities, with SWTHA coordinating tools (position memos, talking points, and decision-tracking) and facilitating direct leader engagement at the right

moments. Pairing associate expertise to specific advocacy needs—without letting vendors drive the agenda—can expand capacity while honoring sovereignty and governance realities.

Capacity building and workforce development. The most immediate asks are **compliance refreshers**, **time-management for small staffs**, and a **practical development finance sequence** that demystifies leveraging beyond IHBG (pipeline design, sources/uses, underwriting partners, and operations impacts). Embedding short associate-led teach-ins and peer showcases inside the training calendar would keep sessions concrete and immediately useful.

Organizational stability and sustainability. The interviews point toward professionalizing the **associate member program** (clear benefits, scheduled showcases, and guidelines for contributions), building the **knowledge hub** as SWTHA’s durable asset, and designing **hybrid/low-travel offerings** that respect HR and budget constraints. These moves strengthen SWTHA’s value proposition while opening new sponsorship and partnership lanes tied to member outcomes rather than visibility alone.

7) Environmental Scan (SWOT & PESTLE)

SWOT Synthesis (Planning Session + Interviews)

<p>Strengths</p> <ul style="list-style-type: none"> • Practical trainings and peer networking with immediate takeaways • Active associate bench ready to co-train, mentor, and sponsor • Recognized regional voice with responsive information-sharing 	<p>Weaknesses</p> <ul style="list-style-type: none"> • Participation limits (HR/travel) and small-team bandwidth • Leadership engagement gaps; uneven codes/technical familiarity • Associate benefits not fully structured; ad hoc matchmaking
<p>Opportunities</p> <ul style="list-style-type: none"> • Members-only knowledge hub (vetted vendors, templates, office hours) • Leadership briefings; intertribal/state partnerships; local micro-meetups • Finance ecosystem: CDFI/CRA roundtables and homeownership pathways • Scholarship-to-workforce pipeline (internships, apprenticeships) 	<p>Threats</p> <ul style="list-style-type: none"> • Funding volatility; agency staffing churn; compliance headwinds • Remote-market pricing and limited procurement options • Turnover and lack of local building codes stall projects

Across interviews, members consistently framed SWTHA’s **core strength** as the network itself: tri-annual and monthly convenings that make it easy to “meet people, figure out who’s doing what, and learn by example,” which translates into practical, near-term problem-solving back home. That same peer-to-peer value is exactly what associates want to lean into: several asked to be used more deliberately as content partners (e.g., quick “teach-ins” on procurement, materials pricing, or resilience basics) rather than just vendors at tables.

The **weaknesses** raised most often were participation and clarity issues: some programs can’t reliably send staff because of HR or travel rules (one example: probation periods that block travel for months, which undermines continuity of learning and quorum); and several respondents struggled to gauge SWTHA’s advocacy “effectiveness,” not because advocacy isn’t happening, but because the line of sight from Region VIII priorities to national wins isn’t always visible to members. Interviewees also flagged leadership transitions: newer tribal leaders sometimes come in without grounding in HUD/NAHASDA rules, and some communities still lack basic building codes—both of which slow projects and complicate compliance.

On the **opportunity** side, both members and associates called for a vetted **resource directory** (contractors, trainers, lenders, templates) to counter rural price-gouging and shorten the “who do we call?” cycle. Associates invited SWTHA to schedule short, structured content slots during meetings (e.g., “10-minute teach-ins,” or sponsor-a-lunch with a practical mini-training) so their expertise can be used in service of member priorities without overpowering agendas.

The **threats** members worry about are largely external capacity constraints and compliance headwinds: ONAP staff churn slows answers and technical assistance; price volatility and

limited procurement options in remote markets raise project costs; and without codes and consistent leadership education, even “funded” projects can stall.

PESTLE Synthesis (Planning Session + Interviews)

<p>Political</p> <ul style="list-style-type: none"> • Flux at HUD/SWONAP; need tribe-led, coordinated advocacy • Use intertribal councils and consultations to amplify needs 	<p>Economic</p> <ul style="list-style-type: none"> • Travel/time constraints; thin vendor markets; price volatility • Diversify SWTHA revenue; unlock CRA/CDFI capital for members 	<p>Social</p> <ul style="list-style-type: none"> • Leadership/ED turnover; onboarding and peer mentorship culture • Multi-generational goals: homeownership and trades workforce
<p>Technological</p> <ul style="list-style-type: none"> • Predictable comms stack: monthly digest + live knowledge hub • Light-touch help: GEMS/eLOCCS/IHP-APR office hours; hybrid access 	<p>Legal/Regulatory</p> <ul style="list-style-type: none"> • HOTMA/NSPIRE, BABA, procurement constraints • Lack of building codes and policy familiarity slow delivery 	<p>Environmental</p> <ul style="list-style-type: none"> • Environmental review bottlenecks; resilience planning needs • Risk-reduction training with partners to protect assets

Political. The regional and federal landscape is in flux—leadership changes at HUD/SWONAP created engagement gaps that members felt on the ground, while the planning team noted the upside of high-level opportunities (e.g., government-to-government consultation leverage, a regionally familiar HUD leader, and congressional engagement). Implication: SWTHA’s coordination function remains pivotal to keep Region VIII’s voice coherent and heard.

Economic. The deck flagged funding delays and formula constraints, alongside new revenue levers for SWTHA (training, sponsorships). Interviews added the everyday economics members face: limited local vendors and “predatory” rural pricing—hence the push for a vetted directory to set fair market expectations.

Social. Turnover among EDs and tribal leadership, plus uneven familiarity with housing law and governance among external partners, increases the value of onboarding and cross-training; planning notes also emphasized outreach to non-member programs in AZ/NM to widen the circle of practice. Interviews echoed the need for consistent, right-sized communications to keep boards and members bought in.

Technological. The convening surfaced needs for better tools: a region-wide resource guide/knowledge hub, clearer protocols for shared systems/data, and support for members still on basic accounting stacks—modernizing without overburdening small teams.

Legal. BABA, shifting compliance (and staffing losses at agencies), and uneven local code environments create friction; interviews underscored how lack of building codes and limited leadership familiarity with HUD rules impede timelines and quality.

Environmental. Environmental review changes and persistent bottlenecks, plus the need for stronger emergency management planning, were called out in the planning materials as ongoing external pressures on delivery.

Strategic Implications (flows into the four KPAs)

- **Communication, Outreach & Engagement.** Make visibility tangible: a quarterly e-newsletter + monthly “in-brief” that translates policy wins/losses into Region VIII impacts; pre-meeting outreach scripts to help members secure HR approvals; and a public, living resource hub that shortens the “find help” cycle.
- **Advocacy, Policy & Representation.** Stand up a leadership-onboarding series (“HUD/NAHASDA 101 for Councils & Boards”) and a model building-code starter pack—paired with an annual Region VIII policy brief—so local decision-makers remove self-imposed bottlenecks while SWTHA advances federal fixes.
- **Capacity Building & Workforce Development.** Program modular training that blends member-led best practices with **associate “micro-teach-ins”** (10-minute slots, office hours), prioritized to procurement, pricing, resilience, and compliance pain points surfaced in interviews.
- **Organizational Stability & Sustainability.** Convert convening value into durable infrastructure: formalize the vetted vendor/partner directory; schedule sponsor-anchored learning segments that add content (not just logos); and build simple success metrics (attendance, engagement, training completions) to demonstrate relevance and retain membership.

8) Strategic Goals and Objectives (2026–2029)

Goal 1: Communication, Outreach & Engagement

Definition: Increase SWTHA’s visibility, participation, and stakeholder engagement through consistent and culturally relevant communication.

Linked KPAs: KPA 1 (primary); supports KPAs 2–4.

Owner(s): Communications Subcommittee (Board).

Co-champions/Partners: State reps (AZ/NM/TX), Associate Council lead, NAIHC comms, HUD/SWONAP, AIPC/tribal councils.

Key Initiatives (full, consolidated list)

- **Redesign and update website by Q4 2025.**
- **Launch quarterly e-newsletter and monthly updates** (monthly Member Digest) with a **90/60/30-day** event-notice cadence.
- **Implement member outreach protocol pre-meetings** (call-downs, leader invitations, simple briefing packet).
- **Grow social media reach by 25% annually** (with culturally grounded content).
- **Host two (2) virtual listening sessions per year.**
- **Stand up the members-only Knowledge Hub:** live training calendar, resource library, vetted vendor/contractor directory, “who’s done what,” and **office-hours scheduling.**
- **Quarterly Tribal Leadership Housing Briefings** (30–45 min) and **direct leader invitations** to portions of tri-annual meetings.
- **State/regional micro-meetups** between tri-annuals and **monthly virtual office hours** (short drop-ins).

Outcome Metrics

- **Website live by Dec 31, 2025; ≤ 3 clicks** to top tasks (calendar, trainings, scholarships).
- **Comms cadence:** 4 e-newsletters/yr + 12 monthly updates; open rate ≥ 35%, CTR ≥ 7%; 100% events carry 90/60/30 notices.
- **Outreach protocol:** documented and used for 100% of meetings/trainings.
- **Social media:** +25% reach YoY; engagement rate ≥ 5%.
- **Listening sessions:** 2/yr; ≥ 40 unique participants/yr; satisfaction ≥ 4.3/5; ≥ 6 actionable insights logged/yr.
- **Knowledge Hub:** v1 live by Q2 FY26; ≥ 60 active entries by FY27; ≥ 30 member↔provider matches/yr.
- **Leadership briefings:** 4/yr; leaders/boards from ≥ 30 tribes reached annually.
- **Micro-meetups & office hours:** ≥ 4 meetups/yr; 10 office-hour sessions/yr; average satisfaction ≥ 4.3/5.

SMART Objectives

Obj ID	SMART Objective	Baseline	Target	Due	Lead	Partners	Budget/Source
G1-01	Redesign and launch SWTHA website with updated IA and content	Legacy site	New site live; ≤3-click nav to top tasks	Q4 FY25	Comms Chair	Web vendor	Sponsor + ops
G1-02	Produce 4 e-newsletters/yr and 12 monthly updates; meet ≥35% open, ≥7% CTR	Ad hoc	Cadence met; KPI thresholds met	Q1 FY26 launch; ongoing	Comms Lead	State reps	Comms sponsor
G1-03	Implement pre-meeting outreach protocol (100% compliance incl. 90/60/30 notices)	Informal	Protocol used for all events	Q1 FY26; ongoing	Outreach Captain	Board officers	Ops
G1-04	Increase social reach +25% YoY and sustain ≥5% engagement	FY25 actuals	+25% reach; ≥5% engagement	Annually FY26–FY28	Social Lead	Associate Council	In-kind/sponsor
G1-05	Host 2 virtual listening sessions/yr; publish summary + action items in 30 days	Irregular	2 sessions; summaries ≤30 days	Semiannual	Comms Chair	Partners TBD	Ops
G1-06	Launch Knowledge Hub v1 (calendar, library, vendor list, office hours)	None	Hub live; ≥30 entries	Q2 FY26	Hub Coordinator	Associate Council	Platform + sponsor
G1-07	Run Quarterly Tribal Leadership Briefings and direct leader invites at tri-annuals	Irregular	4 briefings/yr; ≥30 tribes reached	Q4 FY26; annual	Board Chair	AIPC/State partners	Sponsorship
G1-08	Deliver ≥4 state/regional micro-meetups/yr and 10 office-hour sessions/yr	Limited touchpoints	Meet volume + ≥4.3/5 satisfaction	Q4 FY26; annual	State Captains	Associates/NAIHC	Event sponsors

Goal 2: Advocacy, Policy & Representation

Definition: Serve as the unified voice for Region 8 tribal housing programs by proactively influencing housing policy through coordinated advocacy and partnerships.

Linked KPAs: KPA 2 (primary); supports KPAs 1 & 3.

Owner(s): Advocacy & Policy Subcommittee (Board), Executive Committee.

Co-champions/Partners: Tribal leaders/boards; **ITCA** and **APCG**; **NAIHC** (policy); HUD/SWONAP; AMERIND; state housing agencies; Associate Council; legal/technical partners.

Key Initiatives (full, consolidated list)

- **Update and distribute the SWTHA Position Paper annually.**
- **Ensure presence at three (3) key housing events yearly** (e.g., NAIHC Legislative Conference, AMERIND/Housing safety events, HUD/ONAP Region VIII convenings).
- **Collaborate with ITCA and APCG by 2026** (formal MOUs or recurring co-hosted briefings).
- **Create and share a quarterly Policy Watchlist** (plain-language briefs and action items).
- **Participate in at least one federal policy consultation annually.**
- Maintain a real-time **Advocacy Log** and issue **Outcomes Notes** after each Hill/agency/state touchpoint.
- Stand up a **Rapid-Response Letter Pool** (associates draft; tribes approve/sign) and **Hill-Day coaching** for first timers.
- Deliver **HUD/NAHASDA 101 for Councils & Boards** and provide a **Building Code Starter Pack** for communities without codes.

- Host **intertribal/state briefings** (with ITCA/APCG and state housing partners) to align messages before national events.

Outcome Metrics

- **1 Position Paper/year**; distribute to **100%** member programs within **14 days** of adoption; **≥ 35%** open rate on the digital brief.
- **3 key events/year** with **post-event Outcomes Notes** published within **10 business days**; **≥ 6** concrete follow-ups logged/year.
- **ITCA/APCG collaboration formalized by Q4 FY26**; **≥ 2** co-hosted briefings/year thereafter.
- **4 Policy Watchlists/year**; **≥ 35%** open rate, **≥ 7% CTR**.
- **≥ 1 federal consultation/year** with Region 8 priorities submitted in writing and logged.
- **≥ 12 Hill/agency meetings/year**; **≥ 8 joint letters/year**; **100%** of meetings logged; **4/4** quarterly Outcomes Notes.
- **12 leadership onboarding sessions/year** (HUD/NAHASDA 101); **≥ 8** communities adopt/update codes/ordinances by **FY28**.

SMART Objectives

Obj ID	SMART Objective	Baseline	Target	Due	Lead	Partners	Budget/Source
G2-01	Publish the Annual Position Paper ; distribute to all members within 14 days; brief at first meeting after release	Irregular	1 paper/yr; 100% distribution; briefing delivered	Q2 each FY	Policy Chair	Exec Committee	Ops/Sponsor
G2-02	Issue a Quarterly Policy Watchlist (plain-language briefs + actions)	Ad hoc	4 per year; ≥35% open; ≥7% CTR	Q1-Q4 each FY	Policy Analyst	Comms	Ops
G2-03	Implement Advocacy Log + Outcomes Notes ; log 100% of Hill/agency/state meetings	No unified log	100% logged; 4 Outcomes Notes/yr	Q1 FY26 start; ongoing	Policy Chair	Board Officers	Ops
G2-04	Ensure SWTHA presence at 3 key housing events/yr and publish outcomes within 10 business days	Varies	3 events/yr; outcomes ≤10 days	Annually	Delegation Lead	NAIHC/AMERIND/HUD	Sponsor/Travel
G2-05	Formalize collaboration with ITCA/APCG (MOU or equivalent) and co-host ≥2 briefings/yr	Informal ties	MOUs by Q4 FY26; 2 briefings/yr	Q4 FY26; annual	Board Chair	ITCA/APCG	Sponsor
G2-06	Participate in ≥1 federal consultation/yr with written Region 8 priorities submitted	Occasional	≥1/yr; submission logged	Annually	Policy Chair	Tribal Leaders	Ops
G2-07	Launch Rapid-Response Letter Pool & Hill-Day coaching ; file ≥8 letters/yr	Ad hoc letters	≥8 letters/yr; 2 coaching sessions/yr	Q3 FY26; annual	Advocacy Lead	Associates/NAIHC	Sponsor
G2-08	Deliver HUD/NAHASDA 101 + Building Code Starter Pack ; track ≥8 code adoptions/updates by FY28	No standard toolkit	12 trainings/yr; 8 adoptions by FY28	Q4 FY28	Training Lead	AMERIND/States	Grants/Sponsors

Goal 3: Capacity Building & Workforce Development

Definition: Deliver a comprehensive and culturally grounded training program that cultivates emerging and current housing professionals across the SWTHA region.

Linked KPAs: KPA 3 (primary); supports KPAs 1 & 2.

Owner(s): Training & Workforce Subcommittee (Board).

Co-champions/Partners: NAIHC T/TA, HUD/SWONAP, AMERIND, Native CDFIs/CRA banks, community colleges/trade programs, associate members, state housing partners.

Key Initiatives (full, consolidated list)

- **Establish a full-year training calendar by January annually** (publish by Jan 31 each year, rolling updates).
- **Integrate HUD and housing training into tri-annual meetings and webinars** (HOTMA/NSPIRE refreshers; procurement/compliance; development readiness).
- **Partner with TA providers for co-hosted trainings** (NAIHC, HUD/SWONAP, AMERIND, CDFIs, colleges, associates).
- **Increase scholarship applicants by 20% annually** and align scoring to trades/construction and housing careers.
- **Launch a leadership pipeline program by 2026** (emerging leaders + supervisor/ED tracks; culturally grounded practice and policy).
- **Run technical “office hours”** (GEMS/eLOCCS/IHP-APR; compliance Q&A) between meetings.
- **Deliver a Finance for Homeownership track** (credit repair → small dollar/bridge → Section 184 readiness) with CDFIs/CRA banks.
- **Stand up internships/shadowing (1 week–6 months)** with member programs and associates; pilot return-to-service MOUs tied to scholarships.
- **Lean-Team Ops mini-series** (time management, SOPs, project planning) tailored to small staffs.

Outcome Metrics

- **Calendar:** full-year schedule published by **Jan 31** each year; **≥ 18** sessions/yr; attendance **+20% YoY**; satisfaction **≥ 4.4/5**.
- **Integration:** **≥ 6** HUD/ONAP-aligned sessions/yr embedded in tri-annuals/webinars.
- **Partnerships:** **≥ 40%** of sessions co-hosted/co-taught with TA partners.
- **Scholarships:** applicants **+20% YoY**; **≥ 10** trades/housing awards/yr; **≥ 50%** recipients placed in internships/apprenticeships.
- **Leadership pipeline:** program launched by **Q4 FY26**; **≥ 25** cohort participants/yr; **80%** retention to completion.
- **Office hours:** **≥ 6** cycles/yr; **80%** of ticketed issues resolved within **30 days**.
- **Homeownership finance:** **≥ 3** CDFI/bank roundtables/yr; **100** households 184-ready by **FY28**.
- **Workforce:** **≥ 20** internships/yr by **FY27**; **≥ 50%** placed with TDHEs/partners.

SMART Objectives

Obj ID	SMART Objective	Baseline	Target	Due	Lead	Partners	Budget/Source
G3-01	Publish the full-year training calendar (with dates, hosts, modalities) by Jan 31 each year	Ad hoc	18+ sessions/yr; calendar live by Jan 31	Jan 31 annually	Training Chair	Hosts/Comms	Fees & sponsors
G3-02	Embed ≥6 HUD/ONAP-aligned trainings per year into tri-annuals/webinars (incl. HOTMA/NSPIRE)	Irregular	≥6/yr; avg rating ≥4.4/5	Q4 each FY	Compliance Lead	HUD/SWONAP/NAIHC	Grants/Sponsors
G3-03	Co-host ≥40% of sessions with TA partners (NAIHC, AMERIND, CDFIs, colleges, associates)	Limited	≥40% co-host rate	Q4 each FY	Partnerships Lead	TA providers	In-kind/Sponsors
G3-04	Grow scholarship applicants +20% YoY; award ≥10 trades/housing scholarships/yr; track placement	Varies	+20% apps; ≥10 awards; ≥50% placement	Q4 each FY	Scholarship Lead	Associates/Colleges	Scholarship fund
G3-05	Launch Leadership Pipeline (emerging + supervisor/ED tracks) with ≥25 participants/yr and 80% completion	Not started	Program live; ≥25/yr; 80% completion	Q4 FY26 launch; annual	Pipeline Director	Elders/NAIHC	Sponsors/Grants
G3-06	Operate 6 technical office-hour cycles/yr; resolve 80% tickets ≤30 days (GEMS/eLOCCS/IHP-APR)	Ad hoc	6 cycles; 80% ≤30 days	Q4 each FY	Tech TA Lead	HUD/SWONAP	Ops
G3-07	Run 3 finance roundtables/yr and move 100 households to 184-ready by FY28	Fragmented	3/yr; cumulative 100 HH by FY28	Q4 FY28	CDFI Liaison	CDFIs/Banks	Sponsors
G3-08	Place ≥20 internships/yr by FY27; pilot return-to-service MOUs with TDHEs/associates	Informal	20/yr; MOUs active	Q4 FY27	Workforce Lead	TDHEs/Associates	Program funds

Goal 4: Organizational Stability & Sustainability

Definition: Strengthen SWTHA’s governance, financial sustainability, and internal structure to support growth, accountability, and long-term regional impact.

Linked KPAs: KPA 4 (primary); supports KPAs 1–3.

Owner(s): Executive Committee + Finance & Development Subcommittee.

Co-champions/Partners: Communications, Advocacy/Policy, Training & Workforce Subcommittees; Associate Council; sponsors & philanthropy; auditor/CPA; legal counsel; state partners.

Key Initiatives (full, consolidated list)

- **Increase membership from 29→35 tribes and 14→20 associate members by 2026.**
- **Implement tiered membership dues based on NAHASDA/IHBG formula allocation by FY2026** (transparent policy + invoicing).
- **Form and activate at least three sub-committees by Q2 2025** (Communications; Advocacy & Policy; Training & Workforce; Finance & Development as needed).
- **Maintain annual compliance** with IRS and New Mexico nonprofit requirements (filings, registrations, board policies).
- **Submit at least one capacity-building grant annually** (e.g., operations, training infrastructure, workforce).

- **Develop a 3-year sustainability & fundraising strategy** (targets, revenue mix, reserves).
- **Formalize the Associate Member Program** (benefits, ethics, non-voting Associate Council seat, annual showcase/teach-ins).
- **Pilot a vendor affinity/royalty program** that directs proceeds to scholarships and training (with clear disclosures).
- **Stand up a quarterly finance dashboard** (revenue mix, training P&L, DSO/aging) and adopt a **reserve policy**.

Outcome Metrics

- **Membership growth:** 35 tribal members & 20 associates by **12/31/2026**; overall **+25% members** and **+30% associates** by **FY2028**; associate renewal **≥ 80%**.
- **Tiered dues:** policy adopted and implemented by **FY2026**; **100%** of invoices reflect tiers by **FY2027**.
- **Sub-committees:** **≥ 3** activated with charters by **Q2 2025**; **≥ 4** active by **FY2026**; **90%** of annual workplan deliverables met.
- **Compliance:** **100% on-time** IRS/NM filings; conflict-of-interest and whistleblower policies reviewed annually; clean audit/management letter (no material weaknesses).
- **Funding:** **≥ 1** capacity-building grant submitted each year; **≥ 1** awarded by **FY2027**.
- **Sustainability:** 3-year plan adopted by **Q2 FY2026**; revenue mix **≤ 40%** dependence on any single source by **FY2028**; training net margin **≥ 15%**; operating **reserves ≥ 6 months** by **FY2028**.
- **Operations:** finance dashboard live by **Q2 FY2026**; **DSO ≤ 45 days** by **FY2027**.

SMART Objectives

Obj ID	SMART Objective	Baseline	Target	Due	Lead	Partners	Budget/Source
G4-01	Grow membership from 29→35 tribes and 14→20 associates ; track renewal ≥80%	29 tribes; 14 associates	35 tribes; 20 associates; ≥80% renewal	12/31/26	Exec Committee	Comms; Associate Council	Dues; sponsors
G4-02	Adopt & implement tiered dues based on formula allocation; 100% tiered invoicing	Flat dues	Policy adopted (FY26); 100% invoices tiered (FY27)	06/30/2026 (adopt); 06/30/2027 (full)	Finance Chair	Treasurer; Legal	Ops
G4-03	Form & activate ≥3 sub-committees with charters and annual workplans	Informal groups	3 active by Q2 2025; 4 by FY26; 90% deliverables met	03/31/2025 (Q2)	Board Chair	Sub-committee leads	Ops
G4-04	Maintain 100% on-time compliance (IRS 990; NM filings; policy reviews)	Varies	100% on time; clean audit/letter	Annually	Treasurer	CPA/Auditor; Legal	Ops
G4-05	Submit ≥1 capacity-building grant/yr (ops, training infra, workforce); track awards	Ad hoc	≥1 submitted/yr; ≥1 award by FY27	Annual	Dev Lead	Philanthropy/State	Dev budget
G4-06	Adopt 3-year sustainability & fundraising strategy (targets, mix, reserves policy)	None	Plan adopted; targets set by stream	Q2 FY2026	Finance Chair	Exec Committee	Ops
G4-07	Formalize Associate Program (benefits, ethics, Council seat, showcase/teach-ins)	Informal	Program launched; ≥1 showcase/yr; ≥80% renewal	Q4 FY2026	Associate Council Chair	Associates	Program income
G4-08	Launch vendor affinity/royalty pilot ; direct proceeds to scholarships/training with disclosures	None	Pilot live; ≥2 partners signed	Q3 FY2026	Dev Lead	Vendors/Sponsors	Sponsor revenue
G4-09	Deploy finance dashboard & reserve policy ; reach DSO ≤45 days; reserves ≥6 months	Limited visibility	Dashboard Q2 FY26; DSO ≤45 (FY27); 6-mo reserves (FY28)	See targets	Treasurer	CPA; Ops	Ops & reserves plan

9) Goal-by-Goal Breakdown (Narratives)

Goal 1 — Communication, Outreach & Engagement

Context. Members want predictable, culturally grounded communication that increases visibility and makes participation easier. This goal folds together the website redesign, a quarterly e-newsletter with monthly updates, the 90/60/30 event-notice cadence, a members-only Knowledge Hub, direct invitations and briefings for tribal leadership, plus micro-meetups and virtual office hours to reduce travel barriers.

Phasing. Pre-work (Q4 FY25): complete the website redesign and information architecture so top tasks (calendar, trainings, scholarships) are ≤3 clicks. Year 1 (FY26): launch the monthly digest and quarterly newsletter, implement the pre-meeting outreach protocol, and ship Knowledge Hub v1 with the live training calendar, resource library, vendor/contractor list, “who’s done what,” and office-hour scheduling. Year 2 (FY27): scale content (associate “teach-ins,” case notes), run quarterly Tribal Leadership Housing Briefings, and expand micro-meetups. Year 3 (FY28): optimize with analytics, lock in a repeatable editorial calendar, and hand off to standing owners.

How initiatives interlock. The Hub is the backbone that powers the digest, social posts, and meeting invitations; listening sessions and office hours feed the content pipeline; leadership briefings and the 90/60/30 cadence convert awareness into attendance and quorum; micro-meetups surface local needs that flow back into training and advocacy.

Dependencies. Web vendor and email platform; defined content owners; Associate Council participation on the Hub; data/privacy policy for the directory.

Decision gates. Approve site Information Architecture (IA)¹ and style guide; adopt the Comms SOP (90/60/30 + outreach protocol); Hub v1 “go-live” checklist; Year-1 KPI review (open rates, attendance, Hub usage) before scaling in Year 2.

Goal 2 — Advocacy, Policy & Representation

Context. Region 8 needs a clear, tribe-led voice amid policy flux. This goal operationalizes advocacy through an Annual Position Paper, presence at three key events, collaboration with ITCA and APCG, a quarterly Policy Watchlist, participation in at least one federal consultation each year, and the tools that make advocacy visible: an Advocacy Log, Outcomes Notes, a Rapid-Response Letter Pool with Hill-day coaching, and leader-facing education (HUD/NAHASDA 101; Building Code Starter Pack).

¹ **IA = Information Architecture.**

It’s the site’s structure: sitemap, navigation, page types, and how content is grouped/tagged (e.g., Calendar → Training Detail; Knowledge Hub → Resource Library, Vendor Directory, “Who’s Done What,” Office Hours; Scholarships; News/Policy)

Phasing. Year 1 (FY26): publish the Position Paper and Watchlist, stand up the Advocacy Log and Outcomes Notes, ensure presence at three events, and participate in a federal consultation. Year 2 (FY27): formalize ITCA/APCG collaboration (MOUs or equivalent), stand up the Rapid-Response Letter Pool and coaching, and begin tracking code adoptions sparked by leader education. Year 3 (FY28): deepen consultations and congressional relationships, report cumulative wins/losses, and adjust the Paper/Watchlist cadence based on member priorities.

How initiatives interlock. Goal 1 channels carry the Paper/Watchlist and Outcomes Notes; Goal 3 trainings supply policy-relevant content (e.g., HOTMA/NSPIRE) while leader briefings from Goal 1 remove local bottlenecks (codes, governance). ITCA/APCG partnerships accelerate alignment before national events.

Dependencies. Tribal leader availability; MOUs with ITCA/APCG; associate/legal partners to draft letters; scheduling with HUD/SWONAP and congressional offices.

Decision gates. Board adoption of the Position Paper; letter-sign-off protocol for tribes; MOU execution with ITCA/APCG; quarterly check on Advocacy Log/outcomes before expanding commitments.

Goal 3 — Capacity Building & Workforce Development

Context. Programs operate with lean teams and high compliance demands. This goal delivers a comprehensive, culturally grounded training program: a full-year calendar posted each January, HUD/housing content embedded in tri-annuals and webinars, technical office hours (GEMS/eLOCCS/IHP-APR), a Lean-Team Ops series, a Finance for Homeownership track with CDFIs/CRA banks, a leadership pipeline (by 2026), more scholarship applicants each year, and a coordinated internships/shadowing network.

Phasing. Year 1 (FY26): publish the calendar, run core compliance tracks and office hours, co-host $\geq 40\%$ of sessions with TA partners, and align scholarship scoring to trades/housing careers. Year 2 (FY27): launch the leadership pipeline cohorts, expand internships and return-to-service MOUs, and hold recurring CDFI/bank roundtables. Year 3 (FY28): scale cohort size and placements, track households reaching Section 184 readiness, and refresh curricula from listening-session feedback.

How initiatives interlock. The calendar and Hub (Goal 1) centralize training access; finance roundtables feed the advocacy agenda (Goal 2) and produce measurable household outcomes; internships/scholarships strengthen organizational continuity (Goal 4) and expand instructor/mentor capacity for future training.

Dependencies. TA partners (NAIHC, HUD/SWONAP, AMERIND), CDFIs/financial institutions, colleges/trade programs, associate mentors; simple data-sharing to track outcomes (placements, 184 readiness).

Decision gates. Annual calendar sign-off each January; cohort selection rubric for the leadership pipeline; MOUs for internships/return-to-service; mid-year KPI review (attendance, satisfaction, placements) to refine Year-2/3 offerings.

Goal 4 — Organizational Stability & Sustainability

Context. To sustain impact, SWTHA needs stronger governance, diversified revenue, and clear operating rhythms. This goal grows membership (29→35 tribes; 14→20 associates by 2026), implements tiered dues by FY26, activates at least three sub-committees, ensures clean compliance, submits at least one capacity-building grant each year, adopts a three-year sustainability/fundraising strategy, formalizes the Associate Program, pilots a vendor affinity/royalty model, and deploys a finance dashboard with a reserve policy.

Phasing. Year 1 (FY26): adopt tiered dues, activate sub-committees with charters/workplans, formalize the Associate Program, submit a capacity-building grant, and approve the sustainability plan. Year 2 (FY27): deploy the finance dashboard, drive DSO to ≤ 45 days, and advance reserve accumulation; expand associate renewal and sponsorship tiers. Year 3 (FY28): achieve six-month operating reserves, rebalance revenue mix ($\leq 40\%$ from any one source), and evaluate the affinity/royalty pilot for scale or sunset.

How initiatives interlock. Predictable revenue and reserves underpin training delivery (Goal 3) and travel/presence for advocacy (Goal 2). The Associate Program supplies instructors, sponsors, and directory entries that enrich the Hub and communications (Goal 1). Sub-committees become the standing “owners” for each goal’s execution.

Dependencies. Board votes on dues, reserve policy, and sustainability plan; CPA/auditor support; legal review for affinity/royalty agreements; sponsor market and member outreach capacity.

Decision gates. Dues policy adoption and invoicing readiness; reserve policy approval; Associate Program charter; annual audit/management letter; pilot evaluation for the affinity program before expansion.

10) Immediate Priorities (FY2026)

FY2026 Priorities

- **Governance & Backbone in Place.** Activate ≥ 3 sub-committees with charters/workplans; adopt the Comms SOP (monthly digest + quarterly e-news + 90/60/30 notices + pre-meeting outreach protocol); assign owners for Website/Hub/Advocacy/Training; stand up the compliance calendar; scope tiered-dues policy and 3-year sustainability/fundraising plan; define finance-dashboard & reserve-policy requirements; identify one capacity-building grant to submit early FY26.
- **Comms & Platform Pre-Work.** Approve **site IA & style guide** and kick off the Q4 2025 web rebuild; design **Knowledge Hub v1** (taxonomy, intake forms, vendor directory fields) and open content intake; draft the 2026 editorial calendar; schedule **2 virtual listening sessions** and at least **1 micro-meetup** to feed the Hub and Q1 FY26 digest.
- **Advocacy & Training Kickstart.** Draft the **2026 Position Paper** outline and **Policy Watchlist** template; launch the **Advocacy Log** and “Outcomes Notes” format; confirm SWTHA presence at **3 key 2026 events** and begin **ITCA/APCG** collaboration scoping; pre-build the **full-year 2026 training calendar** (embed HOTMA/NSPIRE + office hours); align scholarship scoring to trades/housing; draft the **Leadership Pipeline** curriculum and invite partner TA providers/CDFIs for co-hosted sessions.

11) Long-Term Initiatives (FY2026–FY2029)

This section highlights multi-year workstreams that extend past FY2026. Each initiative notes what scales in Years 2–3, how it’s funded, and the key dependencies/decision gates.

1) Region 8 Housing Finance & Homeownership Ecosystem (mixed funding)

What it is. A standing pipeline that moves households from credit readiness → small-dollar/bridge products → Section 184 and other mortgage options, while aligning down-payment assistance and counseling.

Year 2 (FY26–FY27). Formalize roundtables into MOUs with Native CDFIs, CRA-motivated banks, and counseling providers; stand up a shared intake/referral form; pilot a pooled down-payment or revolving micro-loan fund seeded by sponsors/philanthropy.

Year 3 (FY27–FY28). Scale lender coverage across AZ/NM/TX; track time-to-close and 184-ready households; publish an annual scorecard.

Funding. Bank CRA commitments, CDFI participation fees, sponsorships, capacity-building grants.

Dependencies. Partner MOUs; privacy/data-share consents; counseling capacity.

Decision gates. Pool design approval; underwriting/eligibility policy; annual renewal of partner commitments.

2) Leadership Pipeline & Workforce Academy

What it is. Two tracks—Emerging Leaders and Supervisor/ED—that blend culturally grounded leadership, governance, and housing practice with mentorship and a practicum.

Year 2. Launch cohorts; embed practicum placements with TDHEs/associates; align scholarships to cohort themes.

Year 3. Expand cohort size; add specialty strands (development finance, maintenance ops, compliance).

Funding. Scholarships, sponsorships, workforce grants, tuition-like fees for non-members.

Dependencies. Mentor bench, practicum MOUs, faculty roster.

Decision gates. Curriculum and selection rubric approval; annual cohort size and cost recovery review.

3) Knowledge Hub 2.0 (systems upgrade)

What it is. Phase-in of the members-only portal from a searchable library to a lightweight platform for cases, tools, vendor directory, and office hours.

Year 2. Add authenticated access, full-text search/tags, case templates, and a vendor verification workflow; integrate event registration.

Year 3. Layer in a lightweight LMS (modules, quizzes, certificates), analytics dashboards, and CRM sync (single sign-on).

Funding. Capacity grants, program income (training fees), sponsorship of topic “stacks.”

Dependencies. Finalized taxonomy; content owners; privacy/terms and directory ethics policy.

Decision gates. Tech stack selection; data governance policy; go/no-go after a security/accessibility review.

4) Associate Program 2.0 + Vendor Affinity/Royalty Pilot

What it is. A formal engagement and ethics framework plus a revenue-sharing pilot with vetted vendors to fund scholarships/training.

Year 2. Launch non-voting Associate Council seat; standardize benefits (teach-ins, showcases); sign 1–2 affinity pilots with disclosures.

Year 3. Scale partners based on impact and member satisfaction; publish an annual transparency report.

Funding. Royalty/affinity revenue, sponsorship tiers.

Dependencies. Ethics/COI guardrails; legal review of terms; vendor due diligence.

Decision gates. Program charter; pilot evaluation (renew/scale/sunset).

5) Intertribal & State Partnerships (ITCA, APCG, state housing agencies)

What it is. Formal collaboration to align Region 8 advocacy briefs and co-host trainings.

Year 2. Execute MOUs; schedule 2+ joint briefings; synchronize calendars before national events.

Year 3. Produce joint position memos and a shared training certificate (reciprocal credit).

Funding. Co-sponsorships, pooled event costs, state TA support.

Dependencies. MOU terms, shared messaging protocols.

Decision gates. MOU approval; annual joint workplan sign-off.

6) Codes & Compliance Modernization (regional support)

What it is. A practical path for communities without current building codes and for leadership onboarding on HUD/NAHASDA.

Year 2. Provide a “starter pack,” legal/technical office hours, and peer examples; help councils adopt or update codes.

Year 3. Stand up a regional inspector/plan-review co-op model or shared services roster; integrate AMERIND risk-reduction modules.

Funding. AMERIND co-training, state/PHMSA/mitigation grants (where eligible), membership fees.

Dependencies. Legal counsel availability; leadership participation.

Decision gates. Local adoption calendars; inter-tribal cost-share model approval.

7) Data & Systems Modernization (CRM, comms, finance dashboards)

What it is. Replacement and integration of core back-office systems that support comms, events, advocacy, and finance.

Year 2. Select and implement CRM + email automation; connect to website forms and the Knowledge Hub; deploy the finance dashboard (revenue mix, training P&L, DSO).

Year 3. Optimize automation (renewal notices, segmentation), add survey/pulse tools, and finalize the reserve-policy reporting cadence.

Funding. Capacity-building grants, in-kind vendor discounts, program income.

Dependencies. Data migration plan; role-based access; training for staff/volunteers.

Decision gates. CRM/vendor selection; data retention and privacy policy; dashboard metric set sign-off.

8) Regional Training Consortium & Credentialing

What it is. A formal consortium with TA providers (NAIHC, HUD/SWONAP, AMERIND, colleges) to co-brand and credential core competencies.

Year 2. Agree on a master calendar and credit mapping; publish competency rubrics and reciprocity rules.

Year 3. Issue micro-credentials (badges/certificates) recognized across partners; tie completion to leadership pipeline and HR progression.

Funding. Co-host fees, sponsorships, micro-credential fees.

Dependencies. Rubric alignment; registrar function; digital badge provider.

Decision gates. Consortium MoU; credential framework approval.

Cross-initiative dependencies & sequencing

- **Website/Hub (Goal 1)** must launch before Hub 2.0, CRM integration, and credentialing (Goals 3–4).
- **Tiered dues & sustainability plan (Goal 4)** should be approved before scaling affinity pilots and multi-year tech contracts.
- **ITCA/APCG MOUs (Goal 2)** should be in place before joint briefings and shared certificates.
- **Leadership Pipeline (Goal 3)** relies on the Associate Program 2.0 (mentors/practica) and the Training Consortium for credential value.

Year-end decision review (each FY)

1. **Impact check:** Did the initiative meet its annual KPIs (e.g., commitments secured, cohorts graduated, code adoptions, system uptime/usage)?
2. **Cost/revenue check:** Are we on plan for reserves, revenue mix, and program margins?
3. **Scale or pivot:** Approve the next-year scope or sunset pilots that do not meet member value or ethics thresholds.

12) Proposed Funding & Resource Alignment

Initiative	FY2025	FY2026	FY2027	Total	Funding Source(s)	In-Kind/Partners
Website redesign & launch (Goal 1)	\$25,000	\$3,000	\$3,000	\$31,000	Sponsors; Ops	Web vendor
Knowledge Hub v1: build + content intake (Goal 1)	\$25,000	\$8,000	\$8,000	\$41,000	Capacity grant; Sponsors	Associates (content); Member SMEs
Comms cadence (e-news, monthly update, social) + SOP (Goal 1)	\$18,000	\$22,000	\$22,000	\$62,000	Ops; Sponsors	Comms volunteers; State reps
Leadership briefings, listening sessions, micro-meetups (Goal 1)	\$6,000	\$8,000	\$8,000	\$22,000	Ops; Sponsors	AIPC/tribal councils; Hosts
Advocacy engine: Position Paper, Watchlist, Log & Outcomes Notes (Goal 2)	\$8,000	\$10,000	\$10,000	\$28,000	Ops; Sponsors	Policy advisors (pro bono)
National presence: 3 key events & federal consultation (Goal 2)	\$2,000	\$18,000	\$18,000	\$38,000	Sponsors; Travel scholarships	NAIHC; HUD/SWONAP; AMERIND
Rapid-response letter pool & Hill-day coaching (Goal 2)	\$0	\$7,000	\$7,000	\$14,000	Sponsors	Legal/technical associates
Training program delivery (calendar, embeds, office hours) (Goal 3)	\$30,000	\$45,000	\$50,000	\$125,000	Training fees; Sponsors	TA providers (NAIHC, HUD, AMERIND)
Leadership Pipeline (design → launch → scale) (Goal 3)	\$10,000	\$35,000	\$50,000	\$95,000	Grants; Sponsors	Mentors; Colleges; Associates
Scholarships (trades/housing) & internship stipends (Goal 3)	\$15,000	\$20,000	\$25,000	\$60,000	Scholarship fund; Sponsors	Employers; CDFIs
Systems: CRM + email automation + finance dashboard (Goal 4)	\$8,000	\$30,000	\$12,000	\$50,000	Capacity grant; Ops	Implementation partner
Governance & finance (tiered dues, reserve policy, audit/compliance) (Goal 4)	\$10,000	\$8,000	\$8,000	\$26,000	Ops	CPA/Auditor; Legal
Associate Program 2.0 & vendor affinity pilot (Goal 4)	\$3,000	\$6,000	\$6,000	\$15,000	Program income; Sponsors	Associates; Vendors
Capacity-building grant development (Goal 4)	\$7,000	\$7,000	\$7,000	\$21,000	Ops (reimbursable)	Philanthropy/state TA
ITCA/APCG collaboration (MOUs & joint briefings) (Goal 2)	\$2,000	\$5,000	\$5,000	\$12,000	Co-sponsors	ITCA; APCG; State Hsg
Totals	\$169,000	\$232,000	\$239,000	\$640,000		

Grant/Partner Pipeline (indicative)

- **Capacity-building/Systems:** state philanthropy, community foundations, tribal support funds (for CRM/Hub and training infrastructure).
- **Workforce/Leadership:** workforce boards, tribal education funds, employer partners (internship stipends, cohort scholarships).
- **Homeownership/Finance:** CRA-motivated banks, Native CDFIs (roundtables, counseling, micro-loan pilots), sponsorships tied to training events.
- **Advocacy/Presence:** event co-sponsorships (NAIHC, AMERIND), travel scholarships, joint briefings (ITCA/APCG).

Staff/Consultant Needs (lightweight, scalable)

- **Comms contractor (0.2–0.3 FTE):** editorial calendar, monthly update, quarterly e-news, social.
- **Policy analyst (contract/retainer):** Position Paper, Policy Watchlist, Advocacy Log/Outcomes Notes.
- **Training coordinator (0.3–0.5 FTE):** calendar, faculty/host wrangling, office hours, evaluations.
- **Systems implementer (project-based, FY26):** CRM/email, Hub 2.0 integration, finance dashboard.
- **Grant developer (project/retainer):** capacity-building proposals, reports.

Scholarship Program Alignment

- Prioritize **trades/construction and housing professions**, with optional **return-to-service MOUs** to member programs.
- Track outcomes (placements, certifications) and allow **associate-funded named awards** to expand impact.
- Coordinate with the **Leadership Pipeline** to offer cohort-linked scholarships and internship placements.

13) Monitoring, Evaluation, and Reporting

What the Scorecard Is—and How to Use It

The SWTHA Scorecard is the organization’s single view of performance against this strategic plan. It translates the four Goals (Communication & Engagement; Advocacy & Policy; Capacity & Workforce; Organizational Stability & Sustainability) into a small set of measurable indicators with clear owners, update frequency, and annual targets. Each row in the scorecard tracks a **Key Performance Indicator (KPI)** that matters to members (e.g., training satisfaction, leadership participation), to partners (e.g., presence at priority events), or to internal health (e.g., reserves, on-time filings).

Cadence & transparency

- **Quarterly performance check-ins.** The Executive Committee reviews this scorecard each quarter; variances >10% trigger corrective actions logged in the minutes and reflected in the next quarter's plan.
- **Annual plan review & refresh.** Each Q4, the Board reviews KPI performance, member feedback, and budget, then approves a light refresh to goals, targets, or owners for the next year.
- **Transparency practices.** A public-facing **KPI dashboard** and brief **Outcomes Notes** are posted quarterly on the website/Knowledge Hub, so members see what was done, what changed, and what's next.

Monitoring, Evaluation, and Reporting - Scorecard								
KPI	Definition	Frequency	Data Source	Baseline	2025	2026	2027	Owner
[G1] Email open rate	Avg. open rate for monthly update + quarterly e-news	Quarterly	Email platform analytics	TBD	Launch	≥35%	≥35%	Comms Chair
[G1] Email click-through rate (CTR)	Avg. CTR on core calls-to-action	Quarterly	Email platform analytics	TBD	Launch	≥7%	≥7%	Comms Chair
[G1] 90/60/30 notice compliance	% of events with 90/60/30 comms sequence sent	Quarterly	Comms SOP tracker	—	100%	100%	100%	Comms Lead
[G1] Website launch	New site live, ≤3 clicks to top tasks	One-time	Site QV/LUX test	No	Yes	—	—	Comms Chair
[G1] Knowledge Hub entries	Count of live resources (library, vendor list, cases)	Quarterly	Hub analytics	0	0	30	60	Hub Coordinator
[G1] Matches brokered	Member ↔ provider matches closed via Hub	Quarterly	Hub/CRM	0	0	20	30	Hub Coordinator
[G1] Social reach growth	YoY increase in total reach across channels	Annual	Social analytics	FY25 actuals	Baseline	25%	25%	Social Lead
[G1] Listening sessions	Virtual listening sessions held per year	Semiannual	Session logs	0	0 (scheduled)	2	2	Comms Chair
[G1] Leadership briefings	Quarterly Tribal Leadership Housing Briefs delivered	Quarterly	Attendance logs	0	2	4	4	Board Chair
[G2] Position Paper	Annual Position Paper released & distributed (≤14 days)	Annual	Publication log	—	1	1	1	Policy Chair
[G2] Policy Watchlist	Quarterly plain-language policy briefs	Quarterly	Publication log	—	1	4	4	Policy Analyst
[G2] Presence at key events	National/state housing events attended	Annual	Travel/event reports	Varies	2	3	3	Delegation Lead
[G2] Federal consultations	Formal consultations participated in	Annual	Advocacy log	Varies	1	≥1	≥1	Policy Chair
[G2] Hill/agency meetings	Meetings logged with outcomes sent	Quarterly	Advocacy log	—	8	12	12	Policy Chair
[G2] Joint letters filed	Multi-party letters submitted	Quarterly	Advocacy log	—	4	8	8	Advocacy Lead
[G2] Intertribal/state briefings	Co-hosted briefings w/ ITCA/APCG/state	Semiannual	Event reports	0	1 (pilot)	≥2	≥2	Board Chair
[G2] Code adoptions/updates (cum.)	Communities adopting/updating building codes	Annual	Member reports	0	1	3	5	Training Lead
[G3] Trainings delivered	Count of sessions (calendar + embeds)	Quarterly	Registration data	Varies	12	≥18	≥18	Training Chair
[G3] Training satisfaction	Avg. rating across sessions (1-5)	Quarterly	Post-event surveys	—	4.3	≥4.4	≥4.4	Training Chair
[G3] Office hours cycles	Technical office-hour cycles completed	Quarterly	TA tracker	0	3	6	6	Tech TA Lead
[G3] 30-day resolution rate	% office-hour tickets resolved ≤30 days	Quarterly	TA tracker	—	70%	≥80%	≥80%	Tech TA Lead
[G3] Leadership pipeline	Cohort launched & participants/year	Annual	Program roster	0	Design	Launch; ≥25	≥25	Pipeline Director
[G3] Scholarships (apps growth)	YoY increase in scholarship applicants	Annual	Scholarship system	—	20%	20%	20%	Scholarship Lead
[G3] Scholarships awarded	Trades/housing awards per year	Annual	Scholarship system	Varies	10	≥10	≥10	Scholarship Lead
[G3] Internships placed	Internships matched with TDHEs/associates	Annual	Program tracker	Varies	10	15	≥20	Workforce Lead
[G3] 184-ready households (cum.)	Households deemed ready for Sec. 184	Quarterly	CDFI/bank partners	0	20	60	100	CDFI Liaison
[G4] Tribal members (count)	Active tribal members	Annual	CRM/dues	29	32	35	36	Exec Committee
[G4] Associate members (count)	Active associate members	Annual	CRM/dues	14	17	20	21	Associate Council Chair
[G4] Tiered dues adopted	Policy adopted & invoicing aligned	Annual	Board minutes/AR	No	Draft	Adopted	100% invoicing	Finance Chair
[G4] Training net margin	Net margin across paid trainings	Quarterly	Finance dashboard	—	10%	≥15%	≥15%	Treasurer
[G4] Months of reserves	Liquid operating reserves in months	Quarterly	Finance dashboard	TBD	3	4-5	≥6	Treasurer
[G4] DSO (days)	Days sales outstanding on receivables	Quarterly	Finance dashboard	TBD	60	50	≤45	Treasurer
[G4] On-time filings	IRS/NM filings and policy reviews on time	Annual	Compliance calendar	Varies	100%	100%	100%	Treasurer
[X] Quarterly check-ins completed	Scorecard review meetings held	Quarterly	Board agenda	—	4	4	4	Exec Committee
[X] Annual plan refresh	Annual review & update approved	Annual	Board minutes	—	✓	✓	✓	Exec Committee
[X] Transparency practices	Outcomes Notes & KPI dashboard published	Quarterly	Website/Hub	—	4	4	4	Comms + Policy

14) Governance, Compliance & Accountability

SWTHA’s long-standing governance, compliance, and meeting practices continue without change. The 2026–2029 plan rides those rhythms; the only additions below ensure the new initiatives (website/Hub, advocacy visibility, training pipeline, sustainability) move smoothly.

What continues (no change)

- **Structure:** Board, Executive Committee, and established committees (Communications; Advocacy & Policy; Training & Workforce; Finance & Development).
- **Cadence:** Tri-annual member meetings; Executive Committee monthly; committees monthly/as needed; Board quarterly.
- **Compliance:** IRS Form 990, New Mexico filings, annual audit/financial review, and annual policy reviews (COI, whistleblower, etc.) per the existing calendar.

What’s new for this plan (light touches)

- **Scorecard use:** Quarterly board check-ins using the Section 13 KPIs; brief public “Outcomes Notes” posted after each meeting.
- **Communications owners:** Name a Comms lead and **Hub Coordinator** to keep the monthly update, quarterly e-news, and Knowledge Hub on cadence.
- **Advocacy visibility:** Keep an **Advocacy Log** and send a 1-page **Outcomes Note** after Hill/agency/state touches.
- **Training rhythm:** Publish the **full-year training calendar by Jan 31** annually (rolling updates thereafter).
- **Financial management:** Adopt a simple **reserve policy** and deploy a **finance dashboard** (revenue mix, training P&L, DSO) reviewed quarterly.
- **Membership & partners:** Finalize **tiered dues** policy; refresh the **Associate Program** charter; pursue **ITCA/APCG** collaboration where beneficial.

Decision gates (only where needed)

1. **Website/Hub:** approve **Information Architecture & style guide** before build/migration.
2. **Finance:** approve **reserve policy** and **dashboard metrics** before reporting begins.
3. **Partnerships/Policy:** approve **tiered dues** and any **MOUs** (e.g., ITCA/APCG) prior to launch.

15) Communications & Engagement Plan

SWTHA will communicate clearly, consistently, and in a culturally grounded way so members can act on opportunities, leaders stay informed, and partners know how to help.

Who we're speaking with—and what they'll get

- **Member housing programs:** practical “what to do next” information on trainings, deadlines, resources, and peer examples.
- **Tribal leaders and boards:** brief summaries of why an issue matters now, what decisions are needed, and when.
- **Associate members and partners:** where their expertise can support trainings, advocacy, and workforce efforts—within our ethics guidelines.
- **Funders and sponsors:** concise evidence of reach and outcomes, and ways to underwrite member value.
- **Community and public:** accessible updates on progress, careers, and homeownership pathways.

Channels & cadence

Channel	Purpose	Cadence
Website (redesign by Q4 2025)	Front door to Calendar, Trainings, Scholarships, and Updates; mobile-friendly and accessible.	Updated weekly
Knowledge Hub (members-only)	Resource library, vendor directory, case examples, and office-hour sign-ups.	New items monthly
Newsletter	Deeper regional updates and upcoming opportunities.	Quarterly
Monthly Update	Two-page, action-oriented digest members can forward to leaders.	Monthly
Social media	Quick, shareable highlights of trainings, wins, and member stories.	2–3 posts/week
Leadership Briefings	30–45-minute virtual briefings for elected leaders/boards.	Quarterly
Listening Sessions	Member input to shape training and advocacy.	Twice/year
Conference sessions & tri-annual meetings	In-depth learning, showcases, and matchmaking.	As scheduled

For events and trainings, members receive three advance reminders—about **90, 60, and 30 days** before the date—plus a short reminder the week of the event.

Products we'll publish

- **Website** with clear navigation (no more than three clicks to key tasks).
- **Quarterly newsletter** and **monthly update** that link back to the website and Hub.
- **Annual Report** (4–6 pages) highlighting outcomes, stories, and a simple financial snapshot.
- **Session packets** (agendas, slides, one-pagers) for meetings and conferences.
- **Outcomes Notes** after major advocacy engagements and after each board meeting (what we asked, what happened, what's next).

Inclusion, accessibility, and privacy commitments

- **Plain language & inclusive visuals.** We write clearly and reflect the diversity of our member communities.
- **Accessibility.** Website and files follow current accessibility standards (e.g., readable text, alt text, captions).
- **Respect for culture.** We seek consent for photos, stories, and symbols and avoid misappropriation.
- **Privacy.** We do not sell member data. The vendor directory is provided for convenience; listing does not imply endorsement. Clear guidelines govern how associates share resources through SWTHA.

How we will measure and report

We will track a small set of indicators—newsletter opens and clicks, website and Hub use, event participation, training satisfaction, and advocacy touchpoints—and publish a short quarterly update on results. These indicators are summarized in the Scorecard (Section 13).

Three-year arc (at a glance)

- **Year 1:** Launch redesigned website; start the monthly update and quarterly newsletter; open the Knowledge Hub; pilot leadership briefings and two listening sessions.
- **Year 2:** Expand Hub content and registration features; increase local meetups; standardize partner “teach-ins.”
- **Year 3:** Add simple credentials/badges to trainings with partners and publish a concise Annual Report.

Members will always know where to go, what's happening next, and how to get help; leaders should have timely summaries; partners should see clear ways to contribute—openly and ethically.

16) Implementation Roadmap (36 Months)

Year	Anchor Milestones & Decision Gates (high level)
2026	Gate 1: Approve website Information Architecture & style guide → Launch redesigned website. Adopt Communications SOP (quarterly newsletter, monthly update, 90/60/30 notices). Stand up Advocacy Log & Outcomes Note format. Publish 2026 training calendar.
2027	Gate 2: Knowledge Hub v1 live (training calendar, resources, vendor directory, office hours). Gate 3: Adopt finance dashboard & reserve policy. Formalize ITCA/APCG collaboration. Issue Annual Position Paper & quarterly Policy Watchlists; attend 3 key events; participate in a federal consultation.
2028	Integrate CRM with website/Hub; expand Hub content and registration. Launch Leadership Pipeline cohorts. Evaluate associate affinity/royalty pilot. Publish Annual Report and complete scorecard-based plan refresh. Continue consultations and support code adoptions.

Who clears the gates (at a glance):

Executive Committee (gates), Communications (website/Hub/comms), Policy (advocacy products & partnerships), Finance (dashboard/reserves), Training (calendar & pipeline).

17) Risk Management & Mitigation

SWTHA manages risk the same way it manages the plan: openly, lightly, and with clear ownership. A short risk register sits behind this section and is reviewed alongside the Scorecard each quarter. Every item is rated for **likelihood** and **impact** (low / medium / high), assigned to an owner, and tied to a simple **trigger** that prompts action. When a trigger fires, the owner brings a brief corrective plan to the Executive Committee within ten business days; material changes (budget shifts, policy edits) go to the Board and are summarized in the public “Outcomes Notes.”

What could affect delivery. Most risks fall into seven buckets.

Financial: revenue shortfalls or timing gaps could slow delivery of the website/Hub or trainings. We limit this by diversifying income (tiered dues, training fees, sponsorships), keeping a reserve policy, and submitting at least one capacity-building grant each year. Early warnings are reserves dipping below target, training margins falling under 15 percent, or sponsor/dues receipts lagging plan.

Operational & Technology: delays to the website/Knowledge Hub or new systems (CRM, finance dashboard) would affect access and reporting. We prevent “build twice” by approving the information architecture and style guide before development, working in sprints with vendor

SLAs, and keeping core content live on the current site until launch. A missed sprint or a go-live slip over thirty days triggers review.

Legal & Privacy: the Hub/CRM will hold member contact information. Role-based access, a posted privacy policy, backups, and an incident response checklist reduce exposure, unusual access logs or a vendor security advisory triggers action.

Reputation & Governance: advocacy must remain tribe-led and free of vendor pressure. Mitigation includes a clear sign-off protocol for letters, conflict-of-interest and ethics rules for associates, and short Outcomes Notes after major engagements. Any member concern, unsigned letter, or media inquiry prompts an immediate alignment check.

Program & Compliance: shifting requirements (HOTMA, NSPIRE, BABA) can overwhelm small teams. SWTHA co-hosts targeted refreshers, runs technical office hours, and publishes quick guides; a stack of unresolved help-desk tickets over thirty days is our trigger to surge assistance.

Stakeholder & Partnership: momentum can slip if leadership turns over or external partners go quiet. Quarterly leadership briefings, forwardable summaries, and MOUs with ITCA/APCG and others keep people oriented; missed briefings or a lapsed MOU triggers outreach.

Environmental & Access: travel, weather, or emergencies can depress attendance. Hybrid formats, recordings, and micro-meetups provide continuity; cancellations or advisories trigger virtual pivots.

How this connects to the plan. Each mitigation is already embedded in the goals: reserves and dashboard (Goal 4), website/Hub cadence (Goal 1), advocacy protocols and partnerships (Goal 2), compliance trainings and office hours (Goal 3). The Scorecard provides the “early-warning system”: reserve levels, training margins, website launch status, Hub usage, letter/meeting counts, policy watch cadence, satisfaction scores, and on-time filings. If any indicator stays off-track for two quarters, the Executive Committee documents a corrective action and, when relevant, a budget reallocation or scope adjustment.

Transparency promise. Because this strategic plan is public, SWTHA will keep risk language plain and practical. We do not publish sensitive system details, but we do report the fact of a trigger, what was done, and what will change next. The intent is simple: protect the people and the work, learn quickly, and keep the region’s housing priorities moving.

18) Appendices — RFP Deliverables Archive

- A. Strategic Plan Work Plan (timeline & roles)**
- B. Stakeholder Interview Questions**
- C. Strategic Planning Meeting Presentation**
- D. Infographic**

Signatures

Board Chair: _____ Date: ____/____/____

Secretary: _____ Date: ____/____/____

Executive Leadership (if applicable): _____ Date: ____/____/____