



Strategic Plan

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This Plan

This plan was developed by Trellis in conjunction with Nicole Lance and Eric M. Bailey, Managing Partners of Extraordinary Balance, a consulting firm based in Phoenix, AZ. Research has shown that by developing this plan, Trellis staff and leadership have a much higher sense of ownership over the direction of the work and will exhibit significantly higher energy and passion toward achieving the outcomes. This ownership leads to more efficient use of time, more creative work output, and increased job satisfaction.

Extraordinary Balance is a learning organization. Our methods are rooted in years of research on organizational psychology, team dynamics, and neuroscience that weave together a unique experience unlike any other. With a focus on science and real-world application, our method appeals to people on both sides of the analytical / emotional continuum and delivers unmatched business results.

The Process

The strategic planning process is as important as the plan itself. The Extraordinary Balance team process is designed to teach participants how to understand themselves so that they can clearly communicate their purpose. It is designed to teach participants how to understand each other so that they can honestly listen to new ideas. It is designed to teach participants how to understand the process, so that they can be fully engaged in creating, sharing, and executing the strategic plan.

The Steps of Creating the Strategic Plan

1. Learn the Principles of Human Understanding™
2. Identify the Focus Areas
3. Define the Focus Areas
4. Create SMART SIYA* goals for each Focus Area (*Specific, Measurable, Attainable, and Timely - Seemingly Impossible Yet Achievable)
5. Identify high-impact, year-one action items in a separate action planning document

Intentionally absent from this Strategic Plan

We do not outline specific activities to accomplish. The strategic planning process is designed to outline the direction (the WHAT) and the motive (the WHY) to the team, not the process (the HOW). Understanding there are virtually infinite methods for accomplishing a given goal, we provide a strategic plan that will last for multiple years accompanied by an Action Plan to keep the organization moving forward.

Accompanying this document is the Action Plan. This document, built by Trellis staff with input from the Board, will provide opportunities for everyone to work to explore the ‘HOW’ from different angles.

The ROSE

Results Oriented Statement Exercise™

Making clear the Results we want as a team.

As Stephen Covey taught, it is crucially important to “begin with the end in mind.” This simple statement proves to be quite difficult for teams as they begin the goal-setting or strategic planning process. Typically, teams identify processes that they want to improve, or projects that they want to take on (or complete) and set their goals from there. With the ROSE (Results Oriented Statement Exercise), we are making clear the results that we want to achieve. This process helps identify the deeper purpose of the organization, rather than outline the tasks. This is important because teams that have a clear united understanding of purpose are more likely to have productive dialogue. Teams that do not have a clear understanding of purpose are more likely to have unproductive debate.

The ROSE is not a mission statement, it is a unified statement of purpose that is broad enough that every member of the team can see how their work can bring the team closer to achieving the result. Yet, the ROSE is not so specific that it serves as an edict on how any team member should do their job.

The process for developing the ROSE

Every member of the board and executive staff present in the Strategic Action Retreat had direct input on the ROSE. Everyone was given the following questions and the direction to write one or two sentences per question.

- Why now? / What is present in the external environment that makes right now the time to do something meaningful?
- Why us? / Why is Trellis uniquely positioned to do something meaningful right now?
- What new? / What would need to change for us to be wildly successful?
- Why? / How will our community benefit from our efforts?

The answers to these questions formed the first drafts of the ROSE. Through a process of innovation and collaboration, the entire group agreed upon the final version of the ROSE.

Trellis ROSE

There is an urgent need for safe, stable and affordable housing. Trellis has the expertise, commitment, capability, relationships, structure and reputation to deliver sustainable housing now. To be wildly successful, Trellis needs to boldly scale up capital, staff, training, systems and community awareness to increase production and lending. We will build diverse, thriving communities that provide opportunities for the development of generational wealth.

Focus Areas

Through a process of discovery and collaboration, the Trellis Team identified five key focus areas for the new strategic plan:

Marketing
Operational Capacity
Resource Development
Program Development
Governance

Marketing

Definition

Using robustly funding Marketing & Communication tactics, increase brand awareness to develop audiences including clients, realtors, banks, partners and donors through strategic outreach, advertising, social media, and community engagement (and #Proportunity)

Goals

1. Arboles's brand awareness is high enough that it is considered a "Top 3 Option" lender to 50% of potential Hispanic homebuying market in the Phoenix marketplace in 5 years
2. Trellis provides "Path to Home Ownership through Financial Literacy & Coaching" program to every student graduating from Maricopa Community Colleges
3. "Path to Home Ownership though Financial Literacy & Coaching" program provided as an employee benefit to 25% of targeted business in metro-Phoenix within 5 years

Operational Capacity

Definition

Trellis staff will understand the priorities and have what they need to execute their roles.

Goals

1. Staff report 90% having necessary resources to execute their roles.
2. Achieve sustainability ratio of 100% earned revenue funding for operational predictability
3. Staff achieve 80% of KPIs
4. Decrease time needed to generate funder reports by 25%.

Resource Development

Definition

Securing sustainable flexible and affordable funding sources

Goals

1. Arboles to generate an annual profit of \$500,000/year by 2025
2. Increase \$10,000 (neighborhood and community level) recurring donors by 50% annually through 2025
3. Increase Trellis net assets to \$50 million by 2025 (\$14M now)

Program Development

Definition

The creation of expertise and demand for our services in the area of housing, education, mortgage loan acquisition, and building of affordable housing

Goals

1. Increase number of homeowners in underserved communities by building 100 homes (20/yr.)
2. Increase number of Arboles mortgages to \$42M annually
3. Increase number of counseling clients by 20% annually
4. Increase number of Trellis mortgages by 300% focused on underserved communities
5. Increase number of apartment units by 100 (2-50-unit props)
 - a. That could convert to homeownership

Governance

Definition

Governance includes clarifying and defining the expectations, responsibilities, and engagement of the Board. The Board provides oversight and accountability for leadership adherence to the organizational core values.

Goals

1. 100% of Board members participate in at least four community outreach opportunities (including introductions, personal contacts, or other identified opportunities.)
2. Achieve 100% positive response to Board satisfaction survey every year.