



2025 – 2028 Strategic Plan

ACKNOWLEDGEMENTS

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Partners

City of Concord
Cabarrus County
Harmon Construction Services, LLC
PRESPRO Homes and Neighborhoods
Grounded Solutions Network
Prosperity Unlimited, Inc.

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NON-PROFIT LIFE CYCLE

To move from the growth to the maturity stage, a nonprofit must shift its focus from expanding services to stabilizing and sustaining operations. This phase requires the organization to reassess its internal systems, ensuring that key functions like human resources (HR), finance, and technology are optimized and capable of supporting long-term success. By refining these structures, the nonprofit can handle increased operational complexity and maintain its impact.

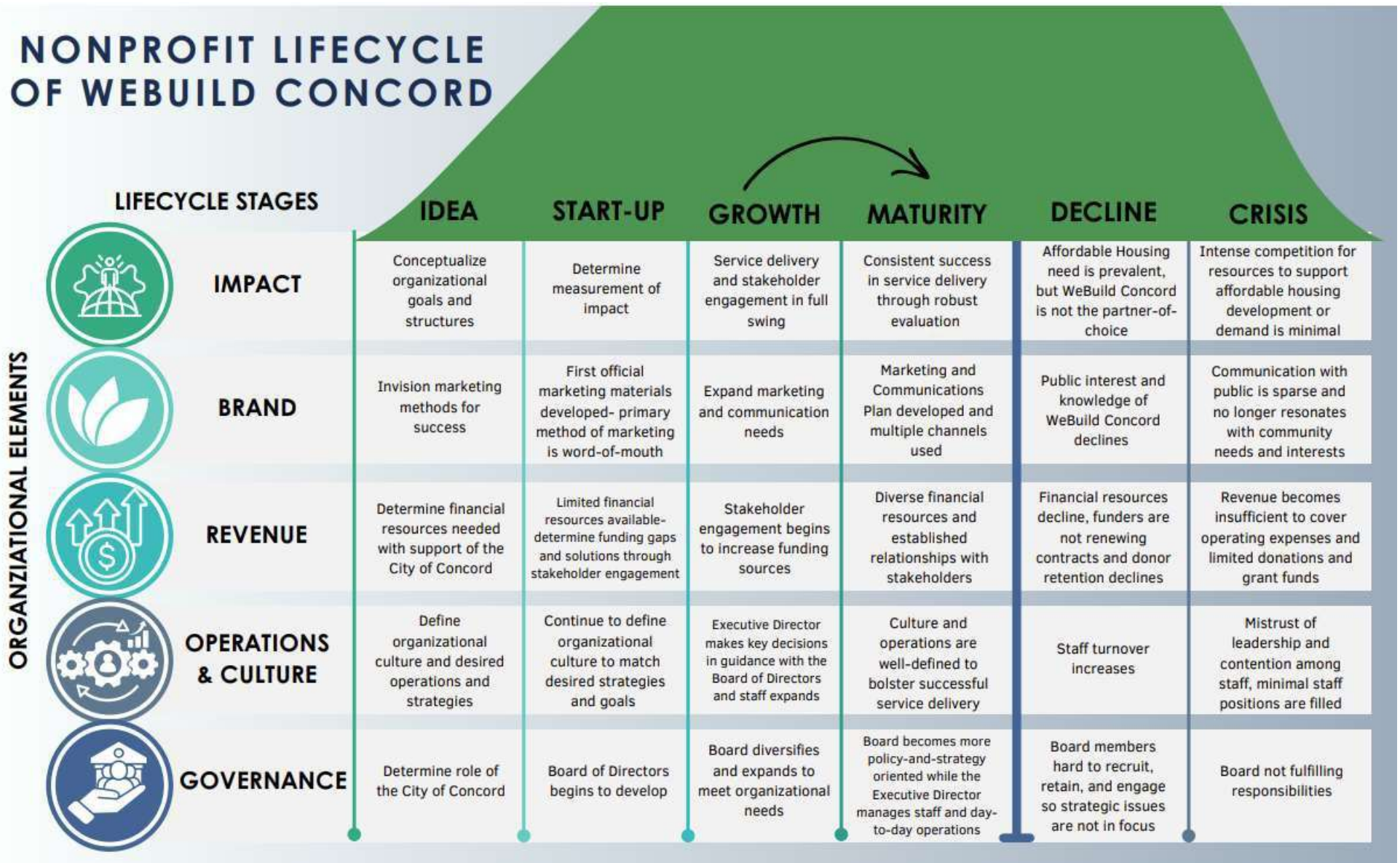
One essential step is capacity building. Nonprofits must establish standardized processes that are repeatable and manageable, ensuring efficiency across the organization. This involves creating robust HR policies, upgrading technological systems, and implementing financial oversight mechanisms. Additionally, organizations should focus on developing leadership to guide this transition, particularly board members who bring experience in navigating maturity stages.

Recognizing that WeBuild Concord serves as a steward of resources for the community, it is essential to embed “Stewardship” thinking into the internal and community capacity building tactics. Stewardship is a paradigm-shifting way to view the role of the board, staff, funders, and leadership. Understanding that the nonprofit is rooted in its ownership by the community helps break the boundaries of turf and fragmentation that may prevent sustainable impacts. By incorporating a stewardship lens in the evaluation process, nonprofits may better serve as community resource stewards.

Evaluation becomes a critical focus during this phase. Nonprofits need to implement systems for tracking programmatic and organizational outcomes. This helps ensure that the nonprofit’s mission is continuously aligned with its activities and that it can measure success over time. As part of this, nonprofits may need to invest in data collection and analysis tools, providing insights into their effectiveness and areas for improvement.

Finally, leadership alignment is crucial to success in the maturity stage. As nonprofits grow, leadership needs to balance strategic vision with operational excellence. This includes leaders who understand the mission and practicalities of running a sustainable organization. By prioritizing leadership development and strategic planning, nonprofits can secure their place in the maturity phase while continuing to effectively meet community needs.

The graphic below shows where WeBuild Concord aligns in the nonprofit life cycle.



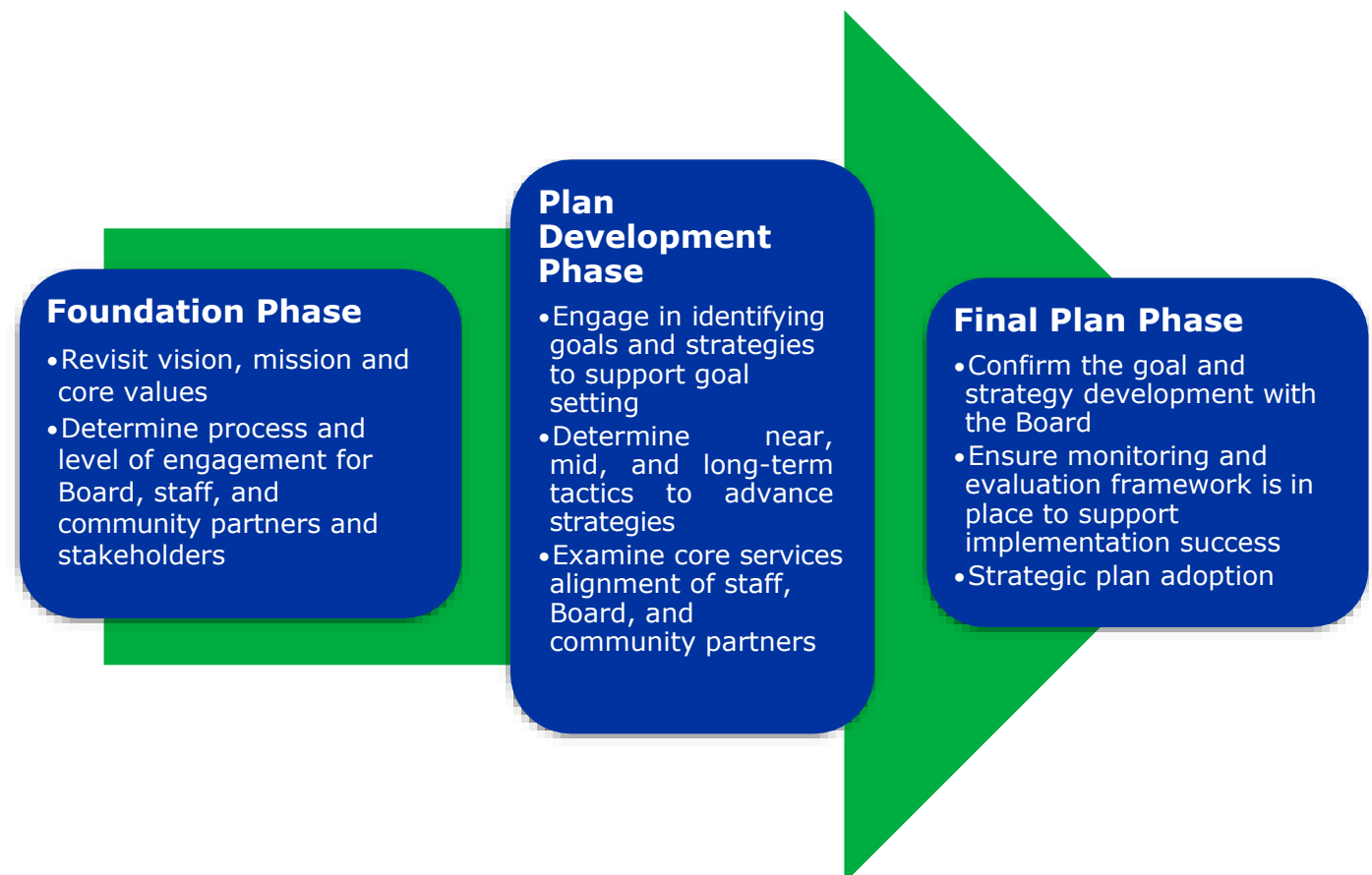
THE PLANNING PROCESS

During the summer and fall of 2024, Centralina Regional Council supported WeBuild Concord in developing a three-year strategic plan. Through this process, WeBuild accomplished the following:

- Examined the current state of WeBuild through an internal Board survey
- Engaged community stakeholders through two in-person focus groups
- Updated the organization's vision statement and reaffirmed the mission statement
- Set three-year goals and corresponding strategies to realize the vision

An internal Project Management Team (PMT) collaborated with Centralina on designing and executing the strategic planning process. The PMT, working in concert with the Centralina Strategic Plan team, engaged with the WeBuild Concord Board through several hours of strategic planning sessions, moving the process at a pace that felt comfortable and productive and ensured participation from all stakeholders. A complete list of meetings and engagements is outlined in Appendix A.

Figure 1 shows the sequential steps used to develop the strategic plan.



Foundation Phase: During the Foundation Phase, the PMT and Board participated in a survey to assess WeBuild Concord's existing strengths, weaknesses, opportunities to leverage, and threats to success. Through this exercise, they also reflected on WeBuild's current vision and mission statements and identified opportunities to revise them. Through interactive engagement activities, the PMT and Board reflected on the organization's current values and provided input on priorities to address in the strategic plan update. Also, during this phase, two Focus Groups were conducted to gather community stakeholder input into the vision for WeBuild Concord's future. The PMT and Board reviewed all the inputs and brainstormed concepts for an updated vision statement. They also affirmed the existing mission statement and core values. The PMT and Board reviewed and provided feedback throughout the development of the strategic plan foundations and prioritized issue areas to address in the next phase of the process.

Plan Development Phase: In the Plan Development Phase, the PMT, Board, and Focus Group inputs were organized around the prioritized issue areas. Through a series of interactive exercises, the Board developed concepts for goals and related strategies and considered short-, mid- and long-term timing for these concepts. The PMT and Board then reviewed the draft goals and strategies alongside WeBuild's core services. The feedback from this review was used to refine both the goals and the strategy and inform the monitoring and evaluation process to ensure successful implementation.

Final Plan Phase: In the Final Plan Phase, the Centralina team engaged with the PMT and Board on the goals and strategies and incorporated the feedback received. The WeBuild Concord PMT received the Strategic Plan on October 31, 2024 for future adoption by the Board.

STRATEGIC PLAN COMPONENTS

The WeBuild Concord strategic plan has the following components:

- Foundation:
 - *Vision: What we aspire to be in the future.* Communicates the long-term vision that the Board and staff are working towards.
 - *Mission: Why we exist.* Communicates what the Board and staff do in support of the vision and why it matters.

- *Core Values: How we will behave and act in executing the mission and pursuing the vision.* These values define organizational culture and must be lived, practiced, and assessed.
- Goals and Strategies Framework:
 - *Goals:* Specific goals to achieve the vision, typically broad and relevant for a multi-year period. Goals span across the organization's focus areas and can be achieved in many different ways.
 - *Strategies:* Strategies describe the specific mechanisms or components that help to achieve a goal. They may be multi-year and relate to specific program areas.

STRATEGIC PLAN FOUNDATION



Vision

To live in a community where attainable housing is safe, stable and part of our social and economic vision.

Mission

WeBuild Concord is a catalyst for building homes, partnerships, and opportunities that will ensure the stability and wealth of our residents.

Core Values

Stability

We enrich neighborhoods by providing affordable housing options for low to moderate-income households.

Connectivity

We foster relationships by listening, understanding, and empowering the voices of partners and residents.

Opportunity

We partner to ensure residents have quality homes that improve their ability to thrive and build wealth.

Respect

We promote pride and dignity in our community through high standards and thoughtful stewardship.

Equity

We affect change by building an inclusive future through housing.

Note: The core values were not discussed in this strategic planning process.

GOALS & STRATEGIES

GOAL 1: Tools to Develop Homes

Leverage existing tools and opportunities to increase the supply and affordability of housing options.

Strategies

Short-term

- 1.1. Continue participating in the Cabarrus Housing Collaborative and leading the Permanent Housing Committee to advocate for and provide housing stock and pathways to attainable housing.

Tactics

- a. *Explore unique ways to fund attainable housing development between private and public partners.*
 - b. *Establish firm policies and procedures for resident access to our homes.*
- 1.2. Implement new land acquisition and development approaches.

Tactics

- a. *Reexamine the Community Land Trust model to identify opportunities for enhancing and expanding its roles, such as ensuring legal representation for land trust actions and advocating for permanent, attainable housing policies at the local, state, and federal levels.*
 - b. *Explore a land banking model and approaches for preserving resources for nonprofit use to balance future purchases and fiscal management.*
- 1.3. Increase the number of families served.

Tactics

- a. *Expand mixed-use developments to balance the following: those below 80% AMI, those up to 120% AMI, and market rates to foster and enhance additional revenue funds. Discuss a 50/50 split between attainable and market rate units to create more funding for construction and mixed-income neighborhoods. This includes expanding marketing to identify the right affordable housing residents.*
 - b. *Leverage assets in support of enhancing banking finance needs.*
 - c. *Consider adjusting the 70/30 split between owned and rented units based on market demand while continuing to promote ownership to build wealth.*

Mid-term

- 1.4. *Build at least one sizeable rental development for public access and a consistent source of admin dollars to expand the mission*
- 1.5. Select affordable, sustainable materials and energy-efficient elements to reduce utility costs.

- 1.6. Explore local, state, and federal policies and ordinances that support attainable housing.
- 1.7. Embed homeownership education into the housing process to ensure sustainable affordability.

Tactics

- a. *Explore hiring additional staff to improve efficiencies in homeownership education.*
 - b. *Expand partnerships to address the volume of homeownership education requests.*
- 1.8. Consider leveraging best practices from other organizations for homeownership and home maintenance classes.

GOAL 2: Funding & Partnerships

Expand financial resources and collaborative partnerships to increase access to housing and supportive services

Strategies

Short-term

- 2.1. Identify new revenue streams and funding mechanisms to support staffing and operations.

Tactics

- a. *Pursue federal and state support for construction and infrastructure.*
 - b. *Identify private foundations for operating support and construction-related expenses.*
 - c. *Seek low-interest loans for specific housing projects.*
 - d. *Leverage private and social sector partnerships for shared costs with some housing developments.*
 - e. *Continue to expand the revolving construction fund concept.*
- 2.2. Strengthen partnerships with public and private entities.

Tactics

- a. *Collaborate with realtors to help address the misconception about price points and financing.*
 - b. *Pursue partnerships with larger banking institutions.*
 - c. *Partner with manufacturing companies to acquire more affordable materials.*

- d. *Continue to build relationships with elected officials from the City of Concord, Cabarrus County, and state and federal representatives from the Cabarrus area.*
- e. *Seek partners who understand and support the land trust and its success.*
- f. *Initiate partnerships with service providers to deliver pre-and post-purchase wrap-around services.*
- g. *Leverage partnerships to establish affordable, stable housing for teammates.*
- h. *Demonstrate leadership in housing initiatives and networks.*

Mid-term

- 2.3. Establish the organization as a trusted partner of local nonprofits.

Tactics

- a. *Pool resources with partners in Cabarrus County to advance common goals, such as the revolving construction fund.*
- b. *Provide training, guidance, and support to other organizations.*
- 2.4. Define the Board's local, regional, state, and federal policy and advocacy agenda.

GOAL 3: Internal Capacity & Human Capital

Strengthen organizational structure and operational capacity to advance our mission through board and staff development

Strategies

Short-term

As of fall of 2024, WeBuild Concord has doubled the organization's staff responsible for handling property management and development activities.

- 3.1. Continue increasing staffing level and capacity.

Tactics

- a. *Add at least two to three other staff roles in construction, marketing, and housing counseling.*
- b. *Bolster project management and program management areas.*
- c. *Identify opportunities to increase staff's experience and level of expertise.*

- 3.2. Expand and diversify the Board of Directors to ensure varied skillsets, subject matter expertise, and networks are represented.

Tactics

- a. *Seek board members who can support the organization with financial and legal matters and who are knowledgeable of innovative forms of capital.*
 - b. *Equip members of the Board of Directors with the tools needed to serve as WeBuild ambassadors among their networks.*
- 3.3. Clarify the Community Land Trust Advisory Board's purpose.
 - 3.4. Continue to expand on organizational planning activities.

Tactics

- a. *Conduct benchmarking analysis to see how WeBuild aligns with other entities.*
- b. *Consider the human element rather than operate solely as a business*
- c. *Incorporate stability as a measure of impact.*
- d. *Have comprehensive and integrated conversations from the top-down.*

Mid-term

- 3.5. Explore utilizing in-kind services from community members for marketing, accounting, auditing, and legal functions.
- 3.6. Consider establishing functional, task-specific Board subcommittees to guide strategic plan implementation.

Long-term

- 3.7. Assess the potential for term limits and staggered terms for Board members.
- 3.8. Conduct a stewardship self-assessment to use with the staff, board and partners, and embed the findings into metrics to evaluate progress.

GOAL 4: Marketing & Outreach

Broaden education and outreach activities to increase stakeholder and public understanding of WeBuild Concord

Strategies

Short-term

- 4.1. Create a mechanism for consistent marketing, including the development of a comprehensive marketing plan to proactively promote the organization via storytelling and bolster community partners for information sharing.

Tactics

- a. *Explore creating a full-time marketing and branding position.*
 - b. *Engage local organizations and individuals with close community ties.*
 - c. *Develop a toolkit to educate the community on WeBuild's role and approach.*
 - d. *Expand awareness of down payment assistance.*
 - e. *Utilize website, podcasts, social media, and community engagement as part of the WeBuild day-to-day activities and communication.*
 - f. *Identify where employees and others up to 80% AMI that earn \$60,000 or more work and live.*
- 4.2. Work with partners to develop education and messaging that increases understanding of affordable housing needs in the community.

Long-term

- 4.3. Develop a branding template that allows for consistent and streamline sharing of WeBuild information.

Tactics

- a. *Ensure the organization's name reflects the broader mission.*
- b. *Become a commonly known brand and inspire duplication of WeBuild practices.*

MONITORING & EVALUATION

Recommended Monitoring Approach

To provide oversight on Strategic Plan implementation, it is recommended that WeBuild use the following approach to monitoring over the three-year period. Monitoring is a tool for management and will be used by WeBuild's CEO to continually assess progress towards the plan strategies and ultimately goal completion. The main question assessed in monitoring is: did we do what we said we would do?

Monitoring Responsibilities: Ongoing throughout the year

- CEO & Staff: track and report progress on goal and strategy implementation; share successes with Board of Directors and Advisory Council.
- Board of Directors: provide guidance to CEO; share implementation progress with community stakeholders and the public.

Monitoring Steps

1. Track and collect data on the following:

- a. Implementation Progress of FY Tactics: #Completed; #In Progress; #Not Started.
- b. Impact Measures: collect data on established impact measures assigned to them.

2. Staff develops progress reports on a monthly basis. The following may be included in monthly reports:

- a. Number of FY Tactics Completed; In Progress; Not Started.
- b. “Success story” or “challenge”- short narrative to describe tactic progress.
- c. Quantitative report on impact measures metrics for reporting month and compared to prior month.

3. CEO uses monthly progress reports for staff engagement and performance management.

- a. Dashboard to track progress and engage the Board of Directors, staff, partners, and volunteers.
- b. Individual staff performance measures tied to organization’s goals.

4. CEO provides quarterly report to Board of Directors including:

- a. Number of FY Tactics Completed; In Progress; Not Started by reporting quarter.
- b. “Success story”- short narrative to describe tactic progress or completion
Recommend one per goal.
- c. Quantitative report on performance metrics for reporting quarter and compared to prior quarter.
- d. As needed, narrative on any guidance sought, decision points or challenges related to FY tactics implementation.

Recommended Evaluation Plan

A strategic plan evaluation can be conducted on an annual basis to assess the cumulative impact of the plan on the organization and identify what, if any, changes need to be made to respond to changing conditions. The evaluation is a tool for the Board of Directors and is an important component to establishing transparency and trust with the public. An evaluation can also identify success stories and challenges to overcome during implementation. The main questions to be assessed in plan evaluation are: what was the impact of the plan? What has changed at WeBuild because of it?

Evaluation Responsibilities: Annually

- Staff: assess progress and impacts; identify challenges.
- CEO: prepare and submit annual strategic plan evaluation for Board; recommend changes as needed.
- Board of Directors: evaluate plan progress; recommend and approve changes.

It is recommended that in the first implementation year of the Strategic Plan, WeBuild collect data on a set of initial impact measures to be used for the evaluation. As noted above, staff can regularly collect data on these indicators on a monthly basis as part of the monitoring approach (pending frequency of data availability). The table below includes preliminary measures WeBuild staff identified with the understanding that they will continue developing additional measures using the recommended framework in Appendix B.

GOAL	MEASURES
Tools to Develop Homes	<ul style="list-style-type: none">• Develop an average of 20-30 units for Years 1 - 3; minimum of 30 units per year by Years 4 - 5• Ensure non-segregated communities in our development based on income that ranges from at least 50-60% at 80% AMI and below, and 40-50% above 80% AMI
Funding & Partnerships	<ul style="list-style-type: none">• Increase in private and public foundation funding by 20% over the next two years• 2 grant applications per month or total grant requests exceeding \$25,000 per month• A minimum of one shared-costs partnership per year• Annual Breakfast and Other Events: 25% increase in funds raised or attendance
Internal Capacity & Human Capital	<ul style="list-style-type: none">• At least two learning opportunities for staff and Board per year (Impact of learning opportunities on performance of the organization)• Job and mission satisfaction• Resident participation on committees• A stability measure will be developed that serves as a guide for resident quality of life and future partner needs

Marketing & Outreach	20% increase in year 1-2 and 25% in years 3-4. <ul style="list-style-type: none"> • Website engagement • Constant Contact enrollment • Social media use • Media appearances
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After the initial round of data collection in year one, WeBuild may augment these impact measures with additional qualitative and/or quantitative data points.

Evaluation process includes the following steps:

1. Mid-Year Assessment

- a. Staff meets prior to the budget development process to review monitoring reports and assess conditions that may trigger a change to the plan. They determine if any changes to the Strategic Plan goals or strategies should be recommended to the Board. They would also identify tactics for the forthcoming fiscal year implementation plan development.
- b. CEO submits report to Board with recommendations on any changes to the Strategic Plan goals or strategies, as well as a recommended approach for tactics for the upcoming fiscal year.
- c. Board reviews the CEO's recommendations and makes a determination prior to the start of the budget process.

2. End of Fiscal Year Assessment

- a. Staff meets at the end of the fiscal year to produce an evaluation of fiscal year implementation plan success and accomplishments for the Board and external communication.
- b. CEO submits an Evaluation Report to the Board.
- c. Board reviews the Evaluation Report and determines if any changes to the Strategic Plan should be made since the mid-year progress report.
- d. WeBuild shares the Evaluation Report with the public.

CONCLUSION

The strategic plan provides a clear roadmap for guiding WeBuild Concord's work over the next three years. As next steps, WeBuild will need to identify measurements to track the progress on goals and strategies and decide how the organization will implement the strategic plan. Successful plan implementation will require continued engagement and collaboration between staff, the Board of Directors, the Advisory Council, community stakeholders, and key partners. Centralina is available to assist WeBuild with these next steps to keep up the momentum created during the planning process.

APPENDIX A: PROCESS TIMELINE

The table below outlines the meetings and activities that WeBuild leaders, staff, and community stakeholders participated in over the last several months to develop the strategic plan.

April 25	Advisory Council Briefing – Strategic Planning Process Overview
May 14	Board of Directors Meeting – Strategic Planning Process Overview
May 20 – May 31	Project Launch Survey
June 6	Project Management Team Meeting
June 18	Project Management Team Meeting
June 21	Board of Directors Work Session #1 – Strategic Foundations & Current State Assessment
July 9	Board of Directors Meeting – Strategic Planning Process Update
July 16	Community Focus Group #1
July 24	Community Focus Group #2
August 15	Project Management Team Meeting
September 10	Board of Directors Work Session #2 – Goal & Strategy Development
October 7	Project Management Team Meeting
November 12	Board of Directors Meeting – Strategic Plan Adoption

APPENDIX B: MEASUREMENT DEVELOPMENT

The table below contains key questions to help identify impact measures for strategic plan evaluation. It is recommended that a separate table be used for each of the plan's goals.

	[Goal]		
	<i>[Strategies]</i>		
<p>In the boxes to the right, list the top three things you could measure that would assess the <u>impact</u> of this goal.</p> <p>(NOTE: The measures should primarily align to the goal. Where feasible, you may also align the measures to the strategies.)</p>			
<p>What data points do you currently have access to related to this measure?</p>			
<p>Who collects the data?</p>			
<p>At what frequency?</p>			

