

HOUSING REDEFINED

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Career growth begins with you!

I am delighted to bring to fruition the career planning guide for INLIVIAN employees.

The career paths outlined in this guide are just one small element of career planning. What's important for you to remember is to think past your current job and take tactical steps to create a plan to get you on the right path. This begins, first, with understanding that your development is an essential aspect in preparing you for your next career step.

Many employees have not thought past their current job or the next promotion they'd like to receive. As employees are promoted up the organization chart, fewer jobs become available, yet continuing to grow skills and experience should still be a priority for people to add value to their career.

Planning is the foundation for any type of investment

Financial advisors are paid well to guide their investors. They customize investment plans by asking clients questions about their risk tolerance, budgets, dreams, and financial goals. Similarly, you need to ask yourself questions and think about "what if?" Once you've developed the answers to these introspective questions, develop a plan. It's okay to explore career opportunities that provide you with more financial security and prestige, but don't let those materialistic objectives be the basis for seeking advancement opportunities. The most successful people develop business plans around their passions. The drive they obtain from their passions is what gets them to reach their full potential.

The next segment of this guide focuses on five central opportunities for growth. Also, be sure to think about what you can take advantage of outside of work—perhaps at home, church or other networks in your community which may help you capitalize on opportunities for growth.

I've created this guide and offered the accompanying Career Planning Worksheet to facilitate your journey in growing at INLIVIAN. Please consider them an invitation to take ownership of your career.

Wishing you the best as you pursue personal excellence,

Sandy Pizarro, SPHR, SHRM-SCP, MBA EVP of Talent Operations

Opportunities for Career Growth

Professional Development

Investing in your professional development is easier than you think. Our organization prides itself on the course offerings of INLIVIAN. Professional development programs are at the fingertips of every employee regardless of whether you are a clerk or a senior executive. So, be sure to avail yourself of any learning opportunity that fits in with your plan and, most importantly, make sure you remind your leadership how much you appreciate their investment of time in you. Let's also not forget that INLIVIAN is one of just a handful of companies to still offer tuition reimbursement for coursework leading to a bachelor's or master's degree. It's easy to articulate the ROI (return on investment) to be gained from professional development—so be sure to message this frequently and deliberately.



Become a Flexible-Knowledge Worker through Lateral Moves

Don't underestimate the value of making lateral moves within an organization. Expanding your knowledge of key operational areas by performing the work of those functional areas could lead you to a career within INLIVIAN that requires broad-based knowledge of operations. Also, this generation of workers shouldn't expect job security the way our parents or grandparents experienced thirty-year careers with their employers.

Expanding your knowledge of our business, provides you with a greater opportunity to be recognized as a "rising star" with the ability to move to other areas of our organization in the unfortunate event of an economic downturn or reorganization of your department.

Job Shadowing

Another way to increase your value within an organization is to capitalize on job shadowing. This requires two things: 1) for your supervisor to be fully supportive of the time you take from your regular job to shadow someone and 2) a willing and competent individual to share their knowledge and time in explaining why they do what they do. Neither of these things is easy to obtain but taking the initiative to plan thoughtfully and purposefully with your manager, can help the two of you realize the benefits of shadowing.

For example, an accountant can shadow a compliance specialist and vice versa. Each one of those roles has regulatory knowledge, analytical tasks, and reporting duties. But, should the need arise for the accountant to perform auditing on an advanced level, he's had the benefit of shadowing an individual whose job is based on conducting frequent audits. Likewise, if the compliance specialist ever has a need to perform complicated formulas in Excel, she's had the benefit of shadowing an individual who works in Excel daily. As you see from this example,

not every shadowing opportunity is restricted to roles more advanced than yours. Shadowing should be focused on learning something new and determining what your next steps are in gaining the expertise needed to succeed in multiple jobs—perhaps even within your own department.

Seek a Mentor

Take the opportunity to seek a mentor who can share their experiences and maybe even open a



door to future opportunities within the organization. In fact, our organization requires students in the Leadership Academy to obtain a mentor as a condition of participating in the program. That said, don't hesitate to seek mentorship outside of a formal INLIVIAN program. Take the initiative to identify and seek the ideal mentor. Not only is it flattering to ask someone to be your mentor, but the long-term benefits of securing the right mentor are invaluable and, most importantly, free!

A mentor should be someone with whom you are comfortable sharing your struggles, dreams, and ambitions. Your mentor should also be a person you can trust to tell you the truth, especially if he or she thinks you've made a political misstep, are expressing entitlement or are misdirected. Your supervisor, no matter how wonderful they are, would not have the capacity to be frank and honest with you about behaviors that could be a detriment to your career goals. Your mentor, on the other hand, has the carte blanche, life experience and your permission to openly express their opinions.

Read, Read, Read!

In today's world, there is no excuse for not making the time to read—there are a plethora of tools and apps to make reading more convenient. While books are often expensive, we still have the wonderful benefit of public libraries and an occasional colleague who is more than willing to loan you a good read.

A person who won't read has no advantage over one who can't read. — Mark Twain

We read to know we are not alone. — C.S. Lewis

Our organization has multiple opportunities to join book discussions and even has an employeeled book club. There is no doubt that well-read individuals are viewed as well-rounded not only from the knowledge they gain from books but also because they usually possess advanced oral and written communication skills, analytical thinking and the ability to defend an opinion or debate thoughtfully. Book clubs are excellent opportunities for sharing your thoughts, gaining recognition for critical thinking and presentation skills and, most importantly, networking in a fun way with colleagues.

Helpful Tips for Growing Your Career



Set Goals

Much like an organization sets strategic goals and objectives, you too, must set goals and create a plan for achieving them. You need to proactively determine what you want from your work.



Develop a Timeline

Goals and objectives require timelines and setting up milestones. If you're not at the level where you've developed strategic plans, it is likely that you're aspiring to be in that type of role in the next five years. There is no better way of practicing goal setting than determining what your developmental needs are and what actions you need to take to achieve them.



Own Your Career

Take the initiative to have discussions focused on your career growth. At INLIVIAN, we have a deep commitment to our employees by assisting where possible with resources of time and dollars. Remember, however, that it is your career path.



Participate in our Employee Development Programs

As mentioned earlier, at INLIVIAN, there are many company-sponsored opportunities to support career development inclusive of acts of service in the community. I've been stumped by one thing in my twenty-year career as an HR professional—and that's been the lack of interest from employees in seeking out professional development when it is offered.



Work Hard

The business guru, Peter Drucker, once said that "plans are only good intentions unless they immediately degenerate into hard work". "Degenerate" means that your plan must transform itself into action. There are few people who arrive to the C-Suite without hard work and knowing their career trajectory. Your career plan may need an adjustment if you encounter some obstacles or opportunities. Regardless, without action, you have nothing but a plan.



Look Around You

INLIVIAN is intentionally undergoing a transformation to be a Learning Organization. Learning is occurring at all levels in the company and you will only be left behind if you choose to ignore the opportunities you've been granted. INLIVIAN understands the importance of training, assessing, and planning for succession. As such, we are currently launching several initiatives to underscore our commitment to the employee development process. Be aware and be ready for these initiatives.

Conclusion

Your career growth is ultimately yours to control and, if this is important to you, you'll take the next step of asking yourself the introspective questions that are relevant to the career planning process. Below is a Career Planning Worksheet I've adapted and simplified from the book, Fast Forward Your Career-7 Career Success Principles, by Richard E. Hinkle. Please utilize this version or refer to Hinkle's webpage: www.successfulcareerdecisions.com for a more detailed version.

Career Planning Worksheet

1.	What is the title of the position you most want to have, or be promoted to, next?					
2.	How soon would you like this change/promotion?					
3.	Do the decision-makers concerned with this position know who you are? Yes No					
4.	Do they know you are interested in this position? Yes No					
	If the answers to either of the questions is "no", you need to get better connected and noticed.					
	Find a mentor.					
	The person I will ask to be my mentor is:					
	Volunteer for the following task force or committee:					
	Get involved in the following industry organization:					
	Connect with the following peers outside my department:					
	\cdot Become a company-sponsored community volunteer in the following activity:					
	Share my career plan with:					
	🗆 Boss 🔲 Talent Operations 🔲 Coworkers 🔲 My Network					
_						
5.	Are you doing a great job where you are? List three things you need to do to improve your success in your current position.					
	1					
	2					
	3					
	List some "extras" that you do, or can do, to increase your "star" power beyond just meeting expectations.					
	1					
	2					

6. Self-awareness is important at all levels, but it is critical for anyone aspiring to work at the highest levels in an organization. Getting to know your personality traits, along with your thinking, and leadership styles, is part of becoming more self-aware.

What self-awareness tools have you used to understand yourself more deeply?

- · PXT
- Myers-Briggs or other personality trait assessment
- Received a 360 review
- Other: _____

What did you learn about yourself, and how might you want to change, to make an even more positive contribution in your career?

If you haven't done this type of self-analysis, what are you going to do about it, if anything?

What part of your next promotion will be especially difficult for you? (Consider workload, stress, impact on family, further development requirements.)

What is your motivation for this promotion?

7. How much do you know about our organization and your industry? Being well-rounded and having a strong business acumen are key to career growth.

Check off those tactics you have already used and underline the ones that you intend to use in the future.

- □ Research your company and your industry online.
- □ Have a conversation with leaders in other parts of the organization to learn what they do and how what you do relates to their success.
- □ Learn about your organization's culture.
- Attend seminars or seek formal education to learn knowledge or skills important to the overall organization to broaden yourself.
- Attend industry conferences or meetings.

8. Are you ready for the next level? Opportunities to advance won't wait for you to get ready.

What education, training, or experience do you need to become a stronger candidate for your next promotion?

Education	Training	Experience

Where can you get this added education, training or experience?

Whom have you selected as your potential replacement?

(It's hard to move on if you are indispensable in your current job.)

- · Specifically, what do you need to do to demonstrate your readiness for the next level?
- Wardrobe: What clothes do you need to wear to fit in?
- Work Schedule: Do you need to adjust your work habits? How?

Personal Improvement Areas:

Do you need to improve your grammar, speaking style, terminology, office organization, posture, or any other item that might not fit in well in a new, higher-level position? If so, what, specifically?

9. How strong are your leadership skills?

Whom do you consider effective leaders?

Why did you choose these people? What traits do they exhibit?

Now, think about your own leadership skills. What actions can you take to grow those skills?

- □ Take some risks, make an important decision.
- \Box Lead by example
- □ Engage others in finding solutions that affect their jobs.
- $\hfill\square$ Share the credit. Leaders raise up those on their team.
- □ Hang out with successful people. Ask for coaching.
- 10. What concerns would you have if you were offered a promotion into management, where your future success would depend upon team performance, rather than your own personal specialist or technical expertise?
 - 1. _____
 - 2. _____
 - 3. _____

11. What, if any, relationship problems do you have at work, and what can you do about them?

Next: Take this career worksheet and formulate your plan and action steps for your next career step at INLIVIAN.

To assist you in this endeavor, utilize the career paths we've outlined for you here at INLIVIAN. We've noted some key job attributes identified by INLIVIAN leaders in their searches for top talent. This is rich information that still needs to be augmented by your own curiosity and hard work towards achieving true career growth.

EXPLORE CAREER PATHS

Global Career Path Guide

	Administrative Functions (Various Departments) Aspire to Have Intradepartmental		
Administrative Support	 Strong work ethic Exemplary customer service skills Advanced oral & written skills Proficiency in Microsoft Office software and data entry 	N/A	 Executive Assistant HR Generalist Assistant Property Manager

	Finance		
	Aspire to Have	Intradepartmental	Interdepartmental
Accountant or Accounting Specialist	 Financial analysis High level communication skills Problem solving skills Attention to detail 	 Procurement Specialist Lead Accountant 	 Compliance Specialist (L) Asset Manager Project Manager
Procurement Specialist	 Knowledge of federal, state, and local procurement rules and regulations High level oral and written skills Advanced problems solving 	• Lead Accountant	 Compliance Specialist (L) Asset Manager Project Manager

	Talent Operations		
	Aspire to Have	Intradepartmental	Interdepartmental
HR Generalist or Specialist	 Detail-oriented, flexible, and decisive Sound judgement and problem solving skills Excellent communicaion skills Understanding of polices and regulations 	• Senior Leadership Role	 Data Analyst Project Manager Program Manager (ex. Volunterrism, Job- Readiness)

	Real Estate Development		
	Aspire to Have	Intradepartmental	Interdepartmental
Real Estate Development Professional	 Strong analytical and interpersonal skills Leadership abilities Detail-oriented, flexible, and decisive Sound business judgement 	• Senior Leadership Role	 Legal District Manager (L)
Acquisition & Relocation Specialist	 Strong financial analysis Policy driven Impeccable customer service Excellent communication skills 	N/A	 Assistant Property Manager (L) Case Manager (L) Project Manager

	Client Services		
	Aspire to Have	Intradepartmental	Interdepartmental
Case Manager or Case Coordinator	 Critical thinking Excellent customer service Ability to establish working relationships (interal and external) Tact and diplomacy, yet firm Policy driven Presentation skills Budgeting skills Awareness of c ommunity needs 	 Lead Case Manager Program Manager 	 Acquisition and Relocation Specialist (L) Assistant Property Manager (L) Property Manager

	Compliance		
	Aspire to Have	Intradepartmental	Interdepartmental
Compliance Specialist	 Excellent oral and written skills Ability to analyze data Presentation skills Comprehension of complex materials 	 Compliance Manager Lead Housing Specialist 	 Asset Manager Project Manager

	Housing Choice Voucher (HCV)		
	Aspire to Have	Intradepartmental	Interdepartmental
Housing Clerk	 Strong math skills Excellent time management Excellent customer service Confidence in leading Proficiency in MS Suite 	• Housing Specialist	 Receptionist Office Coordinator Leasing Agent
Housing Specialist	 Time and project management Advanced quality control Strong liasion skills (internal and external) Strong oral and written skills Accountability 	 Portability Specialist Lead Hosing Specialist Project Based Voucher Specialist (PBV) 	 Compliance Specialist (L) Asset Manager Project Manager
Lead Housing Spe- cialist	 Strong and positive leadership Impeccable quality monitoring and controls Solid presentation skills 	 HCV Manager (Various) 	 Assistant Property Manager/Property Manager Procurement Specialist Compliance Specialist
HCV Manager (Various)	 Strong financial analysis Impeccable quality monitoring and controls Solid presentation skills 	• Senior Leadership Role	 Specialized Management (ex. Compliance Manager, Asset Manager, Project Manager, etc.)

	Blue Horizon Management Company (BHMC)		
	Aspire to Have	Intradepartmental	Interdepartmental
Maintenance Technician	 Knowledge of mechanics and systems Multi-tasking Data Entry Excellent customer service 	 Maintenance Supervisor 	 Help Desk (L) Construction Management Property Manager Assistant Property Manager (L) Inspector (L)
Leasing Agent	 Strong math skills Time management Excellent customer service Confidence in leading Microsoft proficiency 	 Assistant Property Manager 	 Housing Specialist (L) Executive Assistant Case Manager
Assistant Property Manager	 Excellent time and project management Strong liaison skills (internal and external) 	Property Manager	 Compliance Specialist (L) Case Manager (L) Project Manager
Property Manager I & II	 Strong and positive leadership Impeccable quality monitorng and controls Strong oral and written skills Time management Excellent customer service 	 Floating Senior Property Manager District Manager 	• Project Manager
District Manager	 Critical thinking Strong financial analysis Solid business acumen Impeccable quality monitoring and controls Strong and positive leadership Excellent presentation skills 	 Senior Leadership Role 	Leadership Role in: • Compliance • Real Estate Development • Asset Management

Housing Choice Voucher Department



Housing Clerk

Entry level position Education: HS diploma Starting rate: \$15/hr

Housing Specialist, PBV Specialist, or Admissions Specialist

Minimum of two years' experience in office setting; demonstrated customer service acumen

Education: HS diploma; some college preferred

Starting rate: \$17.79/hr

Certifications needed: HCV Rental Calculation Specialist within 18 months of hire

Lead Housing Specialist

Minimum of three to five years of experience on a specialist level with mastery level knowledge of the specialist role; demonstrated experience in training others; demonstrated ability to manage projects and strong leadership acumen

Starting rate: \$21.63/hr or \$45K annualized

Manager

Minimum of three to five years in a leadership role; strong financial acumen and ability to manage multiple teams; bachelors degree preferred or equivalent of five to ten years of management experience

Starting rate: \$55K per year

Housing Choice Voucher Department

Areas of Potential Movement



Housing Clerk Next Step Opportunities:

- · Housing Specialist
- Receptionist
- · Leasing Agent

Aspire to have:

Strong math skills

Excellent time management

Impeccable customer service

Strong project management skills

Proficiency in MS software



Housing Specialist

Next Step Opportunities:

- · Portability Specialist
- Project Based Voucher Specialist
- Lead Housing Specialist
- Assistant Property Manager
- Executive Assistant

Confidence in leading

Aspire to have:

Excellent time and project management Results-driven Strong liaison skills – internal and

external Strong oral and writing skills Strong accountability



Lead Housing Specialist

Next Step Opportunities:

- · HCV Manager (various)
- · Property Manager
- · Procurement Specialist
- · Compliance Specialist

Aspire to have:

Strong leadership skills

Impeccable quality monitoring and controls

Strong accountability

Results-driven

Confidence in leading



Next Step Opportunities:

• Specialized Roles If applicable, education and certification:

(Program Manager, Compliance Manager, Asset Manager, Project Manager)

Aspire to have:

Strong financial analysis

Solid business acumen

Impeccable monitoring and controls

Confidence in leading

Strong presentation skills

Blue Horizon Management Corp. (BHMC)



Leasing Agent

Entry level position

Education: HS diploma

Starting rate: \$16.83/hr

No Certifications Needed

Asst. Property Manager

Minimum of two years' experience in property management function

Education: HS diploma; Bachelors preferred

Starting rate: \$21.15/hr; \$44,000 annualized

HCV Rent Calculation Certification needed within 12 mos. of hire; tax credit certification if required by site

Property Manager I & II

PMI: Three years of supervisory experience in a customer service role with appropriate certifications.

PM II: Five or more years of experience in a PM role; ability to manage complex properties

Education: Bachelor's degree preferred or HS diploma with 5-10 years of experience

Starting rate PM I: \$ 50K; commensurate with experience

Starting rate PM II: \$60K, commensurate with experience

HCV Rent Calculation Certification required within 12 mos. of hire; tax credit certification if required by site

District Manager

Minimum of five years of experience in a property management leadership role demonstrating management experience on a regional level; experience managing a team of over 20 employees; strong financial acumen and budget experience

Must obtain CPM certification within 12 mos. of hire; Must also have same certification as APM/PM

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Starting rate: \$75K; commensurate with experience

Blue Horizon Management Corp. (BHMC)

Areas of Potential Movement



Leasing Agent

- Next Step Opportunities:
- Housing Specialist
- Receptionist
- Executive Assistant
- Assistant Property Manager
- Case Manager

Aspire to have: Strong math skills

Excellent time management Impeccable customer service Confidence in leading

Proficiency in MS software

APM

Assistant Property Manager

Next Step Opportunities:

- Property Manager
- · Compliance Specialist
- Case Manager

Aspire to have: Excellent time & project management

Advanced quality control

Strong liaison skills – internal & external

Strong oral & writing skills

Strong accountability

Impeccable customer service

Confidence in leading

Proficiency in MS software



Impeccable customer service

Confidence in leading



District Manager

Next Step Opportunities

· Senior Vice President

Aspire to have: Excellent critical thinking

Strong financial analysis

Solid business acumen

Strong analytical skills

Confidence in leading

Strong presentation skills

CORE Programs



Job Coach

Entry level position

Education: HS diploma

Starting rate: \$12.50/hr

No Certifications Needed

Case Manager/ Case Coordinator

Minimum of two years of experience in progressively responsible case management/social work experience and/or housing related work.

Education: Bachelor's degree in Social Work, Human Services, Psychology, or other closely related field.

Starting rate: Case Manager \$46K - \$48K Case Coordinator \$44,290

Lead Case Manager/ Case Coordinator

Minimum of three years of progressively responsible case management/social work experience and/or housing related work.

Education: Bachelor's degree in Social Work, Human Services, Psychology, or other closely related field.

Starting rate: \$55K

Program Manager

Minimum of three years of experience in program management, grant funding, social services, community services, and/or housing-related work.

Education: Bachelor's degree in Social Work, Human Services, Psychology, or other closely related field.

Starting rate: \$65K



Sandy Pizarro, SPHR, SHRM-SCP, MBA EVP of Talent Operations INLIVIAN

For nearly twenty years, Sandy Pizarro has been dedicated to effectively leading all functions of human capital, ensuring organizational capacity to meet challenging business needs and maintain a leadership position in the community.

Welcoming today's diverse business environment and distinguishing the essential elements for a successful operation, Sandy works

collaboratively to provide guidance on infrastructure and revitalization, talent development and acquisition, benefits and compensation, performance management and strategic workforce planning. She has been recognized for always fostering an environment that supports the organization's mission and vision.

Sandy earned her B.S. Magna cum Laude in Business Administration at the City University of New York and her MBA at St. John's University-Honors Thesis Program. Her professional certifications/affiliations include SPHR and SHRM-SCP Senior Certified Professional in Human Resources Management. She is a member of the Society of Human Resources Management and the National Society of Hispanic MBAs (NSHMBA).

Recommended Reading:

What Color is Your Parachute? (2017), Richard N. Boiles
Designing Your Life (2016), Bill Burnett and Dave Evans
So Good they Can't Ignore You (2012), Cal Newport
Presence: Bringing Your Boldest Self to Your Biggest Challenges (2018), Amy Cuddy
Do What You Are (2014), Paul D. Tiger
Body of Work-Finding the Thread that Ties Your Story Together (2013), Pamela Slim
Your Best Year Ever: A 5-Step Plan for Achieving Your Most Important Goals (2009), Michael Hyatt

Fast Forward Your Career (2013), Richard E. Hinkle