



Memo

To: Fahe Members and Staff

From: Sara Ball, Director of Strategic Planning and Internal Systems and Corporate Secretary

Re: FY 2022 – 2026 Strategic Planning

Date: October 14, 2020

We have just begun the last year of our current strategic plan and it doesn't feel like it has been five years since we were last finishing up the process to roll out the new plan. Time flies when you work at a nonprofit! Right now we are engaged at the Board level in discussions about the continuation of the strategy and what we want to accomplish in the next five years. As we are discussing the potential goals we have made some conscious choices to slow down and focus on how we want to elevate our advocacy, research/data, and justice work. These pieces of work are important to the work we have done for 40 years as a Network and we want to make sure that we give this work the appropriate frame and prominent place in our strategy.

Background

Below are the updates that the Staff has given the Board has over the past year.

March 10, 2020

In FY 2017, we began implanting the current Strategic Plan that broadened our focus from just Housing to the 5 Strategic Charges: Leadership, Housing, Education, Health and Social Services, and Economic Opportunity. As we have spent the past three and a half years operationalizing the Strategic Plan, we have worked on our yearly planning process and currently begin planning for a fiscal year in earnest the September prior. This means that we will start planning for FY 2022 in September 2020.

June 23, 2020

Staff has worked since the March meeting on updating the charges, working to outline the reasoning for pursuing each five year outcome.

September 9, 2020

Staff has continued working on the strategy for the new Strategic Plan. As we have continued conversations with the Board and with the newly formed Justice Ad Hoc Committee, we are slowing down our timeline just a bit to allow for a more thoughtful approach to a well-rounded strategy as we continue our fight toward a thriving Appalachia. We will use this time to have clear strategic direction on advocacy, community building and justice work.

Staff will be working to reach out to the Board for opportunities to schedule workshops where we can dive into the changes in format, wording, and framing. Those meetings should be scheduled in last quarter of 2020 through the first quarter of 2021.

Action

Since you have asked for this update you are invited to add your input and to ask your questions. Attached to this memo is the latest draft of pieces of the Strategic Plan along with feedback from a Board conversation on September 9th.

Please feel free to email me with your questions and/or suggested updates at sball@fahe.org.

Vision, Values, and Mission for Strategic Plan

Vision

(A Generation from Now)

Appalachia is a place of choice where residents are empowered to build resilient communities and there is opportunity for all to realize their potential.

Values/Guiding Principles

(Things that Guide our Strategy)

Strength in Numbers – we can do more together.

Trust takes time to build, effort to maintain, and both are worth doing.

For places to thrive, systems have to change.

Mission

(In the Next Few Years)

Fahe leads a network of Appalachian organizations to sustainable growth and measurable impact through collective voice and provides access to capital that creates housing and promotes community development.

Theory of Change

(How We Achieve Lasting Change)

- Leadership addresses challenges and moves the region forward.
- Affordable housing allows for stable communities and the ability to take a long view.
- Social and health services create a healthy, secure environment for the region to prosper.
- Education and training create opportunity, reduces social and economic disparity.
- Economic security provides revenue to the region needed for services and growth.

Core Competencies

(What We Are Good At)

Fahe:

- **Finances** housing infrastructure, small businesses, nonprofits, community development, and other opportunities to improve the economic strength of the region;
- **Collaborates** with Members, key partners, and stakeholders at all levels – local, state, regional, and national – and from various sectors to improve the quality and delivery of services;
- **Innovates** to build platforms that deliver products and services at scale;
- **Advocates** for resources, programs, and policies that will meet the needs of the people, communities, and organizations that we serve; and
- **Communicates** about best practices, trends, opportunities, needs, and challenges to support learning, connectivity, and momentum across sectors and geography.

Strategic Charges

Leadership: Fahe will increase the strength of local leaders throughout our work.

Housing: Fahe will expand the reach and depth of our housing platforms.

Education: Fahe will extend our core competencies to support increased educational attainment in the region.

Health and Wellness: Fahe will facilitate multi-sector collaborations to help our communities achieve, sustain, and thrive in a culture of health and wellness.

Economic Opportunity: Fahe will expand social enterprise and advance economic opportunities.

Commented [SB1]: Notes from September Board Meeting on starts on page 2 of this document.

Conversation about Values at Board Meeting

Values Conversation

Person 1:

- Systems change – this hints at what we want but doesn't hit it and appears to be out of sync with others.
 - What systems? What problems do we see?
 - "Oppressive" systems?
 - Do we name people (women, race)?
- What should be a value vs. a goal? Goals line up with values.
- Values are like big versions of core competencies like strategy is to goals.

Person 2:

- Our obvious values are:
 - Strength
 - Trust
 - Courage – courage to change the things we can, to keep working against what's wrong

Person 3:

- Nothing about housing is in the values. Is this ok?

Person 4:

- Justice is the base for all of these things

Person 5:

- We should think about Persistence and Commitment

Person 6:

- The structure should be What & Why.
- Strength in Numbers (what) – we can do more together (why)

Person 7:

- Can we add How to the structure too?

Person 1:

- Do we break the third option into two pieces?
 - Commitment to Place (Home is place?)
 - Systems Change

Person 8:

- Leadership should be represented here too.

Strength of Language around Justice

Person 4:

- Language should invoke thoughtfulness but not using trigger words
 - i.e. Being advocates vs. activists
- We want to be more peacemakers and invite inclusion.

Person 3:

- We should be perfectly clear with where we stand while not agitating. We should be clear and forceful but not antagonistic.

Person 8:

- We want to invite conversations because there has been too much silence.
- How do you agitate enough to invite enough folks into a conversation?

Person 5:

- Our values have always been bold and should be bold and quietly consistent.
- Motto from AE group was "we do housing but we are about justice."

Person 9:

- Members actively pursue inclusion and social justice in their communities.
- We are people of action!

Person 10:

- Look back at what was written in the beginning by HEAD – what did they say?

Person 11:

- We work in the same region that we live in. We are rooted – our voice comes from our experiences.
- We experience life where we want to see change.

Person 12:

- These values have helped us weather the storm. We live on the ground, we are able to feed data up to state and national level because we own the data.

New Draft Value Options

Person 2:

Strength in Numbers - we can do more together.

Building Trust - we uphold integrity in our relationships.

Commitment to Justice - we pursue systems change on behalf of our communities.

Deeply Rooted - informed by our lived experience in Appalachia.

Person 5:

Housing - we know that this is where equity and opportunity begin

Person 7:

Strength in numbers - we can do more together to change systems

Courage to demonstrate a clear commitment to justice

Transparency and consistency to implement programs that build resilient communities in Appalachia

Person 12:

Justice - Housing is where equity and opportunity begin.

Strategic Charges

STRATEGIC CHARGE #1: LEADERSHIP
Fahe will increase the strength of local leaders throughout our work.

Commented [JK2]: I think we should come up with advocacy statements for Leadership and Education as we did with the other three pillars.

Appalachia is a region characterized by the extraction of natural resources that has primarily benefited outsiders. Many residents do not have the perspective or faith in their own ability to create a different future for themselves or their families. These circumstances accentuate the need for strong leadership with local perspectives to improve economic security, build trust, foster hope, and align resources to achieve impact that benefits the region's residents and communities.

Why Fahe?

Fahe's network represents an outstanding field of leaders with the potential to grow in their ability to craft strategies that improve the region's economic stability. The network also provides opportunities for local leaders to overcome geographic isolation to craft interventions with a regional and national perspective.

Fahe helps leaders from different sectors work together to create solutions that are innovative, place-sensitive, person-focused, and efficient in the use of available resources. We provide the training, support, resources, and connectivity local leaders need to become the architects of our region's future.

CORE COMPETENCIES—to support leadership development, Fahe will:

COLLABORATE: Work with leaders from our network to:

- craft solutions for problems faced by their communities,
connect them with leaders from other sectors and geographies, and
take advantage of emerging opportunities to connect resources to community needs.

FINANCE: Invest in leaders through the provision of:

- training and networking opportunities via caucus, spring and annual meetings,
access to other trainings at low or highly subsidized cost, and
financial resources to support community-level interventions.

ADVOCATE:

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INNOVATE: Explore, prioritize, and test potential models for supporting leadership development that connects leaders to resources and expertise in deploying those resources to best effect.

COMMUNICATE:

- Forecast opportunities and challenges to help leaders prioritize interventions, align with available resources, and otherwise prepare their organizations and communities for the future.
Articulate a vision, strategy, and plans that take into account the region as a whole and the opportunities to work collaboratively for deeper impact.

What will be different in five years?

Fahe's founding fathers were community-based leaders who became our first Members—and Members continue to form the backbone of our organization. Fahe's foundational belief is that local leaders will create lasting change in their communities, leading to greater community engagement, healthier communities with access to services and quality education, which in turn drives economic opportunity to the community. Moving forward, Fahe will:

Commented [SB3]: Attempt to connect the charges.

- Be recognized as the foremost collaborative Membership in the Nation, so that resources continue to and increase their flow into our region in a way that builds our communities.

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- Provide leaders with access to increasing resources to meet the needs of their communities, so that communities ~~create will find~~ holistic solutions to issues that contribute to continued poverty.
- Elevate our collective voice, increase local capacity, and increase civic engagement, ~~so that the real strength of Appalachia, our culture of pride and hard work, will be seen and appreciated. In order that we have the necessary power to bring about real and lasting change.~~
- Ensure that Members will be recognized nationally as frontline leaders who can effect substantial change in their communities, ~~so that resources allow continued innovation and other communities might benefit from the lessons we have learned in Appalachia; their vital role must be recognized and heard to bring appropriate resources and attention to our communities.~~
- ~~Provide a platform for diverse local leaders to be heard, so that all of the voices in our communities are heard. Amplify voices who have been typically been marginalized.~~
- ~~Play a critical role in raising up the next leaders within the organizations.~~
- ~~Empower Members to identify, nurturing, and developing diverse leaders within their communities, so that diverse, local leadership is rich and strong for generations to come.~~

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Commented [SB4]: Board Comments

Is there an ability to help grow organizations in Member communities', like helping CHDOs grow into larger Community Development Organizations?

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STRATEGIC CHARGE #2: HOUSING

Fahe will expand the reach and depth of our housing platforms.

Commented [SB5]: Should we update this?

Commented [JK6]: Yes.

Housing is a basic need, and having a safe home is a critical precursor to almost every other positive metric: educational attainment, employment, and a variety of other indicators for stability and hope for a better life.

Persistent poverty, substandard housing stock, rising energy costs, and a dearth of rental properties are just a few of the barriers to stable housing residents of Appalachia face. The region needs strategies, access to resources, and platforms with the capacity to deliver housing solutions at scale.

Why Fahe?

Fahe is a Membership of 50+ non-profits, operating in hard-to-reach communities in our region. This network has served over 650,000 people with quality housing over the past 40 years. We create access to subsidy and secondary market resources that, without Fahe, would not reach the low income communities and residents of our region.

Commented [SB7]: Took 616,694 (total served as of FY 2019 end) and rounded up.

Commented [JK8]: This is a number that will need updated, so must be highlighted for future change.

We use the "Strength in Numbers" represented by our network to advocate for resources, programs, and other resources needed to support housing and community development. We use our business platforms and network to deliver housing at scale.

CORE COMPETENCIES—to support increased delivery of quality housing, Fahe will:

COLLABORATE: Work with Members and Partners to increase the scale of housing delivered in the region and leverage our expertise in housing to advance work in the other strategic charges.

FINANCE: Finance purchase, development, and rehabilitation of homes that are affordable.

INNOVATE: Change the way that housing solutions are created at a national level, improve housing design, energy efficiency, financial products, and affordability.

Commented [SB9]: Board Comment

Need to add access, or removal of barriers.

ADVOCATE: Promote at all levels (federal, state, local) policy and resources that expand access to quality housing that is affordable.

COMMUNICATE: Leverage our reputation and communication channels to:

- raise the voice about need and value of housing in the region and across the nation;
- publish best practices, share what works and what we've learned; and
- facilitate sharing and introduce new ideas among Network.

What will be different in five years?

Fahe's foundational commitment and authority in the delivery of high-quality housing continue to support our performance-based culture. Our experience over the past 40 years has lead us to understand that housing is a key element in creating sustainable communities where healthy solutions, educational attainment, and economic opportunities are readily available. Over the next five years,

Commented [SB10]: Attempt to connect the charges.

Fahe will:

- Provide 90,000 people with housing services annually, so that residents in our communities build a sense of hope while creating stability for their families.
- Continue to be recognized as a national leader in all areas of housing affordability, so that our experience and insight might strengthen the affordable housing industry and we increase our voice and influence.

Commented [SB11]: Update this per data and what we think is possible.

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- Could there be a goal here to increase the number of minority headed households? Right now we are saying 30% of our portfolio of loans with our origination are currently with minority headed households.
 - We would have to be clear about the drivers and the reason that we would want to create a number to work toward.

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Commented [SB12]: Board Comments

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STRATEGIC CHARGE #3: EDUCATION

Fahe will extend our core competencies to support increased educational attainment in the region.

Educational attainment in the region is low. Too few residents have the luxury of making education a priority because basic survival takes precedence. Education is key to creating hope that things can change; investing in people via education is essential to moving the region forward.

The lack of stable housing in Appalachia negatively affects educational attainment for residents in the region in many ways. In particular, the lack of stable housing makes it difficult for children and families to succeed in their educational pursuits and consequent employment; and communities to attract and retain teachers.

Why Fahe?

Our network of members on the ground provides Fahe a unique perspective and significant advantage by informing our understanding of challenges faced by Appalachian communities. This view has helped Fahe and many nonprofits in our Membership understand that safe housing is needed to provide families the "luxury" of investing time and resources in the pursuit of education.

Our region's most impactful educational initiatives are person- and family-centered, and are built upon collaborations across sectors. Fahe has begun to work with leaders of these initiatives to integrate housing into whole person intervention strategies, and we believe that our core competencies and scalable platforms for the delivery of the resources and capital can support solutions that will improve educational attainment.

CORE COMPETENCIES—to support increased educational attainment, Fahe will:

FINANCE: Develop programs, services, and financial products that prioritize educators and families with children and connect them to stable housing.

COLLABORATE: Build alliances with universities and other educational institutions to inform innovations that support education and bridge workforce need to educational providers.

INNOVATE: Conduct the research and experimentation needed to develop and launch an initiative and targeted lending products that support positive intersections for housing and educational attainment.

COMMUNICATE: Communicate the critical role of stable housing in attaining quality education; and use communication channels to our customers to promote educational opportunities.

What will be different in five years?

Because this area is especially new to Fahe, our goals continue to be modest and exploratory. We ~~de~~
~~continue to~~ affirm our belief in the need for educational attainment as a means creating larger scale opportunity in Appalachia which will result in better healthcare and greater economic opportunities.

Over the next five years, Fahe will:

- Be recognized regionally as key partners at the intersection of education and housing, so that we can gain a better understanding of how Fahe can be of greater service to our partners in the education sector and encourage greater educational attainment.
- Develop new partnerships between Fahe leaders and education stakeholders that develop approaches to provide educators and families with secure housing and fairly priced financial products, so that the educators and families in our communities have greater stability.

Commented [SB13]: Attempt to connect the charges.

Based on strategic work that we will do in FY 2021, we should have goals that are centered on how Members work with education partners to further educational attainment through services that Members provide to their communities.

STRATEGIC CHARGE #4: HEALTH AND WELLNESS

Fahe will facilitate multi-sector collaborations to help our communities to achieve, sustain, and thrive in a culture of health and wellness.

Commented [SB14]: Language is more in alignment with RWJF Healthy Communities language.

Appalachia lacks the resources, health systems, multi-sector partnerships, and infrastructure to support the growing need of vulnerable populations like the elderly. Residents of Appalachia are often deprived of choice and opportunities to thrive by poorly coordinated social and health services that prioritize systems and compliance over people. Without a safe place to live, people cannot focus on a culture of health and wellness.

Commented [SB15]: Needs to be updated. Calling out elderly – needs to be broadened. What work have we been able to move?

Why Fahe?

Over the past 10 years, Fahe's network of partners has expanded to include organizations with a primary focus other than just housing, and has successfully leveraged financial resources into the development of community health centers and recovery programs. Working with such groups broadened our perspective on the need for coordinated services, and our partners insist that an intermediary like Fahe can help achieve greater coordination in the sector. Through collaborations like the Elder Initiative, Fahe is growing in both ability and perspective about how best to bring person-centered multi-sector services to those in need.

Commented [SB16]: Needs to be updated. Calling out elderly – needs to be broadened. We are not doing person-centered multi-sector focus.

CORE COMPETENCIES—to support multi-sector collaborations, Fahe will:

COLLABORATE: Bring together key stakeholders from sectors that systematically touch healthcare and wellness to support them working together more effectively and at less cost.

FINANCE: Develop, administer, or replicate:

- state programs focused on drug recovery
- products that expand our growing body of work in Community Health Centers and recovery facilities; and
- a financial model (e.g., Social Impact Bond) that supports the construction, operations, and sustainability of projects and facilities that wrap service around people.

INNOVATE:

- Establish relationships with healthcare organizations, based on work that is currently being done with Ballad Health;
- Examine current models within the Membership to find currently unidentified similarities to build coalition.

ADVOCATE: Keep holistic solutions to key health and wellness issues, like opioid use and aging population, in the forefront of our advocacy work.

COMMUNICATE: Promote work by Partners and Members in a way that is attractive to funders, philanthropic, private, and federal.

What will be different in five years?

Fahe is continuing to grow in our ability to develop facilities and programs that integrate services and support cross sector results. Fahe's Network of leaders continues to connect our expertise with housing to various healthcare focuses, including, but not limited to, drug recovery, elder care, and community health, working to create stability through housing, job training, and other opportunities. Moving forward, Fahe will:

Commented [SB17]: Needs to be updated. Calling out elderly – need to broaden

Commented [SB18]: Updated the language a bit

Commented [SB19]: Attempt to connect the charges.

- Be seen as national leaders in multi-sector collaborations to help our communities to achieve, sustain, and thrive in a culture of health and wellness, so that other regions might benefit from the lessons that we have learned.
- Be seen as the expert, not just administrator, in combining drug recovery, housing, and supportive services in Central Appalachia, so that we design approaches capable of reduce reducing the recidivism rate by 20% in the next five years.
- Collaborate with Members, Partners, and Foundations, to find holistic solutions for community health in Central Appalachia, so that we can promote a culture of health and wellness, as means of strengthening our ability to influence resources coming into the region.
- Maintain recognition as thought leader on the intersection of health, wellness, and housing services, so that resources will flow into the region allowing us to continue to innovate and learn.

Commented [SB20]: Board Comments
Can we make this more powerful? Should we use multi discipline?

Commented [SB21]: Board Comments
"Social Determinants of Health"

Commented [SB22]: This is aligned with PRT Strategic Plan.

STRATEGIC CHARGE #5: ECONOMIC OPPORTUNITY
Fahe will expand social enterprise and advance economic opportunities.

The financial market in Appalachia is broken, making it difficult to develop new businesses, housing, and infrastructure in this largely rural region. Existing economic opportunities and delivery systems do not meet the demand for capital, credit, and other financial services that creates jobs and improves livelihoods. Therefore, persons of working-age continue to migrate out seeking income and economic opportunities. Research shows that increased levels of targeted community development financing improve economic conditions and opportunities, creating more choices and opportunities for residents to achieve economic stability.

Commented [SB23]: What is the problem we are really solving for - \$41/person/year.

Why Fahe?

Since 2005, Fahe's scope of work has expanded to include the development of facilities, infrastructure, and small businesses that is needed to support economic opportunities in Appalachia. Our core competencies and platforms could be further expanded or replicated to facilitate the flow of additional capital for economic and livelihood impact well beyond "just" housing. With as much as 20% of our annual direct investment now targeted to community development, Fahe is well positioned to develop additional economic opportunities that are person-centered, like consumer lending, credit unions, and workforce development opportunities.

CORE COMPETENCIES—to advance economic opportunities in the region, Fahe will:

COLLABORATE: Work with:

- regional stakeholders and service providers to raise awareness and improve effective deployment of resources; and
- national peers to protect existing and develop new resources for addressing persistent poverty.

FINANCE:

- Expand access to affordable financial resources via partnerships and/or in-house products.
- Develop products to meet the needs of underbanked people and communities.

INNOVATE:

- Explore our platforms' potential to support additional economic development activities and repair the region's broken markets.
- Explore, prioritize, and test potential models for consumer lending.

ADVOCATE: Campaign at the federal level to improve availability and access to fairly priced financial resources.

COMMUNICATE: Amplify messaging around need and opportunities to address persistent poverty in the region and appeal to philanthropic, private, and federal funders to improve availability and access to fairly priced financial resources.

What will be different in five years?

Economic opportunity is ultimately necessary to have a thriving community, even though it tends to be a lagging indicator for the success of the other work that we do. Our local leadership leads to greater civic engagements and better health and education solutions leading to greater economic opportunity. Building on our experience in targeting community-based financing to housing and facilities development, over the next five years Fahe will:

Commented [SB24]: Attempt to connect the charges.

- Support and promote social enterprise work within the Fahe Network, so that local leaders are providing solutions for their communities and alternative sources of income to further their nonprofit work.
- Build solutions for unbanked and underbanked people in our region, so that everyone has the opportunity to access checking and savings accounts and fairly priced financial products.
- Increase philanthropic, private, and federal investment in the region to move investment above \$41 per person per year, so that investment in people in Appalachia is raised closer to the investment experienced in other areas of the country.
- Expand access to capital for small businesses, so that local entrepreneurs are supported and given the opportunity to thrive in their communities.

Commented [SB25]: Board Comment
Andy wants this to be able to support others outside of the Membership but within our communities.

Commented [SB26]: Alignment with PRT Strategic Plan

Commented [SB27]: We need a way to connect this to the work we do. What money coming in

Additional Items for Discussion

These thoughts need to be worked into the entire Strategic Plan in a way that elevates them to represent their importance but they do not belong in the charges per se.

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Advocacy

Strength in Numbers (Advocacy and Powerbuilding)

By the end of FY 2026 we want to have transitioned into a Network that:

1. has Members at the table, making decisions on policy that will help the region at scale because their investment in these ideas and willingness to act is how we get our strength in numbers.
2. thinks of thought leadership (policy and communications) as well as policy advocacy to achieve our vision.
3. is politically sophisticated in its analysis of how to achieve both narrow policy goals and the potential for broad policy goals
4. has won local and state government victories
5. is able to talk about those victories with funders and other partners and why that matters with the goal of further adding to their own (and consequently the Network's) total resources

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Commented [JK28]: These ideas below are from my last two meetings with Alex. I think we cannot succeed with the ultimate vision without broadening our view and work in this area. I don't have time to turn this into the language we need but it's the meat of the idea.

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Diversity and Inclusion

We will pursue conversations around diversity and inclusion before completing this Strategic Plan and this is meant to be a place holder that that topic.

Strength in Numbers (Advocacy and Powerbuilding)

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- thinks of thought leadership (policy and communications) as well as policy advocacy to achieve our vision.
- is politically sophisticated in its analysis of how to achieve both narrow policy goals and the potential for broad policy goals
- has won local and state government victories
- is able to talk about those victories with funders and other partners and why that matters with the goal of further adding to their own (and consequently the Network's) total resources