

FY11_12 Work Plan			
<p><b>Overall Program Service Goal:</b> to directly serve 76 households (same # as last FY). 18 U.S. &amp; 11 Global homebuilding; 33 Habitat minor weatherization rehabs; 14 other households assisted (e.g. matching downpayment grants; matching Housing Trust fund grants; etc). Note: 21 U.S. house starts this FY (compared to 19 last FY and 11 the prior FY); 18 house closes (compared to 15 last FY and 14 the prior two FYs); 8 forecasted rollovers (compared to 8 last FY and 3 the prior FY). <b>Items in red are from the 2011 Board/Staff retreat. Items in green following upon commitments from the National Affiliate Conference. Items in blue added since May 19 Board approval.</b></p>	<p><b>Mission:</b> We work to end poverty housing by creating opportunities for homeownership in partnership with low-income families and by making safe, decent, affordable housing a matter of community conscience and action. <b>Strategic Charge:</b> It's Possible. Now is the time. We are the people.</p>	<p><b>3 Operating Values:</b> 1. Partnership 2. Balancing individual benefit and commongood 3. Stewardship <b>Operating Style:</b> <i>Entrepreneurial, committed, generous, optimistic, with integrity and fortitude.</i></p>	<p><b>Our Unique Value:</b> More than any other organization or endeavor in the cause of developing sustainable housing solutions and revitalizing neighborhoods, Habitat fosters the "social capital" and goodwill that are needed to provide the political will and the resources (both private and public) necessary to end poverty housing. Within the context of our 3 operating principles and through our <u>disciplined approach</u> and our <u>ability to inspire</u>, and persuade, we foster community engagement, credible results, and a sense of community abundance. Our focus on delivering <i>the "Wow"</i> and "<i>Doubling/Deepening Our Impact</i>" helps us to generate the quality and quantity of social capital needed to end poverty housing. Six Traits of High-Impact Non-Profits: 1. To advocate &amp; serve. 2. To be entrepreneurial. 3. To inspire "evangelists" and mobilize volunteers for the cause. 4. To nurture nonprofit/business networks. 5. To master the art of adaptation. 6. To share leadership. HFHI statement: "It takes both the community of housing need and the community of influence &amp; affluence to bring systemic change to the provision of decent affordable housing."</p>
<u>Service Area &amp; leads</u>	<u>Goal</u>	<u>Timeline</u>	<u>Status</u>
<b>Advocacy - Michael</b>			
	<b>Get State Housing Trust Fund Board, ADOH, and possibly the Legislature, to agree to the National Housing Trust Fund's 10% set-aside for homeownership</b>		
	Increase current proposed \$30M GO Bond amount for affordable housing prior to fall 2013 election	Fall 2013	Need a PR video on the value/benefits of homeownership to households, neighborhoods, and the community. Continue to meet with Bond Committee.
	Revenue into the City's and County's Housing Trust Funds	Spring 2012	Continue to utilize HFHT's community impact granting to leverage Trust Fund and/or other community funds (i.e. from private-sector)
	Support regional visioning, planning, and real-estate industry collaborations	ongoing	Imagine Greater Tucson (IGT). Real Estate Building Industry Coalition. IGT's community surveying work has articulated this: "We value a community where our children will choose to live, a community that offers a safe environment, affordable and accessible housing and health care, and other social services for all."
	Develop or maintain housing assistance partnerships where needed, desirable, feasible	ongoing	
	<b>In partnership with marketing &amp; homeowner services, develop and launch a PSA campaign.</b>	fall 2011 launch	<b>create a video?</b>
	Prep partnerships for tax credit advocacy campaign, if necessary		Barbara's local tax-credit coalition
Lori & Danny	Assist with HFHI's national/federal advocacy and <b>neighborhood revitalization</b> agenda	ongoing	<b>In partnership with Homeowner Services and Construction, implement and oversee affiliate's participation in HFHI's Neighborhood Revitalization Initiative</b> Ensure that HFHT's community development plans include the 6 livability principles from the newly established Federal Interagency Partnership for Sustainable Communities (HUD, EPA, DOT): 1) Provide more transportation choice; 2) Promote equitable affordable housing; 3) enhance economic competitiveness; 4) Support existing communities; 5) Coordinate policies & leverage investment; 6) Value communities & neighborhoods. Evaluate such the appropriateness and efficacy of such theoretical frameworks to supplement and evaluate the effectiveness of the NRI approach as NeighborWork's Success Measures, Keystone's Constituency Voice Assessment Framework Ruby Payne's Framework for Understanding Poverty/Bridges Out of Poverty, or the U.N.'s Habitat Agenda and Millenium Development Goals, or Jeffrey Sach's Millenium Promise, or the Abdul Latif Jameel Poverty Action Lab at MIT, or Stanford's Collective Impact, or Habitat Sandtown, etc.

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	<p><b>In partnership with the Board Development Committee and the Resource Development Committee, launch Advisory Council and host at least one event for the Council</b></p>	<p>fall 2011 launch</p>	<p><b>Assists from Angela, Steve, and Barbara.</b></p>
<p><b>Construction &amp; Land Development - Danny</b></p>			
<p>Danny (Michael &amp; Lori)</p>	<p>Increase volunteer capacity for minor rehab program</p>	<p>ongoing</p>	
<p><b>Construction &amp; Land Development - Danny</b></p>			
<p>Danny &amp; Site Supervisors</p>	<p>Ensure no more than a 5% increase in total vertical construction costs over FY10_11 levels, and/or increase in-kind donations to construction to offset cash outflow increases. Maintain on-time close of homes</p>	<p>ongoing</p>	<p><b>Utilize both female and male inmates from the ADOC. Continue partnership with Santa Rita High School and launch partnership with Pima Community College.</b></p>
<p>Patrick</p>	<p>Complete close-out and turn-over to the City and HOA of CDP subdivision and Casa Alegre subdivision</p>	<p>Summer 2011</p>	
<p>Site Supervisors</p>	<p>Maintain, at a minimum, the County "silver" standards for sustainable/green construction</p>	<p>ongoing</p>	
<p><b>Construction &amp; Land Development - Danny</b></p>			
<p>Danny &amp; Lori</p>	<p>Prep for land-development activities in FY12_13 on post-CDP land-development/construction project</p>		<p>Santa Maria (8-10 townhome lots). NW Fire District (6-8 lots). Green Valley lots? <b>Lori to determine if there is a market for a co-housing project.</b></p>
<p>Site Supervisors</p>	<p>Ensure compliance with OSHA safety standards, <b>including new roof-safety standards effective summer 2011</b></p>	<p>Ongoing, with regular self-audits</p>	<p>Danny is the HFHI designated safety officer.</p>
	<p>Reduce by 25% the annual # of warranty calls from prior year (i.e. no more than 34 warranty calls in the year) and improve average cycle-time to complete warranty items by 50% (within 2.5 days of call-in)</p>		

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<p>Betsy and site supervisors</p>	<p>Increase per house construction in-kind donations by minimum of 5%</p>		<p>In FY11_12, HFHI softwood lumber subsidy of approx. \$5.7K/house will drop by 25%</p>
<p><b>Homeowner Services - Lori</b></p>			
	<p><b>Develop plan to sufficiently and more robustly integrate the voice of our "primary constituent" (clients) into our decision-making processes and document that integration as part of our nonprofit sector constituent accountability requirements.</b></p>		
<p><b>Homeowner Services - Lori</b></p>	<p>Keep 90-day delinquency rate to 1.5% or below; keep 60-day delinquency rate to 4% or below; keep 30-day delinquency rate to 11% or below; keep overall delinquency rate to <u>15%</u> or below.</p>		<p>During the 2008-present, our average household AMI served is 55%</p>
	<p>Continue 8 hrs of HUD-certified counseling for CDP homeowners</p>		
	<p>Quality improvements in homeowner education curriculum, lesson plans, and a diverse array of skilled presenters</p>	<p>Ongoing</p>	
	<p><b>Randomized sample comparison of socioeconomic benefits of Habitat homeownership</b></p>	<p>by end of FY</p>	<p>Work with HFHI to conduct national survey to validate their "Theory of Change."</p>
	<p><b>Develop a win-win strategy to incentivize high-performing homeowners to pay-off their mortgages early</b></p>		
<p>Patty</p>	<p>In partnership with other organizations, ensure sufficient individual development accounts for our clients</p>		<p>Pio? Live the Solution? Other?</p>

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<p>Joseph</p>	<p>Ensure ongoing celebration ceremonies for homeowners who pay-off their mortgages</p>		
<p><b>Financial/Administrative Services - Michael/Lynn</b></p>			
<p>Lynn</p>	<p>Produce full-set of monthly financials within 3 &amp; 1/2 weeks of month end</p>		
	<p><b>Retire up to 8% of pre-NMTC transaction outstanding operating debt (approx. \$200K)</b></p>	<p>Apr-12</p>	<p>Michael</p>
	<p>Receive a clean A133 audit</p>		
	<p>Continue "table-funded" mortgages</p>		<p>in partnership with Homeowner Services</p>
	<p><b>Implement New Market Tax Credit program</b></p>		<p>with Michael</p>
<p>Judy</p>	<p>&lt;15% increase in benefit costs</p>		
<p>Judy</p>	<p>Maintain office system costs no more than 110% of FY10_11 levels</p>		
<p><b>Financial/Administrative Services - Michael/Lynn</b></p>			
<p>Michael/Danny</p>	<p>Use USDA 502 zero-equivalent mortgage loans for our future Marana &amp; Amado homes (<b>Danny</b>). Also, research feasibility and logistics of alternative financing strategies, including becoming a <b>CDE/CDFI</b>, and/or issuing tax-exempt bonds through State's Community Facilities District statutes, and/or use of City IDA's CDBG Section 108 low-interest financing <b>and/or NCB Capital Impact Fund (Michael)</b>.</p>		<p>In Re USDA 502: HFHI now allows this. Current <i>i</i> cap is 4.8%, which can be written down to 1% depending upon household income. Term of mortgage: 33-38 yrs.</p>
<p>Judy</p>	<p>Implement password-protected Staff section of the website</p>	<p>Fall 2011</p>	<p>with Amanda</p>

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<p><b>Community Development, Marketing, &amp; Volunteer Services - Maureen</b></p>	<p>At a minimum, increase direct-mail revenue by 10% over FY10_11 actuals. Increase tax-credit revenue by 25% over FY10_11 levels</p>		<p>For July-Dec 10: direct-mail revenue was \$202K or \$28K (16%) above the same timeframe last FY. Tax-credit revenue was 332 gifts for cumulative giving of \$72K vs. 255 gifts last FY for cumulative giving of \$60K for a 20% \$ increase over last FY. In the last 4 yrs, we've seen a 28% erosion in our number of &lt;\$1K donors, although that group's cumulative annual giving has only declined 3%.</p>
	<p>Through the development of a diverse robust high-touch major donor program, increase both the number of major donors (&gt;\$1K/annum donors) and their cumulative giving by a min. 5%. This will mean adding at least another 10 \$1K+ donors, for 197+ total \$1K+ donors. It also means adding at least \$48K to a base of \$967K from these \$1K+ donors.</p>		<p>In the past 4 calendar years, the # of our \$1K+ donors has only increased 1% and their cumulative giving 3%. Robust, dynamic moves management process to be institutionalized. <b>Re-energize house sponsorships team/theme builds, utilizing more robust/interactive web-based team-giving tools and launch series of team build opportunities, e.g. birthdays &amp; anniversaries; leadership/celebrity/CEO builds; org builds like TREAO, SALC, etc) . Also, Hailey to get Matthew Dunbar's Housing Sabbath packet from the NYC affiliate's School of Faith, Action, Impact.</b></p>
	<p><b>Prep for an FY12_13 "A World of Hope: It Begins at Home" capital campaign" with a 1:1 developing nation home sponsorship match, such that for every philanthropic \$ raised for a local home we'll also raise 5 cents for a developing nation home sponsorship.</b></p>		<p>Begin by asking people to round up their annual giving by 5%?</p>
<p><b>Community Development, Marketing, &amp; Volunteer Services - Maureen</b></p>	<p><b>In partnership with the Board Development Committee and the Development Committee and Michael, conduct bi-annual "bus tour" events for key community leaders to learn more about Habitat and the challenges and constraints of affordable housing.</b></p>		
<p>Joseph</p>	<p>Hold quarterly house parties for major donors/prospects</p>		
	<p>In partnership with the 3 volunteer working committees of the Santa Cruz Valley Chapter, maintain level of support from the Green Valley area</p>	<p>Ongoing</p>	

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<p>Danny</p>	<p><b>Design "Habi-U" curriculum, teachers, pricing in partnership with Construction</b></p>	<p>?</p>	<p>with marketing assists from Amanda &amp; volunteer assists from Hailey</p>
	<p>Maintain Charity Navigator 3-Star rating; and continually update our Guidestar Exchange Seal data</p>		
<p>Amanda</p>	<p>12 media hits/month; Increase web, text, and social-media giving by 25%; Increase e-newsletter sign-ups by 15%; Increase Facebook fans by 100 people; Launch active Speakers Bureau.</p>		<p>Re-launch the PR &amp; Marketing Committee and an active Speakers Bureau. Focus on the green marketing/fundraising potential of our home design and construction practices.</p>
<p>Hailey</p>	<p>Develop crew-leader recruitment, orientation, ongoing training, retention, &amp; recognition program</p>		<p>Focus: crew leader development, as well as housing advocacy moments through a <u>HabiMinute</u> program. Treat volunteers with the GREAT principles: Greet, Radiate interest in them, Educate, Accept their gifts, Thank.</p>
	<p>Collectively, Habitat staff to contribute at least 400 hours during the fiscal year to the common good through our non-Habitat community service voluntarism</p>		<p>Every full-time staff member would be utilizing the paid community service day, plus management team's current level of estimated community service would need to be maintained.</p>
	<p>Continue prepping for Tool Box Bash event for Spring 2013</p>		<p>Rosey Koberlein to chair</p>
	<p>Planned giving drive/campaign</p>	<p>?</p>	<p>First develop web-based capability/program. Utilize consultant?</p>
<p><b>Retail Operations - Terry</b></p>			
	<p>Achieve minimum 23% net margin on gross revenue</p>		
<p><b>Retail Operations - Terry</b></p>	<p><b>Continue strategies to acquire and learn more about our customer demographics (e.g. point-of-sale data-gathering, even if just zip-code info, as well as more extensive in store or web-based surveys; etc)</b></p>		
	<p><b>In partnership with Development, design &amp; implement a way for shoppers to make donations (even if it's just "rounding up" their change)</b></p>		

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	<p><b>Continue to serve as a marketing/PR vehicle/site for all of Habitat's programs, including homeowner applicants, our "green" message, etc</b></p>		