

FY10_11 Plan			
<u>Overall Program Service Goal:</u> to directly serve 74 households. 14 U.S. & 10 Mexico homebuilding; up to 20 Habitat minor rehabs (could possibly include 10 from PYT grant from FY09_10; potential DOE grant; and S. Park CDBG grant relocation); up to 30 downpayment assistance.	<u>Mission:</u> 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.	<u>3 Principles:</u> 1. Partnership 2. Balancing individual benefit and commongood 3. Stewardship	<u>Our Unique Value:</u> More than any other organization or endeavor for our cause, we help to foster the "social capital" that is 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 power of persuasion, we foster inspiration, credible results, and a sense of community abundance. <u>The Wow</u> and <u>Doubling Our Impact</u> initiatives help us to generate the quality and quantity of social capital needed to end poverty housing.
<u>Service Area & leads</u>	<u>Goal</u>	<u>Timeline</u>	<u>Status</u>
Advocacy - Michael			
	Voter approval of Pima County's GO Bonds	Fall 2011	
	Revenue into the City's and County's Housing Trust Funds	Spring 2011	interdependent with City & County budget on "core services", i.e. public safety
	Launch of regional planning group/process and support of their BHAGs - i.e. Call to Action's 2030 BHAG that everyone in Pima County will have safe, decent, affordable housing	Fall 2010	Both the under-way "Call to Action" group, and the "Imagine Greater Tucson" group
	Maintain down-payment assistance program partnerships	ongoing	Expand partnerships, including the pilot EAH program at Carondelet
	Manage "barn-raising" project in partnership with the City's Metropolitan Housing Commission	Fall 2010	
Danny	Launch HabIMinute education program		Hailey to help with as well
	Prep partnerships for tax credit advocacy campaign, if necessary		
	Continue to work with County & City officials to stream-line the development process and minimize/eliminate barriers	Fall 2010	under-way
Construction & Land Development - Danny			
Danny	Launch minor rehab program	Winter	Contingent upon Michael/Danny securing DOE grant. Lynn to secure release of S. Park CDBG funds for use.
Site Supervisors	Reduce construction materials/sub costs per house min. 5% from FY09_10 levels and maintain on-time close of homes		Determine value-engineered cost-reductions in summer 2010 and present to management
Patrick	Continue to obtain City acceptance of close-out of CDP subdivision and reduce performance bond	Fall 2010	
Patrick	City acceptance of close-out of Casa Alegra subdivision	Spring 2011	
Patrick	Obtain ROC exemption from the need for a person as our qualifying party	Summer 2010	
Site Supervisors	Maintain, at a minimum, the County "silver" standards for sustainable/green construction		ongoing
Danny	Line up post-CDP land-development/construction project		
Site Supervisors	Ensure compliance with OSHA safety standards	Ongoing, with internal "audit" Fall 2010	

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	Reduce by 25% the # of warranty calls from prior year and improve average cycle-time to complete warranty items by 50% (within 5 days of call-in)		In partnership with Homeowner Services' education services. FY09_10 call volume: 57 (compared to 69 the previous FY). Average cycle-time FY09_10: 10 days (compared to 16 days the previous FY).
Construction & Land Development - Danny			
Betsy and site supervisors	Increase per house construction in-kind donations by minimum of 5%		e.g. softwood lumber GIK @ \$6K/house
Homeowner Services - Lori			
	Work to minimize > than 90-day delinquencies		ongoing
	Implement 8 hrs of HUD-certified counseling for CDP homeowners		effective on the 9/11/10 homes and through 35 homes at CDP within the next 3 years
	Determine viability/appropriateness of launch of a maintenance reserve program	Determine go/no-go in Fall 2010	
	Determine viability/appropriateness of launch of reporting payment histories to credit bureaus	Determine go/no-go in Fall 2010	
	Quality improvements in homeowner education curriculum, lesson plans, and a diverse array of skilled presenters		
	Randomized sample comparison of socioeconomic benefits of Habitat homeownership	by end of FY	in partnership with UA?
Patty	Launch individual development account program		in partnership with which bank?
Michael	Launch Habi-preneurs microlending partnership with Accion	by end of FY	
Barbara	Launch celebration ceremonies for homeowners who pay-off their mortgages	by 2nd quarter	
Financial/Administrative Services - Michael/Lynn			
	Produce full-set of monthly financials within 3 & 1/2 weeks of month end		
	Retire minimum of 10% of FY09_10 outstanding debt balance		10-Apr
Lynn	Getting new auditors up-to-speed		

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Lynn	Set-up NSP2 accounting & reporting system		
Danny/Lynn	Launch "table-funded" mortgage sale transactions	be ready to implement spring 2011	in partnership with Homeowner Services
	Secure alternate WISH provider		
Financial/Administrative Services (continued) - Michael/Lynn			
	Implement NMTC program		Spring 2011?
	Implement highly visual operating dashboard of key metrics	Fall 2010	
Judy	<20% increase in benefit costs		
Judy	Maintain office system costs at FY09_10 levels		
Michael	Research feasibility and logistics of alternative financing strategies, including issuing tax-exempt bonds through State's Community Facilities District statutes		
Judy	Implement password-protected Board section of the website	Summer 2010	in partnership with Amanda
Michael	Temporary and permanent financing for owned HabiStore facility		
Community Development, Marketing, & Volunteer Services - Barbara			
	At a minimum, increase direct-mail revenue by 1% over FY09_10 actuals. Increase tax-credit revenue by 25% over FY09_10 levels		
	Increase both the number of major donors (>\$1K/annum donors) and their cumulative giving by min. 5%. Also increase average gift size of all donations by 5%		Thru 4/10: 163 \$1k+ donors cumulatively giving \$772K. Average gift-size of all cash philanthropy donors: \$353.
	Develop and utilize "moves management" tool on a monthly basis with management team, the development staff, and volunteer leadership for both our cash and in-kind donors.		
	Hold at least 2 house parties for major donors/prospects		goal: at least 1 in fall and 1 in spring

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	In partnership with the 3 volunteer working committees of the Santa Cruz Valley Chapter, maintain level of support from the Green Valley area	Ongoing	
	Maintain Charity Navigator 3-Star rating; and continually update our Guidestar Exchange Seal data		
Community Development, Marketing, & Volunteer Services (continued) - Barbara			
Amanda	1. 12 media hits/month. 2. Increase web-giving by 25%. 3. Increase e-newsletter sign-ups by 15%. 4. Increase Facebook fans by 100 people 5. Launch active Speakers Bureau.		Re-launch the PR & Marketing Committee. May 2010 Facebook fan # is 147.
Hailey	Develop crew-leader recruitment, orientation, ongoing training, retention, & recognition program	Ensure full implementation Fall 2010	Focus: crew leader development, as well as housing advocacy moments through Danny's HabiMinute program
	Collectively, Habitat staff contribute at least 400 hours during the fiscal year to the common good through our non-Habitat community service voluntarism		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.
	Tool Box Bash event for Fall 2011 or Spring 2012		Rosey Koberlein to chair
	Prep for a planned giving campaign in 4th quarter or 1st quarter of the following FY		Utilize consultant Pamela Dougherty?
	Prepare for a \$2M HabiStore capital campaign		
Danny	Launch in-kind services as part of bid process, and clearly define Departmental roles & responsibilities in the in-kind gift cultivation, solicitation, and acknowledgement process	Summer 2010	Partnership between Construction and Community Development Departments
	Develop a ceremony/celebration for homeowners who pay-off their mortgages	Beginning Fall 2010	
Retail Operations - Terry			
	At a minimum, maintain gross profit (i.e. factoring out inkinds) margin at the FY09_10 full-year level.		

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	Negotiate favorable new lease terms for 2.5 year renewal		
	Pursue 2 new location tracks: a) purchase existing building; b) design/build purchase-eppty		Work with Mick Cluck. Owning our own facility may be the most effective "endowment" ever for Habitat, as that permanent asset will generate increasing profits to Habitat's mission.