

## LEARNINGS FROM THE PAST AND PRESENT

### Trends:

1. Government funding is declining
2. Every town has a "that house" that needs repairs
3. NR efforts are a funding priority
4. Corporations want to build where located

### Opportunities:

5. Funding for ABWK and Critical Home Repair is increasing
6. Rehabs cost typically less than new construction
7. Funders want outcome impact data
8. Critical home repair/ABWK can diversify funding sources

### Challenges/Threats:

1. Marketing our mission better.
2. Sea of housing stock that is sitting, as well as home owner occupied houses in need of repair.
3. The ability to develop new revenue streams
4. Comprehensive, coordinated and systemic responses are emerging as a best practice for better

### Opportunities:

5. Individual giving is an untapped opportunity.
6. Our state is focused on school excellence and housing stock availability.
7. Planned giving is an opportunity
8. Engage millennials and young professionals

### Challenges/Threats:

1. Federal and state funding is declining
2. Environmental and policy changes will force us to build new homes to higher standards and increase costs.
3. Changes to federal tax law around giving
4. Fiscal problems at the state level.
5. Lack of fundraising support by local, state and national

## CORE FOCUS

### CORE PURPOSE

**VISION:** A world where everyone has a decent place to live.  
*Why do we exist?*

**MISSION:** Seeking to put God's love into action, Habitat for Humanity brings people together to build homes, communities and hope.  
*What do we do?*

**MISSION PRINCIPLES:** Focus and advocate for affordable housing  
Promote dignity and hope  
Support sustainable and transformational development  
*How will we succeed?*

**VALUES:** A shared work ethic between partner families, volunteers and the Habitat team.  
*The Foundations on Which We Build: How do we behave?*

### 3 YEAR TARGETS

**Future Date:** 06/30/2021

**New Homes/Rehabs** (80% in Hartford/ 20% outside) (min 5 new homes per year) 10

**Critical Home Repairs** 12

**ABWK** 20

**Financial Freedom Center** 20

**Total Families Served** 62

### 1 YEAR TARGETS

**Future Date:** 06/30/2019

**New Homes/Rehabs** (80% in Hartford/ 20% outside) (min of 5 new homes per year) 5 new / 3 rehabs

**Total Families Housed** 8

**Critical Home Repairs** 5

**ABWK** 15

**Financial Freedom Center** 15 (10 non Habitat families)

**Total Families Served** 33

## 3 YEAR PLAN

### Outcome Priorities

#### Strategic Theme 1: Build Community Impact.

1. Increased and sustained affordable homeownership in prioritized neighborhoods, in alignment with the **Housing Program Guiding Principles**.

2. Increased financial literacy of Habitat families and others from prioritized neighborhoods.

3. Habitat families believe that Habitat has improved their quality of life.

#### Strategic Theme 2: Build Sector Impact.

1. All Habitat stakeholders are meaningfully engaged in support of Habitat's programs and activities.

#### Strategic Theme 3: Build Societal Impact.

1. Habitat homeowners are engaged in the civic life of their communities.

2. Habitat is represented in relevant housing coalitions, campaigns, and conversations.

#### Strategic Theme 4: Build a Sustainable Organization.

1. Affiliate activities are monitored to support continuous improvement.

2. A strong affiliate financial position is supported by sound financial management.

3. The affiliate's Resource Development Plan supports strategic priorities.

4. The ReStore effectively supports our mission.

### Performance Measures

# Homes completed (new, rehab).  
# 'Critical Home Repair' (CHR) projects completed.  
# 'A Brush with Kindness' (ABWK) projects (blocks) completed.

# Individuals successfully completing 1+ elective FFC program.

% Surveyed Habitat households reporting that Habitat has improved their quality of life.

The drafting, adoption, and execution of a **Marketing & Communications Plan** and a **Volunteer Engagement Plan**, each of which includes approaches, measures, and targets tailored to specific stakeholder groups.

% Habitat households with 1+ active Habitat Ambassador.

% Relevant housing coalitions, campaigns, and conversations (as determined by the Staff and Board) with Habitat representation.

Departments and activities meeting annual goals.  
The drafting, adoption, and execution of a **Board Governance Checklist**.

The meeting (or exceeding) of budgetary and other financial goals.  
The adherence to the **Habitat Financial Policies and Procedures Affiliate Operations Manual** and other governing documents.

The drafting, adoption, and execution of a **Resource Development Plan** that includes approaches, measures, and targets tailored to specific stakeholder groups.

Net income.  
Net income margin.

### Targets

Yr 1: 8. Yr 3: 10/yr.  
Yr 1: 2. Yr 3: 4/yr.  
Yr 1: 15. Yr 3: 20/yr.

Yr 1: 15. Yr 3: 25/yr.

100%

Drafting and adoption by Dec. 2018;  
Execution starting by Jan. 2019.

Yr. 1: 20%; Yr. 3: 30%.

Yr. 1: 100%; Yr. 3: 100%.

100% of departments and activities  
Drafting and adoption by Dec. 2018;  
Execution starting by Jan. 2019.  
100%  
100% adherence.

Drafting and adoption by Dec. 2018;  
Execution starting by Jan. 2019.

Yr. 1: \$112k; Yr. 3: \$150k.  
Yr. 1: 12%; Yr. 3: 15%.

## STAFF ANNUAL ACTIONS

### 2018-2019 Annual Goals

### Who

1. Create outcomes and impact evaluation system and methodology for family outcomes. Karraine: 3
2. Establish baseline Quality of Life and Housing surveys. Tracy: 1,2
3. Develop stories of impact and affiliate case for support. Team: 7, 8
4. Create expanded marketing materials for Restore to gain customers and donations. Matt: 8,9
5. Create staff reward system, staff training and professional development plans for all employees. Karraine: 4, 5
6. Improve delinquencies and foreclosure rates. Tracy: 6
7. Expand individual giving program. (Ind, planned giving, major gifts and flow of volunteers to donors) Rose: 8
8. Increase qualified and skilled volunteers. Kris: 4, 5

## BOARD ANNUAL ACTIONS

### 2018-2019 Annual Goals

1. Develop and use an annual board governance checklist to ensure we consistently accomplish our duties as a governing body.
2. Formalize a recurring opportunity within board meetings to receive and review information (including financials, operational reports, metrics, etc.) to ensure the strategic plan is being executed effectively.
3. Formalize development plans and periodic check-ins for each board member, including their interests, goals and opportunities to strengthen their involvement within the affiliate.
4. Develop and execute a plan to strengthen the board's collective knowledge of topics important to the affiliate (covering such topics as finance, operations, neighborhood revitalization, and fund development).