



FY '06 Annual Plan
(June '05-July'06)

Goal 1: New and renovated housing provides families with an opportunity to earn and own a decent, affordable home.

Strategy 1: Acquire an inventory of land sufficient to meet program needs and for long-term land banking.

Staff Lead: By:

Acquire land to build 10-15 houses by August 2005 for groundbreaking August 2006		
• Finalize agreement to purchase 15 fully developed lots at New Columbia	Steve	Aug
• Identify funding to pay for lots at New Columbia	Steve	May
Explore land banking for long term building needs		
• Research tax laws regarding holding land	Steve	January
• Develop Strategy for land banking and create land acquisition criterion.	Steve	January
• Begin campaign to educate public about Habitat's need for land.	Steve/Erika	November
Develop Land Acquisition Committee that pursues opportunities for donations and purchases year round.		
• Recruit 4-8 members to the committee with diverse skills related to land acquisition	Steve/Jen	September
• Create and document land acquisition process	Steve	January
Apply for any available lots through Multnomah County Lots program and lobby for program not to increase threshold criteria that would exclude Habitat.		
• Assess Habitat's current Multnomah County Lots application and make necessary changes that meet criterion while staying true to the mission.	Steve	August
• Develop relationship with program committee and educate them on the benefits of the Habitat model.	Steve	November
• Apply for all lots that meet PHFH's land acquisition criterion.	Steve	January

Explore partnership opportunities with nonprofit and for-profit developers.		
<ul style="list-style-type: none"> Implement partnership with Hacienda and explore similar partnerships with other CDCs. 	Steve	June
<ul style="list-style-type: none"> Explore partnership with for-profit developers on Requests for Proposals from the Portland Development Commission. 	Steve	Ongoing
<ul style="list-style-type: none"> Explore partnership with Portland Community Land Trust 	Steve	Ongoing
Explore land acquisition and development funding options through Federal Home Loan Bank (FHLB) and public/governmental programs		
<ul style="list-style-type: none"> Analyze all potential funding opportunities through FHLB and apply for funds when applicable. 	Steve/Sue	Ongoing
<ul style="list-style-type: none"> Develop relationship with Portland Development Commission (PDC) to create innovative partnerships that result in donated land or funding for land 	Steve/Sue	Ongoing
<ul style="list-style-type: none"> Explore partnership with Enterprise Foundation with focus on Land Acquisition 	Steve/Sue	Januar
<ul style="list-style-type: none"> Apply for SHOP funding for maximum number of lots available 	Steve/Tim	September

Strategy 2: Construct new single-family and multi-family homes.

Start and complete 16 homes at Lambert and start 4 homes at New Columbia		
<ul style="list-style-type: none"> Maintain consistent construction schedule throughout year 	Sky	Ongoing
<ul style="list-style-type: none"> Assess, revise and implement condominium process well ahead of completion date. 	Jaimi/Tim	December
<ul style="list-style-type: none"> Maintain quality control through weekly inspections 	Sky	Ongoing
<ul style="list-style-type: none"> Solicit temporary donated warehouse space to keep project moving forward despite weather conditions. 	Steve	July
<ul style="list-style-type: none"> Coordinate all aspect of home builder participation in Builders Blitz (June '06) and lead monthly meetings. 	Steve/Sky	June

Hire and Train Construction site superintendent as third construction staff person		
<ul style="list-style-type: none"> Assess current construction department and identify skill set needs for new hire. 	Sky/Steve	July
<ul style="list-style-type: none"> Revise job description and post to being recruiting process 	Sky	August
<ul style="list-style-type: none"> Hire 3rd construction staff person 	Sky	September
Develop detailed house take-off list and budget		
<ul style="list-style-type: none"> Finalize house take-off list and budget for Lambert with actual bids on all line items. 	Sky/Tim	July
<ul style="list-style-type: none"> Update take-off list and budget when necessary 	Sky/Tim	Ongoing
Create and implement cost tracking and monitoring system		
<ul style="list-style-type: none"> Create system for tracking all construction costs and in-kind donations 	Sky/Tim	July
<ul style="list-style-type: none"> Keep construction budget and expenses updated 	Sky/Tim	Ongoing
<ul style="list-style-type: none"> Create monitoring system to ensure construction purchases stay on budget 	Sky/Steve	July
Develop Construction schedule utilizing project management software		
<ul style="list-style-type: none"> Download Microsoft Project onto all appropriate computers and get the necessary training. 	Sky	July
<ul style="list-style-type: none"> Create 16-home Lambert schedule using software 	Sky	July
<ul style="list-style-type: none"> Implement volunteer scheduling in connection with construction schedule 	Jen/Sky	August
<ul style="list-style-type: none"> Create procedures for using Microsoft Project for construction and volunteer scheduling 	Sky/Jen	May
Provide Construction training to regular volunteers and homeowners		
<ul style="list-style-type: none"> Adapt Cornerstone Training to meet PHFH's construction program 	Sky	July
<ul style="list-style-type: none"> Develop plan for implementing Cornerstone program 	Sky/Jen/Jaimi	July
<ul style="list-style-type: none"> Recruit participants and begin training first class of volunteers and homeowners 	Sky/Jen/Jaimi	September
<ul style="list-style-type: none"> Evaluate program and identify opportunities for improvement 	Sky/Jen/Jaimi	February

Create and implement worksite safety plan		
• Update safety plan to include implementation plan and resources	Sky	August
• Recruit and train volunteers to help facilitate safety plan	Sky/Jen	October

Goal 2: HFH partner families make successful transition to homeownership, equipped to succeed financially and become contributing members of their community.

Strategy 1: Provide limited case-management to families participating in Habitat program.

Match every family with a family partner upon selection		
• Recruit family partner volunteers sufficient to meet needs	Jen/Jaimi	September
• Provide training and regular support to Family Partners	Jaimi	Ongoing
Meet individually with all families who fall two months into arrears		
• Finance Director and Family Services Manager make contact and meet with families as soon as second payment is missed to identify problem and potential solutions.	Tim/Jaimi	Ongoing
• Executive Director meets with family once 3 rd payment is missed to assess situation and identify options.	Steve/Tim/Jaimi	Ongoing
• Being revising delinquency policy to better accomplish goals	Tim/Jaimi	April
Provide support and guidance to Condominium Association		
• Meet monthly with 44 th /Killingworth homeowners to address issues and provide continued training on Homeowners Association.	Steve/Jaimi/Tim	July-Oct.
• Successfully transition Condo Association leadership officially over to homeowners	Tim/Steve/Jaimi	October
• Participate regularly in Condo Association meetings, mentor Condo leadership and help address issues	Steve/Jaimi/Tim	Ongoing
• Manage all financial transactions of Condo Association and provide regular financial updates to Condo leadership	Tim	Ongoing
• Evaluate success of Condo Association at 44 th /Killingsworth	Jaimi/Tim/Steve	March

Strategy 2: Connect partner families to social service resources that can help them succeed.

Create resource list and provide to families upon selection		
<ul style="list-style-type: none"> Research social services and other resources that may help Habitat partner families succeed 	Jaimi	September
<ul style="list-style-type: none"> Assess availability and appropriateness of resources through making contact with agencies, and finalize list. 	Jaimi	February

Strategy 3: Support equity development among Habitat homeowners while maintaining affordability to the family

Review and revise policy for setting house costs and mortgage lengths with affordability continuing to be a priority		
<ul style="list-style-type: none"> Asses current policy and identify opportunities for improvement 	Steve/Tim/Jaimi	August
<ul style="list-style-type: none"> Revise policy for Lambert units to better meet goals, and propose to executive committee 	Steve/Tim/Jaimi	September
Review current mortgage models and revise to better accomplish mission and goals		
<ul style="list-style-type: none"> Research and gather diverse models from other urban affiliates 	Jaimi/Steve	November
<ul style="list-style-type: none"> Assess aspects of other models and create 2-3 different models to compare short and long term impact on families and PHFH. 	Steve/Jaimi/Tim	Februar
<ul style="list-style-type: none"> Propose new model(s) to board of directors 	Steve/Jaimi	March

Strategy 4: Provide comprehensive education program that includes both pre- and post-purchase counseling.

Conduct survey and interviews with current homeowners to evaluate Habitat program and impact		
<ul style="list-style-type: none"> Utilize summer intern to create and help implement survey and interviews 	Jaimi	August
<ul style="list-style-type: none"> Finalize interviews and compile data for assessment 	Jaimi	October
<ul style="list-style-type: none"> Report results 	Jaimi	December

Develop comprehensive education program that includes extensive fiscal management training		
• Identify task force to take on project of developing education program.	Jaimi	August
• Research programs from other urban affiliates	Jaimi	September
• Develop goals and outline of program	Jaimi	October
• Identify potential long term partner organizations/corporations and meet with them to assess what they have to offer and their level of commitment.	Jaimi	November
• Finalize program and submit to board of directors	Jaimi	December
Begin Implementing pre-purchase program on families moving into Lambert Condominiums		
• Develop program schedule and inform families	Jaimi	January
• All Lambert families complete pre-purchase program	Jaimi	May

Goal 3: Become a credible and recognized voice for the cause of decent affordable housing for all Portlanders

Strategy 1: Develop Portland Habitat for Humanity advocacy agenda

Lead:

By:

Develop advocacy agenda for key policy discussions		
• Gather advocacy information and policies from HFHI and other affiliates	Steve	December
• Identify task force to define advocacy for PHFH and propose advocacy agenda	Steve/Jen	January
• Board approves advocacy agenda and policy	Steve	May

Strategy 2: Increase Habitat's visibility as an advocate for decent, affordable housing.

Incorporate educational advocacy into all PHFH publications and press releases		
• Define language used to deliver affordable housing message in publications and press	Erika	September
• Incorporate language in all print and electronic publications	Erika	October

Gain support from PHFH constituents (volunteers, donors) as advocates for PHFH and affordable housing.

<ul style="list-style-type: none"> Develop action plan for educating constituents about affordable housing issues and how to be an advocate. 	Erika	September
<ul style="list-style-type: none"> Incorporate “call to action” in electronic and print newsletter to constituents 	Erika/Jen	October
<ul style="list-style-type: none"> Utilize construction site as forum for educating volunteers and calling them to action 	Jen	September

Strategy 3: Build strong presence within affordable housing community helping shape the environment in which Habitat works.

Build effective relationships with elected or appointed officials

<ul style="list-style-type: none"> Identify target group of officials to build relationships with 	Steve	July
<ul style="list-style-type: none"> Invite key officials to major events and to volunteer on site 	Erika	Ongoing
<ul style="list-style-type: none"> Educate target group of officials about PHFH through individual meetings 	Steve	June
<ul style="list-style-type: none"> Consider hosting Congressional Build 	Steve	February

Join and participate in Community Development Network as voting member

<ul style="list-style-type: none"> Send PHFH representative to all meetings and events 	Steve	Ongoing
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Goal 4: HFH has the right people in the right places to make it all happen

Strategy 1: Recruit and develop program volunteers to support all aspects of the organization

Develop formal Volunteer Program (policies, procedures, job descriptions, etc.)		
• Research volunteer programs from other affiliates and organizations	Jen	August
• Overview and Organization of Volunteer Program	Jen	July
• Volunteer Job descriptions	Jen	August
• Recruitment Plan	Jen	September
• Orientation and trainings	Jen	October
• Supervision	Jen	November
• Evaluation, Positive Corrective Action and Termination	Jen	November
• Retention and Recognition	Jen	December
• Volunteer staff relations	Jen	December
• Risk Management	Jen	January
• Measuring volunteer Program Effectiveness	Jen	January
• Enhancing the Volunteer Program	Jen	February
	Jen	February
Formalize Committee structure and populate committees		
• Finalize committee handbook including job descriptions for all committees	Jen	July
• Regular scheduled meetings are scheduled for all committees	Jen	September
• Committees have committed regular volunteers	Jen	October
• Structure developed for cross pollination of committees	Jen	September
• Committees create annual plans	Jen	January
• Succession plan in place for identifying and nurturing committee chairs	Jen	January
Improve volunteer scheduling, tracking and reporting to meet needs		
• Create electronic calendar for scheduling volunteers	Jen	July
• Distribute monthly report on scheduled volunteer groups	Jen	August
• Capture all volunteer hours, including committees	Jen	December
• Develop format for reporting volunteer contributions	Jen	December
• Explore web-based scheduling	Jen	June

Strategy 2: Recruit leaders to serve on the Board of Directors

Implement board survey and self assessment, and strategically recruit 4 new board members		
• Implement survey and self assessment	Steve	September
• Identify strategy and plan for recruiting new members	Steve	October
• Board Development Committee nominates 2 people to the board	Steve	December
• Board Development Committee nominates 2 additional people	Steve	March
Implement Board Development Committee year-round recruiting		
• Identify 3-4 member Board Development Committee	Steve	September
• Board Development Committee develops annual recruitment plan	Steve	October
• Committee begins meeting regularly to strategize on annual plan implementation	Steve	November
Intentionally populate committees with potential future board members		
• Educate board and Board Development committee about PHFH's committee structure	Steve/Jen	August
• Board Development committee works with volunteer coordinator to recruit potential future board members to committees, and to identify potential nominees from committees.	Steve/Jen	Ongoing

Strategy 3: Hire and support professional staff to lead program implementation

Create and implement professional development plan for all staff		
• All staff have completed Job Plans that include Development Plans	Steve	July
• Job plans are reviewed quarterly	Steve	Oct./Jan./April/July
Provide staff with opportunities for career development		
• Support each staff in identifying career goals and exploring career options within Habitat or related organizations.	Steve	September
• Identify experiential opportunities for staff to develop new skills and professional experience.	Steve	Ongoing

Goal 5: HFH has adequate funding from a diversity of sources to meet budget goals.

Strategy 1: Expand financial support from individuals

Lead:

By:

Establish and implement donor cultivation plan		
• Send welcome packet to new donors	Erika	Ongoing
• Strategically carry out direct mail program encouraging donors to consider giving more	Erika	Ongoing
• Implement timely thank you letters and calls and customized thank-yous to match gifts	Erika/Glenna	July
• Identify and implement donor recognition event(s)	Erika/Sue	January
• Equip and engage board members in identification and solicitation of donors	Erika	Ongoing
• Develop plan for cultivating and increasing gifts of major donors	Erika	August
• Hold regular cultivation events - home dedications, groundbreaking, build event, etc.	Erika	Ongoing
• Research and begin developing Planned Giving Program	Erika	June
Acquire 1,700 new donors		
• Implement Direct Mail acquisition through Russ Reid through “no risk” offer.	Erika	October
• Increase “in memory” and “In honor” gifts through expanding Holiday Market to beyond Christmas and other targeted efforts.	Erika	October
• Develop program to move volunteers to becoming donors	Erika	September
• Hold annual Fundraising Breakfast with increased participation from new donors.	Erika	May
Increase percentage of donors maintained from 35% to 45%		
• Research and analyze donor retention and attrition	Erika	July
• Develop and implement plan to reach out to lapsed donors	Erika	August
• Expand/increase number of Carpenter Club members - monthly givers.	Erika	Ongoing
• Restructure Direct Mail program to include annual renewals.	Erika	Ongoing
• Focus on multi-year pledges from Major Donors	Erika	Ongoing

Strategy 2: Enhance shared revenue programs that benefit PHFH and other affiliates

Update ReStore work plan and financial goals		
<ul style="list-style-type: none"> Evaluate significance of new location and increased hours on expected future revenue. 	Tom	August
<ul style="list-style-type: none"> Update ReStore 3-year work plan 	Tom	September
<ul style="list-style-type: none"> Create financial goals and budget for ReStore 	Tom	October
Develop an active ReStore advisory committee		
<ul style="list-style-type: none"> Create job description for advisory committee(s) 	Tom	July
<ul style="list-style-type: none"> Populate committee(s) with people who have diverse related skills 	Tom	September
<ul style="list-style-type: none"> Create work plan for advisory committee 	Tom	November
Assess Vehicle Program performance and impact of new tax laws		
<ul style="list-style-type: none"> Research and assess impact of new tax laws on PHFH's and other vehicle programs 	Glenna	September
<ul style="list-style-type: none"> Identify opportunities to improve program and increase profits based on research findings. 	Glenna/Steve	March

Strategy 3: Expand financial and in-kind support from local corporations

Commitments from House Sponsors for Lambert totaling \$400,000		
<ul style="list-style-type: none"> Continue aggressively pursuing repeat and new sponsors 	Sue	Ongoing
<ul style="list-style-type: none"> Identify and implement innovative and unique opportunities for house sponsorship (faith build, youth build, women build.) 	Sue	December
Raise \$125,000 in undesignated funds through corporate giving campaign		
<ul style="list-style-type: none"> Research and recruit corporations who provide matching funds for employee donations or volunteer hours. 	Sue	August
<ul style="list-style-type: none"> Proactively encourage cause-marketing with desired partners. 	Sue	October

Increase participation in Team Habitat		
• Develop and implement Team Habitat marketing plan	Sue	September
• Invite former Team Habitat participants to sign up again this year	Sue	July
• Explore opportunities for ongoing Team Habitat partnerships	Sue	December
Commitments from General Contactors to sponsor 4 homes		
• Manage successful partnership with Walsh Construction as model for General Contractor sponsorships.	Steve/Sky	Ongoing
• Approach 3-4 additional General Contractors about sponsoring a home at Lambert	Steve/Sky	September

Strategy 4: Manage mortgage assets to leverage funding to support organizational and production capacity.

Develop long-term strategy for leveraging mortgage assets to increase production and capacity		
• Research and approach potential financial partners for leveraging mortgages.	Steve	September
• Get commitments from 2-3 financial partners that meet our needs	Steve	November
• Assess and create document explaining long-term impact on organization of utilizing different mortgage asset programs.	Steve	November
Leverage mortgages resulting in at least \$400,000 in revenue		
• Assess available financial partners and decide which best meets PHFH's current needs.	Steve	March
• Implement asset recovery program resulting in revenue	Steve	May

Strategy 5: Increase support and revenue from service, youth and faith groups.

Provide leadership to Building on Faith event in collaboration with metro-area affiliates		
<ul style="list-style-type: none"> Identify Building on Faith Committee to lead recruitment and planning effort 	Jen/Erika	July
<ul style="list-style-type: none"> Target faith organizations not yet involved 	Erika	August
<ul style="list-style-type: none"> Target youth groups from faith organizations 	Erika	August
<ul style="list-style-type: none"> Hold successful Building on Faith week event 	Erika	September
Increase number of faith, youth and service group partners, and level of commitment for existing partners		
<ul style="list-style-type: none"> Increase participation and activity of Speakers Bureau 	Jen/Erika	Ongoing
<ul style="list-style-type: none"> Meet with current partners to explore expanding their involvement in Habitat 	Sue	December
<ul style="list-style-type: none"> Customize fundraising ask to meet the groups interest, capability and decision making process. (house sponsorship, tithes, etc.) 	Sue	Ongoing

Strategy 6: Seek foundation support for special projects and building capacity

Create and implement quarterly plan for submitting grants to private and corporate foundations		
<ul style="list-style-type: none"> Identify fundable projects for grant support. 	Sue	July
<ul style="list-style-type: none"> Finalize plan and update quarterly 	Sue	July
<ul style="list-style-type: none"> Write grants on deadline 	Sue	Ongoing
<ul style="list-style-type: none"> Build relationships with trustees and board members 	Sue	Ongoing
Explore opportunities for utilizing public and government funding		
<ul style="list-style-type: none"> Research and explore potential untapped public and government funding sources 	Steve/Sue	August
Build relationships with key government leaders and decision makers	Steve/Sue	Ongoing

Goal 6: The public understands and values the work of Portland Habitat for Humanity

Strategy 1: *Create a clear and common message about the work of Habitat for Humanity in the Portland Metro area*

Lead:

By:

Develop marketing committee that creates Marketing Plan		
• Build marketing committee of people with diverse backgrounds	Jen/Erika	July
• First draft of marketing plan	Erika	August
• Finalize and begin implementing plan	Erika	September
• Incorporate detailed media plan in marketing plan	Erika	September

Strategy 2: *Promote Habitat through electronic and print materials, and via public media outlets*

Create Consistent and professional printed marketing material		
• Implement New Logo and Brand into all new resources	Erika	July
• Create brochure	Erika	November
• Print and distribute annual report	Erika	October
• Print and distribute newsletter on-time and within budget	Erika	ongoing
Increase electronic marketing		
• Implement electronic newsletter	Sue/Erika	August
• Create cross linking web strategy and implement	Sue/Erika	October
• Plan for strategic redesign of web site	Sue/Erika	June

Strategy 3 *Hold special events to raise awareness*

Identify Major Portland event to join in (Street of Dreams, Rose Festival, etc)		
• Create list of potential events and begin contacting leaders to assess partnership opportunity	Erika	July
• Identify targeted events to propose partnership with	Erika	August
• Get commitment from event leaders to incorporate Habitat into event	Erika	October

Nurture relationship with external groups who want to plan events for Habitat		
• Provide assistance to groups wanting to coordinate a HFH event	Sue	ongoing
• Contact groups who have held events for HFH in past to explore repeat opportunities	Sue	ongoing ongoing
Identify and begin planning for event commemorating PHFHs 25th anniversary		
• Dedicate staff meeting to brainstorming	Steve	January
• Identify planning committee to solidify event plans and begin implementing	Erika	April

Goal 7: PHFH has the systems and infrastructure to fully support the work of the organization.

Strategy 1: Document policies and procedures that guide operations.

Create policies and procedures manual		
• Finalize table of contents for manual	Tim	August
• Create first draft of manual for review	Tim	October
• Submit manual to board of directors for approval	Tim	December

Strategy 2: Have board and operating committee structure that best supports the plan

Assess, formalize and populate board committees		
• Assess current board committee structure and identify necessary changes to meet goals	Steve	November
• Create job descriptions for all board committees	Steve/Jen	December
• Board Development Committee leads effort to populate all board committees	Steve	March

Strategy 3: Expand the data management capacity of the organization

Upgrade to Raiser's Edge 7 and provide appropriate staff with training		
• Upgrade to Raiser's Edge 7	Sue/Erika	August
• Hold 3-day training for all staff who will use Raiser's Edge	Sue/Erika	August
• Rebuild and improve reports and queries in new system	Sue/Erika	August

Purchase Project Management software and provide training to construction staff

• Download software on all appropriate computers	Sky	July
• Ensure staff have training necessary to utilize software	Sky/Steve	August