



BACKGROUND TO THE STRATEGIC PLAN

Portland Habitat for Humanity (PHFH) was formed as an affiliate of Habitat for Humanity International in 1981. The organization has completed 100 homes during its first 23 years, and is preparing itself to nearly double that production over the next 5 years.

Each of these homes has been produced using the same unique Habitat formula: extensive use of volunteer labor, donations of construction materials, and generous cash contributions from individuals, corporations, churches, foundations and organizations. In addition each Habitat for Humanity homeowner supplies 500 hours of sweat equity to the construction of their home.

STRATEGIC PLANNING PROCESS

In summer 2004, PHFH was selected by Habitat for Humanity International and the Wilder Foundation to participate as one of five affiliates in the Urban Strategies Initiative. Through financial and human resources, this initiative has provided the organization with a thorough organization-wide assessment that became the foundation for a subsequent strategic planning effort.

The assessment was completed in late 2004, and the strategic planning process was kicked off with a two-day retreat in early December with the full staff and board. The retreat was a rich discussion that yielded decisions regarding the organization's long-term strategies and generated consensus for improving the mission, vision and value statements for the organization. The Strategic Planning Committee, together with their consultant and with support from the full staff and board, met over the next 5-months in a variety of settings to finalize decisions.

Portland Habitat for Humanity is a complex and ambitious organization, which accounts for the sizeable number of goals and strategies developed for this three year plan. A few of the over-arching themes in this plan include **increasing production, building capacity, leveraging our assets and the Habitat name, and strengthening community development efforts and impact** through collaboration with neighboring Habitat affiliates and other organizations. What follows are the newly approved mission, vision and values statements, and the goals and strategies that have been established.

CONCLUSION

These are indeed challenging times for low-income families who are trying to obtain affordable shelter in Portland. House prices and unemployment rates in the Portland metro area have reach an all time high, while low income households have seen little increase in the purchasing power of their paychecks.

As an organization devoted to its vision of a community where "everyone has a simple, decent, affordable place to live; and where poverty housing is unacceptable", Portland Habitat for Humanity has worked over these past 23 years to make affordable homeownership a reality for more than 100 families. As we look toward the future, we are dedicated to serving even more families, and doing so in partnership with thousands of people for whom decent, affordable shelter is a matter of conscience.



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VISION

A community where everyone has a simple, decent, affordable place to live; and where poverty housing is unacceptable.

MISSION STATEMENT

Portland Habitat for Humanity builds partnerships among volunteers, families and the community to transform lives and revitalize neighborhoods by enabling families in need to earn and own a simple, decent, affordable home.

VALUES

Our Christian heritage calls on us to set aside religious differences and work together toward a common goal. These values guide our work:

- **Diversity and Inclusiveness** – We believe that everyone — regardless of race, ethnicity, nationality, religion or socioeconomic status — deserves a simple, decent place to live, and has something to contribute in building homes and hope for the good of all.
- **Homeownership** – We believe in the power of homeownership to affirm dignity, encourage hope and transform lives by breaking the cycle of poverty.
- **Families as Partners** – We believe that dignity is promoted not simply by living in an adequate house, but by fully contributing to the process of building and buying that home and helping others acquire adequate shelter.
- **Volunteerism** - We believe in the volunteer spirit and are committed to offering rewarding volunteer experiences.
- **Stewardship** – We are committed to excellence, to efficient use of our financial, environmental and human resources, and we are accountable to our funders, volunteers, and family partners.

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PROGRAMMATIC GOALS AND STRATEGIES

- 1. *New and renovated housing provides families with an opportunity to earn and own a decent, affordable home.***
 - A. Acquire an inventory of land sufficient to meet program needs and for long-term land banking.
 - B. Construct new single-family and multi-family homes.

- 2. *HFH partner families make successful transition to homeownership, equipped to succeed financially and become contributing members of their community.***
 - A. Provide limited case-management to families participating in Habitat program.
 - B. Connect partner families to social service resources that can help them succeed.
 - C. Support equity development among Habitat homeowners while maintaining affordability to the family.
 - D. Provide comprehensive education program that includes both pre- and post-purchase counseling.

- 3. *Habitat is a credible and recognized voice for the cause of decent affordable housing for all Portlanders.***
 - A. Develop Portland Habitat for Humanity advocacy agenda.
 - B. Increase Habitat's visibility as an advocate for decent, affordable housing.
 - C. Build strong presence within the affordable housing community helping shape the environment in which Habitat for Humanity works.
 - D. Build effective relationships with local staff and elected or appointed officials.

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ORGANIZATIONAL GOALS AND STRATEGIES

- 4. *HFH has the right people in the right places to make it all happen.***
 - A. Recruit leaders to serve on the Board of Directors.
 - B. Hire and support professional staff to lead program implementation.
 - C. Recruit and develop program volunteers to support all aspects of the organization.

- 5. *HFH has adequate funding from a diversity of sources to meet budget goals.***
 - A. Expand financial support from individuals.
 - B. Enhance shared revenue programs that benefit Portland Habitat and other affiliates.
 - C. Expand financial and in-kind support from local corporations.
 - D. Increase support and revenue from the faith community.
 - E. Seek foundation grant support for special projects and capacity building efforts.
 - F. Increase revenue from organizations
 - G. Manage mortgage assets to leverage funding to support organizational and production capacity.

- 6. *The public understands and values the work of Portland Habitat for Humanity***
 - A. Create a clear and common message about the work of Habitat for Humanity in the Portland Metro area.
 - B. Promote Habitat through electronic and print materials, and via public media outlets.
 - C. Hold special events to raise awareness.

- 7. *HFH has the systems and infrastructure to fully support the work of the organization.***
 - A. Document policies and procedures that guide operations.
 - B. Have board and operating committee structure that best supports the plan.
 - C. Expand the data management capacity of the organization.

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

Strategy	FY 2006	FY 2007	FY 2008
<p align="center">Acquire an inventory of land sufficient to meet program needs and for long-term land banking</p>	<p>Acquire land to build 10-15 houses by August 2005 for groundbreaking August 2006</p>	<p>Acquire land to build 15-20 houses by August 2006 for groundbreaking August 2007.</p>	<p>Acquire land to build 20-25 houses on by August 2007 for groundbreaking August 2008</p>
	<p>Explore land banking for long term building needs</p>	<p>Develop a complete land banking program and initiate initial elements</p>	<p>Expand land banking program to increase opportunities for housing</p>
	<p>Develop Land Acquisition Committee that pursues opportunities for land donations and purchases year round.</p>	<p>Formalize Land Acquisition process and create strategic land acquisition and development plan</p>	<p>Exhaust all avenues of land acquisition, relying on the resources of the Land Acquisition Committee</p>
	<p>Apply for any available lots through the Multnomah County lots program and lobby for program not to increase threshold criterion that would exclude Habitat.</p>	<p>Explore additional government partnerships that may result in land acquisition.</p>	
	<p>Explore partnerships opportunities with nonprofit and for profit developers</p>	<p>Explore becoming lead developer for large mixed income subdivision</p>	
	<p>Explore land acquisition and development funding options through FHLB and public and governmental programs</p>	<p>Apply for funding</p>	
		<p>Solidify one partnership with nonprofit/for profit developer</p>	

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

Strategy	FY 2006	FY 2007	FY 2008
<p>Construct new single-family and multi-family homes</p>	<p>Start 16 homes Compete 16 homes</p>	<p>Start 15-20 homes Compete 15-20 homes</p>	<p>Start 15-20 homes Compete 15-20 homes</p>
	<p>Hire and train construction site superintendent as third construction staff person.</p>	<p>Consider hiring full time Americorps team</p>	
	<p>Develop detailed House take-off list and budget</p>	<p>Evaluate and improve cost tracking system</p>	
	<p>Create and implement costs tracking and monitoring system</p>		
	<p>Develop construction schedule utilizing project management software</p>	<p>Maintain and adhere to weekly construction schedule</p>	<p>Maintain and adhere to weekly construction schedule</p>
	<p>Provide construction training to regular volunteers and homeowners</p>	<p>Evaluate construction training and develop and implement a construction training program</p>	<p>Continue program with increased participation</p>
	<p>Create and implement worksite safety plan</p>	<p>Identify volunteer needs on site at least six months in advance</p>	

**HFH partner families make successful transition to homeownership,
equipped to succeed financially and become contributing members
of their community**

Strategy	FY 2006	FY 2007	FY 2008
<i>Provide limited case-management to families participating in Habitat program</i>	Match every family with a family partner upon selection	Family partners stay connected with families for one year beyond move-in.	Recruit a least two Habitat homeowners to Family Partner committee
	Meet individually with all families who fall two months into arrears	Clarify delinquency policy and expectations	Develop foreclosure prevention programs
	Provide support and guidance to Condominium Association	Revise Condo Association documents and agreements based on evaluation	Existing condo associations require little support from PHFH beyond bookkeeping
	Evaluate success of Condo Assoc. at 44 th & Killingsworth		
<i>Connect partner families to social service resources that can help them succeed</i>	Create resource list and provide to families upon selection	Identify four organizations for potential partnerships to provide ongoing support to Habitat families.	Evaluate and maintain existing partnerships and develop one new partnership
		Create partnerships with two organizations	

**HFH partner families make successful transition to homeownership,
equipped to succeed financially and become contributing members
of their community**

Strategy	FY 2006	FY 2007	FY 2008
<p><i>Support equity development among Habitat homeowners while maintaining affordability to the family</i></p>	<p>Review and revise policy for setting house costs and mortgage lengths with affordability continuing to be a priority</p>	<p>Evaluate impact of new house cost policies</p>	<p>Annually assess financial impact on families</p>
	<p>Review current mortgage models and revise to better accomplish mission and goals.</p>	<p>Adopt new mortgage documents and policies that better reflect intent and mission of organization</p>	<p>Assess impact of new documents and policies</p>

**HFH partner families make successful transition to homeownership,
equipped to succeed financially and become contributing members
of their community**

Strategy	FY 2006	FY 2007	FY 2008
<p align="center"><i>Provide comprehensive education program that includes both pre- and post-purchase counseling</i></p>	<p>Conduct survey and interviews with current homeowners to evaluate Habitat program and impact</p>	<p>Develop system for annually evaluating program impact on families and families satisfaction level</p>	<p>Implement evaluation. 75% of homeowners are satisfied</p>
	<p>Develop comprehensive education program that includes extensive fiscal management training.</p>	<p>100% of selected families attend training program</p>	<p>100% of selected families attend training program</p>
	<p>Begin implementing program on families moving into Lambert condominiums</p>	<p>Evaluate and improve program</p>	<p>Evaluate and improve program</p>
	<p>Develop curriculum for post-purchase training for families</p>	<p>Recruit homeowners to participate in training program.</p>	<p>Recruit homeowners to participate in training program.</p>

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

Strategy	FY 2006	FY 2007	FY 2008
<i>Develop Portland Habitat for Humanity advocacy agenda</i>	Develop advocacy agenda for key policy discussions	Implement advocacy agenda	Assess advocacy role and success and revise as needed
<i>Increase Habitat's visibility as an advocate for decent, affordable housing.</i>	Incorporate educational advocacy into all PHFH publications and press releases		Portland Habitat board and staff advocate for affordable housing through speaking engagements and in the media
	Gain support from PHFH constituents (volunteers, donors) as advocates for our strategic plan	Provide opportunities for constituents to get involved with advocacy efforts through PHFH	Provide opportunities for constituents to get involved with advocacy efforts through PHFH
<i>Build strong presence within affordable housing community helping shape the environment in which Habitat works.</i>	Build effective relationships with elected or appointed officials	Involve elected officials as construction volunteers	Involve elected officials as construction volunteers
	Join and participate in Community Development Network as voting member	Participate in Community Development Network	Participate in Community Development Network

HFH has the right people in the right places to make it all happen

Strategy	FY 2006	FY 2007	FY 2008
<i>Recruit and develop program volunteers to support all aspects of the organization</i>	Develop formal Volunteer Program (Policies, procedures, job descriptions, etc)	Implement volunteer program throughout entire organization	Assess Volunteer Program annually
	Formalize committee structure and populate committees	All committees led by volunteer chair	Program implementation is provided primarily by committees with staff support
	Improve volunteer scheduling, tracking and reporting to meet needs	Implement web based volunteer scheduling	
<i>Recruit leaders to serve on the Board of Directors</i>	Implement board survey and self assessment, and strategically recruit 4 new members	Recruit to maintain full board	Recruit board members to reflect communities served by our programs.
	Implement Board Development Committee year-round recruiting	Implement term limits to maintain consistent annual turnover	
	Intentionally populate committees with potential future board members	Recruit some new board members from committees	Elect 60% or more of new board members from committees

HFH has the right people in the right places to make it all happen

Strategy	FY 2006	FY 2007	FY 2008
<p><i>Hire and support professional staff to lead program implementation</i></p>	<p>Create and implement professional development plan for all staff</p>	<p>Implement professional development plan for all staff</p>	<p>Implement professional development plan for all staff</p>
	<p>Provide staff with opportunities for career development</p>	<p>Provide new staff with formal job training and orientation</p>	

**HFH has adequate funding from a diversity of sources
to meet budget goals**

Strategy	FY 2006	FY 2007	FY 2008
Expand financial support from individuals	Establish and implement plan for cultivating major donors	Incorporate Planned Giving program into cultivation plan	
	Acquire 500 new donors each year	Acquire 500 new donors each year	Acquire 500 new donors each year
	Increase percentage of donors maintained from previous year	Increase percentage of donors maintained from previous year	Increase percentage of donors maintained from previous year
Enhance shared revenue programs that benefit Portland Habitat and other affiliates	Update ReStore work plan and financial goals.	Assess future growth expectations and identify appropriate space for store.	Buy or lease warehouse to accommodate expected rate of growth.
	Develop active ReStore advisory committee		
	Assess Vehicle Program performance and impact of new tax laws (1st Quarter)	Restructure program to accommodate growth expectations.	

**HFH has adequate funding from a diversity of sources
to meet budget goals**

Strategy	FY 2006	FY 2007	FY 2008
<i>Expand financial and in-kind support from local corporations</i>	Commitments from House Sponsors for Lambert totaling \$400,000	Commitments from House Sponsors totaling \$XXX	Commitments from House Sponsors totaling \$XXX
	Raise \$125,000 in undesignated funds through corporate giving campaign	Raise \$XXX in undesignated funds from corporations	Raise \$XXX in undesignated funds from corporations
	Increase participation in Team Habitat	Increase participation in Team Habitat	Increase participation in Team Habitat
	Inkind Donations committee increases total donations from 20%-30% of total construction costs	Inkind Donations committee increases total donations from 30%-40% of total construction costs	Inkind Donations committee increases total donations from 40%-50% of total construction costs
<i>Manage mortgage assets to leverage funding to support organizational and production capacity</i>	Develop long-term strategy for leveraging mortgage assets to increase production and capacity	Implement long-term mortgage assets strategy	Report on success of utilizing mortgage assets and revise plan based on lessons learned
	Leverage mortgages resulting in at least \$550,000 in revenue.	Leverage mortgages resulting in revenue necessary to achieve goals	Leverage mortgages resulting in revenue necessary to achieve goals

**HFH has adequate funding from a diversity of sources
to meet budget goals**

Strategy	FY 2006	FY 2007	FY 2008
<i>Increase support and revenue from the faith community</i>	Provide leadership to Building on Faith event in collaboration with metro-area affiliates	Increase number of churches participating in Building on Faith	Increase number of churches participating in Building on Faith
	Increase number of church partners and level of commitment for existing partners	Increase number of church partners and level of commitment for existing partners	Increase number of church partners and level of commitment for existing partners
<i>Seek foundation grant support for special projects and capacity building efforts</i>	Create and implement quarterly plan for completing grant applications	Create and implement quarterly plan for completing grant applications	Create and implement quarterly plan for completing grant applications
	Raise XXX from foundation grants	Raise XXX from foundation grants	Raise XXX from foundation grants
<i>Increase revenue from organizations</i>	Increase number of organization partners and level of commitment from existing partners	Increase number of organization partners and level of commitment from existing partners	Increase number of organization partners and level of commitment from existing partners

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

Strategy	FY 2006	FY 2007	FY 2008
<i>Create a clear and common message about the work of Habitat for Humanity in the Portland Metro area</i>	Develop marketing committee that creates Marketing Plan	Implement marketing efforts in collaboration with metro area affiliates	Implement marketing efforts in collaboration with metro area affiliates
<i>Promote Habitat through electronic and print materials, and via public media outlets</i>	Create brochure Print and distribute Annual Report in 2nd quarter	Print and distribute Annual Report in 2nd quarter	Print and distribute Annual Report in 2nd quarter
	Print and distribute newsletter on schedule	Update web site regularly	Update web site regularly
	Implement "new look" to web site		
<i>Hold special events to raise awareness</i>	Identify and begin planning for event commemorating PHFHs 25th anniversary	Implement 25th anniversary event	
		PHFH is partner for at least one major PDX event (Rose Festival, Oregon Bite, etc.)	

HFH has the systems and infrastructure to fully support the work of the organization

Strategy	FY 2006	FY 2007	FY 2008
<i>Document policies and procedures that guide operations</i>	Create policies and procedures manual	Review and update policies and procedures manual	Review and update policies and procedures manual
		Review personnel manual and update as necessary	
<i>Expand the data management capacity of the organization</i>	Upgrade to Raisers Edge 7 and provide appropriate staff with training	Provide ongoing training and development in technology	
	Purchase project management software and provide training to construction staff	Conduct a technology needs assessment to identify new technology needs	Implement findings from technology assessment