

Habitat for Humanity of Utah County Strategic Plan

Mission/Vision Statement:

Habitat for Humanity of Utah County, working in partnership with God and area residents, from all walks of life, strives to eliminate poverty housing and homelessness in Utah County by building and renovating houses with people in need so that there are decent neighborhoods in which every person can experience God's love and can live and grow into all that God intends.

Needs Statement:

Homeownership continues to be an unreachable dream for many hardworking families living in the valley. This is especially true for local families making less than 60 percent of the Area Median Income. These low-income families are often forced to live in costly and substandard housing due to soaring rents, high occupancy rates, and growing utility, food, medical, and transportation costs.

Overview – Strategic Plan

Habitat for Humanity of Utah County's Board of Directors and Executive Director and staff have come together in consensus to increase our affiliate's efforts to meet the need of affordable housing in our service area. The following plan provides direction for the affiliate to achieve our goal of becoming a Block Builder (building or renovating at a sustainable level of five homes per year) by June 30, 2012. This document is a summary of our vision and our strategy for accomplishing our building goals.

Organizational Profile and History

Habitat for Humanity of Utah County is a non-profit, ecumenical organization and is one of more than 2,300 affiliates of Habitat for Humanity International. The local affiliate is committed to eliminating poverty housing and homelessness in the county by building or renovating simple, decent homes with area residents in need of affordable shelter. Affiliated in 1991 by a group of local community members that were concerned about substandard housing in the county, the organization has built or renovated 36 homes providing more than 57 adults and 120 children safe and affordable housing and a stable home environment. In the last four years, the affiliate has gone from building one home per year to building or renovating five homes and has doubled the amount of Habitat homes that have been built in the community. The affiliate can now build one home per year using mortgage payments alone.

In addition to its affordable housing program, the local affiliate also provides a free tool library and a basic home maintenance course for Habitat families and other interested community members. The organization also runs a ReStore Home Improvement Outlet where new and used building materials, appliances, and furniture are sold with profits

going to the affiliate operating and construction. Since its inception in 2007, the ReStore has not only raised thousands of dollars for the affiliate but has also kept over 400,000 pounds of waste out of the local landfill.

The Utah County affiliate also promotes aluminum, paper, and vehicle recycling through its ReStore Recycle programs and offers a life planning program for area families living in poverty called "Getting Ahead in a Just Getting'-By World." To date, 33 community families have successfully graduated from the program.

Our goal is to increase the number of houses built or renovated over time so that the affiliate is building or renovating at a sustained rate of five homes by June 30, 2012. Our schedule for achieving this rate is shown below:

2009-2010	5
2010-2011	6
2011-2102	6

Logistical Implications

The logistical implications of the Board’s vision and desire to build houses at the sustained level of five per year are estimated and shown below. This information is based on the expert judgment of staff and board and was developed by the Executive Director and the Board Vice President with input from the board and was ratified by the board on August 26, 2009. With any uncertainty associated with the numbers listed below, it is clear that all aspects of the organization are affected from the numbers of volunteers, to resource development, committee operations, staffing levels, administrative procedures, and Board functions. The number of long term affiliate volunteers must increase from existing levels. Total income generated must increase to an annual \$1,650,000 dollars by June 30, 2010 with an additional \$200,000 added to the current budget each year beginning fiscal year 2010-2011.

Resources – Requirements and Sources

The Board, with input from staff, estimates that to achieve its goals will require an annual income of over \$1,650,000 dollars annually by 2010. The major cost elements comprising this estimate are:

- 5 homes x \$185,000 (materials, labor, land, building permits, etc) \$925,000
- Other program expenses \$45,000
- Operating expenses including salaries, benefits, and ReStore operations \$650,000
- Tithe on 10% of unrestricted \$30,000

Total: \$1,650,000

This is the first order to estimate and does not accommodate many miscellaneous, but expected increase costs, e.g., increased tool inventory.

The Board's expectation is that required resources will come from the following sources as indicated:

21%	Government
20%	ReStore
16%	Individuals
15%	Corporations/Businesses
13%	Foundations/Grants
6%	Mortgage Payments
4%	Other Sources
2%	Events/Misc. Activities
2%	Gifts in Kind
1%	Churches

Strategic Elements of the Plan

House Production Goal: Beginning July 2007, 17 homes will be built or renovated completed by June 2012. Sustain building or renovating at five homes per year beginning fiscal year 2010-2011.

The effort to recreate our organization to achieve our goals can be organized into four broad focus areas:

- Leadership and Management
- Resource Development & ReStore Expansion
- Policies, Procedures & Systems
- Family Development

Implementation of the plan will involve the creation of an operational plan under the direction of the Board. The operational plan will establish yearly goals and quarterly tasks to be accomplished to help in achieving our affiliate's mission to serve more families in our community. The board will review the tasks and goals quarterly and make adjustments as necessary.

Plan Monitors:

Staff: Executive Director

Board: Board Vice President

Organizational Functions

Habitat for Humanity of Utah County has a 16 member Board of Directors and nine committees (see descriptions below) to help the affiliate accomplish its affordable housing mission.

Finance

The finance committee oversees bookkeeping, accounting, taxes, annual external audit preparation, insurance, investments, and monitors cash flow for the affiliate.

Audit

The audit committee oversees the annual external audit preparation and review, as well as policies and procedures for internal auditing.

Development Services

The development services committee plans, organizes, and implements fundraisers. Depending on the season and its upcoming fundraisers, the committee may be split into small groups to plan low-profile fundraisers, or may all be working on one major fundraiser. The committee works on target marketing, corporate relations, grant writing, and general public relations. As part of development services, the visual marketing subcommittee maintains the web site, photographs Habitat events, and creates needed brochures and signs for the affiliate.

Family Partnership

Each member of the family partnership committee is committed to helping Utah County Habitat families become self-sufficient homeowners. Members act as family mentors to see future homeowners through the building and financial planning process, while others serve to help those who already own their homes. They plan semi-annual family parties and encourage a continuing partnership with Habitat for Humanity. Other members ensure families are paying mortgages and ensure that families are maintaining their homes and positively representing Habitat for Humanity.

Building

The building committee oversees the construction process. This includes approving inventory purchases, selecting sub-contractors, and helping to supervise unskilled volunteers as needed. The building committee creates a building schedule, approves specification changes, and decides special requests. The group is committed to choosing options and home plans that conform to Habitat's "simple and decent" philosophy. Responsible for hosting monthly home maintenance course for homeowners.

Volunteer and Human Resources

The volunteer and human resources committee oversees all matters related to volunteers. Its members recruit, recognize, reward, and help to retain the many volunteers who serve the organization. Responsible for hosting the annual volunteer & donor recognition dinner, recruiting volunteers for various tasks, creating and implementing programs to show appreciation to short-term volunteers, and maintaining the volunteer database. Responsible for community outreach whenever the organization participates in community booths.

ReStore

The ReStore committee is in charge of steering and growing the ReStore. Members are in charge of leading "deconstruction" volunteer crews, supplying environmental research on the benefits of the store, providing retail, marketing, and property management expertise, and organizing the ReStore Recycle program.

Family Selection

The family selection committee screens applicants, and evaluates and recommends to the Board of Directors potential families for Habitat's homeownership program.

Site Selection

The site selection committee identifies and recommends acquisition of properties in Utah County on which to build or renovate homes. This committee is in charge of getting all approvals, understanding and abiding by all zoning requirements, obtaining necessary permits, and dealing with any legal issues related to building Habitat homes or subdivisions.

Action Plan
July 2009 – June 2012

FOCUS AREA 1: LEADERSHIP AND MANAGEMENT

GOALS FY 2012 – Board of Directors will continue to transition from a working board to a governing board to a governing board changing their thinking from operational discussions and decisions to more strategic ones.

1st Quarter – Individual BOD member giving is increased to 60 percent. Annual meeting held with election of new Executive Committee. Nominating committee recruits and nominates new BOD members to replace BOD members who terms have expired. BOD elects new members. New member orientation held.

2nd Quarter – Monthly BOD training implemented during monthly board meetings. Board agenda reflects less operational discussions and more strategic decisions.

3rd Quarter – Annual Board Retreat held. Fundraising training is provided to BOD. Committee members and others are recruited as committee chairpersons. Committee chair orientation is held.

4th Quarter - Board members no longer chair committees. BOD reviews strategic plan and monitors committee and staff adherence to strategic plan. BOD reviews and approves budget for next fiscal year.

GOAL FY 2011 – Board members will be increasingly involved with fundraising. Board giving will be at 100 percent. Board member recruitment will be targeted to lead to sustainability.

1st Quarter – BOD members provide nominating committee names of potential board members that can be major donors or have connections to major donors. Annual meeting is held with election of new Executive Committee. Nominating committee recruits and nominates additional members for the BOD replacing board members who terms have expired.

2nd Quarter – BOD provides business and individual contacts for major donor campaign and the "Home Team" program. Board approves Resource Development Plan.

3rd Quarter – Annual Retreat is held. BOD members assist with major donor campaign and business relationship building.

4th Quarter - 100 percent of BOD members providing individual affiliate contribution. BOD continues to assist with major donor campaign and business relationship building.

GOAL FY 2012 – The Board of Directors’ priorities are focused on strategic planning, fiscal accountability and resource development.

1st Quarter – Annual meeting is held with election of new Executive Committee. Nominating committee recruits and nominates new BOD members to replace board members that terms have expired. The Board now reflects the diverse community and includes some well known entities.

2nd Quarter – BOD is actively involved in fundraising by providing possible BOD and committee member nominations and participating in major donor campaign, events, public relations, marketing, and business relationship building.

3rd Quarter – Annual Board Retreat held. BOD reviews three year strategic plan and sets affiliate construction goals, budget, and priorities for next three years.

4th Quarter - BOD members increase individual affiliate donations by 10 percent. BOD Vice President, Executive Director, and Finance Committee create new strategic plan and annual budget for BOD approval. Board agenda reflects only policy and strategic decisions. Staff and committees are empowered to make nearly all operational decisions in accordance to the board's objectives, strategic plan, and the affiliate's annual budget.

FOCUS AREA 2: RESOURCE DEVELOPMENT & RESTORE EXPANSION

GOALS FY 2010 – Formalize ReStore operations, develop and enhance community partnerships, implement marketing strategies, and work to increase ReStore profits by 40 percent yearly over the next 3 years.

1st Quarter - Move affiliate operations and ReStore to newly renovated 21,500 square foot building. Hold open house and move in sale. Recruit new home sponsor. Hire two AmeriCorps*VISTA members to assist with Resource Development and Church Relations.

2nd Quarter - Update ReStore business plan and policies and procedures. Develop ReStore marketing plan targeting donors and customers. Cultivate current ReStore community partners. Hold annual gift wrap fundraiser at Provo Towne Centre. Recruit one new church partner. Recruit one new home sponsor. Research businesses and corporations.

3rd Quarter - Implement ReStore marketing strategies. Target corporations and businesses for ReStore donor outreach. Hold annual blue grass concert. Continue to promote ReStore Recycle programs. Improve "Home Team" program.

4th Quarter - Celebrate ReStore's Third Birthday. Hold anniversary sale. Look at additional inventory options for ReStore. Hold annual Bike to Build annual motorcycle ride. Meet with businesses and corporations to encourage sponsorships and membership in "Home Team". Apply for Capacity Building Funding.

GOAL FY 2011 – Hire a ReStore Director. Reduce dependency on single individual donor by implementing major donor campaign, increasing ReStore profits, targeting businesses and corporations for house sponsorships, reaching out to area churches, securing additional foundation, government, and HFHI funding, and expanding other fundraising programs.

1st Quarter - Advertise and interview for new ReStore Director. Hire ReStore Director. Hold orientation. Develop formal Resource Development Plan. Continue to improve and expand ReStore. Strengthen mailing list and increase mailing solicitations to three times per year. Research additional businesses and corporations. Apply for FHLB AHP Funding for Depot Townhouse project. Secure sponsorships for Homebuilders Blitz 2010 home. Research major donors. Hire two AmeriCorps*VISTA members to assist with Resource Development and Church Relations.

2nd Quarter - Recruit one new church partner. Hold annual gift wrap fundraiser at Provo Towne Centre. Apply for CDBG, HOME and CHDO funding for new construction, renovation home, and land acquisition. Meet with businesses and corporations to encourage house sponsorships and/or membership in the "Home Team". Recruit two to three house sponsors. Implement major donor campaign.

3rd Quarter - Hold annual bluegrass concert and phone book recycling campaign. Look at possible loan pool with local banks. BOD assists with major donor campaign and business relationship building.

4th Quarter - Promote Cars for Homes with graduating seniors at UVU and BYU. Hold annual Bike to Build motorcycle ride. Celebrate ReStore's Fourth Birthday.

GOAL FY 2012 – Proceed with major donor campaign. Increase ReStore profit to cover all administrative and fundraising expenses for the affiliate. Continue to work with businesses to secure house sponsorships. Continue to recruit church partners. Increase grant application submittals. Expand Cans, Cars, and Paper programs.

1st Quarter – Continue to improve and expand ReStore. Proceed with major donor campaign. Continue to send mailing solicitations three times per year. Research additional grant opportunities. Proceed with the business sponsorship campaign with the goal of recruiting three house sponsors. Hire two AmeriCorps*VISTA members to assist with Resource Development and Church Relations.

2nd Quarter – Recruit one new church partner. Hold annual gift wrap fundraiser at Provo Towne Centre. Apply for CDBG, HOME and CHDO funding for the Depot townhouse project. Submit three grant applications per week.

3rd Quarter – Hold annual bluegrass concert. Look at ways to expand ReStore Environment and other affiliate fundraising programs. Research and consider Accelerated Asset Recovery Program.

4th Quarter - Review and update Resource Development Plan. Hold annual Bike to Build motorcycle ride. Celebrate ReStore's Fifth Birthday.

FOCUS AREA 3: POLICIES, PROCEDURES & SYSTEMS

GOALS FY 2010 – Affiliate systems, policies and procedures will be reviewed by staff, committees, and Board of Directors. Missing policies or additional policies considered necessary will be created.

1st Quarter – Staff reviews policies, systems, procedures and makes recommendations to Board and committees.

2nd Quarter – Board and committees review staff recommendations.

3rd Quarter – Board, staff and committees create missing and/or additional policies for board approval. Site acquisition and development procedures are written and formalized. A tracking system for in-kind donations is developed.

4th Quarter - Board approves new systems, policies, and procedures.

GOAL FY 2011 – Affiliate systems, policies and procedures will be refined, updated, approved and implemented.

1st Quarter – Staff and Committees refine and update existing policies and procedures. Donor tracking and protocol is upgraded and formalized.

2nd Quarter – Staff and committees review updates and make necessary changes.

3rd Quarter – Board reviews and approves updates.

4th Quarter - Affiliate policies and procedures manual is updated. Training is held on new and updated policies and procedures, and systems for BOD, staff, and committee chairpersons.

GOAL FY 2012 – Affiliate operations will be systems, process, and policies and procedures driven.

1st Quarter – New and updated policies, procedures, and systems are implemented. Staff member assigned to keep manual updated.

2nd Quarter – Staff member will be assigned by BOD to monitor affiliate's adherence to policies, procedures, and systems. Staff member will be assigned by BOD to review policies, procedures, and systems yearly and make recommendations to the BOD. Policies, procedures and systems will also be reviewed to assure that the affiliate is in compliance with HFHI's Standard of Excellence.

3rd Quarter – BOD will review recommendations at the Annual Board Retreat. Recommendations will be considered as the BOD works to set goals and priorities for the affiliate for the next three years.

4th Quarter - Any new policies, procedures or systems will be created, updated, and implemented and will be shared with staff, committees, and BOD. Manual will be updated.

FOCUS AREA 4: FAMILY DEVELOPMENT

GOALS FY 2012 – 60% of Habitat partner families are showing pride in ownership by maintaining their homes and properties to a community standard. Homeowner participation with the affiliate will increase. A sufficient number of homeowners will change current behaviors and attitudes.

1st Quarter – Mandatory maintenance meeting will be held for all Habitat homeowners and partner families. Maintenance policies and procedures will be created by Family Partnership Committee. Bi-annual family party will be held. Current homeowners will be encouraged to attend home maintenance course and Getting Ahead program. New families will be required to attend and graduate from the home maintenance course and Getting Ahead program. Quarterly Pride in Ownership Award will be given. Maintenance tips will be included in monthly newsletter. Homeowners and partner families will receive USU Extension newsletter monthly. Hold Habitat Bike Tour. Homeowner-sponsored home will be selected.

2nd Quarter – Maintenance policies and procedures will be approved by the Board. Quarterly Pride in Ownership Award will be given. Survey sent to homeowner about classes they would like the affiliate to offer. Past Getting Ahead participants will be sent self assessment survey. Homeowner build day held.

3rd Quarter – Maintenance policies and procedures will be implemented and enforced by the Family Partnership Committee. Bi-annual family party held. Outstanding

partner family awarded “Family Partner of the Year” award at Volunteer Recognition Dinner. Quarterly Pride in Ownership Award will be given. Review surveys and develop classes. Homeowner build day held.

4th Quarter - Quarterly Pride in Ownership Award will be given. Yearly Pride in Ownership Award Given. Implement monthly classes. Provide volunteers, tools and dumpsters for spring/summer clean-up. Homeowner build day held.

GOAL FY 2011 – 75% of Habitat partner families are showing pride in ownership by maintaining their homes and properties to a community standard. Homeowners will be actively participating with the affiliate. A sufficient number of homeowners will be able to overcome barriers to life progression.

1st Quarter – Current homeowners will be encouraged to attend home maintenance course and Getting Ahead program. New families will be required to attend and graduate from the home maintenance course and Getting Ahead program. Quarterly Pride in Ownership Award will be given. Bi-annual family party will be held. Hold Habitat Bike Tour. Homeowner-sponsored home will be selected.

2nd Quarter – Quarterly Pride in Ownership Award will be given. Expand tool lending library. Have current homeowner teach monthly classes. Past Getting Ahead participants will be sent self assessment survey. Homeowner build day held.

3rd Quarter – Bi-annual family party held. Outstanding partner family awarded “Family Partner of the Year” award at Volunteer Recognition Dinner. Quarterly Pride in Ownership Award will be given. Homeowner build day held.

4th Quarter - Quarterly Pride in Ownership Award will be given. Yearly Pride in Ownership Award Given. Provide volunteers, tools and dumpsters for spring/summer clean-up. Homeowner build day held.

GOAL FY 2012 – 90% of Habitat partner families are showing pride in ownership by maintaining their homes and properties to a community standard. Homeowners will be donating too and actively engaged with the affiliate helping it further its mission in the community. A sufficient number of homeowners will be able to break the poverty cycle and build bridges to a more stable and productive life.

1st Quarter – Current homeowners will be encouraged to attend home maintenance course and Getting Ahead program. New families will be required to attend and graduate from the home maintenance course and Getting Ahead program. Quarterly Pride in Ownership Award will be given. Bi-annual family party held. Hold Habitat Bike Tour. Homeowner-sponsored home will be selected.

2nd Quarter – Quarterly Pride in Ownership Award will be given. Expand tool lending library. Investigate homeowner’s associations. Past Getting Ahead participants will be sent self assessment survey. Homeowner build day held.

3rd Quarter – Bi-annual family party held. Outstanding partner family awarded “Family Partner of the Year” award at Volunteer Recognition Dinner. Quarterly Pride in Ownership Award will be given. Homeowner build day held.

4th Quarter - Quarterly Pride in Ownership Award will be given. Yearly Pride in Ownership Award given. Provide volunteers, tools and dumpsters for spring/summer clean-up. Homeowner build day held.