

THE CANOE GROUP

Willamette West Habitat for Humanity

2011-2013 Strategic Plan

Helping People Build Homes and Neighborhoods

Prepared by
Marta Mellinger

The Canoe Group Inc.
4300 SW Parkview Ave.
Portland, OR 97225
www.TheCanoeGroup.com

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Inside Cover: Adapting and Measuring Results

This 2011-2013 Willamette West Habitat for Humanity strategic plan was developed through discussions, considerations, community engagement, research and analysis leading to decisions made by Willamette West Habitat Board and staff. Background data and research is included in Plan appendices. This plan will guide the work of the organization for the next three to four years.

Each quarter, staff and Executive Committee leaders will review progress on key measures of success. During these quarterly review sessions, action plans and calendars will be revised as needed. New assumptions and recommended adjustments will be presented to and discussed with the Board.

As the staff begins each year's annual planning and budgeting, the Plan's results will be reviewed and reconsidered. It will function as a "rolling Plan", and will be revised until the staff and Board determine a new Plan is necessary. During this annual review, the strategic plan's objectives and strategies will be adapted to changing conditions and reflect the past year's progress.

2010 Board of Directors

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Dan Fako
Kirsten Goetz
George Griffith
Lynn Hatifled
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Ex Officio Lindsay Bradstreet
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Former Board Members & Professional Advisors

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Melanie St. John
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2010 Staff

Executive Director Mark Forker
Construction Manager Mike Wille
Development & Communications Manager Hope Howard
Homeowner Services Manager Anna Wendt
Accountant/Independent Contractor Marilyn Palma
Volunteer Services/AmeriCorps Kate Schnurr

Strategic planning guided by **The Canoe Group, Inc.**
David Frackelton, Michael Kosmala & Marta Mellinger

Letter from Executive Director Mark Forker & Board President Dan Fako

Habitat for Humanity is an ecumenical Christian housing ministry. We seek to eliminate poverty housing and homelessness from the world and to make decent shelter a matter of conscience and action. To accomplish these goals, we invite people of all backgrounds, races and religions to build houses together in partnership with families in need.

Habitat for Humanity was founded in 1976 by Millard Fuller, along with his wife, Linda. Today, Habitat for Humanity has built over 350,000 houses around the world, providing more than 1.75 million people in 3,000 communities with safe, decent, affordable shelter.

Willamette West Habitat for Humanity was founded in 1988 by a group of retired clergy who wanted to carry out Habitat's ministry on Portland's Westside. It is an independently run, nonprofit organization that is guided by a local volunteer board. It coordinates all aspects of Habitat home building in its local area — fundraising; building site selection; partner family selection and support; house construction; and mortgage servicing.

As a Habitat affiliate, Willamette West Habitat acts in partnership with and on behalf of Habitat for Humanity International. To date, it has built 60 homes for hardworking, low income families in Washington County.

Habitat for Humanity embraces six Mission Principles:

1. Demonstrate the love and teachings of Jesus Christ.
2. Advocate on behalf of those in need of decent shelter.
3. Focus on shelter by building and renovating simple, decent, affordable houses.
4. Engage broad community through inclusive leadership and diverse partnerships.
5. Promote dignity through full partnership with Habitat homeowners and future home partners.
6. Promote transformational and sustainable community development.

These Principles serve to guide Willamette West Habitat as it charts a 3-year course to expand its capacity to provide homeownership opportunities to a greater number of struggling families.

As with a for-profit business, the board of directors understands that it must expand revenue while managing costs. To that end, Willamette West Habitat intends to employ sustainable fundraising strategies to generate revenue, while controlling

costs through prudent management and fully utilizing volunteers and in-kind donations.

In this document, the board of directors envisions an organization that by 2013:

- Owns our office / warehouse facility in Hillsboro, Oregon.
- Is known and honored as the primary source for affordable homeownership in Washington County.
- Consistently trains and places 12 families each year into our homes.

The plan is sound and the framework is set. We invite people from all walks of life to join us.

Mark Forker
Executive Director

Dan Fako
Board President

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Introduction to the Willamette West Habitat for Humanity Strategic Plan

This strategic plan of Willamette West Habitat for Humanity (WW Habitat) centers in a ***strategic framework***:

- mission
- organizational values
- three strategic goals, each defined with a measurable strategic objective
- change initiatives for each objective

The framework was drafted by the WW Habitat Board and staff and will be approved by the WW Habitat Board of Directors at their December, 2010 Board meeting. Staff was integrally involved as equal partners in drafting the Plan.

WW Habitat has set three ambitious and interlocking strategic goals. By January 2013, WW Habitat will expand the number of families served each year, increase visibility and enlarge the number of volunteers who are involved in community service and will strengthen neighborhood and community engagement in the areas served.

The organization intends to accomplish a modest, first-time capital campaign to raise \$675,000 to purchase its offices and warehouse. In so doing, WW Habitat will decrease annual operating expenses, directing more resources into its mission.

In addition, WW Habitat intends to increase earned income from the launch and expansion of a Westside ReStore. This new store opens in the first quarter of January 2011.

After additional planning discussions and stakeholder research the goals were articulated in ***strategic objectives***. The Plan outlines each objective with strategies that are specific, measurable, ambitious, realistic and timely.

A new ***value proposition*** more clearly defines WW Habitat's promise to stakeholders and to the community. The organization intends to continue its steady and conservative trajectory of growth. In the next three years, WW Habitat plans to build and operate a stronger and more fully integrated network of volunteer committees. WW Habitat's growing cadre of volunteers and supporters can provide unique and individual skills as they become invested in the Habitat mission. In the past, volunteer opportunities have been somewhat limited to Board service, or building service. *This organizational growth continues the work that has already been undertaken under the leadership of the strong and involved Board, full-time Executive Director Mark Forker and the small, effective staff group.*

The plan is built on a "Stair Step" model, where specific volunteer committees are formed, trained and strengthened, expanding the reach and capacity of WW Habitat to serve. New staff would be added as resources become available, primarily to

manage increased numbers of volunteers. Initially, AmeriCorps and/or VISTA will supplement staffing.

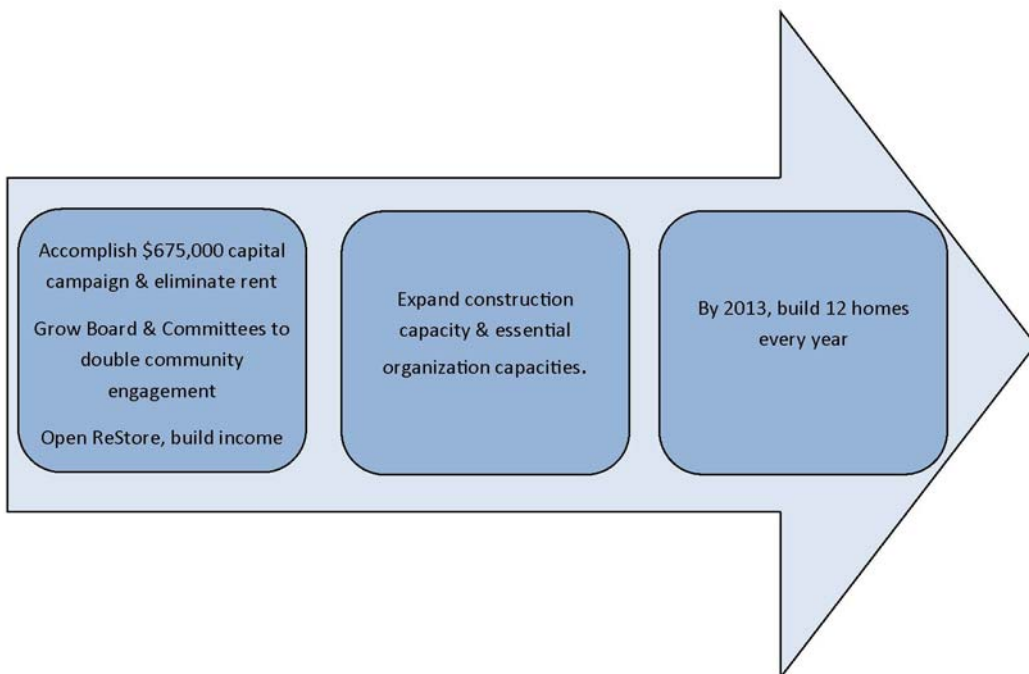
Implementing the new strategic plan will require only a modest expansion of new resources. Both the decrease in rent and the increase in ReStore earned income are building blocks of the new business model. The capital campaign is being planned to build more effective and professional development operations, managed by staff, and involving Board, volunteers and other key stakeholders.

This strategic plan will strengthen the organization, help assure a sustainable future and broaden WW Habitat's service to the public. The strategic goals and objectives are outlined in a) **action plans** with b) **measures of success** that will be tracked by staff and Board to assess progress and allows for continuous adaptation.

Summary of WW Habitat Strategic Planning

In January and February 2010, the WW Habitat Board and staff began strategic planning for the future. With a preliminary assessment of WW Habitat's current situation, the organization clarified three strategic goals for 2010-2012. Work began in ad hoc committees, with the focused intention to accomplish a strategic planning process before the 4th quarter of 2010.

The Canoe Group, a Portland-based consulting firm, was contracted to guide strategic planning. A selected planning team of Board, staff and community members outlined the process for stakeholder research, undertaken in July and August. In September, the research was synthesized and planning discussions were held to map plans and strategies for the next three years. The primary strategic objectives are charted below:



Mission Statement

Willamette West Habitat for Humanity will foster home ownership and improve our communities.

Purpose

To build simple, decent, affordable housing with a neighborhood emphasis for families in need who want to own their own home.

Organizational Values

- We live our Christian values and our mission.
- We feel an obligation to make the best use of the resources we are stewarding.
- We intend to positively impact families.
- We plan to impact our community, and the world.

2010-2013 Strategic Goals, Strategic Objectives and Change Initiatives

GOAL ONE: By 2013, own our own offices and warehouse.

2010-2013 Strategic Objective: Lead and accomplish a \$675,000 capital campaign by January 1, 2012.

1. Identify and provide the specific and ongoing support necessary to guide a successful campaign.
 - Assign capital campaign leadership and responsibility.
 - Clarify and assign roles.
2. Expand the base of support for Willamette West Habitat’s work and approach, setting targets for major donors, grassroots support, foundations, churches, government and business/corporations.
3. Build for the longer term throughout the capital campaign, continuously improving our annual fundraising operating system (grassroots support, major donor cultivation and planned giving) to make best use of Board and staff skills and capabilities.
4. Develop and execute a successful public/grassroots campaign that increases the number of donors, and asks for combined/increased annual gift and capital campaign contributions.

GOAL TWO: Be known and honored as the primary source for affordable home ownership in Washington County.

2010-2013 Strategic Objective: Double the number of people who are engaged with the issues of affordable housing through their involvement with WW Habitat.

1. Live by the value we provide to our stakeholders: Improve and expand the structures so individuals who approach Habitat can connect with work that is meaningful to them.
 - Develop, pilot, track, measure results and continuously improve regular, WW Habitat Orientation to teach how we work, what impact we have, and the variety of ways people can help/be involved.
 - Develop, measure and “formalize” year-round outreach to recruit newcomers who attend WW Habitat Orientations and who subsequently volunteer. (i.e. theme builds, evening builds, pilot projects, expanded number of volunteer committees)
 - Assure highest quality volunteer management and recognition to retain and build lasting relationships with a high percentage of volunteers.
2. Well-planned communications.
 - Staff, Board and stakeholders all know our well-defined key messages.
 - We track our families long-term to generate meaningful stories about our impact.
 - We communicate to stakeholders and the public through many different channels.
3. Develop and resource sustainable partnerships with organizations that want to “help build Habitat homes”. (Include churches, governments, real estate developers, corporations, school districts, and social service agencies).
4. Commit resources to learning and growth.
 - Leadership training for Board.
 - Professional development for staff.
 - Invest in attending national Habitat events.
 - Educate the individual as part of organizational practice.
 - Volunteer training/communication.
5. Set targets, research, identify and buy/bank land with and through our partners.

GOAL THREE: Consistently train and place 12 families each year in our homes.

2010-2013 Strategic Objective: Permanently and thoughtfully expand our construction capacity and critical organization capacities.

1. Provide more financial resources (through in-kind, cash and pledged contributions, grants and earned income/ReStore) to support our expanded mission.
 - Increase the Board’s personal touch/involvement in annual fundraising and donor cultivation.
 - Accelerate the income earned by the new Westside ReStore.

- Decrease annual expenses by eliminating our rent.
- 2. Expand our knowledge and skills and develop plans so we can build higher density neighborhoods (i.e. row houses, attached housing.)
- 3. Increase the number of sites, the number of days, the number of supervisors, our tool bank and the number of volunteers we successfully employ on construction sites.
- 4. Use the Stair-Step approach to build human resources and organizational capacity:
 - Strategically analyze non-construction, operational capacities that WW Habitat must grow. Decide what must be staff work and what of Habitat's work can be volunteer-driven.
 - New "job descriptions" for all committee work
 - Improve committee management and volunteer involvement opportunities first, add staff support at pre-determined junctures.
- 5. Expand our Selection Committee(s) to reach out to find more family applicants to feed into our selection process.
- 6. Develop a system of services and trainings that provide homeowner support, education and neighborhood development.
- 7. Measure mission success and impact to stay focused on achieving results.



Implementing the Willamette West Habitat for Humanity Strategic Plan

Measures of Success:

What will Willamette West Habitat use to measure progress?

1. “Our” homes will be well maintained by the families that own them.
2. “Our” neighborhoods will be supported by well-functioning HOAs.
3. We will place 12 families in homes each year.
4. The families we place will all meet selection criteria that help keep us focused on the mission we serve.
5. Families will sell their homes back to us.
6. We will know and handle delinquencies with respect and clarity.
7. We will involve more volunteers and more donors in helping to serve our mission.
8. We will maintain a strong balance sheet, and generate appropriate revenue to meet our annual expenses.

Understanding and Employing WW Habitat’s Value Proposition

The Board and staff has developed the following matrices which focus and clarify research-based assumptions about Willamette West Habitat’s key stakeholder groups: volunteers and donors.

The attributes of a Willamette West Habitat for Humanity stakeholder include:

- Socially conscious
- Has a social network
- Engages with others frequently and in a variety of locations
- Has time (volunteers) and/or resources (donors)
- Makes and follows-through on commitments to help others
- Wants to help make the world a “better place”
- Believes that “it works”

What do volunteers want from WW Habitat?	What do we promise?	What will they say when we are successful?
<p>A positive experience (which is different for different people!)</p> <ul style="list-style-type: none"> ▪ Do something ▪ Learn something ▪ See results today ▪ Be challenged 	<p>OPPORTUNITY Well-organized tasks, instruction, support, supervision and materials.</p> <p>Orientation and training</p> <p>Leadership that empowers successful involvement.</p>	<p>“I want to come back. I had a great time: They are doing it right.”</p>
<p>To make a difference in the world</p>	<p>COMMUNICATION Orientation: information about “how it all works”</p> <p>Follow-up that conveys the long-term results: Letters, emails, events, website, celebrations, newsletter, press and media tell the WW Habitat stories.</p>	<p>“I helped people in my community and can tell others how to help too”</p>
<p>To be appreciated</p> <ul style="list-style-type: none"> ▪ Connect emotionally ▪ Appropriate “thank yous” ▪ Feel honored and noticed 	<p>GRATITUDE Individual recognition just for “showing up”: in the moment and afterwards</p> <p>Public recognition for my service: Events, milestones of service are honored</p> <p>Thank you communications: surveys and further invitations</p>	<p>“They saw me! They knew I was there! I’m not being taken for granted!”</p>

What do donors want from WW Habitat?	What do we promise?	What will they say when we are successful?
To see results from my investment	<p>STORIES (& FACTS) Stories about the impact on individuals and families</p> <p>Impact is measured in numbers, too</p>	“We made a difference”
Money/resources are well-spent	<p>TIGHT-FISTEDNESS Share the context of how and why we spend money and resources (in the annual report and newsletter)</p>	“Willamette West Habitat are good stewards”
The process and paperwork of giving is easy	<p>SIMPLICITY Automatic withdrawal, simple paperwork, great processes and follow-through</p>	“No hassles”
To be appreciated in appropriate ways	<p>RECOGNITION Phone calls, name on stuff, listed in newsletter and annual report; thank you letters. To be known and noticed at Habitat events.</p>	“They know me. I know them.”
Leverage for my gift	<p>INFORMATION Tell me when and how to make my gift as powerful as possible; employee matches, challenge opportunities, targeted campaigns.</p>	“They know what they are doing.”

2010-2013 Willamette West Habitat for Humanity Action Plan Benchmarks

With this new strategic plan, Willamette West Habitat for Humanity intends to review progress every three months, comparing accomplishments of the past quarter against the activities and benchmarks outlined below.

Quarterly reviews, led by the Executive Director and the Board President, will be accomplished by the WW Habitat Executive Committee during quarterly Strategic Review coffee-meetings held in January, April, July and November each year.

The full Board and Staff will explore organizational progress at an annual retreat, held in January or February.

During the annual retreat, new strategic objectives and/or strategies will be developed, which will inform the planning and budgeting for the coming fiscal year. After each annual retreat, the WW Habitat Strategic Plan will be revised and the new language will be approved as part of the annual planning and budgeting.

Note: The chart below is structured to outline activities and benchmarks related to each of the three strategic objectives. **Key benchmarks** are indicated with boldfaced type.

	Capital Campaign & Fundraising	Public Visibility	Organizational Capacity
2010 4 th	Holiday/end-of-year ask First grant submitted; case for support final 100% Board participation Corporate & major donor targets refined Presentation materials formatted 12/10 Six grants submitted	Convene Community Outreach & Volunteer Management Committees Plans complete for new recruitment & orientation strategies (pilot in 2011) Draft & approve new committee descriptions & volunteer expectations	Three Year Financial Projections; Budget approval 12/10 Strategic Plan OK: Mark & Dan assign implementation responsibilities Executive Committee sets plans for Strategic Plan tracking & measures Fine-tune HR Stair Step re site supervision Recruit new volunteer site supervisors for 3x/week; lay plans to expand sites in 2011 Develop data base systems & methods
2011 1st	Plan the public campaign	Pilot new Orientation Session 1/11	ReStore opening

	<p>Presentations (corporate) scheduled/made</p> <p>Grants submitted</p> <p>Outline interconnected fundraising strategies between capital campaign & annual campaigns for 2011 & 2012</p>	<p>Refine and implement new Orientation sessions monthly throughout 2011</p> <p>Refine and implement recruitment & outreach work (Community Outreach Committee) throughout 2011</p>	<p>Leadership training plan for staff & Board members</p> <p>Habitat National Convention</p> <p>AmeriCorps proposals: determine options</p> <p>Plan for expanding volunteer communications & recognition (all along the volunteer pathway)</p>
2011 2 nd	<p>5/11 Annual Breakfast</p> <p>Early grant results</p> <p>Reassess asks and involvement of faith community</p> <p>Integrate volunteer to donor pathway communications/strategies</p>	<p>Continue Orientations and recruitment strategies ongoing</p> <p>Post breakfast presentations to key government leaders</p>	<p>Assess volunteer site supervisor for long-term viability</p> <p>Pilot leadership training for new committee chairs, Board, staff</p> <p>Renew AmeriCorps Volunteer Manager & other positions</p>
2011 3 rd	<p>8/11-9/11 Major donor asks</p> <p>9/11 All grants submitted</p> <p>9/11 Public & grassroots direct mail (asking \$10-\$10,000)</p>	<p>Continue</p> <p>Implement new volunteer communications & recognition strategy</p>	<p>Assess and schedule ongoing leadership training</p> <p>Budget approved</p>
2011 4 th	<p>Holiday/end-of-year ask</p> <p>Capital Campaign goal reached (or project into 2012)</p>		
2012 1 st	<p>Decide: financing to purchase</p>		<p>ReStore income added to revenue</p> <p>Determine AmeriCorps ask</p>
2012 2 nd	<p>Contract to purchase; Plan communications and thank yous at Annual Breakfast</p> <p>Annual Breakfast</p>		<p>Hire new Volunteer Manager to start June</p> <p>Decide re hire of site supervisor</p>
2012 3 rd	<p>Purchase new space</p>		<p>Budget approved</p>

	Research planned giving		
2012 4 th	Holiday end-of-year ask Develop planned giving year-round campaign		
2013 1 st			
2013 2 nd	Implement planning giving campaign, kick off at Annual Breakfast		

Willamette West Habitat for Humanity Stakeholder Research Themes

During strategic planning, Willamette West Habitat worked with The Canoe Group to design, implement and analyze perceptions and feedback from the core WW Habitat stakeholder groups.

Current donors, current/past volunteers, staff and board members, government representatives, corporate representatives, past board members, large donors and members of the faith community were interviewed and/or surveyed. The following themes emerged from the research. During strategic planning discussions, Board and staff leaders examined the research results and crafted a short list of key assumptions that informed the Strategic Plan. Stakeholder research themes identified by The Canoe Group included:

1. WW Habitat's mission at the highest level (i.e. providing affordable housing to families in need) is widely known by the groups surveyed during the research. However, the uniqueness of WW Habitat's work in comparison to other affiliates and Habitat International (i.e. understanding the geography you serve, how your program works) is much less known and understood. This reinforces assumptions held by many staff and Board and should be considered as core of future marketing and community engagement efforts.
2. Fifty percent of the donors who responded to the online survey identified themselves as WW Habitat volunteers. Overall, when presented with multiple reasons for donating "I donated as a result of my volunteer experience" was NOT a primary motivator but was of secondary importance. This suggests many of your current donors **began** their relationship with WW Habitat through volunteer involvement. Placing additional emphasis on how you manage and deepen your relationships with volunteers will provide them with a more meaningful experience and stimulates fundraising.
3. Word of mouth marketing is very important to WW Habitat's success. "Friend" was the most common way individuals found out about WW Habitat. However, this may be the current reality because your organization has not undertaken regular outreach, marketing or advertising, leaving word-of-mouth as the only method through which individuals learn of your activities.
4. The fact that WW Habitat is faith-based was not a primary motivation for giving (for your current donors). However, faith-based organizations and churches play an important role in outreach and in introducing people to WW Habitat.

5. Your donors live in Washington County, are married, have household earnings of \$50K or more and average 55-64 years of age.
6. WW Habitat's newsletter is known and effective (to stakeholders interviewed and surveyed). Your Facebook and other social media presence is not well known or used by either internal or external audiences.

The Board and staff developed the following assumptions as to the organization's strengths, weaknesses, opportunities and threats during the course of strategic planning discussions:

It is likely that the traditional business model for Habitat for Humanity will change in the coming years and we need to begin to explore a new business model. Government support is likely to decrease, and our affiliate (along with other Habitat affiliates across the country) must adapt by development new resources to support our mission. We will need to strengthen our fundraising, and explore/learn more about generating funds through strategies like ReStore. Our involvement with other successful Habitat affiliates and other nonprofits can help us learn and adapt.

People want to give to Willamette West Habitat because they know and understand our mission, see the impact in what we do, and have the desire to help.

Volunteers arrive primarily through person-to-person word-of-mouth; 50% of our donors have previously volunteered for our organization. We build support when we get people involved "hands-on" and then build a relationship from there. We can nurture, enlarge and improve our volunteer "pathway" to grow long-term relationships with those whose lives we touch.

"Habitat" is known and admired. Through the work of our national organization and strong affiliates, the public knows Habitat for Humanity, although the specifics of how we work and build homes are less well known. However, ***Willamette West Habitat isn't as well known.***

Key leaders and our communities do not know or understand the "territory" of affordable housing or affordable home ownership yet. How we work and what we do and provide – and why we are so important to the community – is not well understood.

Plans and goals will change. If we track results, measure and learn from what is happening along the way, we will be able to adapt when opportunities or challenges come to us.

The next phase of Willamette West Humanity's growth will move us from being a "block builder" to being a "neighborhood builder". Our national organization has

studied the arc of organization growth in Habitat affiliates. We have entered a phase of growth with predictable challenges as the roles of Board, paid staff and volunteer committees change.

