

ANNUAL PLAN - 2019

Strategic Plan

Operational Plan & Community Impact

Strategic Plan 2013-2024

Vision: Habitat sees a world where everyone has a decent place to live.

Mission: Seeking to put God's love into action, Habitat brings people together to build homes, communities & hope.

Cost of Home National Advocacy Amplifier
 Habitat Texas State Advocacy Ambassador
 Waco Housing Coalition Officer
 Prosper Waco Bank-On Ambassador

2,952 Volunteers
 11,056 Hours
 \$266,892 In-Kind Labor

Tithe: Global Impact
 \$605,127
 183 homes built in El Salvador & Nicaragua

Build Community Impact

175 New Homes
 440 Repairs

IMPROVE HOUSING CONDITIONS

- Enhance home ownership for families through collaborative partnerships and education
- Serve neighborhoods by offering approaches and products that result in sustainability

Approaches to Impact Community:

- Homeownership Partner Program
- Owner-Occupied Repairs Program
- ReStore Building Materials Warehouse

Build Sector Impact

PARTNER TO INCREASE SHELTER ACCESS

- Create innovative partnerships that expand and diversify housing opportunities
- Leverage Habitat brand with people who govern, give and live in McLennan County to advance affordable housing

Approaches to Impact Sector:

- Policy & Education
- Coalitions & Boards
- Civic Engagements

Build Societal Impact

INSPIRE ACTION TO END POVERTY HOUSING

- Create a larger and more active volunteer base to advance our mission & vision for affordable housing
- Mobilize the broader community to advocate and act on the need for neighborhood transformation through affordable housing

Approaches to Inspire Action:

- Volunteer Engagement
- Advocacy
- Tithe & Global Village

Build A Sustainable Organization

MOBILIZE RESOURCES AND STEWARD THEM FAITHFULLY

Fund the mission

Grow skills & leadership capabilities

Operate with excellence

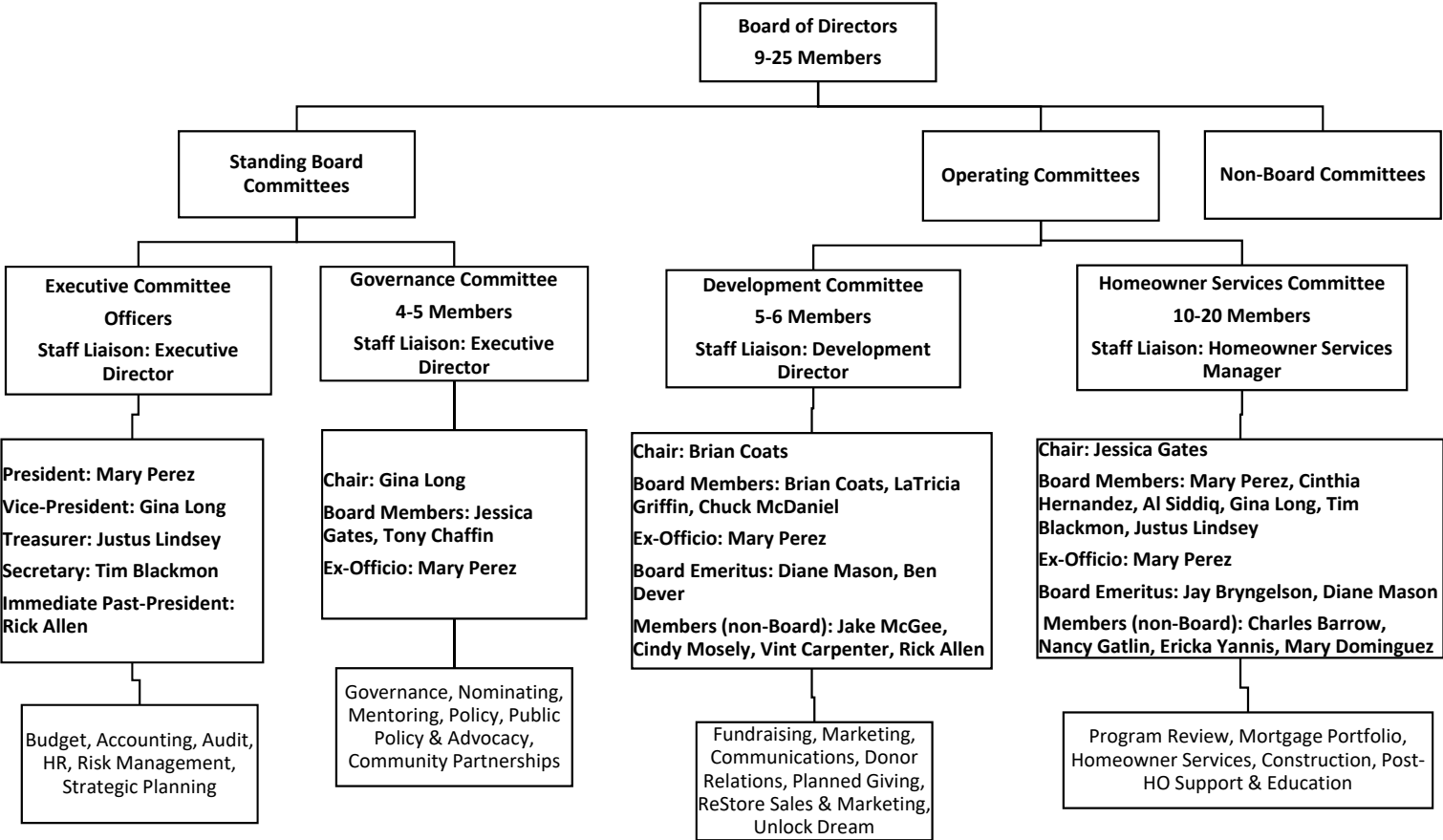
FY 2019-2020 BUDGET:
 \$1,875m124 Revenue
 \$1,846,612 Expenses

Board Goals: FY 2018-2019

Reporting FYE 6.30.2019

GOAL AREA	STATEMENT or MEASURE	ACHIEVEMENT or PROGRESS	NOTES and COMMENTS
Individual Giving	<ul style="list-style-type: none"> 100% of Board Members make annual contribution 100% contribute to Habitat Harvest (donation or in-kind) 	89% 90%	16/18 voting Board Members + 3/3 Emeritus Members 19/21 + 3 Emeritus Members
Faith Engagement	<ul style="list-style-type: none"> 100% of Board Members' faith communities volunteer on annual basis (i.e., special event, construction, ReStore, administration, meal, etc.) 	20%	Yes – 4 No – 4 Unknown – 4 Blank – 8
Corporate Support	<ul style="list-style-type: none"> 100% of Board Members' places of employment will be offered opportunity to have Waco Habitat for Humanity as a recipient of employee-selected paycheck donations 	18%	Baylor University – under advisement
Giving Clubs	<ul style="list-style-type: none"> Each Board Member will attend one build or dedication each year Each Board Members will make an “ask” for Club membership 	67% (Board) 71% (ALL) 0%	12 of 18 Members + 3/3 Emeritus Members No Club Membership solicitation reported – will devise data collection tool
Marketing	<ul style="list-style-type: none"> Conduct comprehensive marketing analysis Be cognizant of opportunities to advertise w/ Spanish-speaking media outlets 	100% 100%	Staff-initiated marketing projects through Baylor Program brochures translated; KWTX advertising in Spanish market under advisement, iHeart Radio, KWBU
Donor Recognition	<ul style="list-style-type: none"> Board Members will make monthly phone call, email, letter or card to thank donors Consider “swag” for giving club members Consider a Volunteer Thank You event 	67%	9 voting members + 3 Emeritus Members participated Staff purchased “swag” for community events Staff organized Volunteer Appreciation Day 4/25/2019
Board Development	<ul style="list-style-type: none"> Board Members will support each other through use of monthly socialization time from 5:00 pm to 5:30 pm immediately preceding regularly scheduled Board Meeting Board will engage elected officials and other key personnel in quarterly strategy, education and advocacy opportunities during regularly scheduled Board Meeting Board Members will engage in local, state and national opportunities to increase knowledge on affordable housing and Habitat for Humanity methods and practices 	100% 100% 100%	Board Members utilized portion of set-aside time for socialization & thank you's Hammer Time w/ local, state & federal officials re: HOME & TDHCA funds impact on homeowners HFHI policy updates; NLIHC policy updates; sign-on letters for federal FY 2019 budget; HFHI governmental relations updates & calls to action; Habitat TX priorities; Habitat on the Hill & virtual advocacy; Day at the Dome; World Day of Prayer (& virtual participation)

BOARD ORGANIZATIONAL STRUCTURE FY 2019-2020



STAFF OUTCOMES: FY 2018-2019

STAFF OUTCOMES FY 2018-2019 MISSION SERVICES	FY 2018-2019 STAFF METRICS	COMMENTS	ACHIEVEMENT 07.01.2018 – 6.30.2019
New Home Construction 173 homes sold since 1986	5	Harvest House, Legacy Build (Clifton), Faith Build, Raise the Roof, Builders Build, Bankers Build	40 % (Dec 2018 and Feb 2019) {1 house start Mar 2 nd (90%) and 1 Recycle (75%) in progress} Dedication Jun 25 House #3 (1305 N. 10 th Street) – sale pending
Home Repairs 432 home repairs since 2007	20	CDBG pilot program w/ City of Waco; extinguish waiting list; target core blocks in key neighborhoods	35% (7 of 20 projects complete, 4 in progress) 56 Program Inquiries & 38 Applications & 23 Home Assessments For Minor Repairs Program w/ COW
ReStore Sales In operation since 2001	\$575,000	Focus on key ROI data on purchased goods Specials: St. Patrick's Day, Mothers Day, Fathers Day, End-of-Year Brick & Block Sales: Fall (10/20), Elf (12/7), Spring (4/27)	\$524,408 annual sales 91% of annual goal
ReStore Donations	1 new distribution center	Continue tracking major donors impact on ReStore; Develop relationship w/ one new distribution center	0% No new distribution center to date
ReStore Diversion (30.08 per ton)	Develop glass diversion	Develop glass diversion program; continue tracking donations and diversion impact on community	0% No glass diversion program
Mortgage Stewardship	85% overall 10% >90-days	Maintain overall stewardship of at least 85% with no more than 10% of homeowner > 90-days delinquent	82% of 111 mortgages pay on time (96% of goal) 14 Mortgages > 90 days delinquent = 12.9% (29% off goal)
Home Repairs Payback	60% overall 50% @ 5 years 55% @ 4 years 60% @ 3 years 70% @ 2 years 80% @ 1 year	Build success with implementation of revised policy statement; recruit and train new team leader for program; consider educational program to support families struggling with home repairs and effective budget management	62% of average of 61 payback agreements payment compliant 100% of goal
Homeowner Pipeline	12 months 6-8 partners	Offer information meetings monthly to engage applicants	100% of goal (16 months pipeline) 8 partner families 985 contacts; 48 businesses; 136 questionnaires (93% denied)
Volunteer Engagement (\$24.14 per hour) 80% of building accomplished w/ vols	12,000 hours 2,500 events 40 groups	Recruit, train and retain individual & group volunteers Educate volunteers about giving opportunities Grow volunteers into donors	11,056 Volunteer hours = 92% of annual goal \$266,892 In-Kind Volunteer Labor 2,966 Volunteer events = 118% of goal 77 Groups engaged = 193% of goal 2,952 Individuals engaged

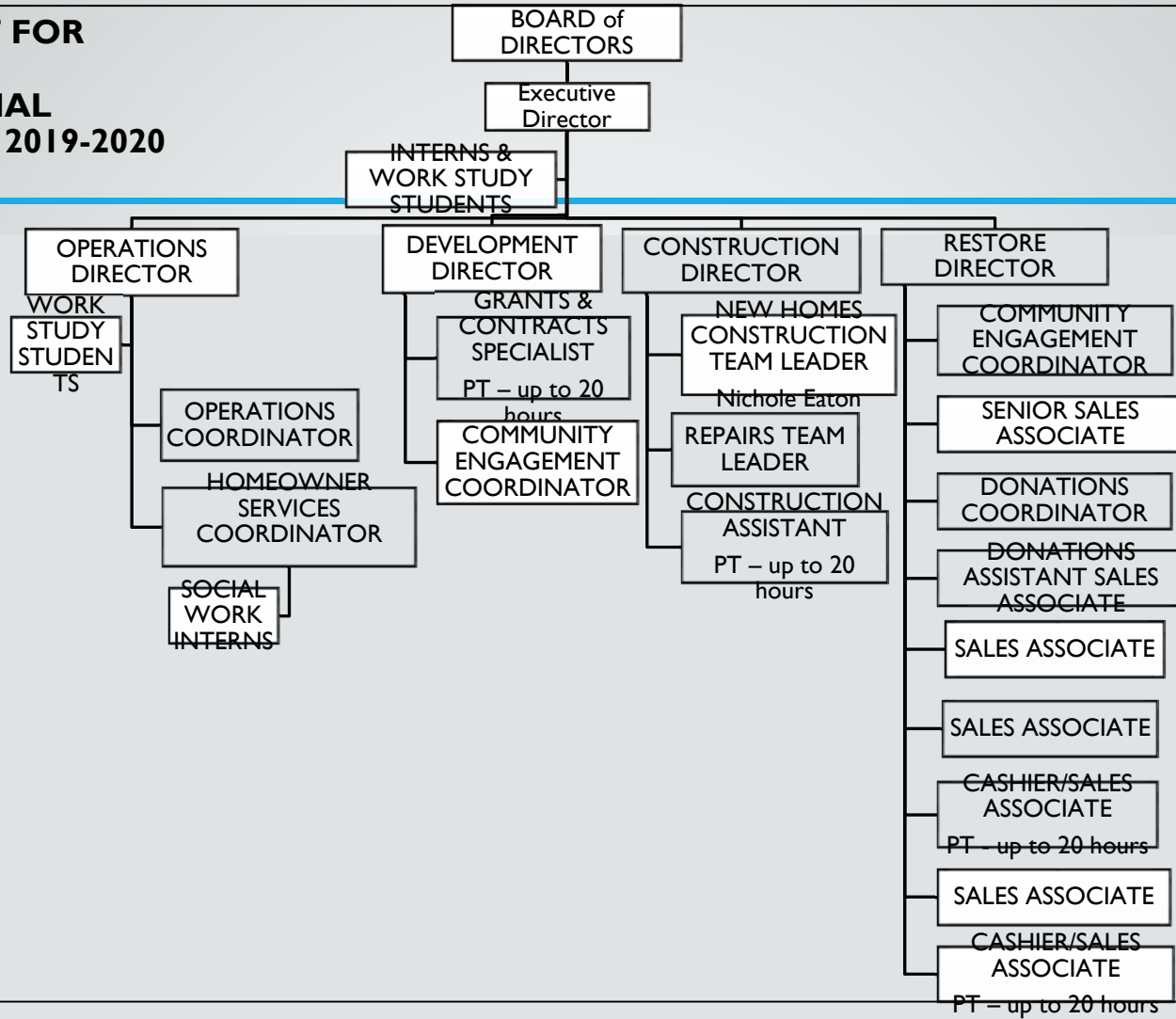
WACO HABITAT FOR HUMANITY

VISION 2020 AND BEYOND

GROWING & STRENGTHENING WACO HABITAT FOR HUMANITY

STRATEGIC GOAL: OVER THE NEXT 10 YEARS, WACO HABITAT FOR HUMANITY WILL CREATE A MIXED INCOME AFFORDABLE HOUSING COMMUNITY IN MC LENNAN COUNTY

WACO HABITAT FOR HUMANITY ORGANIZATIONAL STRUCTURE: FY 2019-2020



BUILD A SUSTAINABLE ORGANIZATION

STRATEGY	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
I – Fund the mission through comprehensive resource development activities					
Ia – ReStore Operations	\$550,000	\$575,000	\$600,000 Expand hours/days operation	\$625,000	\$650,000
Ib – Individual Gifts	\$100,000	\$105,000	\$110,000	\$115,000	\$120,000
Ic – Legacy Gifts	Add 1 Legacy Gift Increase Endowment by 5%	Add 1 Legacy Gift Increase Endowment by 5%	Add 1 Legacy Gift Increase Endowment by 5%	Add 1 Legacy Gift Increase Endowment by 5%	Add 1 Legacy Gift Increase Endowment by 5%
Id – Corporate Gifts	\$60,000	\$60,000	\$65,000	\$70,000	\$75,000
Ie – Church Gifts	\$10,000	\$12,500	\$15,000	\$17,500	\$20,000
If – Foundation Gifts	\$225,625	\$230,000	\$235,000	\$240,000	\$245,000
Ig – Public Funds	\$324,000 Mortgage Asst Loan \$244,000 Construction Svcs	\$396,000 (6 houses) \$100,000 (repairs)	\$396,000 (6 houses) \$100,000 (repairs)	\$396,000 (6 houses) \$100,000 (repairs)	\$396,000 (6 houses) \$100,000 (repairs)
Ih – Special Events	\$100,000 (Harvest, Art Show, Spring Event)	\$105,000	\$110,000	\$115,000	\$120,000
2 – Grow skills and leadership capabilities for Board & Staff	Lone Star Summit Habitat on the Hill Race Relations Training HUD Certification Board Member Training Orientation & Annual Refresh Global Village Trip Nonprofit Network Staff Training Plan Leadership Waco	Lone Star Summit Habitat on the Hill HFHI-US Conference HUD Certification Board Member Training Orientation & Annual Refresh Nonprofit Network Staff Training Plan Leadership Waco	Lone Star Summit Habitat on the Hill HUD Certification Board Member Training Orientation & Annual Refresh Nonprofit Network Staff Training Plan Leadership Waco	Lone Star Summit Habitat on the Hill HFHI-US Conference HUD Certification Board Member Training Orientation & Annual Refresh Nonprofit Network Staff Training Plan Leadership Waco	Lone Star Summit Habitat on the Hill HUD Certification Board Member Training Orientation & Annual Refresh Global Village Trip Nonprofit Network Staff Training Plan Leadership Waco
3 – Operate with excellence	No audit findings Reports submitted on time Meet performance metrics				

BUILD COMMUNITY IMPACT

#	OPERATIONAL GOAL STATEMENTS	GOAL CONSIDERATIONS	RESULTS	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
	Enhance Education & Support Services	<ul style="list-style-type: none"> Homebuyers (Partners & Community) Homeowners Homeowners College Default Mortgage Holders/Foreclosure Advocacy campaign Communitywide education re: mission 	Provide homebuyer education 3 per year Offer homeowner college 2 x's per year Offer post-purchase education 2 x's per year Offer counseling as need identified Engage in national advocacy campaign Engage in community events and offer education on WHFH services & supports	X X X X X X				
	Build Faster & Increase Production	<ul style="list-style-type: none"> Care-A-Vanners (grant for land & develop camp site) Outfit 2nd construction trailer & tools Engage 2nd construction team Purchase more lots in closer proximity to each other Theme house builds 	Utilize Care-A-Vanners (Q3) Care-A-Vanners helps w/ research (Q3) 2 nd Trailer, Tools & Team FY 2020-2021 (Q2) FY 2019-2020 and annually thereafter Themed House Builds: Harvest, Raise the Roof, Pitts, Legacy (Clifton, Hoppenstein), Bankers, ReStore, Builders, Women, Faith, Thrivent, etc.)	5 homes 20 repairs	X X	X	X Develop Site	
	Foster community w/ Staff, Volunteers, Clients and supporters	<ul style="list-style-type: none"> Encourage Staff Help Each Staff see how they make a difference Engage Staff Members to the max Retain quality staff members 	Quarterly enrichment days for All Staff Quarterly community service opportunities Staff training plan budgeted & executed Retain at least 80% of workforce	X X X X				
	Serve McLennan county with homebuyer and repair construction opportunities	<ul style="list-style-type: none"> Expand homebuyer program to McLennan County Assure effective marketing throughout county for potential homebuyers, owner-occupied repairs, volunteers and donors 	Develop expansion plan Explore available land/lots Foster underwriting for house construction Market program in new areas of county Engage homebuyers for program Engage homeowners for repairs Expand program to new areas	X	X X X X X		X	

BUILD SECTOR IMPACT

#	OPERATIONAL GOAL STATEMENTS	GOAL CONSIDERATIONS	RESULTS	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
	Develop Comprehensive Housing Plan	<ul style="list-style-type: none"> Explore variable housing options (i.e., Duplexes, Mixed Income Communities, etc.) Expand beyond Waco Public input from county 	Visit TX affiliates (Q1) Review processes (Q2) Community Meetings (Q3) Develop plan by FYE (Q4)	X Research & Planning	X Research & Planning	X Implement Plan		
	Expand Loan Financing Options	<ul style="list-style-type: none"> Serving people >80% AMI Proceeds = support HFH building efforts Create Building Subsidiary Effectively serve people 60%-80% AMI Create Fundraising Campaign for Each Build 	Visit affiliates (Q1-Q2) Review policies & procedures (Q3-Q4) FY 2020-2021 FY 2020-2021 FY 2019 and annually thereafter	X X X	X X X			



BUILD SOCIETAL IMPACT

#	OPERATIONAL GOAL STATEMENTS	GOAL CONSIDERATIONS	RESULTS	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
	Define Pay-to-Play Volunteer Days	<ul style="list-style-type: none"> Identify certain "pay days" for volunteers 	Research other affiliates (Q1) Review policies & procedures (Q2) Develop Pay to Play Plan by 12/31/2019	X X X				
	Identify & Foster Key Relationships	<ul style="list-style-type: none"> Businesses, Individuals, Churches, Events at Businesses Effectively engage youth (i.e., children, adolescents, young adults and young professionals) 	Businesses: Name them Churches: Name them Events: Name them Volunteer Appreciation Event Donor Appreciation Event Create youth engagement plan Effectively engage youth	X X X X X X	X			
	Develop comprehensive marketing and communications plan	<ul style="list-style-type: none"> Newsletter Annual Report Social Media Newspaper Magazines TV Radio End of Year Appeal Special Campaign Carpenters Club Appeal Mass Marketing Marketing Brochures Website presence 	Quarterly enrichment days for All Staff Quarterly community service opportunities Staff training plan budgeted & executed Retain at least 80% of workforce	X X X X				

