



**Habitat for Humanity Sarasota, Inc.
FY 2017 – 2020
Strategic Plan**

Approved October 4, 2016

Habitat for Humanity Sarasota, Inc.

Build Community Impact

IMPROVE HOUSING CONDITIONS

- Serve more families within a 30-80% area median income with sustainable homeownership
- Strengthen the quality and number of education opportunities for our homeowners
- Improve housing conditions through sustainable construction

Build Sector Impact

PARTNER TO INCREASE SHELTER ACCESS

- Expand strategic external partnerships
- Increase communication and outreach

Build Societal Impact

INSPIRE ACTION TO END POVERTY HOUSING

- Grow the volunteer core

Build A Sustainable Organization

- Enhance Habitat's presence in the region, state and nonprofit sector

- Mobilize Board of Directors in new ways
- Diversify financial resources & enhance cash reserves

MOBILIZE RESOURCES AND STEWARD THEM FAITHFULLY

- Create specific and scalable organizational structure



Build Community Impact

Habitat for Humanity Sarasota, Inc.

Goal: *Between FY2017 – FY2020, Habitat for Humanity Sarasota, Inc. will expand its services to directly assist 66 families locally to improve their housing situation.*

Strategic Objective

Approach

Metrics and Targets

Serve more Sarasota families within a 30-80% Area Median Income (AMI) with sustainable homeownership

- Re-engage the Land Acquisition Committee (LAC)
- Target large parcel, contiguous land purchase opportunities
- Increase homeownership
- Create recruitment plan to meet benchmark of families served annually

- LAC has a defined role and process for land purchase
- Increased land inventory measured by: 14 lots by Q4 FY2017; 18 lots by Q4 FY2018; 22 lots by Q4 FY2019
- New construction or rehabilitation projects as measured by: 12 homes in FY2017; 14 homes in FY2018; 18 homes in FY2019; 22 homes in FY2020
- Qualified families meet 125% of the construction goal as measured by: 15 families by Q4 FY2017; 18 families by Q4 FY2018; 23 families by Q4 FY2019; 28 families by Q4 FY2020

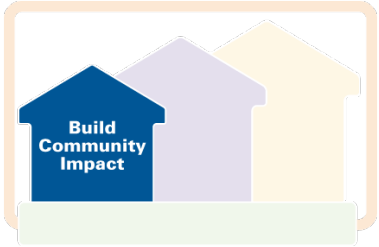


Build Community Impact (cont.)

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Goal: Between FY2017 – FY2020, Habitat for Humanity Sarasota, Inc. will expand its services to directly assist 66 families locally to improve their housing situation.

| Strategic Objective | Approach | Metrics and Targets |
|------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <i>Strengthen the quality and number of education opportunities for our future homeowners</i> | <ul style="list-style-type: none"> ➤ Create multiple access points for potential homeowners to apply ➤ Community outreach to employers, churches, schools and other non-profit agencies | <ul style="list-style-type: none"> ➤ Online application developed ➤ Online calendar created to schedule orientation classes ➤ Orientation class available online as a webinar ➤ Increased homeownership applications ➤ Qualified applicants increased directly from referrals |
| <i>Improve housing conditions through sustainable construction</i> | <ul style="list-style-type: none"> ➤ Meet or exceed Florida Green Building Coalition ratings on new construction | <ul style="list-style-type: none"> ➤ New builds receive a Green Certification from Florida Green Building Coalition |



Build Community Impact (cont.)

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|----------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <i>Streamline construction for greater efficiencies</i> | <ul style="list-style-type: none">➤ Refine "volunteer" building model➤ Create a "subcontractor" building model | <ul style="list-style-type: none">➤ Increased number of volunteers➤ Project Management provided by staff➤ Created a network of subcontractors➤ Expanded build days to a 5 day work week➤ Habitat safety policies & procedures included in all contracts➤ Balanced use of subcontractors with volunteer support |



Build Community Impact (cont.)

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Strategic Objective

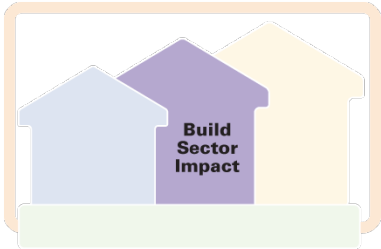
Approach

Metrics and Targets

Streamline construction for greater efficiencies (cont.)

- Reassess use of building & supply resources for greatest efficiency
- Improve build site training & safety

- Standard design specifications
- Purchased tools & supplies
- Rented offsite warehouse storage space for tools & materials
- Developed volunteer orientation/registration process that includes safety waiver & code of conduct documents
- Build site management procedures includes volunteer paperwork completion & onsite orientation
- Online resources provided for increased safety awareness
- Continued safety inspections performed



Build Sector Impact

Habitat for Humanity Sarasota, Inc.

Goal: *Between FY2017 – FY2020, Habitat for Humanity Sarasota, Inc. will develop services, financing, policies and procedures to prepare for increased build schedules and more families served.*

| Strategic Objective | Approach | Metrics and Targets |
|------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <i>Expand strategic external partnerships</i> | <ul style="list-style-type: none"> ➤ Expand our reach to donors, philanthropic partners & faith based organizations ➤ Build deeper relationships with local government entities | <ul style="list-style-type: none"> ➤ Participation on committee at the Sarasota Chamber & other related organizations ➤ Participation on government committees |
| <i>Increase communication and outreach</i> | <ul style="list-style-type: none"> ➤ Create a comprehensive PR/Marketing/ Communications Plan ➤ Quarterly communication to constituents | <ul style="list-style-type: none"> ➤ Increased media coverage ➤ Publicized document that promotes intangible benefits (safety, health, self respect, education) ➤ Increased online presence ➤ ReStore financial contribution & good stewardship of in-kind donations included ➤ Promoted the commitment & dedication of homeowners (sweat equity hours, education workshops, 0% interest mortgages) ➤ Published testimonials from homeowners, volunteers & donors ➤ Promoted the sustainability & energy efficiency features of the homes |



Build Societal Impact

Habitat for Humanity Sarasota, Inc.

Goal: *Between FY2017 – FY2020, Habitat for Humanity Sarasota, Inc. will mobilize volunteers and serve as a leading voice in affordable housing*

| Strategic Objective | Approach | Metrics and Targets |
|---------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <i>Grow the volunteer core</i> | <ul style="list-style-type: none">➤ Create additional volunteer opportunities➤ Create a volunteer recruitment plan | <ul style="list-style-type: none">➤ Established partnerships with technical schools and churches➤ Youth community involved as next generation of volunteers➤ Recruited volunteers with specific skills➤ Recognition and appreciation of volunteers➤ Cultivate intermittent volunteers➤ Volunteers trained as ambassadors |



Build A Sustainable Organization

Habitat for Humanity Sarasota, Inc.

Goal: *Between FY2017 – FY2020, Habitat for Humanity Sarasota, Inc. will improve our capacity to mobilize financial and human resources and steward them faithfully.*

| Strategic Objective | Approach | Metrics and Targets |
|----------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Diversify financial resources and enhance cash reserves | <ul style="list-style-type: none"> ➤ Reassess banking relationships ➤ Increase operational cash reserves ➤ Expand use of Community Contribution Tax Credit Program (CCTCP) sponsors ➤ Create a development plan including a planned giving program ➤ Continue use of the Florida Housing Finance Agency programs | <ul style="list-style-type: none"> ➤ Florida Community Loan Fund relationship intact ➤ Operational cash reserves set aside: \$250,000 ➤ Maintained a mortgage delinquency rate of less than 6% ➤ Disaster Preparedness Plan created ➤ Secured CCTCP sponsorships as measured by: 2 in FY2017; 3 in FY2018 ➤ Recruited council of professionals (attorneys, trust officers, CPA's, financial advisors) to assist in the planned giving program ➤ Maximized funding – 25% of the selling price per home |



Build A Sustainable Organization (cont.)

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| Enhance current ReStore financial contribution while being good stewards of in-kind contributions | <ul style="list-style-type: none"> ➤ Streamline current locations to maximize efficiencies and revenues | <ul style="list-style-type: none"> ➤ Developed a ReStore specific marketing plan spanning 2 years ➤ Found new strategic drop off locations ➤ Expanded the 17th Street complex and/or additional locations |
| Create specific and scalable organizational structure | <ul style="list-style-type: none"> ➤ Enhance administrative staff capacities ➤ Increase retention of current staff | <ul style="list-style-type: none"> ➤ Hire a construction field manager and support staff ➤ Hire a finance assistant & administrative assistant ➤ Hire a development & communications personnel ➤ Remain current on job descriptions, benefits, professional development & salaries compared to the market and talent |



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| Mobilize Board of Directors in new ways | <ul style="list-style-type: none"> ➤ Increase the number of board members and potential board pipeline ➤ Improve board members’ understanding of their roles & responsibilities | <ul style="list-style-type: none"> ➤ Improved board officer succession, leadership and committee participation ➤ Board governance includes a recruitment strategy ➤ Term limits reviewed ➤ 16-20 board members is the goal ➤ Board members consider Habitat one of their top philanthropies ➤ 100% of board members make a financial contribution ➤ Each board member identified 2 potential major donors per year ➤ Board members participated in all major fundraising events ➤ Each board member participated in at least one build per year & attended one home dedication |



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| Enhance Habitat’s presence in the region, state, and nonprofit sector | <ul style="list-style-type: none"> ➤ Participate in regional and state collaborative meetings with other Habitat affiliates | <ul style="list-style-type: none"> ➤ Participation in Habitat’s State Support Organization ➤ Partnership with Habitat of Humanity International ➤ Participation in regional & national conference |