



13th Annual Habitat for Humanity State Conference

Marriott Northwest Columbus

5605 Blazer Parkway

Dublin, Ohio

Plenary Session Wednesday, November 9, @ 10:00 A.M.

From the talk to the walk: Leveraging communications to live into our potential

Led by Amy Dunham, Chief Communications Officer, Habitat for Humanity International

Across our network, we share a vision: a world where everyone has a decent place to live. Both due to and despite our federated model, the broader world sees one Habitat; for those of us on the inside, it may not always feel quite so unified. We talk often about the value of our brand, and of the stories we tell to the world about our work. But we don't spend nearly as much time focused on how we talk to *ourselves* within the network that the world sees as one entity. Join Habitat for Humanity International Chief Communications Officer Amy Dunham for a conversation about how we define "we" and "they," the value of brand differentiation within our network, and how communications can equip us with the means to start showing up differently to deliver mission impact – together.

Plenary Session Wednesday, November 9, @ 11:00 A.M.

Impact matters: How data fuels growth and transformational impact

Led by Sam Azar, Senior Director, U.S. Research and Measurement and Korinne Chiu, Director, Outcome Measurement, Habitat for Humanity International

Data permeates our lives in ways that few could have imagined even just 10 years ago, let alone during the times of Habitat's humble beginnings in Americus, GA. Rigorous evaluation is now no longer a "nice to have", it's an expectation. Institutional funders expect more rigorous evidence, individual donors are increasingly results-focused, and over 90% of nonprofits evaluate their programs.

We know that Habitat for Humanity's impact is more than just the number of houses we build or repair—our work contributes to transformational change for individuals and communities around the world. But how do we prove it to those who haven't seen it or lived it? How do we tell a compelling impact story that builds data and evidence into the narrative?

In this session, you'll learn more about how the statewide outcome measurement pilot in Ohio can help you accelerate your growth and impact and how Ohio is contributing to transformational change as we prepare to scale nationally. You'll also better understand how rigorous research can do more than fill bookshelves, collect dust, or intimidate your enemies – you'll see how it can help Habitat demonstrate impact, catalyze systems change, and drive organizational growth.

Ohio ReStore Council Meeting

Led by Ted Spencer, ReStore Manager, Habitat for Humanity Findlay/Hancock County

The Ohio ReStore Council, formed in 2010, provides an effective forum to communicate and network with ReStores in Ohio. Membership on the council is open to any ReStore in Ohio, and the annual meeting is open to the public. This is a great opportunity for ReStore leaders to share best practices and elect their leadership team for the coming year.

Session One Wednesday, November 9, @ 1:00 P.M.

Supporting the affiliate network: Tools to better serve the mission

Led by Susan Dersch, Associate Director, Compliance Solutions, Habitat for Humanity International

The session will provide a guide on how to collaborate with U.S. Office to minimize risk to the brand and to learn more about the nuances of affiliate compliance. Attendees will:

- Understand situations of struggling affiliates and how neighboring affiliates can help
- Have a quick reference list of opportunities to connect with affiliate neighbors and improve overall production and efficiency
- Have a greater understanding of the how U.S. Office supports affiliates and hear examples of successful strategies used by U.S. Office

Equipping Habitat to tell our impact story through Research and Measurement

Led by Korinne Chiu, Melissa Rivera, Kathleen Chaballa and Krys Johnson O'Leary

This session will provide affiliate leaders at all levels with options of how research and measurement can be used to tell Habitat's impact story. This interactive session will focus on sharing resources and evidence from Ohio homeowners, affiliates, and beyond to communicate Habitat's impact to different stakeholders. Members of HFHI's U.S. Research and Measurement team will share resources developed and participants will have the opportunity to break into working groups to apply resources and data to meet current affiliate needs. The session will provide attendees the opportunity to:

- Identify the value of engaging in research and outcome measurement
- Consider resources and evidence to support fundraising, advocacy, and/or program improvement
- Address issues and explore opportunities related to engaging with the research and measurement pilot

Balancing store operations while supporting a robust donation stream

Led by Kate Pifer, Senior Specialist, Habitat for Humanity International

Store leaders are busy and wear many hats; successful donor outreach only adds additional work to the long list of to-do items. Finding a balance between supporting store operations and continuing to grow donor partnerships is essential to successful growth strategies. In this session attendees will discuss engagement strategies, partnership opportunities and time management tips to support working to build ongoing giving partnerships with businesses in their geographic service area. After this session, attendees will be able to:

- Identify a current market challenge that is preventing proper time allotment to donation outreach.
- Apply strategies to provide a pre-determined amount of time to dedicate to donation outreach.
- Prepare their own elevator speech to use when meeting a potential business donor.
- List three reasons why a business donor would want to donate to Habitat for Humanity.

A deep dive into development

Led by Kenneth Oehlers, Executive Director, Habitat for Humanity of Southeast Ohio

This is your opportunity to have the fundraising discussions you've dreamed about during the pandemic...back when in-person meetings were not an option. Bring your questions, best practices, and ideas to share with your development colleagues. In this interactive session, attendees will engage in a fun and meaningful way while focusing on the following areas:

- Peer-to-peer discussions on cultivation/prospecting
- The ask
- Dealing with objections
- Stewarding gifts

Financial accountability and best practices for your affiliate

Led by Gary Fruechtenicht, Assistant Controller, Habitat for Humanity International

Is your affiliate struggling with financial ratios and accountability? Learning through the lens of a 101 or 201 financial understanding level, attendees will learn the most important and basic financial concepts to promote accountability. All concepts discussed and practiced can be used at any affiliate level, but the process is most relevant for small and medium sized affiliates searching for proven techniques, tools, and templates. Larger affiliates searching for new ways to promote accountability will also learn new tips as well. Attendees will:

- Understand affiliate financial reports & fiscal health
- Identify the most important financial ratios and benchmarks
- Learn the importance of speaking the appropriate "financial language" of the board and staff
- Utilize multiple "plug and play" benchmark templates that can be customized for each affiliate

Session Two Wednesday, November 9, @ 3:00 P.M.

Recruiting, training and retaining high performance ReStore team members

Led by Kate Pifer, Senior Specialist, Habitat for Humanity International

Building strong qualified teams is harder now than ever for Habitat ReStores. This session will include innovative ways to recruit, train and retain a diverse, talented team for store operations. Participants will share best practices for the employee life cycle – including creating job descriptions, hosting team training events and establishing onboarding practices. Learning objectives: After this session, attendees will be able to:

- Create a culture that is welcoming and well received by new hires.
- Implement two new approaches to your current hiring process.
- Understand the importance of investing in employee retention

Rural communities and advocacy

Led by Audrey Johnston, Director of Rural Affairs

Affiliates working in rural communities play a critical role, often as one of the only – if not the only – affordable homeownership developer. One way to deepen your impact in your community is through advocacy. Serving as an advocate does not always require a lot of organizational capacity. By incorporating advocacy into your existing work, you can move the needle on issues that matter most to your organization and the families you serve. Join this session to learn about how HFHI is working on increasing capacity of affiliates in rural areas through advocacy and how affiliates in rural communities are using advocacy to build stronger relationships within their communities and improve home affordability.

What's in your sustainability toolbox?

Led by Kristen Sand, Senior Director of Expertise Hubs, Habitat for Humanity International

This session will provide attendees with the information and tools needed to strengthen their affiliate infrastructure and work towards building a sustainable organization. Join us for an interactive workshop that allows participants to learn through small group discussions, individual exercises and peer learning.

Attendees will:

- Learn how meeting the Good Standing Requirements and Quality Assurance Checklist support the sustainability of an affiliate.
- Become knowledgeable of the tools and resources available to support and strengthen the affiliate infrastructure.
- Learn how to increase partnership opportunities with neighboring affiliates and community organizations.

Mortgage solutions for Habitat affiliates

Led by Tomesha Davis, HMS Program Implementation, Habitat for Humanity International and Julie Vore, Associate General Counsel, Habitat for Humanity International

Attendees will engage in a broad conversation about the mortgage origination process. Presenters will also highlight the HMS-supported technology available to assist affiliates with the processing, underwriting and closing of mortgage loans. The platform is supported by Evolve Mortgage Services and provides more robust mortgage support than a software-only solution (such as Calyx). The platform supports the affiliate's production of high-quality mortgages while keeping the affiliate staff as the sole contact for the borrower.

Building a stronger board for the future

Led by Scarlett Boudier, President and Co-Founder, Advocacy and Communications Solutions

Openness, honesty, trust, and collaboration are key factors to a positive board experience. Coming out of the pandemic, it is even more critical to recruit diverse board members and to provide them the skills necessary to contribute and engage in a meaningful way. Habitat's past success is due to passionate board members working tirelessly to serve more families. However, future success will depend upon new strategies to help boards board member work smarter, not harder, to address the affordable housing crisis. The session will also focus on how to support Habitat's staff and volunteers during challenging times.

Laying a solid foundation for a repair program

Led by Joel Grimes, Director of Repair Services and Megan Golike, Senior Operations Program Manager, Habitat for Humanity of Greater Cincinnati and Jacob Wentz, Repair Manager, Habitat for Humanity of Findlay/Hancock County

Critical home repairs are needed now more than ever to keep individuals and families living safely and free of harm. Furthermore, there is not enough organizations or contractors to meet the growing demand for repairs in across Ohio. Join the roundtable discussion to learn how affiliate repair programs are working in urban and rural communities and how to maximize the use of grant funding. Attendees will come away with a better understanding of how to structure an effective repair program, thus providing an opportunity to serve more families.

Plenary Session Thursday, November 10, @ 8:30 A.M.

Habitat 2.0 financial model: Informing the path forward

Led by Sarah Mackey, Vice President, U.S. Transformation and Volunteer Services, Habitat for Humanity International

Join this interactive discussion on the Habitat 2.0 financial model and help shape an important change initiative for the US network. This conversation will provide an update on the work of the Habitat 2.0 financial model and is designed to answer your questions and gather your feedback on the latest iteration of the investment fee formula. The Habitat 2.0 financial model would distribute undesignated revenue to affiliates, establish a network fee structure to support and sustain funding for Habitat in the U.S. and globally, and enhance collaborative fundraising to grow the mission.

Session Three Thursday, November 10, @ 10:45 A.M.

Aging in Place with Housing Plus: Integrating health services in repairs

Led by Marissa Little, Vice President and Chief Program Officer and Priest Goode, Aging in Place and Faith Relations Coordinator

Housing Plus is a holistic approach to serving older homeowners with repairs and modifications so that they may remain in their homes and age in place. Two assessments make up the holistic approach--a functional assessment conducted by a health professional and a repair assessment conducted by the affiliate. This workshop will provide insight into both assessments, i.e., how to locate a health partner, how both assessments work together, typical modifications, and becoming Housing Plus certified.

Engage with Expertise Hubs

Led by Kristen Sand, Senior Director of Expertise Hubs, Habitat for Humanity International

HFHI Expertise Hubs support the on-the-ground impact of the U.S. affiliated network through the creation, connection and curation of resources, training and promising practices that address priority network needs. Join Kristen for a look inside the Hubs. Dive into questions like: what types of support do Expertise Hubs provide the US affiliated network, how does the affiliated network engage with Hubs and what support is coming up in the coming months? This workshop session will also seek input from you on content areas you would like to see more products or resources to support your ongoing local efforts.

Forget about the box: Developing creative solutions to community need

Led by Kenneth Oehlers, Executive Director, Habitat for Humanity of Southeast Ohio and Wendy McCormick, Executive Director, Habitat for Humanity of Findlay/Hancock County

In this session, attendees will discuss innovative ways to use the strengths of their affiliate to meet community needs. Presenters will discuss strategies to increase financial stability for families and help prepare them for home ownership through innovative programs that align with Habitat's mission. Attendees will also learn about social enterprise models that enable affiliates to generate revenue and serve more families. The session will focus on

- brainstorming/visioning,
- planning and implementation
- Funding mechanisms
- Sharing impact with stakeholders

From keeping up to pulling ahead in fundraising

Led by Sarah Mackey, Vice President, U.S. Transformation and Volunteer Services, Habitat for Humanity International

Fundraising collaboration within the Habitat network is essential to decreasing donor confusion and raising more resources for the entire network. Come learn more about Habitat's future state vision for collaborative fundraising and the roadmap for the work ahead. This session will provide the latest information on the collaborative fundraising work underway and answer your questions.

Engaging your elected officials at home and at the statehouse

Led by Audrey Johnston, Director of Rural Affairs, Habitat for Humanity International, Carrie Arblaster, Vice President of Public Policy, Philanthropy Ohio and Ian Weir, Director-Midwest, Albers and Co.

This session will provide a unique perspective from seasoned statehouse veterans on how to put your best foot forward when advocating for change. Attendees will learn the details of the legislative process and the benefits of mobilizing a statewide advocacy campaign. The session also will discuss creative ideas to engage elected officials and best practices to share your message through social media and other outlets. Attendees will come away with a blueprint for how to effectively advocate at the federal, state, and local levels.

Disaster preparedness: Business continuity planning

Led by Kate Pifer, Senior Specialist, Habitat for Humanity International

This session will familiarize affiliate leaders with the planning process to create a business continuity plan. We will discuss how to identify hazards within your communities and address planning goals for your affiliate. The business continuity plan will cover all potential hazards/disruptions to the affiliate. This session will implement these practices at your affiliate or review existing plans. Attendees will:

- Learn about key components and resources available to support Business Continuity Planning
- Identify risks and hazards that would impact your affiliate/business operations
- Start the creation of, or identify gaps within, a business continuity plan with the knowledge learned in this presentation