

***Strategic Planning – Accomplishment Report***  
***Quarter 2***  
***October – December 2022***

***Accomplishments Report: current quarter, Q2 Oct – Dec 2022***

***Engaging and Serving a Wider Community***

- *Goal: Short term rental pilot program implemented*
  - *Activity:* Program guidelines written and reviewed by committee, source of funding secured, HCV inventory has been considered, inquiries made to landlords, program discussed with potential participants
    - *Board Involvement:* Jim and Judy Benton have been supportive with landlord contacts.
    - *Status:* This goal is complete and ready to go as soon as we have a home buyer in need of a short-term rental and ready to move. We expect that to happen on May 1. In the meantime, we'll continue to work on establishing relationships with area landlords. Building these relationships will take time.

***Expanding Program Success***

- *Goal: Viability of Habitat mortgage model assessment completed*
  - *Activity:* Assessment of market pressures has been done, report to board and consideration of implications and options is awaiting space on the board agenda
    - *Status:* Assessment is complete and awaiting presentation time at a board meeting

***Strengthening Our Foundations***

- *Goal: Interdepartmental communication norms established and disseminated*
  - *Activity:* Survey sent to entire staff; feedback was analyzed, compiled, and presented to staff for discussion; initiatives implemented include: restructured weekly staff meetings, ongoing development of department dashboard metrics, quarterly all-staff gatherings, and regular mission-based reflections.
    - *Status:* Completed. New initiatives created and implemented, will continuously monitor and revise as needed.
- *Goal: Staff structural analysis completed*
  - *Activity:* Reviewed current staff structure, projected future growth needs, revised the organizational chart to reflect this review and projection, implemented most critical position needs and will continue to build capacity for future position onboarding as identified and as needed.
  - *Status:* Completed and ongoing.

- *Goal: Board Committees formed*
  - *Activity:*
  - *Board Involvement/Requests:*
  - *Status:*

**Accomplishments Update: ongoing progress Q2 2023 – Q4 2023**

***Engaging and Serving a Wider Community***

- *Goal: Stakeholder engagement plan developed by September 30, 2023*
  - *Activity #1:* Collaborative discussions in process regarding over-arching donor engagement/participation approach and operating standards. Beta testing with Huggins, CommScope.
    - *Board Involvement/Requests:* Members encouraged to be actively aware of opportunities where donors want to participate/engage with the affiliate; share with Development staff as appropriate
    - *Status:* In Process; 30% complete
  - *Activity #2:* Donor stewardship plan expanding to include standard process for outreach following event participation and gifting activity
    - *Board Involvement/Requests:* Seeking members who would be willing/available to make weekly Thank You calls throughout a given month
    - *Status:* In Process; 65% complete (Individuals), 25% complete (Major Donors)

***Expanding Program Success***

- *Goal: Capital campaign feasibility study completed by September 30, 2023*
  - *Activity:* Initial internal analysis in process to determine need, capacity, donor interest, etc.
    - *Board Involvement/Requests:* Members requested to be available for internal discussions regarding process
    - *Status:* In Process; 20% complete
- *Goal: At least 25 new donors attracted and retained by September 30, 2023*
  - *Activity:* 59 new donors for the period 10/01/22 through 12/31/22. (Note: Retention defined as 2<sup>nd</sup> gift/commitment within 13 months of initial gift/commitment)
    - *Status:* In Process; 5% complete
- *Goal: Home Buyer Success Program Developed (Q4)*
  - *Activity:* Program description has been drafted, plans for developing funding have been discussed with potential donors/advocates
    - *Status:* In Process