

Quarterly Calendar

Planning Area	Quarter 1: July–September	Quarter 2: October–December	Quarter 3: January–March	Quarter 4: April–June
HFHI Reporting and Dues	<ul style="list-style-type: none"> • July 20: Affiliate Statistical Report/House Production Report (ASR/HPR) Q4 of previous fiscal year due • July 31: Stewardship and Organizational Sustainability Initiative (SOSI) fee is due 	<ul style="list-style-type: none"> • Oct. 20: ASR/HPR Q1 due 	<ul style="list-style-type: none"> • Jan. 20: ASR/HPR Q2 due • March: Quality Assurance Checklist due 	<ul style="list-style-type: none"> • Mid-April: Financial Reporting to HFHI (IRS 990 due when taxes are filed) • April 20: ASR/HPR Q3 due • June 30: Tithe payments due
Habitat Oregon Reporting and Dues	<ul style="list-style-type: none"> • HFHO verifies Affiliate Statistical Report with each affiliate in order to allocate funds and generate dues (based off the HFHO Affiliate Point System) 	<ul style="list-style-type: none"> • Fall disbursement (contains funds from Oregon Charitable Tax Checkoff and The Collins Foundation Grant) and fiscal year first-half dues—both based off the HFHO Affiliate Point System 		<ul style="list-style-type: none"> • Spring disbursement (contains funds from donor-designated employee fund drives) and fiscal year second-half dues—both based off the HFHO Affiliate Point System
HFHI Events and Trainings	<ul style="list-style-type: none"> • TBA: New Affiliate Leadership Orientation (NALO) in Atlanta (for new EDs and board members) 	<ul style="list-style-type: none"> • December: AmeriCorps and VISTA HFHI applications can be submitted for next fiscal year staffing support 	<ul style="list-style-type: none"> • February or March: Habitat on the Hill in Washington D.C. • TBA: New Affiliate Leadership Orientation (NALO) in Atlanta (for new EDs and board members) 	<ul style="list-style-type: none"> • March: Biennial (odd years) International conference in Atlanta • TBA: ED retreat • TBA: Capacity Building Grant recipient training
Habitat Oregon Events and Trainings	<ul style="list-style-type: none"> • July 12: ASR/HPR training call • July 19, Aug. 16, Sept. 20: Local advocacy training calls • Stay tuned for conference call trainings throughout the year based on affiliate needs 	<ul style="list-style-type: none"> • Fall affiliate training/summit 	<ul style="list-style-type: none"> • March 14: Habitat at the Capitol (annual advocacy day takes place in February or March every year) 	<ul style="list-style-type: none"> • TBA: Build Oregon fundraiser • April or May (biennial tradeoff): Habitat Heroes Conference or statewide affiliate training • May 2-3, 2019: HR Summit • April 15-17, 2020: Heroes Conference

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Scholarships		<ul style="list-style-type: none"> • Oct. 1: RE:Conference Homeowner Empowerment Scholarship application due • Nov. 29: Scholarship receipts due for reimbursement 		<ul style="list-style-type: none"> • TBA: Human Resources Summit scholarship application due
Networking Groups	<ul style="list-style-type: none"> • Various groups meet 	<ul style="list-style-type: none"> • Various groups meet • November: Networking group chair conference call check-in 	<ul style="list-style-type: none"> • Various groups meet 	<ul style="list-style-type: none"> • Various groups meet • May: Networking group chair conference call check-in
Governance and Staffing	<ul style="list-style-type: none"> • Onboard new VISTA and AmeriCorps volunteers 	<ul style="list-style-type: none"> • Elect new officers and board members • Train new board members 	<ul style="list-style-type: none"> • Assess staffing levels 	<ul style="list-style-type: none"> • Enlist board in development activities • Create board succession plan • Assess board recruitment needs • Proceed with annual staff reviews • Create next FY job plans
Disaster Preparedness	<ul style="list-style-type: none"> • Back up all electronic files • Secure all crucial files in fireproof storage • Secure vital records 		<ul style="list-style-type: none"> • Update contact information for staff, board members, homeowners, key volunteers, emergency contacts, etc. 	
Other Resources and Events of Interest		<ul style="list-style-type: none"> • Oct. 23-24: RE:Conference presented by Neighborhood Partnerships 		

Funding and Capacity Building Opportunities

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HFHO Loan and Pass-Through Grants			<ul style="list-style-type: none"> Let HFHO know if you are interested in participating in FHLB funding 	
Federal Homes Loan Bank Des Moines (FHLB)		<ul style="list-style-type: none"> Establish contact with FHLB sponsor entity (Umpqua, Banner Bank) Audit 	<ul style="list-style-type: none"> Participate in FHLB application phase 1 (can be in partnership with HFHO) 	<ul style="list-style-type: none"> Complete FHLB application Perform policy audit
LIFT	<ul style="list-style-type: none"> June 26: First round due Late September: Awards announced 	<ul style="list-style-type: none"> October: Release of NOFA Late October: Next NOFA released; new applications accepted for round 2 		
NeighborWorks Umpqua Individual Development Accounts (IDAs)	<ul style="list-style-type: none"> July: IDA fund distribution 		<ul style="list-style-type: none"> February: Participation deadline for IDA program Early March: IDA application due for HFHO 	
Other Grants and Foundations	<ul style="list-style-type: none"> No deadlines: Murdock, Ford Family Foundation, ... (feel free to reach out to Andrew, Grant Loan and Manager, for more information) 			
Other Funding Resources	<ul style="list-style-type: none"> Mid-July: Meyer Memorial Trust (MMT) application due 	<ul style="list-style-type: none"> Mail holiday/year-end appeal 		<ul style="list-style-type: none"> Mail fundraising appeal Submit U.S. Bank grant Submit Bank of America grant June: MMT proposals due