2018 Habitat Heroes Affiliate Conference
Workshop Offerings

LEARNING TRACK ABBREVIATIONS
Board of Directors: BD
Construction Management: CM
Fundraising: FR
Homeowner Services: HS
Leadership & Management: LM
ReStore: RS
Volunteer Management: VM

PRE-CONFERENCE: THURSDAY, March 1

Pre-Conference (11:00 a.m. – 4:00 p.m.)

Neighborhood Revitalization Tour – Cully Neighborhood, Habitat for Humanity Portland/Metro East.
Participants are invited to tour neighborhood revitalization efforts in Portland’s Cully neighborhood. Since 2013 Habitat for Humanity Portland/Metro East has been an active member in the Living Cully coalition, a group of nonprofit organizations committed to working together to foster community led development and prevent displacement in Cully. Participants will have the opportunity to hear from coalition partners, community organizers, and residents to learn about community engagement, policy, advocacy, and anti-displacement efforts that have been implemented to help ensure that existing residents play a key role in determining what the future of their neighborhood looks like. HFHI’s Quality of Life Framework will be used as a tool to understand neighborhood changes specifically in the context of revitalization efforts in Cully. Learn more about the initiative here: http://habitatportlandmetro.org/programs/neighborhood-revitalization/

Pre-Conference (12:30 p.m. – 4:30 p.m.)

QLO Washington State Certification - Facilitator: TBA
This session is for WASHINGTON STATE RESIDENTS ONLY and will satisfy your State specific training for QLO certification required by HFHI.

Pre-Conference – separate registration (All day Wednesday, February 28th and March 1st)

Competent Person Training – Ed Brown, Sr. Specialist – Construction Technology, Habitat International
This two day training will be held February 28th and March 1st (directly before our Heroes Conference) at Evergreen Habitat for Humanity in Vancouver, Washington. Please find details and register for this event separately at: http://events.constantcontact.com/register/event?llr=bresp9iab&oeidk=a07eev4aggq8b43988c

State Receptions (4:30 p.m. – 6:00 p.m.)
All participants are welcome to register for this state specific networking and mingling opportunity being held at the DoubleTree hotel. There is no additional charge for this time together!

CONFERENCE DAY 1: FRIDAY, March 2

Devotional – Optional (7:30 a.m. – 8:15 a.m.)
David Heddy, Manager – Affiliate Services, HFHI

Plenary (8:30 a.m. – 9:15 a.m.)
Keynote: Lou Radja, Award-winning Motivational Speaker, Author and Social Entrepreneur

Networking Groups (9:45 a.m. – 11:30 a.m.)
- Board of Directors – with George Myers
- Construction Management
- Fundraising – with Sarah Mackey
- Executive Directors
Cash Flow Forecasting or Budgeting? Which is more important?  – Facilitator: Karen Rockwell, Executive Director, Benton Habitat for Humanity

How important is cash flow forecasting? Isn’t our budget enough? Can the two items actually work together? This session will show why both tools are essential and can create more effective cash reserves. Attendees will also have access to cash flow tools available to customize to affiliates needs.
(CM, VM) **Keeping Volunteer Groups Coming Back for More** – Kris Cowan, Hands-on Building Construction Technology Instructor, Portland Community College

How can we cultivate healthy partnership while juggling volunteers, construction, safety and training on site? Learn about different ways to maintain healthy relationships with long-term partner volunteer groups, and get tips on how to manage large groups, stay organized and strengthen partnerships.

(FR, BD, LM) **Retaining Donors to Increase the Bottom Line** – Dr. Sarah Mackey, Project Director for the Collaborative Operating Model, Habitat for Humanity International

Are you under constant pressure to raise more money? If so, this session is for you. Participants will learn tools and techniques to indefinitely retain loyal donors who give at increasingly generous levels over time. Learn how to increase the efficiency and productivity of your resource development efforts to raise more money in support of the mission.

(HS) **Mortgage Servicing: Servicing Regulations and Best Practices** - Tera Doak, Associate General Counsel, Habitat for Humanity International and Marsha Beeler, Senior Support Specialist-Homeowner Services, Habitat for Humanity International

The financial health and sustainability of your affiliate is dependent on the strong performance of your mortgage portfolio. This presentation will cover compliance requirements and best practices for in-house servicing of mortgages from closing to loan payoff, including escrow management and loss mitigation options.

(LM, BD) **Advocacy at Work: Using your Habitat Voice to Change Policies and Gain Resources** – Facilitator: George Myers, Consultant, gmers Consulting, LLC and Panel

Learn how affiliates are actively using their voices to change policies and gain access to resources that benefit affordable housing in their local communities. This panel will feature affiliate leaders from Washington, Oregon and Hawaii who have built relationships with their community leaders and legislators, and used these connections to advocate for housing solutions and resources. Come hear how they work at the local, state, and national levels. Participants can get their advocacy questions answered and join in the discussion. Join panel members: Sherri Dodson, Executive Director at Habitat for Humanity Maui, Lauden Espinoza, Board Member at Habitat for Humanity of Washington and Senior Public Information Officer for the WA Senate Majority Coalition Caucus, Jason Gauthier, Director of Operations at Tacoma/Pierce County Habitat for Humanity, and Rick Rodgers, Executive Director at Newberg Habitat for Humanity.

(RS) **ReStore Safety and Risk** – Mark Little, Director of Support and Operational Development, ReStore Support Group, Habitat for Humanity International

Discover updated tools and resources dedicated to creating and maintaining a safe environment in your ReStore. Help fight the greatest risks for ReStore success and learn all you can about how to keep your people and your store safe!

(VM, BD, LM) **Discovering Resident Power** - David Heddy, Manager – Affiliate Services, Habitat for Humanity International

Resident participation, leadership, trust and motivation to act are essential to community revitalization; and, Asset Based Community Development informs us that a community is mobilized through networks of relationships, discovery of local gifts, and applying local assets for the common good of the neighborhood. Connector leaders are central to these relationships and to engaging residents in sustainable neighborhood revitalization. Therefore, it is important for affiliates to identify, participate with and collaboratively develop resident power. This session will cover how to identify connector leaders, types of power present among residents, and how to foster meaningful partnerships to achieve participatory neighborhood revitalization.

**SATURDAY, MARCH 3**

**WORKSHOP 2 (10:15 a.m. – 11:45 a.m.)**

(BD, LM) **Board and Staff Equity, Diversity and Inclusion** – Dani Ledezma, Equity and Diversity Consultant

What’s the difference between diversity, equity and inclusion? Join this session to learn more about how to create a diverse organization. From identifying qualified candidates who are interested and willing to invest in the mission, to creating an environment where all of the organization’s members feel welcomed and engaged, this session will help your affiliate to thrive.

(CM) **On-site Project Management: Best Practices and Tips** – Kevin Gobble, Senior Construction Specialist, Habitat International

Habitat construction staff truly are heroes on a regular basis. Learn some best practices and tips to help you juggle all your tasks and people! This workshop will give you some tools to successfully manage volunteers, formalize your daily structure and communicate more efficiently and effectively with your team. Learn best practices for safety, planning and communication on site.
**Demystifying Planned Giving** – Jason Drews, Lead Financial Consultant, Thrivent Financial

Planned gifts are often the largest gift an individual can make. Learn the 3 most common types of planned gifts, how to begin discussions with donors about planned giving and how to integrate planned giving into your affiliate’s messaging/marketing.

**Owner Occupied Repairs, Legal and Compliance Issues** – Walter Fields, Program Manager – Repair Programs, Program and Grant Management, Habitat for Humanity International

Many affiliates have been surprised to learn that performing repairs and collecting payments for them over time is as regulated as home sales and mortgages. Join this session to see how compliance can easily be accomplished, often within existing policies and procedures, and learn about issues commonly regulated by state consumer protection laws and federal regulations. This foundation will help affiliates to determine appropriate program parameters, adopt policies and implement processes to carry out repairs for homeowners in their communities.

**Onboarding, Orienting, and Supervising Your Staff** – Iva Eden, Employee Relations Director - HR, Habitat for Humanity International

Learn what steps you can take to help new staff succeed! Key topics addressed in this workshop include affiliate staff handbooks, staff orientation sessions and NALO, work plans, SMART goals, quarterly and annual evaluations, and the use of coaching to keep employees on track.

**Building a ReStore Business Case** - Mark Little, Director of Support and Operational Development, ReStore Support Group, Habitat for Humanity International

Come learn advanced metrics for growth and strategic planning. During this course participants will identify growth opportunities, create a business case for investment (complete with sensitivity analysis!), and will head back to their affiliates with the beginnings of a new investment strategy.

**High Performing Committee Leadership** – Facilitator: David Heddy, Manager – Affiliate Services, Habitat for Humanity International and Panel

This interactive session will provide an opportunity for attendees to examine and discuss the 7-habits of highly successful committees.

**Determining House Price and Affordable Mortgage Amount** – Tera Doak, Associate General Counsel, Habitat for Humanity International and Marsha Beeler, Senior Support Specialist-Homeowner Services, Habitat for Humanity International
Attend this session to have all of your questions answered about determining the house price, the affordable mortgage amount, and subordinate mortgages under the new Habitat policies and in compliance with applicable laws. This session also highlights the proper role of any shared appreciation as a programmatic component, distinct from pricing and financing terms.

(LM, BD) **Working Together: Increasing Social Cohesion through Coalition Building** – Kevin Hiebert, Organizational Development Consultant - Neighborhood Revitalization, Habitat for Humanity International
The most powerful way to create change in a community is to bring people together. Habitat affiliates can be the catalyst for making a community truly sustainable and healthy through unifying neighborhoods and building sustainable partnerships amongst diverse groups. One of the most essential elements to increasing social cohesion is the development of a multisector coalition. This participatory workshop will equip you with the tools, frameworks and methodology to create, improve and increase your coalition participation.

(RS, LM) **ReStore Staff Management: What to do When the Going Gets Tough** – Iva Eden, Employee Relations Director - HR, Habitat for Humanity International
Managing staff and volunteers can sometimes be a challenge, especially when it comes to misconduct, disciplinary actions, paperwork and procedures. This workshop will help you set clear policies, rules and expectations, keep appropriate documentations, and give you best practices for progressive disciplinary action. It will also help you know what to say (and what not to say) when you have to take extreme measures and let someone go.

(VM, FR) **Transforming Volunteers into Donors** – Dr. Sarah Mackey, Project Director for the Collaborative Operating Model, Habitat for Humanity International
This session covers the intersection between giving and volunteering, the importance of creating a positive volunteer experience, and strategies for transforming volunteers into donors. Topics covered include collaborating internally, knowing your volunteers, orienting volunteers, holding focus groups, conducting peer/wealth screening, recognizing donor-volunteers, using crowdsourced fundraising, sharing cost information, and asking for financial support.

In partnership with Habitat for Humanity International