



Habitat
for Humanity®
of Oregon



Fiscal Year 2023 Annual Report: July 1, 2022 – June 30, 2023

Gratitude for an amazing fiscal year



Shannon
Vilhauer

Tammy
Baney

By any standard, 2023 has been an amazing fiscal year for Habitat for Humanity of Oregon.

In April, we hosted the 445-person Western Region Conference with the unifying theme of *Unlocking the Future: Building with Courage and Compassion*. Participants

included members of the Homeowner Advisory Council and community partner organizations. Our co-hosts from Oregon, California, Hawaii and Washington welcomed registrants from neighboring states, along with senior leaders from Habitat for Humanity International (HFHI).

Our year-long Habitat Equity Academy for Leaders (HEAL) culminated with an in-person gathering at the Oregon Garden Resort. February saw a return to in-person advocacy with Habitat on the Hill in Washington, D.C., where Homeowner Advisory Council member Ginny Carlson provided the sendoff as advocates from throughout the nation went to visit their federal delegations. The following month, our network of Oregon leaders and homeowners traveled to Salem to visit with members of the Oregon House and Senate, advocating to increase access to affordable homeownership statewide.

Amidst these gatherings, Oregon Housing and Community Services issued opportunities to apply for five different, long-awaited funding opportunities in support of affordable homeownership development and down payment assistance. Our small and determined staff team helped our network to maximize these unprecedented funding opportunities. Embracing a hub and spoke service model, we submitted successful applications providing our network with access to record levels of state and federal funding opportunities, including \$2 million from U.S. Department of Housing and Urban Development (HUD) Healthy Homes

Production Grant Program. We stepped fully into our role as a fiduciary officer of the Oregon IDA (Individual Development Account) Initiative, expanding opportunities for income-qualified participants to earn matched savings towards home repairs and home purchases.

Our team grew in size and capacity, adding two key members: Engagement Coordinator Lyndsey Summers and IDA Network Program Manager Gina Valencia. Throughout all of these significant accomplishments, our board and staff co-led efforts to steadily advance the priorities outlined in our DEI Roadmap.

This work continues to bear fruit. Despite challenges that include inflation, skyrocketing land prices and high interest rates, Oregon Habitat for Humanity affiliates have a record number of homes under construction. We repaired 377 homes last year, almost doubling our home repair rate in just two years.

We are committed to doing even more. Maintaining and repairing homes improves the vibrancy of entire neighborhoods and preserves our housing stock for generations to come. Investments in preserving existing homes and building new ones provide local, living wage jobs. Oregon counties realize further dividends through property taxes that support our local schools and infrastructure. Families are stronger and healthier when they have a stable, safe place to call home.

Thank you for walking alongside us as we engage in this life-affirming work. We are stronger together.

With heartfelt appreciation,

Shannon Vilhauer,
Executive Director

Tammy Baney,
Board President

Financial snapshot

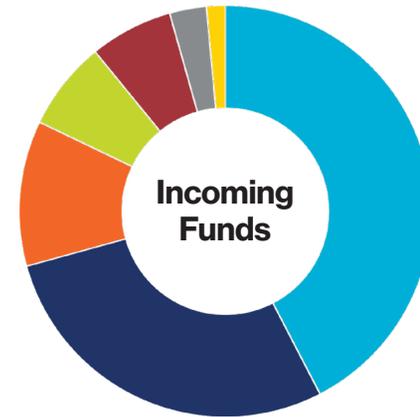
- Total Revenue: \$1,361,323
- Total Assets: \$4,303,856
- Liabilities: \$2,887,778*

*Habitat for Humanity of Oregon has received cash advances for the following grants from Oregon Housing and Community Services. When we incur qualifying expenditures, such as issuing down payment assistance to a qualifying first-time and/or first-generation homebuyer, we recognize these grants as revenue:

- Culturally Responsive Down Payment Assistance: \$1,479,854
- Home Ownership Assistance Program Down Payment Assistance: \$1,241,730
- Individual Development Account Matched Savings Program: \$100,000



- Program Services: \$1,132,951
- Administration: \$74,570
- Fundraising: \$55,998



- Earned Income: \$577,203
- State of Oregon Grants: \$385,297
- Corporations: \$155,542
- Individual Giving, Fund Drives and In-kind: \$95,139
- Oregon Charitable Tax Checkoff: \$88,797
- HFHI and Affiliate Donations: \$39,345
- Foundations: \$20,000

International support

In FY23, we tithed \$11,627 to support Habitat for Humanity's international work. We designated half of this tithe to support Habitat for Humanity homebuilding in Nepal and half in support of international advocacy campaigns.



Habitat Oregon board and staff met in Bend for a strategic planning retreat in September of 2023.

Affirming our commitment to equity

Habitat for Humanity of Oregon continues to center equity in its programs, services and board and staff culture. The following timeline celebrates activities which actualize this commitment.

September 2022: Build Oregon



We were thrilled to host **Build Oregon** for the first time since 2019. The event included a build day with Habitat Portland Region, the opportunity to learn about local housing needs and networking. Build Oregon featured equal participation from board, staff and members of the Homeowner Advisory Council (seven each), who also advised on priorities for the next legislative session.

In response to the network's continued desire to engage in DEI work and in lieu of formal training as we planned the 2023 Western Region Conference, we hosted a **book/multimedia club** from November through May. We read Heather McGhee's book ("The Sum of Us") to celebrate her keynote address at the conference.



The **Western Region Conference** planning team worked diligently to incorporate equity and housing justice into every aspect (e.g. session topics, speaker demographics and improved accessibility and inclusion).

April 2023: Western Region Conference



Spotlight on the Homeowner Advisory Council



Gerardo and Joni at Build Oregon

Habitat homeowners from across the state have been invited to join the Habitat Oregon Homeowner Advisory Council to help advance the reach and depth of our programs and advocacy efforts. The volunteer council began in 2021 and has continued to grow and evolve in membership. All members are compensated for their time and contributions at an hourly rate and are invited to participate in personal enrichment opportunities, such as professional development and networking. Habitat Oregon believes that homeowners can bring both on-the-ground knowledge and compelling personal perspective to

all aspects of our mission. In addition to attending quarterly meetings to provide ongoing feedback, here is a snapshot of other council activities:

- Participated directly in staff recruitment
- Informed Habitat Oregon's Individual Development Account (IDA) program design
- Helped shape Habitat Oregon's equity statement
- *September 2022:* Seven council members gathered for Build Oregon in Portland
- *November 2022:* Alongside two staff members, council member Kenya participated in a Midwest Academy Community Organizing training coordinated by HFHI
- *February 2023:* Council member Ginny participated in Habitat on the Hill and shared her story during the Hill Day sendoff
- *March 2023:* Council members Ginny, Kenya (and her daughter, Jeyla), Sara and Patty participated in Habitat at the Capitol
- *April 2023:* Four members (Ginny, Keith, Kenya and Patty) attended the Western Region Conference and participated in the opening plenary to share Habitat Oregon's equity statement

July

Aug

Sept

Oct

Nov

Dec

Jan

Feb

March

April

May

June

Our staff team actively promotes and pursues a **DEI and active anti-racism learning culture**. We met as a team in July, September, November, March and May to dive into targeted topics.

Habitat Oregon's work is undergirded by its **commitment to equity**. In the winter of 2022, board and staff finalized a statement that outlines our beliefs, responsibilities and recent actions. Read more at habitatoregon.org



October 2022: HEAL Capstone

Congratulations to the first graduates of the **Habitat Equity Academy for Leaders (HEAL)**, a year-long leadership initiative designed for Habitat staff and board members centered on diversity, equity and inclusion. Facilitated by Katharine Quince and Veronica Bañuelos, HEAL offered a space for Habitat leaders to engage in brave conversations, strategic technical work, tool-building and learning. The program concluded with a capstone event in October of 2022. In total, the 2021-22 cohort comprised of 17 graduates from 10 affiliates and Habitat Oregon.



March 2023: Habitat at the Capitol

Four Habitat homeowners attended **Habitat at the Capitol**, sharing their lived experiences to help amplify our message.

Optimizing the Habitat affiliate network



Habitat for Humanity of Oregon strives to advance and support a thriving network of effective and trusted Habitat affiliates. This year, we connected with every affiliate in Oregon – and several in neighboring states. Specifically, Habitat Oregon works with affiliates on technical and transitional support, staff and leader training, human resources, compliance, lasting affordability, capacity building, and general best practice sharing. In the last 12 months, Habitat Oregon has supported leadership transitions at four affiliates.

238 participants attended
12 training sessions

22 affiliates joined us for
at least one training

Training topic highlights

- Advocacy
- Funding opportunities
- HFHI initiatives
- Wildfire recovery

Spotlight on Networking Groups



Outside of the Western Region Conference, Habitat Oregon facilitated **16 Networking Group meetings** within six focus areas – Construction, Development/Fundraising, Executive Directors, Homeownership Services, ReStore and Volunteer Engagement. Attendance included **198 participants** from across the western region (**111 from Oregon**).

Some networking meetings feature guest speakers. For example, the Energy Trust of Oregon led two sessions on the house as a system for the Construction networking group.

Western Region Conference recap

In April of 2023, Habitat Oregon partnered with the affiliate support organizations in California, Hawaii and Washington to host the Western Region Conference. As the network's first in-person training since 2019, it was a huge hit in the region and also drew attendance from affiliates in Idaho, Minnesota, and Montana. In addition to a deeply stirring keynote address from New York Times best-selling author

Heather McGhee, the event included two thought-provoking panels: *Courageous Conversations on Anti-Racist Leadership* and *Unlocking the Future through Innovation and Equity*. Lastly, attendees participated in relational workshops geared toward improving skills and program offerings, as well as networking spaces designed to foster deep dives into social justice and DEI work.



Unlocking the future

Innovations

- Improved commitment to accessibility and inclusion
- Dynamic conference website and brand new mobile app to spark engagement throughout the event

445 record number of participants

118 organizations across 18 states and D.C.

78 speakers shared personal experience and expertise

24 sponsors, including 18 exhibitors

22 leaders from Habitat for Humanity International

21 breakout sessions and eight networking tracts

11 community partners and four homeowners



Members of Habitat Oregon's Board of Directors and the Homeowner Advisory Council presented our equity statement during the opening plenary.

“The conference was a great opportunity for me, as a board member, to bond with the organization staff. It was reaffirming of my knowledge and role and it was helpful in bringing new staff members up-to-speed on many evolutions within Habitat and housing.”

Unprecedented state and federal investments



Key successes in fiscal year 2023 have positioned Habitat for Humanity of Oregon and the 24 local affiliates we serve to further expand our collective impact. Using a hub and spoke service model, we have mobilized an unprecedented level of federal and state funding to support Habitat for Humanity's efforts on the ground. Here are a few examples:

- **\$2 million** from HUD's Healthy Homes Production Grant Program to expand access to critical home repairs, partnering with households of modest means in rural Oregon communities.
- **\$4.25 million** in down payment assistance from Oregon Housing and Community Services to expand homeownership access for first-time and first-generation homebuyers statewide.
- **\$850,000** from Business Oregon's new Economic Equity Investment Program that we paired with our existing loan capital to create the new "Rural Ready" hybrid grant/loan program to help rural affiliates secure and/

or pre-develop more than 80 lots for future homes.

- **\$300,000** for Habitat for Humanity of Oregon to step into our role as a Fiduciary Officer of the Oregon IDA (Individual Development Account) Initiative.

Habitat for Humanity of Oregon provides the back-office support needed to ensure program compliance with government funders. Consolidating these services make it possible for local affiliates to focus on scaling up the production of new homes and delivering critical home repairs. We provide training on how to maximize these new funding opportunities to align with our mission-driven programs. In recent months, Habitat Oregon hired our first Compliance Manager and a part-time Finance Specialist to support these new programs.

In addition, our small and determined staff team helped Oregon's network of Habitat for Humanity affiliates to access numerous programs administered by Oregon Housing and

Community Services:

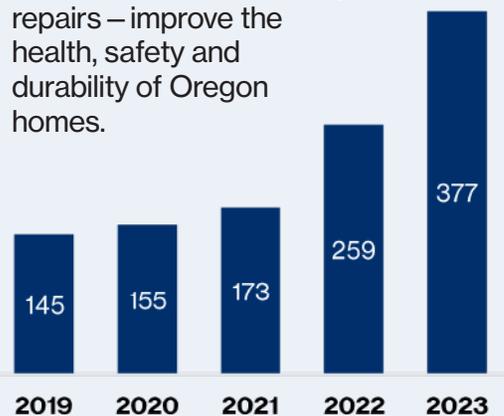
- Local Innovation Fast Track (LIFT) Homeownership Development
- The Homeownership Development Incubator Program (HDIP)
- The Market Cost Offset Fund
- Homeownership Assistance Program (HOAP) Training and Diversity, Equity and Inclusion (DEI) Consultation Grants
- Homeownership Support Services
- Language Access and Targeted Outreach Grants

These cumulative resources will make it possible for local Habitat affiliates to significantly scale up the production of new homes for sale in the coming months. For example, **Habitat Oregon helped 14 local affiliates secure \$25.1 million in LIFT and HDIP resources to expedite the construction of 170 new homes statewide.** Affiliates collectively secured another \$10 million to support internal program expansion, strategic planning, culturally appropriate program outreach and other initiatives.

HUD resources will support 200+ critical home repairs

In February of 2023, the U.S. Department of Housing and Urban Development (HUD) awarded Habitat for Humanity of Oregon \$2 million through its Healthy Homes Production Grant Program to help local Habitat affiliates make critical home repairs across the state.

Since Habitat's repair program started in Oregon more than a decade ago, the network has steadily increased its capacity to serve more households, completing more than **600 repairs in the past two years alone** (see the graph below). These projects – which range from painting and weatherization to accessibility modifications and major critical services, such as roof replacements or plumbing repairs – improve the health, safety and durability of Oregon homes.



Fueling Habitat's mission



Oregon is home to 27 ReStores operated by 22 affiliates. In addition to employing 140.52 full-time equivalent (FTE) staff, the stores reported a collective profit of \$3.14 million – these funds support Habitat's mission of building and repairing homes. **Shop, donate and volunteer: It's good for you, your community and the environment.**

Much to celebrate, more to build



The Oregon Legislature returned to meeting in person for the 2023 budget session. Habitat advocates journeyed to Salem to visit face-to-face with members of the House and Senate. Affiliate staff, board leaders and Habitat homeowners all shared their perspectives, emphasizing Habitat for Humanity's local achievements – and our desire to do more.

Early in the session, legislators passed HB 2001. This \$100 million housing package includes emergency shelter resources, modular housing investments to expedite disaster recovery, grants to improve on-farm workforce housing and anti-displacement provisions to improve Oregon's eviction statute.

Due to a walkout that left the Senate without a quorum, legislative work came to a standstill for six weeks. Thankfully,

the session resumed in mid-June with the passage of budgets for government agencies and some policy bills. These resources included more than a billion dollars to support the work led by Oregon Housing and Community Services, with \$413.3 million in general fund resources. Another \$604 million in Article XI-Q bonds will catalyze the development of permanent supportive housing, LIFT Rental and LIFT Homeownership (estimated at \$80 million).

Work remains to ensure that Habitat for Humanity and other affordable homeownership developers have the resources needed to expand the pipeline of new homes under construction. For LIFT Homeownership developments to pencil, we frequently need a one-to-one match of general fund resources. Only \$5 million was included for this purpose in the

Habitat at the Capitol 2023

43 participants from **14 affiliates** and staff from Habitat Oregon met with **48 state legislators**

end-of-session budget balance bill. Other unfinished business includes a much-needed general fund investment in the Oregon IDA Initiative. Habitat for Humanity of Oregon continues to lean in during the 2024 short session to pursue these key investments, as well as additional funding for the Economic Equity Investment Program newly administered by Business Oregon.

Advocacy events



In March of 2023, 43 advocates joined Habitat Oregon for Habitat at the Capitol in Salem (top). We also participated in efforts at the national level. In February of 2023, six Oregon delegates traveled to Washington, D.C., to meet with our state's federal lawmakers during Habitat on the Hill. We were joined in meetings by Adrienne Goolsby, Senior Vice President, U.S. and Canada at Habitat for Humanity International (bottom right photo, far left). A highlight of the trip was a rousing and heartfelt speech by Ginny Carlson, a member of Habitat Oregon's Homeowner Advisory Council, during the Hill Day sendoff (bottom left photo).

Staff

Shannon Vilhauer
Executive Director

Reianna DaRosa
Director of Programs

Prisilla McSwain
Compliance Manager

Sara Padilla
Grant Portfolio Director

Megan Parrott
Director of Engagement

Rick Rogers
Finance Specialist

Lyndsey Summers
Engagement Coordinator

Gina Valencia
IDA Network Program Manager

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Tammy Baney
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Steve Messinetti
Vice President

Virginia Ohler
Treasurer

Eric Richardson
Secretary

Jennifer Anderson

Isis Barone

Sonia Capece

Katie Curry

Robin Hartmann

Allan Lazo

Virginia Ohler

Juan Carlos Ordóñez

Lucinda Taylor

Board and staff as of February 2024

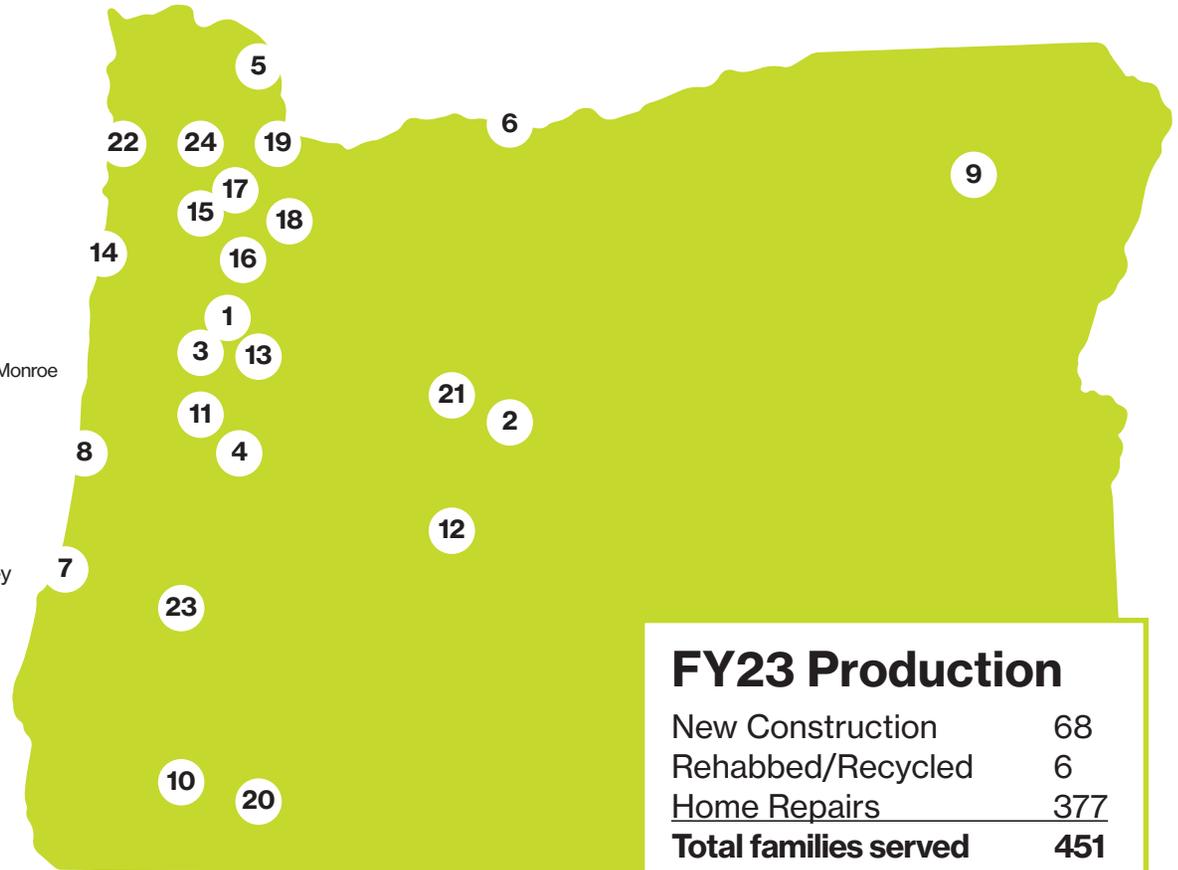


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Building homes, communities and hope in 18 Oregon counties

1. Albany Area
2. Bend-Redmond
3. Benton
4. Central Lane
5. Columbia County
6. Columbia Gorge
7. Coos County
8. Florence
9. Grande Ronde Valley
10. Grants Pass Area
11. Junction City/Harrisburg/Monroe
12. La Pine Sunriver
13. Lebanon Area
14. Lincoln County
15. McMinnville Area
16. Mid-Willamette Valley
17. Newberg Area
18. North Willamette Valley
19. Portland Region
20. Rogue Valley
21. Sisters
22. Tillamook County
23. Umpqua Valley
24. West Tuality



FY23 Production	
New Construction	68
Rehabbed/Recycled	6
Home Repairs	377
Total families served	451

Thank you for joining us to build a brighter future!

Your support goes beyond bricks and mortar; it builds brighter futures, unlocks stability, and fosters a sense of belonging. Whether you shop at the ReStore, serve on a Habitat Board of Directors, participate in a committee, volunteer at the build site, support this work financially, or lift your voice to advocate with us – we appreciate you!