



# Camp Habitat 2017

Honing the Craft  
October 2-6, 2017  
Lake Junaluska, NC

# Conference @ a glance

## Monday, October 2:

- 8:00-5:00: Competent Person Safety Training Day 1

## Tuesday, October 3:

- 8:00-5:00: Competent Person Safety Training Day 2
- 9:00-3:30: QLO Training and MPAR Session
- 9:00-5:00: Volunteer Management Training (HFH Certificate)

## Wednesday, October 4:

- 7:30– 9:00: Breakfast
- 9:00-10:30: Registration
- 10:30-11:00:  
Welcome/Logistics/Recognitions
- 11:00-12:00: Keynote, Boris Henderson
- 12-1:30 Lunch and Raffle Giveaway 1
- 1:45-3:15: Workshop 1
- 3:30-5:00 Workshop 2
- 5:30p-7:00p Dinner
- 7:00p-Until Visit to Boojum Brewery

## Thursday, October 5:

- 7:30-8:30 Breakfast
- 8:30a– 9:15a: Plenary 1
- 9:45a– 10:30a: Plenary 2
- 10:45a-12:15p: Workshop 3
- 12:15p-1:30p: Lunch and Raffle  
Giveaway 2
- 1:45p – 3:15 Workshop 4
- 3:30-5:00 Workshop 5
- 5:30-7:00 Dinner
- 7:30p Affiliate Executive Directors Listening  
Session, Moderator: Mary Welch, HFHI

## Friday, October 6:

- 7:30a– 8:30a: Breakfast and Closing  
Remarks
- 8:45-10:15 Workshop 6
- 10:30-12:00 Workshop 7
- Checkout

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HFHI Disaster Risk Reduction and Response

HFHI Home Repair Programs

The McLynn Group

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# Key Note Speaker

## Boris Henderson

Boris moved into his Charlotte Habitat for Humanity home when he was 11 years old with his mother. A proud Charlotte native, he is grateful for the support Habitat for Humanity provided his family when he was growing up. Boris is the board vice chair/chair elect for Habitat for Humanity Charlotte and is a newly elected member of the Johnston YMCA board.

A graduate of Davidson College (2001), he obtained a Master in Business Administration from Wake Forest University in 2006. He was inducted into the Davidson Athletic Foundation Hall of Fame in 2013 and served a six-year term on the Davidson College Athletic Foundation Board.

As a partner and chief financial officer of the Drakeford Company, Boris brings a deep reservoir of financial, underwriting and risk management experience to his role. Boris is responsible for capital, cash flow forecasting and modeling and construction and loan procurement. Prior to his current position, he held management roles with Wells Fargo, Wachovia Corporation and Wachovia Securities.

### Thursday, October 5th

#### Plenary Session 1 (8:30a-9:30a)

**The Role of the State Support Organization: Present and Future, Interactive Panel (SSO Board & Staff)**

#### Plenary Session 2 (9:45a-10:30a)

**HFHI's Collaborative Operating Model: Laura Belcher, CEO, Habitat Charlotte & Mary Welch, Sr. Director of Affiliate Services at HFHI, members, COM Executive Task Force**

# workshop schedules

## Workshop 1: Wednesday, October 4 (1:45p-3:15p)

**Capacity Guide for Affiliates**, Jill Cleveland HFHI: The Capacity Building Field Guide – In this session, learn how to Increase your affiliate's capacity to serve more families. Jill Cleveland will facilitate a guided tour of this tool for affiliate self-discovery and planning. The Guide was generated with input from affiliates across the country offering their on-the-ground experiences and best practices. Wi-Fi is available, so feel free to bring a laptop computer to follow along.

**Advocacy: Latest on the Federal Budget**, Carley Ruff, HFHI and Samuel Gunter, NC Housing Coalition

**Disaster Preparedness**, Autumn Lotze, SBP USA: If disaster strikes, are you prepared? What can you do now to help ensure that you and your community bounce back as quickly as possible? What kind of resources and support would make preparedness easier for your affiliate? This session covers practical measures you can take to protect against risks to your operations so that you are better positioned to provide support to the community in the event of disaster. Also included will be an opportunity for attendees' input on future resources to best support affiliate preparedness.

**Mortgage Origination and Loan Servicing - What sets Habitat Michigan Fund Apart from the Others?** (MPAR), Dan Lynch, Habitat Michigan Fund: Loan Origination and Loan Servicing and why affiliates may decide to leave both to the professionals.

**Local Housing Rehabilitation Services: How to Build Capacity**, Michael Handley, NCHFA: The goal of the session is to help affiliates who are considering offering local housing rehabilitation services and may want to work with the NCHFA's rehab programs. Building organizational capacity is essential to offering the services and being selected for funding for rehabilitation programs. Bring your questions about how to build capacity and succeed with offering a rehab program in your community.

**Sponsorships as a Source of Organizational Development**, Beth Russo, Asheville Area HFH, (**Fundraising Track 1 of 5**): Sponsorships are a significant source of the funds we use to do our important work. We'll explore how to identify potential corporate and organizational sponsors; how to secure sponsorships through themed builds and entry point sponsorships; and how to build long term relationships with corporations and organizations. We'll explore how we do this work in Asheville, and consider how corporate and organizational sponsorships can help increase your overall fundraising, your community profile, and contribute to institutional advancement and organizational development—while helping you fulfill your mission of building more houses.

**Using Technology to Build More Houses**, Charlie Marshall and Andrew Wing, Suite IQ: The SuiteIQ team explains how an intuitive, integrated platform enhances your mission of community enrichment by reducing administrative complexities and streamlining operations. Designed with affiliates for affiliates, the system promotes efficiencies and advancements within and across all business units as well as providing point-in-time assessments to ensure cost savings, enhanced fundraising and more, faster builds.

## Workshop 2: Wednesday, October 4 (3:30p-5p)

**Team Building**, David Moff & Jeanine Falcon, JER HR Group, ([HR Track, 1 of 2](#)): The Five Behaviors of a Cohesive Team will lay the groundwork for building a high functioning team. Trust and conflict are the foundational pieces you learn about in this session. We will also learn about the importance of commitment, accountability and results. Come prepared to participate in a collaborative and interactive session. [JER HR Group](#)

**Applying Fiscal Ratios to Measurable Affiliate Benchmarks**, Todd Fox, HFHI, ([Financial Track, 1 of 4](#)): Is your affiliate struggling with financial ratios and accountability? Do your staff and/or board not understand the basics of financial accountability? This session will instruct participants on some of the most important ratios and affiliate benchmarks in order to keep affiliates accountable to donors. Session includes hands-on discussions as well as participants having access to a customized spreadsheet with 10 important ratios/indicators and a board assessment tool.

**Neighborhood Revitalization Roundtable**, Facilitator, Jill Cleveland. HFHI: Come with your questions and prepared to share your successes.

**Advocacy - Statewide & Municipal Advocacy, Strategies for Local Success**, Carley Ruff, HFHI and/or Samuel Gunte, NC Housing Coalition

**Possible Partnerships with A Local HUD Approved Housing Counseling Agency**, Josh Burton NCHFA and panel:: In order to obtain HUD-related funding, Habitat affiliates have a three-year window to begin working formally with a HUD-approved housing counseling agency. This session brings together a HUD-Approved Counseling Agency and an affiliate already working effectively together. The session will include a discussion on other ways that Habitat can partner with a counseling agency to help their potential borrowers and homeowners.

**Fundraising: Getting the Results You Want: An Interactive Workshop**, Donna North & Melinda McVadon, The McLynn Group LLC ([Fundraising Track 2 of 5](#)): What is the secret of successful fundraising? It starts with this equation:  $N + R = R$ . Numbers + Relationships = Results. It's a simple truth. Relationships are key to fundraising. But don't forget numbers. Numbers give you the information you need to know to build those relationships. How do you build those relationships? How do you maintain these connections in the in-between time? What are your goals and what mix of actions will ensure you reach those goals? This workshop will take the mystery out of fundraising and give you specific actions and tools for taking your fundraising to a new level. [The McLynn Group](#)

**Design, Build, Perform: HVAC Systems for High Performance Homes**, Rob Howard, Mitsubishi Electric: Homes are now tighter and better insulated, resulting in lower cooling and heating loads and the need for smaller, more efficient mechanical systems. Traditional HVAC systems are often oversized, which causes "short cycling," resulting in indoor air quality issues and compromised cooling. This session addresses the way to design and install a "right sized" cooling and heating system for a high performance, low load home.



## Workshop 3: Thursday, October 5 (10:45a-12:15p)

**Team Building**, David Moff & Jeanine Falcon, JER HR Group, ([HR Track, Repeat](#)): The Five Behaviors of a Cohesive Team will lay the groundwork for building a high functioning team. Trust and conflict are the foundational pieces you learn about in this session. We will also learn about the importance of commitment, accountability and results. Come prepared to participate in a collaborative and interactive session. [JER HR Group](#)

**“2 + 8 = 10”: 2 Financial Guidelines to Live by + 8 Golden Ticket Rules of Non-Profit Finance =10 Mistakes Affiliates Can Avoid**, Todd Fox, HFHI ([Financial Track, 2 of 4.](#)): This presentation helps identify the 2 key financial accountability action items, 8 guideline checklist tools as well as the 10 mistakes affiliates should avoid and how to avoid them. This session is geared towards all audiences not just finance staff and includes a variety of vital topics and discussions.

**Roles and Responsibilities of Effective Boards**, Angela Kemper, CFRE, Partner, HunterKemper Consulting ([Board Governance Track, 1 of 3](#)): This interactive session will cover the key functions and responsibilities of an effective board of directors. Participants will develop specific, practical ideas for increasing board effectiveness and engagement. [HunterKemper Consulting](#)

**So, You Think you Want a Restore**, Dwayne Thompson, HFH Forsyth ([ReStore Track, 1 of 4](#)): 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.

**HFHI’s Collaborative Operating Model Roundtable**, Laura Belcher, HFHI Task Force Representative: Laura will continue a quick overview of COM and take questions in an interactive session.

**Capital Markets: Mortgage Leveraging & Additional Financing Opportunities**, Daniel Gura, HFHI: Daniel will walk affiliates through the financing options available in today’s Capital Markets. Affiliates will learn about the benefits, the potential risks involved, and best practices for appropriate financing and leveraging in today’s environment. They will then get a specific overview of the 5 most talked about mortgage-leveraging vehicles available to Habitat affiliates—FlexCAP, mortgage sales, Zero Equivalent Mortgages, local mortgage-backed financing, and the USDA 502 program. In addition, HFHI is continuing to work to create new financing options for affiliates associated with everyday work that they’re doing. We will discuss some of these potential products and elicit feedback from the attendees.

**Greensboro Housing Hub – a One-Stop Shop for Affordable Housing**, Maria Hanlin, CEO, HFH Greensboro: Habitat Greensboro began conversations 18 months ago with other housing non-profits to partner together to better serve our clients in one . With a bold, innovative dream, six housing non-profits have signed a lease and plan to move into the Greensboro Housing Hub in December. Enthusiastically embraced by city and foundation leaders who believe the Hub will transform the efficiency and effectiveness of how we empower the 6,000+ clients that we serve, city leaders are lifting this up as an example of collaboration. Greensboro believes this will be a model for other cities in our state and across our nation, with Habitat leading the way.



## Workshop 4: Thursday, October 5 (1:45p-3:15p)

**The Top 10 Biggest HR Mistakes**, David Moff & Jeanine Falcon, JER HR Group, (**HR Track, 2 of 2**): This session will highlight the legal and non-legal mistakes that nonprofits tend to make that can cause them real problems or create a toxic environment. [JER HR Group](#)

**How to Establish a Healthy Financial Picture at your Affiliate**, Todd Fox, HFHI, (**Financial Track, 3 of 4**): A healthy affiliate is more than a profitable ReStore. This session reviews the resources each affiliate needs to explore in order to gain strong financial diversification while being completely accountable and transparent.

**Marketing and Promoting Your ReStore**, Olivia Bowler, Marketing Associate, Habitat Wake ReStore, (**ReStore Track, 2 of 4**): ReStore Marketing Budget or no budget, small or large Restore operations, Olivia Bowler of Habitat of Wake County will show you tips of the trade and where best to invest your marketing dollars. What's the best return on your investment - radio, TV, print or social media? Olivia will break down a marketing plan based on your budget. HFH Wake County has 6 ReStores and generated \$5.3 million gross and \$1.7 million net in 2016.

**The Alphabet Soup of Loan Origination and Closing**, Rhonda Mack, Cape Fear HFH and Sonia Lee, HFHI: LE, GFE, TRID, TILA: These acronyms have driven you nuts at times. Whether you've closed 2 loans or 200, it's not easy to get a family to the closing table. Each loan presents unique challenges, but this session will provide some clarity around loan origination and closing and ways to stay compliant while bringing multiple funding possibilities together for the benefit of homebuyer and Habitat.

**Capacity Build Grant Application**, Tamara Page, HFHI: What does it take to grow an affiliate? Money for new staff to put the policies, procedures, systems, and community partnerships in place in order to serve more families? Where do affiliates begin with a plan for growth, find funding to hire staff and grow in all these areas? And what about shifting community priorities, changes in leadership and housing strategies inside and outside the affiliate? This Interactive session answers those questions and more, providing you with the tools for creating, implementing and managing a detailed work plan. Pre-conference readings and engagement with registrants, together with "table talk" (*past grantees will join the session to assist in small group work*) and in-class assignments and activities will be among the associated tools and takeaways. Email [cb@habitat.org](mailto:cb@habitat.org) and ask to access the application for The Capacity Build grant. Download the Field Guide to Capacity Building and review the information. Participants will have the opportunity to draft work plan language that will be a start for the CB Grant application. There will be many tools and takeaways.

**Working with Lead-based Paint and Asbestos**: Jeffery Dellinger, NC Dept of Public Health: If you do critical repair or any rehab work, you'll want to learn from Jeff about the critical issues when dealing with lead-based paint and asbestos.

**It's all in the Message: Leveraging the Power of a Brand**, Donna North & Melinda McVadon, The McLynn Group (**Fundraising Track 3 of 5**): Every organization has a brand, whether they know it or not! Do you know what your brand is? Do you know the power of your brand? Do you know how to leverage your brand? Leveraging your brand begins with telling your story. It may seem obvious, and it may seem simple, but a surprising number of nonprofits miss the mark. Why? What is your story? What makes it a good story? Who should hear it? Who should tell it? How often should you tell it? What does your brand have to do with your story? This workshop will leave you with new insights on telling your story in a way that maximizes your brand and engages donors, board members, volunteers and staff members. Come ready to share a challenge or a success. [The McLynn Group](#)

**Construction Roundtable**, Matt Cooksey, Executive Director HFH Alexander County:

## Workshop 5: Thursday, October 5 (3:30p-5:00p)

**Cash Flow Forecasting or Budgeting? Which is more important?**, Todd Fox, HFHI, (**Financial Track, 4 of 4**): 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 a more effective cash reserves. Attendees will also have access to cash flow tools to customize to their affiliates needs.

**Seven Steps to a Great ReStore**, Dwayne Thompson, HFH Forsyth & Jeff Mingus HFH Catawba Valley, (**ReStore Track, 3 of 4**): ReStores are a trend that will be fueled by the desire of the highest-potential and highest-spending customers' passion for a creative shopping experience that they can't find at other thrift stores. ReStores can and will reshape the retail thrift store landscape over the next decade—specifically demographic shifts, with both aging Baby Boomers and young Millennials looking for a more unique shopping experience. Join small and large ReStore leaders in this discussion on how to create an exciting and aesthetic shopping experience.

**Mortgage Origination and Servicing: A Conversation** (MPAR), Dan Lynch, Habitat Michigan Fund and Sue Chenevert, HFH Louisiana: Dan and Sue will answer questions and hear concerns about origination or servicing of loans.

**Capacity Build Grant Application**, Tamara Page, HFHI (**Repeat**): What does it take to grow an affiliate? Money for new staff to put the policies, procedures, systems, and community partnerships in place in order to serve more families? Where do affiliates begin with a plan for growth, find funding to hire staff and grow in all these areas? And what about shifting community priorities, changes in leadership and housing strategies inside and outside the affiliate? This Interactive session answers those questions and more, providing you with the tools for creating, implementing and managing a detailed work plan. Pre-conference readings and engagement with registrants, together with “table talk” (*past grantees will join the session to assist in small group work*) and in-class assignments and activities will be among the associated tools and takeaways. Email [cb@habitat.org](mailto:cb@habitat.org) and ask to access the application for The Capacity Build grant. Download the Field Guide to Capacity Building and review the information. Participants will have the opportunity to draft work plan language that will be a start for the CB Grant application. There will be many tools and takeaways.

**Design That Matters**, Rebecca Morris & Craig Bethel, TightLines Designs: TightLines Designs has sold many of its designs to Habitat affiliates across the country. Craig and Rebecca will share some of the elements of creating affordable, sustainable and beautiful housing.

**Demystifying Charitable Gift Annuities**, Ellen Jones, HFHI: (**Fundraising Track 4 of 5**): Learn how you can share the great benefits of a Charitable Gift Annuity with your donors and how HFHI can support your affiliate with gift annuity administration.

**Challenge and Compromise: Navigating the roles of Executives and Boards in Decision Making**, Bert Armstrong, Armstrong McGuire (**Board Governance Track, 2 of 3**): Decision-making between an affiliate's board of directors and chief executive can often feel like a tug of war – each side pulling against each other as leaders seek to influence organizational vision, resource allocation, and strategic direction. It doesn't have to be like this. There are ways for leaders – even ones with strong opinions and different approaches to decision making – come together to solve difficult problems and create great opportunities. This session will examine the roles and responsibilities required of staff and board leaders at different stages of an organization's life cycle. [Armstrong McGuire](#)

## Workshop 6: Friday, October 6 (8:45a-10:15a)

**ReStore Volunteer Engagement**, Scott Stetson, Asheville HFH (**ReStore Track**, 4 of 4): While volunteers don't (and shouldn't) replace paid staff, they are force-multipliers and capacity builders. Volunteers are also a key part of Habitat's identity! Explore the warning signs of an unhealthy volunteer program and the reality of what it takes to increase altruistic ReStore volunteer numbers.

**The Tithe and HFHI's International Work**, Susan Yow, HFHI: This workshop will examine some of the innovative programs of Habitat's international organizations. It will also explore different ways to involve your local community in this transformative work and increase your local impact through global partnerships.

**Working with Lead-based Paint and Asbestos**, Jeffery Dellinger, NC Dept of Public Health (**Repeat**): If you do critical repair or any rehab work, you'll want to learn from Jeff about the critical issues when dealing with lead-based paint and asbestos.

**SECU Challenge Update & Q&A**: Susan McLawhorn and Greg Kirkpatrick, HFHNC

**Launch Your Legacy Campaign Today, It's Easier Than You Think**, Ellen Jones HFHI, (**Fundraising Track 5 of 5**): Legacy gifts are often the largest gifts that an affiliate receives. Learn about 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 messaging/marketing. This session will include Charitable Gift Annuities, a vehicle that allows donors to receive a charitable deduction *and* an income stream. Come learn more about these valuable tools and how to begin conversations with donors. *Who should attend? Your affiliate's lead development/fundraising professional and/or any board members passionate about helping raise more individual philanthropic gifts for Habitat.*

## Workshop 7: Friday, October 6 (10:30a-12:00p)

**Owner-Occupied Repairs**, Walter Fields, HFHI: This workshop will cover: 1) the three Repair products Habitat International supports, what they entail and how repair services fit into our Habitat mix of construction products; 2) seven reasons why your affiliate should be providing repairs; and 3) how to begin repair services i.e. Readiness Checklist, finding families, pricing and payment, resources available from HFHI and more.

**House Pricing & Mortgage Structuring**, Sonia Lee, HFHI: Sonia will review the existing HFHI house pricing policy and talk through best practices in structuring a mortgage to fit the homebuyer's and Habitat's needs.

**Boost Your Board's Fundraising and Resource Development Impact**, Elizabeth Hunter, CFRE, Partner, HunterKemper Consulting, **(Board Governance Track, 3 of 3)**: What is the board's proper role in fundraising and resource development? How do you best get your board invested in its own fundraising success? Elizabeth will share ideas based on 20 years of consulting, experience running fundraising programs as a staff member, and 2 years working with Habitat International. [HunterKemper Consulting](#)

**Family Services, Outreach and Support: A Comprehensive Approach**, Jeff Paul, Housing Counselor, Asheville HFH: The first portion of this informative session will focus on tools for recruiting applicants. We will share ideas on outreach strategies including the use of information sessions to attract applicants. Next, we'll cover best practices for educating future homeowners. We'll see an example of an effective education program, discuss the benefits and challenges of implementing such a program, and identify community resources that can assist the affiliate in implementing an effective education plan.

**Volunteers: The Backbone of any Strong Habitat Affiliate: An Executive Director's Perspective**, Mike Campbell, Executive Director, HFH Forsyth County & Matt Cooksey, Executive Director, Alexander County HFH