



Together Towards  
**TOMORROW**

2019

Habitat for Humanity of Illinois Conference

# AGENDA

with Breakouts





## Thursday, November 7<sup>th</sup> Breakouts

11:15 am to 12:30 pm

### **3rd Party Mortgage Origination and Servicing**

Originating and servicing mortgages is a cause for stress for many affiliates. Come hear from conference sponsor, Affiliate Mortgage Services on how they can help your affiliate originate and service mortgages for you.

**Leader:** Dan Lynch, Affiliate Mortgage Services

**Audience:** Homeowner Services, Affiliate Leadership

11:15 am to 12:30 pm

### **ReStore Safety Guide**

This session will address the unique risks and safety challenges that come with running a ReStore and the best practices for reducing these potential hazards. Highlighted documents will include the new Habitat ReStore Safety Guide, a user-friendly, comprehensive, checklist-oriented document developed by HFHI for affiliates. Additionally, attendees will get a walkthrough of the document contents and discuss strategies to involve team members for maximum impact in safe ReStore operations.

\*This session is a required offering for all ReStore workshops.

**Leader:** HFHI ReStore Support Team

**Audience:** ReStore, Affiliate Leadership

11:15 am to 12:30 pm

### **Mortgage Regulations for Affiliate Leaders**

This session provides Affiliate Leaders (i.e., boards of directors, executive directors) a high-level summary of the federal mortgage regulations and related Habitat mortgage policies (including qualified loan originator requirements) and explains how they impact affiliates' lending practices sustainability and why compliance is essential.

**Leader:** Tera Doak and Marsha Beeler, HFHI

**Audience:** Homeowner Services, Affiliate Leadership

11:15 am to 12:30 pm

### **Developing Your Affiliate Construction Safety Program**

Share best practices for creating or continuously improving your affiliate construction safety program. Includes: adapting and adopting a Safety Policy Manual, creating and organizing an effective Safety Committee, developing best practices and safety trainings, and setting program schedules and goals.

**Leader:** HFHI

**Audience:** Construction, Affiliate Leadership

# Thursday, November 7<sup>th</sup> Breakouts

11:15 am to 12:30 pm

## **Creating a Fundraising Plan**

Would you set out on a road trip without a map or GPS? Probably not. Then why do so many of us set out with on our fundraising efforts without a map or clear direction? A solid fundraising plan serves as a roadmap and shows organizations where and how to allocate resources – both time and money. This workshop will cover: steps to develop your plan, assess fundraising activities to get the biggest bang for your buck, and essential elements of any fundraising plan.

**Leader:** Kristen Sand and Susan Mula, HFHI

**Audience:** Resource Development, Affiliate Leadership

11:15 am to 12:30 pm

## **Utilizing Volunteers to Build Capacity**

TBD

**Leader:** TBD

**Audience:** Volunteer Engagement, Affiliate Leadership

2:15 pm to 3:30 pm

## **The Closing Process: What is a Closing Disclosure Anyway?**

Closings can often seem scary and unknown for partner families and Habitat leaders. This session will provide affiliates with a standard closing package that can help expedite the process.

**Leader:** Roaa Al-Heeti, Maatuka Al-Heeti Emkes LLC

**Audience:** Homeowner Services, Affiliate Leadership

2:15 pm to 3:30 pm

## **Managing and Measuring ReStore Metrics**

This session will focus on applicable measurements for tracking various data points and how to start separating what can be tracked from what should be tracked to maximize the resources of the organization while creating the desired outputs for decision-making. Highlighted resources will include the Annual ReStore Report and future ReStore research initiatives.

**Leader:** HFHI ReStore Support Team

**Audience:** ReStore, Affiliate Leadership



## Thursday, November 7<sup>th</sup> Breakouts

2:15 pm to 3:30 pm

### **Be Fair – Fair Lending Compliance**

Habitat for Humanity serves those in need of affordable housing, period. Join this session to make sure that your affiliate is practicing what we are preaching, with an awareness of the widespread implications of fair lending laws to avoid potential, often inadvertent, mine fields arising from various activities throughout the application process and beyond.

**Leader:** Tera Doak and Marsha Beeler, HFHI

**Audience:** Homeowner Services, Affiliate Leadership

2:15 pm to 3:30 pm

### **Beyond Building Codes – Code + Construction**

Introduction to various code-plus construction and energy-efficiency verification programs. Includes: selecting a program, planning and implementation, assigning responsibilities, documentation, and tools for selecting energy raters.

**Leader:** HFHI

**Audience:** ReStore, Affiliate Leadership

2:15 pm to 3:30 pm

### **Volunteer Recruitment**

TBD

**Leader:** TBD

**Audience:** Volunteer Engagement, Affiliate Leadership

2:15 pm to 3:30 pm

### **Grant Writing Basics**

Building your grant seeking and grant writing skills is a great way to secure funding for your affiliate. Come learn a basic step by step process for researching and securing grant funding.

**Leader:** Sarah Brachle Wagner, SBW Solutions

**Audience:** Resource Development, Affiliate Leadership

## Thursday, November 7<sup>th</sup> Breakouts

2:15 pm to 3:30 pm

### **Mortgage Leveraging**

Habitat affiliates across the country are learning how to leverage their mortgage portfolio to build capacity. In this session, you'll hear from vendor Associated Bank on their program and how to utilize it.

**Leader:** Associated Bank

**Audience:** Homeowner Services, Resource Development, Affiliate Leadership

## Friday, November 8<sup>th</sup> Breakouts

9:45 am to 11:00 am

### **Down Payment Assistance – HIBI and other programs you can Leverage for your Homeowners**

Securing down payment assistance doesn't get any easier than this! Come learn about the Habitat Illinois and IHDA partnership that affords your homeowners between \$15,000 and \$20,000 of down payment assistance. Get information on other down payment assistance programs as well.

**Leader:** Sheila Dodd, Habitat Illinois and Carmen Williams, IHDA

**Audience:** Homeowner Services, Resource Development, Affiliate Leadership

9:45 am to 11:00 am

### **Donation Solicitation and Acquisition**

This is a special ReStore University selection that is being taken on the road due to high evaluation scores and popular demand! This session walks through the process of soliciting and acquiring both corporate and residential donations, with increased focus on the donor experience.

**Leader:** HFHI ReStore Support Team

**Audience:** ReStore, Resource Development, Affiliate



## Friday, November 8<sup>th</sup> Breakouts

9:45 am to 11:00 am

### **Legal Issues in the Homeowner Selection Process**

You've often heard that the success of the Habitat program begins with homeowner selection. This workshop will review legal requirements and Habitat policies relevant to your selection process, including (1) fair lending practices, (2) legal issues encountered in acceptance and denial of applicants.

**Leader:** Tera Doak and Marsha Beeler, HFHI

**Audience:** Homeowner Services, Affiliate Leadership

9:45 am to 11:00 am

### **Remember Board Basics?**

Revisiting the board basics of duties of care, loyalty and ability can help in revitalizing your board. This session will focus on these basics and how they play out in the real world.

**Leader:** Mary Welch, HFHI

**Audience:** Affiliate Leadership

9:45 am to 11:00 am

### **Energy Efficiency Programs**

The ComEd® Energy Efficiency Program affordable housing new construction (AHNC) offering provides technical guidance and incentives for developers of single-family and multi-family new construction and major renovation projects to reduce energy use for income eligible households. In this session, a ComEd energy efficiency expert will explain savings opportunities through the AHNC offering and the process for participation, as well as eligibility and technical requirements.

**Leader:** Brian Yeung, ComED

**Audience:** Construction, Affiliate Leadership

9:45 am to 11:00 am

### **Transforming Volunteers into Donors - Developing a Dynamic Strategy**

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.

**Leader:** Kristen Sand and Susan Mula, HFHI

**Audience:** Volunteer Engagement, Resource Development, Affiliate Leadership

# Friday, November 8<sup>th</sup> Breakouts

9:45 am to 11:00 am

## **ReStore Customer Service Culture**

This session will open with an overview of best practices on creating a positive culture around customer service in ReStores. Attendees will be asked to submit their top issues around customer service for an open discussion.

**Leader:** HFHI ReStore Support Team

**Audience:** ReStore, Affiliate Leadership

9:45 am to 11:00 am

## **Post Purchase Support Strategies**

Homeowners are great advocates and volunteers for affiliates, therefore, maintaining a positive relationship is key. How do you keep your homeowners engaged? This session explores ways to keep homeowners involved in the affiliate's work and the community and participants share best practices that are effective for them.

**Leader:** Tera Doak and Marsha Beeler, HFHI

**Audience:** Homeowner Services, Affiliate Leadership

9:45 am to 11:00 am

## **Improving Board Governance Through Aligned Relationships Between the Board and the ED**

Discover an organizational framework that leads your board and executive Director to greater collaboration and effectiveness. The framework will outline the strategic and future-looking orientation of a disciplined board while creating clear boundaries within which the executive director can lead and manage the affiliate's operations. Through an interactive discussion and presentation, board and executive staff members will learn how to align themselves with internal and external stakeholders and be in a better position to address feelings of inadequacy and burnout.

**Leader:** Ken Schuetz, Aligned Influence Consulting

**Audience:** ReStore, Resource Development, Affiliate

9:45 am to 11:00 am

## **Goals and Strategies: Increase Individual Giving**

This session reviews trend data in US philanthropy before diving deeper into effective strategies to upgrade and grow individual donor programs.

**Leader:** Kristen Sand and Susan Mula, HFHI

**Audience:** Resource Development, Affiliate Leadership



## Friday, November 8<sup>th</sup> Breakouts

9:45 am to 11:00 am

### **Get Ready for Anything: Business Continuity Planning for Your Affiliate**

A hurricane, a flooded office, a ReStore break-in, a warehouse fire, an unexpected departure of a staff member — every affiliate faces risks that can disrupt operations. To ensure your affiliate can operate through crisis, you must plan ahead.

**Topics include:**

- Key components & resources for Business Continuity Planning (BCP)
- Identify and discuss initial mitigation tactics
- Ownership of the BCP Process
- Protect your assets (property, people, information, finances and much more)

**Leader:** Anna Noonan, HFHI

**Audience:** Construction, Affiliate Leadership



# AGENDA

## Thursday – November 7, 2019

9:00 am – 10:00 am	Registration Open
10:00 am – 11:00 am	Opening Session
11:00 am – 11:15 am	Break and Exhibitors
11:15 am – 12:30 pm	Workshop Session #1
12:30 pm – 2:00 pm	Lunch
2:00 pm – 2:15 pm	Break and Exhibitors
2:15 pm – 3:30 pm	Workshop Session #2
3:30 pm – 3:45 pm	Break and Exhibitors
3:45 pm – 5:00 pm	Roundtable Discussions
5:00 pm – 6:00 pm	Networking Reception
6:00 pm – 8:00 pm	Dine Arounds

## Friday – November 8, 2019

7:00 am – 8:30 am	Breakfast
8:00 am – 8:30 am	Registration and Exhibitors
8:30 am – 9:30 am	Opening Session
9:30 am – 9:45 am	Break and Exhibitors
9:45 am – 11:00 am	Workshop Session #3
11:00 am – 11:15 am	Break and Exhibitors
11:15 am – 12:30 pm	Workshop Session #4
12:30 pm – 2:00 pm	Habitat Hero Luncheon
2:00 pm – 2:15 pm	Break and Exhibitors
2:15 pm – 3:00 pm	Closing Session

