

Track: Leadership Room: Monarch I

Session #1

Collaborative Operating Model | *Ann Goggins Gregory, Advisor @ Habitat for Humanity International and Janice Jensen, President/CEO @ Habitat for Humanity East Bay/Silicon Valley*
agregory@habitat.org jjensen@habitatebsv.org

Changes in technology, culture, and demographics demand that we consider new ways of approaching our work. To ensure the future of our mission, we need to engage in a conversation about a more efficient collaborative approach – one that balances our strong local presence with new approaches in an ever-more competitive fundraising landscape and that improves overall operational efficiencies for affiliates and HFHI. You will learn about the current work related to the Collaborative Operating Model and how you can stay engaged in exploring a new Collaborative Operating Model.

Session #2

Strengths-Based Leadership: Great Leaders, Teams, and Why People Follow | *Yammilette G. Rodriguez, Senior Director of Programs @ Youth Leadership Institute* yrodriguez@yli.org

StrengthsFinder is a revolutionary tool for measuring talents. In this double session, learn how to leverage your Talents and turn them into sustainable Strengths. **Note: this is part I of two sessions.**

Session #3

Strengths-Based Leadership: Great Leaders, Teams, and Why People Follow | *Yammilette G. Rodriguez, Senior Director of Programs @ Youth Leadership Institute* yrodriguez@yli.org

StrengthsFinder is a revolutionary tool for measuring talents. In this double session, learn how to leverage your Talents and turn them into sustainable Strengths. **Note: this is part II of two sessions.**

Session #4

Packaging & Delivering the Message | *Holly Fraumeni, Partner @ Lighthouse Public Affairs*
holly@lh-pa.com

Get unique insights on the legislative process and tools on how to approach local elected officials and candidates from a 20-year political veteran and lobbyist!

Session #5

A Case for Homeownership in Prosperous Places | *Isabella Chu @ Stanford Center for Population Health Sciences* isabella.t.chu@gmail.com

Session #6

World Café: Guided Small Group Roundtable Discussions | *Facilitated by Maureen Sedonaen, CEO @ Habitat for Humanity Greater San Francisco* msedonaen@habitatgsf.org

Track: Construction/NR Room: California

Session #1

Crossing the Threshold: What You Need to Know About Working Inside Owner-Occupied Homes |

Kathy Michalak, Executive Director @ Habitat for Humanity Riverside, and Jim Maring, Construction & Repairs @ Habitat for Humanity of Orange County, kmichalak@habitatriverside.org jim@habitatoc.org

Session #2

2020 Zero Net Energy Home Requirements | *Ruby Rose Yopez, ZNE and Building Energy Code Technical Specialist, Energy Codes and Standards @ Southern California Edison*

Whether your affiliate is large or small, or located in the north or south, we will all be required to meet the Zero Net Energy (ZNE) 2020 requirements just like every other builder. Come learn what ZNE really means and what it is going to cost to get there! We'll also address the updates for the 2019 energy code going into effect Jan 1st, 2020.

Session #3

Volunteers on the Worksite: Safety, Productivity, and Fun | *Leah Schueler, Volunteer Programs Manager @ San Gabriel Valley Habitat for Humanity and Jaymie Fisher, Director of Volunteer Services @ Habitat for Humanity of Orange County leah@sgvhabitat.org jaymie@habitatoc.org*

A great and humble man once shared this wonderful Habitat secret: *Our volunteers can do so much more than we realize.* Participants will learn and share ideas on getting the best our volunteers can give when we open ourselves up to partnering with these invaluable Habitat supporters.

Session #4

Home Repairs: Costing, Pricing, and Payments | *Renne Sanchez, Director of Home Preservation @ Habitat for Humanity Greater of Los Angeles, Lauri Reveles, COO @ Habitat for Humanity of Orange County and Tera Doak, Associate General Counsel @ Habitat for Humanity International rsanchez@habitatla.org lauri@habitatoc.org tdoak@habitat.org*

An overview of the Home Repair program, from initial inquiry to repair completion and repayment methodologies. Topics include outreach, inquiry, qualification, home walk-through and assessment, job estimating, construction/repair phase, use of subcontractors, and repayment.

Session #5

Acquisition and Development: How to Get it Done! | *Troy Hendrickson, VP of Land Acquisition and Development @ Habitat for Humanity of Orange County and John Kaye, President @ Argus Land Company/Argus College troy@habitatoc.org john@argusland.com*

This session will explore and discuss new development concepts for affiliates to consider. Based on current infill development in the private market, we will review development examples in terms of parcel size, product, and financial analysis. The discussion will also focus on the acquisition, entitlement, and development process.

Session #6

World Café: Guided Small Group Roundtable Discussions | *Leah Schueler, Volunteer Programs Manager @ San Gabriel Valley Habitat for Humanity leah@sgvhabitat.org*

Track: ReStore Room: Monarch 4

Session #1

Developing an Online ReStore Presence | *Tish Hubbard, E-Commerce ReStore Manager @ Habitat for Humanity Inland, and Dan Donaldson, Director of ReStores @ Habitat for Humanity Inland Valley*
tish@habitativ.org dan@habitativ.org

Participants in this session will explore digital options available to sell unique and high-value items and other items that would benefit from greater exposure to customers who don't currently know about or shop in the ReStore. Realizing that one size never fits all ReStores, but not wanting to reinvent the wheel, there will be discussion about best practices, resources currently available, and areas of caution and concern. The goal is to gain an understanding of what an affiliate can realistically expect to spend/achieve through an Online ReStore or other virtual marketing options.

Session #2

Effectively Opening and Managing Multiple ReStores | *Karen Moore, Director of ReStore Partnerships & Acquisitions @ Habitat for Humanity of Greater Los Angeles* kmoore@habitatgla.org

What are the issues that need to be addressed when considering opening additional ReStore locations? What are the challenges of managing more than one ReStore efficiently? This session will highlight the decision-making process when expanding an affiliate's ReStore footprint.

Session #3

Pros & Cons of "Purchase for Sale" Inventory | *Merrick Drake, Director of ReStores @ San Gabriel Valley Habitat for Humanity* mdrake@sgvhabitat.org

Learn from the real experiences of San Gabriel Habitat for Humanity about weighing the opportunities and risks of investing in purchased inventory. Participants will share their successes and lessons learned while developing a basis for analyzing the (ever increasing) future offers.

Session #4

Utilizing "Unpaid Staff" in the ReStore | *Torin Blount, ReStore Director @ Habitat for Humanity Fresno County* torin@restorefresno.org

A collaborative, high-level discussion on volunteerism in a ReStore from the Volunteer to the Voluntold, and everything in between. We will explore successful programs that are utilizing the necessary unpaid staffing to run a smooth ReStore operation.

Session #5

Strategies for Increasing ReStore Donations | *Robyn Willis, Director of ReStore Operations @ Habitat for Humanity of Orange County* robyn@habitatoc.org

Customer traffic and amount-per-sale figures are driven, to a large degree, by the quality of a ReStore's inventory. This session will focus on successful strategies for improving the quality/quantity of the items for sale in ReStores.

Session #6

World Café: Guided Small Group Roundtable Discussions | *Facilitated by Dirk Holkeboer, Executive Director @ Habitat for Humanity of Tulare/Kings Counties* dirk@hfhtkc.org

Track: Finance Room: San Clemente

Session #1

Things That Will Keep You Out of Trouble in Human Resources and Insurance! | *Dan Nichols, Director of Human Resources @ Habitat for Humanity of Orange County, Cynthia Koral, Chief Marketing Officer @ 501C Services, and Linda Johnson, WCG Program Administrator @ Nonprofits United*
dan@habitatoc.org ckoral@501c.com linda@nonprofitsunited.com

Hear from a panel of experts in human resources, unemployment, and workers compensation insurance. Save your affiliate time and money by gaining an understanding of some of the newest state regulations. Learn how to navigate new regulations on hiring, time/wage calculations, and insurance requirements. These great resources will benefit every affiliate.

Session #2

Shared Equity Housing: A Look at the Community Land Trust Framework | *Matthew Grundy, CEO @ Habitat for Humanity Fresno County and Founder of the Central CA Land Trust*
matthew@habitatfresno.org

Housing markets are heating up! The specter of displacement is looming over many places where affiliates are currently engaged in neighborhood revitalization. Discuss an alternative path to homeownership that promises lasting affordability and justice – through the community land trust model.

Session #3

Staying in the Fight: Financial Leveraging 2.0 | *Matthew Grundy, CEO @ Habitat for Humanity Fresno County and Daniel Gura, Director of Capital Markets and Financial Systems @ Habitat for Humanity International*
matthew@habitatfresno.org dgura@habitat.org

Construction costs are rising. Housing supply has not met our state's increase in demand. As an affordable home builder, we are fighting back! We will discuss ways to capitalize affiliate operations from local, regional, statewide, and national financial leveraging solutions.

Session #4

Take It to the Bank: Using the Community Reinvestment Act to Grow the Capacity of Your Affiliate | *Mary Salinas Durón, Senior Community Affairs Specialist @ Division of Depositor & Consumer Protection Federal Deposit Insurance Corporation (FDIC)*
mduron@fdic.gov

Explore innovative ways Habitat affiliates can partner with financial institutions regulated by the Community Reinvestment Act. Leave with a basic understanding of banking obligations under CRA, explore “win-win” structures that provide low-cost capital to affiliates while maximizing CRA benefits to banks, and hear a first-hand example from HFH of Greater Los Angeles.

Session #5

How Much Existing Money is Really Out There and What is on the Horizon? | *Holly Fraumeni, Partner @ Lighthouse Public Affairs and Janice Jensen, President/CEO @ Habitat for Humanity East Bay/Silicon Valley*
holly@lh-pa.com jjensen@habitatebsv.org

Come explore the variety of existing funding sources that exist at the local, state, and federal level of government; learn methods to access them and see what you might be missing!

Session #6

World Café: Guided Small Group Roundtable Discussions | *Facilitator Ginny Claborn, Director of Operations Habitat for Humanity CA*
ginny@habitatca.org

Track: Development/Marketing Room: Monarch 2

Session #1

Email, Direct Mail, and Social Media: How to Build a Direct Response Campaign | *Eric Alexander, Director, Individual & Leadership Giving @ Habitat East Bay/Silicon Valley* alexander@habitatebsv.org

A direct response campaign brings mail, email, and social media together to tell stories, engage the community, and raise funds for your affiliate. Hear from three affiliates about how to create a campaign that supports your mission and build a community of supporters.

Session #2

Best Practices for New Fundraisers | *Frances Hardy, Director of Resource Development @ San Gabriel Habitat for Humanity* fhardy@sgvhabitat.org

Fundraising is an art and a science. Fundraising for a Habitat affiliate can present amazing opportunities and challenges. If you are new to fundraising, this session will help you learn fundamental skills and the tactics and techniques that are unique to Habitat affiliates.

Session #3

Storytelling: Talking to Donors About Habitat's Mission and Homelessness | *Panel Discussion Facilitated by Anthony Singer, Director of Communications and Marketing @ Habitat for Humanity Greater San Francisco* asinger@habitatgsf.org

What role can Habitat play in the homeless crisis in California? How does affordable homeownership contribute to a stronger continuum of housing options in our communities? Fundraisers and communicators from several Habitat affiliates will lead a discussion on how we can tell our story to donors, community leaders, and volunteers.

Session #4

Faith Relations as a Source of Major Gifts | *Chris Untiet, Director of Faith Relations @ Habitat for Humanity Greater Los Angeles* chrisu@habitatla.org

The faith community can support your affiliate's mission in a number of ways: volunteers, annual gifts, and advocacy. Learn how the passion and reach of local faith groups can lead to major gifts for your affiliate.

Session #5

Thank You and Thank You: Donor Stewardship Best Practices | *Karen Begin, Director of Development @ San Diego Habitat for Humanity* karen.begin@sandiegohabitat.org

Stewardship is the key to donor retention and volunteer engagement. Join this panel discussion to learn about the newest practices in stewardship, and to see how Habitat affiliates say thank you in inventive and meaningful ways.

Session #6

Building Homes and Hope in 2019 – Reaching More California Tax Filers | *Sarah Jimenez, Senior Strategist @ Paschal Roth Public Affairs* sarah@paschalroth.com

Habitat for Humanity California and its affiliates have a unique opportunity once again to spread awareness about how California tax filers can make a tax-deductible donation during the tax season and help families have a decent place to live. With our freshly branded Build Homes Build Hope campaign and toolkit, there is an opportunity for affiliates of all sizes to engage in this effort. Learn how to utilize the toolkit materials from template social media to press releases and understand why keeping up a regular drumbeat across communication channels is vital in educating volunteers, donors, supporters and the public.

Track: Homeowner Services Room: Monarch 3

Session #1

Impact Report | *Lauren Shaughnessy, Director of Measurement and Learning @ Habitat for Humanity of Greater San Francisco* lshaughnessy@habitatgsf.org

To effectively advocate for affordable housing, it's critical to speak to the impact of the Habitat model not just in your service area, but across your region and state. Learn how Habitat California affiliates have embarked on a journey to collect common data and strengthen the story of their collective impact across the state. Learn how Habitat California structured the data collection process, the technology (Salesforce) used to analyze the data and the insights affiliates have learned to date.

Session #2

Building Your Homeowner Education Program | *Paula Garcia-Arsenault, Director of Family and Homebuyer Services @ Habitat for Humanity of Orange County* paula@habitatoc.org

Come learn how to build a homeowner education program. Hear from your colleagues on how to engage community partners, how to develop relationships with local experts, and how to build courses that meet the needs of your families.

Session #3

Qualified Loan Origination | *Marsha Beeler, Senior Support Specialist – Homeowner Services @ Habitat for Humanity International* mbeeler@habitat.org

Participants will gain a more thorough understanding of the federal mortgage regulations and be guided through the resources available at my.habitat to ensure compliant practices of the origination process. This session covers outreach and marketing, and homeowner selection and support – right through to closing the loan. We will discuss the role and requirements of a qualified loan originator, as well as resources that can be used in a compliant application process. **NOTE: This course is recommended for new Executive Directors and homeowner selection staff and volunteers.**

Session #4

What To Do When Life Happens | *Marsha Beeler, Senior Support Specialist – Homeowner Services @ Habitat for Humanity International* mbeeler@habitat.org

Foreclosure, bankruptcy, divorce, and death in family are all life events that affiliates will experience with their homeowners. Be proactive in having policies and procedures in place and family support courses that will help prepare homeowners for life's challenges - and prepare your affiliate to support them with fairness and clarity.

Session #5

Mortgage Regulations for Affiliate Leaders | *Tera Doak, Associate General Counsel @ Habitat for Humanity International* tdoak@habitat.org

This session provides affiliate leaders with 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 and sustainability. **NOTE: This course is highly recommended for new Executive Directors and Board Members.**

Session #6

World Café: Guided Small Group Roundtable Discussions | *Facilitator Paula Garcia-Arsenault, Director of Family and Homebuyer Services @ Habitat for Humanity of Orange County* paula@habitatoc.org